Implementation Guide

Point of Sale Order Transfer Plugin

Table of Contents

1.0 Introduction 3

1.1 Target Audience *3*

1.2 Problem Statement 3

1.3 Solution 3

1.4 Features 4

1.5 workflow explanation 4

1.6 Release Note 11

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

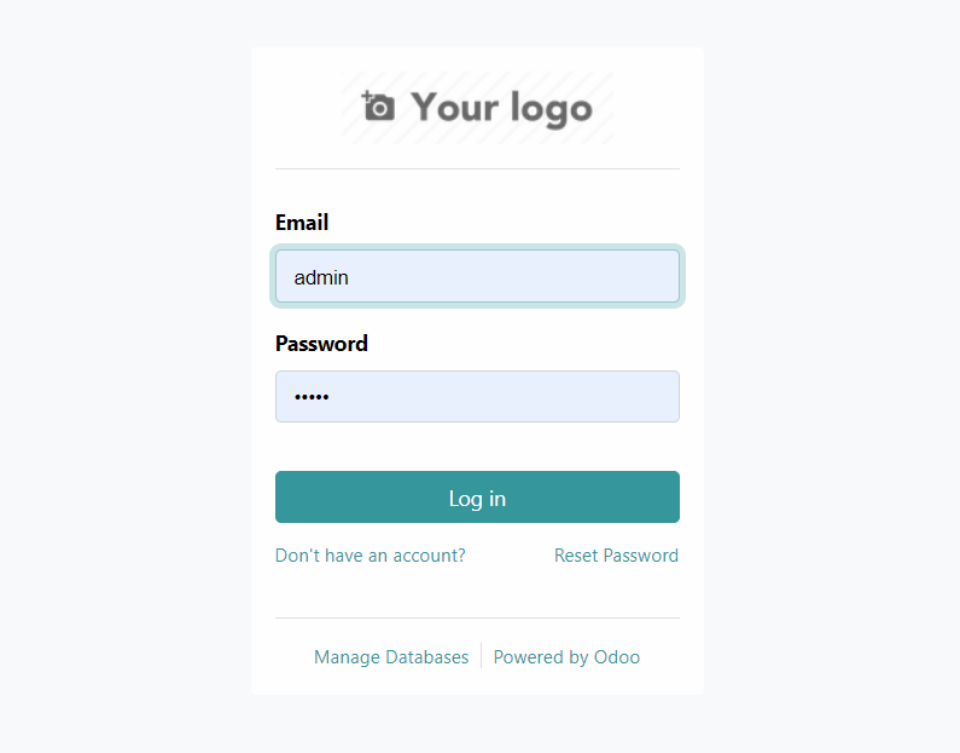
1.4 Features

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.

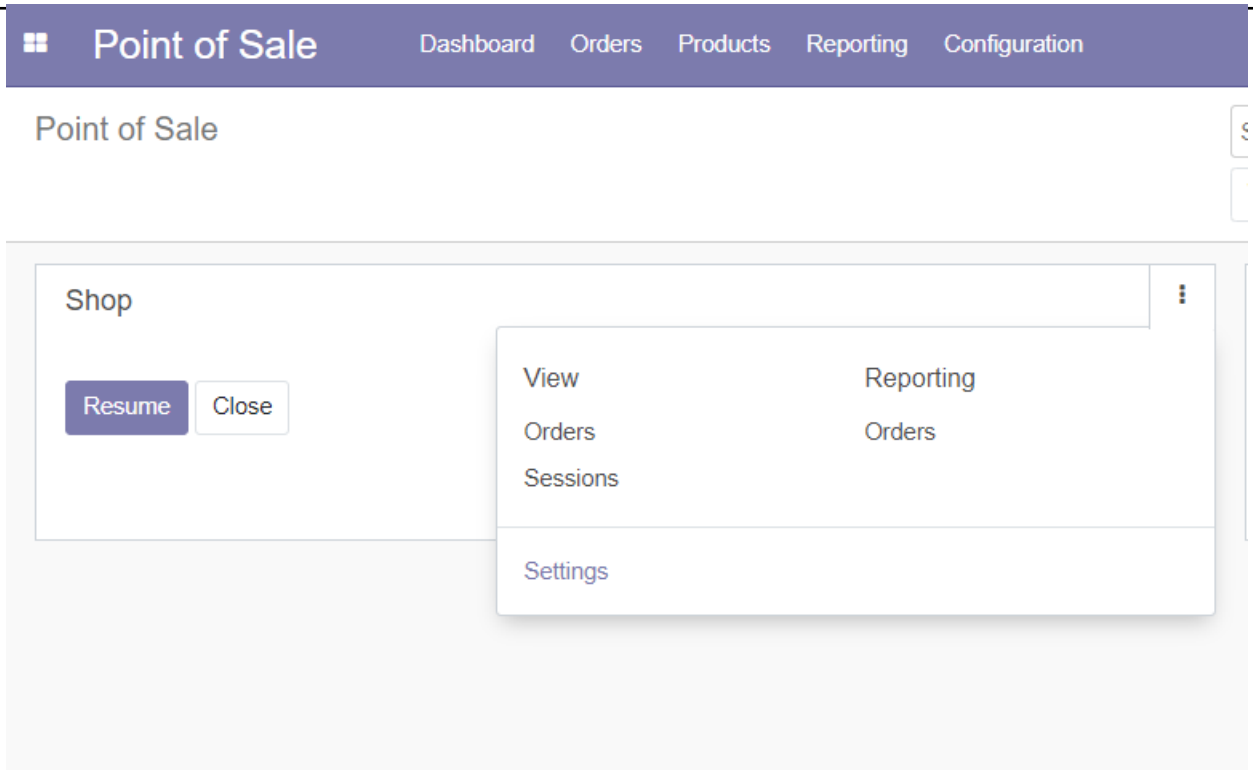
Step 1)

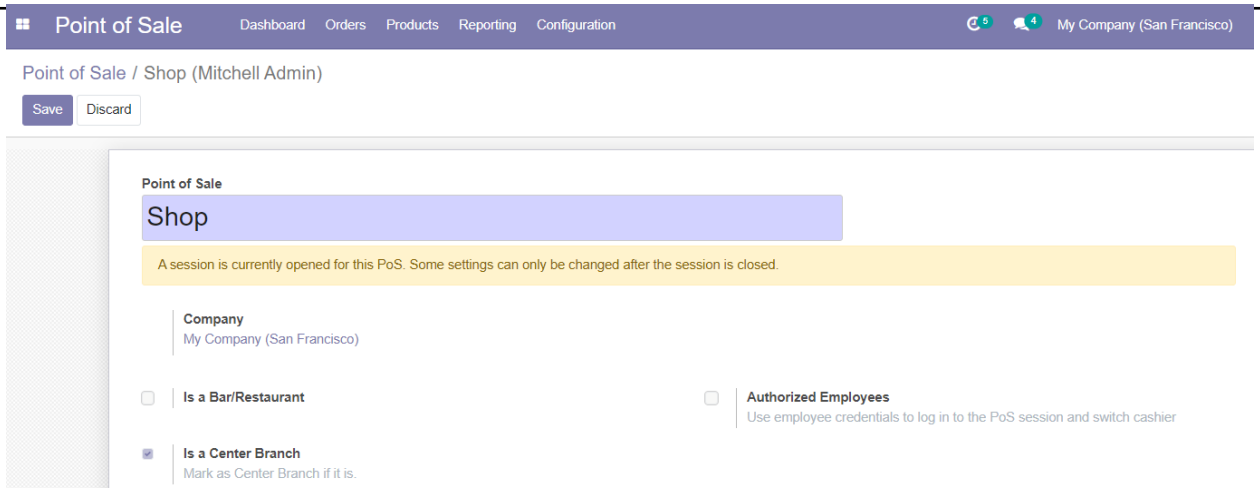


Step 2)

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.

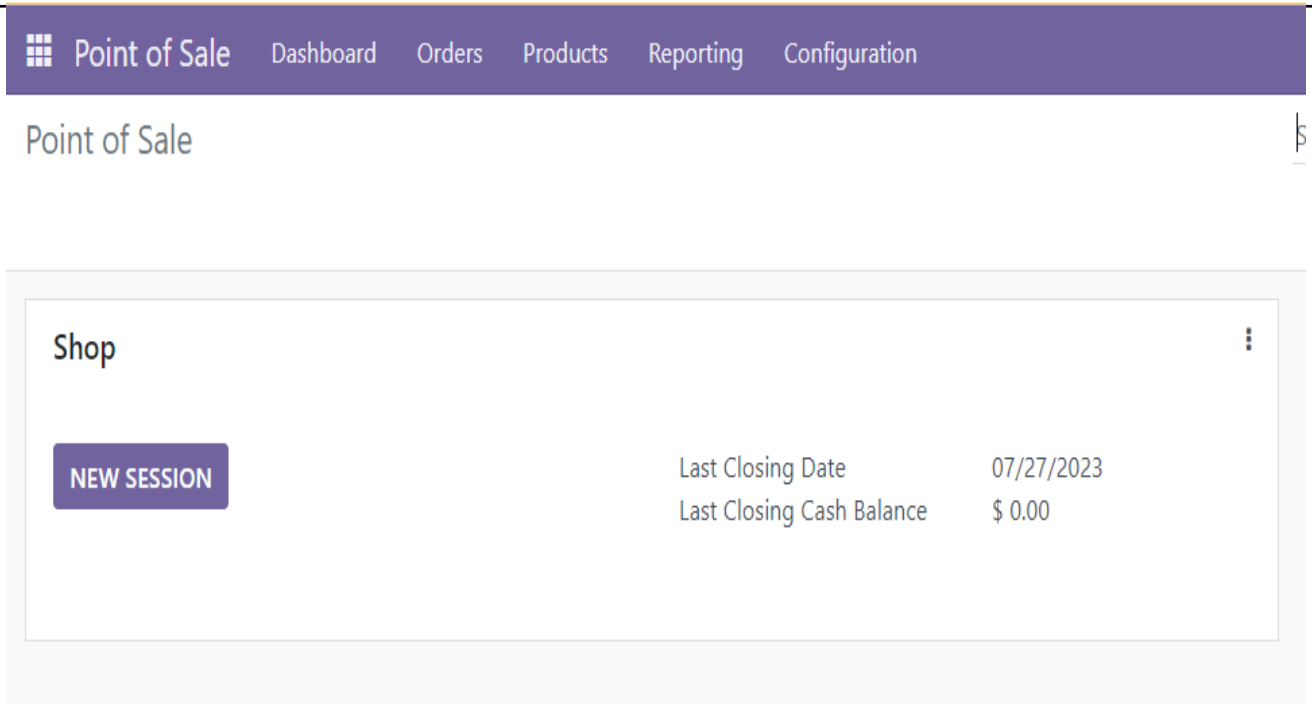

Point of Sale
Dashboard
Orders
Products
Reporting
Configuration
Point of Sale
Shop
Resume
Close
View
Orders
Sessions
Reporting
Orders
Settings



Step 3)

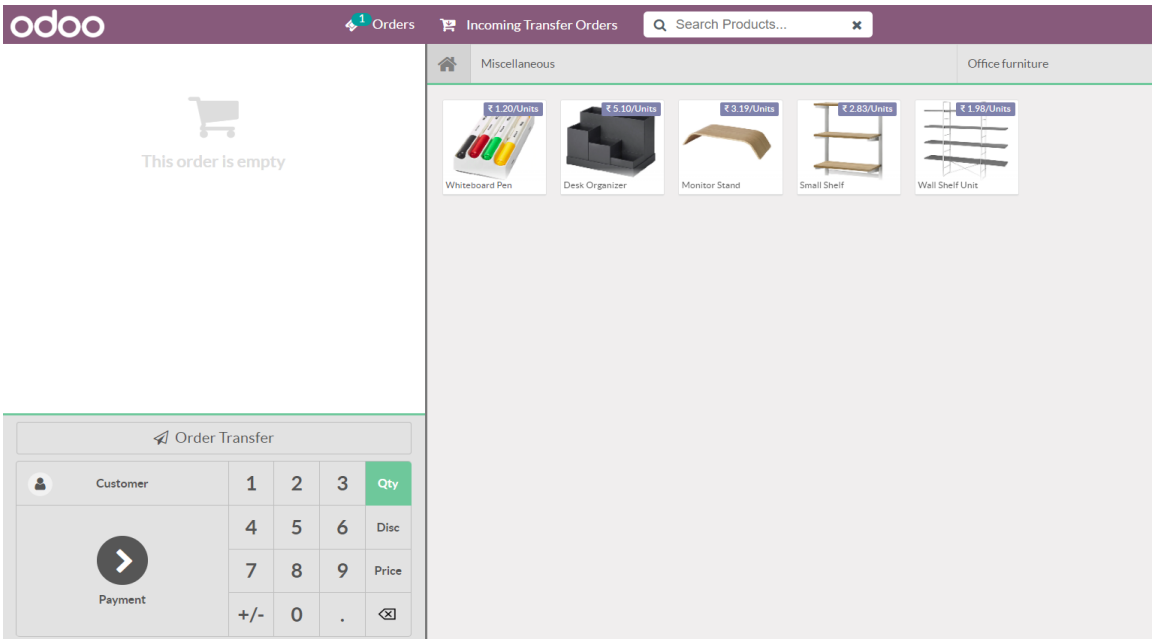
Use this menu path: Point of sale > Dashboard

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



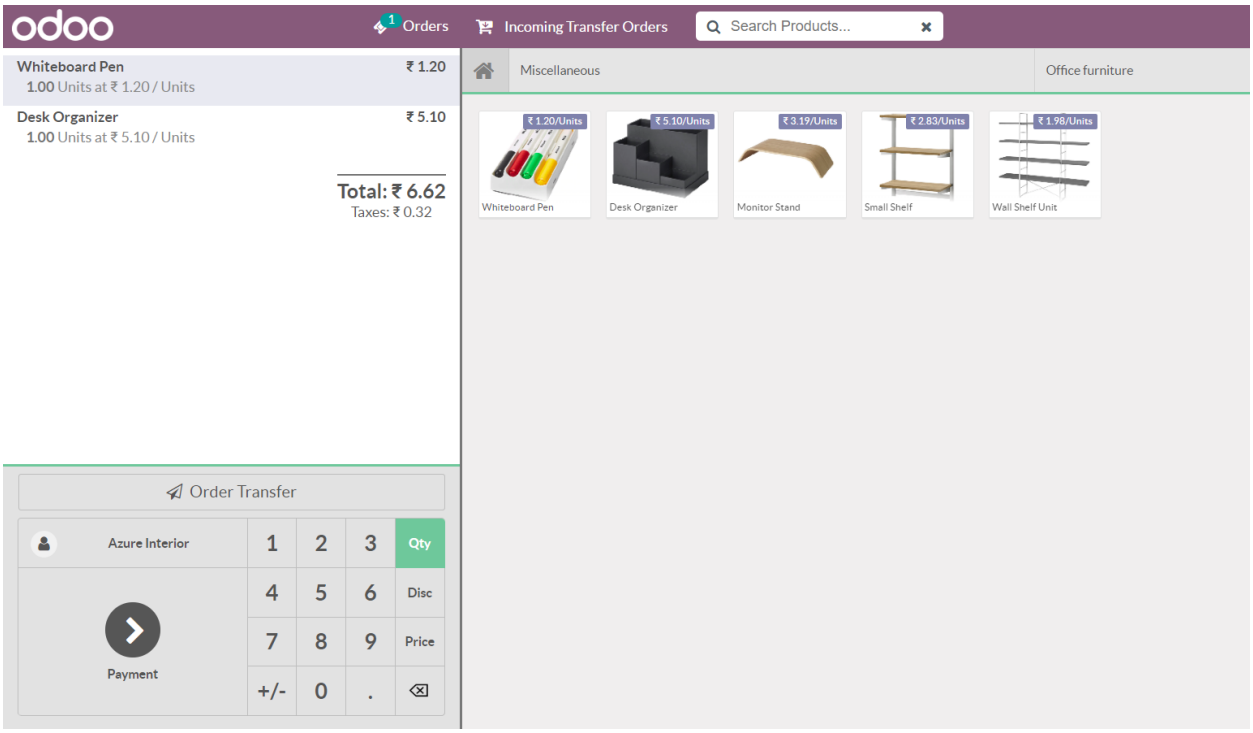
Step 4)

You will get this screen



Step 5)

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

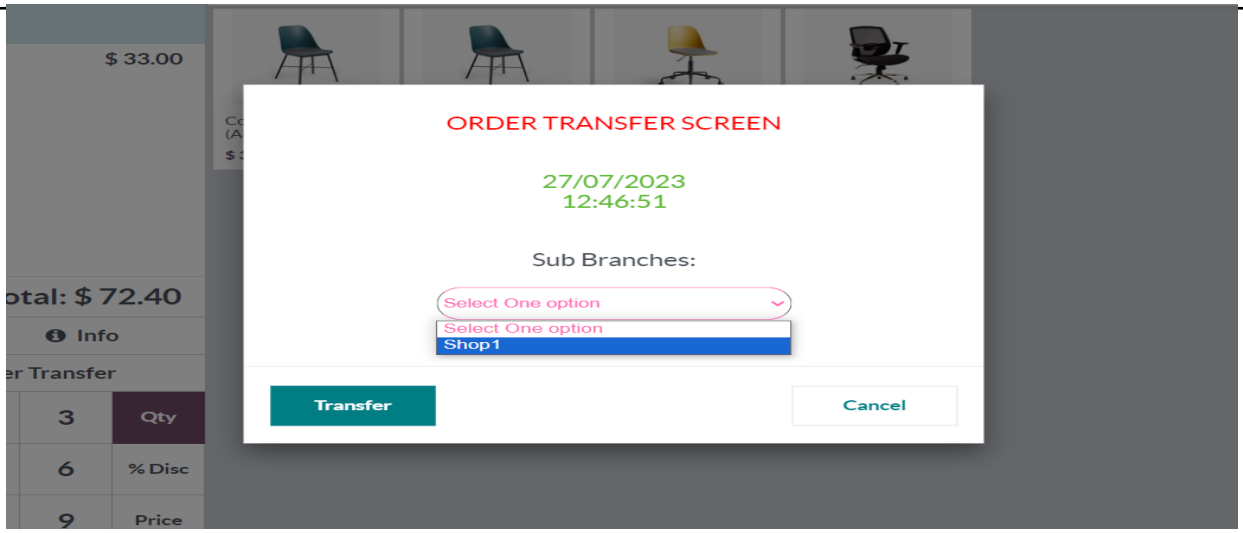


Step 6)

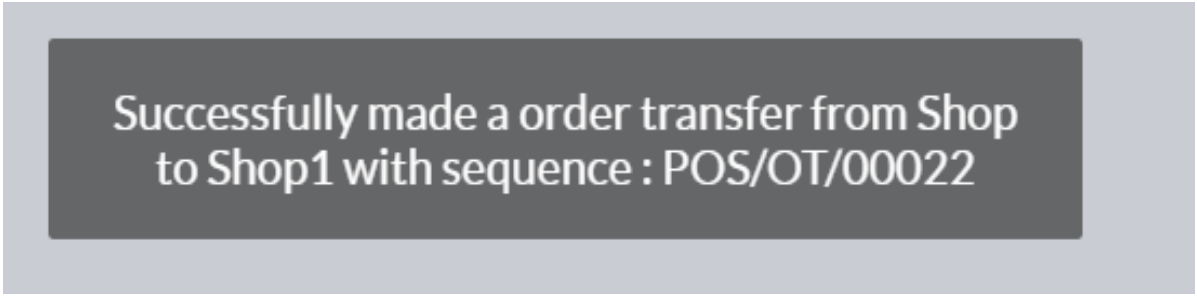
You will get a popup like this picture

Select one shop to transfer from the drop-down menu

Click on **Transfer** Button



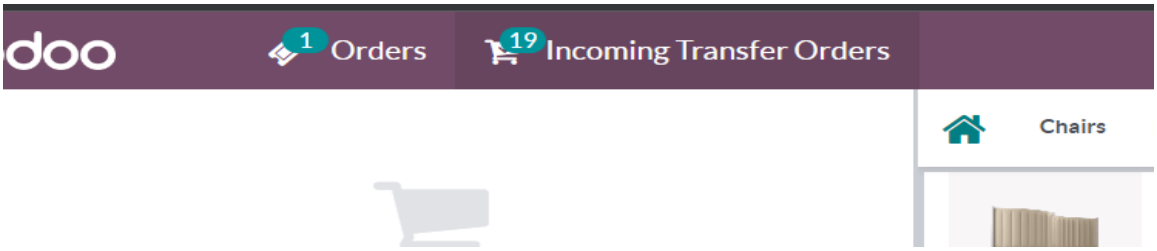
An intimate message will show the details of the order transferred.



Step 6)

Login as sub branch user session

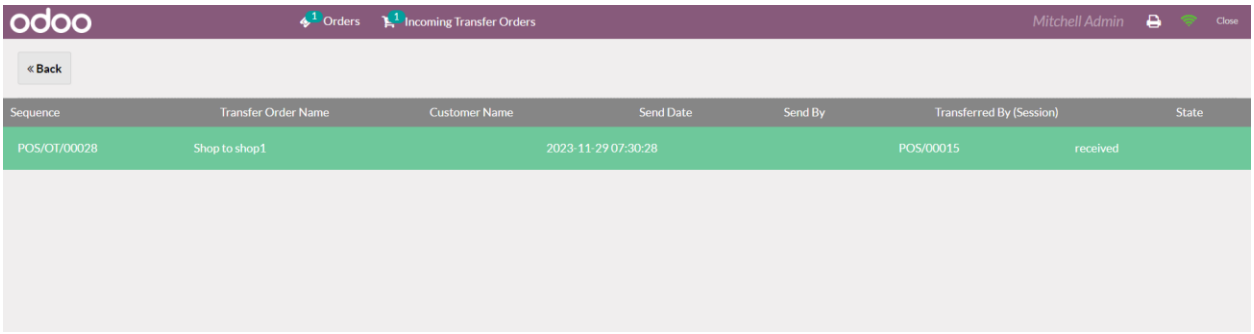
And click on the Incoming Transfer order button



Step 6)

You will get a screen like this:

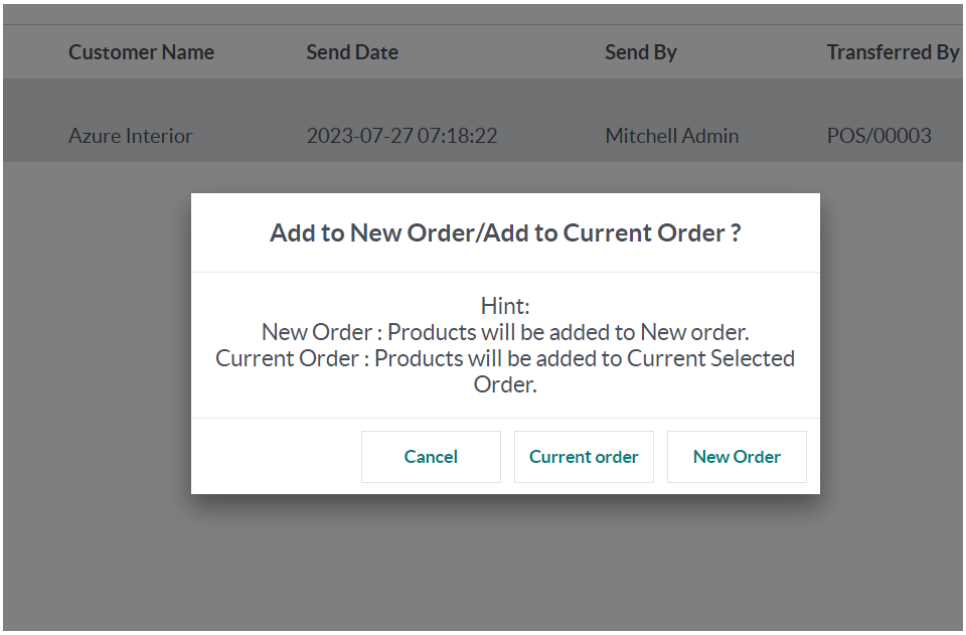
Click on the raw you need to transfer.



Step 6)

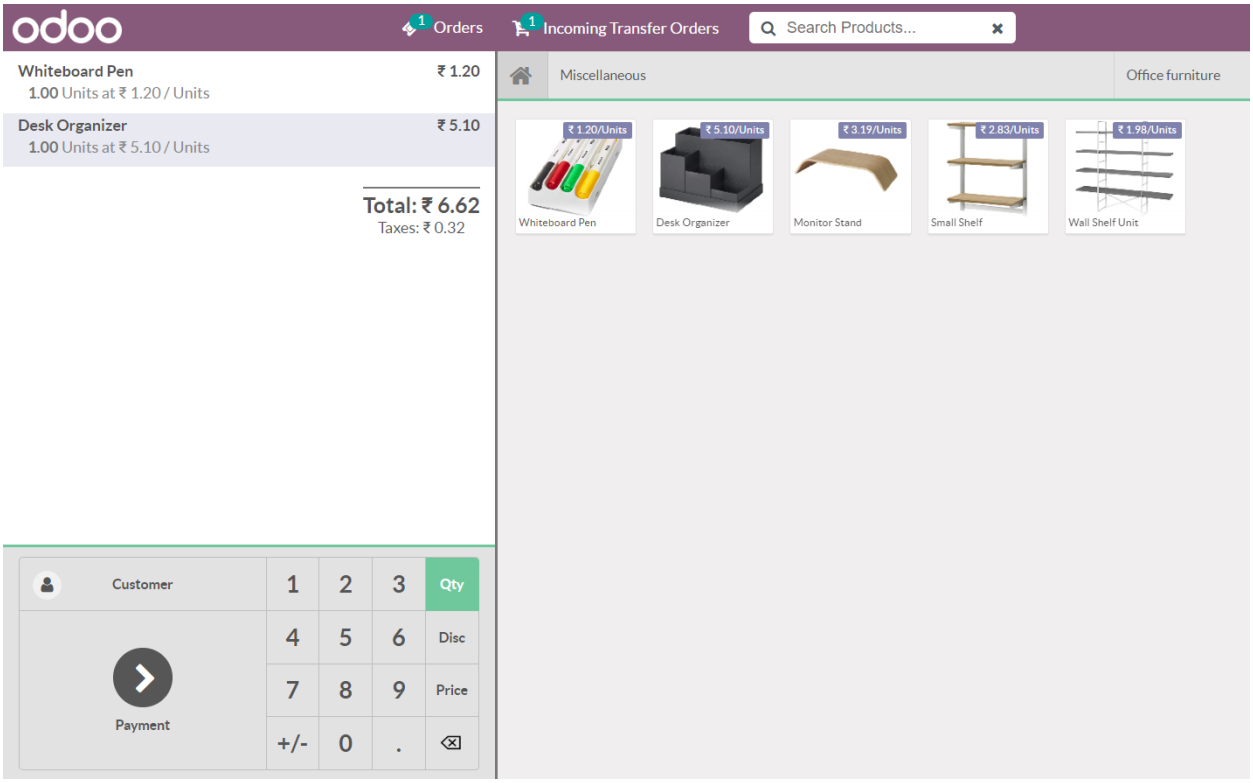
Click on the button from the popup as you needed.

Hint is provided



Step 6)

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



1.6 Release Note

POS Order Transfer is for Odoo version 14.0