

Implementation Guide

Point of Sale Order Transfer Plugin



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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

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- 1. Main Branch & Sub branch Divison 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 Transfered 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.

<u>Step 1)</u>

🖸 Your	logo
Email	
admin	
Password	
Log in	
Don't have an account?	Reset Password
Manage Databases P	owered by Odoo



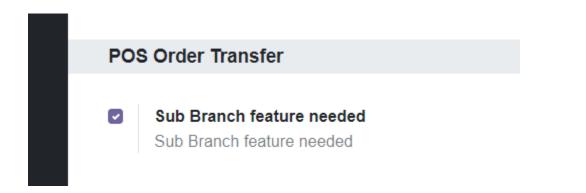
<u>Step 2)</u>

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

There is a Boolean Value for configuring Sub Branch Feature is needed or not.

Boolean check : We can configure Point of sale configuration as Main branch or Sub branch & Order transfer is possible only from Main branch to Sub branch.

Boolean check : We can transfer order from any point of sale conf to any other.



<u>Step 3)</u>

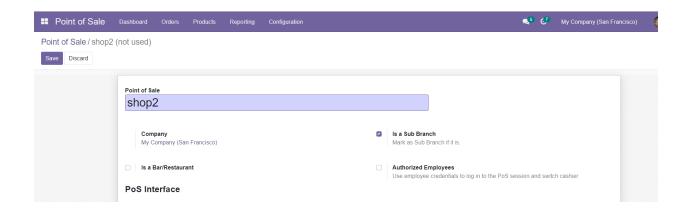
Use this menu path: Point of sale > Configuration > Point of sale

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

If you have checked the configuration mentioned in previous step , then only this feature will be available.



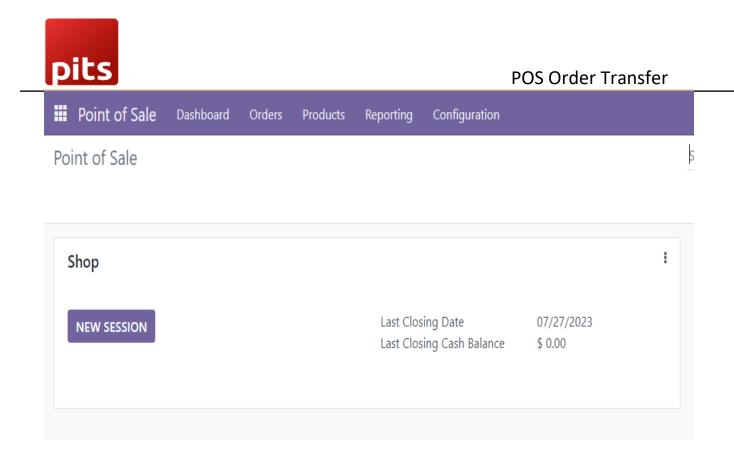
int of Sale / Shop	Mitchell Admin)		
ave Discard			1/2 <
	A session is currently opened for this PoS. Some settings can only be changed after the ses	ssion is closed. Click here to close the session	
	Company My Company (San Francisco)	 Is a Center Branch Mark as Center Branch if it is. 	
	is a Bar/Restaurant	Authorized Employees Use employee credentials to log in to the PoS session and switch cashier	
	PoS Interface		
	Product Configurator Select product attributes	Customer Notes Add notes on order lines to be printed on receipt and invoice	
	Category Pictures Display pictures of product categories	Restrict Product Categories Pick which product categories are available	
	Start Category Start selling from a default product category Chairs	Large Scrollbars Improve navigation for imprecise industrial touchscreens	
	Limited Partners Loading Only load a limited number of customers at the opening of the PoS.		
	Connected Devices		



<u>Step 3)</u>

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

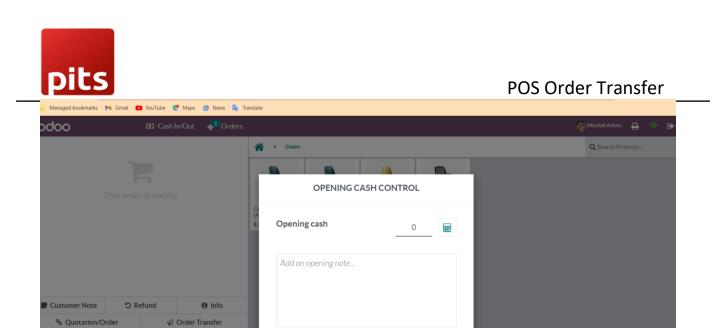


<u>Step 4)</u>

You will get this screen

1)Enter the opening balance

2)And click Open session button



Open session \$ 0.00

<u>Step 5)</u>

Customer

>

- 1) Add products
- 2) Add customer note

1

4 5

7

2

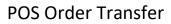
8 9 Price

3

6 % Disc

- 3) Add quantities
- 4) Add customer
- 5) Click on the Order Transfer Button in the number pad

odoo	0 0	Cash In/Out	<mark>参¹</mark> Orders				
Conference Chair (Alu 1.00 Units at \$ 39.40 Test 2			\$ 39.40	A · Chairs			
Conference Chair (Ste 1.00 Units at \$ 33.00 test 1			\$ 33.00	Conference Chair (Aluminium) \$ 39.40	Conference Chair (Steel) \$ 33.00	Office Chair \$ 70.00	Office Chair Black \$ 120.50
		Tot	tal: \$ 72.40				
, Customer Note	"O Refund	То	tal: \$ 72.40 Info				
, Customer Note % Quotation/Or		Tot ⊲ Order	 Info 				
	der		 Info 				
	der	Ø Order	 Info Transfer 				
% Quotation/Or	der or 1	✓ Order	 Info Transfer Qty 				



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<u>Step 6)</u>

You will get a popup like this picture

Select one shop to transfer from the drop-down menu

Click on **Transfer** Button

\$ 33.00	
	CC ORDER TRANSFER SCREEN
	27/07/2023 12:46:51
	Sub Branches:
otal: \$ 72.40	Select One option
 Info 	Select One option Shop1
er Transfer	
3 Qty	Transfer Cancel
6 % Disc	
9 Price	

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

Successfully made a order transfer from Shop to Shop1 with sequence : POS/OT/00022

<u>Step 6)</u>

Login as sub branch user session

And click on the Incoming	Transfer order button
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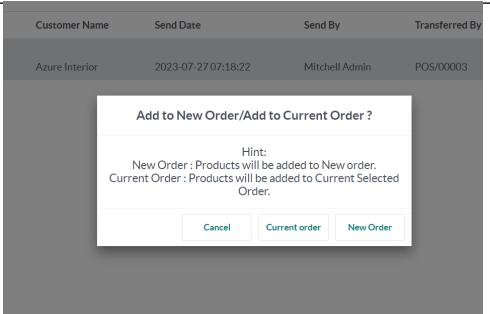
doo	<mark>*</mark> 1	Orders	19 Incomi	ng Transfer	Orders		
					1	Chai	irs
<u>Step 6)</u>							
You will	a screen like	e this:					
Click on	GO button						
Discard	Transfer Order Name	Customer Name	Send Date	Send By	Transferred By (Session)	State	
POS/OT/00022	Shop to Shop1	Azure Interior	2023-07-27 07:18:22	Mitchell Admin	POS/00003	draft	'쁜 GO

<u>Step 6)</u>

Click on the button from the popup as you needed.

Hint is provided

POS Order Transfer



<u>Step 6)</u>

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

						-							
	h air (Aluminium \$ 39.40 / Units	1)		5	\$ 39.40	Chairs	Desks Miscellaneou			4		Q Search Produc	:ts
	and the state of t						兩	兩			Y	4	
						Acoustic Bloc Screens	Cabinet with Doors	Conference Chair (Aluminium)	Conference Chair (Steel)	Corner Desk Left Sit	Corner Desk Right Sit	Customizable Desk (Aluminium, White)	Customizable D (Custom, Black)
						\$ 295.00	\$ 140.00	\$ 39.40	\$ 33.00	\$ 85.00	\$ 147.00	\$800.40	\$ 750.00
						Y	T	Y		The second			
			Te	otal: \$7	2 40	Customizable Desk (Custom, White)	Customizable Desk (Steel, Black)	Customizable Desk (Steel, White)	Desk Combination	Desk Organizer	Desk Pad	Desk Stand with Screen	Drawer
			IC	Jual: p/	2.40	(Custom, white)	(Steel, Diack)	(Steet, writte)				Screen	
Customer	Note D	Refund	IC	O Info		\$ 750.00	\$750.00	\$ 750.00	\$ 450.00	\$ 5.10/Units	\$ 1.98/Units	\$ 2,100.00	\$ 110.50
Customer		Refund							\$450.00	\$ 5.10/Units			\$ 110.50
									\$450.00	\$ 5.10/Units	\$1.98/Units		\$ 110.50
	ବ୍ତ Quo	otation/Orde	er 2	Info 3	Qty				\$450.00	\$ 5.10/Units			\$ 110.50
	ବ୍ତ Quo	otation/Orde	er	() Info	2	\$750.00	\$750.00	\$ 750.00	Individual		Ĺſ	\$2,100.00	2
-	ବ୍ତ Quo	otation/Orde	er 2	Info 3	Qty	\$ 750.00 Drawer Black	\$750.00 Flipover	\$ 750.00 Four Person Desk	Individual Workplace	Large Cabinet	Large Desk	\$ 2.100.00	LED Lamp

1.6 Release Note

POS Order Transfer is for Odoo version 15.0