Streamline POS

Complete Reference Manual — every screen, setting, and button

Version 4.94.1 | WordPress Plugin Reference Manual

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1. Overview & Installation

Streamline POS is a full point-of-sale terminal built directly on WooCommerce — the same products, stock, and customers you already manage, sellable from a fast in-store checkout screen. Beyond the register itself, it includes Equipment Rental, Repairs & Work Orders, a Class Roster for dive courses, configurable Discount Programs, WooCommerce coupon codes at checkout, a Reordering Report, per-user permissions, and a built-in Extensions panel that plugs in the rest of the Streamline plugin suite (Rewards, Gift Cards, Travel, and more) right inside the POS.

Requirement	Minimum
WordPress	**6.0 or higher**
WooCommerce	**8.0 or higher (required)**
PHP	**8.0 or higher**
Browser	**Chrome, Firefox, Safari, or Edge (latest)**

Installation

1. Upload the plugin to `/wp-content/plugins/streamline-pos/` and activate it from the **Plugins** menu.
2. Click **Streamline POS** in the WordPress admin menu.

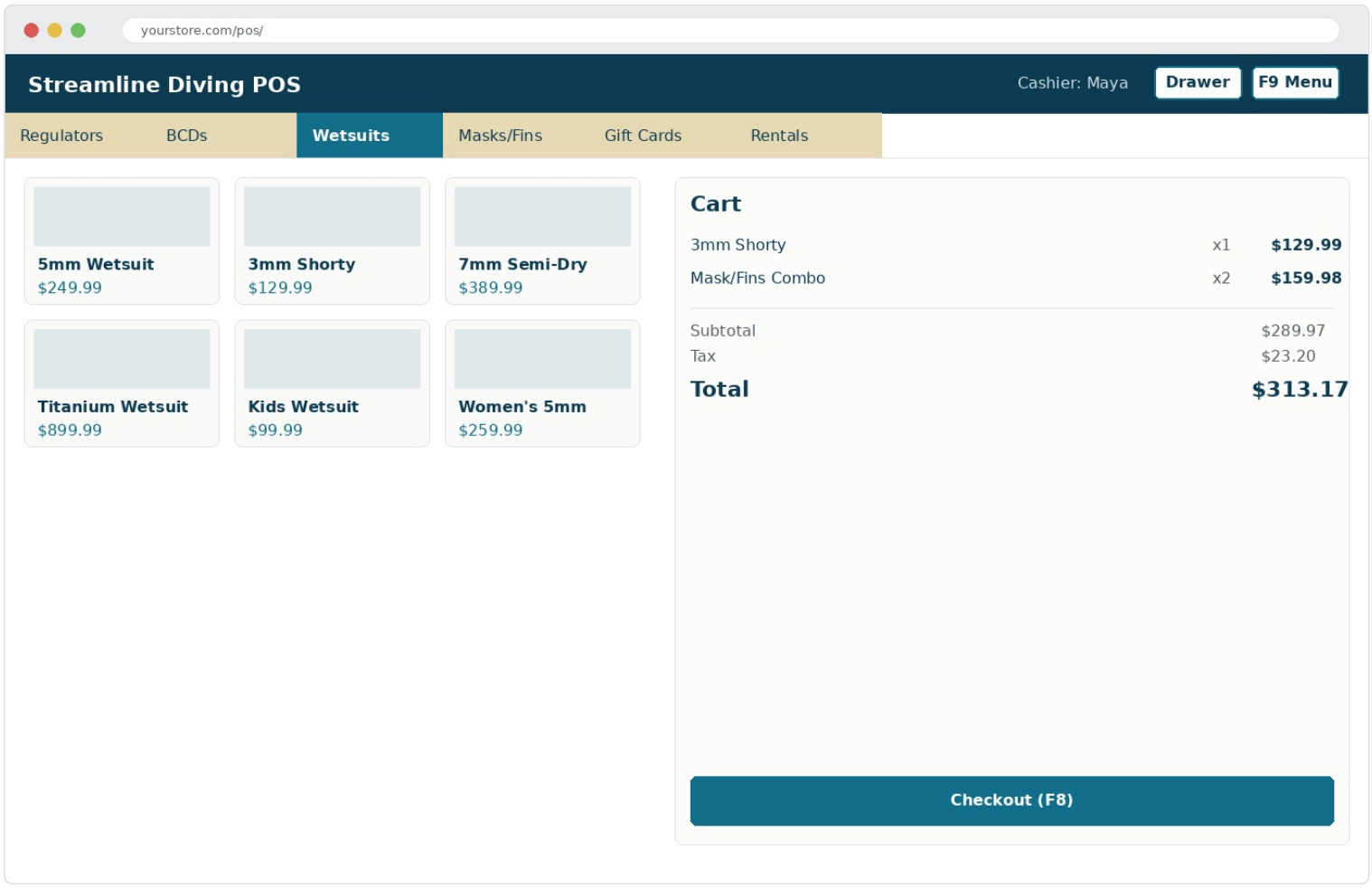
> **First login:** a default admin user is created automatically with username `admin` and password `admin`. Change this immediately: click **Users** in the header, click **Edit** on the admin account, and set a new password (Section 17).

> **New in 4.93.8 — Administrators and Shop Managers can skip the POS login screen entirely.** If you're already signed into WordPress as an Administrator or Shop Manager and you open the POS, it now checks whether your WordPress username or email matches an existing POS user account (Section 17) — if it does, you're logged into the POS automatically as that matched user, with no login screen at all. This only happens once per page load: if you log out to hand the register to someone else, the login screen appears normally and won't auto-fill itself again. If no matching POS account is found, nothing changes — the login screen shows as usual so you can sign in manually or set one up. This does not apply to the no-login frontend URL (Section 27), which still always shows its own login screen regardless of any WordPress session.

Quick Setup Checklist

1. Configure store information (Settings → Appearance)
2. Set up categories (Settings → Categories)
3. Create POS users (header → Users) and set their detailed permissions (Settings → Users) — Section 17
4. Configure payment methods (Settings → Payments)
5. Set up your receipt/label printer (Settings → Labels & Printers)
6. Assign products to categories
7. If you use any other Streamline plugins, grant the relevant Extensions permissions per user (Section 26)
8. Run a test transaction

2. The Main POS Screen



The main terminal — category tabs, product grid, and cart.

The main screen has four regions:

- **Header — store logo/name, the current cashier and their role badge, a register switcher (if more than one register is configured), and a row of quick-access buttons (below)**
- **Category Tabs — your configured main categories, each optionally with subcategories; drag tabs to reorder**
- **Product Grid — a 6-column grid with product images, prices, and per-tile actions (Section 3)**
- **Shopping Cart — line items with quantities, inline price editing (if permitted), subtotal/tax/total, and the Checkout button**

> **An ON SALE ribbon now marks discounted products at a glance — a red "SALE" tag with the regular price struck through next to the sale price, shown on any product tile with a sale price set that's lower than its regular price. It appears on the main POS product grid here, in the shopping cart, in the search-results popup (below), and in Settings → Categories both when searching for a product to assign and in the list of already-assigned products (Section 15). Before this, a discount only showed up as a lower number you'd already have to know to look for.**

A stale WooCommerce cache could previously hide a real sale from the ribbon and from "Show Only Products on Sale" (Section 15). The "is this on sale" check used to also require WooCommerce's separately-cached current-price field to already reflect the discount, as an extra safety check — and that field can be left stale (not yet refreshed) when a sale is applied in a way that writes to the database directly rather than through the product editor's own Update button, even though the sale price and regular price are both set correctly. Comparing sale price to regular price directly is what "on sale" actually means, so that's now the only check. If a product's sale still doesn't show here after this update, open that product (or the specific variation) in the WordPress product editor and click Update once — this fix corrects what the POS shows and filters by, but it can't reach into WooCommerce's own cached price and refresh it for you.

Header Quick-Access Buttons

These sit in the top-right of the main screen. Each is permission-gated — a cashier without the relevant permission simply doesn't see that button at all.

Button	Opens	Requires
Cash Drawer	Opens the Cash Drawer Count tool — count denominations, then Open or Close a drawer for shift tracking (Section 14)	No Sale permission
Orders	The Orders screen (Section 7)	Always visible
Reordering	The Reordering Report (Section 8)	Always visible
Inventory	The Inventory screen (Section 10)	Inventory management access
Reports	The Reports window (Section 14)	View Reports permission
Users	A quick User Management modal (Section 17)	Administrator role only
Extensions	The Extensions panel (Section 26)	Manage Extensions permission
Settings	The full Settings screen (Sections 14–23)	Access Settings permission
Logout	Returns to the login screen and clears the cart	Always visible

> **Two different "Users" screens:** the header's Users button and the Settings → Users tab are not the same screen — see Section 17 for exactly how they differ and how they relate to each other.

Search

The search bar supports four modes simultaneously — type into it and the POS matches across all of them:

- **Product Name** — any part of the name
- **SKU Search** — the exact SKU
- **Barcode Scan** — scan with a connected barcode scanner (most scanners act as a keyboard and send an Enter keystroke after the code, which the POS treats as "search and add")
- **Customer Search** — name, email, or phone

A product search with more than one match opens a **Search Results** popup listing every match — click any result to add it to the cart. Sale pricing shows there too: the same ON SALE ribbon and struck-through regular price described above.

> **Tip:** pair the search bar with a barcode scanner for near-instant lookup — scan and the item drops straight into the cart.

> **Fixed in 4.93.5 — a fast typist could briefly see the wrong results.** Every keystroke here starts its own lookup, and the one for a shorter, broader search (e.g. "BC") can take longer and come back after the one for what you'd already finished typing ("BCD-N2") — replacing the

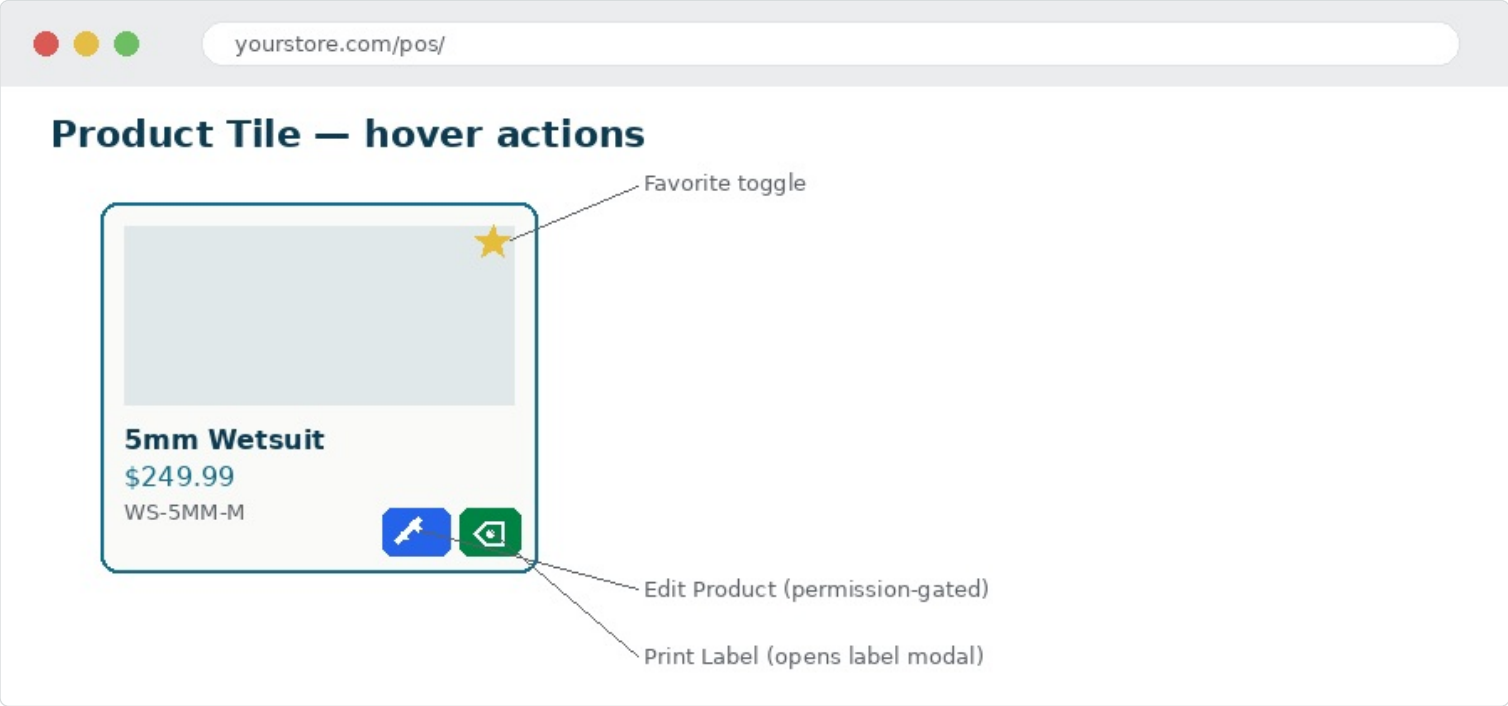
correct, more specific results with the stale broader ones, which previously stuck until you deleted and retyped the last character. The POS now always discards an answer that isn't for whatever is currently typed, and the box shows **Searching...** for the whole time a lookup is pending instead of flashing the old results first. This same fix applies everywhere else the POS searches as you type: customer search (here, Add Customer, Quotes, and Work Orders), Show Product to Customer (Section 24), parts search in Repairs (Section 12), and Reordering's Add Product and category product-assignment searches (Sections 8, 14).

Registers / Drawer Names

If your shop runs more than one till (configured in Settings → General, Section 24), a register switcher appears in the header. Cashiers pick which register they're using, and cash drawer activity, per-register payment gateway overrides (Section 21), and per-register printer overrides (Section 22) are all tracked separately by register name. Switching registers can itself be permission-gated — see the "Change Register" permission in Section 17.

If Customer-Facing Display is enabled (Section 24), a 🖥 **Close Customer Display** button also appears next to the register indicator, for closing a display you can't physically reach. If Advertisement Display is enabled too, a 🖼 **Show Product to Customer** button appears alongside it — see Section 24 for what each one does.

3. Product Tiles — Favorites, Edit Product & Print Label



Every product tile carries three overlay actions, independent of adding it to the cart.

Clicking anywhere on a product tile adds it to the cart, but each tile also carries up to three small overlay buttons that don't affect the cart at all:

Icon	Action	Requires
Favorite star (top-right)	**Toggle this product as this cashier's personal favorite (bookmarks it for quick access — see the note below)**	**Always available**
Edit Product (bottom, blue)	**Opens the full Edit Product modal for this item**	**Edit Product Details permission**
Print Label (bottom-right, green)	**Opens the Print Label modal for this item**	**Always available**

A tile also shows a location line if the product has Main Section / Sub-Location data (from SL Inventory & Stock Location Management, if active), and up to two attribute lines for variations (e.g. Color: Black).

> **Not the same as the "default startup" star: this product-tile star only bookmarks an individual product for faster access — it has no effect on which category or subcategory the POS opens to. That's a completely different setting, found on the category/subcategory rows in Settings → Categories (Section 15).**

Edit Product

Opens a full product editor without leaving the POS — the same underlying WooCommerce product, edited in place:

Field	Notes
Product Name, SKU	Basic identification
Retail Price, Cost, Stock Qty	Pricing and on-hand quantity
Brand / Vendor	A searchable dropdown of your existing brand terms
Main Section, Sub-Location	Only meaningful with SL Inventory & Stock Location Management active — see that plugin's manual

Barcode / GTIN	For barcode scanning and label printing
WooCommerce Taxable	Whether this product is taxed at checkout
Weight, Length, Width, Height	Shipping dimensions
Description	The product's WooCommerce description
WooCommerce Categories	Assign or change which categories this product belongs to
Manage Stock	Toggle WooCommerce stock tracking for this product on/off

Live data: opening Edit Product fetches the product's current data fresh (a brief "Loading product data..." state appears) rather than relying on whatever was last cached in the product grid, so you're always editing accurate values.

Editing a variation's categories: most variations don't carry their own categories — they use whichever categories are assigned to the parent product. When that's the case, the editor shows a line explaining that these are the parent's categories, and saving a change here updates the parent product rather than the variation. A variation that does have its own categories assigned is edited in place as normal.

Fixed in 4.93.2 — removing a category didn't stick. Through 4.93.1, unchecking a category in Edit Product (reachable from the product grid here, the Reordering Report, and the product info popup) could fail to save: after saving, the removed category came back and any newly checked ones were added on top of it instead of replacing it. This happened specifically on sites running a plugin that hides categories from the shop, such as SL Category Hider — its filter made WordPress believe the product had no categories at all when the POS checked, so a save could only add categories, never remove one. This is fixed in 4.93.2: the POS now sets a product's categories to exactly what's checked, regardless of any hiding plugin. If you run SL Category Hider, also update it to 1.0.4 or later — that's where the underlying filter behavior is actually fixed; the POS-side fix on its own isn't enough on a site where a hidden category is involved. As a side effect of this fix, Edit Product also no longer touches a product's categories at all unless you actually changed them in this dialog, and saving them is now a single request instead of two.

Print Label

Opens a focused single-product label dialog:

1. Product Name, SKU, and Price are shown for confirmation.
2. Enter the **Number of Labels** to print (1–100).
3. A "Label will include" preview lists exactly which fields will print — Store name (with logo, if set), Product name, SKU, Price, Barcode, Date — based on your Content Order configuration in Settings → Labels & Printers (Section 22).
4. Click **Preview** to see it rendered before committing, or **Print** to send it straight to your configured label printer.

One product at a time: this dialog prints labels for a single product only — there's currently no bulk "select several products and print all their labels" tool. For printing several different products' labels in one session, open Print Label from each tile in turn.

4. Checkout, Payments & Gift Cards

Step 1: Build the Cart

1. Tap product tiles to add them to the cart (Section 3).
2. Adjust quantity on any cart line with the +/- controls, or tap the quantity number to type an exact amount.
3. To change a line's price, tap it directly — this only works if your account has the Edit Price permission (Section 17); otherwise the price is not editable.
4. Select a customer by searching their name, email, or phone (Section 6), or leave the sale as a guest if Guest Checkout is enabled (Section 24).
5. Apply a discount if you'd like: a one-off manual $ or % discount (if your account is allowed to give one — Apply Discounts, Section 17), a WooCommerce coupon code (anyone can enter one), or — if the selected customer has a Discount Program assigned to their record — it applies automatically with no extra step (Section 19). See the next section for the manual-discount and coupon walkthrough.

Applying a Discount or Coupon (Optional)

1. Click 🏷 **Apply Discount** in the cart panel — this button is always available to everyone, since coupons, rewards points, and gift certificates all live inside the same window.
2. For a one-off manual discount, choose **% Percentage** or **$ Fixed Amount**, enter the value, optionally type a Reason (e.g. "Manager approval", "damaged item"), then click ✓ **Apply Discount**. Whether you can give a manual discount at all, which type(s), and what the largest one you're allowed to give is, all come from your account's Apply Discounts settings (Section 17) — if your account isn't allowed to, the amount field and both type buttons are grayed out and explain why, directly above the field.
3. Or, below the "OR" divider, use the 🏷 **WooCommerce Coupon** box instead: type the code and click **Apply** (or press Enter). This checks the code against WooCommerce's own coupon rules — expiry date, usage limits, per-customer usage limits, allowed emails, minimum/maximum spend, product and category include/exclude restrictions, and sale-item exclusions — against what's actually in the cart right now, and shows the resulting discount before you move on to checkout.
4. A manual discount and a coupon can't both be active on the same sale — applying one replaces the other.

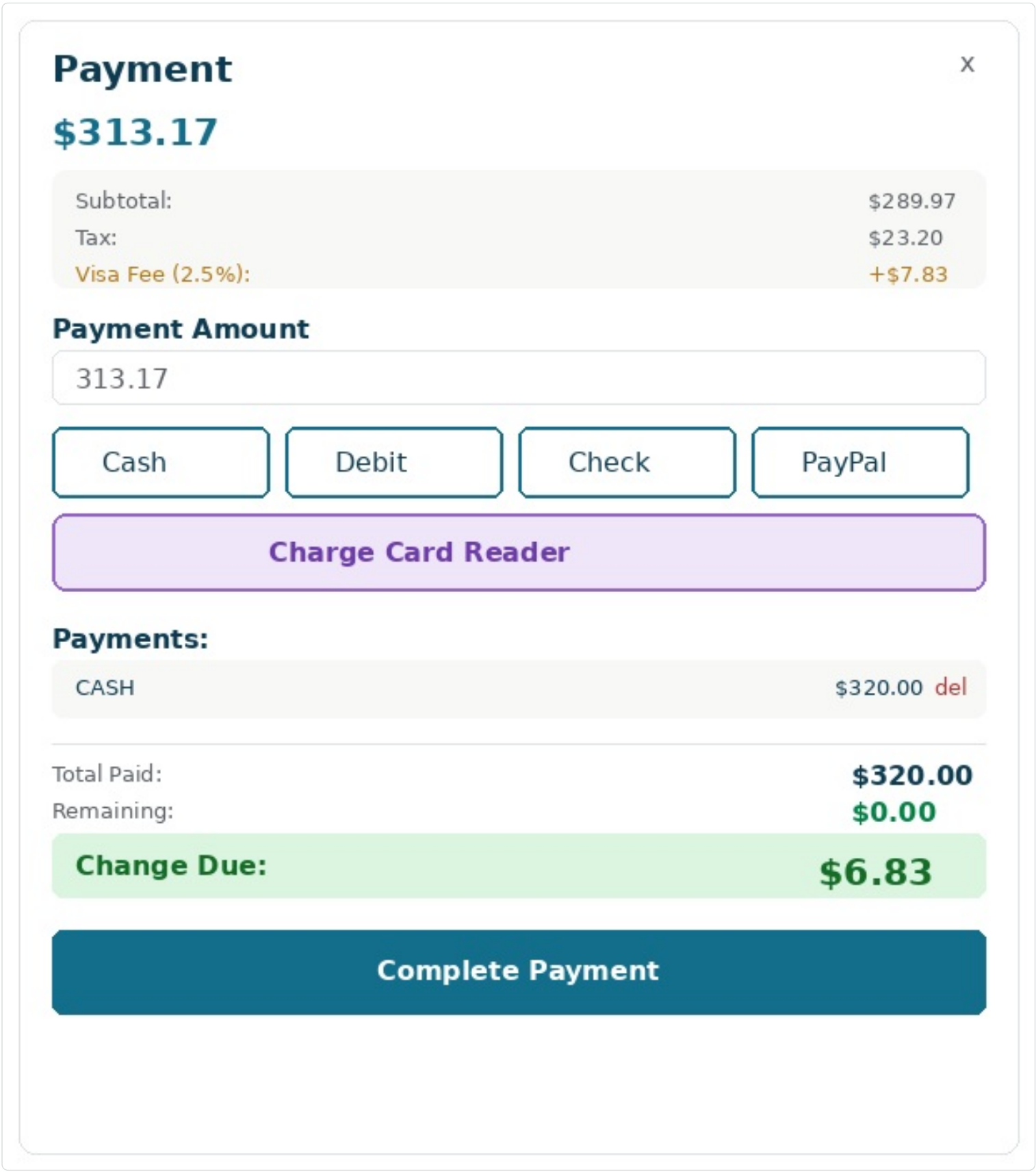
> **The coupon stays live for the rest of the sale.** If the cart contents or the selected customer change after a coupon is applied — an item is added or removed, quantities change, or a different customer is selected — POS automatically re-checks the coupon in the background. If it still qualifies, the discount amount is silently updated to match; if it no longer qualifies (for example, the customer no longer meets a per-customer limit, or the cart no longer meets the coupon's minimum spend), the coupon is removed automatically and a notification explains why.

> **Changed in 4.93.4 — manual discounts are now configured per user, not by role.** Through 4.93.3, whether a manual $ or % discount was allowed at all — and the 10%/$10 cashier cap — was hardcoded to the account's role, and the Apply Discounts checkbox in Settings → Users was ignored for this: staff could never see the Apply Discount button regardless of that checkbox, and cashiers could always discount up to 10%/$10 even with it unticked. From 4.93.4 on, the Apply Discounts checkbox is what actually decides it, with options underneath it for exactly which type(s) are allowed, a separate maximum for each, and whether a discount can take a sale below what the items cost — see Section 17 for the full settings walkthrough. Administrators can always give any discount, with no limit. The Apply Discount *button* itself is now always shown to everyone (previous bullet) — it's the type buttons and amount field inside that window that are restricted.

> **Gift card and trip-payment lines are never discounted by a coupon,** even if the coupon would otherwise apply store-wide — only regular product lines in the cart are eligible.

> **A coupon sale is recorded on the WooCommerce order the same way a web-store coupon purchase would be** — a coupon line plus reduced line-item totals — so it shows up correctly in WooCommerce's own coupon reports and counts toward that coupon's usage limit, exactly as if the customer had entered the code online. If the code doesn't exist, isn't published, coupons are turned off store-wide (WooCommerce → Settings → General), or the code simply doesn't reduce anything in this particular cart (for example, a free-shipping-only coupon, which doesn't apply to an in-store sale), the popup explains exactly why right there — nothing is applied. Coupons themselves are created and managed under **Extensions → 🏷 Coupons** (Section 26), not in this popup.

Step 2: Open the Payment Screen



The Payment screen — amount, method buttons, running list of payments, and change due.

1. Click **Checkout** (or press the Open Payment keyboard shortcut, default F10 — Section 24).
2. The Payment screen shows the order total at the top, with a breakdown just below it — subtotal, tax, and any payment-type fee or discount that applies once you pick a method (Section 24).
3. If the order total is $0 or less (fully covered by a gift card or discount already applied), a green "Fully covered — no payment required" message appears — just click **Complete Payment** to finish, no payment method needed.

Step 3: Take a Single Payment

1. The **Payment Amount** field starts pre-filled with the full remaining total — leave it as-is for a normal full payment, or change it if the customer is paying only part of the total right now (see Split Payment, Step 4).
2. Click a payment method button. Exactly which buttons appear depends on your setup:
   - If Stripe Terminal is configured with a reader attached (Section 21), you'll see **Cash**, **Check**, and — if enabled — **PayPal**/**Venmo**, plus a large

purple **Charge Card Reader** button that sends the amount straight to your connected reader.
    - Otherwise, you'll see **Cash**, **Debit**, and any other card-tender methods your gateway supports, alongside Check and PayPal/Venmo if enabled.
    - If your gateway is GoDaddy Payments (no connected reader), an amber notice reminds you to collect the charge separately on the GoDaddy Commerce App before recording the method here (Section 21).
3. Clicking a method adds it to the **Payments** list below with the amount from Step 1 — for Cash, this is also where change gets calculated (Step 5).
4. Click **Complete Payment** once Remaining reaches $0.00. This button stays grayed out and disabled until the order is fully paid (or already at $0).

> **The button locks itself the instant you click it.** The moment you click **Complete Payment**, it grays out and reads ⏳ **Processing…** until the order finishes being created — any extra clicks or taps that land while it's saving (a slow connection, an impatient double-click) are ignored, so the same sale can never go through twice by accident.

Step 4: Split Payment — More Than One Method on the Same Sale

1. In the Payment Amount field, type only the portion the first method should cover (e.g. $100 of a $313.17 total) rather than the full amount.
2. Click the first payment method — it's added to the Payments list for that partial amount, and Remaining drops to reflect what's left.
3. Change the Payment Amount field again (it automatically defaults to whatever is still Remaining) and click a second method to cover the rest — a common example is part Gift Card, part Card.
4. Repeat as many times as needed. Every method you've applied so far is listed, each with its own amount and a delete icon to remove that one payment if you made a mistake.
5. Once Remaining reaches $0.00, click **Complete Payment**.

Step 5: Cash & Change Due

When you click Cash, the amount from the Payment Amount field is logged as a cash payment. If a customer hands over more than the remaining total, adjust the Payment Amount field to reflect the actual cash tendered (e.g. they gave you a $20 for a $13.17 balance — enter 20). Once that payment is added, a green **Change Due** box appears showing exactly how much cash to hand back.

Step 6: Removing a Payment or Starting Over

Click the delete icon next to any line in the Payments list to remove just that one payment — Remaining recalculates immediately. To back out of the payment screen entirely without completing the sale, click the × in the top corner; nothing is charged and the cart stays exactly as it was.

Payment Methods Reference

Method	Description
Cash	Manual cash entry with automatic change calculation; tracked in the Cash Drawer Log
Card — GoDaddy Payments	No connected terminal; the cashier runs the charge on a separate phone/tablet via the GoDaddy Commerce App and records the result back in the POS
Card — Stripe Terminal	A connected physical reader (WisePOS E, S700, BBPOS Chipper 2X BT, or WisePad 3) charges the card directly from the POS. From version 4.93.0 on, the Stripe charge ID is saved with the sale so a later return or Price Adjustment can refund the card automatically (Section 5)
PayPal / Venmo	Processed through Braintree, PayPal's payment platform for businesses
Split Payment	Combine two or more of the above methods on a single order (Step 4)
Gift Card	Balance checked and applied in full or in part
Store Credit	Applied from the customer's store credit balance
Rewards Points	Redeemed against the order if the SL Rewards extension is active for that customer

> **Payment type discounts and fees:** if configured under Settings → General (Section 24), a specific payment method (e.g. Cash, or a specific card brand like Visa) can automatically add a discount or a fee at checkout — you'll see it listed in the breakdown at the top of the Payment screen the moment you select that method.

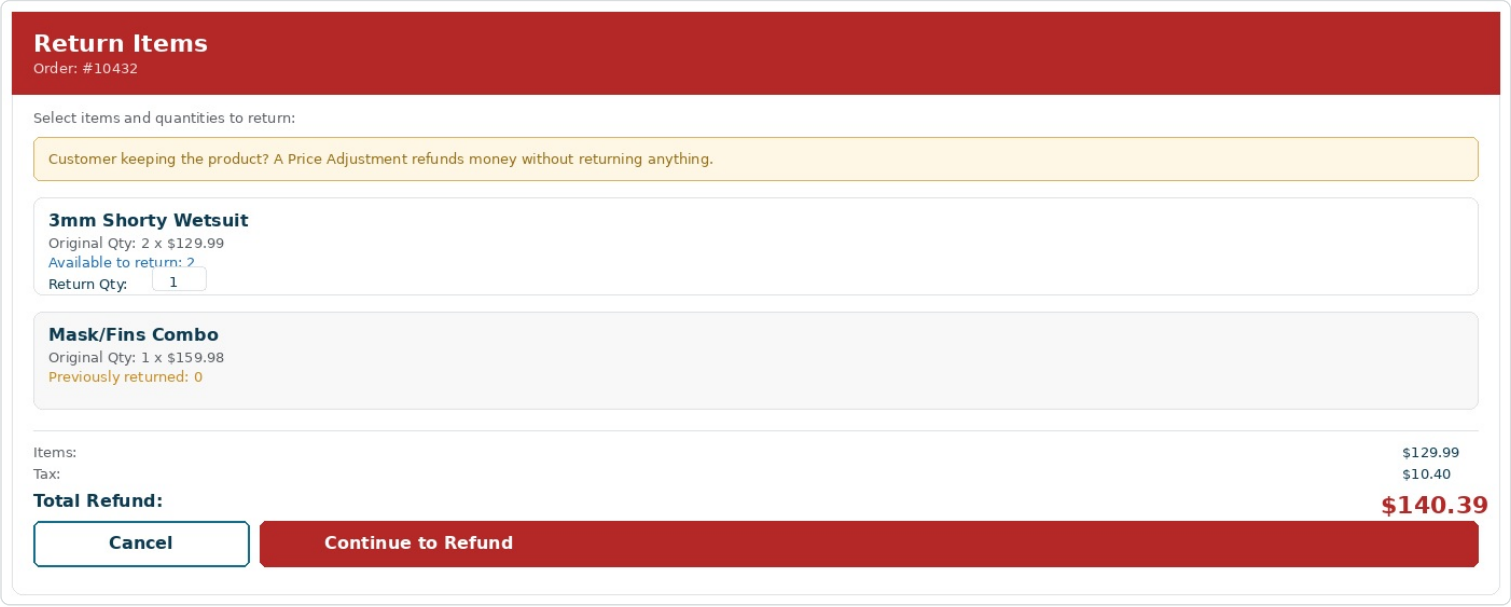
Selling Gift Cards

1. Navigate to the Gift Cards category/subcategory on the main screen (or use the Gift Card Subcategory Trigger configured in Settings → General, which opens the gift card popup directly from a chosen subcategory tab — Section 24).
2. Enter the amount, and choose a delivery method: **Digital** (requires a recipient email, sent automatically) or **Physical** (check "Physical Gift Card" to be mailed).
3. Optionally add recipient name, sender name, and a message.

4. Click **Create & Add to Cart** and check out normally, using any payment method from Steps 2–4 above.

> **Requires SL Gift Cards & Store Credits:** gift card sales and store credit both depend on the SL Gift Cards & Store Credits plugin being installed and active. See Section 26 for how the Extensions system depends on your other SL plugins.

5. Returns & Refunds



The Return Items screen — per-item quantity selection and a live refund total.

Step 1: Start a Return

1. Go to the **Orders** screen (Section 7) and open the order.
2. Click **Return/Refund** (red button).
3. The **Return Items** screen opens, listing every item on the order.

> **Returning the product, or just refunding money?** If the customer is keeping the item — a goodwill gesture, a minor defect, a long backorder wait — don't use Return/Refund at all. Click the **Price Adjustment** link shown right on this screen instead (only visible if Price Adjustments is enabled and your account has that permission — see Price Adjustment below and Section 24). A return marks stock and inventory as coming back; a Price Adjustment only refunds money and leaves everything else alone.

Step 2: Choose What's Coming Back

1. For each item, review its **Original Qty** and price.
2. If some of this item was already returned on a previous, separate return, that's shown as **Previously returned: N**, and **Available to return** reflects only what's left.
3. Enter the **Return Qty** for each item you're taking back — this doesn't have to be the full order. Return part of an order now and the rest later if that's how the customer wants to handle it; the app keeps track across multiple separate returns on the same order.
4. Items already fully returned show as grayed out with no quantity available.
5. Watch the running totals at the bottom — Items, Tax, Shipping, and **Total Refund** — update live as you adjust quantities.
6. Click **Continue to Refund**.

> **Fixed in 4.93.1 — returned quantities were being double-counted.** Before this version, a return of 1 of an item could show as **Previously returned: 2** (with the reprinted return receipt's subtotal, tax and total doubled to match), and a partial return could block more of the remaining quantity than it should have. The refund amount itself — including any automatic Stripe or Braintree refund (see Automatic Refunds, below) — was always correct; only the tally shown here and on reprinted receipts was wrong. This is fixed going forward, and orders affected before the update now read correctly too, with no data changes needed on your end.

Step 3: Complete the Refund

1. The Payment screen opens in return mode — the header shows **Refund Method:** instead of Payments, and the total is negative.
2. Choose how the customer gets their money back: the order's **original payment method** (refunding them the same way they paid), or **Store Credit** (adding it to their account balance instead).
3. Click **Complete Refund** to finalize the return (this button reads Complete Refund rather than Complete Payment whenever you're in return mode, so it's never ambiguous which one you're about to do).

> **The math is handled for you:** if a discount or a payment-type fee/discount (Section 24) applied to the original sale, it's automatically prorated into the refund — a return never pays back more than the customer actually paid. If part of an item's price was already refunded through a Price Adjustment, that amount is subtracted too, so the customer is never double-refunded for the same money.

> **A return that comes to exactly $0.00 is still a real return.** If an item was sold 100% off, or the whole order was paid entirely by gift card or

store credit, the refund amount comes out to $0.00 — that's expected, and it's still processed as a genuine return: the refund is recorded in WooCommerce and the item's quantity goes back into stock, exactly like any other return, so your reports and inventory stay accurate. Returning an item that was sold 100% off also now correctly shows and records a $0.00 refund for that item, instead of mistakenly refunding its regular price.

Gift card refunds: when an order containing a gift card is refunded, that gift card is automatically deactivated to prevent fraud and double-spending.

A completed return is recorded as its own order, prefixed **RTN-** followed by the original order number, so it's easy to find and cross-reference in the Orders screen (Section 7) or in Reports (Section 14).

Price Adjustment — Refunding Money Without a Return

Use this instead of a return when the customer is keeping the item — a goodwill gesture, a minor defect, a long backorder wait — and only the money needs to move, not the stock.

1. From the same Return Items screen (Step 1 above), click **Price Adjustment** instead of entering a return quantity. The link only appears if Price Adjustments is enabled store-wide and your account has the Price Adjustments permission (Section 24, Section 17).
2. In the 💰 **Price Adjustment** popup, pick the **Item** this adjustment applies to from the dropdown.
3. Choose **Percentage %** or **Fixed Amount $**, then enter the value — a live preview shows exactly how much will be refunded (e.g. "Will refund $25.00 back to the customer").
4. Choose **Refund to**: **Original Payment Method** (card/PayPal/Venmo — attempts the automatic refund described below), **Cash** (hand it back in person yourself), or **Store Credit**. Choosing Cash or Store Credit shows a reminder that you still need to actually hand back the cash or add the credit yourself — only Original Payment Method is sent automatically.
5. Enter a **Note** explaining why — this is required, and is saved with the order (e.g. "Item was on backorder 6+ weeks, offered 15% goodwill discount").
6. Click **Refund Customer** to finish. The item stays sold, nothing is marked returned, and stock is not touched.

A Price Adjustment doesn't reduce the item's quantity sold or touch inventory — it only records a partial refund of money against the order. If the customer is also returning the physical item, use Return/Refund (Steps 1–3 above) instead, or in addition if only some of the money should go back this way.

Automatic Refunds to the Original Card, PayPal, or Venmo

When you choose the order's **original payment method** in Step 3 above — or on a Price Adjustment, below — POS attempts to actually send the money back itself, rather than just recording the refund in WooCommerce:

- **Card charged on a connected Stripe reader** — refunded straight back to that card through Stripe, automatically, the moment the return or price adjustment is completed. No trip to the Stripe dashboard needed.
- **PayPal or Venmo (via Braintree)** — refunded straight back through Braintree the same way.
- **Cash, GoDaddy Payments (no connected reader), gift card, store credit, or rewards points** — these were never sent automatically; the refund is recorded in WooCommerce and you hand back cash or otherwise settle it yourself, exactly as before.

1. If the automatic refund succeeds, the confirmation message tells you so (for example, "*…— $25.00 sent back to the card through Stripe*"), and an order note is added recording the processor's refund ID and status.
2. If it fails — the charge was already refunded, it's too old, Stripe/Braintree is unreachable, etc. — the return or price adjustment still completes and is recorded in WooCommerce exactly as normal; POS tells you the dollar amount to refund manually in the processor's own dashboard, and an order note records that it couldn't be sent automatically along with the reason.

Stripe reader sales need POS 4.93.0 or later to qualify. The automatic Stripe refund works by matching the return back to the original card charge, and that match is only possible for sales made on POS 4.93.0+ (the version that started saving the charge with the sale). Returning an older reader sale shows the message "*No Stripe payment is recorded on this order (sales made before POS 4.93.0 did not save it) — refund it in your Stripe dashboard,*" and the return/adjustment still completes in WooCommerce as usual; you just finish the refund yourself in Stripe.

Only the part NOT going to store credit goes back to the card. If you split a refund between Store Credit and the original method — or if part of the sale was already covered by store credit/gift card originally — only the portion refunded to the card or PayPal/Venmo is sent there; the rest is handled as store credit the normal way. On a sale that was split across more than one card/PayPal/Venmo tender, only the amount you're refunding to that specific method goes back to it, and never more than that one payment was originally charged. (Previously, a PayPal/Venmo sale refunded partly as store credit could incorrectly also refund the *full* amount back to PayPal/Venmo — fixed in 4.93.0.)

Safe to retry. If a return or price adjustment's automatic card refund fails and you try again, it won't charge the card refund twice — each attempt is tagged so a repeat can't double-refund the same money.

6. Customers

Step 1: Find an Existing Customer

Use the main search bar (Section 2) and type a name, email, or phone number — matching customers appear alongside product results. Alternatively, click **Customers** to browse the full list and recent transactions directly.

Step 2: Add a New Customer

1. Click **Customers → Add Customer**.
2. Fill in **Name** and **Email** — these two are required; everything else is optional.
3. Add Phone, Billing Address, and Shipping Address if you have them on hand — none of this blocks saving if left blank.
4. If Titles & Certs are configured (Section 20), you can set this customer's title and certification list right here on the same form.
5. Click Save. The customer is created immediately and can be selected onto the current cart right away.

Step 3: Assign a Discount Program (Optional)

If you've set up Discount Programs (Section 19) — e.g. an Employee or Military discount — this is where you attach one to a specific customer so it applies automatically every time they check out:

1. Open the customer's record and click **Edit**.
2. Scroll to the **Discount Program** field (a blue-highlighted box). It's a dropdown listing every program you've configured, each shown with its actual discount value right in the option text (e.g. "Employee Discount (20% off)") so you can tell them apart at a glance.
3. Select the program that applies to this customer, or leave it on **— No discount program —** to remove one that was previously assigned.
4. Save the customer record.

From now on, whenever this customer is selected on a sale — whether at the POS or checking out on your website while logged in — their assigned program's discount is applied automatically, honoring any category or product exclusions configured on that program (Section 19).

The Customer Detail Panel — What Each Section Shows

Opening a customer's record shows:

- **Purchase History** — previous orders, total spent, order frequency
- **Rewards Balance** — loyalty points and tier, if SL Rewards is active and the Rewards extension permission is granted
- **Store Credit** — the customer's store credit balance, if SL Gift Cards & Store Credits is active
- **Travel Bookings** — any trip bookings on file, if SL Travel Booking Manager is active and the Travel extension permission is granted
- **Signed Waivers & Leases** — documents on file, matched by email (falling back to name), if SL Waivers & Leases is active and the Waivers → Customer Lookup permission is granted
- **Titles & Certifications** — the customer's assigned title and certification list (Section 20)

> **Behind the scenes:** each of the plugin-dependent sections above is fetched live from that plugin's own data. If the corresponding plugin isn't active, the POS is designed to fail quietly there — for example, a customer with no waiver on file looks the same as a customer whose site has no Waivers plugin installed at all — rather than showing an alarming error at the counter for something the cashier can't fix mid-sale. If you expect to see this data and don't, first confirm the corresponding SL plugin is installed and active (Section 26), before assuming the customer genuinely has nothing on file.

Guest Checkout

If Guest Checkout is enabled (Settings → General, Section 24), customers can complete a purchase without an account — tracked under a configurable guest identity (name, email, and address defaults you set once). Encourage account creation where practical so customers can earn rewards and build purchase history.

7. Orders

Step 1: Find an Order

1. Click **Orders** in the header.
2. Type into the search box to find an order by **customer name, order number, or WooCommerce order #**.
3. Use the **Filter by Status** buttons to narrow the list to just Pending, Processing, On-Hold, Completed, Cancelled, or Refunded orders, or leave it on All.
4. Toggle **Quotes Only** if you specifically want to see orders that originated as a saved quote (Section 25) rather than a direct sale.
5. Toggle the source filter to show POS orders, WooCommerce (website) orders, or both together.
6. Click any order in the list to open its full detail — line items, customer info, payment method, totals, notes, and refund history.

Status	Description	Next Steps
Pending	Payment not completed	Complete payment or cancel
Processing	Received and being prepared	Mark completed or on-hold
On-Hold	Awaiting stock or approval	Process or cancel when ready
Completed	Order fulfilled	Final status for POS sales
Cancelled	Order cancelled	No further action
Refunded	Payment returned	No further action

Step 2: Change Many Orders' Status at Once

> **What this button actually opens:** Bulk Change Order Status doesn't open a custom POS screen — it opens the real, standard WooCommerce Orders admin list in a window inside POS (with the WordPress menus and admin bar hidden so it feels native). Everything you already know about managing WooCommerce orders works here exactly the same way.

> **If you use SL Media Folders:** that plugin's folder-tree sidebar is hidden inside this window, the same as it is inside the Waivers & Leases embedded views (Section 26) — it positions itself against WordPress's normal admin menu, which this window hides, so showing it here would only float uselessly over the orders list. Fixed in 4.93.3: previously it could appear and sit on top of the list, including after filtering or applying a bulk action; it's correctly hidden in all of those cases now.

1. Click **Bulk Change Order Status** (only visible with the Bulk Change Order Status permission — Section 17).
2. In the window that opens, use the checkboxes on the left of each order row to select as many orders as you want to update.
3. Open the **Bulk actions** dropdown near the top of that list and choose the new status.
4. Click **Apply**.
5. Click the maximize icon in the top corner of this window to expand it full-screen if you're working through a long list, or the × to close it and return to the main Orders view.

Step 3: Print, Reprint, or Email a Receipt

From an order's detail view, receipts can auto-print after checkout, be manually reprinted at any time, previewed before printing, or emailed as a PDF to the customer — all governed by the Receipt Options in Settings → Labels & Printers (Section 22).

Step 4: Export Every Back-Ordered Product

1. Click **Export Back Orders**.
2. A CSV downloads listing every out-of-stock product currently sitting in a Processing order, with quantities combined across every order that needs it.
3. Each row is automatically cross-referenced against the Reordering Report (Section 8), so the spreadsheet itself tells you whether that product has already been ordered from the vendor — and if so, the quantity, date, and invoice/PO number — or still needs to be ordered at all.

Column	Description
Qty on Back Order	Combined quantity needed across all Processing orders
Product Name, SKU, Brand/Vendor	Identifies the product
Ordered	"Ordered" or "Not Ordered", based on the Reordering Report
Qty Ordered, Date Ordered, Invoice / PO #	Filled in only when the product has already been marked Ordered in the Reordering Report

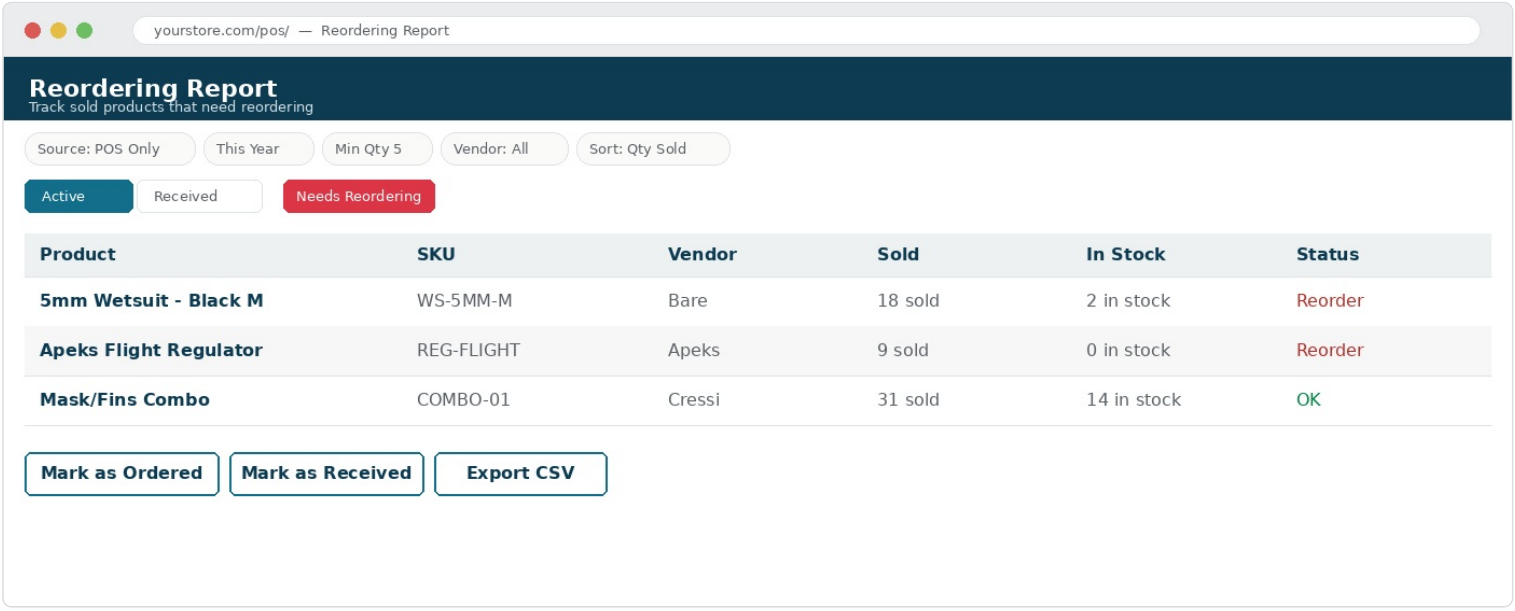
Step 5: View Orders and Reordering Side by Side

Click **Compare with Reordering** to open the Orders screen and the Reordering Report (Section 8) together, split-screen with a draggable divider between them — useful for cross-checking what's on backorder against what's already been reordered from vendors, without switching back and forth between two separate full-screen windows.

Step 6: Print a Pull Slip

A **Pull Slip** button is available both on an order's card in the list (hover to reveal it) and inside View Details — printing a simple, warehouse-facing sheet of exactly what to physically pull for that order: Qty, Product Name, SKU, and Shelf Location (Main Section + Sub-Location combined, from the Vendor Price & Image Updater plugin's location fields, if you use them) for every line item. Location data loads live from each product; if the order's detail view is already open, nothing already loaded there gets fetched a second time.

8. Reordering Report



The Reordering Report — filters, status view, and per-item or per-vendor bulk actions.

Click Reordering in the header to open this screen — it tracks which products have been selling and flags the ones that need to be reordered from your vendors, independent of WooCommerce's own low-stock notices.

> **Reopening this report is fast — but only within the same running POS session: closing and reopening the Reordering Report screen while the POS app itself stays open in your browser is quick, since it remembers the orders already fetched and only asks the server for anything new since then. Fully reloading or reopening the POS app itself (a browser refresh, or a fresh login) clears that memory entirely — the first Reordering Report load after that still has to fetch everything from scratch, the same as before, and can take a while again. Click Sync at any point if you want to force a completely fresh pull of every order regardless.**

Step 1: Filter to What You Care About

1. Choose a **Source**: POS Only, WooCommerce Only, or All Orders.
2. Set a **Start Date** and **End Date** for the sales window you want analyzed (defaults to the last year).
3. Set a **Min Qty** if you only want to see products that sold at least a certain number of units in that window.
4. Use the **Vendor/Brand** multi-select to narrow to specific brands.
5. Type into **Product Search** to find a specific product by name or SKU.
6. Choose how the list is sorted: Qty Sold (high→low), Product Name (A–Z), Last Sold (newest first), or In Stock (low→high).
7. Click **Clear Filters** at any time to reset everything back to the one-year default with no other filters applied.

Step 2: Switch Between Active and Received

1. Click **Active** to see products still being tracked for reorder.
2. Click **Received** to see items already marked as received from a vendor.
3. While on Active, use the **Show** buttons to narrow further: All, Needs Reordering, or Reordered.

Step 3: Mark Items Ordered or Received

1. Find the item (or items) in the list.
2. Mark an individual item, or use the vendor-level bulk action to mark every item currently shown for that vendor at once, as **Ordered** (recording a

date, invoice/PO number, and the quantity you're actually ordering) or **Received** (which moves it to the Received view).
3. Vendor-level bulk actions ask you to confirm first, since they apply to every product currently visible for that vendor under your active filters — double check your filters before confirming a bulk action.

> **Sold after ordered date — may need to order more:** once an item is marked Ordered, its row turns red with this exact warning if a sale comes in on a calendar day *after* the date you recorded for that order — a sale later the same day the order was placed doesn't trigger it. It's telling you demand kept moving after you placed the order — worth a quick check on whether the quantity you ordered is still going to be enough before it arrives.

Backorders & Partial Shipments

Click the ⏳ **Backorder** button on an item to record that some (or all) of a vendor order is still outstanding:

1. Enter the quantity still on backorder from the vendor. The button relabels itself ⏳ **Backorder: {qty}** once set.
2. Click it again at any time to update that quantity, or clear it back to 0/blank to remove the backordered status entirely.

If the item also has an **Ordered Qty** on file, setting a backorder quantity that's less than it means part of the order has evidently already arrived — the POS works out how many (Ordered Qty minus Backorder Qty) and offers to add that part to your real stock right away:

- **OK** — increases on-hand stock by the arrived quantity immediately, and the row shows "*{received} of {ordered} received*" next to the Backordered label from then on.
- **Cancel** — only records the backorder; stock is left alone.

When the backordered portion later arrives, click **Received** as usual:

- If part was already added to stock this way, **Received** adds only what's still outstanding (Ordered Qty minus what was already received) — never double-counts the part that came in earlier.
- If a backorder quantity is set but nothing has been added to stock yet, clicking **Received** prompts you for exactly how many units you're receiving right now — everything ordered, just the backordered amount, both together, or any other number you type — since the POS can't know on its own which portion actually showed up.

> **Finishing the order clears the backorder marker.** Once an item's full received history accounts for everything ordered, its backorder and partial-received flags are cleared automatically — the next vendor order for that item starts clean.

Vendor Header: Bulk Invoice/PO #, Qty Ordered & Ordered Date

At the top of each vendor's group in the report, three small boxes let you fill in order details for every item you've already checked **Ordered** for that vendor at once, instead of opening each one:

Box	What it does
Invoice/PO #	Type a number and click **Apply** (or press Enter, or click out of the box) to fill it onto every checked-Ordered item for that vendor that doesn't already have one. Items that already have an invoice/PO # are left alone.
Qty Ordered	Same rule — fills only the checked-Ordered items for that vendor still missing a Qty Ordered. Must be a whole number.
Ordered Date	Checking an item Ordered already stamps it with today's date, so this box isn't for filling a blank — it's for **back-dating**: it replaces the date, but only on items that are checked Ordered and still missing their Invoice/PO # or Qty. Can't be set to a future date.

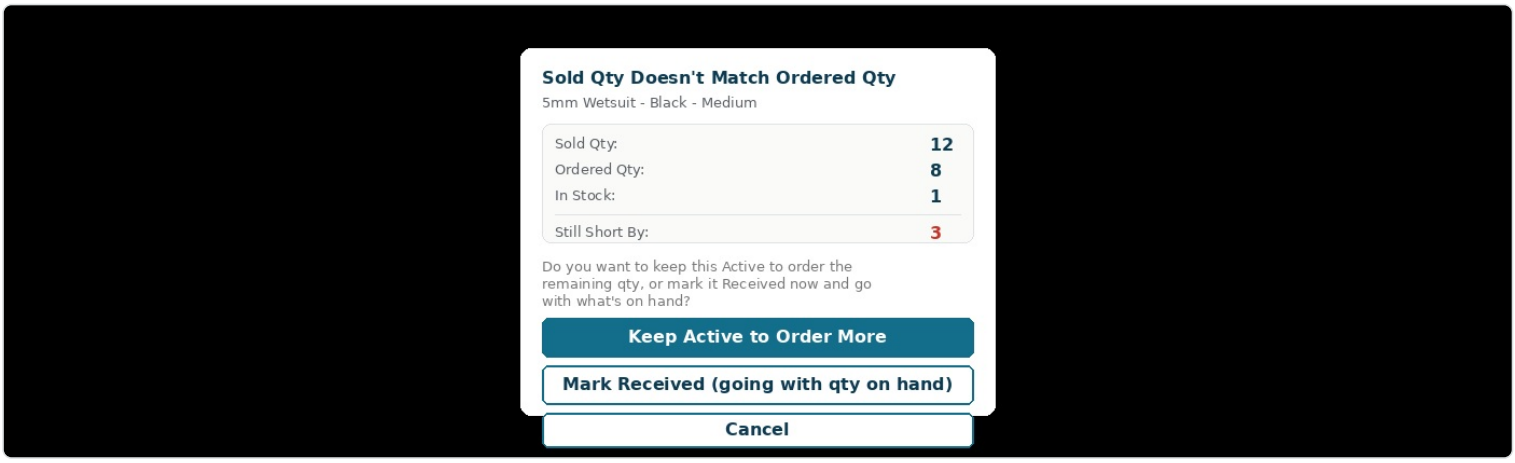
Each box shows a live count next to it (e.g. "*4 empty*" or "*2 missing PO/Qty*") of how many of that vendor's items currently qualify. If you type into the Ordered Date box and then apply an Invoice/PO # or Qty fill before applying the date separately, that pending date rides along and gets applied to those same items in the same action.

> **Only checked-Ordered items are touched.** These three boxes never check an item as Ordered on their own, and never overwrite a value that's already filled in — they only fill blanks (or, for Ordered Date, back-date items still missing their PO # or Qty).

Two per-vendor buttons sit alongside these boxes:

- 🧾 **Create PO #'s** — generates a PO number (in the form `VEN-YYYYMMDD-HHMM`, using the first three letters of the vendor name) and assigns it to every item checked Ordered for that vendor that doesn't already have an invoice/PO # — for vendors that require you to supply your own PO number rather than using theirs. Offers to export a CSV of the affected products with the new PO number right after.
- 📤 **Export Not Ordered ({n})** — downloads a CSV of every item currently shown for that vendor that is *not* yet checked Ordered, with product, SKU, category, qty sold, in-stock, price, cost, last sold, and backorder qty — the list to build an order from or send to the vendor.

The Reconciliation Prompt When Marking Received



"Sold Qty Doesn't Match Ordered Qty" — only appears when what's sold would outstrip your order plus what's already on hand.

Clicking **Received** on an item doesn't always just mark it received right away. If the quantity sold since you started tracking this item is *more than* your Ordered Qty plus what's currently In Stock, a prompt appears first — because in that specific case, the order you placed may not actually be enough to cover it.

Row	Meaning
Sold Qty	Total sold for this item in the tracked window
Ordered Qty	What you recorded when marking it Ordered
In Stock	Current on-hand quantity right now
Still Short By	Sold Qty minus (Ordered Qty + In Stock) — how many more you'd need to fully cover what's sold

Two real choices, plus Cancel:

- **Keep Active to Order More** — un-marks it as Ordered entirely (clearing the recorded date, invoice, and quantity) and puts it back in the Active list, so you can place a corrected, larger order from scratch.
- **Mark Received (going with qty on hand)** — accepts the shortfall and finishes marking it Received anyway, if you've decided what's on the way is enough for now.

This prompt only appears when there's an actual shortfall. If what you ordered plus what's in stock already covers everything that's sold, clicking Received just marks it received immediately with no interruption.

Sold Qty here follows your currently selected Start Date/End Date filter (Step 1) — it isn't necessarily all-time sales. If your filter is set to a shorter window, Sold Qty (and therefore Still Short By) only reflects sales inside that window. Widen the date range before receiving an item if you want this reconciliation to account for its full sales history rather than just what's shown right now.

The received quantity logged is always exactly what you typed: whatever number you enter as the quantity when marking an item Received is what gets recorded in its history — not a figure re-calculated from sales activity. The running "Qty" shown on an already-received item reflects this same logged total.

Marking an individual item Received now actually adds that quantity to your real stock on hand — this didn't used to be true. Clicking **Received** on a single item adds its Ordered Qty directly into the product's live WooCommerce stock, and shows a confirmation with the new total. Clicking **Undo** on the Received view reverses that same amount back out. This uses WooCommerce's own safe stock-adjustment function, so a sale happening at the exact same moment can't get silently overwritten.

The vendor-level "Mark all as Received" bulk button does not yet adjust stock — only the per-item Received button does. Using the bulk action for a whole vendor still just logs those items as received without touching real inventory, so bulk-receiving a vendor's shipment still means updating stock separately (or in WooCommerce directly) for now. Use the per-item button instead of the bulk one on any item where you specifically need stock to update automatically.

Step 4: Add a Product That Hasn't Sold Enough to Show Up

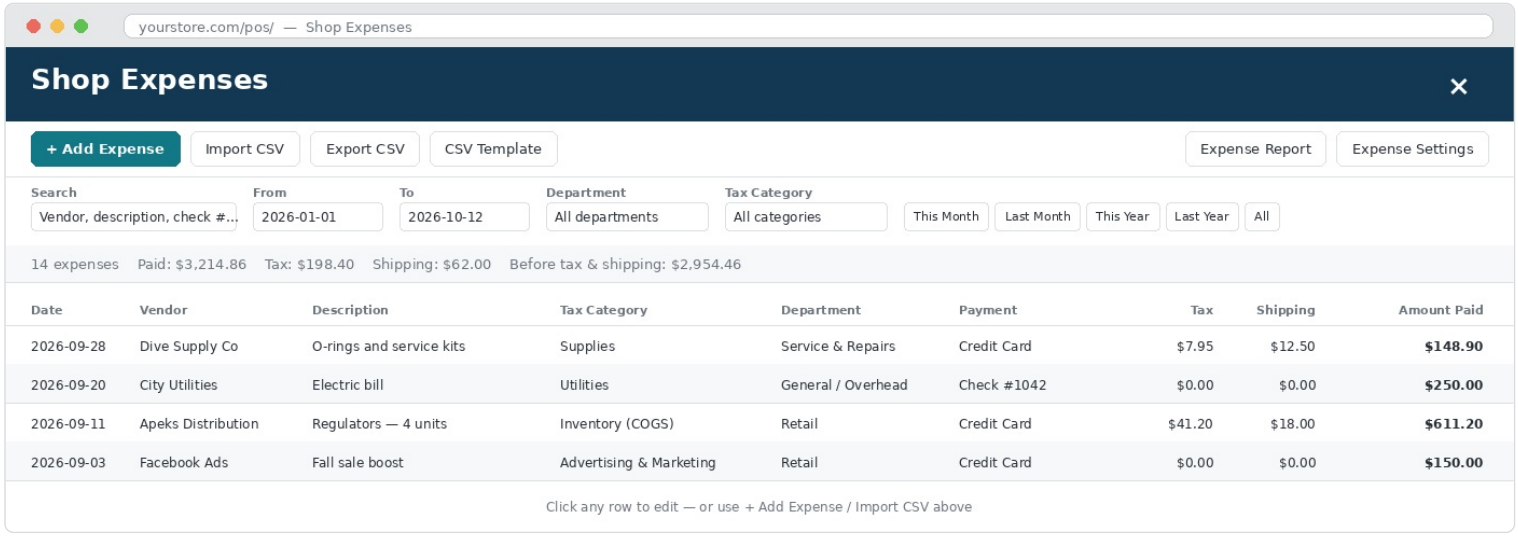
Click **Add Product** to add something to the report directly — useful for an item you already know needs reordering that hasn't sold enough (or at all) to surface on its own through the sales-based filters above.

Step 5: Export

- **Export CSV** — every product currently shown under your active filters
- **Export Needs Reordering** — just the products currently flagged Needs Reordering

Tip: click **Compare with Orders** to view the Reordering Report and Orders screen side by side (Section 7) — handy for confirming a backordered product on an open order is already on its way from the vendor.

9. Expenses



The Shop Expenses screen — add, search, filter, import and export every shop expense from one place.

Click 🧾 **Expenses** in the header to track the bills and receipts your shop pays — rent, utilities, vendor invoices, ad spend, anything that isn't a product sale. This is separate from your WooCommerce order/sales data entirely; it's a simple ledger built for handing your tax categories and department totals to a bookkeeper or accountant. It needs the **Manage Expenses** permission (Administrators always have it — Section 17) to open.

> **Ported from SL Property Manager, with two differences:** an expense here also has a **Shipping Cost** field alongside Tax Paid, and instead of being assigned to a property/ownership company, it's assigned to a **store Department** (Retail, Service & Repairs, Rentals, etc.) — so the Expenses report can show what each part of the shop costs to run.

Step 1: Add an Expense

1. Click **+ Add Expense**.
2. Fill in **Date** and **Amount Paid** (both required) — Amount Paid is the full total that left the account, including tax and shipping, not just the line-item subtotal.
3. Fill in **Tax Paid** and **Shipping Cost** if any part of the total was tax or shipping — the form shows what's left over ("Before tax & shipping") once you've entered them.
4. Choose or type a **Store/Vendor** and a **Tax Category** from their dropdowns — pick **+ Add new…** at the bottom of either list to add one on the spot (Vendors are also added automatically the first time you type a new one here or bring one in on a CSV import).
5. Choose a **Payment Type**. Any payment type with the word "Check" in its name reveals a **Check #** field underneath.
6. Add a short free-text **Description** of what the expense was for.
7. Under **Receipt / Invoice Pages**, choose one or more image/PDF files to attach — pick several at once for a multi-page receipt, or come back later and add more pages to the same expense any time. If SL Media Folders or FileBird is active, a **Save to Media Folder** dropdown lets you file the upload into a specific folder.
8. Under **Assign To**, choose the **Store Department** this expense belongs to (required) — the department you pick is remembered as the default the next time you add an expense, to speed up entering a batch from the same area.
9. Click **Save Expense**.

> **"Tax + Shipping is more than the Amount Paid":** if what you entered for Tax Paid plus Shipping Cost adds up to more than Amount Paid, a confirmation asks you to double check before saving — Amount Paid should be the full total, tax and shipping included, so this usually means one of the fields was entered wrong.

To edit or delete an existing expense, click anywhere on its row in the list — the same form opens pre-filled, with a **Delete Expense** button at bottom left (deleting can't be undone).

Step 2: Search, Filter & Review Totals

1. Use **Search** to match against vendor, description, tax category, department, payment type, or check number.
2. Set **From**/**To** dates, or click a quick preset — **This Month**, **Last Month**, **This Year**, **Last Year**, or **All**.
3. Narrow further with the **Department** or **Tax Category** dropdowns.

The bar just under the filters totals everything currently shown: number of expenses, Paid, Tax, Shipping, and Before tax & shipping — so you can sanity-check a filtered view (e.g. "this month, Retail only") without leaving the screen.

Step 3: Import from CSV

1. Click **CSV Template** to download a starter file with the expected columns (Date, Amount Paid, Tax Paid, Shipping Cost, Vendor, Description, Tax Category, Payment Type, Check #, Department, Receipt URL) and two example rows.

2. Click 📥 **Import CSV** and choose your file.

Columns are matched by their header name (not by position), so they can be in any order, and common variants are recognized automatically — "Amount", "Total", and "Total Paid" all match the Amount Paid column, for example. If fewer than two columns are recognized by name, the importer falls back to reading columns in the template's own left-to-right order instead.

> **Re-importing the same file is safe.** A row that matches one already on file (same date, amount, tax, shipping, vendor, description, and check #) is skipped automatically, so importing the same export or the same file twice by mistake doesn't create duplicates. Several identical rows inside one file are still all kept, though, since that's a legitimate case (e.g. two identical small cash purchases the same day).

After importing, a message reports how many rows were created and how many were skipped as duplicates, plus up to 25 warnings for rows it couldn't fully read (an unreadable date is skipped entirely; an unreadable dollar amount is saved as $0 so you can fix it by hand afterward). Any vendor, tax category, payment type, or department name in the file that isn't already on its picklist is added automatically, the same as typing a new one on the Add Expense form.

Step 4: Export

- 📤 **Export CSV** — every expense currently shown under your active filters, in the same column layout as the import template (so an export can be re-imported elsewhere, or handed to a bookkeeper).

Picklists: Vendors, Tax Categories, Payment Types & Departments

Vendor, Tax Category, Payment Type, and Department are all growing lists — manage them in **Settings → 🧾 Expenses** (Section 18):

- **Rename** — renames the value everywhere it's used, on every expense that already has it (including past years), not just going forward.
- **Hide** / **Show again** — takes a value off the Add Expense form's dropdown without touching any expense that already uses it; a hidden value still appears normally in the Expenses report for the dates it was actually used. Use this instead of deleting when your tax categories change for a new tax year — add the new ones and hide the old ones, rather than renaming over them.
- **Remove** — only available when nothing currently uses that value (0 expenses); permanently deletes it from the list.

> **When the tax form changes:** add the new categories and hide the old ones, rather than renaming an old category into a new one — renaming relabels every past expense that used the old name, which can make last year's totals no longer match what you actually filed.

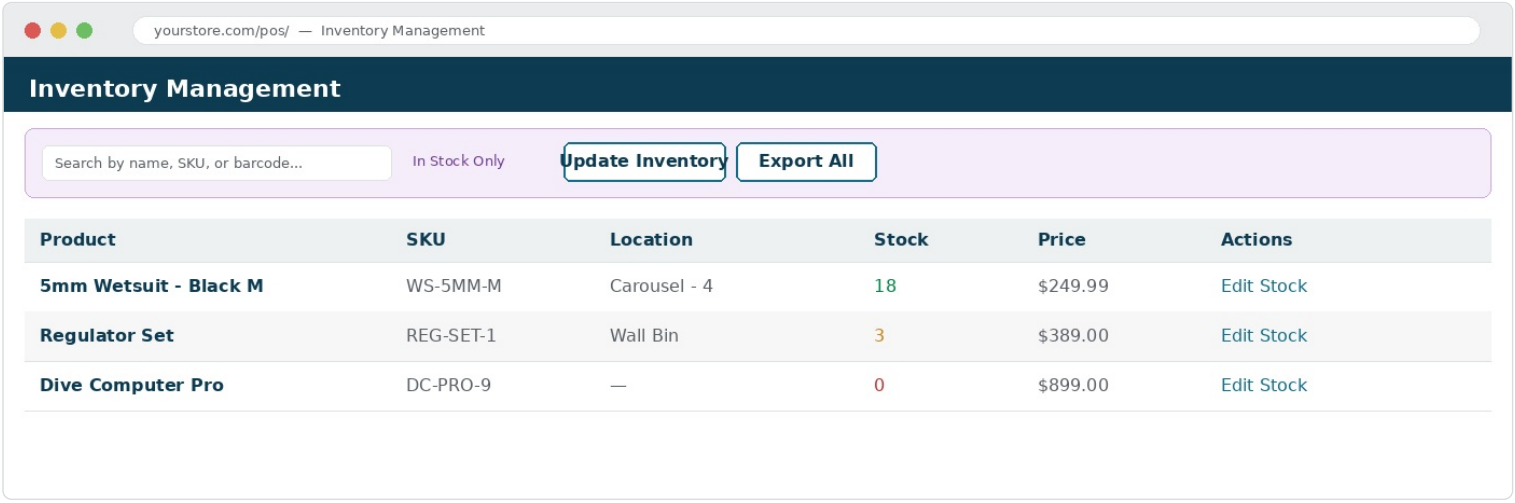
Expense Reports

Click 📊 **Expense Report** (from the Shop Expenses screen) or 🧾 **Expenses** in the Reports sidebar (Section 14) — it's the same report either way, and only appears for users with the Manage Expenses permission.

1. Set a **From**/**To** date range (Source and Payment Method, further up the Reports screen, are for sales reports and are ignored here).
2. Choose **Group by** — Tax Category, Department, Vendor, Month, or Payment Type — and optionally a second-level **Then by** to sub-group within each group.
3. Use the **Department** dropdown on the report itself to filter to one department (or Unassigned) after running it.
4. Check **Show line items** to list every individual expense under its group/subgroup instead of just the totals.

Each group and the grand total show: # Expenses, Before Tax & Shipping, Tax Paid, Shipping, Amount Paid, and % of Total. Export either 📤 **Export Summary CSV** (the grouped totals) or 📤 **Export Detail CSV** (every expense as its own row), or click 🖨 **Print** for a clean printable version in a new tab.

10. Inventory



Inventory Management — color-coded stock levels and per-row actions.

Click Inventory in the header to open this screen. Streamline POS reads and writes stock directly to WooCommerce — stock levels update in real time, with color-coded warnings built right into the list: green stock is 10 or more, orange is under 10, red means zero, and gray dashes mean this product doesn't have stock tracking enabled at all.

Step 1: Find What You're Looking For

1. Type into **Search Products** to filter by name, SKU, or barcode (starts filtering automatically as you type).
2. Check **In Stock Only** to hide every product currently at zero stock.
3. Set **Sort By** — Name, SKU, Location, Stock Level, or Price — and Ascending/Descending.
4. Use the page number field and the First/Prev/Next/Last controls at the top-right to move through your catalog if it spans more than one page.

Step 2: Adjust One Product's Stock

1. Find the product's row.
2. Click **Edit Stock** in the Actions column — the stock number itself turns into an editable field right in the table.
3. Type the new stock quantity.
4. Click **Save** to apply it immediately, or **Cancel** to back out without changing anything.

Two more actions live on every row: the small label icon on the product thumbnail opens the single-product **Print Label** dialog (Section 3), and — if your account has the Edit Product Details permission (Section 17) — an **Edit Product** button opens the same full product editor described in Section 3 (price, cost, brand, location, barcode, dimensions, categories, and more).

Step 3: Update Many Products at Once via CSV

1. Click **Update Inventory**.
2. **Step 1 — Select columns to update**: check any combination of Barcode, Vendor, Tax Status, Location, Stock, Price, Cost, Weight, Length, Width, and Height. Only the columns you check here will actually be changed by the import — everything else on the product is left alone even if your CSV happens to contain other data.
3. **Step 2 — Download template CSV**: this template comes pre-filled with the SKU and Name of every product currently on your screen (i.e. the current search/filter/page), plus a column for each field you checked in Step 1. Edit the values you want to change; leave a cell blank to skip updating that one field for that one product.
4. **Step 3 — Upload completed CSV**: choose your edited file. A progress bar tracks each row as it processes.
5. When it finishes, a results summary reports how many products were updated versus skipped, plus a list of any specific row errors so you can fix and re-upload just the problem rows if needed.

> **The template reflects your current filters:** if you want to bulk-update a specific subset of products (say, everything in one category or matching a search), apply that search/filter first, then open Update Inventory — the downloaded template will only include what's currently showing.

Step 4: Export

- **Export Page** — downloads a CSV of just the products currently visible on this page
- **Export All** — downloads your entire catalog across every page; for a large catalog this shows a progress bar counting through each page as it's collected before the final file downloads

> **Stock Locations:** if SL Inventory & Stock Location Management is installed and active, the Location column here reflects its Main Section / Sub Location data, and that data can also be managed directly via the Stock Locations tab in Extensions (Section 26).

11. Equipment Rental

Equipment Rental is a feature built directly into Streamline POS itself — not a separate plugin. It tracks gear you rent out — BCDs, regulators, full package rentals — separately from ordinary sales, with its own status workflow and deposit handling.

Step 1: Build a Rentable Product in WooCommerce

A rental product is just a normal WooCommerce product — there's no special product type or extra plugin fields required. What makes it show up on the Rental tab is purely which **category** it's assigned to:

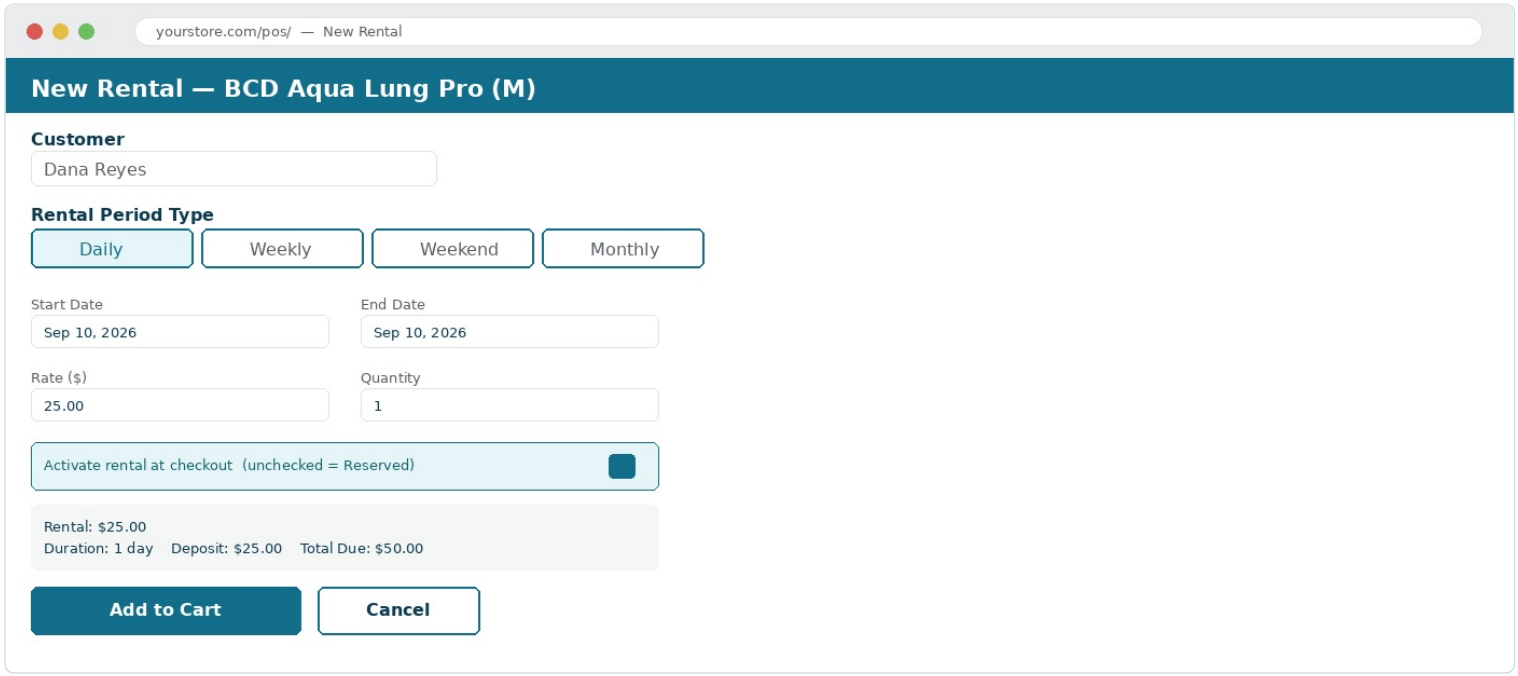
1. In WordPress, go to **Products → Add New** (or edit an existing product) as you normally would for any item you sell.
2. Fill in the Name, a Regular Price (this is used as the fallback rate if a rental period type has no rate configured — Step 2 below), and an image, exactly as you would for a retail product.
3. Under **Product Categories**, assign it to whichever subcategory you're using for that type of gear (e.g. "Regulators" or "BCDs") underneath your main rental category.
4. Publish the product.
5. Back in POS, go to **Settings → Rental** and make sure that same category (or its parent) is selected as your **Main Rental WooCommerce Category** (Step 2 below) — once it is, the product appears automatically on the Rental tab with no further linking needed.

> **A product can do double duty:** the same WooCommerce product can be sold normally on your website or from the main POS product grid, and also appear on the Rental tab — being in the configured rental category is the only thing that matters, and it doesn't stop the product from being purchased outright elsewhere.

Step 2: Turn On Rental and Configure Rates

1. Go to **Settings → Rental** and check **Enable Equipment Rental** — this adds the Rental tab to the main POS screen.
2. Optionally check **Track Equipment Availability** — a date range selector then appears on the rental screen, and products already rented during an overlapping date range show as "Unavailable."
3. Choose your **Main Rental WooCommerce Category** — the top-level category (and its subcategories) that populates the Rental tab.
4. For each subcategory (e.g. Regulators, BCDs, Full Packages), set which rate types are enabled — Daily, Weekly, Weekend, and/or Monthly — and their dollar amounts, plus whether a deposit is required and how much.

Step 3: Start a New Rental



The rental creation form — period type, dates, deposit, and the Active/Reserved toggle.

1. Click the **Rental** tab on the main POS screen and tap the product being rented.
2. Search for the customer, or click **New** to create one on the spot — a customer is required before the rest of the form is usable.
3. Choose the **Rental Period Type**: only the types you enabled in Step 2 appear as buttons here (Daily, Weekly, Weekend, Monthly). Clicking one automatically fills in a matching End Date from today (e.g. Weekend sets a 3-day span) and pulls in that period's rate.
4. Adjust **Start Date** and **End Date** if the actual rental period is different — the total is recalculated live as you change them.

5. Adjust **Rate** or **Quantity** if needed.
6. If a deposit applies, enter it in the **Deposit** field (pre-filled from your Settings → Rental configuration, but editable per rental).
7. Decide whether this rental should be **Active** or **Reserved** using the **Activate rental at checkout** checkbox: leave it checked for a customer taking the gear today (it becomes Active the moment payment completes); uncheck it for a future pre-booking — the equipment is logged and reserved for those dates but doesn't count as currently out until it's actually picked up and switched to Active later.
8. If this rental is complimentary — included in a class or trip package at no extra charge — check **Included — No Charge**. The equipment is still tracked normally, just billed at $0.
9. Add any **Notes** (condition, serial numbers, etc.).
10. Review the subtotal box, which shows the rental charge, the exact duration it calculated, the deposit, and the total due.
11. Click **Add to Cart**, then complete checkout normally (Section 4) — cash, card, split payment, whatever the customer is using. The rental record itself isn't actually saved until the payment completes.

Status Tabs

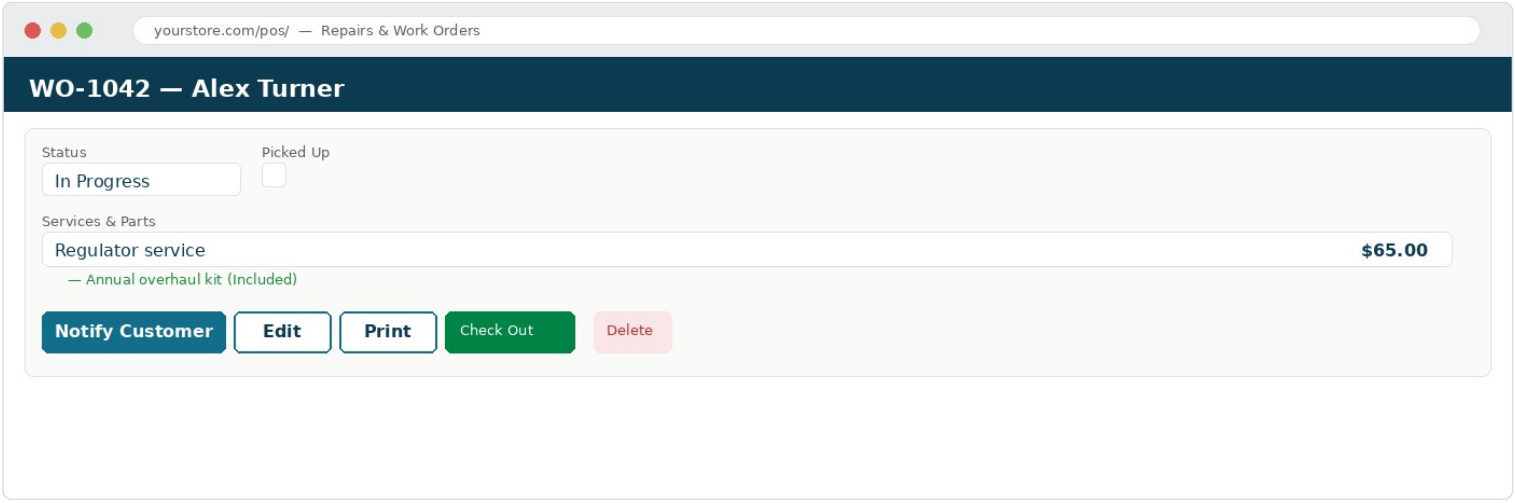
Tab	Meaning
Active	Currently out with a customer, within its rental period
Reserved	Booked for a future date range, not yet picked up
Overdue	Past its return date and not yet returned
Returned	Completed rentals, with deposit and any damage charge recorded
All	Every rental record regardless of status

Step 4: Return Rentals

1. Open a rental group and check off the items being returned.
2. For each returned item, optionally record a **deposit refund** amount and a **damage charge** amount, with notes.
3. Submit — a deposit refund and/or damage charge is added to the register as its own cart line ("Deposit Refund — [item]" or "Damage Charge — [item]"), so the transaction is fully reflected in your day's sales and cash drawer once you complete that checkout.

> **Icon:** click the Rental tab's icon in Settings to open the icon picker (Section 15) and choose a different one.

12. Repairs & Work Orders



A single work order — status, pickup tracking, services/parts, and every action button.

Repairs & Work Orders is a feature built directly into Streamline POS itself — it is not a separate plugin, and doesn't depend on anything else being installed. It tracks equipment service jobs from intake to pickup and payment: regulator servicing, BCD repairs, zipper replacements, and similar bench work.

Step 1: Turn It On

1. Go to **Settings → Repairs & Work Orders**.
2. Check **Enable Repairs & Work Orders tab in main POS**.
3. Check **Taxable** if repair charges should be taxed the same way a normal product sale is.
4. Click the icon next to the tab's name to open the icon picker and choose your own icon for it (Section 15 covers the icon picker in full).

Step 2: Define Services — and Understand Where Parts Come From

> **Services are not WooCommerce products.** A "service" (e.g. "Regulator Service," "Zipper Replacement") is defined entirely inside POS itself, under Settings → Repairs & Work Orders — it's just a name and a base cost, with nothing to build in WooCommerce. **Parts** attached to a service are different: those really are your existing WooCommerce products, searched and pulled in by name or SKU, so any part you want to attach needs to already exist as a normal product in your store with its price set correctly.

1. In **Settings → Repairs & Work Orders**, find the service list.
2. Enter a **Service Name** (e.g. "Annual Regulator Service") and a base **Cost**, then add it.
3. To attach a part to that service, search your product catalog by name or SKU and select the match.
4. For each attached part, choose whether it's **Not charged** (bundled into the service's base cost at no extra charge — e.g. a gasket included in a standard service) or billed at its **Live Product Price** (pulls that product's current WooCommerce price and adds it to the job's total automatically, so you never have to manually update a repair's parts pricing when your product prices change).

Step 3: Create a Work Order

1. Click the **Repairs & Work Orders** tab on the main POS screen, then click **New Work Order**.
2. Under **Customer**, search for an existing customer, or type in a new Name, Email, and Phone directly.
3. Under **Services**, choose a service from the dropdown to add it to the job. Each service can have its own parts attached — for each part, either mark it **Not charged** (included in the service price at no extra cost to the customer) or **Add Live Product Price** (pulls that product's current store price and adds it to the job's total).
4. Add anything relevant in **Notes**.
5. Set the initial **Status** (see the status list in Step 4).
6. Save. The work order appears in the list immediately with a generated work order number.

Step 4: Move a Work Order Through Its Statuses

Right on the work order's row, change its **Status** dropdown at any time — no separate save step:

Status	Meaning

Started	Job has been logged but work hasn't begun yet
In Progress	Actively being worked on
Waiting for Parts	Held up on a part that hasn't arrived yet
Completed	Work is finished and ready for the customer
Paid	Customer has paid — set automatically once you check it out (Step 5), or manually if paid another way

Separately from Status, check the **Picked Up** box once the customer has actually collected their equipment — a date field appears next to it (defaulting to today) so you have a record of exactly when it left the store. This is independent of Status and independent of whether it's been paid, since a repair can be picked up and paid for in either order.

If you run more than one register (Section 24), each work order also has its own **Register** dropdown, so you can assign or reassign which register is handling it.

Step 5: Notify the Customer — With an Optional Pay Now Link

1. Click **Notify Customer** on the work order (grayed out if there's no email on file for that customer).
2. The email always includes the work order's current status and its services — add an optional personal note in the message box if you want.
3. If the work order has a total greater than $0, a checkbox appears: **Include a "Pay $[amount] Now" button — takes the customer straight to checkout**. Check this to let the customer pay online immediately from the email, without having to come into the store or call in a card number.
4. Click Send. The email goes out using the branding you configured in Settings → Repairs Template (Section 25) — including that same Accent Color as the actual color of the Pay Now button, if you included one.

Step 6: Check Out a Work Order In-Store

When the customer is paying in person rather than through the emailed Pay Now link:

1. Click **Check Out** on the work order (only shown once it has a total greater than $0 and isn't already marked Paid).
2. The work order's full amount is added to your current cart as a single line item, named after the work order number and its services — the cart closes the Repairs screen and returns you to the main POS screen automatically.
3. Complete the sale exactly like any other checkout (Section 4) — cash, card, split payment, whatever the customer is using.
4. Once payment completes, the work order is automatically marked **Paid** — you don't need to go back and change its status yourself.

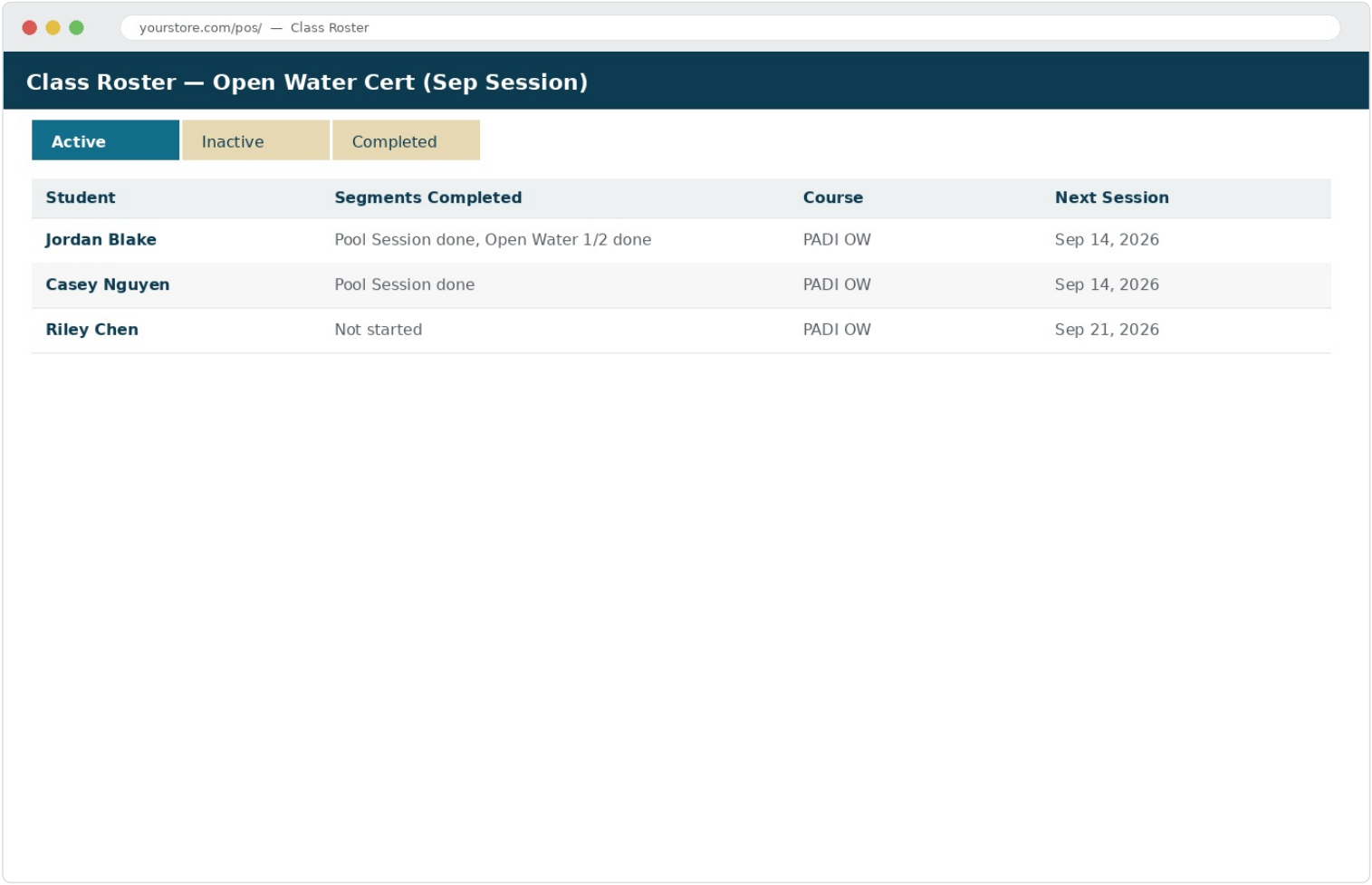
Other Actions on a Work Order

- **Edit** — change the customer, services, parts, or notes on an existing work order
- **Print** — print this work order as a physical ticket or receipt
- **Delete** — permanently removes the work order; there is no undo

Repairs Template

Covered fully in Section 25 — this is where you set the logo, colors, and badge label used on every "Notify Customer" email, including the actual Pay Now payment button when one is included.

13. Registration Info & Class Roster



Class Roster — registrants for a course, grouped by Active, Inactive, and Completed.

Step 1: Build a Course Product in WooCommerce

Before a course can be added to Class Roster, it needs to exist as a real WooCommerce product — this is what customers actually buy at checkout (in person or online) to register.

1. Go to **Products → Add New** in WordPress.
2. Fill in the course Name (e.g. "PADI Open Water Certification"), Price, and description as normal.
3. For a simple, standalone course with no add-ons: leave the **Product Type** as **Simple product**. This is all you need for most courses.
4. For a course that should automatically detect its own cert cards, checkout dives, or an add-on course as separate line items on Class Roster: set **Product Type** to **Grouped product** (WooCommerce's native type) — or use the WooCommerce Smart Grouped Products plugin's equivalent format if you have it installed — and add those related items as its grouped/child products.
5. Publish the product.

Step 2: Set Up Registration Info (Settings → Registration Info)

This is where you define what "registering" for a class or trip means for your store. It's the underlying field-and-trigger configuration behind Class Roster, kept as a separate settings tab because it can be used even without Class Roster enabled (for example, to just collect extra information at checkout).

- **Categories / SKUs** — choose which WooCommerce categories, or specific SKUs, should show a Registration Info form at checkout (typically your class and course products)
- **Custom Fields** — build the exact form fields collected. Defaults provided out of the box: Name, Date of Birth, Address, City, State, Zip, and Student Name (useful when a parent registers a minor). Add your own fields with a label and type (text, date, etc.), and drag to reorder.

Step 3: Link the Product to a Course in Class Roster (Settings → Course Roster)

Once enabled, **Class Roster** adds a tab to the main POS screen listing everyone registered for a course, matched against the Registration Info collected on their order. The link between a WooCommerce product and a Class Roster "course" entry is made entirely here in Settings — never on the WooCommerce product edit screen itself.

1. In **Settings → Course Roster**, click to add a new course entry.
2. Use the product search box to find the WooCommerce product you built in Step 1 by name or SKU, and click it to link it to this course entry.
3. Add a **Course Detail** description.

4. Add one or more **Segments** — each with its own location, dates, and an optional skills/tasks checklist.
5. If the linked product is a Grouped or Smart Grouped product (Step 1), click **Refresh** next to "Add-ons / Bonus Items on this Product" to confirm its child items were detected — if nothing shows up, double-check the product's type and that it actually has child products added in WooCommerce.

Course Reference Files

Each course entry in **Settings → Course Roster** has its own **Reference Files** section — upload forms staff may need for that course (a referral form, a medical/physician form, a liability form, etc.) using the same Media Library picker described in Section 24 (browse/search/filter by folder, or upload a new file — generalized here to handle PDFs and other documents, not just images, shown with a file icon in place of a thumbnail).

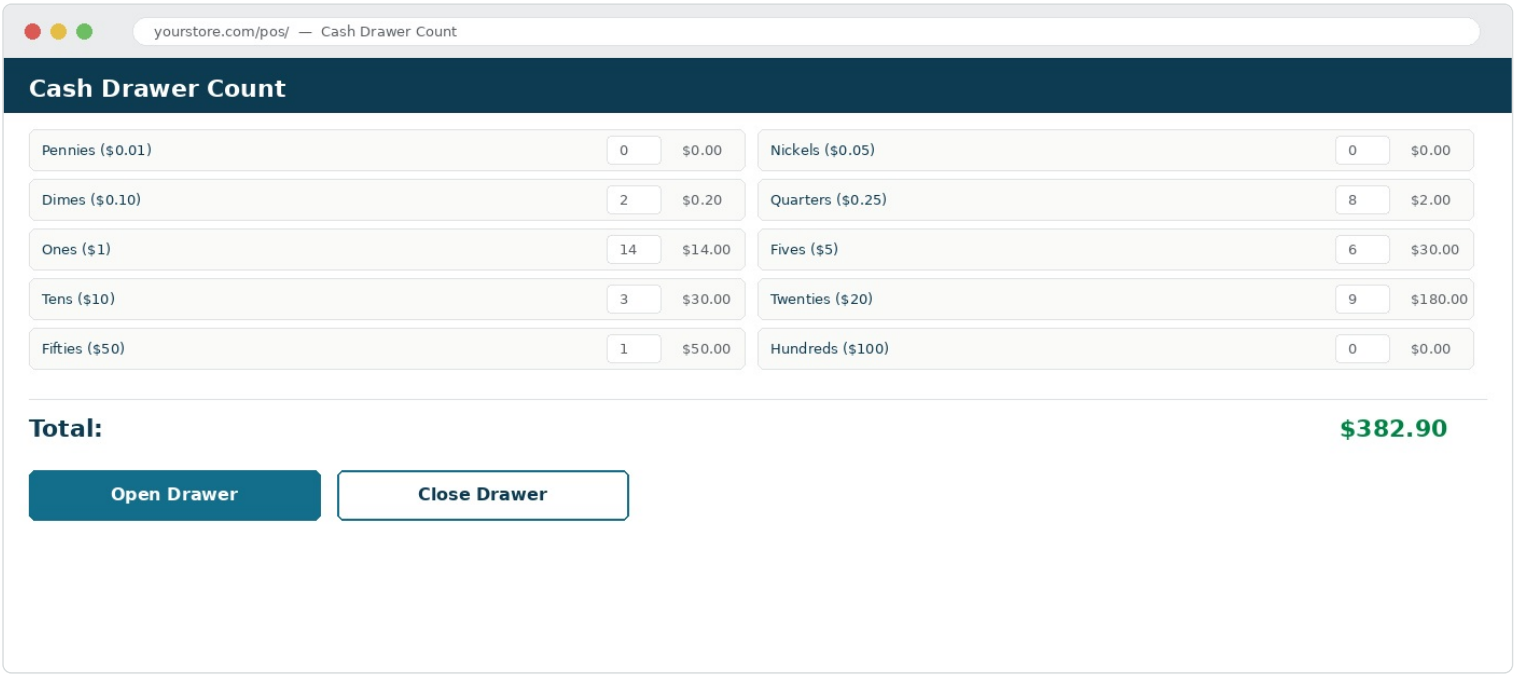
On the main POS Class Roster screen, selecting that course in the filter shows a **Files** button whenever it has any reference files attached — click it for a quick dropdown to view or open them, without needing to go into Settings to find them.

- **Instructors** — add instructors, then assign who taught each segment from the Class Roster page itself
- **Active / Inactive / Completed** workflow:
  - Registrants who haven't finished every segment within a configurable number of days automatically move to **Inactive** (moving someone back to Active resets that countdown)
  - When a course is marked complete without Cert Agency, Cert Type, and Cert Date filled in, Class Roster asks whether to fill them in now or delay the move to **Completed** for a set number of days
  - When a student's course moves to Completed, their info updates automatically in Contacts if they're already there — or Class Roster offers to add them using their Class Roster information
- **Importing students** — use the Import button on the Class Roster page itself (not the retired Settings-page version), which includes duplicate protection, Cert Type linking to your Titles & Certs list, multi-course-per-row support, an option to sync Contacts, and a full results report
- **Per-student documents** — each registrant's card on Class Roster has its own **Upload File(s)** button, for attaching a document to that specific student's matched contact record. Like Course Reference Files above, it offers **Choose from Media Library** alongside a plain file picker, so you can reuse an existing file or upload a new one the same way. If their course has reference files attached (above), a separate **Course Files (n)** link also appears right on their card.

> **Smart Grouped Product detection:** if a course's product is set up as a Grouped (or "Smart Grouped") WooCommerce product, its own items — cert cards, checkout dives, an add-on course — are detected automatically and shown alongside the registrant on Class Roster when their order includes them as separate line items. If nothing is detected, the product likely isn't actually set as a Grouped/Smart Grouped type, or has no child items added to it yet — check Step 1.

14. Reports & Cash Drawer History

Step 1: Open a Drawer at the Start of a Shift



Cash Drawer Count — count every denomination, then Open or Close the drawer.

1. Click **Cash Drawer** in the header (requires the No Sale permission — Section 17).
2. If you run more than one register, choose **Which register are you counting?** at the top.
3. Count the physical cash in the drawer and enter how many of each you have: Pennies, Nickels, Dimes, Quarters, Ones, Fives, Tens, Twenties, Fifties, and Hundreds. Each row shows a running dollar amount for that denomination as you type.
4. Check the **Total** at the bottom against what you expect to be starting with.
5. Click **Open Drawer**. This logs a timestamped "open" entry — who counted it, when, which register, the total, and the exact denomination breakdown.

Step 2: Close a Drawer at the End of a Shift

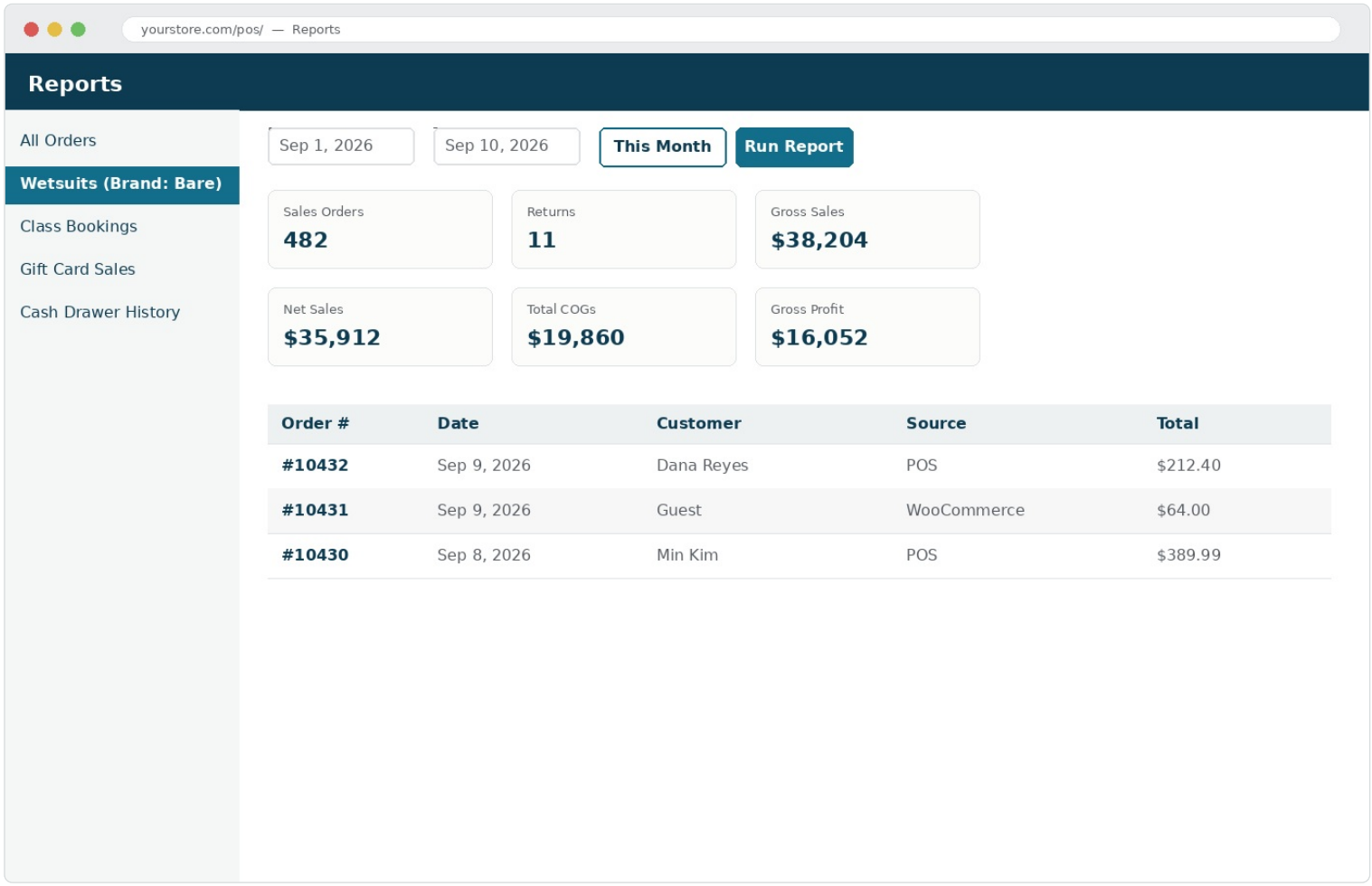
1. Click **Cash Drawer** in the header again.
2. Count the drawer the same way as Step 1.
3. Click **Close Drawer**. This logs a matching "close" entry with its own timestamp, total, and denomination breakdown, then clears the counter back to zero ready for the next person.

> **This is saved to your site, not just this device:** every Open and Close entry is sent to and stored on your WordPress database the moment you click the button — it isn't purely a local, this-browser-only record. If the save fails for some reason (e.g. no internet connection at that moment), a warning notification tells you it was saved locally but couldn't sync, so you know to check that entry later rather than assuming it's always been safely recorded remotely.

Step 3: Review Cash Drawer History

1. Open the **Reports** window and find the **Cash Drawer Log** section of the sidebar.
2. Choose a date range using the quick presets (Last 7 Days, This Month, This Quarter) or set a Custom range.
3. If you have more than one register, filter to a specific one.
4. Click any entry in the list to expand it and see the full denomination breakdown for that specific count (e.g. 3 × $20 = $60.00).
5. Click **Export CSV** to download every entry in your selected range, denomination counts included — leave the date range blank first to export the complete history instead of just one window.

The Reports Window



The Reports window — date range, summary cards, and the full order table.

Click **Reports** in the header (requires the View Reports permission — Section 17). The left sidebar switches between All Orders, your custom named reports (built in Settings → Reports, Section 23), Received Products Cost (below), and Cash Drawer Log.

1. Set a date range using the **From / To** pickers, or a quick preset: Today, This Month, Last Month, Q1–Q4, H1/H2, This Year.
2. Choose a **Source**: POS + WooCommerce combined, POS only, or WooCommerce only.
3. If you run more than one register, use the register filter to narrow to just one.
4. Click **Run Report** to fetch fresh data for your selection.
5. Click **Export CSV** for a spreadsheet with one row per line item; returns are shown as parenthetical (negative) amounts.

Reading the Summary Cards

Ten cards update automatically every time you run a report. Hover any card for a tooltip explaining exactly what it counts and its formula:

Group	Cards
Orders & Returns	Sales Orders count, Returns count
Sales Figures	Gross Sales (before discounts), Net Sales (after discounts and rewards)
Cost & Profit	Total COGs (cost of goods sold), Gross Profit (Net Sales − COGs)
Adjustments	Tax Collected, Discounts, Rewards Used, Store Credit Used

Below the summary cards, the full order table lists every order: Order #, Date, Customer, Source, Status, Items (with cost), Subtotal, Discount, Rewards, Store Credit, COGs, Shipping, Tax, Total, and Payment method.

Received Products Cost

Select **Received Products Cost** in the Reports sidebar for a record of restocking spend — every individual receiving event (Section 8) within a chosen date range, backed by its own server-side history table so it's reliable across devices and doesn't disappear when a browser session ends.

1. Set a date range, or leave it blank for all time.
2. Review the three summary tiles: **Receiving Events**, **Total Units Received**, and **Total Cost to Restock**.
3. The table below lists each event: Date Received, Product, SKU, Qty, Cost Each, Line Cost (Qty × Cost Each), and Invoice/PO #.
4. Click **Export CSV** to download the full list for the selected range.

> **Undoing a Received item cleans up this history too:** clicking Undo on the Received view (Section 8) removes that event from this report as well, not just from the Reordering Report itself — so accidentally marking something Received, undoing it, then receiving it again for real won't

double-count it here.

Stock Report

Go to **Settings → Reports** and add one or more **Stock Report Configs** — each a named stock total (e.g. "All Products," "Rental Stock") scoped to whichever categories you pick, or left with no categories for "all categories." Every config you create then shows up as its own entry in the Reports sidebar.

1. Select your Stock Report from the Reports sidebar.
2. Use the **To** date field to choose which date you want stock as of. The **From** field is disabled for this report type — a message explains to use To instead, since a stock total is a single point-in-time snapshot, not a range.
3. Click **Run Report** to see **Total Qty** (actual units, not product count — 10 units of one product count as 10, not 1), **Retail Value**, and **Cost Value** as of that date.
4. Click **Export CSV** for a per-product breakdown — Name, SKU, Qty, Price, Cost, and each product's line retail/cost value — reusing whatever date and category filter the report is already showing. Check **Exclude zero qty** (checked by default) to leave out-of-stock products off the export entirely; this only affects the CSV, never the on-screen totals.

A real historical limitation, worth understanding rather than assuming: WooCommerce itself keeps no history of past stock levels, only whatever's currently on the shelf. This report works by capturing a daily snapshot going forward from when you first start using it — so any date from today onward will show a genuinely accurate total. A date from *before* snapshots started has nothing real to read; the report falls back to showing your *current* stock for that date instead, clearly labeled as an estimate rather than passed off as real history it doesn't have. If a specific date has no snapshot of its own for some other reason, it shows the nearest date that does have one instead, labeled accordingly.

Negative stock never skews the totals: an oversold or backordered product (negative quantity) is treated as 0 wherever stock is summed or shown, both on-screen and in the export — it isn't real negative physical inventory, so it can't drag your total down (or, if excluded incorrectly, artificially inflate it either).

15. Settings — Categories

This screen builds the category tabs and subcategory tabs that appear across the top of the main POS screen (Section 2), and controls exactly which one loads automatically the moment the POS opens. Go to Settings → Categories to begin.

Step 1: Understand the Lock

At the top of the screen is a large banner that is either:

- **Categories Locked** (red banner) — the normal, everyday state. Names, icons, order, and product assignments are all frozen and cannot be changed. This is what you want turned on during normal store hours, so a cashier can't accidentally rename or delete a category mid-sale.
- **Categories Unlocked** (green banner) — editing mode. All the tools described below (Add Category, Add Subcategory, Assign Products, and every icon/name/order/delete control on the list) only appear or become clickable while unlocked.

1. Click the button on the right side of the banner — it reads **Unlock to Edit** when locked, or **Lock Categories** when unlocked — to flip between the two states.
2. A confirmation notification briefly appears at the top of the screen confirming the new state.

> **Always lock again when you're done.** There's no auto-lock timer — if you leave the screen unlocked, anyone with Access Settings permission (Section 17) can rename, reorder, or delete categories.

Step 2: Add a Category

With categories unlocked, an **Add Category** box appears near the top of the screen:

1. Type the category's name into the **Name** field — this is exactly what will appear on its tab on the main POS screen (e.g. "Wetsuits", "Regulators", "Gift Cards").
2. Click the icon button next to the name field (it shows a default storefront icon until you pick something else) — this opens the **Choose Icon** picker. See "The Icon Picker" below for what happens next.
3. Click **Add**. The new category immediately appears at the bottom of the Categories list further down the screen, and as a new tab on the main POS screen.

Step 3: Add a Subcategory

Just below Add Category is an **Add Subcategory** box:

1. Open the **Select Category** dropdown and choose which existing category this subcategory belongs under.
2. Type the subcategory's name into the Name field.
3. Click **Add**. The subcategory appears nested under its parent category, both in the list on this screen and as a second row of tabs under that category on the main POS screen.

Step 4: Assign Products to a Category or Subcategory

The **Assign Products** box is how you control which products actually show up under each tab:

1. Open the first dropdown and select a **Category**.
2. Open the second dropdown and select a **Subcategory** within it (this stays disabled/grayed out until you've picked a category first).
3. Type at least 2 characters into **Search products by name or SKU**. Matching products appear in a results grid below as you type (fewer than 2 characters just shows a prompt to keep typing; a genuine no-match shows "No products found") — a product currently on sale shows the same ON SALE ribbon and struck-through regular price described in Section 2.
4. Click any product in the results grid to assign it — it's added to that subcategory immediately, with no separate save step.
5. Repeat the search for as many products as you want to add. A product can be assigned to more than one subcategory at once if it genuinely belongs in both.

> **Tip:** to see what's already assigned to a subcategory, or to reorder or remove products from it, scroll down to that subcategory's entry in the main Categories list below (Step 6) rather than using the Assign Products search box, which is purely for adding new ones.

> 🌐 **WordPress Category — auto-fill a subcategory from a real WooCommerce category instead of assigning products one at a time.** Each subcategory row in the Categories list (Step 6) has its own **WordPress Category** dropdown, listing every WooCommerce product category on your site with subcategories indented beneath their parent (e.g. "Regulators" then an indented "↳ Octopus"), so a subcategory doesn't get lost far away from its parent in a long flat list. Pick one and every product already in that WooCommerce category shows here automatically — a green "✓ auto-included" label confirms it's active. You can still manually assign extra products on top of it (useful for adding one stray item from a different WooCommerce category); by default the two lists are merged with your manually-assigned products kept in their configured order first, followed by the rest of the WooCommerce category's products alphabetically — see below to change either of those. Choose "— None (manual assignment only) —" to go back to assigning products entirely by hand.

Once a WordPress Category is selected, two more controls appear for that subcategory:

- ↕ **Product Order** — how the products are sorted within the subcategory: Default order, Newest first, Oldest first, Price high to low, Price low to high, Name A→Z, Name Z→A, Product ID, Products on Sale 1st, Products on Sale last, or Show Only Products on Sale (which hides everything else, including individual variations of a product that aren't themselves on sale, rather than just reordering).
- **Show first** — whether your manually-added ("Single products added") products or the WordPress Category's own products appear first in the grid, when both are present.

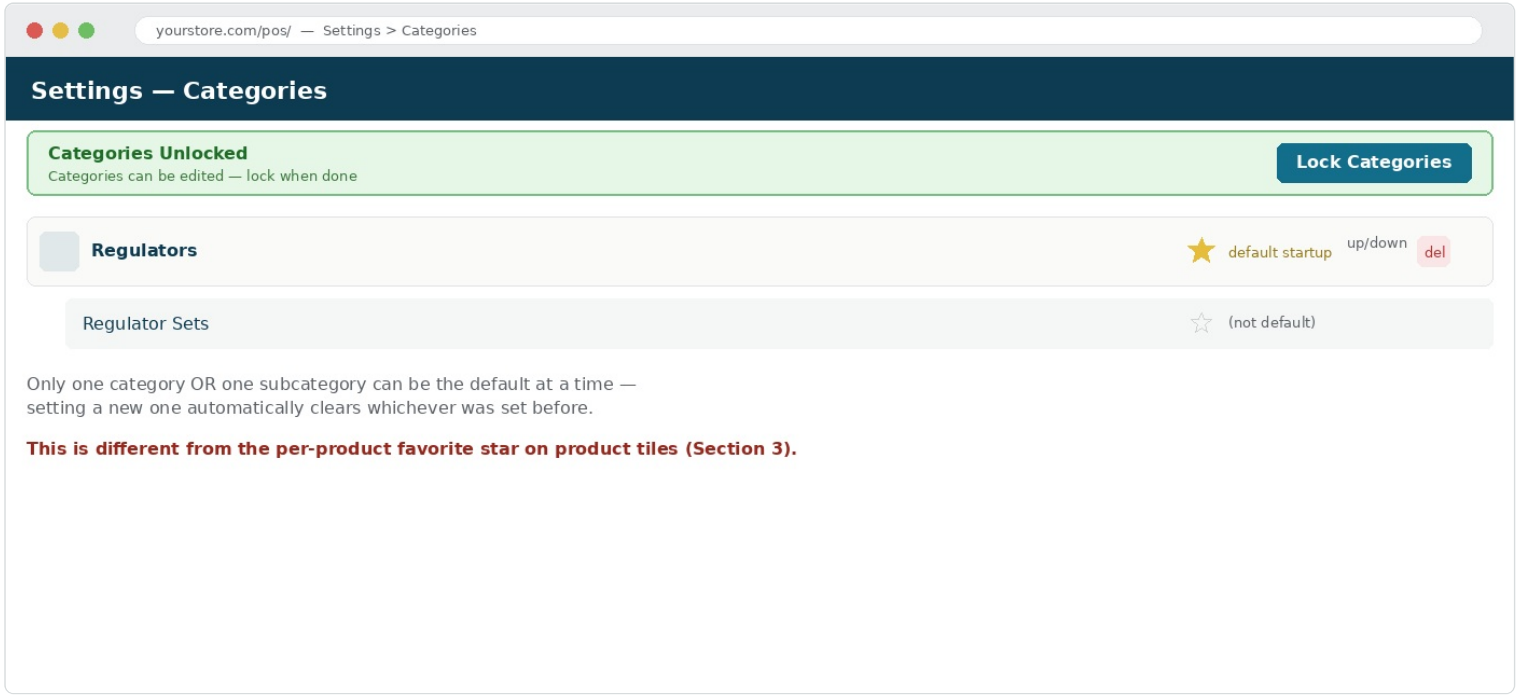
Existing subcategories are unaffected until you actually pick something other than Default order.

Step 5: The Icon Picker

Whenever you click a category or subcategory's icon (while unlocked), the **Choose Icon** window opens:

- **Icon Library** — a grid of built-in emoji icons. Click any one to apply it immediately and close the picker.
- **Custom Icons** — any icons you've personally added before appear in their own row here, for reuse. Hover over one and click the small × that appears to delete it from this list permanently.
- **Add Custom Icon** — to use an icon that isn't in the built-in library: find any emoji on a site like emojipedia.org, copy it (Ctrl+C), click into the "Paste emoji here..." field and paste it (Ctrl+V), then click **Add Icon**. It's applied right away and also saved into your Custom Icons row for next time.

Step 6: The Categories List — Every Control Explained



Every category and subcategory row, with the default-startup star called out.

Below the three boxes above, every category you have is listed, in the order they appear as tabs on the main screen. For each category row:

Control	What it does
Icon (left)	Click to open the Icon Picker and change it (unlocked only)
Name field	Type directly into it to rename the category (unlocked only)
Star	Sets this category as the default startup view — see Step 7. Always clickable, even while locked.
Up / Down arrows	Moves this category earlier/later in the tab order (unlocked only)
Trash icon	Deletes the category entirely, including its subcategories (unlocked only) — there is no undo, so double-check before confirming

Nested underneath each category, every subcategory has its own row with the same Name field, Star, Up/Down, and Trash controls. Nested under *that*, every product assigned to the subcategory is listed by name and SKU, each with its own Up/Down arrows (to control its position within that subcategory's product grid) and a Trash icon to remove it from the subcategory (this does not delete the product itself from your store — it only un-assigns it from this particular subcategory).

Step 7: The Default Startup Star — Which Tab Loads When POS Opens

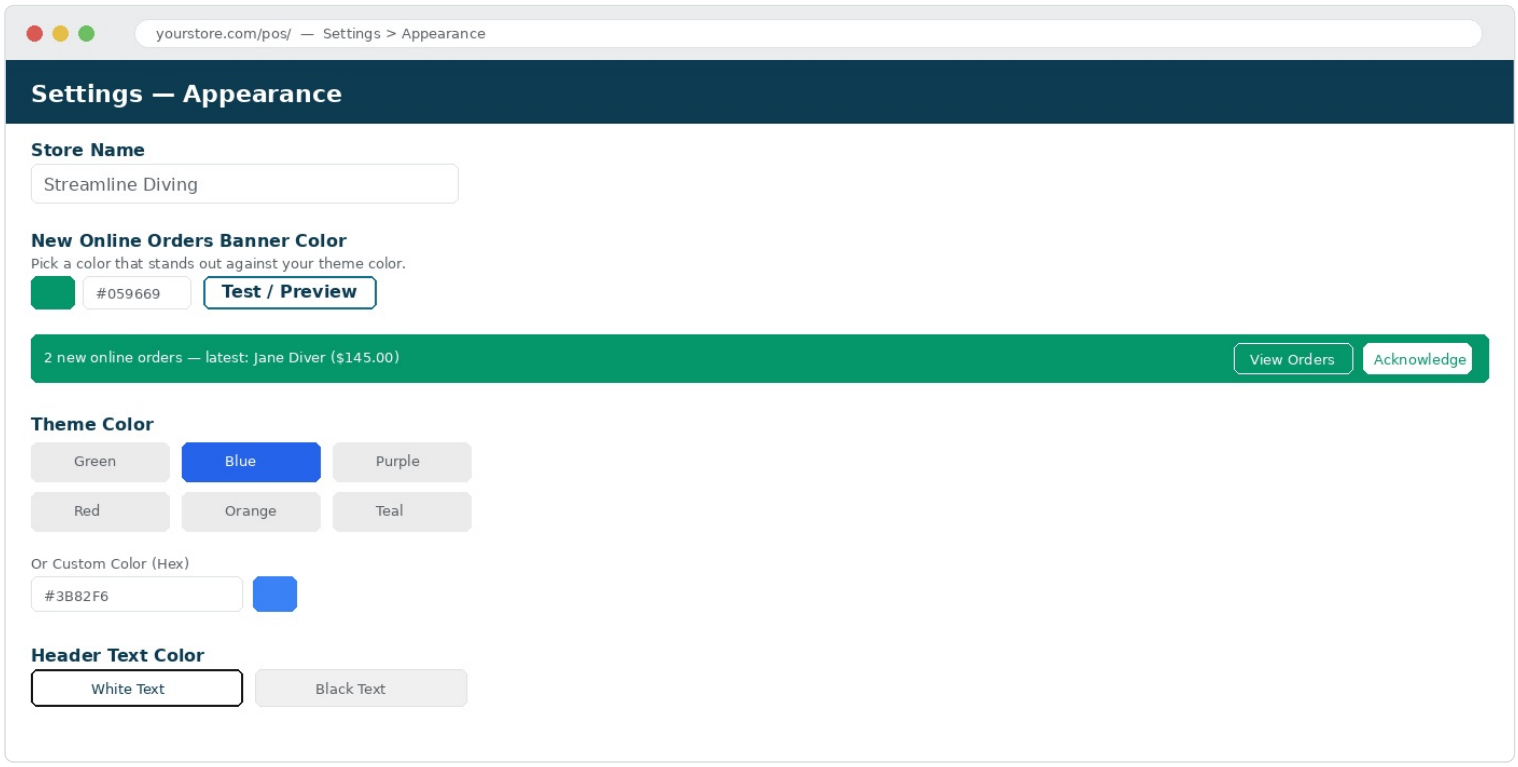
This is the setting that controls what a cashier sees the instant the POS loads. It is completely separate from the small favorite star on individual product tiles (Section 3), which just bookmarks one product for that cashier's own quick access. This star, here in Settings → Categories, decides which *category or subcategory tab* the whole POS screen opens to by default.

1. Find the category (or subcategory) you want the POS to show automatically on startup.
2. Click its star. It turns solid gold/yellow, and a confirmation notification names exactly what was set as the default.
3. Every other star in the entire list automatically goes back to empty/outline — only one category *or* one subcategory can be the default at any time, never both, and never more than one.
4. To go back to no default at all (the POS will then just open to whichever tab it happened to be on last), click the same gold star again to clear it.

You can set the star on a top-level category (the POS opens directly to that category, showing its own products or its first subcategory) or on a specific subcategory nested inside a category (the POS opens straight into that exact subcategory) — whichever is more useful for how your store actually operates day to day.

> **Example:** if your shop mostly does walk-in retail with rentals as a smaller side business, set the star on your main retail category (e.g. "Regulators" or whatever you sell most of) so cashiers land on the busiest screen immediately, instead of having to tap through tabs first thing every morning.

16. Settings — Appearance



Every Appearance field, including the New Online Orders banner live preview.

Go to Settings → Appearance. Everything here saves as part of your overall settings — click Save All Settings at the top of the Settings window when you're done, the same as any other tab.

Store Name

Type your shop's name into this field. It appears next to your logo (if you've set one) in the POS header, on the main screen, at the top of every modal, and on the customer-facing display if that's enabled (Section 24).

Product Image Display

Controls how product photos are fit into their thumbnail on the main POS product grid, the Equipment Rental grid (Section 11), and the search-results popup (Section 2):

- **Fill (crop to fit)** — the original, default behavior. The photo is scaled and cropped so it fills the whole thumbnail with no empty space, which can crop off the edges of a tall or non-square photo (a Suunto watch or gauge shot, for example).
- **Fit whole image (no cropping)** — shows the complete photo with nothing cropped off, adding a small amount of empty space around it if its shape doesn't match the thumbnail exactly.

Click whichever option you want — it applies immediately across the POS grid, Equipment Rental grid, and search results together; there's no way to set it separately for just one of the three.

New Online Orders Banner Color

When a customer places an order on your website while the POS happens to be open, a colored banner appears automatically across the top of the main screen — you don't have to do anything to trigger it, and it isn't a popup you have to dismiss to keep working.

1. Click the color swatch to open your browser's color picker, or type a hex code directly (e.g. `#059669`) into the text field next to it.
2. Click **Test / Preview** to force the banner to appear right now, using sample data ("2 new online orders from your website — latest: Jane Diver ($145.00)"), so you can check your color choice against your theme without needing a real order to come in.
3. Click **Close Preview** (the button relabels itself while previewing) to dismiss the test banner.

When a real new order arrives, the banner shows the actual count and the most recent customer/total, with two buttons:

- **View Orders** — opens the Orders screen (Section 7) and marks the new orders as acknowledged
- **Acknowledge** — dismisses the banner without opening anything, for when you've already seen the order elsewhere (like on your phone) and don't need to look at it again right now; only the orders the banner is currently showing are marked seen, and the POS re-checks for anything newer right away rather than waiting for the next minute's poll

> **Why change the color at all:** pick something that visibly contrasts with your Theme Color below — if your whole POS theme is already green, a green banner can blend in and go unnoticed at a glance.

What counts as a "new online order": any order placed on your website counts, including Apple Pay and Google Pay checkouts — GoDaddy Payments records those under their own internal source labels, which earlier versions didn't recognize as online orders at all. POS sales, orders you create yourself in wp-admin, and Travel Booking's internal payment records never trigger the banner. An order only counts once it's actually paid (or was created more than a couple of days before your last Acknowledge, to still catch one paid late) — a draft, pending, failed, or cancelled order won't raise it, and an order isn't missed just because it sat unpaid for a while before being completed.

The "last acknowledged" point is now permanent per register. It's stored in the browser itself (not tied to a single tab or browsing session), so opening a new tab, restarting the browser, or a plain page reload will never make an already-acknowledged order reappear as new.

Header Logo URL

1. Paste the full web address of your logo image (e.g. `https://yoursite.com/logo.png`) into the field.
2. A live preview of the image appears directly below the field as soon as it loads successfully, so you can confirm it's the right image before saving.
3. If the URL is wrong or the image fails to load, the preview simply doesn't appear — there's no error message, so double-check the address if you expect to see a preview and don't.

Theme Color

Sets the accent color used throughout the POS — header background, buttons, active tab highlights, and more.

1. Click one of the six preset swatches: **Green, Blue, Purple, Red, Orange, or Teal**. Whichever one you click immediately highlights as selected and becomes your live theme.
2. Alternatively, ignore the presets and set **Or Custom Color (Hex)** instead — type a 6-digit hex code (e.g. `#3B82F6`) or click the color swatch next to it to pick visually. Entering a custom color automatically switches you off whichever preset was selected.
3. Click **Clear** (only shown once a custom color is set) to remove the custom color and fall back to the Blue preset.

Header Text Color

Choose **White Text** or **Black Text** for the store name and popup titles shown against your Theme Color. Pick whichever one is actually readable against the color you chose above — a light Theme Color (like a pale custom hex) usually needs Black Text, while every dark preset (Green, Blue, Purple, Red) needs White Text.

17. Settings — Users & Permissions

> **Start here, not on this screen: Settings → Users does not have an "Add User" button — you cannot create a new account from this tab. New employees, and any change to their username, password, or account details, are handled entirely by the header's User Management modal instead (Step 1 below). This Settings tab is only for setting an existing user's detailed permissions and sending them their password link.**

Step 1: Create the Account First

1. On the main POS screen, click **Users** in the header (only visible if you're logged in as an Administrator).
2. In the **Add New User** box, fill in Username, Email, Full Name, and Password.
3. Choose a **Role**: Administrator, Manager, Cashier, or Staff. This only sets a starting default for the permissions in Step 2 below — it does not lock the account into that role permanently, and you can change every individual permission afterward regardless of which Role you pick here.
4. Click **Add User**. The account is created immediately and appears in the Existing Users list on this same modal.

Full detail on this modal — editing an account, searching/sorting, deleting a user — is in Section 2.

Step 2: Set Their Detailed Permissions

1. Go to **Settings → Users**. Every account you've created appears here as its own card, showing their username, email, and role.
2. Find the user you just created (or any existing user you want to adjust).
3. Check or uncheck any of the permissions listed in the table below — each change applies to this specific user only and takes effect the moment you check the box (no separate per-user save button).
4. When you're done adjusting any users on this screen, click **Save All Settings** at the top of the Settings window to write everything to the database.

> **Unchecking a permission now reliably removes access, for every permission on this screen:** an older version of a user's account record used to fall back to that role's own built-in default for a permission it had never explicitly recorded, even if the checkbox here showed it unchecked — meaning a checkbox could display as off while the user still actually had access underneath. This is fixed across every permission in the list — the checkbox and actual access now always agree. If a user's access still doesn't seem to match what their checkboxes show, that's worth reporting rather than assuming it's expected.

Core Permissions

Permission	What it allows
Edit Price	Modify a product's price during checkout
Apply Discounts	Give a manual $ or % discount on an order — see Discount Options just below for exactly which type(s), how much, and other limits
No Sale (Open Drawer)	Open the cash drawer without a sale
Change Register	Switch which register/drawer they're operating, on stores with more than one
View Reports	Access the Reports window
Access Settings	Open the Settings screen at all
View Cost on Product Cards	See a product's cost of goods directly on its tile in the grid
View Cost in Product Details Popup	See cost of goods in the expanded product detail popup
Bulk Change Order Status	Use the bulk order-status tool in the Orders screen
Edit Product Details	Edit a product's details (beyond just its price) from within the POS
Manage Expenses	Open the 🧾 Expenses screen to add, edit, import and export shop expenses (Section 9). Administrators always have this — the checkbox is checked and disabled on an Administrator's card.

> **A user without Access Settings checked** never sees the Settings button in the header at all — so if you're testing permissions by logging in as that user, don't be alarmed that the button has simply vanished; that's the permission working correctly.

Discount Options (Apply Discounts)

Checking **Apply Discounts** on a user's card reveals a small panel of options right underneath it — these decide exactly what that user can do with a manual discount, separately from WooCommerce coupons, rewards points, and gift certificates, which are never affected by any of this:

- **% Percentage discount** and **$ Dollar amount discount** — tick either or both to choose which type(s) of manual discount this user may give. Unticking a type removes it entirely — that type's button is grayed out for this user at checkout (Section 4b), even if the other type is still allowed.
- **max** (next to each type) — the largest discount this user may give of that type. Leave it blank for no limit. A new Cashier starts with both maximums pre-filled at 10 (10% / $10), matching the old built-in cashier cap — change or clear either one at any time.
- **Do not allow a discount that goes below cost** — ticked by default. With this on, a discount this user enters is capped at whatever would bring the sale down to its total cost of goods (not below); going past that, or past this user's % or $ maximum, shows "Discounted amount too large" at checkout and the discount isn't applied.

> **Administrators are always exempt.** An Administrator account can always give either type of manual discount with no maximum and no below-cost guard, regardless of what's set here — this panel only appears for non-Administrator users.

> **Changed in 4.93.4:** previously, this checkbox had no real effect — whether a manual discount was allowed at all, and how much, was hardcoded by role instead: Staff could never discount no matter how this was set, and Cashiers could always discount up to 10%/$10 whether or not it was checked. This checkbox and the options beneath it now genuinely control it, for every role. If you have existing Cashier accounts, double-check their Discount Options after updating — they'll already show the familiar 10%/$10 maximums, but it's worth confirming that still matches what you want.

Module Access — Equipment Rental, Repairs, Class Roster

If Equipment Rental, Repairs & Work Orders, or Class Roster are enabled store-wide (Sections 10, 11, 12), a matching checkbox appears on each user's card to control whether that specific user sees it:

Checkbox	Hides, when unticked
Equipment Rental	The Rental tab on the main POS screen
Access Repairs / Work Orders	The Repairs tab on the main POS screen, and the Repairs report in Reports (Section 14)
Access Class Roster	The Class Roster tab on the main POS screen

> **On by default — untick to hide.** Unlike most permissions on this screen, all three of these start checked for every user, including everyone who already existed before 4.93.3/4.93.4: nobody loses access to a module they could already see just from updating. Untick a box for the specific users who shouldn't have that module, rather than needing to turn it on for everyone who should.

Step 3: Send Them Their Password (New Employees)

Rather than telling a new hire their password verbally or typing it for them, click **Send Setup Link** on their card in Settings → Users. A confirmation dialog asks you to confirm the email address; once confirmed, they receive an email with a link that lets them set their own password. The link does not expire, so it's safe to send ahead of their first shift.

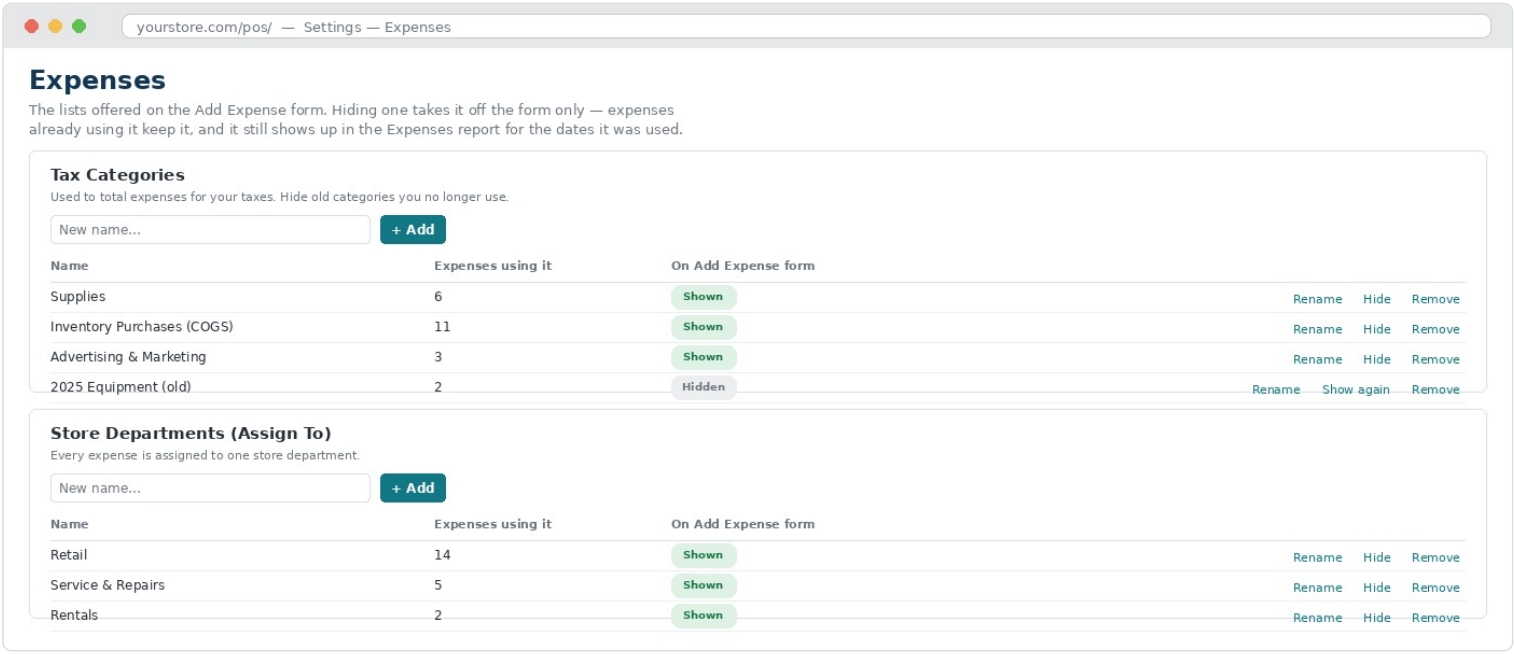
Step 4: Manage Extensions (Optional)

If this user should be able to work with other Streamline plugins from inside the POS (Rewards, Gift Cards, Travel, and so on — Section 26), scroll to the bottom of their card:

1. Check the **Manage Extensions** box. This is the master switch — checking it is what makes the Extensions button appear in the header for this user at all.
2. A tree of every integrated plugin appears indented below, each with its own **Expand/Collapse** arrow so you don't have to scroll through every plugin's options if you're only configuring one.
3. Click into the plugin you want to configure (e.g. "Rewards Plugin:") to expand its own checkboxes, then check exactly which of that plugin's tabs/actions this user should see. The full list of sub-permission checkboxes for every plugin is in Section 26.
4. Leave a plugin's section entirely unchecked to keep this user from seeing that plugin's tab in Extensions at all, even though Manage Extensions itself is on.

> **Reminder:** these permissions only control whether a user with POS access *can see* a given extension tab. They do not install or activate the corresponding SL plugin — see Section 26 for how the two are related.

18. Settings — Expenses



Settings → Expenses — managing the Tax Categories and Store Departments picklists.

This tab manages the picklists offered on the Shop Expenses "+ Add Expense" form (Section 9): **Tax Categories**, **Store Departments (Assign To)**, **Payment Types**, and **Vendors** — in that order on screen.

1. Type a new value into the box under any list and click **+ Add** to add it, without needing to go create a test expense first.
2. Each row shows how many existing expenses currently use that value, and whether it's Shown or Hidden on the Add Expense form.
3. Click **Rename** to change a value's name everywhere it's used, including on past expenses — a prompt shows how many expenses will be affected before you confirm.
4. Click **Hide** to take a value off the Add Expense form's dropdown without touching any expense that already uses it (it still appears normally in the Expenses report for the dates it was used); click **Show again** to restore it to the dropdown.
5. Click **Remove** to delete a value permanently — only available once 0 expenses use it.
6. Check **Show hidden** (appears once at least one value is hidden) to see hidden values in the list again, so you can rename, show, or remove them.

> **Starting a new tax year or a new tax form:** add the new Tax Categories you need and **Hide** the ones you no longer use, rather than renaming an old one into a new one — renaming relabels every past expense that used the old name, which can throw off a prior year's totals.

> **Vendors are usually self-managed.** A new Vendor name is added automatically the first time it's typed on the Add Expense form or brought in on a CSV import, so this tab is mainly for Rename, Hide and Remove on the Vendors list rather than adding them here first.

19. Settings — Discounts (Discount Programs)

Discount Programs are named discount presets you assign to individual customers. Once assigned, the discount auto-applies both in the POS and on your WooCommerce website checkout for that logged-in customer.

Creating a Program

1. Click **+ New Program**.
2. Name it (e.g. "Employee Discount", "Military", "VIP").
3. Choose a **Discount Type**: % Percentage off or $ Fixed amount off, and enter the value.
4. Optionally check **Never go below cost** (the discount won't reduce a price below its recorded cost of goods).
5. Optionally check **Tax exempt**.
6. Optionally check **No discount amount (tax exempt only)** — for a program that only removes tax and applies no price discount at all.
7. Set **Exclude Categories** — a searchable, hierarchical picker of your real WooCommerce categories (with subcategories shown indented) — to keep specific categories out of this program.
8. Set **Exclude Products** — a live search by name, SKU, or barcode — to protect individual products even within an otherwise-eligible category.
9. Add an internal note if useful (e.g. "Requires valid employee ID at checkout") — this is never shown to the customer.
10. Click **Save Discount Programs**.

Drag the ⠿ handle on any program card to reorder the list. Click Delete to remove a program (with a confirmation prompt).

> **Assigning a program to a customer:** open the customer's record and select their Discount Program from there — see Section 6.

20. Settings — Titles & Certs

Titles

A single title shown right next to a customer's name — e.g. "VIP", "Instructor", "Staff". Click **+ New Title**, name it, and save. Drag the ⠿ handle to reorder, and click the delete icon to remove one.

Certifications

Certifications are multi-select — a customer can hold several at once (e.g. "NAUI Open Water", "Advanced Open Water", "Rescue Diver"). Click **+ New Certification**, name it, and save. These feed directly into Class Roster's Cert Type field (Section 13).

Bulk Manage Customer Titles & Certifications

For updating many customers at once:

1. Click **Download Customers (CSV)** to export every customer's current title/certifications.
2. Or click **Download Template (CSV)** for a blank starting point.
3. Edit the spreadsheet — the `title` and `certifications` columns match by exact name (not case-sensitive). List several certifications separated by semicolons, each optionally with a date: `NAUI Open Water:2024-01-15;Rescue Diver`. A blank cell leaves that field unchanged; use `(none)` to clear a title or all certifications.
4. Click **Choose CSV to Upload**, select your edited file, then **Upload & Apply**.

After import, a results panel reports how many customers were updated, any skipped rows (with reasons), and any warnings.

21. Settings — Payments

Step 1: Choose Your Card Payment Gateway

Go to **Settings → Payments**. The first field asks **How do you collect card payments?** — a dropdown with three options:

Option	What it means
— Not set up yet —	No card processing configured. Card won't be offered as a payment method at checkout.
GoDaddy Payments	No connected terminal — the cashier runs the charge separately on the GoDaddy Commerce App (Android/iOS) and records which method was used afterward. The POS still logs the full sale in WooCommerce as normal; it just doesn't process the charge itself.
Stripe Terminal	A genuinely connected card reader that charges directly from the POS.

Step 2a: If You Chose GoDaddy Payments

Nothing further to configure here — an information box explains the workflow: the cashier installs the GoDaddy Commerce App on a separate phone or tablet, enters the total there, and records the result (Credit/Debit) back in the POS once GoDaddy confirms the charge went through.

Step 2b: If You Chose Stripe Terminal

1. Paste your **Stripe Secret Key** into the field — get this from your Stripe Dashboard under Developers → API keys. It starts with `sk_live_` (real payments) or `sk_test_` (testing). This key is used server-side only and is never sent to the browser.
2. Choose your **Terminal Type** from the dropdown: WisePOS E, Stripe Reader S700, BBPOS Chipper 2X BT (no screen), BBPOS WisePad 3 (no screen), or Other/Simulated Reader.
3. Click **Load Readers** — this becomes clickable only once a secret key is entered. The POS contacts Stripe and populates the **Card Reader** dropdown with every reader registered to your Stripe account.
4. Select your specific reader from that dropdown.

What to expect: readers with a screen (WisePOS E, S700) will show the cart summary pushed to their display right before you charge a customer, so they can see the total on the reader itself. Readers without a screen (Chipper 2X, WisePad 3) process charges exactly the same way — they just can't display anything, so the customer will need to see the total on your POS screen instead.

Step 3: Per-Register Gateway Overrides (Optional)

This section only appears once you've configured more than one register under Settings → General (Section 24). Use it when one specific register has genuinely different hardware — for example, a Stripe reader at the front counter but GoDaddy at a rental desk.

1. Click **+ Add Register Override**.
2. Pick which register this override applies to from the dropdown.
3. Pick its gateway (No card processing, GoDaddy Payments, or Stripe Terminal).
4. If you chose Stripe, enter that register's own Secret Key and Reader ID in the two fields that appear.
5. Click **Remove** on an override row to delete it — that register then falls back to the default Payment Gateway settings from Step 1.

Step 4: PayPal & Venmo (via Braintree)

Both payment types are processed through Braintree, PayPal's payment platform for businesses — Venmo no longer offers direct API access to new merchants on its own, so it rides on the same Braintree connection.

1. Log into your Braintree account and go to Settings → API Keys to find the values for the next three fields.
2. Set **Environment** to Sandbox (for testing with fake transactions) or Production (real payments) — always start in Sandbox to confirm everything works before flipping to Production.
3. Enter your **Merchant ID**, **Public Key**, and **Private Key** exactly as shown in Braintree.
4. Check **Enable PayPal Payments** to offer PayPal at checkout.
5. Check **Enable Venmo Payments** to offer Venmo at checkout.

> **Before enabling Venmo:** it requires a US business entity and Braintree's specific Venmo approval — log into your Braintree dashboard and check Settings → Processing to confirm Venmo is actually enabled there first. Checking the box here without that approval in place won't make Venmo work.

Step 5: Save

Click **Save Payment Settings** at the bottom of this tab, or **Save All Settings** at the very top of the Settings window (this saves every tab at once, not just Payments). Changes take effect immediately — no restart or page reload needed.

22. Settings — Labels & Printers

Step 1: Set Up Your Receipt Printer

1. Go to **Settings → Labels & Printers**.
2. Under **Receipt Printer & Layout**, open the **Receipt Printer** dropdown and choose the option matching your hardware: **Browser Print (Generic)** works for most standard printers through your browser's normal print dialog; **Epson ESC/POS (TM Series)** and **Star TSP100 (WebPRNT)** are for those specific receipt printer brands; **Custom** is for anything else.
3. If you chose **Custom**: type the exact printer name into the field that appears, or click **Search** to have the POS look for connected printers and list common ones as clickable buttons below the field — click any of them to fill the field in automatically instead of typing it by hand.
4. Set **Receipt Width** to match your paper: 58mm and 80mm are the two common thermal roll widths (check your printer or roll packaging if unsure), or Letter for a full-size printer.
5. Set **Receipt Font Size** — Small, Medium (the default), or Large.

> **All of these options print through your browser's print window.** None of the four choices above — including Epson and Star — actually select a printer or skip your browser's print dialog; they only change how the receipt itself is formatted. The print window still opens every time, and you (or whoever's at the register) still pick the printer there, exactly like printing any other web page. To print straight to the receipt printer with no window popping up at all: (1) in that print window, pick your receipt printer as the Destination once, and (2) launch Chrome with the `--kiosk-printing` command-line option (a separate Chrome shortcut dedicated to the POS works well for this) — this sends every print job straight to the last-used printer with no dialog at all.

Step 2: Brand Your Receipts

1. **Receipt Logo** — paste an image URL; a live preview appears right below the field once it loads so you can confirm it's correct before saving.
2. **Store Address**, **Store Phone**, and **Custom Header Line** — fill in whichever of these you want printed at the top of every receipt (e.g. a website address or social handle in the Custom Header Line).
3. **Receipt Footer** — a free-text box for a thank-you message, return policy, or anything else you want printed at the bottom.

Step 3: Choose Which Receipt Elements Actually Print

Each of the following is its own independent checkbox — filling in a field above doesn't print it unless its matching checkbox here is also on:

- Show logo on receipts
- Show address in header
- Show phone in header
- Show custom header line
- Show footer message
- Auto-print receipt after checkout — turn this on if you want receipts to print automatically the moment a sale completes, with no extra click

Step 4: Per-Register Printer Overrides (Optional)

This section only appears once you have more than one register configured (Section 24).

> **Understand this before configuring it:** printing always goes through whatever printer is physically connected to the computer or device running the POS at that register — the POS does not send print jobs over the network to a specific register from somewhere else. So this section is only useful when one specific register has genuinely different printer hardware than the rest (for example, a 58mm printer at a small rental desk versus an 80mm printer at your main counter) and needs its own width/font settings to print correctly. If every register uses the same printer setup, skip this section entirely.

1. Click **+ Add Register Override**.
2. Choose which register this applies to, and set its own Receipt Width and Font Size.
3. Click **Remove** on a row to delete that override.

Step 5: Set Up Your Label Printer

1. Open the **Label Printer** dropdown: System Default, Zebra Label Printer, DYMO LabelWriter, Brother QL Series, Rollo Thermal Printer, or Custom.
2. If you're using a Rollo printer specifically, click **Rollo Printer Setup Guide** for a dedicated walkthrough of that hardware's particular setup quirks.
3. Set **Paper / Label Size** — Letter Sheet (8.5"×11", for laser/inkjet sheet labels) or Custom, where you enter your exact label dimensions.
4. Under **Label Feed Type** (Sheet Labels), set **Labels per Row**, **Width**, **Height**, and **Font Size** to match the specific label stock you've loaded.

Step 6: Choose What Prints on Each Label

1. Set **Label Barcode Type**: Code 128 (recommended for general use), Code 39, EAN-13, UPC-A, or QR Code (left- or right-aligned on the label).
2. Under **Content Order**, drag the available fields — store name, product name, SKU, price, barcode, and date — into the order you want them to appear on the printed label. This exact order is what a cashier will see previewed when they print a label from a product tile (Section 3) or from the Print Labels tool.

Step 7: Set Your Receipt Barcode (Independent Setting)

This is separate from the label barcode type in Step 6 — it controls whether, and how, a barcode prints on the customer's paper receipt itself: None, Code 128 (recommended), Code 39, or QR Code.

Step 8: Configure the Cash Drawer

1. Set the **Cash Drawer Printer** — most receipt printers can trigger a cash drawer to pop open using standard ESC/POS commands, so this is very often the exact same device you configured in Step 1.
2. Check **Open drawer on checkout** if you want the drawer to pop open automatically every time a cash sale completes.
3. Check **Open drawer when "No Sale" button clicked** to allow opening the drawer without a sale (this also requires the cashier to have the No Sale permission — Section 17).

23. Settings — Reports (Custom Report Builder)

This is where you build the named, filtered reports that appear in the Reports window sidebar (Section 14) alongside "All Orders."

1. **Go to Settings → Reports (this also triggers loading of report metadata like categories and brands, if not already cached).**
2. **Click + Create New Report and name it (e.g. "Wetsuits (Brand: Bare)").**
3. **Choose one or more filters:**
   - **POS Categories — your configured POS category/subcategory structure**
   - **WooCommerce Categories — the full parent → child category hierarchy from WooCommerce itself**
   - **Brands — if your store uses a brand taxonomy**
   - **Products by SKU — a live search by name, SKU, or barcode, for a report scoped to specific products**
4. **Click Save Settings. The report now appears as its own entry in the Reports window sidebar.**
5. **Drag any report card here up or down to change its order in the Reports sidebar.**

> **Combining filters:** **filter types combine with AND logic — e.g. "WC Category: Wetsuits" AND "Brand: Bare" only shows orders containing Bare-branded wetsuit products.**

> **Not sure what a summary card counts?** **every summary card in the Reports window (Section 14) carries a hover tooltip spelling out its exact formula — for example, "Discounts" sums each order's discount amount and explicitly excludes rewards or store credit, which are tracked as their own separate figures.**

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24. Settings — General

Go to Settings → General. This is the largest settings tab — it covers tax, the customer-facing display, price adjustments, payment-type fees, keyboard shortcuts, the gift card trigger, registers, guest checkout, and backup/restore. Each part below is independent — you don't need to configure them in order, and most stores will only need a handful of these.

Tax

1. Enter your **Tax Rate (%)** — this flat rate is applied to the cart at checkout.
2. Check **Use WooCommerce Tax Settings** if you want the POS to respect each product's individual tax status and tax class as already configured in WooCommerce (some products taxable, others not) — when this is on, the flat rate above still applies on top, but only to the products WooCommerce marks as taxable.

Customer-Facing Display

This opens a second, read-only window showing the customer their own cart — items, subtotal, tax, total, and any discount, rewards, or gift card applied — meant to be dragged onto a second monitor facing the customer. It updates instantly as the cart changes and needs no separate login.

Once enabled, a 🖥 **Close Customer Display** button appears in the header, next to Show Product to Customer (Section 2) if that's also showing. Since the display is turned to face the customer, there's usually no title bar or close button on it you can physically reach from where you're standing — this button closes it from your own screen instead. It's grayed out whenever nothing is currently open, so there's nothing confusing about it working one moment and appearing to do nothing the next.

1. Check **Enable Customer-Facing Display**. Once this is on, the display window opens automatically every single time the POS loads from then on — you don't manually reopen it each shift.
2. Fill in **Customer Display Logo**, **Store Address / Phone / Custom Header Line**, and a **Footer / Personal Note** — these are the same style of branding fields as the printed receipt (Section 22), just shown on-screen to the customer instead of printed.
3. Use the individual checkboxes — Show logo, Show store name, Show address, Show phone, Show custom header line, Show footer message — to control exactly which of the fields above actually display.

> **Browser requirement:** Customer-Facing Display requires a recent Chrome or Edge browser, since it relies on the Document Picture-in-Picture API — it will not work in Safari or Firefox.

> **What to expect if the display gets closed by accident:** since it's supposed to always be open once enabled, the main POS screen will keep showing a reminder banner whenever it detects the display isn't currently open — for any reason, including a browser restart or someone closing it by mistake. That reminder has no dismiss button on purpose; the only way to clear it is to actually reopen the display (click the button that appears in its place) or turn Enable Customer-Facing Display off entirely. The POS now checks once a second whether the display window is still genuinely there, so this banner reliably appears the moment it notices — a fix for an older issue where the header could keep acting like the display was open (no reminder banner at all) even though the actual window was already gone, for example after a crash or the operating system closing it in a way the POS didn't catch.

> **Why the display can't just silently reopen itself after a refresh or a fresh login:** browsers only allow this kind of Picture-in-Picture window to be opened by a real click, never automatically as the page loads — so after refreshing the POS or logging back in, the display genuinely needs that one click on the "Reopen Now" banner; it isn't a bug. If you'd rather it reappear with no click at all, switch to Regular Window mode below and allow pop-ups for your site once in your browser's site settings — a browser told to always allow pop-ups from a site will reopen one automatically, which gets closest to a fully automatic reopen.

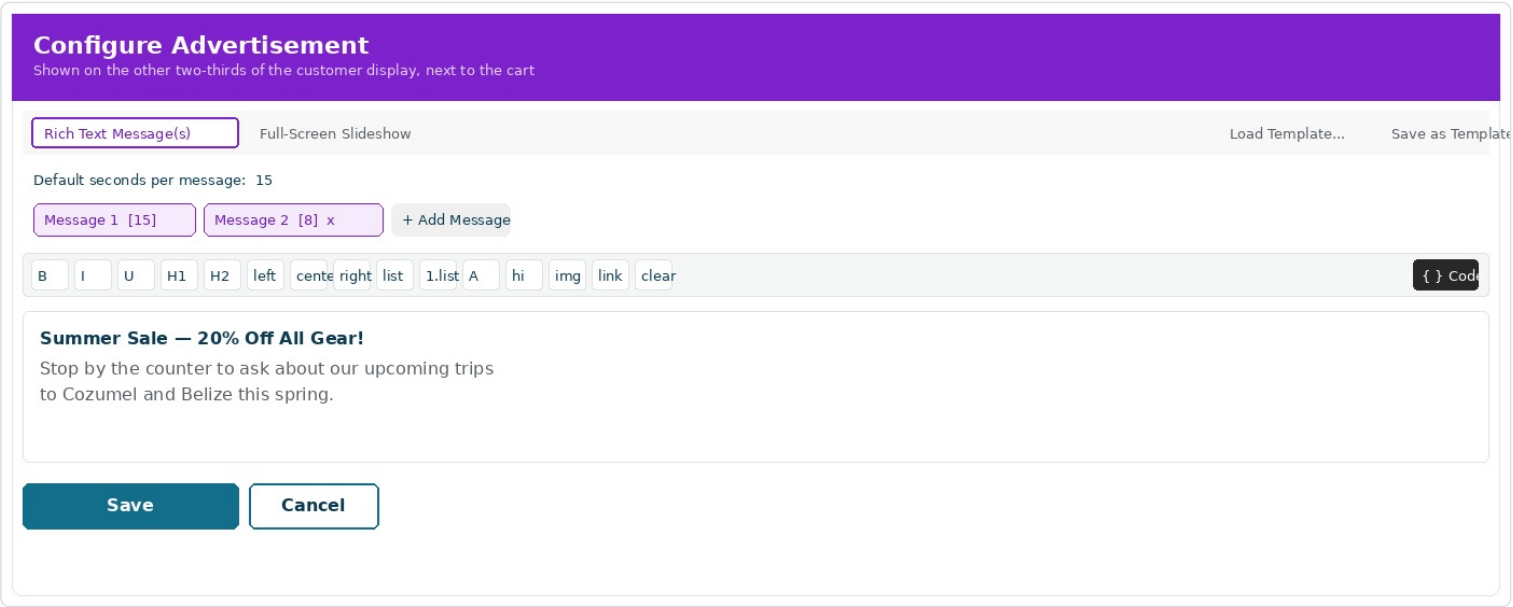
Customer Display Window Mode

Check **Open as a regular window instead of a floating overlay** to change how the Customer-Facing Display actually opens:

Mode	What it is
Floating overlay (default, unchecked)	Quick to reopen, but the browser caps it well short of true full-screen — fine for a small screen or a quick glance, but not for filling a real second monitor.
Regular window (checked)	Opens as a normal, separate browser window — drag it onto your second monitor, then maximize it or use the Full Screen button that appears inside it. This is what actually fills a monitor edge-to-edge.

> **Turn this on if you enable Advertisement Display below:** the split-screen ad layout is designed to fill a real monitor, and the floating overlay mode is too small to show it properly.

Advertisement Display



Configure Advertisement — Rich Text Messages or a Full-Screen Slideshow, with save/load templates.

Once Customer-Facing Display is enabled, a purple **Enable Advertisement Display** checkbox appears beneath it. This splits the customer's screen in two: the cart takes up one third, and the remaining two-thirds shows a rotating slideshow or message you configure — a good way to put a spare second monitor to use promoting trips, sales, or seasonal messages instead of leaving blank space next to the cart.

1. Check **Enable Advertisement Display**.
2. Choose **Cart position**: Left or Right — which side of the screen the cart itself sits on, with the ad content filling the rest.
3. Click **Configure Advertisement** to open the configuration window.

Rich Text Message(s) Tab

A single message just stays on screen continuously. Add more than one and they rotate automatically, each for its own length of time — handy for cycling between a couple of promos, or slipping a holiday message in alongside your usual one.

1. Set **Default seconds per message** — how long each message shows before rotating to the next, unless overridden individually.
2. Click **+ Add Message** for each additional message you want in the rotation; click a message's tab to select and edit it, and set its own duration in the small box next to its name if it should differ from the default.
3. Write the message using the rich text editor: Bold/Italic/Underline/Strikethrough, Heading 1/Heading 2/Paragraph, alignment, bullet or numbered lists, text color and highlight color, an Image button, and a Link button (links always open in a new tab automatically, so the display itself is never navigated away).
4. Click **{ } Code** to switch to raw HTML source editing if you need finer control than the visual toolbar gives you, or **Visual** to switch back.

Full-Screen Slideshow Tab

Loop through one or more full-screen images instead of a text message.

> **Images are never cropped:** a slide's image is scaled to fit entirely within the display, adding letterbox bars on whichever sides need it if its proportions don't exactly match the screen — never cutting off part of the image to fill the space completely.

1. Set **Default seconds per slide**.
2. Click **+ Add Slide**, then click the image area to open the Media Library picker (below) and choose or upload an image for that slide.
3. Optionally set that slide's own duration (overriding the default) and a **Caption** — the caption field is a rich text editor, the same as Rich Text Messages above, so you can bold, italicize, underline, color, or highlight individual words or phrases within it rather than being stuck with one plain, uniform line (e.g. typing "Sale ends Sunday" and coloring just the word "Sale" red). It shows on the live Customer-Facing Display exactly as styled here.
4. Use the ↑ / ↓ buttons to reorder slides, or the trash icon to remove one.

> **Older captions are untouched until you edit them:** a caption saved before rich-text captions were added keeps displaying exactly as plain text as it always did — it isn't automatically reformatted, so there's nothing to redo unless you actually want to add styling to it.

The Media Library Picker

Both the rich text Image button and the Slideshow's image selector open the same picker, with two tabs:

- **Media Library** — browse your existing WordPress media, with a search box and (if the FileBird plugin is installed) an **All Folders** dropdown to filter by folder. Click any thumbnail to use it. Click **Load More** if what you're after isn't in the first batch shown.
- **Upload New** — upload a brand new image directly, optionally straight into a specific FileBird folder if you have one selected

This replaced typing or pasting a raw image URL — you can still reuse any image already in your Media Library instead of re-uploading it each time.

Named Templates

Save a complete Advertisement Display configuration — content mode, every message or slide, and all durations — as a named template you can reuse later or switch between:

- **Save as Template** — prompts for a name and saves the current configuration exactly as it stands
- **Load Template…** — loads a saved template's content back into the editor for you to review or tweak. Loading does not go live by itself — click **Save** at the bottom of the window afterward to actually apply it.
- The small trash dropdown next to Load Template deletes a saved template permanently (with a confirmation prompt) — this only removes the saved template, not whatever is currently configured live.

> **Rotate 90° is hidden when Advertisement Display is on:** the sideways/portrait rotation option (for a monitor mounted on its side) only appears when Advertisement Display is off — the split-screen ad layout is designed for a normal landscape monitor.

Show Product to Customer

Once both Customer-Facing Display and Advertisement Display are enabled, a 🖼 **Show Product to Customer** button appears in the header, next to the register/drawer indicator (Section 2). Use it to put a specific product's photos and details in front of a customer without handing over your phone or walking them to a shelf:

1. Click 🖼 **Show Product to Customer** and search by product name, SKU, or barcode (at least 2 characters).
2. Select a result. It appears right on your own screen, just below the cart's search bar — full photo, name, price (with sale price and strikethrough if it's on sale), SKU, and expandable Description/Short Description sections — and at the same moment replaces the ad slideshow on the Customer-Facing Display with the same photo.
3. Use the ‹ › arrows to scroll through the product's other photos. The customer's screen advances through the same photos in step with yours — both sides are reading the same live selection, not two separate copies, so there's nothing to keep in sync manually. If you selected a specific variation that has no gallery photos of its own, its parent product's photos are shown instead rather than leaving the panel empty.
4. The header button relabels itself to 🖼 **Showing: [product name]** (and turns green) while a product is active, so it's obvious at a glance that the customer display isn't currently showing the ad rotation.
5. Click × **Stop Showing** to clear the selection — the customer's screen returns to the regular ad slideshow, and the header button reverts to its normal label.

> **Why the button only sometimes appears:** it needs a Customer-Facing Display to actually show something on, and the Advertisement Display's ad pane to put that product photo into — with either one off, there'd be nothing useful for it to do, so it's hidden entirely rather than showing and failing when clicked.

Price Adjustments

1. Check **Enable Price Adjustments** to turn on the feature described in Section 5 — refunding part of an item's price without marking it returned or touching stock.
2. This checkbox alone doesn't give anyone access to it: go to **Settings → Users**, open the specific user who should be allowed to issue price adjustments, and check their individual **Price Adjustments** permission (Section 17).

Payment Type Discounts / Fees

Use this to automatically apply a discount or add a fee based on which payment method a customer uses — for example, 3% off for Cash, or a 2.5% fee specifically for Visa.

1. Click **+ Add Rule**.
2. Choose the **Payment Method** this rule applies to: Cash, Credit Card (any/generic), Debit Card, Visa, Mastercard, American Express, Discover, PayPal, Venmo, Check, or Other.
3. Choose **Type**: Discount or Fee, and enter the percentage.
4. If you chose **Fee**: optionally check **Non-refundable on returns** so the fee is kept by the store even if that sale is later returned.
5. If you chose **Discount**: optionally exclude specific SKUs from it, and choose whether it stacks with other discounts already on the order or is skipped automatically if one is already applied.
6. Repeat for as many payment methods as you want to configure — there's no limit to the number of rules.

Keyboard Shortcuts

1. Check **Enable Keyboard Shortcuts** to turn on the three hotkeys below.
2. For each one — Open Cash Drawer, Save Quote, Open Payment — click **Test** to simulate the keypress right now and confirm it does what you expect, or click **Change** and then press whatever key combination you actually want to use instead (press Esc to cancel out of capture mode without changing anything).

Shortcut	Default Key	Action
Open Cash Drawer	F8	Pops the drawer open immediately for a quick physical release — not the full counting tool used to Open/Close a drawer for shift tracking (Section 14). Requires the No Sale permission.
Save Quote	F9	Saves the current cart as a quote
Open	F10	Jumps straight to the payment screen

What to expect: shortcuts are automatically ignored while typing in most fields (customer name, notes, quantity boxes), so typing a literal letter or number there works normally. The one deliberate exception is the main product search box, which stays shortcut-aware even while focused, so a barcode scanner can keep working without interruption.

> **If a key doesn't respond:** your keyboard or Windows may be intercepting it before the browser ever sees it — this is especially common with F8–F12, which often double as media/display or volume keys on laptops. Try Change and pick a plain letter or number key instead, which tends to be far more reliable.

Gift Card Subcategory Trigger

1. Check **Enable gift card popup trigger**.
2. Select the **Category** from the dropdown that appears.
3. Select the specific **Subcategory** within it.
4. Once both are set, a confirmation message names exactly which tab is now wired up (e.g. "Clicking 'Gift Cards' under 'Store Credit' will open the Gift Card creation popup").

What to expect afterward: on the main POS screen, clicking that specific subcategory tab no longer shows a product grid at all — it opens the gift card creation popup directly instead (Section 4). This replaces an older approach that required literally naming a subcategory "GiftCards" to trigger the same behavior.

Registers / Drawer Names

1. Type a name for your register (e.g. "Front Register", "Rental Desk") into the field.
2. Press Enter, or click **+ Add**.
3. Repeat for every physical register or till you run.
4. Click the delete control on a row to remove a register name (only available once you have more than one, since you always need at least one register defined).

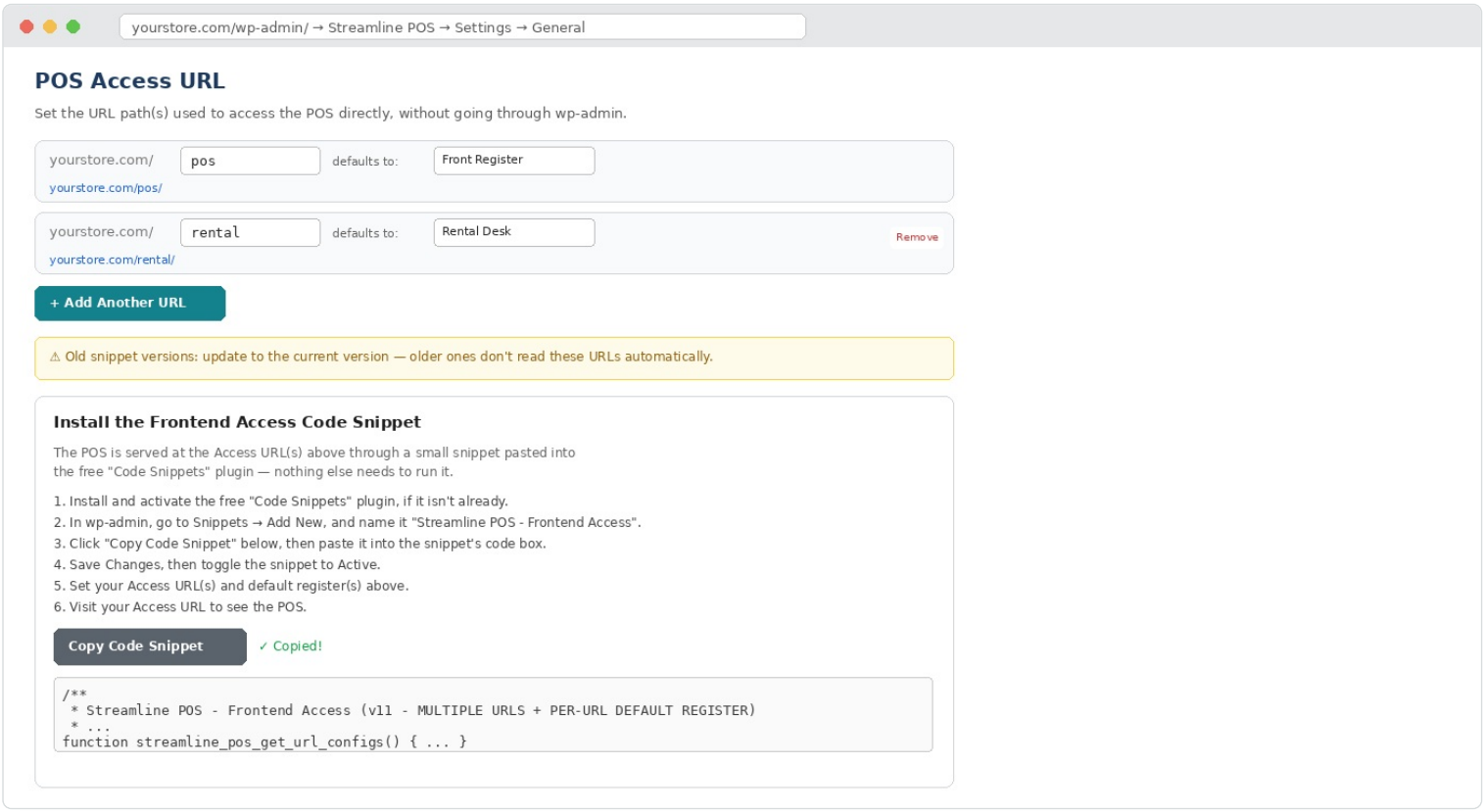
What to expect once you have two or more: a register switcher appears in the main screen header (Section 2), cash drawer activity is tracked separately per register, and Payment Gateway overrides (Section 21) and Printer overrides (Section 22) both become available, each keyed to the exact names you enter here.

🔗 POS Access URL

Set the URL path(s) used to access the POS without going through wp-admin — staff visit a URL directly to open the register, and if you have more than one register, each URL can open straight into its own register automatically. This is the setup half of the Frontend Access feature; Section 27 covers in depth how it actually works under the hood and how to troubleshoot it.

1. Each configured URL shows as its own row: the slug (editable — letters, numbers, hyphens, and underscores only), and — if you have more than one register name set up above — a 🖥 **defaults to:** dropdown to pick which register that specific URL should open into.
2. A live link under each row shows the exact full URL that entry resolves to, so you can click straight through and test it.
3. Click **+ Add Another URL** to add more — useful for a shop with a front counter and a separate rental desk, each getting its own URL that opens straight into the right register.
4. Click **Remove** on a row to delete that URL (only shown once you have more than one).

> **Old snippet versions:** if your site is still running a pre-v11 version of the Frontend Access snippet, update it first — older versions don't read these URLs from settings automatically, so multi-URL and per-register defaults won't work until it's updated (Section 27).



Settings → General → POS Access URL, with the Install the Frontend Access Code Snippet card below it.

Install the Frontend Access Code Snippet

New in 4.93.8 — the snippet's code is now copyable right here, with no separate reference document needed to set it up.

The POS is served at the Access URL(s) above through a small snippet pasted into the free "Code Snippets" plugin — nothing else needs to run it.

1. Install and activate the free **Code Snippets** plugin, if it isn't already (Plugins → Add New → search "Code Snippets").
2. In wp-admin, go to **Snippets → Add New**, and name it "Streamline POS - Frontend Access".
3. Click **Copy Code Snippet** below, then paste it into the snippet's code box.
4. Click **Save Changes**, then toggle the snippet to **Active**.
5. Set your Access URL(s) and, if you have more than one register, each URL's default register, right here in this General tab (above).
6. Visit your Access URL (above) to see the POS — no Permalinks flush needed.

Click **Copy Code Snippet** to copy the current snippet code to your clipboard (a brief "Copied!" confirms it), or review it directly in the read-only box beneath the button.

> **"frontend-access-snippet.txt was not found in the plugin folder":** this message replaces the Copy button and code box if the POS plugin's own copy of the snippet file is missing from its plugin folder — reinstalling the SL POS plugin restores it. It does not mean anything is wrong with a snippet you've already installed and activated.

Guest Checkout Settings

These fields set the shared identity used whenever a sale is rung up without selecting a specific customer: Name (defaults to "Guest Customer"), Email (defaults to "guest@store.com"), Address, City, State, and Zip. Fill these in once — every guest sale from then on uses these same defaults.

Backup & Restore

1. Click **Download Backup** to save your current Settings, Categories, and Appearance configuration to a JSON file on your computer.
2. To restore a previous backup, click **Restore Backup** and choose a previously downloaded file.

> **What's included:** this backup covers Settings, Categories, and Appearance only. It does **not** include Products, Customers, or Orders — those live in WooCommerce and are covered by your regular WordPress/WooCommerce backup routine, not this button.

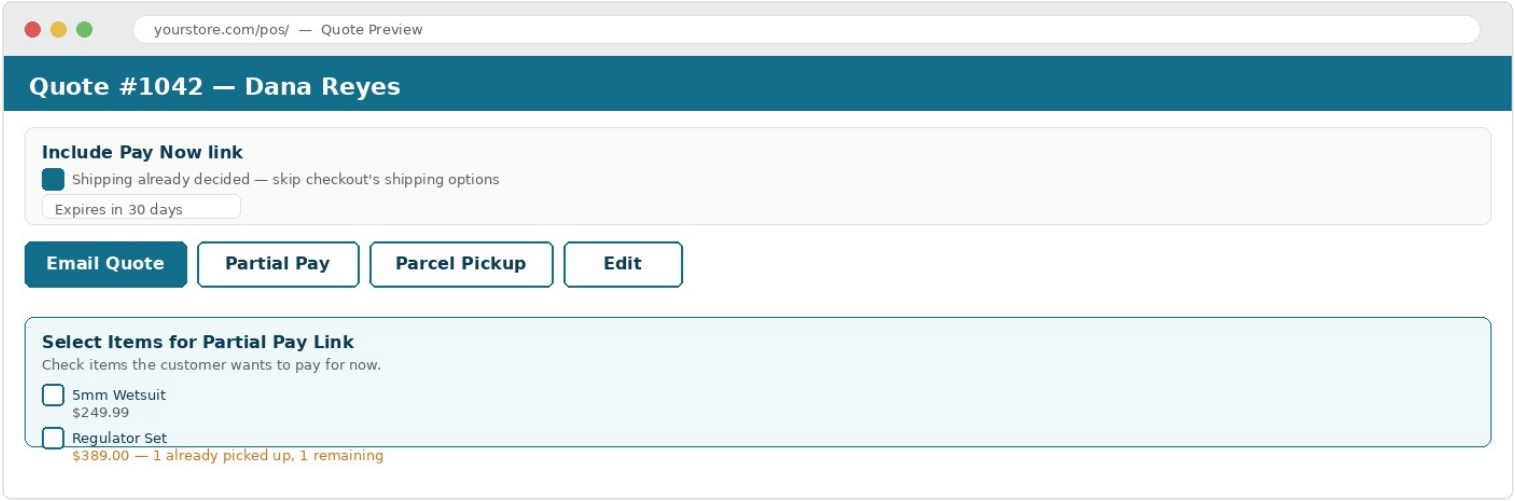
25. Quotes, Quote Template & Repairs Template

> **Why branding matters here more than it sounds: both the Quote Template and the Repairs Template aren't just cosmetic letterhead. Quote emails and repair status emails can each include a real, clickable Pay Now link that takes the customer straight to your store's checkout to actually pay the quoted or repaired amount online, through whatever payment gateway is already active on your site. The Header Background Color and Accent Color you set below are the actual colors used on that payment button the customer sees and clicks — so this isn't decoration, it's the customer-facing look of a real payment request going out under your store's name.**

Step 1: Save a Cart as a Quote

1. Build the cart as normal — add products, adjust quantities, apply any discount that should be included.
2. Click **Save Quote** in the cart panel (or press the Save Quote keyboard shortcut, default F9 — Section 24).
3. The quote is saved with a sequential number, starting from whatever you set in **Quote Numbers Start At** under Settings → General (default 1000), and the cart clears so you can move on to the next customer.

Step 2: Email a Quote — With or Without a Pay Now Link



The quote preview screen — Pay Now options, plus Partial Pay and Parcel Pickup.

1. Open **Saved Quotes** and open the specific quote you want to send.
2. Check **Include Pay Now link** if you want the customer to be able to pay for the whole quote online directly from the email. Leave it unchecked to send a purely informational quote with no payment button at all.
3. If you included a Pay Now link: choose how long it stays valid from the expiration dropdown (7, 10, 30, 45, 60, or 90 days) — after that, the link stops working for the customer.
4. If the quote already has its shipping worked out (including free shipping) as part of the quoted price, check **Shipping already decided — skip checkout's shipping options**, so the customer isn't confusingly offered to choose or pay for shipping again at checkout on top of what you already quoted.
5. Click **Email Quote**. The customer receives a branded HTML email with the quote details (styled using your Quote Template, Step 4) plus a downloadable HTML copy they can save or print themselves.

Step 3: Partial Pay — Charge for Only Some Items

Use this when a customer wants to pay for and pick up only part of a larger quote right now — for example, a special order where some items have arrived and others haven't.

1. From the quote preview, click **Partial Pay**.
2. Check the box next to each item the customer is paying for right now. Items with some quantity already picked up (Step 5) show exactly how many remain, so you don't accidentally charge for something already settled.
3. Click to send — a unique payment link goes out by email covering only the checked items, separate from the full quote total.

Step 4: Brand Your Quote Template

1. Go to **Settings → Quote Template**.
2. Paste a **Logo URL** — this appears at the top of every quote email.
3. Set a **Header Background Color** and an **Accent Color**. Remember: if the quote includes a Pay Now link, the Accent Color is literally the color of the button the customer clicks to pay you, so choose something that reads clearly as a button, not just a decorative highlight.
4. Click **Preview Quote Template** at any point to see exactly how a real quote — including the payment button, if used — will look before any customer actually receives one.

Step 5: Track Multi-Part Pickups with Parcel Pickup

For a quote covering items that will physically leave the store in more than one trip (a special order arriving in batches, for instance), Parcel Pickup keeps a running record of exactly what's gone out so far and what's still owed.

1. From the quote preview, click **Parcel Pickup**.
2. Any items already picked up on a previous visit are summarized at the top, with the date and quantity.
3. Select the items (and quantities) the customer is taking with them on this visit.
4. Click **Record Parcel Pickup & Load Cart** — this logs the pickup against the quote and loads just those items into the cart so you can charge for them immediately.

> **Once any pickup has been recorded on a quote,** the ordinary "Load" button (which loads the entire quote into the cart at once) is disabled for that quote — you'll use Parcel Pickup from then on to charge for each remaining batch individually, so nothing already picked up and paid for gets accidentally charged again.

Step 6: Clean Up Old Quotes

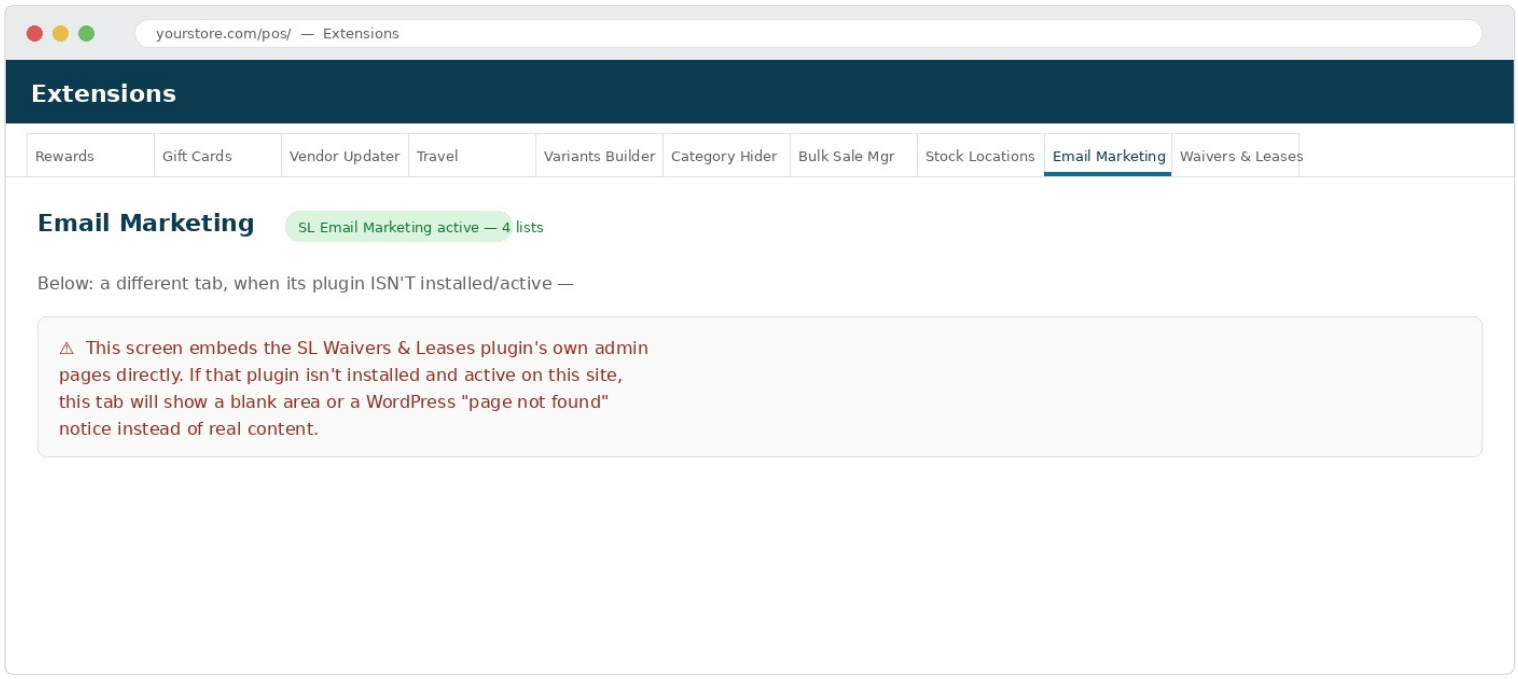
1. Click **Delete Old Quotes**.
2. By default this removes old quotes that were never converted into a sale.
3. Check **Include Paid Quotes** first if you also want to clear out quotes that eventually did become a completed sale — otherwise those are left alone.

Step 7: Brand Your Repairs Template (Optional)

This settings tab only appears once Repairs & Work Orders is enabled — a feature built directly into POS itself, not a separate plugin (Section 12). It controls the branding of the status-update emails sent by the "Notify Customer" button on a work order, which can carry their own Pay Now link once a repair is ready and billable.

1. Go to **Settings → Repairs Template**.
2. Set **Logo URL** and **Header Background Color** the same way as the Quote Template above.
3. Set a **Header Badge Label** — a short status badge shown in the email header (e.g. "Repair Update").
4. Set an **Accent Color** — same as with quotes, this colors both the status text and the actual "Pay Now" button/link in the email, if the repair is billed and ready for the customer to pay online.
5. Click **Preview Repairs Template** to check the branded email — payment button included — before it's used on a real work order.

26. Extensions — How POS Connects to Your Other SL Plugins



The Extensions panel — each tab embeds that plugin's own admin screens directly inside POS.

Step-by-Step: Opening and Using an Extension

1. Click **Extensions** in the POS header (only visible if your account has the Manage Extensions permission — Section 17).
2. A row of tabs appears across the top of the panel — one per integrated plugin your account has been given access to (see the full list below).
3. Click a tab, e.g. **Rewards**. What loads inside is literally that plugin's own admin screen, running inside this panel — the same screen you'd see if you went to that plugin's page in the regular WordPress admin.
4. If that tab shows real content (a dashboard, a settings form, a list of customers), the corresponding plugin is active and everything is working correctly.
5. If that tab instead shows a blank area or a WordPress "page not found" message, the corresponding plugin is not installed or not active on this site — see the warning below before assuming anything is broken in POS itself.
6. Drag any tab left or right in the panel header to reorder them to your liking — the new order is remembered.

> **This is the single most important thing to understand about Extensions:** every tab in this panel is a live view into a *separate SL plugin's own admin pages* (technically, most are embedded as an iframe pointing at that plugin's WordPress admin screen). A tab only works if the corresponding plugin is actually installed and active on this WordPress site. Granting a user permission to an extension tab controls whether *they can see it* — it does not install or activate anything. If the underlying plugin isn't active, that tab will either show a WordPress "page not found" screen, a blank area, or — for the two tabs that check first (Email Marketing and, quietly, Waivers & Leases — see below) — a clear status indicator or simply no data, instead of real content. The one exception is the 🏷 Coupons tab: it's the same iframe approach, but it embeds WooCommerce's own built-in coupon screens rather than another SL plugin's, so it only needs WooCommerce's coupon feature turned on, not a separate plugin.

The Full List of Integrated Plugins

Extension Tab	Requires this SL plugin active
Rewards	SL Rewards
Gift Cards	SL Gift Cards & Store Credits
🏷 Coupons	WooCommerce's own coupon system (Settings → General → "Enable the use of coupon codes") — no separate SL plugin required
Vendor Updater	SL Vendor Price & Image Updater
Travel	SL Travel Booking Manager
Variants Builder	SL Variants Builder
Category Hider	SL Category Hider
Bulk Sale Manager	SL WooCommerce Bulk Sale Manager
Stock Locations	SL Inventory & Stock Location Management
Email Marketing	SL Email Marketing

Waivers & Leases	SL Waivers & Leases

Three POS features are not in this list, on purpose: Equipment Rental (Section 11), Repairs & Work Orders (Section 12), and Registration Info & Class Roster (Section 13) are all built directly into Streamline POS itself — none of them are separate plugins. They live on the main POS screen and in the regular Settings tabs like any other core POS feature, so they never appear as Extensions tabs and never depend on anything else being installed.

For how to actually use a plugin once its tab is open: this section only covers how POS connects to each plugin and who can see it — it isn't a substitute for that plugin's own documentation. Once you're inside an Extensions tab (Rewards, Gift Cards, Travel, and so on), refer to that specific plugin's own user manual for a full walkthrough of every screen, button, and setting inside it.

Step-by-Step: Granting a User Access to an Extension

1. Go to **Settings → Users** and open the specific user.
2. Check **Manage Extensions** if it isn't already — this is the master switch. If off, this user never sees the Extensions button at all, regardless of anything below.
3. Find the specific plugin in the tree that appears below (e.g. "Rewards Plugin:") and click it to expand its own sub-permission checkboxes.
4. Check only the specific tabs or actions this user should be able to use — the exact list of sub-permission checkboxes for every plugin is in the table below.
5. Repeat for any other plugin this user needs.
6. Click **Save All Settings**.

The exact sub-permission checkboxes available per plugin:

Plugin	Sub-permissions
Rewards	Settings, Customers, Reports
Gift Cards & Store Credits	Dashboard, Gift Cards, Create Card, Store Credits, Add Credit, Reports, Settings, Import/Export
🏷 Coupons	Access Coupons Tab, All Coupons (view & edit), Add Coupon
Vendor Price & Image Updater	Update Prices, Manage NLA (No Longer Available), Category Corrections, Update Images, Add Placeholders, Barcodes, 🚀 Go-Live Tab (requires SL Vendor Price & Image Updater 1.16.0 or later)
Travel Booking Manager	Dashboard, Overview, Bookings, Add Customer, Add Trip, All Trips, Archive, Cost of Goods, Fix Payments, Manifests, Payments, Reports, Settings
Inventory & Stock Location Management	Locations
Category Hider	Manage
Bulk Sale Manager	Manage
Email Marketing	Dashboard, Campaigns, Group Emailing, Templates, Lists, Subscribers, Reports, Settings
Waivers & Leases	Templates, Add New, Signed Documents, Send for Signature, Kiosk Settings, Reports, Import/Export, Settings, Customer Lookup (see below)
Variants Builder	Create/Edit Variants, Import/Export, Advanced Import

🏷 **Coupons sub-permissions: Access Coupons Tab** is the tab's own master switch — checking it is what makes the Coupons tab appear at all, and it defaults to also turning on All Coupons (view/edit) beneath it. **All Coupons** opens WooCommerce's regular coupon list (view and edit any existing coupon). **Add Coupon** opens WooCommerce's "Add new coupon" screen so this user can create new codes without leaving POS. These three checkboxes only control who can see and manage coupon *codes themselves* in the Extensions panel — every cashier with the ordinary Apply Discounts permission (Section 17) can still type an existing coupon code into the Apply Discount popup at checkout (Section 4b) regardless of whether they have any Coupons tab access at all. As with any newly added sub-permission, existing users all start with these three unticked; new Administrator or Manager users get them checked by default going forward.

🚀 **Go-Live Tab (Vendor Price & Image Updater):** shows SL Vendor Price & Image Updater's own Go-Live tool for scheduling when new products staged in its Go Live category become visible to customers — see that plugin's own manual for how to use it. Existing users all start with this specific permission unchecked, even if they already have every other Vendor Price & Image Updater sub-permission checked — tick it individually for anyone who should see the tab. New Administrator or Manager users get it checked by default going forward, the same as any other newly added extension permission.

A Staff or Cashier could previously get full, un-intended access to an extension section nobody had ever actually touched for their account. If a specific sub-permission checkbox for a plugin had genuinely never been saved one way or the other for a user — most commonly a brand-new sub-permission added by a plugin update, like Go-Live Tab above — a Staff or Cashier account could end up with full access to it despite every checkbox for that plugin appearing unticked in Settings → Users. This is fixed: Staff and Cashier accounts now only get what is actually ticked, nothing more. Administrator and Manager accounts are unaffected and still pick up newly added extension permissions

automatically, as before. If a Staff or Cashier user seems to have lost access to a tab they were legitimately using, that's this fix taking effect correctly — just tick that specific permission for them in User Management.

Two Different Integration Styles

Most tabs above work the same way: they load that plugin's own admin screen inside an iframe, at a URL like `/wp-admin/edit.php?post_type=sl_waiver_tpl&page=sl-waivers-settings&iframe=1`. If that plugin isn't installed, the iframe simply fails to load anything useful.

Two integrations are smarter about this:

- **Email Marketing** shows an explicit status badge right in its Settings tab: a green "SL Email Marketing active — N list(s)" badge if it detects the plugin and lists, or a yellow "SL Email Marketing not detected" badge if it doesn't. This is the clearest, most direct signal in the whole Extensions system — if you ever see the yellow badge, the fix is to install and activate SL Email Marketing, not to change any POS setting.
- **Waivers & Leases → Customer Lookup** (used on the Customer detail panel, Section 6, not inside the Extensions modal itself) checks the SL Waivers REST endpoint directly. If that request comes back 404 (plugin not active), the POS deliberately shows the customer as simply having no documents on file, rather than surfacing a scary error at the register for something a cashier can't fix mid-sale. A different kind of failure — an expired session, or a genuine connection problem — does show a distinct warning, so you can tell "nothing on file" apart from "something's actually broken."

Waivers & Leases' Add New and Send for Signature tabs mirror the same-named pages added directly in SL Waivers & Leases itself — use Add New to build a template and Send for Signature to email someone their own signing link, without leaving the POS. If you use SL Media Folders alongside this, its folder-tree sidebar is deliberately hidden inside these two embedded views, and inside Bulk Change Order Status (Section 7b) — that sidebar assumes WordPress's normal admin bar and menu are present to position itself against, which these iframe views hide, so showing it here would only float over the content instead of helping. It's unaffected in every other embedded view, including the separate folder sidebar inside the media picker.

Practical Guidance

1. Before granting a user access to an extension, confirm the matching SL plugin (see the table above) is actually installed and active on this site — **Plugins** in the WordPress admin menu.
2. If an extension tab looks blank, shows a WordPress error page, or a customer's data you expect to see (rewards, waivers, travel bookings) never appears, that plugin not being active is the first thing to check — well before assuming a bug in POS itself.
3. Sub-permissions only matter once the plugin is active — turning on "Reports" under Rewards for a user does nothing useful if SL Rewards itself isn't installed.
4. Uninstalling or deactivating an SL plugin later doesn't remove its Extensions permission checkboxes from your users — it simply makes that tab non-functional again until the plugin is reactivated.

27. Frontend Access — How the No-Login POS URL Snippet Works

> **"No-login" means no WordPress login — not no login at all. Visiting this URL skips the WordPress dashboard entirely; it does not ask anyone to sign into WordPress first. What loads instead is the POS's own separate login screen, and the cashier signs in there using a POS account — the same accounts you create and manage in Settings → Users and the header's Users button (Section 17). That POS login is the real security gate on this page, completely independent of WordPress usernames and passwords.**

The Frontend Access snippet lets staff open the POS at a clean front-end URL like `/pos/` — a full-screen experience without navigating the WordPress admin dashboard at all. It is installed as a separate code snippet (via the free Code Snippets plugin), not part of the main POS plugin file itself — the current version is v12, and it's also documented in the *Streamline Code Snippets Reference*, Section 7. As of 4.93.8, its code is also copyable directly from inside the POS app itself (Section 24), so a separate reference document is no longer needed just to get the code.

How It Actually Works

The snippet doesn't hard-code a URL anywhere in its own code. Instead, on every page load it:

1. Reads the list of configured URLs directly from the POS's own settings in the database (the `general` row of the `wp_streamline_pos_settings` table) — each entry has a **slug** (e.g. "pos", "register2") and an optional **default register name**.
2. Registers a WordPress rewrite rule for every one of those URLs, so `yoursite.com/pos/` (or however many URLs you've configured) all resolve to the POS app.
3. Compares a hash of the whole URL configuration against what it last flushed — if anything changed (a URL added, removed, or its default register changed), it automatically flushes WordPress's rewrite rules right then. You never need to visit Settings → Permalinks manually.
4. Passes the matched URL's default register straight through to the page it serves, so visiting that specific URL opens directly into that register with no extra step for the cashier.
5. Falls back to a single unnamed `pos` URL automatically if nothing is configured yet, and transparently upgrades any site still using the older single-URL setting from before multiple URLs were supported.

The page it serves is a full HTML shell (loading spinner, Tailwind CSS, then the POS's own React app and styles) that mounts the exact same POS interface you'd get inside wp-admin — just without the WordPress admin chrome around it. It also carries a secure, time-limited iframe auto-login token system, which is what allows the POS to be safely embedded in an iframe elsewhere (such as inside another SL plugin's own admin page) with an already-authenticated session, rather than asking for a second login.

Configuring URLs (in the POS app, not the snippet)

All of the actual configuration happens in **Settings → General → POS Access URL** — the snippet itself never needs editing once the current version is installed. See Section 24 for the full step-by-step on adding, editing, and removing URLs, and on the new **Install the Frontend Access Code Snippet** card described below.

> **Old snippet versions:** if your site is still running a pre-v11 version of the Frontend Access snippet, replace it with the current version first — older versions don't read `posUrls` from settings automatically, so multi-URL and per-register defaults won't work until it's updated.

Installing the Snippet

As of 4.93.8, Settings → General → POS Access URL (Section 24) includes an **Install the Frontend Access Code Snippet** card right there in the POS app, so installing no longer means tracking down the code in a separate reference document:

1. Install and activate the free **Code Snippets** plugin, if it isn't already.
2. In wp-admin, go to **Snippets → Add New**, and name it "Streamline POS - Frontend Access".
3. In the POS app, go to **Settings → General → POS Access URL** and click **Copy Code Snippet**, then paste it into the snippet's code box.
4. Click **Save Changes**, then toggle the snippet to **Active**.
5. Configure your URL(s) as described above, in Settings → General → POS Access URL.

6. Visit the URL(s) you configured — they're live immediately, no Permalinks flush needed.

> **Fixed in v12 — the Copy Code Snippet box could come up empty when viewed from the POS's own front-end URL.** The code box and Copy button described above are part of the same POS app screen whether you reach Settings by signing into wp-admin or by signing into the POS directly at its own front-end URL (this section). Before v12, the front-end-served page built its own separate copy of the data that feeds that screen and didn't include the snippet code in it — so an admin who opened Settings from the front-end URL saw the "frontend-access-snippet.txt was not found in the plugin folder" message even though the same screen worked fine from inside wp-admin and the file was never actually missing. The front-end page now carries that data too, so the Copy Code Snippet card works correctly from either place.

There's no WordPress-level permission gate on this URL at all — no capability check, no redirect to the WordPress login screen. The page loads straight to the POS's own login form for anyone who visits it, and from that point on it's exactly the same login used on the regular wp-admin version of the POS: a username and password from a POS account (Section 17). This is by design — it's what makes the URL usable on a dedicated terminal or tablet that should never need a staff member to sign into WordPress itself, while still requiring a real POS login to actually do anything once the page loads.

Problem	Solution
404 on the POS URL	Confirm the Code Snippets plugin and the Frontend Access snippet are both active, then give it a moment — the snippet auto-flushes rewrite rules on change, and a hard refresh usually resolves it.
The page loads but won't let anyone past the login screen	That's the POS's own login, not a WordPress one — confirm the username and password against a real POS account in Settings → Users (Section 17), not a WordPress account.
Wrong register loads at a given URL	Confirm that URL's "defaults to" register is set correctly under Settings → General → POS Access URL.
New URL doesn't work after adding it	It should go live immediately on save — if it still 404s, hard-refresh; the rewrite-rule flush is automatic but the browser may have cached the old response.
Multiple URLs or per-register defaults not working	You're likely on an old snippet version — update to the current one (v11+), since only it reads posUrls from settings dynamically.
Copy Code Snippet box says the snippet file wasn't found, or shows empty	If this happens only from the front-end POS URL and not from wp-admin, update the Frontend Access snippet to v12+ (this section). If it happens everywhere, reinstall the SL POS plugin — its own bundled copy of the snippet file is missing.

28. Keyboard Shortcuts — Quick Reference

Configured under Settings → General (Section 24) — this table shows the defaults.

Key	Action	Requires
F8	Pop the cash drawer open immediately — a quick physical release, not the full counting tool	No Sale permission
F9	Save current cart as a Quote	Keyboard Shortcuts enabled
F10	Open Payment screen	Keyboard Shortcuts enabled

Not the same as the header's Cash Drawer button: F8 is a fast physical pop with no counting step — use it for a quick peek or to make change without ringing anything up. Clicking Cash Drawer in the header (Section 14) is a different, more deliberate action: it opens the full denomination-counting tool used to formally Open or Close a drawer for shift tracking. Use F8 for a quick in-and-out; use the header button at the actual start and end of a shift.

Barcode scanners: most scanners act as a keyboard and send an Enter keystroke after the scanned code — the main product search box stays focused and shortcut-aware specifically so scanning keeps working without interruption.

29. Troubleshooting & Quick Reference

Issue	What to check
Products not appearing in a POS category	Confirm they're published in WooCommerce, then assign them via Settings → Categories → Assign Products.
A product doesn't show up on the Rental tab	Confirm it's assigned to the WooCommerce category configured as your Main Rental Category, and that Equipment Rental is enabled (Section 11).
A course doesn't show up on Class Roster	Confirm the product is linked to a course entry via the product picker in Settings → Course Roster — being in a category isn't enough for courses, unlike Rental (Section 13).
Course add-ons/cert cards aren't detected automatically	Confirm the course's WooCommerce product is actually set to Product Type: Grouped (or the Smart Grouped Products plugin's format), with those items added as its children — then click Refresh on the course's entry (Section 13).
Receipt printer not working	Allow pop-ups for your site, and enable receipt preview mode (Settings → Labels & Printers) to confirm content before printing.
An Extensions tab is blank, errors, or a customer's plugin-based data never shows	Confirm the matching SL plugin is installed and active (Section 26) — this is by far the most common cause, well before assuming a POS bug.
Frontend /pos/ URL issues	See Section 27 for the full Frontend Access troubleshooting table.
Keyboard shortcut doesn't respond	Try a different key — F-keys are sometimes intercepted by the OS or keyboard firmware before the browser sees them (Section 24/26).
New employee can't log in	Use Send Setup Link from Settings → Users rather than setting a password yourself (Section 17).
A register-specific override (payment gateway or printer) isn't applying	Confirm the cashier actually selected that register name in the header switcher — overrides are keyed to the exact register name.
Not sure whether to Return an item or use Price Adjustment	Return marks stock as coming back and the item as no longer sold; Price Adjustment only refunds money while the customer keeps the product. Both are reachable from the same Return/Refund screen (Section 5).
Rental shows as Reserved when it should be Active (or vice versa)	Check the "Activate rental at checkout" box was set correctly when the rental was created (Section 11) — it can't be changed after the fact from that same form.
Cash Drawer Count entry seems to be missing from Reports	Check for a "saved locally, but could not sync" warning at the time it was recorded (Section 14) — that entry may still only exist on the original device.
A quote or repair's Pay Now link doesn't work for the customer	Check its expiration window hasn't passed (Section 25) — quote links expire after the window chosen when it was sent; repair links use their own configured expiration.

Sell a gift card	Gift Cards category/subcategory → fill in amount & delivery → Create & Add to Cart
Give an employee a standing discount	Settings → Discounts → + New Program → assign it on the customer's record
Build and rent out an equipment product	Products → Add New → assign to rental category → Settings → Rental → Rental tab → add item → set period → check out
Open a repair work order	Repairs & Work Orders tab → new work order → track status → Notify Customer
Send a repair bill the customer can pay online	Work order → Notify Customer → check "Include a Pay Now button"
Build a course and see who's registered	Products → Add New → Settings → Course Roster → link product to a course entry → Class Roster tab
Return part of an order, not all of it	Orders → open order → Return/Refund → set Return Qty per item → Continue to Refund
Count and open/close a drawer for a shift	Header → Cash Drawer → enter denomination counts → Open Drawer (start) or Close Drawer (end)
Build a filtered sales report	Settings → Reports → + Create New Report → choose filters → Save Settings
Grant a user access to another SL plugin from POS	Settings → Users → (user) → Manage Extensions → expand that plugin's sub-permissions
Set up a no-login POS URL	Install Frontend Access snippet → Settings → General → POS Access URL

30. Version History

What's changed in each release of Streamline POS, in plain language — for reference and troubleshooting.

Version	Date	What Changed
4.94.1	Oct 2026	Added: the Reordering Report's vendor header can now back-date the Ordered Date on items still missing their Invoice/PO # or Qty, alongside the existing bulk Invoice/PO # and Qty Ordered fills (Section 8).
4.94.0	Oct 2026	Added: Shop Expenses (Section 9) — a new 🧾 Expenses screen for tracking shop bills and receipts (vendor, tax category, payment type, store department, tax paid, shipping cost, receipt uploads), with CSV import/export, growing/hideable picklists managed in Settings → Expenses (Section 18), a new Expenses report grouped by category/department/vendor/month (Section 14), and a new per-user Manage Expenses permission (Section 17). Ported from SL Property Manager, with a Shipping Cost field and store-Department assignment in place of a property/ownership company. Added to the Reordering Report's vendor header: bulk Invoice/PO # and Qty Ordered fills for checked-Ordered items, a 🧾 Create PO #'s button that auto-generates a PO number, and a 📥 Export Not Ordered button per vendor (Section 8).
4.93.8	Oct 2026	Added: Administrators and Shop Managers already signed into WordPress are now logged into the POS automatically, with no login screen, when their WordPress username or email matches an existing POS user account (Section 1). Added a new "Install the Frontend Access Code Snippet" card to Settings → General → POS Access URL with step-by-step directions and a Copy Code Snippet button, so the snippet code no longer needs to be found in a separate reference document (Section 24). Fixed (Frontend Access snippet v12): that same Copy Code Snippet box could come up empty when viewed from the POS's own front-end URL instead of from wp-admin, even though the snippet file was never actually missing (Section 27).
4.93.5	Oct 2026	Fixed: a fast typist could briefly see search results for an earlier, shorter search instead of what they'd actually finished typing, until deleting and retyping the last character — a late-arriving answer for a broader term could overwrite the correct, more specific results (Section 2). The POS now always discards a stale answer, and shows "Searching..." for the whole wait instead of flashing old results. Applied to every type-ahead search in the POS: main product search, Show Product to Customer, customer search (several contexts), Repairs parts search, and Reordering/category product searches.
4.93.4	Oct 2026	Changed: manual $ /% discounts (Section 4b) are now genuinely controlled by each user's Apply Discounts checkbox and new Discount Options (which type(s), a separate maximum for each, and whether a discount can go below cost) — previously the checkbox had no real effect, Staff could never discount, and Cashiers were always capped at 10%/$10 (Section 17d). Changed: the Apply Discount button is now always shown, since coupons, rewards points, and gift certificates live in the same window regardless of manual-discount access. Changed: Equipment Rental, Repairs & Work Orders, and Class Roster access are now all per-user checkboxes that default to on for everyone, including existing users (Section 17e). Fixed: a discount type a user isn't allowed to use can no longer be selected.
4.93.3	Oct 2026	Fixed: SL Media Folders' folder-tree sidebar could sit on top of the orders list inside Bulk Change Order Status (Section 7b), including after filtering or a bulk action. New: per-user Repairs & Work Orders and Class Roster access checkboxes, matching the existing Equipment Rental one (Section 17e) — both start checked for every existing user.
4.93.2	Oct 2026	Fixed: removing a category in Edit Product (Section 3) didn't stick on sites running a category-hiding plugin such as SL Category Hider — the removed category came back and new ones piled up on top; update SL Category Hider to 1.0.4+ as well if you use it. Fixed: Edit Product no longer touches categories unless you actually changed them, and the save is a single request instead of two. Changed: editing a variation with no categories of its own now shows and saves the parent product's categories, with a note explaining it; variations with their own categories are edited in place.
4.93.1	Oct 2026	Fixed: every return was counted twice in the order's returned-items tally (Section 5) — a return of 1 could show as "Previously returned: 2," with a reprinted return receipt's subtotal/tax/total doubled, and a partial return could block more of the remaining quantity than it should have; the actual refund amount, including any automatic Stripe/Braintree refund, was always correct. Orders affected before this update now read correctly too, with no data changes needed. Added a note under Settings → Labels & Printers explaining that all receipt printer options print through the browser's print window, and how to print straight to the receipt printer with Chrome's --kiosk-printing option (Section 22).
4.93.0	Oct 2026	Added: returns and Price Adjustments on sales paid with the Stripe card reader now automatically refund the customer's card through Stripe the moment the refund is recorded — no trip to the Stripe dashboard (only for reader sales made on 4.93.0+, since that's when the charge ID started being saved). Documented the full Price Adjustment workflow and the new Automatic Refunds behavior for card/PayPal/Venmo refunds, including the split-tender and store-credit proration rules (Section 5). Fixed: a PayPal/Venmo sale refunded partly as store credit was incorrectly also refunding the full amount back to PayPal/Venmo.
4.92.2	Oct 2026	Fixed: the New Online Orders banner (Section 16) never fired for Apple Pay or Google Pay orders, could forget it had already shown an order after a new tab or browser restart, could mark an order seen before it was ever displayed, could miss an order paid after another one was acknowledged, and was limited to the 50 most recent rows on a busy day — all five fixed. Added full documentation of Backorders & Partial Shipments on the Reordering Report (Section 8), including the new "add what's already arrived to stock" prompt and the smarter Received flow when only part of a backordered item has shown up.
4.92.1	Sep 2026	Fixed: double-clicking Complete Payment could create the same sale twice — the button now locks and shows "⏳ Processing..." on the first click (Section 4). Fixed: returning an order with a $0 total (sold 100% off, or paid entirely by gift card/store credit) didn't put the quantity back in stock, and a 100%-off item's return showed a refund of its full price instead of $0.00 — both now correct, and the payment button reads "Complete Refund" for returns (Section 5).
4.92.0	—	Added WooCommerce coupon codes at checkout (Section 4b) and a new 🏷 Coupons tab in Extensions with its own permissions (Section 26).

4.91.2	**—**	**Added the 🚀 Go-Live tab and permission for Vendor Price & Image Updater (Section 26). Fixed: Staff/Cashier accounts could get unintended full access to an extension permission that had never been explicitly configured for them.**
4.91.1	**—**	**Added a "🖥 Close Customer Display" header button for closing the customer-facing screen from your own side (Section 24).**
4.91.0	**—**	**Fixed: the Customer-Facing Display could get "stuck" showing as open when the window was actually gone — now checked every second, with a one-click "Reopen Now" banner. Documented why Picture-in-Picture can't silently reopen after a refresh or login (Section 24).**
4.90.1	**—**	**Fixed: a genuinely on-sale product/variation could be missed by the ON SALE banner and "Show Only Products on Sale" filter when WooCommerce's cached price field was stale (Section 2).**
4.90.0	**—**	**Added "Product Order" (sort) and "Show first" controls for subcategories linked to a WordPress Category, including a Products-on-Sale-only filter (Section 15).**
4.89.0	**—**	**The Customer-Facing Display's slideshow caption became a rich-text editor (bold, italic, underline, color, highlight) instead of plain text (Section 24).**
4.88.0	**—**	**Added "Show Product to Customer" — a header button to push a specific product's photos to the Customer-Facing Display on demand (Section 24).**
4.87.1	**—**	**Fixed: the Settings → Categories "WordPress Category" dropdown now lists subcategories indented under their parent category instead of one flat alphabetical list (Section 15).**
4.87.0	**—**	**Added a "Product Image Display" choice — Fill (crop to fit) or Fit whole image (no cropping) — for product photo thumbnails (Section 16).**
4.86.1	**—**	**Added the ON SALE banner to the Search Results popup. Fixed the new WordPress Category dropdown showing no categories to pick from on first load (Section 2, Section 15).**
4.86.0	**—**	**Added an ON SALE banner across the product grid, cart, and Settings → Categories. Added the ability to link a subcategory directly to a WordPress/WooCommerce category so its products appear automatically (Section 2, Section 15).**
4.85.2	**—**	**Fixed: a permission checkbox could display as unchecked while the user still actually had that access underneath, for any top-level permission — now the checkbox and actual access always agree (Section 17).**

> **Dates aren't tracked for releases before this section was added — shown as "—" above rather than guessed. Every release from here forward gets a dated entry.**