User Manual

POS Inventory Report Plugin

For

Odoo v17.0

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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.
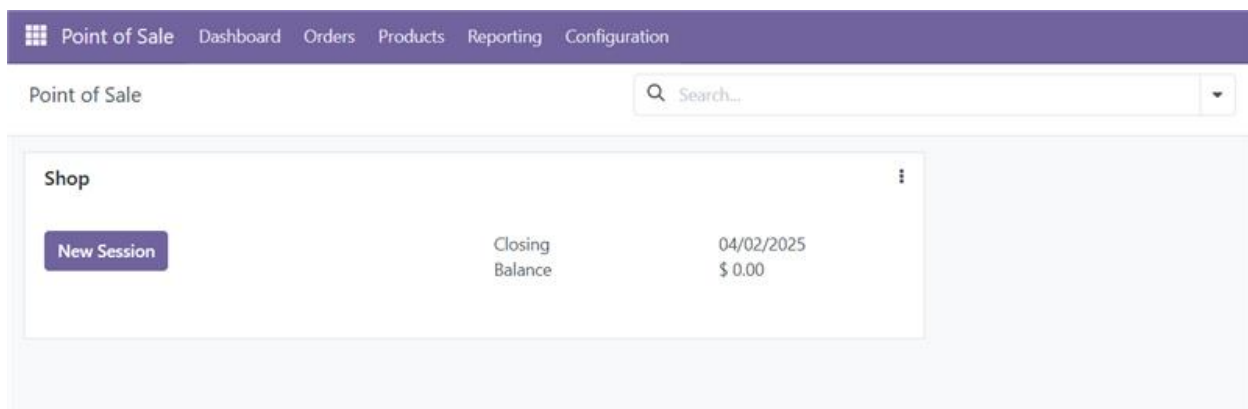
3.   POS Session Management

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.

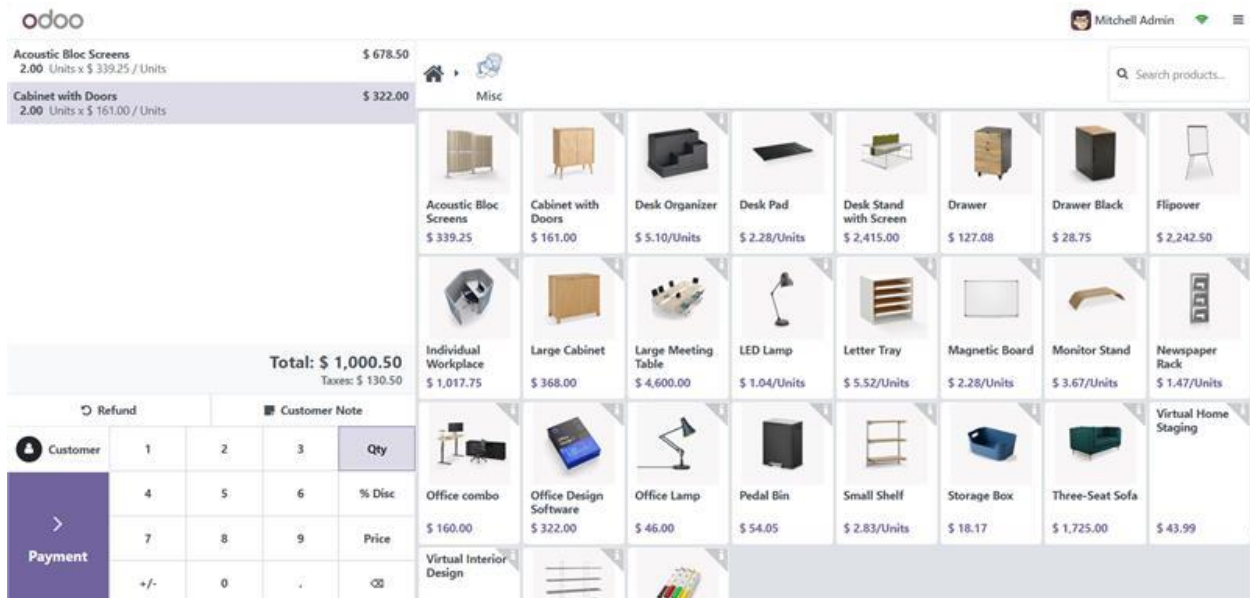- This marks the start of a dedicated period where customer orders and transactions are processed.

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:

    o   Scan and add products to the order

    o   Apply discounts

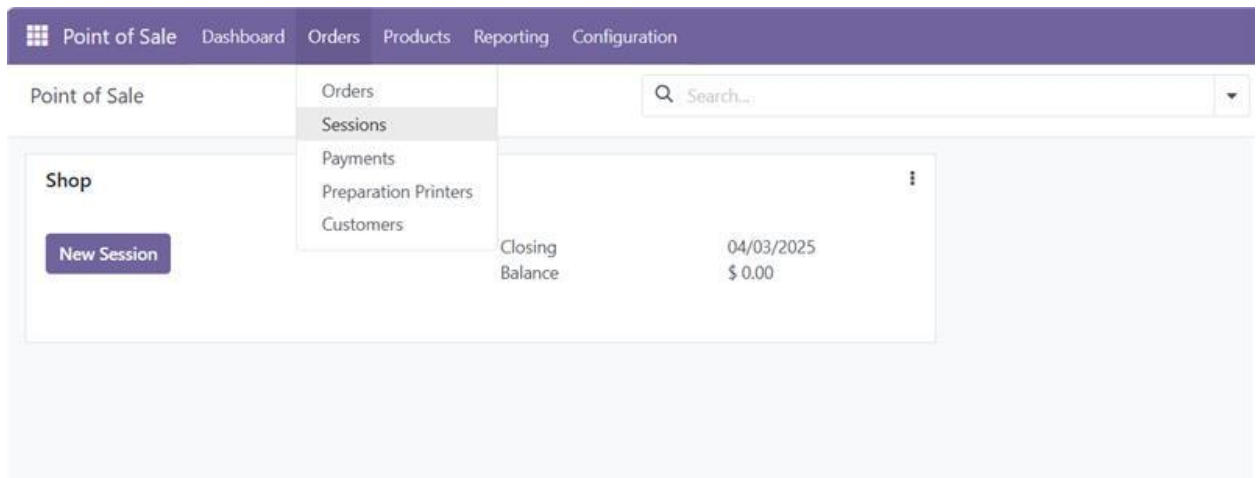   o   Manage payment methods

o 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.

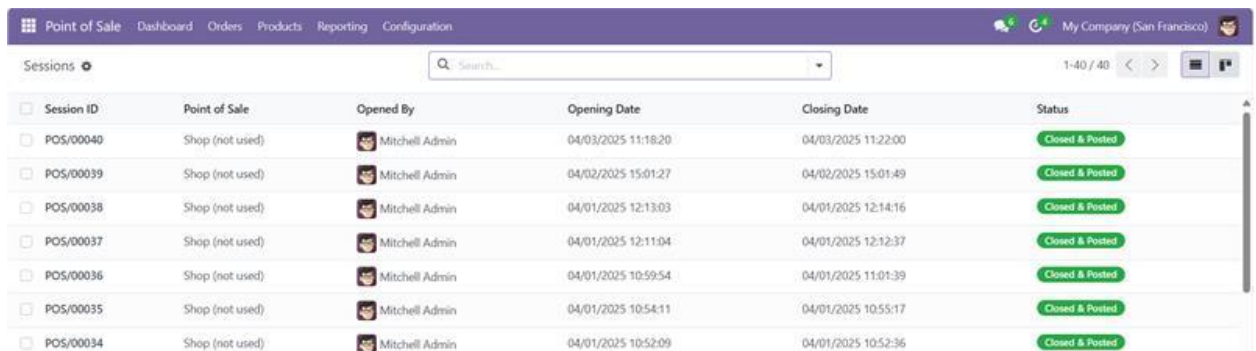- Closing the session finalizes the sales data, ensuring accurate record-keeping and reporting.

IV. Select a Session for Inventory Reporting

- To retrieve an inventory report for a specific session:

  o Navigate to **Orders > Sessions**

Screenshot 3: Sessions Menu

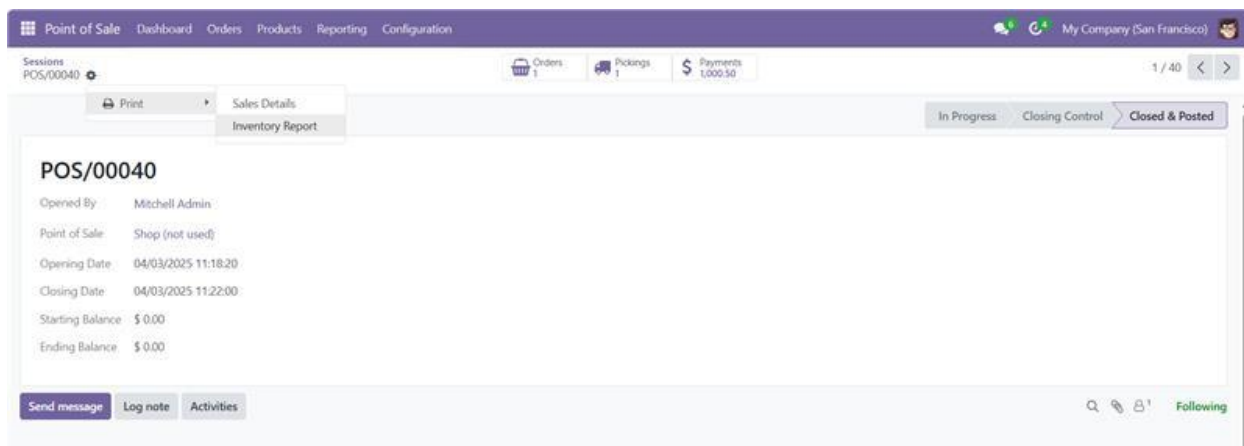- Choose the required session from the list and proceed to download the report.

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:

  o   Click on **Gear Icon** → Select **Print** → Choose **Inventory Report**

Screenshot 5: Inventory Report Download Button

VI.   POS Inventory Report

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

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

	A	B	C	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*
  - o *Point of Sale*
- **Additional Dependency:**
  - o Base Report XLSX – [Download from Odoo Apps](#)

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 webshopextension.com or email at support@webshopextension.com.