



Implementation Guide

Point of Sale Order Transfer Plugin



Table of Contents

1.0 Introduction	3
<i>1.1 Target Audience</i>	3
<i>1.2 Problem Statement</i>	3
<i>1.3 Solution</i>	3
<i>1.4 Features</i>	4
1.5 Work Flow Explanation	
1.6Release Note	11

1.0 Introduction

Odoo POS (Point of Sale) provides solutions when it comes to handling payment counters in retail stores where customers pay for their purchased goods. It helps to manage your Restaurants, shops. It has a comprehensible, user-friendly interface & is used in Ipads, tablets, or laptops.

Since Odoo's Software is generally built software for all types of retail business and owners, it is not tailored to a particular customer or retailers. Thus, to make it suitable for custom needs, customized plugin need to be integrated.

1.1 Target Audience

1. Existing Odoo users
2. Odoo Point of Sale Users
3. Business Owners
4. Retail & Wholesale Business Owners & staffs

1.2 Problem Statement

Currently, in any Version of Odoo, there is no feature to transfer the Order from one Shop/Session/Point of sale to another.

1.3 Solution

By adding a feature - >Transferring/Forwarding current order to other point of sale

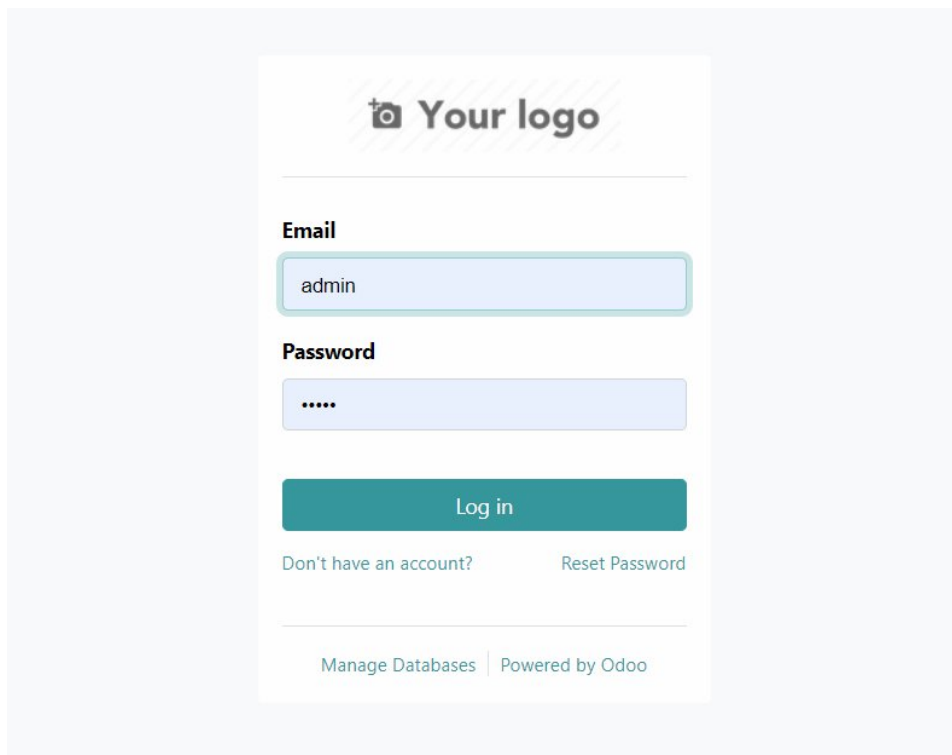
1.4 Features

1. Main Branch & Sub branch Division between Point of sales.
2. Point of sale user can Transfer one Order to other Point of sale.
3. Automatically updates the number of Transfer counts
4. User Can Merge the Transferred order with Current order or Make as a New Order
5. User can see the incoming Orders in seperate screen

1.5 Work Flow Explanation

Login using your user credentials.

Step 1)



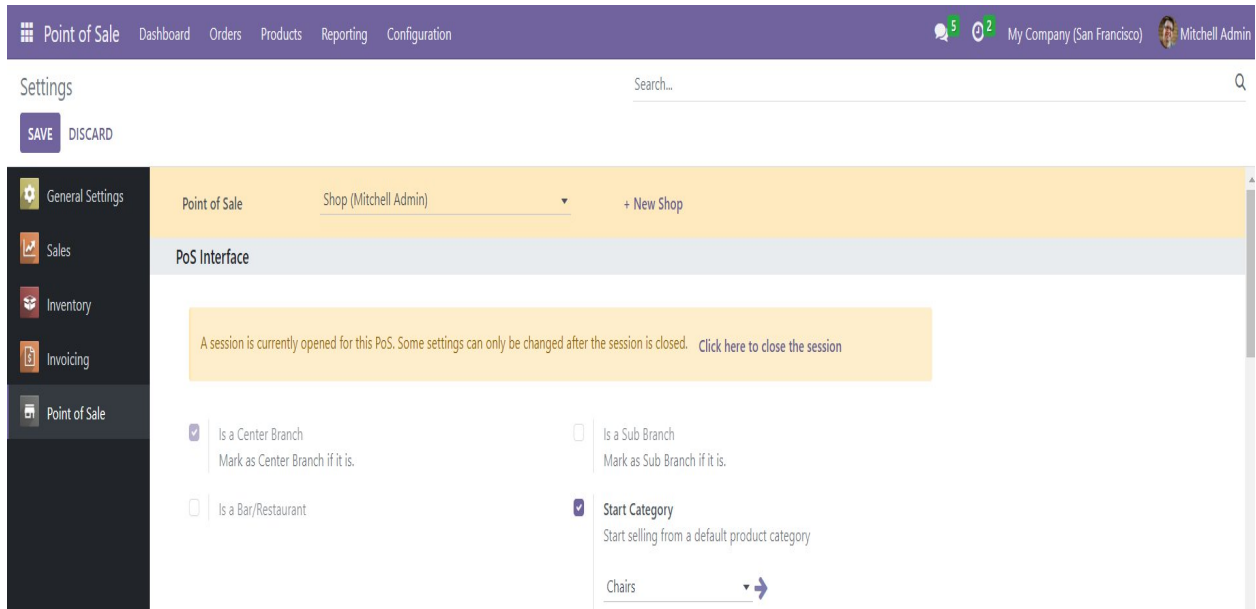
The screenshot shows a login form with the following elements:

- A header area with a camera icon and the text "Your logo".
- An "Email" label above a text input field containing "admin".
- A "Password" label above a password input field containing "....".
- A teal "Log in" button.
- Two links: "Don't have an account?" and "Reset Password".
- Footer links: "Manage Databases" and "Powered by Odoo".

Step 2)

Use this menu path: Point of sale > Configuration > settings

Create 2 shops/point of sale and mark one as Center branch & other Sub branch using check box.



A session is currently opened for this PoS. Some settings ca

Is a Center Branch
Mark as Center Branch if it is.

changed after the session is closed. [Click here to close the session](#)



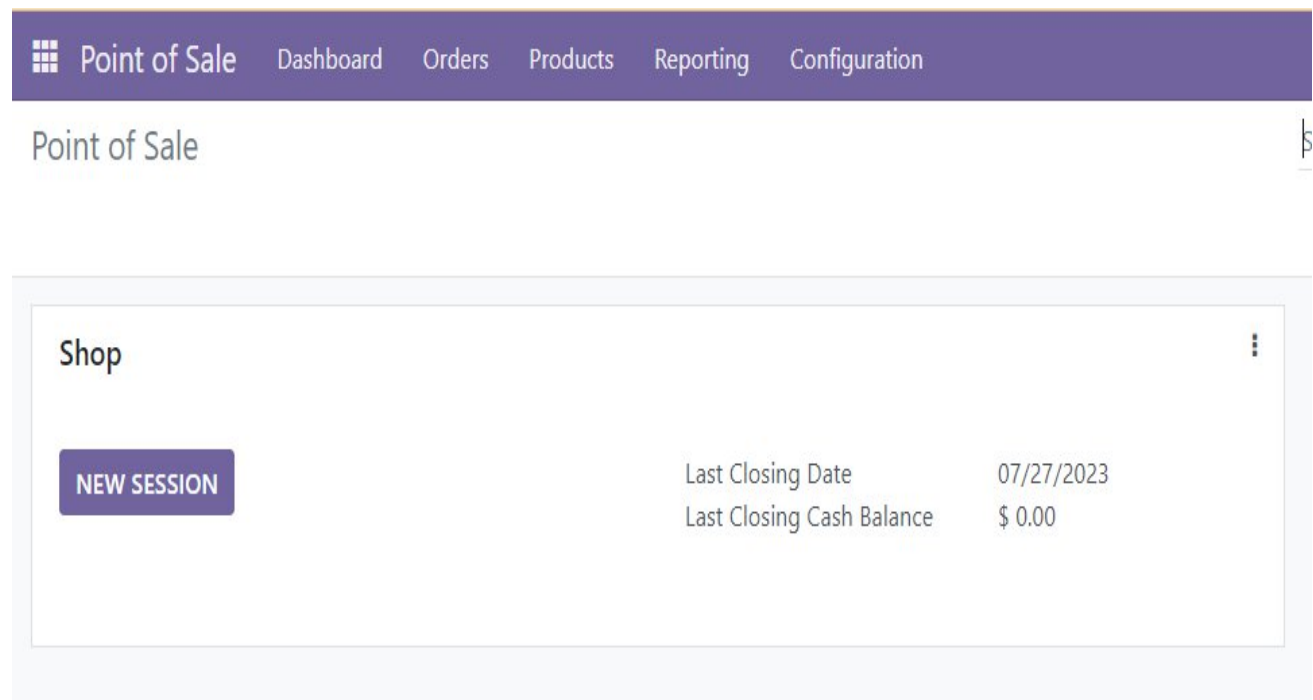
Is a Sub Branch

Mark as Sub Branch if it is.

Step 3)

Use this menu path: **Point of sale > Dashboard**

Click on **NEW SESSION** button to start new session and wait to load the Point-of-sale screen



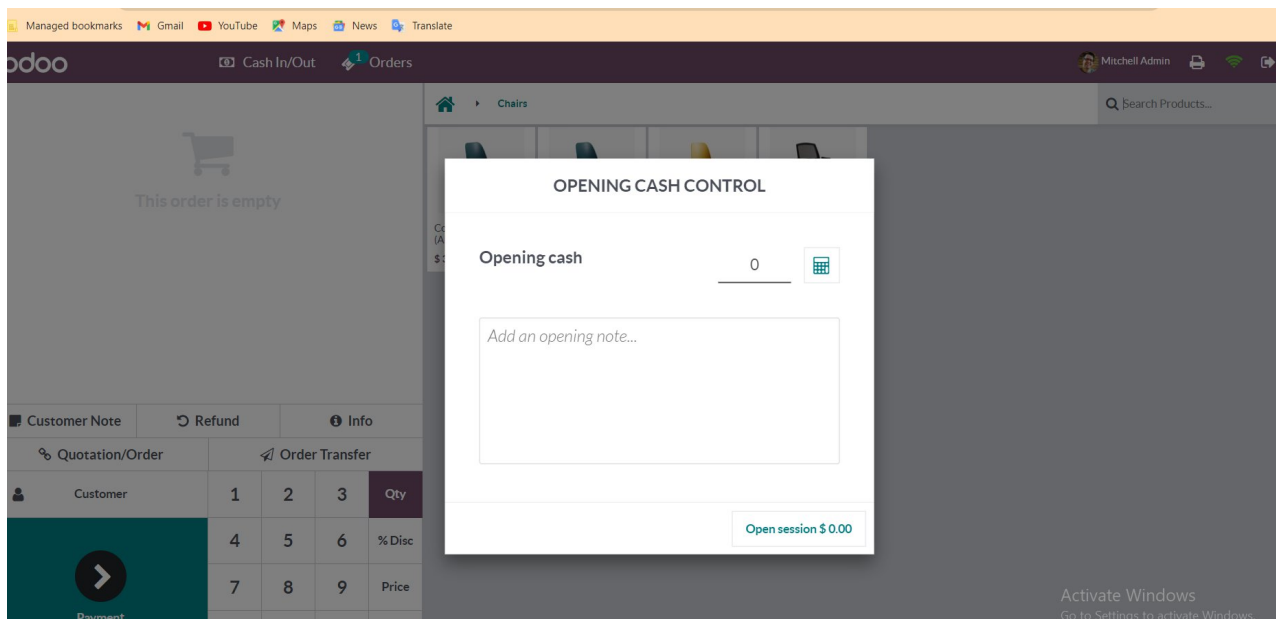
The screenshot shows the POS system interface. At the top, there is a navigation bar with the following menu items: Point of Sale, Dashboard, Orders, Products, Reporting, and Configuration. Below the navigation bar, the text 'Point of Sale' is displayed. The main content area shows a 'Shop' window with a 'NEW SESSION' button and session details:

Last Closing Date	07/27/2023
Last Closing Cash Balance	\$ 0.00

Step 4)

You will get this screen

- 1) Enter the opening balance
- 2) And click Open session button



Step 5)

- 1) Add products
- 2) Add customer note
- 3) Add quantities
- 4) Add customer
- 5) Click on the **Order Transfer** Button in the number pad



odoo Cash In/Out Orders

Conference Chair (Aluminium) \$ 39.40
1.00 Units at \$ 39.40 / Units
Test 2

Conference Chair (Steel) \$ 33.00
1.00 Units at \$ 33.00 / Units
test 1

Total: \$ 72.40

Customer Note Refund Info

Quotation/Order Order Transfer

Azure Interior	1	2	3	Qty
	4	5	6	% Disc
	7	8	9	Price
	+/-	0	.	

Payment

Chairs

- Conference Chair (Aluminium) \$ 39.40
- Conference Chair (Steel) \$ 33.00
- Office Chair \$ 70.00
- Office Chair Black \$ 120.50

Step 6)

You will get a popup like this picture

Select one shop to transfer from the drop-down menu

Click on **Transfer** Button

\$ 33.00

total: \$ 72.40

Info

er Transfer

3	Qty
6	% Disc
9	Price

ORDER TRANSFER SCREEN

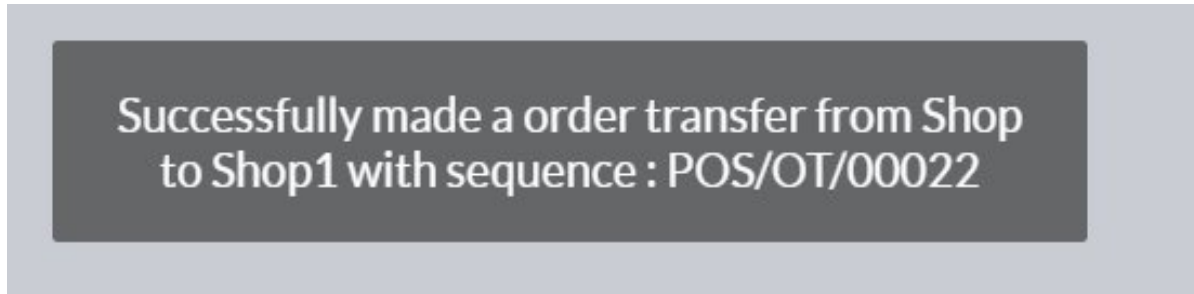
27/07/2023
12:46:51

Sub Branches:

Select One option
Select One option
Shop1

Transfer Cancel

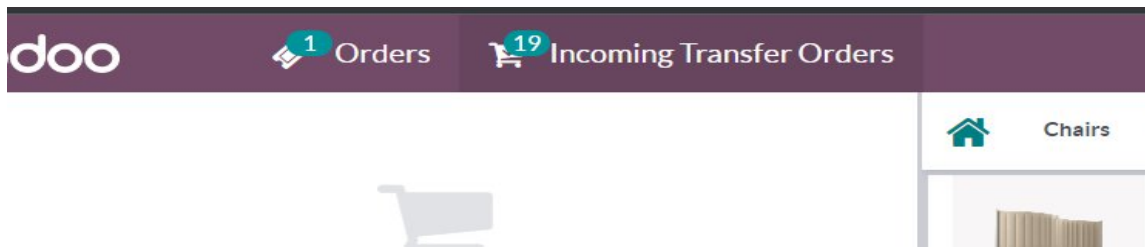
An intimate message will show the details of the order transferred.



Step 6)

Login as sub branch user session

And click on the Incoming Transfer order button




Step 6)

You will a screen like this:

Click on **GO** button

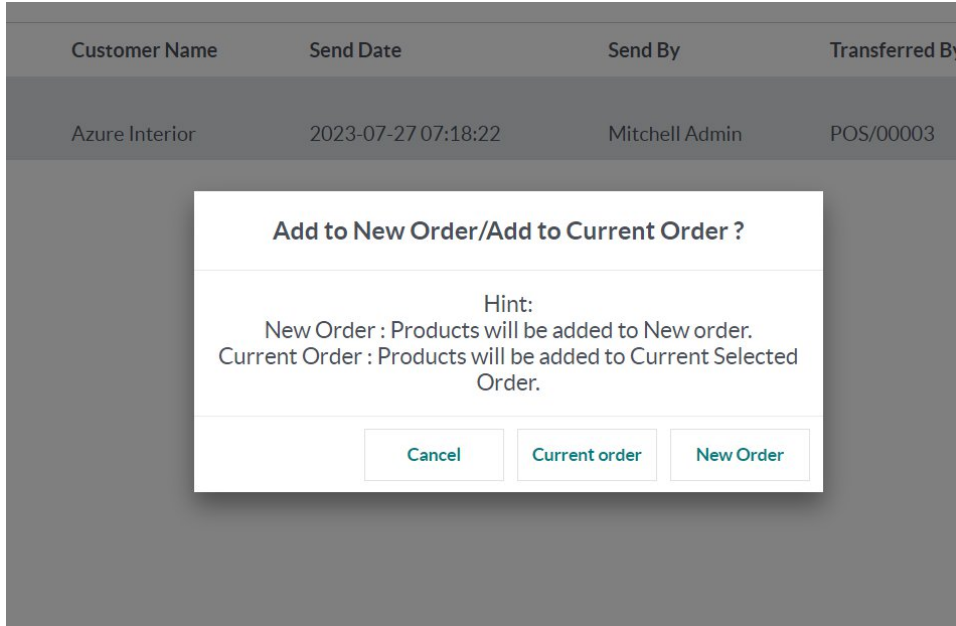
Discard

Sequence	Transfer Order Name	Customer Name	Send Date	Send By	Transferred By (Session)	State	
POS/OT/00022	Shop to Shop1	Azure Interior	2023-07-27 07:18:22	Mitchell Admin	POS/00003	draft	

Step 6)

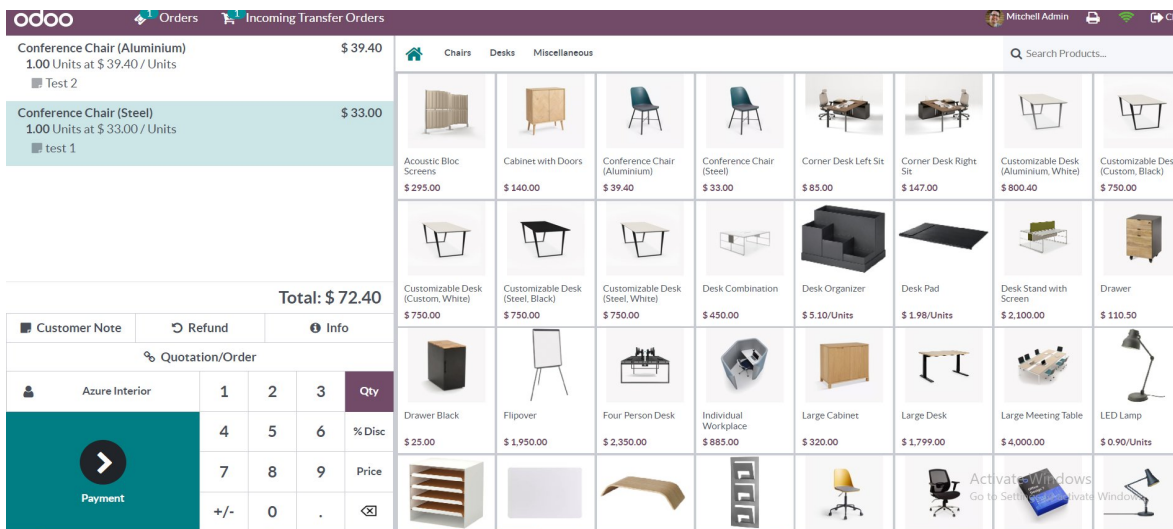
Click on the button from the popup as you needed.

Hint is provided



Step 6)

You will get back to the product screen with context you have selected.





1.6 Release Note

POS Order Transfer is for Odoo version 16.0