
Your Personal

Shopify POS Quick Reference Guide



Congratulations!

**You're now up and running on
Shopify POS!**

**We've partnered with Shopify to help
you and your business grow.**

**This introductory guide will teach
you the ins and outs of Shopify POS.
We're looking forward to watching
your business thrive.**

Setting up your Shopify POS

POS admin dashboard

To get started, head over to your Shopify admin dashboard. From here you can:

- Add products
- Customize your POS receipts
- Update your inventory
- View reports
- View gift cards
- Integrate a variety of apps (Quickbooks, etc.)

For more information:

bit.ly/shopify-pos-admin

Payment gateways

You can use Shopify Payments as your gateway if you're in Canada or the USA. Otherwise, you can use the external credit card terminal of your choice.

Configure your payment gateways:

bit.ly/shopify-payment-gateways

Staff members

The Staff Settings screen is where you can give each staff member a unique four-digit passcode to access and use Shopify POS to check out customers.

Manage staff members accounts:

bit.ly/shopify-staff

Cash register

The Cash Register settings screen lets you choose whether to open/close shifts between different staff, track total sales for each payment type, and track the cash float that each shift starts/ends with.

Configure your cash register:

bit.ly/shopify-cash-register

Fulfillment

You can decide whether to manually mark orders as fulfilled after payment has been received, or automate this process.

Configure fulfillment preferences:

bit.ly/shopify-fulfillment

Receipts

Customize the header and footer of your receipts:

bit.ly/shopify-edit-receipts

Locations

If you operate Shopify POS at more than one address, you can assign each location to a different iPad.

Assign an iPad to a specific location:

bit.ly/shopify-locations

Auto-lock screen

Decide when you want your POS screen to auto-lock after inactivity.

Lock the screen after a specified period of inactivity:

bit.ly/shopify-auto-lock

Taxes

When your shop is first created, Shopify sets up some default tax rates for your own country (and its provinces, states, or territories if applicable). They do their best to keep the default tax rates up to date, but you should double-check to make sure they're current and correct.

Manage your taxes:

bit.ly/shopify-taxes

Managing your products

Your POS products screen

On the Products screen, you can view your products in a simple, functional product grid. Easily navigate through them by swiping the screen, or choose a new collection by tapping on “All products” and selecting a new collection. Can’t find the product you’re looking for? Try the search button and type in a specific product name or SKU.

For more information:

bit.ly/shopify-pos-products

Adding products

Shopify keeps track of all your products and their inventory on your products page.

Add a product to your store:

bit.ly/shopify-products

Add a product to your cart:

bit.ly/shopify-add-product-cart

Product variants

A product variant is a variation of a product in your store, with differences based on elements such as size, colour or material. Let’s say you have a store that sells t-shirts. You create an original product called “t-shirt,” and product variants allow you to advertise the different colors and sizes your t-shirt comes in.

Add a product variant:

bit.ly/shopify-variants

Collections

A collection is any group of products (chosen by you) with some feature in common that customers might look for when visiting your store.

For more information:

bit.ly/shopify-collections

POS hardware

Prerequisites

To set up set up a Shopify POS system, you'll need:

- an iPad to run the Shopify POS app
- a WiFi internet connection for your iPad to join (an iPad with a cellular phone will also work)

iPad stand

Mount your iPad in a dedicated stand to enable easier viewing and interaction for you and your customers.

Buy an iPad stand:
bit.ly/shopify-stand

Card reader

Entering your customers' card numbers manually causes slightly higher transaction rates. To benefit from lower rates, use our secure card reader when you take credit card payments.

Buy a card reader:
bit.ly/shopify-card-reader

Cash drawer

Unless you process only cashless payments, you'll need a secure and reliable cash drawer for your Shopify POS system.

Buy a cash drawer:
bit.ly/shopify-drawer

Receipt printer

Provide your customers printed receipts.

Buy a printer:
bit.ly/shopify-buy-printer

Wifi extender

Extend your range and mobility with the Apple Airport wifi extender.

Setting up the Apple AirPort WiFi Extender:
bit.ly/shopify-wifi

Making the sale!

Processing orders

On the Orders screen you can review order details, refund orders, and complete partial payments. Can't find the order you're looking for? Use the search field to locate an order by ID or customer name.

Complete, update, and refund orders:
bit.ly/shopify-pos-orders

Working with gift cards

As soon as you've enabled Gift Cards in your store's Admin, you can start selling and redeeming them in Shopify POS.

Sell, redeem, refund, and replace gift cards:
bit.ly/shopify-gift-cards

Adding discounts

When using your POS to process an order, you have a few different discounting options. You will need to be on the Cart screen, and then you can choose to add discounts to a specific product or to the total order.

Add a discount code:
bit.ly/shopify-discount-codes

Receipts

With Shopify POS, you have the option to print out your customer's receipt, email it to them after the sale, or both!

Print or email your receipts:
bit.ly/shopify-receipts

Manage your customers

Shopify keeps track of all your store's customers. In the Customers area of your admin, you can:

- Search and filter your customers
- Save frequently done searches
- Edit customer details
- Export/Import a CSV file of your customers
- Manually add a customer to your store

Keep track of your customers:
bit.ly/shopify-customers

Shopify Offerings

What's next?

Now that you're familiar with how Shopify POS works, you might want to know about these other great offerings from Shopify.

Selling online 24/7

While your physical store may have closing hours, your online store is a way to sell your products to your customers 24/7! Once you have your products set up on Shopify POS, migrating them over to an online store is super easy. Both your online store and physical store can share inventory and reports with seamless integration.

Learn more about opening your Shopify online store: bit.ly/shopify-online

Selling on the go

Shopify Mobile is the best tool to help you manage your business at a craft sale, trade show or farmer's market. You can view customers' information and review orders and products – all from your smart-phone. Fulfilling online orders, capturing online payments, and tracking inventory is easy with Shopify Mobile.

Learn more about Shopify Mobile: bit.ly/shopify-go

High-volume sales

Shopify Plus is a white-glove ecommerce solution for emerging brands and high-volume businesses. It offers you an additional layer of expertise on top of Shopify's service, stability and uptime you already rely on. Plus provides the enhanced features and support that your expanding business needs.

Learn more about Shopify Plus: bit.ly/shopify-plus

Resources

Shopify Docs

For support on any of these topics and dozens more.

bit.ly/shopify-docs

Shopify Blog

Daily posts with ecommerce expertise.

bit.ly/shopify-blog

Ecommerce University

Free tools and resources to accelerate your skills and success.

bit.ly/shopify-university

Social Media

Follow us for updates, inspiration, and tips on making the most of your Shopify store.

bit.ly/shopify-twitter

bit.ly/shopify-facebook

bit.ly/shopify-linkedin

Shopify Support

Contact a Shopify Guru for support:

support@shopify.com

1-888-329-0139

Steve Martin

Be so good
they can't
ignore you ”

