# SHOPIFY POS PRO GUIDE

An overview of Shopify's new POS platform, which allows you to have one source of truth for all customer transactions across your online storefront, retail, marketplaces, and more.

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Shopify POS 101

[Shopify](#) is the best-in-class platform for e-commerce, but commerce is everywhere now, and customers shop interchangeably online and in-store. In comes Shopify's new POS platform, allowing you to have one source of truth for all customer data and transactions, creating an online and offline customer experience.
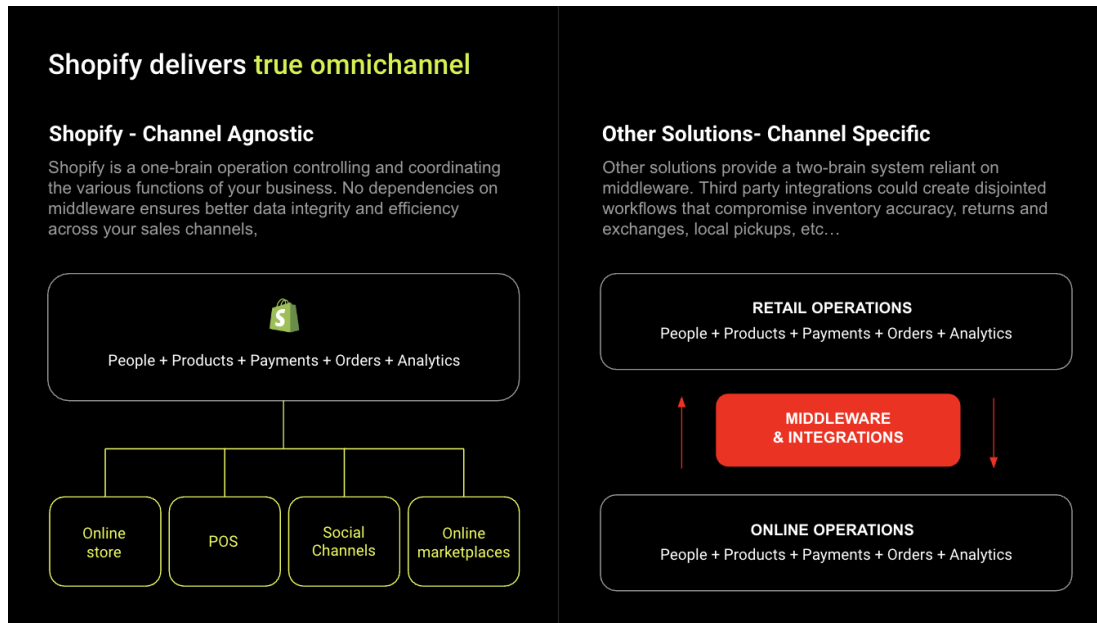
Shopify POS allows you to sell almost anywhere, including brick-and-mortar stores, markets, and pop-up shops. The POS App is available only for iOS and Android devices and syncs with Shopify to track orders and inventory across your retail locations, online store, and other active sales channels. You can also buy additional hardware for your store here.

Setting Up Products

From the product page in your Shopify admin, you must make whichever products you want to sell in your retail store available on the POS Sales channel. This is the same area where you can activate products for sale on marketplaces such as TikTok, Facebook, etc.

Location Management

Location management is handled within your Shopify admin, where you can add, delete, edit, and activate/deactivate locations as needed.

Point of Sale Overview

Get a high-level view of how your retail business is performing by analyzing key metrics such as:
- Total sales

- Gross sales
- Total discounts
- Total refunds
- Gross profits
- Gross margin
- Total orders
- Average order value
- Sales by staff attributed to sale

Payment Methods

You can activate a variety of different payment methods in Shopify POS for your customers:
- Cash payments
- Shop Pay Installments
- Gift Card
- Custom payment methods: Checks, store credit, or third-party terminals.

POS Apps

Embedded Apps

You can find all available POS-embedded apps in the <u>Shopify App Store here</u>.

To access your most used apps from your Home screen, you can add them as tiles in the smart grid, allowing you to access them from the cart. Apps in the smart grid can also display relevant information for your staff to use when selling. For example, how many loyalty points does the customer have with loyalty apps.

UI Extensions Apps

POS UI Extensions are a way to use apps to enhance your retail experience.

Training your Team

Shopify provides a robust training checklist to help you get your staff up and running on Shopify POS.

Shopify POS functionality

- ☐ Using the smart grid
- ☐ Using global search
- ☐ Switching users
- ☐ Changing and updating settings
- ☐ Using apps

Inventory and locations

- ☐ Checking product inventory
- ☐ Checking inventory in other locations
- ☐ Selling products when there is no inventory

Customers

- ☐ Searching for customers
- ☐ Adding customers to the cart
- ☐ Opening a customer's order history

Processing sales

- ☐ Adding products to cart
- ☐ Scanning barcode labels
- ☐ Making a custom sale
- ☐ Adding staff to a sale
- ☐ Emailing and printing receipts
- ☐ Emailing carts

Discounts

- ☐ Applying discount codes
- ☐ Applying item-level discounts
- ☐ Applying cart-level discounts
- ☐ Applying multiple line item discounts with cart-level discounts
- ☐ Applying discounts for specific customers (loyalty programs)

Payments

- ☐ Switching between payment types (partial payments)
- ☐ Using external terminals
- ☐ Accepting gift cards and checking gift card balances

Shipping and fulfillment

- ☐ Shipping in-person sales to a customer's home
- ☐ Setting up in-store pickup for online orders
- ☐ Finding where an order was placed (online or in-store)
- ☐ Managing fulfilled and unfulfilled sales

Returns, exchanges, and refunds

- ☐ Returning items
- ☐ Returning to a gift card or store credit
- ☐ Returning an item that was bought online
- ☐ Exchanging items
- ☐ Exchanging multiple items on an order

Hardware

- ☐ Connecting hardware
- ☐ Checking connectivity

Manager training checklist

For your managers if they need additional training:

- ☐ Accessing reports
- ☐ Using register shifts and cash tracking
- ☐ Creating and printing end-of-day reports
- ☐ Getting gift cards for the store
- ☐ Printing barcodes
- ☐ Assigning inventory to locations
- ☐ Reissuing receipts
- ☐ Assigning staff permissions
- ☐ Using the Shopify mobile app

Shopify POS Lite vs Pro

Shopify offers two POS app subscriptions: Shopify POS Lite and Shopify POS Pro. Shopify POS Pro provides a few key features that Shopify POS Lite does not:
- Custom printed receipts
- Automatic discounts
- Retail staff permissions and management
- Unlimited POS-only staff
- Sales attribution
- Exchanges
- Save/retrieve cart
- Ship to home
- Local pickup fulfillment
- Local delivery fulfillment
- Advanced inventory management with Stocky
- Daily sales reports

- In-app retail store analytics

Custom Printed Receipts

Customize the template for your printed receipts with a logo, header, footer, and custom info, and also choose how many receipts you want to print by default.

Automatic Discounts

With POS Pro, you can set up locations to have automatic discounts (i.e., for BFCM).

Retail Staff Permissions and Management

Using POS roles, you can give different staff different permission levels for your store's POS and retail activities. When assigned to each staff member, you can create different POS roles that will determine how much permission they have to do various activities. Shopify POS Pro also allows for unlimited POS-only staff.

Sales Attribution

With POS Pro, you can attribute each sale to a staff member during the checkout process and track your team's performance by using the Retail sales by staff attributed to the sale report. It's necessary if you offer a commission to your staff, but it also gives you insight into which team members are performing better than others.

You can also attribute individual line items from an order to different staff if multiple team members were involved in the sale.

Exchange an Order Item

With POS Pro, you can exchange a returned item for a new item, and if there's a price difference, collect or pay out the difference during the exchange.

Save & Retrieve a Shopify POS Cart

Does your customer need to leave before completing their purchase but wants to come back? Save the cart and then continue with your other orders. When the customer returns, you can retrieve the order on Shopify POS.

Ship to Home

Customers don't want to take their items with them, or the product isn't in stock at the store? With POS Pro, you can process an order in-store to get shipped to your customer's chosen address.

Note: If a customer needs some items shipped and others carried out of the store, you must create two separate transactions.

Local Pickup for Online Orders

On your online storefront, you can set up the options for customers to pick up their orders at your retail store, curbside, or any location you choose. A staff member must verify each pickup order that each line item is in stock, after which you can send a notification to the customer that their order is ready and also print a pickup slip to attach to the order.

Once the customer picks up their order, change the order status in Shopify from unfulfilled to fulfilled.

Local Delivery for Online Orders

From the POS app, you can manage local delivery orders, prepare them for delivery, and update their order statuses.

Inventory Management with Stocky

Stocky lets you manage your inventory, including stock adjustments, stock transfers, label printing, and purchase orders:
- Advanced purchase orders with demand forecasting: Create accurate purchase orders based on sales history and email them to suppliers.
- Seamless inventory transfers between locations: Replenish your retail stores by transferring stock from your warehouse or between store locations.
- Streamlined inventory counts: Keep a tight grip on your inventory levels by performing a barcode or manual inventory count.
- Ready-made performance reports: Track profit margins, best sellers, stock on hand, and more to help improve your stock levels and revenue.

Daily Sales Report

This report compares today's sales to those made the same day last week.

Term	Description
Net sales	Total daily sales minus returns and other deductions.
Average order value	The average $ amount of a customer order.
Items per order	The average # of items in a customer order.
Top products by net sales	Top three product variants.
Top product types by net sales	Top three product types.
Top staff at the register by net sales	Top three performing staff.

Net payments by type	The day's net payments by type.

Get Started with Shopify POS

Omnichannel selling is table stakes, but it's complicated to get it right. Shopify gives you one source of truth to manage your people, products, payments, orders, and analytics across your online storefront, POS, social channels, online marketplaces, and more.

Convert more sales, improve customer relationships, simplify your backend processes, and confidently scale your business with [Shopify](#).

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