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User Manual

POS Return Resale Management for Odoo v18.0

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## 1. Introduction

The **POS Return Resale Management** module is easy to install and seamlessly integrates with the Odoo Point of Sale system. This module introduces specialized features designed to efficiently manage product returns. All return transactions are linked to the original pos order, ensuring accurate tracking of refunds and stock movements. The process begins when a customer requests a return and concludes with automatic adjustments to inventory and accounting records, maintaining complete operational accuracy.

## 2. Features

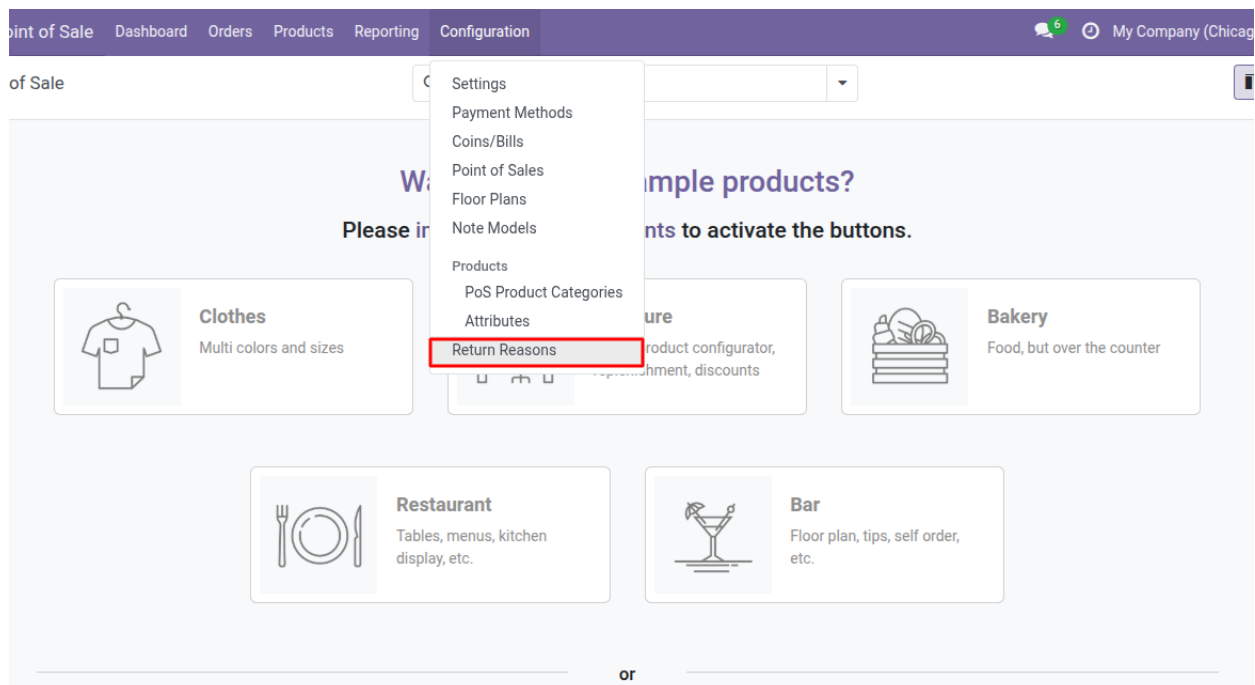
- **Mandatory Return Reason Selection:** When performing a return or refund in POS, the cashier must select a reason (e.g., Damaged Product, Customer Dissatisfaction, Incorrect Item, etc.) before confirming the operation.
- **Configurable Return Reasons:** Create and manage a predefined list of return reasons in the backend.
- **Linked with POS Orders:** Each return reason is stored and linked to its corresponding POS order and order lines, ensuring traceability at both the product and transaction level.
- **User Access Control:** Only authorized roles (e.g., POS Manager) can add, modify, or delete available return reasons, ensuring standardized reporting.
- **Return Analytics Dashboard:** Visualize total returns, most frequent return reasons, and return percentages by product, store, or cashier in a real-time dashboard.
- **Easy Installation:** Install and configure the module seamlessly with zero coding required.
- **Audit and Compliance Reporting:** Generate detailed reports on returns, including the responsible user, timestamp, and justification, for management and auditing.

- **Multi-Session & Multi-Company Support:** Works seamlessly across different stores, POS terminals, and company environments.
- **Integration with Inventory Adjustments:** Automatically sync returned product quantities with inventory and include return reasons in adjustment records.
- **100% Native Odoo Integration:** Developed using Odoo's native POS framework for perfect compatibility and smooth performance.

### 3. Screenshots

#### Screenshot 1: POS Return Resale Management - Return Reasons Menu

- Navigate to **Point of Sale** in Odoo.
- Navigate to **Configuration** menu
- Select **Return Reasons**.



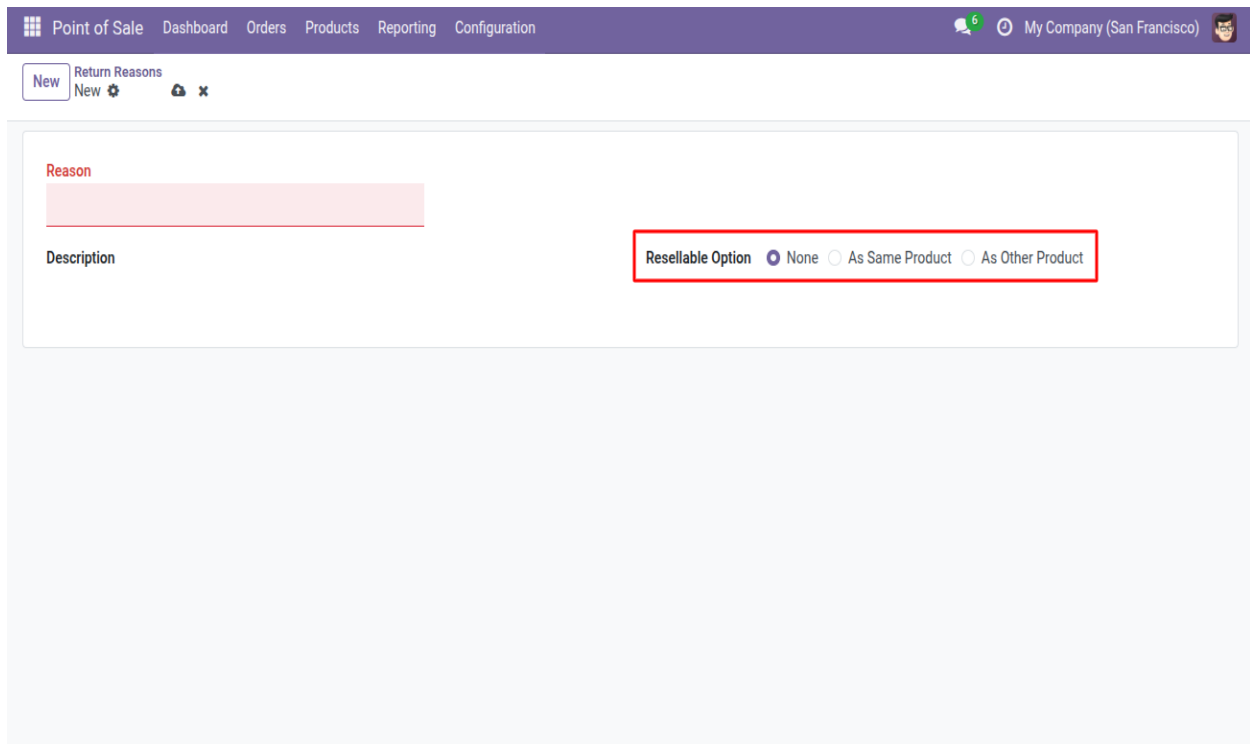
## Screenshot 2: POS Return Resale Management - List of Return Reasons

- The list of configured **Return Reasons** will be displayed.
- Click the “**New**” button to create a new return reason.

| New                      | Return Reasons ⚙️               | 🔍 Search...  | 1-3 / 3 < >       |
|--------------------------|---------------------------------|--|-------------------|
| <input type="checkbox"/> | Reason                          | Description  | Resellable Option |
| <input type="checkbox"/> | 🔧 Product Damaged               | The product has been damaged either during delivery or after purchase  | None              |
| <input type="checkbox"/> | 🔧 Unused Product                | The product was returned by the customer without being used or opened. | As Same Product   |
| <input type="checkbox"/> | 🔧 Product Returned for Exchange | The customer returned the product to exchange it for a different item  | As Other Product  |

### Screenshot 3: POS Return Resale Management - Create a New Return Reason

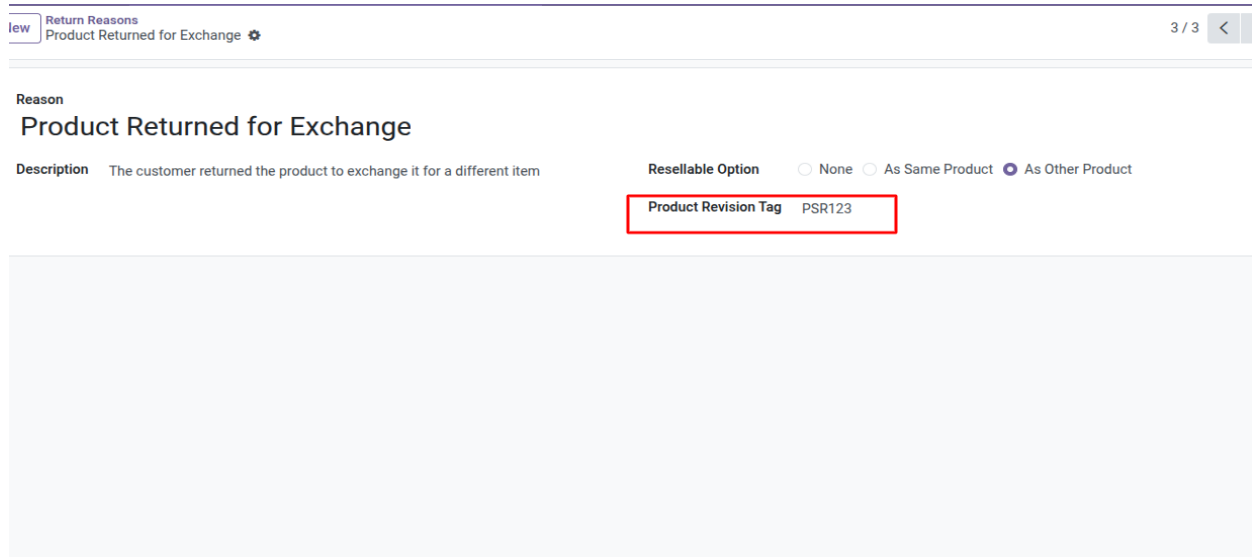
- Enter the **Reason** title and a short **Description** for the return.
- Select the appropriate **Resellable Option**:
  - None
  - As Same Product
  - As Other Product
- Click **Save** to add the new return reason to the list.



The screenshot shows the Odoo POS interface for creating a new return reason. The top navigation bar includes 'Point of Sale', 'Dashboard', 'Orders', 'Products', 'Reporting', and 'Configuration'. The user is logged in as 'My Company (San Francisco)'. The main header shows 'Return Reasons' with a 'New' button and a settings icon. The form itself has two main sections: 'Reason' and 'Description'. The 'Reason' section has a text input field. The 'Description' section has a text input field. To the right of the 'Description' field is a 'Resellable Option' section with three radio buttons: 'None' (selected), 'As Same Product', and 'As Other Product'. The 'Resellable Option' section is highlighted with a red box.

#### Screenshot 4: POS Return Resale Management - As Other Product

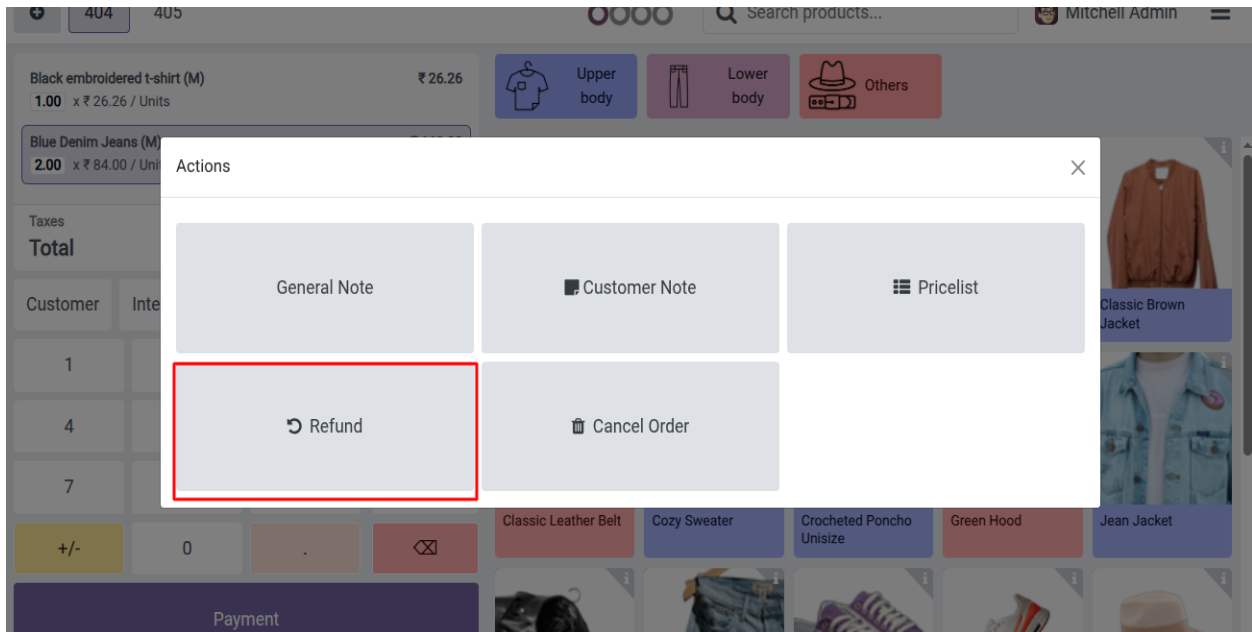
- Select **As Other Product** is from the Resellable Option.
- A new field named **Product Revision Tag** will appear.
- Enter the appropriate **Product Revision Tag** for the returned item.
- Click **Save** to store the new return reason with the selected revision tag.



The screenshot shows the Odoo POS interface for creating a return reason. At the top, there's a breadcrumb trail: 'Return Reasons' > 'Product Returned for Exchange'. Below this, the form title is 'Product Returned for Exchange'. Under the title, there's a 'Description' field with the text 'The customer returned the product to exchange it for a different item'. To the right of the description, there's a 'Resellable Option' section with three radio buttons: 'None', 'As Same Product', and 'As Other Product'. The 'As Other Product' option is selected. Below the radio buttons, there's a 'Product Revision Tag' field with the value 'PSR123'. The field is highlighted with a red border. The bottom of the form is a large, empty light gray area.

### Screenshot 5: POS Return Resale Management – Go to Refund Option

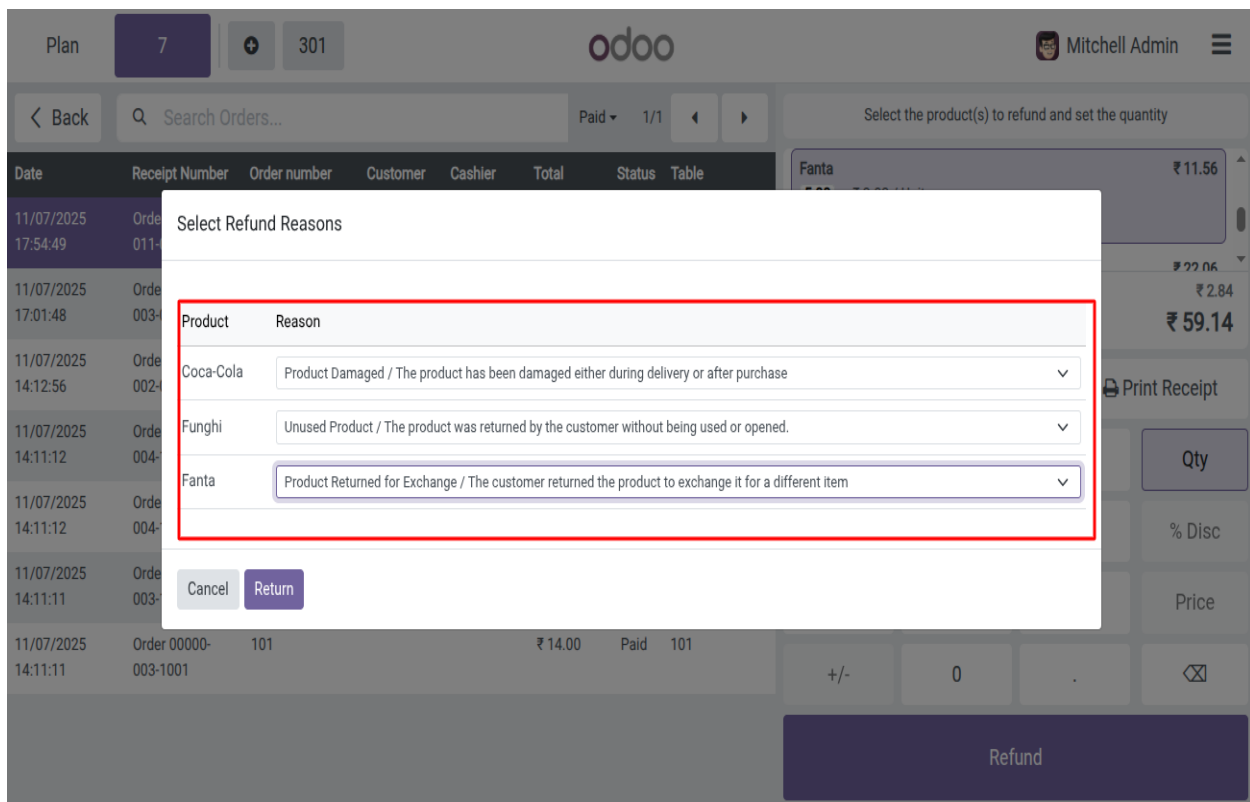
- Navigate to **Dashboard** in Point of Sale.
- Open the Register from the Dashboard.
- Go to **Actions** and select the **Refund** option





## Screenshot 6: POS Return Resale Management – Return Multiple Products with Different Reasons

- Select the Order Number and the Quantity of the Refunded Product.
- Click on the **Refund** button.
- **Select Refund Reasons** popup will appear.
- Select an appropriate **Reason** for each product listed.
- Click **Return** to complete the refund process.



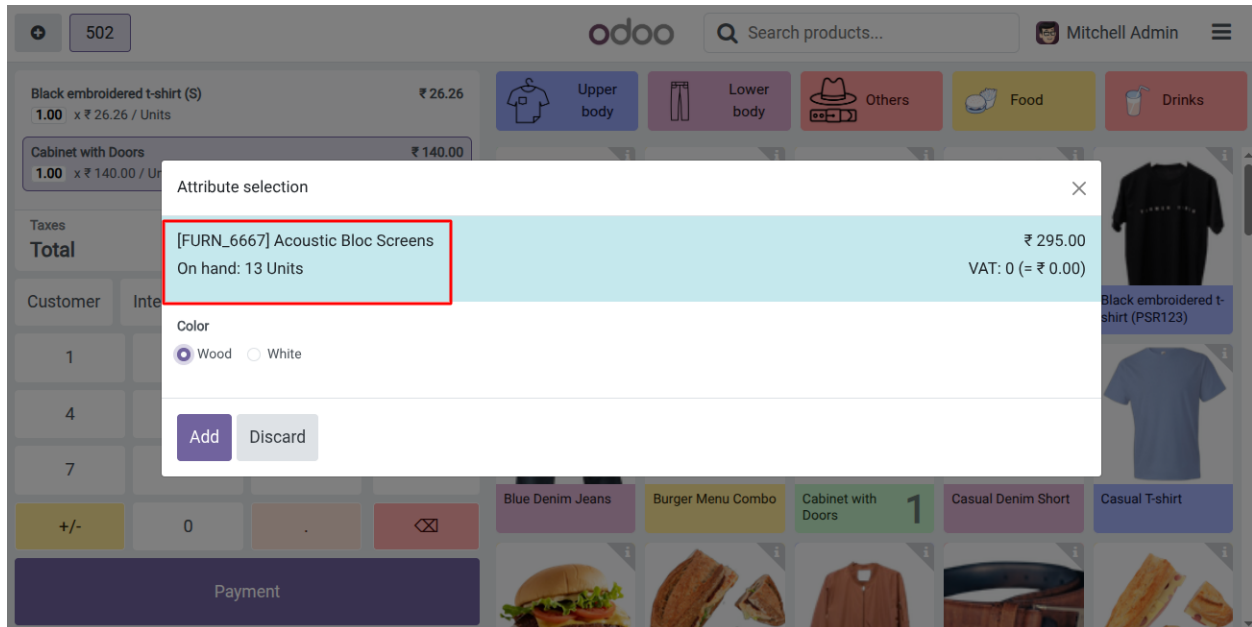
The screenshot shows the Odoo POS interface with a 'Select Refund Reasons' popup. The popup contains a table with the following data:

| Product   | Reason  |
|-----------|---|
| Coca-Cola | Product Damaged / The product has been damaged either during delivery or after purchase               |
| Funghi    | Unused Product / The product was returned by the customer without being used or opened.               |
| Fanta     | Product Returned for Exchange / The customer returned the product to exchange it for a different item |

At the bottom of the popup, there are 'Cancel' and 'Return' buttons. The 'Return' button is highlighted in blue. In the background, the POS interface shows a list of orders and a 'Refund' button at the bottom right.

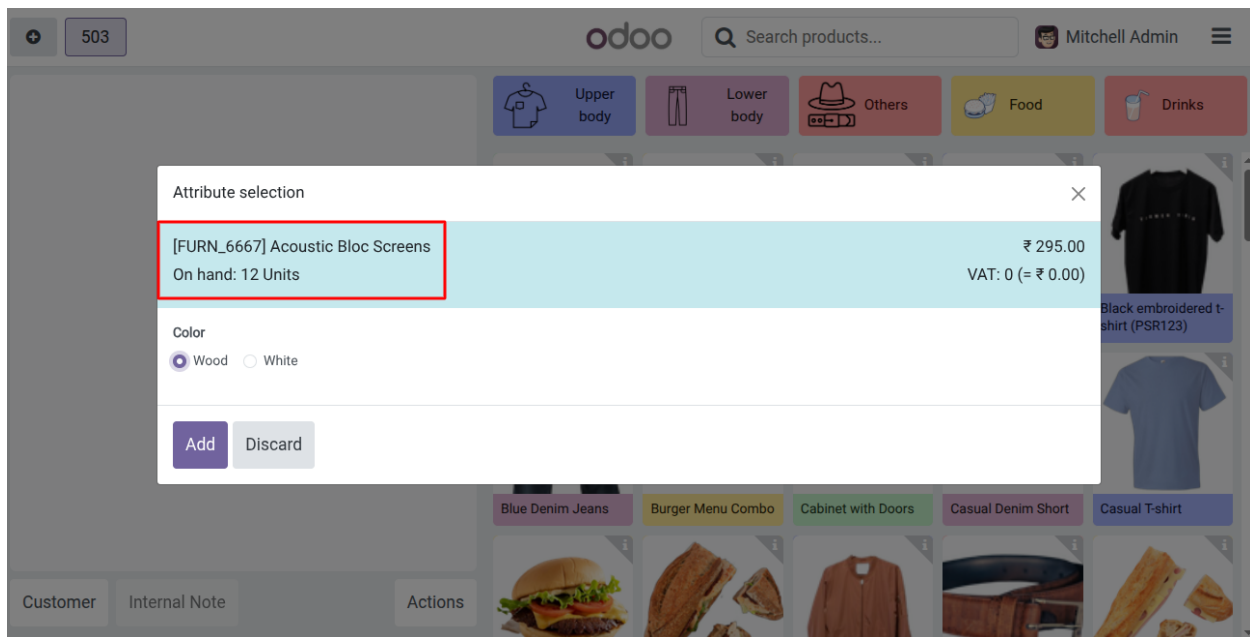
### Screenshot 7: POS Return Resale Management – Before the Order

- Select the **Ordered** Product.
- Check the **on-hand quantity** of the product.



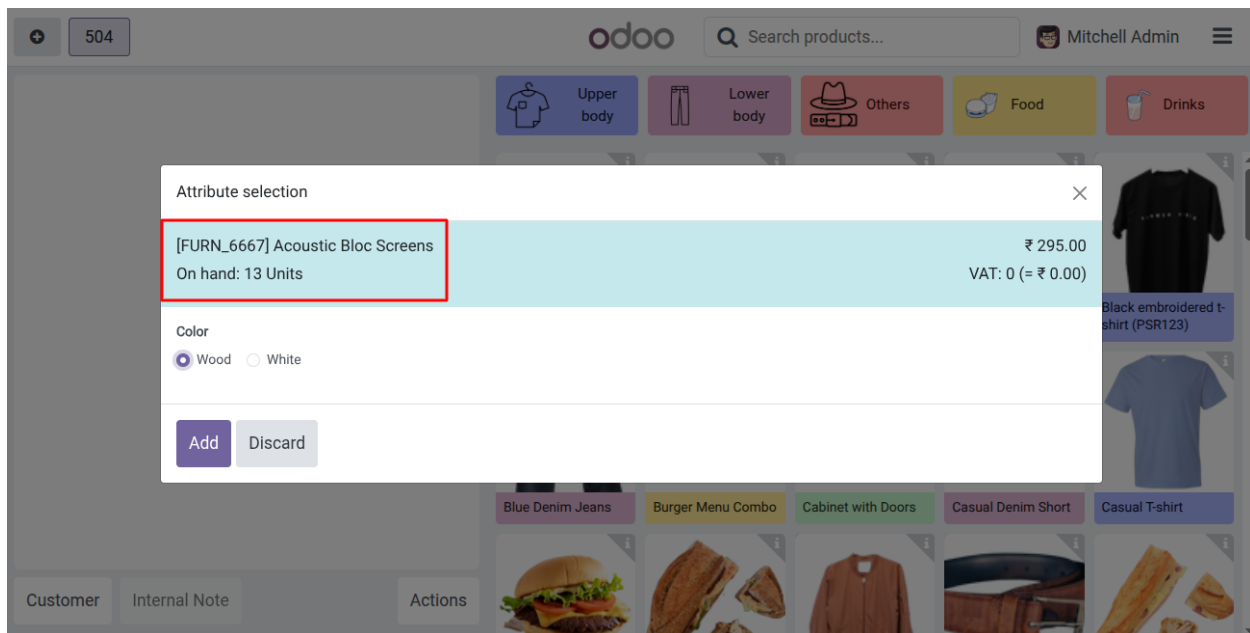
### Screenshot 8: POS Return Resale Management – After the Order

- After the **Order** is confirmed.
- The product's **on-hand** quantity is reduced.



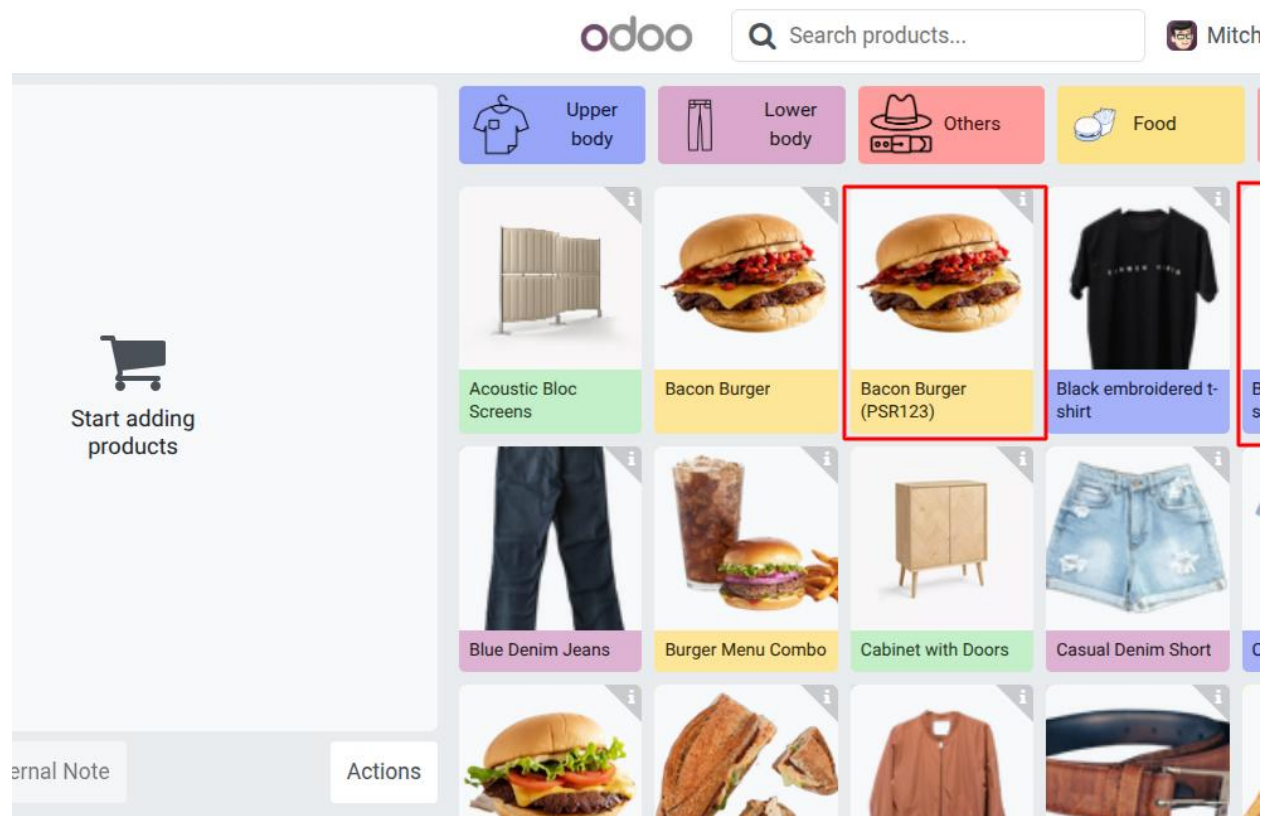
### Screenshot 9: POS Return Resale Management – After Refund the Order (AS Same Product)

- If the refund reason has **Resellable Option = As Same Product**
- Returned products are **added back to inventory**.
- The **product quantity automatically updates** in real time.
- This ensures **accurate stock tracking** and resellable inventory management.



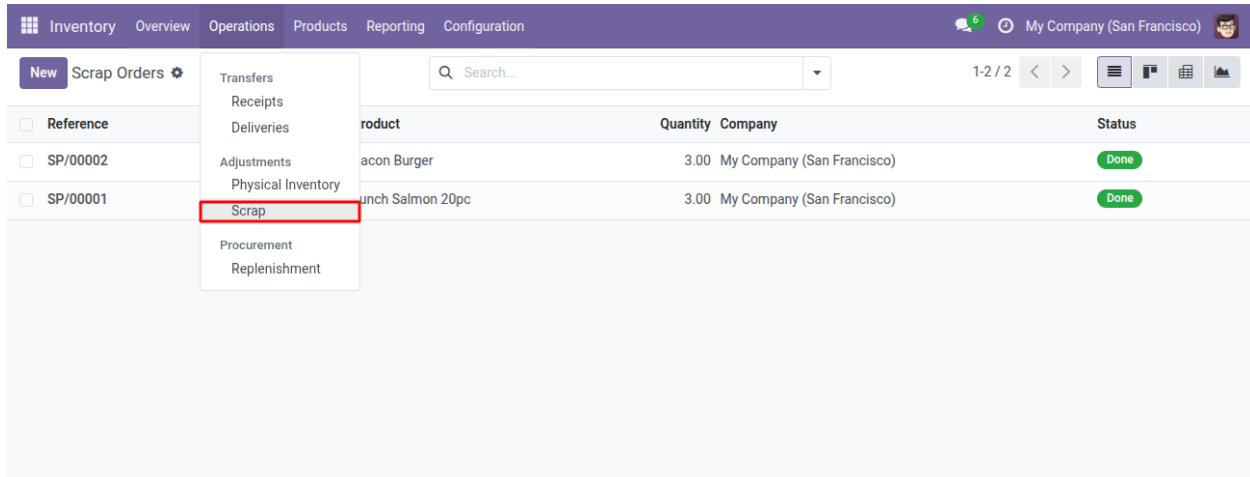
### Screenshot 8: POS Return Resale Management – After Refund the Order (AS Other Product)

- If the refund reason has **Resellable Option = As Other Product**.
- A **Product Revision Tag** field appears.
- The system logs this as a **new or revised product** in the inventory.



### Screenshot 9: POS Return Resale Management – View Scrap Product

- If the refund reason has **Resellable Option = None**
- Return Item is moved to Scrap.
- Navigate to **Inventory** in Odoo.
- Go to **Operation** in **Inventory**.
- Click on Scrap.

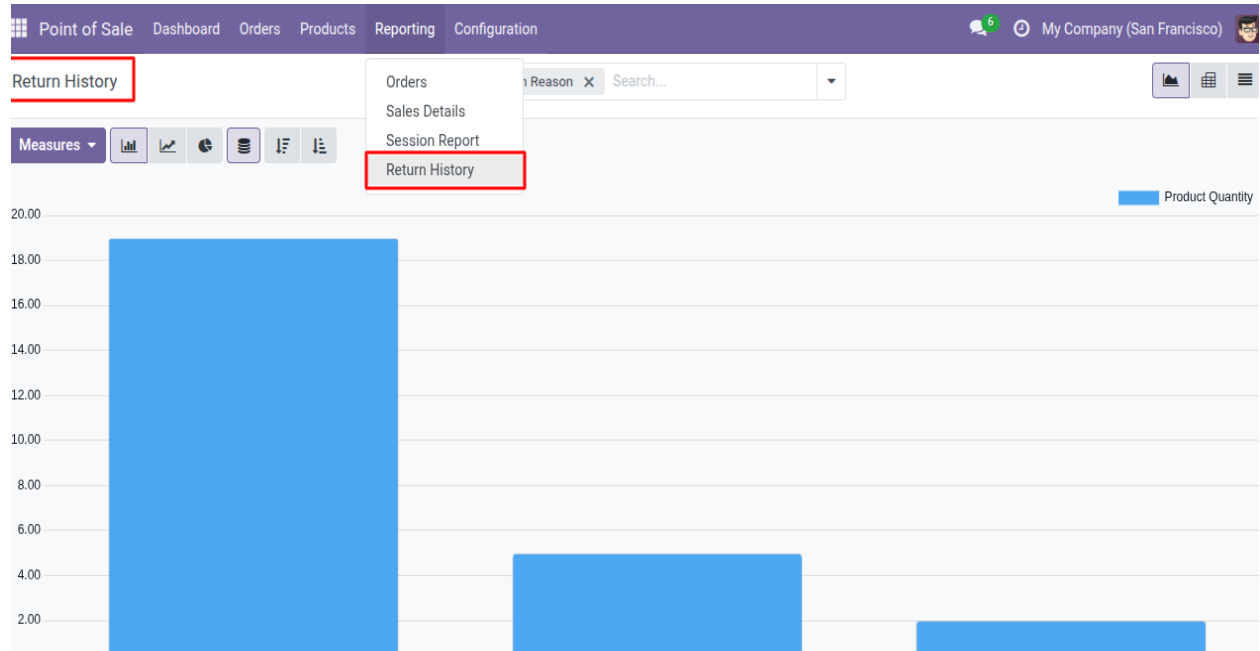


The screenshot shows the Odoo Inventory application interface. The top navigation bar includes 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The 'Inventory' menu is open, showing a list of operations: 'Transfers', 'Receipts', 'Deliveries', 'Adjustments', 'Physical Inventory', 'Scrap' (highlighted with a red box), 'Procurement', and 'Replenishment'. The main content area displays a table of inventory items with columns for 'Product', 'Quantity', 'Company', and 'Status'. Two items are listed: 'Hacon Burger' and 'Hunch Salmon 20pc', both with a quantity of 3.00 and status 'Done'.

| Product           | Quantity | Company                    | Status |
|-------------------|----------|----------------------------|--------|
| Hacon Burger      | 3.00     | My Company (San Francisco) | Done   |
| Hunch Salmon 20pc | 3.00     | My Company (San Francisco) | Done   |

## Screenshot 10: POS Return Resale Management - Return History

- Navigate to the **Point of Sale** module in Odoo.
- Go to the **Reporting** menu.
- From the dropdown list, select **Return History**.



## 4. Brief Description

This module introduces new features to the Point-of-Sale system, specifically designed for managing product returns efficiently. It enables users to record, categorize, and process returned products with greater accuracy and control. Each return is linked to a specific **reason** and **resellable option**, ensuring proper handling based on product condition.

The module supports three types of return actions:

- **None** – Non-resellable products are marked as scrap.
- **As Same Product** – Returned products are restocked into inventory.
- **As Other Product** – Returns are linked to a revised or alternative product using a **Product Revision Tag**.

### Step-by-Step Explanation

#### 1. Install the POS Return Resale Management Module:

Begin by installing the POS Return Resale Management module in your Odoo system to enable enhanced return handling features in the Point of Sale.

#### 2. Access the Return Reasons Configuration:

Navigate to **Point of Sale** → **Configuration** → **Return Reasons** to define and manage various reasons for product returns.

#### 3. Create Return Reasons:

Enter the reason title, description, and select the appropriate **Resellable Option**.

#### 4. Resellable Options Configuration:

- **None:** Product is considered damaged or non-resellable and will be moved to Scrap.
- **As Same Product:** Product is resellable and quantity is updated in inventory.
- **As Other Product:** Product is replaced with another product version using a **Product Revision Tag**.



**5. Refund Process in POS:**

From the **Point of Sale Dashboard**, open the required register and select **Actions** → **Refund** to begin the return process.

**6. Select Orders for Refund:**

Choose the **Order Number** and select the **Products** and **Quantities** that need to be refunded.

**7. Choose Return Reasons:**

In the refund popup, select an appropriate **Return Reason** for each product being returned.

**8. Automatic Action Based on Resellable Option:**

Depending on the resellable option chosen, the system automatically updates inventory or moves items to scrap.

**9. Scrap Handling:**

If the return reason type is **None**, the product will be moved to the **Inventory** → **Scrap** section for tracking.

**10. Inventory Update for Same Product:**

If the return reason type is **As Same Product**, the returned item will be added back into the inventory, and the product quantity will be updated automatically.

**11. Product Revision for Other Product:**

When **As Other Product** is selected, a **Product Revision Tag** field appears to record the reference of the new or updated product.

**12. Return History Report:**

Navigate to **Point of Sale** → **Reporting** → **Return History** to review all refund records, including reason, quantity, and resellable option.

**13. Data Transparency and Tracking:**

All return transactions are stored in the system, ensuring accurate product movement tracking and complete visibility for supervisors and managers.

## 5. Technical Requirements / Compatibility

- This module requires Odoo's Point of Sale, Inventory, and Products applications to function properly.
- Compatible with: Odoo v18.0 Community & Enterprise Editions

## 6. Change Log / Release Notes

- Version 1.0.0: January 2026
  - Initial release.

## 7. Support

If you have questions, use our contact form at [webshopextension.com](https://webshopextension.com) or email at [support@webshopextension.com](mailto:support@webshopextension.com).