Implementation Guide

Point of Sale Dashboard Module

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1.0 Introduction

This plugin is designed to enhance the Point of Sale (PoS) experience for Odoo users by introducing a feature-rich dashboard with informative charts and graphs. This enhanced transparency and collaboration foster a more cohesive and informed team environment, where employees can collectively identify trends, make strategic adjustments, and work towards common goals

1.1 Target Audience

1. Existing Odoo users
2. Odoo Point of Sale Users
3. Business Owners
4. System Administrators, Sales Executives, Managers, and more
5. Retail & Wholesale Business Owners & staffs

1.2 Problem Statement

The current versions of Odoo lack a feature to display a Point-of-Sale Dashboard with detailed charts and graphs, making it challenging for users to visualize sales data effectively.

1.3 Solution

This plugin solves the problem by introducing a feature that displays detailed sales information through Point of Sale in a user-friendly manner, using charts and graphs. Thus, addressing the need for a comprehensive and visually appealing PoS dashboard within Odoo, offering users an intuitive way to access sales data.

1.4 Features

- **Versatile Charts:** Enjoy various charts like customer vs. orders, product vs. orders, and more for easy sales trend tracking.
- **Dynamic Design:** Random color generation keeps your dashboard fresh and visually appealing.
- **Responsive Layout:** Charts adapt seamlessly to any device, ensuring a consistent user experience.
- **Graph Options:** Choose from bar and line graphs with clear axis labels to tailor data presentation.
- **Quick Insights:** Access order and sales info swiftly with badge buttons for efficient decision-making.
- **Table Reports:** Data presented in a user-friendly table format with customizable filters for precise data access.
- **Efficient Filtering:** Easily extract valuable insights by applying data filters for a tailored experience.
- **Enhanced Data Visualization:** Simplify complex data with charts, revealing trends and patterns that text alone can't convey.

1.5 Work Flow Explanation

In this section, we cover various elements of our POS Dashboard:

1. **Customers vs. Number of Orders Graph**: This graph shows the number of orders made by each customer.
2. **Product Name vs. Number of Orders Graph**: This graph shows the number of orders executed for each product.
3. **Product Name vs. Stock Graph**: This graph shows how much stock is available for each product.
4. **Order Details**:
   Click on the following tabs to get various details of POS.
   - Today's Number of Orders: Get the number of orders executed on that day.
   - Total Number of Orders: Get the total number of orders made to date.
   - Today's POS Sales: Get the details of total sales executed to date.
   - Total Income – POS Sales: Get the details of total income obtained from sales after subtracting expenses.
   - Total Number of Sessions – The total number of sessions executed to date.
5. Report: Generate a sales report with the following filters: Date, Products, Salesman, Product Categories, and Customer.

1.6 Demo Video

Refer this link for demo video : **Demo video**

1.7 Release Note

POS Dash board module is for Odoo version 16.0