

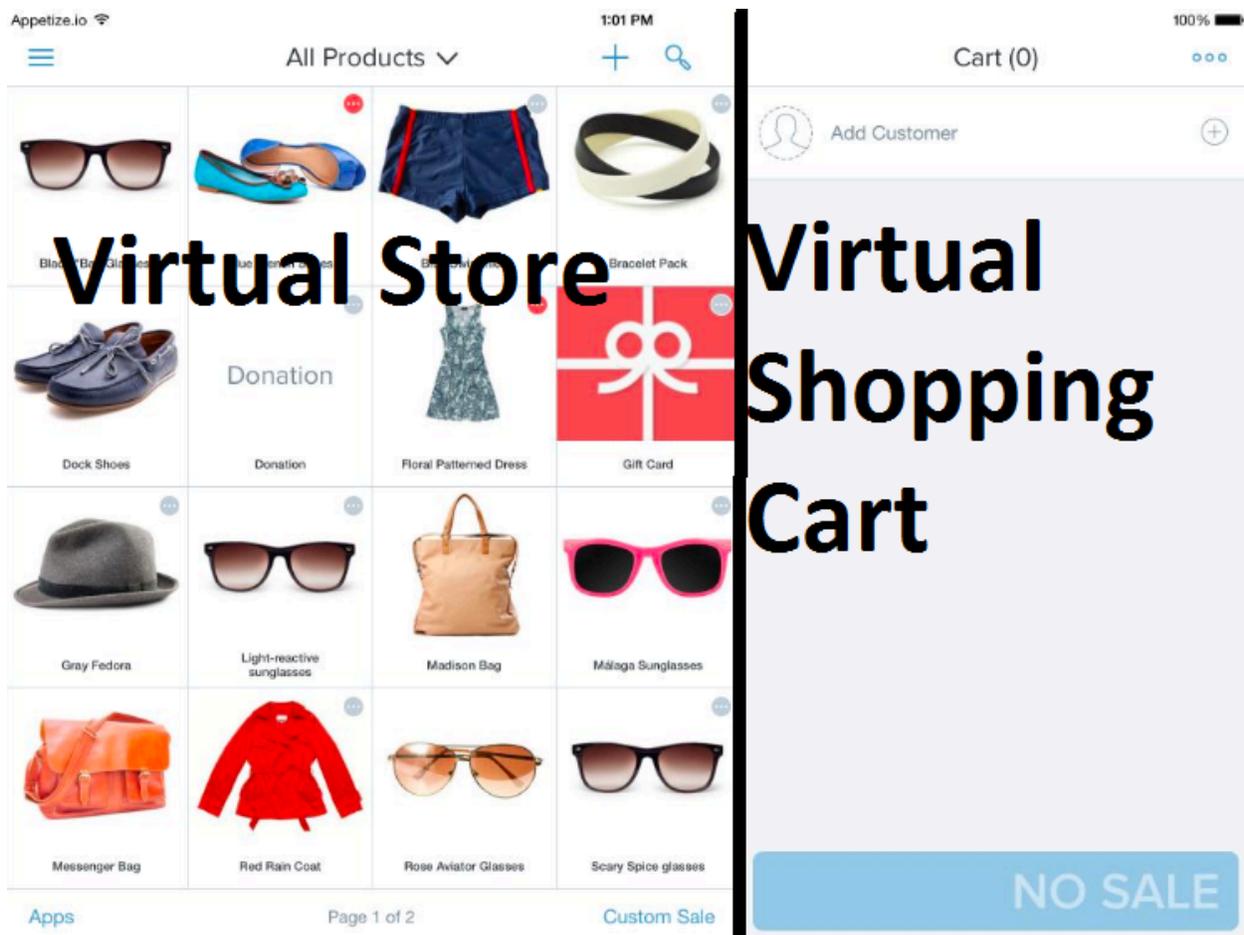
Shopify POS Guide

The Basics

To get into the main Shopify checkout page from a locked iPad, follow these steps:

1. Sign into the iPad
 - a. Code is 1-2-3-4
2. Click the Shopify app, and sign in
 - a. Codes are located at the top of the iPad; either 2-0-0-0 or 2-0-0-1

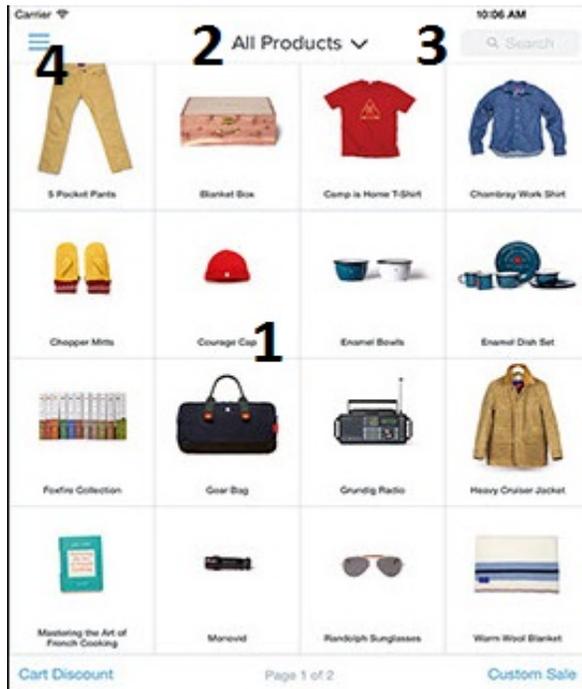
Now you are looking at the main screen for the Shopify POS (Point of Sale) system. The best way to think of the Shopify checkout screen is to view it in two separate parts; the screen on the left is the “virtual store,” whereas the screen on the right is the “virtual shopping cart.”



Understanding the difference between these two screens is key to making quick sales.

The Virtual Store

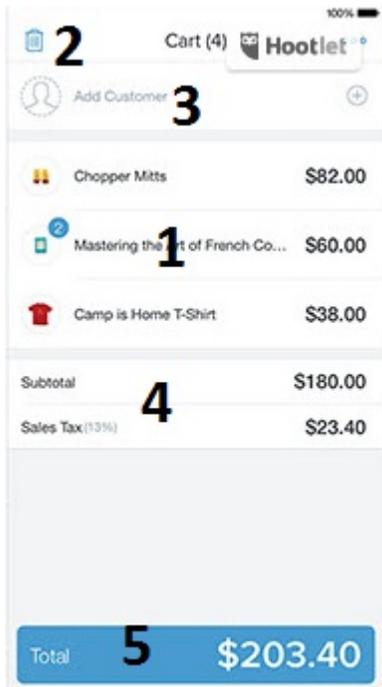
There are many moving parts that comprise the Virtual Store section of the Shopify POS.



1. This section holds all the products available to sell. Tap one of the squares to add that product to the cart. Tap multiple times to add multiples of that item into the cart. Hold down on a product to get further information on it.
2. The “All Products” button at the top can be pressed to show a drop down menu with different categories of sale. For example, our drop down menu has categories such as museum tickets, memberships, décor, accessories, etc.
3. The magnifying glass, or search bar at the top, allows you to search for individual products. This is the most recommended way to search for products, instead of swiping through multiple pages of product.
4. The three bar button in the top left opens the Shopify menu. From here, you can select Checkout (where you sell products), Orders (review past sales/make refunds), apps, and settings. As a volunteer at Cascadia Art Museum, you will only have to work within the Checkout tab. Nate will assist when it comes to the orders tab.

The Virtual Shopping Cart

The Virtual Shopping Cart is also comprised of multiple sections.

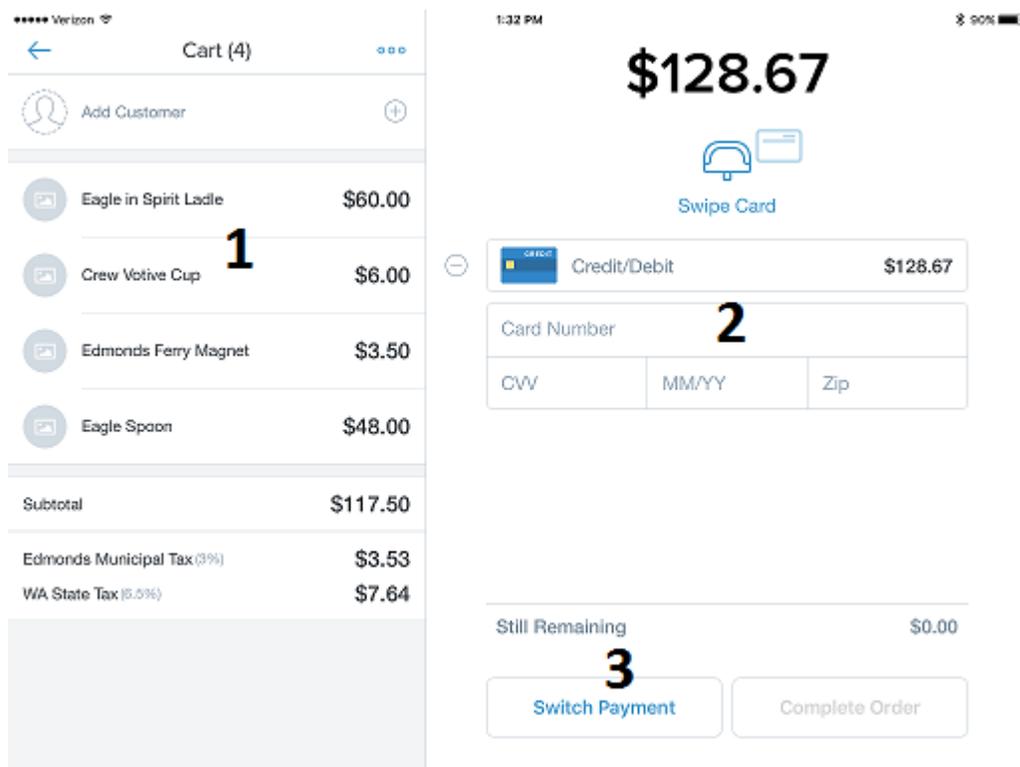


1. These are the actual items placed in the cart for sale. Here, you can tap on an item to adjust the quantity for sale. By tapping the + or – buttons that appear after tapping the item, the quantity to be sold will change. You can also apply a discount to that item individually, by tapping the discount button below the quantity adjustment and applying the appropriate percentage/dollar amount.
2. The trash can icon at the top gets rid of everything in your cart. By tapping this button, all items in the cart will be removed and you will have to search for them all over again, so caution is advised.
3. The “Add Customer” button is rarely used, but in some cases is helpful for recording frequent customer information. To add a customer, tap the + button on the right, tap “Create Customer” at the top of the new popped up window, and input all pertinent information.
4. On Cascadia Art Museum’s Shopify, this section houses the “Add Cart Discount” button, the Subtotal, the “Add Shipping” button, and the “Add Tax” button.
 - a. Add Cart Discount button
 - i. All members get 10% off of their purchases. This is an easy way (when we have no other discounts going on in the store) to apply the members discount. With other items on sale, such as 50% off of Holiday cards, discounts will need to be applied to each item individually, so as not to over discount our items.
 - b. Subtotal
 - i. This shows the total of all items in the cart before applying any tax rates.
 - c. Add Shipping
 - i. Never worry about this button, as we rarely ever ship items, and if we do Nate, Tara or Gwen will handle that sale.
 - d. Tax

- i. When selling an item that is not tickets, memberships, or food, Shopify will automatically attach the tax rates for WA state and Edmonds onto the purchase. If a customer from Oregon (or another state that doesn't have a sales tax) wishes to have the tax remove and presents a valid ID, tap on the taxes applied, then tap the two blue switches to turn off both taxes. This does not transfer over to a new order, so taxes will resume their auto-application.
5. The blue total button shows how much the total charge will be for the sale, including tax. Once you are finished filling the cart with the desired items, tap this button to get to the payment screen.

Payment Screens

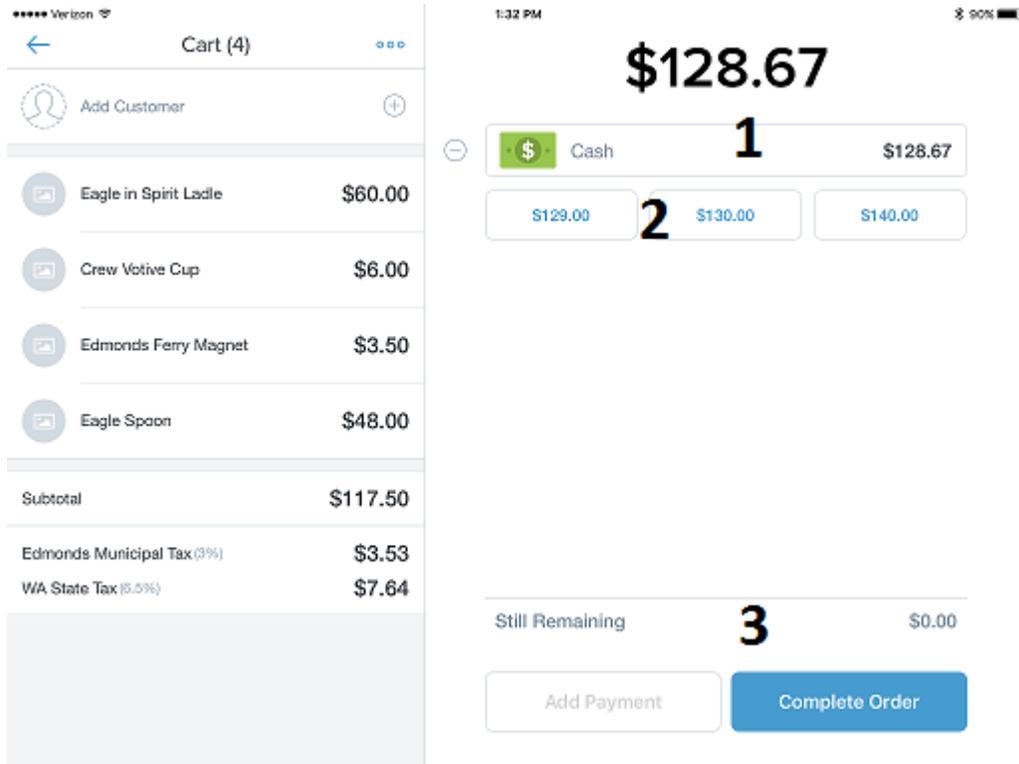
There are two main separate screens that you will be dealing with. We will start with the credit card screen, which automatically comes up first.



1. On the left of the screen is a repeat of the Virtual Shopping Cart. This is just a visual reminder to double check your sales and make sure you've got all the correct information down.
2. This screen indicates a Credit/Debit card sale. At this point, our card readers do not come equip with a keypad for debit purchases, so all charges are made like credit. The black strip of the card must be facing down towards the desk. Once you swipe, it will ask for a customer signature, in which you turn the iPad towards them, slide it across the desk, and offer the stylus for them to sign. They will hit the complete button and you will slide the iPad back to you, hand them their

receipt and assist with bagging needs. It is possible to make orders over the phone by taking card numbers and information, but sales like that should be handled by either Nate or Tara.

3. Customers will either pay with Card or Cash. To switch to the Cash checkout, tap the “Switch Payment” button, then tap the “Cash” button on the popped up window.



1. This bar at the top displays how much cash the customer has given you. The system always assumes the customer has given you exact change, so **It's important to make sure you input exactly how much money they have given you**. If you tap the bar, you can type in how much you were given in exact change.
2. The three blue boxes below the cash bar are suggested amounts. Shopify calculates the most likely payment options, and offers a quick button instead of having to input the total in the cash bar. If the customer has given you an amount that matches one of the blue boxes, just tap those to change the amount in the cash bar.
3. This last section shows either “still Remaining” or “Expected Change.” Still Remaining only applies if they haven't given you enough money, or they are splitting the item between a few friends. You will mostly see Expected Change. Shopify calculates the change for you automatically, so it's important to remember to input how much the customer has given you so you can get the correct change for them.

Making a ticket sale

Our Shopify home screen is set to open on the “Museum Tickets” tab. Below is a step-by-step guide on how to make a ticket sale.

1. On the virtual store tab under “Museum Tickets,” tap as many tickets to be sold (for example, if you have two seniors buying tickets to see the show, you would tap the senior ticket button twice)
2. On the virtual cart side of the screen, review the order to make sure the right amount of tickets is being sold, then hit the blue total button at the bottom.
3. If the customer is paying with a credit card, you will swipe their card and turn the iPad towards the customer so that they can sign. If they are paying with cash, tap the “Switch Payment” button in the bottom center of the screen, and select “cash”
 - a. For the cash sales, it is important to fill in the amount of cash given, so the machine can accurately predict change, as well as letting us know what types of bills the customers are paying with for the most part.
 - b. The blue buttons below the amount screen for cash are possible amounts the customer could have given you. If you see what they gave you as one of those buttons, tap that before completing the order. If you do not see that amount, tap the box above the blue buttons, and fill in the given amount.
4. Complete the order to finalize the sale.
5. **ALL SALES ARE FINAL AT THE CASCADIA ART MUSEUM STORE.** There will be no refunds for any goods sold.

Making a Membership sale

Making a membership sale is very similar to making a ticket sale. However, there are a few things that the customer needs to fill out for us to accurately track when they joined and at what level. Below is a step by step guide on how to sell a membership.

1. Grab one of the information sheets from the white box below the desk, for the customer to fill out their own information.
 - a. NOTE: the section at the bottom of the information sheet is for YOU to fill out. Make sure you don’t miss this section, as it is important for sending membership cards to new members.
2. While the customer is filling out the form, you can sell the membership as you would sell a ticket. It is easier to find members in our system if the customer pays with a card, but paying with cash is just as acceptable.
3. Once the sale has been made, and if we have the supply, the customer should receive a temporary membership card in lieu of the plastic membership card, which will be mailed to their address at a future date.
 - a. In some cases, we will have extra print-out invitations that can be handed to customers who become members on the spot. This will be given alongside the temporary membership card.

Apply a Discount

At various times, items in the store will be on sale. Below is a step by step guide on how to apply a discount.

1. Add items into the cart like a normal sale.
2. Select the item to be discounted by tapping on it in the cart.
3. A box will come up, showing a number with a – and + on either side, the word *discount* below, and further down the taxes applied to that item. Tap the box that says *discount*.
4. The next window that opens up gives the option to apply the discount in dollars or as a percent. The only time the dollar discount should be used is when patrons buy tickets to see the show and decide they love it so much they want to become members. The price of the tickets is then discounted from the membership sale.
5. With the % button selected, tap the discount amount (usually 25% or 50%), then tap the *Done* button.
6. You will now notice the discount applies to that item individually. To apply a discount to the entire cart (like for a members' purchase), you tap the *add cart discount* button in the cart. This discount will apply to the entire cart.

Non-Shopify store procedures

This section will cover the aspects of the museum store that don't have to do with the Shopify system.

Keeping Visitor Count

Keeping count of how many visitors go into the museum space is important for our administration to know slow days and hours, so we can more appropriately plan events and tours. Below is a bullet list of what to do to keep track of visitors to the museum.

1. A silver click counter is kept on the front desk near the monitor system.
2. Whenever a visitor goes into the museum space (a member showing their cards, visitors buying tickets, visitors giving complimentary passes) the clicker should be clicked for each person. This is **only if they go into the museum space; we are not counting visitors into the gift shop.**
3. At the top of each hour, the desk attendant will take the blue folder from the middle shelf in the cabinet to the left of the first iPad, fill out their name in the left column, and input the number of guests for that hour in the right column.
 - a. Each day is denoted at the bottom of the table, by day and date. Make sure you are filling out the information for the correct date.
4. Replace the folder on the middle shelf in the cabinet.

Wrapping delicate products

Some of the products in the store are delicate, and prone to damage (for example, the votive Cups, consignment glassware, small glass sculptures, etc.). For these items, the blue tissue paper under the wooden portion of the desk is perfect for protecting these items. Wrap the item in tissue paper, and seal with the Cascadia Art Museum sticker found in the same location as the tissue paper.

Changing the receipt roll

The receipt machine will start blinking red when it's close to empty. To change the roll, pull the lever on the right of the machine to open the main compartment. Remove the almost empty roll and its center (black cylinder). Place a new receipt roll (found in the third lowest drawer next to the front iPad) in the machine. Pull the paper out a little so you can close the compartment lid on it. Make sure the white side of the roll is facing you, while the side with writing is facing towards the machine. Close the lid. The receipt machine will feed a little of the roll out, auto adjusting itself. After that, it's all set for use.

Items with boxes

A few types of items (Jewelry, Charlie Harper Birds) have boxes stored away that should be sold with the item. The Charlie Harper Bird boxes are stored in the back stock room, and have images of the right bird on the box. The jewelry containers are stored near the secondary iPad, on a shelf in a black box. These containers are separated by vendor, so make sure you know which consignment artist made the piece you're selling.

Requests for Donations

If individuals come in requesting a donation for their organization, school, non-profit, etc. follow these steps:

- Cheerfully take their donations request paperwork
- Say that you are happy to pass it along to Tara (our event planner, usually in Wednesday – Friday)
- Mention that we do normally grant donation requests with complimentary passes (don't guarantee or promise anything – but the reality is that we will probably honor the request)
- Say that Tara will get in touch with them with an email or phone call – so make sure that information is clear

Under-counter organization

Underneath the counter facing the entry doors, you will notice a file system in place. From right to left, here is how the under-counter is organized:

- White box
 - Inside this box are blank membership cards, and the small forms the customer must fill out for our data.
- File system
 - The first file slot on the right has a clipboard in it. This clipboard is updated each week with new product in the store. **Make sure you take a look at this each time you come in, to make sure you know what we have to offer.**
 - The next slot is for outgoing mail. This can contain gift memberships/admissions, completed donation packets to be picked up, or important mail for key volunteers such as Ann Wood or Jim Clark.
 - The next slot to the left is the inbox. Here, donation request forms can be placed. This is also a good location for business cards or advertising requests to go.

- The farthest slot on the left is any phone messages or questions for Nate. He checks this regularly, so most questions and concerns will be answered within the day.
- Brochure storage
 - Here, organized piles of brochures are stored. They will change as the show changes, but this is the first place to look for extra information for visitors.

What to do in your down time

There will be times while on duty when not many customers come in. In these times, check the list of things to do in the drawer with important files at the front desk. Such activities include:

- Dusting the shop area
- Cleaning the glass doors of fingerprints and smudges
- Dry mopping the floor
- Cloroxing the front counters

If you run into any complications at the front of the store, contact Nate, and he will assist.