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Implementation Guide

[Point of Sale Order Transfer Plugin](#)

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## 1.0 Introduction

Odoo POS (Point of Sale) provides solutions when it comes to handling payment counters in retail stores where customers pay for their purchased goods. It helps to manage your Restaurants, shops. It has a comprehensible, user-friendly interface & is used in Ipads, tablets, or laptops.

Since Odoo's Software is generally built software for all types of retail business and owners, it is not tailored to a particular customer or retailers. Thus, to make it suitable for custom needs, customized plugin need to be integrated.

## 1.1 Target Audience

1. Existing Odoo users
2. Odoo Point of Sale Users
3. Business Owners
4. Retail & Wholesale Business Owners & staffs

## 1.2 Problem Statement

Currently, in any Version of Odoo, there is no feature to transfer the Order from one Shop/Session/Point of sale to another.

## 1.3 Solution



By adding a feature - >Transferring/Forwarding current order to other point of sale

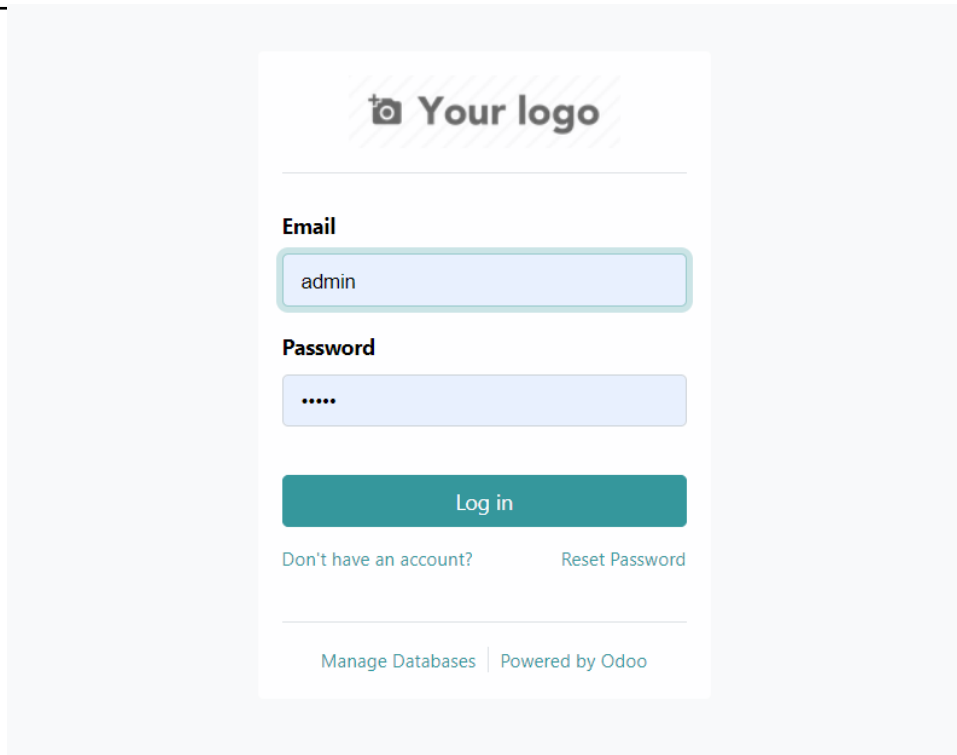
## 1.4 Features

1. Main Branch & Sub branch Division between Point of sales.
2. Point of sale user can Transfer one Order to other Point of sale.
3. Automatically updates the number of Transfer counts
4. User Can Merge the Transferred order with Current order or Make as a New Order
5. User can see the incoming Orders in separate screen

## 1.5 Work Flow Explanation

Login using your user credentials.

### **Step 1)**



## **Step 2)**

**Use this menu path: Point of sale > Dashboard**

Create 2 shops/point of sale and mark one as Center branch & other Sub branch using check box.



Point of Sale

Shop

Resume Close

- View
- Orders
- Sessions
- Reporting
- Orders
- Settings



Point of Sale / Shop (Mitchell Admin)

Point of Sale

Shop

A session is currently opened for this PoS. Some settings can only be changed after the session is closed.

**Company**  
My Company (San Francisco)

**Is a Bar/Restaurant**

**Authorized Employees**  
Use employee credentials to log in to the PoS session and switch cashier

**Is a Center Branch**  
Mark as Center Branch if it is.

### Step 3)

**Use this menu path: Point of sale > Dashboard**

Click on **NEW SESSION** button to start new session and wait to load the Point-of-sale screen



Point of Sale

### Shop

**NEW SESSION**

Last Closing Date 07/27/2023  
Last Closing Cash Balance \$ 0.00

**Step 4)**

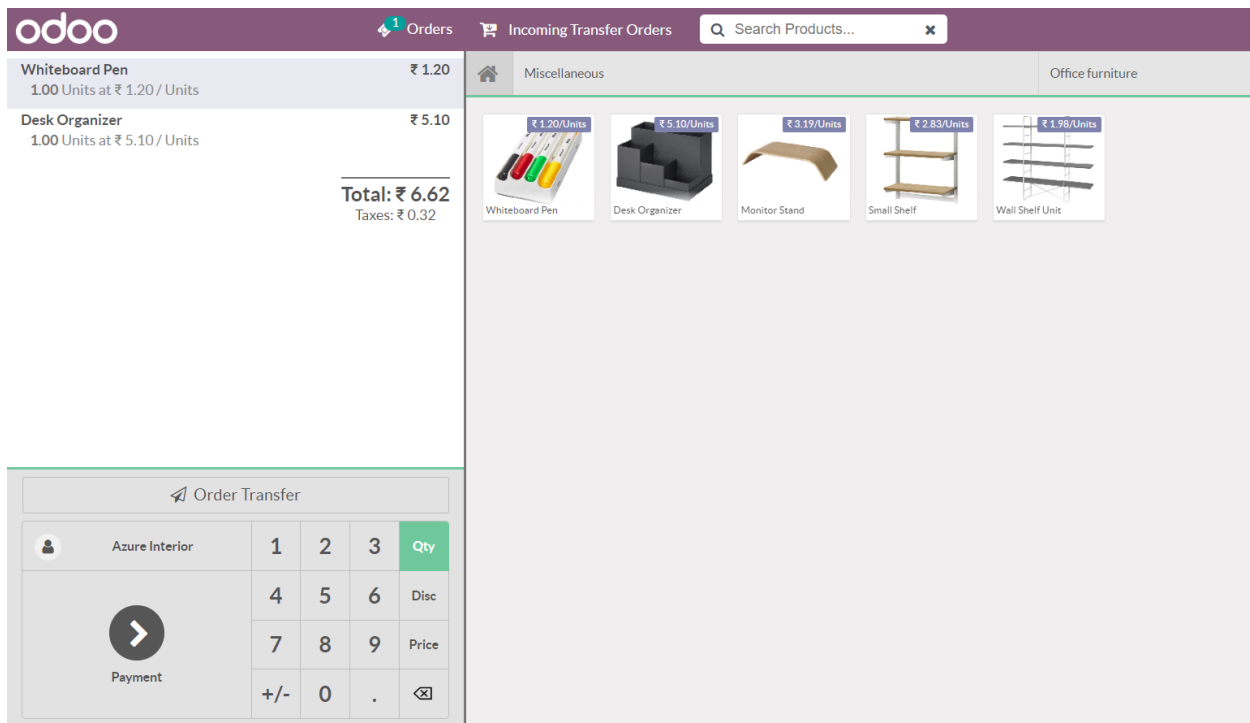
You will get this screen

The screenshot shows the Odoo POS interface. At the top, there is a navigation bar with 'odoo' logo, 'Orders' (with a notification), 'Incoming Transfer Orders', and a search bar. Below the navigation bar, the main area is split into two sections. On the left, there is a shopping cart icon and the text 'This order is empty'. On the right, there is a product grid with two categories: 'Miscellaneous' and 'Office furniture'. The 'Miscellaneous' category is active, showing five products: 'Whiteboard Pen' (₹ 1.20/Units), 'Desk Organizer' (₹ 5.10/Units), 'Monitor Stand' (₹ 5.19/Units), 'Small Shelf' (₹ 2.83/Units), and 'Wall Shelf Unit' (₹ 1.98/Units). At the bottom, there is a numeric keypad for 'Order Transfer' with fields for Customer, Qty, Disc, Price, and Payment.



**Step 5)**

- 1) Add products
- 2) Add quantities
- 3) Add customer
- 4) Click on the **Order Transfer** Button in the number pad

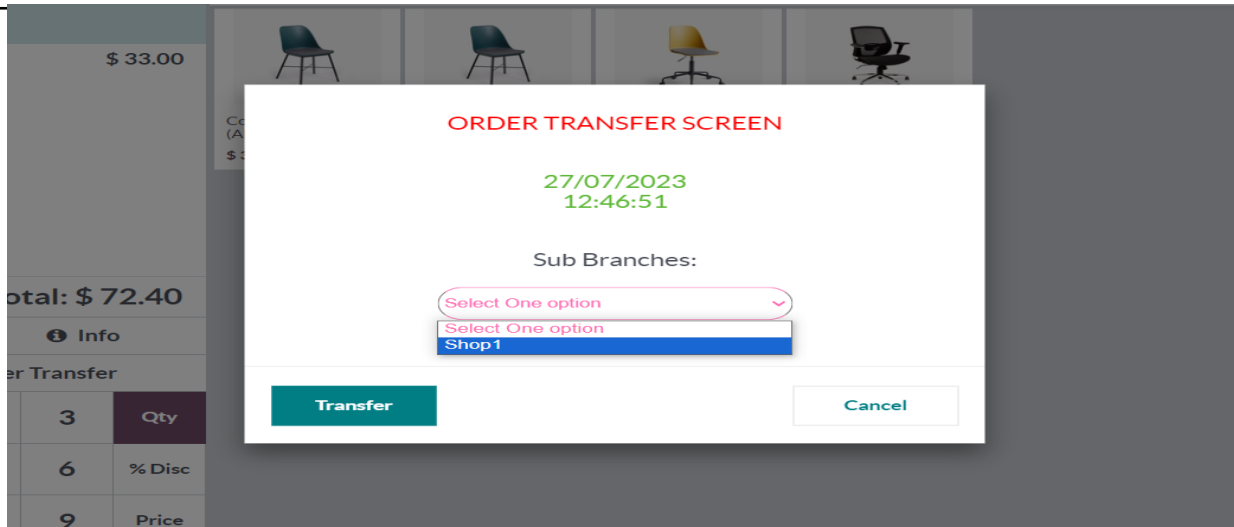


**Step 6)**

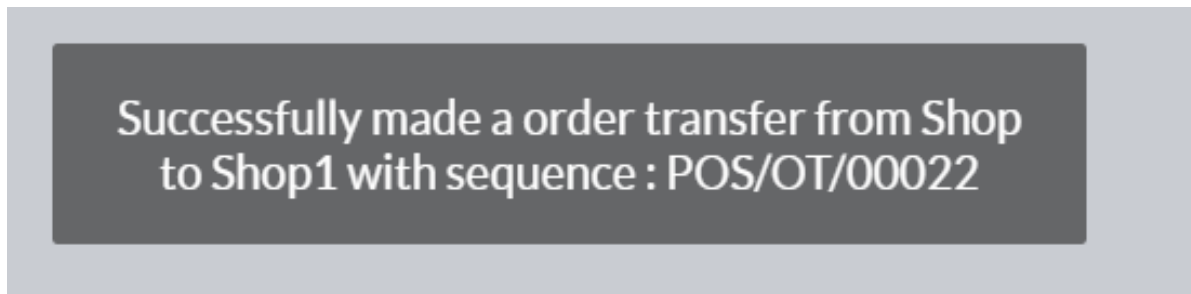
You will get a popup like this picture

Select one shop to transfer from the drop-down menu

Click on **Transfer** Button



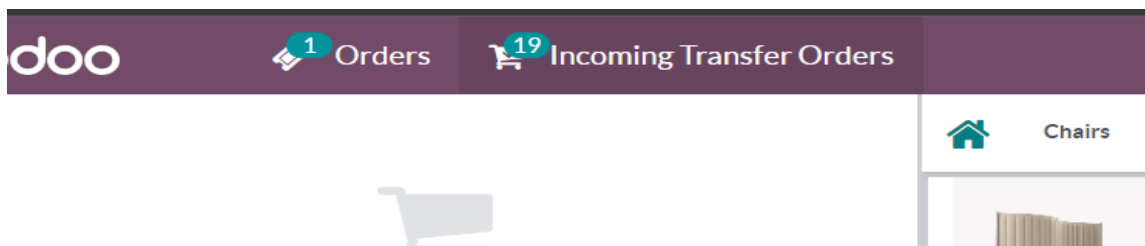
An intimate message will show the details of the order transferred.



**Step 6)**

Login as sub branch user session

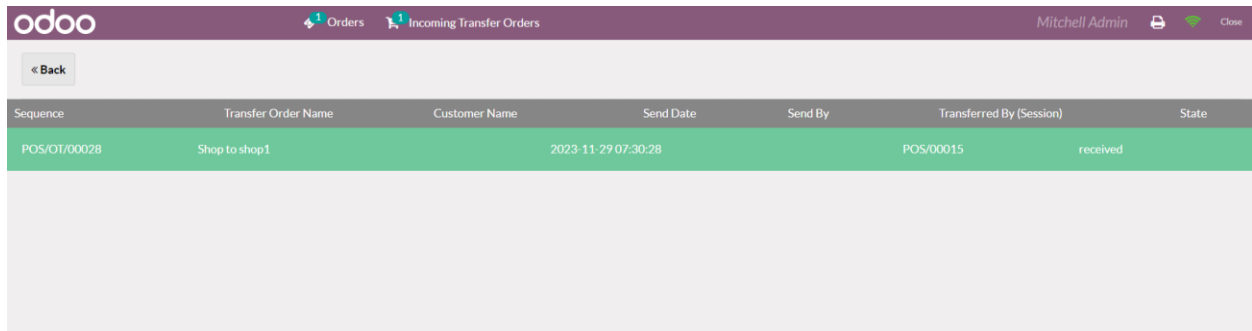
And click on the Incoming Transfer order button



### Step 6)

You will get a screen like this:

Click on the raw you need to transfer.



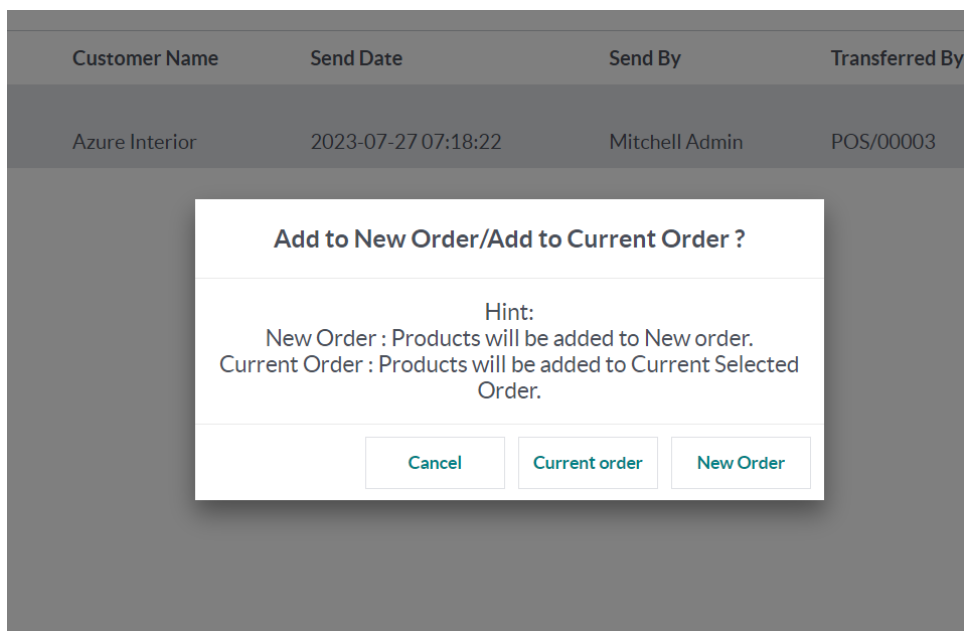
The screenshot shows the Odoo POS interface. At the top, there is a purple header with the Odoo logo, navigation icons for 'Orders' and 'Incoming Transfer Orders', and the user name 'Mitchell Admin'. Below the header is a grey bar with a 'Back' button. The main content is a table with the following columns: Sequence, Transfer Order Name, Customer Name, Send Date, Send By, Transferred By (Session), and State. A single row is highlighted in green, representing a transfer order.

Sequence	Transfer Order Name	Customer Name	Send Date	Send By	Transferred By (Session)	State
POS/OT/00028	Shop to shop1		2023-11-29 07:30:28		POS/00015	received

### Step 6)

Click on the button from the popup as you needed.

Hint is provided



The screenshot shows a modal dialog box titled 'Add to New Order/Add to Current Order ?'. The dialog contains a hint: 'New Order : Products will be added to New order. Current Order : Products will be added to Current Selected Order.' Below the hint are three buttons: 'Cancel', 'Current order', and 'New Order'. The background shows a table with columns: Customer Name, Send Date, Send By, and Transferred By. The row 'Azure Interior' is selected.

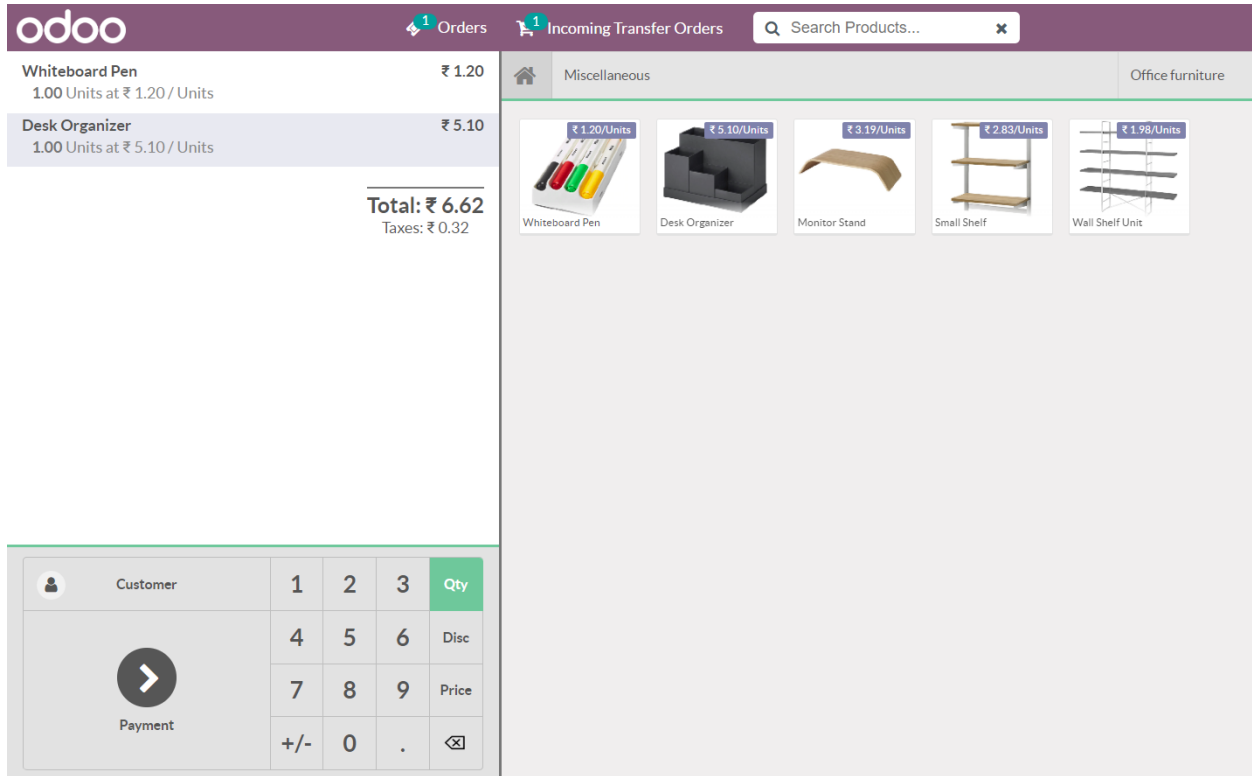
Customer Name	Send Date	Send By	Transferred By
Azure Interior	2023-07-27 07:18:22	Mitchell Admin	POS/00003

**Add to New Order/Add to Current Order ?**

Hint:  
New Order : Products will be added to New order.  
Current Order : Products will be added to Current Selected Order.

**Step 6)**

You will get back to the product screen with context you have selected.



The screenshot shows the Odoo POS interface. The top header includes the Odoo logo, navigation icons for Orders and Incoming Transfer Orders, and a search bar. The main area is divided into two sections: a product list on the left and a product grid on the right. The product list shows 'Whiteboard Pen' (1.00 Units at ₹ 1.20) and 'Desk Organizer' (1.00 Units at ₹ 5.10). The total amount is ₹ 6.62, with taxes of ₹ 0.32. The product grid displays five items: Whiteboard Pen (₹ 1.20/Units), Desk Organizer (₹ 5.10/Units), Monitor Stand (₹ 3.19/Units), Small Shelf (₹ 2.83/Units), and Wall Shelf Unit (₹ 1.98/Units). At the bottom, there is a numeric keypad with buttons for Customer, Qty, Disc, Price, Payment, +/-, 0, ., and a clear button.

1.6 Release Note

POS Order Transfer is for Odoo version 14.0