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Implementation Guide

# **Van Point of Sale**

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## 1.0 Introduction

Van Sale is a type of distribution method where the products will be loaded to the van from the manufacturer/warehouse and it is sold to customers/retailers. At the end of the session the remaining products should be unloaded to the initial location. The loading and unloading process will be managed by supervisor and salesman respectively.

The Van Sale module is developed to ease this van sale management. The module works on top of the point of sale module. The main features covered in this module are location management, loading and unloading with approval process, point of sale session management and so on.

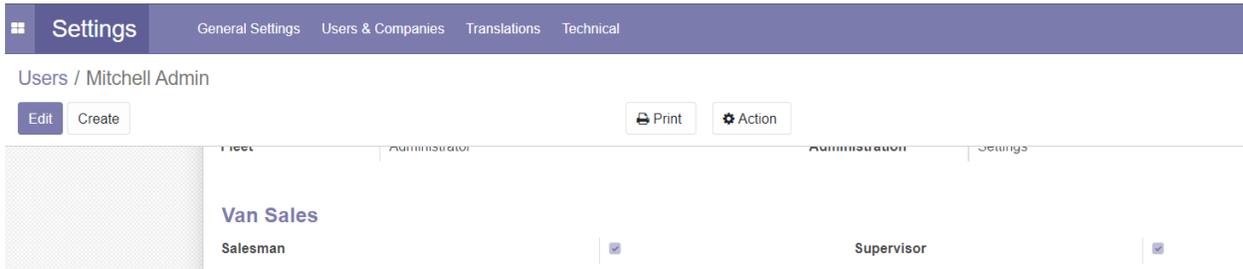
## 1.1 Features

Version: 14.0:

- Easy to configure POS as Van Sale POS.
- 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.
- User roles such as salesman and supervisor are managed.

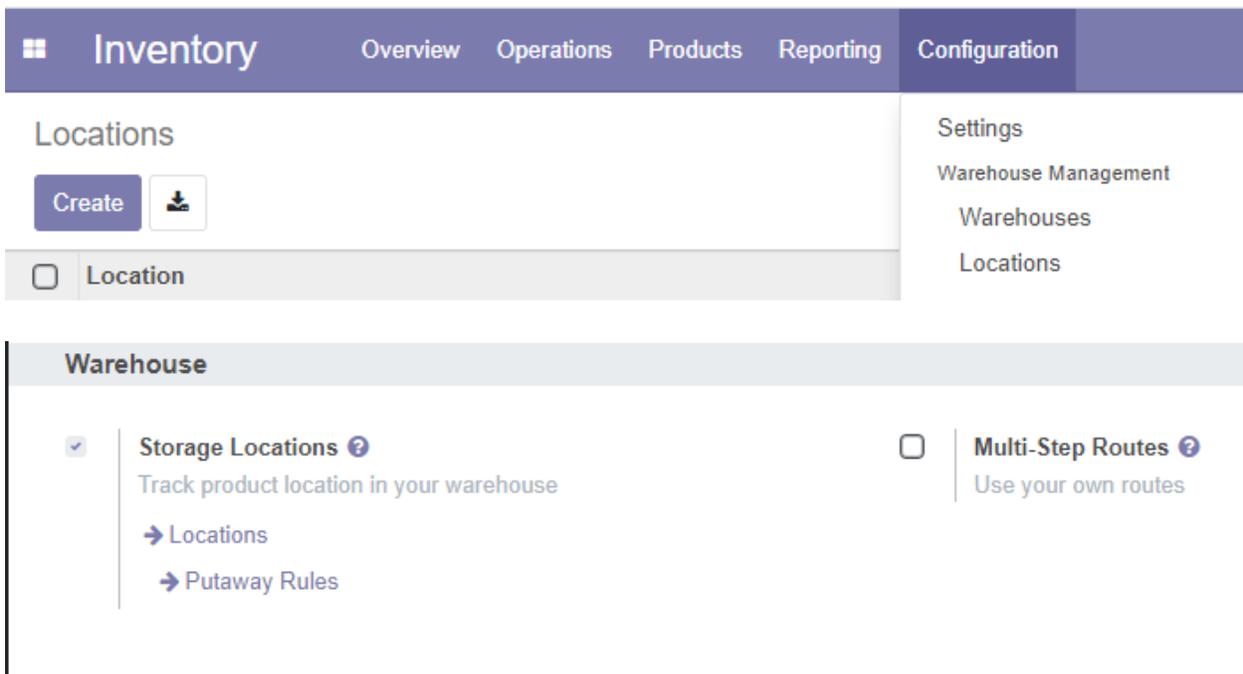
## 1.2 Screenshots

Screenshot 1: Van point of sale - Add user groups:



	Salesman	Supervisor
Van Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Screenshot 2: Van point of sale - location enable:



**Locations**

Create 

Location

**Warehouse**

**Storage Locations**   
Track product location in your warehouse

- Locations
- Putaway Rules

**Multi-Step Routes**   
Use your own routes

Screenshot 3: Van point of sale - adding location:

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[Putaway Rules](#) [Current Stock](#)

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Location Name

Parent Location

**Additional Information**

Location Type

Is a Scrap Location?

Is a Return Location?

External note...

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Screenshot 4: Van point of sale - operation type 1:

<b>Operation Type</b>	VAN_SALE	<b>Type of Operation</b>	Delivery
<b>Code</b>	VS	<b>Operation Type for Returns</b>	
		<b>Show Detailed Operations</b>	<input checked="" type="checkbox"/>

**Locations**

<b>Default Source Location</b>	VAN
<b>Default Destination Location</b>	Partner Locations/Customers

Screenshot 5: Van point of sale - operation type 2:

<b>Operation Type Code</b>	VAN_SALE_LOAD VSL	<b>Type of Operation</b>	Internal Transfer
		<b>Operation Type for Returns</b>	
		<b>Show Detailed Operations</b>	<input checked="" type="checkbox"/>

**Locations**

<b>Default Source Location</b>	WH/Stock
<b>Default Destination Location</b>	VAN

Screenshot 6: Van point of sale - operation type 3:

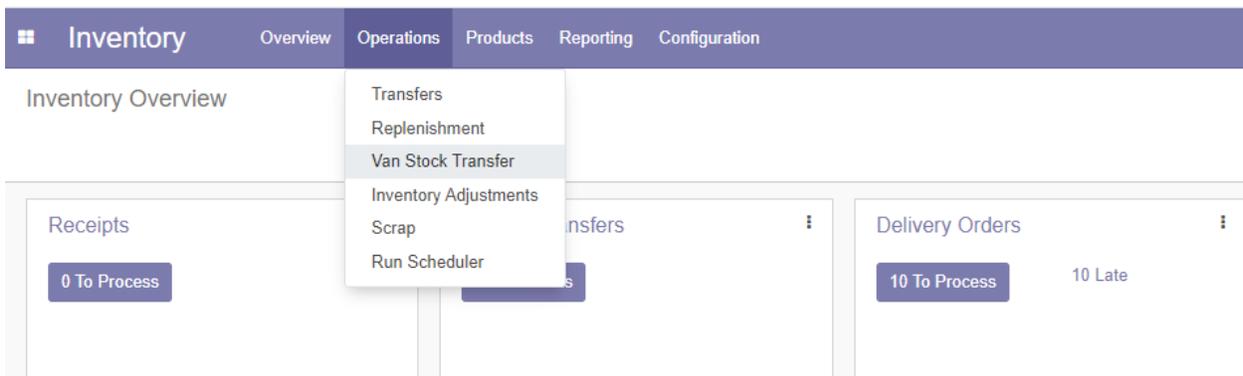
<b>Operation Type Code</b>	VAN_SALE_UNLOAD VSU	<b>Type of Operation</b>	Internal Transfer
		<b>Operation Type for Returns</b>	
		<b>Show Detailed Operations</b>	<input checked="" type="checkbox"/>

**Locations**

<b>Default Source Location</b>	VAN
<b>Default Destination Location</b>	WH/Stock

Screenshot 7: Van point of sale - van stock transfer:



The screenshot shows the 'Inventory' application interface. The top navigation bar includes 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The 'Operations' menu is open, displaying a list of options: 'Transfers', 'Replenishment', 'Van Stock Transfer', 'Inventory Adjustments', 'Scrap', and 'Run Scheduler'. The 'Van Stock Transfer' option is highlighted. Below the menu, the 'Inventory Overview' section is visible, containing three main cards: 'Receipts' (0 To Process), 'Transfers' (partially obscured), and 'Delivery Orders' (10 To Process, 10 Late).

Screenshot 8: Van point of sale - van stock transfer-load and initiate transfer:

Initiate Transfer Cancel
Draft Waiting Loaded Approved

**LOAD/TRANS/009**

Company	YourCompany	Picking Type	Load
Point of Sale	VAN SALE NEW 2 (not used)	Date	09/01/2022 11:40:44
Supervisor	Marc Demo	Transfer	<input type="checkbox"/>
		Can Approve	<input checked="" type="checkbox"/>
		Can View	<input checked="" type="checkbox"/>
		Can Cancel	<input checked="" type="checkbox"/>

**Van Details**

Van	Mercedes/Class A/1-MER-001
Salesman	Mitchell Admin

Operations
Other Informations

Product	Demand	Done
[CONS_0001] Whiteboard Pen	5.00	0.00

Screenshot 9: Van point of sale - van stock transfer-transfer:

 1 Transfers

**LOAD/TRANS/009**

Company	YourCompany	Picking Type	Load
Point of Sale	VAN SALE NEW 2 (not used)	Date	09/01/2022 11:40:44
Supervisor	Marc Demo	Transfer	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px;">WH/VSL2/00003</span>
		Can Approve	<input type="checkbox"/>
		Can View	<input checked="" type="checkbox"/>
		Can Cancel	<input checked="" type="checkbox"/>

**Van Details**

Van	Mercedes/Class A/1-MER-001
Salesman	Mitchell Admin

Operations
Other Informations

Product	Demand	Done
[CONS_0001] Whiteboard Pen	5.00	0.00

Screenshot 10: Van point of sale - van stock transfer-transfer validate:

Validate Print Unreserve Scrap Unlock Cancel Draft Waiting Ready Done

☆ **WH/VSL2/00003**

Contact	San Francisco: VAN_SALE_LOAD_2	Scheduled Date	09/01/2022 11:40:44
Operation Type	WH/Stock	Source Document	
Source Location	WH/Stock		
Destination Location	VAN KTYM		

Detailed Operations: Operations Additional Info Note

Product	From	To	Reserved	Done
[CONS_0001] Whiteboard Pen	WH/Stock	VAN KTYM	5.00	0.00

Screenshot 11: Van point of sale - van stock transfer-transfer approve:

Approve Draft Waiting Loaded Approved

Validate the Transfer(s) to approve this Van stock transfer

**LOAD/TRANS/009**

Company	Your Company	Picking Type	Load
Point of Sale	VAN SALE NEW 2 (not used)	Date	09/01/2022 11:40:44
Supervisor	Marc Demo	Transfer	WH/VSL2/00003
		Can Approve	<input checked="" type="checkbox"/>
		Can View	<input checked="" type="checkbox"/>
		Can Cancel	<input type="checkbox"/>

**Van Details**

Van	Mercedes/Class A/1-MER-001
Salesman	Mitchell Admin

Operations Other Informations

Product	Demand	Done
[CONS_0001] Whiteboard Pen	5.00	5.00

Activate Windows

Screenshot 12: Van point of sale - new pos creation:

**Point of Sale**

Is a Bar/Restaurant

**Is VAN POS**

Supervisor: Mitchell Admin

Van: Audi/A1/1-AUD-001

Salesman: Mitchell Admin

**Authorized Employees**  
Use employee credentials to log in to the PoS session and switch cashier

**PoS Interface**

**Manage Orders**  
Reprint receipt, refund and exchange orders

**Category Pictures**  
Display pictures of product categories

**Start Category**  
Start selling from a default product category

**Product Configurator**  
Select product attributes

**Restrict Product Categories**  
Pick which product categories are available

**Large Scrollbars**  
Improve navigation for imprecise industrial touchscreens

**Connected Devices**

**IoT Box**  
Connect devices using an IoT Box

**Direct Devices**  
Connect devices to your PoS directly without an IoT Box

Screenshot 13: Van point of sale - operation type selection:

**Operation Type**  
Operation type used to record product pickings  
Products will be taken from the default source location of this operation type

San Francisco: PoS Orders

**Operation Type(Load)**  
Operation type used to record product pickings  
Products will be taken from the default source location of this operation type

San Francisco: VAN\_SALE\_LOAD

**Operation Type(Unload)**  
Operation type used to record product pickings  
Products will be taken from the default source location of this operation type

San Francisco: VAN\_SALE\_UNLOA

Screenshot 14: Van point of sale - sale closing:

Continue Selling
Close Session & Post Entries
In Progress
Closing Control
Closed & Posted

1 Orders
 1.24 Payments

**POS/00005**

Opened By: Mitchell Admin  
Point of Sale: VAN SALE NEW 2 (Mitchell Admin)  
Opening Date: 09/01/2022 17:27:55

VAN Stock Transfer

Date	Reference	Picking Type	Point of Sale	Supervisor	Van	Salesman	Status
08/31/2022 11:58:04	LOAD/TRANS/007	Load	VAN SALE NEW 2 (Mitchell Admin)	Marc Demo	Mercedes/Class A/1-MER-001	Mitchell Admin	Completed

Screenshot 15: Van point of sale - unloading for sale closing:

 1 Transfers

**UNLOAD/TRANS/004**

<b>Company</b>	YourCompany	<b>Picking Type</b>	Unload
<b>Point of Sale</b>	VAN SALE NEW (not used)	<b>Date</b>	08/30/2022 18:01:11
<b>Supervisor</b>	Mitchell Admin	<b>Transfer</b>	WH/VSU/00002
		<b>Can Approve</b>	<input type="checkbox"/>
		<b>Can View</b>	<input checked="" type="checkbox"/>
		<b>Can Cancel</b>	<input checked="" type="checkbox"/>

**Van Details**

<b>Van</b>	Audi/A1/1-AUD-001
<b>Salesman</b>	Mitchell Admin

Operations | Other Informations

Product	Demand	Done
[FURN_0001] Desk Organizer	5.00	0.00

Screenshot 16: Van point of sale - unloading transfer validating:

Validate | Print | Unreserve | Scrap | Unlock | Cancel

Draft | Waiting | Ready | Done

☆ **WH/VSL/00002**

<b>Contact</b>	San Francisco: VAN_SALE_LOAD	<b>Scheduled Date</b>	12/07/2022 17:41:49
<b>Operation Type</b>	WH/Stock	<b>Source Document</b>	
<b>Source Location</b>	WH/Stock		
<b>Destination Location</b>	VAN		

Detailed Operations | Operations | Additional Info | Note

Product	From	To	Reserved	Done
[CONS_0001] Whiteboard Pen	WH/Stock	VAN	2.00	0.00

### 1.3 Brief description

This module adds new features point of sale that are specific to VAN sale. Each and every 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 also 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.

### 1.3.1 Initial step-by-step description

1. Step 1 -Install the module Van Point Of Sale.
2. Step 2 - Goto inventory module and activate the settings option.
3. step 3 - Set user groups for the corresponding users
4. Step 4 - Add the location in the location setting.
5. Step 5 - Add the operation types in module inventory.
6. Step 6 - Then initiate the van stock transfer loading process.
7. Step 7 -The load should be validated before it is approved to transfer state.
8. step 8-The manager should give them access to transfer the load.
9. step 9-Then create a new point sale.
10. step 10-While creating new pos add the operation type to it.
11. step 11-After sale we can close the pos session in the pos module.
12. step 12-If the product didn't get sold then we should make a unloading process then only we can close the session.

### 1.4 Technical Requirements / Compatible With:

Technical Requirements: Odoo point of sale, Inventory, fleet Module.