

User Manual

POS OfiSoftWeb

Store-ready operating guide

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Internal document - WordPress Admin use

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1. Plugin main screen (language and shortcuts)

When you open POS OfiSoftWeb from WordPress, you land on the plugin home screen. This page works as a control panel and provides quick access to all sections.

1.1 Language

At the top you will find the language selector. You can choose Spanish or English. The selected language affects system texts: buttons, notices, screens and POS messages.

How to apply it: select the language and click **Apply and Save**. If you do not save, the change will not be stored.

1.2 Available shortcuts

Below you will see the main shortcuts. Each button opens a different section:

- **Open POS:** opens the sales (cash desk) screen.
- **POS Sales:** list of sales and documents created from the POS.
- **POS Reports:** reports filtered by date range and payment method (POS only).
- **POS Customers:** create and manage customers for invoices/proformas.
- **Daily report:** end-of-day cash closing summary.

2. Open POS (sales)

This is the counter screen. Here you select products, build the cart, add notes, take payment and generate documents (receipt, proforma or invoice).

2.1 Issuer details

Click **Issuer details** to open a window where you enter the information printed on documents.

- **Invoices and Proformas:** used on invoices and proformas.
- **Receipts:** used on receipts.

Why it is separated: invoices/proformas usually require full fiscal/company data, while receipts are meant for quick sales.

2.2 Reset numbering (document numbering)

Numbering identifies each document clearly and uniquely. The structure is:

- **Sequential number:** 1, 2, 3, 4... (increments per document).
- **Last two digits of the year:** 24, 25, 26...
- **Document type letter:** R (receipt), P (proforma), I (invoice).

Use **Reset numbering** when you need to restart counters - typically when a new year starts.

2.3 Products area

The products area contains your catalog to add items to the cart.

Unified search

Search can find products using multiple fields (for example: title, SKU, description). This helps you find items quickly even if the customer only remembers partial information.

Recommended: for returns without a receipt, search by **SKU** to locate the exact item.

Product quick card

- Product name.
- Main image (if available).
- SKU.
- Price.
- Quantity you can add to the cart.

2.4 Create a last-minute product

There is an area to create a product on the spot (without leaving the POS). Useful for new or one-off items.

Typical fields:

- Product title.
- SKU (optional).
- Price.
- Quantity to add to the cart.

When you save/create, the product is created in WooCommerce and added to the cart.

2.5 Cart area

The cart is the summary of what will be charged. Each line shows the item and allows adjustments before checkout.

Line elements:

- **Product:** identifies the item.
- **SKU:** confirms the right item.
- **Price:** editable (corrections/adjustments).
- **Discount:** percentage discount.
- **Quantity:** adjustable up to available stock.

Workflow: adjust price, apply a percentage discount, or correct quantities before taking payment.

2.6 Notes

Below the cart there is a **Note** field. Use it for important information: internal remarks, clarifications or incidents.

Notes are stored with the order and may appear on the printout depending on the document type.

2.7 Take payment: payment method and change

When the cart is ready, click **Take payment**. Choose the payment method (for example: cash or card).

- **Card**: click Next. No change is calculated.
- **Cash**: enter the amount received; the system calculates change and prints it on the document.

2.8 Document type: Receipt, Proforma or Invoice

After payment, the POS lets you choose which document to generate:

- **Receipt**: auto-filled using **Issuer details** → **Receipts**.
- **Proforma**: asks for customer details. **Important**: proformas do not reduce stock; they are commercial/informational documents.
- **Invoice**: official document. Requires full customer details. If the customer exists, search by name, tax ID, etc.

2.9 Printing (thermal / A4)

At the end of the process, the POS generates the selected document and triggers printing. You can print to a thermal printer, A4, or any installed printer.

3. POS Sales

POS Sales shows the list of sales and documents created from the POS.

3.1 Grouped by document type

- Receipts.
- Proformas.
- Invoices.

3.2 Search (SKU inside orders)

Search can locate by document/order number and also by **SKU inside orders**. This is especially useful for returns when the customer does not have the original receipt.

Tip: enter the **SKU** to quickly find related orders instead of checking them one by one.

3.3 Actions available per sale

Each sale/document typically includes these actions:

- **Print**: reprint the document.
- **Edit**: correct order details (price, quantity, etc.).
- **Edit in POS**: reopen the order in POS mode and complete the flow up to **Take payment**.
- **Delete**: deletes the document and order (depending on workflow, stock may not be restored automatically).
- **Gift receipt**: prints a gift receipt without prices.

Operational note: when editing from POS Sales, finish the flow to the end and then close the edit tab.

4. POS Reports

POS Reports generates POS-only sales reports by date range and payment method.

4.1 Date range filter

Select a start and end date, then generate the report.

4.2 Payment method filter

Filter by cash, card, or both depending on your analysis needs.

4.3 Typical columns

- Code (document numbering).
- Sale date and time.
- Payment method.
- Total.
- Status (typically completed).

4.4 Scope: POS sales only

Sales and reports include only documents generated from the POS. Online sales or other channels are not included.

4.5 Printing the report

You can print the report or save it as a PDF using your browser print dialog.

5. POS Customers

POS Customers lets you register customers and quickly use their data for invoices/proformas.

5.1 Create a new customer

When you create a new customer, the system automatically assigns a sequential customer number.

Typical fields:

- Tax ID (or local fiscal identifier).
- Full name.
- Company.
- Address.
- Phone.
- Email.
- Note (additional information).

Click **Save customer** to store the record.

5.2 Search customers

Use the search bar to find customers by name, tax ID, company, or any remembered detail.

5.3 List and actions

The list shows the main customer data. Common actions:

- **Edit:** update details (e.g., address change).
- **Delete:** remove the customer if no longer needed.

6. Daily report

The **Daily report** is intended for cash closing. It summarizes the day's POS sales.

6.1 Summary

Shows the number of orders and total revenue for the selected day.

6.2 Breakdown by payment method

Includes a breakdown (for example, cash vs card).

6.3 Order details

Lists orders with code, time, method, total and status.

7. Taxes (required configuration)

For correct calculations, WooCommerce must be configured with **prices inclusive of tax**.

If taxes are not included, totals and tax breakdown can be incorrect because the POS relies on WooCommerce pricing settings.

7.1 Tax name

Set the tax name according to your country (for example: VAT). This name is used on documents for the breakdown.

7.2 Percentage

Set the correct percentage (for example, 21% in Spain or your local rate).

7.3 How it shows in the cart

With taxes correctly configured, the cart shows: total excluding tax, tax amount, and total including tax.

8. Requirements and compatibility

Recommendations for stable POS operation.

8.1 WordPress

Keep WordPress updated to avoid compatibility and security issues.

8.2 WooCommerce and HPOS

WooCommerce must be installed and active. The POS uses WooCommerce orders, products, stock and taxes.

The plugin declares compatibility with HPOS (High-Performance Order Storage / Custom Order Tables) to prevent compatibility warnings.

8.3 PHP and resources

Server running PHP 7.4 or higher. Recommended: enough memory to avoid errors during editing/printing.

8.4 Taxes (required)

Configure WooCommerce taxes with prices inclusive of tax (see section 7).

8.5 Stock

The POS follows WooCommerce stock settings (for example, preventing sales when out of stock).

8.6 Cache and optimization

Cache/optimization plugins can interfere if they minify or block admin scripts. If you see odd behavior, disable cache for the admin area while testing.

8.7 Printing

Printing depends on the browser and configured device. Make sure the printer is installed and selected correctly.

9. Common issues and quick fixes

Edits are not saved when modifying an order

This usually happens if the edit tab is closed before finishing the flow. Click **Take payment**, complete the process to the end, then close the tab.

Order does not open in POS / buttons do not respond

Likely a cache/optimization conflict or JavaScript error. Clear cache, temporarily disable optimization plugins and check the browser console (F12 → Console).

Search does not find products by SKU

Verify the SKU is correct, the product has an SKU, and it is visible/published. Also try searching by part of the name to validate.

Last-minute product does not go into the cart

Try creating without an SKU to test and check for errors in the browser console or debug.log.

Tax totals do not match (VAT missing or wrong)

Ensure WooCommerce is set to prices inclusive of tax and the tax rate/name are configured correctly.

Nothing prints

Check the default printer, browser permissions and try printing to A4 via the browser print dialog.

Reports do not show the sales you expected

POS reports include only sales made from the POS. Online sales or other channels will not appear.

Deleting an order does not restore stock

Depending on workflow, Delete removes the order/document without automatically restoring stock. Restore stock manually if required.

If an issue is not listed here, check: (1) browser console, (2) WordPress error logs, and (3) conflicts with cache/security plugins.