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.

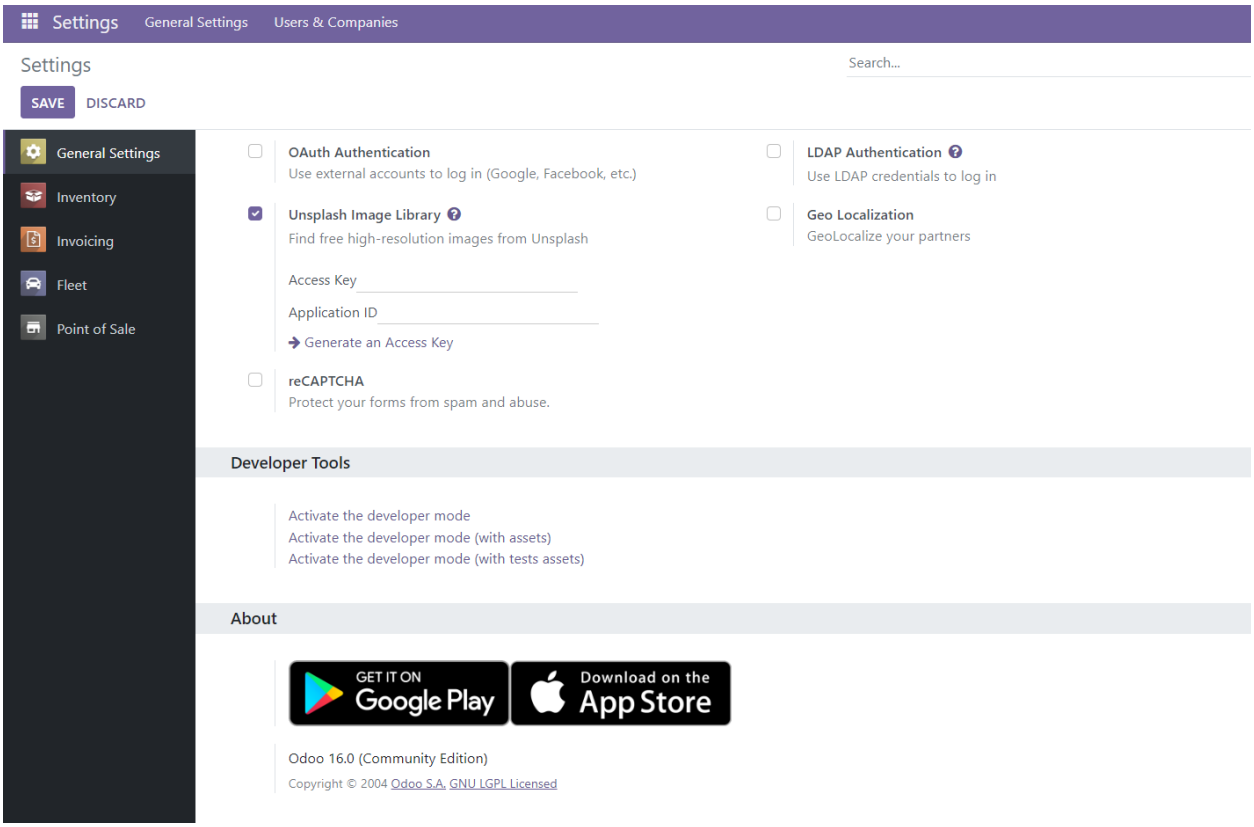
2. Features

- 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.

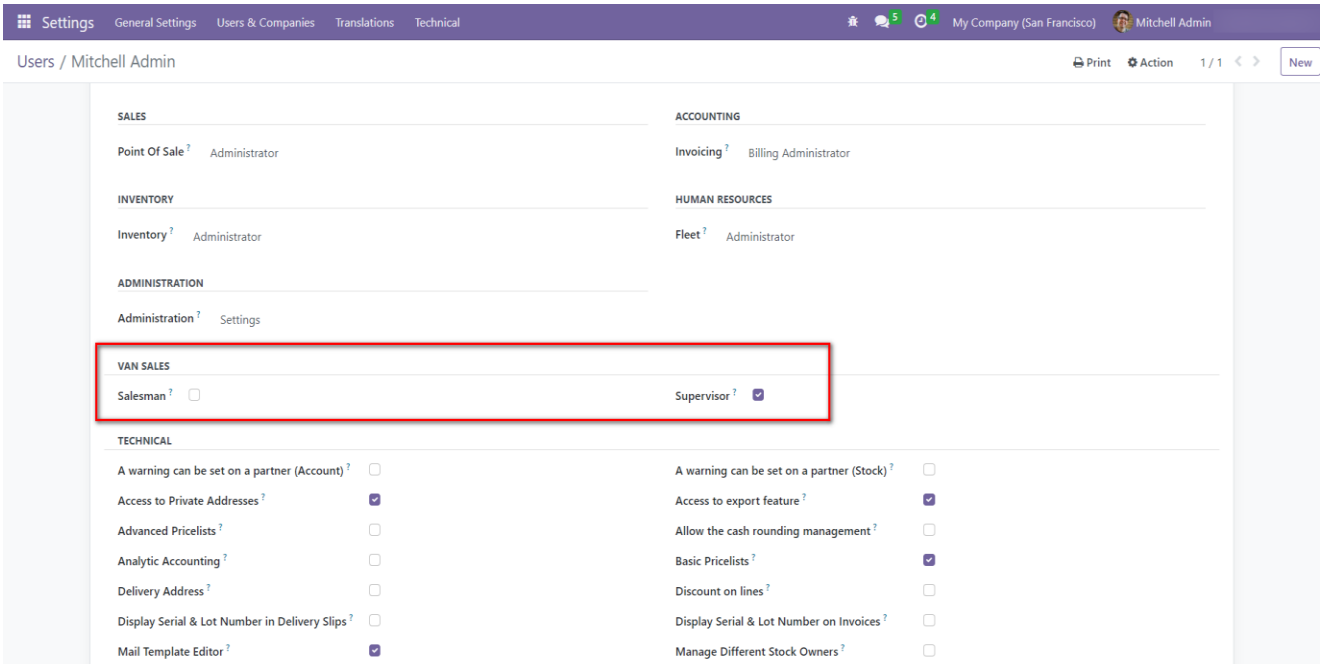
3. Screenshots

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

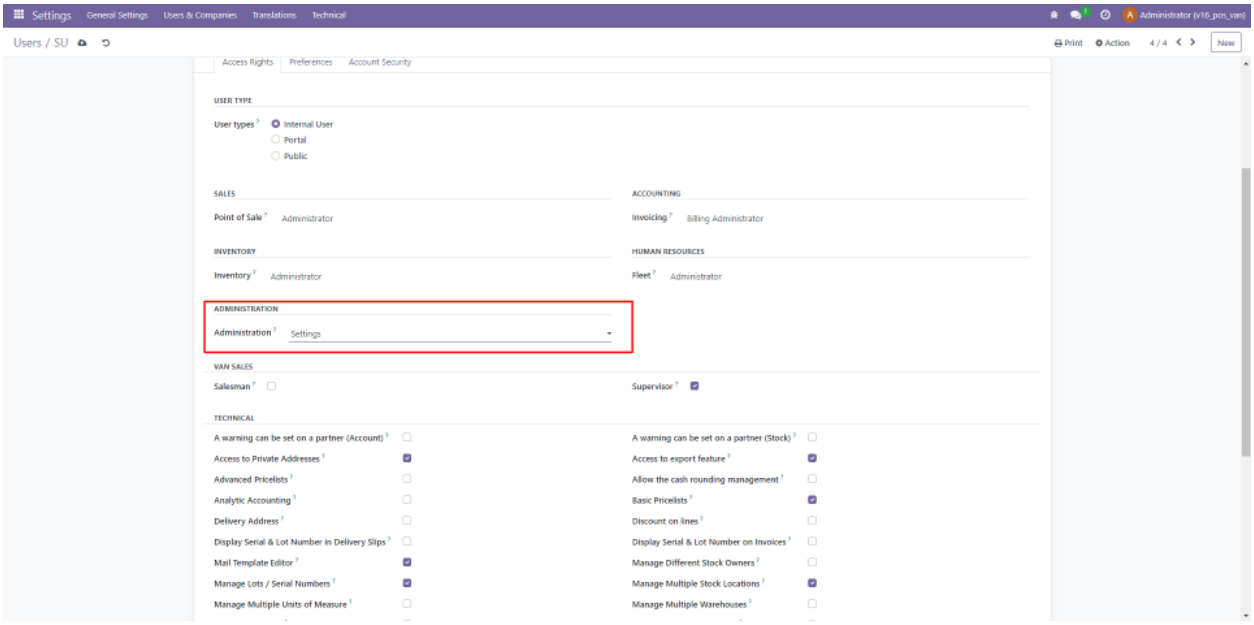
- Go to *Settings*.
- Enable developer mode by clicking on the 'Activate the developer mode'.



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

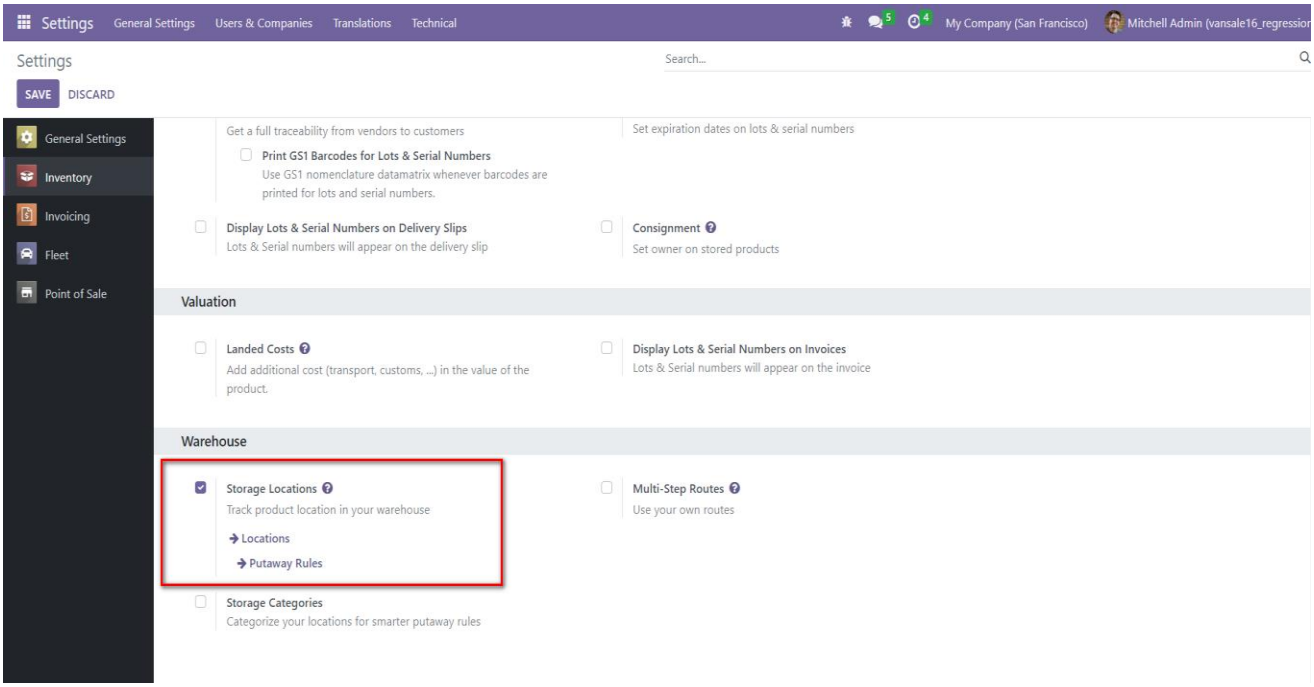


- If you want to give supervisor as administration access.



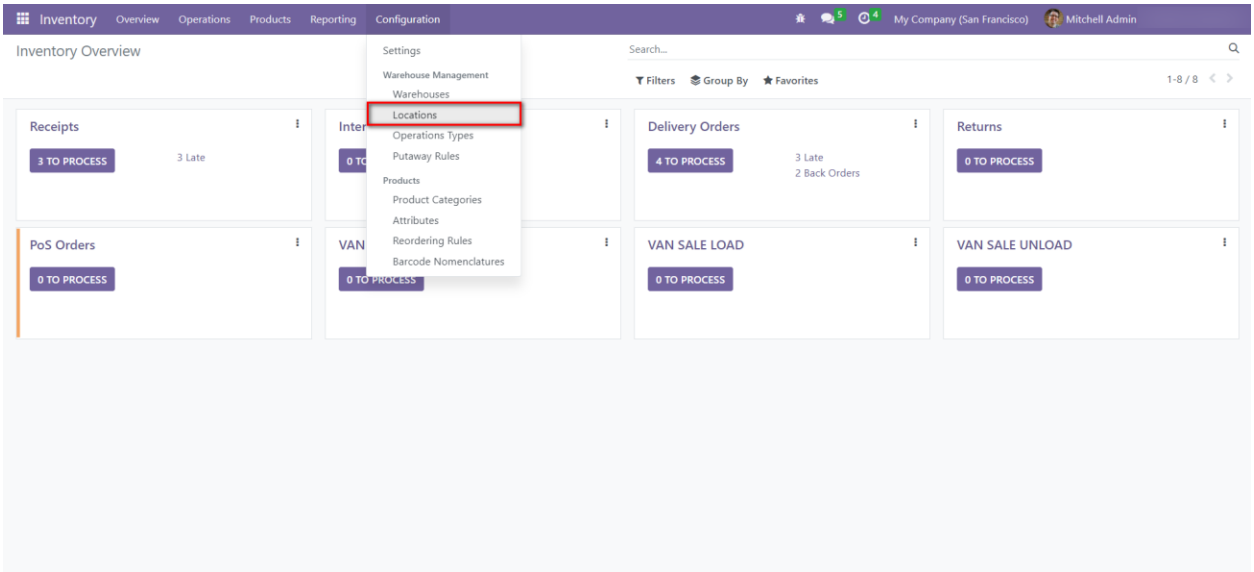
Screenshot 2: Van point of sale - Enable Storage locations:

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

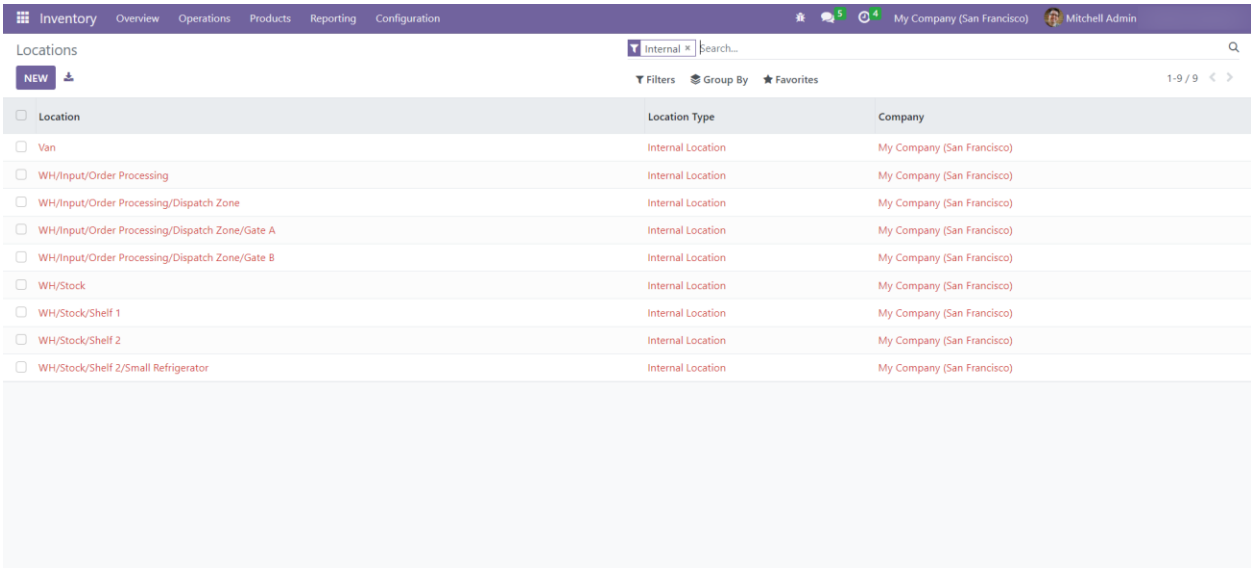


Screenshot 3: Van point of sale – Locations menu item:

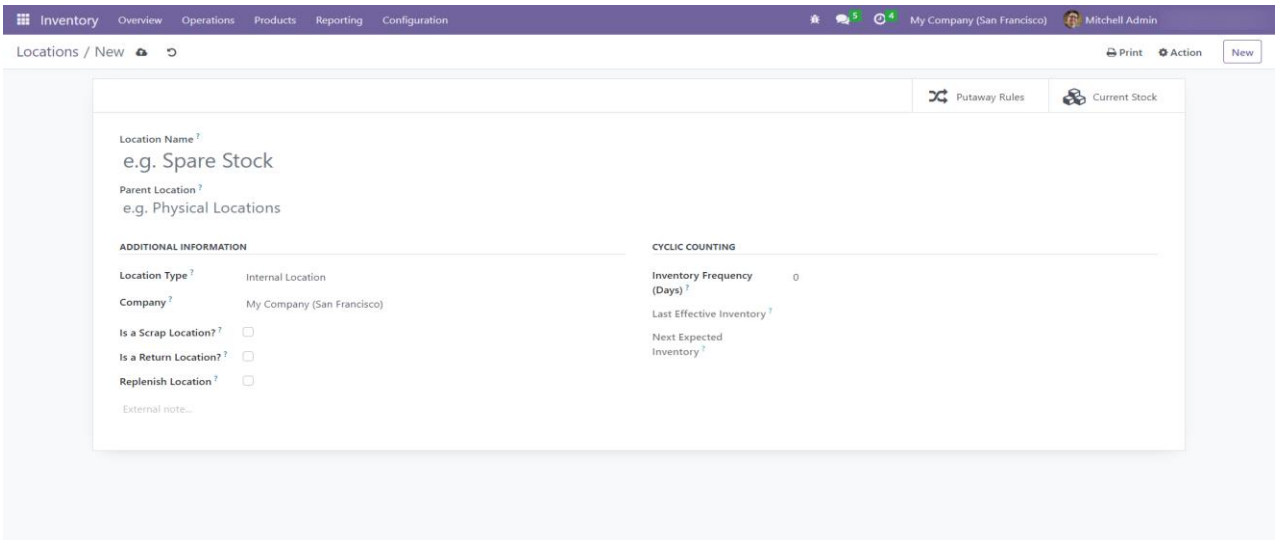
- Go to *Inventory*.
- Navigate to *Configuration -> Locations*.



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

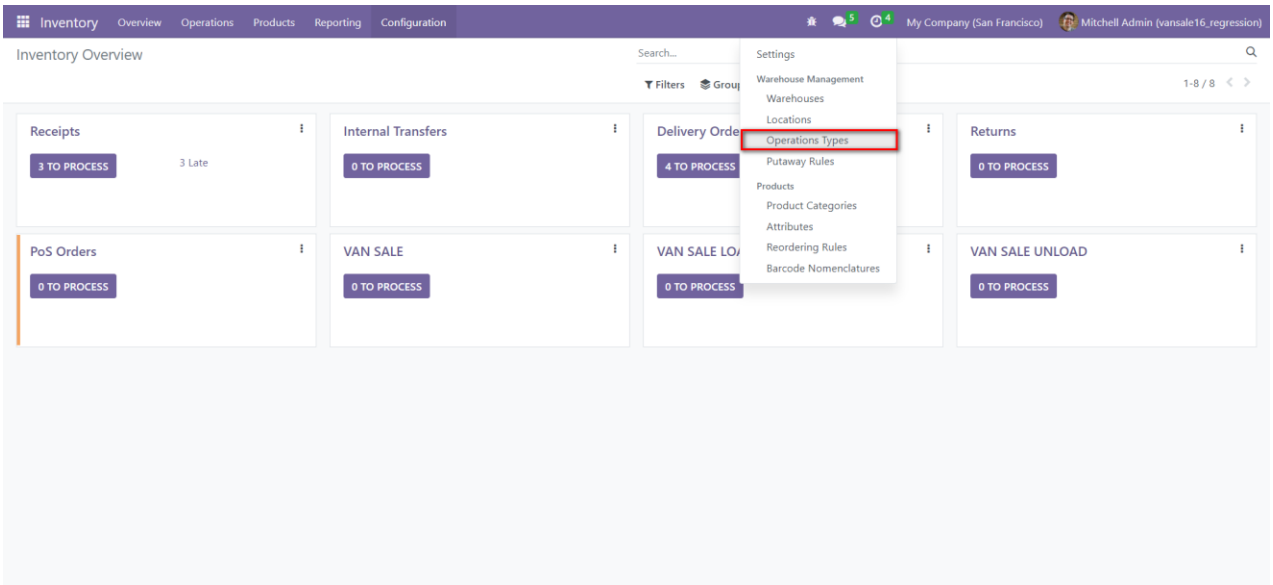


Screenshot 5: Van point of sale – Adding a new location:



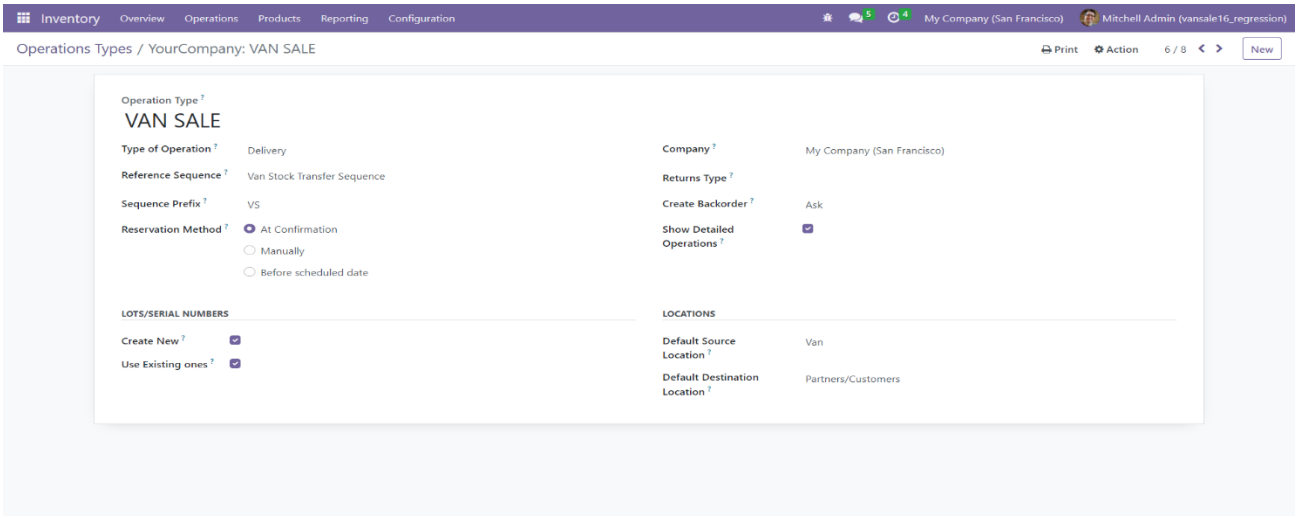
Screenshot 6: Van point of sale - operation types:

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



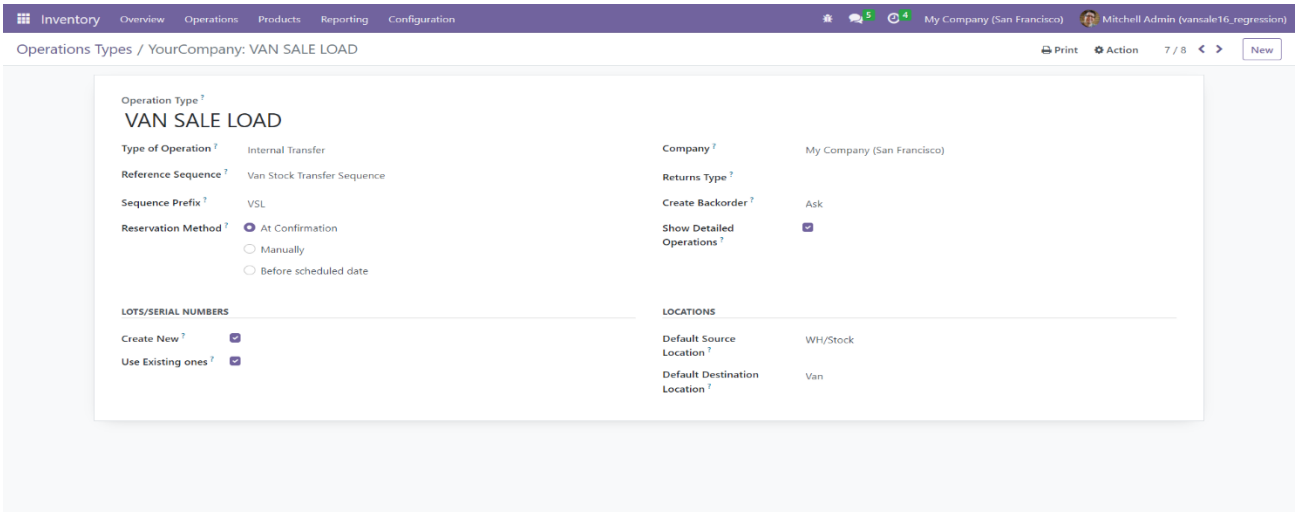
Screenshot 7: Van point of sale operation type - VAN_SALE:

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



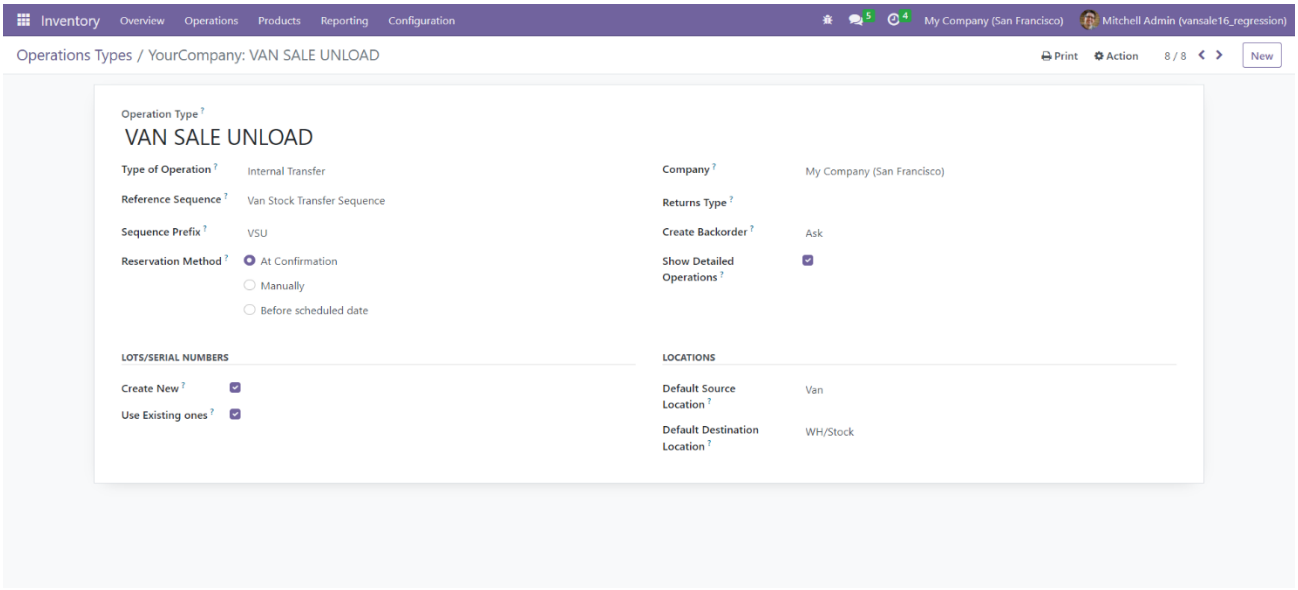
Screenshot 8: Van point of sale operation type - VAN_SALE_LOAD:

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



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

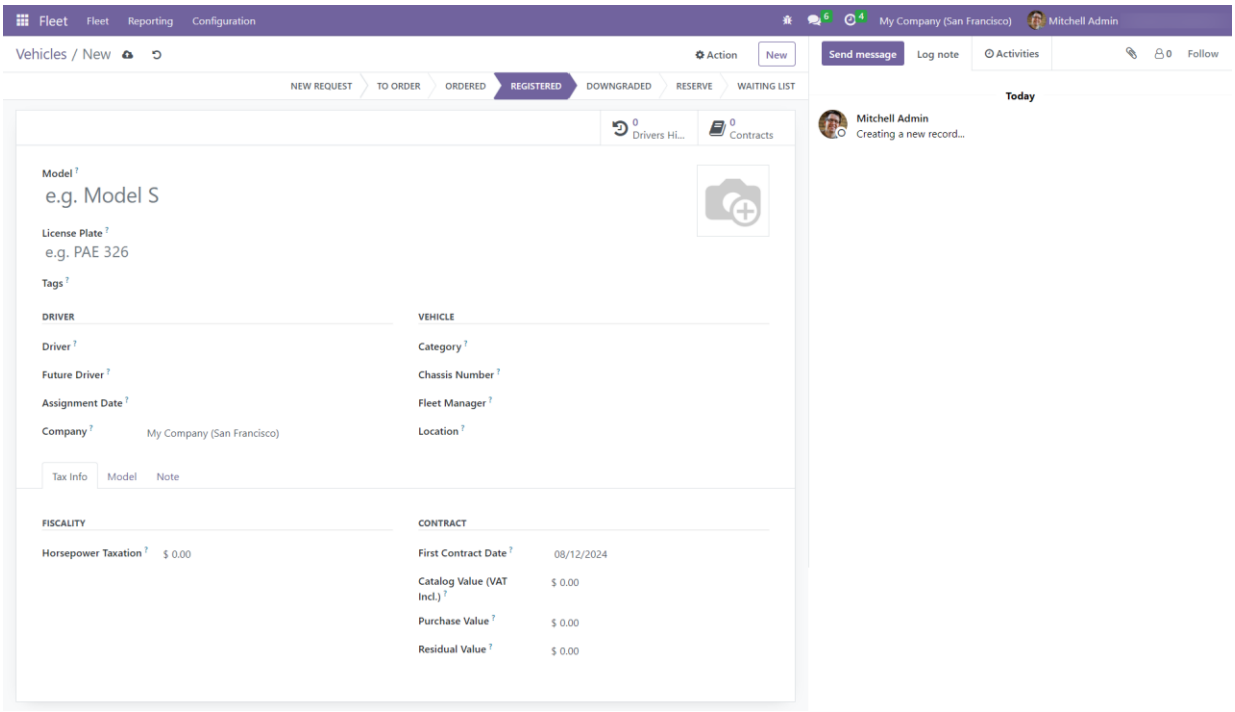
- This operation type is for stock move of unsold products from VAN to Warehouse locations after sales.



Screenshot 10: Create a Van in Fleet management:

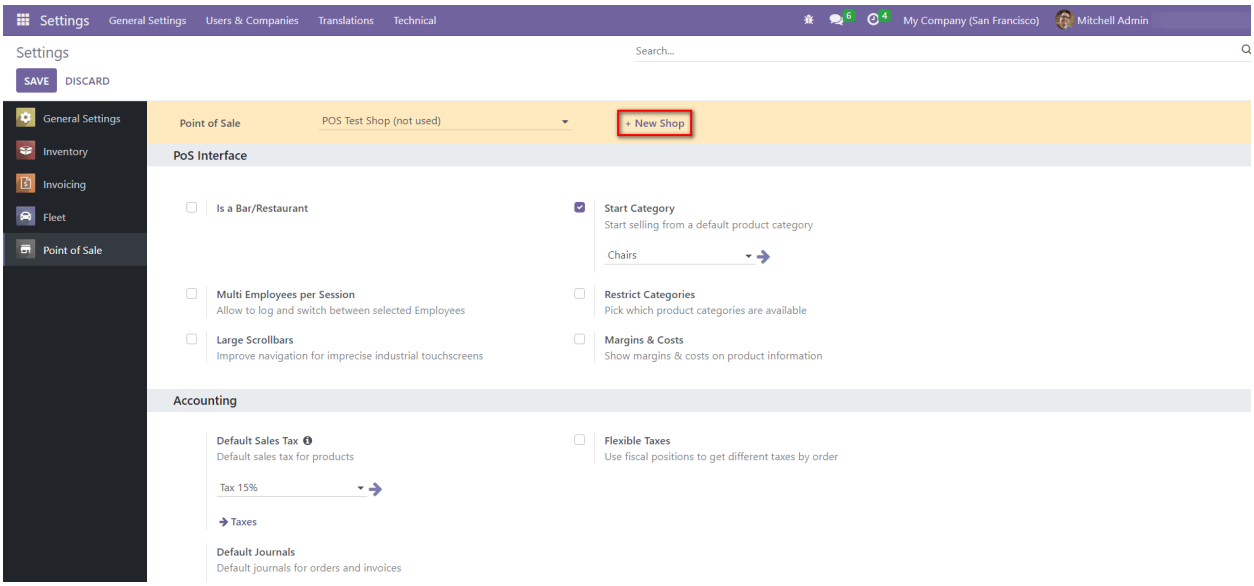
- Go to *Fleet management* module.
- Click *New*.
- Enter *Driver, Fleet manager and other van details* -> Save.

Fleet manager is considered as the Salesman for the Van.

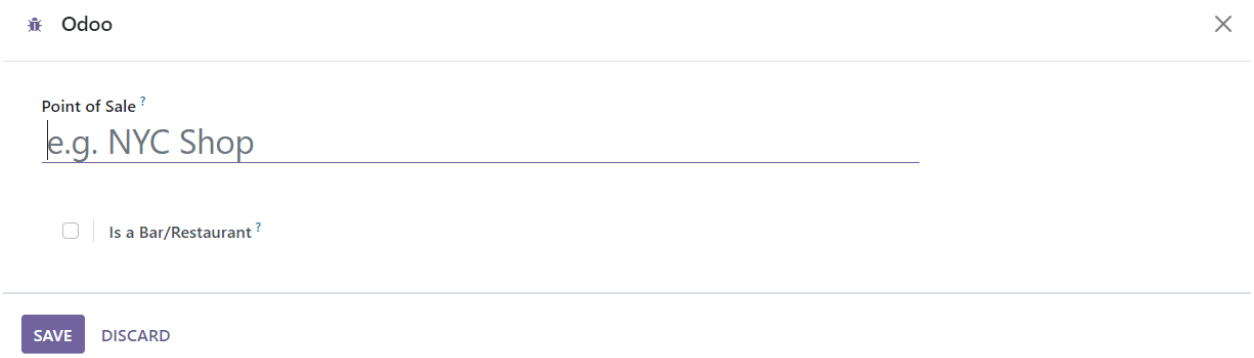


Screenshot 11: Create a new Point of Sale:

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

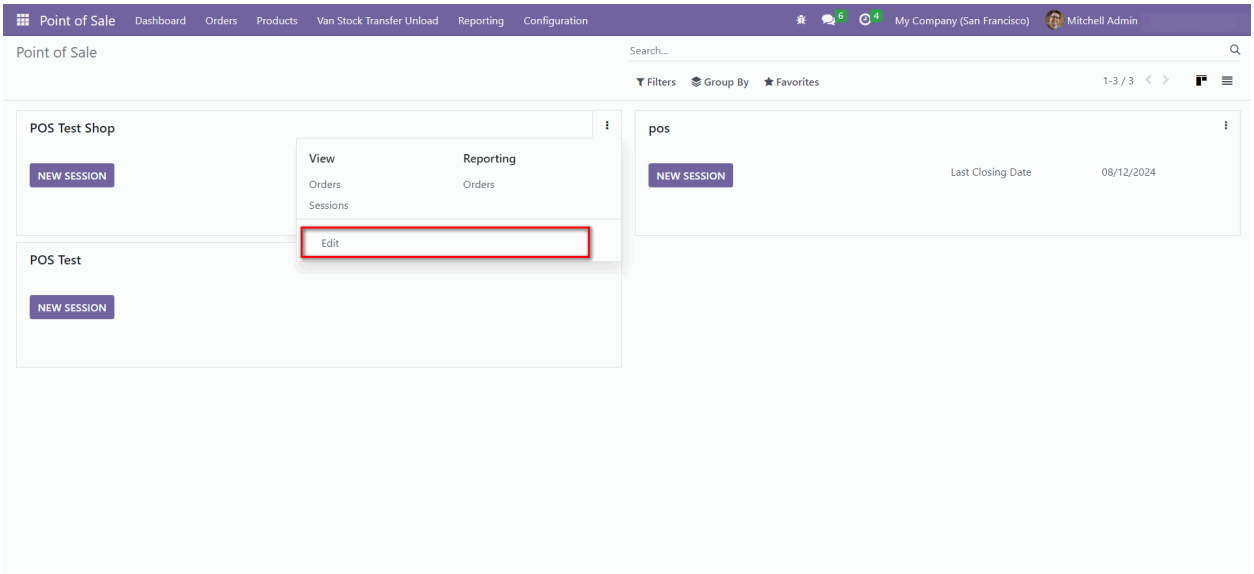


Screenshot 12: Enter new POS details:



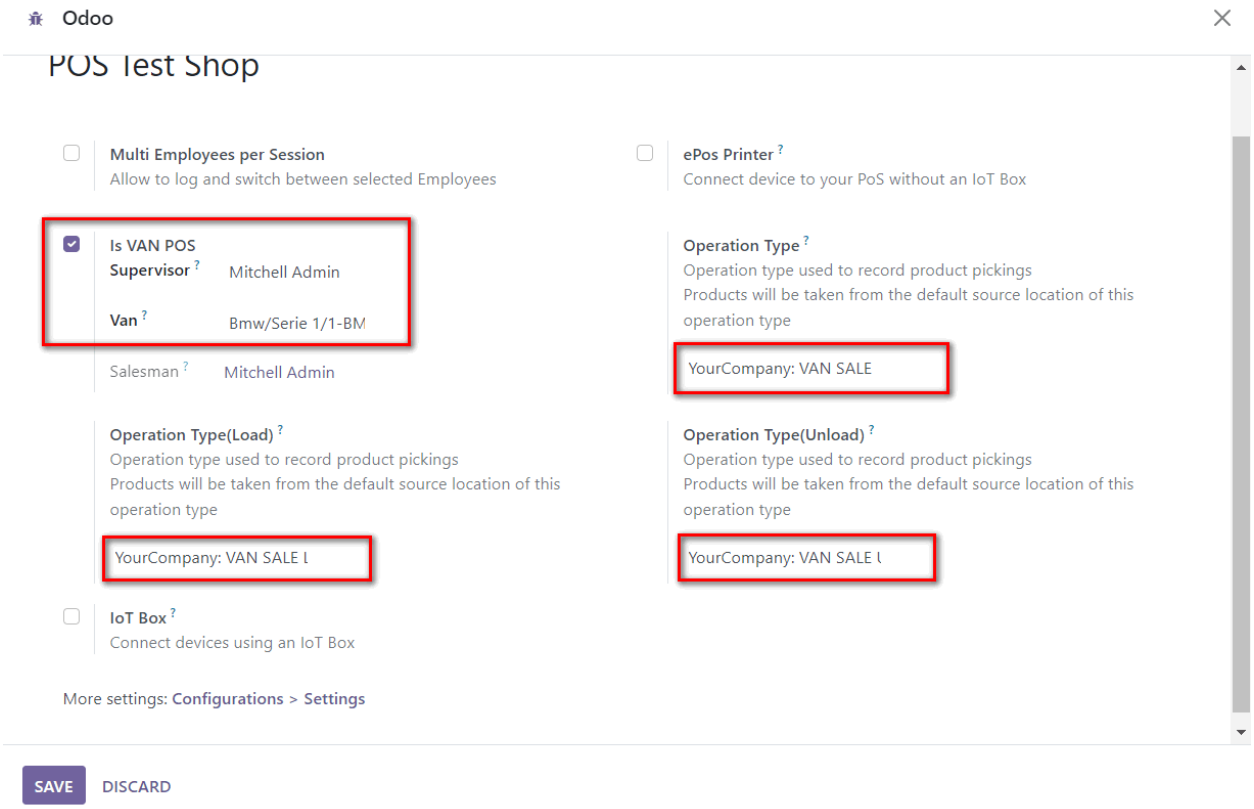
Screenshot 13: Edit new POS:

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



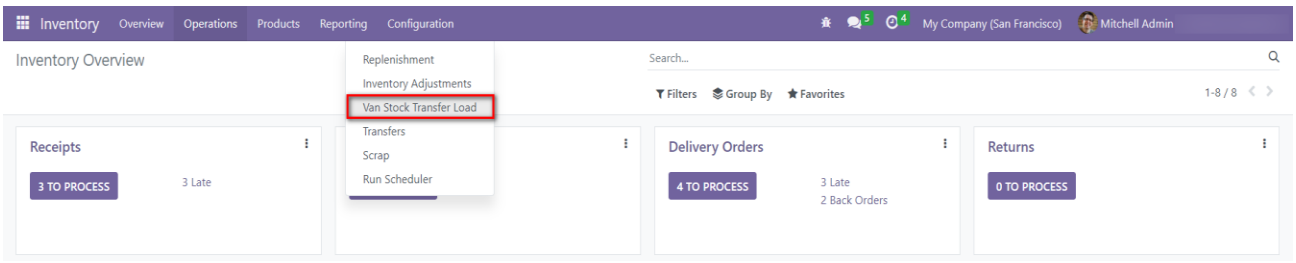
Screenshot 14: Configure new POS to Van Sale POS:

- 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
ePos Printer
Connect device to your PoS without an IoT Box
Is VAN POS
Supervisor
Mitchell Admin
Van
Bmw/Serie 1/1-BM
Salesman
Mitchell Admin
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(Load)
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
IoT Box
Connect devices using an IoT Box
More settings: Configurations > Settings
SAVE
DISCARD

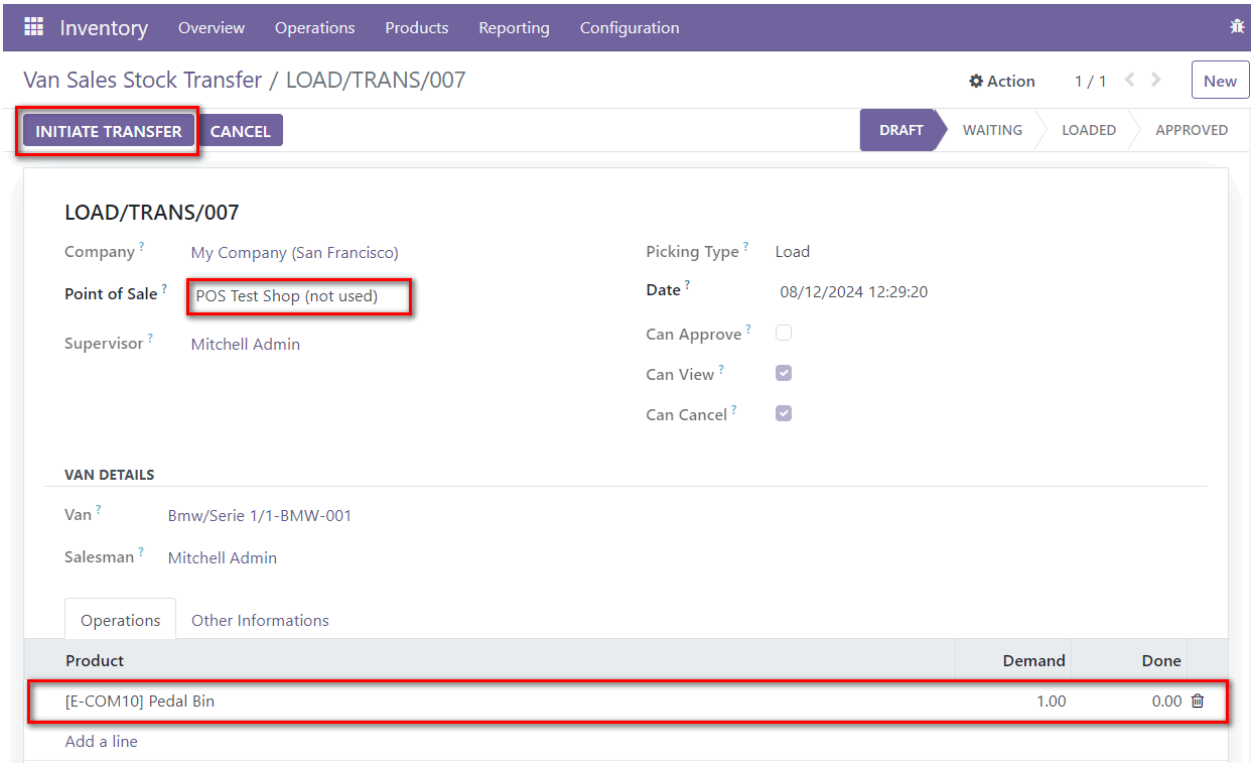
Screenshot 15: Van point of sale - Van Stock Transfer Load:

- 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.



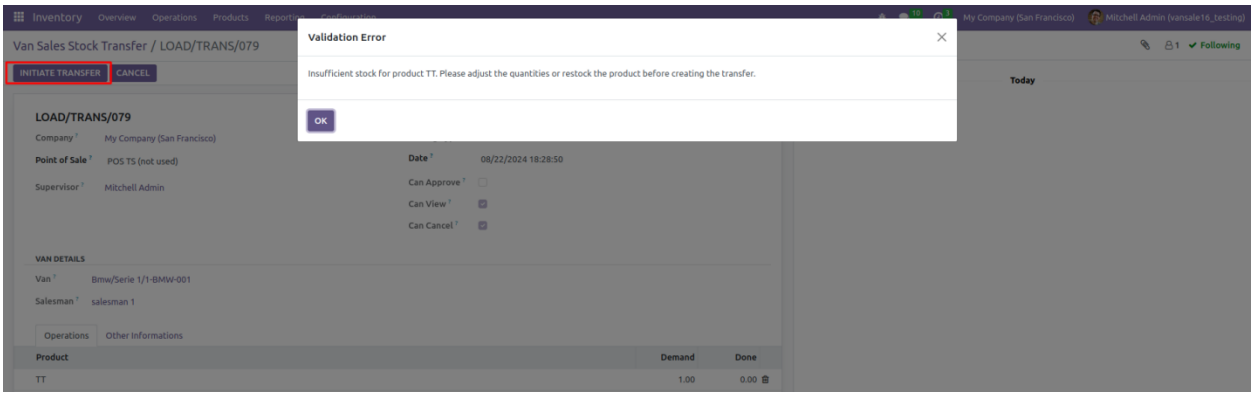
Screenshot 16: Van point of sale – Create Van Stock Transfer Load:

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

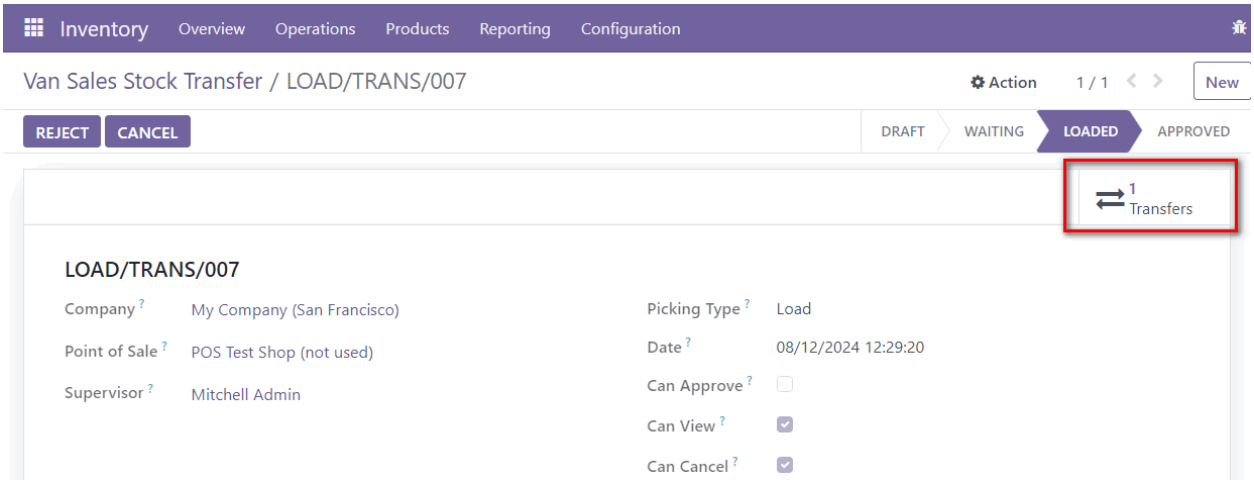


Screenshot 17: When we do not have enough stock for the Product it will not let us initiate the transfer, it will raise validation.

- *While initiating the transfer.*

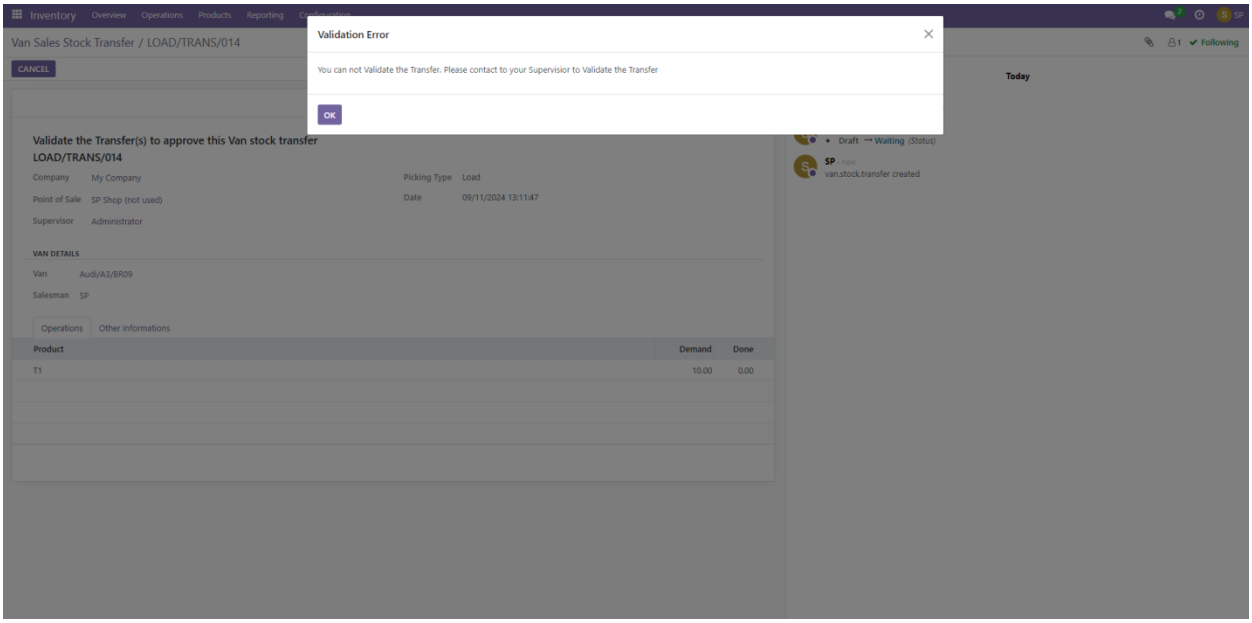


Screenshot 18: Van point of sale – View the created transfer if we have enough stock then transfer will be initiated:

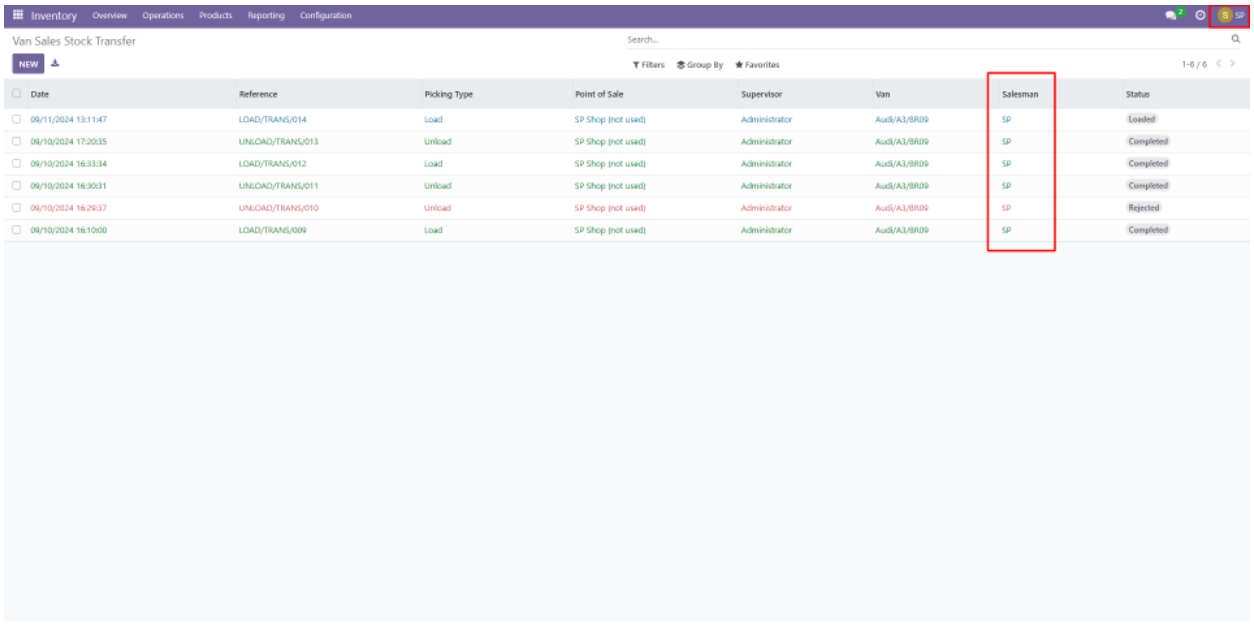


Screenshot 19: Van point of sale – logged in as a salesman.

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

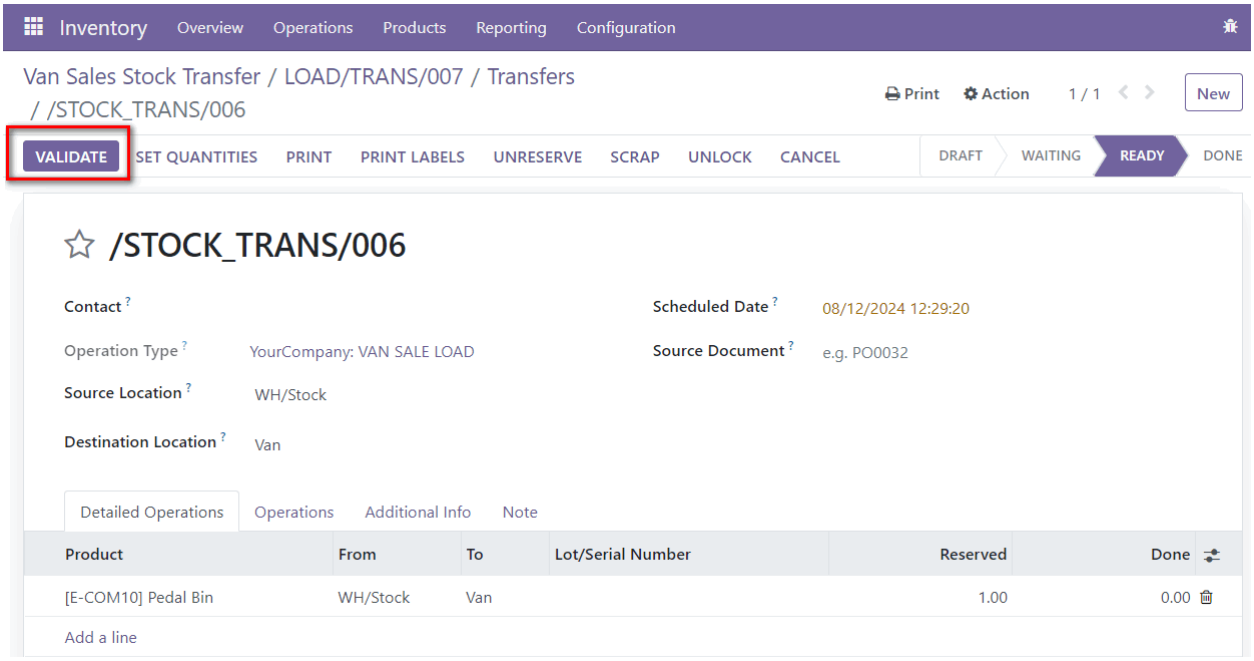


- *Each salesman can see only his/her Records.*



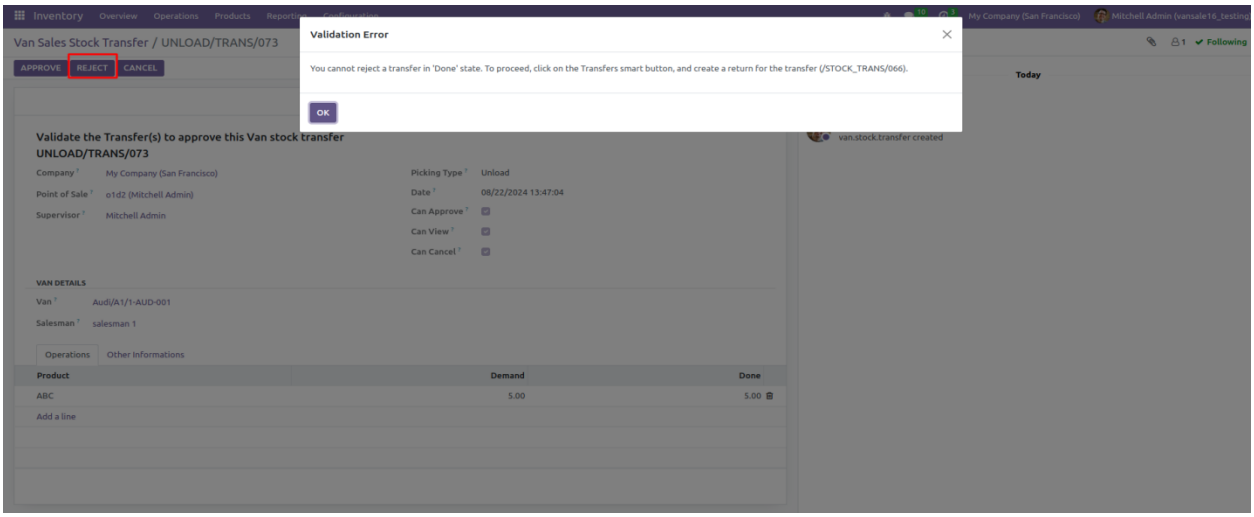
Screenshot 20: Van point of sale – Validate transfer:

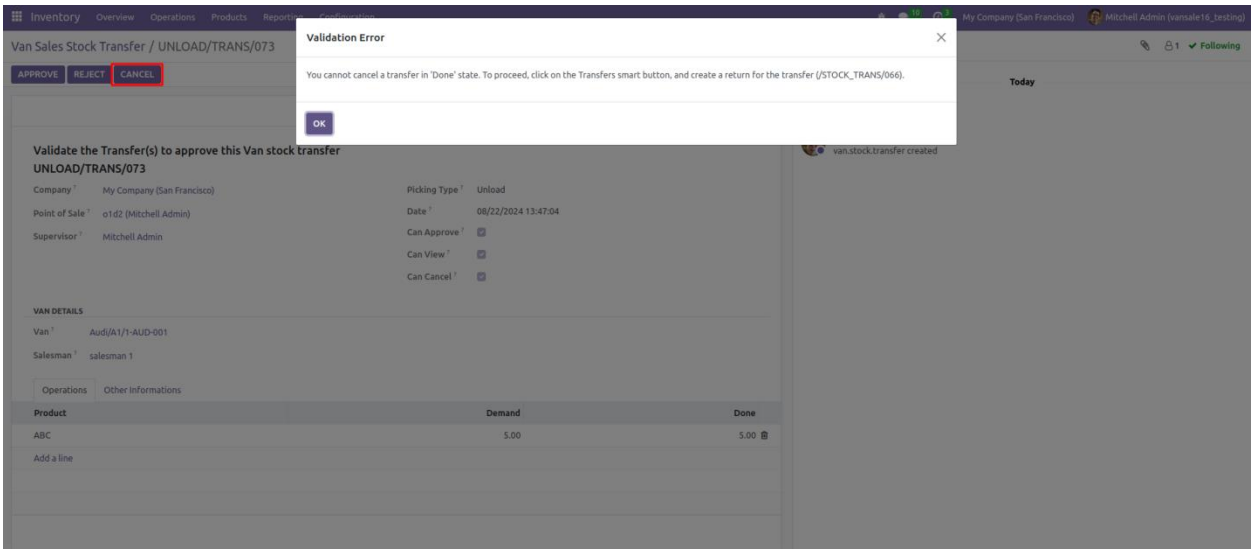
- *Only Supervisor can validate the transfer.*



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.

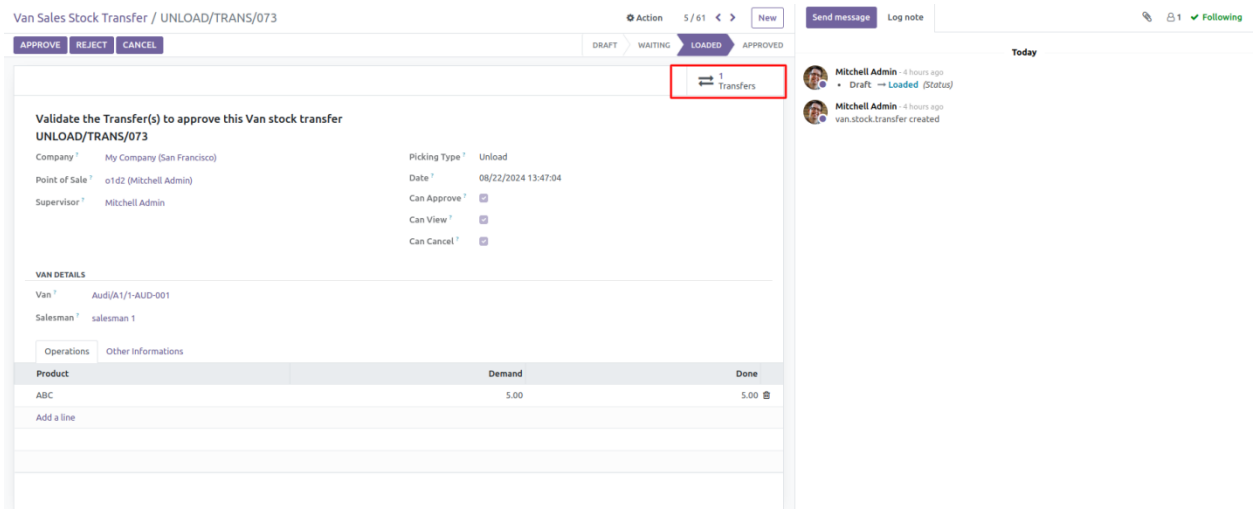
- Go back *to Load Transfer* record.
- Click on *Reject* and *Cancel*.





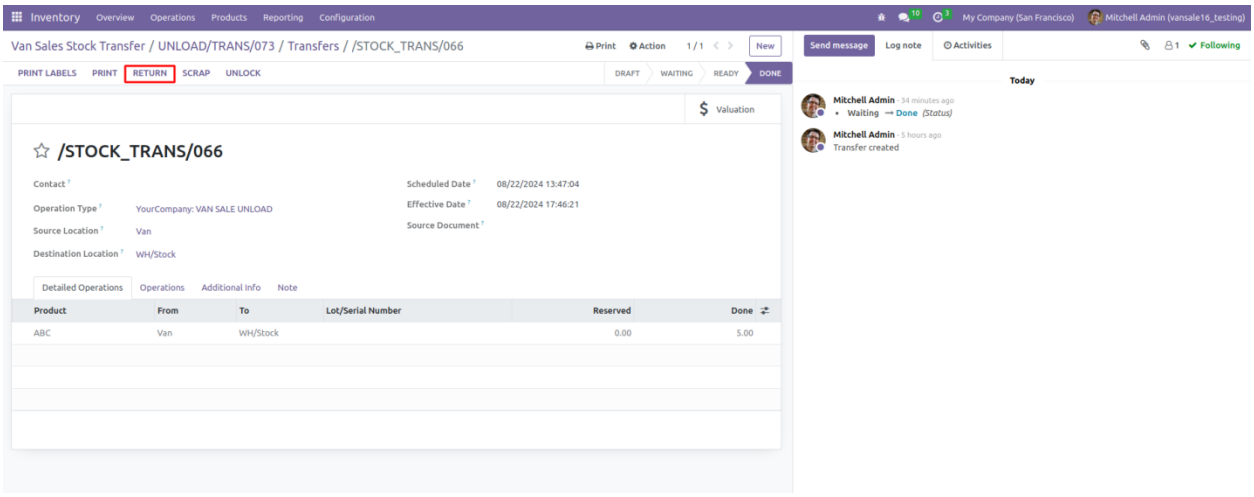
Screenshot 22: In case of Reject and Cancel getting stock back to Warehouse – Create Return.

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



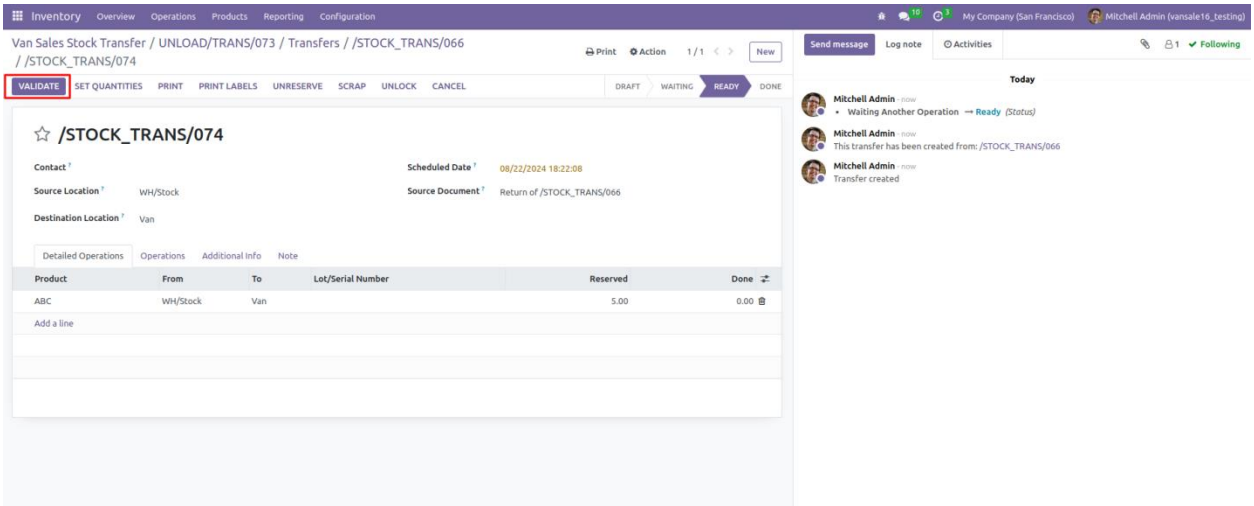
Screenshot 23: Create Return:

- *Click on return button.*



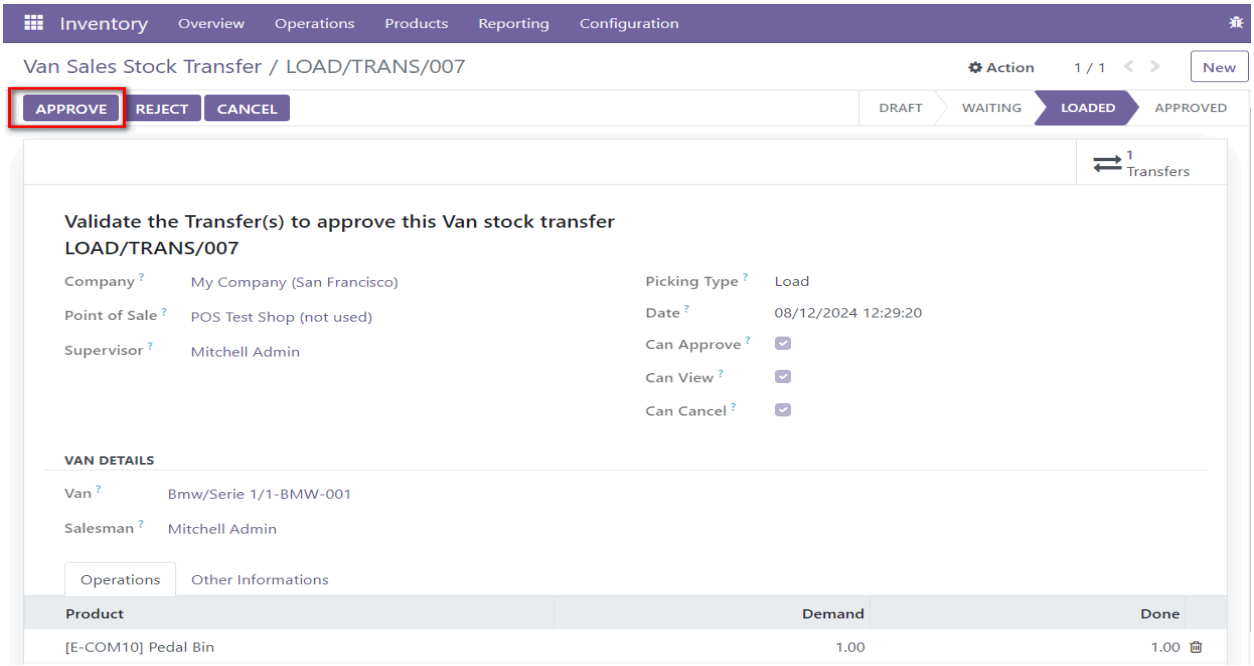
Screenshot 24: Validate the Return:

- Stock will be moved to warehouse.

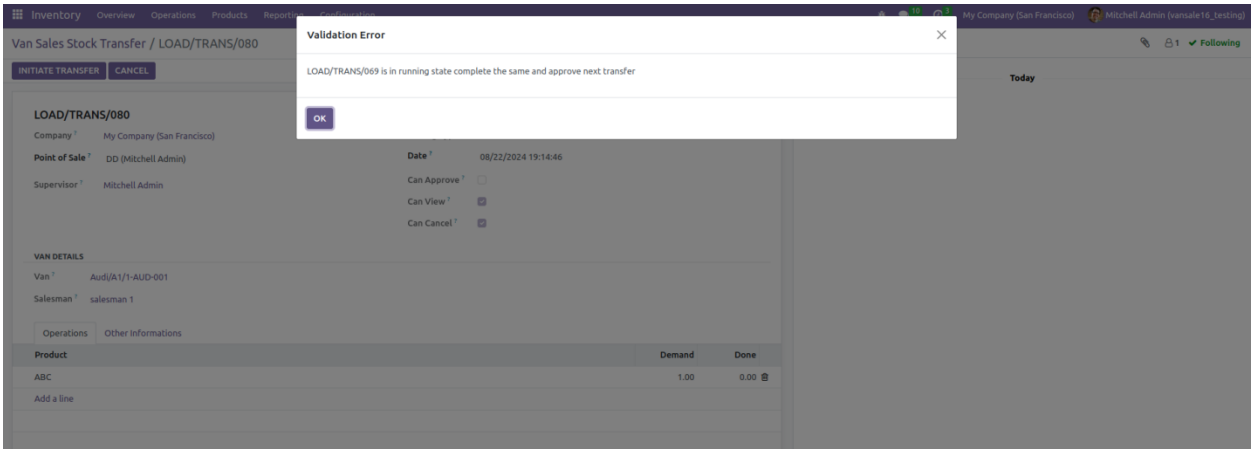


Screenshot 25: Van point of sale – Load Transfer Approval:

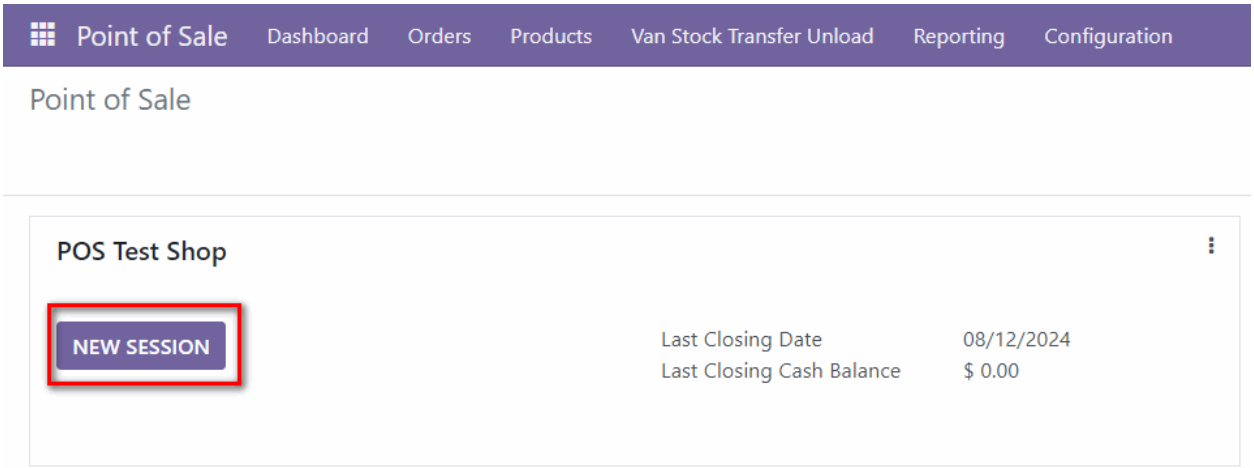
- Go back to *Load Transfer* record.
- Only Supervisor can approve the *Load Transfer*.
- Click *Approve*.



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.

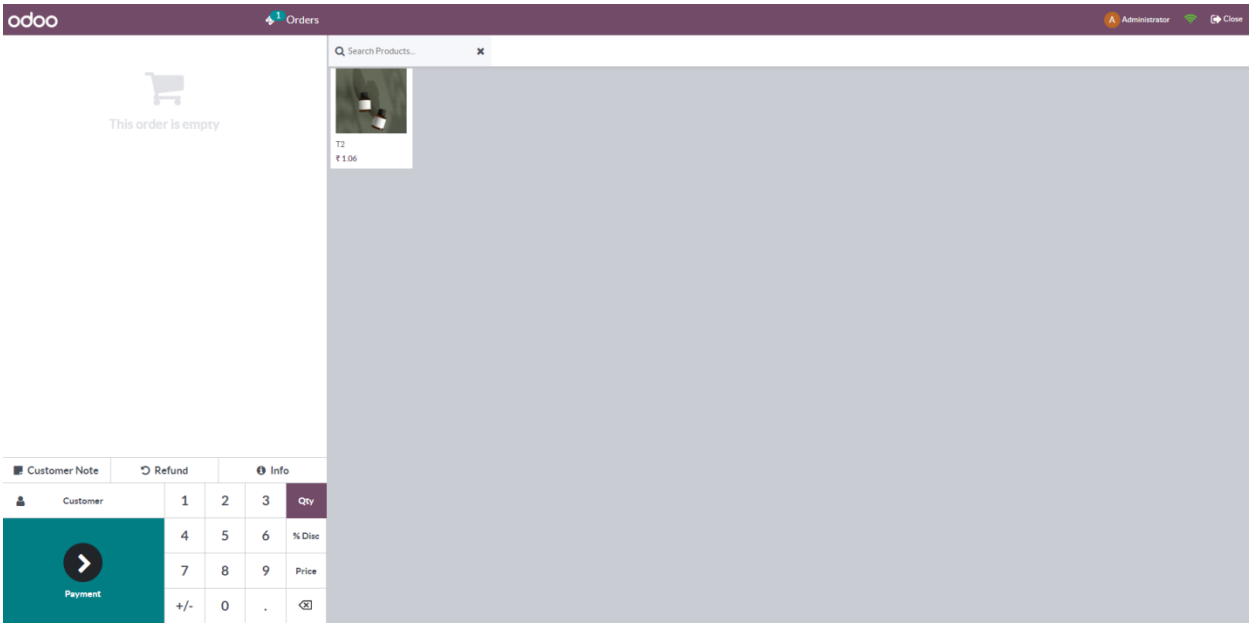


Screenshot 27: Van point of sale – Open new POS session:



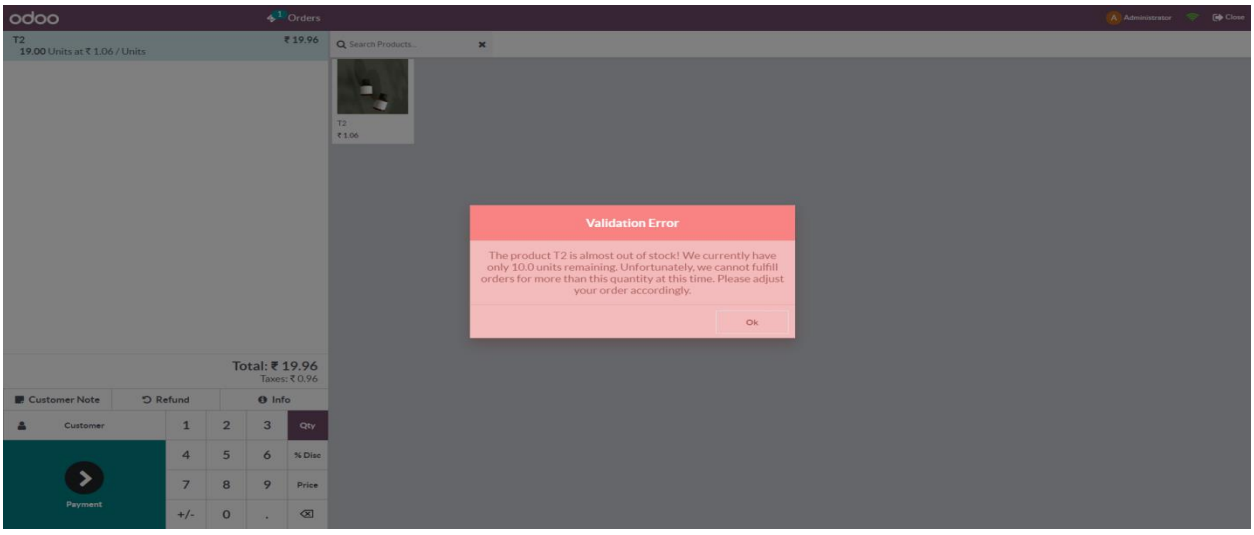
Screenshot 28: Van point of sale Sell the loaded products:

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



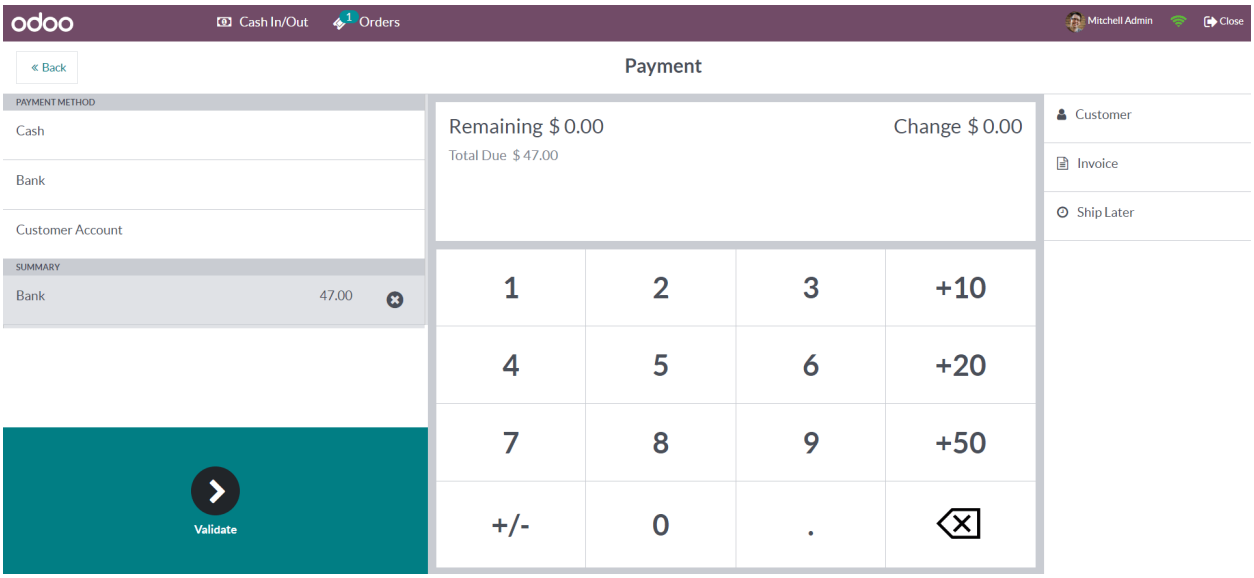
Screenshot 29: Van point of sale, Sell the loaded products

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



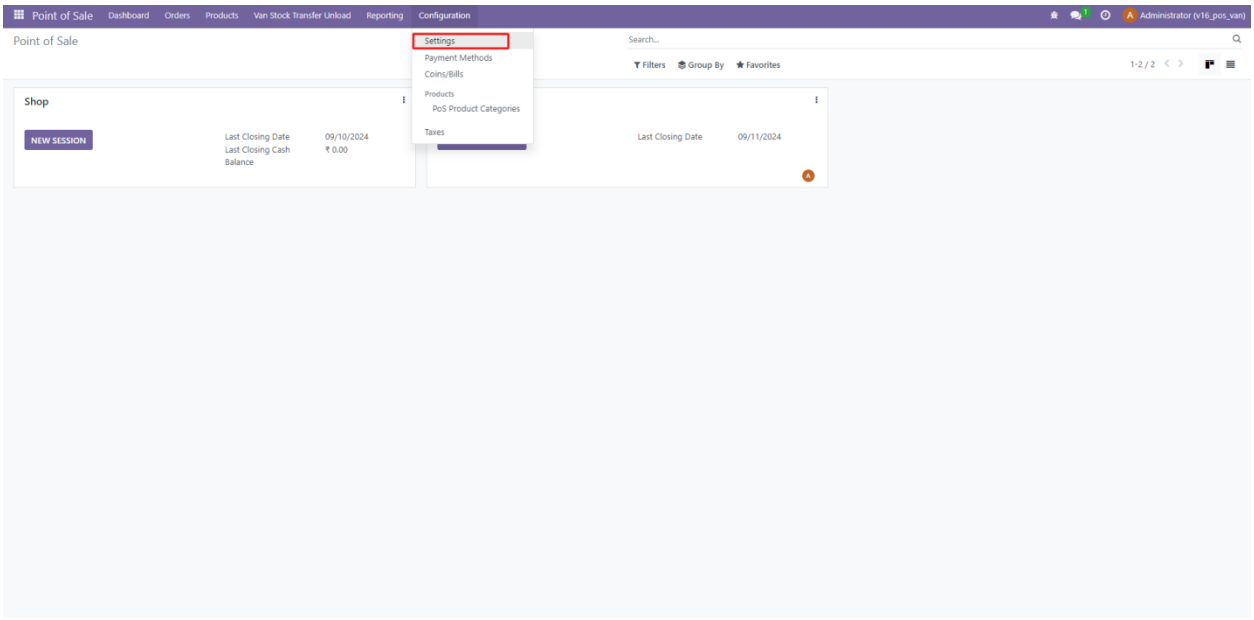
Screenshot 30: Van point of sale, Sell the loaded products:

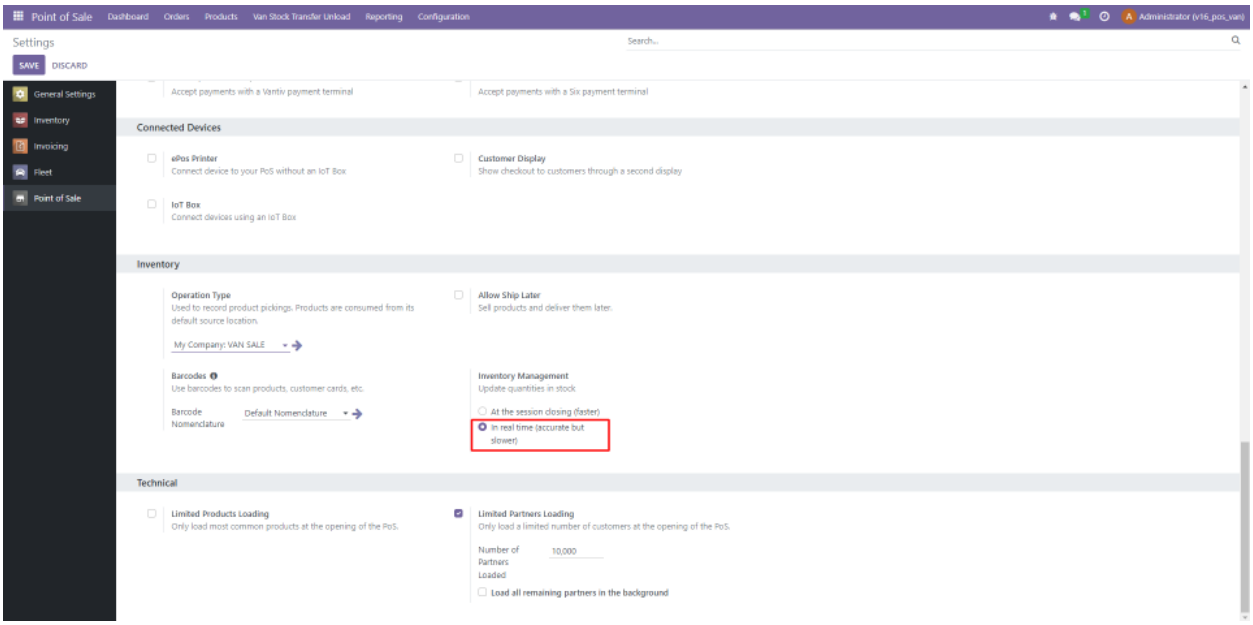
- Select any payment method – Bank/Cash.
- Validate payment.



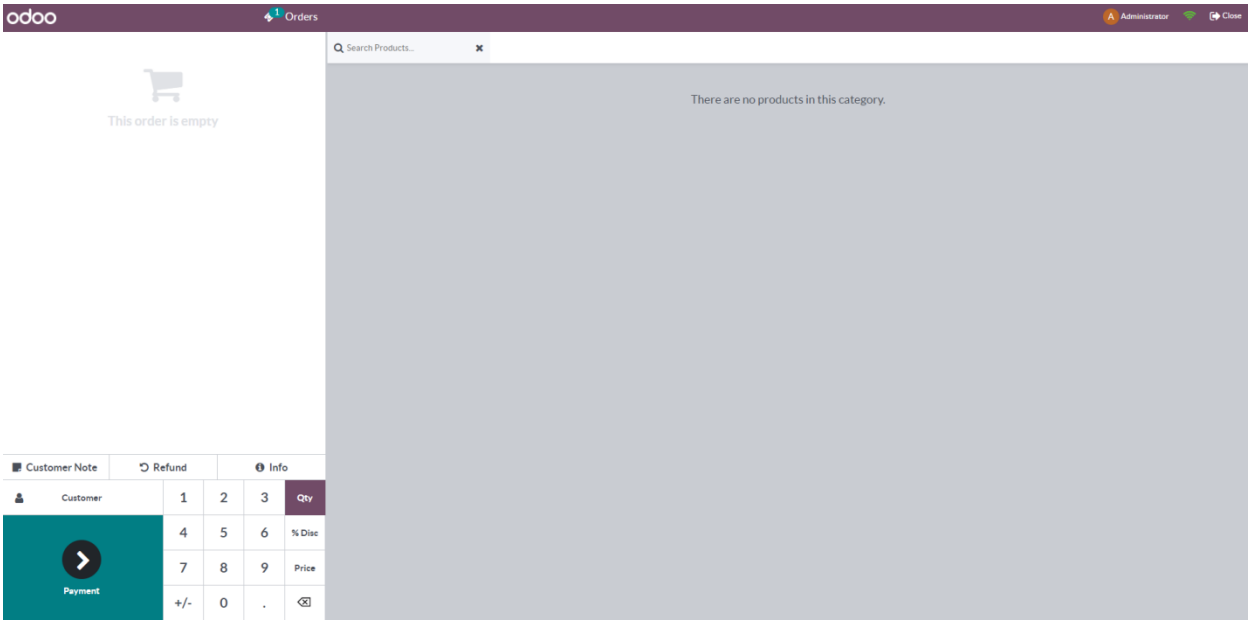
Screenshot 31: For real time stock update:

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

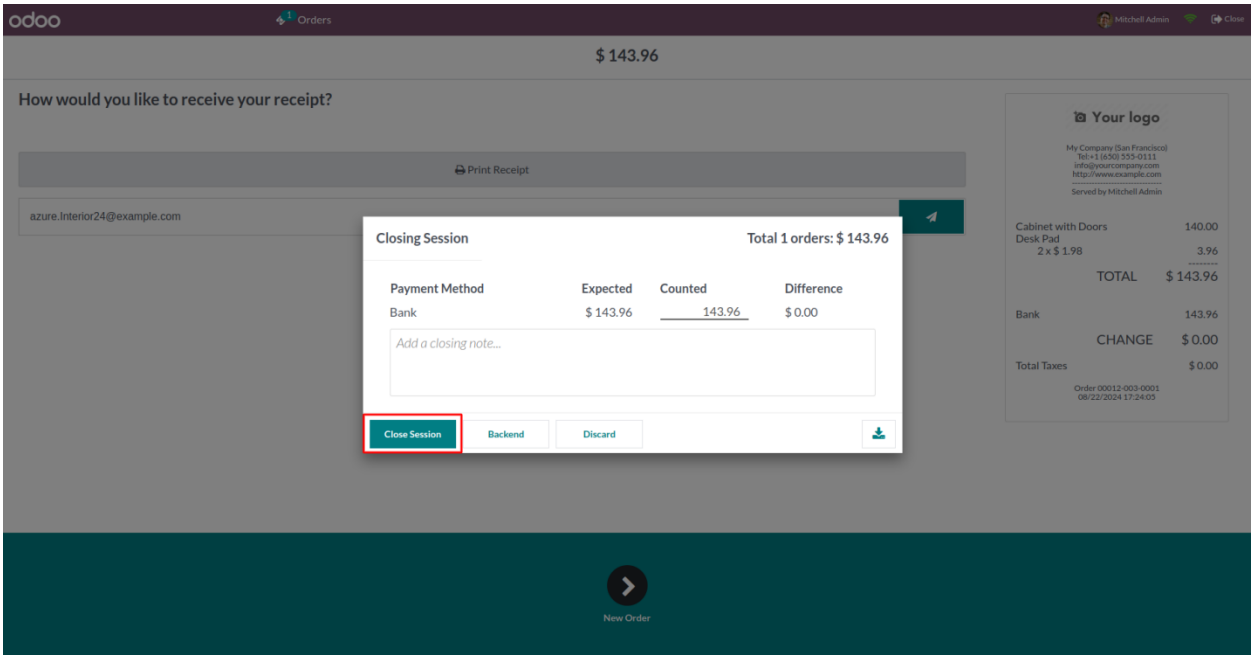




Screenshot 32: When all Loaded Products are Sold it will Updated stock in real time. if we go to product screen it will show Blanck because all the loaded items are sold.

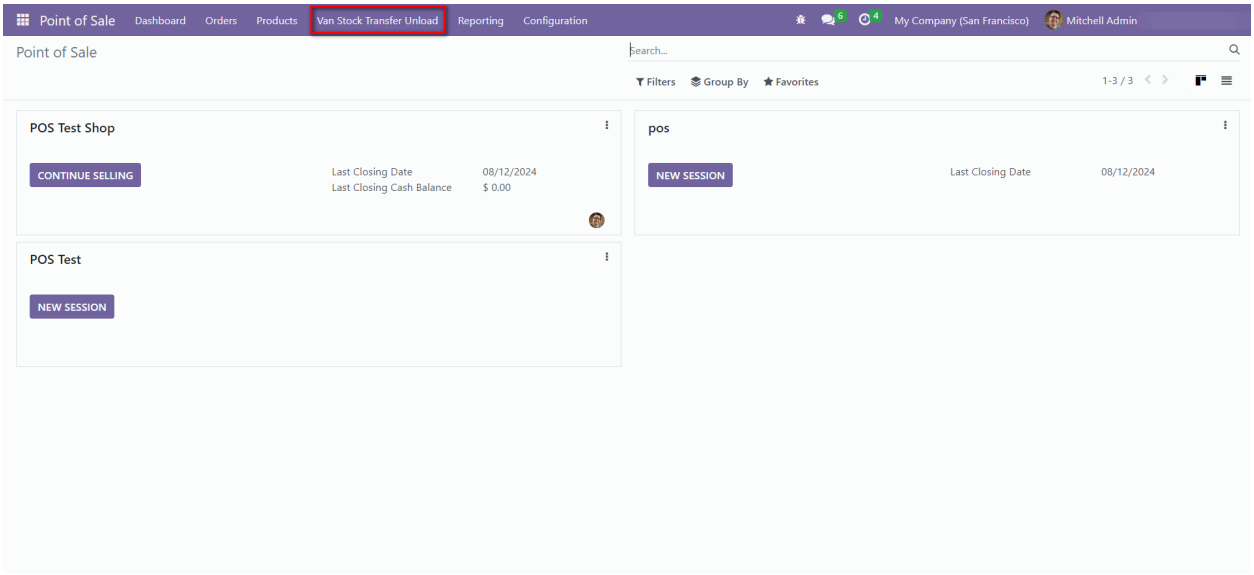


Screenshot 33: When all Loaded Products are Sold, in That case we do not have to create Unload, we can simply close the session. Stock will auto be updated.



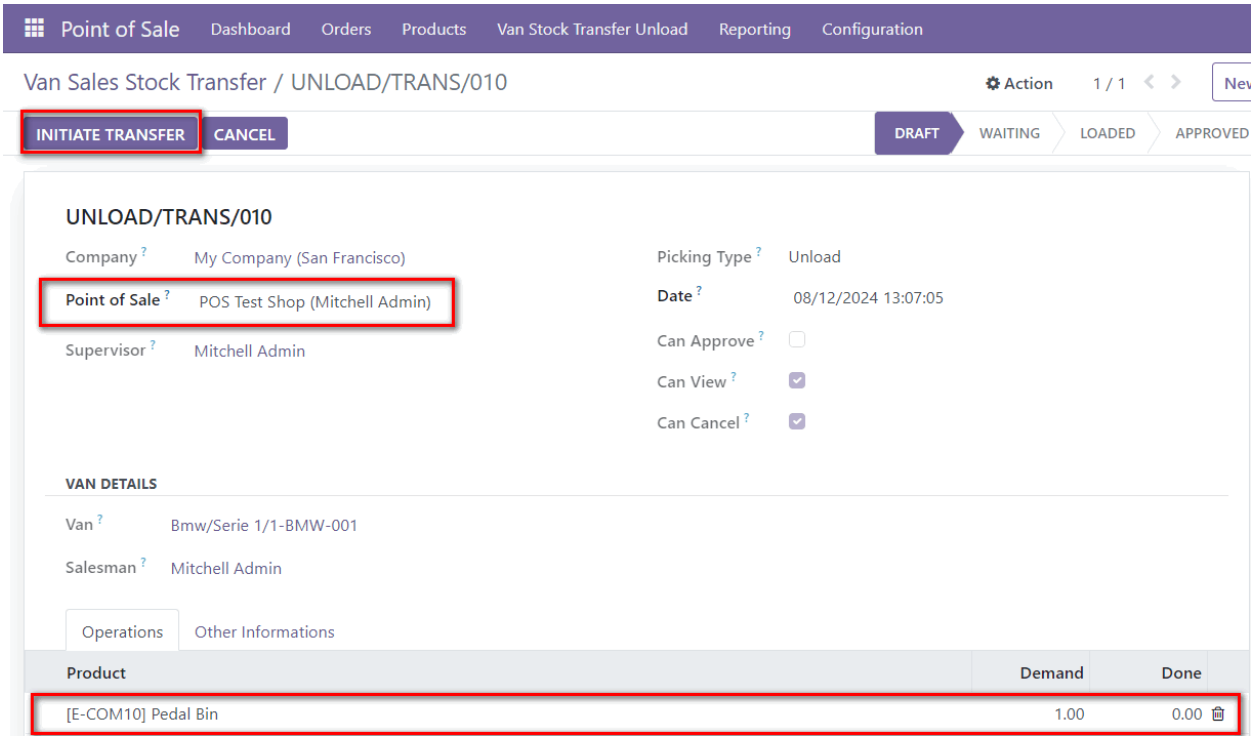
Screenshot 34: Van point of sale Unload transfer to move unsold products to warehouse:

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



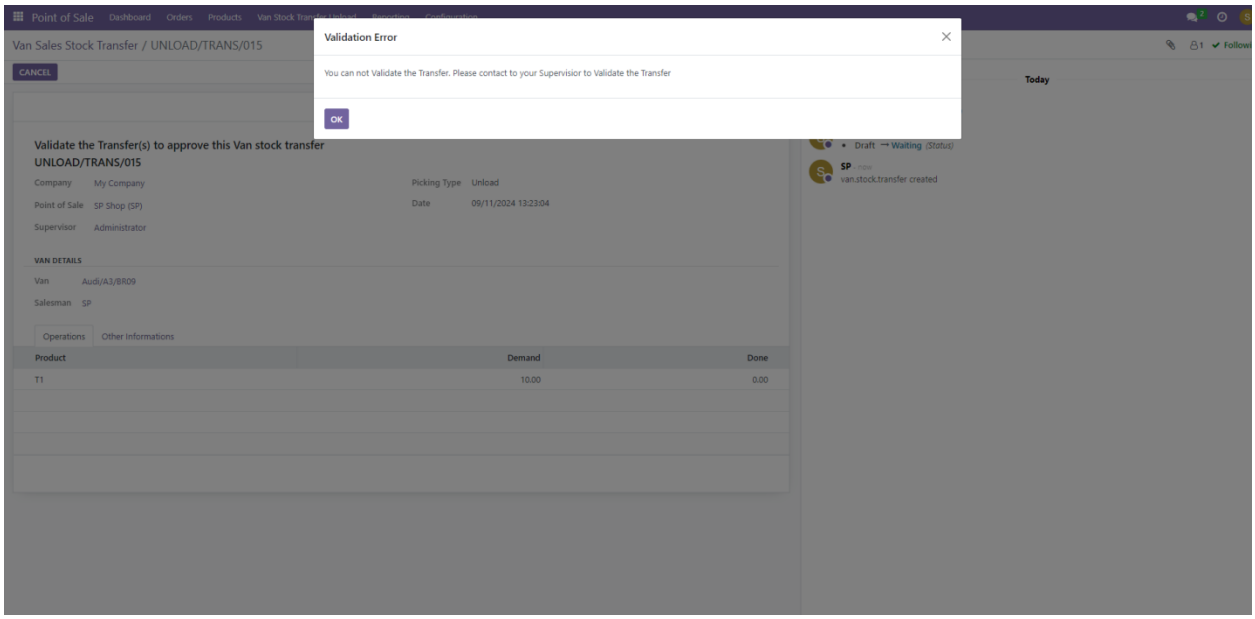
Screenshot 35: Van point of sale - Create an unload transfer:

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

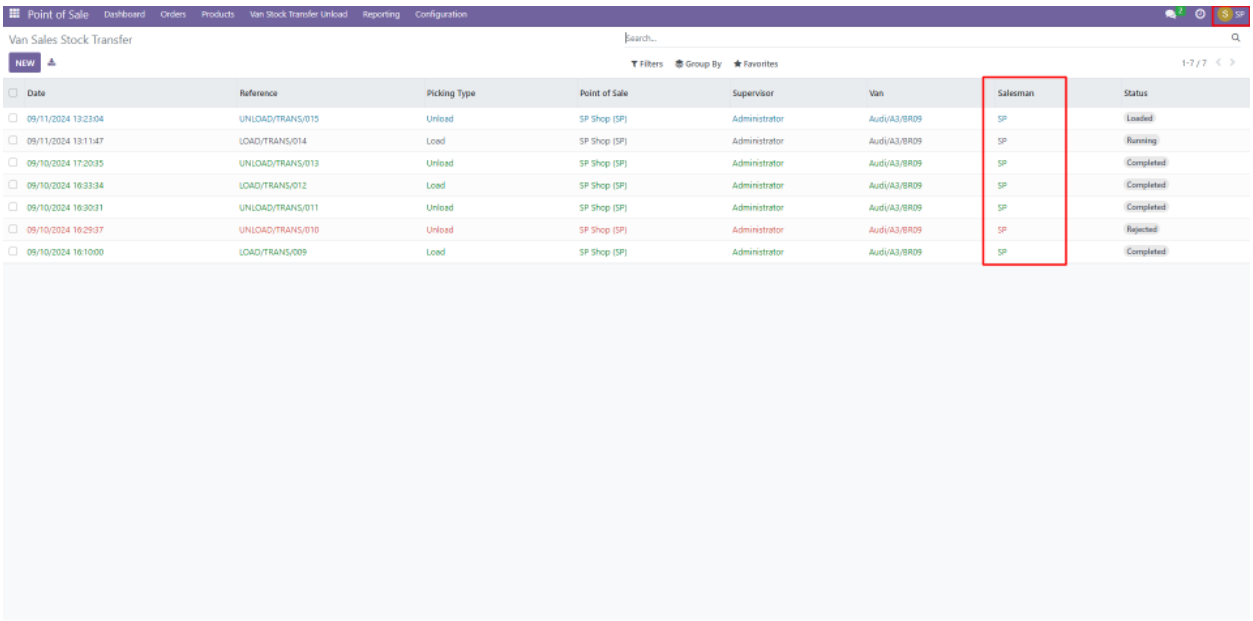


Screenshot 36: Van point of sale – If you logged in as salesman:

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

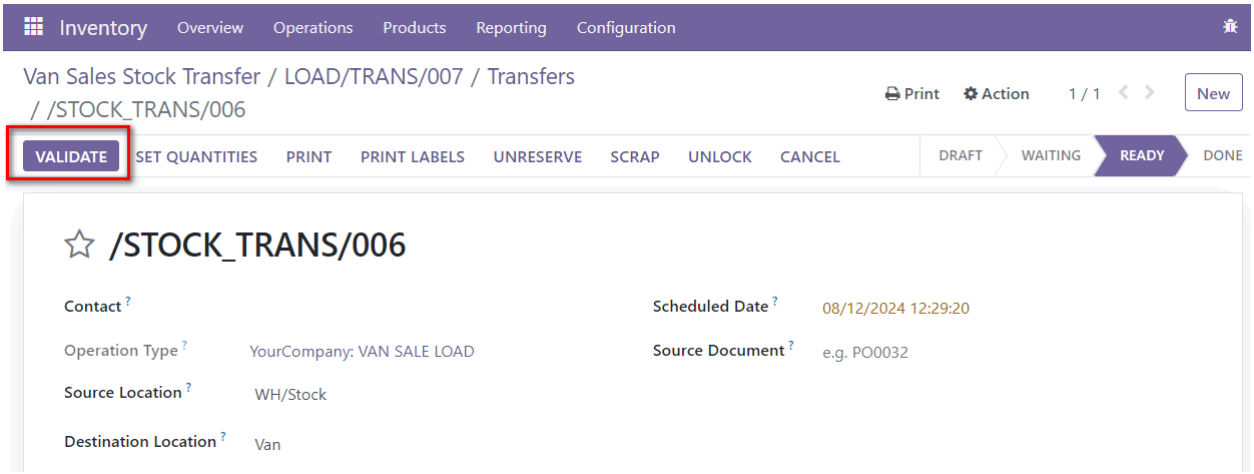


- *Each salesman can see only his/her unload Records.*



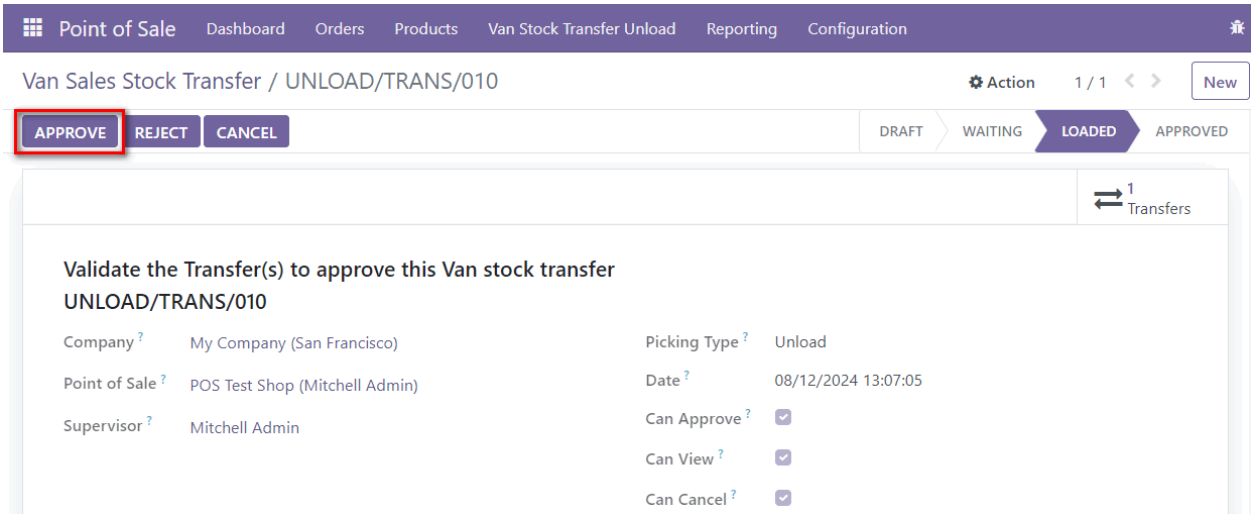
Screenshot 37: Van point of sale – Validate Product Transfer:

- *Only Supervisor can Validate the transfer.*



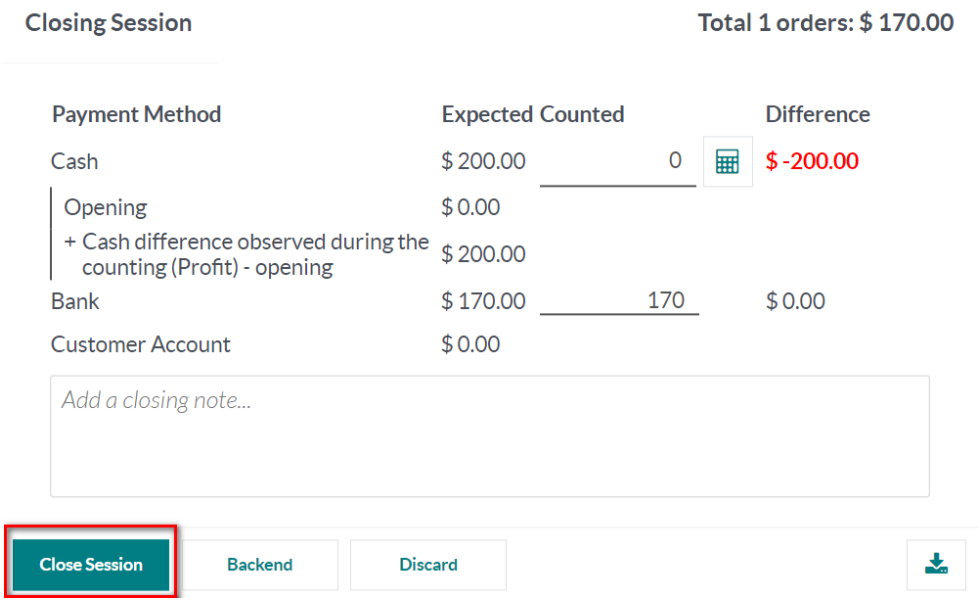
Screenshot 38: Van point of sale – Approve Unload Transfer:

- *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*.



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.