



User Manual

Van Sales POS Plugin v16.0

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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 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.

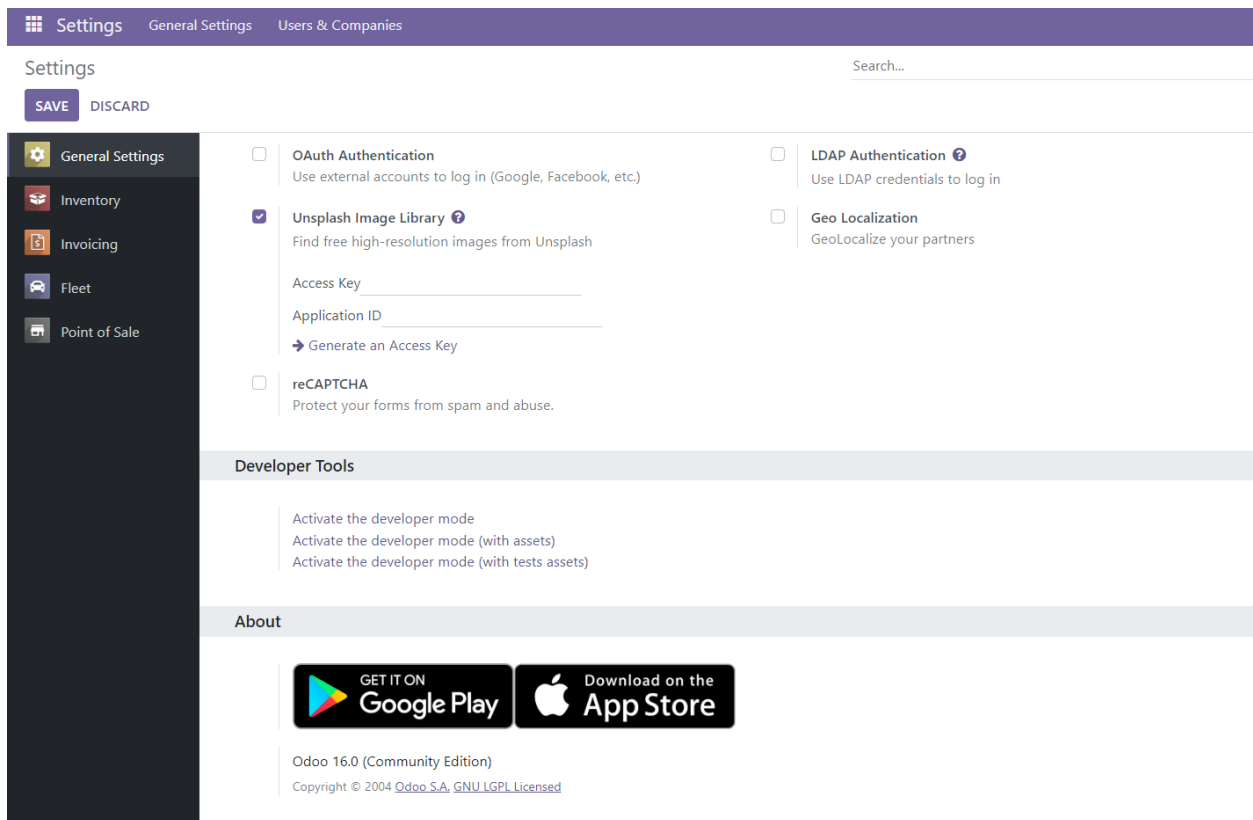
2. Features

- 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'.



The screenshot shows the Odoo 16.0 Settings interface. The top navigation bar includes 'Settings', 'General Settings', and 'Users & Companies'. The left sidebar lists various settings categories: General Settings, Inventory, Invoicing, Fleet, and Point of Sale. The main content area is titled 'Settings' and includes a search bar and 'SAVE' and 'DISCARD' buttons. The 'Developer Tools' section is highlighted, showing options to 'Activate the developer mode', 'Activate the developer mode (with assets)', and 'Activate the developer mode (with tests assets)'. Below this, the 'About' section displays 'Odoo 16.0 (Community Edition)' and 'Copyright © 2004 Odoo S.A. GNU LGPL Licensed'. At the bottom, there are buttons for 'GET IT ON Google Play' and 'Download on the App Store'.

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

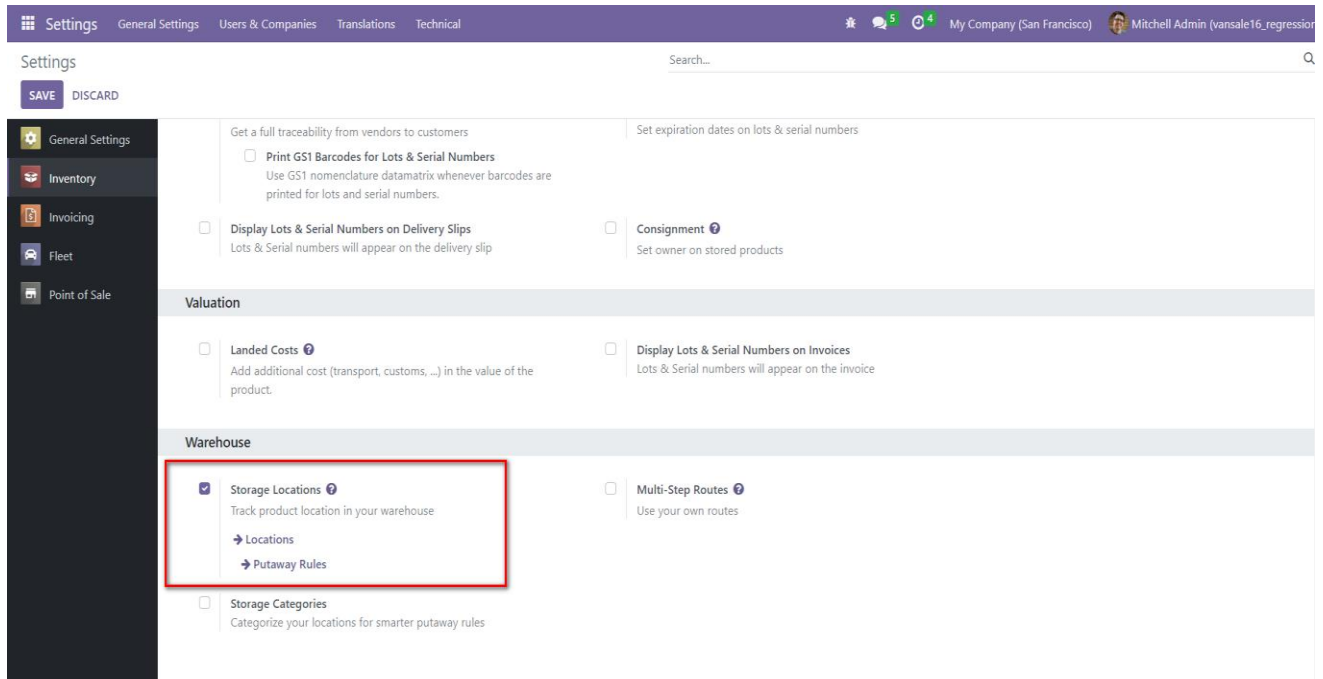
The screenshot shows the 'Users / Mitchell Admin' settings page. The 'VAN SALES' section is highlighted with a red box. It contains two checkboxes: 'Salesman' (unchecked) and 'Supervisor' (checked). Other sections include SALES, ACCOUNTING, INVENTORY, HUMAN RESOURCES, ADMINISTRATION, and TECHNICAL.

- If you want to give supervisor as administration access.

The screenshot shows the 'Users / SU' settings page. The 'ADMINISTRATION' section is highlighted with a red box. It contains a dropdown menu with 'Settings' selected. Other sections include USER TYPE, SALES, ACCOUNTING, INVENTORY, HUMAN RESOURCES, VAN SALES, and TECHNICAL.

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

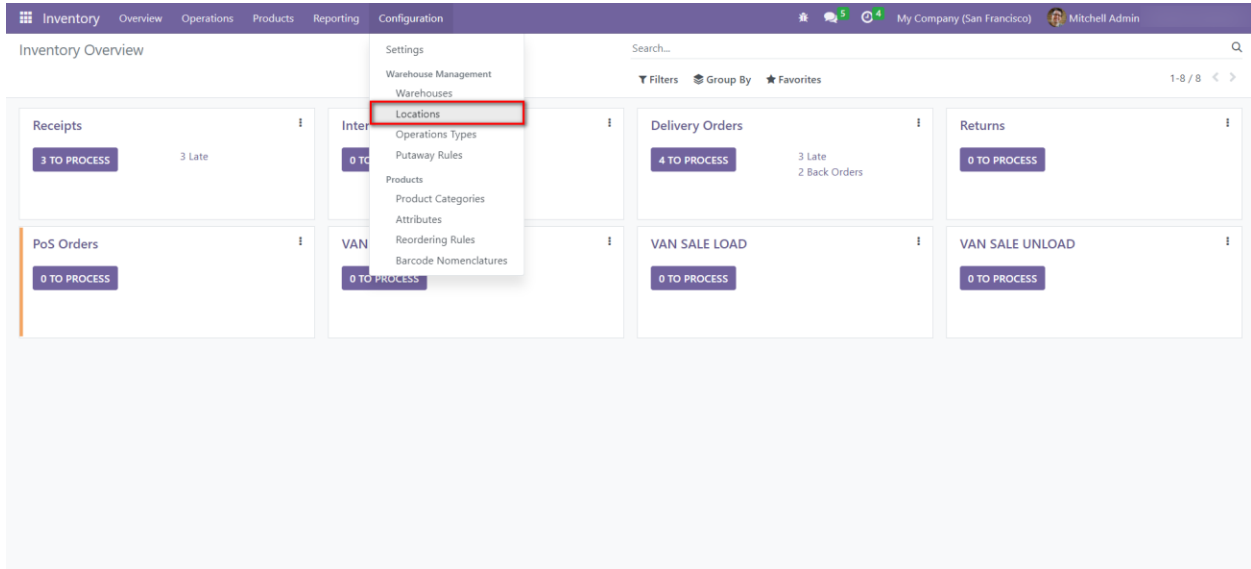
- Go to *Settings* -> *Inventory*.
- Enable *Storage Locations* checkbox -> *Save*.



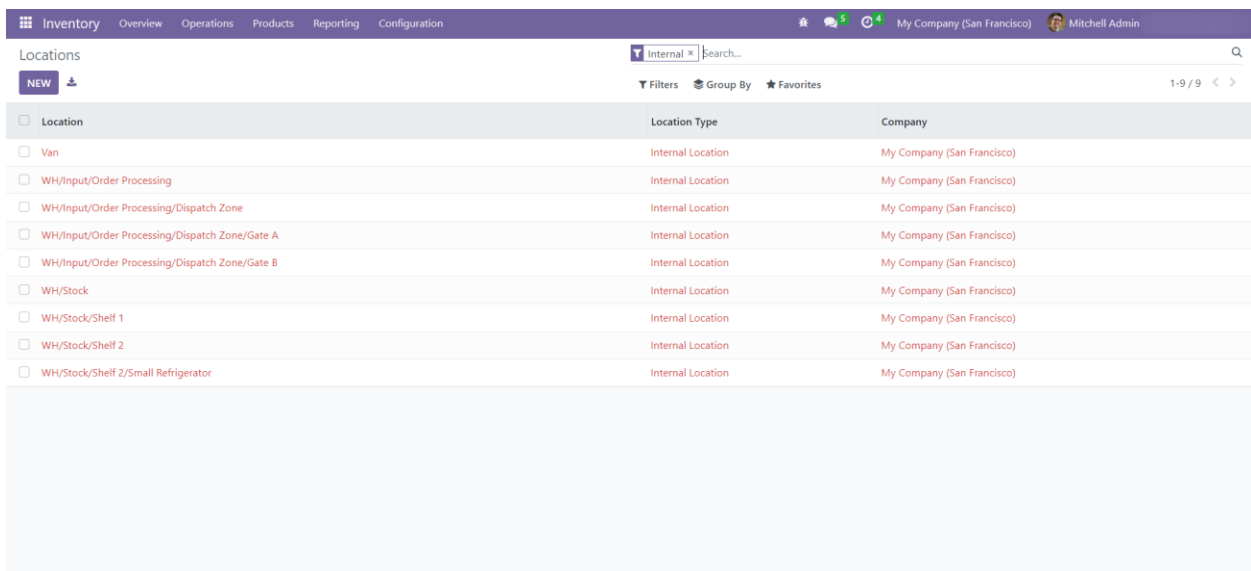
The screenshot displays the 'Settings' page for the Van Sales POS Plugin. The left sidebar shows navigation options: General Settings, Inventory, Invoicing, Fleet, and Point of Sale. The main content area is divided into sections: 'General Settings' (with sub-sections for traceability and expiration dates), 'Valuation' (with sub-sections for landed costs and invoice display), and 'Warehouse' (with sub-sections for storage locations and multi-step routes). The 'Storage Locations' checkbox is checked and highlighted with a red box. Below it, there are links for 'Locations' and 'Putaway Rules'. The 'Multi-Step Routes' checkbox is unchecked.

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

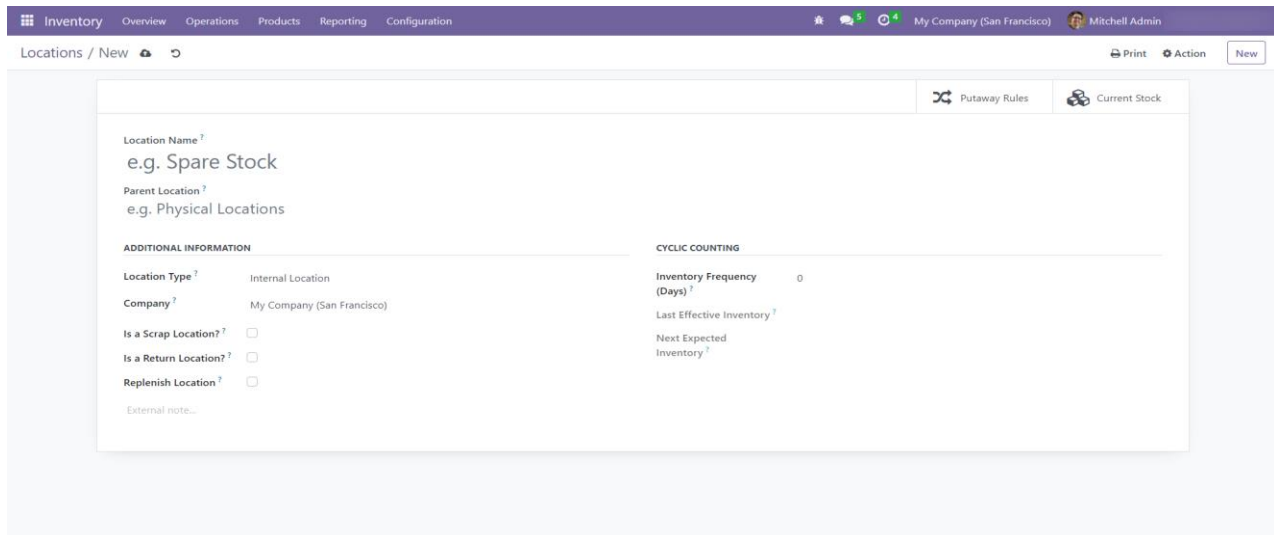
- Go to *Inventory*.
- Navigate to *Configuration* -> *Locations*.



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



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



Inventory Overview | Overview | Operations | Products | Reporting | Configuration | My Company (San Francisco) | Mitchell Admin

Locations / New

Putaway Rules | Current Stock

Location Name? e.g. Spare Stock

Parent Location? e.g. Physical Locations

ADDITIONAL INFORMATION

Location Type? Internal Location

Company? My Company (San Francisco)

Is a Scrap Location?

Is a Return Location?

Replenish Location?

External note...

CYCLIC COUNTING

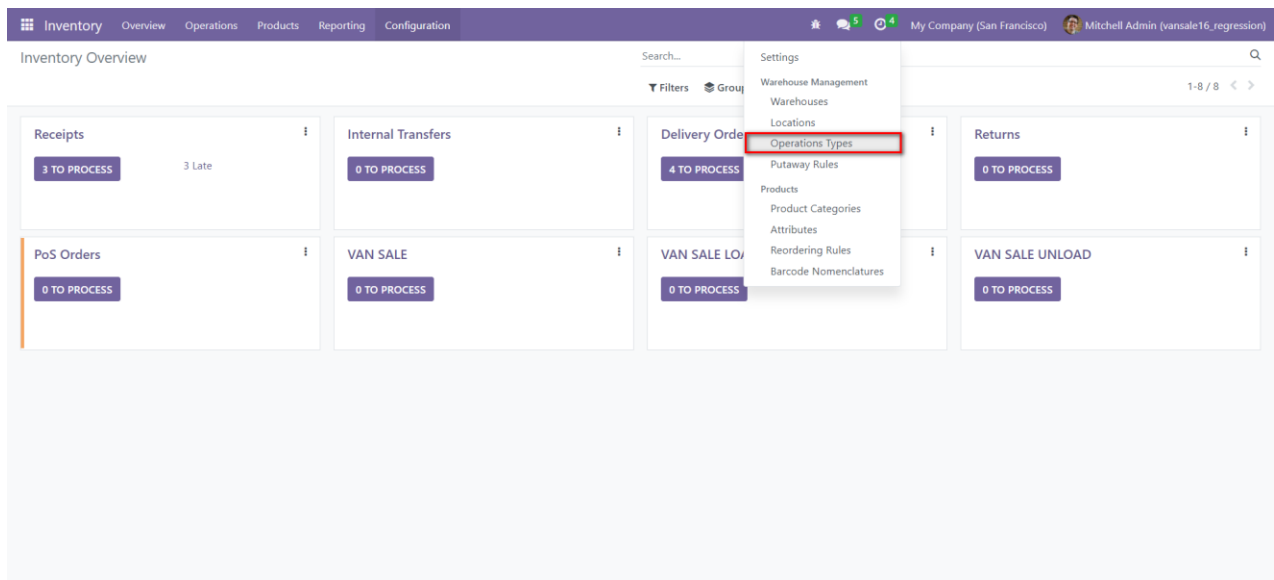
Inventory Frequency (Days)? 0

Last Effective Inventory?

Next Expected Inventory?

Screenshot 6: Van point of sale - operation types:

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



Inventory Overview | Overview | Operations | Products | Reporting | Configuration | My Company (San Francisco) | Mitchell Admin (vansale16_regression)

Search...

Filters | Group

1-8 / 8 < >

Receipts 3 TO PROCESS 3 Late

Internal Transfers 0 TO PROCESS

Delivery Order 4 TO PROCESS

Returns 0 TO PROCESS

PoS Orders 0 TO PROCESS

VAN SALE 0 TO PROCESS

VAN SALE LO 0 TO PROCESS

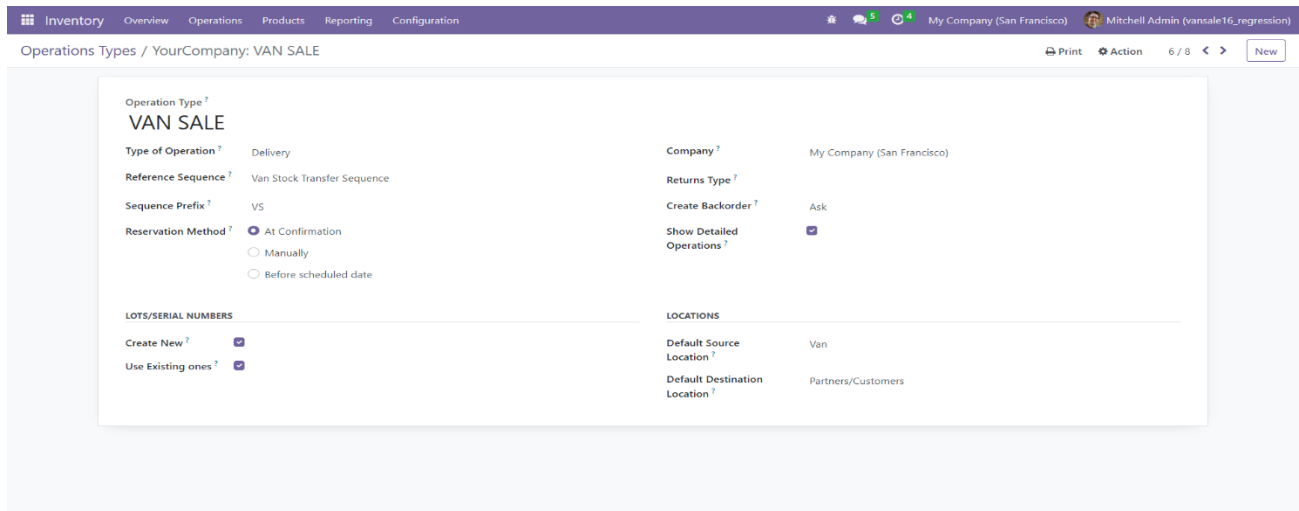
VAN SALE UNLOAD 0 TO PROCESS

Settings

- Warehouse Management
- Warehouses
- Locations
- Operations Types
- Putaway Rules
- Products
- Product Categories
- Attributes
- Reordering Rules
- Barcode Nomenclatures

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

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



Inventory Overview Operations Products Reporting Configuration My Company (San Francisco) Mitchell Admin (vansale16_regression)

Operations Types / YourCompany: VAN SALE

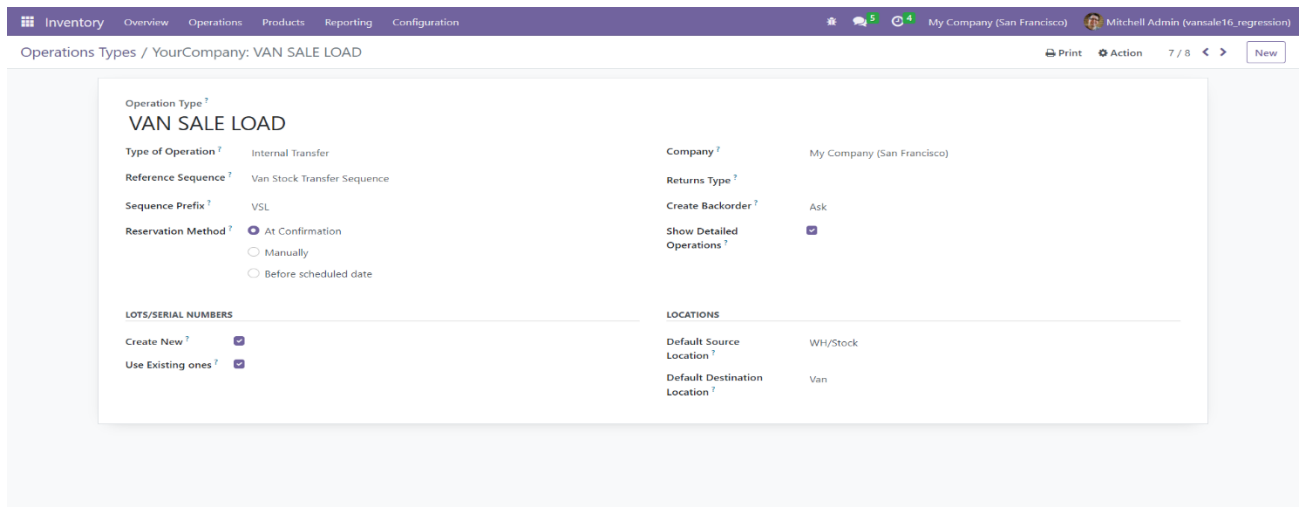
Operation Type [?]
VAN SALE

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

LOTS/SERIAL NUMBERS		LOCATIONS	
Create New [?]	<input checked="" type="checkbox"/>	Default Source Location [?]	Van
Use Existing ones [?]	<input checked="" type="checkbox"/>	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.



Inventory Overview Operations Products Reporting Configuration My Company (San Francisco) Mitchell Admin (vansale16_regression)

Operations Types / YourCompany: VAN SALE LOAD

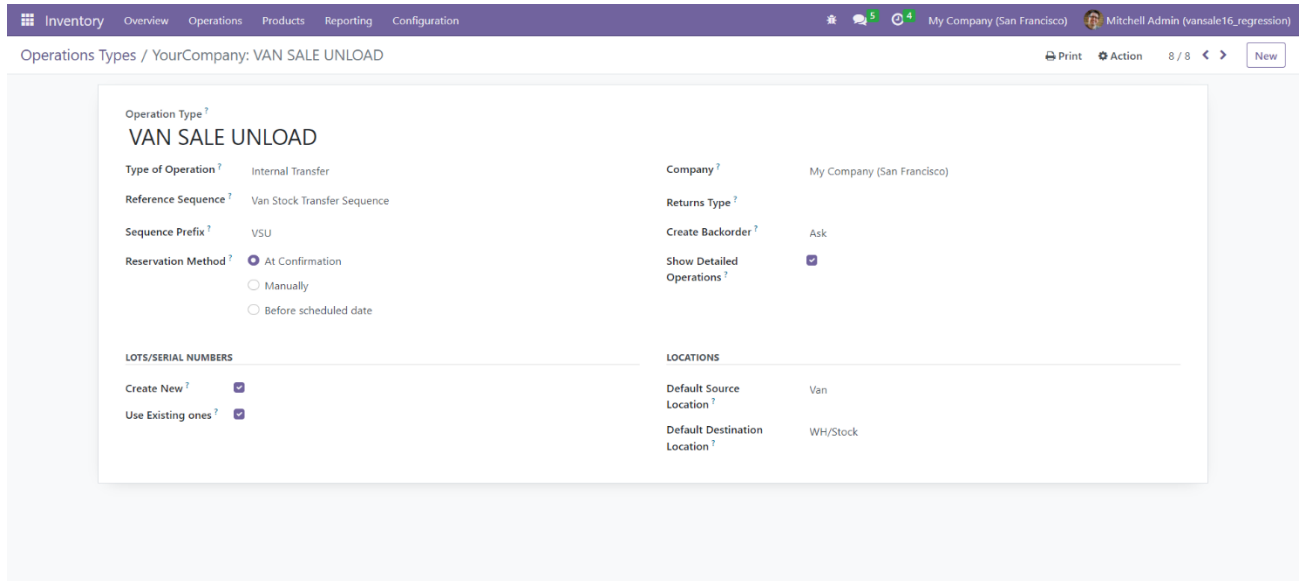
Operation Type [?]
VAN SALE LOAD

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

LOTS/SERIAL NUMBERS		LOCATIONS	
Create New [?]	<input checked="" type="checkbox"/>	Default Source Location [?]	WH/Stock
Use Existing ones [?]	<input checked="" type="checkbox"/>	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)'.

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

LOTS/SERIAL NUMBERS

Create New[?]

Use Existing ones[?]

Company[?] My Company (San Francisco)

Returns Type[?]

Create Backorder[?] Ask

Show Detailed Operations[?]

LOCATIONS

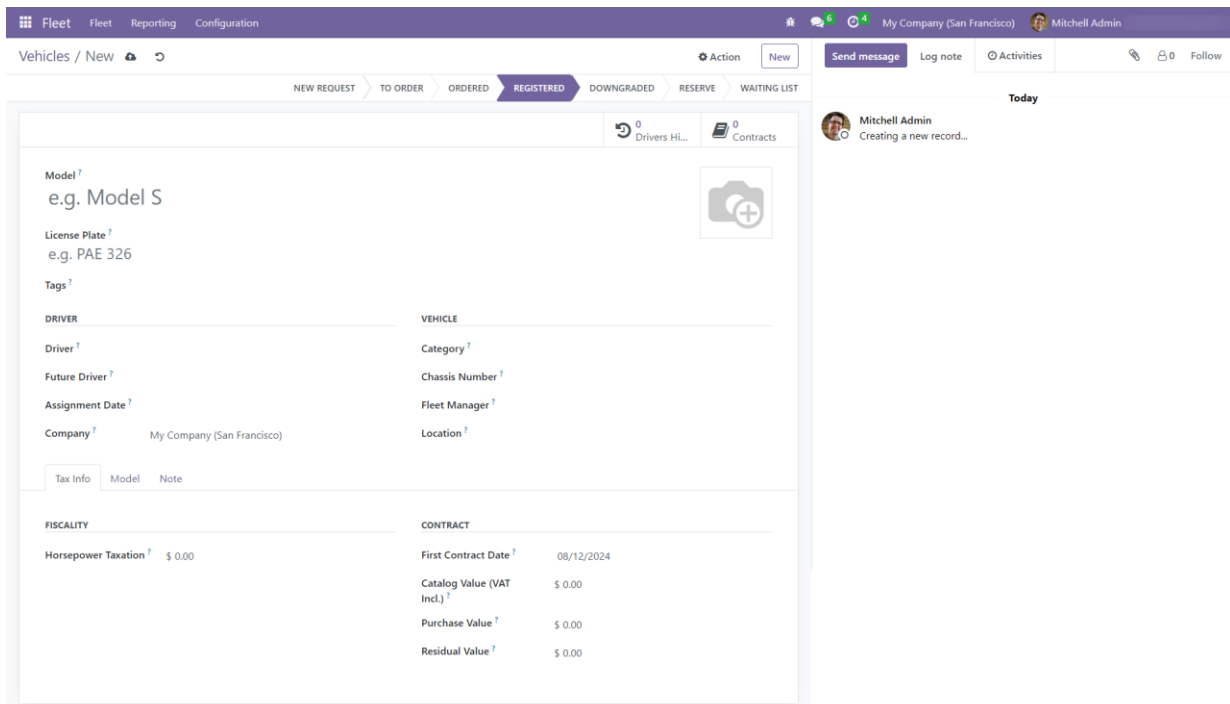
Default Source Location[?] Van

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.



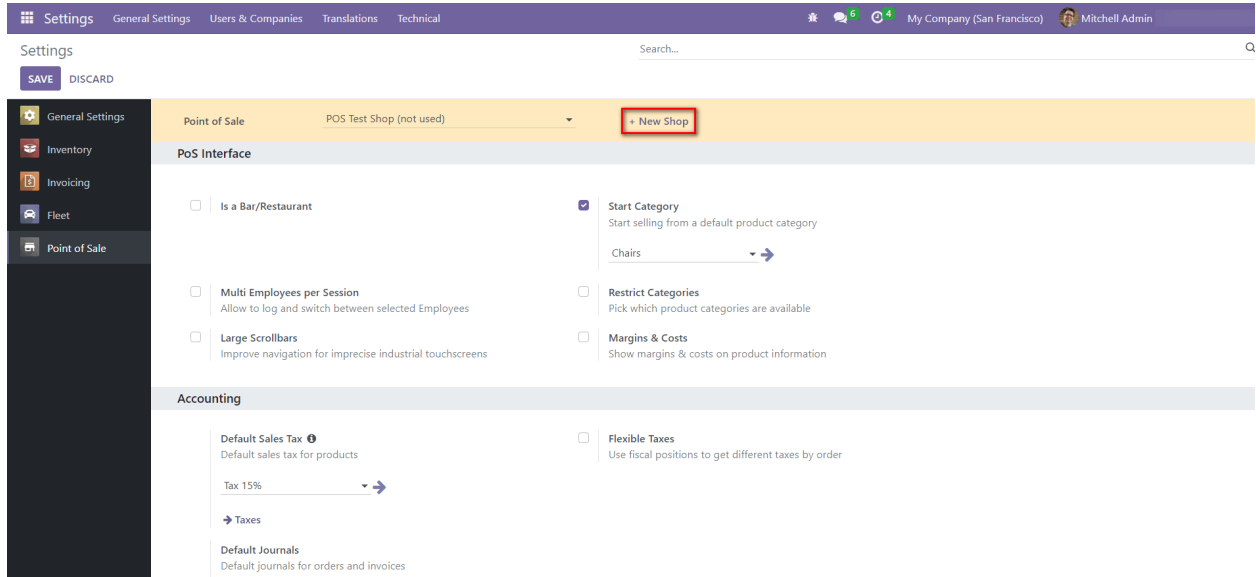
The screenshot displays the 'Vehicles / New' form in the Fleet management module. The interface includes a navigation bar with 'Fleet', 'Reporting', and 'Configuration' tabs. The main content area is divided into sections for 'DRIVER', 'VEHICLE', 'FISCALITY', and 'CONTRACT'. The 'DRIVER' section includes fields for Driver, Future Driver, Assignment Date, and Company. The 'VEHICLE' section includes fields for Category, Chassis Number, Fleet Manager, and Location. The 'FISCALITY' section includes Horsepower Taxation. The 'CONTRACT' section includes First Contract Date, Catalog Value (VAT Incl.), Purchase Value, and Residual Value. The form is currently in the 'REGISTERED' state, and the user 'Mitchell Admin' is logged in.

DRIVER		VEHICLE	
Model [?]	e.g. Model S	Category [?]	
License Plate [?]	e.g. PAE 326	Chassis Number [?]	
Tags [?]		Fleet Manager [?]	
Driver [?]		Location [?]	
Future Driver [?]			
Assignment Date [?]			
Company [?]	My Company (San Francisco)		

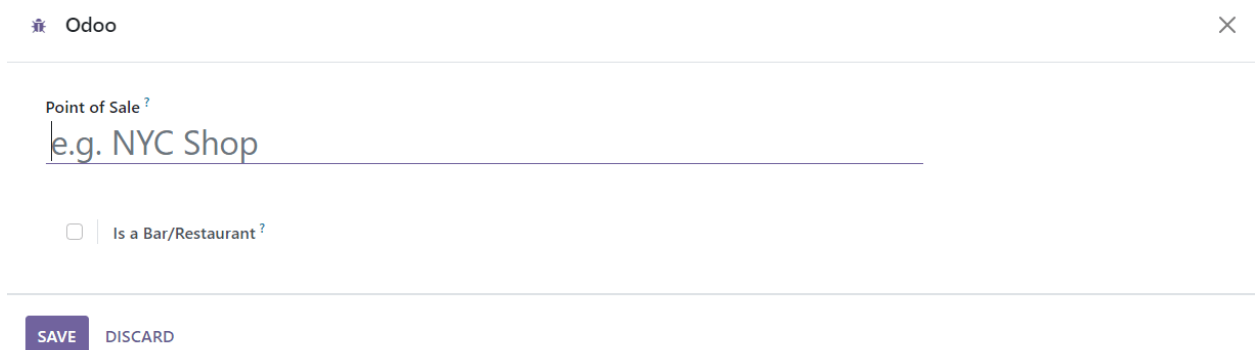
FISCALITY		CONTRACT	
Horsepower Taxation [?]	\$ 0.00	First Contract Date [?]	08/12/2024
		Catalog Value (VAT Incl.) [?]	\$ 0.00
		Purchase Value [?]	\$ 0.00
		Residual Value [?]	\$ 0.00

Screenshot 11: Create a new Point of Sale:

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

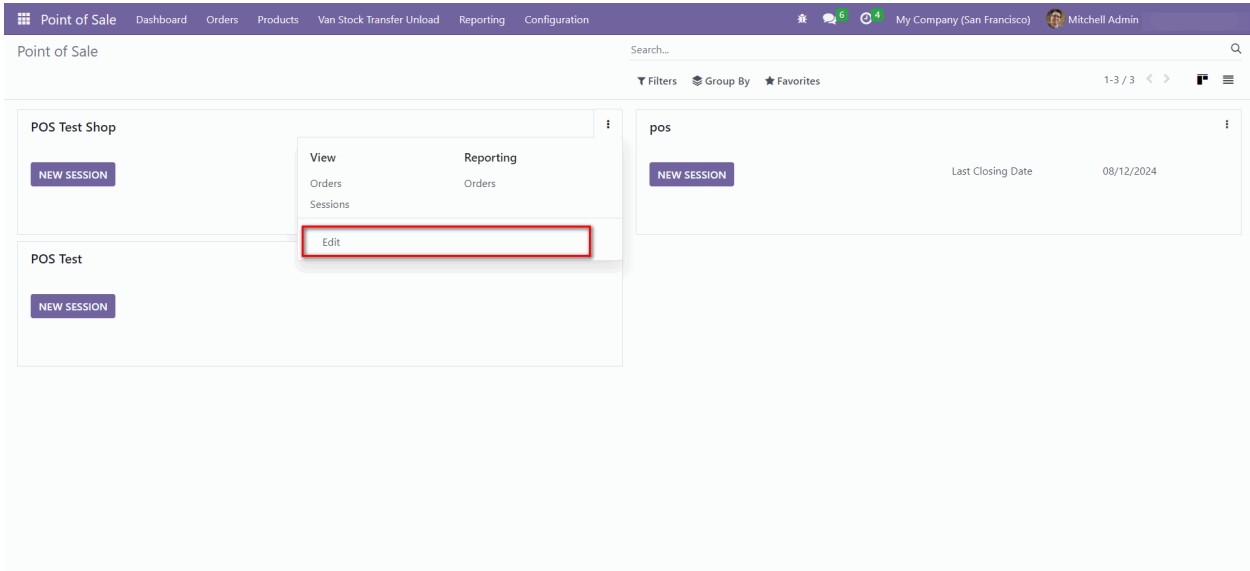


Screenshot 12: Enter new POS details:



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

IoT Box ?
Connect devices using an IoT Box

More settings: [Configurations > Settings](#)

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

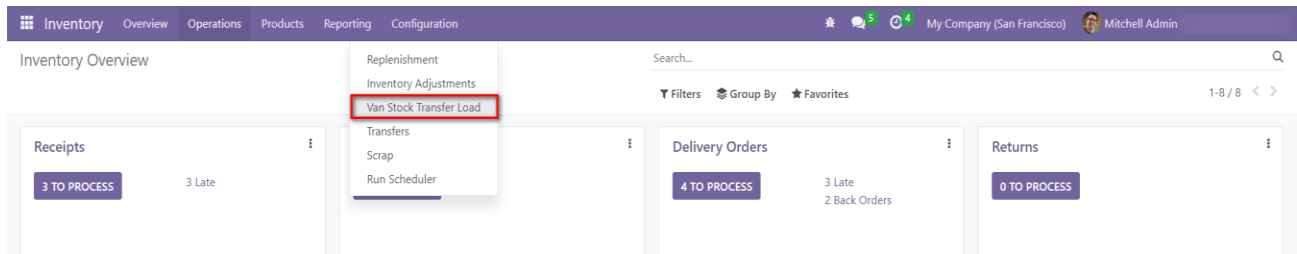
Operation Type(Unload) ?
Operation type used to record product pickings
Products will be taken from the default source location of this operation type

YourCompany: VAN SALE L

SAVE DISCARD

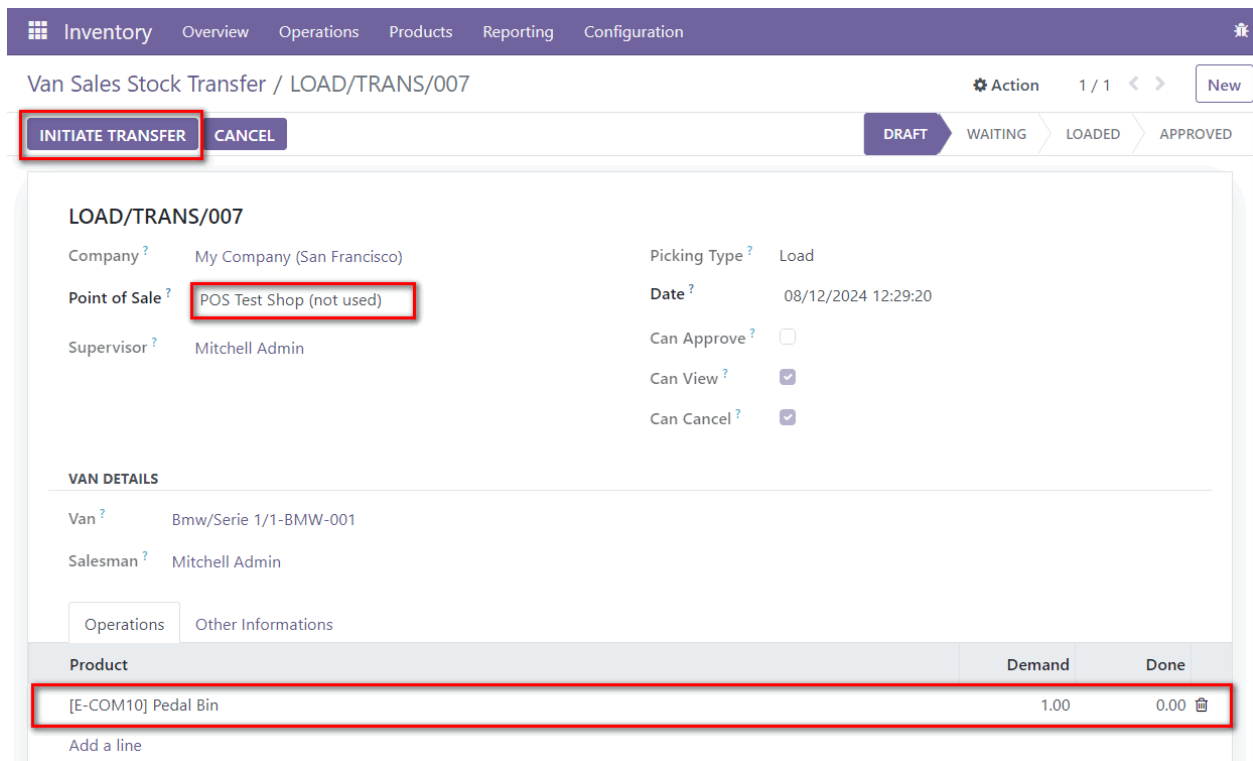
Screenshot 15: Van point of sale - Van Stock Transfer Load:

- 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.



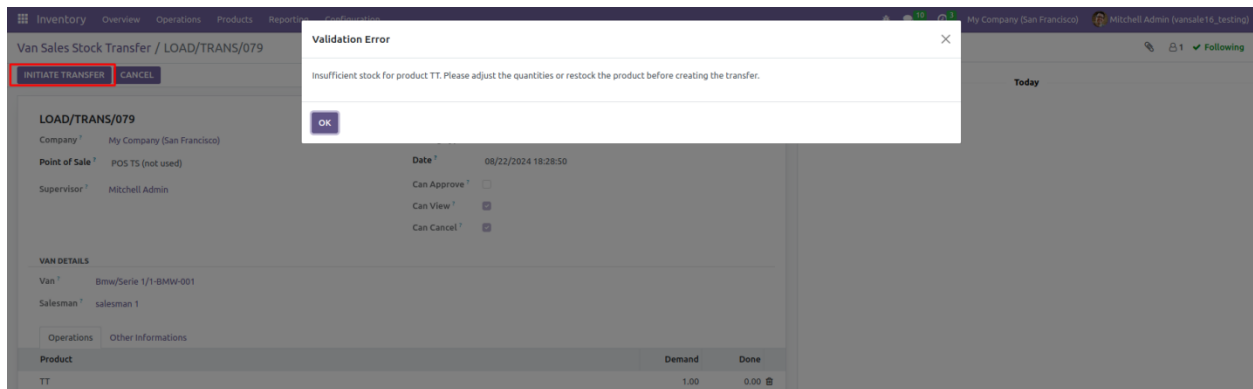
Screenshot 16: Van point of sale – Create Van Stock Transfer Load:

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

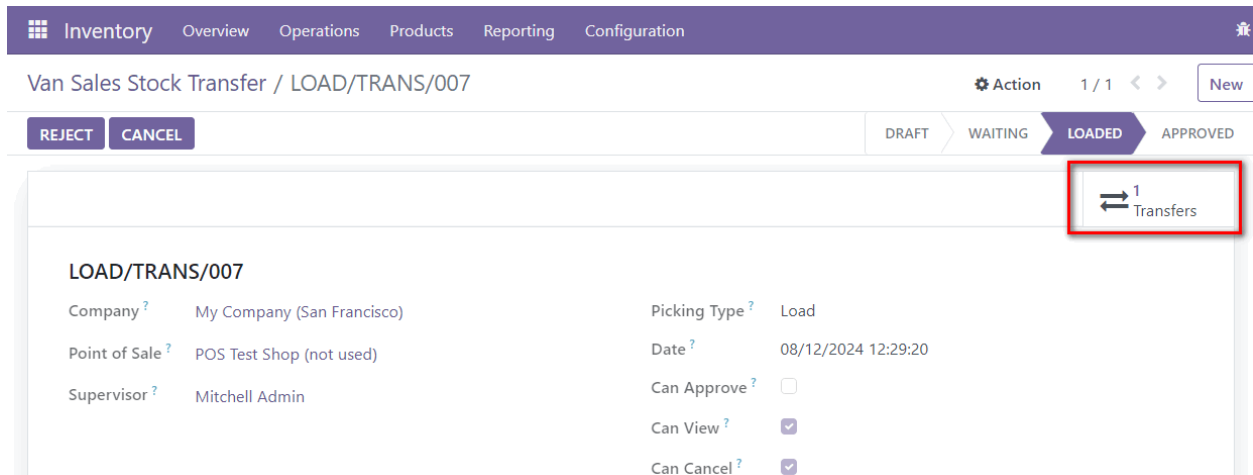


Screenshot 17: When we do not have enough stock for the Product it will not let us initiate the transfer, it will raise validation.

- While initiating the transfer.

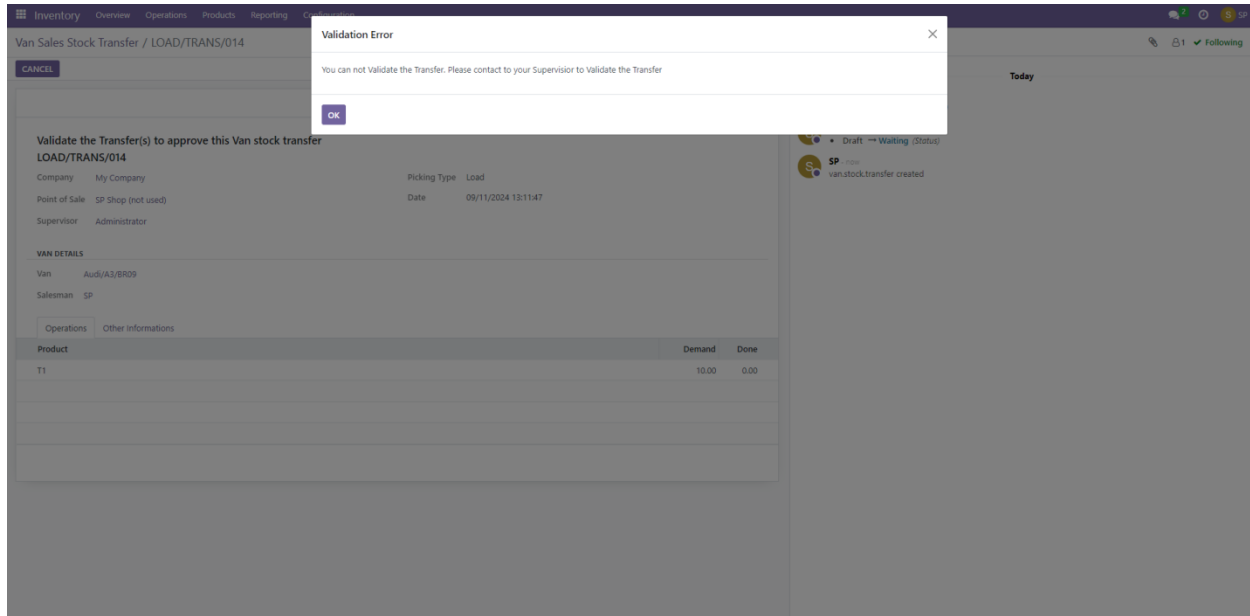


Screenshot 18: Van point of sale – View the created transfer if we have enough stock then transfer will be initiated:

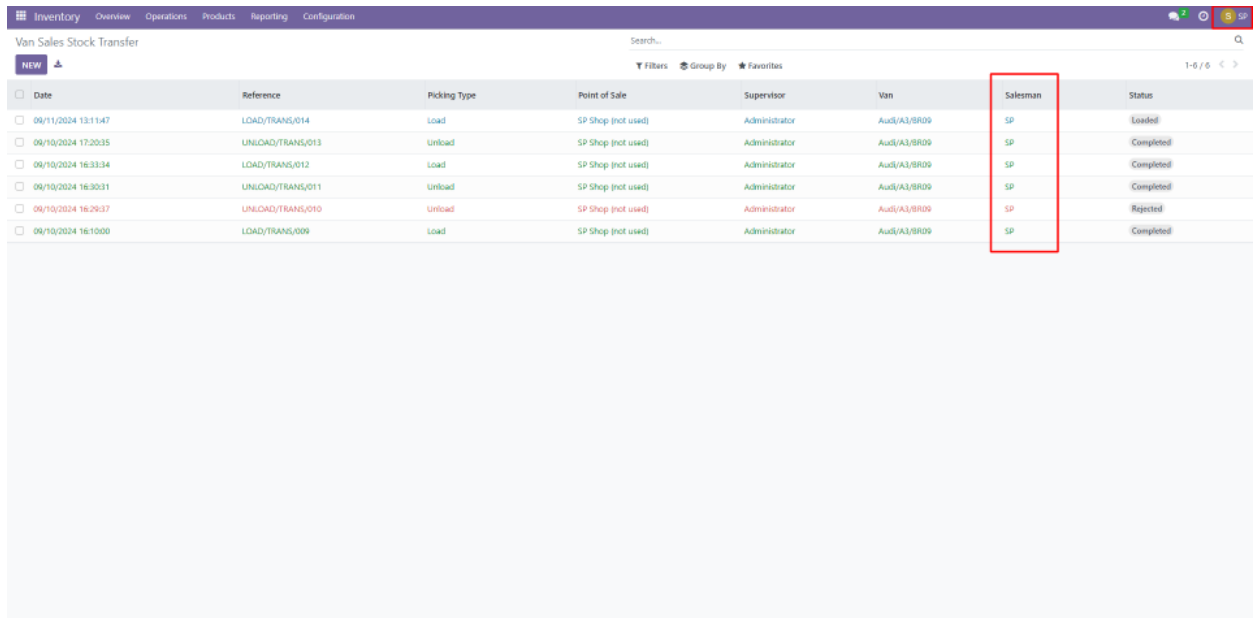


Screenshot 19: Van point of sale – logged in as a salesman.

- 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.



Inventory Overview Operations Products Reporting Configuration

Van Sales Stock Transfer

NEW

Search...

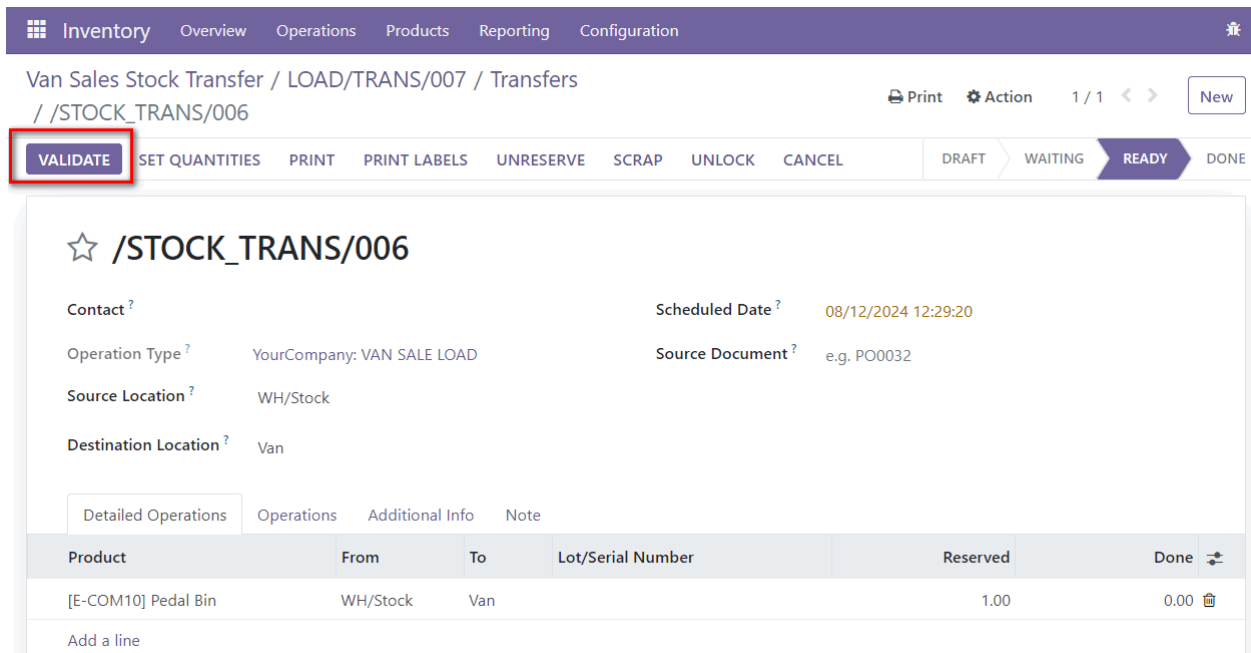
Filters Group By Favorites

1-6/6

Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
09/11/2024 13:11:47	LOAD/TRANS/014	Load	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Loaded
09/10/2024 17:20:35	UNLOAD/TRANS/013	Unload	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Completed
09/10/2024 16:33:34	LOAD/TRANS/012	Load	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Completed
09/10/2024 16:30:31	UNLOAD/TRANS/011	Unload	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Completed
09/10/2024 16:29:37	UNLOAD/TRANS/010	Unload	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Rejected
09/10/2024 16:10:00	LOAD/TRANS/009	Load	SP Shop (not used)	Administrator	Aud/A3/BR09	SP	Completed

Screenshot 20: Van point of sale – Validate transfer:

- Only Supervisor can validate the transfer.



Inventory Overview Operations Products Reporting Configuration

Van Sales Stock Transfer / LOAD/TRANS/007 / Transfers / /STOCK_TRANS/006

Print Action 1/1 < > New

VALIDATE SET QUANTITIES PRINT PRINT LABELS UNRESERVE SCRAP UNLOCK CANCEL DRAFT WAITING **READY** DONE

☆ /STOCK_TRANS/006

Contact? Scheduled Date? 08/12/2024 12:29:20

Operation Type? YourCompany: VAN SALE LOAD Source Document? e.g. PO0032

Source Location? WH/Stock

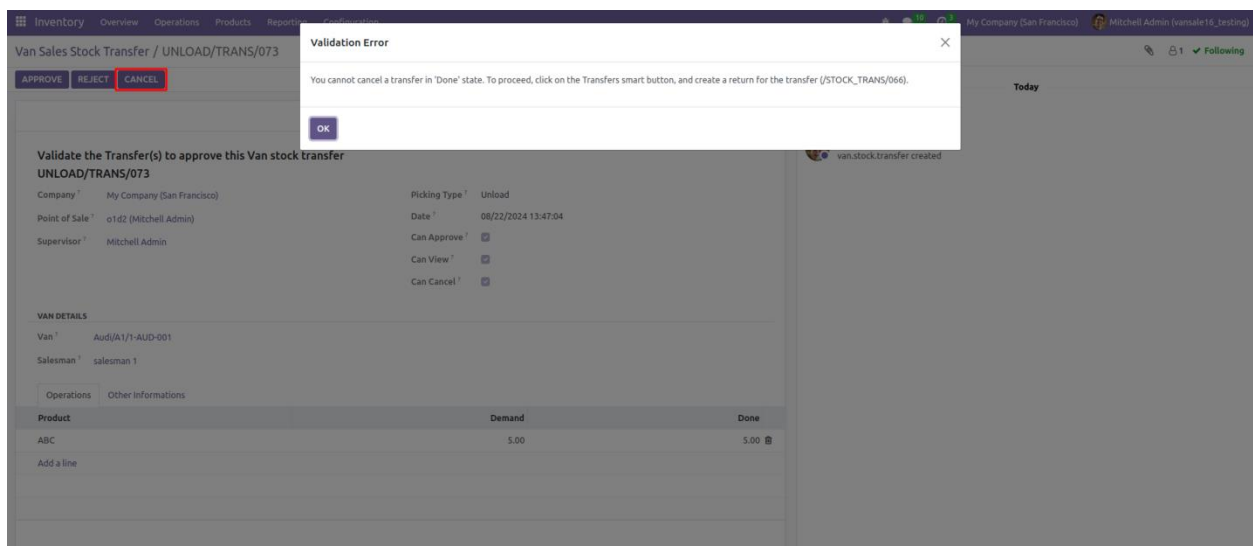
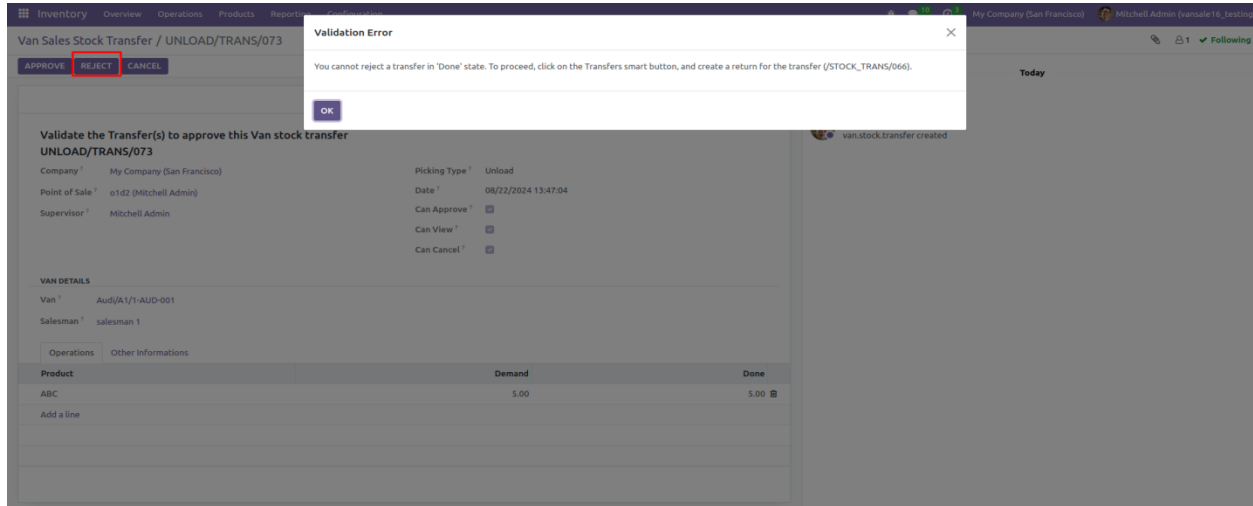
Destination Location? Van

Detailed Operations Operations Additional Info Note

Product	From	To	Lot/Serial Number	Reserved	Done
[E-COM10] Pedal Bin	WH/Stock	Van		1.00	0.00
Add a line					

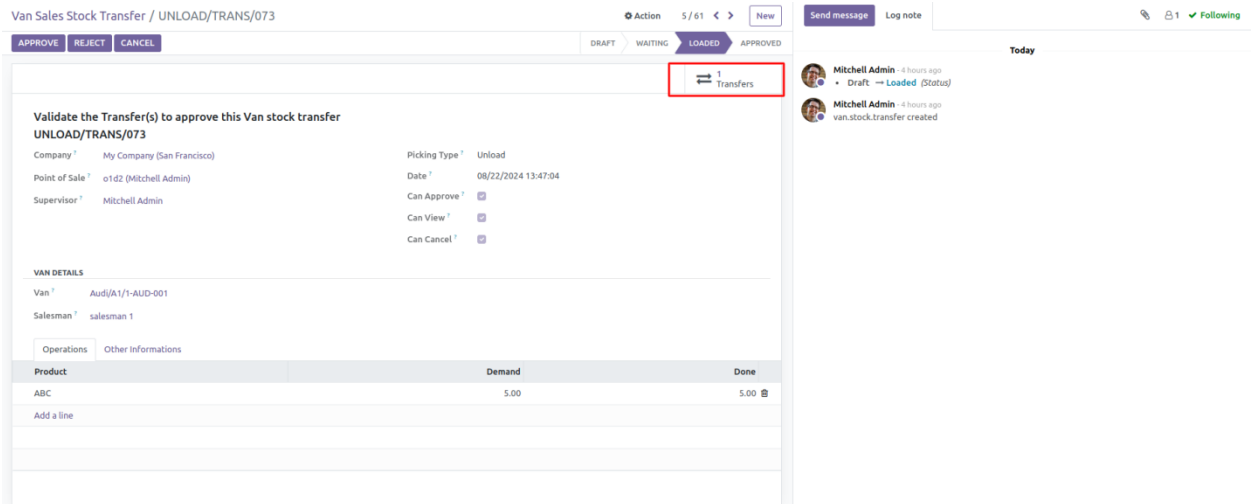
Screenshot 21: Before 'Approve' If we want to reject or cancel the Transfer - Once transfer is validated you cannot reject and cancel the load it will raise validation.

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



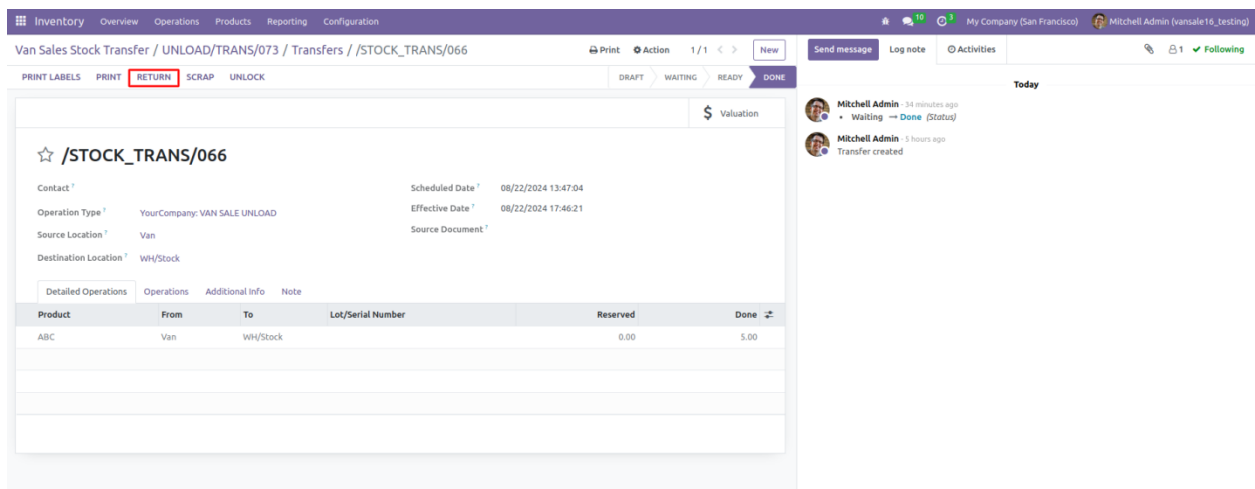
Screenshot 22: In case of Reject and Cancel getting stock back to Warehouse – Create Return.

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



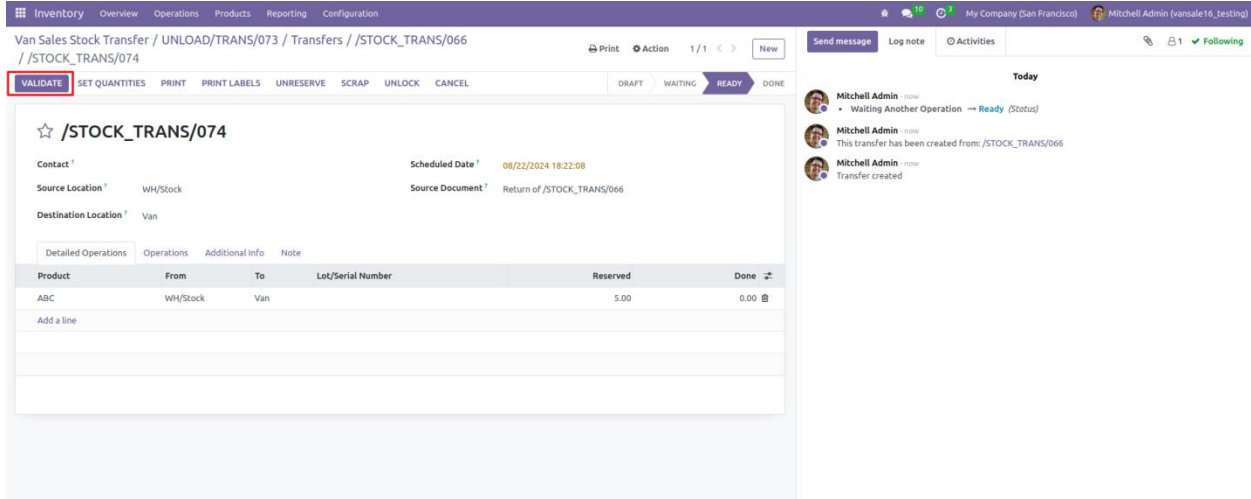
Screenshot 23: Create Return:

- Click on return button.



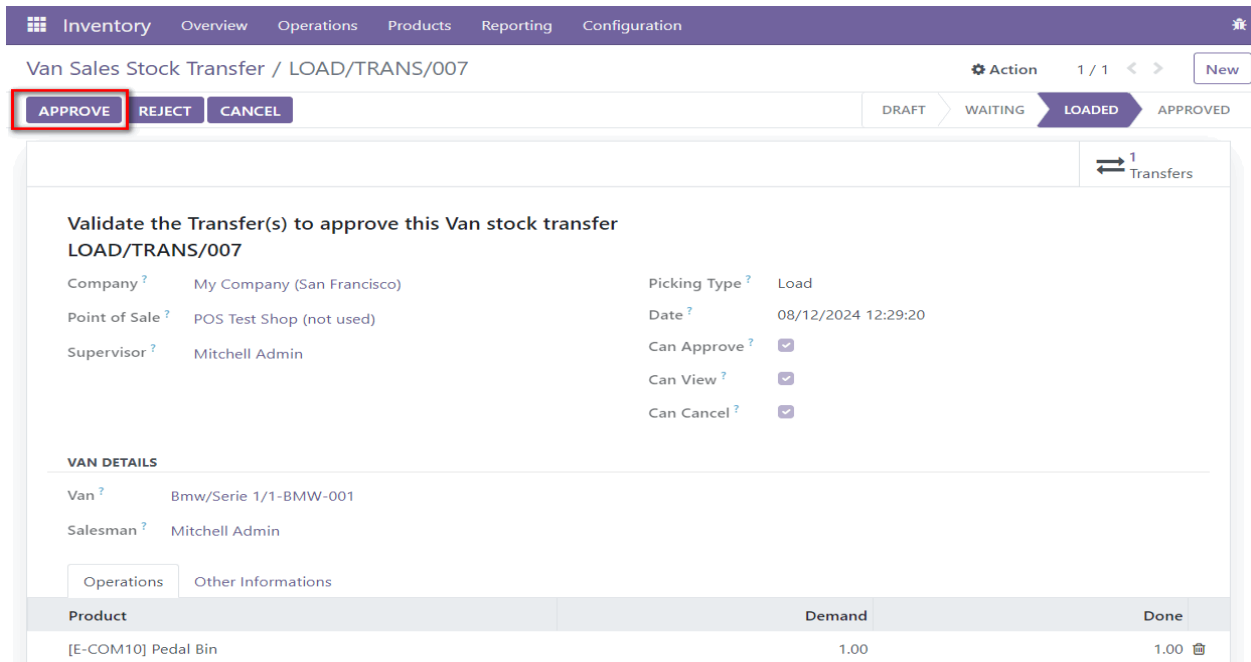
Screenshot 24: Validate the Return:

- Stock will be moved to warehouse.

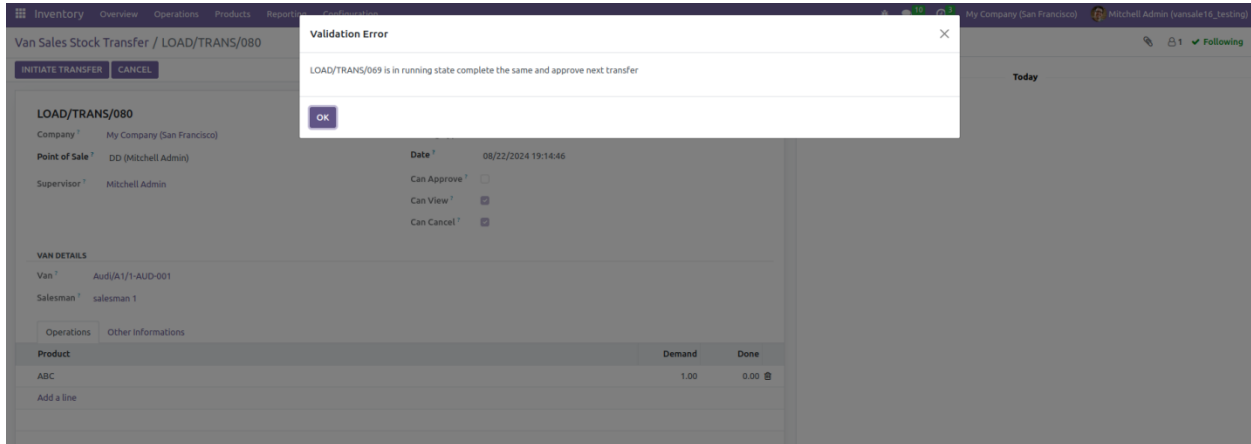


Screenshot 25: Van point of sale – Load Transfer Approval:

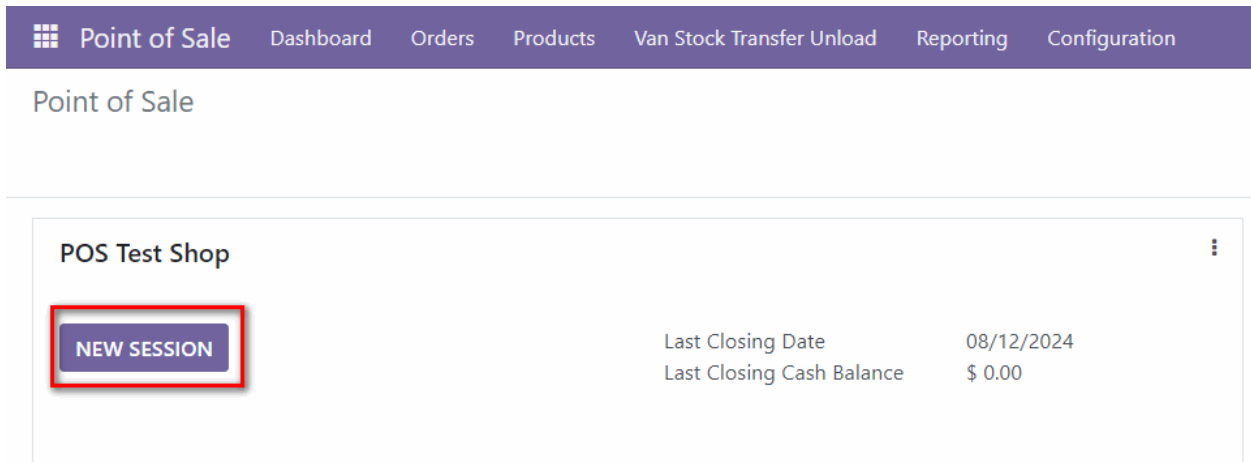
- Go back to *Load Transfer* record.
- Only Supervisor can approve the *Load Transfer*.
- Click *Approve*.



Screenshot 26: 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.

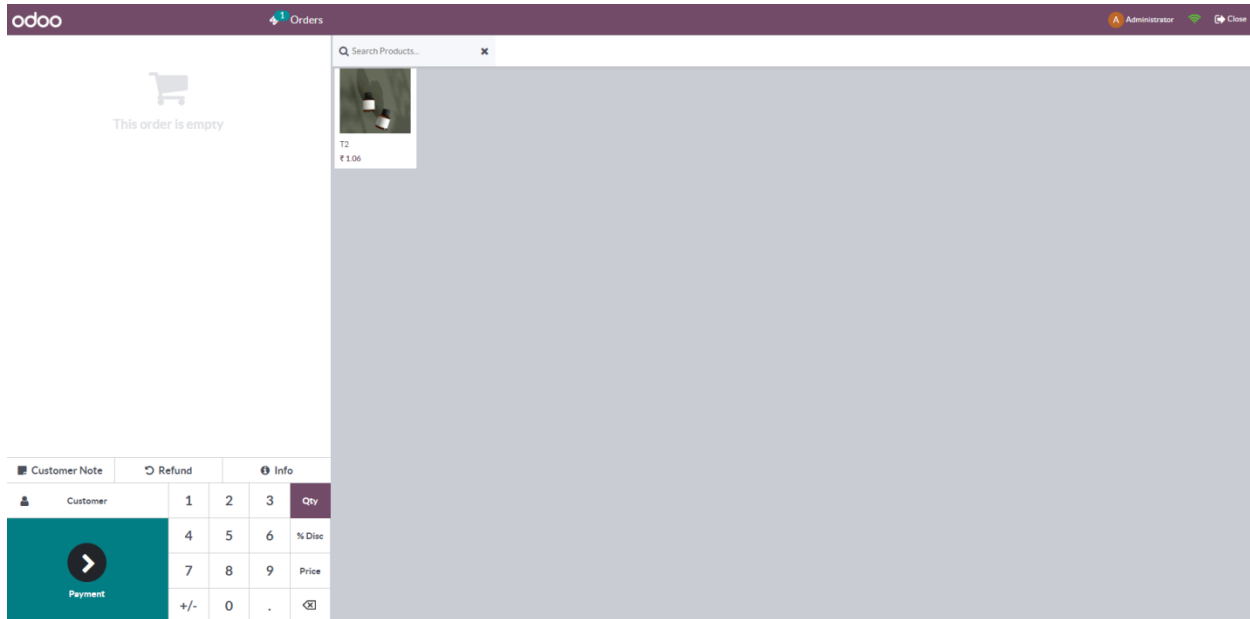


Screenshot 27: Van point of sale – Open new POS session:



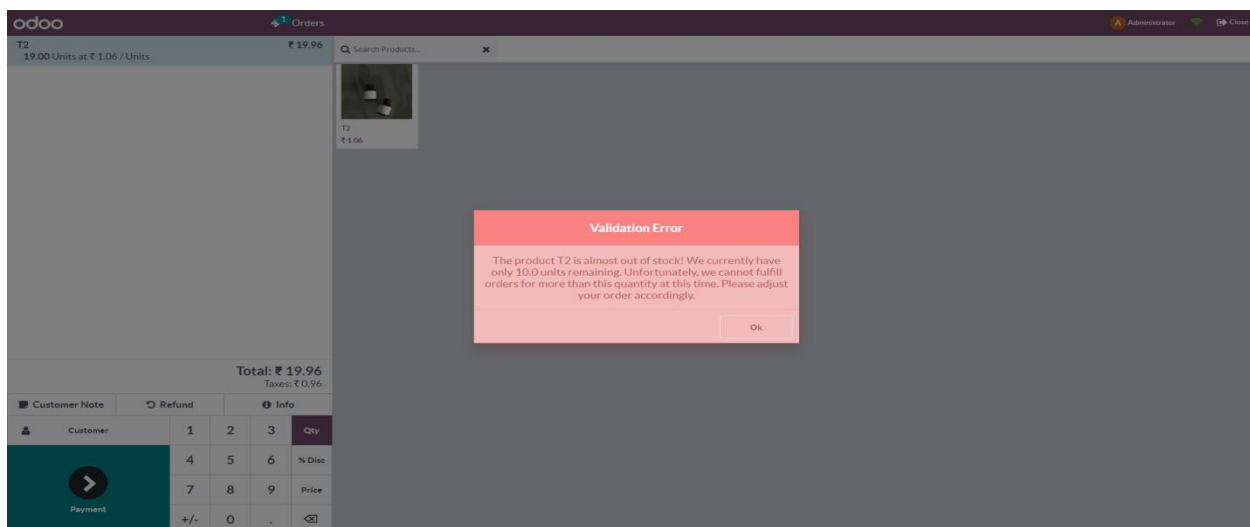
Screenshot 28: Van point of sale Sell the loaded products:

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



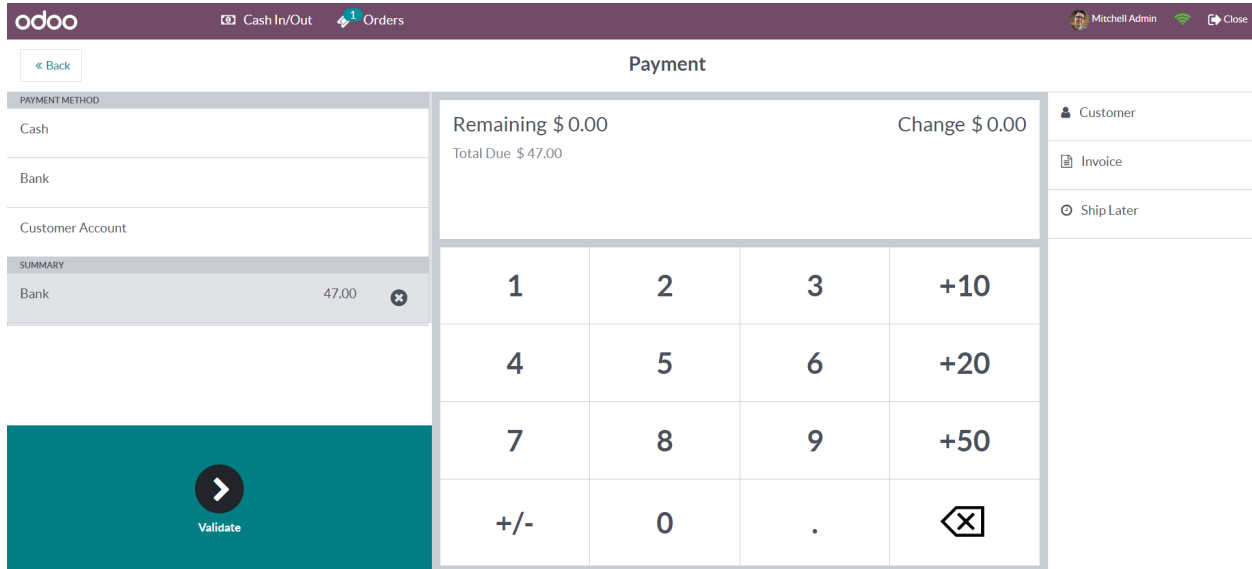
Screenshot 29: Van point of sale, Sell the loaded products

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



Screenshot 30: Van point of sale, Sell the loaded products:

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



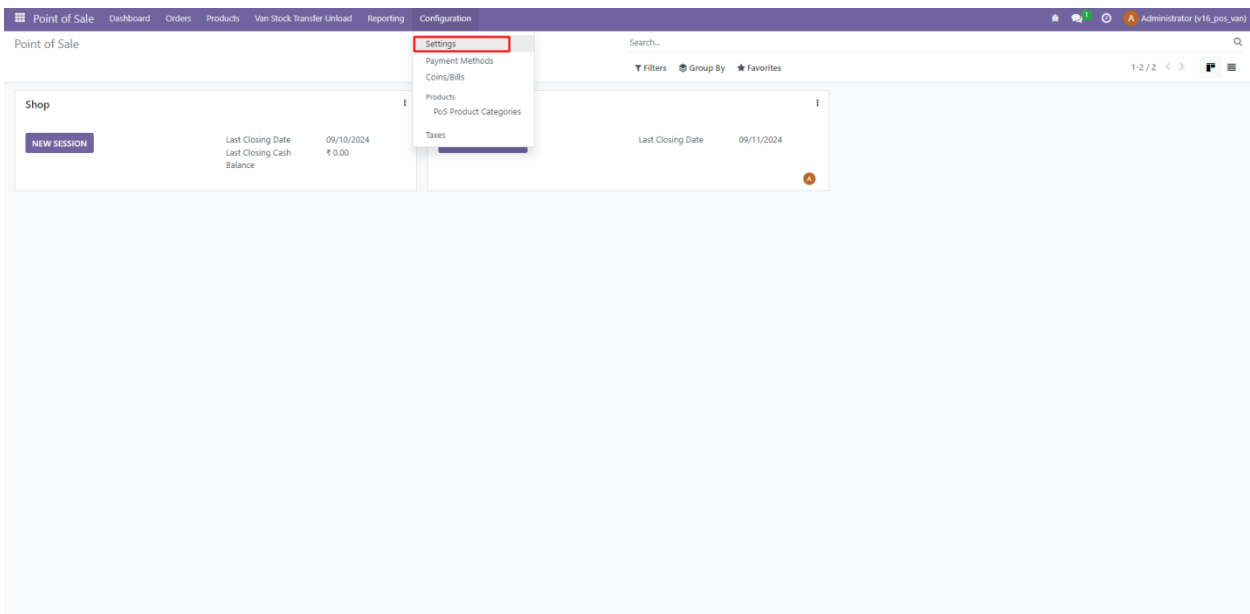
The screenshot shows the Odoo POS 'Payment' interface. At the top, the header includes 'odoo', 'Cash In/Out', 'Orders', and user information 'Mitchell Admin'. A '< Back' button is visible in the top left. The main area is divided into several sections:

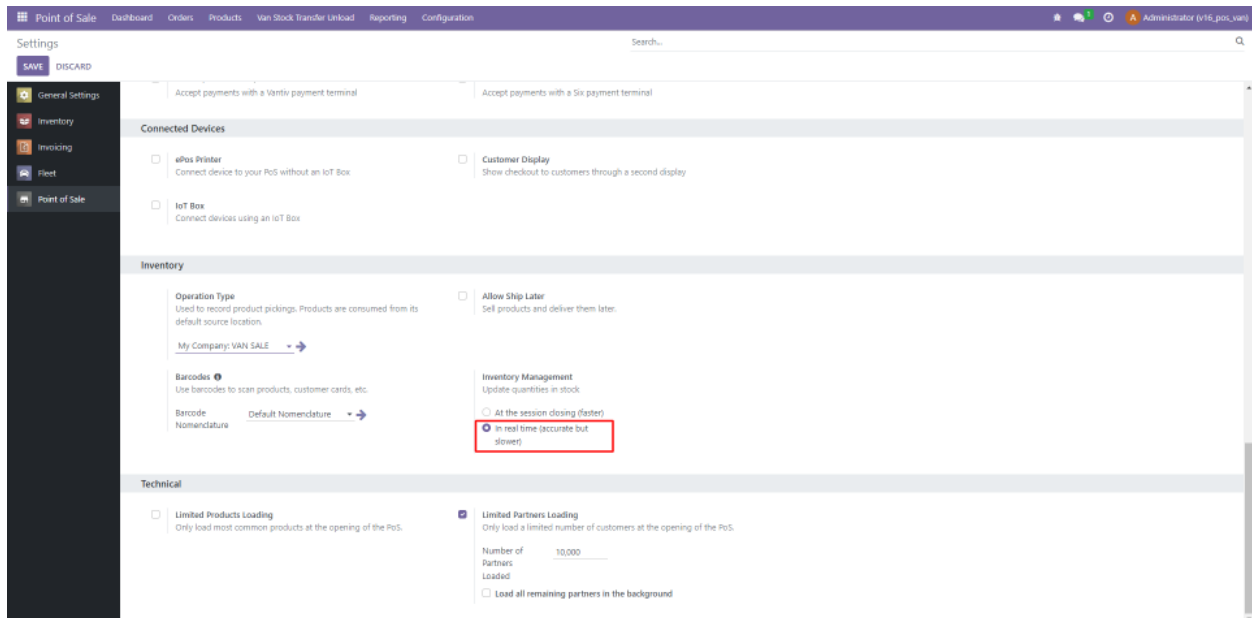
- PAYMENT METHOD:** A list of options including 'Cash', 'Bank', and 'Customer Account'.
- SUMMARY:** A table showing the selected payment method 'Bank' with a value of '47.00' and a close icon.
- Payment Summary:** A central area displaying 'Remaining \$ 0.00' and 'Change \$ 0.00', with 'Total Due \$ 47.00' below it.
- Customer Actions:** A vertical list on the right with options: 'Customer', 'Invoice', and 'Ship Later'.
- Numeric Keypad:** A grid of buttons for digits 1-9, '+/-', '0', and a decimal point, along with a 'Validate' button (represented by a right-pointing arrow) and a 'Cancel' button (represented by a square with an 'X').

At the bottom left, there is a large teal button with a white right-pointing arrow and the text 'Validate'.

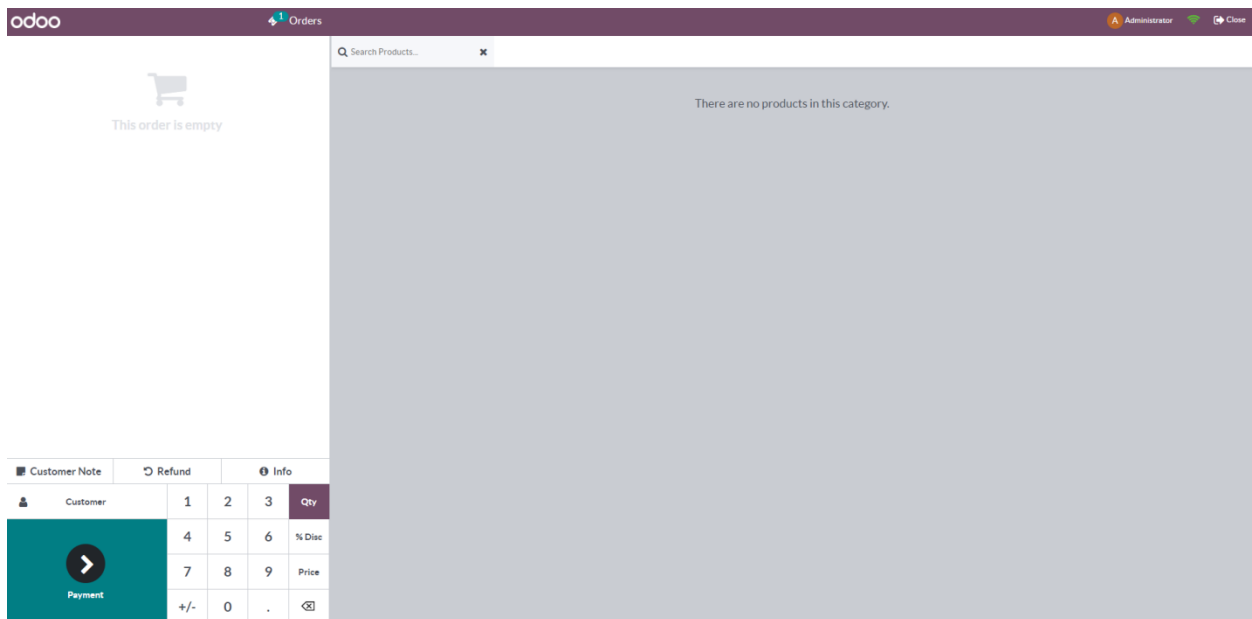
Screenshot 31: For real time stock update:

- Go to POS
- Click Configuration menu.
- Click the *Settings* menu.
- Select In real time (accurate but slower) option.
-

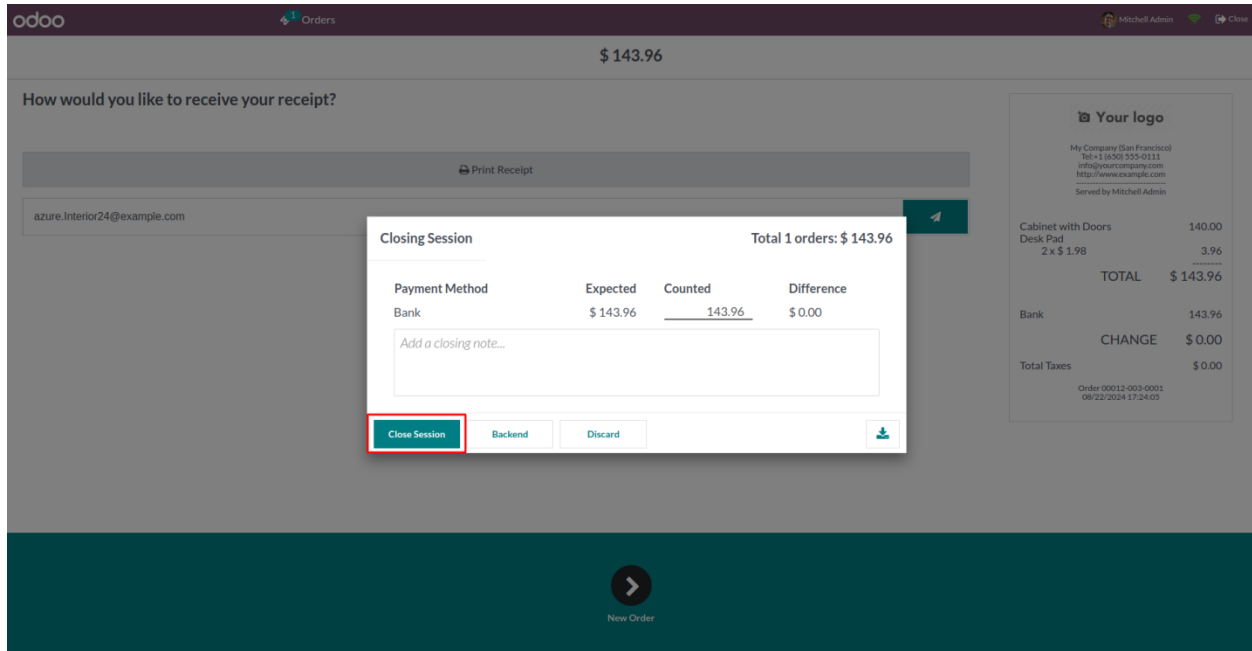




Screenshot 32: When all Loaded Products are Sold it will Updated stock in real time. if we go to product screen it will show Blanck because all the loaded items are sold.

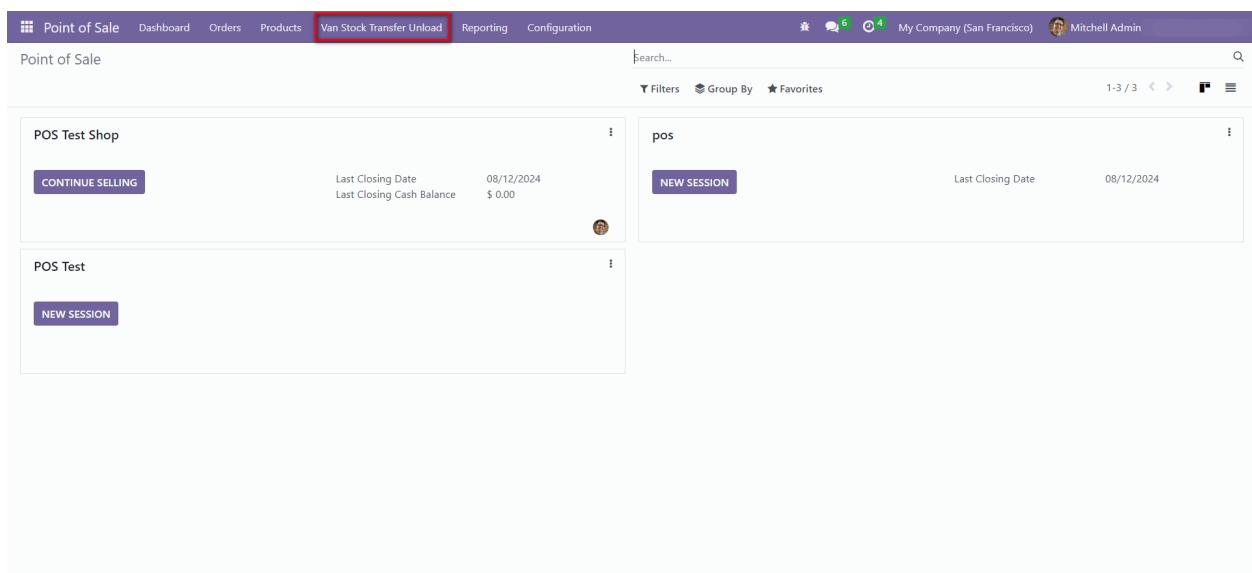


Screenshot 33: When all Loaded Products are Sold, in That case we do not have to create Unload, we can simply close the session. Stock will auto be updated.



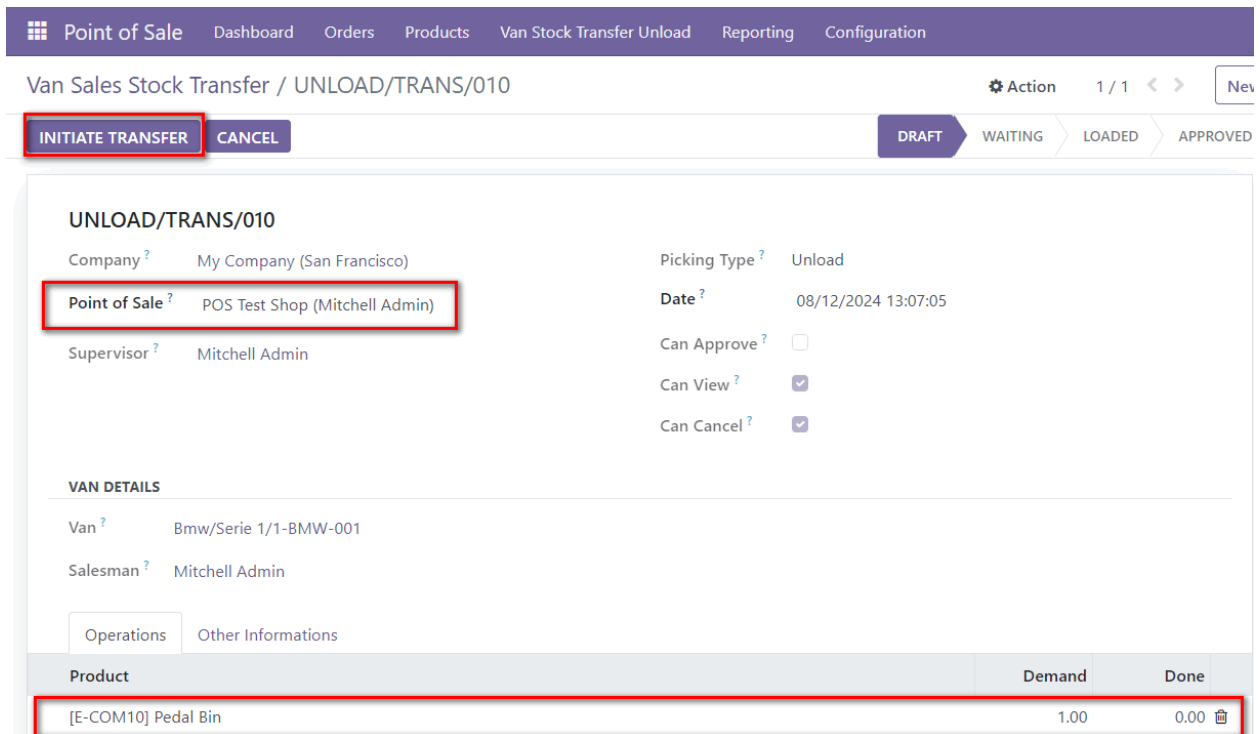
Screenshot 34: Van point of sale Unload transfer to move unsold products to warehouse:

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



Screenshot 35: 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?

Can View?


Can Cancel?

VAN DETAILS

Van? Bmw/Serie 1/1-BMW-001

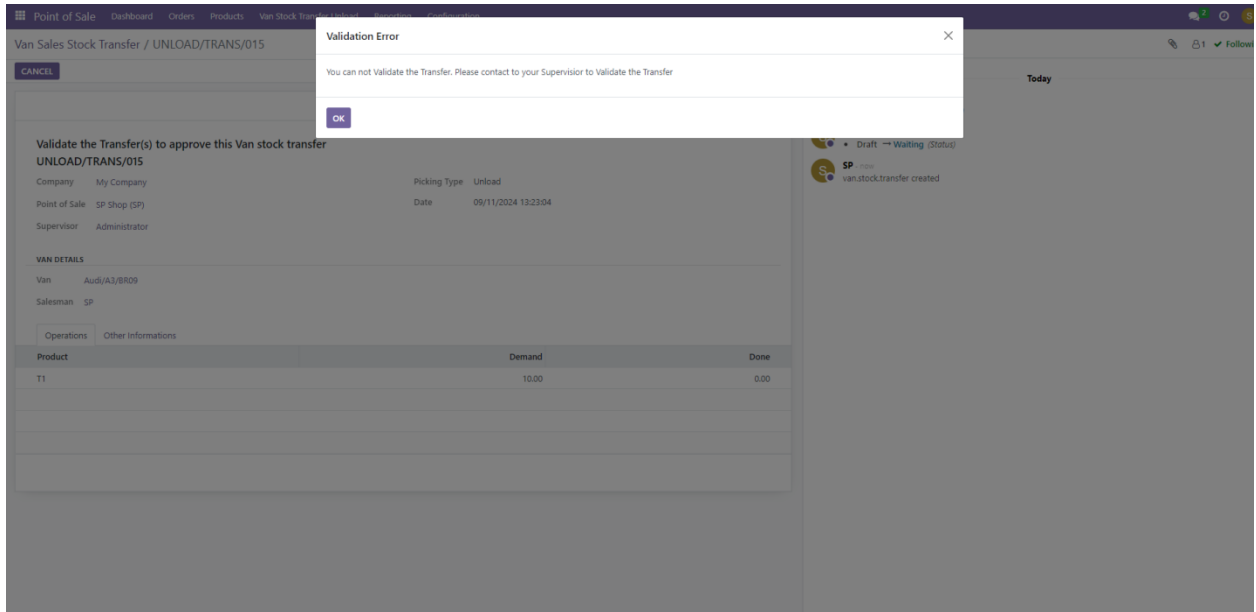
Salesman? Mitchell Admin

Operations Other Informations

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

Screenshot 36: 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.*

Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
09/11/2024 13:23:04	UNLOAD/TRANS/015	Unload	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Loaded
09/11/2024 13:11:47	LOAD/TRANS/014	Load	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Running
09/10/2024 17:20:35	UNLOAD/TRANS/013	Unload	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Completed
09/10/2024 16:33:34	LOAD/TRANS/012	Load	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Completed
09/10/2024 16:30:31	UNLOAD/TRANS/011	Unload	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Completed
09/10/2024 16:29:37	UNLOAD/TRANS/010	Unload	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Rejected
09/10/2024 16:10:00	LOAD/TRANS/009	Load	SP Shop (SP)	Administrator	Audi/A3/B09	SP	Completed

Screenshot 37: Van point of sale – Validate Product Transfer:

- Only Supervisor can Validate the transfer.


Screenshot 38: Van point of sale – Approve Unload Transfer:

- Only Supervisor can Approve the transfer.


Screenshot 39: 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	0 	\$ -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 1.0.2: September 2024

- 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 version.

7. Support

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