LULU STEP-BY-STEP GUIDE

Point of Sale: run a till day

A full in-store trading day on the Lulu POS register, from the morning set-up to the end-of-day count: stock at the right location, products on the Point of Sale channel, staff PINs and roles, opening the drawer, selling, taking payment, receipts, returns and exchanges, cash in and out, closing with an over/short count, and the reports afterwards.

For: Everyone · About 20 minutes · 16 steps · Updated November 20, 2026

Before you start This guide assumes the Lulu POS app is already added and one device is paired. If not, follow “Set up Point of Sale with one device” first: it covers adding the app (“Lulu POS”, handle `shopwise-pos`), creating a register, pairing a device at `/pos/pair` and giving a staff member a PIN. You need the store owner account or a role with the Point of Sale and inventory permissions. Some steps depend on your Lulu POS package (Lite, Retail or Pro); each step says so where it matters.

Steps at a glance

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STEP 1

Check the app and the register's location

Open Point of Sale in your admin sidebar (`/admin/pos`). If you land on the install page, click “Add for free” on Lite, then continue with “Set up Point of Sale with one device”. Next, go to Point of Sale → Registers (`/admin/pos/registers`) and open the register you'll use today. Its “Location” decides where every sale on it takes stock from. A register set to “No location” uses the “Default location” from Point of Sale → Settings (“Used when a register has no location of its own”).

- Locations themselves are created under Settings → Locations (“Add location”).
- Before you open the till, check that the register's location is the shop it physically stands in. Stock and the “out of stock” checks in the next step all follow it.

STEP 2

Put stock at that location (and fix “out of stock at this location”)

The register only sells what is in stock at its own location. If a product's quantity is tracked, it doesn't allow overselling, and the register's location holds none, the cart shows a warning such as ““Product name” is out of stock at Galle Road — 12 available at Main store”, or “Only 2 of “Product name” are in stock at Galle Road — 9 more at Main store” when you ask for more than there is. It's a warning, not a block: you can still charge the sale, and that location's stock goes below zero (as in Shopify POS). Stock elsewhere is named so you know where to fetch it, but it isn't sold from here. To fix it, open the product, then the variant (`/admin/products/…/variants/…`). In the “Inventory” card, with “Track quantity” on, the table lists every location with “Committed”, “Available” and “On hand”. Type the quantity into “Available” on the register's row and save. Alternatively, go to Products → Inventory (`/admin/inventory`), pick the location in the location selector (not “All locations”), click the Available number for the item, choose “Set to” or “Adjust by”, and “Save”.

- “Continue selling when out of stock” on the variant lets the register sell below zero. Use it for made-to-order items, not as a quick fix for stock that really is at another shop.
- If you turn “Track quantity” off, the register never checks stock for that variant.
- Changing quantities needs the “Manage inventory” permission. Without it, the variant page says “You can view quantities. Ask a store admin for “Manage inventory” to change them.”

STEP 3

Move stock between locations with a transfer

If the stock exists but sits at another location (a warehouse or another branch), move it rather than typing new numbers. Go to Products → Transfers (`/admin/transfers`) and click “Create transfer”. Choose the “Origin” and the “Destination” (the register's location), click “Add product” to add the items and quantities, and save it (“Save as draft”). When the goods leave, click “Mark as in transit”. When they arrive at the shop, open the transfer and click “Receive items”. The received quantity becomes available at the destination, and the register can sell it.

- The Transfers page needs the transfers permission (view or manage). It is part of your admin and isn't locked to a POS package.
- Lulu POS Pro lists “Branch transfers and cross-branch returns”. On the till itself, Pro is what allows a return of a sale made at another location (see the returns step).

STEP 4

Make sure products are published to Point of Sale

The register's search, Library, tiles and barcode scans only find products that are Active and published to the Point of Sale channel. Open a product and look at the “Publishing” card. Under “Sales channels and apps”, tick “Point of Sale” and save. The card says “This product is draft, so it isn’t visible on any channel until you set it to Active” when the status is the problem. To change many products at once, select them on the Products list and use “Publish to…”, pick Point of Sale and click “Publish” (“Unpublish from…” does the reverse).

- A product you have never changed publishing for is available on every channel, Point of Sale included. Only a product someone unticked (or scheduled) is hidden from the till.
- Each channel row also has “Schedule” (“Publish on” / “Unpublish on”) if a product should only appear at the till from a given date.

STEP 5

Staff, PINs, POS roles and location access

People are added under Settings → Users and permissions, which links to the Users page (`/admin/staff`), and roles live on its Roles tab. Built-in POS roles are “POS administrator”, “POS full permissions”, “POS user administrator” and “POS device setup”. A custom role created as a “POS role” holds only Point of Sale permissions. The permissions that matter on a till day include “Apply custom discounts”, “Apply discount codes”, “Add custom sales”, “Edit taxes”, “Redeem store credit”, “Return and exchange orders”, “Create unverified returns”, “Cancel”, “Open drawer”, “Start and end payment tracking sessions” and “Manager approval”. Then go to Point of Sale → Staff & PINs (`/admin/pos/staff`). Use “Give POS full access” for someone with “No POS access”, and “Set PIN” to give them a 4–6 digit PIN.

- “Edit locations” on Staff & PINs lets you choose where each person “Can sign in here”, with an optional location role in place of their “Store-wide role” at that location. This per-location access needs Lulu POS Retail or Pro; on Lite the rows are locked.
- The store owner always shows “All locations (owner)”.

STEP 6

How manager approval works at the till

When a cashier tries something their role doesn't allow, the register opens a “Manager PIN” pad instead of just refusing. This covers actions at checkout and on orders, such as tax exempt, a return, voiding a sale or a cross-location order lookup. A custom discount works differently: a cashier without “Apply custom discounts” sees “You don’t have permission to apply custom discounts. Ask a manager to approve it.” and “Apply” stays off, so a manager signs in on the register (switch user) to apply it, or you add the permission to the cashier's role. The default line is “A manager needs to approve this action.” A manager types their own PIN and taps “Approve”. It only works if that manager holds “Manager approval” and the permission being approved, at this register's location. The approval is single use, lasts at most 5 minutes, and is tied to that cashier, that register and (where the screen knows it) that order or amount. The approver is recorded.

- There is no separate “price override” on a line. To sell an item for less, apply a custom discount to the line (next steps), which falls under “Apply custom discounts”.
- If the PIN is wrong or the manager lacks the permission, the pad says “That PIN wasn’t recognized”.

STEP 7

Sign in and open the register with a float

On the paired device, open `/pos` and “Sign in” with your PIN, or tap “Use email and password”. If no drawer is open, a banner says “No register session is open. Open one to track cash in the drawer.” Tap “Open register”, count the cash under “Cash in the drawer now” (or tap “Use last close · amount” to reuse yesterday's closing count), add an optional note, and tap “Open register · amount”. That amount is the opening float.

- Opening and closing the drawer needs “Start and end payment tracking sessions”.

STEP 8

Ring up items: Grid, Library, Keypad and search

The top of the register has the search bar (“Search or scan to add items”) and three modes. “Grid” shows your smart-grid tiles, which can be products, collections, discounts, fees, links and actions such as “Add custom sale” or “Add gift card”. “Library” browses collections and products, with “Favorites”. “Keypad” is for a custom amount: type it, optionally fill “Name (optional)” (it defaults to “Custom sale”), choose “Charge tax on this amount”, and tap “Add to cart”. Custom sales need “Add custom sales”. Without it, the keypad says “You don’t have permission to add custom sales. Ask a manager to approve it.” Tap a cart line to change “Quantity”, add a line note, or apply a line discount.

- Search by name, or scan or type a barcode. See “Barcode scanning in POS without a scanner” for exactly how codes are matched.
- A product with several variants opens a variant picker. A single-variant product goes straight into the cart.

STEP 9

Customer, discounts, notes and tax exempt

Tap “Add customer” in the cart to search (“Search or scan customers”) or “Create customer” (name, email, phone, marketing consent). Under the cart lines are three quick chips. “Add discount” opens “Percentage”, “Amount” or “Code”, with an optional “Reason (optional)”, then “Apply”. “Tax exempt” removes tax from the whole sale. “Add note” takes an order note, saved with “Save note”. For a single line, tap it and choose “Apply custom discount”, or type a line “Note” (“Prints on the receipt”). The ⋯ “Cart actions” menu adds “Attribute sale” (credit the sale to a staff member), “Add service charge”, “Saved carts” and “Ship all items”.

- Percentage and amount discounts are custom discounts (“Apply custom discounts”). A code uses “Apply discount codes”. “Tax exempt” needs “Edit taxes”. Without the right permission the manager-approval pad appears.
- “Remove line discount” and “Remove discount” undo them.

STEP 10

Park a sale with Saved carts

If a customer steps away, tap “Save cart” under the cart, give it a “Name” and save it. The cart clears for the next customer. To pick it up again, open “Saved carts” (from the ⋯ menu, the More menu or the Library shortcut) and choose it. Saved carts don't hold stock, and any register in this store can open them. Deleting one (“Delete cart”) removes it for every register.

- Saved carts are part of the Retail and Pro packages, and use the “Manage saved carts” permission.

STEP 11

Take payment: cash, card, split and other tenders

Tap “Checkout · total”. Choose a tender. For “Cash”, enter “Cash received” or tap a quick amount (the first is marked “Exact”); the screen shows “Change due” and you tap “Accept” (the button shows the cash taken). For “Card”, charge the customer on your own card terminal (“Charge this on the card terminal, then record it below.”), then fill “Amount taken on the card”, “Card type”, “Last 4 digits” and “Terminal reference”, and tap “Record” (the button shows the amount). For a split, enter less than the total on one tender: the rest shows as “Remaining after this payment”, the header changes to “Split payment”, and you pick the next tender for the remainder. When everything is covered, tap “Complete sale · total”.

- Other tenders appear when they're switched on under Point of Sale → Settings → “Payment types”. They are “Gift card” (scan or type the code, “Check balance”, “Redeem”), “Store credit” (only with a customer attached; needs “Redeem store credit”), “Bank transfer”, “Mobile wallet”, your own custom payment types, and “Custom…” for a cheque or voucher.
- “Mintpay” (pay in 3 by QR code or SMS link) appears only when Mintpay is set up under Settings → Payments.
- If “Show a tip prompt at payment” is on in Point of Sale → Settings, the customer is offered a tip first.
- The card tender only records a payment taken on a separate terminal. The register does not charge cards itself.

STEP 12

Give a receipt

After the sale the register asks “How would you like the receipt?”. “Email” sends it to the customer's address (you can type another and tap “Send receipt”). “Print” uses the browser's 80 mm print view, or the USB/serial receipt printer set on the register. “No receipt” skips it. Then tap “New sale”.

- “Text message” is shown, but Lulu has no SMS gateway yet. The request is logged and no text is actually sent, so use email or print.
- Email and text need a connection (“Needs a connection” when offline). Printing works offline.
- To print automatically after every sale, tick “Auto-print receipt after a sale” on the register.

STEP 13

Returns and exchanges

Open More → “Returns and exchanges” (`/pos/returns`). Under “Find the order”, scan the receipt's barcode or search by order number, customer or item, then pick the order. Choose the items and quantities, an optional “Return reason”, and whether to “Restock at (this location)”. Tap “Next · amount”, check the “Return summary”, choose where the money goes (“Original payment”, “Cash”, “Store credit” or “Gift card”), add the “Refund approval number” if you refunded on the card terminal, and tap “Refund” (the button shows the amount). For an exchange, tap “Exchange” instead of Next. The return becomes “Exchange credit” on a new sale at the register, and the customer pays or gets back only the difference.

- Package rules: a return to the original shop is on every package (Lite included). Exchanges and refunds to store credit need Retail. Returning a sale that was made at a different location needs Pro. Otherwise the till shows “Available on Retail — upgrade Lulu POS to use this” (or Pro).
- “Return without receipt” refunds only to “Store credit” or “Gift card”. Because that counts as store credit, it also needs Retail and the “Create unverified returns” permission.
- Returns need “Return and exchange orders”. Without it, a manager can approve with their PIN.

STEP 14

Cash in and out during the day

Open More → “Register session” (`/pos/session`). “Current drawer” shows “Starting cash”, “Cash sales”, “Paid in”, “Paid out & drops”, “Cash refunds” and the running “Expected in drawer”. Use “Pay in” for cash added (a float top-up), “Pay out” for petty cash taken out, and “Drop” for cash moved to the safe or bank. Each asks for an “Amount” and a “Reason”. Every movement is listed under “Drawer activity”.

STEP 15

Close the register and count the cash

At the end of the day, on `/pos/session` tap “Close register”. Count the drawer and enter it as “Cash counted”. “Expected in drawer” stays hidden until you tap “Show”, so the count is blind. The register then shows “Drawer balances”, “Over” or “Short” with the difference. Add a note (it asks you to “explain the difference” when there is one) and tap “Close register”. This cannot be undone once the session is closed.

- A manager can also close a forgotten session from the admin: Point of Sale → Sessions → the session → “Close session”, entering “Counted cash”. This needs “End payment tracking sessions from the admin”.

STEP 16

Review the day: Reports and Sessions

In the admin, Point of Sale → Reports (`/admin/pos/reports`) shows in-person sales for “Today”, “Last 7 days”, “Last 30 days” or “Last 90 days”. You can filter by location, register and staff. The page shows “Net sales”, “Orders”, “Average sale”, “Tips”, “Refunds”, “Discounts” and “Tax collected”, with tables “By tender”, “By staff”, “By register” and “By hour”, plus “Cash drawer movements”. “Export CSV” downloads the data. Point of Sale → Sessions lists every drawer session with its “Variance”. Open one to see the “Cash ledger”, tenders, staff and the orders taken on it.

- “By location” (branch reports) is “Available on Pro”.
- “External POS sales” lists sales pushed in by your own POS system through the Admin API, kept out of the register figures.

Check your work

- The register's “Location” (or the POS “Default location”) is the shop it stands in.
- Products you sell are Active and ticked for “Point of Sale” in their “Publishing” card.
- Stock is set (or transferred and received) at the register's location.
- Each cashier has POS access, a PIN, and a role with the permissions they need; at least one manager has “Manager approval”.
- The drawer was opened with a counted float.
- A test sale was completed with cash (change due shown) and a receipt emailed or printed.
- A return was processed from `/pos/returns`.
- The drawer was closed with a blind count, and the session shows its variance under Point of Sale → Sessions.
- Point of Sale → Reports shows the day, and “Export CSV” downloads it.

Troubleshooting

The cart says ““…” is out of stock at …”, but the product has stock.

The stock is at a different location. The register only counts the location set on it (or the POS “Default location” when the register has none). Set the quantity for that location on the variant's “Inventory” card or in Products → Inventory with that location selected, or move stock with Products → Transfers → “Create transfer”, then “Mark as in transit” and “Receive items”. For made-to-order items, tick “Continue selling when out of stock” instead.

A product doesn't appear in the register's search or Library.

Check that it is Active and that “Point of Sale” is ticked in its “Publishing” card, or that a “Publish on” schedule hasn't been set for a later date. Draft and archived products never appear on the till.

A cashier can't apply a custom discount (“Apply” stays off).

Their role lacks “Apply custom discounts” (or “Apply discount codes” for a code). Either a manager signs in on the register and applies it, or you add the permission to the cashier's role on the Users page's Roles tab. Staff with “POS full permissions”, administrators and the owner can always apply custom discounts.

“Returns and exchanges” is greyed out, or a return is refused with an upgrade message.

Returns at the original shop are included in every package. Exchanges and store-credit refunds need Retail, and returns of sales from another location need Pro. The refusal message names the package you need. Until then you can still refund the order from the admin under Orders.

The customer didn't receive a text-message receipt.

SMS receipts aren't available yet: there is no SMS gateway, so the request is only logged. Send the receipt by email or print it.

The drawer is short or over at close.

Check “Drawer activity” on `/pos/session` (or the “Cash ledger” on the session in admin) for pay-outs, drops and cash refunds that weren't counted. Record the reason in the close note. The variance stays on the session for reporting.

Need a hand? Contact support at https://lulu.us.com/contact. Screenshots use demonstration accounts; personal details were replaced.