

User Manual

Van Sales POS Plugin for Odoo v17.0



Table of Contents

1.	Introduction	3
2.	Features	3
3.	Screenshots	4
4.	Brief Description	34
5.	Technical Requirements / Compatible With:	35
	Changes Log / Release Notes	
7.	Support	36



1. Introduction

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

2. Features

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

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



3. Screenshots

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

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

Inventory Overvie	ew Operations Products Reporting Configuration		in 🔍 🖉 🖉 🔥 Administrator in 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.
Save Discard Setti	ings	Q Search	
General Settings Inventory Invoicing Fleet	Application ID → Generate an Access Key □ reCAPTCHA Protect your forms from spam and abuse.	Cloudflare Turnstile Protect your forms with CF Turnstile.	
IN Point of Sale	Performance		
	Profiling enabled until Enable the profiling tool. Profiling may impact performanc being active.	e while	
	Developer Tools		
	Activate the developer mode (with assets) Activate the developer mode (with tests assets) Deactivate the developer mode Load demo data Download XSD files (XML validation)		
	About		
	Gér IT ON Google Play Download on App Sto Odoo 17.0 (Community Edition) Copyright © 2004 Odoo S.A. (SNU LGPL Licensed	the re	



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

Settings General Settings Users & Companies Translations Technical		髨 🕑 My Company (San Francisco) 🦉
New Users supervisor 🏠	Groups IB Access Rights E Record Rules	6/7 < >
	Bank	
INVENTORY	HUMAN RESOURCES	
Inventory ? Administrator	Fleet Administrator	
ADMINISTRATION	OTHER	
Administration	Van Sales Supervisor Dashboard ? Salesman Supervisor	
A warning can be set on a partner (Account)	A warning can be set on a partner (Stock)	
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	
Manage Different Stock Owners	Manage Lots / Serial Numbers	
Manage Multiple Stock Locations	Manage Multiple Units of Measure	
Manage Multiple Warehouses	Manage Packages	

• If you want to give supervisor as administration access.

I Settings General Settings Users & Companies	ranslations Technical			🔍 C' 🔥
New Users O qL		Groups Access Rights E	Record Rules 78	2/5 < >
O Portal O Public				•
SALES		ACCOUNTING		
Sales ⁷ Administrator		Involcing 7 Billing Administrator		
Point of Sale ⁷ Administrator		Bank		
INVENTORY		HUMAN RESOURCES		
Inventory ⁷ 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		
		Allow the cash rounding management		
Analytic Accounting		Basic Pricelists		
Delivery Address		Discount on lines		
		Display Serial & Lot Number on Invoices		
		Mail Template Editor		
Manage Different Stock Owners		Manane Lots / Serial Numbers		*

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

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

Exercise General Settings	Users & Companies Translations Technical	🔅 🧔 5 🛛 4 My Company (San Francisco) 🛛 🕼 Mitchell Admin (vansale16_regression
Settings		Search Q
SAVE DISCARD		
🔯 General Settings	Get a full traceability from vendors to customers Print GS1 Barcodes for Lots & Serial Numbers	Set expiration dates on lots & serial numbers
inventory	Use GS1 nomenclature datamatrix whenever barcodes are printed for lots and serial numbers.	
Invoicing	Display Lots & Serial Numbers on Delivery Slips	Consignment 🖗
🕿 Fleet	Lots & Serial numbers will appear on the delivery slip	Set owner on stored products
Point of Sale Valua	tion	
0	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.
Warel	house	
	Storage Locations □ Track product location in your warehouse → Locations → Putaway Rules Storage Categories Categorize your locations for smarter putaway rules	Multi-Step Routes

pits

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

- Go to *Inventory*.
- Locations.

Inventory Overview Op	perations Products Location	s Reporting Configuration				≪ ⁶ € ¹² №	ly Company (San Francisco) 🛛 😽
Inventory Overview		Q þearch			•		1-7/7 < >
Receipts 4 To Process 4		ternal Transfers) To Process	I	Delivery Orders 4 To Process	1 Waiting 5 Late	PoS Orders 0 To Process	:
VAN SALE 0 To Process		AN SALE LOAD) To Process	1	VAN SALE UNLOAD 0 To Process	I		

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

Inventory Overview Operations Products Locations Reporting Configuration		🕵 🤁 🖓 My Company (San Francisco)
New Locations &	•	1-14/14 < >
Location	Location Type	Company
Test Location	Internal Location	My Company (San Francisco)
Van Sale Location	Internal Location	My Company (San Francisco)
Van Sale Location	Internal Location	My Company (San Francisco)
WH/Input/Order Processing	Internal Location	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone	Internal Location	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone/Gate B	Internal Location	My Company (San Francisco)
WH/Stock	Internal Location	My Company (San Francisco)
WH/Stock/Moon Location	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 1	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 2	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 2/Small Refrigerator	Internal Location	My Company (San Francisco)
WH/Stock/Sun Shop Location	Internal Location	My Company (San Francisco)
VLocation	Internal Location	My Company (San Francisco)

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

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

Inventory Overview Operations Products Locations Reporting Configuration	😒 🗗 My Company (San Francisco)
New A A C	X Putaway Rules 🗞 Current Stock
Location Name e.g. Spare Stock Parent Location ' e.g. Physical Locations	
ADDITIONAL INFORMATION	CYCLIC COUNTING
Location Type ? Internal Location Company ? My Company (San Francisco) Is Van Location	Inventory Frequency 0 (Days) ⁷ Last Effective Inventory ⁷ Next Expected Inventory ⁷
Removal Strategy ⁷ External note	

Screenshot 6: Van point of sale - operation types:

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

ventory Overview				Settings Warehouse Management			-			1-7/7 < >
Receipts 4 To Process	4 Late	I	Internal Transfe 0 To Process	Warehouse Wanagement Warehouses Routes Rules Operations Types Putaway Rules	1	Delivery Orders 4 To Process	1 Waiting 5 Late	I	PoS Orders 0 To Process	I
/AN SALE 0 To Process		I	VAN SALE LOAI 0 To Process	Products Product Categories Attributes Reordering Rules	i	VAN SALE UNLOAD 0 To Process		I		

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 Operation:				🕵 6 🔁 My Company (San Francisco)
ew Operations Types YourCompany: VAN SALE 🏟				1/1 <
Operation Type				
VAN SALE				
				Da
General Hardware				
Type of Operation Delivery		Company	My Company (San Francisco)	
Sequence Prefix VS		Returns Type		
Reservation Method ? O At Confirm	ation	Default returns		
 Manually 		location ⁷		
 Before sch 	eduled date	Create Backorder ?	Ask	
OTS/SERIAL NUMBERS		LOCATIONS		
Create New 7		Default Source	Van	
Jse Existing ones ?		Location ?		
		Default Destination	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 P	Contractor Contractions Interportin	ig comparation			髨 🕑 My Company (San Francisco)
ew Operations Types YourCompany: VAN SALE LOAD 🎄					6/7 <
Operation Type VAN SALE LOAD General Hardware					
ype of Operation Internal Transfer			Company	My Company (San Francisco)	
equence Prefix VSL			Returns Type		
Reservation Method ? O At Confirmation			Default returns		
O Manually		R	location ?		
 Before schedule 	d date		Create Backorder ?	Ask	
OTS/SERIAL NUMBERS			LOCATIONS		
create New ?			Default Source	WH/Stock	
Jse Existing ones ? 🛛 🗹			Location ?		
			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.

Inventory Overvie		ocations Reporting	Configuration			喿 6 🕑 2 My Company (San Francisco) 🦉
lew Operations Types YourCompany: VA	IN SALE UNLOAD 🏚					7/7 < >
Operation Type VAN SALE U General Hardwar						
Type of Operation	Internal Transfer			Company	My Company (San Francisco)	
Sequence Prefix	VSU			Returns Type		
Reservation Method ?	• At Confirmation			Default returns		
	 Manually 			location ⁷		
	 Before scheduled date 			Create Backorder ?	Ask	
LOTS/SERIAL NUMBERS				LOCATIONS		
Create New ?				Default Source Location [?]	Van	
Use Existing ones			La	Default Destination Location ⁷	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.

III Fleet Fleet Reporting Configuration			¥ 🧟 O 🚺 Administrator ∎ v17_pos_van
New Vehicles //No Plate O O	Drivers History		
	New Request To Order Registered Downgraded	Send message Log note Activities	Q 🗞 🖉 Follow
Model ? e.g. Model S	· .	Today	
License Plate [?] e.g. PAE 326		A Creating a new record	
Tags ²			
DRIVER	VEHICLE		
Driver ²	Category ⁷		
Future Driver ?	Order Date ?		
Assignment Date ?	Chassis Number ?		
	Fleet Manager ?		
	Location ?		
Tax Info Model Note			
FISCALITY	CONTRACT		
Horsepower Taxation $? = ₹ 0.00$	First Contract Date ? 08/28/2024		
	Catalog Value (VAT ₹ 0.00 Incl.) ?		
	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.

Point of Sale Da	shboard Orders Products Van Stock Transfer Unload Reporting Co	nfiguration	🔍 🛛 🔥
Save Discard Sett	ings	Q Search	
General Settings	Point of Sale Shop (not used)		×
 Invoicing 	Restaurant Mode		
Fleet	Is a Bar/Restaurant		
	Payment		
	Payment Methods Payment methods available Cash X Bank 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 validate order 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 Interface		
	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	v

Screenshot 12: Enter new POS details:

业 Odoo	×
Point of Sale? e.g. NYC Shop	
Is a Bar/Restaurant [?]	
SAVE DISCARD	

Screenshot 13: Edit new POS:

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

Point of Sale			Q Search	•	1-2/2 < > ▮
Shop		I	Test Shop	i	
New Session	Closing Balance	08/28/2024 ₹ 0.00	New Session	View Reporting Orders Orders Sessions	

Screenshot 14: Configure new POS to Van Sale POS:

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

Point of Sale Dashboard Orde	rs Products Van Stock Transfer Unload Reporting Configuration	🕵 🕑 My Company (San Francisco) 📓
Point of Sale	Odoo	× 1-14/14 < > 🔳
MMM!	Point of Sale ⁷ VAN 3	· · · · ·
Continue Selling		12/16/2024
	Multi Employees per Session ? Allow to log and switch between selected Employees Connect device to your PoS without an IoT Box	5
NEW VAN - SHOP2	Is VAN POS Supervisor New VAN Supen Operation Type Operation type used to record product pickings	I
Continue Selling	Van Opel/Corsa/1-SY YourCompany: VAN SAL Salesman Van Sale Operator Van Sale Operator	12/17/2024
Test VAN Sales	Operation Type(Load) Operation Type(Unload) Operation type used to record product load pickings Operation type used to record product unload pickings	1
New Session	YourCompany: VAN SAI	12/17/2024
	Stock Location IoT Box Stock Location used for Loading and Unloading Connect devices using an IoT Box	
VAN_3	VAN_33 More settings: Configurations > Settings	1
New Session	Save Discard	12/17/2024

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



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

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

nventory Overview	Transfers Receipts	Q Search			-			1-7/7 <
Receipts	Deliveries Internal	Internal Transfers	I	Delivery Orders	1 Waiting	I	PoS Orders	
4 To Process	Adjustments Physical Inventory Scrap	0 To Process		4 To Process	5 Late		0 To Process	
VAN SALE	Procurement Replenishment	VAN SALE LOAD	1	VAN SALE UNLOAD		I		
0 To Process	Van Stock Transfer Load	0 To Process		0 To Process				

pits

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

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

Inventory Overview Operations Products Locations Reporting Configura	tion	2 6	@ ¹²	My Company (San Franci	sco) 🭯
New Van Sales Stock Transfer					
Initiate Transfer Cancel	Draft Waiting Loaded Approved Send message Log note			Q 🗞 8°	Follow
/ Company My Company (San Francisco) Picking Type Point of Sale Test Shop (not used) Date Supervisor Mitchell Admin	Load 02/24/2025 11:52:45 Mitchell Admin - 10 mi Creating a new record		Today 30		
VAN DETAILS Van Mercedes/Class A/1-MER-001 Salesman salesman Operations Other Informations Product	Demand Done	ş			
[FURN_0002] Desk Pad	1.00 0.00 🖻				
Add a line					

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

• While initiating the transfer.

Inventory Overview Operations Products Locations	Reporting Configuration	🕵 6 🚺 My Company (San Francisco) 👹
New Van Sales Stock Transfer LOAD/TRANS/033 🏚		1/1 < >
Initiate Transfer Cancel	Draft Waiting Loaded Approved Send message	e Log note Q 🗞 👌 Following
LOAD/TRANS/033		Today
Company My Company (San Francisco)	Picking Type Load	Admin - now
Point of Sale Test Shop (not used)	Tod	k Transfer created
Supervisor Mitchell Admin	Validation Error ×	
VAN DETAILS Van Mercedes/Class A/1-MER-001 Salesman salesman	Insufficient stock for product Desk Pad. Please adjust the quantities or restock the product before creating the transfer.	
Operations Other Informations		
Product	b Demand Done	
[FURN_0002] Desk Pad	1.00 0.00 💼	
Add a line		



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

Inventory Overview Operations Products Locations Reporting Configuration	髨 🖸 12 My Company (San Francisco) 🦉
Van Sales Stock Transfer LOAD/TRANS/033 🏘	$\rightleftharpoons_1^{\text{Transfers}}$
Approve Reject Cancel Draft	Waiting Loaded Approved Send message Log note Q & &' Following
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/033 Company My Company (San Francisco) Picking Type Load Point of Sale Test Shop (not used) Date 02/24/2025 11:5 Supervisor Mitchell Admin Van Details Van Mercedes/Class A/1-MER-001 Salesman salesman Salesman Salesman Operations Other Informations Van Mercedes/Class Van Mercedes/Class	2:45 Today Witchell Admin - 4 minutes ago Draft → Loaded (Status) Witchell Admin - 37 minutes ago Van Stock Transfer created
Product	Demand Done
[F-COM12] Conference Chair (Steel)	1.00 0.00
	·

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

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

Inventory Overview Operations Products Locations		
New Van Sales Stock Transfer LOAD/TRANS/033	$\rightleftharpoons_1^{\text{Transfers}}$	1/24 🔨 🗲
Cancel	Draft Waiting Loaded App	vroved Send message Log note Q 🗞 👌 Follow
Validate the Transfer(s) to approve this Van stock LOAD/TRANS/033 Company My Company (San Francisco) Point of Sale Test Shop (not used) Supervisor Mitchell Admin	transfer Picking Type Load Validation Error You can not Validate the Transfer. Please contact to your Supervisior to Cose	Today Mitchell Admin - 12 minutes ago Draft → Loaded (Status) vell Admin - 45 minutes ago vell Admin - 45 minutes ago
Van Mercedes/Class A/1-MER-001 Salesman salesman Operations Other Informations		
Product	Demand	Done
[E-CDM12] Conference Chair (Steel)	1.00	0.00



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

• Each salesman can see only his/her Records.

Screenshot 21: Van point of sale – Validate transfer:

• Only Supervisor can validate the transfer.

Inventory Overview Operations Products Locations Reporting Configuration	髨 🥑 🛛 My Company (San Francisco) 👹
New / LOAD/TRANS/033 / Transfers /STOCK_TRANS/049 🏟	Detailed Operations 1/1 < >
Validate Print Print Labels Cancel	Draft Waiting Ready Done Send message Log note Activities Q 🗞 👌 Following
☆ /STOCK_TRANS/049	Today
Contact Scheduled Date	02/24/2025 11:52:45 Mitchell Admin - 16 minutes ago Transfer created
Operation Type YourCompany: VAN SALE LOAD Source Documen	
Source Location WH/Stock	
Destination Location dev test	ß
Operations Additional Info Note	
Product Demar	d Quantity 🐳
[E-COM12] Conference Chair (Steel) 1.0	0 1.00 👞 🗮 💼
Add a line	
Note: Adding new products or removing existing products from the Operations tab will im	art the load/unload onerations in the Van Sales
POS.	

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

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

Inventory Overview Operations Products Locations		🕵 6 🕑 2 My Company (San Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/033 🏚	→ Transfers 1	1/1 < >
Approve Reject Cancel	Draft Waiting Loaded Approved	É Send message Log note Q ⊗ A ¹ Following
Validate the Transfer(s) to approve this Van stock LOAD/TRANS/033 Company My Company (San Francisco) Point of Sale Test Shop (not used) Supervisor Mitchell Admin	Transfer	Today Today Taft → Loaded (Status) × iel Admin - 1 hour ago todk Transfer created
Van Mercedes/Class A/1-MER-001 Salesman salesman Operations Other Informations	Cose	
Product	Demand Done	
[E-CDM12] Conference Chair (Steel)	1.00 1.00	





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

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

Inventory Overview Operations Products Locations Reporting Co	nfiguration	喿 6 🥑 Company (San Francisco) 🦉
New Van Sales Stock Transfer LOAD//TRANS/033 🏠	\rightleftharpoons Transfers	1/1 < >
Approve Reject Cancel	Draft Waiting Loaded Approved	Send message Log note Q 🗞 👌 Following
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/033 Company My Company (San Francisco) Pickin Point of Sale Test Shop (not used) Date Supervisor Mitchell Admin Test Shop (not used) Date	g Type Load 02/24/2025 11:52:45	Image: Today Image: Mitchell Admin - 4 minutes ago Image: Todaded (Status) Image: Todaded (Status)
Van Mercedes/Class A/1-MER-001 Salesman salesman Operations Other Informations		
Product	Demand Done	
[E-COM12] Conference Chair (Steel)	1.00 0.00	

Screenshot 24: Create Return:

• Click on return button.

lew /STOCK_TRANS/049		E Detailed Operations		1/1 < >
rint Labels Print Return		Draft Waiting Ready Done	Send message Log note Activities	Q 🕲 🔒 1 Followi
Contact Operation Type VourCompany: VAN SALE LOAD Source Location WH/Stock Destination Location dev test Operations Additional Info Note		/24/2025 11:52:45 /24/2025 13:55:22	Today Witchell Admin - 5 minutes ago • Ready → Done (Status) Witchell Admin - 1 hour ago Transfer created	
Product	Demand	Quantity 📫		
[E-COM12] Conference Chair (Steel)	1.00	1.00 🖿 🔳		
Note: Adding new products or removing existing products from POS.	the Operations tab will impact the la	oad/unload operations in the Van Sales		

Screenshot 25: Validate the Return:

• Stock will be moved to warehouse.

Inventory Overview Operations Products Locations Re	porting Configuration		🕵 🤨 🥵 My Company (San Francisco)
New / Transfers / /STOCK_TRANS/051 /STOCK_TRANS/052 🌣		E Detailed Operations	1/1 < >
Validate Print Print Labels Cancel		Draft Waiting Ready D	Done Send message Log note Activities Q 🗞 👌 Following
☆ /STOCK_TRANS/052			Today
Contact	Scheduled Date ? 02/	24/2025 14:04:11	Mitchell Admin - now This transfer has been created from: /STOCK TRANS/051
Source Location dev test	Source Document ? Ret	urn of /STOCK_TRANS/051	
Destination Location WH/Stock			Transfer created
Operations Additional Info Note			
Product	Demand	Quantity	Ŧ
[E-COM12] Conference Chair (Steel)	1.00	1.00 🖿 📰	ŵ
Add a line			
Note: Adding new products or removing existing products from the	e Operations tab will impact the loa	d/unload operations in the Van Sales POS.	DS.

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

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

Inventory Overview Operations Products Locations Reporting	g Configuration	矣 6 🕑 2 My Company (San Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/036 🏘	→ Transfers 1	34/34 < >
Approve Reject Cancel	Draft Waiting Loaded Approved	Send message Log note Q % &1 Following
	Picking Type Load Date 02/24/2025 14:06:08	Today Image: Mitchell Admin - now Image: Mitchell Admin - now Witchell Admin - now Van Stock Transfer created
Van Mercedes/Class A/1-MER-001 Salesman salesman	Q.	
Operations Other Informations		
Product [E-COM12] Conference Chair (Steel)	Demand Done 1.00 0.00	
E-comits contraince chair (steet)	1.00 0.00	



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

Inventory Overview Operations Products Locations		髨 6 🥵 My Company (San Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/038		1/1 < >
Initiate Transfer Cancel	Draft Waiting Loaded Approved Send message Log no	te Q 🗞 🖯 ¹ Following
LOAD/TRANS/038		Today
Company My Company (San Francisco)	Picking Type Load Mitchell Admin - nor	w
Point of Sale Test Shop (not used)	Date 02/24/2025 14:08:51	eated
Supervisor Mitchell Admin	Validation Error ×	
Van DETAILS Van Mercedes/Class A/1-MER-001 Salesman salesman	LOAD/TRANS/036 is in approve state. Complete the same and approve the next transfer.	
Operations Other Informations		
Product	Demand Done	
[E-COM12] Conference Chair (Steel)	1.00 0.00 💼	
Add a line		

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

Point of Sale Dashboard Orde	rs Products Van Stock 1	Transfer Unload Reporting	Configuration			¥ 🔍 ² O A Administrator ∎ v17_pos_van
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		New Session	
				A		

pits

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

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

odoo						🔥 Administrator 🛛 😤 🚍
		dding prod	ucts		Tet Product T. 1.6	Sarch products
'O Ref	und		, Customer	Note		
Customer	1	2	3	Qty		
	4	5	6	% Disc		
> Payment	7	8	9	Price		
	+/-	0		67		



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

odoo					S	Aitchell Admin 🗢 😑
Conference Chair 0.00 Units x ₹ 33	(Steel) .00 / Units			₹ 0.00	# \$7 59	Q Search products
			Tota	l: ₹ 0.00	Chairs Desks Misc Conference Validation Error Negative or zero quantities are not supported. Please enter a valid quantity. Cok	
"D Re	fund		Customer	Note		
Customer	1	2	3	Qty		
	4	5	6	% Disc		
> Payment	7	8	9	Price		
	+/-	0				

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

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



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

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

odoo							\Lambda Administrator 👳 🚍		
« Back					Payment	nent			
Payment method			Remaining ₹ 0.00			Change ₹ 0.00	≜ kk		
Bank			Total Due ₹ 10.50				Invoice		
Summary									
Bank	10.50	0	1	2	3	+10			
			4	5	6	+20			
			7	8	9	+50			
> Validate			+/-	0		02			

pits

Screenshot 33: For real time stock update:

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

Point of Sale Das	shboard Orders Products Van Stock Transfer Un	load Reporting Configuration			🔍 Ø 🚺
Point of Sale		Settings Payment Methods	•		1-4/4 < >
Shop		Coins/Bills Point of Sales Products	1	Test Shop1	1
New Session	Closing 08/ Balance र 0	28/2024 PoS Product Categories .00 Taxes		Continue Setling Closing	09/02/2024
M SHOP New Session	Closing 08/	1 30/2024			
	shboard Orders Products Van Stock Transfer Un				1
Save Discard Setti		Reporting Configuration			■ 0 M
C General Settings	Vantiv (US & Canada) Accept payments with a Vantiv payment t	Six Ø	ents with a Six payment terminal		
Sales Inventory Invoicing	PayTM Accept payments with a PayTM payment				
Fleet	Connected Devices				
Point of Sale	Connect device to your PoS without an lo	T Box Customer Di	<pre>splay ut to customers through a second display</pre>		
	Connect devices using an IoT Box	Preparation I Print orders a	Printers It the kitchen, at the bar, etc.		
	Preparation Display Display orders on the preparation display	Interprise			
	Inventory				
		Allow Ship Li	ater		
	Operation Type Used to record product pickings. Product default source location.	s are consumed from its Sell products	and deliver them later.		
	Used to record product pickings. Product	s are consumed from its Sell products			
	Used to record product pickings. Product default source location.	cards. etc. At the see	inagement Dites in stock		

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

odoo									🐻 Mitchell Admin 🗇 🗏
					ñ	Chairs	Desks	Misc	Q. Search products
									There are no products in this category.
		The semp	atv						
	THIS O	idei is ein	Jy						
D Ret	fund		Customer	Note					
Customer	1	2	3	Qty					
	4	5	6	% Disc					
> Payment	7	8	9	Price					
	+/-	٥		03					



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

odoo		A Admi	nistrator	
	₹ 10.50		Orders 🚺 Hide Produ	uct Images
Payment Successful	2	N Varue	Hide Categ Backend	gory Images
	⊖ Print Receipt	Served by Administrat	Close Sessi tor	ion
kk@gmail.com	4	101		
	Test Product 10.00 Units x	₹ 1.06 / Units TOTAL		₹ 10.50
	Bank			10.50
		0.25 0.25	Base 10.00 10.00 10.00	₹ 0.00 Total 10.25 10.25 10.50
		Powered by Odoo Order 00011-001-000 08/29/2024 13:53:51	01	
	> New Order			

odoo			\Lambda Administrator 🗢 🚍
		₹ 10.50	
Payment Successful	⊖ Print Receipt		Company My Company Served by Administrator
kk@gmal.com	Closing Session Payment Method Bank	Total 1 orders: ₹ 10.50 Espected Counted Difference ₹ 10.50 1050 ¥ ₹ 0.00	101 Test Product ₹ 1.05 / Units 10.00 Units x ₹ 1.05 / Units TOTAL ₹ 10.50
	Closing note		10/AL € 10.50 Bank 10.50 CHANGE ₹ 0.00 Tax Amount Base Total SSGT2.5% 0.25 10.00 10.25
	Close Session Discard	Daily Sale 🛳	GGST2.5% 0.25 10.00 10.25 0.50 10.00 10.50 Potentia by Odace Oder (2001-021-0201 04(2782024-1135551
	> New Order		

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

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

Point of Sale Dashboard	Orders Products Van Stod	k Transfer Unload Reporting					🔍 O 🔼
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		Continue Selling	Closing	08/29/2024
				A			A

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

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

Point of Sale Dashboard Orders Products Van Stock Transfer Unload	Reporting Configuration					🔍 🛛 🔥
New Van Sales Stock Transfer UNLOAD/TRANS/020 🏟						1/1 < >
Initiate Transfer Cancel		Draft Waiting	Loaded Approved	Send message Log note		Q ♥ A ¹ Following
UNLOAD/TRANS/020					Today	
Company My Company	Picking Type Unload			Administrator - now	Today	
Point of Sale Test Shop1 (Administrator)	Date 08/29/202	13:58:54		A van.stock.transfer created		
Supervisor Administrator	Can Approve					
	Can View 🛛					
	Can Cancel 🛛					
VAN DETAILS						
Van Audi/A1/8R092583						
Salesman kk						
Operations Other Informations						
Product	Demand		Done			
Test Product	5.00		0.00 🗎			
Add a line						

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

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

Here Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reporting	Configuration		💐 O 🚺
New Van Sales Stock Transfer UNLOAD/TRANS/125	Transfers		1/1 <>
Cancel	Draft Waiting 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)	Picking Type Unload Date 09/10/2024 12:57:46	J ^{IP - now} ■ Draft → Loaded (Stotus) J ^{IP - now} unstock transfer created	Today
Supervisor Administrator VAN DETAILS Van Aud(VA3/880) Salesman (P	Validation Error	<	
Operations Other Informations Product	Сюхе		
738	10.00 0.00		

• Each salesman can see only his/her unload Records.

Van Sales Stock Transfer	0	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/BR09	JP	Draft
09/05/2024 16:56:37	LOAD/TRANS/121	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Approved
09/05/2024 15:17:19	LOAD/TRANS/112	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	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/BR09	JP	Draft
09/05/2024 13:39:12	LOAD/TRANS/103	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
09/05/2024 13:18:49	LOAD/TRANS/094	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
09/05/2024 12:31:59	UNLOAD/TRANS/093	Unload	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed
08/28/2024 18:58:48	LOAD/TRANS/016	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed

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

• Only Supervisor can Validate the transfer.

Boint of Sale Dashboard Orders Products Van Stock Transfer Unload	Reporting Configuration				🔍 🕗 🔼
New / UNLOAD/TRANS/020 / Transfers		E Detailed Operations			1/1 < >
Validate Print Print Labels Cancel		Draft Wait	ng Ready Done	Send message Log note Activities	Q 🗞 👌 Following
☆ /STOCK_TRANS/024					Today
Contact	Scheduled Date 7	08/29/2024 13:58:54		A Administrator - now Transfer created	
Operation Type My Company: VAN SALE UNLOAD	Source Document ?				
Source Location Van					
Destination Location WH/Stock					
Operations Additional Info Note					
Product	Demand	Quantity			
Test Product	5.00	5.00	•		
Add a line					

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

• Only Supervisor can Approve the transfer.

Point of Sale Dashboard Orders Products Van Stock Transfe	r Unload Reporting Configuration	髨 6 🕑 12 My Company (San Francisco) 🦉
Van Sales Stock Transfer UNLOAD/TRANS/039 🏟	\rightleftharpoons 1 Transfers	1/1 < >
Approve	Draft Waiting Loaded A	Approved Î Send message Log note Q 🗞 👌 Following
Validate the Transfer(s) to approve this Van stock transf UNLOAD/TRANS/039 Company My Company (San Francisco) Point of Sale Test Shop (Mitchell Admin) Supervisor Mitchell Admin	er Picking Type Unload Date 02/24/2025 14:15:57	Mitchell Admin - now • Draft Loaded (Status) Image: Status St
Van Mercedes/Class A/1-MER-001 Salesman salesman Operations Other Informations		
Product	Demand	Done
[E-COM12] Conference Chair (Steel)	1.00	1.00
		-

pits

Screenshot 41: Van point of sale – Close session:

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

odoo					A	Administrator	* ≡
		₹ 5.26					
Payment Successful					້ໝ You	logo	
⊖ Print Receipt						pary ninistrator 1	
	Closing Session Payment Method Bank	Expected Counted ₹5.26 5.26 >	Total 1 orders: ₹ 5.26 Difference € ₹ 0.00	Test 5.0	Product 0 Units x ₹ 1.06 / Units TOTAL		₹ 5.26 ₹ 5.26
	Closing note Add a closing note				CHANGE Tax Amount	Base	5.26 0.00 ₹ 0.00 Total
	Close Session Discard		Daily Sale 🛓	SGST: CGST:		5.00 5.00 5.00	5.13 5.13 5.26
					Order 00012- 08/29/2024		

pits

4. Brief Description

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

Initial step-by-step description

- Step 1 Install the module Van Point of Sale.
- Step 2 Goto inventory module and activate the settings option.
- Step 3 Set user groups for the corresponding users.
- Step 4 Add the location in the location setting.
- Step 5 Add the operation types in module inventory.
- Step 6 Then initiate the van stock transfer loading process.
- Step 7 The load should be validated before it is approved to transfer state.
- Step 8 The supervisor should give them access to transfer the load.
- Step 9 Then create a new point sale.
- Step 10 Ensure Operation Types are added in POS Config.
- Step 11 After sale we can close the sale session in the POS module.

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

5. Technical Requirements / Compatible With:

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

6. Changes Log / Release Notes

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



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

7. Support

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