The Shop: your team's guide

maxmarket.link · Shop: your online store, POS and stock · November 2026

Watch the lesson, then do the same with this page open. Every lesson ends with something saved that you can find again, and the next lesson starts from it. Lessons 1 to 10 are for the owner, once. Lessons 11 to 19 are your daily work. Lessons 21 to 29 are for when something goes wrong.

Lessons

#	Lesson	For	Min	At the end you will have
1	First sign-in	Owner	2	Account open, first notice read, time zone checked
2	Your team	Owner	2	Staff member Ana can sign in on the Staff role a new store starts with
3	Your store's look	Owner	3	Production's blue #0133fb, name, logo, icon and receipt name saved; Add to cart kept, as on production; Show customers how many are left kept off
4	Your store's address	Owner	1	Store location saved; the store's address found
5	Your aisles	Owner	2	Two categories with sub-categories
6	Your first items	Owner	3	Three items with price, cost, quantity, low stock level and photo
7	Items that come in sizes	Owner	3	A main item with two options, each with its own price and stock
8	See your store	Owner	2	The new items found in the store; the sizes chosen from one card
9	Statuses, payment methods and reasons	Owner	2	Three change reasons added; the seven statuses and three payment methods read
10	Take GCash, Maya and card payments	Owner	2	Online payment on, with the store's own PayMongo test key; Pay now online seen at checkout, marked Test mode
11	How a customer orders	Customer	2	First order placed, cash on delivery
12	See a new order and pick it	Staff	2	The new-order email read; order marked as being picked
13	Deliver and close the order	Staff	2	Order closed; the customer sees it
14	Open your cash shift	Staff	1	A shift open with a ₱1,000 opening float
15	Sell at the POS	Staff	2	First sale at the POS, inside the shift
16	Record new stock	Staff	2	The running-low item restocked; the quantity up
17	The end of the day	Staff, then Owner	2	The shift closed with the counted cash; the day's sales read in the Sales report
18	Show up in Browse stores	Owner	1	The store listed for customers
19	Your orders in the app	Owner	1	An order found by name, opened in Manage store from the list; a line found in Order Items
21	A line changes		1	In this lesson, you change an order: a customer wants less, and an item runs out.

22	A customer cancels		1	In this lesson, a customer cancels an order after you picked it.
23	A delivery comes back		1	In this lesson, a customer refuses a delivery, and the items come back.
24	A POS sale was wrong		1	In this lesson, you correct a POS sale that was rung up wrong.
25	The count does not match		1	In this lesson, you correct your stock when your count does not match the shelf.
26	A price and a promo		1	In this lesson, you change a price and start a promo with an end date.
27	A forgotten password		1	In this lesson, you help a customer who forgot their password.
28	The internet drops		1	In this lesson, the internet drops, and you keep selling.
29	A customer did not finish paying		2	In this lesson, a customer who did not finish paying online pays from her order.

Lesson 1 First sign-in

For Owner · 2 min · video `shop-onboard-01.webm`

At the end you will have: Account open, first notice read, time zone checked

Before you start: Pause the video at any time, and do the same on your screen.

Steps

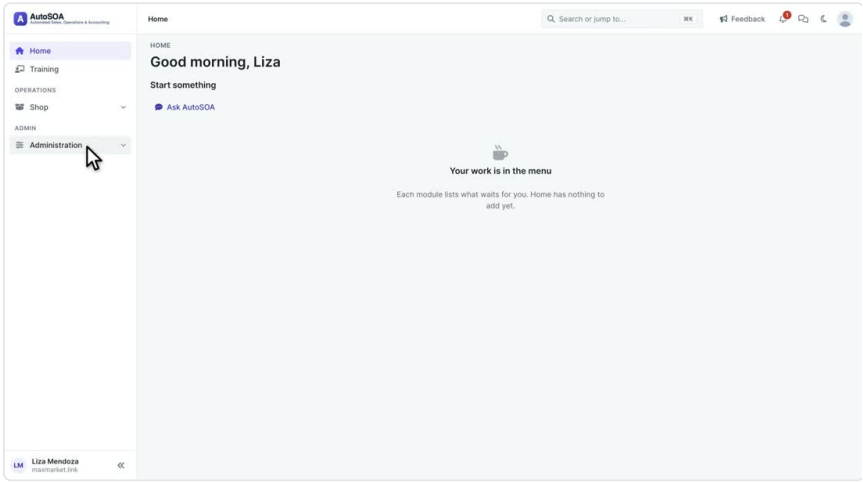
1

AutoSOA sends you a link, a user name and a password. The link opens this page.

Type your user name in User name or email.

Type your password in Password.

Click Log in.

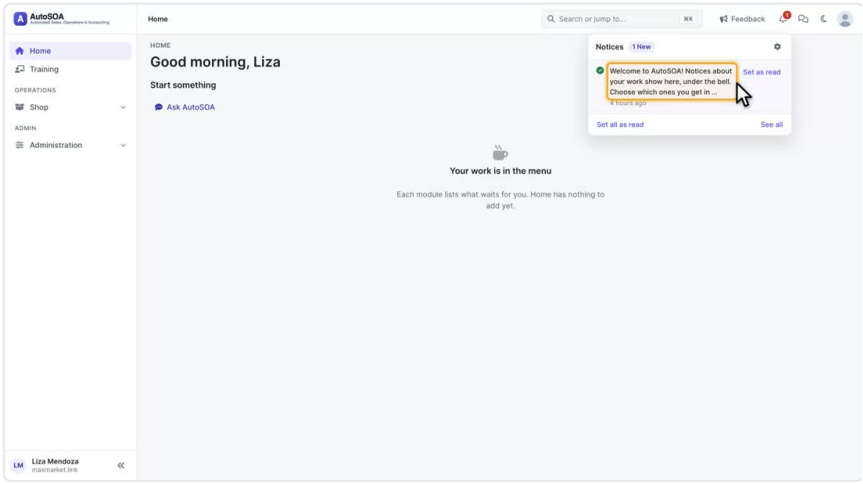


Home opens, and it greets you by name. This is the app. You set up your store here. Shop holds your store: your items, your orders and your look. Administration holds your team and your settings. You run the store from two more places. Manage store is for daily work. The store is what your customers see. You meet both later.

2

The bell at the top shows a red one: one new notice for you.

Click the bell.

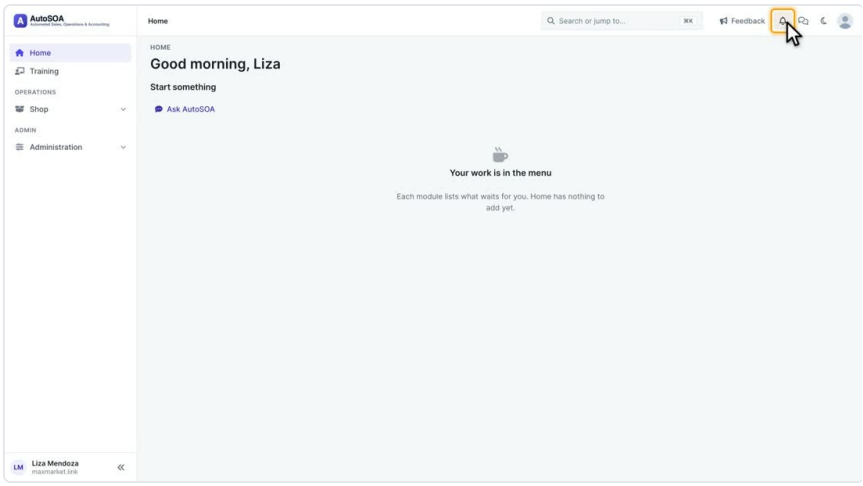


Here is your welcome notice. Notices about your work show here, under the bell.

3

Click Set as read.

Click the bell again, to close it.

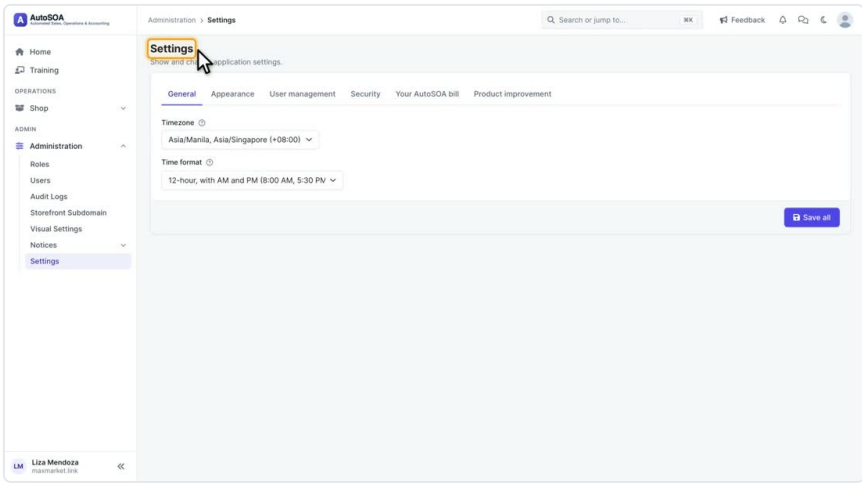


The red one is gone. Nothing new is waiting.

4

Now check your time zone.

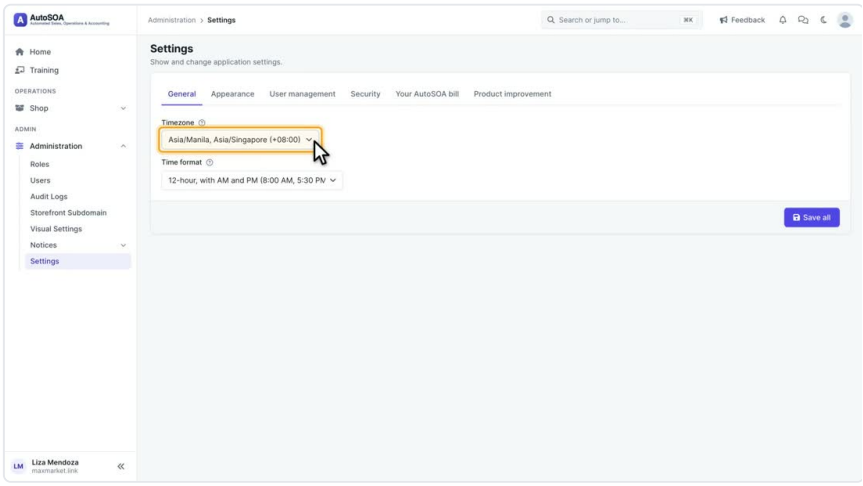
Open Administration, then Settings.



This is Settings. It holds the settings for your whole store.

5

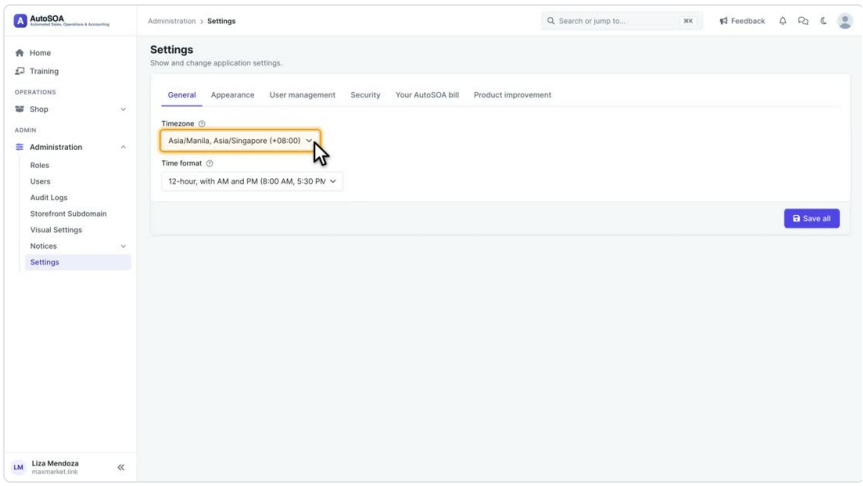
Every order and every sale uses this time zone.



Timezone already shows Asia/Manila. Keep it.

6

Time format decides how a time shows: five thirty PM, or seventeen thirty.



12-hour, with AM and PM, is already chosen. Keep it. Your account is open, and your time zone is right.

You signed in and opened your first notice. You found Shop and Administration, and you checked your time zone. Next, you add a staff member.

Check yourself

▼ Where do you check your time zone?

Open **Administration**, then **Settings**. Look at **Timezone**.

▼ What does the app do, and what does Manage store do?

You set up your store in the app. Your staff do daily work in Manage store.

Lesson 2 Your team

For Owner · 2 min · video `shop-onboard-02.webm`

At the end you will have: Staff member Ana can sign in on the Staff role a new store starts with

Before you start: You need the account you opened in lesson 1.

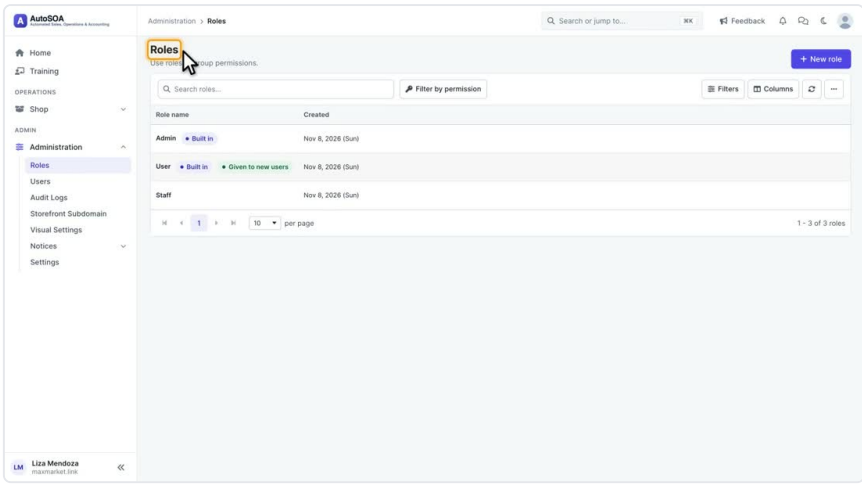
Each person who works in your store signs in as themselves. So you can see who did what.

Steps

1

First, see what your staff can do.

Open Administration, then Roles.



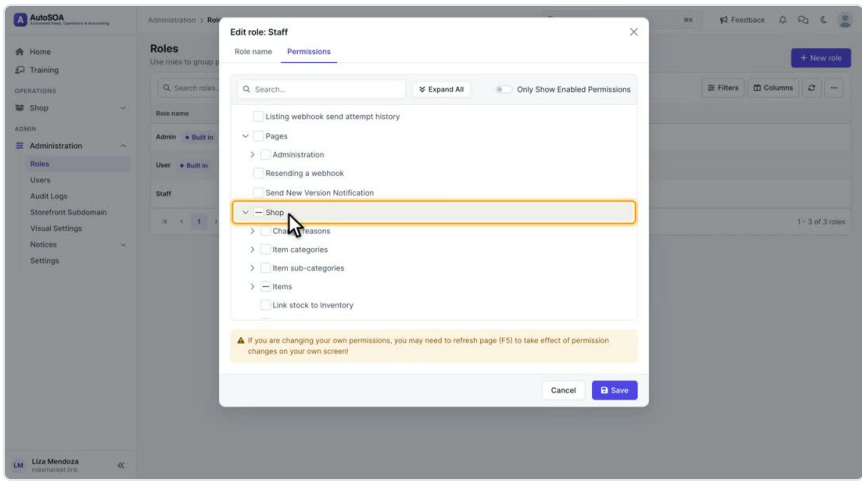
This is Roles. A role is a list of things a person can do.

2

Your store starts with three roles. Admin is for you. User is for your customers. Staff is for the people who work for you.

Click the three dots beside Staff, then click Edit.

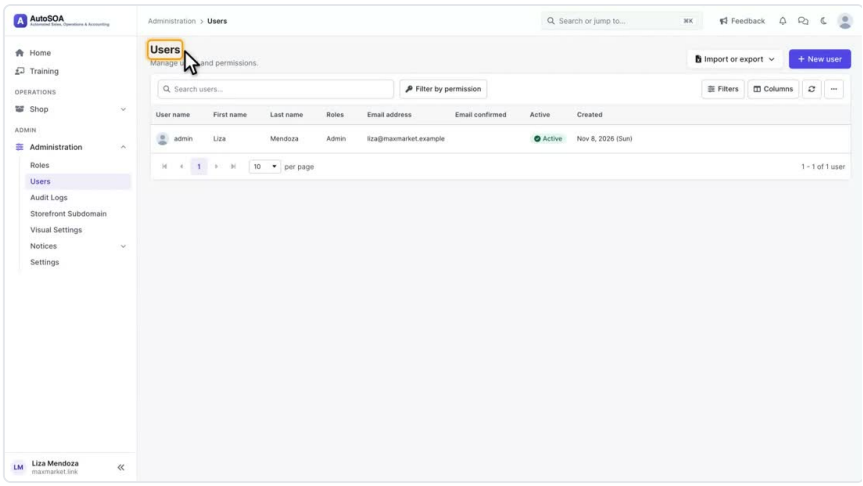
Click Permissions.



A permission is one thing a person may do. The ticks show what this role can do. Staff work with orders, sales and stock.

3

Click Cancel. You keep Staff as it is.



Now add your staff member. Open Administration, then Users. This is Users. It lists everybody who can sign in.

4

Click New user.

Type Ana in First name.

Type Reyes in Last name.

Type her email address in Email address.

Type ana.reyes in User name.

Turn off Set random password.

Type a first password in Password.

Type it again in Password (repeat).

Turn off Should change password on next login.

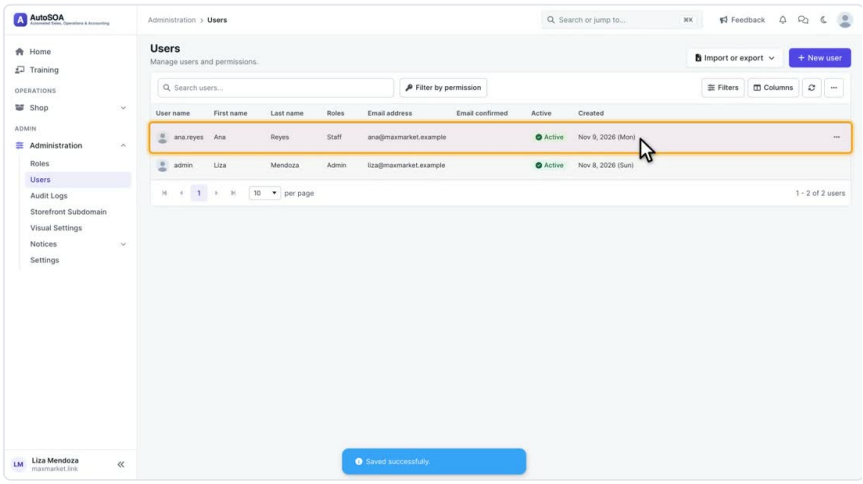
Turn off Send activation email. You tell your staff member the password yourself.

Click Roles.

Turn on Staff.

Turn off User. Ana needs only Staff.

Click Save.



Here is Ana in your list of users, with the role Staff.

You saw what the Staff role can do. Then you added Ana with that role. Next, you give your store its look.

Check yourself

▼ Which role do you give your staff?

Staff. It works with orders, sales and stock, and it cannot change settings or prices.

▼ Why do you turn off **User** for a staff member?

User is the role your customers have. Your staff need only **Staff**.

Lesson 3 Your store's look

For Owner · 3 min · video `shop-onboard-03.webm`

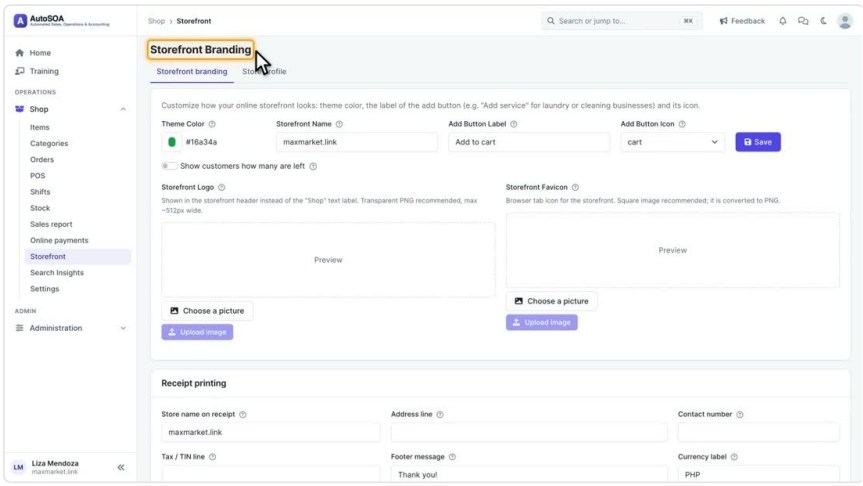
At the end you will have: Production's blue #0133fb, name, logo, icon and receipt name saved; Add to cart kept, as on production; Show customers how many are left kept off

Before you start: You need your logo file, and the small icon for the browser tab.

Steps

1

Open Shop, then Storefront.



This is Storefront Branding. It decides how your store looks to your customers.

2

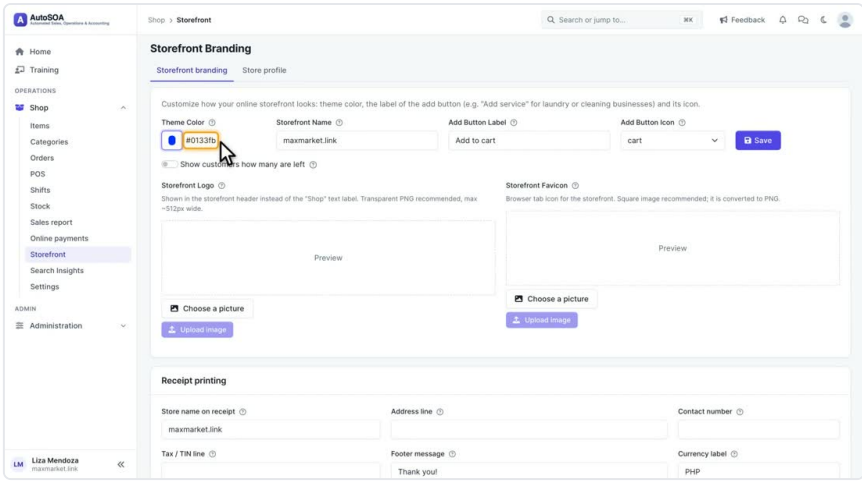
Theme Color is the color of your buttons and links.

Click the color box under Theme Color.

Drag the rainbow bar to blue.

Click a strong blue in the big square.

Click outside the window to close it.



Theme Color now shows your blue.

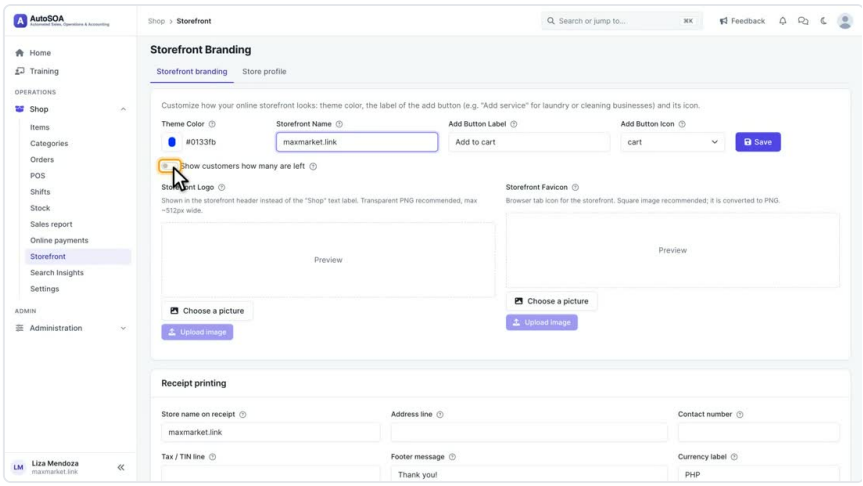
3

Storefront Name shows in the browser tab.

Add Button Label is the word on the button under each item. Add to cart is already there. Keep it.

The switch Show customers how many are left decides what your store says about stock.

Type maxmarket.link in Storefront Name.



It is off, so your customers do not see the number. Keep it off. Your staff always see the number.

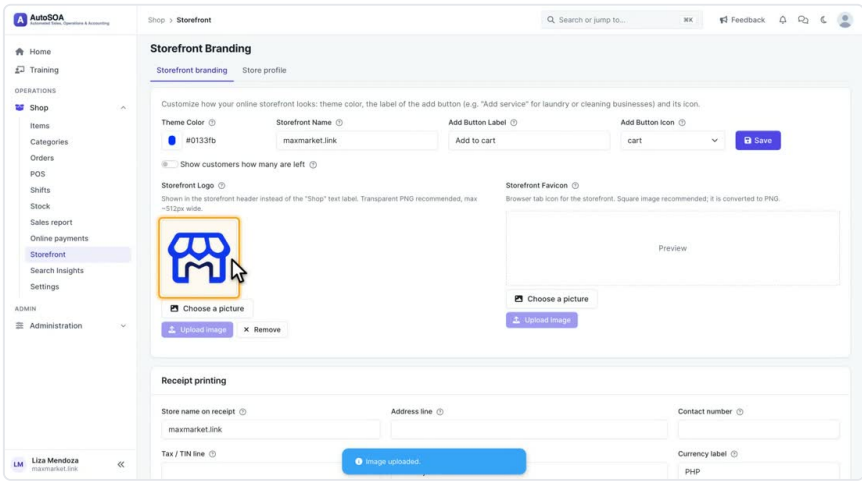
4

Storefront Logo shows at the top of your store.

Click Save.

Click Choose a picture under Storefront Logo, and pick your logo file.

Click Upload image.



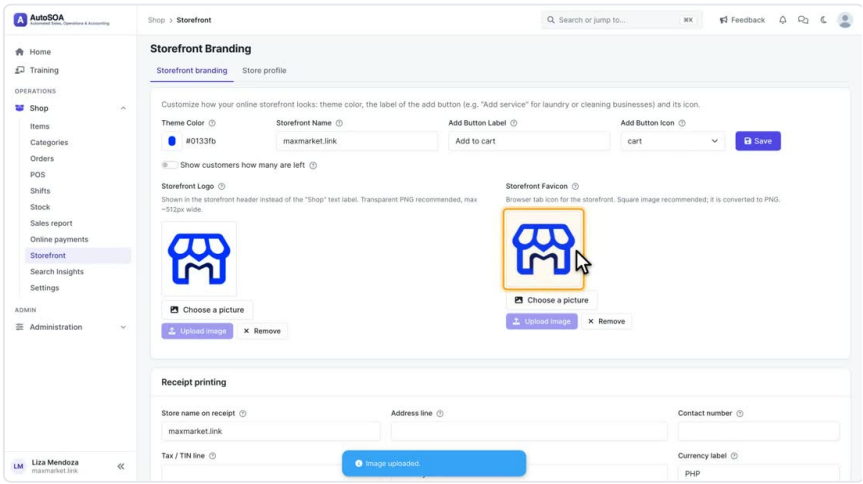
Your logo shows in the preview.

5

Storefront Favicon is the small icon in the browser tab.

Click Choose a picture under Storefront Favicon, and pick your icon file.

Click Upload image.



Your icon shows in the preview.

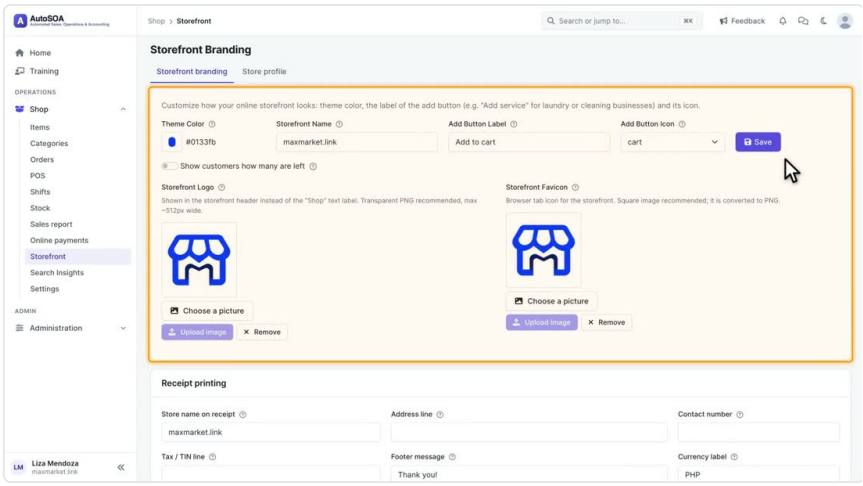
6

Receipt printing decides what your receipts say. Your customers read your store name there.

Click Save again, to keep the pictures.

Type maxmarket.link in Store name on receipt.

Click Save, under Receipt printing.



One more page. Open Administration, then Visual Settings. This is Visual Settings. It changes the color of the app, for you and your staff. Your customers never see it. You can keep it as it is. Here is your look, saved: your color, your name and your logo.

You chose your color and your name. You kept the number left hidden. You added your logo and your icon. You put your name on your receipts. Next, you tell customers where your store is.

Check yourself

▼ Where do you change the color of your store?
Open **Shop**, then **Storefront**, and use **Theme Color**.

▼ What must you do after you pick a logo?
Click **Upload image**, then click **Save**.

▼ Can your customers see how many of an item are left?
Not at the start. They see **In stock** or **Sold out**. To show the number, open **Shop**, then **Storefront**, turn on **Show customers how many are left**, and click **Save**.

Common mistakes

- **The screen says:** This picture is not saved yet. Press Upload image first.
  Do: Click **Upload image** under the picture, then click **Save**.

Lesson 4 Your store's address

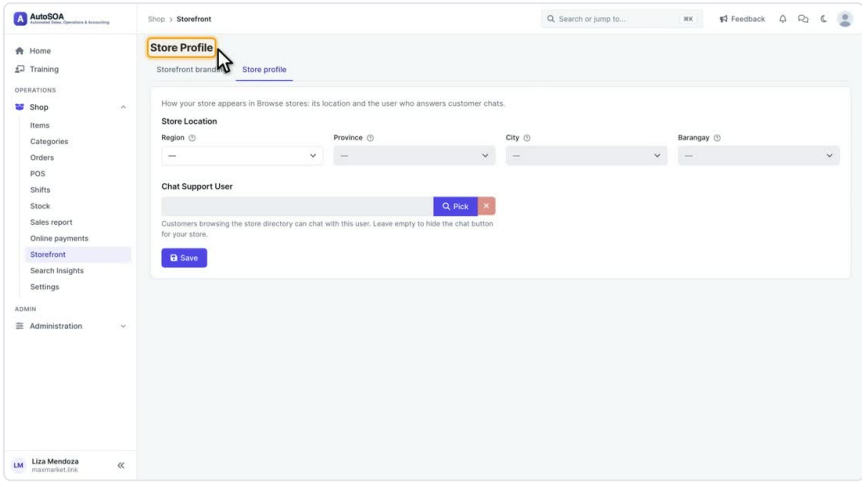
For Owner · 1 min · video `shop-onboard-04.webm`

At the end you will have: Store location saved; the store's address found
Before you start: You need your store's region, province, city and barangay.

Steps

1

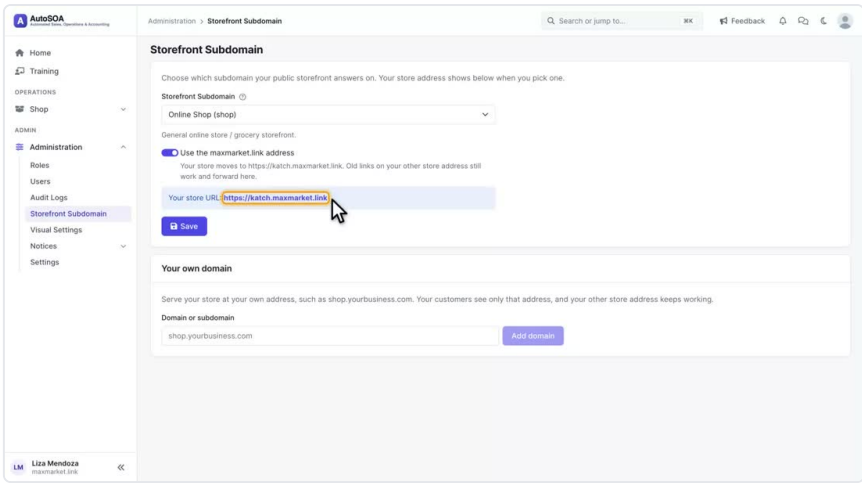
Open Shop, then Storefront, then Store profile.



This is Store Profile. Browse stores uses it to show your store to customers near you.

2

Choose your region in Region.
Choose your province in Province.
Choose your city in City.
Choose your barangay in Barangay.
Click Save.



Now find your store's address. Open Administration, then Storefront Subdomain. This is Storefront Subdomain. It shows the address of your store on the web. Here is your store's address: katch dot maxmarket dot link. You give this address to your customers.

You saved your store's location. You found the address your customers use. Next, you make the aisles of your store.

Check yourself

▼ Why does your store need a location?

Browse stores uses it to show your store to customers near you.

▼ Where do you find your store's address on the web?

Open **Administration**, then **Storefront Subdomain**. Look at **Your store URL**.

Lesson 5 Your aisles

For Owner · 2 min · video `shop-onboard-05.webm`

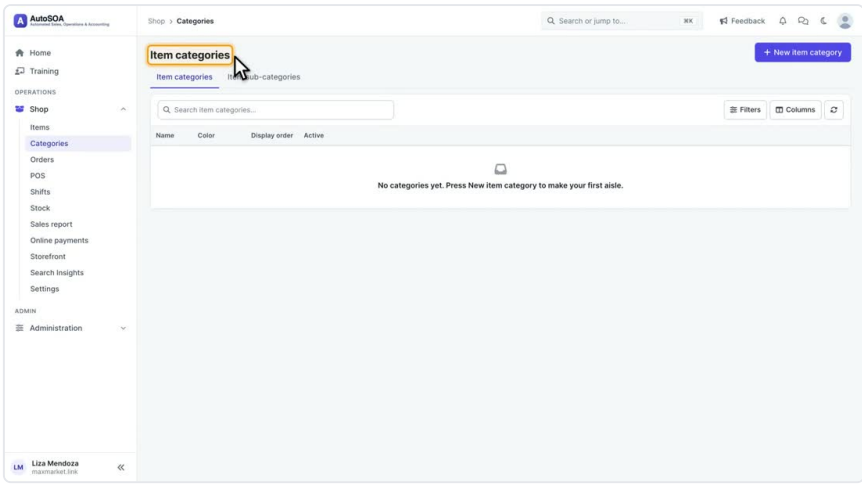
At the end you will have: Two categories with sub-categories
Before you start: You need the list of the kinds of things you sell.

Customers find items by aisle. A category is a big aisle. A sub-category is a smaller aisle inside it.

Steps

1

Open Shop, then Categories.



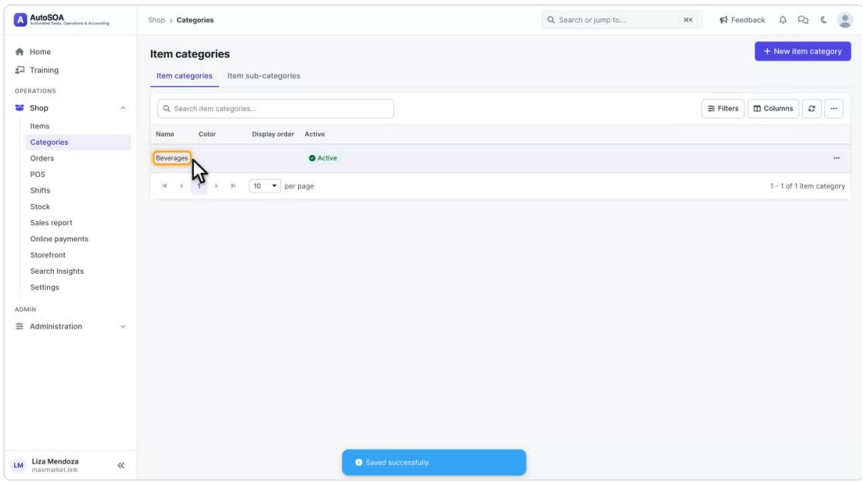
This is Item Categories. It is empty, because your store is new.

2

Click New item category.

Type Beverages in Name.

Click Save.



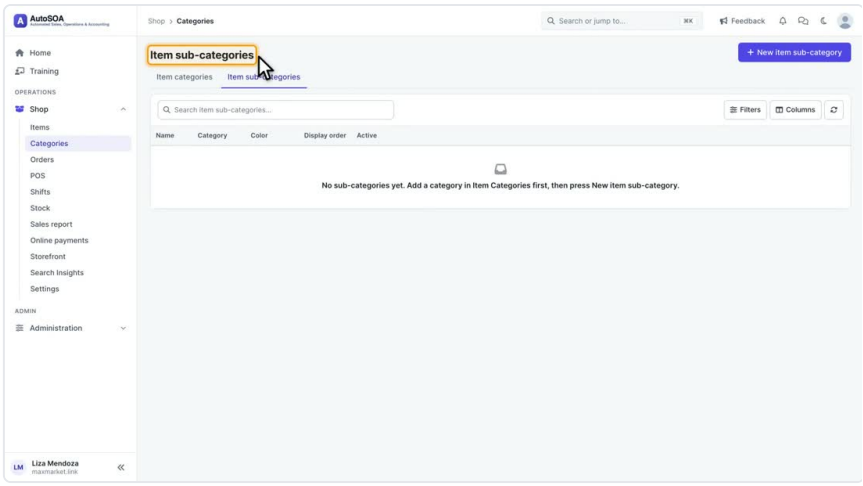
Beverages is in the list.

3

Click New item category.

Type Food Pantry in Name.

Click Save.



Now the smaller aisles. Open Shop, then Categories, then Item sub-categories. This is Item sub-categories. Each one sits inside a category.

4

Click New item sub-category.

Type Softdrinks in Name.

Choose Beverages in Category.

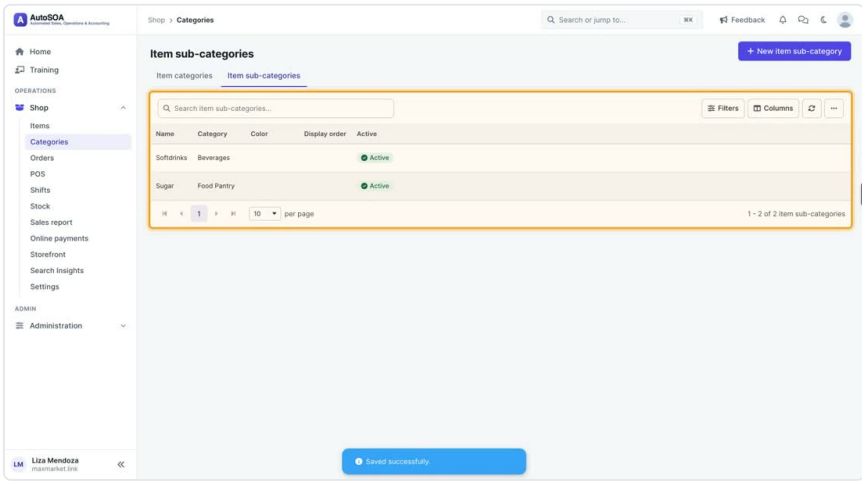
Click Save.

Click New item sub-category.

Type Sugar in Name.

Choose Food Pantry in Category.

Click Save.



Here are your two smaller aisles, each inside its category.

You made two categories, Beverages and Food Pantry. You put a sub-category inside each one. Next, you put your first items on the shelves.

Check yourself

▼ What is the difference between a category and a sub-category?

A category is a big aisle. A sub-category is a smaller aisle inside it.

▼ Which comes first?

The category. A sub-category needs a category to sit in.

Lesson 6 Your first items

For Owner · 3 min · video `shop-onboard-06.webm`

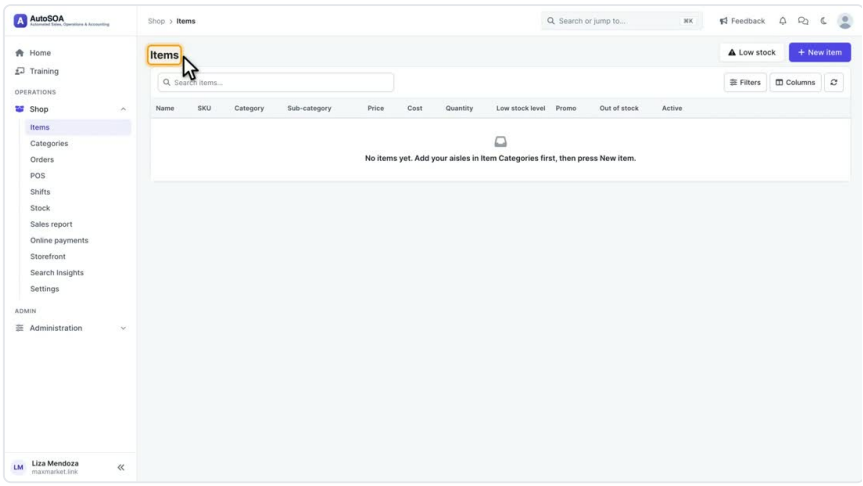
At the end you will have: Three items with price, cost, quantity, low stock level and photo

Before you start: You need the aisles from lesson 5, and for each item its price, cost, stock count and photo.

Steps

1

Open Shop, then Items.



This is Items. It is the list of everything you sell.

2

Name is what your customers read. Write it the way it says on the pack.

SKU is your own code for the item. At the POS, a scan finds the item by this code.

Price is what your customer pays. Cost is what you pay. Your customers never see the cost.

Quantity is how many you have today. You type it here once. After you save, sales and deliveries change it.

Low stock level is the quantity at which you buy more. At or below it, the stock page says the item is running low.

Click New item.

Type Coke Original 1.5 Liter in Name.

Type BEV-001 in SKU.

Choose Beverages in Category.

Choose Softdrinks in Sub-category.

Type 80 in Price.

Type 65 in Cost.

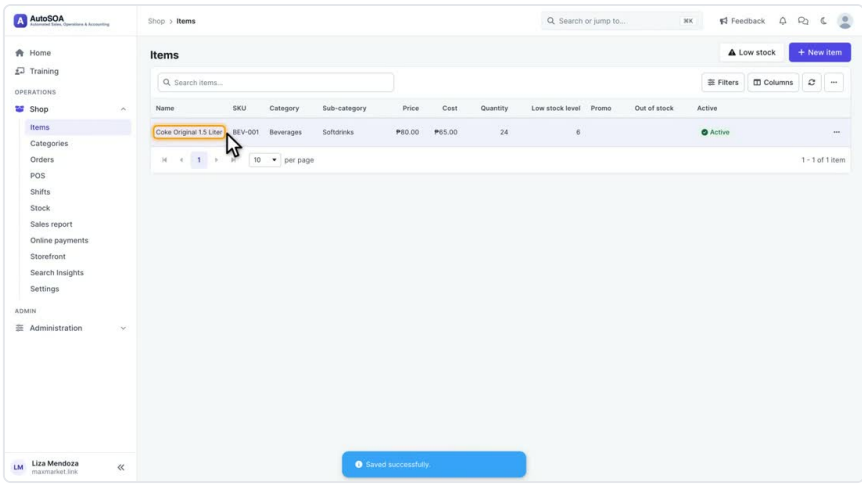
Type 24 in Quantity.

Type 6 in Low stock level.

Click Choose a picture, and pick the item's photo.

Click Upload image.

Click Save.



Coke Original is in your list, with its price.

3

The next two items use the same steps.

Click New item.

Type Sprite 1.5 Liter in Name.

Type BEV-002 in SKU.

Choose Beverages in Category.

Choose Softdrinks in Sub-category.

Type 75 in Price.

Type 62 in Cost.

Type 18 in Quantity.

Type 6 in Low stock level.

Click Choose a picture, and pick the item's photo.

Click Upload image.

Click Save.

Click New item.

Type Refined White Sugar 1/4kg in Name.

Type PAN-001 in SKU.

Choose Food Pantry in Category.

Choose Sugar in Sub-category.

Type 26 in Price.

Type 20 in Cost.

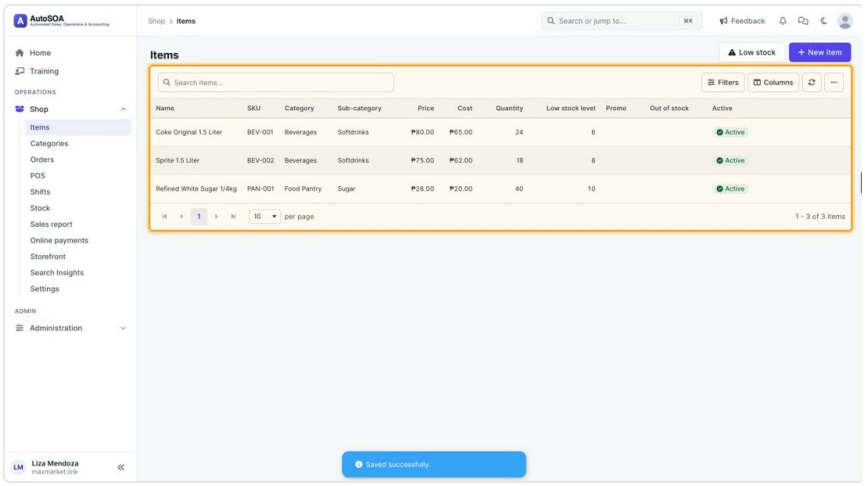
Type 40 in Quantity.

Type 10 in Low stock level.

Click Choose a picture, and pick the item's photo.

Click Upload image.

Click Save.



Here are your three items, each with its price, cost and quantity.

You added three items, each in its aisle. Each one has a price, a cost, a quantity and a photo. Next, you add an item that comes in two sizes.

Check yourself

▼ Who can see an item's cost?

You and your staff. Your customers never see it.

▼ After you save an item, how does its quantity change?

Only through sales, deliveries and stock counts. The item form cannot change it.

Common mistakes

- **The screen says:** The Save button stays grey.
  Do: A required box is empty. Fill in **Name**, **Price**, **Cost** and **Quantity**.

Lesson 7 Items that come in sizes

For Owner · 3 min · video `shop-onboard-07.webm`

At the end you will have: A main item with two options, each with its own price and stock

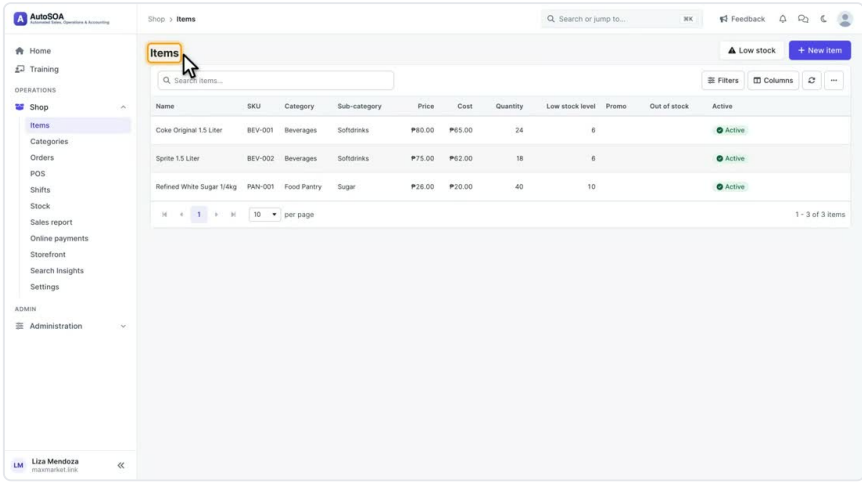
Before you start: You need the Food Pantry aisle you made in lesson 5.

Steps

1

The store sells malagkit rice by the kilo and by the quarter kilo.

Open Shop, then Items.



This is the Items page. Each size is an item of its own, with its own price and stock.

2

First, add the main item: the one kilo sack. The option label is what a customer picks in the store. Give the main item a label too. It is the first choice.

Click New item.

Type Malagkit Rice 1kg in Name.

Type PAN-101 in SKU.

Choose Food Pantry in Category.

Type 1 kg in Option label.

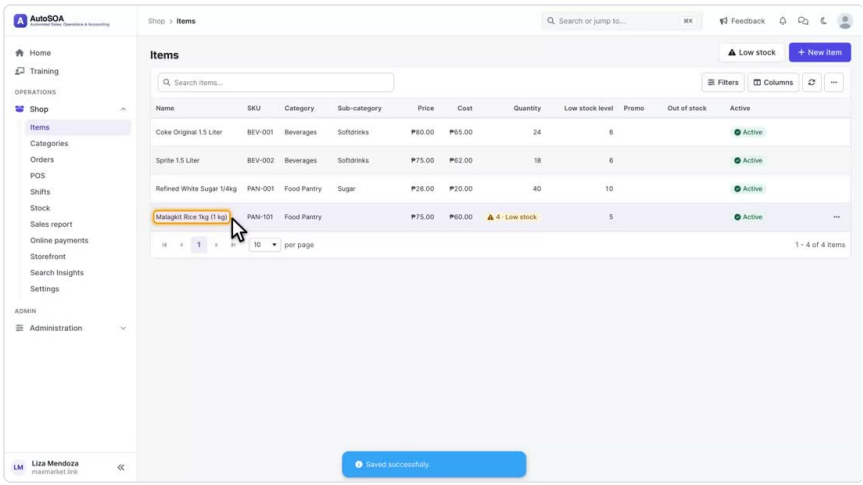
Type 75 in Price.

Type 60 in Cost.

Type 4 in Quantity. The store has four sacks left.

Type 5 in Low stock level. Four is below five, so the stock page says this item is running low.

Click Save.



The list shows the sack, with its label 1 kg.

3

Now add the quarter kilo bag.

Option of joins this bag to the sack. In the store, the two show as one card, with a choice of size.

Click New item.

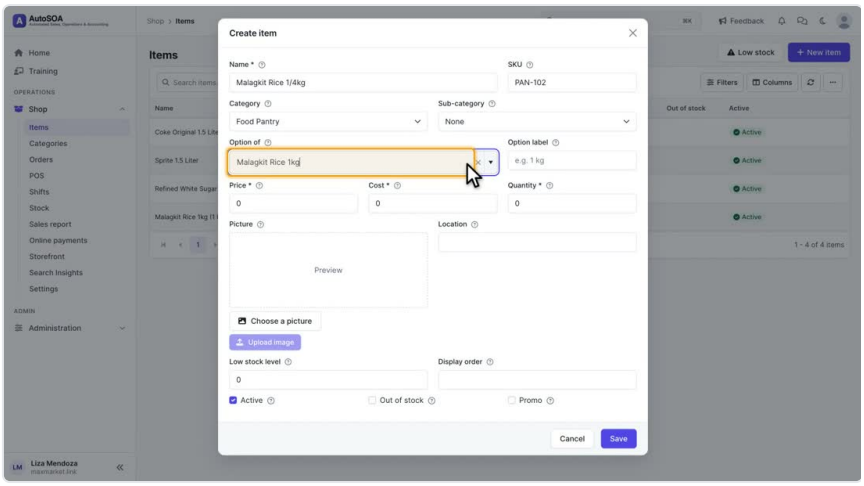
Type Malagkit Rice 1/4kg in Name.

Type PAN-102 in SKU.

Choose Food Pantry in Category.

Find Malagkit in Option of.

Click Malagkit Rice 1kg.



The bag is now an option of the sack.

4

An option keeps its own price, cost and stock. Selling a bag never takes stock from the sack.

Type 1/4 kg in Option label.

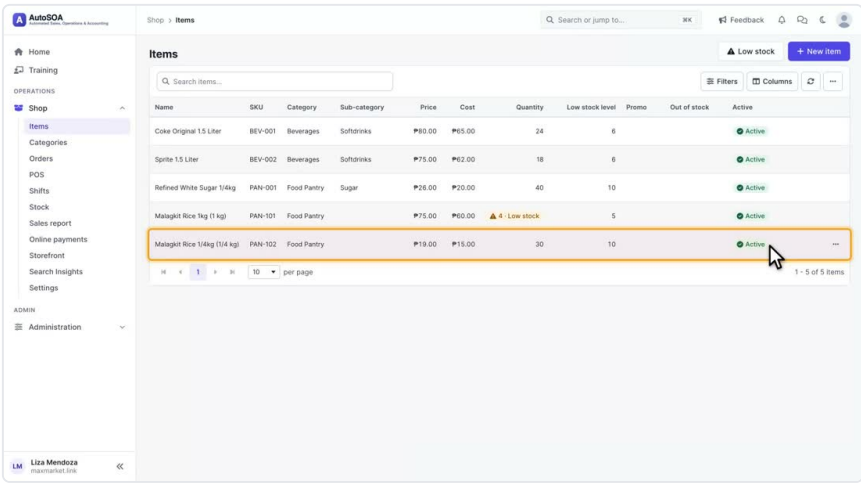
Type 19 in Price.

Type 15 in Cost.

Type 30 in Quantity.

Type 10 in Low stock level.

Click Save.



Here is the quarter kilo bag in your items list, labelled 1/4 kg, at ₱19.00.

You added an item in two sizes. The sack is the main item. The bag is its option, with its own price and stock. Next, you see your store the way customers see it, with both sizes.

Check yourself

▼ Does selling the small bag take stock from the big sack?

No. Each size is an item of its own, with its own price, cost and stock.

▼ Which item do you make first?

The main item. Then each other size points to it in **Option of**.

Common mistakes

- **The screen says:** The store shows the two sizes as two cards.
  Do: Open the smaller size and choose the main item in **Option of**. Give both an **Option label**.

Lesson 8 See your store

For Owner · 2 min · video `shop-onboard-08.webm`

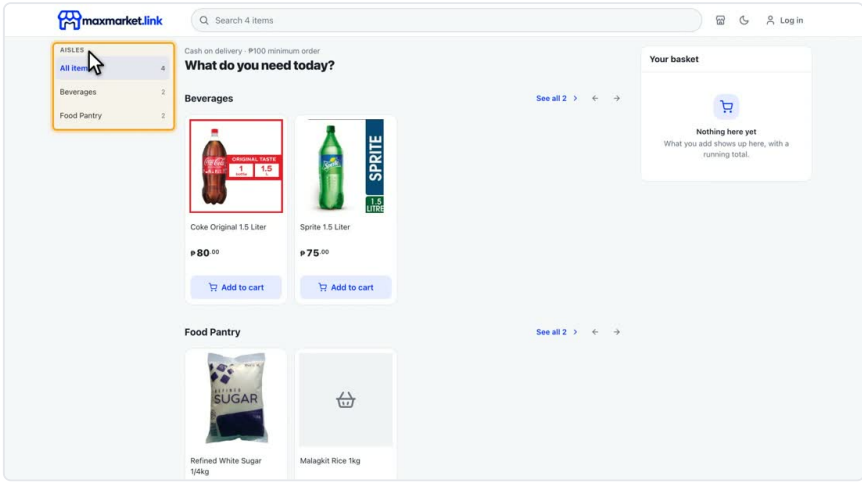
At the end you will have: The new items found in the store; the sizes chosen from one card

Before you start: You need the items from lessons 6 and 7.

Steps

1

Open a new browser tab, and type your store's address from lesson 4. This is your store.

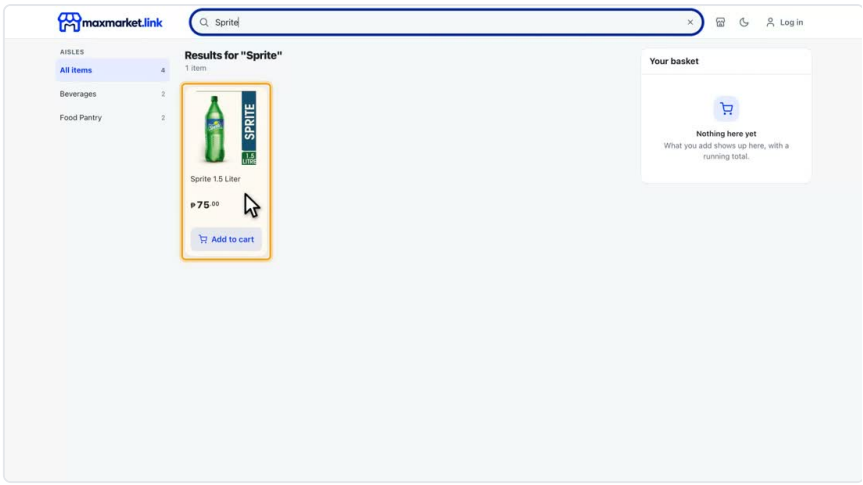


Here is your logo. Your buttons and links use your color. Here are your aisles. Each one shows how many items it holds.

2

Your customers can search for an item by name.

Find “"Sprite"” in the search box.

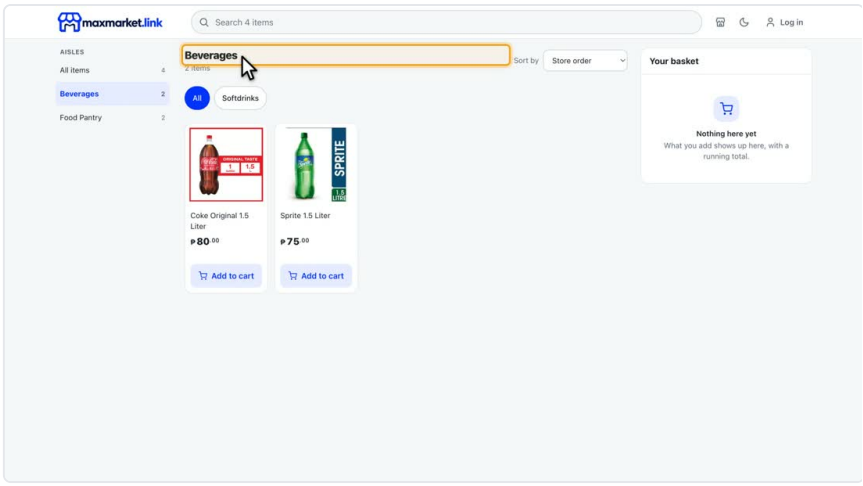


Sprite 1.5 Liter shows, with its price.

3

Click the small cross in the search box, to clear it.

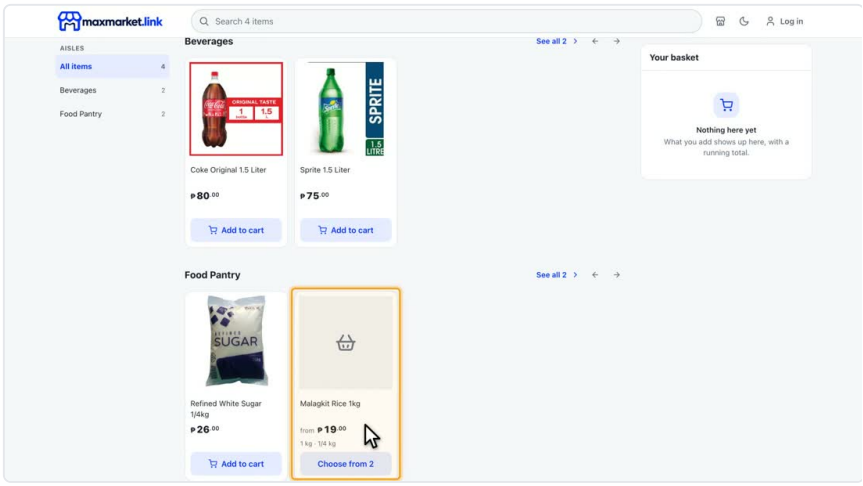
Click Beverages.



The store shows only the Beverages aisle.

4

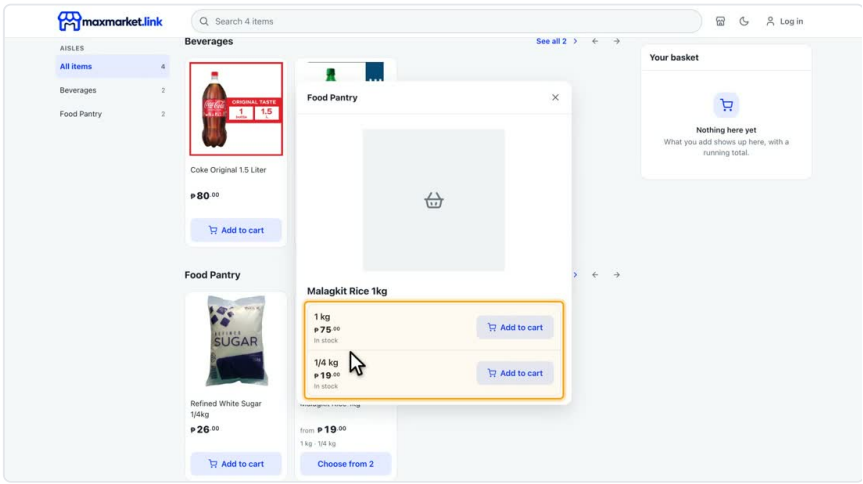
Click All items.



The rice shows as one card, from its lowest price, with both sizes under its name.

5

Click Choose from 2.

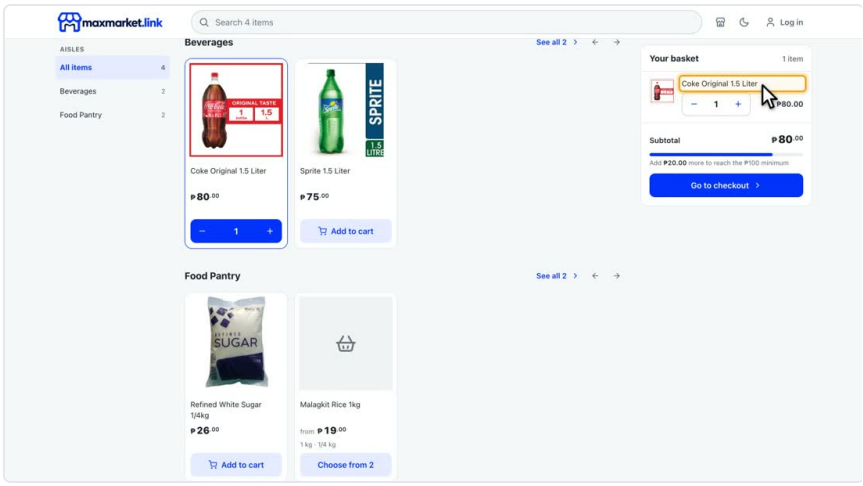


Each size has its own price and its own Add to cart: 1 kg at ₱75.00, 1/4 kg at ₱19.00.

6

Click the X at the top, to close it.

Click Add to cart under Coke Original 1.5 Liter.

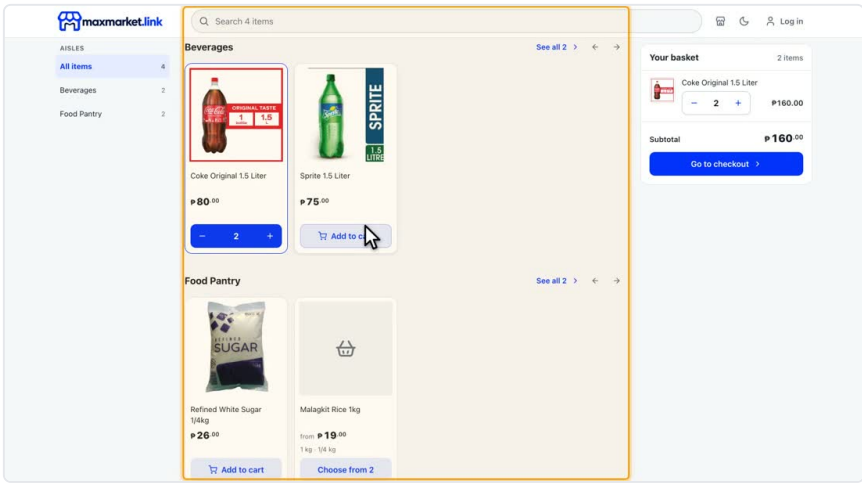


The item is in Your basket.

7

The minimum order is ₱100. The basket says how much more your customer must add.

Click the plus sign under the item.



Two bottles make ₱160.00. The minimum is reached, so the message is gone. Here is your store: your logo, your color, your aisles and your items.

You opened your store. You searched, you opened an aisle and you added an item to the basket. Next, you set the steps of an order.

Check yourself

▼ What does the basket tell a customer under the minimum order?

How much more they must add to reach ₱100.

▼ Where do your customers search?

In the search box at the top of your store.

Lesson 9 Statuses, payment methods and reasons

For Owner · 2 min · video `shop-onboard-09.webm`

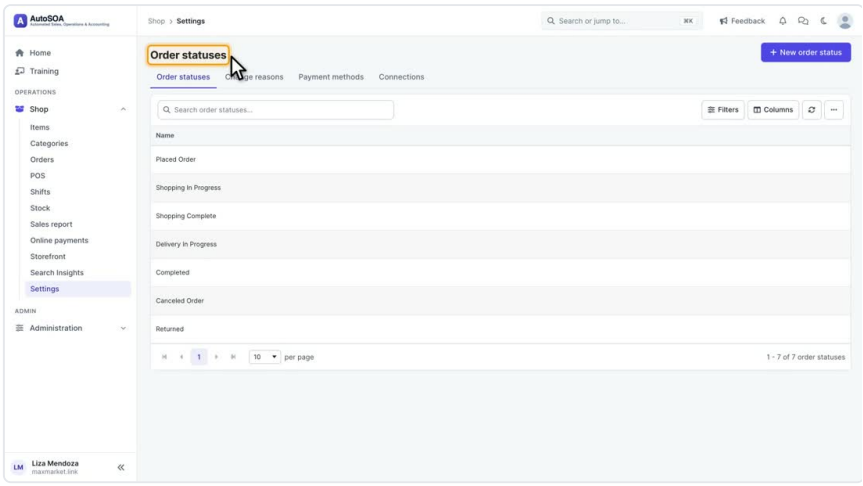
At the end you will have: Three change reasons added; the seven statuses and three payment methods read

Before you start: You need nothing new. Your store starts with its steps and its ways to pay.

Steps

1

Open Shop, then Settings.

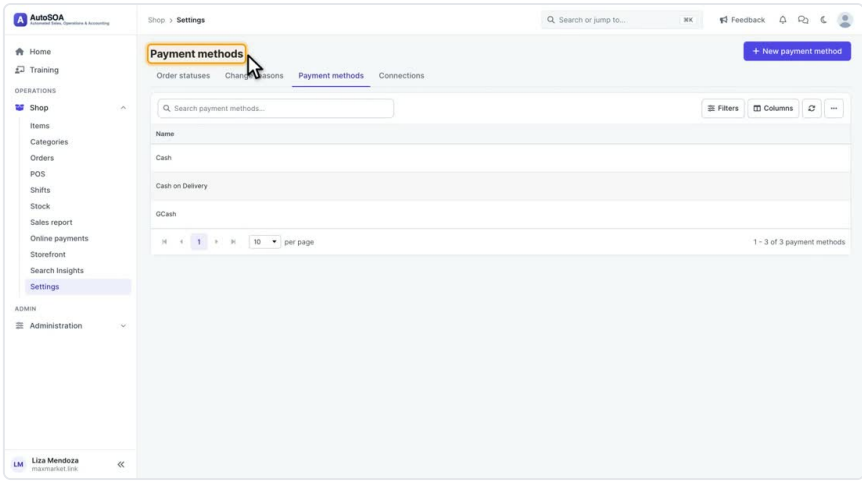


This is Order statuses. Each status is a step an order goes through.

2

Your store starts with seven statuses. Your customers see them when they track an order.

Shopping Complete takes the items out of your stock. Canceled Order and Returned put them back. So keep these names as they are.

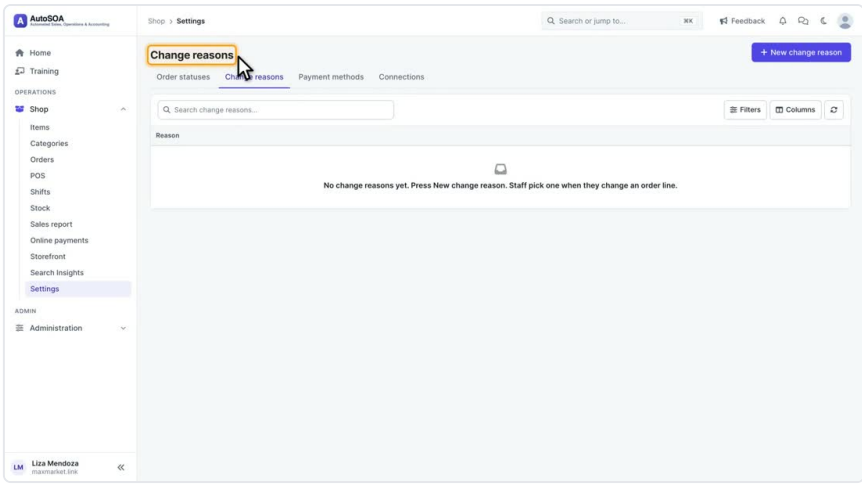


Now see how customers pay. Open Shop, then Settings, then Payment methods.

This is Payment methods. Your staff choose one of these at the POS.

3

Your store starts with Cash, Cash on Delivery and GCash. To add one, click New payment method.



Now the reasons. Open Shop, then Settings, then Change reasons. This is Change reasons. When a line on an order or a stock count changes, your staff must give a reason. These are the reasons they choose from.

4

Click New change reason.

Type Out of stock on the shelf in Reason.

Click Save.

Click New change reason.

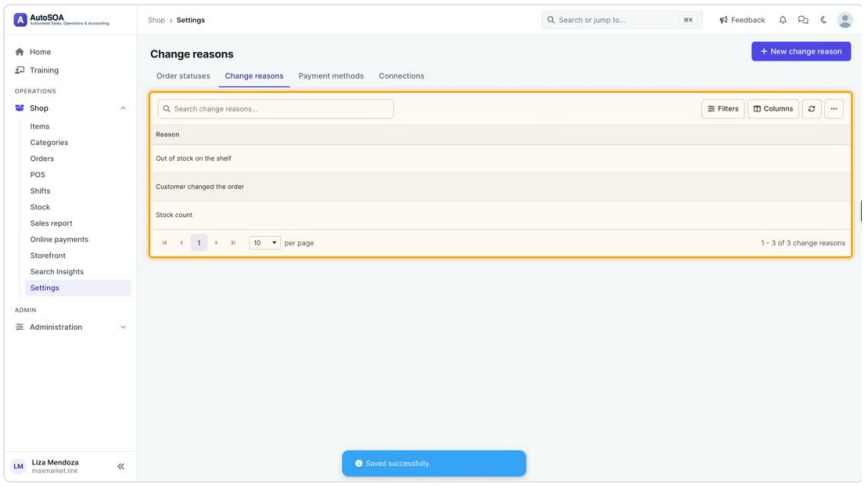
Type Customer changed the order in Reason.

Click Save.

Click New change reason.

Type Stock count in Reason.

Click Save.



Here are your three reasons.

You saw the seven statuses and the three ways to pay. You added three reasons for a change. Next, you let customers pay online.

Check yourself

▼ Why should you keep the status names?

Stock follows them. **Shopping Complete** takes the items, and **Canceled Order** and **Returned** put them back.

▼ When do your staff need a change reason?

When a line on an order changes, and when they save a stock count.

Lesson 10 Take GCash, Maya and card payments

For Owner · 2 min · video `shop-onboard-10.webm`

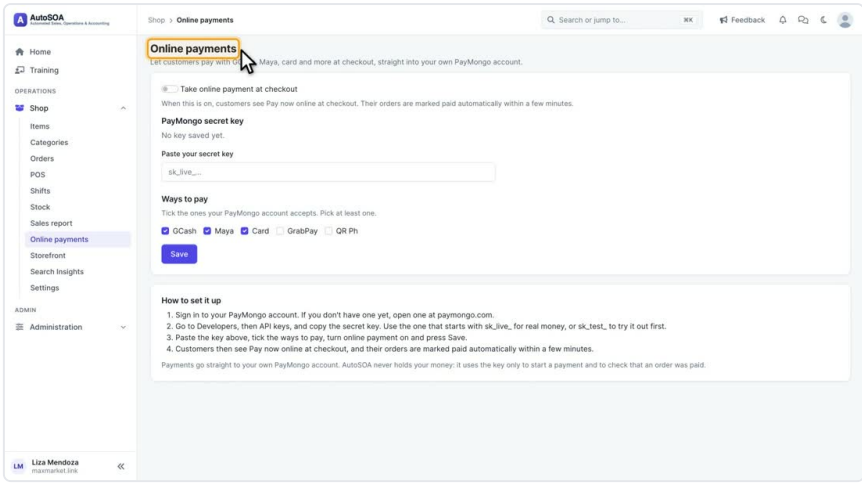
At the end you will have: Online payment on, with the store's own PayMongo test key; Pay now online seen at checkout, marked Test mode

Before you start: You need a PayMongo account, and its secret key. The money goes straight to your PayMongo account.

Steps

1

Open Shop, then Online payments.



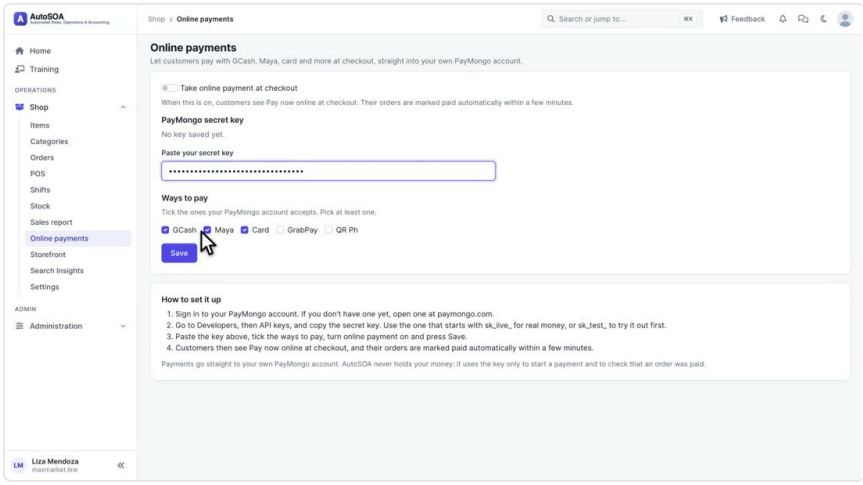
This is the Online payments page. It connects your store to your own PayMongo account.

2

The secret key lets your store open a PayMongo checkout. Copy it from PayMongo, under Developers, then API keys. This lesson uses a test key.

Ways to pay are the choices your customers get. Tick a way to pay only after PayMongo has turned it on for you.

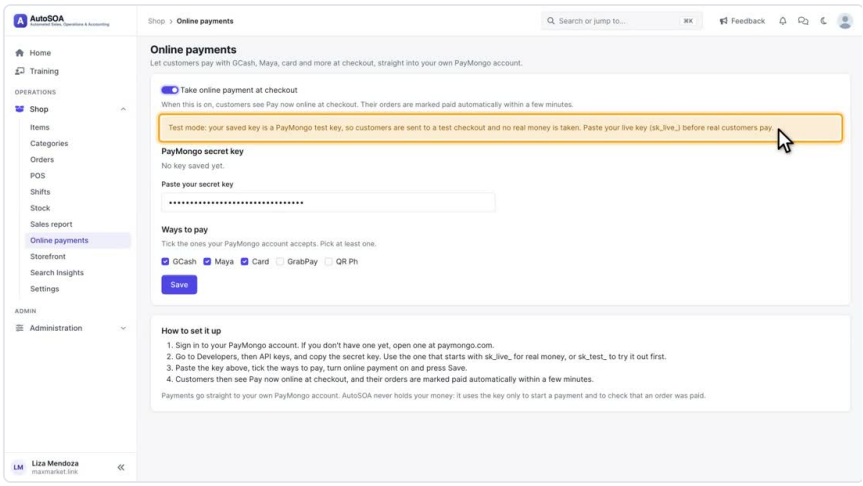
Type the secret key from PayMongo in Paste your secret key. It shows as dots.



GCash, Maya and Card are ticked.

3

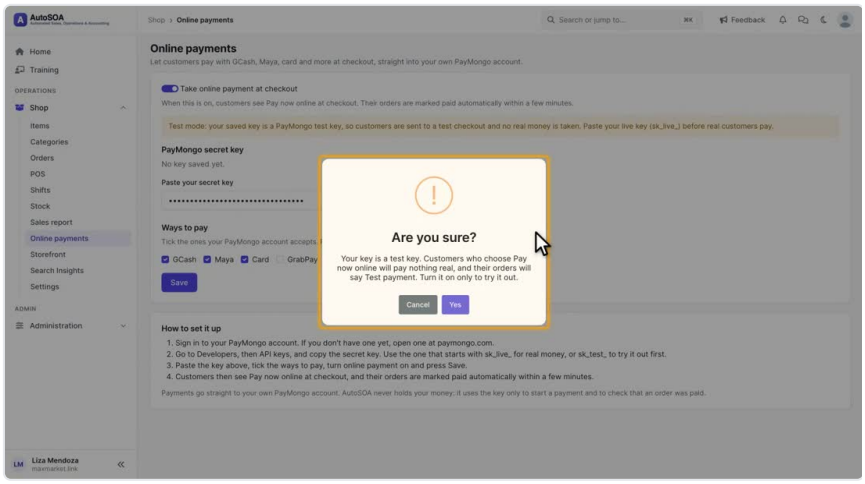
Turn on Take online payment at checkout.



The page warns you: this is a test key. Customers go to a test checkout, and no real money is taken.

4

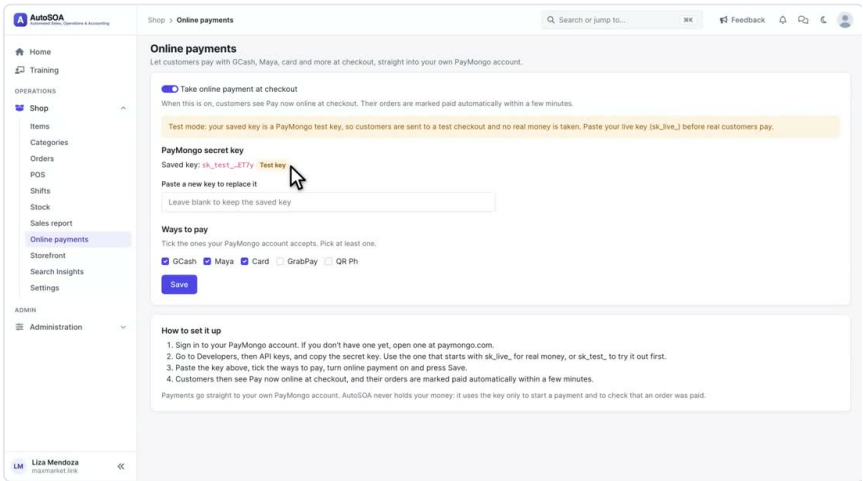
Click Save.



The app asks before it turns on test mode. Use a test key only to test the checkout.

5

Click Yes.



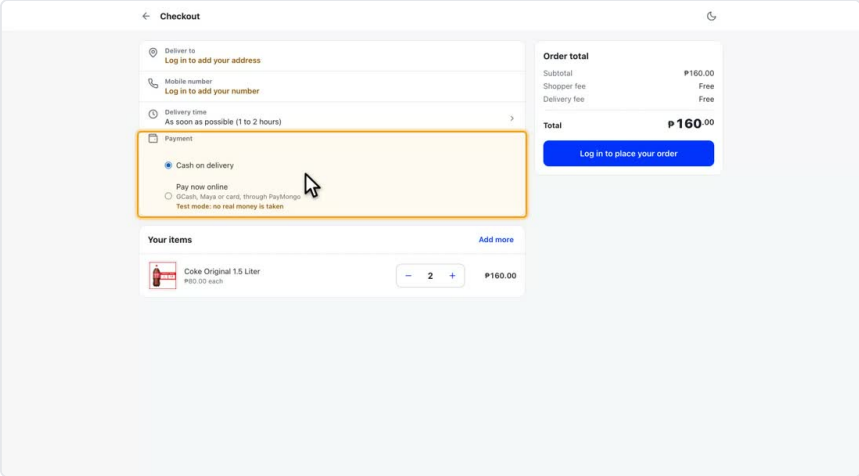
The saved key shows only its first and last letters, with a Test key label. Nobody can read the whole key here. Now see what a customer sees at checkout. Open your store.

6

Click Add to cart on the Coke.

Click the plus sign, for a second bottle. ₱160.00 is above the ₱100 minimum.

Click Go to checkout.



Here is the new choice under Payment: Pay now online, with GCash, Maya or card, through PayMongo. It says Test mode, because your key is a test key.

You connected your PayMongo account. Customers can now choose cash on delivery, or pay online. When you are ready for real payments, paste your live key. Next, a customer places their first order.

Check yourself

▼ Where does the money from Pay now online go?

Straight to your own PayMongo account.

▼ How do you know the store is still on a test key?

The page and the checkout say **Test mode**, and the saved key has a **Test key** label.

Common mistakes

- **The screen says:** Customers do not see Pay now online at checkout.
  Do: Turn on **Take online payment at checkout** and click **Save**. Tick at least one way to pay.
- **The screen says:** Orders say Test payment.
  Do: Your key is a test key. Paste your live key (it starts with sk_live_) in **Paste a new key to replace it** and click **Save**.

Lesson 11 How a customer orders

For Customer · 2 min · video `shop-onboard-11.webm`

At the end you will have: First order placed, cash on delivery

Before you start: You need your store, from lesson 8. Here, Rosa is your customer.

Steps

1

A customer makes an account once. The store then keeps her address and her orders.

Click Log in.

Click Create an account.

Type Rosa in First name.

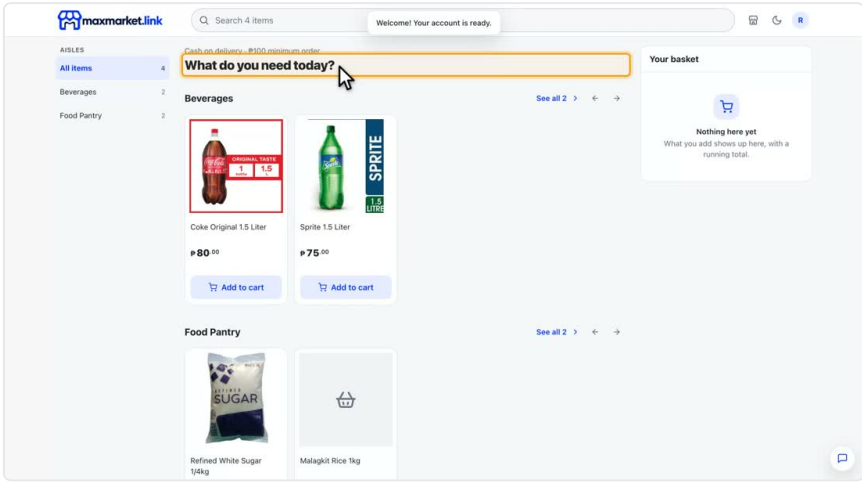
Type Santos in Last name.

Type rosa.santos in Username.

Type her email address in Email address.

Type a password in Password.

Click Create account.



The store opens, and she is signed in.

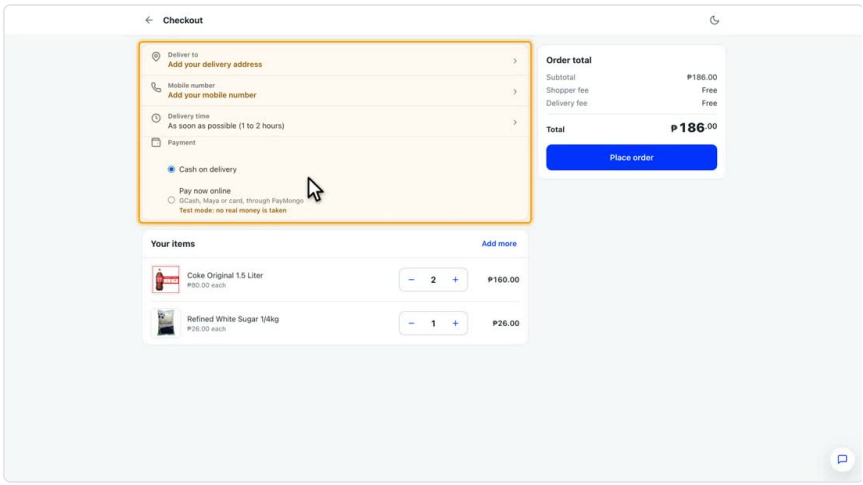
2

Click Add to cart under Coke Original 1.5 Liter.

Click the plus sign, for a second bottle.

Click Add to cart under Refined White Sugar 1/4kg.

Click Go to checkout.



This is Checkout. The order needs an address and a mobile number.

3

A customer's first order has no fees. So Shopper fee and Delivery fee both show Free. Later orders pay these fees.

Click Add your delivery address.

Click Metro Manila.

Click Metro Manila again, for the province.

Click Quezon City.

Find “"Commonwealth"” in the search box.

Click Commonwealth.

Type 1121 in Postal code.

Type the house and street in Street, building, house number.

Click Save and continue.

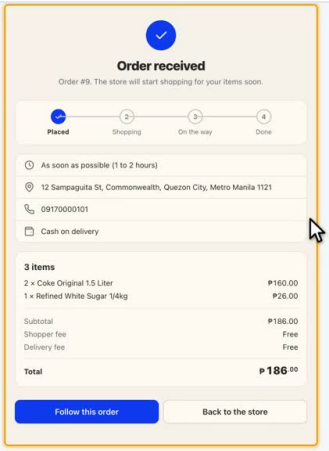
Click Add your mobile number.

Type her number in Mobile number.

Click Save and continue.

Click Place order.

Click Place order again, to confirm.



Order received. She pays ₱186.00 in cash when it arrives. Here is the order. It shows its number, its status and its total.

Rosa made an account, added her items and gave her address. She placed her first order. Next, your staff member sees this order and picks the items.

Check yourself

▼ Which order has no fees?

A customer's first order. **Shopper fee** and **Delivery fee** show Free.

▼ What does a customer need before they can place an order?

An account, a delivery address and a mobile number.

Lesson 12 See a new order and pick it

For Staff · 2 min · video `shop-onboard-12.webm`

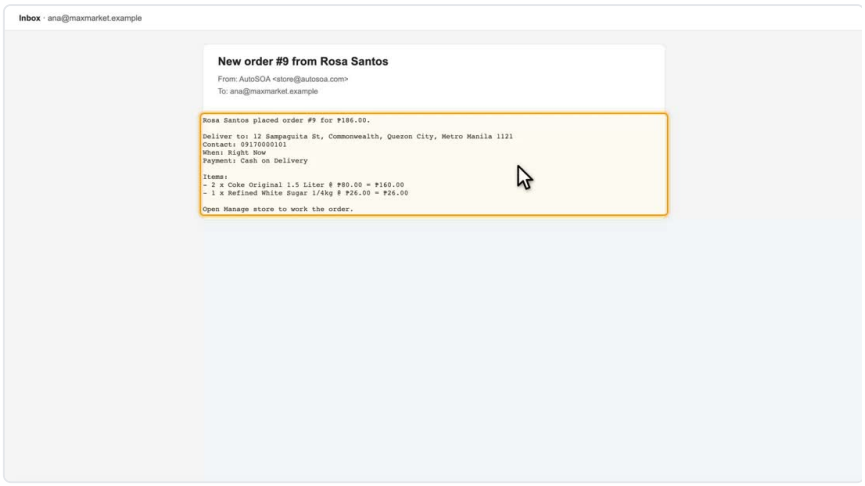
At the end you will have: The new-order email read; order marked as being picked

Before you start: You need Ana's sign-in from lesson 2, and Rosa's order from lesson 11.

Staff do this every time an order comes in. Here, Ana signs in.

Steps

1



When a customer orders, every staff member who handles orders gets an email. Here is Ana's. The subject says a new order came in, its number, and who it is from. The email lists the items, the address and the payment. Ana knows what to pick before she signs in.

2

Ana opens the store's sign-in page.

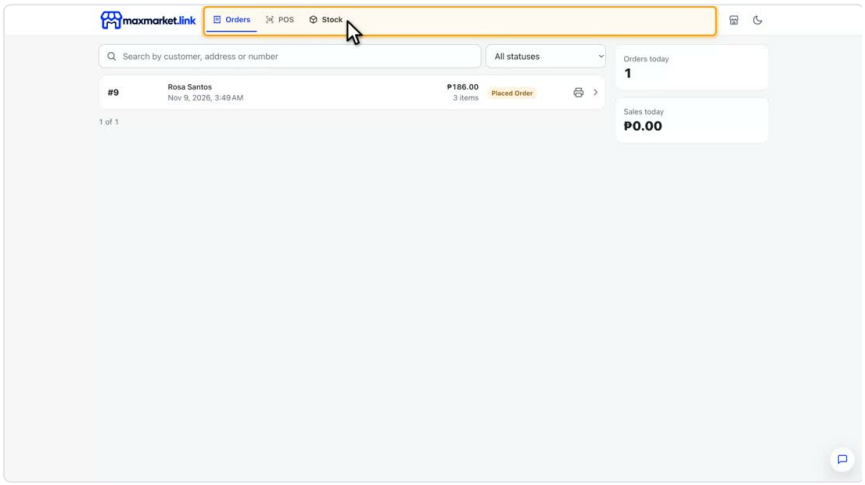
Type ana.reyes in Username or email.

Type her password in Password.

Click Log in.

Click the round A at the top, to open the menu.

Click Manage store.

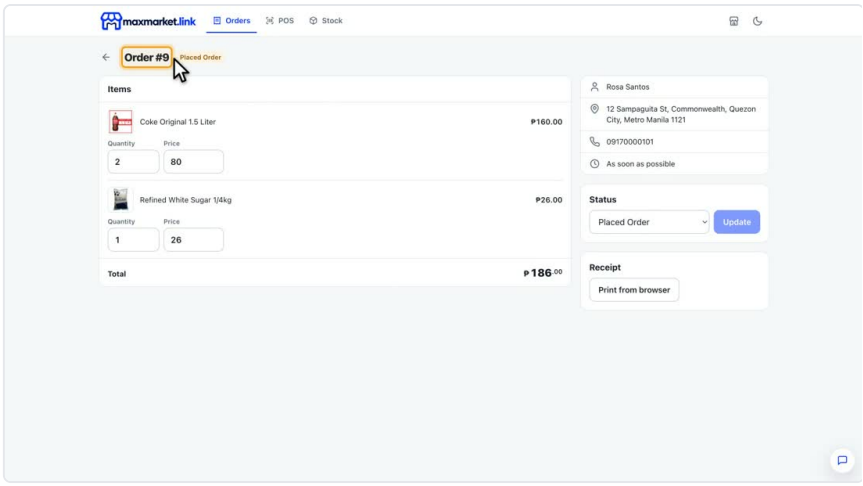


Your staff do their daily work here: Orders, POS and Stock.

3

Each new order shows in this list, with the customer's name and the total.

Click Rosa's order.



This is the order. It shows the items, the customer and the status.

4

Change the status at each step. Rosa sees each step on her phone.

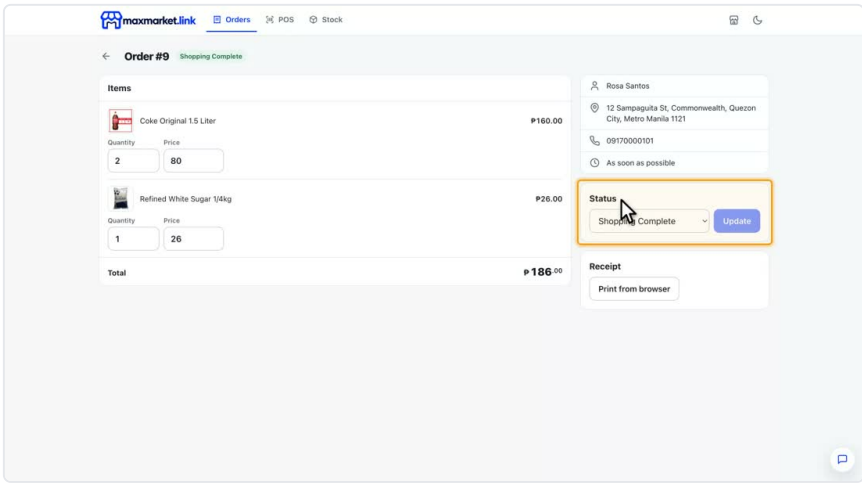
Now Ana takes the items from the shelf. That is picking.

Choose Shopping In Progress in Status.

Click Update.

Choose Shopping Complete in Status.

Click Update.

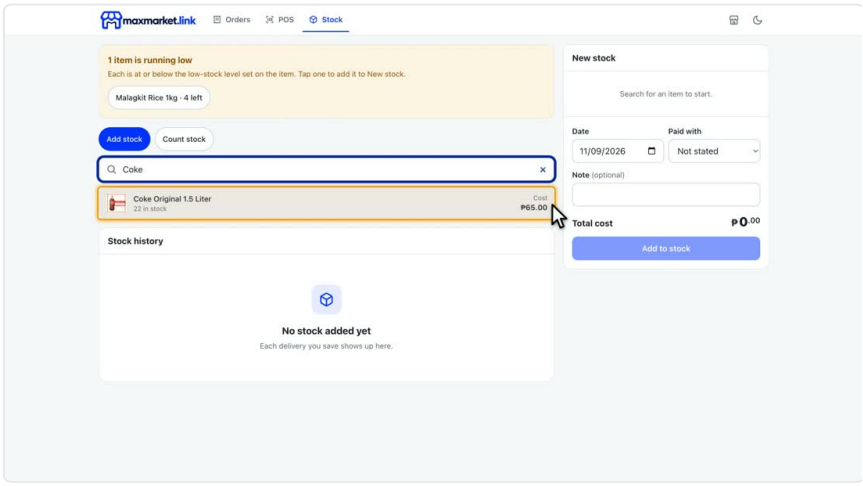


The status now shows Shopping Complete. This step takes the items out of your stock.

5

Click Stock, at the top.

Find “"Coke"” in the search box.



Coke Original now shows 22 in stock. It was 24, and Rosa ordered two.

Ana opened the order and moved it to Shopping In Progress. Then she moved it to Shopping Complete, and the stock went down. Next, Ana delivers the order and closes it.

Check yourself

▼ Which status takes the items out of your stock?

Shopping Complete.

▼ How does a staff member open Manage store?

Click their letter at the top of the store, then click **Manage store**.

Common mistakes

- **The screen says:** This store has no order statuses set up.
  Do: The staff member's role is missing **Orders**. Give them the **Staff** role.

Lesson 13 Deliver and close the order

For Staff · 2 min · video `shop-onboard-13.webm`

At the end you will have: Order closed; the customer sees it

Before you start: You need the order Ana picked in lesson 12.

Steps

1

To print a receipt for the rider, use Print from browser.

The rider gives the items to Rosa and collects the cash.

Click Rosa's order.

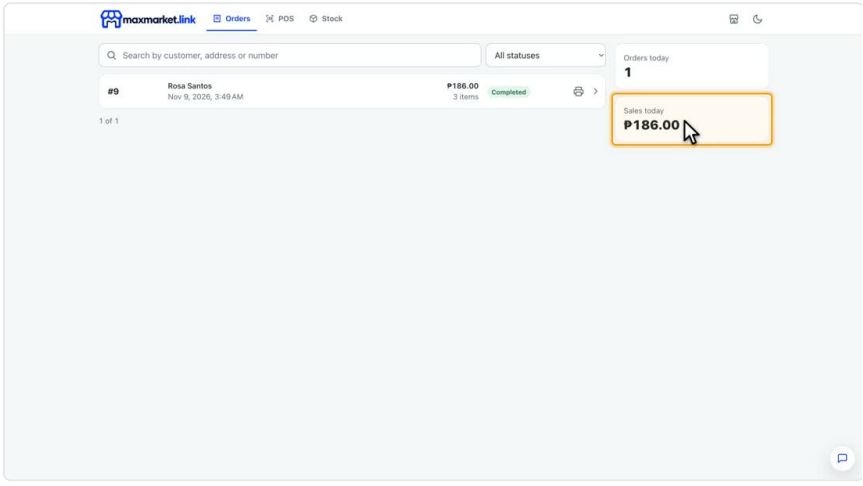
Choose Delivery In Progress in Status.

Click Update.

Choose Completed in Status.

Click Update.

Click the arrow above the order, to go back.



Sales today now shows ₱186.00. Only completed orders count.

2

Now see what Rosa sees. Ana signs out first.

Click the store picture at the top, to open the store.

Click the round A at the top.

Click Log out.

Click Log in.

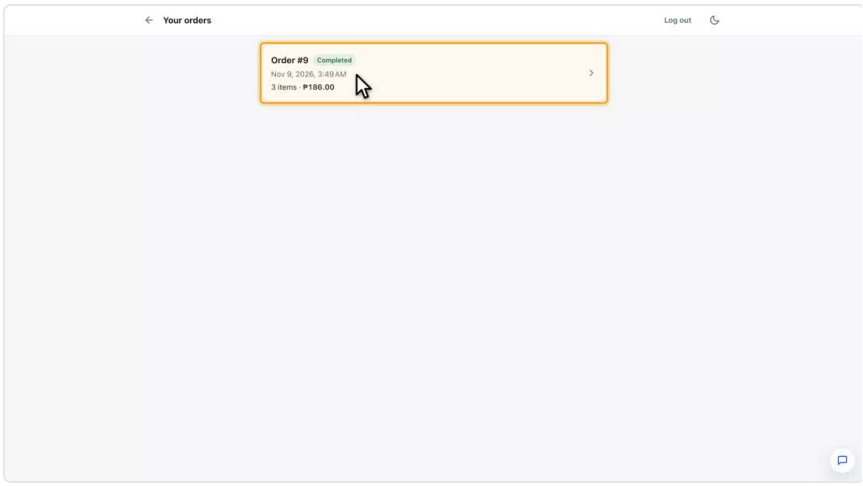
Type rosa.santos in Username or email.

Type her password in Password.

Click Log in.

Click the round R at the top.

Click Your orders.



Here is Rosa's order, Completed. She can follow every order here.

Ana moved the order to Delivery In Progress, then to Completed. The sale counted, and Rosa saw the order finished. Next, you open your cash shift before the first sale.

Check yourself

▼ Which orders count in Sales today?

Only Completed orders.

▼ Where does a customer see their order?

Click their letter at the top of the store, then click **Your orders**.

Lesson 14 Open your cash shift

For Staff · 1 min · video `shop-onboard-14.webm`

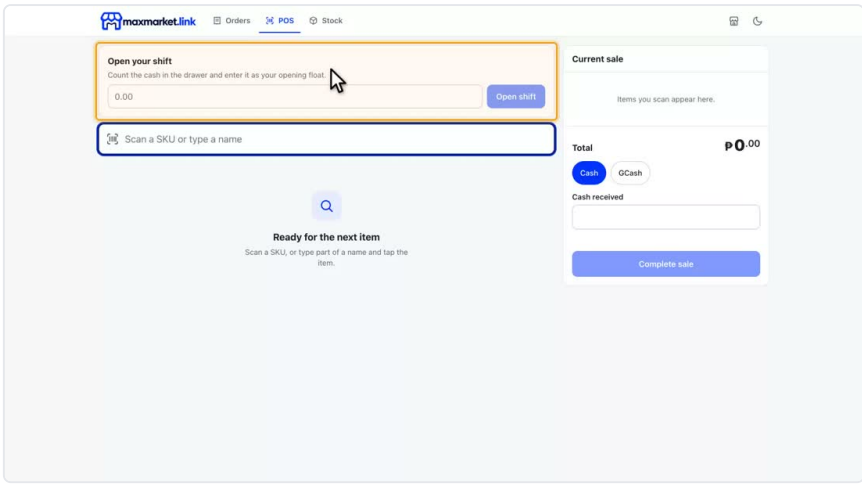
At the end you will have: A shift open with a ₱1,000 opening float
Before you start: You need the staff sign-in you made in lesson 2.

Staff do this each morning, before they sell at the POS.

Steps

1

Click POS.



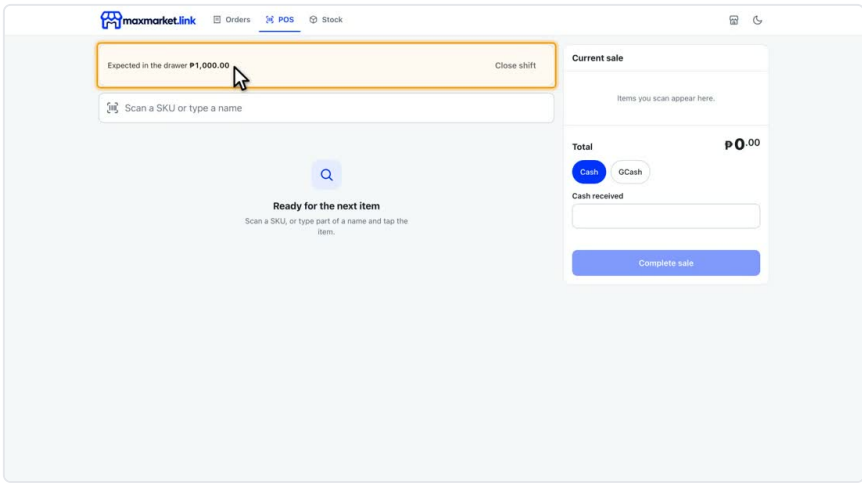
A new store uses cash shifts. The POS asks you to open your shift first. You can still sell if you forget.

2

The opening float is the cash already in the drawer. Count it first.

Type 1000 in Opening float.

Click Open shift.



Expected in the drawer shows ₱1,000.00. Each cash sale adds to it. Here is your shift, open, with ₱1,000.00 expected in the drawer.

You opened a cash shift. The app now keeps count of the cash that should be in the drawer. Next, you sell to a walk-in customer.

Check yourself

▼ What is the opening float?

The cash already in the drawer when the shift opens. Count it first.

▼ Can staff sell before they open a shift?

Yes. The POS asks first, but a sale still goes through.

Common mistakes

- **The screen says:** The POS asks to open a shift in the middle of the day.
  Do: The last shift was closed. Count the drawer and click **Open shift**.

Lesson 15 Sell at the POS

For Staff · 2 min · video `shop-onboard-15.webm`

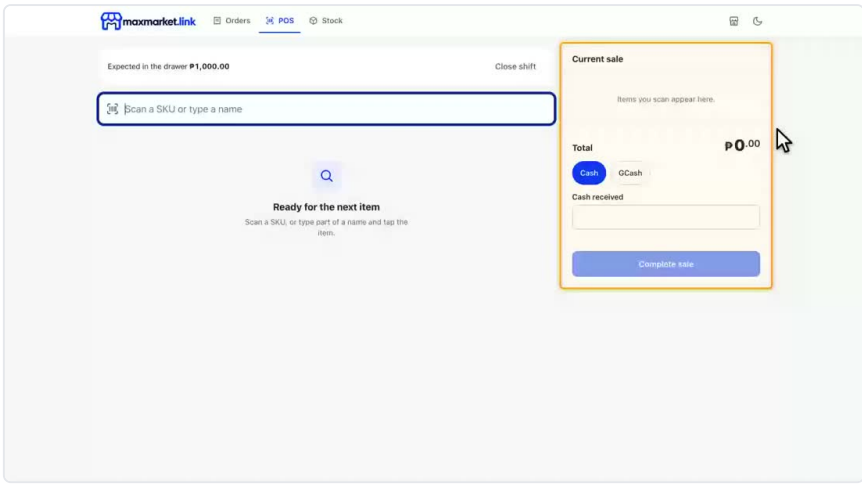
At the end you will have: First sale at the POS, inside the shift
Before you start: You need your staff sign-in, and your items.

Staff do this at the counter, on the POS page. POS means point of sale.

Steps

1

Click POS, at the top.



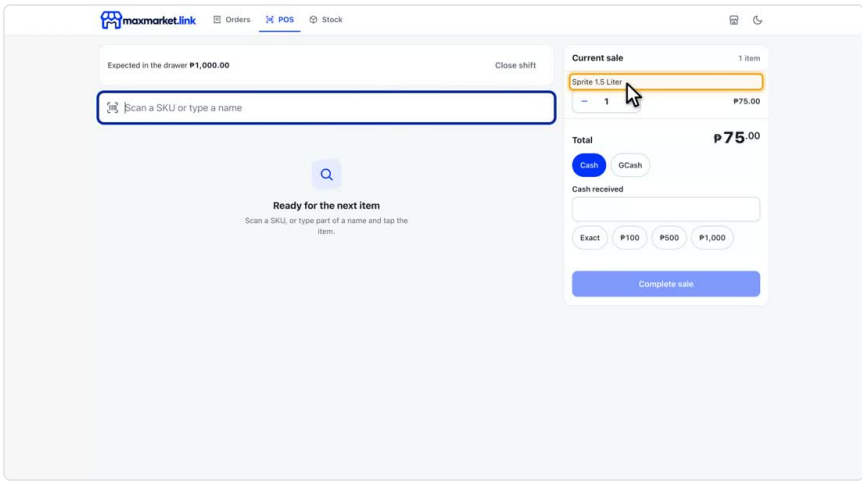
This is the POS. The left side finds items. The right side is the current sale.

2

A scanner reads the SKU for you. Without a scanner, type the SKU.

Type BEV-002 in the search box.

Press enter on your keyboard. A scanner does this for you.



Sprite is in the current sale.

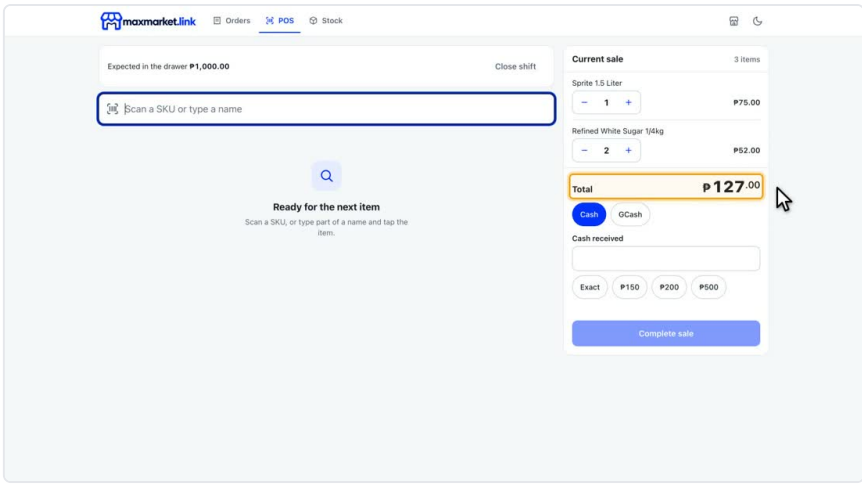
3

An item with no SKU sticker? Type part of its name.

Find “"Sugar"” in the search box.

Click Refined White Sugar 1/4kg.

Click the plus sign beside the sugar, for a second one.



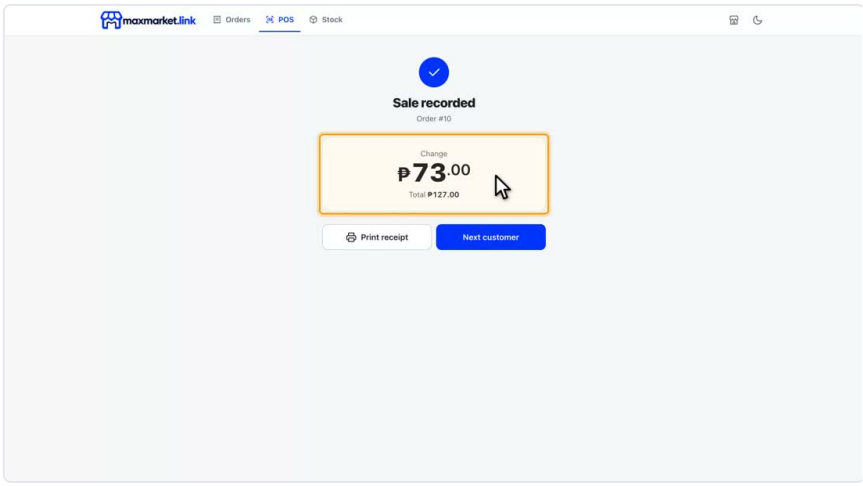
The total is ₱127.00.

4

Cash is already chosen. The customer gives you ₱200.

Type 200 in Cash received.

Click Complete sale.

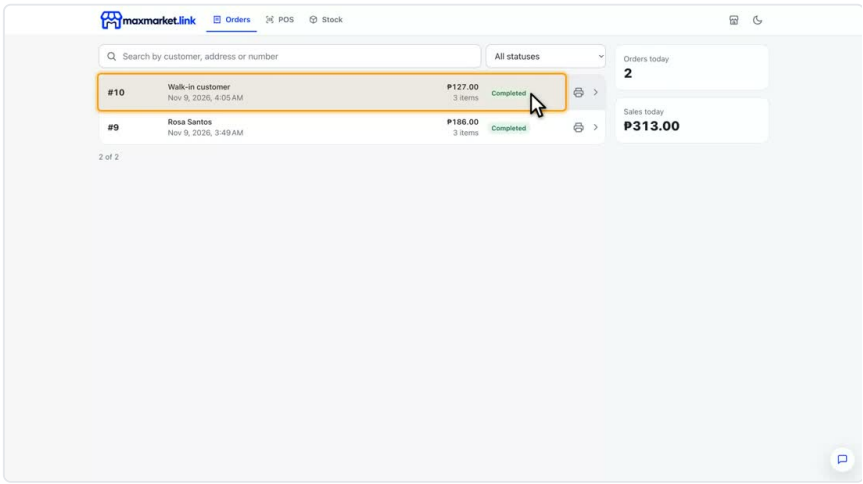


Sale recorded. Give the customer ₱73.00 in change.

5

Click Next customer.

Click Orders, at the top.



Here is your sale, from a walk-in customer, Completed. A POS sale takes the stock at once.

You scanned one item and searched for another. You took cash, and the POS showed the change. Next, you record new stock when it arrives.

Check yourself

▼ How do you add an item with no scanner?

Type the SKU in the search box and press enter, or type part of its name and click the item.

▼ When does a POS sale take the stock?
At once, when you click **Complete sale**.

Common mistakes

- **The screen says:** Nothing found for this SKU.
  Do: Check the code, or type part of the name.

Lesson 16 Record new stock

For Staff · 2 min · video `shop-onboard-16.webm`

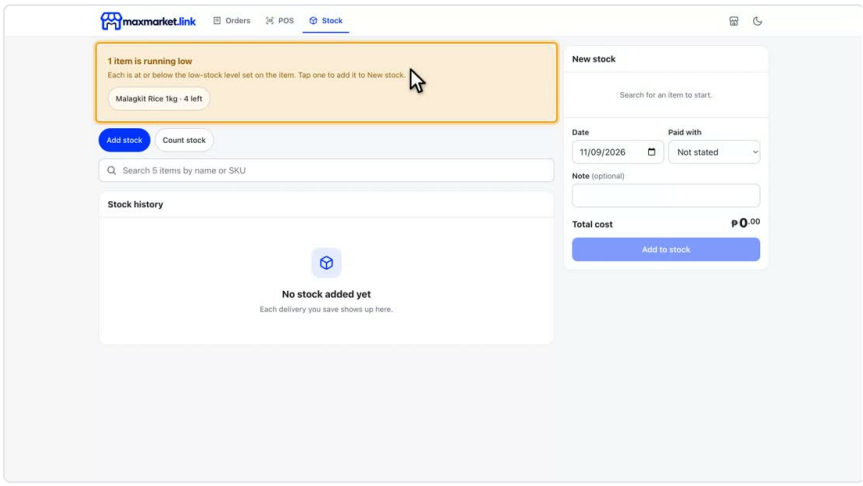
At the end you will have: The running-low item restocked; the quantity up
Before you start: You need the delivery's quantity and cost.

Do this each time your supplier delivers. The record keeps what came in, and at what cost.

Steps

1

Click Stock, at the top.



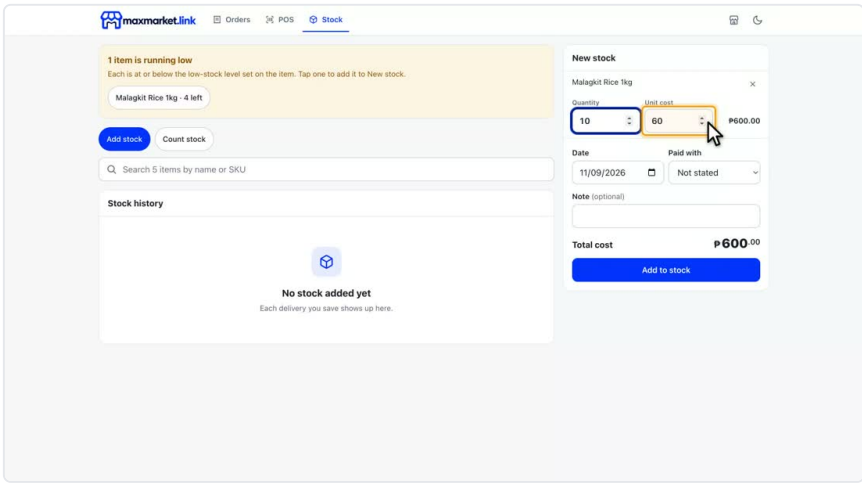
This is Stock. You add a delivery here, and you see past deliveries below. Running low lists every item at or below its low stock level. Malagkit Rice 1kg has 4 left.

2

Ten sacks arrived.

Click Malagkit Rice 1kg.

Type 10 in Quantity.

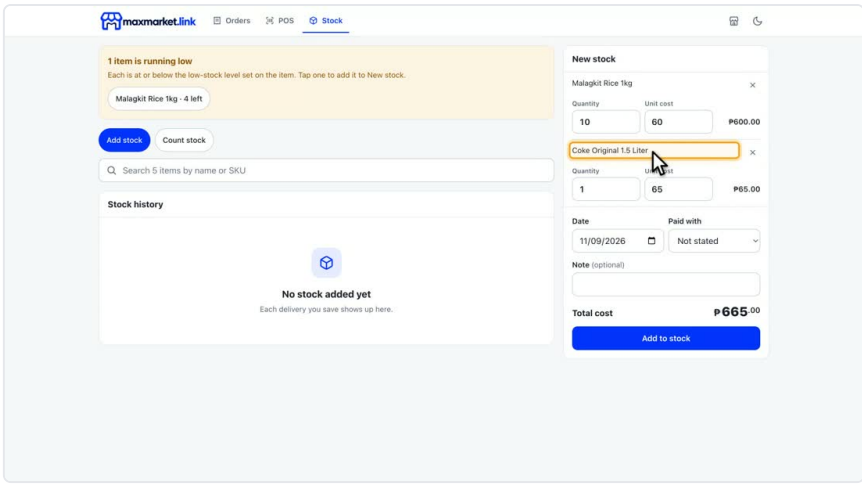


Unit cost shows the sack's cost, ₱60. Change it if the supplier charged a new price.

3

Find “"Coke"” in the search box.

Click Coke Original 1.5 Liter.



The item is in New stock.

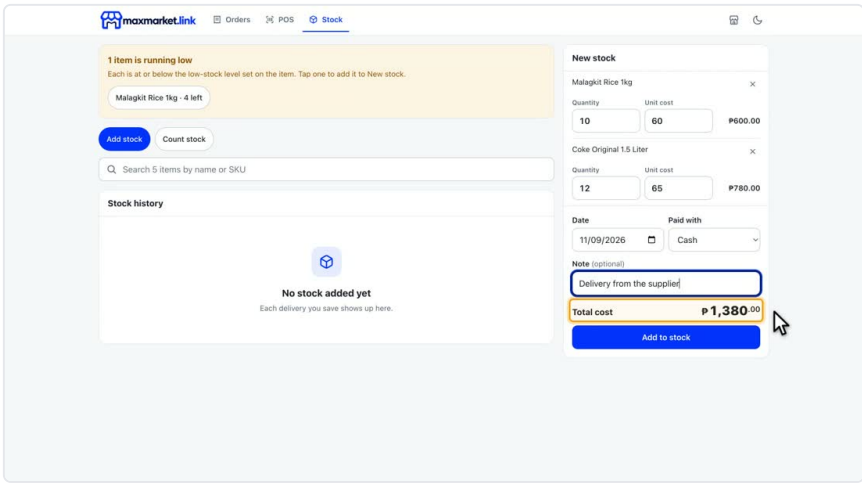
4

Unit cost is what you paid for one. It already shows the item's cost.

Type 12 in Quantity.

Choose Cash in Paid with.

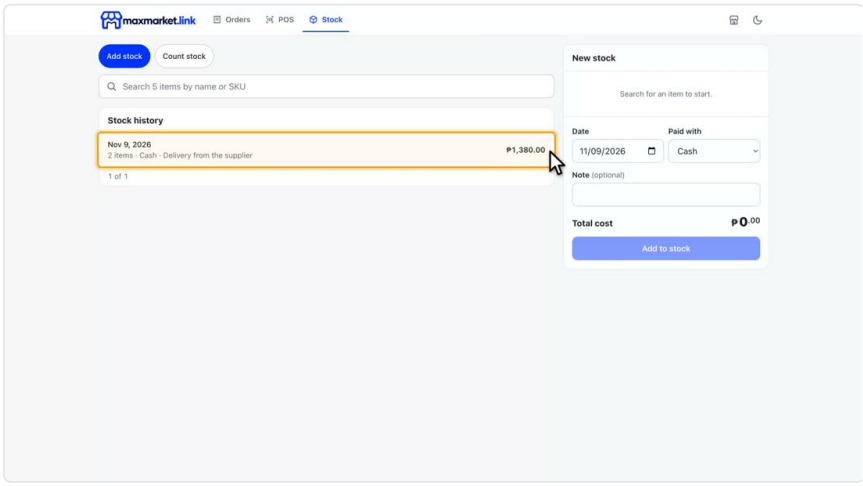
Type Delivery from the supplier in Note.



Total cost shows ₱1,380.00.

5

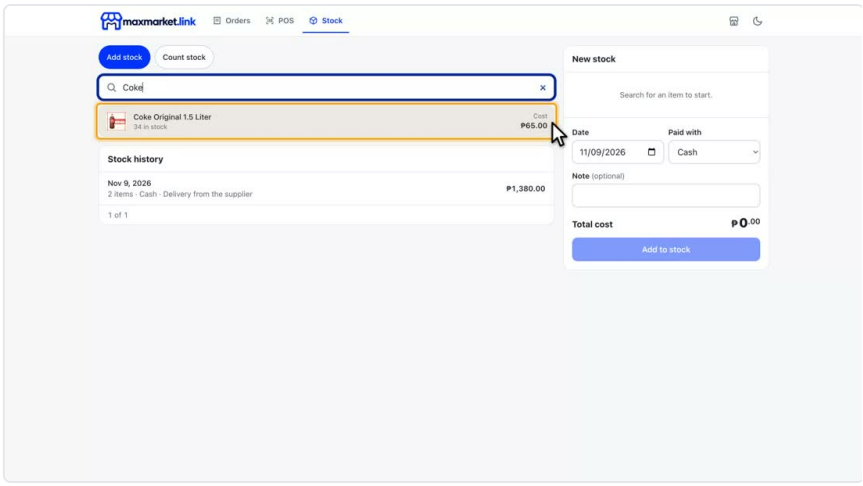
Click Add to stock.



Here is your delivery: two items, ₱1,380.00.

6

Find “"Coke"” in the search box again.



Coke Original now shows 34 in stock.

You restocked the rice that was running low, and added twelve bottles. The record is in Stock history, and the quantities went up. Next, you check your day.

Check yourself

▼ What does **Unit cost** show first?

The item's cost. Change it if the supplier's price changed.

▼ Where do past deliveries show?

In **Stock history**, under the search box.

Lesson 17 The end of the day

For Staff, then Owner · 2 min · video `shop-onboard-17.webm`

At the end you will have: The shift closed with the counted cash; the day's sales read in the Sales report

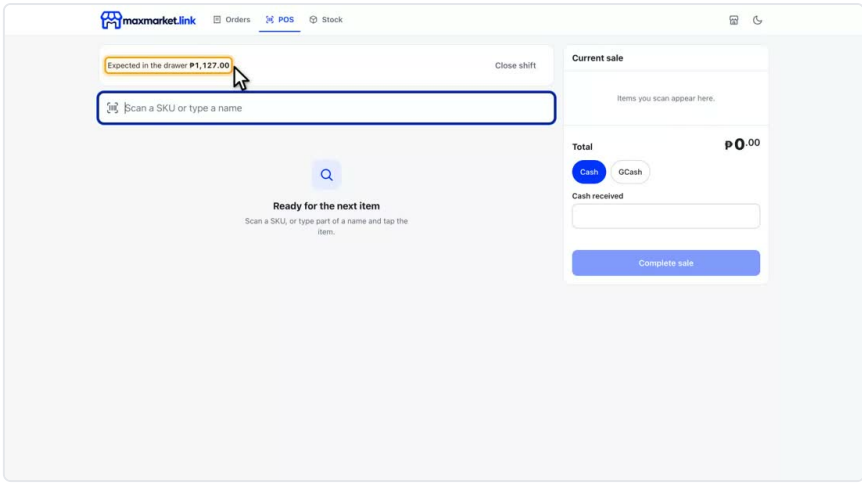
Before you start: You need the staff sign-in, the shift you opened in lesson 14, and the sales from lessons 13 and 15.

Staff close their shift when the store closes. The owner then reads the day in the app.

Steps

1

Click POS.



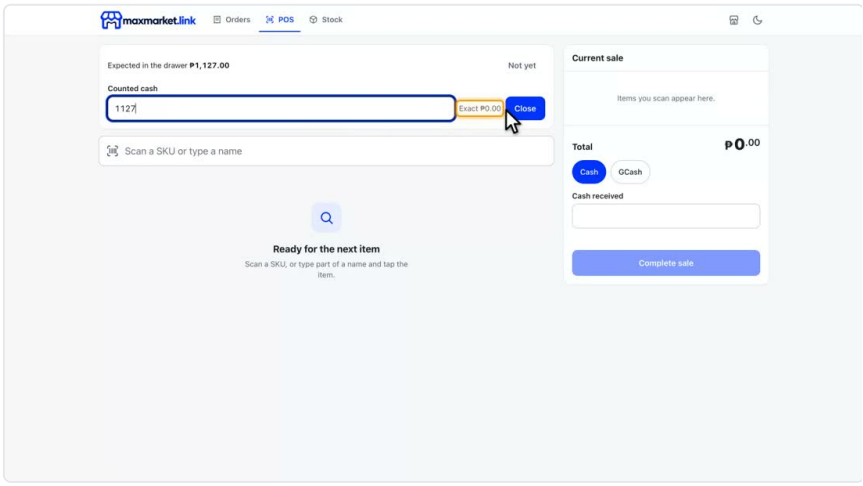
Expected in the drawer is ₱1,127.00. It is the float you counted in the morning, and the cash sale.

2

Count the cash in the drawer. Type what you counted, not what you expect.

Click Close shift.

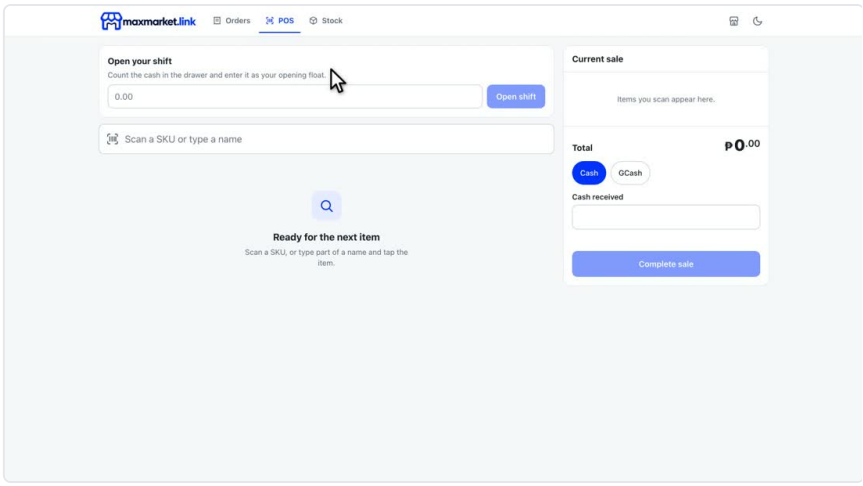
Type 1127 in Counted cash.



It says Exact. If your count is different, it says by how much.

3

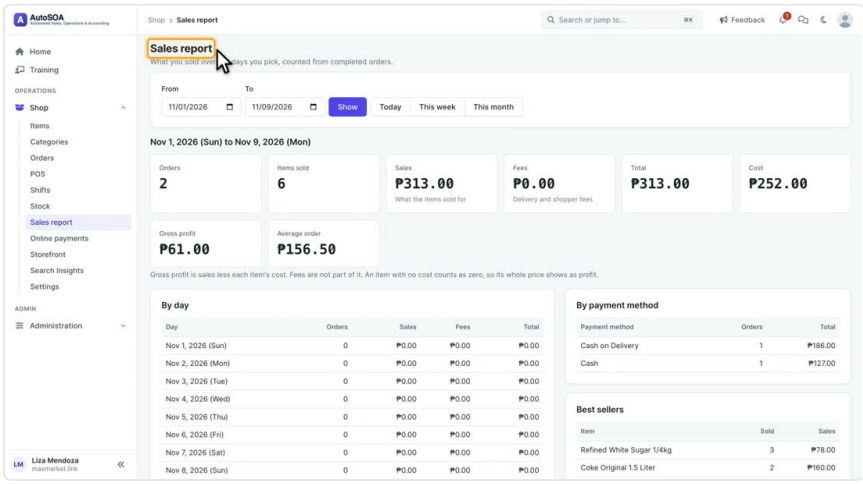
Click Close.



The shift is closed. Tomorrow, the POS asks for a new opening float. Now Liza, the owner, reads the day in the app.

4

Open Shop, then Sales report.

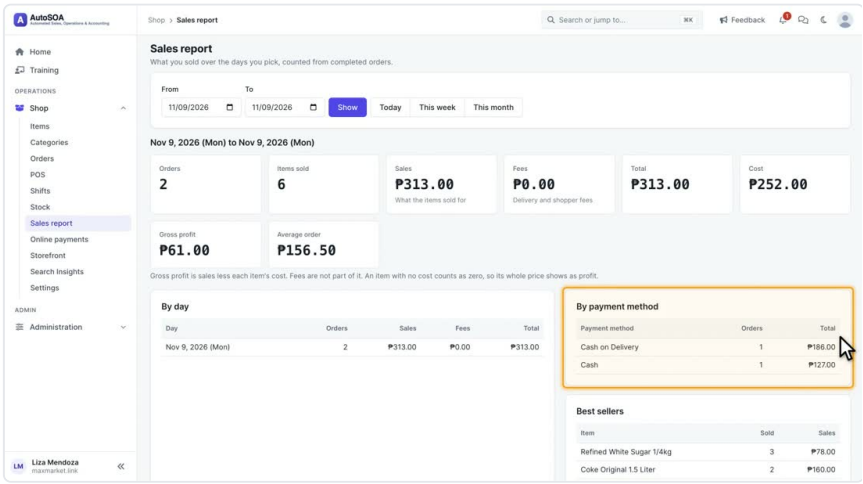


This is the Sales report. It counts completed orders, for the days you pick.

5

The report opens on this month. To read one day, pick it.

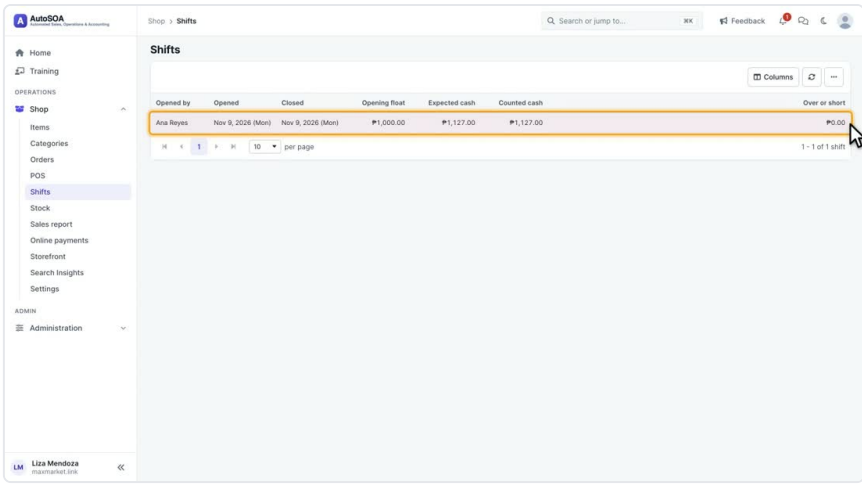
Click Today.



Now it shows today only. Orders shows 2: the two orders you finished today. Gross profit is ₱61.00. It is the sales, less what the items cost you. By payment method shows how the money came in: ₱186.00 cash on delivery, and ₱127.00 cash at the POS.

6

Open Shop, then Shifts.



This is the Shifts page. It keeps every shift, and how its count came out. Here is Ana's shift: ₱1,127.00 expected, ₱1,127.00 counted.

You closed the cash shift with a count. You saw the day's sales, profit and payments in the Sales report. Next, you list your store where customers browse for stores.

Check yourself

▼ What does Sales today count?

Today's **Completed** orders only.

▼ How do you see what to buy next?

Open **Shop**, then **Items**, and click **Quantity** to sort. Compare it with **Low stock level**. Nothing warns you by itself yet.

Lesson 18 Show up in Browse stores

For Owner · 1 min · video `shop-onboard-18.webm`

At the end you will have: The store listed for customers

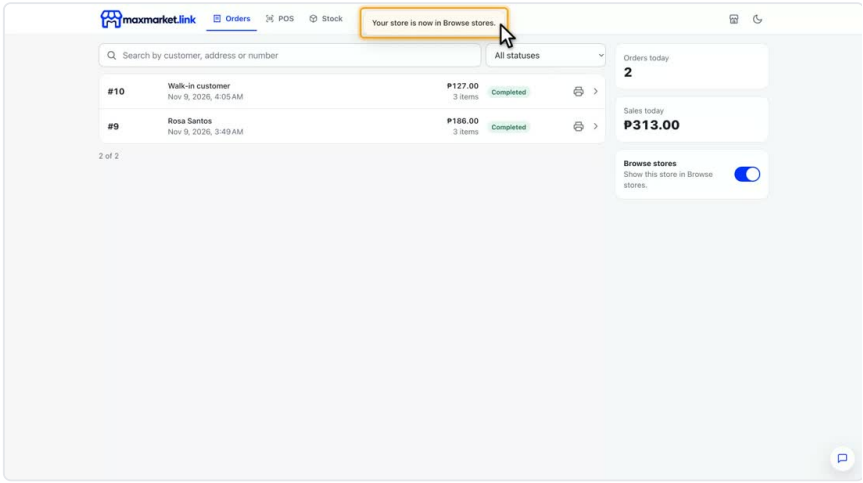
Before you start: You need your store's location from lesson 4.

Steps

1

Browse stores lists the stores customers can shop from. Your store shows there only if you say so.

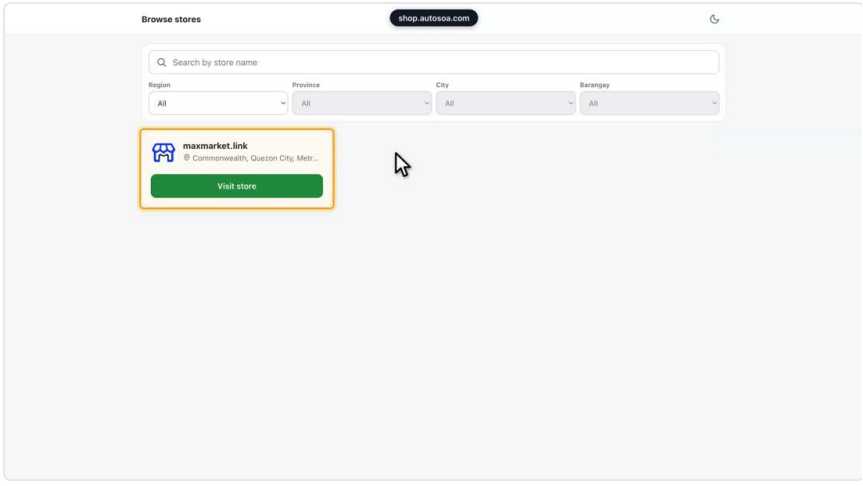
Turn on Browse stores.



A message says your store is in Browse stores.

2

Now look at it the way a customer does. Open shop dot autosoa dot com in your browser.



Here is your store in Browse stores, with your logo and your location.

You turned on Browse stores, and your store shows in the list. You can turn it off at any time. Next, you look up your orders in the app.

Check yourself

▼ What does your store need before Browse stores can show its place?

Its location, from **Store Profile**.

▼ Can you take your store out of the list?

Yes. Turn off **Browse stores** in Manage store at any time.

Lesson 19 Your orders in the app

For Owner · 1 min · video `shop-onboard-19.webm`

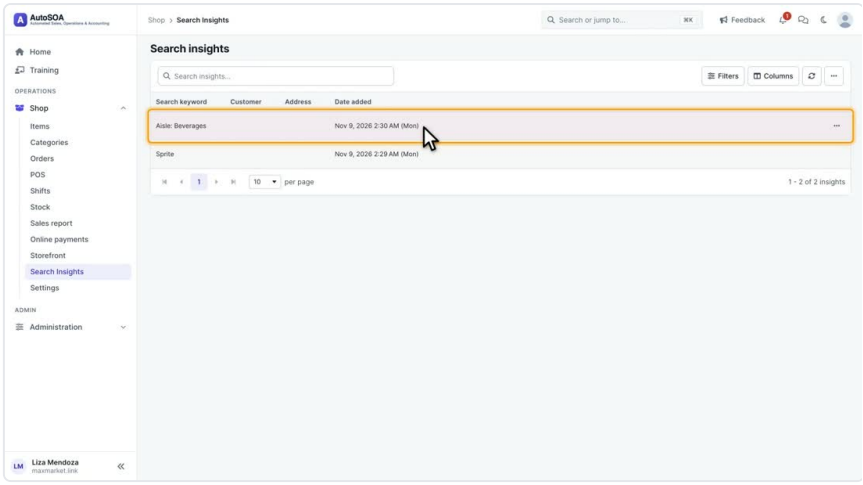
At the end you will have: An order found by name, opened in Manage store from the list; a line found in Order Items

Before you start: You need the orders from lessons 11 to 15.

Manage store is for today's work. The app keeps every order, so you can look back at any time.

Steps

1



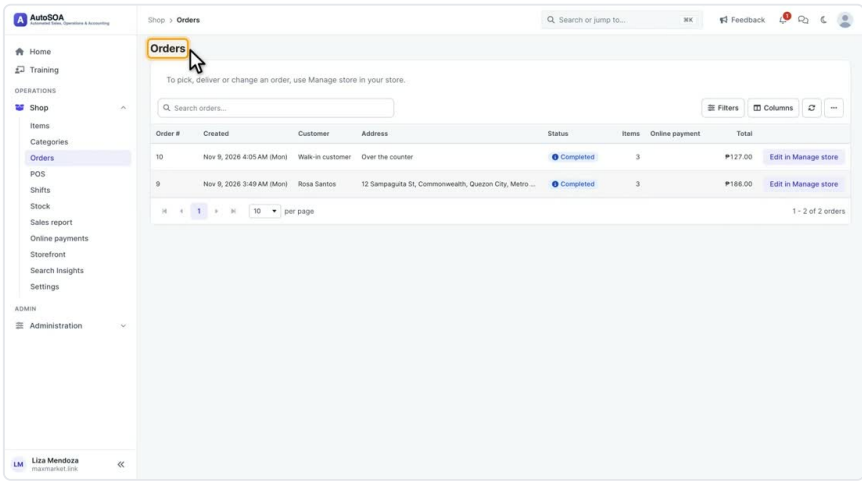
First, see what customers looked for. Open Shop, then Search Insights. This is the Search Insights page. It lists what customers searched for in your store. A search that finds nothing is an item customers want and you do not sell yet.

2

Now the orders.

Open Shop, then Orders.

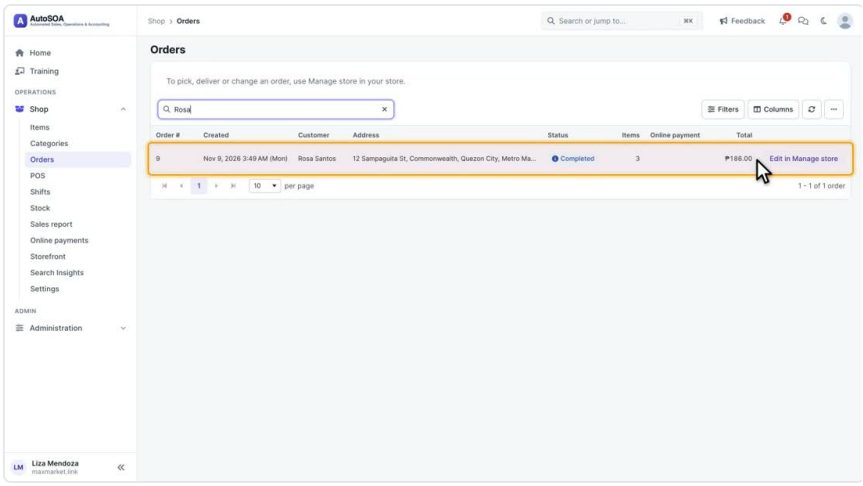
Click See every order as a list.



This is Orders. Each row is one order, with its customer, its status and its total.

3

Find “"Rosa"” in the search box.

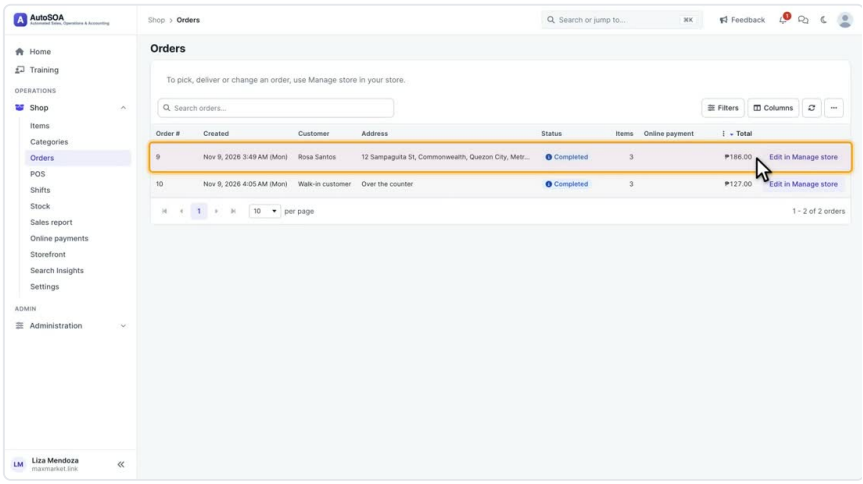


Here is Rosa's order, Completed. You can search by name, address or mobile number.

4

Click the small cross in the search box, to clear it.

Click Total twice, to sort by it.



The biggest order is now first.

You found an order by name, and you sorted your orders. Next, you change an order when a customer wants less.

Check yourself

▼ Why does the app keep your orders if Manage store has them?

Manage store is for today's work. The app is for looking back.

▼ How do you change an order you found in **Order Items**?

You cannot change it there. Open the order in Manage store.

Lesson 21 A line changes

For · 1 min · video `shop-onboard-21.webm`

At the end you will have:

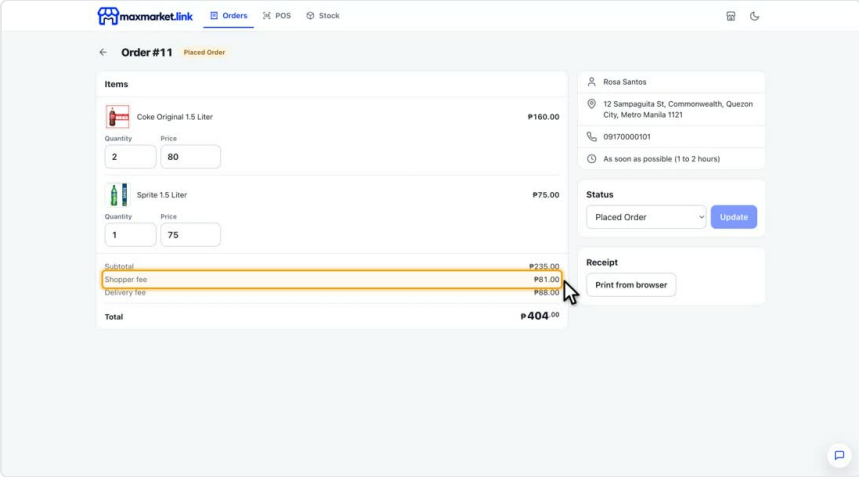
Before you start: You need the change reasons from lesson 9. Rosa has ordered two Coke and one Sprite.

This happens while you pick. Change the line, and give a reason. Then the total and the history stay right.

Steps

1

Click Rosa's new order.



This is her second order, so it pays the fees.

2

Rosa calls. She wants only one Coke.

Now the Sprite is not on your shelf.

Type 1 in Quantity beside Coke Original.

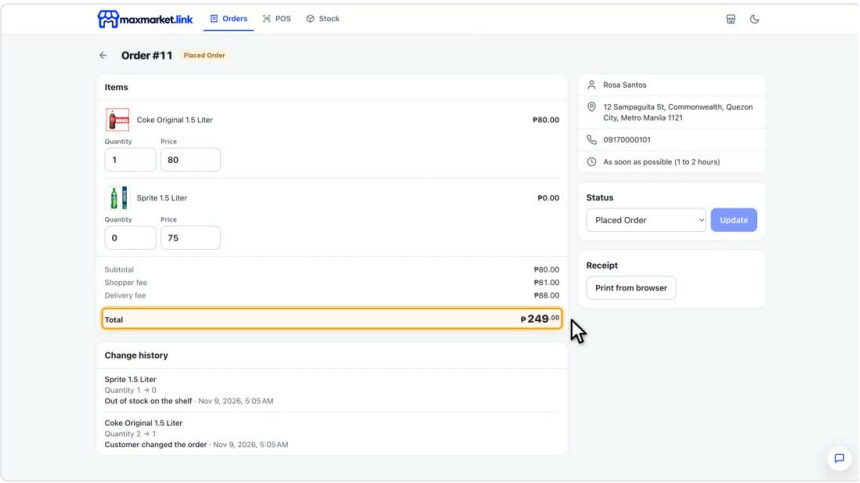
Type Customer changed the order in Why did this change?

Click Save.

Type 0 in Quantity beside Sprite.

Type Out of stock on the shelf in Why did this change?

Click Save.

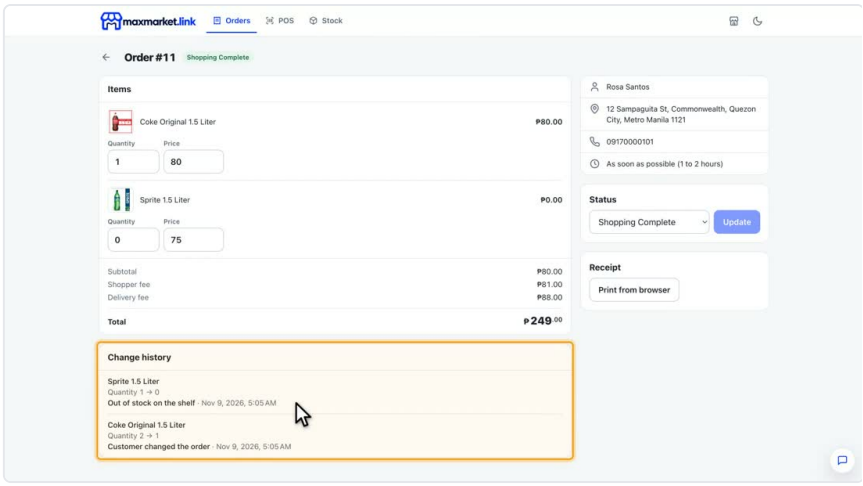


The total goes down by itself, to ₱249.00.

3

Choose Shopping Complete in Status.

Click Update.



Here is the change history: each change, its reason and its time.

You changed two lines, and each one kept its reason. The stock takes only what really left the shelf. Next, a customer cancels.

Check yourself

▼ How do you take an item off an order when it runs out?
Type 0 in **Quantity**, choose a reason, and click **Save**.

▼ What must you give for each change?
A reason, in **Why did this change?**

Common mistakes

- **The screen says:** Save or undo your line changes first.
  Do: Save the line with its reason, or undo it, before you change the status.

Lesson 22 A customer cancels

For · 1 min · video `shop-onboard-22.webm`

At the end you will have:

Before you start: You need nothing new. Rosa has ordered three Coke, and the order is picked.

Steps

1

The stock left the shelf when the order was picked. So you must give it back.

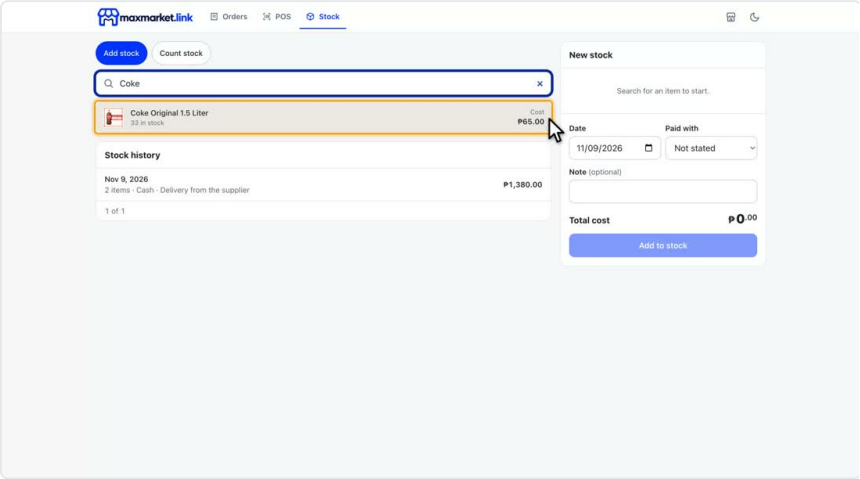
Click Rosa's order with 3 items.

Choose Canceled Order in Status.

Click Update.

Click Stock, at the top.

Find “"Coke"” in the search box.



Coke Original shows 33 in stock again. The three bottles came back by themselves.

You set the order to Canceled Order. The stock came back, and you did nothing else. Put the bottles back on the shelf. Next, a delivery comes back.

Check yourself

▼ What do you do with the stock after a cancel?

Nothing in the app: it comes back by itself. Put the items back on the shelf.

▼ Which status do you choose?

Canceled Order.

Lesson 23 A delivery comes back

For · 1 min · video `shop-onboard-23.webm`

At the end you will have:

Before you start: You need nothing new. Rosa's two Sprite are on the way.

Steps

1

The rider brings the items back. Set the order to Returned.

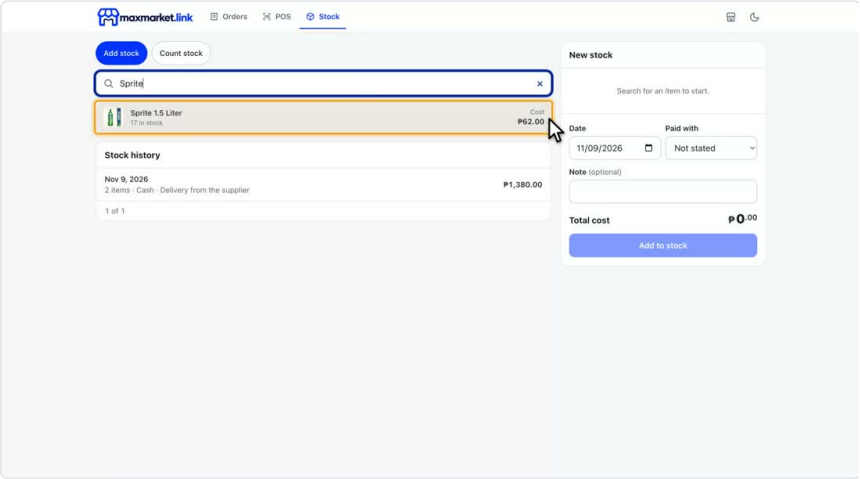
Click Rosa's order, the one in Delivery In Progress.

Choose Returned in Status.

Click Update.

Click Stock, at the top.

Find “"Sprite"” in the search box.



Sprite shows 17 in stock again. The two bottles came back by themselves.

You set the order to Returned. The stock came back, and the order does not count as a sale. Next, you correct a POS sale.

Check yourself

▼ Which status do you choose when a delivery comes back?

Returned.

▼ Does a returned order count as a sale?

No.

Lesson 24 A POS sale was wrong

For · 1 min · video `shop-onboard-24.webm`

At the end you will have:

Before you start: You need the sale from lesson 15. The customer bought one sugar, not two.

Keep the wrong sale on your record. Return it, then ring it up again. So your record stays honest.

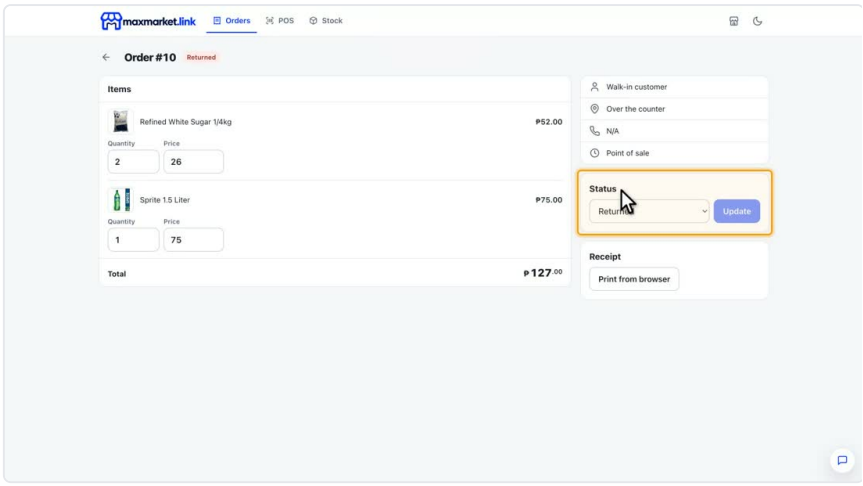
Steps

1

Click the sale from the walk-in customer.

Choose Returned in Status.

Click Update.



The stock came back, and the sale no longer counts.

2

Click POS, at the top.

Type BEV-002 in the search box.

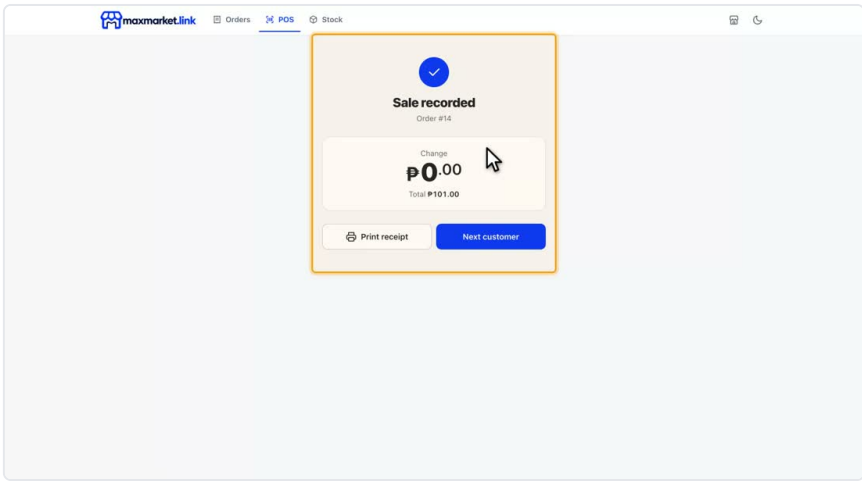
Press enter on your keyboard.

Type PAN-001 in the search box.

Press enter on your keyboard.

Click Exact.

Click Complete sale.



Sale recorded, with the right total: ₱101.00.

You set the wrong sale to Returned, and you rang up the right one. Next, you correct your stock after a count.

Check yourself

▼ Can you edit a POS sale?

No. Set it to Returned, then ring it up again.

▼ Why not?

So the record stays honest.

Lesson 25 The count does not match

For · 1 min · video `shop-onboard-25.webm`

At the end you will have:

Before you start: You need the change reasons from lesson 9.

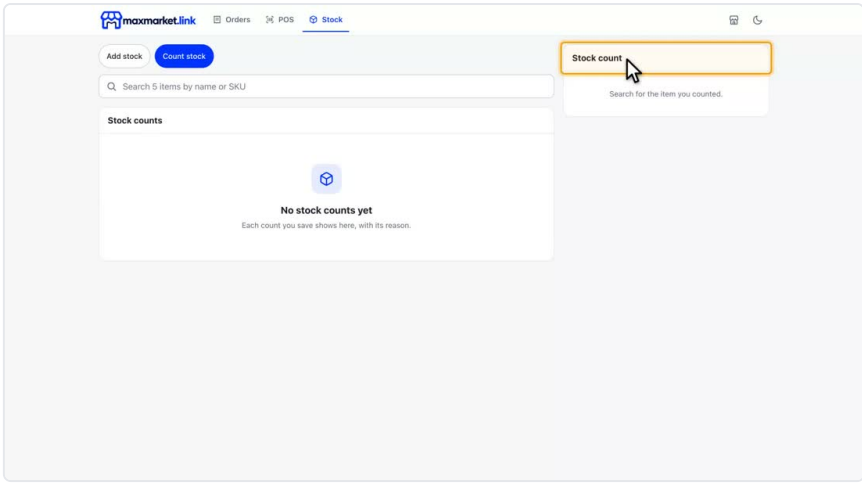
Do this after you count your shelves. An item's quantity changes only through orders, sales, deliveries and counts.

Steps

1

Click Stock, at the top.

Click Count stock.

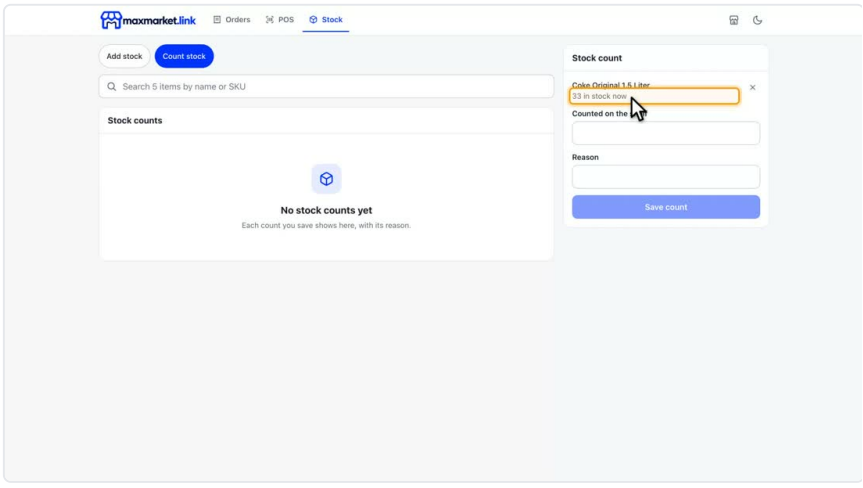


This is Count stock. Each count you save shows in the list on the left, with its reason.

2

Find “"Coke"” in the search box.

Click Coke Original 1.5 Liter.



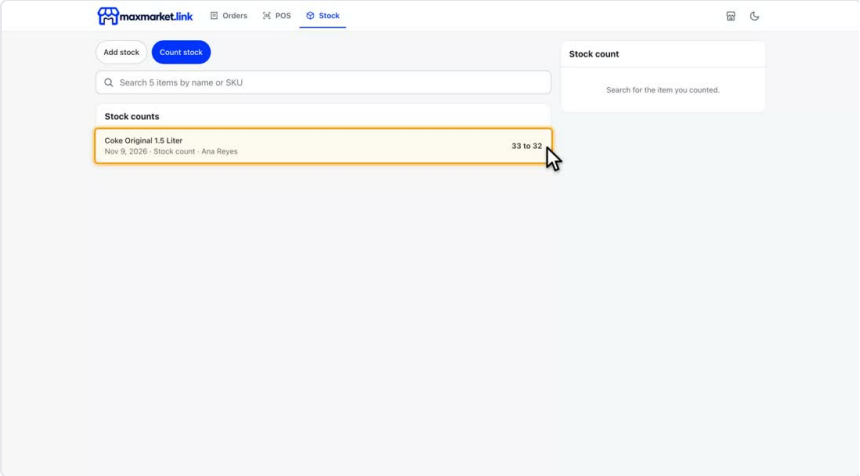
The record says 33 in stock. You count 32 on the shelf.

3

Type 32 in Counted on the shelf.

Type Stock count in Reason.

Click Save count.



Here is your count: from 33 to 32, with the reason and who counted.

You saved what the shelf holds, with a reason. The stock is right, and the record shows why it moved. Next, you change a price and start a promo.

Check yourself

▼ Where do you correct your stock?

In Manage store: **Stock**, then **Count stock**.

▼ What does the count keep?

The old and new quantity, the reason, and who counted.

Lesson 26 A price and a promo

For · 1 min · video `shop-onboard-26.webm`

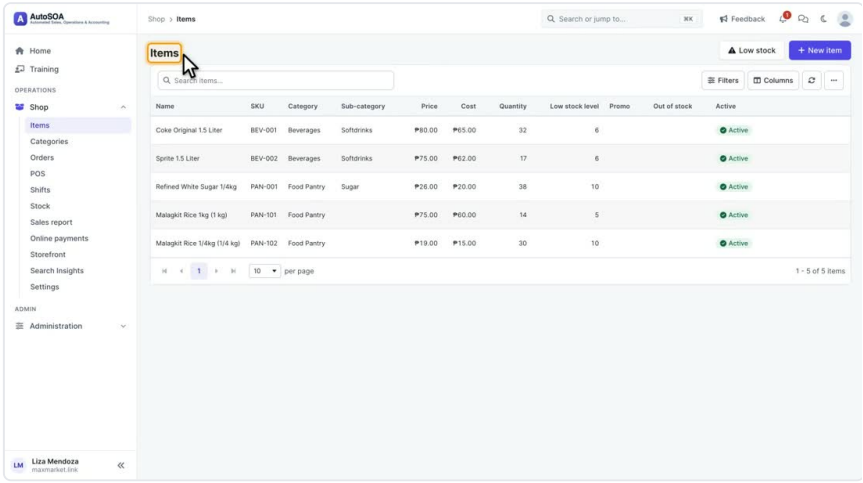
At the end you will have:

Before you start: You need the items from lesson 6.

Steps

1

Open Shop, then Items.



This is Items. Only you, the owner, change prices here.

2

Your price changes. So you change it on the item.

Quantity cannot change here. That keeps your stock honest.

A promo takes an amount off the price, from one day to another. It stops by itself.

Now open your store's address in a new browser tab.

Click the three dots beside Sprite 1.5 Liter, then click Edit.

Type 78 in Price.

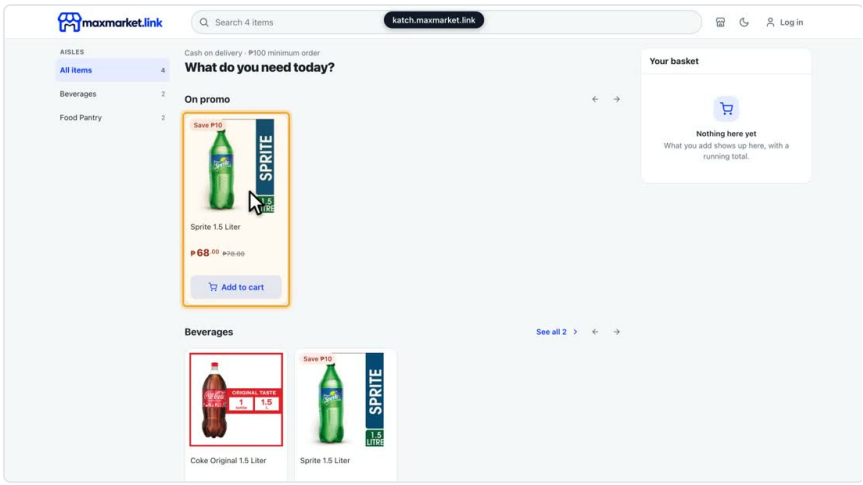
Turn on Promo.

Type 10 in Discount.

Pick today in Promo start date.

Pick a day next week in Promo end date.

Click Save.



Here is Sprite on promo, with the old price crossed out. After the end date, the price goes back by itself.

You changed a price. You started a promo that ends by itself. Next, you help a customer who forgot their password.

Check yourself

▼ What is Discount in a promo?

An amount off the price, in pesos. It is not a percentage.

▼ How does a promo end?

By itself, after **Promo end date**.

Lesson 27 A forgotten password

For · 1 min · video `shop-onboard-27.webm`

At the end you will have:

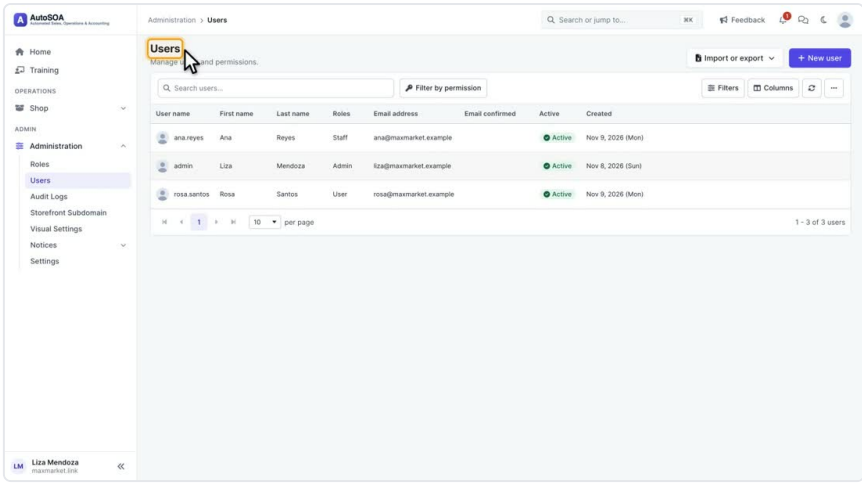
Before you start: You need the customer's name. Only you, the owner, can do this.

A customer can use the link on the sign-in page, and follow the email. If Rosa cannot do that, she calls your store, and you give her a new password.

Steps

1

Open Administration, then Users.



This is Users. It lists your staff and your customers.

2

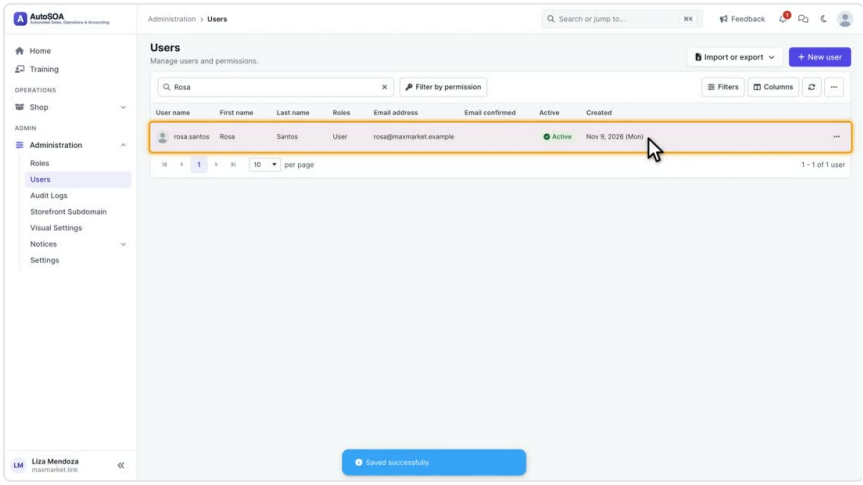
Find “"Rosa"” in the search box.

Click the three dots beside Rosa, then click Edit.

Type a new password in Password.

Type it again in Password (repeat).

Click Save.



Rosa's account is saved. Tell her the new password by phone, not by message.

You found the customer and gave her a new password. Next, you see what happens when the internet drops.

Check yourself

▼ How can a customer get back in by themselves?

They click **Forgot password?** on the sign-in page, and follow the email.

▼ Who can give a customer a new password?

You, the owner, in **Users**.

▼ How do you tell the customer?

By phone, not by message.

Lesson 28 The internet drops

For · 1 min · video `shop-onboard-28.webm`

At the end you will have:

Before you start: You need the POS open before the internet drops.

The POS keeps your items on your device. So a sale does not need the internet.

Steps

1

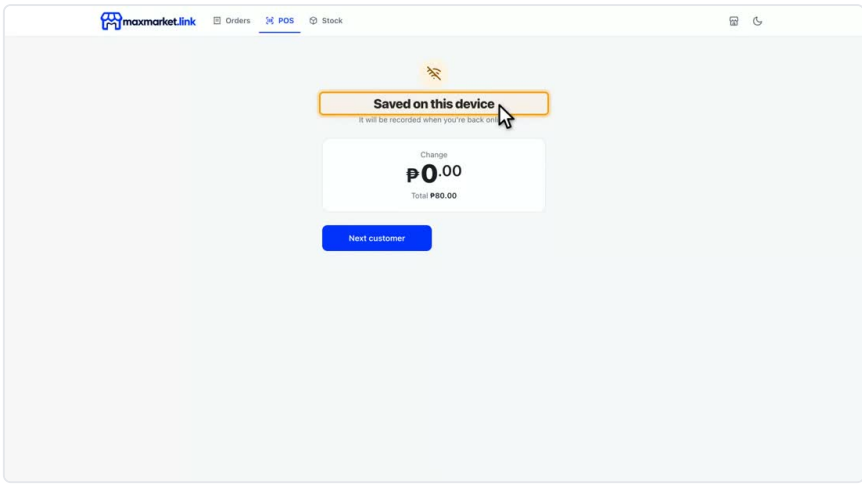
This lesson turns the internet off. Sell as usual.

Type BEV-001 in the search box.

Press enter on your keyboard.

Click Exact.

Click Complete sale.



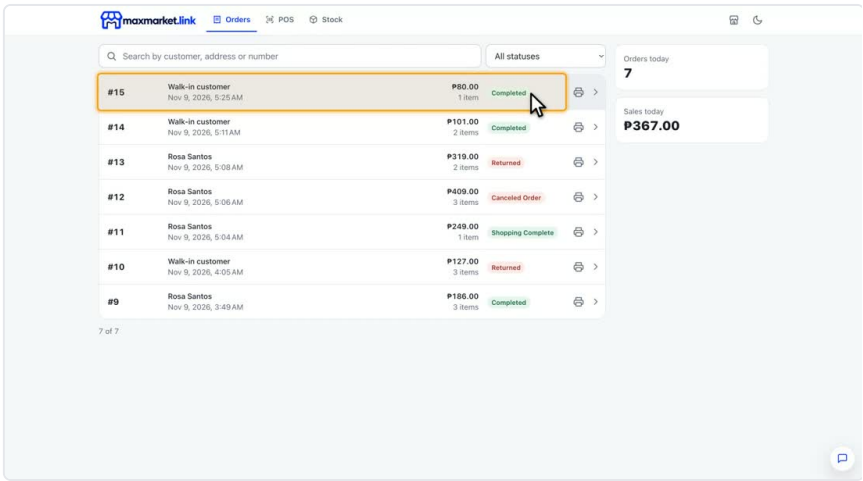
Saved on this device. The sale waits here until the internet returns.

2

The internet is back. The POS sends the sale by itself. You do nothing.

Click Next customer.

Click Orders, at the top.



Here is the sale in your orders, Completed.

You sold with no internet. The sale waited on your device, then it sent itself. Next, a customer starts to pay online, and does not finish.

Check yourself

▼ What must be open before the internet drops?

The POS.

▼ What happens to a sale saved on the device?

It sends itself when the internet returns.

Lesson 29 A customer did not finish paying

For · 2 min · video `shop-onboard-29.webm`

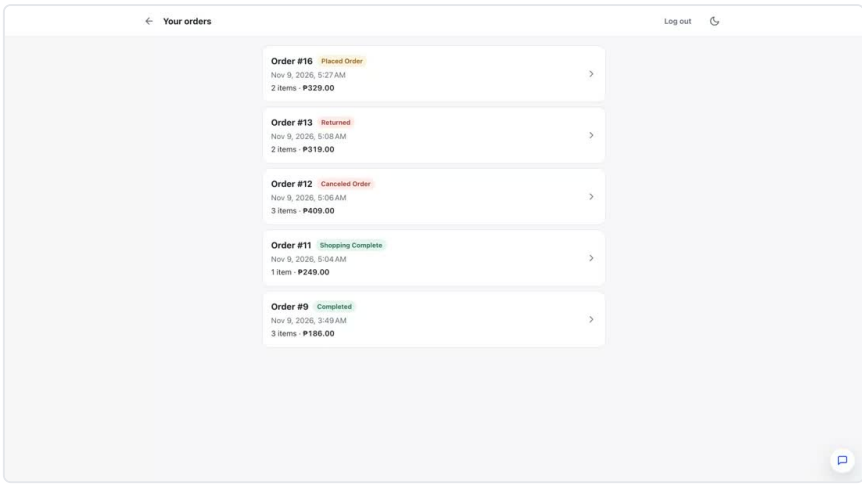
At the end you will have:

Before you start: This is Rosa's order of two Coke, from today. It was made for this lesson.

The order is placed, but not paid. Staff should not deliver it until it is paid.

Steps

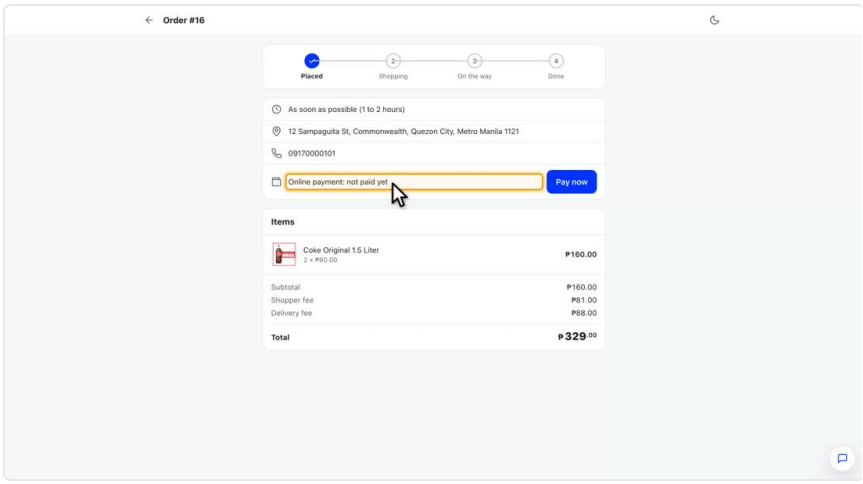
1



Rosa chose Pay now online. On the payment page, she stopped, and closed it.

2

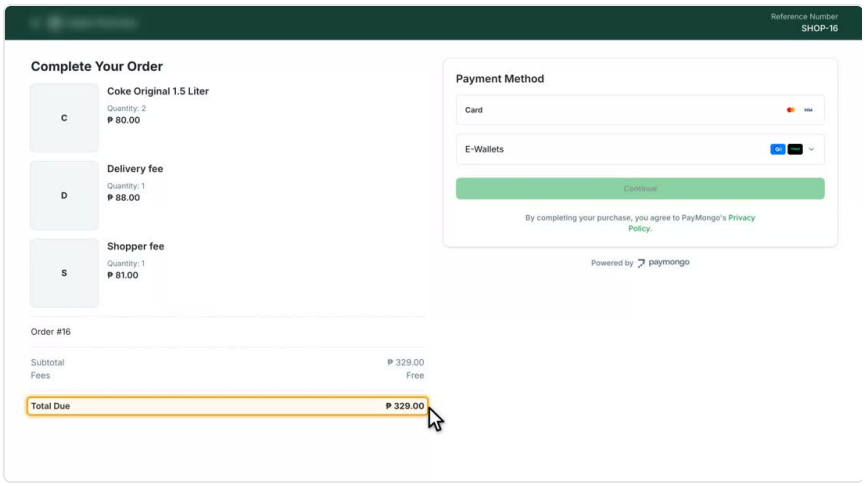
Click Order #16.



It says Online payment: not paid yet. The Pay now button takes her back to pay.

3

Click **Pay now**.



This is PayMongo's payment page, with the order and its total. It is the same page she left: nobody pays twice.

4

Click **E-Wallets**.

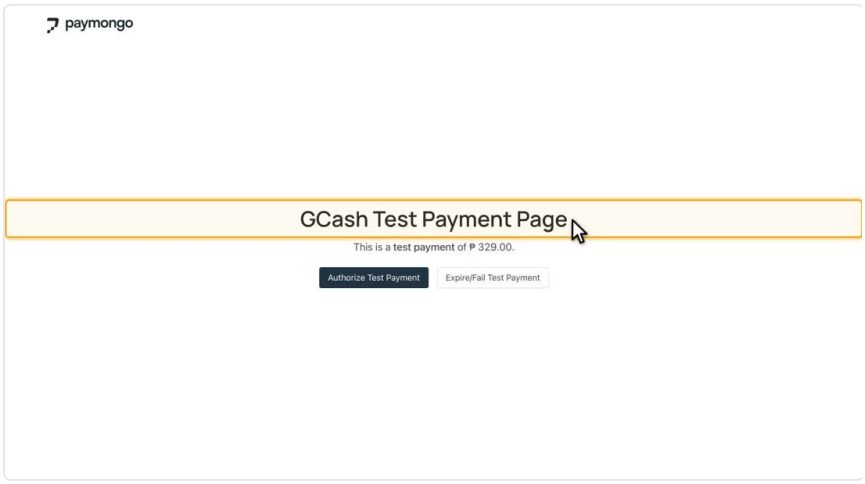
Click **GCash**.

Click **Continue**.

Type the customer's name in **Name**.

Type the customer's email in **Email**.

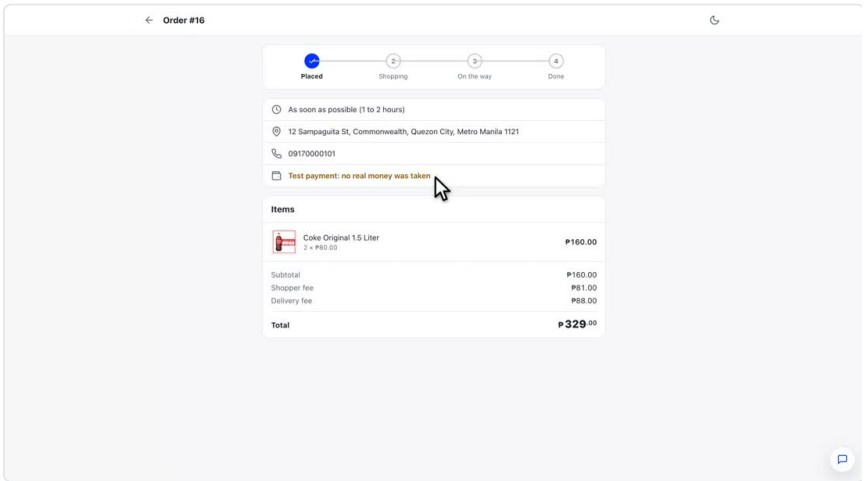
Click **Pay**.



With a test key, a test page shows instead of GCash. With your live key, the customer pays in GCash here.

5

Click **Authorize Test Payment**.



PayMongo sends Rosa back to her order. The store asks PayMongo at once, and marks the order paid. Here it is: Test payment, no real money was taken. With your live key, it says Paid online. If a customer leaves before paying, they click Pay now on their order. Deliver only an order that says Paid online.

You have finished the course. Keep the printed guide beside your counter.

Check yourself

▼ Should staff deliver an order that says Online payment: not paid yet?

No. Deliver only an order that says **Paid online**.

▼ Does the customer pay twice if they click Pay now again?

No. It opens the same payment page they left.

Common mistakes

- **The screen says:** The order still says not paid after the customer paid.
  Do: Open the order again in a few minutes. The store checks with PayMongo by itself.

When something goes another way

A customer changes a quantity, or an item runs out while picking

1. Open the order in Manage store.
2. Type the new quantity in **Quantity**. Type 0 if the item ran out.
3. Choose a reason in **Why did this change?**
4. Click **Save** on the line.
5. Carry on with the order.

Change the line and give a reason; type 0 for an item that ran out. Staff have no Remove button

Lesson 21

A customer cancels

1. Open the order in Manage store.
2. Choose **Canceled Order** in **Status**, and click **Update**.
3. Put the items back on the shelf.

Set **Canceled Order; the stock comes back by itself**

Lesson 22

A delivery is refused or returned

1. Open the order in Manage store.
2. Choose **Returned** in **Status**, and click **Update**.
3. Put the items back on the shelf.

Set **Returned; the stock comes back by itself**

Lesson 23

A POS sale was rung up wrong

1. Open the sale in Manage store.
2. Choose **Returned** in **Status**, and click **Update**.
3. Open **POS**, and ring up the right sale.

Set the sale to **Returned in Manage store, then ring it up again**

Lesson 24

The stock count does not match the shelf

1. Open **Stock**, then click **Count stock**.
2. Find the item, and click it.
3. Type what is on the shelf in **Counted on the shelf**.
4. Choose a reason, and click **Save count**.

Manage store › Stock › **Count stock, with a reason**

Lesson 25

A price changes, or an item goes on promo

1. In the app, open **Shop**, then **Items**.
2. Edit the item, and type the new **Price**.
3. For a promo, turn on **Promo**, type the **Discount**, and pick both dates.
4. Click **Save**.

Change the price on the item; a promo has an end date and stops by itself

Lesson 26

A customer forgets their password

1. The customer clicks **Forgot password?** on the sign-in page, and follows the email.
2. If they cannot: in the app, open **Administration**, then **Users**.
3. Find the customer, and edit them. Type a new password twice.
4. Click **Save**, and tell the customer by phone.

They click Forgot password? and follow the email. If they cannot, the owner sets a new password in Users

Lesson 27

The internet drops

1. Keep selling at the POS.
2. Complete each sale. It says **Saved on this device**.
3. When the internet returns, do nothing. The sale sends itself.

Keep selling; the sale sends itself when the connection returns

Lesson 28

A customer chose Pay now online but did not finish paying

1. Ask the customer to open **Your orders** in the store.
2. They click the order, then **Pay now**.
3. They pay on PayMongo's page.
4. The order says **Paid online**. Then deliver it.

If a customer leaves before paying, they click Pay now on their order. Deliver only an order that says Paid online.

Lesson 29

Cheat sheet

When	Task	Where	Lesson
Every day	See new orders	Manage store › **Orders**	12
Every day	Move an order	Open the order › **Status** › **Update**	12
Every day	Sell at the counter	Manage store › **POS**	15
Every day	Open your cash shift	Manage store › **POS** › **Open shift**	14
Every day	Close your cash shift	Manage store › **POS** › **Close shift**	17
Every day	Check your sales	**Shop** › **Sales report** › **Today**	17
Each delivery	Record new stock	Manage store › **Stock**	16
Each week	See what to buy next	Manage store › **Stock** › Running low	16
Each week	See what customers searched for	**Shop** › **Search Insights**	19
Any time	Look up an old order	**Shop** › **Orders** › **See every order as a list**	19
Any time	Add an item	**Shop** › **Items** › **New item**	6
Any time	Add an item in sizes	**Shop** › **Items** › **New item** › **Option of**	7
Any time	Add a staff member	**Administration** › **Users** › **New user**	2
Any time	Take GCash, Maya and card	**Shop** › **Online payments**	10
Something went wrong	A line changes	Open the order › **Quantity** › a reason › **Save**	21
Something went wrong	A customer cancels	**Status** › **Canceled Order**	22
Something went wrong	A delivery comes back	**Status** › **Returned**	23
Something went wrong	A POS sale is wrong	**Status** › **Returned**, then ring it up again	24
Something went wrong	The shelf and the record differ	**Stock** › **Count stock**	25
Something went wrong	A customer forgets a password	**Administration** › **Users**	27
Something went wrong	The internet drops	Keep selling at the **POS**	28
Something went wrong	A customer did not finish paying	They click **Pay now** on their order	29

Glossary

Term	What it means for your business	Where you see it
The app	Where you set up your store: items, team and settings.	AutoSOA, after you sign in
Manage store	Where your staff do daily work: Orders, POS and Stock.	The menu under your letter in the store
The store	What your customers see.	Your store's address
Show customers how many are left	Off: the store says In stock or Sold out. On: it shows the number left. Staff always see the number.	Shop › Storefront
Shop	The app's menu for your store.	Left menu
Administration	The app's menu for your team and settings.	Left menu
Role	A list of things a person can do.	Administration › Roles
Permission	One thing a person may do.	Administration › Roles › Permissions
Category	A big aisle in your store.	Shop › Categories
Sub-category	A smaller aisle inside a category.	Shop › Categories › Item sub-categories
SKU	Your own code for an item. A scan at the POS finds the item by it.	Items, POS
Cost	What you pay for an item. Customers never see it.	Items
Low stock level	The quantity you want to buy more at. It is for you to read. Nothing warns you yet.	Items
Option	An item sold as a choice under another item, like a smaller size. It keeps its own price, cost and stock.	Shop › Items › Option of; the store shows one card with a choice
Option label	The name of a choice that the customer picks, like 1 kg.	Shop › Items › Option label
Running low	The items at or below their low stock level.	Manage store › Stock
Basket	What a customer is about to buy.	The store
Minimum order	The smallest order the store takes: ₱100.	The store
Secret key	The key from your PayMongo account that lets your store start a payment. Keep it private.	Shop › Online payments
Test key	A PayMongo key to test the checkout. No real money moves, and the order says Test payment.	Shop › Online payments, with the Test key label
Pay now online	The checkout choice that sends the customer to PayMongo, to pay with GCash, Maya or card.	The store's checkout; Pay now on the customer's order
Order status	A step an order goes through.	Shop › Settings › Order statuses; the order's page
Picking	Taking an order's items from the shelf.	The order's page
Change reason	Why a line or a count changed.	Shop › Settings › Change reasons
POS	Point of sale: selling at the counter.	Manage store

Cash shift	One staff member's time at the POS: it opens with the opening float and closes with a count.	Manage store › POS; Shop › Shifts
Opening float	The cash already in the drawer when the shift opens.	Manage store › POS › Open shift
Expected in the drawer	The opening float plus every cash sale: the cash that the drawer should hold.	Manage store › POS
Counted cash	The cash you count in the drawer when you close the shift.	Manage store › POS › Close shift
Stock-in	A delivery you record.	Manage store › Stock
Stock count	What the shelf really holds, saved with a reason.	Manage store › Stock › Count stock
Sales today	Today's completed orders, in pesos.	Manage store › Orders
Sales report	Completed orders, profit and payments, for the days you pick.	Shop › Sales report
Gross profit	The sales, less what the items cost you.	Shop › Sales report
Search insight	What customers typed in your store.	Shop › Search Insights
Browse stores	The list of stores customers can shop from.	The store's top menu
Subdomain	The first part of an address, such as shop in shop.yourbusiness.com.	Administration › Storefront Subdomain

Go-live checklist

The implementer

✓	Step
☐	Create the account with the module **Shop** (host: **Tenants** › **Create**).
☐	Run the Shop permissions script for the account's Admin role (`products/Shop/seed/grant_shop_permissions.sql`), then restart the API.
☐	Set the store's sign-up and address settings.
☐	Check that the first sign-in shows **Shop**, and that the store opens at its address.
☐	For online payment: the client pastes their own PayMongo live key in **Shop** › **Online payments**. Never type it for them.

Your team

✓	Step
☐	Return the questionnaire.
☐	Check your time zone (lesson 1).
☐	Add your staff (lesson 2).
☐	Set your look and location (lessons 3 and 4).
☐	Add your aisles and items, with their sizes (lessons 5 to 7).
☐	Add your change reasons (lesson 9).
☐	Connect PayMongo with your live key, if you take online payment (lesson 10).
☐	Run one full order, one cash shift and one POS sale with your implementer watching (lessons 11 to 17).

Signed off by _____ (implementer) and _____ (client) on _____

Getting help

To be filled in before this guide goes to the client: your implementer's name, email address and phone number.