

Point of Sales Management Module

The shopping and consumption characteristics of consumers are changing rapidly. Unlike in the past, the customers don't have much time to spend in shops to find their desired product. Consequently, E-commerce sales are rising. Modernization and digitalization in every possible point will make shopping more interesting and hassle-free. 'Point of Sale' is an opportune place where you can utilize this digitalization technique to give an excellent customer experience. POS is the place at which a retail transaction is carried out. Generally, billing and final adjustments are made at this point. Odoo POS module combined with hardware components like the barcode scanner, POS box, etc. perform the sales procedure.

Odoo POS is an excellent ERP where you can find all these features by default. Moreover many add-ons and apps from Odoo app store further enhance the capabilities of Odoo POS like in every other module. The Simple and user-friendly interface of Odoo Point of sales module lets the user configure and complete his all sales needs with hassle-free steps.

Feature which makes Odoo a well performing POS app are;

- **Payments**

- Payment methods

- Cash, checks, and credit card payment methods are available. New types of payment methods can be added as well.

- Credit/Debit cards

- All electronic payments are handled by external payment terminals.

- Split tenders

- A single order can be paid as a split payment between multiple parties as well as with separate payment methods.

- Currency rounding

- Prices and payments can be rounded to the smallest denomination of the currency. Offline payments

- Orders made offline are automatically synchronized when you are reconnected. Invoicing

- Generate and print invoices for your business customers.

- Accounting

- Payments are directly integrated into Odoo Accounting to make bookkeeping simple and reliable.

Customer tips

Supports customer tipping either as an added amount or by converting change to a tip.

• Checkout

Prices & discounts

Set customer prices or offer percentage-based discounts on either a single product or the entire order.

Parallel orders

Put orders aside and process multiple orders at the same time.

Customized receipts

Advertise your current promotions, hours of operation, and upcoming events on your printed receipts.

Weighting at the counter

Calculate product weight during checkout with the electronic scale integration.

Blazing fast search

Quickly find your customers and products with the built-in search features.

Sell on the move

With iPad and Android tablet support, sell anywhere within your store or restaurant. Dynamic barcodes

Embed price, weight, and discount information directly into your barcodes.

• Store Management Order history

View all past orders as well as search by customer, product, cashier, or date.

Daily sales

Keep track of daily sales and totals for every payment type.

Cashier accounts

Manage multiple cashier accounts and secure them with badges or pin codes.

Cash flows

Monitor cash register adjustments and easily verify cash contents at the end of the day.

Stock & Inventory

Monitor your stock in real-time, manage your inventory across all locations, and review shipments with the Odoo Stock integration.

Franchises

Pre-configure your franchises stores, overview their sales, and centrally manage their stock and accounting.

- **Customer & Loyalty**

Register customers

Identify your customers by simply registering their email and contact address, allowing you to offer discounts and keep track of individual sales.

Identify customers

Look-up your customers with the built-in search feature or identify them with a barcode printed on their loyalty card.

Business Customers

Register your customer's VAT number and apply them to invoices.

Loyalty Cards

Reward your customers with loyalty points and exchange them for gifts or discounts. Points can be earned by product, by order, or by sale amount.

- **Restaurant Management Floor plans**

Assign orders to tables and receive an overview of your restaurant's floors as well as make changes on the go with the graphical editor.

Manage seating

Keep track of your guests with an overview of your restaurant's capacity and table availability.

Kitchen printing

Send the order instructions to the bar and kitchen printers. Instructions can be sent to different printers automatically based on the product category.

Delayed orders

Take orders for different courses of the meal at once with the ability to send them to the kitchen printer at separate times.

Kitchen order notes

Add notes for customer's preferences, allergies, or special requests and send them to the kitchen or bar printers.

Split bills

Let customers pay separately or at different times by splitting orders.

- **Products**

Product categories

Organize your products with hierarchical product categories. Order them by popularity and display different categories in different point of sales.

Product Search

Quickly find products by their name, barcode, or description with the built-in search function.

Units of measure

Sell your products with custom or preset units of measure and update your stock accordingly.

Multiple barcodes

Configure multiple barcodes for the same product with barcode nomenclatures. Product variants

Sell different sizes, colors, or configurations of the same product with product variants.

Large product count

Odoo's Point of Sale system is capable of performing at a scale of over 100,000 products.

- **Web Application**

Browser support

Odoo POS is a web-based application and can be deployed on any device and OS running Chrome, Firefox, or Safari. Microsoft Windows, Apple OSX, Linux, Android, and iOS are all supported operating systems.

PC compatible

Odoo POS can also be used on standard PCs and tablets as well as industrial touch-screen terminals.

Works offline

Odoo's POS will keep working while offline. The web browser can be closed offline without loss of data.

HTML5 mods

Odoo's POS is Open-Source and can be customized with HTML5/JS extension modules

System Users

Manager: He has complete control over all the POS nodes. He configures, monitor and manage it. He creates a POS and assigns it to any user. He can also Add and Update product information.

User: This user will have access to only those POS assigned to him. He can log in to his POS and start the session.

How Odoo Point of Sales works

Manager creates and configures each POS nodes in Odoo POS. The system administrator can assign this POS node to appropriate users from 'Point of Sale' tab in the user profile. When a POS user login to the system, he will be directed to his POS dashboard. From there he can perform sales operations. A user must start a new session or resume an existing session to perform sales operations. Moreover, a user cannot use two Point Of Sale sessions simultaneously. The important point to note in Odoo POS is that the Point Of Sale session must be closed and validated in order to generate all the accounting entries. When a salesperson close and validate his session the respective entries will be passed to accounting module, from here, the authorized person can commit the transactions made.

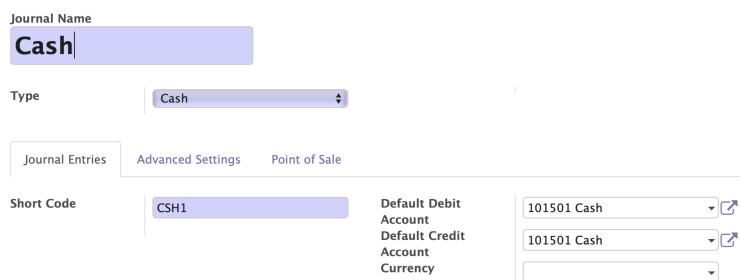
Some other distinctive feature of Odoo POS is listed below.

Basic Configuration

Setting up new payment method

To add new payment method to your POS system follow the steps.

Point of Sale > Configuration > Payment Methods



Journal Name:

Type:

Journal Entries | **Advanced Settings** | Point of Sale

Short Code:

Default Debit Account:

Default Credit Account:

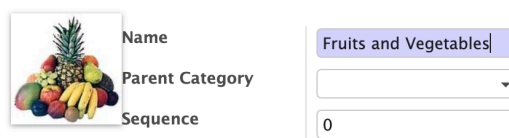
Currency:


- Add the **Journal Name** and **Type** of Journal for the payment method
- **Short Code** for unique recognition to the Journal and in the report later on
- Select the **Default Debit and Credit Account** to be used
- Click <**Advanced Settings**>, <**Point of sale**> tabs to find more customizable options

Creating new product category

Your product list can be customized/categorized according to you needs. To create a new product category follow the below procedures.

Point of Sale > Configuration > POS Product Categories



 Name:

Parent Category:

Sequence:

- **Parent Category** if you would like to have a hierarchy on the product category structure.
- Used **Sequence** to prioritized some category while using the POS .

Creating New Point of Sale

You can create any number of point of sales. When you create a user you can see an option to assign a POS to the user.

Point of Sale > Configuration > Point of Sale

This is the main console of the POS which you will configure most of the important settings.

- Fill in all Financial related setup such as **Journal** and the **Payment Methods** which we created before.
- Link the Warehouse picking **Stock Location**. By default it used the main warehouse location.
- Below are the Technical settings for the POS User Interface under **Features** and configuration on the **Hardware or POS Box**.

Point of Sale Name

Main

Picking Type	PoS Orders	Stock Location	WH/Stock
Sale Journal	Customer Invoices (USD)	Invoice Journal	Customer Invoices (USD)
Group Journal Items	<input checked="" type="checkbox"/>	Barcodes	Default Nomenclature
Default Fiscal Position		Fiscal Positions	
		Active	<input checked="" type="checkbox"/>

Available Payment Methods

Short Code	Journal Name	Type
CSH1	Cash	Cash

Add an item

Features

Virtual KeyBoard <input type="checkbox"/> Invoicing <input checked="" type="checkbox"/> Prefill Cash Payment <input type="checkbox"/> Start Category <input type="text"/> Tip Product <input type="text"/> Include Taxes in Prices <input type="checkbox"/>	Large Scrollbars <input type="checkbox"/> Automatic Receipt Printing <input type="checkbox"/> Display Category Pictures <input type="checkbox"/>
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Hardware Proxy / PosBox

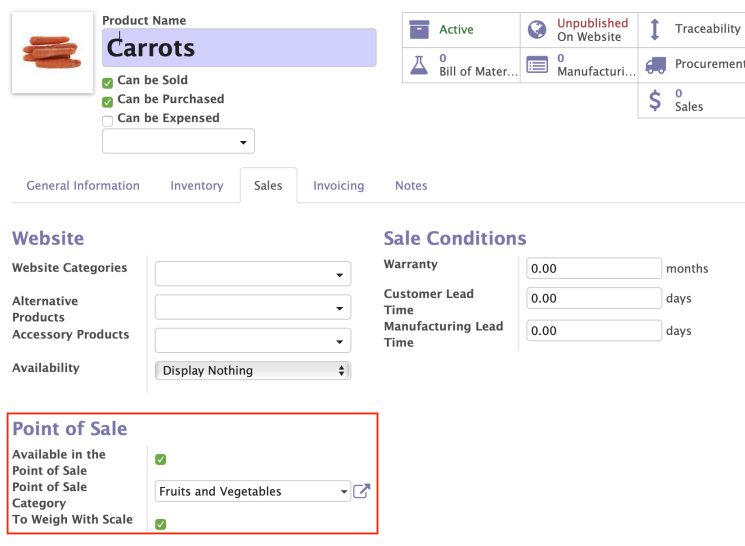
IP Address	<input type="text"/>
Receipt Printer	<input type="checkbox"/>
Barcode Scanner	<input type="checkbox"/>
Electronic Scale	<input type="checkbox"/>

Adding New Products to the POS

Point of Sale > Orders > Product

Under the Sales tab you will see the configuration related to the Point of Sale

- **Available in the Point of Sale:** to be able to sell the product using the POS.
- **Point of Sales Category:** on group fo product category does the product belongs to.
- **To Weigh with Scale:** if the product is a weighted product when selling fruits, vegetables etc...



The screenshot shows the configuration page for a product named 'Carrots'. The 'Point of Sale' section is highlighted with a red box. It contains the following settings:

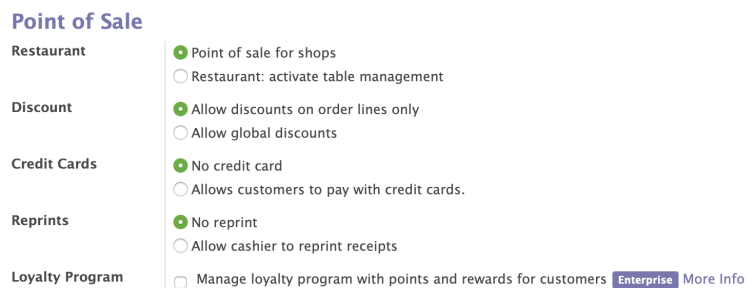
- Available in the Point of Sale:** ☒
- Point of Sale Category:** Fruits and Vegetables (dropdown menu)
- To Weigh With Scale:** ☒

Other visible settings include 'Website Categories', 'Alternative Products', 'Accessory Products', 'Availability', 'Sale Conditions', 'Warranty', 'Customer Lead Time', and 'Manufacturing Lead Time'.

Miscellaneous POS Configurations

Point of Sale > Configuration > Settings

You can find some useful and important settings like activating card payment, activating restaurant mode, etc...



The screenshot shows the 'Point of Sale' settings page. The 'Restaurant' section is selected, showing the following options:

- Restaurant:**
 - ☒ Point of sale for shops
 - ☐ Restaurant: activate table management
- Discount:**
 - ☒ Allow discounts on order lines only
 - ☐ Allow global discounts
- Credit Cards:**
 - ☒ No credit card
 - ☐ Allows customers to pay with credit cards.
- Reprints:**
 - ☒ No reprint
 - ☐ Allow cashier to reprint receipts
- Loyalty Program:**
 - ☐ Manage loyalty program with points and rewards for customers [Enterprise](#) [More Info](#)

- **Restaurant** version POS: here you can design you own floor plan in your restaurant

- **Discount:** to allow discount per lines or global to all selling products
- **Credit Cards:** if you would like to accept credit card as payment method.

Note: You need to create a separate Journal and Payment Method for the credit card.

- **Receipts:** to allow re printing of receipt for customer request.

POS Sales Management

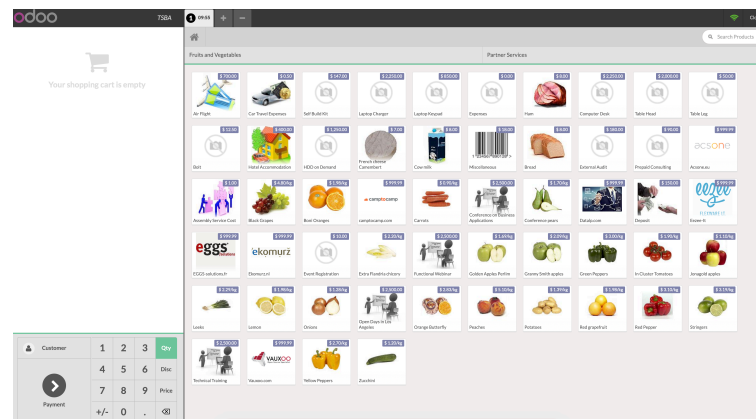
Making an Order

Once the user you login to POS, the main dashboard will be like below. <Create> a new **Session** or <Resume >an existing Session to make an order

Point of Sales > Dashboard



- Click on the product to add to Cart (the amount will be updated automatically)
- Use <QTY> button to enter no of quantities
- Use <Price> button to enter price manually
- Use <Disc> button to allow discount
- Click on <Payment> button to proceed to payment.



- Choose the payment method from list.
- Click <Validate> to generate invoice.

- Click on <Customer> to select a customer from your system
- Use <Invoice> option to generate invoice against the customer.
- Once the validate button is clicked system generate invoice.

The screenshot shows a 'Payment' screen with a light gray background. At the top left is a '<< Back' button, and at the top right is a 'Validate >>' button. The title 'Payment' is centered at the top. Below the title, on the left, is a box labeled 'Cash (USD)'. In the center, the amount '\$ 3.75' is displayed in large green font, with the text 'Please select a payment method.' below it. To the right of the amount is a numeric keypad with buttons for digits 1-9, 0, a decimal point, and a backspace icon. Below the keypad are two buttons: 'Customer' with a person icon and 'Invoice' with a document icon.

POS Report

Point of Sales > Reports

POS Order report analysis a detailed report for all order taken using the POS per product, date/period, per Payment method etc...