

User Manual

# Van Sales POS Plugin for Odoo v18.0



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# 1. Introduction

The Van Point of Sale module is easy to install and seamlessly integrates with the Odoo web shop. This module introduces specialized features tailored for van sales operations. All products are managed through the warehouse, with inventory fully controlled by the module. The process begins with loading products onto the van and concludes with unloading any unsold items back into the warehouse.

# 2. Features

- Effortless Configuration: Easily set up a POS system specifically for van sales.
- Van Stock Recording: Keep detailed records of all van stock.
- Loading and Unloading Tracking: Monitor and log product loading and unloading processes.
- Session-Based Management: Sessions are primarily managed based on the loading and unloading activities.
- Integrated Stock Control: Seamlessly manage stock through the inventory module.
- Transparent Stock Transfer History: Maintain a clear and accessible history of stock transfers.
- Enhanced POS Features: Introduces additional functionalities to the existing pointof-sale module.
- User Group Management: Includes predefined roles for salesmen and supervisors.



# 3. Screenshots

Screenshot 1: Van Point of Sale - Adding Salesman or Supervisor User Groups

- Navigate to **Settings** in Odoo.
- Click on 'Activate the Developer Mode' to enable advanced features.

III Settings General	Settings Users & Companies Translations Technical		🐞 髨 👶 My Company (San Francisco)
Save Discard Sett	ings	Q Search	
🟮 General Settings	Protect your forms from spam and abuse.	Protect your forms with CF Turnstile.	
Inventory	Performance		
<ul> <li>Invoicing</li> <li>Fleet</li> <li>Point of Sale</li> </ul>	Profiling enabled until Enable the profiling tool. Profiling may impact performance wh being active.	ile	
	Developer Tools		
	Activate the developer mode (with assets) Activate the developer mode (with tasts assets) Descrivate the developer mode		
	About		
		0 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
	Odoo 18.0 (Community Edition) Copyright © 2004 Odoo S.A. GNU LGPL Licensed		

- Navigate to the Users & Companies menu and select Users.
- Open the desired user profile.
- Enable the Salesman or Supervisor role.
- Click **Save** to apply the changes.



<b>EXAMPLE :</b> Settings General Settings Users & Companies Tra	nslations Technical	π ,	O <sup>4</sup> My Company (San Francisco)	Mitchell Ad			
Users / Mitchell Admin			🔒 Print	Action	1/1	$\langle \rangle$	New
SALES		ACCOUNTING					
Point Of Sale ? Administrator		Invoicing ? Billing Administrator					
INVENTORY		HUMAN RESOURCES					
Inventory <sup>?</sup> Administrator		Fleet ? Administrator					
ADMINISTRATION							
Administration ? Settings							
VAN SALES							
Salesman ?		Supervisor ?					
TECHNICAL							
A warning can be set on a partner (Account) ?		A warning can be set on a partner (Stock) ?					
Access to Private Addresses ?	0	Access to export feature ?					
Advanced Pricelists ?		Allow the cash rounding management ?					
Analytic Accounting ?		Basic Pricelists ?					
Delivery Address ?		Discount on lines ?					
Display Serial & Lot Number in Delivery Slips		Display Serial & Lot Number on Invoices ?					
Mail Template Editor ?	0	Manage Different Stock Owners ?					

#### Additional Step: Granting Supervisor Administrative Access

- After enabling the **Supervisor** role for a user, scroll down to the **Access Rights** section in the user's profile.
- Modify the Administration Access setting to provide the required level of administrative privileges (e.g., Settings or Full Access).
- Click **Save** to apply the changes.
- This step ensures the Supervisor role has appropriate administrative access to manage van sales efficiently.

Exectings General Settings Users & Companies Translations Technical		🔍 <sup>2</sup> C. <sup>1</sup> 🔼
Users Users D P O O	Groups IIII Access Rights IIII Record Rules 23 100 100 100 100 100 100 100 100 100 10	2/5 < >
Portal     Public		•
SALES	ACCOUNTING	
Sales <sup>7</sup> Administrator	Involcing <sup>?</sup> Billing Administrator	
Point of Sale <sup>7</sup> Administrator	Bank	
INTERPORT	UIIMAN BEPOILBEE	
	TOWNER RESOURCES	
Inventory * Administrator	Fleet Administrator	
ADMINISTRATION	OTHER	
Administration Settings	- Dashboard ?	
VAN SALES		
Salesman 🖉	Supervisor	
TECHNICAL		
A warning can be set on a partner (Account)	A warning can be set on a partner (Stock)	
A warning can be set on a product or a customer (Sale)	Access to export feature	
Advanced Pricelists	Allow the cash rounding management	
Analytic Accounting	Basic Pricelists	
Delivery Address	Discount on lines	
Display Serial & Lot Number in Delivery Slips	Display Serial & Lot Number on Invoices	
Lock Confirmed Sales	Mail Template Editor	
Manarie Different Stock Owners	Manane Lots / Serial Numbers 🛛 🖻	

Screenshot 2: Van Point of Sale - Enabling Storage Locations

- Navigate to **Settings** -> **Inventory** in Odoo.
- Locate the **Storage Locations** option.
- Check the Enable Storage Locations box.
- Click **Save** to apply the changes.
- This configuration allows the management of specific storage locations for van stock and inventory tracking.



Point of Sale Das	board Orders Products Van Stock Transfer Unload Reporting Cor	figuration	🐞 🕵 6 🛃 My Company (San Francisco) 😻 Mitchel Admin 🔤 v15_pos_van_sale_2
Save Discard Settin	igs	Q Search_	
C General Settings			
inventory	Traceability		
<ul> <li>Invoicing</li> <li>Fleet</li> <li>Point of Sale</li> </ul>	Lots & Serial Numbers      Get a full traceability from vendors to customers     Print GS1 Barcodes for Lots & Serial Numbers     Use GS1 nonenclature datamatic whenever barcodes are     printed for folds and serial numbers.	Expiration Dates  Set expiration dates on lots & serial numbers	
	Display Lots & Serial Numbers on Delivery Slips Lots & Serial numbers will appear on the delivery slip	Consignment @ Set owner on stored products	
	Valuation		
	Landed Costs      Add additional cost (transport, customs,) in the value of the product.	Display Lots & Serial Numbers on Invoices Lots & Serial numbers will appear on the invoice	
	Warehouse		
	<ul> <li>Storage Locations</li></ul>	Multi-Step Routes Use your own routes	
	Logistics		
	Dropshipping O Request your vendors to deliver to your customers		

Screenshot 3: Van Point of Sale - Locations Menu Item

- Navigate to Inventory in Odoo.
- Go to Configuration -> Locations.

This menu allows you to view, manage, and configure storage locations used for van sales operations.

Inventory Overview Operations Products Re	porting	Configuration						÷ 9	Administrator
Inventory Overview		Settings Warehouse Management	Q Search			•			1-7/7 < >
Receipts : 0 To Process	inter 0 To	Warehouses Locations Operations Types Putaway Rules Products	I	Delivery Orders 0 To Process	I	PoS Orders 0 To Process	I	VAN SALE 0 To Process	1
VAN SALE LOAD : 0 To Process	VAN 0 Te	Product Categories Reordering Rules Barcode Nomenclatures	ł						

#### Screenshot 4: Van Point of Sale – Locations List View

The Locations List View provides a detailed summary of all storage locations. It displays:

- Location Name: Identifies each storage location.
- Location Type: Indicates whether the location is internal, external, or customer related.
- **Parent Location**: Shows the hierarchical structure of the locations.

This view simplifies the management of van stock by offering quick access to modify or update location settings.

Inventory Overview Operations Products Reporting Configuration			🏦 🛸 🚺 My Company (San Francisco)
New Locations &	Q T Internal X Search	•	
Location	Location Type	Is Empty Storage Category	Company
O Van	Internal Location		My Company (San Francisco)
WH/Input/Order Processing	Internal Location	0	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone	Internal Location	٥	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location	٥	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone/Gate B	Internal Location	0	My Company (San Francisco)
WH/Stock	Internal Location		My Company (San Francisco)
WH/Stock/Shelf 1	Internal Location	٥	My Company (San Francisco)
WH/Stock/Shelf 2	Internal Location		My Company (San Francisco)
WH/Stock/Shelf 2/Small Refrigerator	Internal Location	٥	My Company (San Francisco)
		-	nny aangang gan rannaag

Screenshot 5: Van Point of Sale – Adding a New Location

- Go to the Inventory module in Odoo.
- Navigate to **Configuration** -> Locations.
- Click **Create** to add a new location.
- Enter the required details, such as:
  - Location Name: Name of the new location.



- **Location Type**: Specify the type (e.g., internal, customer, supplier).
- **Parent Location**: Select the parent location if applicable.
- Click Save to complete the setup.

This process enables the creation of storage locations for managing van stock efficiently.

		🔀 Putaway Rules 🔗 Current Stock
Location Name <sup>7</sup> e.g. Spare S Parent Location <sup>7</sup> e.g. Physical Loc	tock	
ADDITIONAL INFORMATIO	л	CYCLIC COUNTING
Location Type ? Company ? Is a Scrap Location? ? Is a Return Location? ? Replenish Location ? External note	Internal Location My Company (San Francisco)	Inventory Frequency 0 (Days) <sup>7</sup> Last Effective Inventory <sup>7</sup> Next Expected Inventory <sup>7</sup>

Screenshot 6: Van Point of Sale - Operation Types

- Go to the **Inventory** module in Odoo.
- Navigate to Configuration -> Operation Types.

This menu allows you to configure and manage different operation types, such as loading and unloading stock for van sales.



Inventory Overview		Settings	Q Search			•		1-7/7 < >
Receipts I O To Process	Inter 0 Te	Warehouse Management Warehouses Locations Operations Types Putaway Rules Products	I	Delivery Orders 0 To Process	I	PoS Orders 0 To Process	VAN SALE 0 To Process	I
VAN SALE LOAD	VAN 0 Tr	Product Categories Reordering Rules Barcode Nomenclatures	:					

#### Screenshot 7: Van Point of Sale Operation Type - VAN\_SALE

- The VAN\_SALE operation type is designed for transferring stock from the van to partner or customer locations.
- This operation facilitates efficient tracking and management of product sales directly from the van.

Inventory Overview Operations Products Reporting Configuration		¥ 🔍 Ø 🔺 Administrator ∎ v17_pos_ven
New Operations Types My Company: VAN SALE •		1/1 < >
Operation Type <sup>†</sup> VAN SALE General Hardware Type of Operation <sup>†</sup> Delivery Reference Sequence <sup>†</sup> Van Stock Transfer Sequence Sequence Prefix <sup>†</sup> VS Reservation Method <sup>†</sup> At Confirmation Manually Before scheduled date	Returns Type <sup>†</sup> Default returns location <sup>7</sup> Create Backorder <sup>7</sup> Ask	
LOTS/SERIAL NUMBERS	LOCATIONS	
Create New <sup>7</sup>	Default Source Van Location <sup>7</sup> Default Destination Partners/Customers Location <sup>7</sup>	



#### Screenshot 8: Van Point of Sale Operation Type - VAN\_SALE\_LOAD

- The VAN\_SALE\_LOAD operation type manages the transfer of stock from warehouse locations to the van before the sales process begins.
- This operation ensures that the van is properly stocked with products needed for the sales session.

Inventory Overview Operations Products Reporting Configuration		¥ 🔍 <sup>2</sup> ⊙ 🔥 Administrator ∎ v17_pos_van
New Operations Types My Company: VAN SALE LOAD ©		6/7 < >
Operation Type ? VAN SALE LOAD General Hardware Type of Operation ? Internal Transfer Reference Sequence ? Van Stock Transfer Sequence Sequence Prefix ? VSL Reservation Method ? O At Confirmation	Returns Type ? Default returns location ? Create Backorder ? Ack	
LOTS/SERIAL NUMBERS Create New <sup>7</sup> Use Existing ones <sup>7</sup>	LOCATIONS Default Source WH/Stock Location ? Default Destination Van Location ?	

#### Screenshot 9: Van Point of Sale Operation Type - VAN\_SALE\_UNLOAD

- The VAN\_SALE\_UNLOAD operation type handles the transfer of unsold products from the van back to the warehouse after the sales session is completed.
- This operation ensures accurate inventory updates and proper management of returned stock.

Inventory Overview Operations Products Reporting Configuration		≆ 🧟 🧿 🚺 Administrator ∎ v17_pos_van
New Operations Types My Company: VAN SALE UNLOAD		7/7 < >
Operation Type ? VAN SALE UNLOAD General Hardware Type of Operation ? Internal Transfer Reference Sequence ? Van Stock Transfer Sequence Sequence Prefix ? VSU Reservation Method ? • At Confirmation	Returns Type <sup>2</sup> Default returns location <sup>7</sup> Create Backorder <sup>7</sup> Ack	
LOTS/SERIAL NUMBERS Create New <sup>1</sup> Use Existing ones <sup>7</sup>	LOCATIONS Default Source Van Location <sup>2</sup> Default Destination WH/Stock Location <sup>2</sup>	

#### Screenshot 10: Create a Van in Fleet Management

- Navigate to the Fleet Management module in Odoo.
- Click on **New** to create a new van entry.
- Enter the required details:
  - **Driver**: Assign a driver for the van.
  - Fleet Manager: Specify the fleet manager, who will also act as the Salesman for the van.
  - Other relevant van details (e.g., license number, vehicle type).
- Click **Save** to complete the setup.

This process ensures that each van is properly linked to a driver and a fleet manager, facilitating seamless operations in the Van Sales POS workflow.



III Fleet Fleet Reporting Configuration							æ 🧟 Ø 🚺 Administrator ∎v17_pos_van
New Vehicles //No Plate 🌣 🕼 🕽		Drivers History	Contracts 0				
		New Request To O	rder Registered	Downgraded	Send message Log note Activit	ies	Q 🗞 🖯 Follow
Model ? e.g. Model S		•				Today	
License Plate <sup>7</sup> e.g. PAE 326				÷	A Administrator - now Creating a new record		
Tags ?							
DRIVER	VEHICLE						
Driver ?	Category ?						
Future Driver ?	Order Date ?						
Assignment Date <sup>7</sup>	Chassis Number ?						
	Fleet Manager ?						
	Location ?						
Tax Info Model Note							
ELCCALITY.	CONTRACT						
Horsebower Taxation ? ₹0.00	CONTRACT						
	First Contract Date 6	08/28/2024					
	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** in Odoo.
- Navigate to Point of Sale.
- Click on **New Shop** to create a new POS configuration.

This step allows you to set up a new Point of Sale instance that can be tailored for van sales operations.



Point of Sale Das	hboard	Orders Products Van Stock Transfer Unload Reporting Conf	iguratio		<b>\$</b> <sup>2</sup> ⊘ A
Save Discard Setti	ngs		<b>Q</b> Sea	h	
General Settings	Point	of Sale Shop (not used) - New Shop			Î
Invoicing	Resta	urant Mode			
Fleet		ls a Bar/Restaurant			
	Paym	ent			
		Payment Methods         Payment methods available         Cash X       Bank X         Castomer Account X       →         → Payment Methods         Cash Rounding O         Define the smallest coinage of the currency used to pay by cash         Tips         Accept customer tips or convert their change to a tip		Automatically validates orders paid with a payment terminal. Automatically validates orders paid with a payment terminal. Set Maximum Difference Set a maximum difference allowed between the expected and counted money during the closing of the session	
	PoS Ir	nterface			
		Start Category Start selling from a default product category		Multi Employees per Session Allow to log and switch between selected Employees	
		Restrict Categories Pick which product categories are available		Large Scrollbars Improve navigation for imprecise industrial touchscreens	
		Margins & Costs		Share Open Orders	

#### Screenshot 12: Enter New POS Details

- After clicking **New Shop** in the **Point of Sale** section, you will be prompted to enter details for the new POS.
- Fill in the required information, such as:
  - **POS Name**: Name for the new Point of Sale instance.
  - Other relevant details: Configure additional settings based on your business needs.
- Click **Save** to finalize the setup.

This step ensures that the new POS is correctly configured to support van sales operations.

❀ Odoo	×
Point of Sale ? e.g. NYC Shop	_
Is a Bar/Restaurant ?	
SAVE DISCARD	

### Screenshot 13: Edit New POS

- Go to the **POS** module in Odoo.
- Locate the newly created POS.
- Click on the three-dot menu next to the POS and select Edit.

This allows you to make modifications or fine-tune the settings of the newly created Point of Sale instance.

Point of Sale Dashboard	d Orders Products Van Stock Tr	ansfer Unload Reporting	Configuration	
Point of Sale			Q Search	•
Shop		I	Test Shop	1
New Session	Closing Balance	08/28/2024 ₹ 0.00	New Session	View Reporting Orders Orders Sessions
				Edit



#### Screenshot 14: Configure New POS to Van Sale POS

- In the Edit POS screen, enable the Is Van POS checkbox to configure the POS as a Van Sale POS.
- Add a **van** to the POS setup.
- Add the operation types of VAN\_SALE, VAN\_SALE\_LOAD, and VAN\_SALE\_UNLOAD to the POS configuration.
- Click **Save** to apply for the changes.
- This configuration tailors the POS system for van sales operations, ensuring that the necessary operation types are linked to efficient stock management and sales tracking.





#### Screenshot 15: Van Point of Sale - Van Stock Transfer Load

- Go to the **Inventory** module in Odoo.
- Navigate to the **Operations** menu and select the **Van Stock Transfer** menu item.
- This process is defined under the operation type: VAN\_SALE\_LOAD.
- Ensure that the van is loaded with products before opening the related POS session.

This process ensures that all necessary products are transferred to the van before beginning the sales session.

Inventory Overview								
Inventory Overview	Transfers Receipts		Q Search			-		1-7/7 < >
Receipts	Deliveries Internal	Internal Transfers	1	Delivery Orders I	PoS Orde	rs I	VAN SALE	1
0 To Process	Adjustments Physical Inventory Scrap	0 To Process		0 To Process	0 To Proc	.015	0 To Process	
VAN SALE LOAD	Procurement Replenishment	VAN SALE UNLOAD	i.					
0 To Process	Van Stock Transfer Load Run Scheduler	0 To Process						

#### Screenshot 16: Van Point of Sale - Create Van Stock Transfer Load

- Select the **POS** associated with the van sales.
- Add the **products** to the van that need to be loaded for the sales session.
- Click Initiate Transfer to start the stock transfer process.

This step ensures that the selected products are transferred from the warehouse to the van for the sales session.



Inventory Overview Operations Products Reporting Configuration					🔹 🔜 🖉 🕢 🔥 Administrator
New UCAPUTRANSIME A					1/1 < >
Initiate Transfer Cancel		Draft Waiting Loaded	Approved	Send message Log note	Q 𝔇 ≙ <sup>1</sup> Following
LOAD/TRANS/016					Today
Company <sup>7</sup> My Company	Picking Type <sup>?</sup> Load			Administrator - now	
Point of Sale <sup>?</sup> Test Shop (not used)	Date ? 08/28/2024 18:58:48			A van.stock.transfer created	
Supervisor <sup>7</sup> Administrator	Can Approve 7				
	Can View 7 🛛 🗹				
	Can Cancel <sup>7</sup>				
VAN DETAILS					
Van <sup>7</sup> Audi/A1/BR092583					
Salesman <sup>7</sup> kk					
Onerstiens Other Informations					
Product		Demand	Done		
Test Product		1.00	0.00 🚖		
Add a line					

#### Screenshot 17: Insufficient Stock Validation During Van Stock Transfer

- If there is insufficient stock for a product, the system will prevent initiating the transfer. It will raise a validation error to indicate the lack of stock.
- While initiating the transfer, if the available stock is less than the required amount, the system will display an error message, preventing the transfer from proceeding.

This ensures that stock transfers are only initiated when sufficient inventory is available.

Inventory Overview Operations Products Reporting Configuration			
New UcaD/TRANS/016			1/1 < >
Initiate Transfer Cancel	Draft Waiting Loaded Approved	Send message Log note	Q, 왕 윤 <sup>1</sup> Following
LOAD/TRANS/016		Today	
Company My Company Point of Sale <sup>1</sup> See Shop (not used) Supervisor <sup>1</sup> Administrator	Pooling type Lovo Date <sup>2</sup> 06/28/2024 1555-45 Can Approve <sup>1</sup> Can View <sup>1</sup>	Administrator now var.stocktransfer overted	
VAN DETALS Van <sup>1</sup> Audr/A1/80092583 Salesman <sup>1</sup> Mc Operations Other Informations	Validation Error Insufficient stock for product. Please adjust the quantities or restock the product before creating the transfer.	X a	
Product	Demand Done		
Test Product	1.00 0.00 🖨		
Add a line			



#### Screenshot 18: Van Point of Sale – View the Created Transfer

If there is sufficient stock, the transfer will be initiated successfully. You can view the created transfer in the system.

- After initiating the transfer, if the stock is available, the system will show the created transfer details.
- The transfer will be marked as **initiated** and ready for approval or validation.

This step ensures that only valid stock transfers are processed, and the details of the transfer can be monitored.

Inventory Overview Operations Products Reporting Configuration		<b>≇</b> ¶ <sup>2</sup>	Ø Administrator ■ v17_pos_van
New Van Sales Stock Transfer LOAD/TRANS/016 •	→ Transfers 1		1/15 < >
Reject Cancel	Draft Waiting Loaded	Approved Send message Log note	Q % 8 <sup>1</sup> Following
LOAD/TRANS/016		Today	
Company <sup>1</sup> My Company	Picking Type <sup>2</sup> Load	Administrator - now	
Point of Sale <sup>7</sup> Test Shop (not used)	Date <sup>1</sup> 08/28/2024 18:58:48	<ul> <li>A Draft → Loaded (Status)</li> </ul>	
Supervisor <sup>7</sup> Administrator	Can Approve 1	Administrator - 2 minutes ago	
	Can View 7	van.stock.transfer created	
	Can Cancel 7		
VAN DETAILS			
Van <sup>1</sup> Audi/A1/BR092583			
Salesman <sup>†</sup> kk			
Operations Other Informations			
Product	Demand	Done	
Test Product	1.00	0.00 🚖	
Add a line			

#### Screenshot 19: Van Point of Sale - Logged in as a Salesman

When logged in as a salesman, you will not have the permission to validate the transfer.

- If you are logged in as a salesman, you can view the transfer but cannot approve or validate it.
- To validate the transfer, you need to contact your **supervisor** who has the necessary permission to approve the transfer. If you are logged in as salesman, you cannot validate the transfer.

This ensures that only authorized personnel (supervisors) can validate the stock transfer, maintaining proper oversight.



III Inventory Overview Operations Products Reporting Configuration		
New UciAD/TRANS/124 0	Transfers	1/10 < >
Cancel	Draft Waiting Loaded Approved	Send massage Log note Q. 🛞 🖂 Tollowing
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/124 Company / My Company Point of Sale (* Strip (not used) Supervisor / Administrator	Picking Type <sup>1</sup> Load Date <sup>7</sup> 00/09/2024 16:14:05	Today           JP - 9 minutes app           + 0 minutes app           + 0 minutes app           JP - 9 minutes app           variable/charander created
Van DETAILS           Van <sup>1</sup> Audi/A3/8809           Salesman <sup>1</sup> 2P           Operations         Other Informations           Product         Context (Context (Conte	Validation Error >> You can not Validate the Transfer. Please contact to your Supervisior to Validate the Transfer Come	×
	5.00 0.00	

• Each **salesman** can only view their own records within the system. They will not have access to transfers or data related to other salesmen.

This ensures data privacy and prevents cross-access between different sales representatives.

Inventory Overview Operations	Products Reporting Configuration						* 📲 O 🚺 🖁 v17_scs_var
New Van Sales Stock Transfer 🌣		Q Search		-			1-9/9 < >
Date 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/A3/8R09	JP	Dvaft
09/05/2024 16:56:37	LOAD/TRANS/121	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Approved
09/05/2024 15:17:19	LOAD/TRANS/112	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Loaded
09/05/2024 13:48:14	LOAD/TRANS/111	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Loaded
09/05/2024 13:47:09	LOAD/TRANS/110	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Dvaft
09/05/2024 13:39:12	LOAD/TRANS/103	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Completed
09/05/2024 13:18:49	LOAD/TRANS/094	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Completed
09/05/2024 12:31:59	UNLOAD/TRANS/093	Unload	Test Shop (not used)	Administrator	Audi/A3/8R09	- PL	Completed
08/28/2024 18:58:48	LOAD/TRANS/016	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	9L	Completed



#### Screenshot 20: Van Point of Sale – Validate Transfer

- Only a **supervisor** has the authority to validate the transfer.
- The **supervisor** can review the transfer details and click on **Validate** to approve the transfer.
- Salesmen will not have the option to validate transfers.

This ensures that transfers are properly authorized and managed by a supervisor, maintaining control over stock movements.

Inventory Overview Operations Products Reporting Configuration					* 🔍 O 🚺 Administrator
New / LOAD/TRANS/016 / Transfers		Detailed Operations			1/1 < >
Validate Print Labels Cancel		Draft Waiting	Ready Done	Send message Log note Activities	Q % ⊜ <sup>1</sup> Following
☆ /STOCK_TRANS/019				Too	day
Contact <sup>?</sup>	Scheduled Date 7	08/28/2024 18:58:48		A Administrator - 47 seconds ago Transfer created	
Operation Type <sup>7</sup> My Company: VAN SALE LOAD	Source Document 7				
Source Location 7 WH/Stock					
Destination Location <sup>7</sup> Van					
Operations Additional Info Note					
Product	Demand	Quantity	≠		
Test Product	1.00	1.00 📠	= 8		
Add a line					

#### Screenshot 21: Van Point of Sale – Reject or Cancel Transfer

Before the transfer is approved, you can choose to reject or cancel the transfer. However, once the transfer is validated, it cannot be rejected or cancelled and attempting to do so will raise a validation error.

- Go back to the Load Transfer record.
- Click on **Reject and Cancel** to reverse the transfer if needed before validation.
- Once the transfer is validated, the **Reject and Cancel** option will be disabled, and any attempt to cancel will raise an error.

This ensures that transfers cannot be undone once they are validated, maintaining accurate records of stock movements.



Inventory Overview Operations Products Reporting Configuration		â Ra <sup>2</sup> O ∧ Administrator
New Van Sales Stock Transfer LGAD/TRANS/015 O	teet 1 Transform	1/15 🔇 🗴
Approve Reject Cancel	Draft Waiting Leaded Approved	Send message Log note Q 🗞 👌 Following
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/016       Company     My Company       Point of Sale ?     Set Shop (not used)       Supervisor ?     Administrator	Picking Type ' Load Date ' 09/20/2024 18:56-45 Can View ' C Can View ' C Validation Error No cannot nyect a transfer in Done' state. To proceed. click on the Transfers smart button, and create a return for the transfer (STOCK, TRAHS/019).	Administrator:     1 ministrator       • Orati:     - Loaded (Samu)       Administrator:     - ministrator       Manifold Construction Spin       Variatod Construction Spin
Product	Demand Done	
Test Product	1.00 1.00 😫	
Add a line		

Inventory Overview Operations Products Reporting Configuration		LA	
New Van Sales Stock Transfer LOAD/TRANS/016 -0	Transfers 1		1/15 < >
Approve Reject Cancel	Draft Waiting Loaded Approved	Send message Log note	Q N S <sup>1</sup> Following
Validate the Transfer(s) to approve this Van stock transfer EOAD/TRANS/016       Company     My Company       Peter of Sale <sup>1</sup> Test Shop (not used)       Superviser <sup>2</sup> Administrator   VAN DETAILS Van <sup>2</sup> Addit/15005033 Salesman <sup>1</sup> K Operations Other Informations	Pedang Type 1 Load Data 1 08(28)(2004 18:56.48 Can Approve 2 2 Can Mereo 7 2 Validation Error You cannot cancel a transfer in Done' ritata. To proceed, disk on the Transfers smart buttor, and create a return for the transfer (STOCK_TRANS;019).	Today       Administrator - Landed (Sotta)       Administrator - 4 ministra ago van nocktrander creeted	
Product	Demand Done		
Test Product	1.00 1.00 🗑		
Add a line			



#### Screenshot 22: Van Point of Sale - Create Return for Rejected Transfer

If a transfer is rejected and you need to return the stock to the warehouse, you can create a return process to move the products back.

- Click on the **Transfers** smart button.
- Navigate to **Transfers** to view and manage the return process.

This allows the stock to be returned to the warehouse and ensures inventory records are updated accordingly.

Inventory Overview Operations Products Reporting Configuration		¥ 🧟 O 🔥 A Administrator ∎ v17_pos_van
Van Sales Stock Transfer LOAD/TRANS/D16 🌢	Transfers	1/15 🔇 🗲
Cancel	Draft Walting Loaded Approved	Send message Log note Q 🗞 👌 Following
LOAD/TRANS/016           Company <sup>1</sup> My Company           Point of Sale <sup>2</sup> Test Shop (not used)	Picking Type <sup>7</sup> Load Date <sup>7</sup> 08/28/2024 18:58:48	Today Administrator - 18 hours ago • Loaded → Approved (Stotus)
Supervisor <sup>7</sup> Administrator Pos Session <sup>7</sup>	Can Cancel <sup>2</sup>	Administrator - 18 hours ago • Draft — Loaded (Stotus) Administrator - 18 hours ago van.stocktransfer created
VAN DETAILS           Van <sup>1</sup> Audi/A1/8R092583           Salesman <sup>1</sup> kk           Operations         Other Informations		
Product	Demand Done	
Test Product	1.00 1.00	



#### Screenshot 23: Van Point of Sale – Create Return

- After navigating to **Transfers**, click on the **Return** button.
- This will initiate the return process to move the rejected or canceled products back to the warehouse.

This ensures that products are properly returned, and inventory is accurately updated.

Inventory Overview Operations Products Reporting Configuration		🔹 🔍 O 🚺 Administrator
New / LOAD/TRANS/016 / Transfers /STOCK_TRANS/019 Ø		1/1 < >
Print Labels Print Return	Draft Waiting Ready Done Send message Log note Activities	Q % A <sup>1</sup> Following
☆ /STOCK_TRANS/019	August 28, 20;	14
Contact <sup>2</sup> Operation Type <sup>2</sup> My Company: VAN SALE LOAD Source Location <sup>1</sup> Wh/(Stock Destination Location <sup>2</sup> Van Operations Additional Info Note	Scheduled Date <sup>7</sup> 06/28/2024 18:58:48 Administrator - 18 hours age Effective Date <sup>7</sup> 06/28/2024 19:03:40 Source Document Administrator - 18 hours age Transfer created	
Product	Demand Quantity 📫	
Test Product	1.00 1.00 🖿	

#### Screenshot 24: Van Point of Sale – Validate the Return

Once the return is created, you need to validate it to update the stock in the warehouse.

- After clicking **Return**, validate the return to move the stock back to the warehouse.
- Once validated, the products will be returned to the warehouse inventory, and stock levels will be updated accordingly.

This step ensures that the returned products are properly accounted for, and the inventory is synchronized.



Inventory Overview Operations Products Reporting Configuration						* 💐 G	0 🔺 💼	ministrator v17_pos_van
New / Transfers / /STOCK_TRANS/019 /STOCK_TRANS/020 •		Detailed Operations					1/1	< >
Validate Print Print Labels Cancel		Draft Wa	ting Ready	Done	Send message Log note Activities	Q		Following
イ /STOCK_TRANS/020 Contact <sup>†</sup>	Scheduled Date <sup>7</sup>	08/29/2024 13:38:15			A Administrator - now This transfer has been created from: /STOCK_TRANS/019			
Source Location <sup>7</sup> Van Destination Location <sup>7</sup> WH/Stock Constitute Constitute Additional Info	Source Document <sup>?</sup>	Return of /STOCK_TRANS/019			A Administrator - now Transfer created			
Product	Demand	Quantity		z				
Test Product	1.00	1.00	=	ŧ				
Add a line								

#### Screenshot 25: Van Point of Sale - Load Transfer Approval

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

This ensures that the load transfer is validated by an authorized person (supervisor), maintaining control over inventory movements.



Inventory Overview Operations Products Reporting Configuration				¥ < 2 O A Administrator ■ v17_pos_van
New LOAD/TRANS/017 <b>\$</b>		→ Transfers 1		1/16 < >
Approve Reject Cancel		Draft Waiting Loaded Approved	Send message Log note	Q % ≙ <sup>1</sup> Following
Validate the Transfer(s) to approve this Van stock transfer				Today
Company <sup>2</sup> My Company	Picking Type ? Load		A Administrator - now • Draft → Loaded (Status)	
Point of Sale <sup>2</sup> Test Shop1 (not used) Supervisor <sup>2</sup> Administrator	Date ? 08/29/2024 13:43:13 Can Approve ?	3	A Administrator - now van.stock.transfer created	
	Can View ?			
	Can Cancel ?			
VAN DETAILS				
Van <sup>?</sup> Audi/A1/BR092583				
Salesman ? kk				
Operations Other Informations				
Product	Demand	Done		
Test Product	10.00	10.00 會		
Add a line				

#### Screenshot 26: Van Point of Sale - Van Stock Transfer Load Approval

Once the **Van Stock Transfer Load** is approved, you cannot create another transfer load for the same session. Attempting to do so will raise a validation error.

- After approving the transfer, any new stock transfer load for the same session will not be allowed.
- You must complete the previous load before initiating a new transfer.

This ensures that each load is properly processed before a new one can begin, maintaining an organized and accurate stock transfer process.



Inventory Overview Operations Products Reporting Configuration						i	Administrator
New Van Sales Stock Transfer LOAD/TRANS/018 ©							1/1 < >
Initiate Transfer Cancel		Draft Waiting	Loaded	Approved	Send message Log note		Q 🗞 👌 Following
LOAD/TRANS/018						Today	
Company <sup>2</sup> My Company	Picking Type <sup>2</sup> Load				Administrator - now		
Point of Sale 7 Test Shop1 (not used)	Date 08/29/2024 13:44:44				van.stock.transfer created		
Supervisor <sup>7</sup> Administrator	Can Approve <sup>2</sup>						
	Can View 7						
	Can Cancel 7						
Van <sup>7</sup> Audi/A1/6R092583 Salesman <sup>7</sup> kk Operations Other Informations	Validation Error LOAD/TRANS/017 is in approve state o	complete the same and app	prove next trai	) nsfer	<		
Product		U	emand s oo	Done			
Add a line				0.00 E			

Screenshot 27: Van Point of Sale – Open New POS Session

- 1. Go to the **Point of Sale** module.
- 2. Select the Van POS that has been configured for the sales session.
- 3. Click on **Open Session** to begin the new POS session.

This step starts the new sales session for van operations, allowing transactions to be processed for the day.



Point of Sale Dashboard	Orders Products Van Stock Tr	ansfer Unload Reporting	Configuration			₩ 🔍 🗿 🛕 Administrator
Point of Sale			Q Search	•		1-3/3 < >
Shop		I	Test Shop	I	Test Shop1	I
New Session	Closing Balance	08/28/2024 ₹ 0.00	Continue Selling	A	New Session	

#### Screenshot 28: Van Point of Sale – POS Open Control

When opening the POS, the system prompts for an **Opening Note**. This is an optional field where users can enter additional details about the session or leave it blank.

- When opening the POS session, a prompt will appear asking for an **Opening Note**.
- Users can either input a note or leave the field empty.
- Click on **Open Register** to proceed with the session.

This allows flexibility in managing the session, with the option to add notes for reference or reporting.



• 401		odoo	<b>Q</b> Search products	🛄 🎯 Mitchell Admin 🚍
	Breads	Chairs De	sks Lower body	Misc Others
	Pastries	Upper body		
	Opening Control			
-	Opening note			
Start adding	Add an opening note			
products	Open Register Discard			
	Open Register Distant		_	
Customer Internal Note	Actions			

#### Screenshot 29: Van Point of Sale - Sell the Loaded Products

- In the POS interface, only Van Location Products will be visible, representing the products loaded onto the van.
- Click on the desired **product** to add it to the cart.
- Once the products are added, click on **Payment** to proceed with the transaction.

This ensures that only the products available on the van are sold during the session, maintaining accurate inventory control.



<b>O</b> 701					odoo	Q Search products	S Mitchell Admin	≡
Test Product 1.00 x ₹ 1.06	/ Units		र 1.05	Test Product				
Taxes Total			₹ 0.06 <b>₹ 1.06</b>					
Customer	Internal Note		Actions					
1	2	3	Qty					
4	5	6	%					
7	8	9	Price					
+/-	0							
	Payn	nent						

#### Screenshot 30: Van Point of Sale – For Real-Time Stock Update

- Activate Developer Mode in Odoo.
- Go to the **POS** module.
- Click on the **Configuration** menu.
- Select the **Settings** menu.
- Under the settings, choose the **In real time** option for accurate stock updates.

This option ensures that stock levels are updated in real time, reflecting changes immediately, although it may slightly impact performance.

# Van Sales POS Plugin for Odoo v18.0

Point of Sale Dast								🔍 <sup>2</sup> 🕗 🔺
Point of Sale		(	Settings Payment Methods		•		1-4	/4 < > [₽] ■
Shop		I	Coins/Bills Point of Sales		i	Test Shop1		I
New Session	Closing Balance	08/28/2024 ₹ 0.00	Products PoS Product Categories Taxes			Continue Selling	Closing	09/02/2024
M SHOP		1						
New Session	Closing	08/30/2024						
Point of Sale Da	ishboard Orders Products Va	n Stock Transfer Unioad – Repo	nting Configuration				<b>≝ ጫ</b> 6 6,4 м)	/ Company (San Francisco)
Save Discard Set	tings		Q Search					
O General Settings	Connect device to you	r PoS without an IoT Box	Sh	ow checkout to customers through a secon	d display			
Inventory			Th Ba	e same device •				
Invoicing  Fleet  Roint of Sale	Connect devices using	an IoT Box		Jpload your file				
	Preparation							
	Preparation Printers           Print orders at the lated           Internal Notes           Add internal notes on           Note Models           → Notes	hen, at the bar, etc. order lines for the kitchen	Dis	sparation Display	Enterprise			
	Inventory							
	Operation Type Used to record produc default source location YourCompany: VAN Si	tt pickings. Products are consum 3. ALE → →	AB Area Area Area Area Area Area Area Area	ow Ship Later I products and deliver them later.				
	Barcodes () Use barcodes to scan p Barcode Defa Nomenclature	products. customer cards. etc. ault Nomenclature   •   →	inv Up O	ventory Management				

pits



#### Screenshot 31: Van Point of Sale – Sell the Loaded Products

The system will not allow you to sell more than the available quantity in stock.

• If you attempt to sell a quantity exceeding what is available in the van, the system will display an error message, preventing the transaction.

This feature ensures that sales transactions are consistent with the available inventory, preventing overselling.



#### Screenshot 32: Van Point of Sale - Sell the Loaded Products

- Select a payment method (e.g., Bank or Cash) for the transaction.
- After selecting the payment method, click Validate Payment to complete the sale.

This step ensures that the payment is processed, and the transaction is finalized.

pits			Van S	Sales POS F	Plugin for Odoo v18.0
« Back			Payment		
Payment method	Remaining ₹ 0.00			Change ₹ 0.00	å kk
Bank Bank	Total Due ₹ 10.50				linvoice
Summary Bank 10.50 📀	1	2	3	+10	
	4	5	6	+20	
	7	8	9	+50	
> Validate	+/-	0		-03	

# Screenshot 33: Van Point of Sale – Stock Update After Selling All Loaded Products

Once all the loaded products are sold, the stock will be updated in real time.

- After completing the sale of all loaded items, the product screen will show **blank** or **out of stock** because all the items have been sold.
- The stock levels will be updated immediately to reflect the changes in inventory.

This ensures accurate tracking of product availability and prevents overselling.



# Screenshot 34: Van Point of Sale – Closing the Session After Selling All Loaded Products

When all loaded products have been sold, there is no need to create an **Unload** transfer. You can simply close the session, and the stock will be automatically updated.

- Once all products are sold, click **Close Session**.
- The stock will be automatically updated without requiring an unload process.

This feature streamlines the process and ensures that the inventory is updated without the need for additional actions when all items are sold.



0000			Administrator 👻 🖻
		₹ 10.50	
Payment Successful			🕲 Your logo
	🕀 Print Receipt		My Company Served by Administrator
ik@gmail.com	Closing Session	Total 1 orders: ₹ 10.50	101 Test Product ₹ 1057 Units ₹ 10.50
	Payment Method Bank	Expected         Counted         Difference           ₹10.50         10.50         ¥         ₹0.00	TOTAL ₹ 10.50
	Closing note Add a closing note		Eank 10.50 CHANGE ₹0.00 Tax Amount Base Total SGST2.5% 0.25 10.00 10.25
	Close Session Discard	Daily Sale 🛓	CGST2.5% 0.25 10.00 10.25 0.50 10.00 10.50 Reward by Obto Over 2011-00-000 06/09/02/4 10.051



Screenshot 35: Van Point of Sale – Unload Transfer to Move Unsold Products

to Warehouse

- Go to the **Point of Sale** module in Odoo.
- Click on Van Stock Transfer Unload to initiate the transfer of unsold products back to the warehouse.

This process ensures that unsold inventory is returned to the warehouse and stock levels are updated accordingly.

III Point of Sale Dashboard C	Irders Products Van Stock 1	Transfer Unload Reporting	Configuration				🔍 🛛	A
Point of Sale			Q Search	•		1-	-3/3 < >	=
Shop		I	Test Shop	1	Test Shop1			I
New Session	Closing Balance	08/28/2024 ₹ 0.00	Continue Selling		Continue Selling	Closing	08/29/2024	
				A				A

#### Screenshot 36: Van point of sale - Create an unload transfer

- Create a **new unload transfer** to return unsold products to the warehouse.
- Select the **POS** associated with the van sales session.
  - Unsold products will be automatically updated based on the remaining quantity in the van.
- Click INITIATE TRANSFER to start the unloading process.



This step ensures that unsold products are efficiently transferred back to the

warehouse, and inventory is updated in real time.

Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reporting	Configuration	🧟 O 🔼
New Van Sales Stock Transfer UNLOAD/TRANS/020 �		1/1 < >
Initiate Transfer Cancel	Draft Waiting Loaded A	pproved Send message Log note Q 🗞 👌 Following
UNLOAD/TRANS/020		Today
Company My Company	Picking Type Unload	Administrator - now
Point of Sale Test Shop1 (Administrator)	Date 08/29/2024 13:58:54	A van.stock.transfer created
Supervisor Administrator	Can Approve	
	Can View 🛛	
	Can Cancel	
VAN DETAILS		
Van Audi/A1/BR092583		
Salesman kk		
Operations Other Informations		
Product	Demand	Done
Test Product	5.00	0.00 🚔
Add a line		

# Screenshot 37: Van Point of Sale – If logged in as Salesman

If you are logged in as a **salesman**, you will not have the ability to validate the transfer.

- As a salesman, you cannot validate the **unload transfer**.
- To validate the transfer, you need to contact your **supervisor**, who has the necessary permission to approve it.

This ensures that only authorized personnel (supervisors) can validate stock transfers, maintaining proper control over inventory movements.

New Van Sales Stock Transfer UNLOAD/TRANS/125 0	Transfers	1/1 < >
Cancel	Draft Walting Loaded Approved	Send message Log note Q. 🗞 👌 Following
Validate the Transfer(s) to approve this Van stock transfer UNLOAD/TRANS/125 Company My Company Point of Sale Test Shop (not used) Supervisor Administrator	Picking Type Unload Date 09/10/2024 12:57:46	Today           JP - now         Image: Control of the second se
Van         Audi/A3(8809           Salesman         3P           Operations         Other Informations           Product         Other	Validation Error You can not Validate the Transfer. Please contact to your Supervisior to Validate the Transfer Close	×
	10.00 0.00	

• Each **salesman** can only view their own **unload records**. They will not have access to the unload records of other salesmen.

This ensures data privacy and helps maintain accurate records specific to each salesperson.

Inventory Overview Operations Pr	roducts Reporting Configuration						# 🔍 O 🚺 🖁 v17_pos_ver
New Van Sales Stock Transfer O		Q Search		•			1-9/9 < >
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/A3/8R09	9L	Draft
09/05/2024 16:56:37	LOAD/TRANS/121	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	9L	Approved
09/05/2024 15:17:19	LOAD/TRANS/112	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	9L	Loaded
09/05/2024 13:48:14	LOAD/TRANS/111	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP 9L	Loaded
09/05/2024 13:47:09	LOAD/TRANS/110	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP 9L	Draft
09/05/2024 13:39:12	LOAD/TRANS/103	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	9L	Completed
09/05/2024 13:18:49	LOAD/TRANS/094	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	- PL	Completed
09/05/2024 12:31:59	UNLOAD/TRANS/093	Unload	Test Shop (not used)	Administrator	Audi/A3/BR09		Completed
08/28/2024 18:58:48	LOAD/TRANS/016	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	qL	Completed



#### Screenshot 38: Van Point of Sale – Validate Product Transfer

Only a **supervisor** has the authority to validate the product transfer.

- The **supervisor** can review the transfer details and click **Validate** to approve the transfer.
- Salesmen will not be able to validate the transfer.

This ensures that the product transfer is properly authorized and managed by a supervisor.

Boint of Sale Dashboard Orders Products Van Stock Transfer Unload Re	porting Configuration					🔍 🖸 🚺
New / UNLOAD/TRANS/020 / Transfers		Detailed Operations				1/1 < >
Validate Print Print Labels Cancel		Draft Waiti	ng Ready Done	Send message Log note	Activities	Q 🗞 ≙ <sup>1</sup> Following
☆ /STOCK_TRANS/024					Today	
Contact	Scheduled Date ?	08/29/2024 13:58:54		A Administrator - now Transfer created		
Operation Type My Company: VAN SALE UNLOAD	Source Document ?	e.g. PO0032				
Source Location Van						
Destination Location WH/Stock						
Operations Additional Info Note						
Product	Demand	Quantity	<del>,</del>			
Test Product	5.00	5.00 🖿	≡ 9			
Add a line						

#### Screenshot 39: Van Point of Sale – Approve Unload Transfer

Only a **supervisor** can approve the unload transfer to complete the process.

- The **supervisor** must review the unload transfer and click **Approve** to finalize the transfer of unsold products back to the warehouse.
- Salesmen do not have permission to approve the transfer.

This ensures that the unloading process is overseen and authorized by a supervisor.

Point of Sale Dashboard Orders Products Van Stock Transfer Unload Report	ting Configuration	Van Sale	es POS Plugin	for Odoc	) v18.0 €° ⊙ ∧
New Van Sales Stock Transfer UNLOAD/TRANS/020 🚭		→ Transfers			1/1 < >
Approve Reject Cancel		Draft Waiting Loaded Approved	Send message Log note		Q % ≙ <sup>1</sup> Following
Validate the Transfer(s) to approve this Van stock transfer         UNLOAD/TRANS/020         Company       My Company         Point of Sale       Test Shop1 (Administrator)         Supervisor       Administrator         VAN DETAILS         Van       Audg/A1/8R092583         Salesman       kk         Operations       Other Informations	Picking TypeUnloadDate08/29/2024 13:58:54Can ApproveICan ViewICan CancelI		<ul> <li>Administrator - 45 seconds ago</li> <li>Dratt → Loaded (Statua)</li> <li>Administrator - 2 minutes ago</li> <li>van.stock.transfer created</li> </ul>	Today	
Product	Demand	Done			
Test Product	5.00	5.00 🗑			
Add a line					

#### Screenshot 40: Van Point of Sale – Close Session

- Click 'Close' in the POS terminal to begin the session closure process.
- Rectify any **cash differences** that may have occurred during the sales session.
- After resolving discrepancies, click **Close Session** to finalize the session and update the inventory.

This process ensures that all sales transactions are completed, cash differences are addressed, and the session is properly closed.

pits °	odoo	Van Sales I	POS Plug	in for (	Odoo v18.0 S Mitchell Admin ≡
Paymen 2 2.10 Print e.g. john.doe@mail.com	Closing Register Cash Opening Cash in /Out Cash in /Out Difference Card Difference Customer Account Counted Difference Cash Count 0 Cash Count 2.10 Cosing note Add a dosing note_	1 orders: 12.10 ₹ 0.00 + 0.00 7 0.00 ₹ 2.10 ₹ 2.10 ₹ 2.10 ₹ 2.10 ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 1.05 / Unit ₹ 1.05	Your logo     Kerissission     Sector     Sector	₹2.10 ₹0.05 ₹0.05 ₹2.10 ₹2.10 ₹2.10 ₹2.10	
Nev	Close Register Discard Cash In/Out	Daily Sale 📥			

# 4. Brief Description

This module introduces new features to the Point-of-Sale system tailored for van sales operations. It ensures that each van's stock is tracked and recorded, with two main operations involved: **loading** and **unloading**. Both operations are recorded within the system for accurate inventory management.

#### User Groups

The module creates two primary user groups:

- Manager: Full access to all modules and settings.
- Salesman: Restricted access, limited to specific tasks related to van sales.

#### Step-by-Step Implementation Guide

- Install the Van Point of Sale Module: Begin by installing the Van Point of Sale module in your Odoo system.
- Activate the Settings in the Inventory Module: Go to the Inventory module and activate the necessary settings for van stock management.



# 3. Set User Groups for Corresponding Users:

Assign the appropriate user groups (Manager or Salesman) to your users, ensuring correct access control.

# 4. Add Locations in the Location Settings:

In the Inventory module, configure the locations for van stock, specifying warehouse and van locations.

#### 5. Add Operation Types in the Inventory Module:

Configure operation types (such as VAN\_SALE\_LOAD, VAN\_SALE\_UNLOAD) within the Inventory module for managing stock transfers.

# 6. Initiate the Van Stock Transfer Loading Process:

Begin the process of loading products into the van by selecting the VAN\_SALE\_LOAD operation type.

#### 7. Validate the Load Before Transfer:

Ensure that the load is validated before being transferred. This step ensures that the stock is properly allocated to the van.

#### 8. Manager Grants Access to Transfer the Load:

The manager must grant the necessary permissions to the appropriate users (salesmen) to initiate the transfer.

#### 9. Create a New Point of Sale:

In the POS module, create a new POS instance for van sales.

#### 10. Add Operation Types to the New POS:

While creating the new POS, ensure that the relevant operation types (e.g., VAN\_SALE, VAN\_SALE\_LOAD, VAN\_SALE\_UNLOAD) are added.

#### 11. Close the Sale Session After the Sale:

After completing the sales, close the POS session to finalize the transaction and update the inventory.

#### 12. Ensure Sales Do Not Exceed Available Quantity:

The system will prevent selling more than the available stock in the van during the session.



# 3. Real-Time Stock Update in Inventory:

Ensure that stock levels are updated in real time for accurate tracking of inventory during and after the sales session.

#### 14. Unload Products If Not Sold:

If there are any unsold products, initiate the unloading process to return the items to the warehouse before closing the session.

# 5. Technical Requirements / Compatible With:

- Technical Requirements: Odoo point of sale, Inventory, Fleet Module.
- Compatible with: Odoo 18.0.

# 6. Changes Log / Release Notes.

- Version 1.0.0: December 2024
  - o Initial release.

# 7. Support

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