

User Manual

Van Sales POS Plugin for Odoo v18.0



Table of Contents

	3
2. Features	
3. Screenshots	4
4. Brief Description	41
5. Technical Requirements / Compatible With:	43
6. Changes Log / Release Notes	43
7. Support	44

pits

1. Introduction

The Van Point of Sale module is easy to install and seamlessly integrates with the Odoo web shop. This module introduces specialized features tailored for van sales operations. All products are managed through the warehouse, with inventory fully controlled by the module. The process begins with loading products onto the van and concludes with unloading any unsold items back into the warehouse.

2. Features

- Effortless Configuration: Easily set up a POS system specifically for van sales.
- Van Stock Recording: Keep detailed records of all van stock.
- Loading and Unloading Tracking: Monitor and log product loading and unloading processes.
- Session-Based Management: Sessions are primarily managed based on the loading and unloading activities.
- Integrated Stock Control: Seamlessly manage stock through the inventory module.
- **Transparent Stock Transfer History**: Maintain a clear and accessible history of stock transfers.
- Enhanced POS Features: Introduces additional functionalities to the existing point-of-sale module.
- User Group Management: Includes predefined roles for salesmen and supervisors.
- **Stock location**: Introduced Stock Location used for Loading and Unloading.
- **Real-Time Stock Update in Inventory:** 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 32). This setting allows the system to check the actual stock levels instantly and prevent overselling.



3. Screenshots

Screenshot 1: Van Point of Sale - Adding Salesman or Supervisor User Groups

- Navigate to **Settings** in Odoo.
- Click on 'Activate the Developer Mode' to enable advanced features.

🗰 Settings General Settings Users & Companies Translations Technical 🔅 🧟 🕻 My Company (San Francisco			
Save Discard Sett	ings	Q Search	
🟮 General Settings	Protect your forms from spam and abuse.	Protect your forms with CF Turnstile.	
Inventory			
Invoicing	Performance		
Fleet	Enable the profiling tool, Profiling may impact performance while		
	Developer Tools		
	Activate the developer mode (with assets) Activate the developer mode (with tests assets) Deactivate the developer mode		
	About		
	Odoo 18.0 (Community Edition) Copyright © 2004 <u>Odoo S.A. GNU LGPL Licensed</u>		

- Navigate to the Users & Companies menu and select Users.
- Open the desired user profile.
- Enable the Salesman or Supervisor role.
- Click **Save** to apply the changes.

Ettings General Settings Users & Companies	🕵 7 👶 My Company (San Francisco) 👹
New Settings / Users Mitchell Admin 🕸	2/2 < >
Allowed Companies IN Company × My Company (Chicago) × My Company (San Francisco) ×	
Default Company ? My Company (San Francisco)	
SALES	ACCOUNTING
Point of Sale ? Administrator	Invoicing ? Administrator
	Bank Validate bank account
INVENTORY	HUMAN RESOURCES
Inventory [?] Administrator	Fleet Administrator
PRODUCTIVITY	ADMINISTRATION
Dashboard ? Admin	Administration Settings
OTHER Salesman	
Canned Responses Supervisor	
Van Sales Supervisor	
0	

Additional Step: Granting Supervisor Administrative Access

- After enabling the **Supervisor** role for a user, scroll down to the **Access Rights** section in the user's profile.
- Modify the Administration Access setting to provide the required level of administrative privileges (e.g., Settings or Full Access).
- Click **Save** to apply the changes.
- This step ensures the Supervisor role has appropriate administrative access to manage van sales efficiently.

E Settings General Settings Users & Companies Translations Technical		🤹 CI 🖪
New Users JP & A D	Image: State of the state	2/5 < >
Portal 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 ⁷	
VAN SALES Salesman	Supervisor	
Innicana.	заритизм	
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	
Advanced Pricelists	Allow the cash rounding management	
Analytic Accounting Delivery Address	Basic Pricelists	
Delivery Address Display Serial & Lot Number in Delivery Slips	Discount on lines	
Display Serial & Lot Number in Delivery Slips	Display Senal & Lot Number on Invoices	
Manane Different Stock Owners	Manane Lots / Serial Numbers	

Screenshot 2: Van Point of Sale - Enabling Storage Locations

- Navigate to **Settings** -> **Inventory** in Odoo.
- Locate the **Storage Locations** option.
- Check the **Enable Storage Locations** box.
- Click **Save** to apply the changes.
- This configuration allows the management of specific storage locations for van stock and inventory tracking.



Point of Sale Dast	board Orders Products Van Stock Transfer Unload Reporting Cor	nfiguration	🙊 髨 🥲 My Company (San Francisco) 😽 Mitcheil Admin 🔤 v15_pos_ven_sale_2
Save Discard Settin	gs	Q. Search	
General Settings			
inventory	Traceability		
 Invoicing Fleet Point of Sale 	Lots & Serial Numbers Get a full traceability from vendors to customers Print GS1 Barcodes for Lots & Serial Numbers Use GS1 nomentature datamatits whenever barcodes are printed for lots and serial numbers.	Expiration Dates: Set expiration dates on lots & serial numbers	
	Display Lots & Serial Numbers on Delivery Slips Lots & Serial numbers will appear on the delivery slip	Consignment @ Set owner on stored products	
	Valuation		
	Add additional cost (transport, customs,) in the value of the product.	Display Lots & Setial Numbers on Invoice Lots & Setial numbers will appear on the invoice	
	Warehouse		
	Storage Locations P Track product location in your warehouse → Locations	Multi-Step Routes Use your own routes	
	Logistics		
	Dropshipping Request your vendors to deliver to your customers		

Screenshot 3: Van Point of Sale - Locations Menu Item

- Navigate to **Inventory** in Odoo.
- Go to **Configuration** -> **Locations**.

This menu allows you to view, manage, and configure storage locations used for van sales operations.

Inventory Overview Ope	rations Products Locations Reporting	Configuration		髨 🤨 My Company (San Francisco) 🦉
Inventory Overview		Q þearch	•	1-7/7 < >
Receipts	1	Internal Transfers	Delivery Orders	Î
3 To Receive	Late 3 Operations 5	Open	5 To Deliver	Late 4 Operations 5
	Difference to the second secon			
PoS Orders		VAN SALE	VAN SALE LOAD	
Open		Open	Open	
				•



Screenshot 4: Van Point of Sale – Locations List View

The Locations List View provides a detailed summary of all storage locations. It displays:

- Location Name: Identifies each storage location.
- Location Type: Indicates whether the location is internal, external, or customer related.
- **Parent Location**: Shows the hierarchical structure of the locations.

This view simplifies the management of van stock by offering quick access to modify or update location settings.

New Locations 🖨	Q T Internal × Search	•	1-10/10 < >
Location	Location Type	Is Empty Storage Category	Company
Test VAN	Internal Location		My Company (San Francisco)
Van	Internal Location	۵	My Company (San Francisco)
WH/Input/Order Processing	Internal Location	۵	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone	Internal Location	۵	My Company (San Francisco)
WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location	۵	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/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)

Screenshot 5: Van Point of Sale – Adding a New Location

- Go to the **Inventory** module in Odoo.
- Navigate to **Configuration** -> **Locations**.
- Click **Create** to add a new location.
- Enter the required details, such as:
 - **Location Name**: Name of the new location.



- **Location Type**: Specify the type (e.g., internal, customer, supplier).
- **Parent Location**: Select the parent location if applicable.
- Click Save to complete the setup.

This process enables the creation of storage locations for managing van stock efficiently.

Inventory Overview Operations Products Locations Reporting Configu		喿 7 🥑 My Company (San Francisco) 🦉
New Locations	🔀 Putaway Rules 🗮 Products 🗞 Current Stock	
Location Name e.g. Spare Stock Parent Location ? e.g. Physical Locations		
ADDITIONAL INFORMATION	CYCLIC COUNTING	
Location Type ? Internal Location	Inventory Frequency [?] 0 day	/5
Storage Category	Last Inventory [?]	
Company ? My Company (San Francisco)	Next Expected ?	
Is a Scrap Location? ?		
Replenish Location [?]		
External note		

Screenshot 6: Van Point of Sale - Operation Types

- Go to the **Inventory** module in Odoo.
- Navigate to **Configuration** -> **Operation Types**.

This menu allows you to configure and manage different operation types, such as loading and unloading stock for van sales.



III Inventory Overview Operations Products Locations Reporting	Configuration	髨 🤨 🖓 My Company (San Francisco)
Inventory Overview	Settings	1-7/7 < >
Receipts 3 To Receive Late 3 Operations 5	Warehouse Management Warehouses Operations Types Storage Categories Putaway Rules Products Products Product Categories Attributes	Delivery Orders S To Deliver Late 4 Operations 5
PoS Orders	VAN SALE	VAN SALE LOAD
Open	Open	Open

Screenshot 7: Van Point of Sale Operation Type - VAN_SALE

- The VAN_SALE operation type is designed for transferring stock from the van to partner or customer locations.
- This operation facilitates efficient tracking and management of product sales directly from the van.

Inventory Overvi		喿 7 👶 My Company (San Francisco)
New Operations Types YourCompany: VA	N SALE 🖗	5/7 🔇 🗲
Operation Type		
VAN SALE		
General Hardwa	e	
Type of Operation	Delivery Company	My Company (San Francisco)
Reference Sequence	Van Stock Transfer Sequence Returns Type	
Sequence Prefix	VS Create Backorder ?	Ask
Reservation Method ?	• At Confirmation	
	O Manually	
	 Before scheduled date 	
LOTS/SERIAL NUMBERS	LOCATIONS	
Create New ?		Van
Use Existing ones ?	Destination Location ?	Partners/Customers



Screenshot 8: Van Point of Sale Operation Type - VAN_SALE_LOAD

- The VAN_SALE_LOAD operation type manages the transfer of stock from warehouse locations to the van before the sales process begins.
- This operation ensures that the van is properly stocked with products needed for the sales session.

Inventory Overview Operations Products Locations Reporting Configuration	🔍 7 👶 My Company (San Francisco) 👹
New Operations Types YourCompany: VAN SALE LOAD &	6/7 < >
Operation Type VAN SALE LOAD General Hardware	
Type of Operation Internal Transfer	Company My Company (San Francisco)
Reference Sequence Van Stock Transfer Sequence	Returns Type
Sequence Prefix VSL	Create Backorder 7 Ask
Reservation Method ? • • At Confirmation	Shipping Policy ? As soon as possible
Manually Before scheduled date	
LOTS/SERIAL NUMBERS	LOCATIONS
Create New ?	Source Location ⁷ WH/Stock
Use Existing ones ⁷	Destination Location ? Van

Screenshot 9: Van Point of Sale Operation Type - VAN_SALE_UNLOAD

- The VAN_SALE_UNLOAD operation type handles the transfer of unsold products from the van back to the warehouse after the sales session is completed.
- This operation ensures accurate inventory updates and proper management of returned stock.

Inventory Overview Operations Products Locations Reporting Configuration	髨 🥙 My Company (San Francisco)
New Operations Types YourCompany: VAN SALE UNLOAD 🌣	7/7 < >
Operation Type VAN SALE UNLOAD General Hardware	
Type of Operation Internal Transfer	Company My Company (San Francisco)
Reference Sequence Van Stock Transfer Sequence	Returns Type
Sequence Prefix VSU	Create Backorder * Ask
Reservation Method ⁷ • At Confirmation Manually Before scheduled date	Shipping Policy [†] As soon as possible
LOTS/SERIAL NUMBERS	LOCATIONS
Create New ?	Source Location ? Van
Use Existing ones ?	Destination Location ? WH/Stock

Screenshot 10: Create a Van in Fleet Management

- Navigate to the Fleet Management module in Odoo.
- Click on **New** to create a new van entry.
- Enter the required details:
 - **Driver**: Assign a driver for the van.
 - **Fleet Manager**: Specify the fleet manager, who will also act as the Salesman for the van.
 - Other relevant van details (e.g., license number, vehicle type).
- Click **Save** to complete the setup.

This process ensures that each van is properly linked to a driver and a fleet manager, facilitating seamless operations in the Van Sales POS workflow.



III Fleet Fleet Reporting Configuration			n na state and the state and
New Vehicles //No Plate 🌣 🕼 🕽	Drivers History		
	New Request To Order Registered Downgraded	Send message Log note Activities	Q 🍕 🕒 ° Follow
Model ? e.g. Model S		Today	
License Plate ² e.g. PAE 326	<u>.</u>	A Administrator - now Creating a new record	
Tags?			
DRIVER	VEHICLE		
Driver ?	Category ?		
Future Driver ?	Order Date [?]		
Assignment Date 7	Chassis Number ?		
	Fleet Manager ?		
	Location ?		
Tax Info Model Note			
FISCALITY Horsepower Taxation ? ₹ 0.00	CONTRACT		
Torsepower lanauori < 0.00	First Contract Date ? 08/28/2024		
	Catalog Value (VAT ₹ 0.00 Incl.) ⁷		
	Purchase Value ? ₹ 0.00		
	Residual Value ⁷ ₹ 0.00		

Screenshot 11: Create a New Point of Sale

- Go to **Settings** in Odoo.
- Navigate to **Point of Sale**.
- Click on **New Shop** to create a new POS configuration.

This step allows you to set up a new Point of Sale instance that can be tailored for van sales operations.





Screenshot 12: Enter New POS Details

- After clicking **New Shop** in the **Point of Sale** section, you will be prompted to enter details for the new POS.
- Fill in the required information, such as:
 - **POS Name**: Name for the new Point of Sale instance.
 - Other relevant details: Configure additional settings based on your business needs.
- Click **Save** to finalize the setup.

This step ensures that the new POS is correctly configured to support van sales operations.

i∰ Odoo	×
Point of Sale ? e.g. NYC Shop Is a Bar/Restaurant ?	
SAVE DISCARD	

Screenshot 13: Edit New POS

- Go to the **POS** module in Odoo.
- Locate the newly created POS.
- Click on the three-dot menu next to the POS and select **Edit**.

This allows you to make modifications or fine-tune the settings of the newly created Point of Sale instance.

Point of Sale Dashb	oard Orders Products Van Stock Tra	nsfer Unload Reporting	Configuration	
Point of Sale			Q Search	•
Shop		1	Test Shop	
New Session	Closing Balance	08/28/2024 ₹ 0.00	New Session	View Reporting Orders Orders Sessions
				Edit



Screenshot 14: Configure New POS to Van Sale POS

- In the **Edit POS** screen, enable the **Is Van POS** checkbox to configure the POS as a Van Sale POS.
- Add a **van** to the POS setup.
- Add the operation types of VAN_SALE, VAN_SALE_LOAD, and VAN_SALE_UN-LOAD to the POS configuration.
- Add Stock Location used for Loading and Unloading
- Click **Save** to apply for the changes.
- This configuration tailors the POS system for van sales operations, ensuring that the necessary operation types are linked to efficient stock management and sales tracking.

III Point of Sale Dashboard Orders Product	s Van Stock Transfer Unload Reporting Configuration		🕵 🙆 My Company (San Francisco) 🦉
Point of Sale	Odoo	×	1-1/1 < > 📭 🔳
Test VAN	Point of Sale ' Test VAN		
Open Register Closing Balance	A session is currently opened for this PoS. Some settings can only be changed after the session is closed. Click here to close the session		
	Log in with Employees ⁷ Allow to log and switch between selected Employees Connect device to your PoS without an IoT Box		
	Is VAN POS Operation Type Supervisor Mitchell Admin Van Volkswagert/Golf 8, Salesman Salesperson		
	Operation Type(Load) Operation Type(Unload) Operation type used to record product load pickings Operation type used to record product unload pickings YourCompany: VAN SALE YourCompany: VAN SALE		
	Stock Location IoT Box Stock Location used for Loading and Unloading Connect devices using an IoT Box Test VAN Test VAN		
	Save Discard		



Screenshot 15: Van Point of Sale - Validation displayed if same Van is configured to more than one POS

- Add a new Shop
- In the **Edit POS** screen, enable the **Is Van POS** checkbox to configure the POS as a Van Sale POS.
- Add an already configured **van** to the POS setup.
- Add the operation types of VAN_SALE, VAN_SALE_LOAD, and VAN_SALE_UN-LOAD to the POS configuration.
- Add Stock Location used for Loading and Unloading
- Click **Save** to apply for the changes.

III Point of Sale Dashboard Orders Products Van Stock Tra				
Point of Sale		-		4 < > 📭 🔳
Test Shop	Odoo		×	
Continue Selling Closing Balance	Point of Sale 7 Van Sale			
	Log in with Employees ² Allow to log and switch between selected Employees	ePos Printer ² Connect device to your PoS without an IoT Box		5
Van Sale 2		Operation Type		
	idation Error DS Stock Location 'Van Sale 1' is already assigned to another POS configuration	1. Please select a different location.	×	
	YourCompany: VAN SALE	YourCompany: VAN SALE		
	Stock Location Stock Location used for Loading and Unloading Van Sale 1 More settings: Configurations > Settings	Connect devices using an IoT Box		
	Save Discard			

Screenshot 16: Van Point of Sale - Van Stock Transfer Load

- Go to the **Inventory** module in Odoo.
- Navigate to the **Operations** menu and select the **Van Stock Transfer** menu item.
- This process is defined under the operation type: VAN_SALE_LOAD.
- Ensure that the van is loaded with products before opening the related POS session.



This process ensures that all necessary products are transferred to the van before beginning the sales session.

Inventory Overview O	Operations Products Lo		Configuration		喿 7 🔮 My Company (San Francisco) 🔤
Inventory Overview	Transfers Receipts		Q Search		1-7/7 < >
Receipts 3 To Receive	Physical Inventory Scrap	3 tions 5	Internal Transfers Open	Delivery Orders 5 To Deliver	Late 4 Operations 5
	Procurement Replenishment Van Stock Transfer Load				
PoS Orders Open			VAN SALE Open	VAN SALE LOAD	

Screenshot 17: Van Point of Sale – Create Van Stock Transfer Load

- Select the **POS** associated with the van sales.
- Add the **products** to the van that need to be loaded for the sales session.
- Click Initiate Transfer to start the stock transfer process.

This step ensures that the selected products are transferred from the warehouse to the van for the sales session.

Inventory Overview Operations Products Locations Reporting Configuration	喿 7 🔮 My Company (San Francisco) 🐻
New LOAD/TRANS/006 🚭	1/6 < >
Initiate Transfer Cancel	Draft Waiting Loaded Approved
LOAD/TRANS/006	
Company My Company (San Francisco) Picking Type Load	
Point of Sale Test VAN Date 01/07/2025 12:44:06	
Supervisor Mitchell Admin	
VAN DETAILS	
Van Volkswagen/Golf 8/1-AUD-001	
Salesman Mitchell Admin	
Operations Other Informations	
Product	Demand Done
[E-COM09] Large Desk	2.00 0.00 💼
Add a line	
	*

Screenshot 18: Insufficient Stock Validation During Van Stock Transfer

- If there is insufficient stock for a product, the system will prevent initiating the transfer. It will raise a validation error to indicate the lack of stock.
- While initiating the transfer, if the available stock is less than the required amount, the system will display an error message, preventing the transfer from proceeding.

				an Francisco) 📲
New Van Sales Stock Transfer LOAD/TRANS/007				1/1 < >
Initiate Transfer Cancel			Draft Waiting Loaded	Approved
LOAD/TRANS/007				
Company My Company	(San Francisco)	Picking Type Load		
Point of Sale Test VAN		Date 01/07/2025 12:49:24		
Supervisor Mitchell Ad	Validation Error		×	
VAN DETAILS	Insufficient stock for product Large Desk. Please adjust the quantitie	s or restock the product before creating the transfer.		
Van Volkswagen/Ge				
Salesman Mitchell Admir	Close			
Operations Other Info	mations			
Product			Demand	Done
[E-COM09] Large Desk			2.00	0.00 🗃
Add a line				

This ensures that stock transfers are only initiated when sufficient inventory is available.



Screenshot 19: Van Point of Sale – View the Created Transfer

If there is sufficient stock, the transfer will be initiated successfully. You can view the created transfer in the system.

- After initiating the transfer, if the stock is available, the system will show the created transfer details.
- The transfer will be marked as **initiated** and ready for approval or validation.

This step ensures that only valid stock transfers are processed, and the details of the transfer can be monitored.

Inventory Overview Operations Products Locations Reporting Configuration	≪ ⁹ € ² м	y Company (San Francisco) 🛛 😽
New Van Sales Stock Transfer LOAD/TRANS/019 4	ransfers 1	1/1 < >
Approve Reject Cancel	Draft Waiting Loaded Approv	ed
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/019		
Company My Company (San Francisco)	Picking Type Load	
Point of Sale Test VAN	Date 01/08/2025 11:31:34	
Supervisor Mitchell Admin		
VAN DETAILS		
Van Volkswagen/Golf 8/1-AUD-001		
Salesman Salesperson		
Operations Other Informations		
Product	Demand Do	ne
[E-COM09] Large Desk	2.00 0.	00

Screenshot 20: Van Point of Sale – Logged in as a Salesman

When logged in as a **salesman**, you will not have the permission to validate the transfer.

- If you are logged in as a salesman, you can view the transfer but cannot approve or validate it.
- To validate the transfer, you need to contact your **supervisor** who has the necessary permission to approve the transfer. If you are logged in as salesman, you cannot validate the transfer.

This ensures that only authorized personnel (supervisors) can validate the stock transfer, maintaining proper oversight.

Inventory Overview Operations Products Locations Reporting Configuration		喿 🛛 My Company (San Franci:	sco) <mark>S</mark>
New Van Sales Stock Transfer LOAD/TRANS/007 ©	Transfers	1/7	< >
Cancel		Draft Waiting Loaded Appro	oved
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/007			
Company My Company (San Francisco)	Picking Type Load		
Point of Sale Test VAN Supervisor Mitchell Ad You can not Validate the Transfer. Please contact to your Supervisior to Valida	ate the Transfer	×	
Van DETAILS Van Volkswagen/G			
Salesman Salesperson			
Operations Other Informations			
Product		Demand D	one
[E-COM08] Storage Box		2.00	2.00

• Each **salesman** can only view their own records within the system. They will not have access to transfers or data related to other salesmen.

This ensures data privacy and prevents cross-access between different sales representatives.

Date Reference Picking Type Point of Sale Supervisor Van Salesman Status 01/07/2025 12:49:24 LOAD/TRANS/007 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Approved 01/07/2025 12:49:24 LOAD/TRANS/006 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed 01/07/2025 12:49:24 LOAD/TRANS/005 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed 01/07/2025 12:49:44 UNLOAD/TRANS/004 Unload Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed	ed ed
01/07/2025 12:44:06 LOAD/TRANS/006 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson 01/07/2025 12:30:33 LOAD/TRANS/005 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson	ed ed
01/07/2025 12:30:33 LOAD/TRANS/005 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson	ed
01/07/2025 11:48:44 UNLOAD/TRANS/004 Unload Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed	
	ed
01/07/2025 11:46:54 LOAD/TRANS/003 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed	ed
01/07/2025 11:41:26 LOAD/TRANS/002 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson Completed	ed
01/06/2025 12:24:51 LOAD/TRANS/001 Load Test VAN Mitchell Admin Volkswagen/Golf 8/1-AUD-001 Salesperson	ed



Screenshot 21: Van Point of Sale – Validate Transfer

- Only a **supervisor** has the authority to validate the transfer.
- The **supervisor** can review the transfer details and click on **Validate** to approve the transfer.
- Salesmen will not have the option to validate transfers.

This ensures that transfers are properly authorized and managed by a supervisor, maintaining control over stock movements.

Inventory Overview Operations Products Locations Reporting C	Configuration		髨 🛃 му С	Company (San Francisco) 🛛 😽
New / LOAD/TRANS/246 / Transfers /STOCK_TRANS/300 &		Moves		1/1 < >
Validate Print Return Cancel		Draft Waiting Ready Done	Send message Log note Activities	Q 🗞 👌 Following
Contact e.g. Lumber Inc Operation Type VourCompany: VAN SALE LOAD Source Location VH/Stock Destination Location Test VAN Operations Additional Info Note	Scheduled Date [†] 02/06/2025 Source Document [†] e.g. PO0032		Today Mitchell Admin Today at 1636 Transfer created	
Product	Demand	Quantity +		
[E-COM10] Pedal Bin	2.00 📠	2.00 🔳 🔒		
Add a line				
Note: Adding new products or removing existing products from the Operations POS.	s or Detailed Operations tab will impact th	e load/unload operations in the Van Sales		

Screenshot 22: Van Point of Sale – Reject or Cancel Transfer

Before the transfer is approved, you can choose to reject or cancel the transfer. However, once the transfer is validated, it cannot be rejected or cancelled and attempting to do so will raise a validation error.

- Go back to the **Load Transfer** record.
- Click on **Reject and Cancel** to reverse the transfer if needed before validation.
- Once the transfer is validated, the **Reject and Cancel** option will be disabled, and any attempt to cancel will raise an error.

This ensures that transfers cannot be undone once they are validated, maintaining accurate records of stock movements.

					n Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/011	→ Transfers				1/1 < >
Approve Reject Cancel		Draft	Waiting	Loaded	Approved
Validate the Transfer(s) LOAD/TRANS/011 Company My Company (Point of Sale Test VAN Supervisor Mitchell Ad VAN DETAILS Van Volkswagen/G Salesman Salesperson	to approve this Van stock transfer San Francisco) Picking Type Load Validation Error You cannot reject a transfer in 'Done' state. To proceed, click on the Transfers smart button, and create a return for the transfer /STOCK_TRANS/019. Close		×		
Operations Other Infor	mations				
Product			[Demand	Done
[E-COM07] Large Cabinet				2.00	2.00
Inventory Overview C	perations Products Locations Reporting Configuration	۰	C ² My C	ompany (Sar	n Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/011	₹ Transfers				1/1 < >
Approve Reject Cancel		Draft	Waiting	Loaded	Approved
Validate the Transfer(s) LOAD/TRANS/011 Company My Company (to approve this Van stock transfer San Francisco) Picking Type Load				
Point of Sale Test VAN Supervisor Mitchell Ad VAN DETAILS Van Volkswagen/G	Validation Error You cannot cancel a transfer in 'Done' state. To proceed, click on the Transfers smart button, and create a return for the transfer /STOCK_TRANS/019.		×		
Salesman Salesperson Operations Other Infor	mations				
Product			[Demand	Done
[E-COM07] Large Cabinet				2.00	2.00

Screenshot 23: Van Point of Sale - Create Return for Rejected Transfer

If a transfer is rejected and you need to return the stock to the warehouse, you can create a return process to move the products back.

- Click on the **Transfers** smart button.
- Navigate to **Transfers** to view and manage the return process.

This allows the stock to be returned to the warehouse and ensures inventory records are updated accordingly.



Inventory Overview Operations Products Locations Reporting Configuration		髨 ⁸ 🕑 My Company (Sa	n Francisco) 🦉
New Van Sales Stock Transfer LOAD/TRANS/011 🕏	\rightarrow 1 Transfers		1/11 < >
		Draft Waiting Loaded	Approved
LOAD/TRANS/011			
Company My Company (San Francisco)	Picking Type Load		
Point of Sale Test VAN	Date 01/07/2025 14:59:12		
Supervisor Mitchell Admin			
Pos Session			
VAN DETAILS			
Van Volkswagen/Golf 8/1-AUD-001			
Salesman Salesperson			
Operations Other Informations			
Product		Demand	Done
[E-COM07] Large Cabinet		2.00	2.00

Screenshot 24: Van Point of Sale - Create Return

- After navigating to **Transfers**, click on the **Return** button.
- This will initiate the return process to move the rejected or canceled products back to the warehouse.

This ensures that products are properly returned, and inventory is accurately updated.

Inventory Overview Operations Products Locations Reporting Co			🔩 🕑 M	y Company (San Francisco) 🛛 🍯
New / LOAD/TRANS/249 / Transfers /STOCK_TRANS/303 0	≡ Moves \$ \	aluation		1/1 < >
Print Return	Draft	Waiting Ready Done	Send message Log note Activities	Q 🗞 👌 Following
Contact Operation Type YourCompany: VAN SALE LOAD Source Location WH/Stock Destination Location Test VAN Operations Additional Info Note	Scheduled Date ⁷ 02/06/2025 16:47:38 Effective Date ⁷ 02/06/2025 16:48:57 Source Document ⁷		Mitchell Admin Today at 1648 • Ready → Done (Status) Mitchell Admin Today at 1648 Transfer created	
Product	Demand Quanti	y 🚅		
[E-COM07] Large Cabinet	2.00 🖿 2.0	0 🔳		
Note: Adding new products or removing existing products from the Operations POS.	or Detailed Operations tab will impact the load/unload i	sperations in the Van Sales		



Screenshot 25: Van Point of Sale – Validate the Return

Once the return is created, you need to validate it to update the stock in the warehouse.

- After clicking **Return**, validate the return to move the stock back to the warehouse.
- Once validated, the products will be returned to the warehouse inventory, and stock levels will be updated accordingly.

This step ensures that the returned products are properly accounted for, and the inventory is synchronized.

Inventory Overview Operations Products Locations Reporting C			🔍 🛛 🥵 🥵 🥵 😒 🥵
New / Transfers / /STOCK_TRANS/305 /STOCK_TRANS/306 🏟		Moves	1/1 < >
Validate Print Return Cancel		Draft Waiting Ready Done	Send message Log note Activities Q 🗞 👌 Following
☆ /STOCK_TRANS/306			Today Mitchell Admin Today at 1653 Waiting Another Operation
Contact e.g. Lumber Inc Operation Type YourCompany: VAN SALE LOAD		2025 16:53:20 of /STOCK_TRANS/305	Waiting Another Operation → Ready (Status) Mitchell Admin Scary #1653 This transfer has been created from: /STOCK_TRANS/305
Source Location Test VAN Destination Location WH/Stock			Mitchell Admin Today at 16:53 Transfer created
Operations Additional Info Note			
Product	Demand	Quantity +	
[E-COM10] Pedal Bin	1.00 🕍	1.00 🔳 🗎	
Add a line			
Note: Adding new products or removing existing products from the Operation:	; or Detailed Operations tab will imp	act the load/unload operations in the Van Sales	
POS.			

Screenshot 26: Van Point of Sale – Load Transfer Approval

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

This ensures that the load transfer is validated by an authorized person (supervisor), maintaining control over inventory movements.

Inventory Overview Operations Products Locations Reporting Configuration		i≇ 梨 😋		Mitchell Admin	n 8-testing
New Van Sales Stock Transfer LOAD/TRANS/014 🏘	→ Transfers 1			1/1	< >
Approve Reject Cancel			Draft Waiting	Loaded Appro	oved
Validate the Transfer(s) to approve this Van stock transfer LOAD/TRANS/014					
Company ⁷ My Company (San Francisco)	Picking Type ? Load				
Point of Sale 7 Test VAN	Date ? 01/07/2025 15:24:43				
Supervisor ? Mitchell Admin					
VAN DETAILS					
Van ? Volkswagen/Golf 8/1-AUD-001					
Salesman ? Salesperson					
Operations Other Informations					
Product			C	emand D	Done
[E-COM07] Large Cabinet				2.00	2.00

Screenshot 27: Van Point of Sale – Van Stock Transfer Load Approval

Once the **Van Stock Transfer Load** is approved, you cannot create another transfer load for the same session. Attempting to do so will raise a validation error.

- After approving the transfer, any new stock transfer load for the same session will not be allowed.
- You must complete the previous load before initiating a new transfer.

This ensures that each load is properly processed before a new one can begin, maintaining an organized and accurate stock transfer process.

Inventory Overview Operations Products Locations Reporting Configuration	★ 🔩 🧔 ² My Company (San Francisco) 👹 Mitchell Admin ■van-sale18-testing
New LOAD/TRANS/015 ©	1/1 < >
Initiate Transfer Cancel	Draft Waiting Loaded Approved
LOAD/TRANS/015	
Company ² My Company (San Francisco) Picking Type ⁷ Load	
Point of Sale ? Test VAN Date ? 01/07/2025 15:26:11	
Supervisor ¹ Mitchell J Validation Error	×
VAN DETAILS LOAD/TRANS/014 is in approve state. Complete the same and approve the next transfer.	
Van ⁷ Volkswagen/	
Salesman ² Salesperson	
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

- 1. Go to the **Point of Sale** module.
- 2. Select the Van POS that has been configured for the sales session.
- 3. Click on **Open Session** to begin the new POS session.

This step starts the new sales session for van operations, allowing transactions to be processed for the day.



Point of Sale Dashboard	Orders Products Van Stock 1	fransfer Unload Reporting	Configuration			¥ 🔍 ² Ο A Administrator ∎ 17_pos_van
Point of Sale			Q Search	•		1-3/3 < > ■
Shop		:	Test Shop	1	Test Shop1	1
New Session	Closing Balance	08/28/2024 ₹ 0.00	Continue Selling		New Session	
				A		

Screenshot 29: Van Point of Sale – POS Open Control

When opening the POS, the system prompts for an **Opening Note**. This is an optional field where users can enter additional details about the session or leave it blank.

- When opening the POS session, a prompt will appear asking for an **Opening Note**.
- Users can either input a note or leave the field empty.
- Click on **Open Register** to proceed with the session.

This allows flexibility in managing the session, with the option to add notes for reference or reporting.

O 401	odoo	Q Search products	🛄 🐻 Mitchell Admin 🚍
	Breads Chairs Desks Pastries Pastries Upper body	Lower body	Misc Others
	pening Control		
	vld an opening note		
	Open Register Discard	-	
Customer Internal Note Action	5		

Screenshot 30: Van Point of Sale - Sell the Loaded Products

- In the POS interface, only **Van Location Products** will be visible, representing the products loaded onto the van.
- Click on the desired **product** to add it to the cart.
- Once the products are added, click on **Payment** to proceed with the transaction.

This ensures that only the products available on the van are sold during the session, maintaining accurate inventory control.

O 701					odoo	Q Search products	in
Test Product 1.00 x ₹ 1.0	6 / Units		₹1.06	Test Product			
Taxes Total			₹ 0.06 ₹ 1.06				
Customer	Internal Note		Actions				
1	2	3	Qty				
4	5	6	%				
7	8	9	Price				
+/-	0		8				
	Payn	nent					



Screenshot 31: Van Point of Sale – Validation for Negative or Zero Quantity

- In the POS interface, only **Van Location Products** will be visible, representing the products loaded onto the van.
- Click on the desired **product** to add it to the cart and click on (+/-) symbol to add negative quantity.
- Once the products are added, click on **Payment** to proceed with the transaction.

This ensures that Negative quantity is not allowed in Van Sale POS and validation message is raised.

O 901					odoo		Q Search products	 🗑 Mitchell Admin	≡
Cabinet with I -8.00 × र 14			₹ -1,120.00	Cabinet with Doors	Validation Error	×			
					Negative or zero quantity are not				
Total		1	₹ -1,120.00		supported. Please enter a valid quantity	6			
Customer	Internal Note		Actions		Ok				
1	2	3	Qty		_				
4	5	6	%		•				
7	8	9	Price						
+/-	0		∞						
	Payn	nent							

Screenshot 32: Van Point of Sale – For Real-Time Stock Update

- Activate Developer Mode in Odoo.
- Go to the **POS** module.
- Click on the **Configuration** menu.
- Select the **Settings** menu.
- Under the settings, choose the **In real time** option for accurate stock updates.



This option ensures that stock levels are updated in real time, reflecting changes immediately, although it may slightly impact performance.

Point of Sale Dashbo	oard Orders Products Van Stock T	ranster Unioad Keporting	g Configuration					🔍 🛛
Point of Sale			Settings Payment Methods		•			1-4/4 < >
Shop		1	Coins/Bills		1	Test Shop1		1
			Point of Sales Products					
New Session	Closing Balance	08/28/2024 ₹ 0.00	PoS Product Categori	es		Continue Selling	Closing	09/02/2024
	balance	10.00	Taxes					A
M SHOP		1						
New Session	Closing	08/30/2024						
New Session								
Point of Sale Dash	hboard Orders Products Van S	stock Transfer Unload	Reporting Configuration				¥ 🕵 ⁶ (6.4	My Company (San Francis
	hboard Orders Products Van S	Stock Transfer Unload I					¥ €6 €4	My Company (San Francisc
	ngs		Reporting Configuration	:h			πે ጫ ⁶ €4	My Company (San Francis
Save Discard Settin				ch Show checkout to customers through a seco	nd display		¥ € ⁶ Ç ⁴	My Company (San Francis
Save Discard Settin	ngs			h Show checkout to customers through a seco The same device •			¥ € ⁶ Ç ⁴	My Company (San Francis
Save Discard Settin General Settings Inventory	ngs			ch Show checkout to customers through a seco	nd display		¥ 🕵 Ç ⁴	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing	ngs Connect device to your P			ch	nd display		ά € ⁶ ζ ⁴	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	ngs	oS without an IoT Box		ch	and display		<u>*</u> ه ^د ر۰	My Company (San Francis
Save Discard Setting General Settings Inventory Fleet	ngs Connect device to your P	oS without an IoT Box		ch	and display		<u>غ</u> هرد ري	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	ngs Connect device to your P	oS without an IoT Box		ch	and display		ά € ⁶ ζ ⁴	My Company (San Francis
Save Discard Setting General Settings Inventory Fleet	ngs Connect device to your P IoT Box Connect devices using ar Preparation	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device • Background Image Upload your file			± € ⁶ ζ ⁴	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	ngs Connect device to your P loT Box Connect devices using an	oS without an IoT Box	Q jean	ch	ind display		≭ € ⁶ ζ ⁴	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	Ings Connect device to your P Connect device to your P Connect devices using an Preparation Preparation Printers Print orders at the kitche Internal Notes	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>َه</u> هو ⁰ روم	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	Ings Connect device to your P Connect device to your P Connect devices using an Preparation Preparation Printers Print orders at the kitche Internal Notes Add internal Notes on on	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>ب</u> هو ⁰ روم	My Company (San Francis
Save Discard Setting General Settings Inventory Fleet	INTERPORT DE LA CONNECT DE VOUR FORMANTE DE LA CONNECT DE VOUR FORMANTE DE LA CONNECTIÓN DE LA CONNECTIÓN DE LA CONTRUER A CONTRUER A CONTRUE A CO	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>َه</u> هو ⁰ روم	My Company (San Francis
Save Discard Setting General Settings Inventory Fleet	Ings Connect device to your P Connect device to your P Connect devices using an Preparation Preparation Printers Print orders at the kitche Internal Notes Add internal Notes on on	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>َه</u> هو ⁰ روم	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Invoicing Fleet	INTERPORT DE LA CONNECT DE VOUR FORMANTE DE LA CONNECT DE VOUR FORMANTE DE LA CONNECTIÓN DE LA CONNECTIÓN DE LA CONTRUER A CONTRUER A CONTRUE A CO	oS without an IoT Box	Q jean	h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>ب</u> هر ⁰ رد	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Invoicing Fleet	ngs Connect device to your F OT Box Connect devices using ar Preparation Preparation Printers Preparation Printers Print orders at the kitche Internal Notes Add internal notes on on Note Models → Notes	oS without an IoT Box	Q jean	AL. Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display Display orders on the preparation display			<u>ب</u> هر ⁰ رد	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Invoicing Fleet	ngs Connect device to your F OT Box Connect devices using ar Connect devices using ar Preparation Preparation Printers Print orders at the kitche Internal Notes Add internal notes on on Note Models → Notes Inventory Used to record product p Used to record product p	vS without an IoT Box		h Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display			<u>ب</u> هر ⁰ رد	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Invoicing Fleet	ngs Connect device to your F OT Box Connect devices using ar Connect devices using ar Preparation Preparation Printers Preparation Printers Add internal notes on on Note Models → Notes Inventory Used to record product p Used to record product p default source location.	oS without an IoT Box		AL			<u>ب</u> هر ⁰ رد ا	My Company (San Francis
	ngs Connect device to your F OT Box Connect devices using ar Connect devices using ar Preparation Preparation Printers Print orders at the kitche Internal Notes Add internal notes on on Note Models → Notes Inventory Used to record product p Used to record product p	oS without an IoT Box		AL			<u>ب</u> هر ⁰ رد ا	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	ngs Connect device to your P IoT Box Connect devices using an Preparation Preparation Printers Print orders at the kitche Add Internal notes Add Internal Notes Add Internal Notes Internal Notes Operation Type Used to record product p default source location YourCompany: VAN SAL	oS without an IoT Box		AL. Show checkout to customers through a seco The same device • Background Image Upload your file Preparation Display Display orders on the preparation display Allow Ship Later Sell products and deliver them later. Inventory Management			* • ⁶ (*	My Company (San Francis
Save Discard Settin General Settings Inventory Invoicing Fleet	ngs Connect device to your F OT Box Connect devices using ar Connect devices using ar Preparation Preparation Printers Preparation Printers Add internal notes on on Note Models → Notes Inventory Used to record product p Used to record product p default source location.	os without an IoT Box I IoT Box I IoT Box In at the bar, etc. der lines for the kitchen bickings. Products are cor	nsumed from its	AL. Show checkout to customers through a seco The same device Background Image Upload your file Preparation Display Display orders on the preparation display Allow Ship Later Sell products and deliver them later. Inventory Management Update quantities in stock			* • • C4	My Company (San Francisc
Save Discard Setting General Settings Inventory Fleet	ngs Connect device to your F Connect device to your F Connect devices using an Connect devices using an Preparation Preparation Printers Print orders at the kitche Add internal Notes Add internal Notes Add internal Notes Add internal Notes Used to record product f default source location. YourCompany: VAN SALI Barcodes 0 Use barcodes to scan pro	os without an IoT Box I IoT Box I IoT Box In at the bar, etc. der lines for the kitchen bickings. Products are cor	nsumed from its	AL. Show checkout to customers through a seco The same device • Background Image Upload your file Preparation Display Display orders on the preparation display Allow Ship Later Sell products and deliver them later. Inventory Management			* * ⁰ C ⁴	My Company (San Franci



Screenshot 33: Van Point of Sale – Sell the Loaded Products

The system will not allow you to sell more than the available quantity in stock.

• If you attempt to sell a quantity exceeding what is available in the van, the system will display an error message, preventing the transaction.

This feature ensures that sales transactions are consistent with the available inventory, preventing overselling.



Screenshot 34: Van Point of Sale – Sell the Loaded Products

- Select a payment method (e.g., Bank or Cash) for the transaction.
- After selecting the payment method, click Validate Payment to complete the sale.

This step ensures that the payment is processed, and the transaction is finalized.



odoo						🔥 Administrator 🔹 🚍
« Back						
Payment method	nod Remaining ₹ 0.00				Change ₹ 0.00	≜ kk
🚌 j Bank		Total Due ₹ 10.50				1 Invoice
Summary						
Bank	10.50	1	2	3	+10	
		4	5	5 6	+20	
		. 7.	8	9	+50	
		+/-	0		02	
> Validate		τ/-	U		1.0	

Screenshot 35: Van Point of Sale – Stock Update After Selling All Loaded Products

Once all the loaded products are sold, the stock will be updated in real time.

- After completing the sale of all loaded items, the product screen will show **blank** or **out of stock** because all the items have been sold.
- The stock levels will be updated immediately to reflect the changes in inventory.

This ensures accurate tracking of product availability and prevents overselling.



O 701	odoo	Q Search products	ittchell Admin	≡
	There are no products in this category.			
Ì				
8 − 6 Start adding products				
Customer Internal Note Actions				

Screenshot 36: Van Point of Sale - Closing the Session After Selling All Loaded Products

When all loaded products have been sold, there is no need to create an **Unload** transfer. You can simply close the session, and the stock will be automatically updated.

- Once all products are sold, click **Close Session**.
- The stock will be automatically updated without requiring an unload process.

This feature streamlines the process and ensures that the inventory is updated without the need for additional actions when all items are sold.

pits

○ 701	odoo	Q Search products	S Mitchell Admin
Start adding products	There are no products in this cotegory		Cash In/Out Cash In/Out Cash In/Out Create Product Backend Cose Register Debug Window
Customer Internal Note Actions			

odoo							Admi	inistrator	• =
		₹ 10.50							
Payment Successful							ia Your lo	go	
	🔒 Print Receipt						My Company Served by Administra	itor	
kk@gmail.com	Closing Session			Total 1 orders: て 10.50	4	Test Produc	101		₹ 10.50
	Payment Method Bank	Expected Coun ₹ 10.50 10	ted 1.50 ¥	Difference ₹0.00		10.00 Unit	s x ₹ 1.06 / Units TOTAL		₹ 10.50
	Closing note Add a closing note					Bank Tax SGST2.5%	CHANGE Amount 0.25	Base 10.00	10.50 ₹ 0.00 Total 10.25
	Close Session Discard		_	Daily Sale 📥		CGST2.5%	0.25	10.00 10.00	10.25 10.50
							Order 00011-001-00 06/29/2024 13535		
	> New Order								



Screenshot 37: Van Point of Sale – Unload Transfer to Move Unsold Products to Warehouse

- Go to the **Point of Sale** module in Odoo.
- Click on Van Stock Transfer Unload to initiate the transfer of unsold products back to the warehouse.

This process ensures that unsold inventory is returned to the warehouse and stock levels are updated accordingly.

Point of Sale Dashboard O	rders Products Van Stock T	ransfer Unload Reporting	Configuration				🔍 🛛 🚺
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		Continue Selling	Closing	08/29/2024
				A			A

Screenshot 38: Van point of sale - Create an unload transfer

- Create a **new unload transfer** to return unsold products to the warehouse.
- Select the **POS** associated with the van sales session.
 - Unsold products will be automatically updated based on the remaining quantity in the van.
- Click **INITIATE TRANSFER** to start the unloading process.



This step ensures that unsold products are efficiently transferred back to the warehouse, and inventory is updated in real time.

Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reportin	g Configuration			🧟 O 🖪
New Van Sales Stock Transfer UNLOAD/TRANS/020 🌣				1/1 < >
Initiate Transfer Cancel		Draft Waiting Loaded Approved	Send message Log note	Q 🗞 ≙ ¹ Following
UNLOAD/TRANS/020				Today
Company My Company	Picking Type Unload		Administrator - now	,
Point of Sale Test Shop1 (Administrator)	Date 08/29/2024 13:58:54		A van.stock.transfer created	
Supervisor Administrator	Can Approve			
	Can View 🛛			
	Can Cancel 🗹			
VAN DETAILS				
Van Audi/A1/BR092583				
Salesman kk				
Operations Other Informations				
Product	Demand	Done		
Test Product	5.00	0.00 🖨		
Add a line				

Screenshot 39: Van Point of Sale – If logged in as Salesman

If you are logged in as a **salesman**, you will not have the ability to validate the transfer.

- As a salesman, you cannot validate the **unload transfer**.
- To validate the transfer, you need to contact your **supervisor**, who has the necessary permission to approve it.

This ensures that only authorized personnel (supervisors) can validate stock transfers, maintaining proper control over inventory movements.

III Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reporting	Configuration		🔍 0 🚺
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 Rott of Sale Test Shop (not used) Supervice Administrator VAN DETALE Test Shop (not used) Van Audu/AJ/RB09 Salemany Supervice Other Informations Product Test Shop (not used) Test Sale Salemany	Picking Type Unlead Date 09/10/2024 12:57:46	AP now Forat - Loaded (Status) AP now van.stocktransfer.created	Q ♥ B ¹ Following

• Each **salesman** can only view their own **unload records**. They will not have access to the unload records of other salesmen.

This ensures data privacy and helps maintain accurate records specific to each salesperson.

	er O	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/BR09	JP	Loaded
09/05/2024 13:48:14	LOAD/TRANS/111	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	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/A3/8R09	JP	Completed
09/05/2024 13:18:49	LOAD/TRANS/094	Load	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Completed
09/05/2024 12:31:59	UNLOAD/TRANS/093	Unload	Test Shop (not used)	Administrator	Audi/A3/8R09	JP	Completed
08/28/2024 18:58:48	LOAD/TRANS/016	Load	Test Shop (not used)	Administrator	Audi/A3/BR09	JP	Completed



Screenshot 40: Van Point of Sale – Validate Product Transfer

Only a **supervisor** has the authority to validate the product transfer.

- The **supervisor** can review the transfer details and click **Validate** to approve the transfer.
- Salesmen will not be able to validate the transfer.

This ensures that the product transfer is properly authorized and managed by a supervisor.

Here Point of Sale Dashboard Orders Products Van Stock	Transfer Unload Reporting Conf	iguration		🤹 🕫	My Company (San Francisco) 🛛 😽
New / UNLOAD/TRANS/257 / Transfers /STOCK_TRANS/308 &		Moves			1/1 < >
Validate Print Return Cancel		Draft Waiting	Ready Done Send m	Log note Activities	Q 🗞 👌 Following
☆ /STOCK_TRANS/308	C⊋			Today	
Contact e.g. Lumber Inc	Scheduled Date	° 02/06/2025 16:59:19		ansfer created	
Operation Type YourCompany: VAN SALE UNLOAD	Source Docum	e.g. PO0032			
Source Location Test VAN					
Destination Location WH/Stock					
Operations Additional Info Note					
Product	Demand	Quantity	÷		
Test Product	5.00 🕍	5.00	ê		
Add a line					
Note: Adding new products or removing existing products from	the Operations or Detailed Operation	ns tab will impact the load/unload operations i	n the Van Sales		
POS.					
Note: Adding new products or removing existing products from POS.	the Operations or Detailed Operatic	ns tab will impact the load/unload operations in	n the Van Sales		

Screenshot 41: Van Point of Sale – Approve Unload Transfer

Only a **supervisor** can approve the unload transfer to complete the process.

- The **supervisor** must review the unload transfer and click **Approve** to finalize the transfer of unsold products back to the warehouse.
- Salesmen do not have permission to approve the transfer.

This ensures that the unloading process is overseen and authorized by a supervisor.



III Point of Sale Dashboard Orders Products Van Stock Transfer Unload Reporting Configuration			* 🕫	6 ⁸ My Company (San Francisco)	Michell J
Naw Van Sales Stock Transfer UNLCAD/TRANS/183 Φ	Transfers 1				1/1 <
Approve		Draft Walting Loaded	Approved		
Validate the Transfer(s) to approve this Van stock transfer UNLOAD/TRANS/183					
Company ? My Company (San Francisco)	Picking Type ? Unload				
Point of Sale ⁷ Van Sale	Date ? 01/23/2025 11:35:23				
Supervisor ? Mitchell Admin	l≱				
VAN DETAILS					
Van ⁷ Volkswager//Golf 8/VanSale2Vehicle					
Salesman 7 VanSale2FleetManager					
Operations Other Informations					
Product		Demand	Done		
[E-COM07] Large Cabinet		5.00	5.00		

Screenshot 42: Van Point of Sale – Close Session

- Click 'Close' in the POS terminal to begin the session closure process.
- Rectify any cash differences that may have occurred during the sales session.
- After resolving discrepancies, click **Close Session** to finalize the session and update the inventory.

This process ensures that all sales transactions are completed, cash differences are addressed, and the session is properly closed.

0	00	oot		🗑 Mitchell Admin 🛛 🚍
	Closing Register	1 orders: ₹ 2.10	a Your logo	
Paymen t 2.10 OPrint	Cash Opening > Cash In / Out Counted Difference	₹ 0.00 ₹ 0.00 + ₹ 0.00 ₹ 0.00 ₹ 0.00	Ter + 1 555-5555 Intrody our company com http://www.seample.com Serves by Mitchel Admin 801	
eg.john.doe∯mäl.com	Card Counted Difference Customer Account Counted Difference	₹ 2.10 ₹ 2.00 ₹ 0.00 ₹ 1.06 / Units ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 0.00 ₹ 0.00		₹2.10 ₹2.00
	Cash Count 0	7 0.00 IT 5 on 7 2.00 IT 5 on 7 2.00 		₹0.05 ₹0.05 ₹2.10 ₹2.10
	Card Count 2.10 Closing note	K KSN Code TP123		5 GST 10.05
	Add a closing note Close Register Discard Cash In/Out	Daily Sale 🕹	Christer 20018-201-2001 11/176/2024 12:3032	
Nev	v Order			



4. Brief Description

This module introduces new features to the Point-of-Sale system tailored for van sales operations. It ensures that each van's stock is tracked and recorded, with two main operations involved: **loading** and **unloading**. Both operations are recorded within the system for accurate inventory management.

User Groups

The module creates two primary user groups:

- Manager: Full access to all modules and settings.
- Salesman: Restricted access, limited to specific tasks related to van sales.

Step-by-Step Implementation Guide

- Install the Van Point of Sale Module: Begin by installing the Van Point of Sale module in your Odoo system.
- Activate the Settings in the Inventory Module: Go to the Inventory module and activate the necessary settings for van stock management.

3. Set User Groups for Corresponding Users:

Assign the appropriate user groups (Manager or Salesman) to your users, ensuring correct access control.

4. Add Locations in the Location Settings:

In the Inventory module, configure the locations for van stock, specifying warehouse and van locations.

5. Ensure Operation Types are loaded in the Inventory Module:

On Enabling *Is Van POS* checkbox, operation types (such as VAN_SALE_LOAD, VAN_SALE_UNLOAD) will be loaded automatically for managing stock transfers.

Initiate the Van Stock Transfer Loading Process: Begin the process of loading products into the van by selecting the VAN_SALE_LOAD operation type.



7. Validate the Load Before Transfer:

Ensure that the load is validated before being transferred. This step ensures that the stock is properly allocated to the van.

8. Manager Grants Access to Transfer the Load:

The manager must grant the necessary permissions to the appropriate users (salesmen) to initiate the transfer.

9. Create a New Point of Sale:

In the POS module, create a new POS instance for van sales.

10. Ensure Operation Types are added in POS Config:

While creating the new POS, ensure that the relevant operation types (e.g., VAN_SALE, VAN_SALE_LOAD, VAN_SALE_UNLOAD) are added.

11. Close the Sale Session After the Sale:

After completing the sales, close the POS session to finalize the transaction and update the inventory.

12. Ensure Sales Do Not Exceed Available Quantity:

The system will prevent selling more than the available stock in the van during the session.

13. Real-Time Stock Update in Inventory:

Ensure that stock levels are updated in real time for accurate tracking of inventory during and after the sales session.

14. Unload Products If Not Sold:

If there are any unsold products, initiate the unloading process to return the items to the warehouse before closing the session.



5. Technical Requirements / Compatible With:

- Technical Requirements: Odoo Point of Sale, Inventory, Fleet Module.
- Compatible with: Odoo v18.0 Community & Enterprise Editions

6. Changes Log / Release Notes.

- Version 1.0.1: February 2025
 - Load transfers will now automatically move to a **Cancelled** or **Rejected** state if the Supervisor rejects the transfer after validation.
 - \circ $\,$ 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.
 - System not let us sell more than available products in the current session's van location stock.
 - \circ 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 1.0.0: December 2024
 - o 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>.