



User Manual

Van Sales POS Plugin v16

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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 few features to the point of sale that are specific to VAN sale. In this module all the products are stored in the warehouse which can be fully controlled by the module inventory. Here the process starts the loading of products into the van and the process ends at the time of unloading the unsold products from the van.

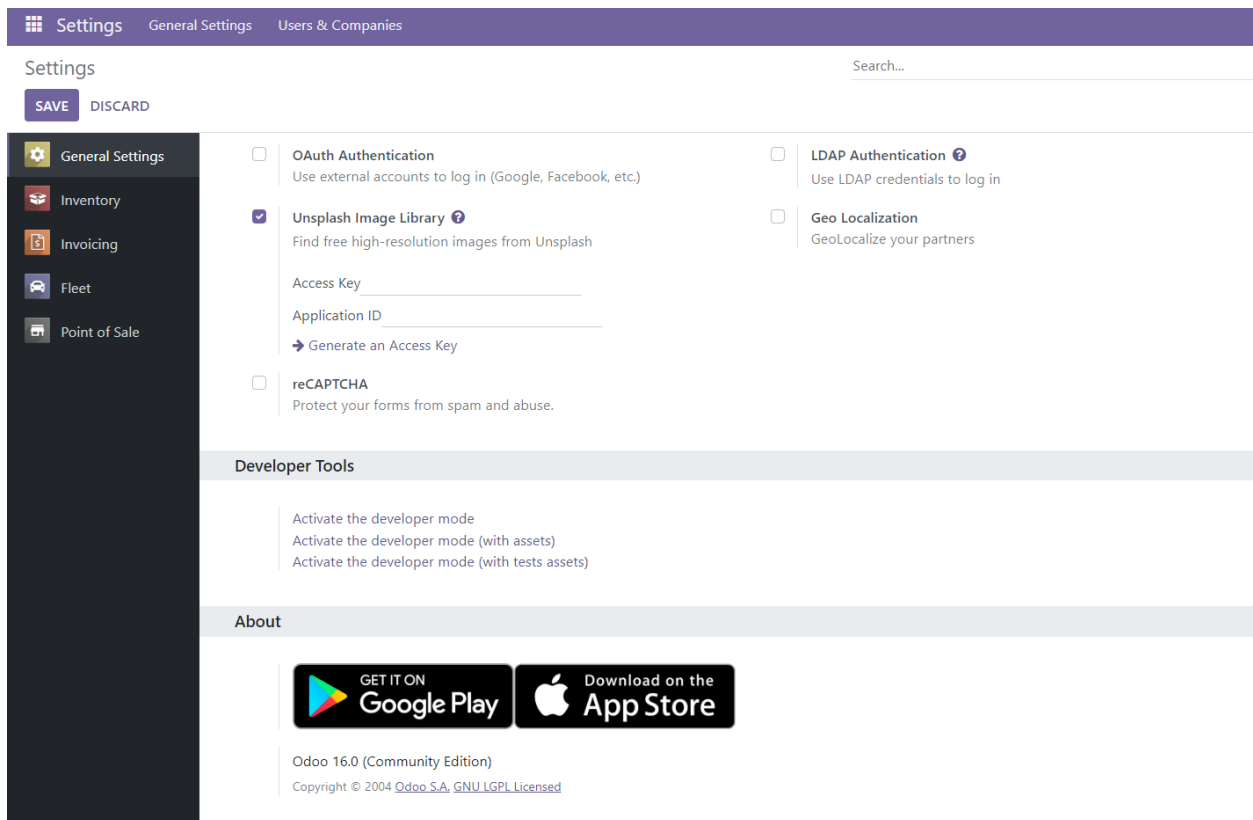
2. Features

- 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.

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'.



Settings General Settings Users & Companies

Settings Search...

SAVE DISCARD



General Settings

- OAuth Authentication
Use external accounts to log in (Google, Facebook, etc.)
- Unsplash Image Library [?](#)
Find free high-resolution images from Unsplash
Access Key _____
Application ID _____
[→ Generate an Access Key](#)
- reCAPTCHA
Protect your forms from spam and abuse.
- LDAP Authentication [?](#)
Use LDAP credentials to log in
- Geo Localization
GeoLocalize your partners

Developer Tools

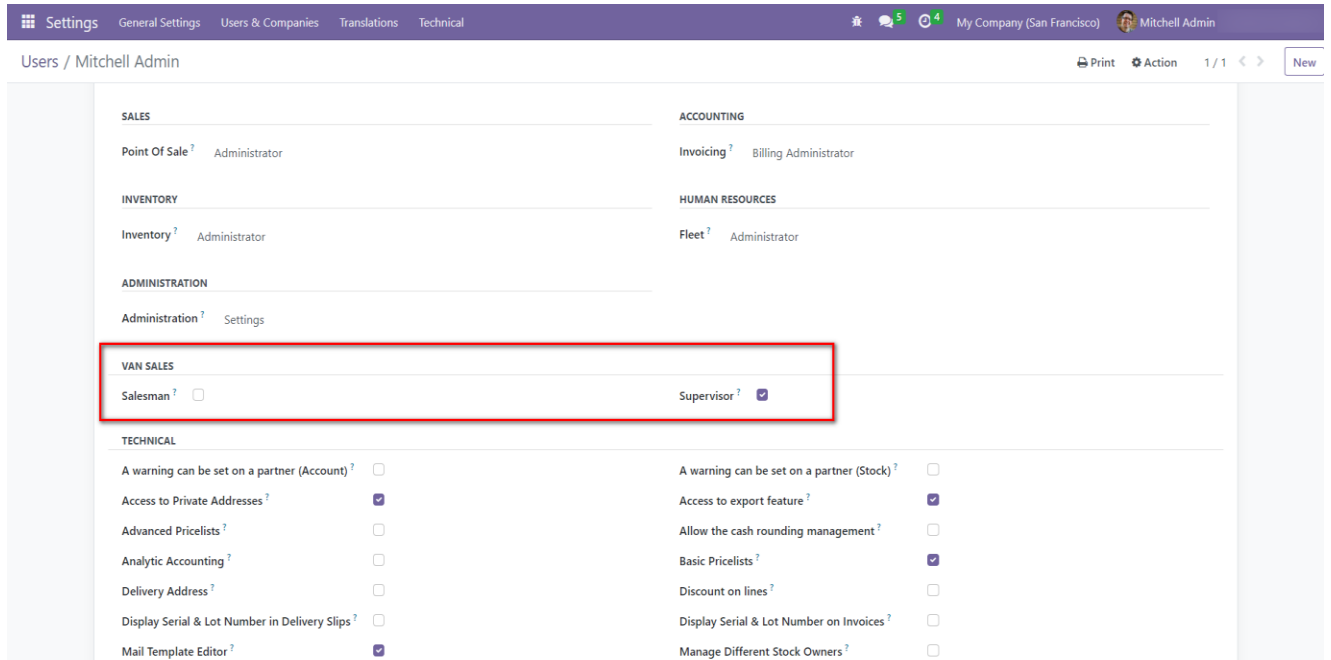
- Activate the developer mode
- Activate the developer mode (with assets)
- Activate the developer mode (with tests assets)

About

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Odoo 16.0 (Community Edition)
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- Navigate to *User & Companies* menu -> *Select Users*.
- Open the desired User -> *Enable Salesman/Supervisor* role -> *Save*.

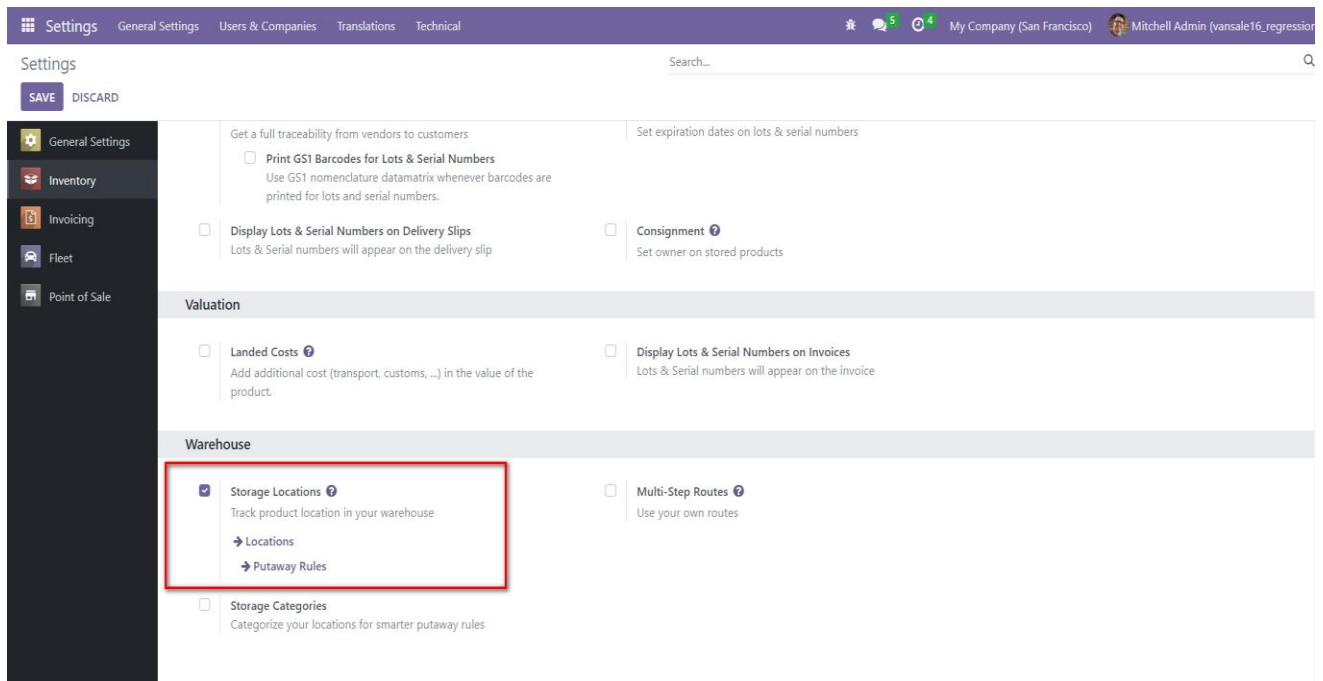


The screenshot shows the user settings for Mitchell Admin. The interface is divided into several sections: SALES, ACCOUNTING, INVENTORY, HUMAN RESOURCES, ADMINISTRATION, VAN SALES, and TECHNICAL. The 'VAN SALES' section is highlighted with a red box and contains two options: 'Salesman' (disabled) and 'Supervisor' (enabled).

Section	Option	Status
VAN SALES	Salesman	<input type="checkbox"/>
	Supervisor	<input checked="" type="checkbox"/>
TECHNICAL	A warning can be set on a partner (Account)	<input type="checkbox"/>
	Access to Private Addresses	<input checked="" type="checkbox"/>
	Advanced Pricelists	<input type="checkbox"/>
	Analytic Accounting	<input type="checkbox"/>
	Delivery Address	<input type="checkbox"/>
	Display Serial & Lot Number in Delivery Slips	<input type="checkbox"/>
	Mail Template Editor	<input checked="" type="checkbox"/>
	A warning can be set on a partner (Stock)	<input type="checkbox"/>
	Access to export feature	<input checked="" type="checkbox"/>
	Allow the cash rounding management	<input type="checkbox"/>

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

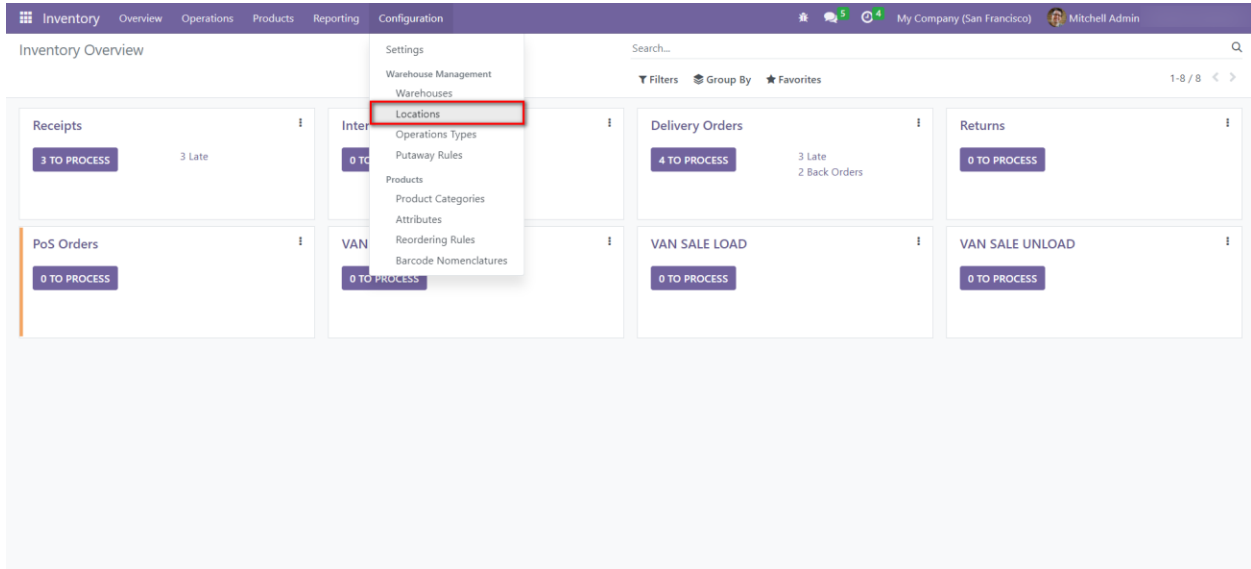
- Go to *Settings* -> *Inventory*.
- Enable *Storage Locations* checkbox -> *Save*.



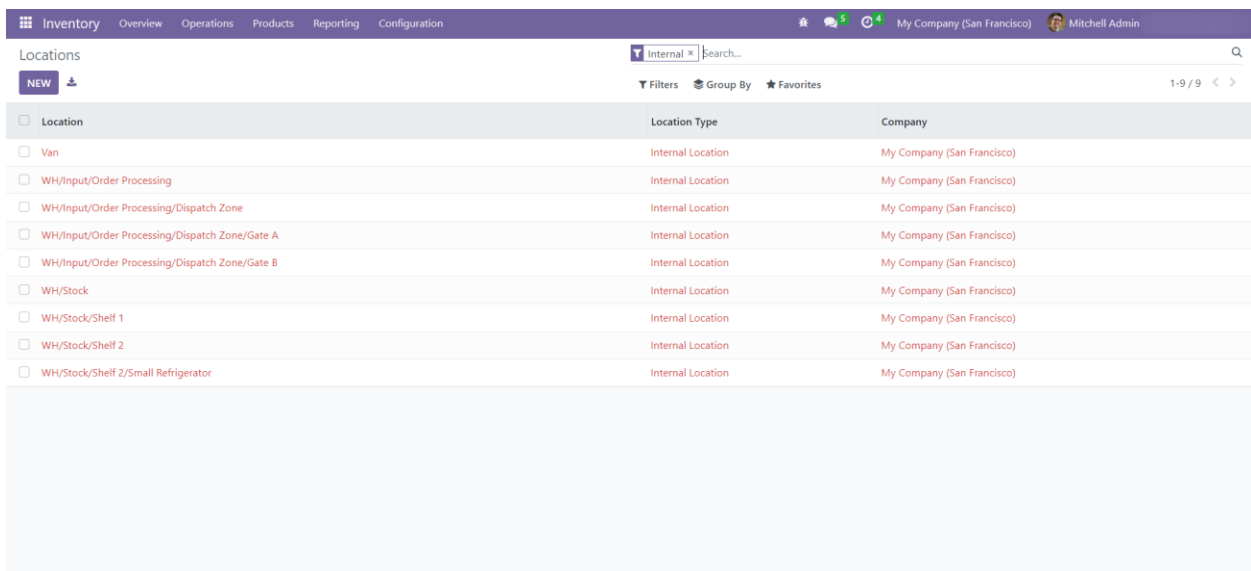
The screenshot shows the PITS settings interface. The top navigation bar includes 'Settings', 'General Settings', 'Users & Companies', 'Translations', and 'Technical'. The user is logged in as 'Mitchell Admin (vansale16_regression)'. The left sidebar shows the 'Inventory' section selected. The main content area is titled 'Settings' and contains several sections: 'General Settings', 'Valuation', and 'Warehouse'. The 'Warehouse' section is highlighted with a red box, and the 'Storage Locations' checkbox is checked. Below the checkbox, there are links for 'Locations' and 'Putaway Rules'. Other settings include 'Print GS1 Barcodes for Lots & Serial Numbers', 'Display Lots & Serial Numbers on Delivery Slips', 'Consignment', 'Landed Costs', 'Display Lots & Serial Numbers on Invoices', and 'Multi-Step Routes'.

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

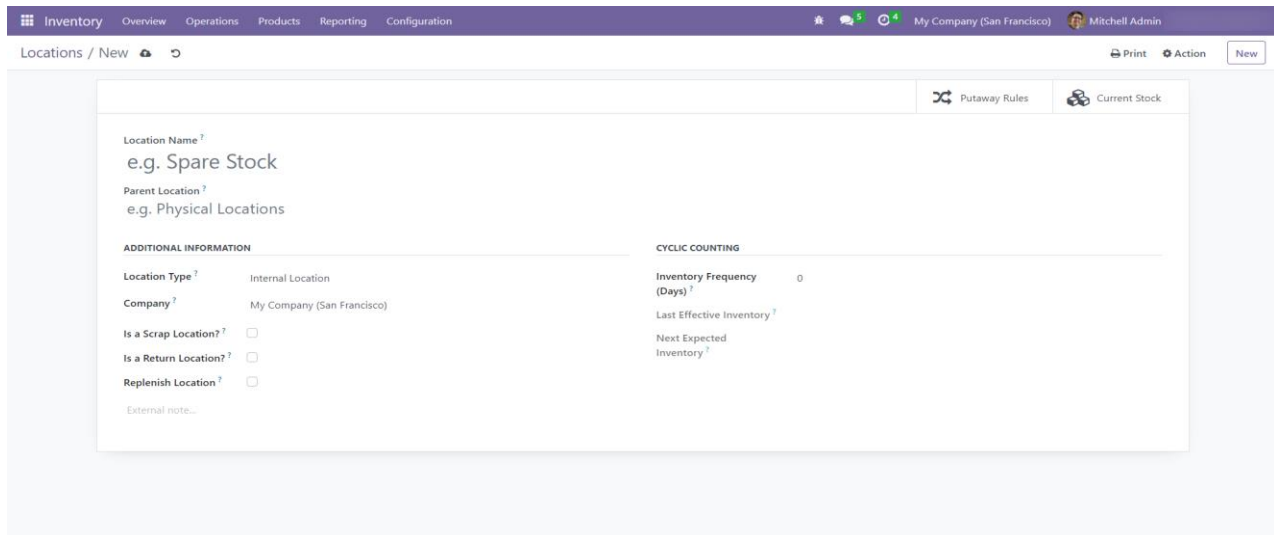
- Go to *Inventory*.
- Navigate to *Configuration* -> *Locations*.



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

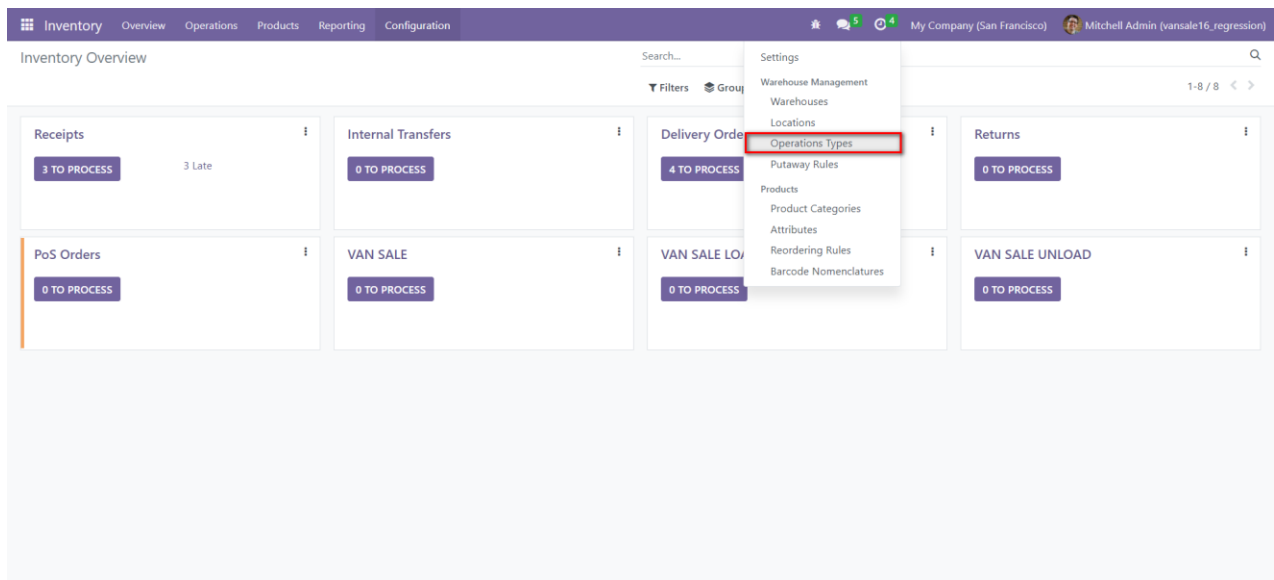


Screenshot 5: Van point of sale – Adding a new location:



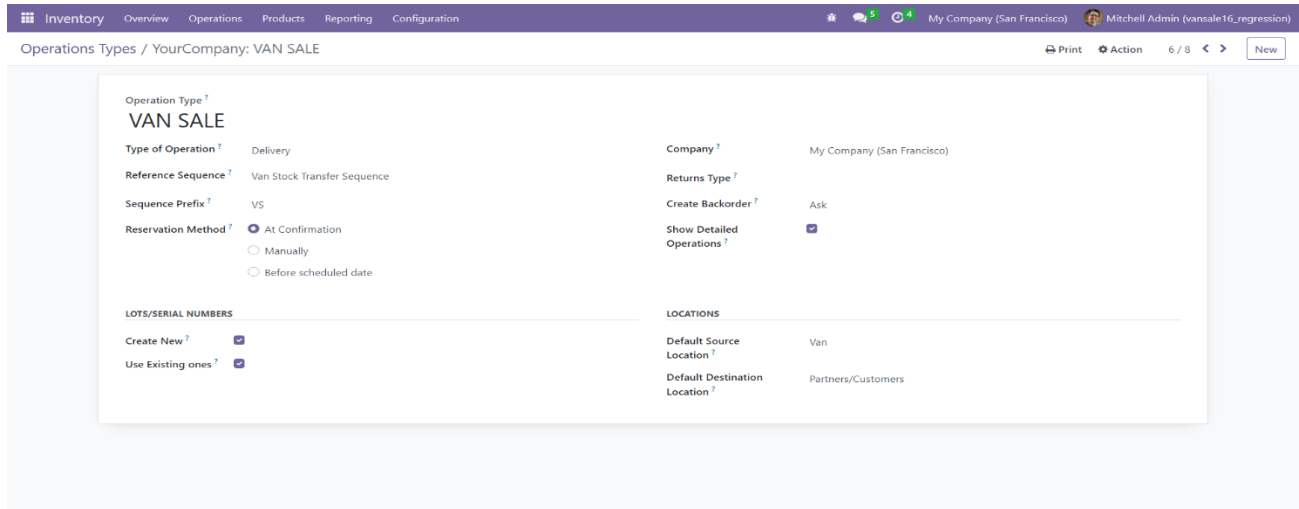
Screenshot 6: Van point of sale - operation types:

- 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.

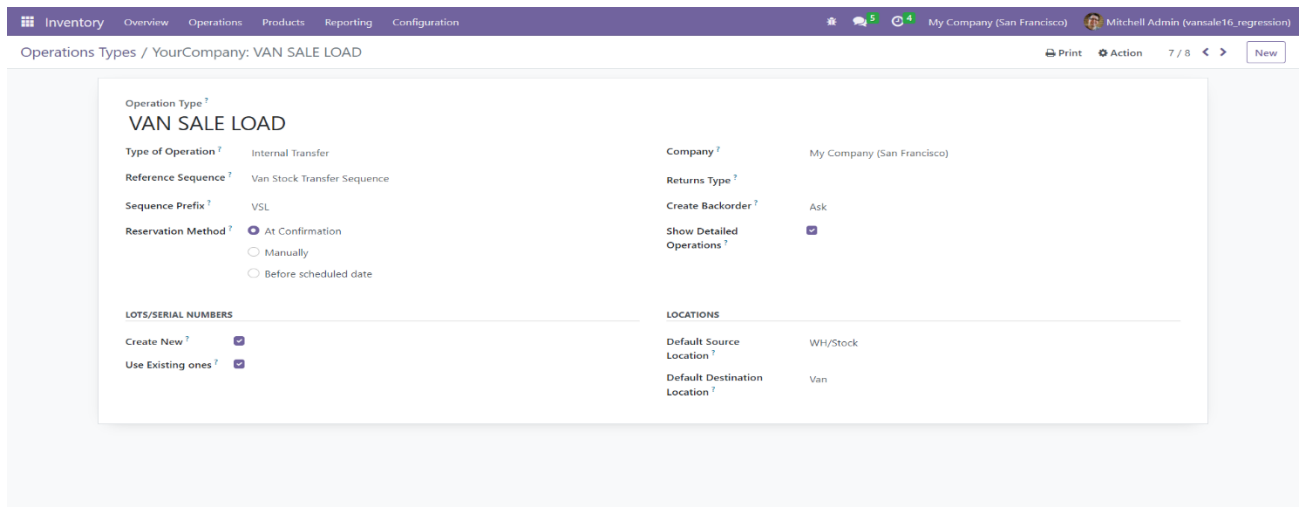


The screenshot shows the configuration page for the 'VAN SALE' operation type. The page is titled 'Operations Types / YourCompany: VAN SALE'. The configuration is as follows:

Field	Value
Operation Type	VAN SALE
Type of Operation	Delivery
Reference Sequence	Van Stock Transfer Sequence
Sequence Prefix	VS
Reservation Method	<input checked="" type="radio"/> At Confirmation <input type="radio"/> Manually <input type="radio"/> Before scheduled date
Company	My Company (San Francisco)
Returns Type	
Create Backorder	Ask
Show Detailed Operations	<input checked="" type="checkbox"/>
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.

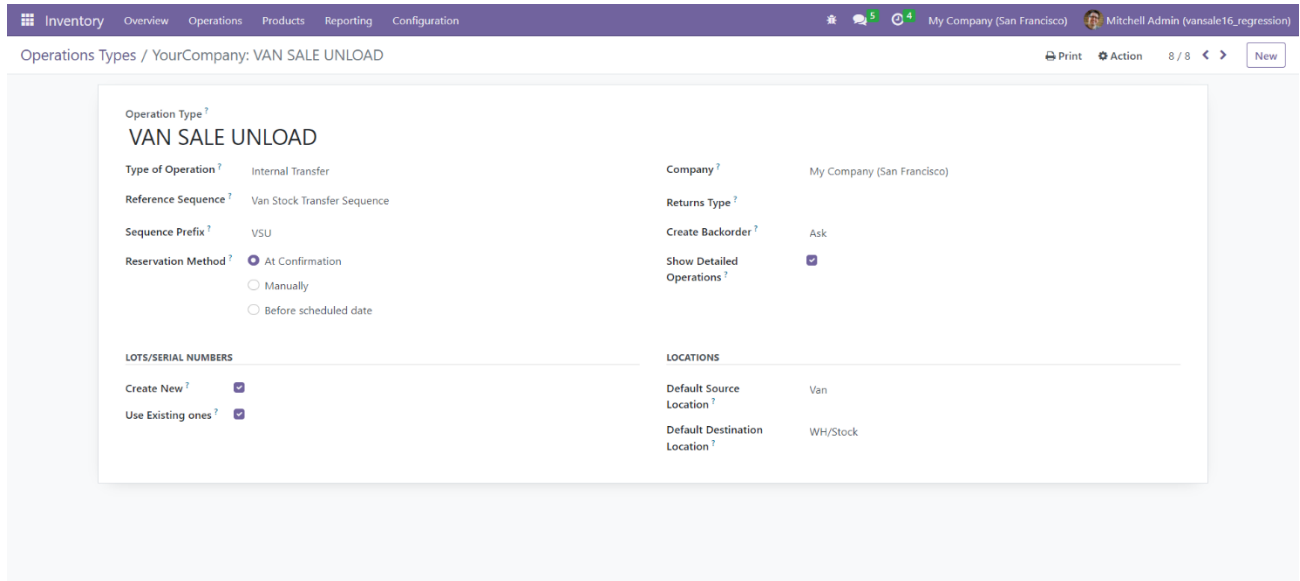


The screenshot shows the configuration page for the 'VAN_SALE_LOAD' operation type. The page is titled 'Operations Types / YourCompany: VAN_SALE_LOAD'. The configuration is as follows:

Field	Value
Operation Type	VAN_SALE_LOAD
Type of Operation	Internal Transfer
Reference Sequence	Van Stock Transfer Sequence
Sequence Prefix	VSL
Reservation Method	<input checked="" type="radio"/> At Confirmation <input type="radio"/> Manually <input type="radio"/> Before scheduled date
Company	My Company (San Francisco)
Returns Type	
Create Backorder	Ask
Show Detailed Operations	<input checked="" type="checkbox"/>
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.



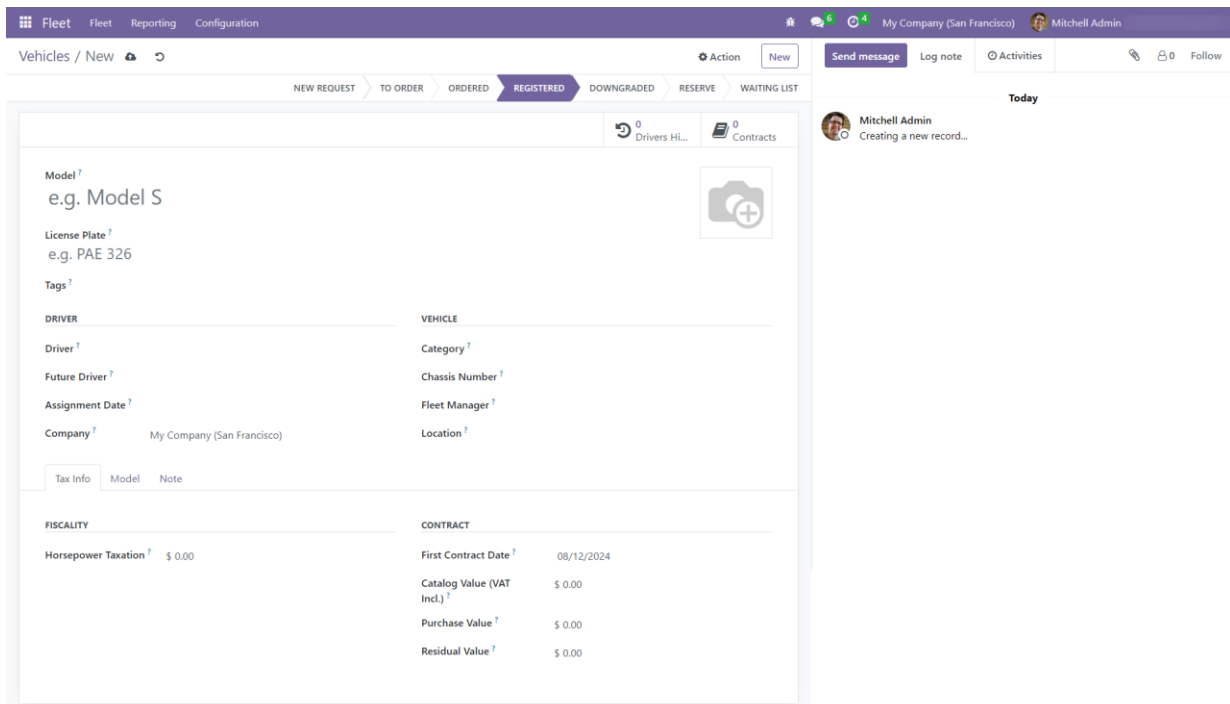
The screenshot shows the configuration page for the 'VAN SALE UNLOAD' operation type. The page is titled 'Operations Types / YourCompany: VAN SALE UNLOAD' and includes a navigation bar with 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The user is logged in as 'Mitchell Admin (vansale16_regression)' for 'My Company (San Francisco)'. The configuration is divided into several sections:

- Operation Type:** VAN SALE UNLOAD
- Type of Operation:** Internal Transfer
- Reference Sequence:** Van Stock Transfer Sequence
- Sequence Prefix:** VSU
- Reservation Method:** At Confirmation, Manually, Before scheduled date
- Company:** My Company (San Francisco)
- Returns Type:** (empty)
- Create Backorder:** Ask
- Show Detailed Operations:**
- LOTS/SERIAL NUMBERS:** Create New, Use Existing ones
- 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.



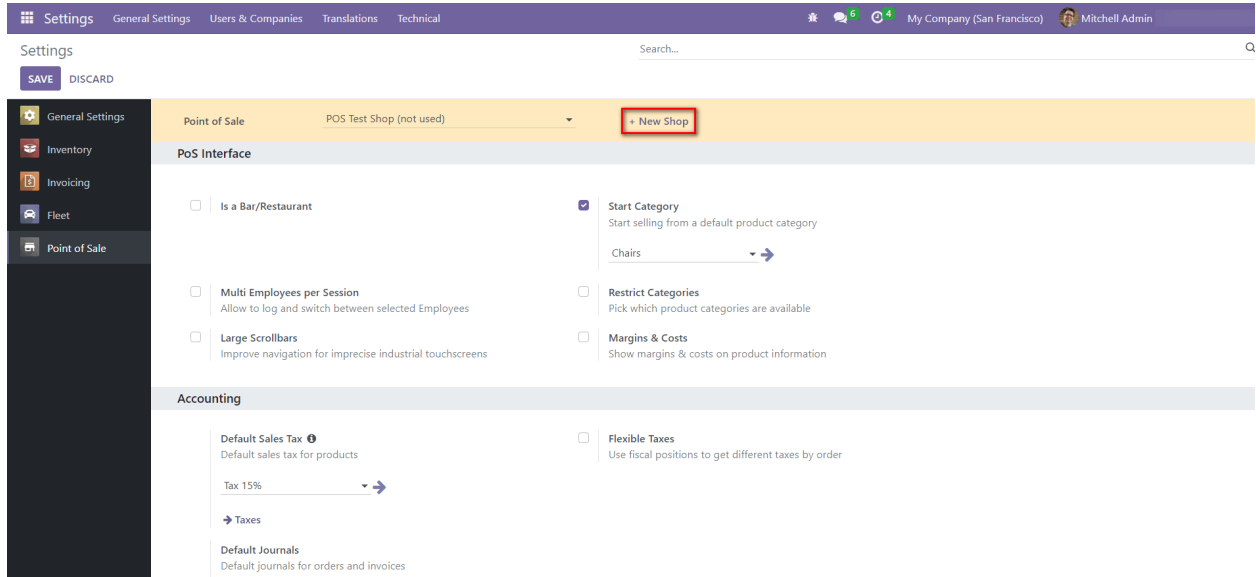
The screenshot displays the 'Vehicles / New' form in the Fleet management module. The form is divided into several sections:

- Model:** e.g. Model S
- License Plate:** e.g. PAE 326
- Tags:**
- DRIVER:**
 - Driver
 - Future Driver
 - Assignment Date
 - Company: My Company (San Francisco)
- VEHICLE:**
 - Category
 - Chassis Number
 - Fleet Manager
 - Location
- FISCALITY:**
 - Horsepower Taxation: \$ 0.00
- CONTRACT:**
 - First Contract Date: 08/12/2024
 - Catalog Value (VAT Incl.): \$ 0.00
 - Purchase Value: \$ 0.00
 - Residual Value: \$ 0.00

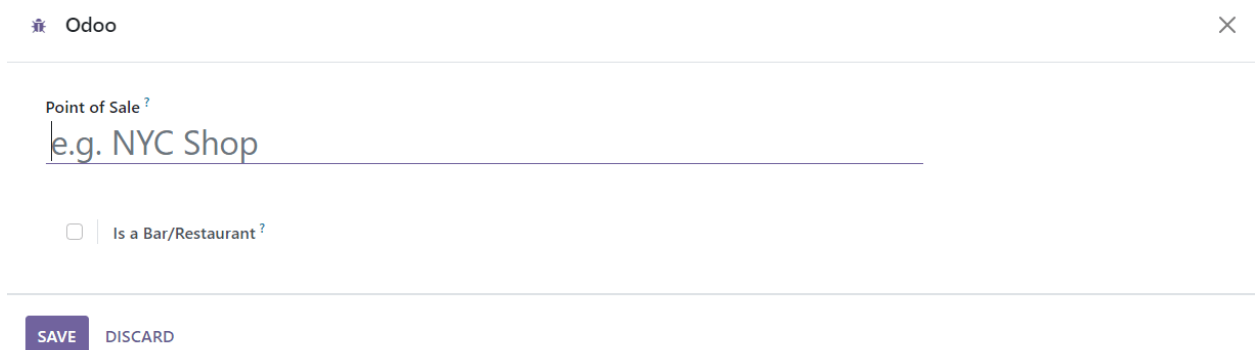
The interface also shows a navigation bar with tabs for 'NEW REQUEST', 'TO ORDER', 'ORDERED', 'REGISTERED', 'DOWNGRADED', 'RESERVE', and 'WAITING LIST'. The 'REGISTERED' tab is currently selected. A sidebar on the right shows the user 'Mitchell Admin' and a notification 'Creating a new record...'. The top navigation bar includes 'Fleet', 'Reporting', and 'Configuration' menus, along with user information and notification icons.

Screenshot 11: Create a new Point of Sale:

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

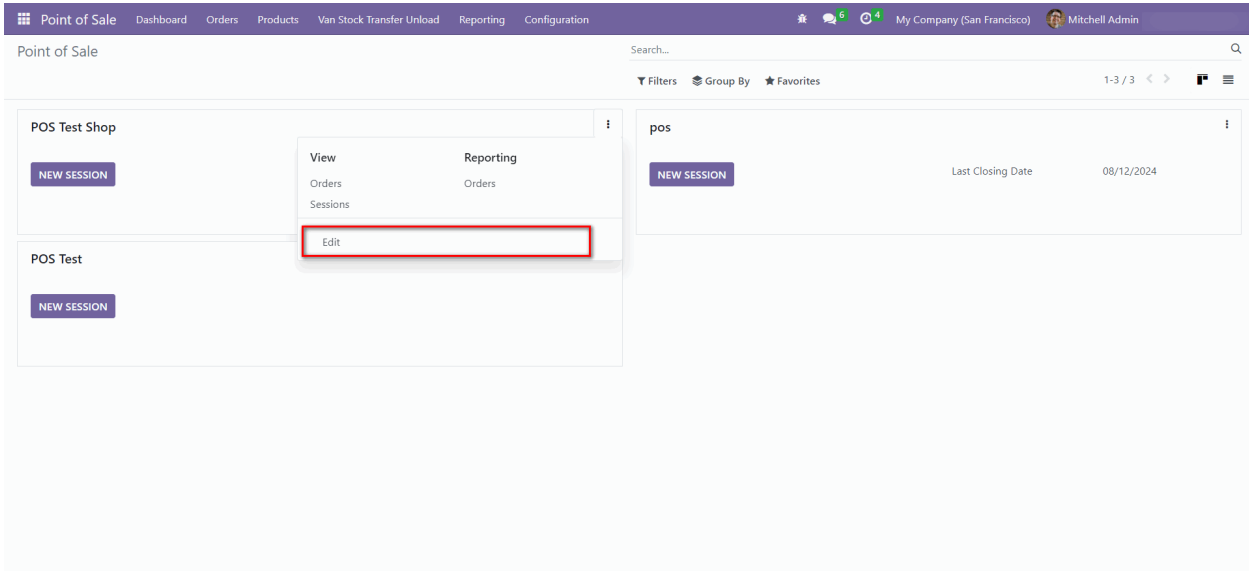


Screenshot 12: Enter new POS details:



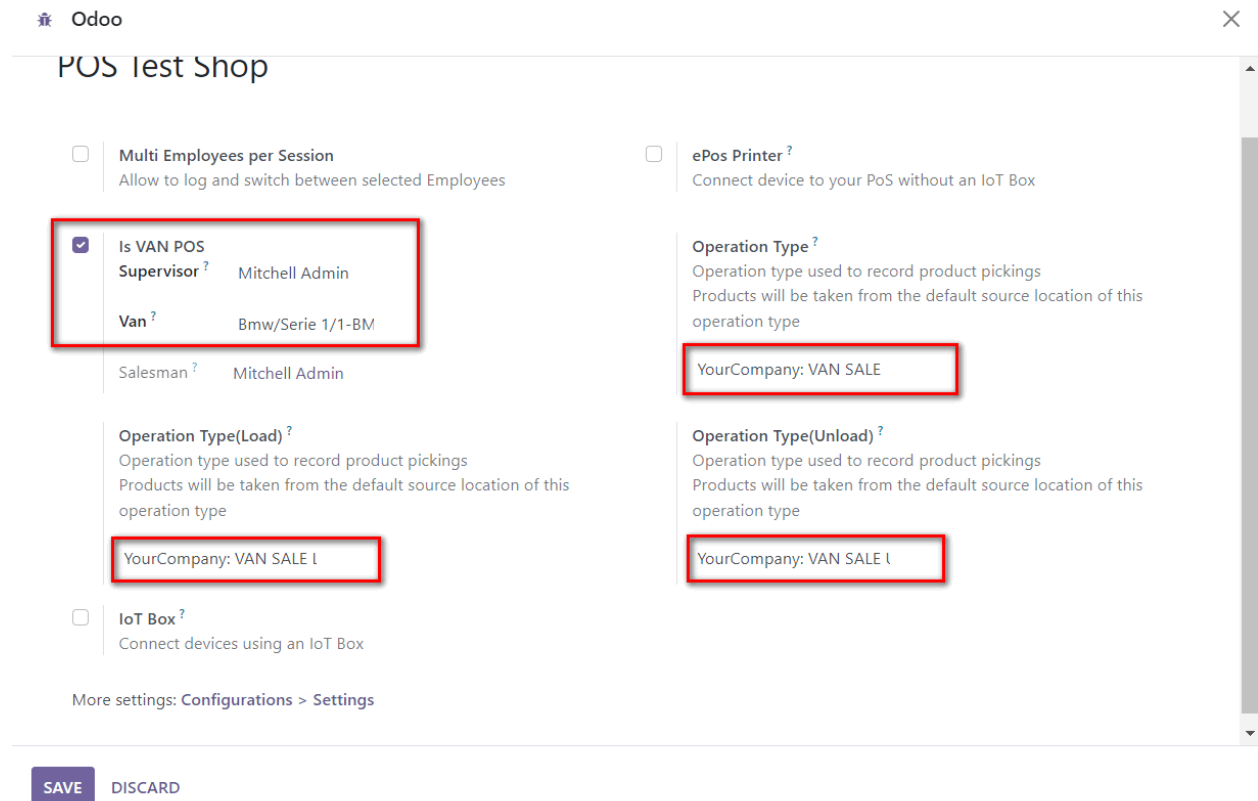
Screenshot 13: Edit new POS:

- 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.
- Click *Save*.



✦ Odoo ×

POS test Shop

Multi Employees per Session
Allow to log and switch between selected Employees

Is VAN POS
Supervisor ? Mitchell Admin
Van ? Bmw/Serie 1/1-BM
Salesman ? Mitchell Admin

Operation Type(Load) ?
Operation type used to record product pickings
Products will be taken from the default source location of this operation type
YourCompany: VAN SALE L

ePos Printer ?
Connect device to your PoS without an IoT Box

Operation Type ?
Operation type used to record product pickings
Products will be taken from the default source location of this operation type
YourCompany: VAN SALE

IoT Box ?
Connect devices using an IoT Box

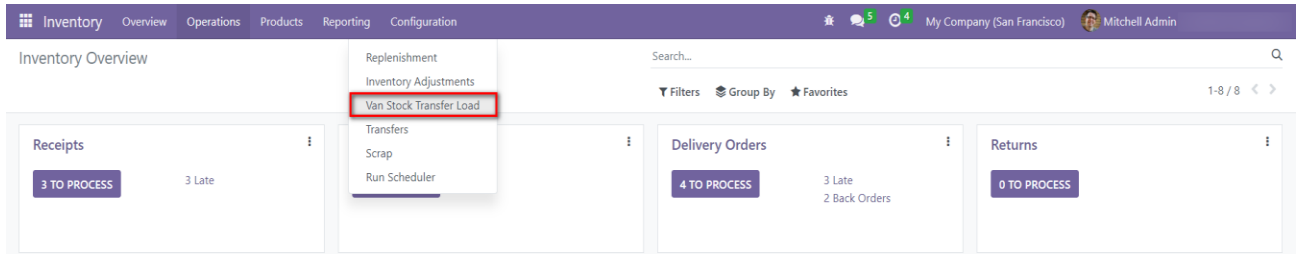
Operation Type(Unload) ?
Operation type used to record product pickings
Products will be taken from the default source location of this operation type
YourCompany: VAN SALE L

More settings: [Configurations > Settings](#)

SAVE DISCARD

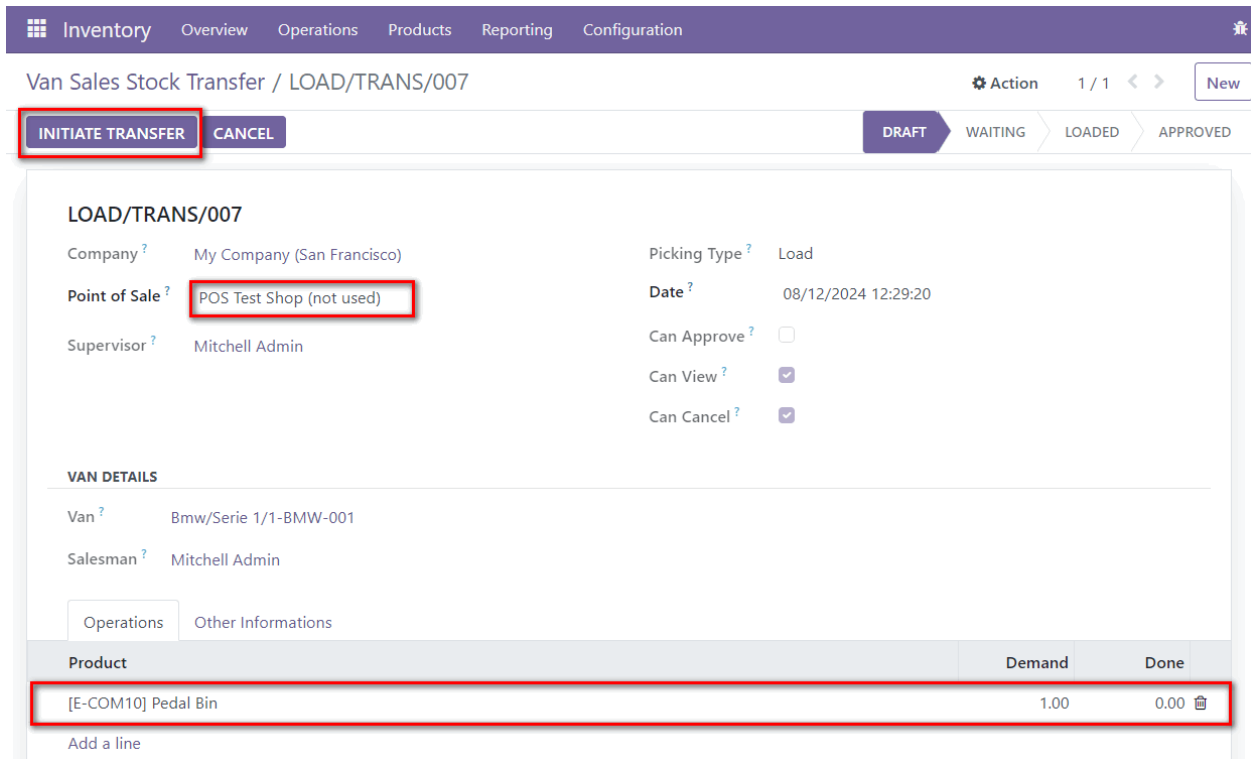
Screenshot 15: Van point of sale - Van Stock Transfer Load:

- 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.



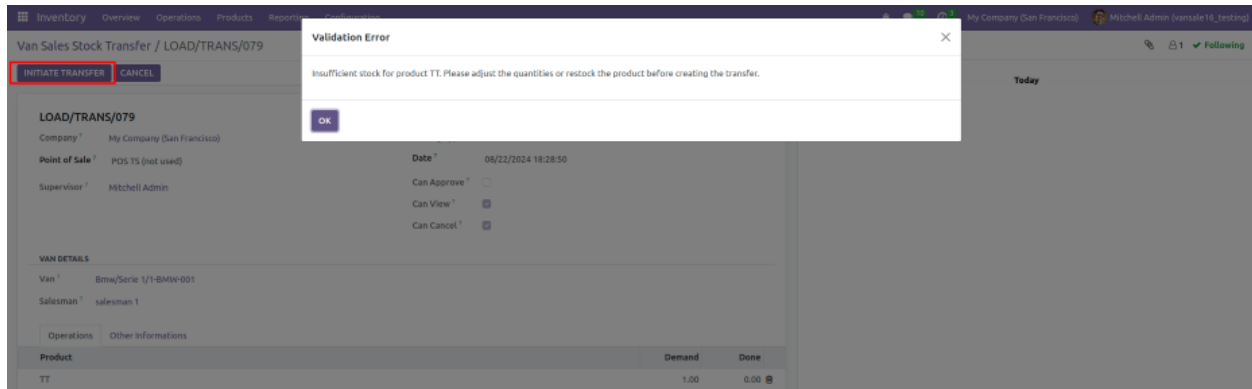
Screenshot 16: Van point of sale – Create Van Stock Transfer Load:

- Select a POS.
- Add products to the van.
- Click on *Initiate Transfer*.

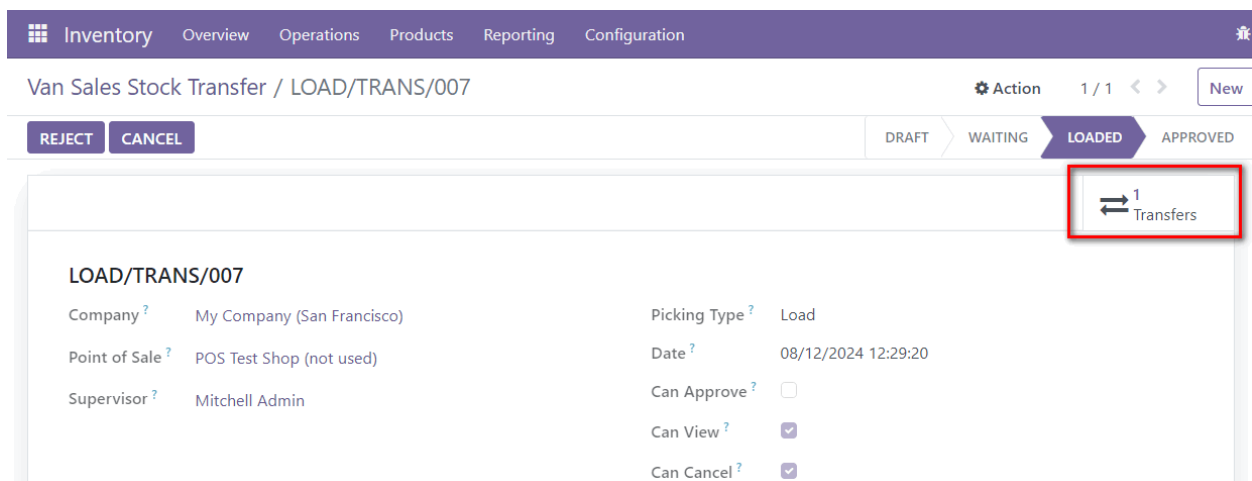


Screenshot 17: When we do not have enough stock for the Product it will not let us initiate the transfer, it will raise validation.

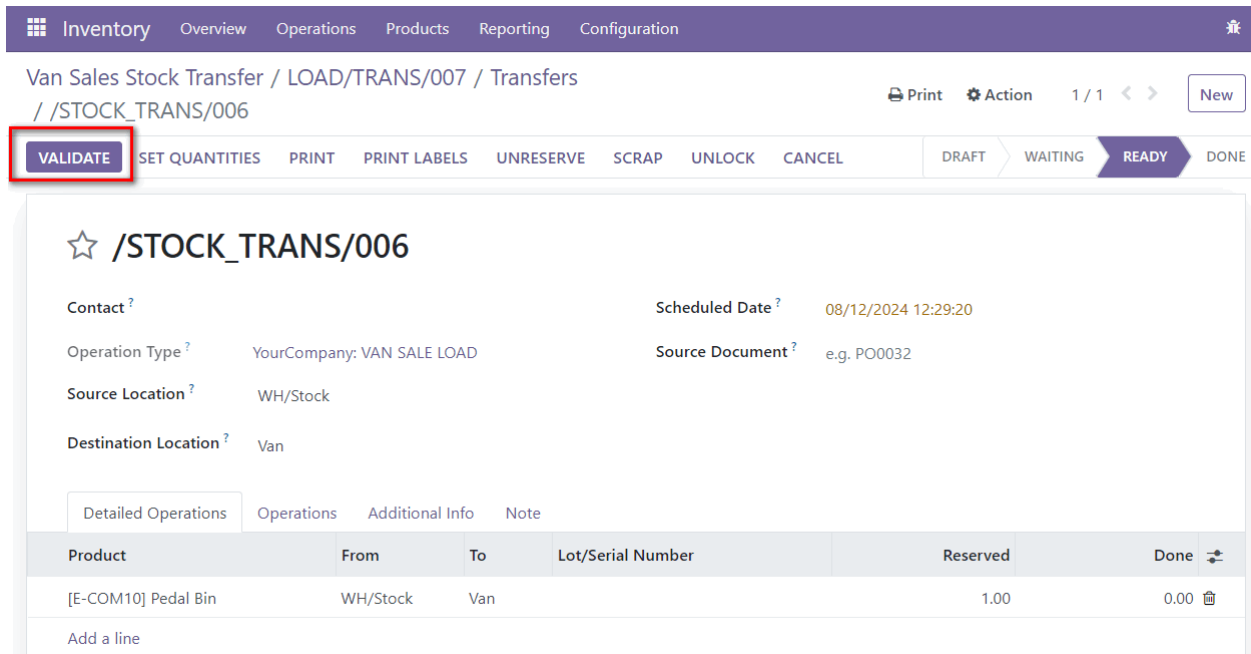
- While initiating the transfer.



Screenshot 18: Van point of sale – View the created transfer if we have enough stock then transfer will be initiated:

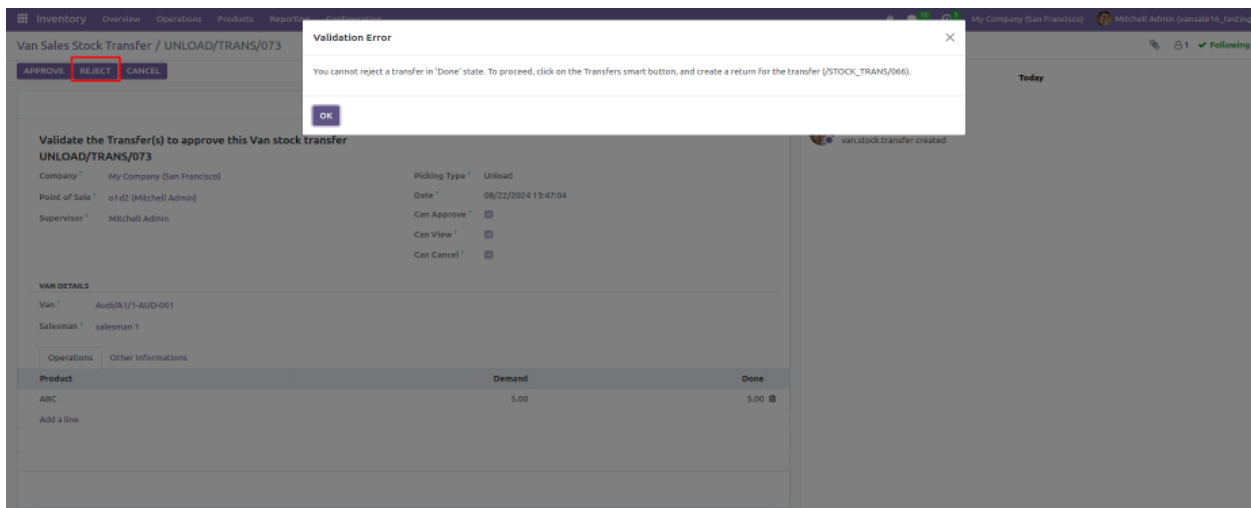


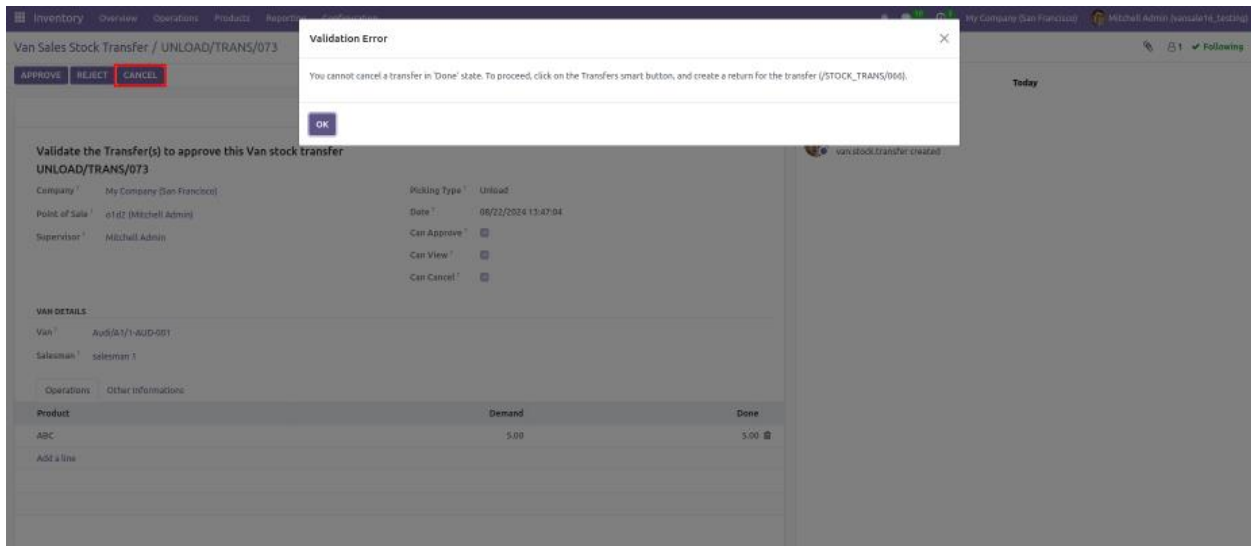
Screenshot 19: Van point of sale – Validate transfer:



Screenshot 20: 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.

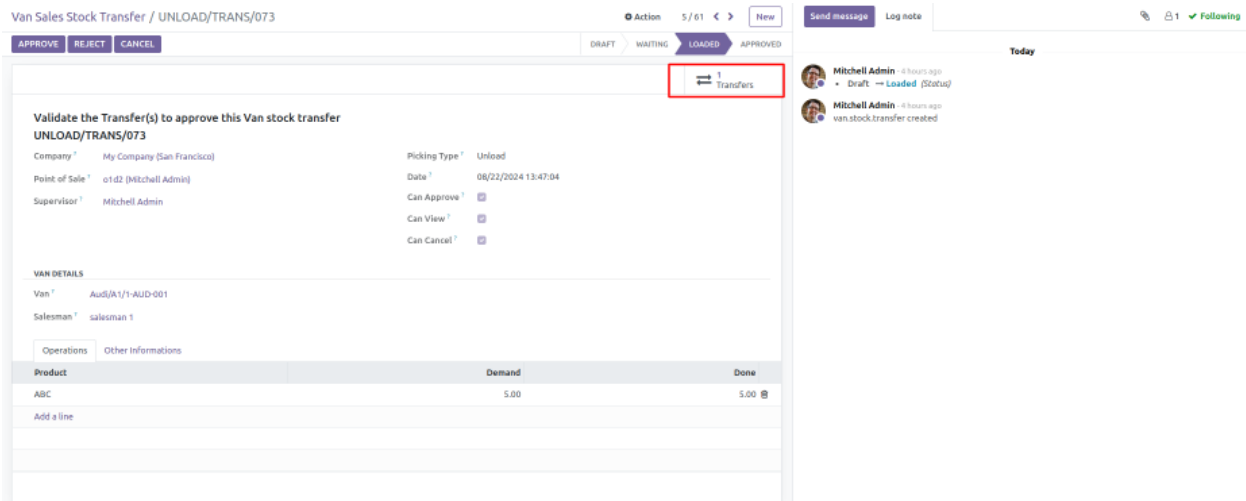
- Go back to Load Transfer record.
- Click on Reject and Cancel.





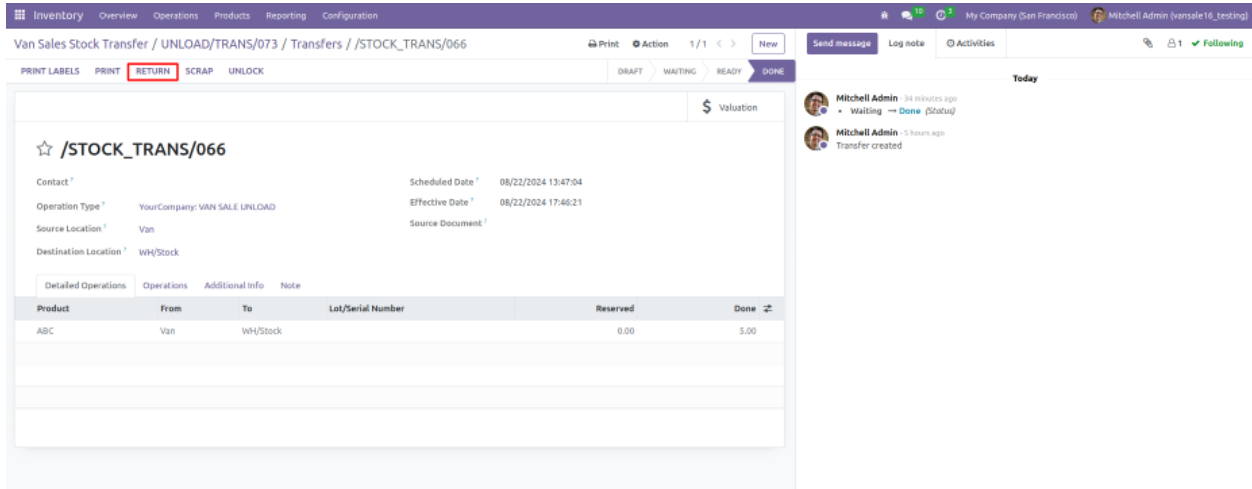
Screenshot 21: In case of Reject and Cancel getting stock back to Warehouse – Create Return.

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



Screenshot 22: Create Return:

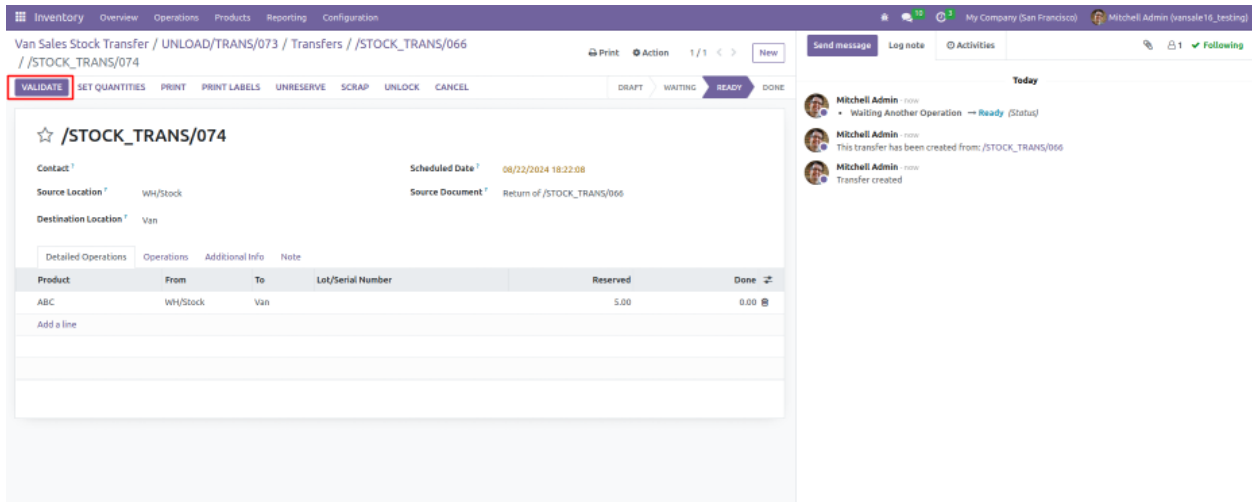
- Click on return button.



The screenshot shows the 'Van Sales Stock Transfer' interface for document /STOCK_TRANS/066. The 'RETURN' button is highlighted in red. The interface includes a navigation bar with 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The main content area displays the document details, including 'Contact', 'Operation Type', 'Source Location', and 'Destination Location'. A table below shows the stock transfer details for product ABC, with a 'Reserved' quantity of 0.00 and a 'Done' quantity of 5.00. The right sidebar shows a list of activities, including 'Waiting' and 'Done' status updates.

Screenshot 23: Validate the Return:

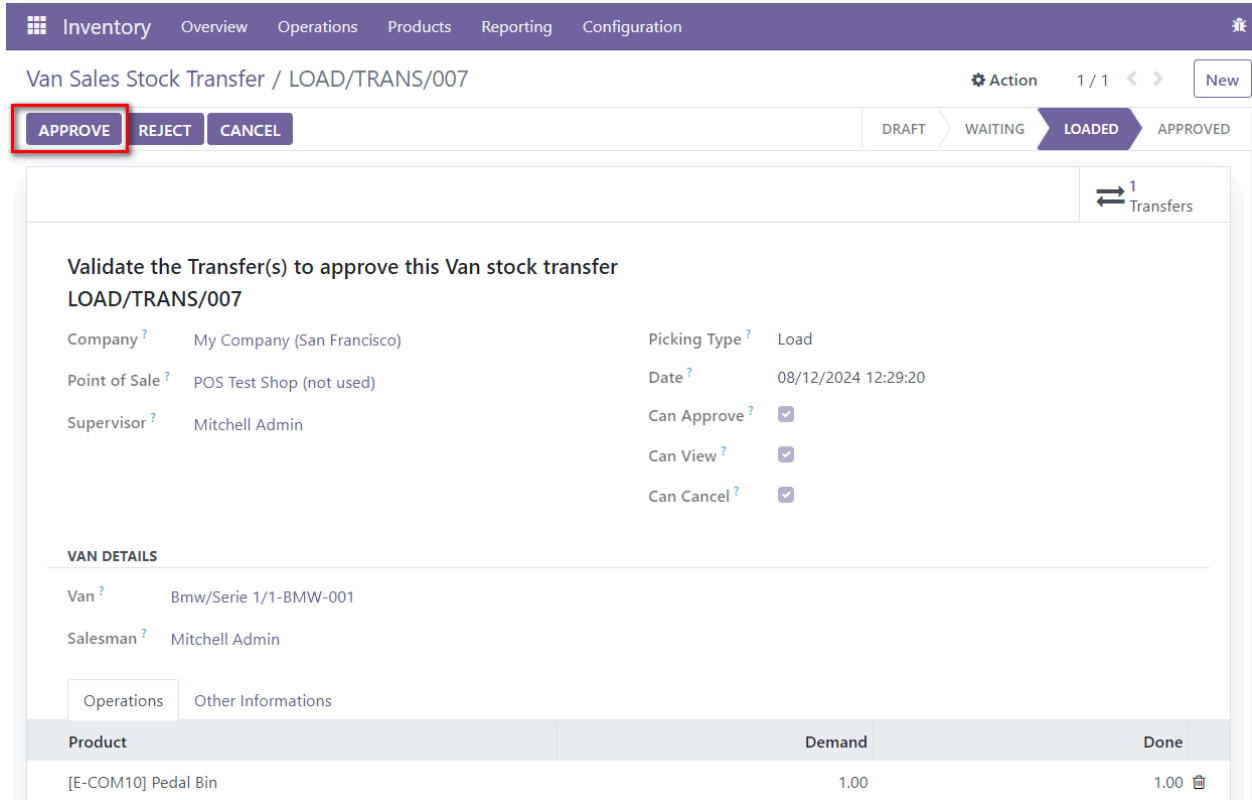
- Stock will be moved to warehouse.



The screenshot shows the 'Van Sales Stock Transfer' interface for document /STOCK_TRANS/074. The 'VALIDATE' button is highlighted in red. The interface includes a navigation bar with 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The main content area displays the document details, including 'Source Location', 'Destination Location', and 'Source Document'. A table below shows the stock transfer details for product ABC, with a 'Reserved' quantity of 5.00 and a 'Done' quantity of 0.00. The right sidebar shows a list of activities, including 'Waiting Another Operation' and 'Ready' status updates.

Screenshot 24: Van point of sale – Load Transfer Approval:

- Go back to *Load Transfer* record.
- Click *Approve*.



The screenshot displays the 'Van Sales Stock Transfer / LOAD/TRANS/007' record in the 'LOADED' state. The 'APPROVE' button is highlighted with a red box. The interface includes a navigation menu at the top, a status bar with 'DRAFT', 'WAITING', 'LOADED', and 'APPROVED' tabs, and a main content area with the following details:


Validate the Transfer(s) to approve this Van stock transfer
LOAD/TRANS/007

Company ?	My Company (San Francisco)	Picking Type ?	Load
Point of Sale ?	POS Test Shop (not used)	Date ?	08/12/2024 12:29:20
Supervisor ?	Mitchell Admin	Can Approve ?	<input checked="" type="checkbox"/>
		Can View ?	<input checked="" type="checkbox"/>
		Can Cancel ?	<input checked="" type="checkbox"/>

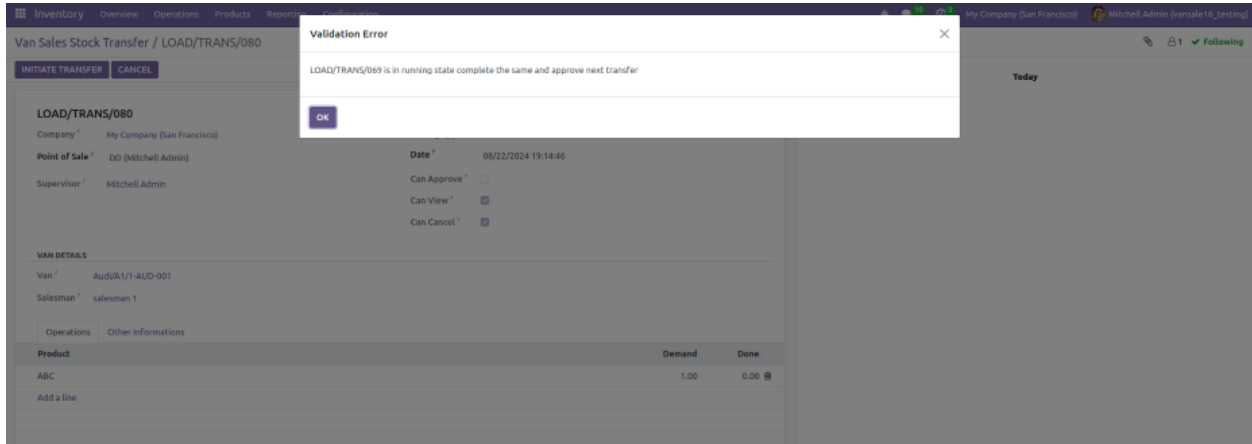
VAN DETAILS

Van ?	Bmw/Serie 1/1-BMW-001
Salesman ?	Mitchell Admin

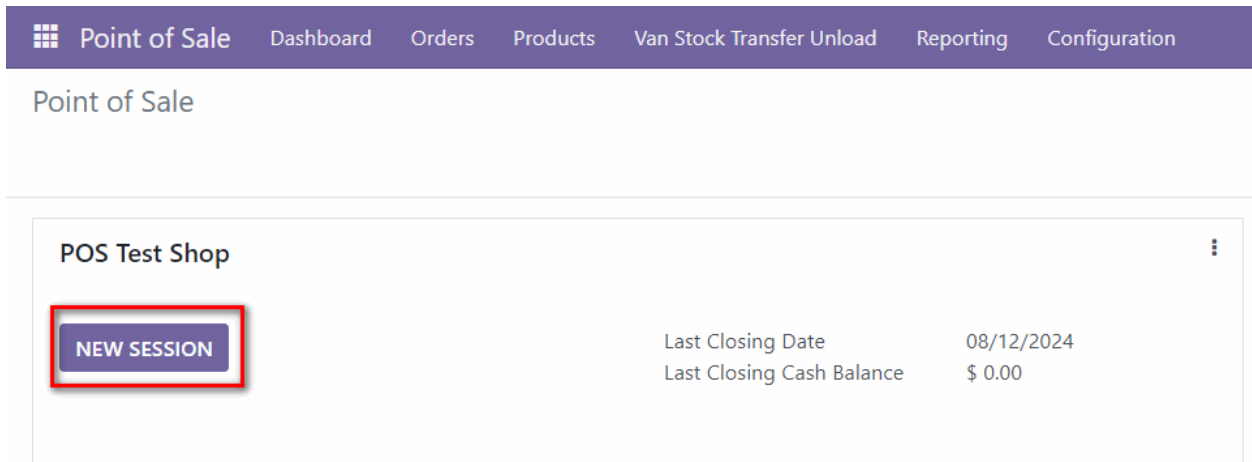
Operations | Other Informations

Product	Demand	Done
[E-COM10] Pedal Bin	1.00	1.00 

Screenshot 25: 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.

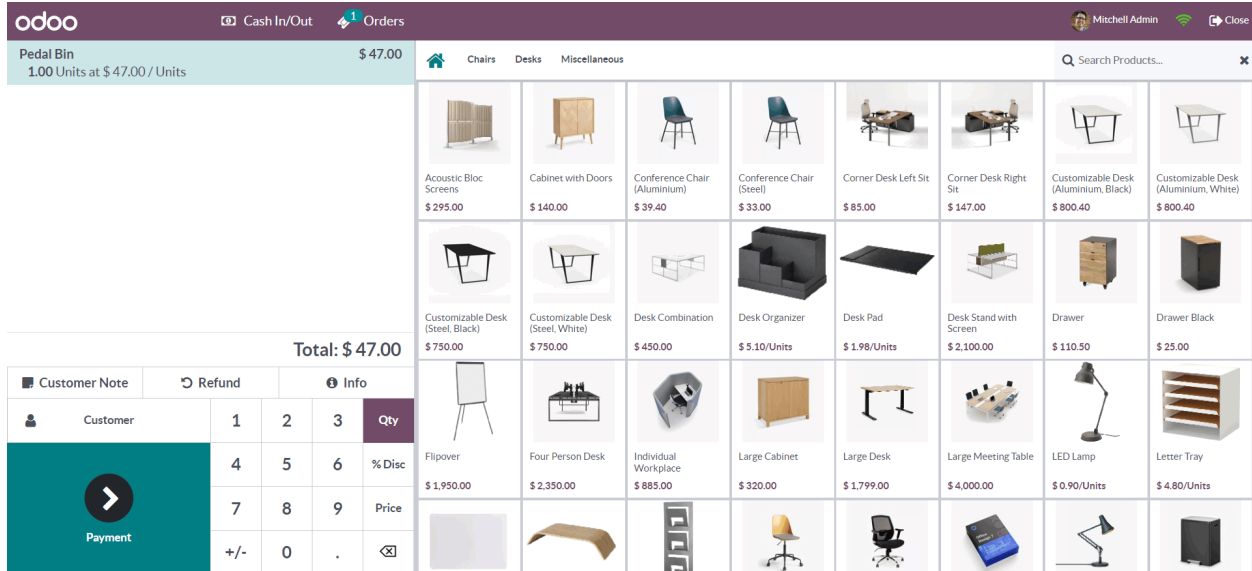


Screenshot 26: Van point of sale – Open new POS session:



Screenshot 27: 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*.



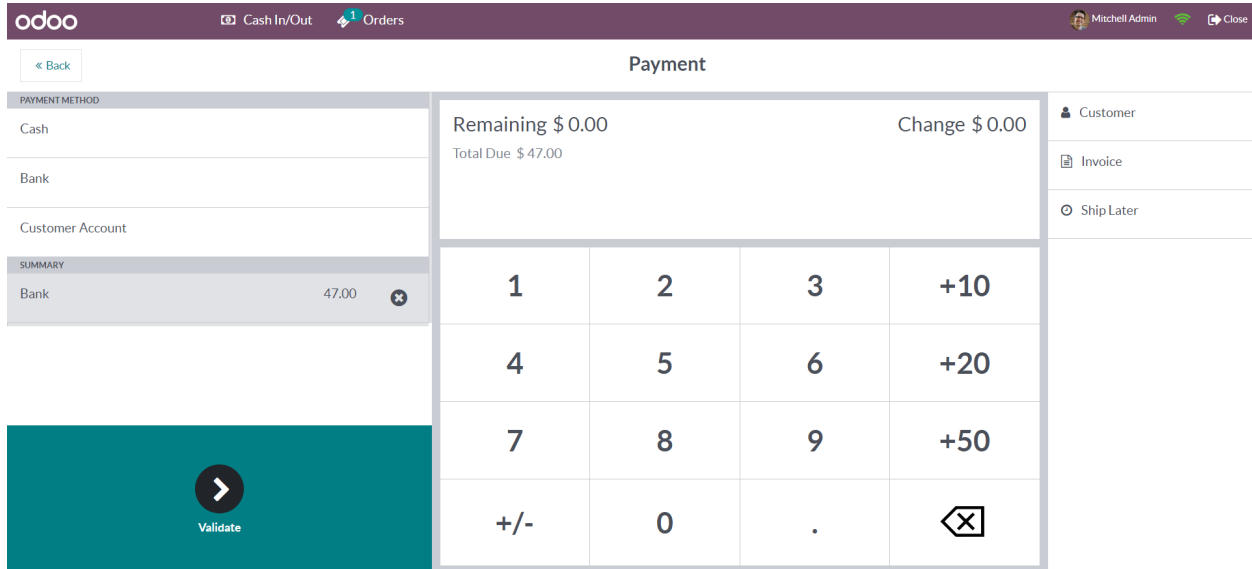
The screenshot shows the odoo POS interface. At the top, there's a header with 'odoo', 'Cash In/Out', 'Orders', and user information 'Mitchell Admin'. Below the header, a summary bar shows 'Pedal Bin' with '1.00 Units at \$ 47.00 / Units' and a total of '\$ 47.00'. The main area is a grid of products categorized under 'Chairs', 'Desks', and 'Miscellaneous'. Each product card includes an image, name, and price. A search bar is located at the top right of the product grid. On the left side, there's a sidebar with a 'Customer Note' field, a 'Refund' button, and an 'Info' section. Below the sidebar, there's a 'Payment' button with a right-pointing arrow. A numeric keypad is also visible, with buttons for digits 1-9, '+/-', and a decimal point.

Customer Note		Refund		Info	
Customer	1	2	3	Qty	
	4	5	6	% Disc	
	7	8	9	Price	
	+/-	0	.		

Product Name	Price
Acoustic Bloc Screens	\$ 295.00
Cabinet with Doors	\$ 140.00
Conference Chair (Aluminium)	\$ 39.40
Conference Chair (Steel)	\$ 33.00
Corner Desk Left Sit	\$ 85.00
Corner Desk Right Sit	\$ 147.00
Customizable Desk (Aluminium, Black)	\$ 800.40
Customizable Desk (Aluminium, White)	\$ 800.40
Customizable Desk (Steel, Black)	\$ 750.00
Customizable Desk (Steel, White)	\$ 750.00
Desk Combination	\$ 450.00
Desk Organizer	\$ 5.10/Units
Desk Pad	\$ 1.98/Units
Desk Stand with Screen	\$ 2.100.00
Drawer	\$ 110.50
Drawer Black	\$ 25.00
Flipover	\$ 1.950.00
Four Person Desk	\$ 2.350.00
Individual Workplace	\$ 885.00
Large Cabinet	\$ 320.00
Large Desk	\$ 1.799.00
Large Meeting Table	\$ 4.000.00
LED Lamp	\$ 0.90/Units
Letter Tray	\$ 4.80/Units

Screenshot 28: Van point of sale, Sell the loaded products:

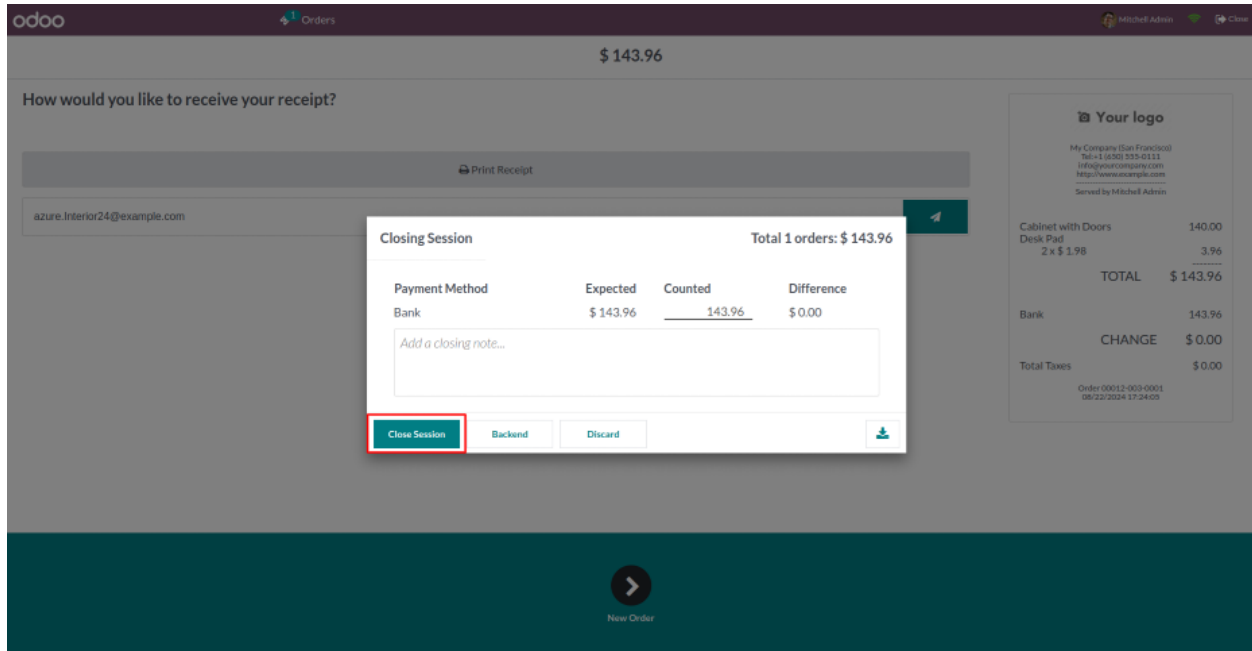
- Select any payment method – Bank/Cash.
- Validate payment.



The screenshot shows the Odoo POS 'Payment' interface. At the top, the 'odoo' logo is on the left, and 'Cash In/Out' and 'Orders' are in the center. On the right, the user 'Mitchell Admin' and a 'Close' button are visible. Below the header, there is a '< Back' button and the title 'Payment'. The interface is divided into several sections:

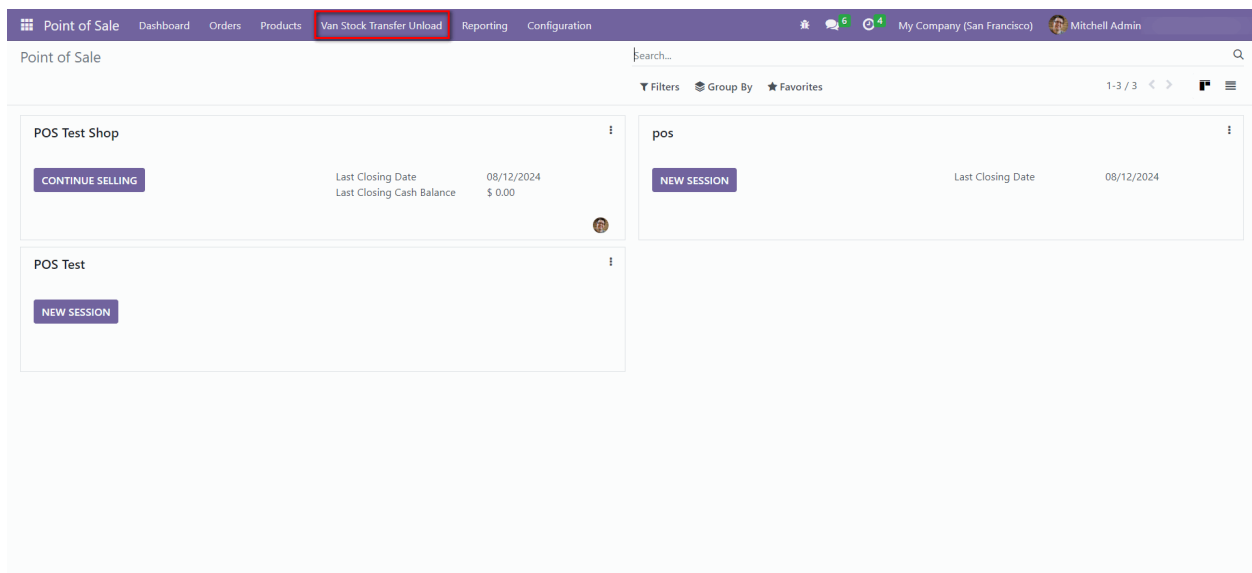
- PAYMENT METHOD:** A list with 'Cash', 'Bank', and 'Customer Account'. 'Bank' is selected.
- SUMMARY:** Shows 'Bank' with a value of '47.00' and a close icon.
- Payment Summary:** 'Remaining \$ 0.00' and 'Change \$ 0.00'. 'Total Due \$ 47.00' is also displayed.
- Customer Actions:** 'Customer', 'Invoice', and 'Ship Later' options.
- Numeric Keypad:** A grid of buttons for digits 1-9, '+/-', '0', and a decimal point with a delete icon.
- Validate Button:** A large teal button with a right arrow and the text 'Validate'.

Screenshot 29: 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 30: 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 31: 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*.

Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reporting Configuration

Van Sales Stock Transfer / UNLOAD/TRANS/010 Action 1 / 1 New

INITIATE TRANSFER CANCEL **DRAFT** WAITING LOADED APPROVED

UNLOAD/TRANS/010

Company ?	My Company (San Francisco)	Picking Type ?	Unload
Point of Sale ?	POS Test Shop (Mitchell Admin)	Date ?	08/12/2024 13:07:05
Supervisor ?	Mitchell Admin	Can Approve ?	<input type="checkbox"/>
		Can View ?	<input checked="" type="checkbox"/>
		Can Cancel ?	<input checked="" type="checkbox"/>

VAN DETAILS

Van ?	Bmw/Serie 1/1-BMW-001
Salesman ?	Mitchell Admin

Operations Other Informations

Product	Demand	Done
[E-COM10] Pedal Bin	1.00	0.00


Screenshot 32: Van point of sale – Validate Product Transfer:

Screenshot 33: Van point of sale – Approve Unload Transfer:


Screenshot 34: Van point of sale – Close session:

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

Closing Session **Total 1 orders: \$ 170.00**

Payment Method	Expected	Counted	Difference
Cash	\$ 200.00	<u>0</u>	 \$ -200.00
Opening	\$ 0.00		
+ Cash difference observed during the counting (Profit) - opening	\$ 200.00		
Bank	\$ 170.00	<u>170</u>	\$ 0.00
Customer Account	\$ 0.00		

Add a closing note...

Close Session Backend Discard 

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 manager should give them access to transfer the load.

Step 9 - Then create a new point sale.

Step 10 - While creating new POS add the operation type to it.

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 16.0.

6. Changes Log / Release Notes

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 version.

7. Support

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