



User Manual

Van Sales POS Plugin for Odoo v17.0



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1. Introduction

The van point of sale is easy to install and fits neatly into the Odoo web shop. This module adds a few features to the point of sale that are specific to VAN sales. In this module, all the products are stored in the warehouse, which can be fully controlled by the module inventory. Here the process starts with the loading of products into the van, and the process ends at the time of unloading the unsold products from the van.

2. Features

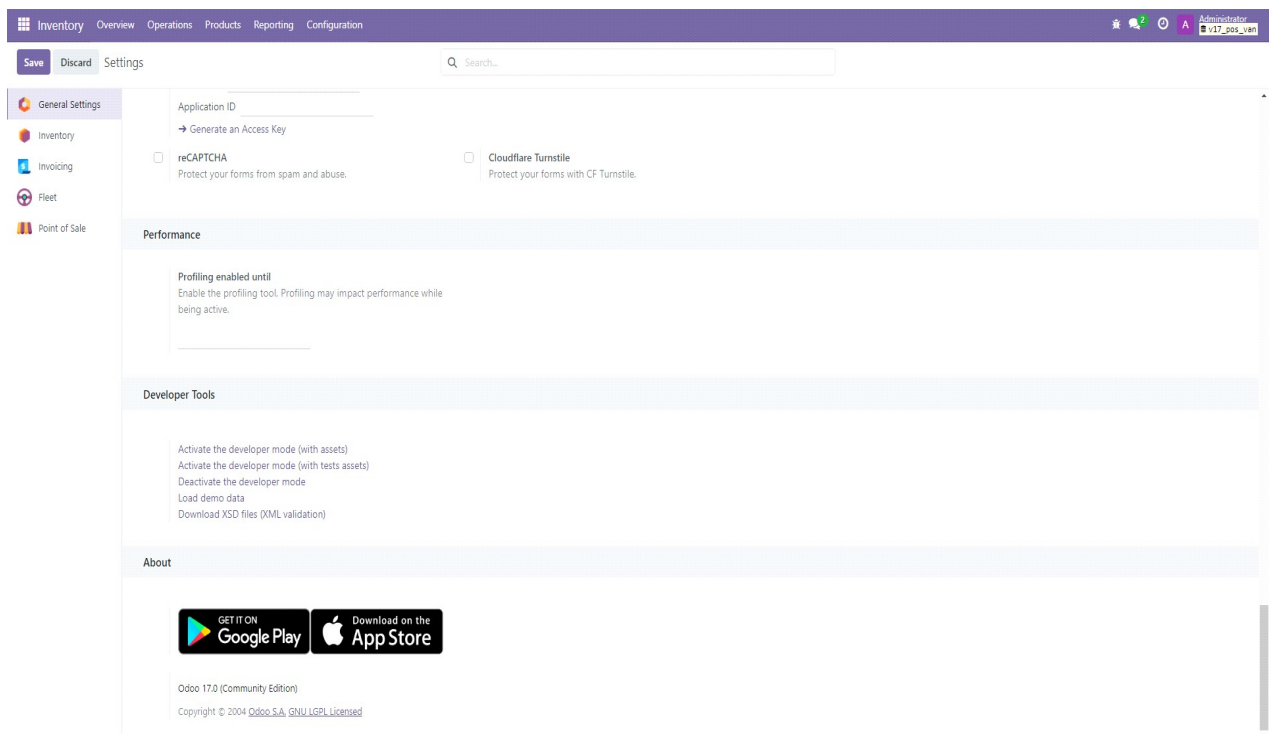
- Easy to configure a POS as Van Sale POS.
- All van stock is recorded.
- Loading and unloading processes are recorded.
- Session management is mainly based on the loading and unloading of products.
- Stock management is controlled by the inventory module.
- Transparent stock transfer history.
- This module adds new features to the point-of-sale module.
- Salesman and supervisor groups are created.
- **Enable Realtime Inventory in POS**

To ensure accurate stock management and apply quantity restrictions in real-time during Point of Sale (POS) transactions, you need to enable the **Realtime Inventory** feature in the POS module (*Refer Screenshot 33*). This setting allows the system to check the actual stock levels instantly and prevent overselling.

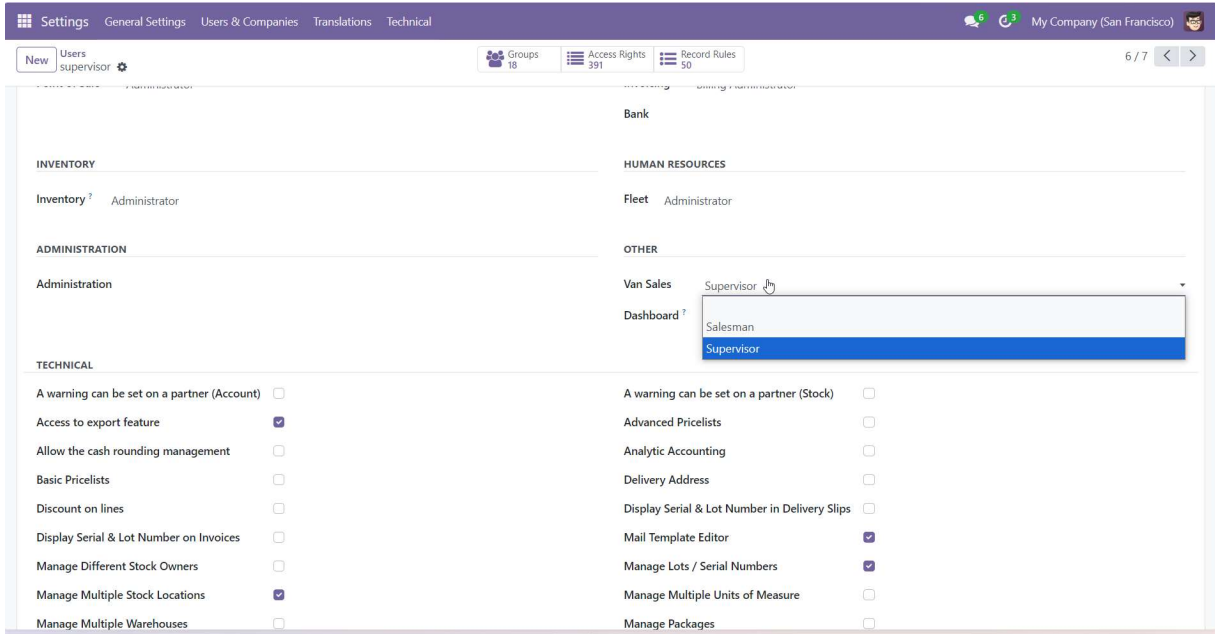
3. Screenshots

Screenshot 1: Van point of sale - Add Salesman or Supervisor user groups:

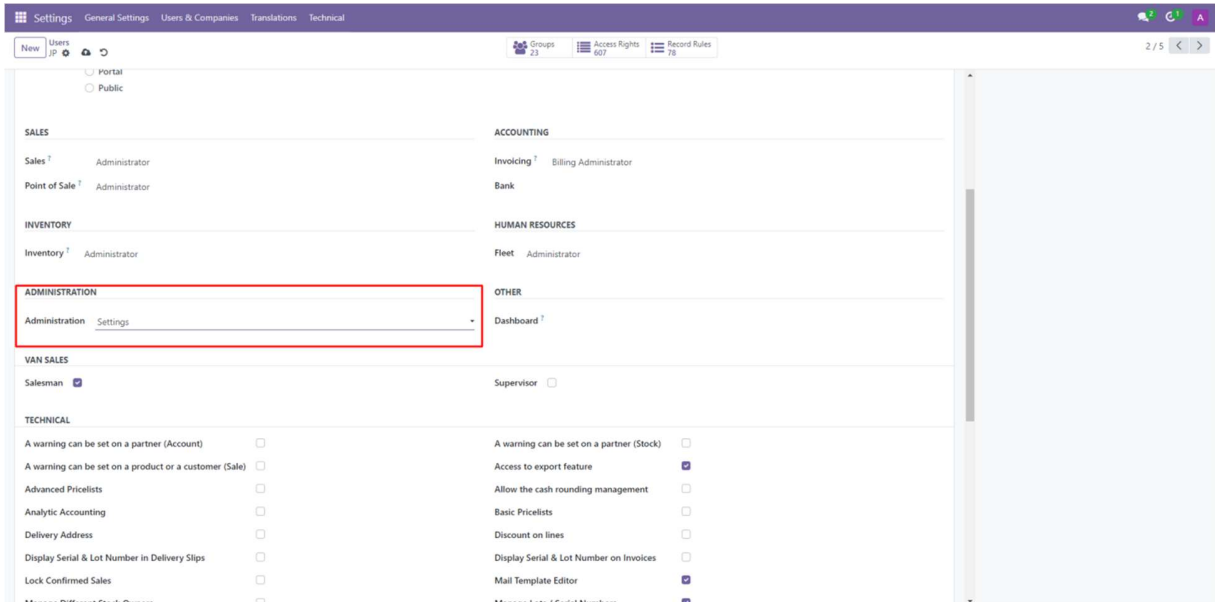
- Go to *Settings*.
- Enable developer mode by clicking on the 'Activate the developer mode'.



- Navigate to *User & Companies* menu -> Select *Users*.
- Open the desired User -> Enable *Salesman/Supervisor* role -> Save.

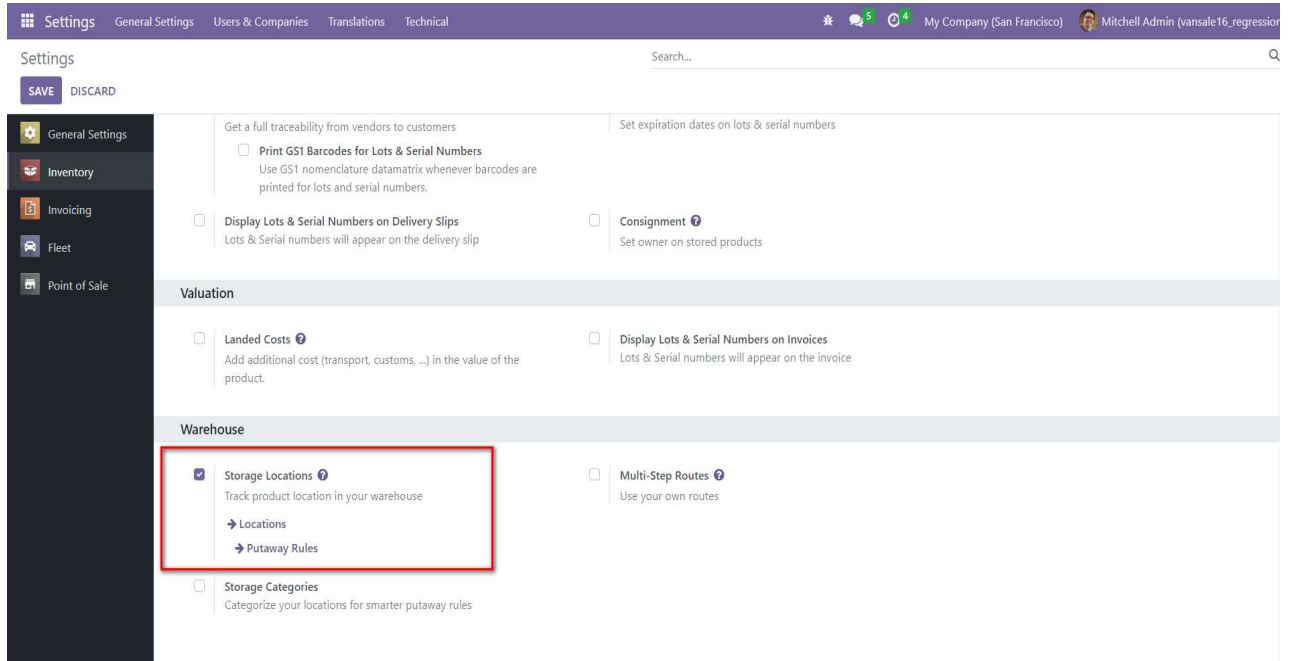


- If you want to give supervisor as administration access.



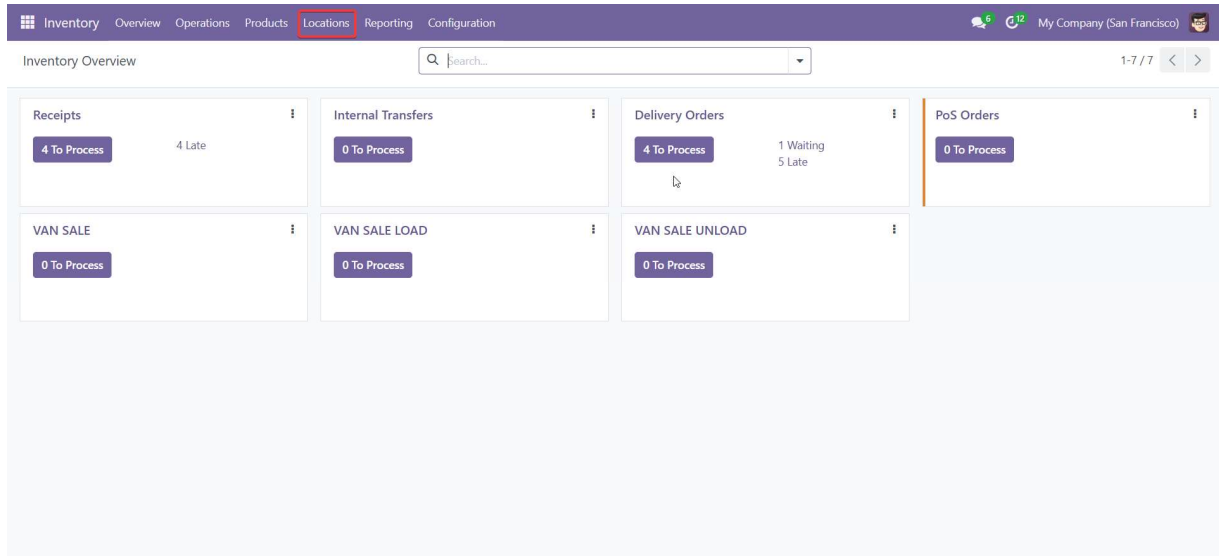
Screenshot 2: Van point of sale - Enable Storage locations:

- Go to *Settings -> Inventory*.
- Enable *Storage Locations checkbox -> Save*.



Screenshot 3: Van point of sale – Locations menu item:

- Go to *Inventory*.
- *Locations*.

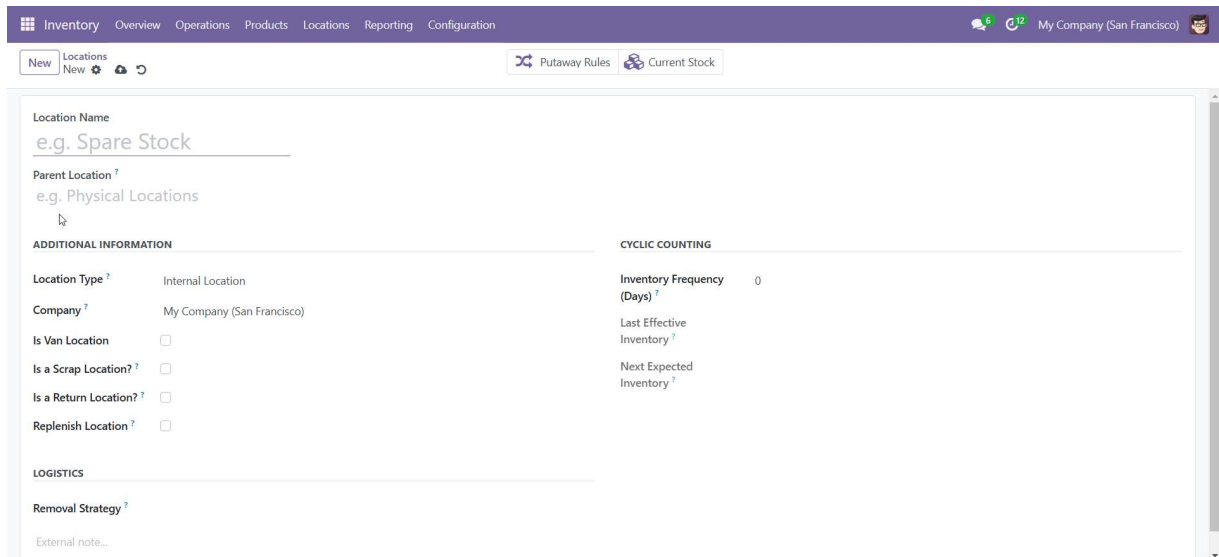


Screenshot 4: Van point of sale – Locations list view:

Location	Location Type	Company
<input type="checkbox"/> Test Location	Internal Location	My Company (San Francisco)
<input type="checkbox"/> Van Sale Location	Internal Location	My Company (San Francisco)
<input type="checkbox"/> Van Sale Location	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Input/Order Processing	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone/Gate B	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock/Moon Location	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock/Shelf 1	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock/Shelf 2	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock/Shelf 2/Small Refrigerator	Internal Location	My Company (San Francisco)
<input type="checkbox"/> WH/Stock/Sun Shop Location	Internal Location	My Company (San Francisco)
<input type="checkbox"/> Y Location	Internal Location	My Company (San Francisco)

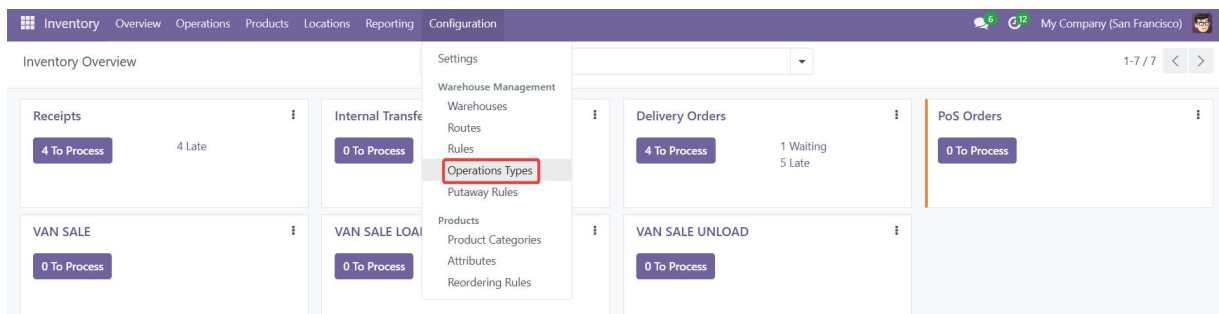
Screenshot 5: Van point of sale – Adding a new location:

- Enable the "Is VAN Location" checkbox to allow this location to be selectable in the POS Configuration's Stock Location settings.



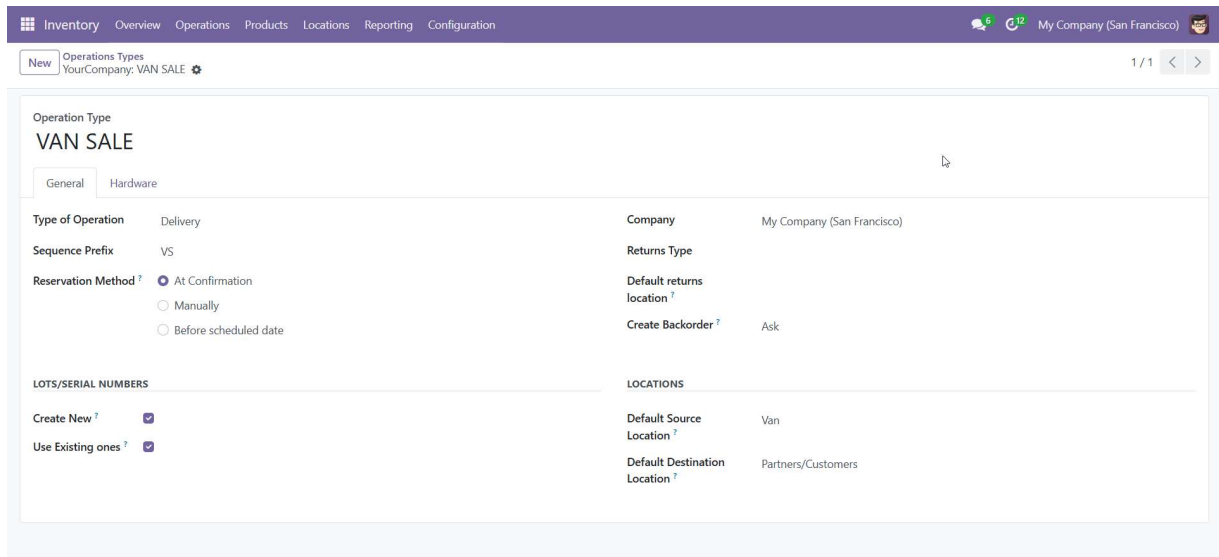
Screenshot 6: Van point of sale - operation types:

- Go to *Inventory*
- Navigate to *Configuration -> Operation types*



Screenshot 7: Van point of sale operation type - VAN_SALE:

- This operation type is used for stock move from VAN to Partners/Customers locations.

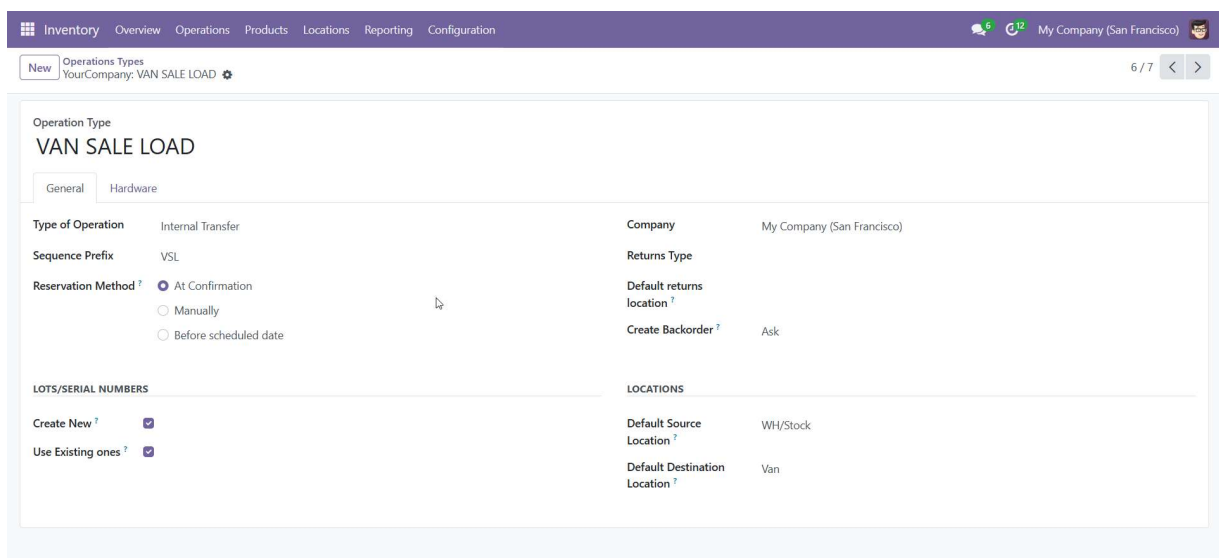


The screenshot shows the Odoo configuration interface for the 'VAN_SALE' operation type. The breadcrumb trail is 'Inventory > Overview > Operations > Products > Locations > Reporting > Configuration'. The page title is 'New Operations Types YourCompany: VAN_SALE'. The configuration is divided into 'General' and 'Hardware' tabs, with 'General' selected. The 'Type of Operation' is 'Delivery'. The 'Sequence Prefix' is 'VS'. The 'Reservation Method' is 'At Confirmation'. The 'Company' is 'My Company (San Francisco)'. The 'Returns Type' is 'Default returns location'. The 'Create Backorder' is 'Ask'. The 'LOTS/SERIAL NUMBERS' section has 'Create New' and 'Use Existing ones' both checked. The 'LOCATIONS' section has 'Default Source Location' as 'Van' and 'Default Destination Location' as 'Partners/Customers'.

Field	Value
Type of Operation	Delivery
Sequence Prefix	VS
Reservation Method	At Confirmation
Company	My Company (San Francisco)
Returns Type	Default returns location
Create Backorder	Ask
LOTS/SERIAL NUMBERS	
Create New	<input checked="" type="checkbox"/>
Use Existing ones	<input checked="" type="checkbox"/>
LOCATIONS	
Default Source Location	Van
Default Destination Location	Partners/Customers

Screenshot 8: Van point of sale operation type - VAN_SALE_LOAD:

- This operation type is for stock move from warehouse locations to the VAN prior to the beginning of sales.

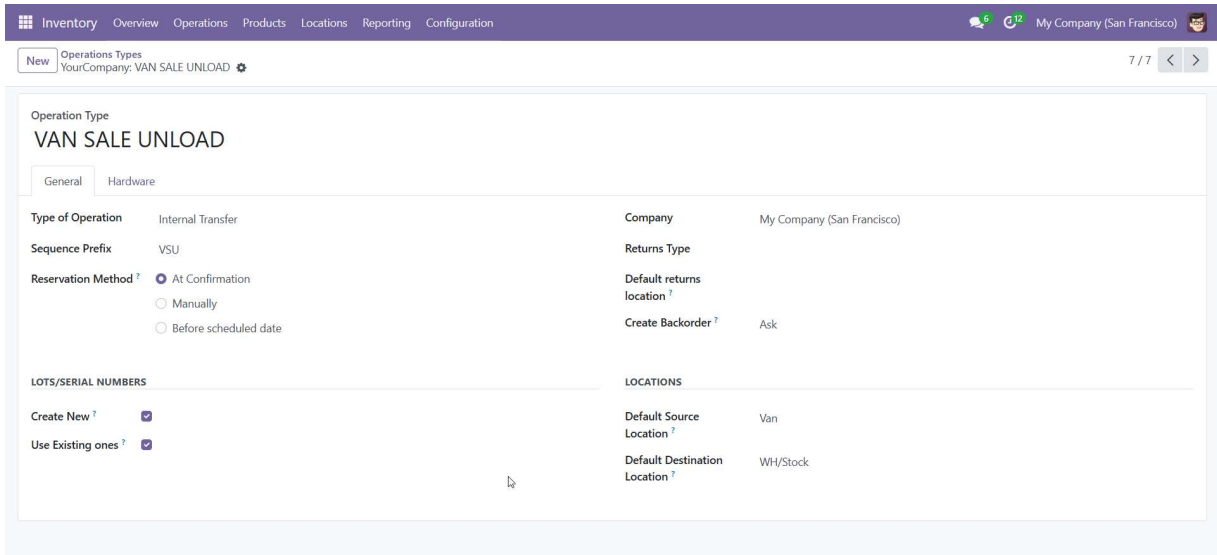


The screenshot shows the Odoo configuration interface for the 'VAN_SALE_LOAD' operation type. The breadcrumb trail is 'Inventory > Overview > Operations > Products > Locations > Reporting > Configuration'. The page title is 'New Operations Types YourCompany: VAN_SALE_LOAD'. The configuration is divided into 'General' and 'Hardware' tabs, with 'General' selected. The 'Type of Operation' is 'Internal Transfer'. The 'Sequence Prefix' is 'VSL'. The 'Reservation Method' is 'At Confirmation'. The 'Company' is 'My Company (San Francisco)'. The 'Returns Type' is 'Default returns location'. The 'Create Backorder' is 'Ask'. The 'LOTS/SERIAL NUMBERS' section has 'Create New' and 'Use Existing ones' both checked. The 'LOCATIONS' section has 'Default Source Location' as 'WH/Stock' and 'Default Destination Location' as 'Van'.

Field	Value
Type of Operation	Internal Transfer
Sequence Prefix	VSL
Reservation Method	At Confirmation
Company	My Company (San Francisco)
Returns Type	Default returns location
Create Backorder	Ask
LOTS/SERIAL NUMBERS	
Create New	<input checked="" type="checkbox"/>
Use Existing ones	<input checked="" type="checkbox"/>
LOCATIONS	
Default Source Location	WH/Stock
Default Destination Location	Van

Screenshot 9: Van point of sale operation type - VAN_SALE_UNLOAD:

- This operation type is for stock move of unsold products from VAN to Warehouse locations after sales.



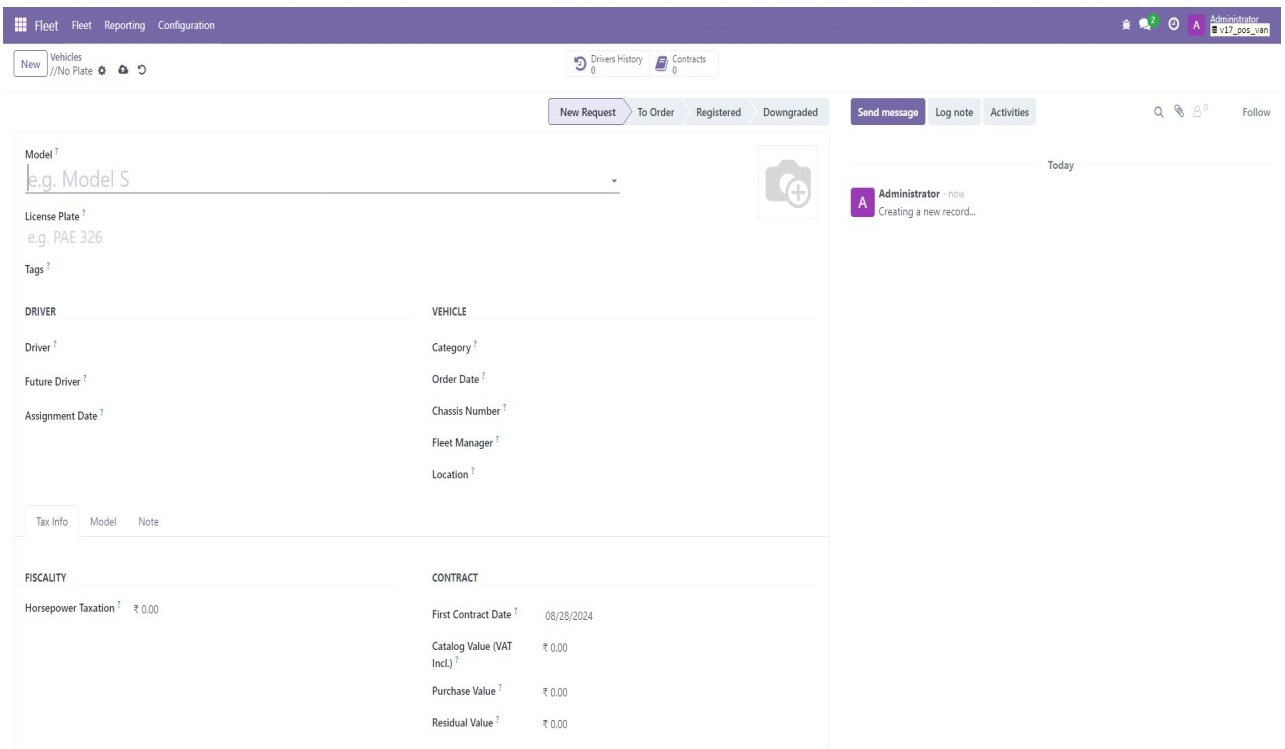
The screenshot shows the Odoo configuration page for the 'VAN SALE UNLOAD' operation type. The page is titled 'Operation Type VAN SALE UNLOAD' and has two tabs: 'General' and 'Hardware'. The 'General' tab is active. The configuration is organized into several sections:

- Type of Operation:** Internal Transfer
- Sequence Prefix:** VSU
- Reservation Method:** At Confirmation, Manually, Before scheduled date
- LOTS/SERIAL NUMBERS:** Create New, Use Existing ones
- Company:** My Company (San Francisco)
- Returns Type:** (empty)
- Default returns location:** (empty)
- Create Backorder:** Ask
- LOCATIONS:** Default Source Location: Van, Default Destination Location: WH/Stock

Screenshot 10: Create a Van in Fleet management:

- Go to *Fleet management* module.
- Click *New*.
- Enter *Driver, Fleet manager and other van details*-> *Save*.

Fleet manager is considered as the Salesman for the Van.



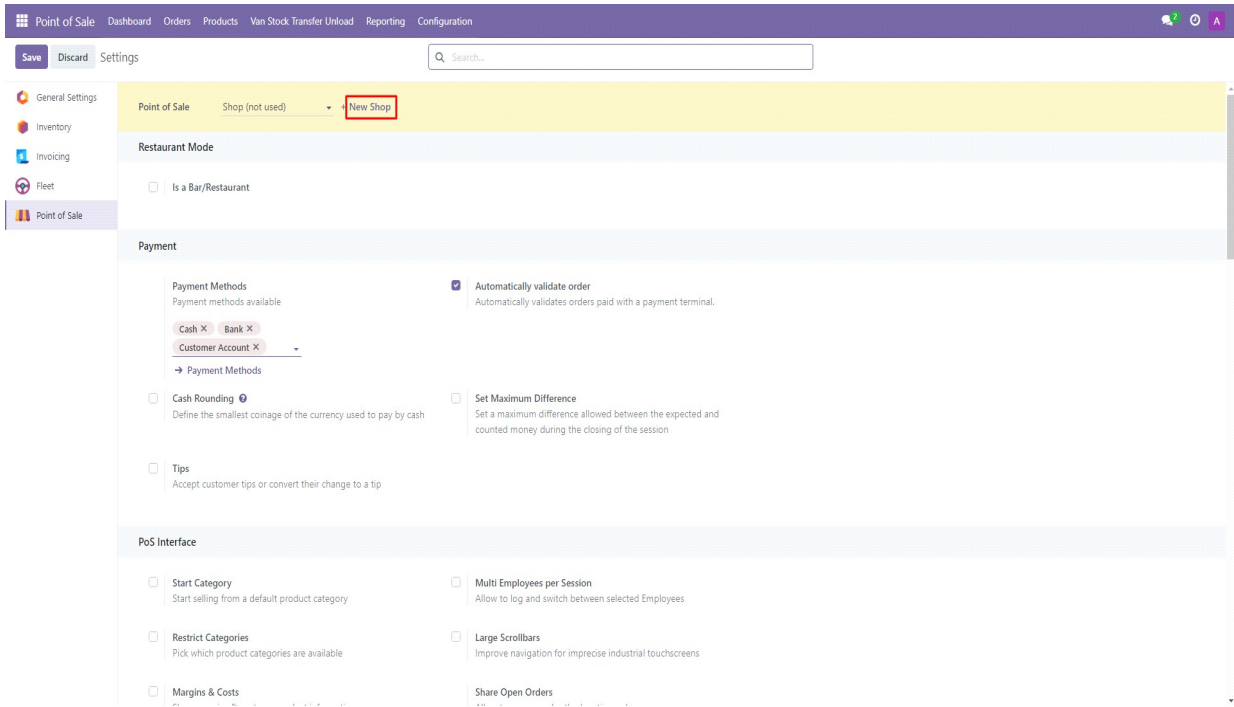
The screenshot shows the 'New' form for creating a vehicle in the Odoo Fleet management module. The form is divided into several sections:

- Model:** A search field with the placeholder 'e.g. Model S'.
- License Plate:** A search field with the placeholder 'e.g. PAE 326'.
- Tags:** A section for adding tags.
- DRIVER:** Fields for 'Driver', 'Future Driver', and 'Assignment Date'.
- VEHICLE:** Fields for 'Category', 'Order Date', 'Chassis Number', 'Fleet Manager', and 'Location'.
- Tax Info:** A tabbed section with 'Model' and 'Note' sub-sections.
- FISCALITY:** A section for 'Horsepower Taxation' (€ 0.00).
- CONTRACT:** Fields for 'First Contract Date' (08/28/2024), 'Catalog Value (VAT Incl.)' (€ 0.00), 'Purchase Value' (€ 0.00), and 'Residual Value' (€ 0.00).

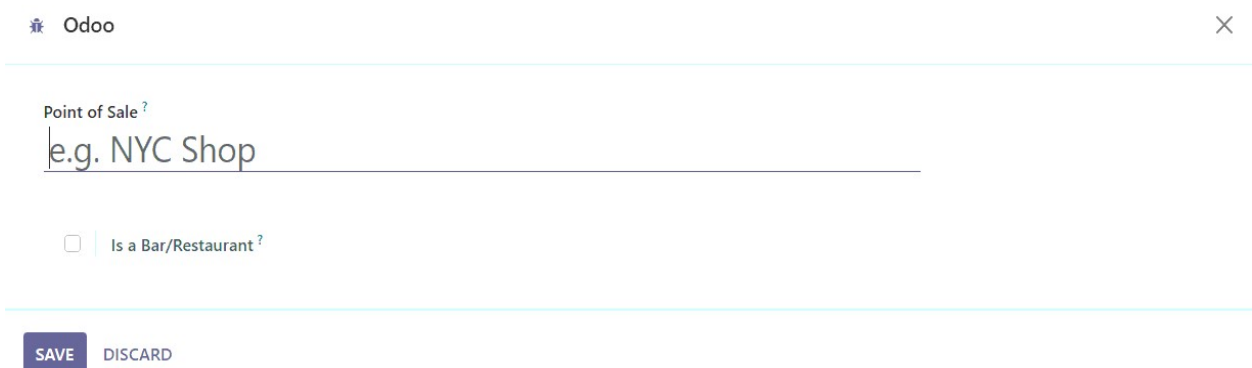
The top navigation bar includes 'Fleet', 'Fleet Reporting', and 'Configuration'. The right sidebar shows a notification from 'Administrator' with the message 'Creating a new record...'. The bottom navigation bar has tabs for 'New Request', 'To Order', 'Registered', and 'Downgraded'.

Screenshot 11: Create a new Point of Sale:

- Go to *Settings -> Point of Sale.*
- Click on *New Shop.*

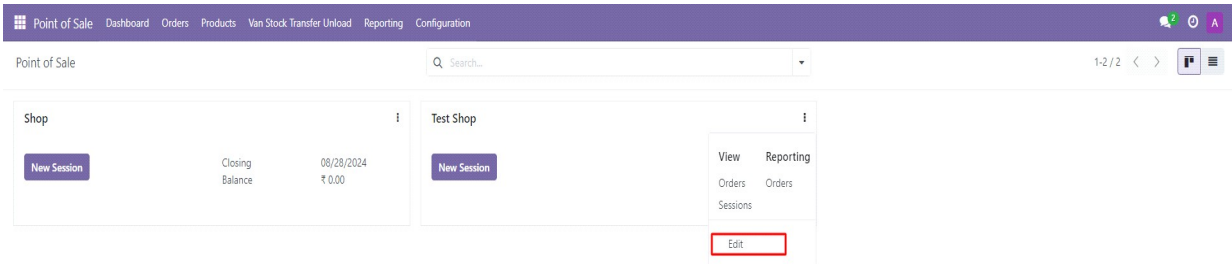


Screenshot 12: Enter new POS details:



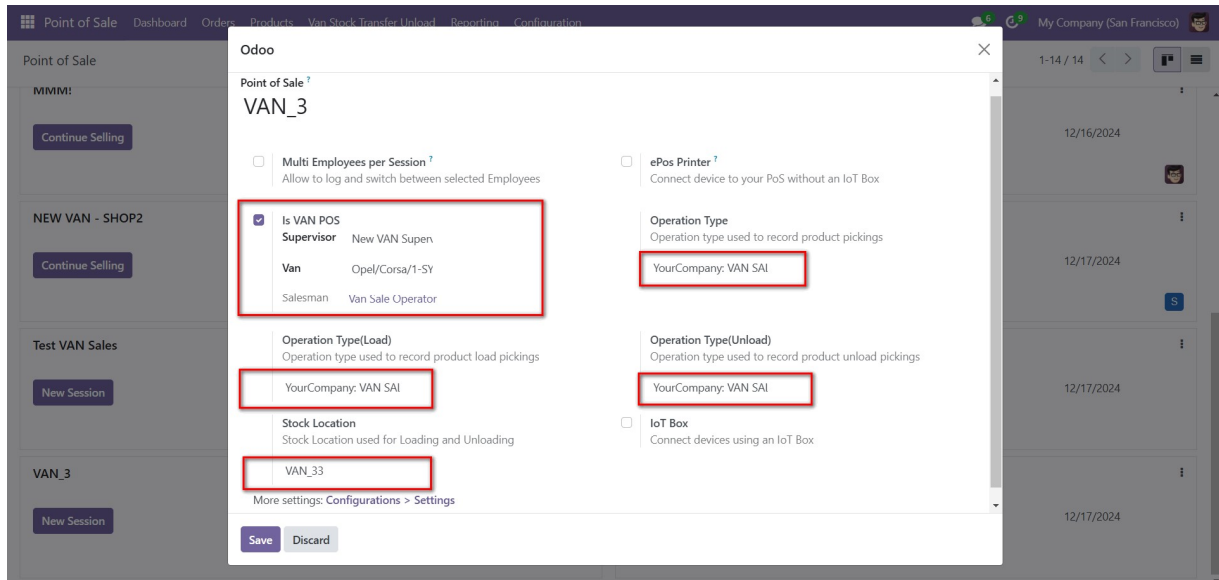
Screenshot 13: Edit new POS:

- Go to *POS module*.
- Click on three-dot menu of new *POS* -> *Edit*.

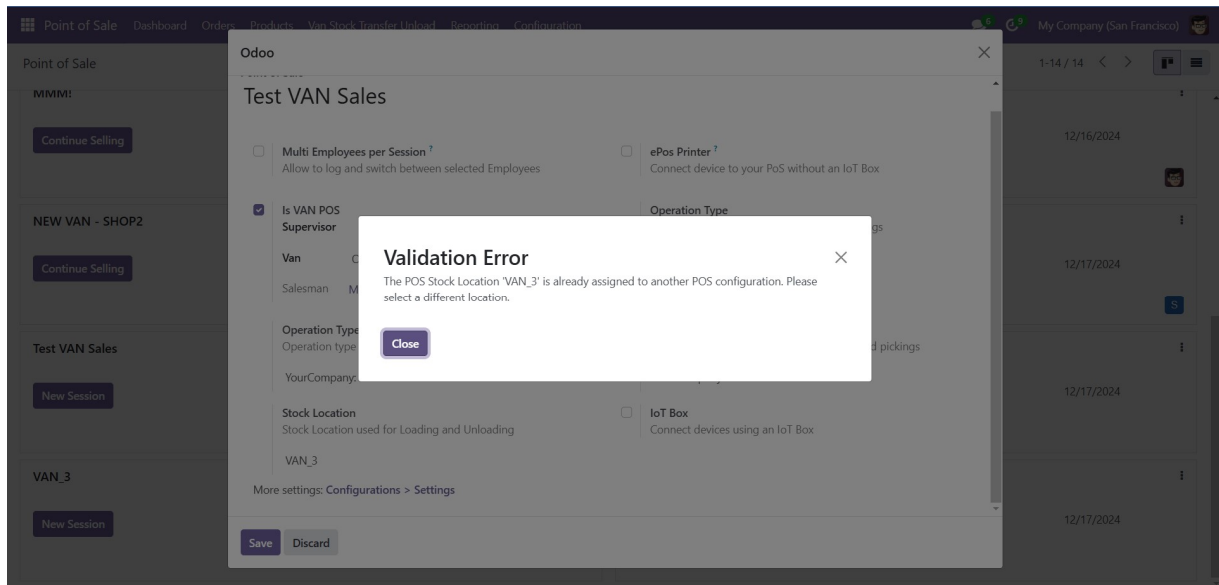


Screenshot 14: Configure new POS to Van Sale POS:

- Enable *Is Van POS* checkbox.
- Add a van to the POS.
- Add *VAN_SALE, VAN_SALE_LOAD, VAN_SALE_UNLOAD* operation types to the Shop. These will be loaded by default if *Is VAN POS* is enabled
- Add Stock Location - Location added here will be considered as the Van Stock location for this POS and will be used for all stock transfers. Stock Location is mandatory for Van POS.
- Click *Save*.

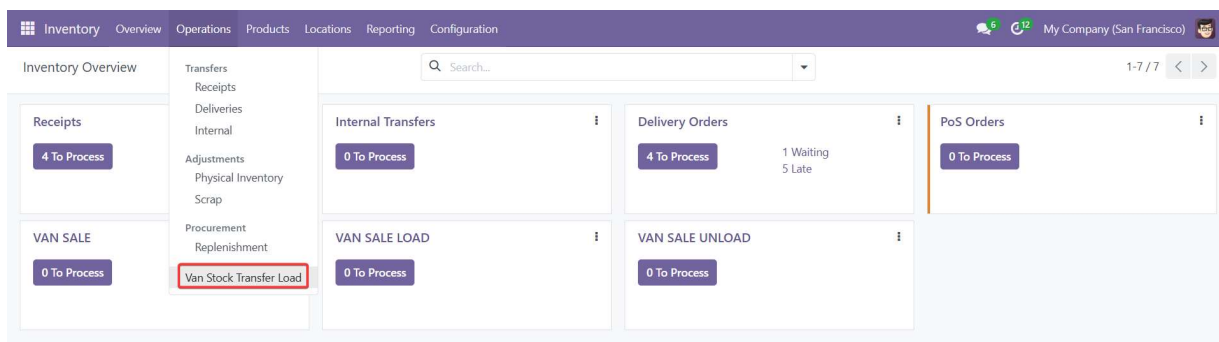


Screenshot 15: Validation displayed if same Van location is configured to more than one POS:



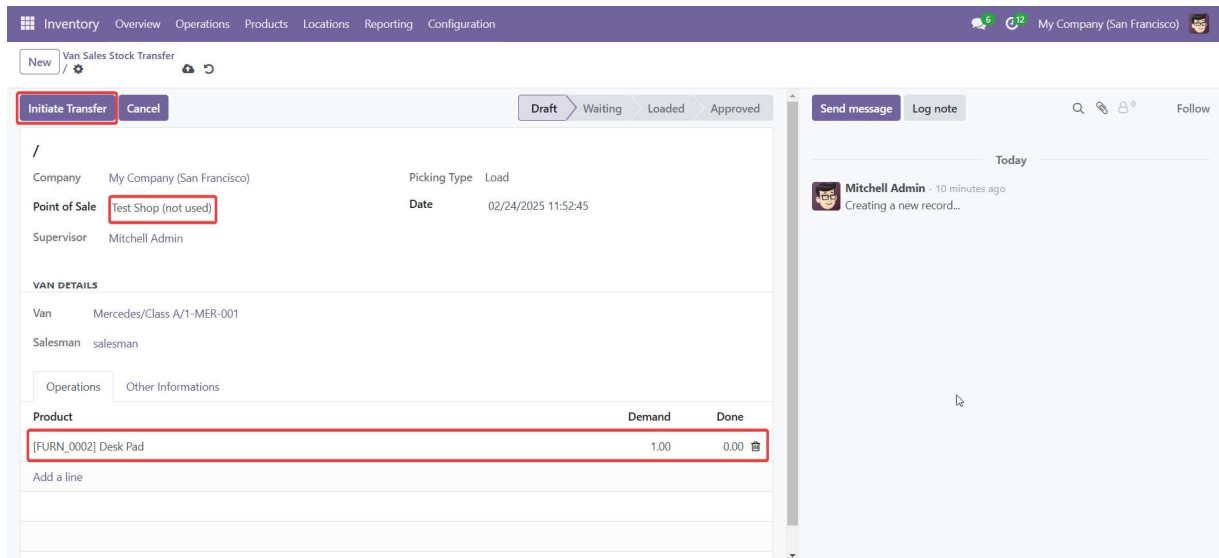
Screenshot 16: Van point of sale - Van Stock Transfer Load:

- Go to Inventory.
- Navigate to *Operations menu -> Select Van Stock Transfer* menu item.
- This process is defined under the operation type: *VAN_SALE_LOAD*.
- Van should be loaded with products before opening related POS session.



Screenshot 17: Van point of sale – Create Van Stock Transfer Load:

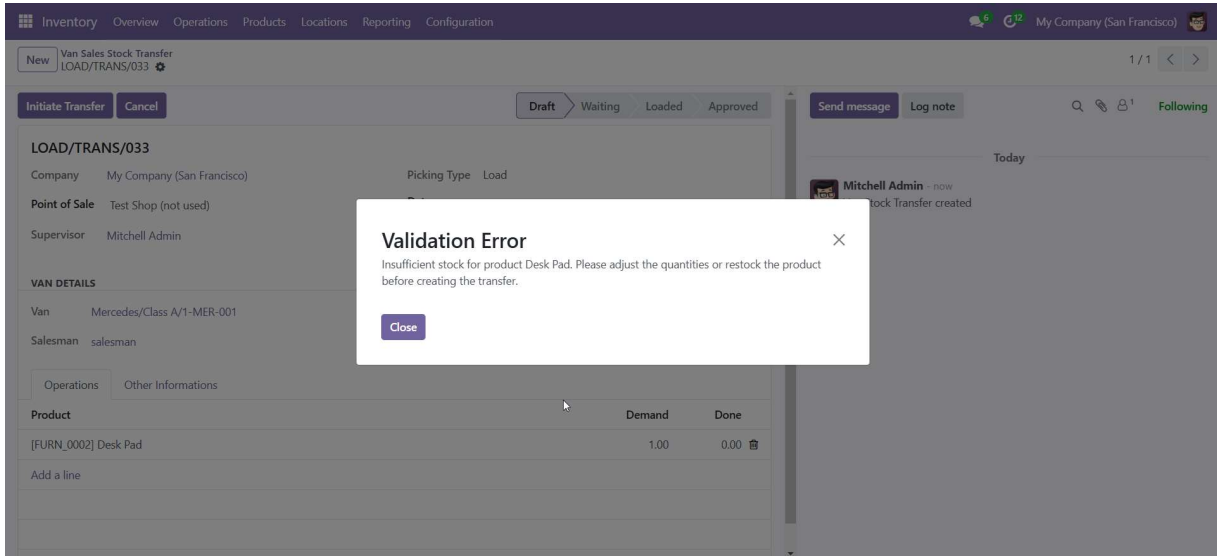
- Select a POS.
- Add products to the van – Van stock transfers are restricted to storable products only.
- Click on *Initiate Transfer*.



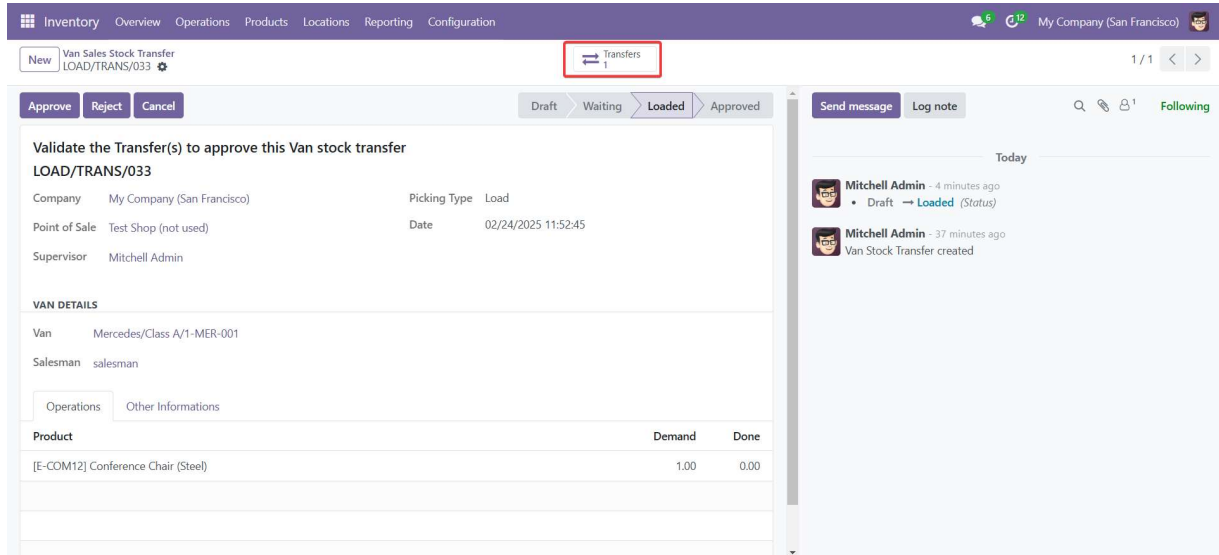
The screenshot displays the Odoo interface for creating a Van Stock Transfer Load. The top navigation bar includes 'Inventory', 'Overview', 'Operations', 'Products', 'Locations', 'Reporting', and 'Configuration'. The user is logged in as 'My Company (San Francisco)'. The main form is titled 'New Van Sales Stock Transfer' and has a status of 'Draft'. The 'Initiate Transfer' button is highlighted with a red box. The form fields include: Company: My Company (San Francisco); Picking Type: Load; Point of Sale: Test Shop (not used) (highlighted with a red box); Date: 02/24/2025 11:52:45; Supervisor: Mitchell Admin. The 'VAN DETAILS' section shows: Van: Mercedes/Class A/1-MER-001; Salesman: salesman. Below this is a table with columns 'Product', 'Demand', and 'Done'. The table contains one row: '[FURN_0002] Desk Pad' with a demand of 1.00 and a done quantity of 0.00. The table is highlighted with a red box. The right sidebar shows a chat window with a message from Mitchell Admin: 'Creating a new record...'

Screenshot 18: When we do not have enough stock for the Product it will not let us initiate the transfer, it will raise validation.

- *While initiating the transfer.*

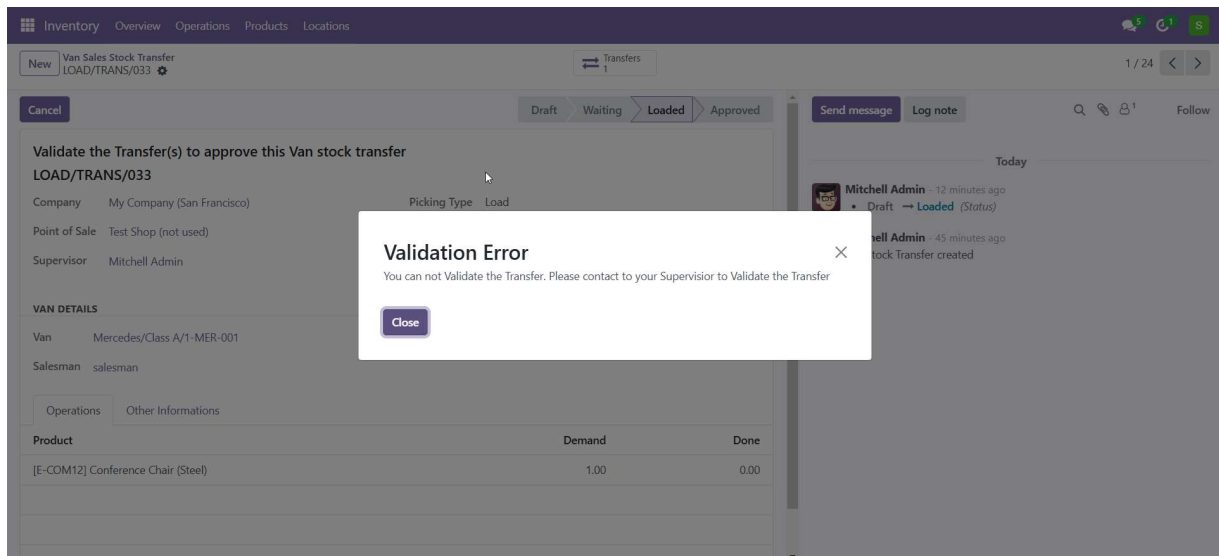


Screenshot 19: Van point of sale – View the created transfer if we have enough stock then transfer will be initiated:



Screenshot 20: Van point of sale – logged in as a salesman.

- *If you are logged in as salesman, you cannot validate the transfer.*
- *For validating the transfer, you need to contact to your supervisor.*

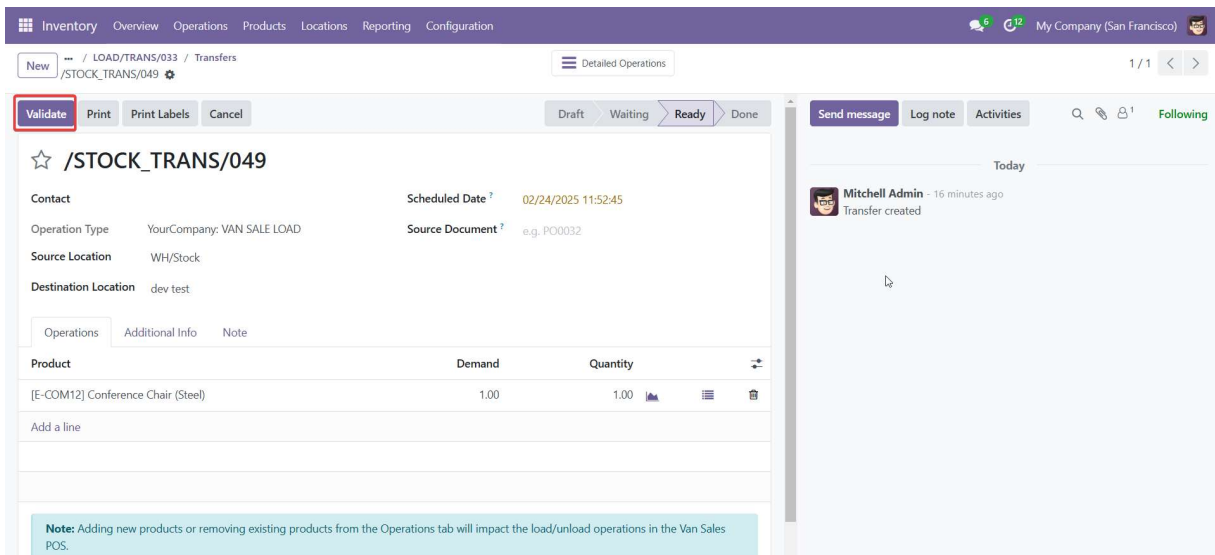


- *Each salesman can see only his/her Records.*

Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
02/24/2025 11:52:45	LOAD/TRANS/033	Load	Test Shop (not used)	Mitchell Admin	Mercedes/Class A/1-MER-001	salesman	Loaded
02/21/2025 12:43:55	UNLOAD/TRANS/032	Unload	Van Sale Test (Mitchell Admin)	Mitchell Admin	Audi/A1/VANSALE	salesman	Approved
02/21/2025 12:40:59	LOAD/TRANS/031	Load	Van Sale Test (Mitchell Admin)	Mitchell Admin	Audi/A1/VANSALE	salesman	Running
02/21/2025 12:32:00	LOAD/TRANS/030	Load	Van Sale Test (Mitchell Admin)	Mitchell Admin	Audi/A1/VANSALE	salesman	Completed
01/14/2025 16:19:39	LOAD/TRANS/029	Load	U shop (not used)	Supervisor	Bmw/Serie 1/1-BMW-001	salesman	Draft
01/14/2025 14:54:43	LOAD/TRANS/027	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Cancelled
12/31/2024 14:02:51	LOAD/TRANS/026	Load	Regression (Mitchell Admin)	Supervisor	Bmw/Serie 1/1-BMW-001	salesman	Running
12/24/2024 17:56:50	LOAD/TRANS/021	Load	U shop (not used)	Supervisor	Bmw/Serie 1/1-BMW-001	salesman	Approved
12/24/2024 15:09:59	LOAD/TRANS/018	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Completed
12/24/2024 15:05:28	LOAD/TRANS/017	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Completed
12/24/2024 15:04:47	UNLOAD/TRANS/016	Unload	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Completed
12/24/2024 14:58:24	LOAD/TRANS/015	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Completed
12/24/2024 14:57:50	LOAD/TRANS/014	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Cancelled
12/24/2024 12:07:02	LOAD/TRANS/013	Load	Star Shop (not used)	Supervisor	Mercedes/Class A/1-MER-001	salesman	Completed

Screenshot 21: Van point of sale – Validate transfer:

- *Only Supervisor can validate the transfer.*



The screenshot shows the Odoo interface for a transfer record. The 'Validate' button is highlighted with a red box. The record details include:

- Contact:** /STOCK_TRANS/049
- Scheduled Date:** 02/24/2025 11:52:45
- Operation Type:** YourCompany: VAN SALE LOAD
- Source Document:** e.g. PO0032
- Source Location:** WH/Stock
- Destination Location:** dev test

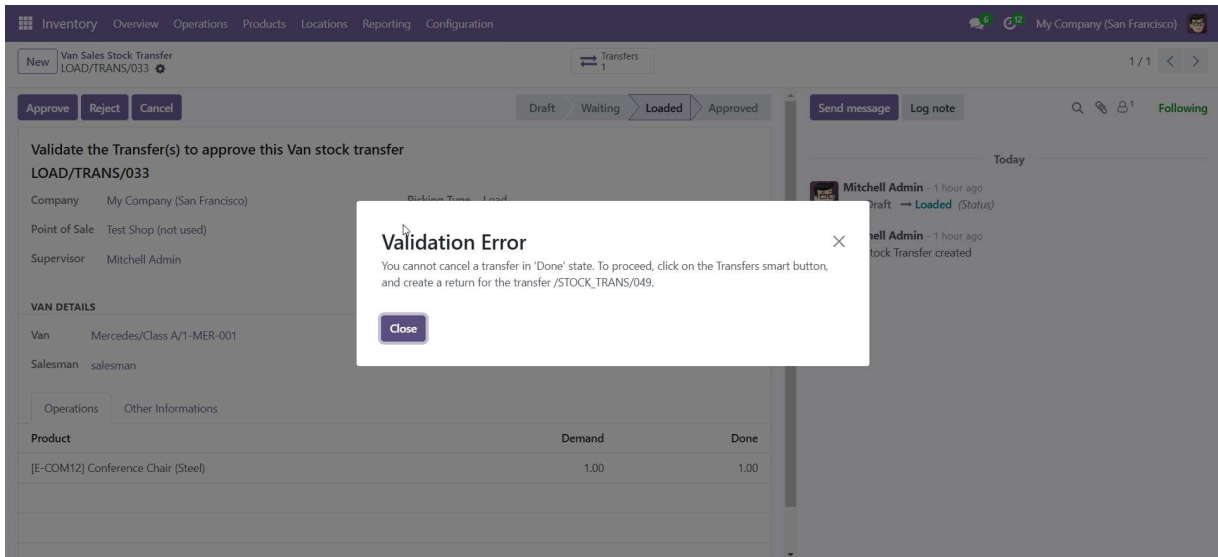
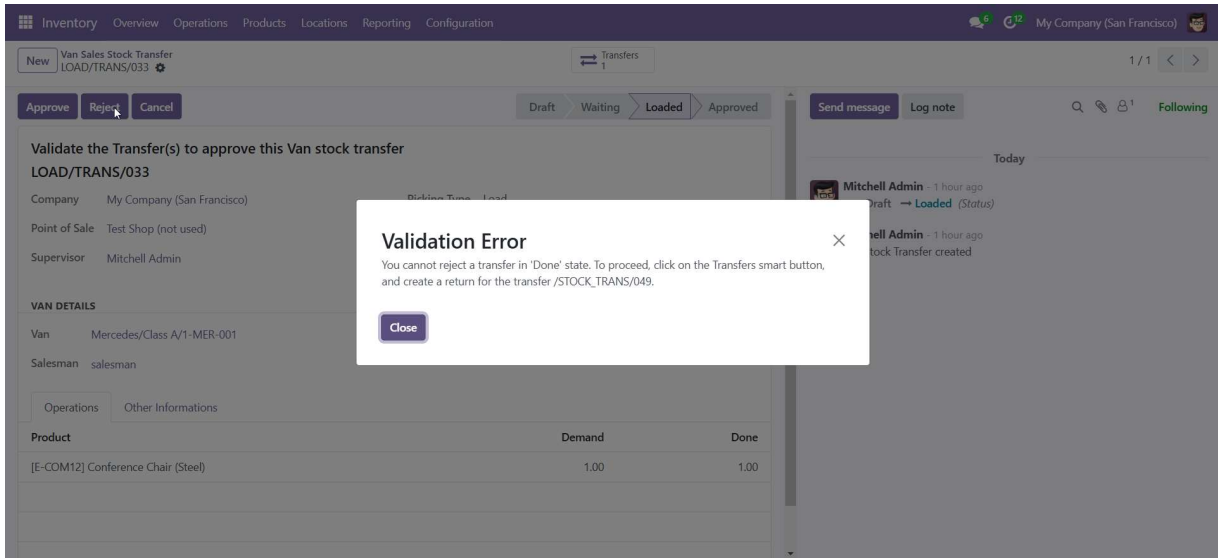
The product list shows:

Product	Demand	Quantity
[E-COM12] Conference Chair (Steel)	1.00	1.00

A note at the bottom states: "Note: Adding new products or removing existing products from the Operations tab will impact the load/unload operations in the Van Sales POS."

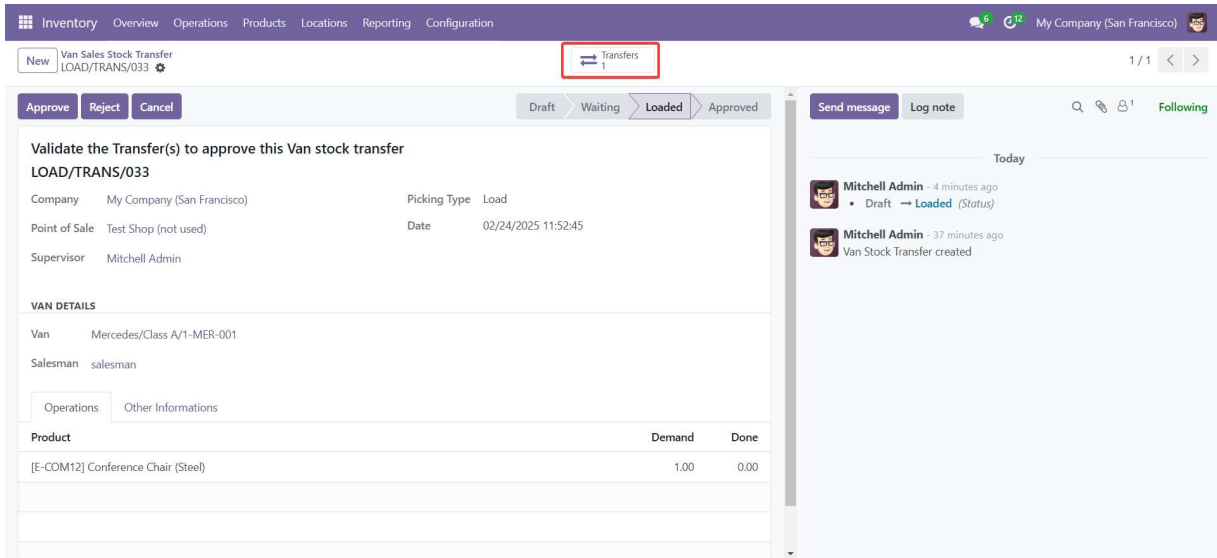
Screenshot 22: Before 'Approve' If we want to reject or cancel the Transfer - Once transfer is validated you cannot reject and cancel the load it will raise validation.

- Go back to *Load Transfer* record.
- Click on *Reject* and *Cancel*.



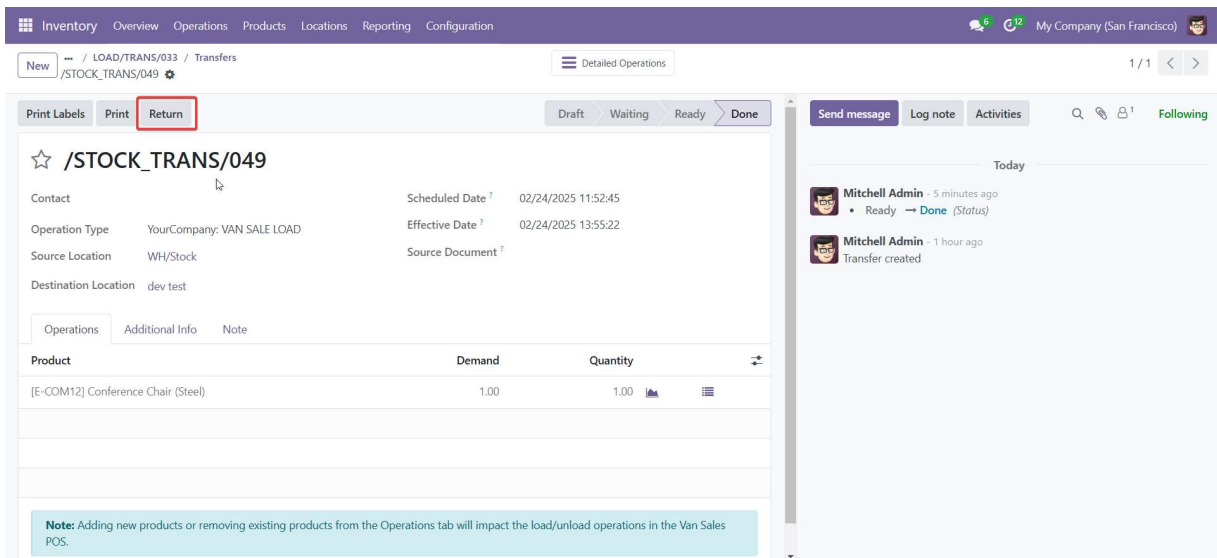
Screenshot 23: In case of Reject and Cancel getting stock back to Warehouse – Create Return.

- Click on *Transfers* smart button.
- Go to *Transfers*.



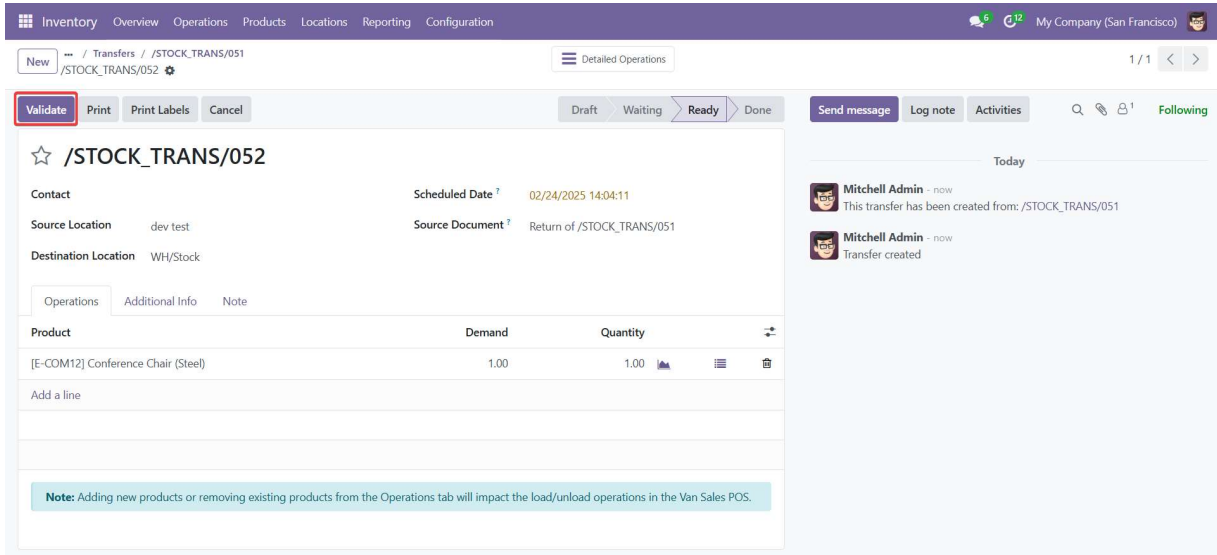
Screenshot 24: Create Return:

- Click on return button.



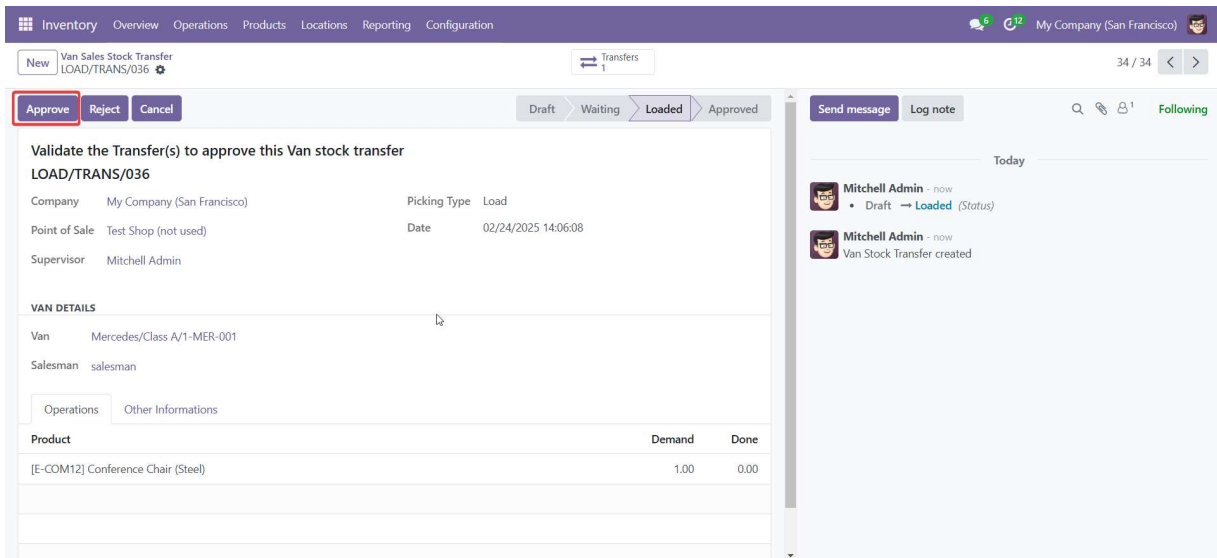
Screenshot 25: Validate the Return:

- Stock will be moved to warehouse.

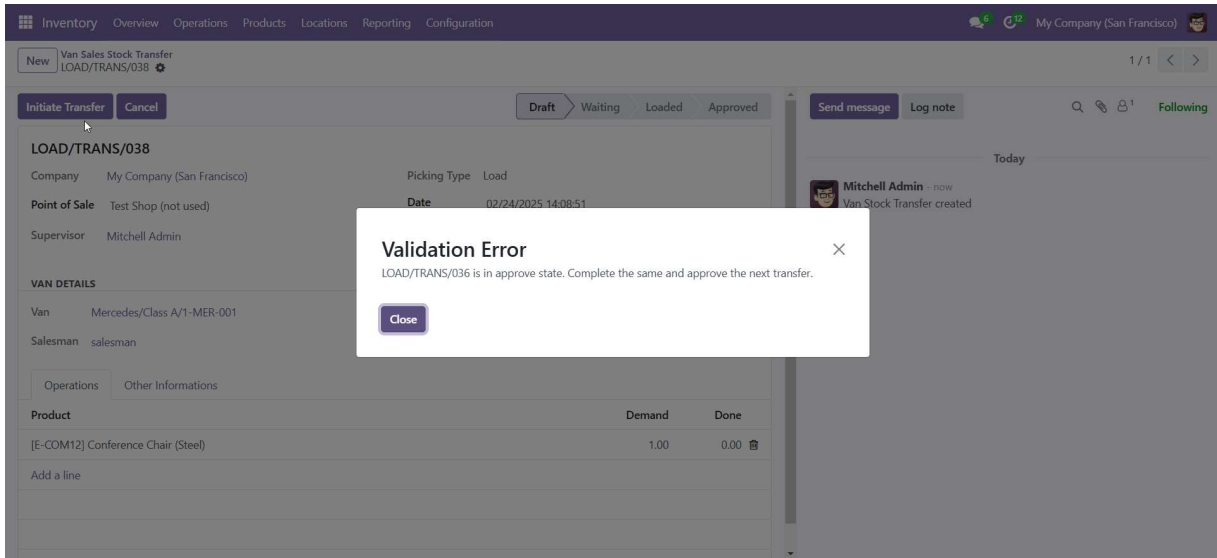


Screenshot 26: Van point of sale – Load Transfer Approval:

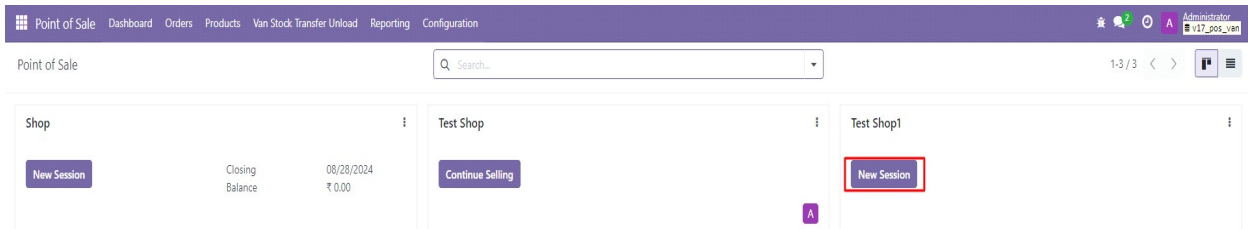
- Go back to *Load Transfer* record.
- Click *Approve*.
- Only Supervisor can approve the *Load Transfer*.



Screenshot 27: Once the Van Stock Transfer Load is approved then you cannot create another Van Stock Transfer Load for the same session it will raise validation. You need to complete the previous Load.

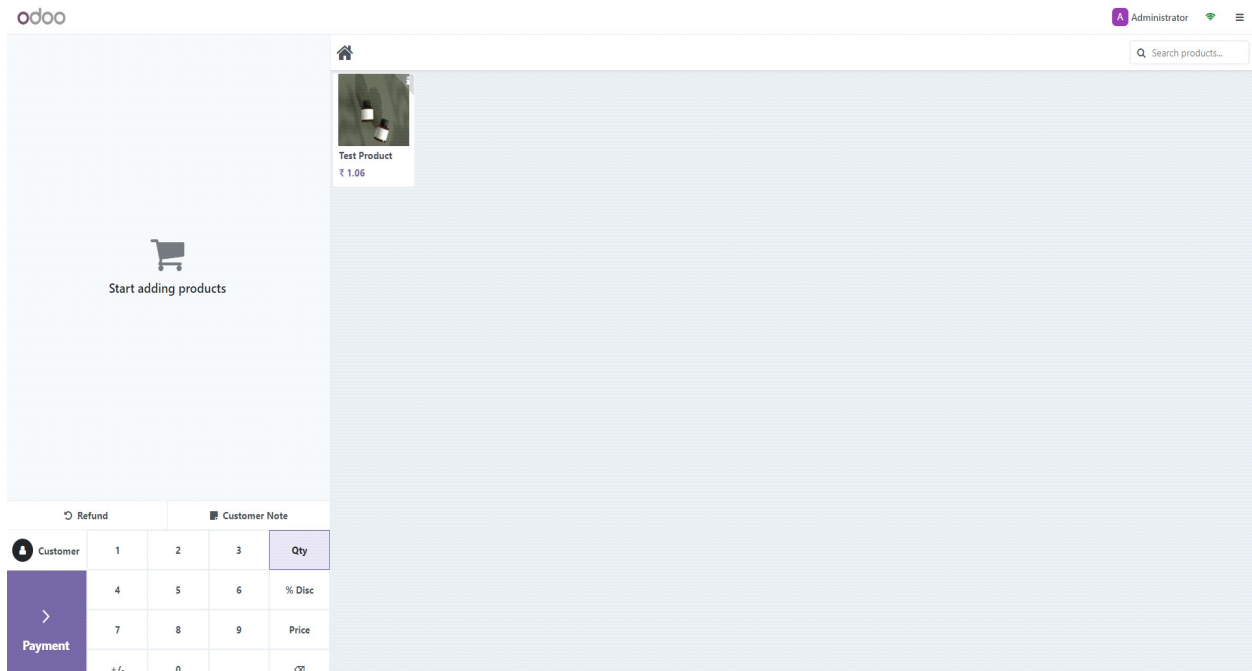


Screenshot 28: Van point of sale – Open new POS session:

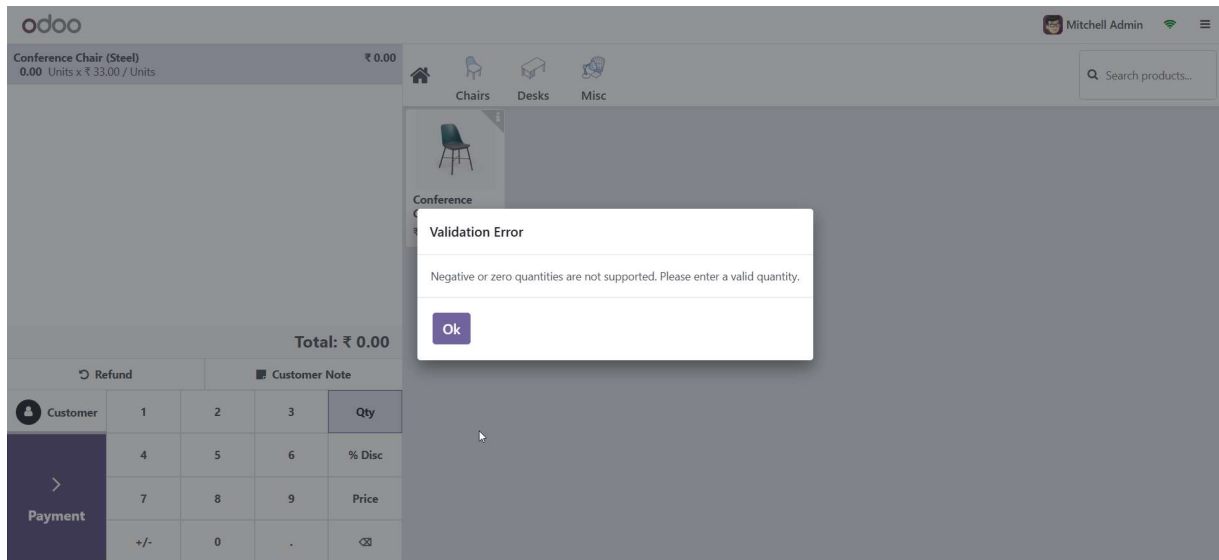


Screenshot 29: Van point of sale Sell the loaded products:

- Here Only Van Location Product will be visible.
- Click on product to add to cart.
- Click on *Payment*.

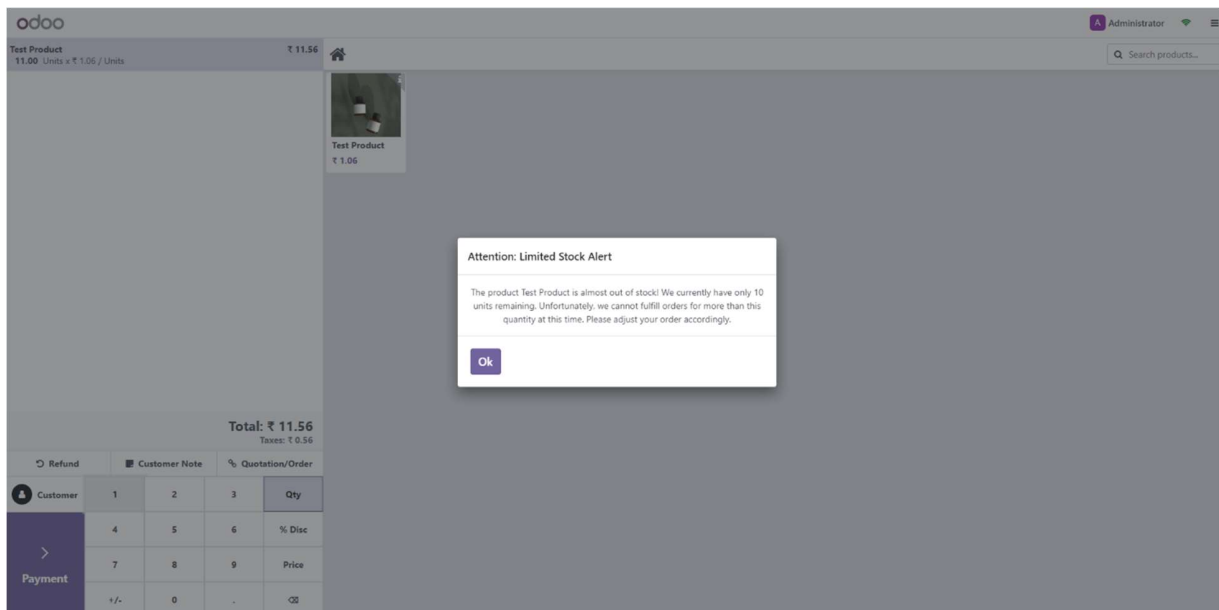


Screenshot 30: Negative or zero quantity is not allowed in Van Sale POS and validation message will be raised:



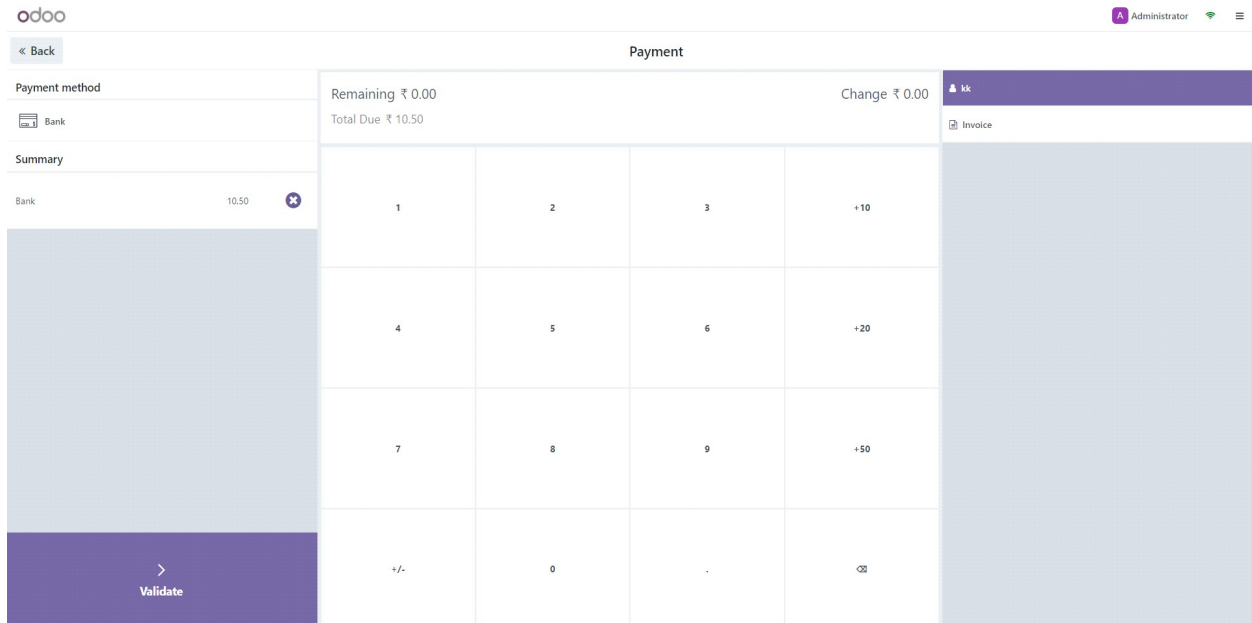
Screenshot 31: Van point of sale, Sell the loaded products

- *If we want to Sell more than available quantity in Stock, it will not let us sell more than available quantity in Stock.*



Screenshot 32: Van point of sale, Sell the loaded products:

- Select any payment method – Bank/Cash.
- Validate payment.

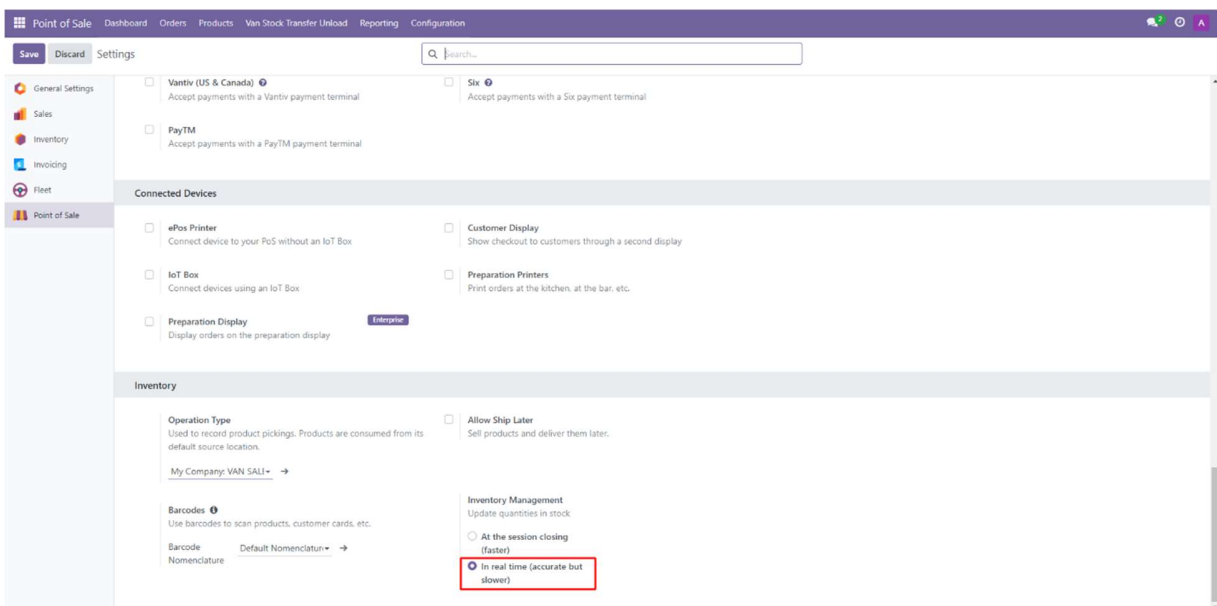
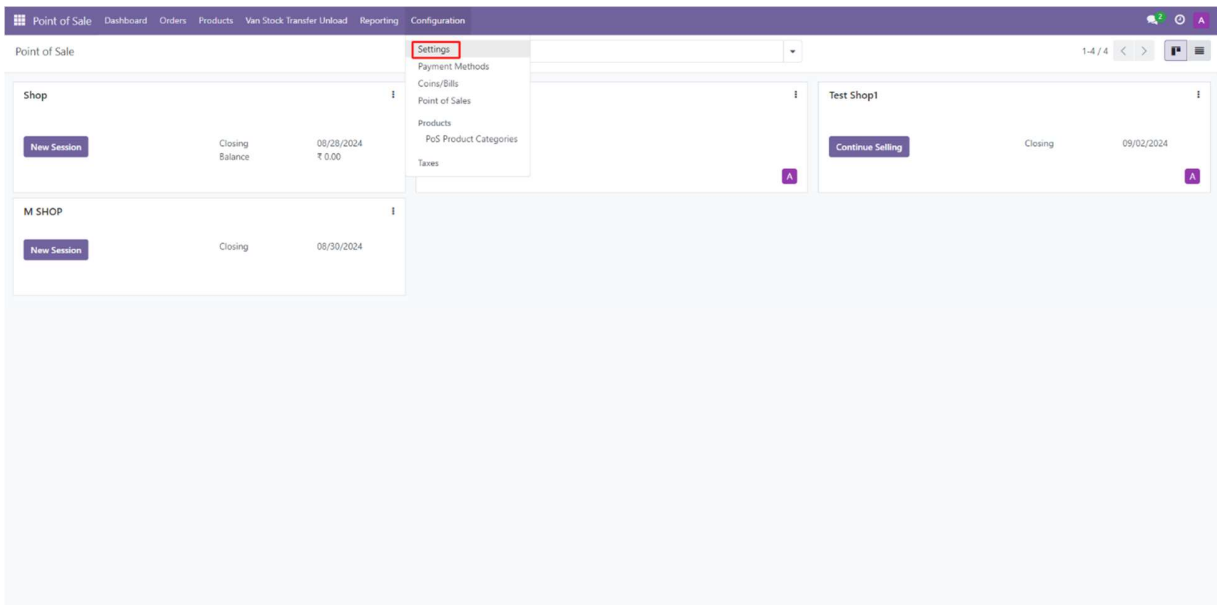


The screenshot shows the Odoo POS interface for a payment screen. The title is "Payment". At the top left, there is a "Back" button. The top right shows the user "Administrator" and a menu icon. Below the title, there are two summary boxes: "Payment method" showing "Bank" and "Summary" showing "Bank: 10.50". To the right of these, it says "Remaining ₹ 0.00" and "Total Due ₹ 10.50". Further right, it says "Change ₹ 0.00" and "Invoice". The main area contains a table with 4 columns and 5 rows. The bottom of the screen has a purple bar with a "Validate" button.

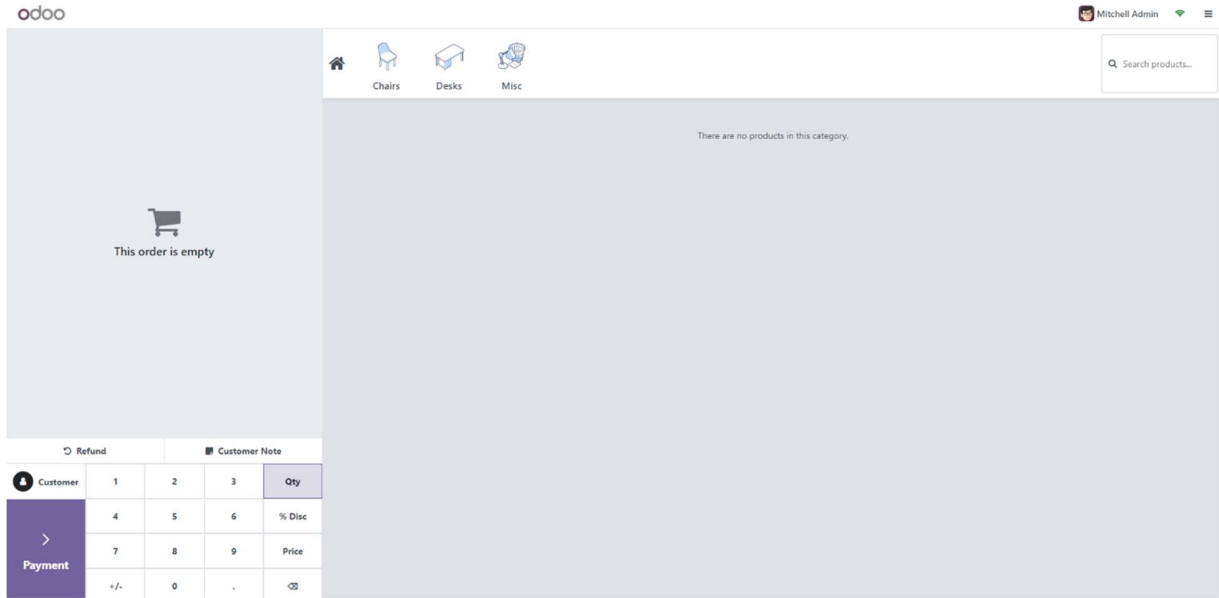
1	2	3	+10
4	5	6	+20
7	8	9	+50
+/-	0	.	∞

Screenshot 33: For real time stock update:

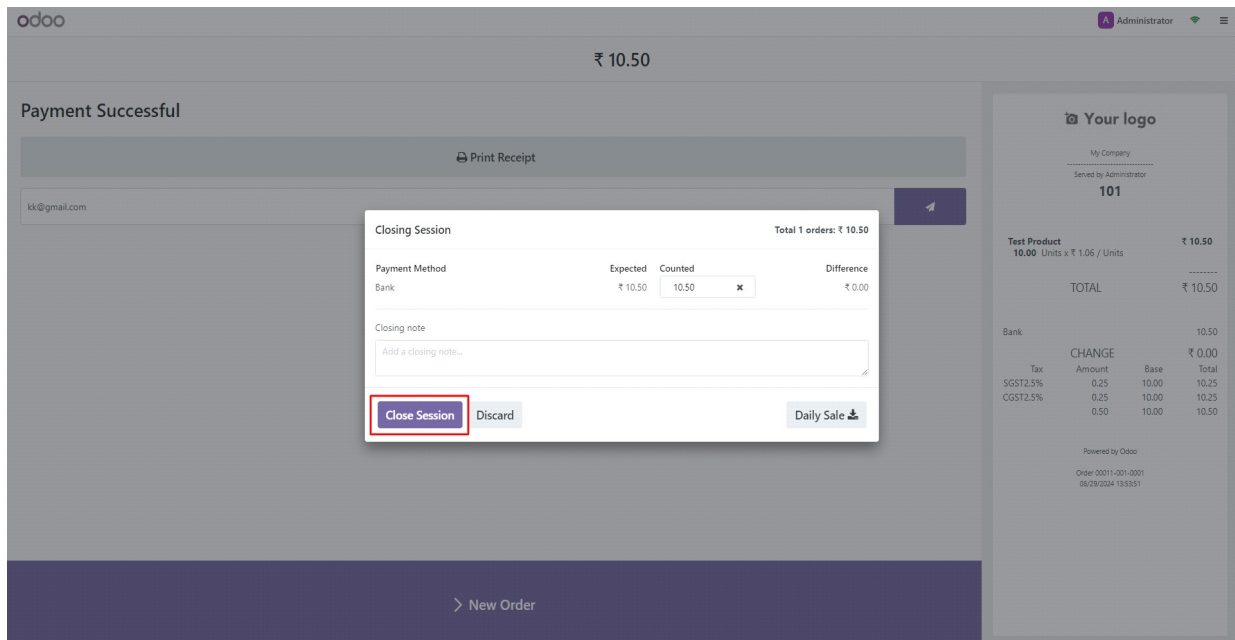
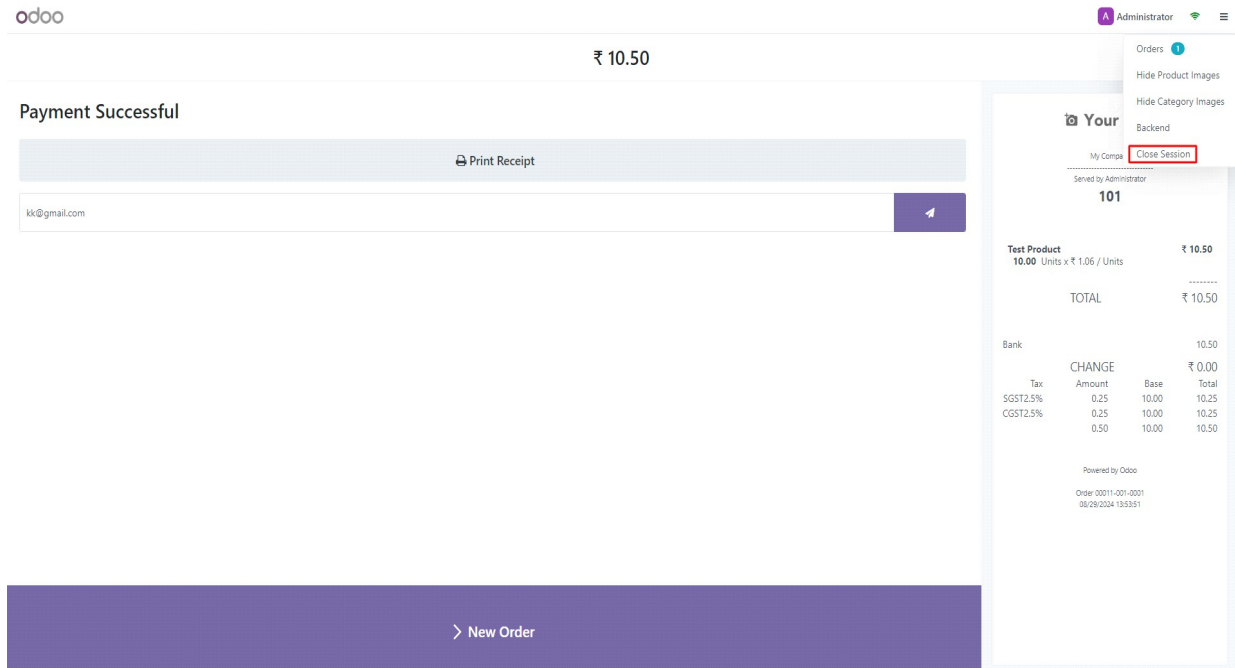
- *Activate Developer mode from Settings as in Screenshot 1*
- *Go to POS*
- *Click Configuration menu.*
- *Click the Settings menu.*
- *Select In real time (accurate but slower) option.*



Screenshot 34: When all Loaded Products are Sold it will Updated stock in real time. if we go to product screen it will show Blanck because all the loaded items are sold.

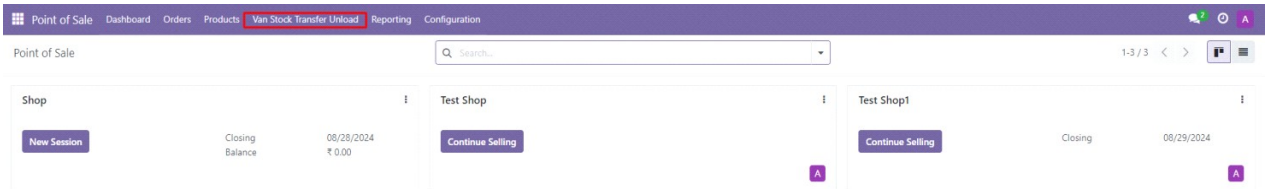


Screenshot 35: When all Loaded Products are Sold, in That case we do not have to create Unload, we can simply close the session. Stock will auto be updated.



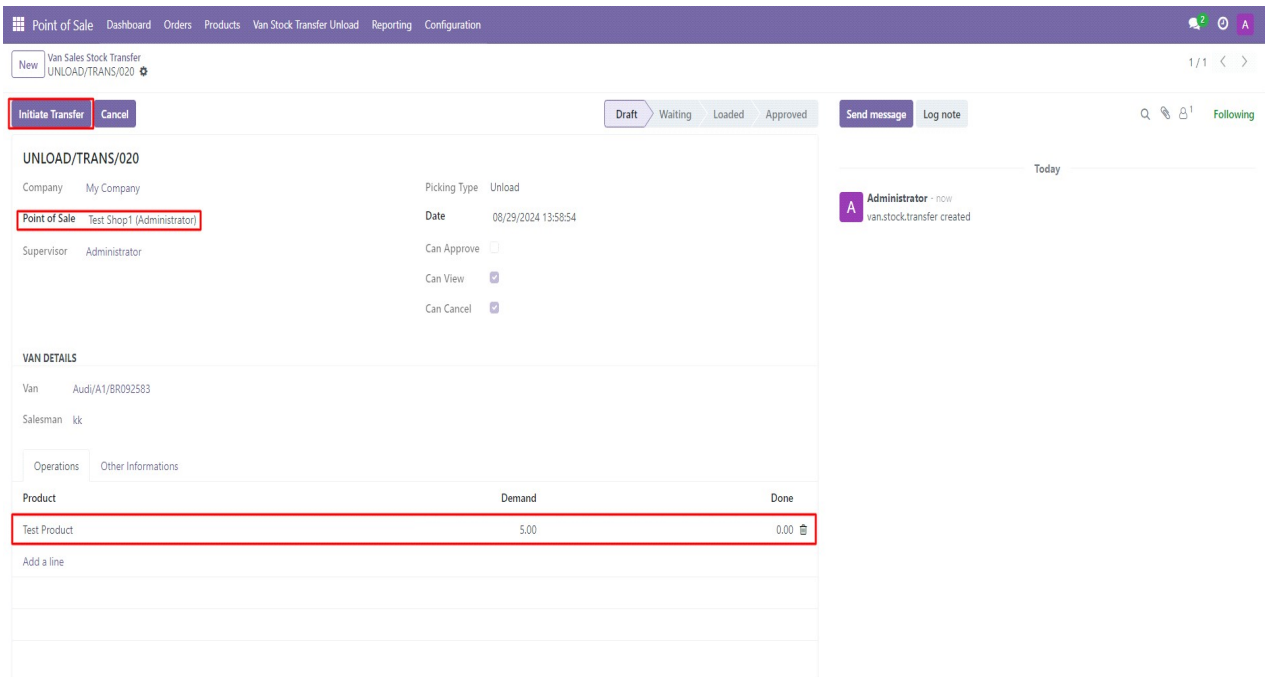
Screenshot 36: Van point of sale Unload transfer to move unsold products to warehouse:

- Go to *Point-of-Sale* module.
- Click on *Van Stock Transfer Unload*.



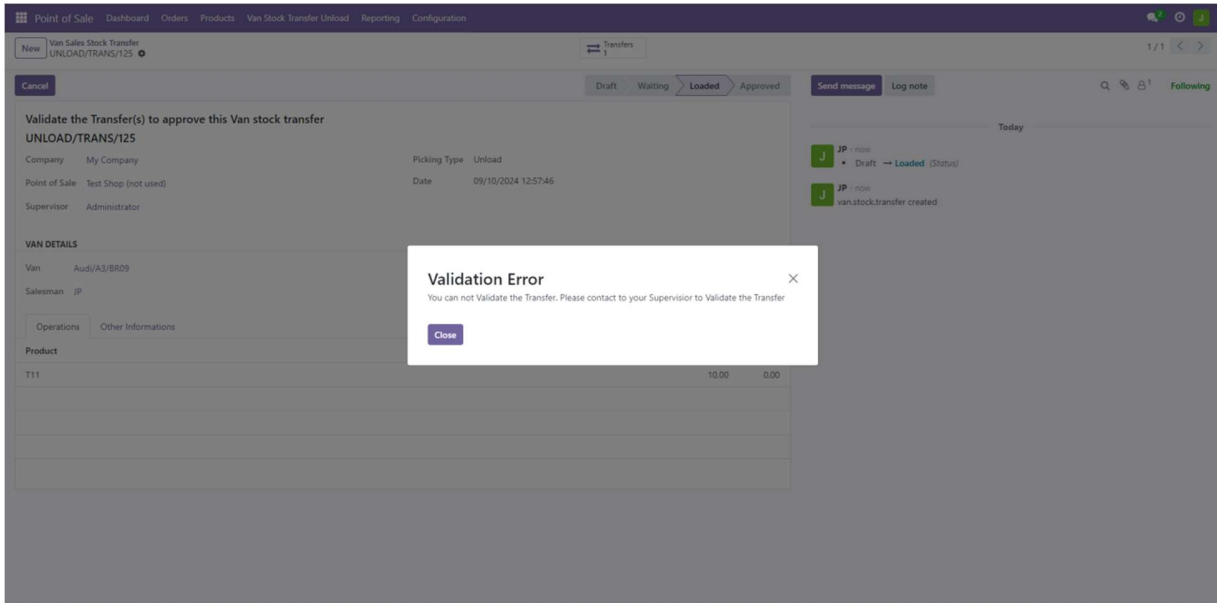
Screenshot 37: Van point of sale - Create an unload transfer:

- Create new unload transfer.
- Select POS -> Unsold products auto updated in line with remaining Quantity.
- Click *INITIATE TRANSFER*.



Screenshot 38: Van point of sale – If you logged in as salesman:

- If you are logged in as salesman, you cannot validate the transfer.
- For validating the transfer, you need to contact to your supervisor.



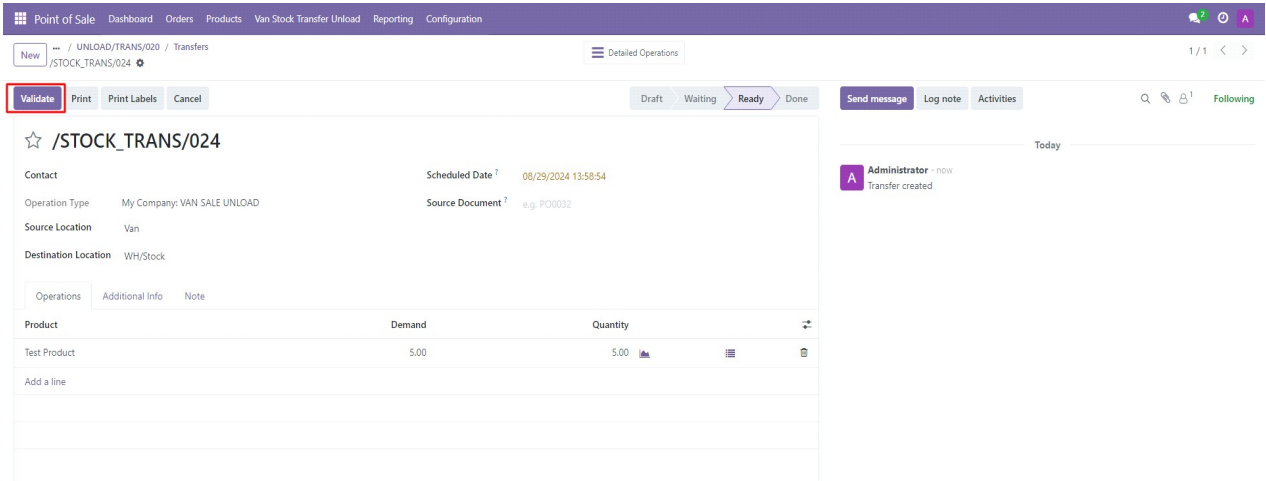
- *Each salesman can see only his/her unload Records.*

The screenshot shows the Odoo Inventory interface with a list of "Van Sales Stock Transfer" records. The "Salesman" column is highlighted with a red box, showing that only records for the logged-in salesman (JP) are visible.

Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
09/06/2024 15:00:10	LOAD/TRANS/123	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Draft
09/05/2024 16:56:37	LOAD/TRANS/121	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Approved
09/05/2024 15:17:19	LOAD/TRANS/112	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Loaded
09/05/2024 13:48:14	LOAD/TRANS/111	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Loaded
09/05/2024 13:47:09	LOAD/TRANS/110	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Draft
09/05/2024 13:39:12	LOAD/TRANS/103	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
09/05/2024 13:18:49	LOAD/TRANS/094	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
09/05/2024 12:31:59	UNLOAD/TRANS/093	Unload	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
08/28/2024 18:58:48	LOAD/TRANS/016	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed

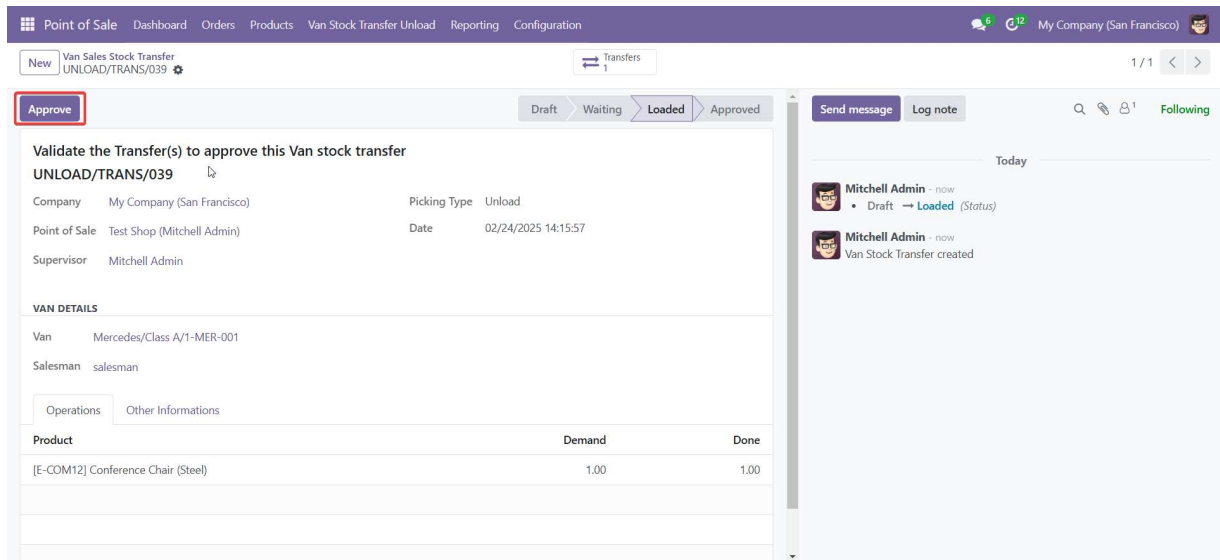
Screenshot 39: Van point of sale – Validate Product Transfer:

- *Only Supervisor can Validate the transfer.*



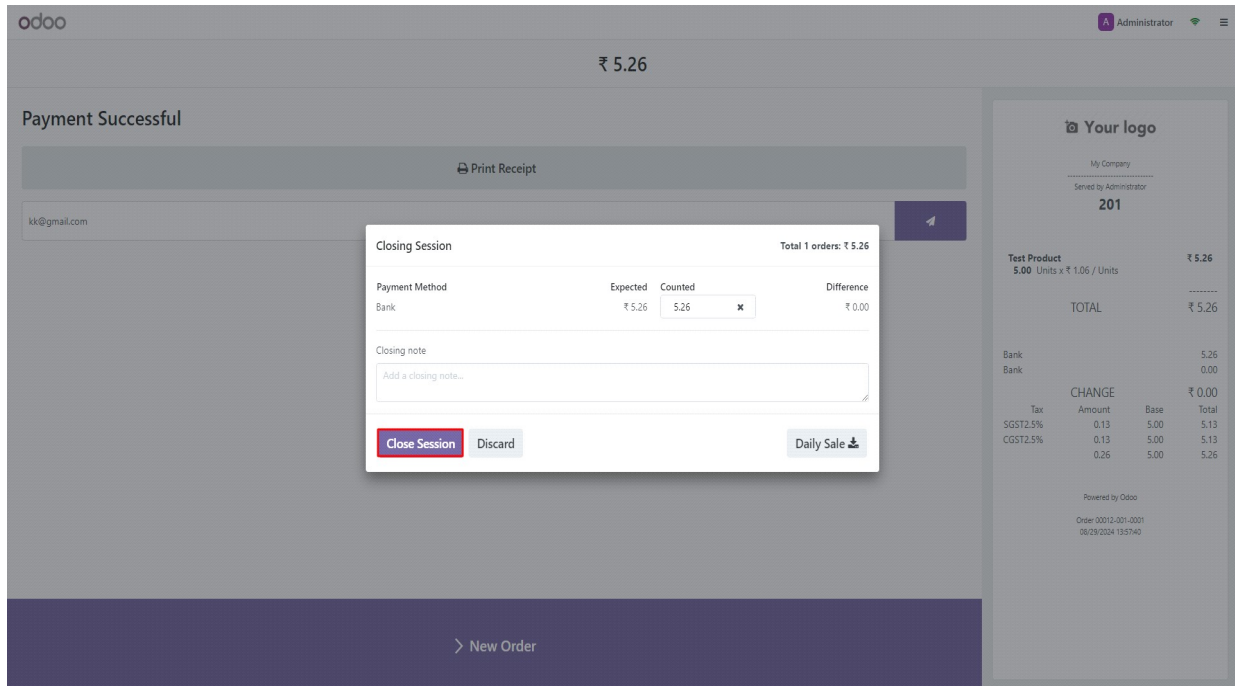
Screenshot 40: Van point of sale – Approve Unload Transfer:

- *Only Supervisor can Approve the transfer.*



Screenshot 41: Van point of sale – Close session:

- Click 'Close' in POS terminal.
- Rectify the cash differences.
- Click *Close Session*.



4. Brief Description

This module adds new features point of sale that are specific to VAN sale. Each van stock is recorded. Mainly two types of functions or operations take place, that can be said as loading operation and the unloading operation. And the two operations get recorded. This module mainly adds new features to the point-of-sale module. Here in this Van sale module mainly two user groups created manager and salesman. Where managers have all the access in modules, on the other hand the salesman only has certain access.

Initial step-by-step description

Step 1 - Install the module Van Point of Sale.

Step 2 - Goto inventory module and activate the settings option.

Step 3 - Set user groups for the corresponding users.

Step 4 - Add the location in the location setting.

Step 5 - Add the operation types in module inventory.

Step 6 - Then initiate the van stock transfer loading process.

Step 7 - The load should be validated before it is approved to transfer state.

Step 8 - The supervisor should give them access to transfer the load.

Step 9 - Then create a new point sale.

Step 10 - Ensure Operation Types are added in POS Config.

Step 11 - After sale we can close the sale session in the POS module.

Step 12 - If the product didn't get sold then we should make an unloading process then only we can close the session.

5. Technical Requirements / Compatible With:

- Technical Requirements: Odoo Point of Sale, Inventory, Fleet module.
- Compatible with: Odoo v17.0 Community and Enterprise Editions.

6. Changes Log / Release Notes

- Version 1.0.4: February 2025
 - Resolved some issues in displaying products that are not loaded to the POS.
 - Resolved issue in changing the operation type in POS config.
 - Users can now add the same product with different prices on separate lines in POS.
- Version 1.0.3: December 2024
 - Load transfers will now automatically move to a **Cancelled** or **Rejected** state if the Supervisor rejects the transfer after validation.
 - Unloading is no longer required for rejected transfers.
 - Resolved an issue where users encountered an error while closing a simple POS session.
 - Implemented restrictions to prevent sales with negative quantities in the POS Shop.
 - Fixed a stock discrepancy issue occurring when an unload transfer record is created in one window while simultaneously opening a session to sell items in another window.
 - Addressed the issue of incorrect stock updates when multiple POS sessions operate with the same Van location.

- Version 1.0.2: September 2024
 - System not let us sell more than available products in the current session's van location stock.
 - Real time stock updating.
 - Once all loaded Products are sold then product will be disappeared from the session.
 - Role access privilege set for salesman and supervisor.
- Version 1.0.1: August 2024
 - Automatic updating of product line while unloading operation.
 - Only Products in the Van location is visible in POS sale.
- Version 1.0.0: April 2023
 - Initial release.

7. Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com.