

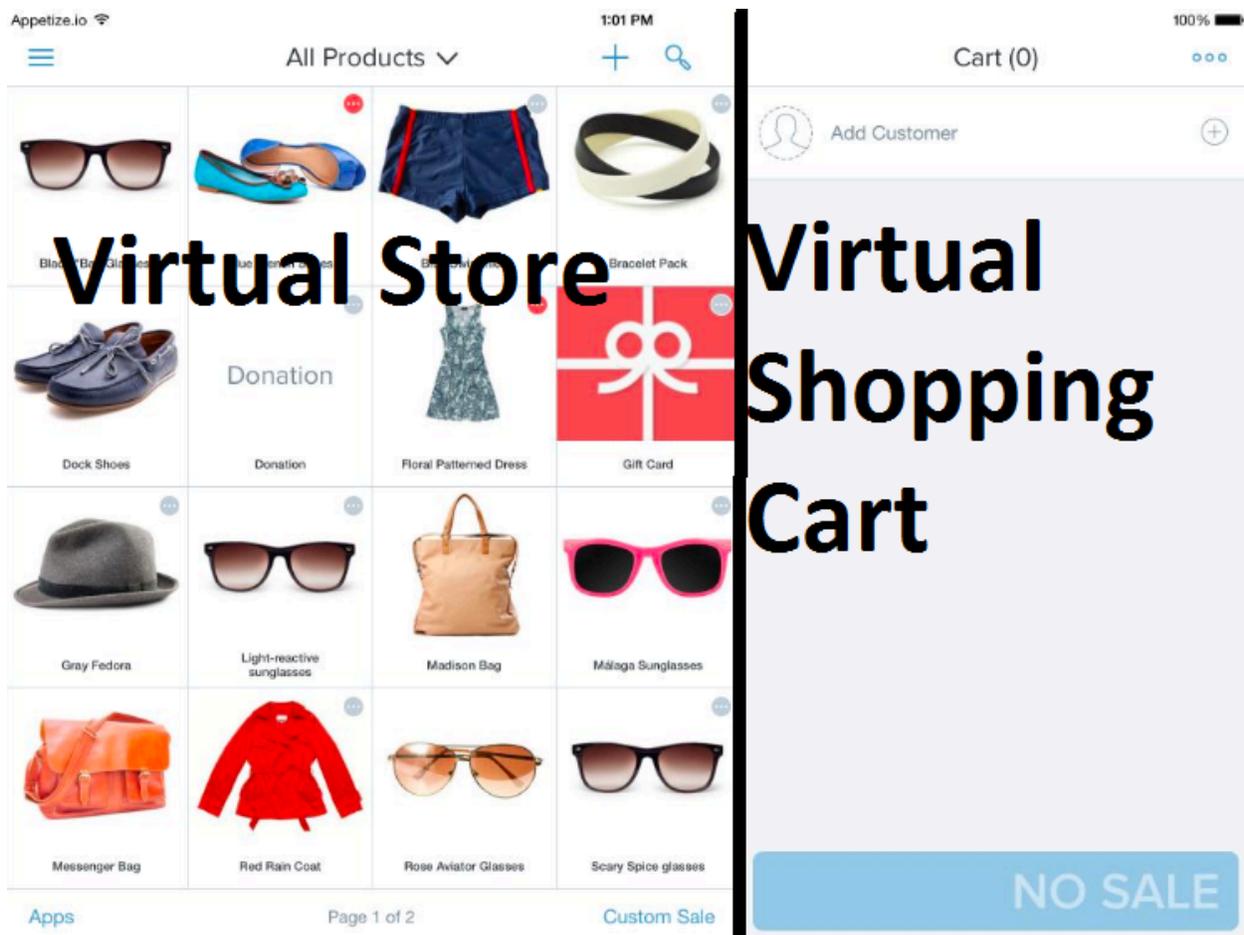
Shopify POS Guide

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

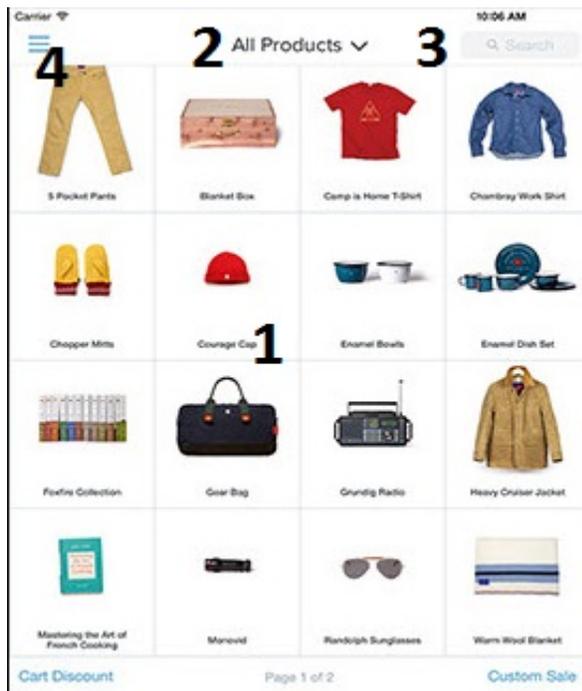
Now you are looking at the main screen for the Shopify POS (Point of Sale) system. The best way to think of the Shopify checkout screen is to view it in two separate parts; the screen on the left is the “virtual store,” whereas the screen on the right is the “virtual shopping cart.”



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

The Virtual Store

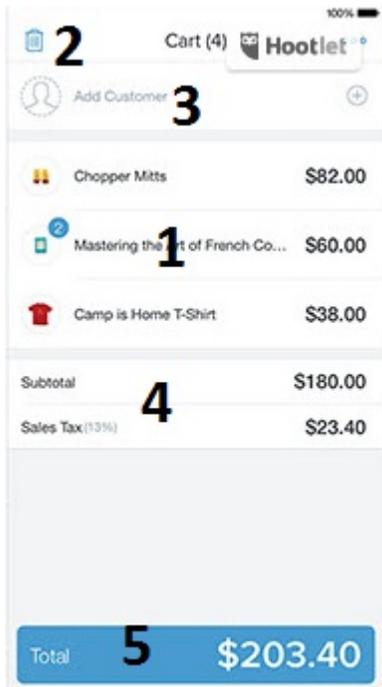
There are many moving parts that comprise the Virtual Store section of the Shopify POS.



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.

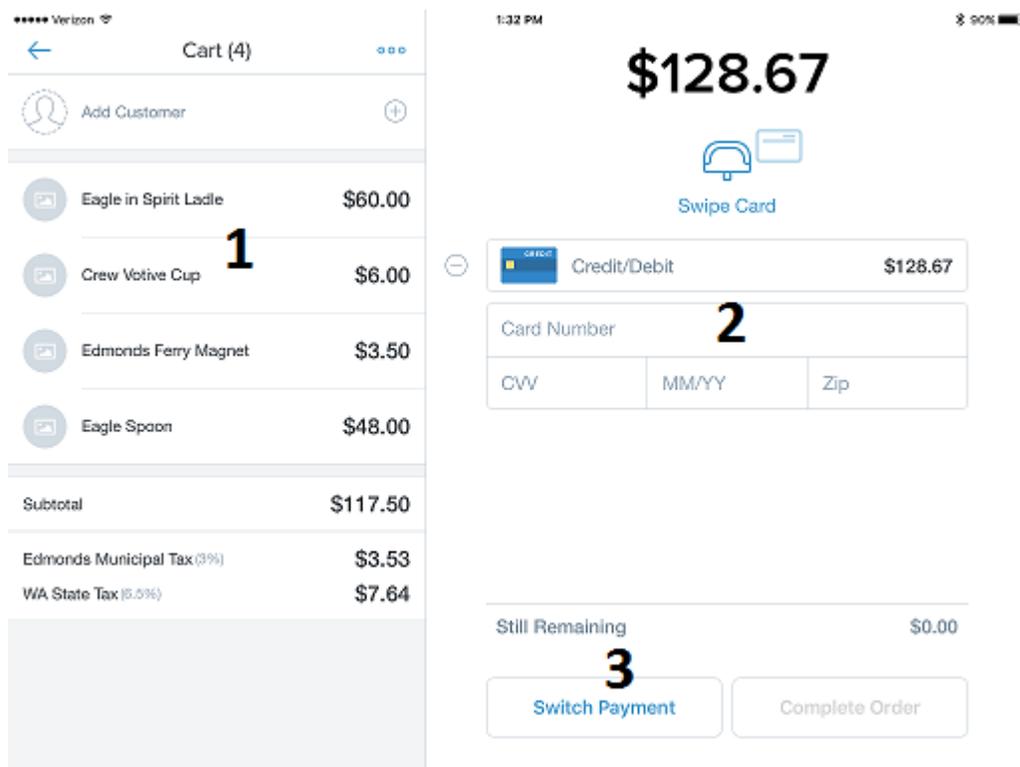


1. These are the actual items placed in the cart for sale. Here, you can tap on an item to adjust the quantity for sale. By tapping the + or – buttons that appear after tapping the item, the quantity to be sold will change. You can also apply a discount to that item individually, by tapping the discount 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

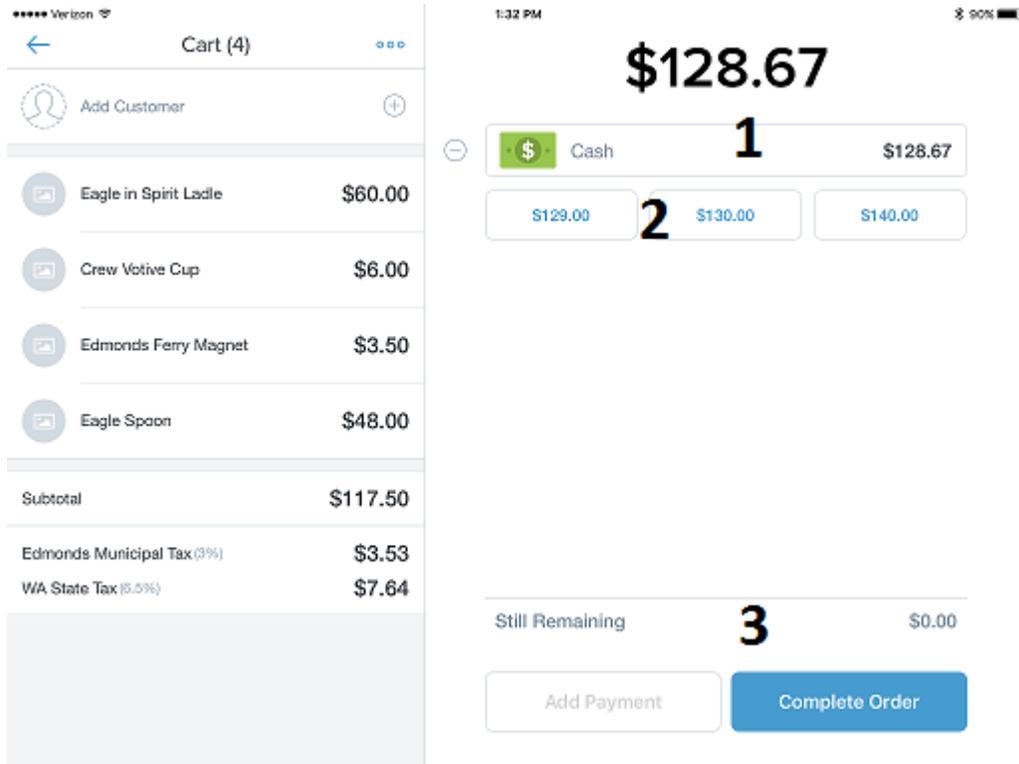
There are two main separate screens that you will be dealing with. We will start with the credit card screen, which automatically comes up first.



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 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.