

Building the Cart

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A sale starts by adding products to the cart. You can search by name, scan a barcode, or type the barcode by hand. Then you can adjust quantities, apply a discount or extra fee, attach a customer, and add a note before taking payment.

Add products

There are three ways to add a product:

1. **Search by name or SKU** — type in the search bar at the top of the POS screen. Tap the product to add it to the cart.
2. **Scan a barcode** — point your scanner at the barcode. If exactly one product matches, it goes straight into the cart.
3. **Type a barcode and press Enter** — when the typed value is 8 digits or more and exactly one product matches, it's added to the cart automatically. Otherwise, search results appear so you can pick one.

“ **Tip:** If a scan or typed barcode shows search results instead of going to the cart, more than one product shares that code. Pick the right one from the list.

Edit a line in the cart

Tap any line in the cart to edit it:

- **Quantity** — tap the quantity to change how many.
- **Price** — override the line price (useful for damaged stock or one-off pricing).
- Remove the line entirely from the line's actions.

Add a discount or extra fee

Use **Add Discount** to take an amount off the order, or **Add Fee** to add a charge (for example, a custom labor fee). Both let you enter:

- A name (e.g. "Loyalty discount" or "Drilling fee")
- An amount, as either a flat value or a percentage

The discount or fee shows as its own line in the cart and is reflected in the totals.

Attach a customer

Tap **Add Customer** to attach the sale to a customer. You can:

- Search the customer list, or
- Create a new customer right from the cart — the new customer is added to your database and attached to this sale.

Attaching a customer is required if you want to email a receipt or look up the sale later by customer.

Add a note

Tap **Order Note** to add a note that is saved with the order. Notes are visible to anyone who opens the order later in **Orders**.

Ready to take payment

When the cart looks right, tap **Checkout**. See *Taking Payment* for the cash and card flows.

Revision #1

Created 31 May 2026 16:33:54 by Luis Javier Rodriguez

Updated 31 May 2026 16:33:54 by Luis Javier Rodriguez