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Performing a Sale in Odoo POS System

What is this for?

This article explains how to perform a sale in the Odoo POS system. By the end of this article, you'll know how to sell a product, process payments, and record a sale in Odoo POS.

Before you Begin

- Ensure the following product configuration steps are completed before proceeding with a sale:

Create Products in Odoo

- Launch Odoo.
- Click **Point of Sale**.

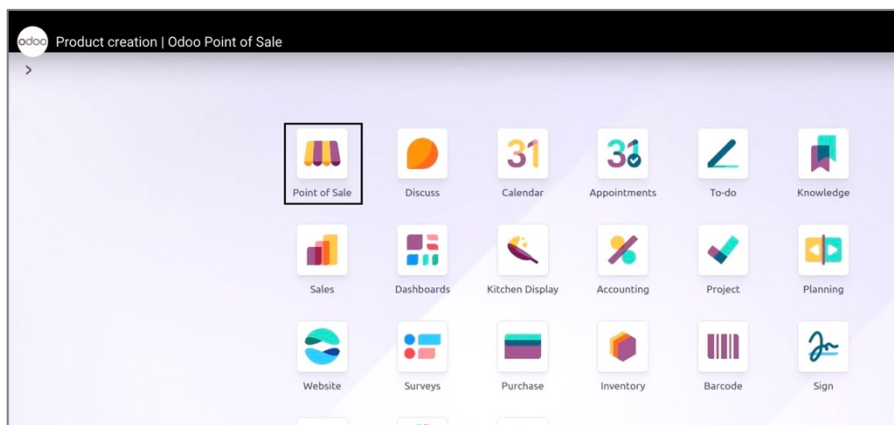


Fig1. Select POS Module

- Go to **Products** → **Products**.
- Select **New**.
- Go to **General Information** tab.

- Enter the following product details:
 - **Product Name** - The name of the product.
 - **Product Type** - The type of the product. For eg: Goods, Services, Combo
 - **Sales Price** - The price at which the product is sold.
- Upload an image for the product and include a product description.

Create Product Categories

- Go to **Point of Sale → Configuration → POS Product Categories**.
- Click **Create**.
- Enter a suitable name in the **Category** field.
- Go to **Point of Sale → Products → Products**.
- Go to **Point of Sale** tab and fill in the **Category** field under the **Point of Sale** section with one or multiple POS categories.

Make Products Available in POS

- Go to **Point of Sale → Products → Products**.
- Select a product.
- Tick the **Point of Sale** checkbox at the top.

User Roles with Access Permissions

- Cashier
- POS User
- POS Manager
- Supervisor

How to Sell a Product?

Step1: Start a POS Session

- Launch Odoo.
- Go to **Point of Sale**.
- Choose a store.
 - **Example:** Retail or Restaurant.
- Click **Open Register**.
 - **Warning:** Orders cannot be created without starting a new session.

Step 2: Add Product to Cart

- Select product category.
- Add the product to the cart.

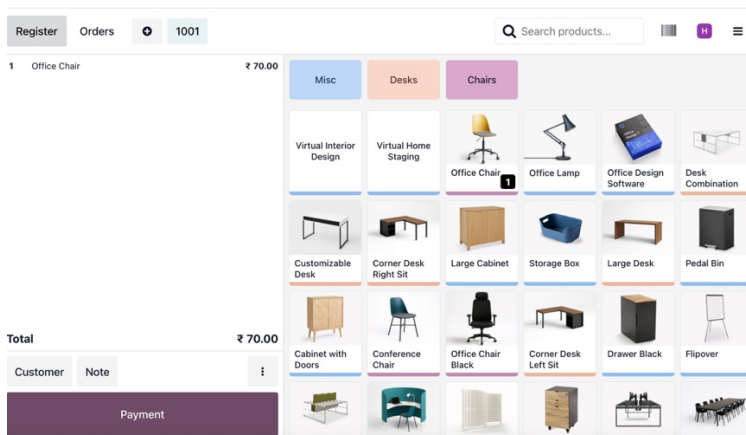


Fig 2. Add Items in Cart

- Adjust the quantities, modifiers, and addons.

- **Warning:** Ensure a product does not have \$0 price before adding to the cart.

Step 3: Review Order

- Verify the product price, taxes applied, and quantity.
 - **Tip:** Double-check product details before proceeding to payment.

Step 4: Complete the Payment

- Click **Payment**.
- Select payment method: Cash, Card, or Other.
- Click **Validate** after choosing the payment method. The order is complete.

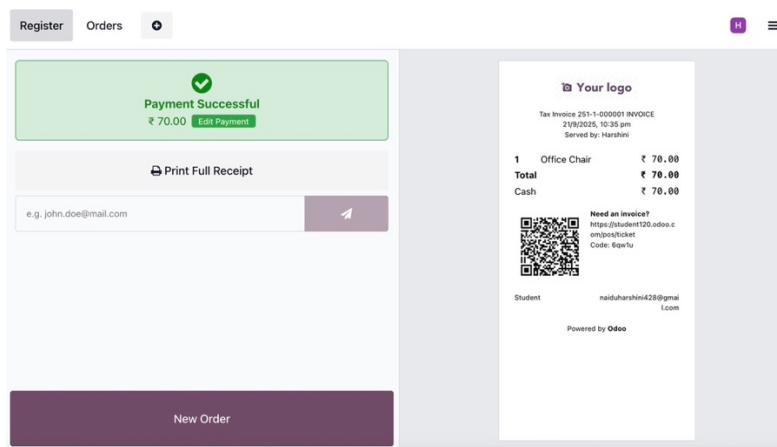


Fig 3. Payment Success

- Click **New Order** to proceed with another order.
 - **Note:** It is recommended to print receipt before creating a new order.

Step 5: Generate Receipt and Close Session

- Print or email the receipt.
- Close the order.

- **Note:** Confirm the customer receives a copy of the receipt.

Additional Resources

- [Odoo POS Product Configuration](#)
- [Odoo POS Tutorials](#)
- [Odoo POS User Docs](#)
- [Contact Odoo POS Support](#)

Generating a Report in Odoo POS System

What is this for?

This article explains how to generate a report in the Odoo POS system. By the end of this article, you'll know how to create reports, customize, and export them to further analyze and gain insights from the statistics.

Before you Begin

Ensure you are aware of the following details before generating a report:

Understand Report Types

Odoo POS system has the following reports:

- **Orders Analysis Report** - Provides detailed information on orders created during a session.
- **Sales Details Report** - Summarizes sales transactions.
- **Session Report** - Provides detailed information on all activities within a POS session.
- **Preparation Time Report** - Provides information on the time taken to prepare each order.

Data Availability

Note: An active POS session must be available to generate a report.

Product Configuration Accuracy

- Verify if the products are configured with accurate prices, taxes, and categories.
- If refunds and returns are processed during a session, ensure that the details are captured accurately.

User Roles with Access Permissions

- POS Manager
- Business Analyst
- Supervisor

How to Generate a Report?

Step 1: Select Report Type

- Launch **Odoo**.
- Go to **Point of Sale**.
 - **Note:** Reports can be generated only when there is an ongoing session.
 - If there is no active session, start one and then proceed.
- Click **Reporting**.
- Select the appropriate type of report you want to generate from the available options.

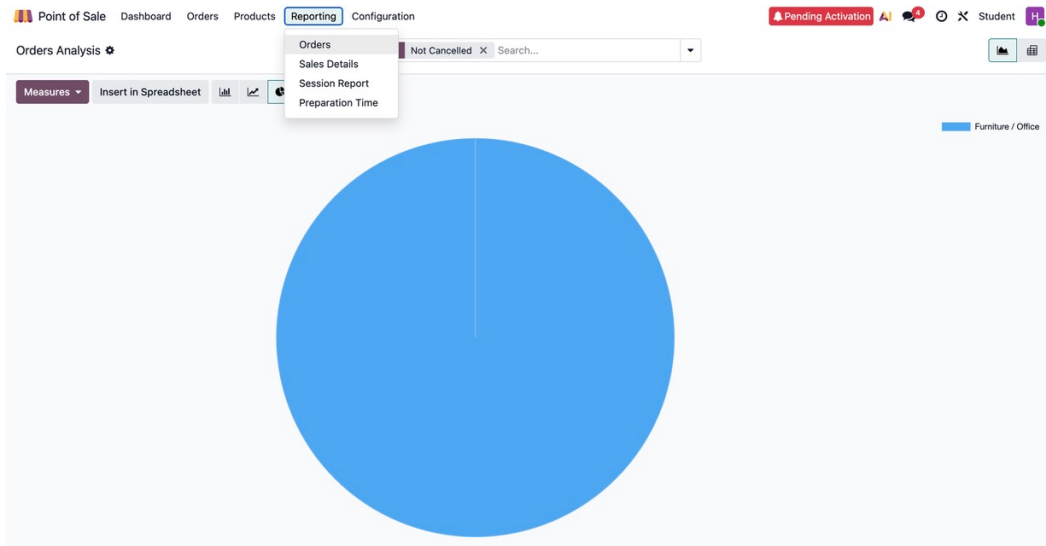


Fig 4. Select Reporting

Step 2: Provide Input to Generate Report

For Sales Details Report

- Select the start and end date in the calendar.
 - **Note:** The current date is selected by default.
- Click **Apply**. A summary of the transactions performed on the selected date appear.
- Click **Print**. The report is printed and downloaded as a **.pdf** file.

For Session Report

- Select the POS session from the prompt.
- Click **Print**. The report is printed and downloaded as a **.pdf** file.
 - **Note:** If no transactions were performed during a session, the *No Data to Display* message appears.

- Input need not be provided to generate **Order Details** and **Preparation Time** reports.

Step 3: Customize Reports

- Click **Measures** to customize the generated report.
- Click **Ascending** or **Descending** to group the values in the report.

Step 4: Export and Visualize Reports

- Click **Insert in Spreadsheet** to export the report to a worksheet in your system.
- Click **Bar Chart**, **Pie Chart**, or **Line Chart** to visualize the report.

Additional Resources

- [Odoo POS Reporting](#)
- [Odoo POS Tutorials](#)
- [Odoo POS User Docs](#)
- [Contact Odoo POS Support](#)

Updating Inventory in Odoo POS System

What is this for?

This article explains how to update inventory in the Odoo POS system. Inventory updates help the POS system stay up to date with product quantities on the shelves.

By the end of this article, you'll know how to adjust product stock levels, track stock movements, and ensure inventory accuracy in Odoo POS.

Before You Begin

Ensure the following steps are completed before updating the inventory:

Make Product Available in Odoo

- For each unit of the product available in the stock, create an equivalent in Odoo POS
- The product must be created with accurate prices, taxes, categories, and quantities.
- Tick the **Point of Sale** checkbox at the top of the product.
 - **Warning:** Mismatch between physical product counts and instances of the product in the system may lead to oversold products, unreported stock-outs, and incorrect reporting.

User Roles with Access Permissions

- Inventory Manager
- Supervisor
- POS Manager

How to Update Inventory?

Step1: Go to Inventory Module

- Launch **Odoo**.
- Select the **Inventory** module
 - **Warning:** Ensure you are logged into the right store.

Step 2: Create Inventory Adjustments

- Go to **Operations → Physical Inventory → Adjustments → Physical Inventory**.

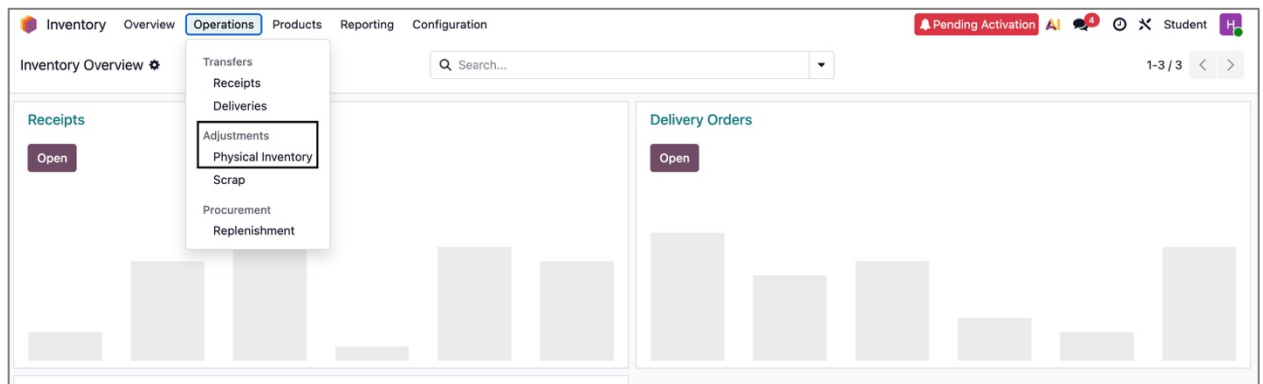


Fig 5. Select Adjustments in Inventory Module

The **Inventory Adjustments** page lists all products that are currently in stock.

- Click **New**.
- Select a product under the product column.
- Set the value of the product in the **Counted Quality** column.
- Click **Apply** on the far right of the page to create an adjustment.

Step 3: Validate Adjustment

- Check the counted quantity, on-hand quantity, and difference amounts,
 - **Note:** If the **Counted Quantity** is greater than the **On Hand Quantity**, the value in the **Difference** column is **green**. If the **Counted Quantity** is less than the **On Hand Quantity**, the value in the **Difference** column is **red**. If the quantities match, and have not been changed at all, no value appears in the **Difference** column.

Step 4: View Adjustment History

- Click **History** to view the adjustment history.
- The user who performed the count is listed in parenthesis in the **Reference** field, while the user who applied the count is listed in the **Done By**.
 - **Note:** If the POS system is offline, the changes are cached and synced with the server later.
 - **Warning:** Sync failure may result in count mismatch, resulting in cashiers selling stuff that is not in stock.

Additional Resources

- [Odoo POS Inventory Adjustments](#)
- [Odoo POS Tutorials](#)
- [Odoo POS User Docs](#)
- [Contact Odoo POS Support](#)

Applying Promotions, Discounts, and Offers in Odoo POS System

What's This For?

Loyalty programs, promotional offers, and discounts encourage customers to keep returning to your shop, or restaurant.

By the end of the article, you'll know how to apply discounts, set up loyalty points for redemption, and apply promotions fairly in Odoo POS.

Before You Begin

Ensure the following steps are completed before you proceed to apply discounts:

Availability of Customer Records

- Customers are registered and their records are readily accessible.
 - **Warning:** Discounts can be applied only if a customer record is tagged to a check.

Active Loyalty Programs in Odoo POS

- The loyalty programs must be enabled to be applied on the orders.
 - **Note:** To activate loyalty programs, go to **Point of Sale → Configuration**.
 - Tick the **Loyalty Program** checkbox under **Pricing**.

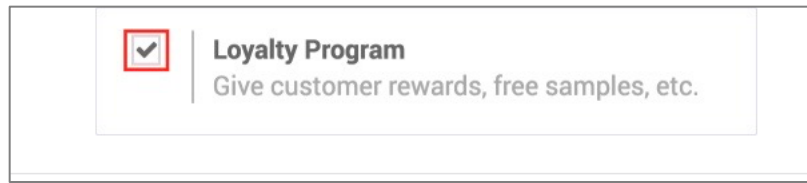


Fig 6. Activate Loyalty Program

- The following loyalty programs are available in Odoo POS:
 - **Points-Based:** Customers get a point for each purchase.
 - **Discount-Based:** Customers receive discounts when they've reached a purchase limit.
 - **Rewards:** Customers can accumulate points and get rewarded based on the points they've collected for purchases.
 - **Tiered Loyalty:** Customers are split into Bronze, Gold, and Platinum tiers based on their purchase history and rewarded accordingly.

User Roles with Access Permissions

- POS Manager
- Supervisor
- Front-Desk Staff

How to Apply Discounts/Loyalty Programs?

Step1: Start a POS Session

- Launch Odoo.

- Go to **Point of Sale**.
- Choose a store.
 - **Example:** Retail or Restaurant.
- Click **Open Register**.
 - **Tip:** Ensure the right store, location, and user role is selected.
 - **Warning:** Discounts or loyalty programs cannot be applied without an active POS session.

Step 2: Add Products to Cart

- Select product category.
- Add products to the cart.
- Adjust the quantities, modifiers, and add ons.
 - **Warning:** Ensure a product does not have \$0 price before adding to the cart.

Step 3: Link Customer to Order

- Click **Customer** on the **Order** screen.
- Select an existing customer record or create a new one.
 - **Note:** This step is required for applying loyalty programs only and not discounts.

Step 4: Apply Discounts/Loyalty Programs

- Click **Discount** in the **Order** screen to apply it on the order (or) click **Rewards** to apply loyalty programs. The order price is instantly updated.

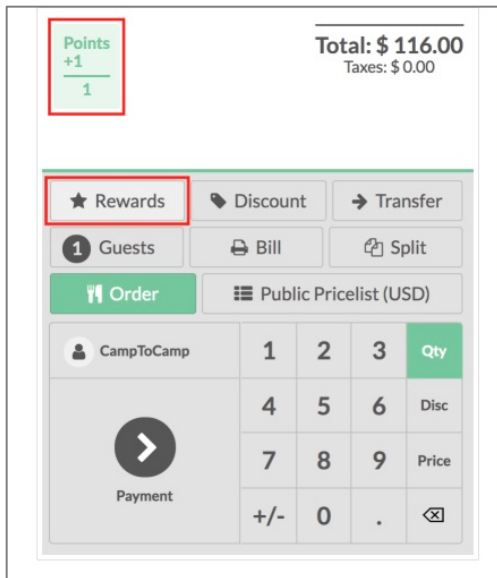


Fig 7. Apply Loyalty Points

- **Warning:** Discounts and loyalty programs cannot be applied together on the same order.

Step 5: Complete the Payment

- Click **Payment**.
- Select payment method: Cash, Card, or Other.
- Click **Validate** after choosing the payment method. The order is complete.

Additional Resources

- [Odoo POS Loyalty and Discounts](#)
- [Odoo POS Tutorials](#)
- [Odoo POS User Docs](#)
- [Contact Odoo POS Support](#)