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INDITION COMMERCE

Point of Sale

User Manual — the complete guide to running your register: opening a shift, ringing up sales, taking payment, refunds & exchanges, cash-out, and the administrator settings.

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About this manual

Indition Point of Sale (POS) is a browser-based cash register that runs at `/pos/` on any modern computer or tablet. It rings up in-store sales against your live Shop catalogue, takes cash, card, and check payments, manages your cash drawer, and handles returns and exchanges.

This manual is written for the people who use the register every day. It is organised by who you are:

- **Cashiers** — read sections 1–9. Everything you need to open your till, ring up sales, take payment, and cash out.
- **Managers** — also read sections 10–11. Voids, oversell approvals, refunds, and the reports that tell you how the day went.
- **Store administrators** — read section 12 for the back-office settings. Hardware and first-time installation are covered in the companion *Setup Guide*.

Contents

1. Signing in & opening your shift

Signing in

Open your web browser and go to your store's register address, which ends in `/pos/` (your manager will give you the full address). You sign in with the same email and password you use for the Indition back office.

- Enter your **Email** and **Password** and click **Sign In**.
- Tick **"Keep me signed in on this terminal"** on a register that only you or trusted staff use, so you don't have to type your password every time.

Opening your shift (the drawer count)

The first thing you do each day is open a **shift**. A shift links every sale you ring up to you and to the cash that should be in your drawer, so the totals add up at the end of the day.

1. When you sign in, the **Open Shift** screen appears: *"No active session for [your name]. Count the cash in the drawer and enter the opening float to start the shift."*
2. Count the cash already in your drawer (your starting "float").
3. Type that amount into **Opening cash float**, or tap one of the quick buttons: `$0` `$50` `$100` `$200` `$300` `$500`.
4. Click **Open Shift & Start Selling**. You'll see *"Shift opened · float $X.XX"* and the register is ready.

> **Note:** Your store may be set up to skip this step. If counting isn't required you'll see a **"Skip the count and open at $0"** button, and if shifts are turned off entirely the register opens straight to the sales screen.

2. The register screen at a glance

The screen has two halves. The **left side** is the current sale (the receipt as it builds). The **right side** is where you work — searching for products, picking a customer, and taking payment, organised into three tabs.

Top bar

- Your name badge (e.g. *Cashier: John Smith*), a **Cash** link (the cash-drawer panel), and **Sign out**.
- A reminder strip of the most-used keys: `F1` New · `F2` Customer · `F3` Search · `F4` Pay · `Del` Void · `F5` Discount · `Esc` Cancel.
- On the right: text-size buttons (**A** / **A** / **A**), a light/dark theme toggle (☀ / ☾), and a live clock. Your text-size and theme choices are remembered on that computer.

The sale (left side)

- **Customer bar** — shows *Guest* until you attach a customer.
- **Items list** — columns are *Qty* · *Item* · *Unit $* · *Total*. Empty until you add something: *"Scan a barcode or search for a product to begin."*
- **Totals** — Subtotal, any Discount (in red), Tax (with the rate shown), and the bold **TOTAL**.

The work area (right side)

Three tabs:

- `F3` **Products** — search or scan to add items (this is the default tab).
- `F2` **Customer** — look up or create a customer.
- `F4` **Payment** — take the money.

Bottom bar

Quick buttons for `F1` New Order, `Del` Void Item, `F5` Discount, `F6` Note, `F7` Hold, `F8` Recall, `F9` Find Order, and (if your store uses Service & Repair) `F10` Work Orders. The big **F4 PAY NOW** button is on the right.

3. Adding items to a sale

Scanning a barcode

Just scan. The register is always listening for the scanner, so you don't need to click into the search box first. The item drops straight into the sale and you'll see a brief *"Added: [product name]"* confirmation.

Searching by name

1. Press `F3` (or click the **Products** tab) and start typing a product name or SKU.
2. Use `↑` `↓` to move through the results and `Enter` to add the highlighted one, or click the **+** button next to any result.
3. Click the small **i** button on a result to see full product details — photos, stock on hand, on-order count, description, and specifications — before adding it.

Quick Categories let you filter the list to one department with a tap. **Quick Keys** are one-tap buttons your administrator pins for your best-sellers (e.g. a class fee or a bag of needles).

Items that ask a follow-up question

- **Products sold by the unit** (fabric by the yard, items by the foot/pound, etc.) open a **Quantity** box. Enter a whole number plus a fraction button (⅛ ¼ ⅓ ½ ¾) or type a decimal like `3.25`. The running total updates as you choose.
- **Serial-numbered products** open an **Enter Serial Number** box. Scan or type the serial; you'll see ✓ *Available* in green when it's valid. Click **Add to Order**.

Changing quantity or removing an item

- Click the **Qty** on any line to open the quantity editor — use **–** / **+**, then **Update**, or **Remove Item** to take it off.
- To quickly delete the selected line, press `Del` or the **Void Item** button.

4. Customers

Attaching a customer is optional for a cash sale but recommended — it links the sale to their history, loyalty, and saved cards, and is required for keyed card entry if your store turns that on.

Finding an existing customer

1. Press F2 for the **Customer** tab.
2. Type a **phone number or name**. Results appear as you type — use ↑ ↓ and Enter, or click to attach.

Creating a new customer

Click **+ New Customer**, fill in the form (first/last name, email, phone, and address — all required), and click **Save Customer & Continue**. To skip entirely, click **Continue as Guest**.

> **Tip:** A green **TAX EXEMPT** badge appears on the customer bar if the customer is flagged tax-exempt in their record — the tax line drops to zero automatically.

5. Discounts, notes, hold & recall

Discounts F5

Press F5 to open **Apply Discount**. Choose **Percent %** or **Amount $**, type the value (or tap a preset 5 / 10 / 15 / 20 / 25 / 50%), and pick whether it applies to the **Entire Order** or a **Selected Item**. Click **Apply Discount**.

You can also discount a single line directly: click that line's **Total** price to open the **Line Discount** box. The discount shows in red on the line and in the order totals, and tax is recalculated on the discounted amount.

Order note F6

Press F6 to attach a note to the sale (for example a special instruction). It shows as a badge on the totals and prints on the receipt.

Hold & recall F7 / F8

- **Hold** (F7) — parks the current sale (optionally with a name like the customer's) so you can serve someone else. The cart clears and you get a fresh sale. You'll see *"Order held as [number]"*.
- **Recall** (F8) — opens the list of held sales (item count, customer, time, total). Tap one to bring it back. Your current cart must be empty to recall.

6. Taking payment

When the cart is ready, press `F4` or click **PAY NOW**. Pick a payment method. Which buttons appear depends on what your store has enabled — typically 💵 **Cash**, 💳 **Credit / Debit**, and optionally 📝 **Check** and ⚡ **Split**.

Cash

1. Click 💵 **Cash**. The amount **Due** is shown.
2. Type the cash handed over in **Amount Tendered**, or tap a quick button ($1 / $5 / $10 / $20 / $50 / $100), or **Exact** to fill the exact total.
3. The green **Change Due** appears once you've entered enough.
4. Click **Complete Sale** (or press `Enter`). If your drawer is connected, it pops open automatically.

Credit / Debit card

1. Click 💳 **Credit / Debit**. If a card reader is connected you'll see its status; the amount to charge is shown (including the card fee if your store applies one — see section 7).
2. Click **Charge $X.XX**. The screen shows *"Sending to reader..."* then *"Follow prompts on reader..."*.
3. The customer taps, inserts, or swipes on the reader. When it says **Approved**, the sale completes and the receipt screen opens.

If your store keys cards in by hand (no physical reader), a secure card-entry form appears instead. Card details are handled directly by the payment provider and never stored on the register.

Tips

If tipping is enabled, an **Add a tip?** prompt appears before the card is charged. The customer picks a preset percentage, enters a custom amount, or chooses **No tip**. The tip is added to the card charge.

Saved cards

When a customer is attached and your store allows it, you can tick **"Save card on file"** during a card sale. Next time, their saved card appears as a one-tap button (e.g. 💳 *VISA ••••1234*).

Check

Click 📝 **Check**, enter the **Check Number**, and click **Accept Check**.

Split payment

Click ⚡ **Split** to combine tenders on one sale (e.g. $50 cash + the rest on card). The panel always shows **Total**, **Paid so far**, and **Remaining**. Add each tender (**Add Cash** / **Add Card** / **Add Check**) until Remaining reaches $0, then the sale completes.

7. The card processing fee

Your store may pass the card-processing cost on to customers who pay by card. When this is turned on, a card sale shows the breakdown clearly on the payment screen, for example:

`Subtotal $100.00  +  card processing fee $3.20`

The fee is calculated as a percentage of the card amount plus a small fixed amount — the common default is **2.9% + $0.30** (so a $100 card sale is charged $103.20). Key points to know at the register:

- The fee **only** applies to card payments. **Cash and check are never charged a fee** — so a customer can avoid it by paying cash.
- The fee is shown as its own line so the customer sees exactly what's added. It is added *on top* of the total; it never reduces what the store collects on the sale itself.

> **Note:** Service & Repair work-order payments taken at the register use their own separate fee setting, which may differ from the POS fee.

8. Finishing the sale & receipts

After payment, the **Sale Complete ✓** screen shows the receipt with its sale number, items, totals, and payment. Choose how to deliver it:

- 🖨️ **Print Receipt** — opens your printer dialog.
- 📧 **Email Receipt** — sends to the customer's email on file.
- 📱 **Text Receipt** — texts the customer's phone on file.
- **No Receipt** — skip.

The register then returns to a fresh sale automatically. You can also press `F1` at any time to start a new order (you'll be asked to confirm if the current cart isn't empty).

> **Note:** Email/Text only work if the customer has an email/phone on file — for a guest you'll see a gentle warning instead.

9. Cash drawer & closing your shift

Click **Cash** in the top bar to open the **Cash Drawer & Shift** panel at any time. It shows your running totals: **Sales**, **Refunds**, **Net**, the **by-tender** breakdown, and the **Expected cash** that should be in your drawer.

Mid-shift cash movements

Use these buttons whenever cash moves in or out of the drawer for a reason other than a sale. Each asks for an amount and an optional reason, and (if enabled) pops the drawer:

Button	Use it when...	Effect on expected cash
Pay In	You add cash to the drawer (e.g. extra change)	Increases
Pickup	You bring cash into the drawer from the safe	Increases
Pay Out	You take cash out for an expense (e.g. reimbursing a driver)	Decreases
Drop	You move cash to the safe/deposit	Decreases
Open Drawer	You need to open the drawer with no sale	No change

Closing the shift (the Z report)

1. Open the **Cash** panel and count the physical cash in your drawer.
2. Type that figure into **Counted cash in drawer**.
3. Click **End Shift & Print Z**. You'll see the **Expected**, your **Counted** amount, and the **Variance** (green if it matches, red if it's over or short). Confirm to close.
4. The **Z Report** appears with the full shift summary. Print it (or screenshot it), then choose **Start New Shift** for the next cashier or **Done**.

The expected cash is worked out as: *opening float + cash sales − cash refunds + pay-ins/pickups − pay-outs/drops*. The variance is simply your counted cash minus that expected figure.

10. Refunds & exchanges

Press F9 to open **Find Previous Order**. Search by **sale number, customer name, phone, or email** and click the matching sale.

A straight refund

1. On the sale, choose how much of each line to return (with serial-level control on serialized items).
2. Pick the **refund method** (back to the original card, or cash) and optionally type a reason.
3. Click **Process Refund**. Returned items go back into stock and the customer is refunded.

An exchange

From the same screen, click **Exchange Items →**. Select the items being returned, then add the replacement items. The register works out the difference:

- **Even exchange** (returned = new): click **Complete Exchange**, no money changes hands.
- **Customer owes money** (new worth more): take the difference like a normal payment.
- **Money owed to customer** (returns worth more): pick a refund method and click **Process Refund & Complete**.

> **Permission:** Voiding or refunding completed sales normally requires a manager. If your store allows cashier self-void, you can void only *your own* sales while your shift is still open — older sales and other cashiers' sales still need a manager.

11. Manager tasks

Voids

A **void** cancels a completed sale. By default only managers can do this. When a cashier hits a sale they're not allowed to void, a manager signs the action off.

Approving an oversell

If your store blocks selling out-of-stock items, a cashier who tries to sell more than is on hand is stopped at the payment step. A **manager** sees an **Authorize & Continue** button to allow the sale anyway (this is recorded). A cashier without permission must remove the item.

Service & Repair work orders F10

If Service & Repair is in use, press `F10` to look up a work order by invoice number, work-order number, or customer, and take payment on its balance right at the register.

Reports (in the back office)

Managers can review activity in the back office under **POS → Reports** and **POS → Sales Analytics**:

Report	What it shows
Sessions	Every shift: cashier, open/close times, opening & closing float, sales count and total, number of cash movements. Filter by cashier, status, and date. Export to Excel. Click into a session for its full tender breakdown and cash reconciliation.
Cash Movements	Every drop, pickup, pay-in and pay-out, colour-coded by direction, with reason and reference. Filter by kind, cashier, and date. Export to Excel.
Daily Summary	Day-by-day sale count, sales, refunds, net, and sessions opened/closed, with a range total. Export to Excel.
Sales Analytics	At-a-glance cards (sales, gross, tax collected, average ticket), a daily-gross trend line, and your top-selling SKUs. Filter by date range (7–90 days) and store.

12. Administrator settings reference

Store administrators configure the register in the back office under **POS → Settings** (`/admin/POS/admin/settings/index`). Below is what each control does. Hardware pairing and first-time installation are in the companion *Setup Guide*.

Turning POS on

- **POS Module Enabled** — the master switch. Off by default; nothing works at `/pos/` until it's on.
- **Stores** — pick which store locations can use the register. At least one is required.

Tax

- **Override Real-Time Tax Quoting** — off by default (the system quotes live tax automatically). Turn on to charge a single flat rate instead.
- **Default Tax Rate (%)** — the flat rate used when the override is on.

Card processing fee

- **Add a Card Processing Fee** — off by default. When on, card payments carry a recovery fee (cash/check never do).
- **Percent of the Card Amount (%)** — default **2.9**.
- **Fixed Amount per Card Payment ($)** — default **0.30**.

Payment methods

Setting	Default	What it does
Cash	On	Shows the 💵 Cash button.
Credit / Debit Card	On	Shows the 💳 Credit / Debit button.
Check	Off	Shows the 📝 Check button.
Split Payment	Off	Shows the ⚡ Split button for combining tenders.
Manual Card Entry	Off	Lets cashiers key a card by hand (secure entry) when no reader is connected.
Require Customer for Manual Entry	On	Forces a real customer on keyed card sales (chargeback protection).
Save Card on File	Off	Shows saved-card buttons and the "save card" option for attached customers.

Register policy & shifts

Setting	Default	What it does
Use cashier shifts	On	Requires opening a shift before selling.
Require a drawer count at shift open	On	Forces entering the opening float.
Let cashiers void their own sales	Off	Allows a cashier to void their own sales within their open shift; otherwise voids need a manager.
Prevent selling out-of-stock items	On	Stops a sale that exceeds stock on hand; a manager can override.
Require cashiers to be assigned to a store	Off	Cashiers must be assigned a store (see Staff & Store Access) before the register binds.

Catalogue & appearance

- **Price Level** — which price list the register uses (defaults to the same as your website).
- **Product Statuses** — which product statuses cashiers can find (default: Sellable + Active).
- **POS Categories** — limit search to certain categories (empty = all).
- **Maximum Search Results** — tune for catalogue size (default 200).
- **Image Tags** — which gallery images show in the product detail view.

- **Quick Key SKUs** — up to 24 one-tap product buttons.
- **Receipt Header / Footer** — custom text top and bottom of the receipt (footer defaults to *"Thank you for your business!"*).

Tipping & cash drawer

- **Enable Tipping** (off) and **Tip Presets** (default 15, 18, 20%).
- **Enable Drawer Kick** (off), **Drawer Agent URL**, and **Auto-kick on cash sales** (on) — see the Setup Guide for the drawer hardware.

Staff & store access

Under **POS → Staff & Store Access**, give each employee a POS role and (in multi-store setups) the stores they can work at plus a home store:

Role	Can do
POS Cashier	Ring up sales and take payment.
POS Manager	Everything a cashier can, plus void sales, approve oversells, and view reports & analytics.
POS Admin	Everything a manager can, plus manage card readers, settings, and staff access.

A role change takes effect the next time that person signs in to the register. Someone with no role has no register access.

13. Keyboard shortcut card

Key	Action	Key	Action
F1	New order	F7	Hold current order
F2	Customer tab	F8	Recall held order
F3	Product search	F9	Find previous order (refund)
F4	Pay	F10	Work orders (Service & Repair)
F5	Discount	Del	Void selected item
F6	Order note	Esc	Close / cancel
Enter Search / confirm / complete payment		↑ ↓ Move through search results	

Tip: The barcode scanner works on any screen with the Products tab open — there's no need to click the search box first.