

User Manual

POS Inventory Report Plugin

For

Odoo v17.0



Table of contents

1.	Introduction	. 3
2.	Features	.3
3.	POS Session Management	.4
4.	Technical Requirements / Compatible With:	. 8
5.	Changes Log / Release Notes	. 8
6.	Support	.8

pits

1. Introduction

In inventory management, businesses often struggle with manual stock evaluations, limited real-time visibility, and the constant burden of maintaining checklists. PITS introduces an innovative solution designed to eliminate these challenges and transform the way you manage inventory.

2. Features

- **Performance Tracking** Monitor inventory performance to identify top-selling products and make data-driven decisions, optimizing sales and profitability.
- Sales Analysis Gain insights into customer preferences and sales trends to refine product assortment, pricing, and marketing strategies, increasing revenue and customer satisfaction.
- **Stock Valuation** Accurately assess inventory value for financial control and decision-making. Track daily stock valuation and access weekly profit/sales details for deeper financial insights.
- **Paperless Inventory Management** Eliminate manual checklists, saving time, reducing errors, and promoting an eco-friendly, efficient inventory management process.
- **Reorder Management** Automate reordering with data-driven forecasts and demand planning, ensuring timely product availability and optimized inventory levels.
- Accurate Inventory Tracking Gain real-time visibility into stock levels, minimizing stockouts and overstocking while improving order fulfilment and operational efficiency.
- **Daily In/Out Report** Track daily inventory movements with session-level precision, ensuring accurate record-keeping and informed decision-making.



3. POS Session Management

A **Session** represents a single day's sales and stock activities. Every day, shop staff must create a **New Session** to carry out POS operations and record sales-related transactions. At the end of the day, the session must be **closed** before generating the inventory report for that session.

Steps for POS Session Management

I. Start a POS Session

- Begin a new POS session to initiate the sales process.
- This marks the start of a dedicated period where customer orders and transactions are processed.

	Q Search	*
Closing Balance	i 04/02/2025 \$ 0.00	
	Balance	Closing 04/02/2025 Balance \$ 0.00

Screenshot 1: Point of sale dashboard

- II. Perform POS operations: Once the POS session is active, you can perform a range of essential operations. These include scanning and adding products to the order, applying discounts, managing payment methods, and generating invoices or receipts.
 - Once the session is active, staff can:
 - \circ $\,$ Scan and add products to the order $\,$
 - Apply discounts
 - Manage payment methods



odoo											S Mitchell 4	Admin 🗢 🗏
Acoustic Bloc Scree 2.00 Units x \$ 339				\$ 678.50	a. 🖉						Q S	earch products
Cabinet with Doors \$ 322.00 2.00 Units x \$ 161.00 / Units			Mise									
								-	5			R
					Acoustic Bloc Screens	Cabinet with Doors	Desk Organizer	Desk Pad	Desk Stand with Screen	Drawer	Drawer Black	Flipover
					\$ 339.25	\$ 161.00	\$ 5.10/Units	\$ 2.28/Units	\$ 2,415.00	\$ 127.08	\$ 28.75	\$ 2,242.50
					-		1	1			-	000
				1,000.50	Individual Workplace \$ 1,017.75	Large Cabinet \$ 368.00	Large Meeting Table \$ 4,600.00	LED Lamp \$ 1.04/Units	Letter Tray \$ 5.52/Units	Magnetic Board \$ 2.28/Units	Monitor Stand \$ 3.67/Units	Newspaper Rack \$ 1.47/Units
D Ref	fund		Customer	Note			A			N.	-	Virtual Home Staging
Customer	1	2	3	Qty	[] M		5			-	-	
	40	5	6	% Disc	Office combo	Office Design Software	Office Lamp	Pedal Bin	Small Shelf	Storage Box	Three-Seat Sofa	
>	7	8	9	Price	\$ 160.00	\$ 322.00	\$ 46.00	\$ 54.05	\$ 2.83/Units	\$ 18.17	\$ 1,725.00	\$ 43.99
Payment	*/-	0	22	-	Virtual Interior Design	ŧ	1					

• Generate invoices or receipts

Screenshot 2: Point of sale order page

III. Close the Session

- After processing all orders for the day, the session must be closed.
- Closing the session finalizes the sales data, ensuring accurate recordkeeping and reporting.

IV. Select a Session for Inventory Reporting

- To retrieve an inventory report for a specific session:
 - Navigate to **Orders > Sessions**

oint of Sale	Orders		Q Search	
	Sessions			
Shop	Payments Preparation Printers Customers	Closing	I 04/03/2025	
New Session		Balance	\$ 0.00	

Screenshot 3: Sessions Menu

• Choose the required session from the list and proceed to download the report.

Sessions O		Q South_		•	1-40/40 < >
Session ID	Point of Sale	Opened By	Opening Date	Closing Date	Status
POS/00040	Shop (not used)	S Mitchell Admin	04/03/2025 11:18:20	04/03/2025 11:22:00	Closed & Posted
POS/00039	Shop (not used)	Mitchell Admin	04/02/2025 15:01:27	04/02/2025 15:01:49	Closed & Posted
POS/00038	Shop (not used)	itchell Admin	04/01/2025 12:13:03	04/01/2025 12:14:16	Closed & Posted
POS/00037	Shop (not used)	Sitchell Admin	04/01/2025 12:11:04	04/01/2025 12:12:37	Closed & Posted
POS/00036	Shop (not used)	Mitchell Admin	04/01/2025 10:59:54	04/01/2025 11:01:39	(Closed & Posted)
POS/00035	Shop (not used)	Mitchell Admin	04/01/2025 10:54:11	04/01/2025 10:55:17	Closed & Posted
POS/00034	Shop (not used)	Mitchell Admin	04/01/2025 10:52:09	04/01/2025 10:52:36	Closed & Posted

Screenshot 4: Sessions Page List View

V. Generate an Inventory Report

- Use the **Print** feature to generate a detailed inventory report for the selected session.
- The report includes crucial inventory details such as product quantities and values.
- Steps to download:
 - $\circ \quad \text{Click on Gear Icon} \rightarrow \text{Select Print} \rightarrow \text{Choose Inventory Report}$



isions (5/00040 O	Coders Coders S Payments 1000.50	1/40 <
Print Sales Details Inventory Report		In Progress Closing Control Closed & Posted
POS/00040		
Opened By Mitchell Admin		
Point of Sale Shop (not used)		
Opening Date 04/03/2025 11:18:20		
Josing Date 04/03/2025 11:22:00		
tarting Balance \$ 0.00		
Ending Balance \$ 0.00		
nd message Log note Activities		Q % 8' Followin

Screenshot 5: Inventory Report Download Button

VI. POS Inventory Report

- The report is generated in **Excel format**, capturing:
 - o Products sold
 - Remaining stock levels
 - Financial insights
- This allows businesses to:
 - Perform further calculations
 - Generate visualizations
 - o Gain deeper insights into sales performance

The **POS Sessions** feature enhances daily sales tracking, streamlining inventory management and improving decision-making.



	А	В	С	D	E	F					
1	POS Inventory Report										
2											
3	Session:	POS/00040	User:	Mitchell Admin	Location:	WH/Stock					
4	Session Start:	04/03/2025 11:18	Point of Sale:	Shop	Session Closed:	04/03/2025 11:22					
5	Product Categ	Product	Sold Qty	Current Stock							
6	Office Furniture	[E-COM11] Cabinet with Doors	2	15							
7	Office Furniture	[FURN_6666] Acoustic Bloc Scree	2	4							
8											
9											

Screenshot 6: Excel report of POS session

4. Technical Requirements / Compatible With:

Technical Requirements:

- Odoo Modules:
 - o *Inventory*
 - Point of Sale
- Additional Dependency:
 - Base Report XLSX <u>Download from Odoo Apps</u>

Compatibility:

• Odoo v17.0 Community and Enterprise Editions.

5. Changes Log / Release Notes

- Version 1.0.0 April 2025
 - o Initial release.

6. Support

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