

User Manual

Van Sales POS Plugin for Odoo v16.0



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1. Introduction

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

2. Features

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

Settings Genera	al Settings	Users & Companies
Settings		Search
SAVE DISCARD	_	
🤨 General Settings		OAuth Authentication LDAP Authentication @ Use external accounts to log in (Google, Facebook, etc.) Use LDAP credentials to log in
S Inventory	Ø	Unsplash Image Library 🚱 🔅 Geo Localization Find free high-resolution images from Unsplash GeoLocalize your partners
Fleet		Access Key
Point of Sale		Application ID
		reCAPTCHA Protect your forms from spam and abuse.
	Devel	loper Tools
		Activate the developer mode Activate the developer mode (with assets) Activate the developer mode (with tests assets)
	Abou	ıt
		GET IT ON Google Play Odoo 16.0 (Community Edition) Copyright © 2004 <u>Odoo S.A. GNU LGPL Licensed</u>



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

III Settings General Settings Users & Companies Translations Technical	🕸 🙈 4 🙋 3 My Company (San Francisco) 🛛 🚯 Mitchell Admin (vansale16_testing)
Settings / Users / Mitchell Admin Anowed companies UN Company x / My Company (Lincago) x / My Company (Lan Hancisco) x / Default Company ¹ My Company (San Francisco)	Print ØAction 2/2 ✓ New
USER TYPE User types ? O Internal User O Portal O Public	
SALES Point of Sale ⁷ Administrator	ACCOUNTING
INVENTORY Inventory Administrator ADMINISTRATION	HUMAN RESOURCES Fleet ⁷ Administrator OTHER
Administration ⁷ Settings TECHNICAL A warning can be set on a partner (Account) ⁷	Van Sales ? Supervisor
A warning Can be set on a partner (account) Access to Private Addresses ?	Access to export feature ?

• If you want to give supervisor as administration access.

rs/SU 🌢 🕤				
				⊖Print ØAction 4/4 < > New
	Access Rights Preferences Account Sec	urity		
	User types ? O Internal User Portal Public			
	SALES		ACCOUNTING	
	Point of Sale 7 Administrator		Invoicing * Billing Administrator	
	INVENTORY		HUMAN RESOURCES	
	Inventory ? Administrator		Fleet [?] Administrator	
	ADMINISTRATION Administration 7 Settings]	
	VAN SALES Salesman ?		Supervisor 7	
	TECHNICAL			
	A warning can be set on a partner (Account) ?		A warning can be set on a partner (Stock) ?	
	Access to Private Addresses 7	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? Mail Template Editor?		Display Serial & Lot Number on Invoices? Manage Different Stock Owners?	
	Manage Lots / Serial Numbers 7	0	Manage Multiple Stock Locations 7	
	Manage Multiple Units of Measure ?		Manage Multiple Warehouses?	

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

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

E Settings General Setti	ings Users & Companies Translations Technical	🐞 🧙 5 🞯 4 My Company (San Francisco) 🛛 🕼 Mitchell Admin (vansale16_regression
Settings		Search Q
General Settings Inventory Nvoicing Fleet	Get a full traceability from vendors to customers Print GS1 Barcodes for Lots & Serial Numbers Use GS1 nomenclature datamatrix whenever barcodes are printed for lots and serial numbers. Display Lots & Serial Numbers on Delivery Slips Lots & Serial numbers will appear on the delivery slip	Set expiration dates on lots & serial numbers Consignment Set owner on stored products
Point of Sale	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 Storage Locations Track product location in your warehouse Locations Putaway Rules Storage Categories Categorize your locations for smarter putaway rules	Multi-Step Routes Use your own routes



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

- Go to *Inventory*.
- Locations.

Inventory Overview						* 🔍			Mitchell Admin (vansale16_testing
Inventory Overview	G				Şearch				۹
					▼ Filters 💲 Group By	* Favorites			1-8/8 🔇 >
Receipts		1	Internal Transfers	1	Delivery Orders		÷	Returns	I
3 TO PROCESS	3 Late		0 TO PROCESS		4 TO PROCESS	4 Late 2 Back Orders		0 TO PROCESS	
PoS Orders		i I	VAN SALE	1	VAN SALE LOAD		1	VAN SALE UNLOA	D i
0 TO PROCESS			0 TO PROCESS		0 TO PROCESS			0 TO PROCESS	

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

NEW Image: Constraint of the second	tternal ×]šearch Filters & Group By ★ Favorites Location Type Internal Location Internal Location Internal Location	1-10 / 10 《 Company My Company (San Francisco) My Company (San Francisco) My Company (San Francisco) My Company (San Francisco)
Location L VAN 1 Ir Van Ir WH/Input/Order Processing Ir	Location Type Internal Location Internal Location Internal Location	Company My Company (San Francisco) My Company (San Francisco)
VAN 1 Ir Van Ir WH/Input/Order Processing Ir	Internal Location	My Company (San Francisco) My Company (San Francisco)
Van Ir WH/Input/Order Processing Ir	Internal Location	My Company (San Francisco)
WH/Input/Order Processing	Internal Location	
		My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone In	Internal Location	
	Internal cocation	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 Ir	Internal Location	My Company (San Francisco)
WH/Stock Ir	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 1 Ir	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 2 Ir	Internal Location	My Company (San Francisco)
WH/Stock/Shelf 2/Small Refrigerator	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.

		Putaway Rules 🛛 🖧 Current Stock
Location Name ? Van Parent Location ? e.g. Physical Lo ADDITIONAL INFORMAT Location Type ? Company ? Is Van Location ? Is a Scrap Location ? Is a Return Location ? Replenish Location ?	Internal Location My Company (San Francisco)	E
External note		

Screenshot 6: Van point of sale - operation types:

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





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

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

Inventory Overview Operation	ons Products	Locations	Reporting	Configuration		* 🗨	03 му	y Company (San Fra	ncisco)	G Mitchel	ll Admin (vansale	16_testing)
Operations Types / YourCompa	iny: VAN SALE							e	Print	Action	6/8	< >	New
Operation Type ? VAN SALE Type of Operation ? Reference Sequence Sequence Prefix ? Reservation Method	Delivery Van Stock Tra VS	ation	e		Company [†] Returns Type [†] Create Backorder [†] Show Detailed Operations [†]	My Company (Sar Ask 2	n Francisco)						
LOTS/SERIAL NUMBER	s				LOCATIONS								
Create New [?] Use Existing ones [?]	2				Default Source Location [?] Default Destination Location [?]	Van Partners/Custome	ers						

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.

	tion Type ?										
VAI	N SALE L	UAD									
Type of	f Operation ?	Internal Trans	sfer			Company ?	My Company (San Fra	ancisco)			
Referen	nce Sequence [?]	Van Stock Tra	insfer Sequence			Returns Type ?					
Sequen	nce Prefix ?	VSL				Create Backorder?	Ask				
Reserva	ation Method ?	• At Confirm	nation			Show Detailed					
		O Manually				Operations ?					
		O Before sch	eduled date								
				ß							
LOTS/SE	ERIAL NUMBERS					LOCATIONS					
Create	New ?					Default Source	WH/Stock				
Use Exis	isting ones ? 🛛 🗹					Location [?] Default Destination					
						Location ⁷	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 Overview Operation	s Products Locations	Reporting Configuration		🕸 🔍 4 🗿 ³ My Company (San Francisco)	Mitchell	l Admin (va	nsale16_testing
Operations Types / YourCompan	y: VAN SALE UNLOAD			🕀 Print	Action	8/8 <	> New
Operation Type? VAN SALE U Type of Operation ? Reference Sequence ? Sequence Prefix ? Reservation Method ?	JNLCOAD Internal Transfer Van Stock Transfer Sequence VSU At Confirmation Manually Before scheduled date		Company ⁷ Returns Type ⁷ Create Backorder ⁷ Show Detailed Operations ¹	My Company (San Francisco) Ask			
LG5/SERIAL NUMBERS			LOCATIONS				
Create New ? [0		Default Source Location [?] Default Destination Location [?]	Van 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.

Fleet Fleet Reporting Configuration		*	🙊 ⁶ 🛛 ⁴ My Company (San F	Francisco) 👔 I	Mitchell Admin
C & well / New C		& Action New	Send message Log note	O Activities	🗞 🔒 🛛 Follow
NEW REQUEST	TO ORDER ORDERED REGIST	TERED DOWNGRADED RESERVE WAITING LIST		Today	
		D ⁰ Drivers Hi Contracts	Mitchell Admin Creating a new record		
Model ?					
e.g. Model S		(A)			
License Plate [?] e.g. PAE 326					
e.g. FAL 520 Tags?					
DRIVER	VEHICLE				
Driver [?]	Category [?]				
Future Driver [?]	Chassis Number ?				
Assignment Date ?	Fleet Manager ?				
Company ? My Company (San Francisco)	Location ?				
Tax Info Model Note					
FISCALITY	CONTRACT				
Horsepower Taxation ? \$ 0.00	First Contract Date ?	08/12/2024			
	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.



Screenshot 12: Enter new POS details:



Screenshot 13: Edit new POS:

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

III Point of Sale Dashboard Orders Produc	ts Van Stock Transfer Unload	Reporting Configuration			* 🧙 🙆	My Company (San Francisco)	Mitchell Admin	
Point of Sale				Search				Q
				▼ Filters 🛛 ♦ Group By	🚖 Favorites		1-3/3 < >	F =
POS Test Shop			1	pos				i
	View	Reporting				Last Closing Date	08/12/2024	
NEW SESSION	Orders Sessions	Orders		NEW SESSION		Last closing bate	000 12/2021	
POS Test	Edit							
NEW SESSION								

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.





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.

Inventory Overview	Operations Products Log	cations Reporting Configuration	жे 🗨 4 🙆 з мус	Company (San Francisco) 🥢 Mitchell Admin (vansale16_testing)
Inventory Overview	Replenishment		Search	٩
	Inventory Adjustments		▼ Filters 📚 Group By 🔺 Favorites	1-8/8 < >
	Van Stock Transfer Load Transfers			
Receipts	Scrap	Internal Transfers	Delivery Orders I	Returns I
3 TO PROCESS	Run Scheduler	0 TO PROCESS	4 TO PROCESS 4 Late 2 Back Orders	0 TO PROCESS
PoS Orders	: &	VAN SALE	VAN SALE LOAD	VAN SALE UNLOAD
0 TO PROCESS		0 TO PROCESS	0 TO PROCESS	0 TO PROCESS

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*.

n Sales Stock Transfer / New 💁 🤊		Act	tion N
ITIATE TRANSFER CANCEL	DRAFT		
/			
Company ? My Company (San Francisco)	Picking Type ? Load		
Point of Sale ? VAN Test (not used)	Date ? 01/07/2025 17:55:51		
Supervisor ? Mitchell Admin			
VAN DETAILS			
Van ? Audi/A1/1-AUD-001			
Salesman ? Mitchell Admin			
Operations Other Informations			
Product		Demand	Done
[E-COM10] Pedal Bin		1.00	0.00 t
Add a line			
		6	

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.

Wan Sales Stock Transfer / LOAD/	Broducte Locations Reporting Configuration Validation Error	* • ⁴ 3 Mu Company (Can Franc X
INITIATE TIMNSFER CANCEL	Insufficient stock for product Letter Tray. Please adjust the quantities or restock the product before creating the transfer	
LOAD/TRANS/009 Company [?] My Company (San Frar	ОК	
Point of Sale ? VAN Test (not used)	Date [?] 01/07/2025 17:55:51	
Supervisor [?] Mitchell Admin		
VAN DETAILS		
Van [?] Audi/A1/1-AUD-001		
Salesman ? Mitchell Admin		
Operations Other Informations		
Product	Demand Done	
[FURN_0004] Letter Tray	1.00 0.00 😫	

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

	verview Operations	Products Locatio	ns Reporting	Configurati					
Van Sales Stock Ti	ransfer / LOAD/TF	RANS/009					🌣 Action	1/1 <	New
APPROVE REJECT						DRAFT		LOADED	APPROVED
								→ ¹ Trans	nsfers
Validate the T LOAD/TRANS	ransfer(s) to appro	ve this Van stoc	transfer						
Company ?	My Company (San Francis	sco)	F	Picking Type ?	Load				
Point of Sale ?	VAN Test (not used)		C	Date [?]	01/07/2025	17:55:51			
Supervisor ?	Mitchell Admin								
VAN DETAILS									
Van ? Aud	li/A1/1-AUD-001								
Salesman ? Mite	chell Admin					\square			

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 - Restructs Locations			🜨 2 👩 🚽 y Company (San Francisco) 🖉 Marc Demo
Van Sales Stock Transfer / LOAD/			× 🗞 🔒 1 Follow
CANCEL You can not Validate the	Transfer. Please contact to your Supervisior to Validate the Transfer		oday
ок			
Validate the Transfer(s) to approve this Van stock t LOAD/TRANS/010	ransfer		● • Draft → Waiting (Status)
Company My Company (San Francisco)	Picking Type Load	0	Mitchell Admin - a minute ago Van Stock Transfer created
Point of Sale VAN Test (not used)	Date 01/07/2025 18:11:42		
Supervisor Mitchell Admin			
VAN DETAILS			
Van Audi/A1/1-AUD-001			
Salesman Marc Demo			
Operations Other Informations			
Product	Demand	Done	
[E-COM10] Pedal Bin	10.00	0.00	

• Each salesman can see only his/her Records.

Inventory Overview	Operations Products Locations		Search		R ²	Ø My Company (Sar	n Francisco) 🦉 Marc
			▼ Filters	Scroup By 🕇 Favorites			1-10 / 10 🔇
Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
01/07/2025 18:11:42	LOAD/TRANS/010	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Loaded
01/07/2025 17:55:51	LOAD/TRA	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Rejected
01/07/2025 17:23:21	UNLOAD LOAD/TRANS/009	Unload	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:21:13	LOAD/TRANS/007	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:04:35	LOAD/TRANS/006	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:03:58	UNLOAD/TRANS/005	Unload	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:02:20	LOAD/TRANS/004	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:23:32	LOAD/TRANS/003	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:21:53	UNLOAD/TRANS/002	Unload	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:17:09	LOAD/TRANS/001	Load	VAN Test (not used)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed

Screenshot 21: Van point of sale – Validate transfer:

• Only Supervisor can validate the transfer.

☆ /stock_tr	ANS/225				
Contact			Scheduled Date ?	02/06/2025 16:30:30	
Operation Type Your	Company: VAN SALE L	OAD	Source Document?	e.g. PO0032	
Source Location WH/	Stock				
Destination Location VAN	1				
Detailed Operations Op	erations Addition	al Info Note			
Product	From	To Lo	ot/Serial Number	Reserved	Done
Floudet		VAN 1		10.00	0.00
[E-COM10] Pedal Bin	WH/Stock				
	WH/Stock				



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	- Reporting Configuration		4 A 3 Mu Company (San Franc	sco) 🔞 Mitchell Admin (vansale16_testing)
Van Sales Stock Transfer / LOAD/ Validation Error			\times	🗞 👌 ✔ Following
APPROVE REJECT CANCEL You cannot reject a tran	sfer in 'Done' state. To proceed, click on the Transfers smart button, and cre	ate a return for the transfer /S	TOCK_TRANS/014.	oday
ок				
Validate the Transfer(s) to approve this Van stock	transfer		● • Draft → Waiting (Status)	
LOAD/TRANS/010		6	Mitchell Admin - 7 minutes ago	
Company ⁷ My Company (San Francisco)	Picking Type [?] Load	, i i i i i i i i i i i i i i i i i i i	Van Stock Transfer created	
Point of Sale ? VAN Test (not used)	Date ? 01/07/2025 18:11:42			
Supervisor [?] Mitchell Admin				
VAN DETAILS				
Van ⁷ Audi/A1/1-AUD-001				
Salesman ? Marc Demo				
Operations Other Informations				
Product	Demand	Done		
[E-COM10] Pedal Bin	10.00	10.00		
			k	

Inventory Overview Operations Breducts toostions	Poporting Configuration	× • • • • • • • • • • • • • • • • • • •	www.com.com.isco) Mitchell Admin (vansale16_testing)
Van Sales Stock Transfer / LOAD/ Validation Error			× ⊗ ≙1 ✔ Following
APPROVE REJECT CANCEL You cannot cancel a transfe	er in 'Done' state. To proceed, click on the Transfers smart button, and cr	eate a return for the transfer /STOCK_TRANS/014.	oday
ок			
Validate the Transfer(s) to approve this Van stock tra	nsfer	• Draft → W	
LOAD/TRANS/010 Company ⁷ My Company (Sate rancisco)	Picking Type [?] Load	Mitchell Admin Van Stock Trans	
Point of Sale ⁷ VAN Test (not used)	Date ⁷ 01/07/2025 18:11:42		
Supervisor [?] Mitchell Admin			
Supervisor Mitchell Admin			
VAN DETAILS			
Van ² Audi/A1/1-AUD-001			
Salesman ² Marc Demo			
Operations Other Informations			
Product	Demand	Done	
[E-COM10] Pedal Bin	10.00	10.00	
		*	



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 Configuration	🕸 🔍 4 🕐 3 My Company (San Francisco) 🛛 🚱 Mitchell	Admin (vansale16_testi
n Sales Stock Transfer / LOAD/TRANS/010	¢ Ac	ion 1/1 < > New Send message Log note	🗞 🙁 A1 🖌 Followin
PROVE REJECT CANCEL	DRAFT WAITI	G LOADED APPROVED Today	
Validate the Transfer(s) to approve this Van stock tra LOAD/TRANS/010	nsfer	Mitchell Admin - 10 minutes ago • Draft Waiting (Status)	
Company ? My Company (San Francisco)	Picking Type ? Load	Mitchell Admin - 10 minutes ago Van Stock Transfer created	
Point of Sale ⁷ VAN Test (not used)	Date [?] 01/07/2025 18:11:42		
Supervisor ? Mitchell Admin			
VAN DETAILS			
Van ? Audi/A1/1-AUD-001	l ₂		
Salesman [?] Marc Demo			
Operations Other Informations			
Product	Demand	Done	
[E-COM10] Pedal Bin	10.00	10.00	
		*	

Screenshot 24: Create Return:

• Click on return button.

Inventory Overview C	perations Produc	ts Locatio	ns Reporting Configuration		
Van Sales Stock Transfer / / /STOCK_TRANS/225	LOAD/TRANS/2	200 / Tran	sfers	🔒 Print 🛛 🕏 Action	1/1 < > Ne
PRINT LABELS PRINT RETU	RN SCRAP UN	ILOCK		DRAFT WAITING	
	ANS/225				
Contact			Scheduled Date ?	02/06/2025 16:30:30	
Operation Type YourCo	Operation Type YourCompany: VAN SALE LOAD Effective Date ? 02/06/2025				
Source Location WH/St	ock		Source Document?		
Destination Location VAN 1				5	
Detailed Operations Ope	rations Additiona	al Info Not	e		
Product	From	То	Lot/Serial Number	Reserved	Done 🛫
[E-COM10] Pedal Bin	WH/Stock	VAN 1		0.00	10.00
Note: Adding new products	or removing existing	products fro	m the Operations or Detailed Operat	ions tab will impact the load/unload c	operations in
the Van Sales POS.	or removing existing	products not	in the operations of betalled operati	ons tas win impact the load, amoud e	

Screenshot 25: Validate the Return:

• Stock will be moved to warehouse.

VALUARY Set QUANTITIES PRINT PRINT LABELS UNRESERVE SCRAP UNLOCK CANCE Detailed Date Source Document ² Resurved of STOCK_TRANS/225 Detailed Operations Operations Additional Info Note: Product From Constart Source Document ² Resurved Done 2 (Constart) (Constart) Detailed Operations Additional Info Note: Product From To LotyStock LotyStock Totage removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the Van Sales POS. Note: Adding new products or removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the Van Sales POS.	Inventory Overview C /an Sales Stock Transfer / / /STOCK_TRANS/229			Reporting Configuration ers / /STOCK_TRANS/225	⊖Print ✿Action 1/	/1 < > New	Send message Log note	My Company (San Francisco O Activities)
Contact Scheduled Date ¹ Contact Scheduled Date ¹ Source Location VLN 1 Source Location VLN 1 Source Document ¹ Petialed Operations Operatio	VALIDATE SET QUANTITIES		ABELS UNRES	ERVE SCRAP UNLOCK CANC	EL DRAFT WAITING	READY DONE		ute ago	
Note: Note: Note: Note:		ANS/229							5
Detailed Operations Operations Additional Info Note Product From To Lot/Serial Number Reserved Done Z [E-COM10] Pedal Bin VAN 1 WH/Stock 10.00 0.00 2 Add a line VAN 1 WH/Stock 10.00 0.00 2 Note: Adding new products or removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the 1 1							Mitchell Admin - a min Transfer created	ute ago	
Product From To Lot/Serial Number Reserved Done # [E-COM10] Pedal Bin VAN 1 WH/Stock 10.00 0.00 @ Add a line Note: Adding new products or removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the	Destination Location WH/S	tock							
[E-COM10] Pedal Bin VAN 1 WH/Stock 10.00 0.00	Detailed Operations Ope	rations Addition	nal Info Note						
Add a line Note: Adding new products or removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the	Product	From	То	Lot/Serial Number	Reserved	Done ≢			
Note: Adding new products or removing existing products from the Operations or Detailed Operations tab will impact the load/unload operations in the	[E-COM10] Pedal Bin	VAN 1	WH/Stock		10.00	0.00 🗃			
	Add a line								
	Note: Adding new products	or removing existir	a products from	the Operations or Detailed Operations	tab will impact the load/unload oper	ations in the			



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

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

Sales Stock Transfer / LOAD/TRANS/011				Action	1/1 < >
			DRAFT	WAITING	LOADED APP
					→ ¹ Transfel
Validate the Transfer(s) to approve this Van st LOAD/TRANS/011	ock transfer				
Company ? My Company (San Francisco)	ţ	Picking Type ?	Load		
Point of Sale ? VAN Test (not used)	5	Date ?	01/07/2025 18:26:31		
Supervisor ? Mitchell Admin					
VAN DETAILS					
Van [?] Audi/A1/1-AUD-001					
Salesman ? Marc Demo					
Operations Other Informations					
			Demand		Don
Product			Demand		

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	Draduete Locatione Reporting Configuration			🙊 👝 41 👩 31 Mu Company (San Eranc <mark>i</mark> sc
Van Sales Stock Transfer / LOAD/	Validation Error			×
INITIATE TRANSFER CANCEL	LOAD/TRANS/011 is in approve state. Complete the same and approve the next transf	fer.		101
LOAD/TRANS/012 Company [?] My Company (San Frar,	ок			
Point of Sale ? VAN Test (not used)	Date ? 01/07/2025 18:30:09			⊳
Supervisor [?] Mitchell Admin				
VAN DETAILS				
Van ? Audi/A1/1-AUD-001				
Salesman [?] Marc Demo				
Operations Other Informations				
Product		Demand	Done	
[E-COM11] Cabinet with Doors		1.00	0.00 🛍	
Add a line				



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

	Point of Sale	Dashboard	Orders	Products	Van Stock Transfer Unload	Reporting	Configuration		
Po	pint of Sale								Search
									T Filter
	VAN Test							:	
(NEW SESSION				Last Closing Date	01/07/	2025		

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*.





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

odoo							Mitchell Admin	
Pedal Bin -5.00 Units at ₹ 47.0	0/Units			₹.	235.00	A Chairs Desks Miscellaneous	Q Search Products	×
						Pedal Bin #47.00		
						Validation Error		
						Negative or zero quantities are not supported. Please enter a valid quantity.		
			Tota	l:₹-23	35.00	Ok	R.	
Customer Note	"D Re	efund		0 Inf	o			
La Customer		1	2	3	Qty			
		4	5	6	% Disc			
\mathbf{O}		7	8	9	Price			
Payment		+/-	0		\otimes			

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.

odoo				4 ¹	Orders		Mitchell Admin 🛛 🗇	Close
Pedal Bin 13.00 Units at ₹ 47.00	0/Units			₹	611.00	A Chairs Desks Miscellaneous	Q Search Products	×
						Pedal Bin 700 Validation Error The product [E-COM10] Pedal Bin is almost out of stock! We currently have only 13.0 units remaining. Unfortunately, we cannot fulfill orders for more than this quantity at this time. Please adjust your order accordingly.		
			Tot	al:₹6:	11.00	Ok		
Customer Note	"D Re	fund		0 Inf	0	UR		
Customer		1	2	3	Qty			
		4	5	6	% Disc			
\diamond		7	8	9	Price			
Payment		+/-	0	- 20	\bigotimes			

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

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

odoo	∳ ¹ Orders					Mitchell Admin 👳 🕞 Close
« Back			Payment			
PAYMENT METHOD Bank		Remaining ₹ 0.0	00		Change ₹ 0.00	Lustomer
summary Bank	235.00	Total Due ₹235.00				Invoice
		1	2	3	+10	
		4	5	6	+20	
		7	8	9	+50	
	Validate	+/-	0	•	$\langle X \rangle$	



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 Dashboard C	Orders Products Van Stock Transfer Unload Reporting	Configuration		🏚 🧙 🧟 🧑 🦄 Administrator (v16_pos_van)
Point of Sale		Settings	Search	Q
		Payment Methods Coins/Bills	▼ Filters 📚 Group By ★ Favorites	1-2/2 < >
Shop NEW SESSION	Last Closing Date 09/10/2024 Last Closing Cash ₹0.00	Products PoS Product Categories Taxes	I Last Closing Date 09/11/2004	
	Last Closing Cash ₹ 0.00 Balance		0	



Point of Sale	Dashboard Orders Products Van Stock Transfer Unload Reporting	Configuration	🏦 🐋 🚺 🧭 🔥 Administrator (v16_pos_van)
Settings		Search	٩
SAVE DISCARD			
General Settings	Accept payments with a Vantiv payment terminal	Accept payments with a Six payment terminal	
se Inventory	Connected Devices		
1nvoicing			
😝 Fleet	ePos Printer Connect device to your PoS without an IoT Box	Customer Display Show checkout to customers through a second display	
Point of Sale	Connect devices using an IoT Box		
	Inventory		
	Operation type Used to record product pickings. Products are consumed from its default source location. My Company: VAN SALE Barcodes O Use barcodes to scan products, customer cards, etc. Barcode Debarcodes to scan products, customer cards, etc. Barcode Default Nomenclature	Allow Ship Later Sell products and deliver them later.	
	Technical		
	Limited Products Loading Only load most common products at the opening of the PoS.	Limited Partners Loading Only load a limited number of customers at the opening of the PoS. Number of Interes Loaded Load all remaining partners in the background	

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.





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						
			\$ 143.9	6		
How would you like to rec	eive your receipt?	🕀 Print Receipt				Your logo Mr Company San Francisco Int-1 (800 0550 013) intojo provincempany com integratives company com integratives (Mitchell Admin
azure.Interior24@example.com		Closing Session Payment Method Bank Add a closing note	Expected \$143.96 Discard	To Counted 143.96_	tal 1 orders: \$ 143.96 Difference \$ 0.00	Cabinet with Doors 140.00 Dest Pad 2 x \$ 198 3.56 TOTAL \$ 143.96 Bank 143.96 CHANGE \$ 0.00 Total Taxes \$ 0.00 Order 0012-003-000 09/22/2024 1724.05
			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 Stock Transfer Unload Reporting Configuration	¥K 🔍 ⁶ ⊘ ⁴ №	ly Company (San Francisco) 🛛 🖗 Mitchell Admin
Point of Sale		Şearch	۹
		🔻 Filters 📚 Group By 🔺 Favorites	1-3/3 < > 📭 🚍
POS Test Shop	:	pos	:
CONTINUE SELLING	Last Closing Date 08/12/2024 Last Closing Cash Balance \$ 0.00	NEW SESSION	Last Closing Date 08/12/2024
	6		
POS Test			
NEW SESSION			



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 Prod	ucts Van Stock Trar	nsfer Unload	Reporting	Configuration			
n Sales Stock	Transfer / New 🏼 🖕 🔊						Action	Ne
ITIATE TRANSFER					DRAFT	WAITING	LOADED	APPRO
/								
Company ?	My Company (San Francisco)		Pickin	g Type ?	Unload			
Point of Sale ?	VAN Test (not used)		→ Date ?		01/23/2025 11:49:26			
Supervisor ?	Mitchell Admin							
VAN DETAILS								
Van ? A	udi/A8/kl01							
Salesman ? N	larc Demo							
Operations	Other Informations							
					Demand			Done
Product					Demana			D one

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.

I Point of Sale Dashboard Order	Broducto Van Stack Transfor Upload Paparti	configuration		👝 2 🙆 My Com
Van Sales Stock Transfer / UNLOA	Validation Error			×
CANCEL	You can not Validate the Transfer. Please contact to yo	ur Supervisior to Validate the Transfer	r	īoday
	ОК		l≩	
Validate the Transfer(s) to appr	ove this Van stock transfer			● • Draft → Waiting (Status)
UNLOAD/TRANS/013			G	Mitchell Admin - now
Company My Company (San Franci	co) Picking Type	Unload		Van Stock Transfer created
Point of Sale VAN Test (Mitchell Admir	Date	01/07/2025 18:38:56		
Supervisor Mitchell Admin				
VAN DETAILS				
Van Audi/A1/1-AUD-001				
Salesman Marc Demo				
Operations Other Informations				
Product		Demand	Done	
[E-COM10] Pedal Bin		5.00	0.00	

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

/an Sales Stock Transfer			Search				
NEW 🕹			▼ Filters	Group By 🔺 Favorites			1-13 / 13 < 🔅
Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
01/07/2025 18:38:56	UNLOAD/TRANS/013	Unload	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Loaded
01/07/2025 18:30:09	LOAD/TRANS/012	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Draft
01/07/2025 18:26:31	LOAD/TRANS/011	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Running
01/07/2025 18:11:42	LOAD/TRANS/010	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Rejected
01/07/2025 17:55:51	LOAD/TRANS/009	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Rejected
01/07/2025 17:23:21	UNLOAD/TRANS/008	Unload	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:21:13	LOAD/TRANS/007	Load	VAN Test (Mitchell Admin)	Mitchell Admin 🛛 🖑	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:04:35	LOAD/TRANS/006	Load	VAN Test (Mitchell Admin)	Mitcl Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:03:58	UNLOAD/TRANS/005	Unload	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/07/2025 17:02:20	LOAD/TRANS/004	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:23:32	LOAD/TRANS/003	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:21:53	UNLOAD/TRANS/002	Unload	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed
01/06/2025 10:17:09	LOAD/TRANS/001	Load	VAN Test (Mitchell Admin)	Mitchell Admin	Audi/A1/1-AUD-001	Marc Demo	Completed

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

• Only Supervisor can Validate the transfer.



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

• Only Supervisor can Approve the transfer.

Point of Sale Dashboard Orders Products Van Stock	k Transfer Unload Reporti	ng Configuration						
Van Sales Stock Transfer / UNLOAD/TRANS/151 & Action 1/1 <>								
APPROVE		DRAFT		LOADED APPROVED				
				→ ¹ Transfers				
Validate the Transfer(s) to approve this Van stock tr UNLOAD/TRANS/151	ansfer							
Company ? My Company (San Francisco)	Picking Type ?	Unload						
Point of Sale ? VAN Test (not used)	Date ?	01/23/2025 11:49:26						
Supervisor [?] Mitchell Admin				G				
VAN DETAILS								
Van [?] Audi/A8/kl01								
Salesman ? Marc Demo								
Operations Other Informations								
Product		Demand		Done				
[E-COM10] Pedal Bin		5.00		5.00				



Screenshot 41: Van point of sale – Close session:

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

Closing Session	
------------------------	--

Total 1 orders: \$ 170.00

Payment Method	Expected	Counted		Difference	
Cash	\$ 200.00		0	\$-200.00	
Opening	\$ 0.00				
+ Cash difference observed during the counting (Profit) - opening	\$200.00				
Bank	\$ 170.00		170	\$0.00	
Customer Account	\$0.00				
Add a closing note					
Close Session Backend Disc	ard				±



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 v16.0 Community and Enterprise Editions.

6. Changes Log / Release Notes

Version 1.0.3: February 2025

- Automated Status Updates: Load transfers now automatically move to Cancelled or Rejected if a "Supervisor" rejects them after validation.
- **Unloading Adjustment**: Unloading is no longer required for rejected transfers.
- **POS Session Fix**: Resolved an issue where users encountered errors while closing a simple POS session.
- Sales Restrictions: Prevented sales with negative quantities in the POS Shop.
- **Stock Discrepancy Fix**: Addressed inconsistencies when an unload transfer is created in one window while another session simultaneously sells items.
- **Stock Update Accuracy**: Fixed incorrect stock updates when multiple POS sessions use the same Van location.
- **Stock Availability Enforcement**: The system now prevents selling more than the available stock in the current session's Van location.
- Real-Time Stock Updates: Stock levels now update instantly.
- **Product Visibility Enhancement**: Sold-out products are automatically removed from the session.
- Role-Based Access Control: Defined role-based access privileges for Salesmen and Supervisors.



Version 1.0.2: September 2024

• Role access privilege set for salesman and supervisor.

Version 1.0.1: August 2024

- Automatic updating of product line while unloading operation.
- Only Products in the Van location is visible in POS sale.

Version 1.0.0: April 2023

• Initial version.

7. Support

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