

## POINT OF SALE

The retail mode of sale application by Odoo. This module allows the user to integrate their retail operations of the company with Odoo. This functionality can be accessed remotely using various connected devices. In addition, a real time integration with the company inventory would be an added advantage in the retail operation. The module provides the user with both front end and back end usability where the modification made in either aspect is auto detected in the other.

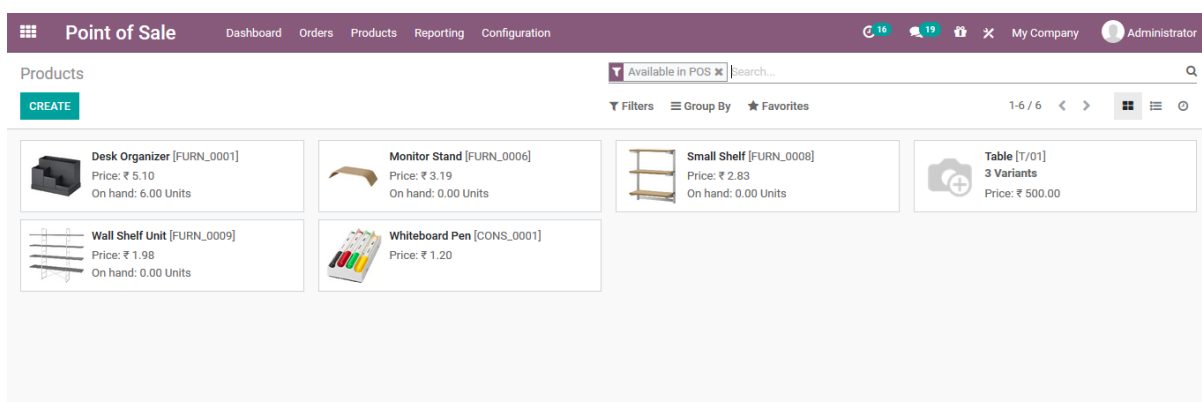
The point of sale module can be configured for the operations of a restaurant or a shop too with the adequate tools available in the Odoo platform. The Odoo platform restaurant or bar management will allow users to run a hotel effectively. One of the other main features of the Odoo POS module is that it can be run in offline mode and the real time operations are easily managed.

### Products

The product described in the platform can be enabled to be used in retail operations. The user can also choose to disable it only for the POS aspect and run it in the company business. The product description in the POS can be done in the same way of that being described in the purchase module of the platform.

### Product creation

Below image shows the product window of the POS platform and the filtering of products available in POS is auto applied. The user can close these filtering aspects to view all the products. New products in the POS module can be created by selecting the create option. The products created here will be auto created in the company products description.



In the product creation window under the point of sale menu the user will be able to enable it for the POS aspects and assign the category. The rest of the menu aspects can be defined as the same as in the purchase management aspects of the platform. The descriptions can be viewed in the purchase management part of the Odoo books.

Point of Sale

DashboardOrdersProductsReportingConfiguration

1619My CompanyAdministrator

Products / New

SAVEDISCARD

Go to Website

Product Moves

0.00 Units Sold

0 Bill of Materi...

Putaway Rules

0 Quality Points

0.00 Units Purchased

Product Name

Product Name

Can be Sold

Can be Purchased

Can be Expensed

General Information

Variants

Sales

Point of Sale

eCommerce

Purchase

Inventory

Accounting

Available in POS

Category

To Weigh With Scale

Product variants

The product variants descriptions can be viewed in the product variants menu accessible from the products tab of the platform. The product variants can be described in the by using the creation window which will direct to the product creation of the respective module and the product allocation can be made.

Point of Sale

DashboardOrdersProductsReportingConfiguration

1619My CompanyAdministrator

Product Variants

CREATE

Available in POS

Search...

FiltersGroup ByFavorites

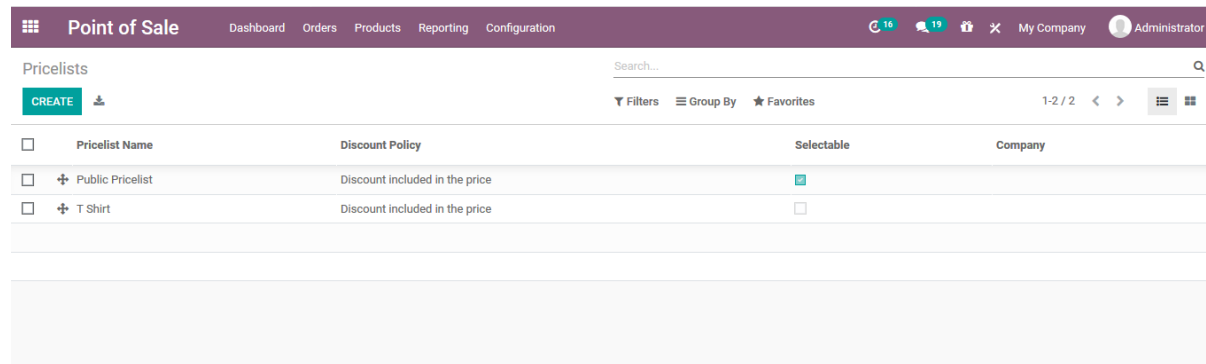
1-8 / 8

<input type="checkbox"/> Internal Reference	Name	Attribute Values	Sales Price	Cost	Quantity On Hand	Forecasted Quantity	Unit of Measure	
<input type="checkbox"/> CONS_0001	Whiteboard Pen		1.20	0.00			Units	
<input type="checkbox"/> FURN_0001	Desk Organizer		5.10	0.00	6.00	6.00	Units	
<input type="checkbox"/> FURN_0006	Monitor Stand		3.19	0.00	0.00	0.00	Units	
<input type="checkbox"/> FURN_0008	Small Shelf		2.83	0.00	0.00	0.00	Units	
<input type="checkbox"/> FURN_0009	Wall Shelf Unit		1.98	0.00	0.00	0.00	Units	
<input type="checkbox"/>	Table	Size: M	500.00	0.00			Units	
<input type="checkbox"/>	Table	Size: XL	500.00	0.00			Units	
<input type="checkbox"/>	Table	Size: S	500.00	0.00			Units	

Pricelist

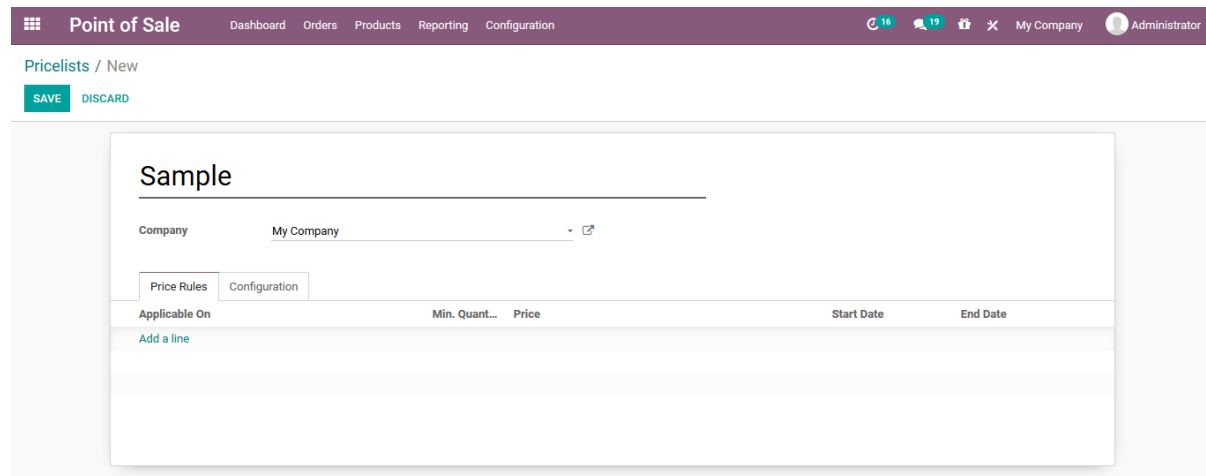
The product prices for the various groups of customers can be separately defined in the platform. The product price list option will allow the users to charge separated prices from the loyal, regular

and occasional customers. The price list menu of the PoS module can be accessed from the product tab of the module.



<input type="checkbox"/>	Pricelist Name	Discount Policy	Selectable	Company
<input type="checkbox"/>	+ Public Pricelist	Discount included in the price	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	+ T Shirt	Discount included in the price	<input type="checkbox"/>	

The user can create a new price list by selecting the create option available. In the price list creation menu the user can assign a name for the price list and allocate the company of operation. The price rules can be defined in the respective menu selecting the add a line option. The user can assign multiple pricing rules to be defined in the price list operation.



### Sample

Company: My Company

Price Rules | Configuration

Applicable On	Min. Quant...	Price	Start Date	End Date
<a href="#">Add a line</a>				

In the price list creation window the user can apply the price list on all products, product category, product and product variants. The price computation for the respective price list can be made fixed, based on percentage or formula. The minimum quantity, the duration the pricelist being active and the price, formula or the percentage can be declared based on the selection.

## All Products

Apply On

- ☒ All Products
- ☐ Product Category
- ☐ Product
- ☐ Product Variant

Min. Quantity

0.00

Start Date



End Date



## Price Computation

Compute Price

- ☒ Fixed Price
- ☐ Percentage (discount)
- ☐ Formula

Fixed Price

0.00

The computed price is expressed in the default Unit of Measure of the product.

SAVE &amp; CLOSE

SAVE &amp; NEW

DISCARD

Under the configuration tab of the price list description the user can assign the availability based on the country groups and discount policies. Under the website description the user can assign the website and the e commerce promotional code.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 19 ✕ | My Company | Administrator

Pricelists / New

**SAVE** DISCARD

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### Sample

Company: My Company

Price Rules | **Configuration**

**Availability**

Country Groups

**Website**

Website: My Website

Selectable: ☐

E-commerce

Promotional Code

**Discounts**

Discount Policy: ☒ Discount included in the price

☐ Show public price & discount to the customer

## Loyalty programs

The user can create loyalty programs which can be used in the retail operations. These loyalty programmers will provide the users with specific pricing options for a group of customers. The loyalty programs available can be viewed and new ones can be created in the loyalty program

window accessible from the products menu of the module. In the loyalty program creations windows the user can specify a name and provide the points for per dollars spent.

In the rewards menu the user can assign the loyalty rewards for the points by selecting the add a line option. In the rewards creation window the user can assign a reward name, cost and the minimum points which can be obtained. The reward can be chosen as a free product at a discount. In case of a free product the user can allocate the product in case of discount the parameter should be set. The discount product, discount application parameter, and on which product the discount should be applied on, maximum discount can be defined.

Points rules can be described in the respective menu by selecting the add a line option available. In the point rules creation menu, the user can provide a rule name, assign the base product, points per unit and the points per money spent.

Create Rules
×

Rule Name

Based on Products
Match all records

→ 45 RECORD(S)
EDIT DOMAIN

Points per Unit
0.00

Points per \$ spent
0.00

SAVE & CLOSE

SAVE & NEW

DISCARD

## Payment terminals

The Odoo platform with its integration ability to add the various payment terminals to the platform the user can select the various payment terminologies to be allocated. In the settings menu of the PoS module the user can enable the various payment terminologies switches that have been preinstalled in the platform. The payment terminals acceptable by Odoo are defined in the Odoo apps and the user can purchase the payable one and install it.

Point of Sale
Dashboard
Orders
Products
Reporting
Configuration

16
19
My Company
Administrator

Settings
Search...

SAVE
DISCARD

General Settings
CRM
Sales
Website
eLearning
Purchase
Inventory
Manufacturing
Accounting
Payroll
Project
Timesheets

☐ **Cash Rounding**  
Define the smallest coinage of the currency used to pay by cash

**Payment Terminals**

☐ **Vantiv (US & Canada)**  
Accept payments with a Vantiv payment terminal

☐ **Adyen**  
Accept payments with an Adyen payment terminal

☐ **Six**  
Accept payments with a Six payment terminal

☐ **Ingenico (BENELUX)**  
Accept payments with an Ingenico payment terminal

**Inventory**

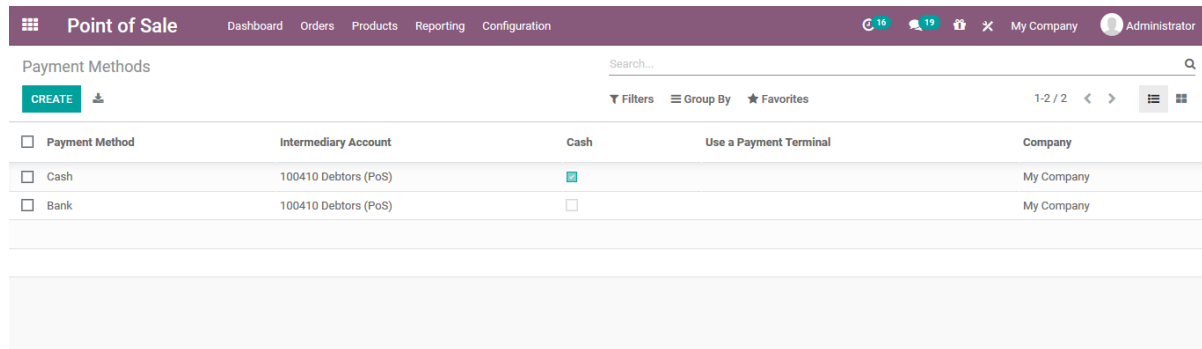
**Inventory Management**  
Update quantities in stock

☒ At the session closing (advised)

☐ In real time

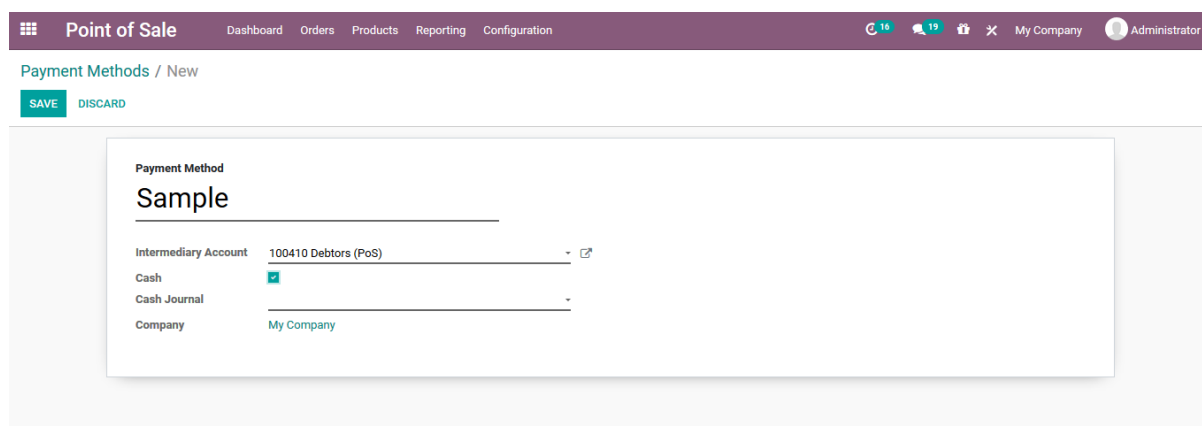
## Payment methods

The payment methods of the Point of sales can be described in the payment methods menu accessible from the configuration tab. In the menu all the payment methods described in the platform can be viewed and the user has the provision to create a new one.



<input type="checkbox"/> Payment Method	Intermediary Account	Cash	Use a Payment Terminal	Company
<input type="checkbox"/> Cash	100410 Debtors (PoS)	<input checked="" type="checkbox"/>		My Company
<input type="checkbox"/> Bank	100410 Debtors (PoS)	<input type="checkbox"/>		My Company

In the payment method creation window the user can assign a name, intermediary account, enable the cash option, allocate the cash journal and the company details.



**Payment Method**  
**Sample**

Intermediary Account: 100410 Debtors (PoS)

Cash: ☒

Cash Journal:

Company: My Company

## PoS product category

The user can create and assign product categories for the point of sale operations of the company. This categorical classification will allow the users to deal with the list of the products that are being assigned in the platform. The user can view all the point of sale product categories defined in the menu and create new ones.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 | 19 | My Company | Administrator

PoS Product Categories | Search... | Filters | Group By | Favorites | 1-3 / 3

<input type="checkbox"/>	PoS Product Category
<input type="checkbox"/> +	Miscellaneous
<input type="checkbox"/> +	Mobile Phone
<input type="checkbox"/> +	Office furniture

In the PoS product category creation window the user can assign the category name and allocate the parent category.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 | 19 | My Company | Administrator

PoS Product Categories / New | SAVE | DISCARD

Category Name

sample

Parent Category

Office furniture

## Attributes

The product variants in the platform can be defined based on the attributes being described in the platform. Wish is the same in chase of the sales and the purchase aspects of the Odoo which is similar in PoS applications. The attributes described in the platform can be viewed in the attributes menu of the module which can be accessed from the configuration tab.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 | 19 | My Company | Administrator

Attributes | Search... | Filters | Group By | Favorites | 1-2 / 2

<input type="checkbox"/>	Attribute	Display Type	Variants Creation Mode
<input type="checkbox"/> +	Size	Radio	Instantly
<input type="checkbox"/> +	Colour	Radio	Instantly

The attributes creation window will allow the users to create new ones where the user can provide the name, allocate the display type and provide the variant creation mode. In the



attributes value tab, the user can provide an attribute value by selecting the add a line option available.

## Point of sale configuration

The point of sale configuration and the operations can be defined in the point of sale menu accessible from the configuration tab of the module. In the menu the user can create the and define the various PoS sessions which can be controlled and managed in the platform. This module operation allows the user to run the retail operations of the company such as shops, restaurants or bars effectively in Odoo.

	Company
<input type="checkbox"/> Point of Sale	Company
<input type="checkbox"/> Shop	My Company

## Configuration options for your PoS sessions

The platform allows various configuration options in the PoS module which can be customized as per the user needs.

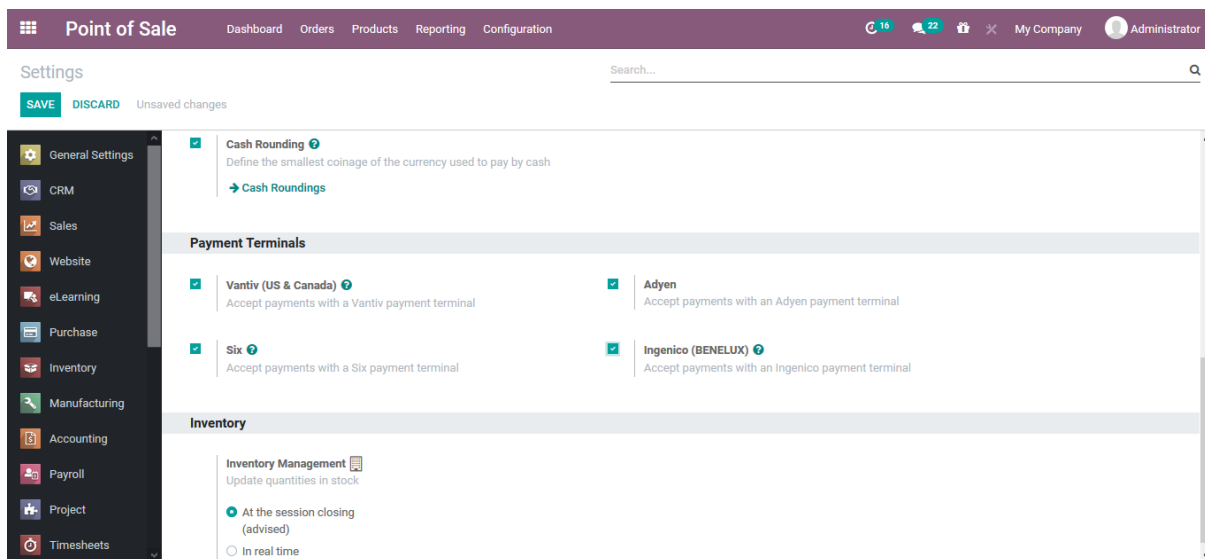
### Cash rounding

The user can allocate the cash rounding aspects of sales operations which would be much helpful in the real time operations of retail stores. This module additionally allows the cashiers to come to a conclusion in the cash rounding aspects of sales as described by the users and the company.

## Payment terminals

As you know the Odoo platform with its integration abilities will allow the user to establish third party software and devices to run along with Odoo which bring to the payment terminal aspects of the sales operation in a retail environment. The various payment terminologies can be installed and enabled in the platform from the applications and the settings menu of the platform respectively.

All the installed terminologies are displayed in the platform and the user can view under the payment terminologies menu of the settings menu, which can be enabled.



## Inventory management

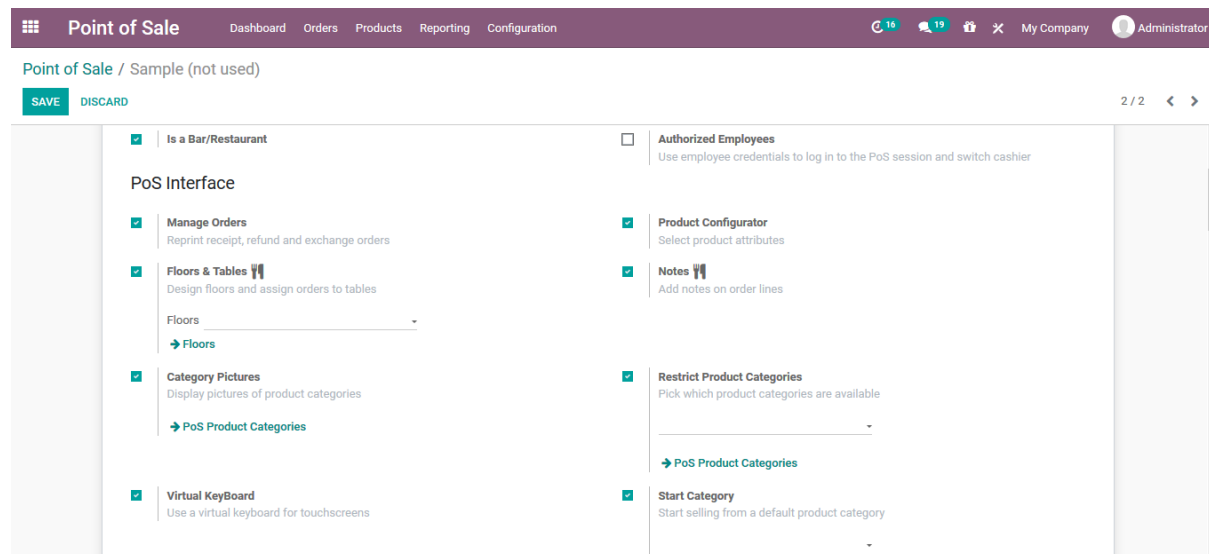
The Odoo platform PoS module can be operating in the aspects of how inventory is being described in the platform. The inventory management can be updated based on the real time operations or after every session of the PoS being closed. Under which the real time operations will be suitable as it will provide the user with an extra nudge in a retail environment.

## New PoS creation

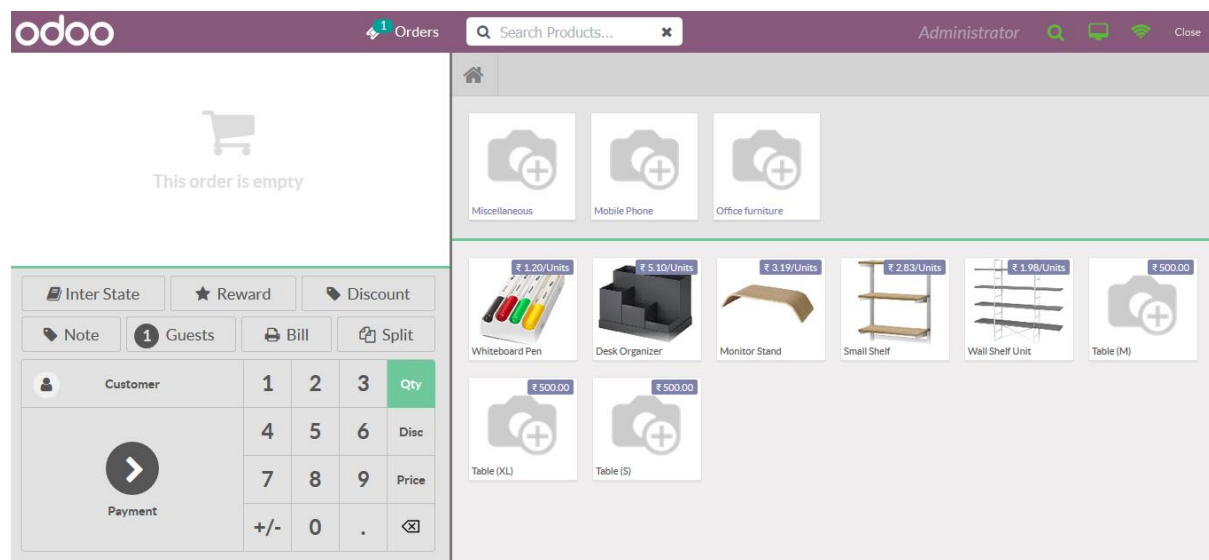
The user can create new PoS sessions in the Odoo by creating a point of sale in the module. In the PoS creation window the user can provide a name and allocate the company if the platform is used to manage multiple companies of the user. If the new PoS is a restaurant or a bar the option available can be enabled. Additionally, the employee authorization can also be enabled in the menu. Under the PoS interface the user can enable or disable the option to manage orders,

product configurator, floors and tables to be used, category pictures, virtual keyboard for device configuration operations, notes for the restaurant aspects, restrict product categories and start category form the front end.

Under the floors and tables, the user can enable the option and describe the floors and tables in the PoS setting. Additionally, the restrict product creation categories can be defined.



The below image shows the PoS module tab where the user can view the image allocated with the respective products and the virtual keyboard as being specified from the PoS module creation.



Under the connect device menu the user can enable the IoT box integration, customer display for remote operations, direct connect devices options without an IoT box and define the barcode

nomenclature for the ones being used in the platform. Moreover, a printer integration can also be made to the platform which would allow the user to print out the invoices.

As the IoT integration has been enabled the user can allocate the receipt printer, customer display, barcode scanner or card readers and the electronic scale. Additionally, the direct devices allocated can be defined with the printer description in the order printers tab.

Under the taxes menu the user can allocate the fiscal positions for the various orders and the company operations

The screenshot displays the 'Point of Sale' configuration interface. The top navigation bar includes 'Point of Sale', 'Dashboard', 'Orders', 'Products', 'Reporting', and 'Configuration'. The user is logged in as 'Administrator'. The main content area is titled 'Point of Sale / Sample (not used)' and features 'SAVE' and 'DISCARD' buttons. The 'Connected Devices' section is active, showing three main categories: 'IoT Box', 'Customer Display', and 'Order Printer'. Each category has a checkbox and a description. The 'IoT Box' section includes dropdown menus for 'Receipt Printer', 'Customer Display', 'Barcode Scanners/Card Readers', and 'Electronic Scale'. The 'Customer Display' section has a checkbox and a description. The 'Order Printer' section has a checkbox, a printer icon, and a description. The 'Direct Devices' section is also visible, with a checkbox and a description. The 'Barcodes' section includes a checkbox and a description. The 'Default Nomenclature' dropdown menu is set to 'Default Nomenclature'.

In the pricing menu the user can assign the default price list from the ones being defined in the platform. The product pricing can be made tax excluded or tax include. Manual discounts option as well as the price control, advanced pricelist and the global pricing can also be enabled. Additionally, in case of any loyalty programmers to be enabled in the platform the option can be enabled and the loyalty program can be chosen. The pricing control for restricting the product price modification can also be enabled. Moreover, the global discount specification in the form of percentage settings can be defined.

The screenshot shows the 'Pricing' configuration page in the Point of Sale system. The page has a purple header with navigation links: Dashboard, Orders, Products, Reporting, Configuration. The user is logged in as 'Administrator'. The page title is 'Point of Sale / Sample (not used)'. There are 'SAVE' and 'DISCARD' buttons. The page is divided into two main sections: 'Pricing' and 'Advanced Pricelists'.

**Pricing Section:**

- Default Pricelist:** A dropdown menu showing 'Public Pricelist (INR)' with a link to 'Pricelists'.
- Product Prices:** A section for 'Product prices on receipts' with two radio buttons: 'Tax-Excluded Price' (selected) and 'Tax-Included Price'.
- Manual Discounts:** A checkbox is checked, with the description 'Allow discounts per line'.
- Price Control:** A checkbox is checked, with the description 'Restrict price modification to managers'.

**Advanced Pricelists Section:**

- Advanced Pricelists:** A checkbox is checked, with the description 'Set shop-specific prices, seasonal discounts, etc.'. Below it, there is a dropdown menu for 'Available Pricelists' showing 'Public Pricelist (INR)'.
- Global Discounts:** A checkbox is checked, with the description 'Allow global discounts on orders'. Below it, there is a dropdown menu for 'Discount' showing '[DISC] Discount' and a text input for 'Discount %' with the value '10.00'.
- Loyalty Program:** A checkbox is checked, with the description 'Give customer rewards, free samples, etc.'. Below it, there is a dropdown menu for 'Loyalty Program'.

Under the payments menu the payment methods can be allocated for it to be cash or bank. Advanced cash control and the tags of operation can also be enabled. Under the bills and receipt the header and footer options along with the bill printing and the invoicing can be enabled. Moreover, the options for automating receipt printing as well as the bill splitting can be enabled. The invoicing journals for the invoice operation can also be specified. Additionally, the tips tag can be allocated along with the headers and footers can be defined in the header footer menu description.

The screenshot shows the 'Payments' configuration page in the Point of Sale system. The page has a purple header with navigation links: Dashboard, Orders, Products, Reporting, Configuration. The user is logged in as 'Administrator'. The page title is 'Point of Sale / Sample (not used)'. There are 'SAVE' and 'DISCARD' buttons. The page is divided into two main sections: 'Payments' and 'Bills & Receipts'.

**Payments Section:**

- Payment Methods:** A section for 'Payment methods available' with a dropdown menu showing 'Cash' and 'Bank' with a link to 'Payment Methods'.
- Tips:** A checkbox is checked, with the description 'Accept customer tips or convert their change to a tip'. Below it, there is a dropdown menu for 'Tip Product' showing '[TIPS] Tips' and a checkbox for 'Add tip after payment (North America specific)'.

**Bills & Receipts Section:**

- Header & Footer:** A checkbox is checked, with the description 'Add a custom message to header and footer'. Below it, there are text input fields for 'Header' (e.g. Return Policy, Thanks for shopping with us!) and 'Footer'.
- Advanced Cash Control:** A checkbox is checked, with the description 'Control cash box at opening and closing'. Below it, there is a text input for 'Authorized Difference' with the value '0.00'.
- Automatic Receipt Printing:** A checkbox is checked, with the description 'Print receipts automatically once the payment is registered'. Below it, there is a checkbox for 'Skip Preview Screen'.

In the inventory menu the operation type can be specified from the ones being defined in the platform. Additionally, in the accounting menu the journal can be specified for the sales operations being conducted. In the sales reporting menu, the sales team for the operation can

be described and the allocation can be made based on the sales team described in the sales module of the platform.

The screenshot shows a configuration window titled "Point of Sale / New" with "SAVE" and "DISCARD" buttons. The window is divided into three main sections:

- Inventory:**
  - Operation Type:** Operation type used to record product pickings. Products will be taken from the default source location of this operation type. The selected value is "San Francisco: PoS Orders".
- Accounting:**
  - Journal Entries:** Configuration for journal entries of PoS orders. The selected value for "Sales Journal" is "Point of Sale".
- Sales Reporting:**
  - Sales Team:** Sales are reported to the following sales team. The selected value is "Team a".

## Orders

The user can view the orders being created in the PoS module under the orders menu accessible from the orders tab of the module. The order reference number, session, date, receipt numbers, customer details, employee who conducted the sales, total amount and the status of the sales order are described.

The screenshot shows the "Orders" list in the Point of Sale module. The table has the following columns: Order Ref, Session, Date, Receipt Number, Customer, Employee, Total, and Status. A single order is listed with a status of "Paid".

Order Ref	Session	Date	Receipt Number	Customer	Employee	Total	Status
Shop/0001	POS/00001	09/19/2020 00:28:37	Order 00001-001-0001			₹ 15.11	Paid

Summary: 15.11

## Session

The PoS sessions conducted in the platform can be viewed from the sessions menu accessible from the orders tab of the module. In the session details the session ID, point of sale, assigned person, date and duration for closing and opening the session and the status of the session is described.

Point of Sale						16	19		My Company	Administrator
Sessions						Search...				
						Filters Group By Favorites				
						1-1 / 1				
Session ID	Point of Sale	Opened By	Opening Date	Closing Date	Status					
POS/00001	Shop (Administrator)	Administrator	09/19/2020 12:21:25		In Progress					

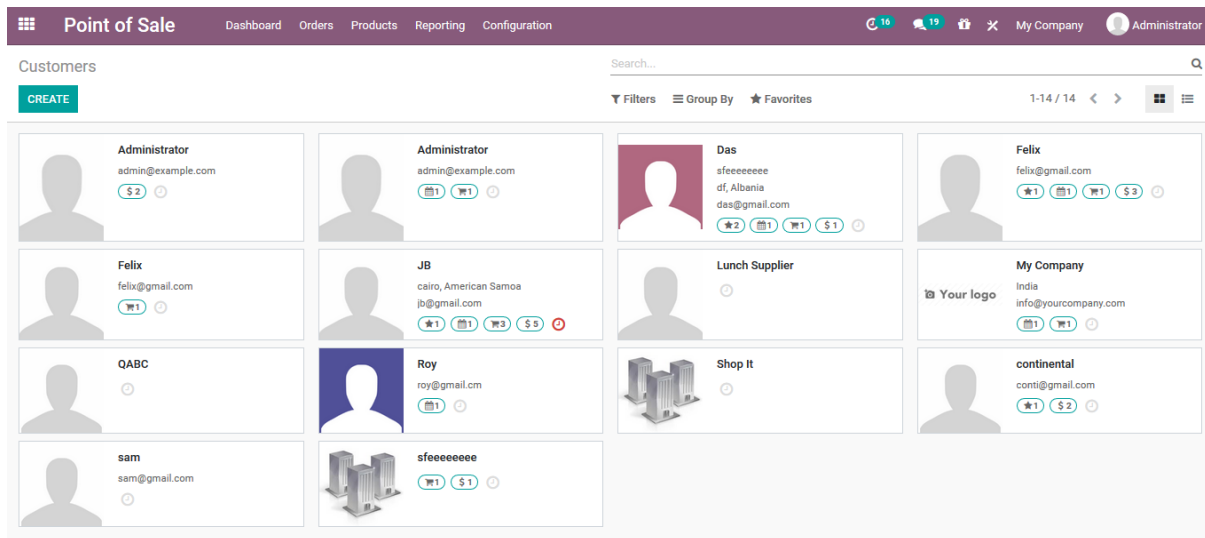
## Payments

The payments credited on the PoS operations being conducted has been defined. The payment description can be viewed from the payments menu accessible from the orders menu. In the payment description the date and duration of the payment, payment method, order and the amount are being described.

Point of Sale						16	19		My Company	Administrator
Payments						Search...				
						Filters Group By Favorites				
						1-1 / 1				
Date	Payment Method	Order	Amount							
09/19/2020 00:28:37	Cash	Shop/0001	₹ 15.11							

## Customers

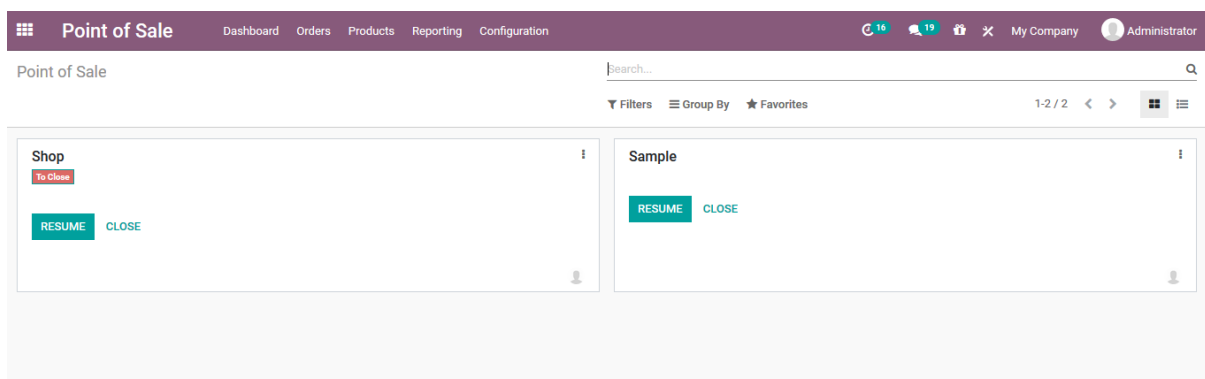
The customer defined in the platform can be described. The ones obtained through the PoS session can be filtered and based on various other filtering operations can be viewed. The user also has the provision to new customers by using the creation window same as available in the sales operation.



## Create sales in a PoS session

The Odoo platform allows the users to create and run the PoS operations in the mode of sessions. The user can create various PoS sessions and run in with the operations. The platform also provides provision for the user to pause and stop a session. In addition, the user can operate and run multiple PoS sessions from the platform.

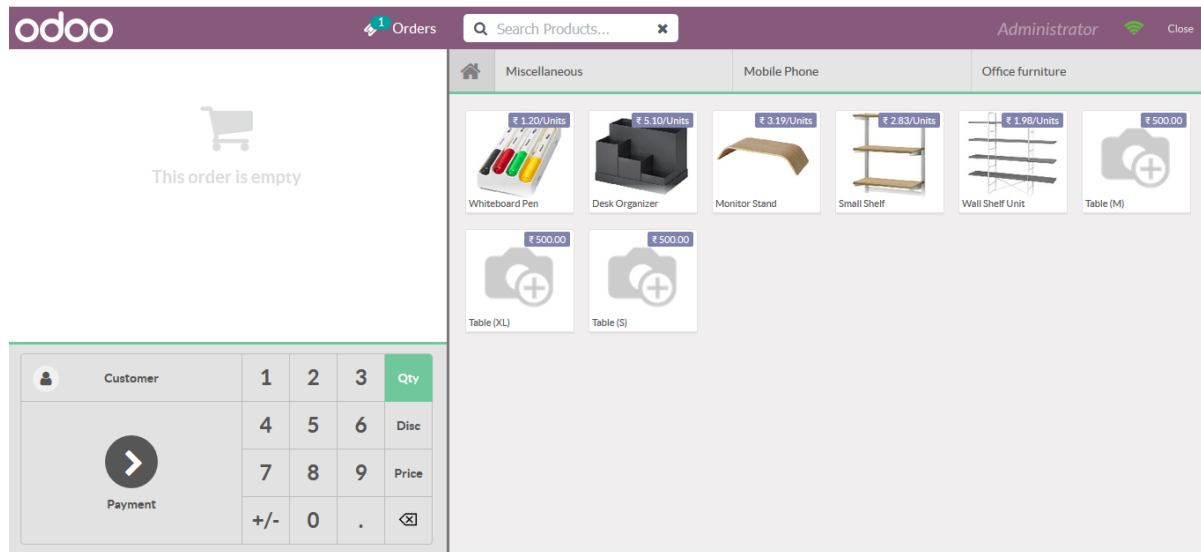
To run the PoS session the user can select the respective PoS being defined and operational in the PoS home dashboard. In the home dashboard all the PoS sessions available at the user's disposal will be mentioned. The user can either select a new session or resume the existing one. Additionally, there is provision for the user to stop the sessions as per the need.



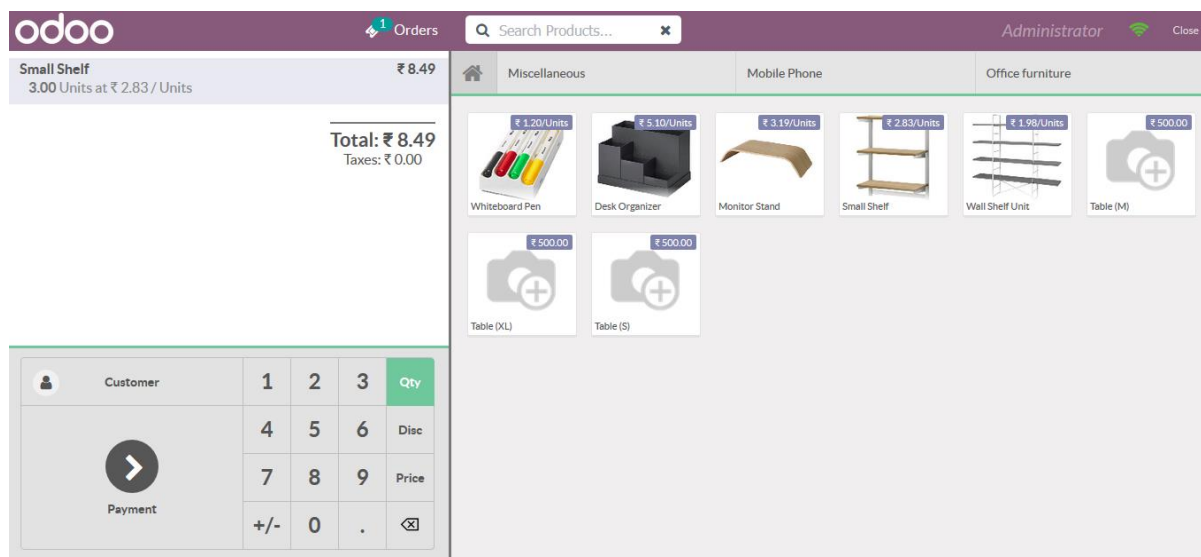
On selecting the respective session to resume or start the platform will start to load the operations. This will take a few seconds as the platform will load the session with all the assets and attributes being defined in the back end.



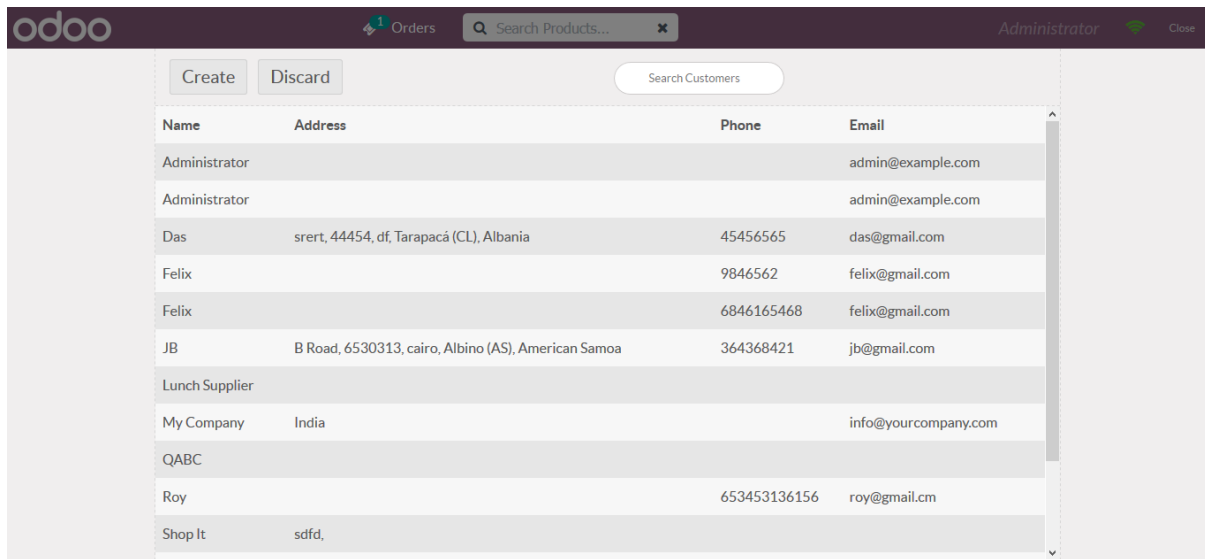
Once the session is being loaded in the name screen the user can view the sales window where all the products described in the PoS are being displayed. The products are described with the unit prices as per the description.



The user can select the product by clicking on them and this will be attached to the bill. In order to add multiple quantities of the same product the user can click on the same product again.

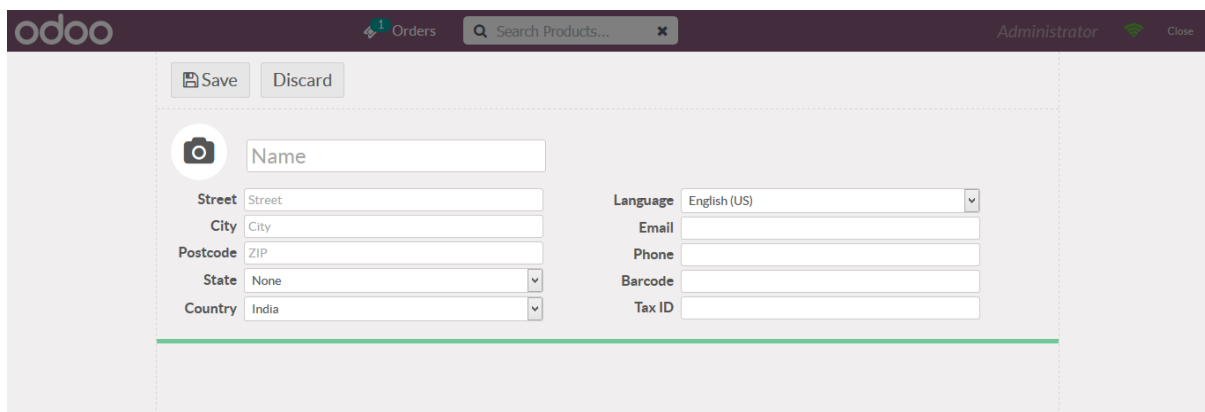



To allocate the customer the user can select the customer icon available and the user will be depicted with the customer selection window. The user can choose from the last available and if the customer is a new one the user can select the create option available



Name	Address	Phone	Email
Administrator			admin@example.com
Administrator			admin@example.com
Das	srert, 44454, df, Tarapacá (CL), Albania	45456565	das@gmail.com
Felix		9846562	felix@gmail.com
Felix		6846165468	felix@gmail.com
JB	B Road, 6530313, cairo, Albino (AS), American Samoa	364368421	jib@gmail.com
Lunch Supplier			
My Company	India		info@yourcompany.com
QABC			
Roy		653453136156	roy@gmail.cm
Shop It	sdfd,		

On selecting to create the customer the user will be depicted with the following window where the user can provide the customer name address as well as the contact details allocated with the taxation details.





Street

City

Postcode

State

Country

Language

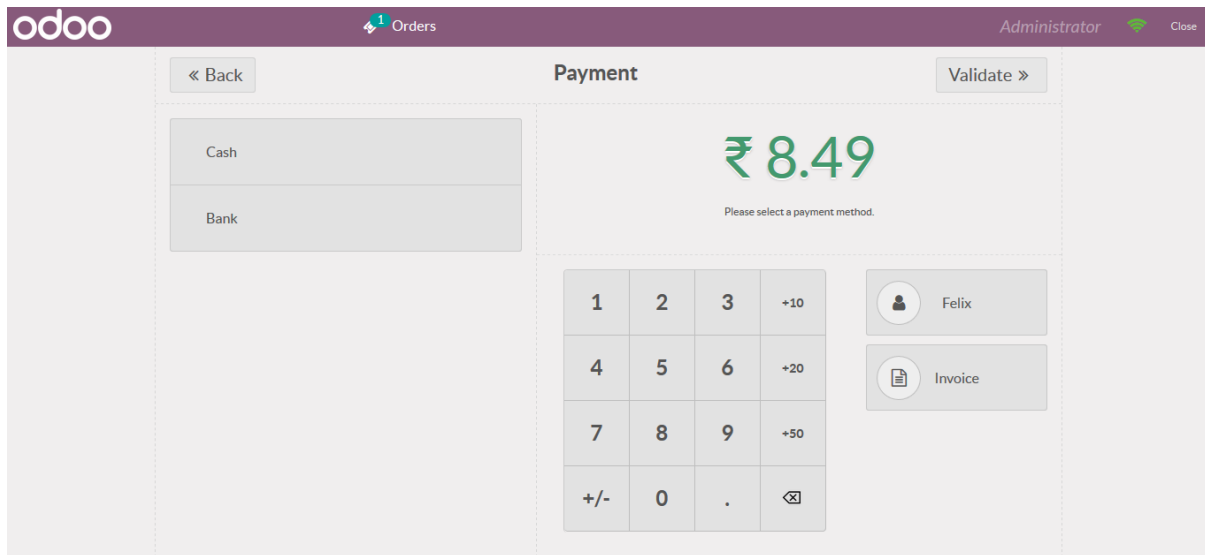
Email

Phone

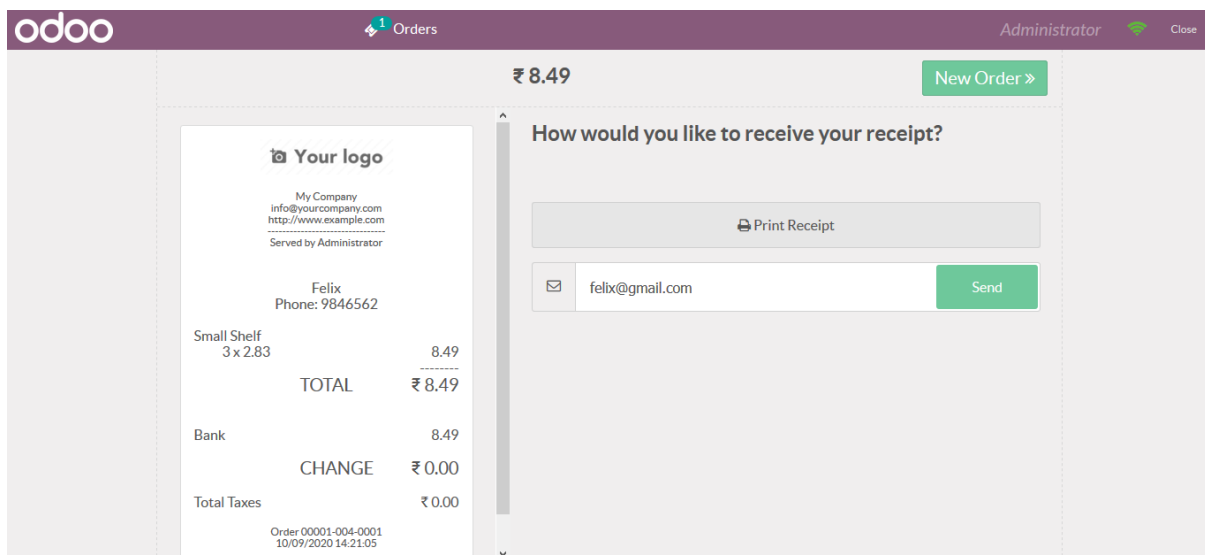
Barcode

Tax ID

If the customer is selected the user can now turn to the payment section by selecting the payment option available in the sales menu. On which the user will be directed to the window as shown below. The payments can be made using the cash or the bank option available. On selecting the payment through cash or bank the user can specify the amount being provided and if its verified the user can select the validate option available.



On selecting the validate option the user will be depicted with the following window where he/she can verify the sales invoice and send the invoice via email by provisioning and verifying the email address being auto generated as per the description provided in the customer information.



## Creating restaurant PoS session

The Odoo platform allows the user to configure the restaurant as well the bar options to deal in the PoS operations. The Odoo platform has a separate support module which can be installed from the application menu of the Odoo. The restaurant as well as the bar's operational module can be installed from this window.

To configure the restaurant or bar operation the user can create a new PoS operation in the back end of the module. In the creation windows provide the name of the operations and enable the bas /restaurant option. If the floors and the tables are enabled the user can configure the floors by selecting the mu option available.

The screenshot shows the 'Point of Sale' configuration window for 'Restaurant / Bar'. The window has a purple header with navigation tabs: Dashboard, Orders, Products, Reporting, and Configuration. The breadcrumb trail is 'Point of Sale / Restaurant / Bar (not used)'. Below the header, there are 'EDIT' and 'CREATE' buttons. The main content area is titled 'Restaurant / Bar' and contains several configuration options:

- Company:** My Company
- Is a Bar/Restaurant:** ☒
- Authorized Employees:** ☒ Use employee credentials to log in to the PoS session and switch cashier
- PoS Interface:**
  - Manage Orders:** ☒ Reprint receipt, refund and exchange orders
  - Product Configurator:** ☒ Select product attributes
  - Floors & Tables:** ☒ Design floors and assign orders to tables
    - Floors: [Floors](#)
  - Notes:** ☒ Add notes on order lines
  - Category Pictures:** ☒ Display pictures of product categories
  - Restrict Product Categories:** ☐ Pick which product categories are available

In the floors menu select the create option and the user will be depicted with the following menu to provide the description. Provide the floor name and allocate the point of sale which it's been associated with.

The screenshot shows the 'Point of Sale' configuration window for 'Floor Plans / New'. The window has a purple header with navigation tabs: Dashboard, Orders, Products, Reporting, and Configuration. The breadcrumb trail is 'Point of Sale / Restaurant / Bar (not used) / Floor Plans / New'. Below the header, there are 'SAVE' and 'DISCARD' buttons. The main content area is titled 'Floor Plans / New' and contains a form with the following fields:

- Floor Name:** Level 1
- Point of Sale:** Restaurant / Bar (not used)
- Table Name:** Add a line
- Seats:**
- Shape:**

The user can add the tables by selecting the add a line option available. In the menu depicted the user can provide the table name and the number of seats allocated with it.

Create Tables

Table Name

ONE

Seats

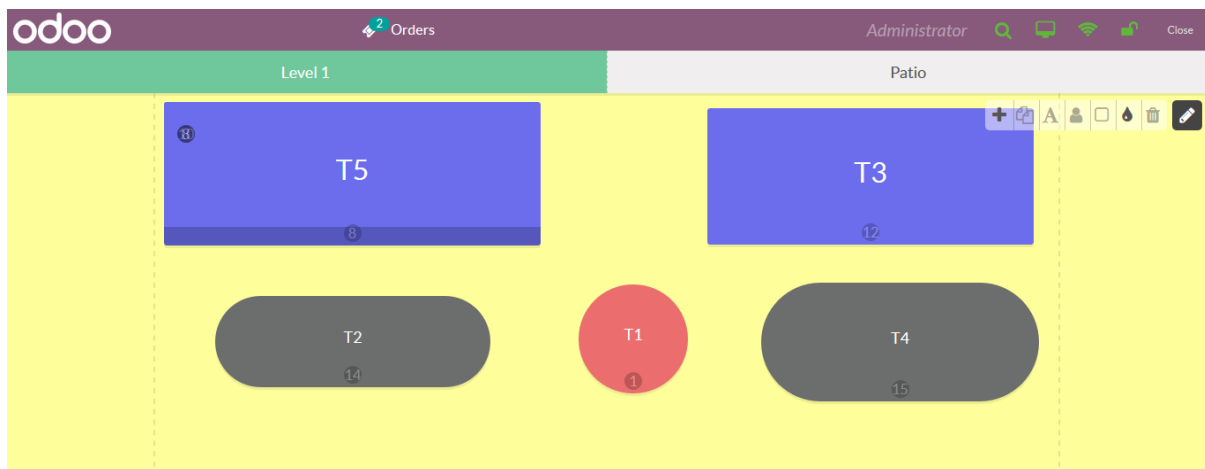
8

SAVE & CLOSE

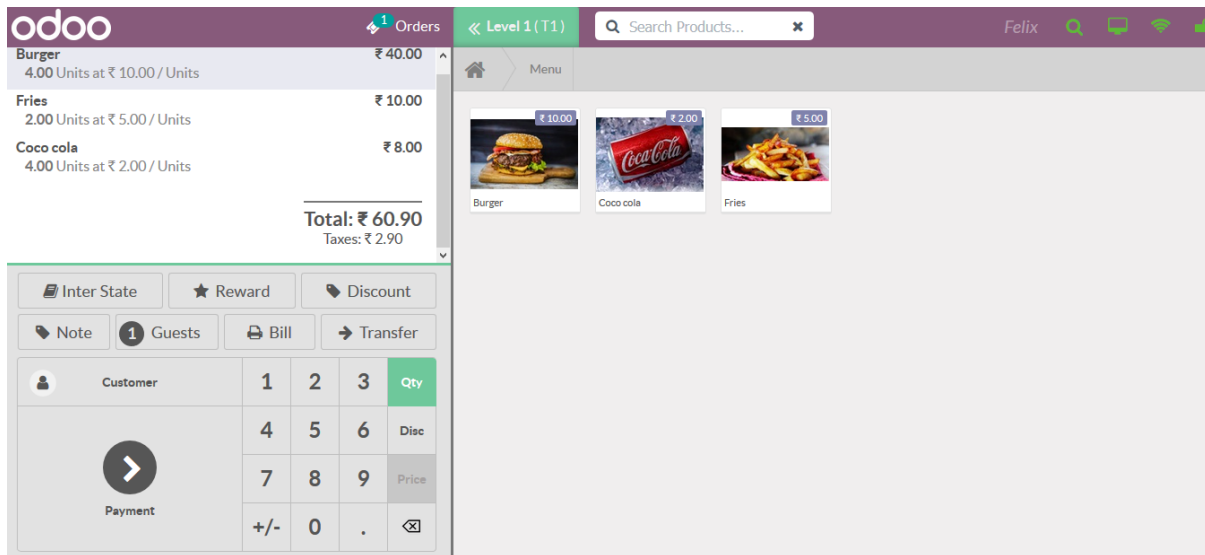
SAVE & NEW

DISCARD

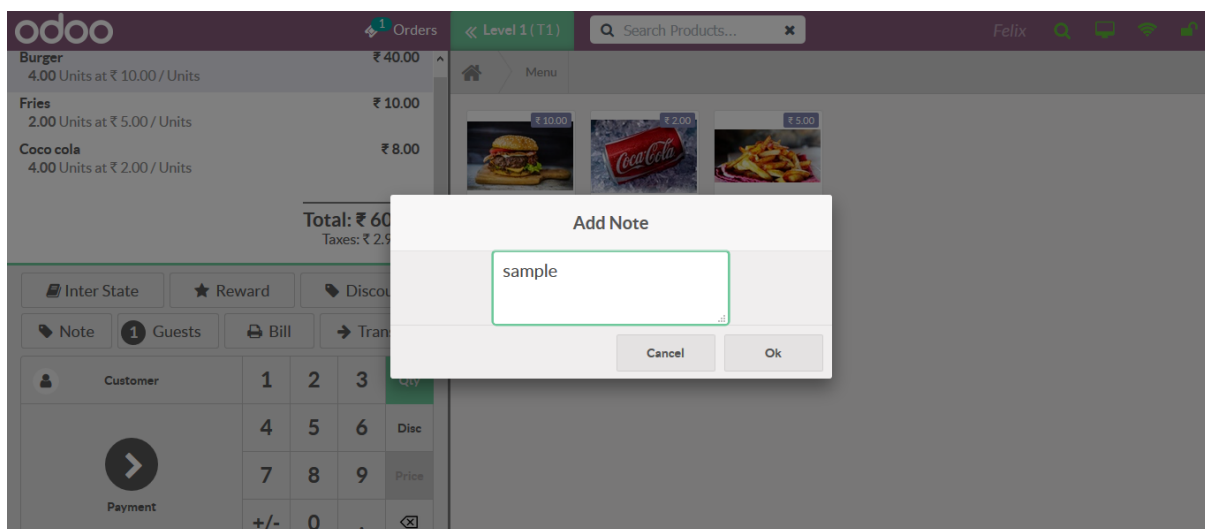
Now back in the PoS session the user can view the table allocations being made based on the floor described. The user can select the edit option available and add new tables, change name, allocate number of seats, change the shape of the table, create a colour coordination as per the user prospects and delete any if not required.



The order of the respective table can be done by selecting the table and the user will be depicted with the window as shown in below. Here the user can select the products form the list available, the user can also navigate to the home product window where all the products are being described can be viewed assigned to the point of sales operation. In need of multiple quantities of the product the user can enter in the virtual keyboard available.

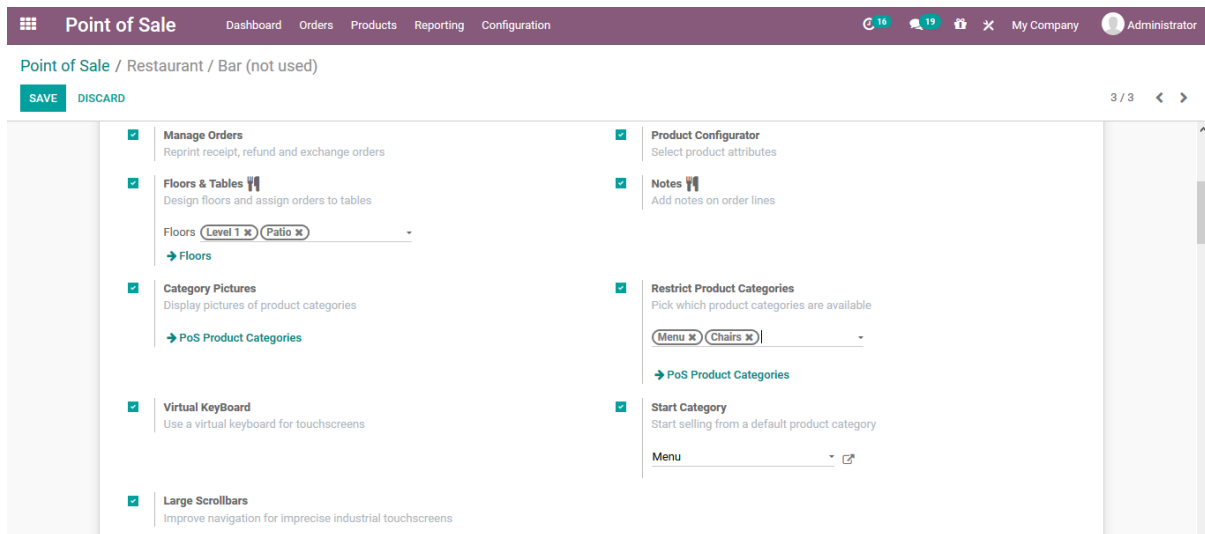


Add notes to the respective order by selecting the add note option available. This will be depicted to the cook, server or the accountant on the specific needs and the notes from the customer.

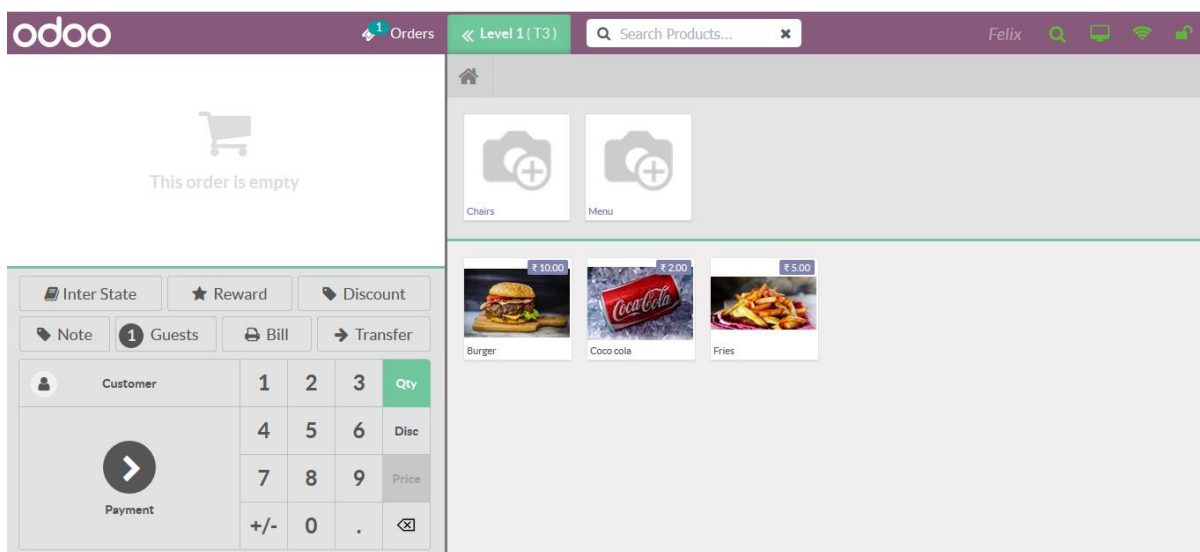


## Product category

The user can assign the product categories in the system of operation by enabling the product category in the product menu and the pictures will be visible in the point of sale menu by selecting the category pictures available. The restricted as well as the start product category can be assigned.



The assigned product categories will be visible in the Point of sale menu when the user is there to place an order.



## Connected devices

As the Odoo platform allows the users to have external third party device integration the user can assign them to the Point of sales module. In the point of sale description window the user can assign the IoT devices such as printers, customer display, barcode scanner and electronic sale using the Odoo IoT box. The IoT devices can be configured by selecting the IoT devices menu accessible through the settings window. The customer window and the direct devices can be enabled and configured as per the user needs. Under the barcodes menu the user can assign the barcode nomenclature for the operation in the platform. The order printers can be enabled and

the user can assign the printers available, the printers can be configured by selecting the printer menu accessible from the settings window.

The screenshot shows the 'Connected Devices' configuration page. The top navigation bar includes 'Point of Sale', 'Dashboard', 'Orders', 'Products', 'Reporting', and 'Configuration'. The breadcrumb trail is 'Point of Sale / Restaurant / Bar (not used)'. The page has 'SAVE' and 'DISCARD' buttons. The main content area is divided into two columns. The left column contains:
 

- IoT Box**: Connect devices using an IoT Box. It lists 'Receipt Printer', 'Customer Display', 'Barcode Scanners/Card Readers', and 'Electronic Scale' with dropdown menus.
- Customer Display**: Show checkout to customers through a second display.
- Order Printer**: Print orders at the kitchen, at the bar, etc. It has a 'Printers' dropdown menu with 'Sample' selected.

 The right column contains:
 

- Direct Devices**: Connect devices to your PoS directly without an IoT Box. It has fields for 'Epson Receipt', 'Printer IP', and 'Address'.
- Barcodes**: Use barcodes to scan products, customer cards, etc. It has a 'Barcode' field and a 'Default Nomenclature' dropdown menu.

In the printers menu the user can provide a name, assign the printer type, allocate the IoT devices and add the printer product categories.

The screenshot shows the 'Order Printers' configuration page. The top navigation bar is the same as the previous screenshot. The breadcrumb trail is 'Point of Sale / Restaurant / Bar (not used) / Order Printers / Sample'. The page has 'SAVE' and 'DISCARD' buttons. The main content area is a form with the following fields:
 

- Printer Name**: A text field with 'Sample' entered.
- Printer Type**: Two radio buttons: 'Use a printer connected to the IoT Box' (selected) and 'Use an Epson printer'.
- IoT Device**: A dropdown menu.
- Printed Product Categories**: A section with a 'PoS Product Category' label and an 'Add a line' button.

## Configuring Taxes

The taxes for the products can be configured under the taxes menu to be operating at the point of sales of the platform. The fiscal position per order can be enabled and assigned, along with the total fiscal positions for the entire PoS operation.





**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration

Point of Sale / Restaurant / Bar (not used)

**SAVE** **DISCARD** 3 / 3

### Pricing

**Default Pricelist**  
Public Pricelist (INR)

[→ Pricelists](#)

**Product Prices**  
Product prices on receipts

☒ Tax-Excluded Price  
☐ Tax-Included Price

☒ **Manual Discounts**  
Allow discounts per line

☒ **Price Control**  
Restrict price modification to managers

☒ **Advanced Pricelists**  
Set shop-specific prices, seasonal discounts, etc.

Available Pricelists: Public Pricelist (INR)

☒ **Global Discounts**  
Allow global discounts on orders

Discount Product: [DISC] Discount   
Discount %: 10.00

☒ **Loyalty Program**  
Give customer rewards, free samples, etc.

Loyalty Program Type a

The loyalty programmer's operation can be enabled and the user can describe the respective loyalty control by selecting the menu available and describing the loyalty point details. Back in the orders menu when the sale is to be conducted the loyalty points are displayed in the pricing section.

**odoo** | Orders | Level 1 (T3) | Search Products... | Felix

6.00 Units at ₹ 5.00 / Units

**Total: ₹ 126.00**  
Taxes: ₹ 6.00

Points +126  
126

Inter State | ★ Reward | Discount

Note | 1 Guests | Bill | Order

Transfer

nvsn | 1 2 3 Qty | 4 5 6 Disc | 7 8 9 Price | +/- 0 .

Payment

Burger ₹ 10.00 | Coco cola ₹ 2.00 | Fries ₹ 5.00

## Payments

The payment methods can be configured for the PoS operation under the payments menu of the respective PoS descriptions tab. The payment methods menu can be described in the payment method menu accessible from the same page.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 | 19 | My Company | Administrator

Point of Sale / Restaurant / Bar (not used)

**SAVE** **DISCARD** 3 / 3

☒ **Price Control**  
Restrict price modification to managers

**Payments**

**Payment Methods**  
Payment methods available

Cash ☒ Bank ☒

[Payment Methods](#)

☒ **Tips**  
Accept customer tips or convert their change to a tip

Tip Product [TIPS] Tips

☐ Add tip after payment (North America specific)

**Bills & Receipts**

☒ **Header & Footer**  
Add a custom message to header and footer

☐ **Automatic Receipt Printing**  
Print receipts automatically once the receipt is validated

**Advanced Cash Control**  
Control cash box at opening and closing  
Authorized Difference 100.00

In the payment methods the user can view all the described payment methods and can create and assign new one using the creation window available.

**Point of Sale** | Dashboard | Orders | Products | Reporting | Configuration | 16 | 19 | My Company | Administrator

Point of Sale / Restaurant / Bar (not used) / Payments Methods

**CREATE** [Filters](#) [Group By](#) [Favorites](#) 1-2 / 2

<input type="checkbox"/> Payment Method	Intermediary Account	Cash	Use a Payment Terminal	Company
<input type="checkbox"/> Cash	100410 Debtors (PoS)	<input checked="" type="checkbox"/>		My Company
<input type="checkbox"/> Bank	100410 Debtors (PoS)	<input type="checkbox"/>		My Company

Advanced cash control operation can be enabled and the authorized deference in the cash control can be described. As it is a restaurant or a bar operation the tips for the waiters and servers can be described by enabling the tips option available. The tips in Odoo are defined as products and the user can assign any tips products being defined in the platform to the respective operation. On selecting the external link of the tips assigned the user can view the product description and the user can assign the price on each tip being assigned.

Open: Tip Product ✕

Go to Website
0.00 Units Sold
Product Moves
0 Bill of Mat...
Putaway Rules
0 Quality Poi...
0.00 Units Purchased

Product Name

Tips

☒ Can be Sold
☒ Can be Purchased
☐ Can be Expensed

General Information

Sales

Point of Sale

eCommerce

Purchase

Inventory

Accounting

Product Type

Consumable

Public Price

₹10.00

Extra Prices

Internal Reference

TIPS

Customer Taxes

Barcode

Cost

₹0.00

Product Category

All / Saleable / PoS

Company

HSN/SAC Code

Unit of Measure

Units

HSN/SAC Description

Purchase Unit of Measure

Units

SAVE

DISCARD

## Bills and receipt

The platform allows the user to assign and configure the bills and receipts and its operations for the user to generate then ducting the PoS sessions. The header and footer can be enabled and can be described which will be visible in the bills generated. Bill printing, bill splitting, invoicing and automatic receipt printing can be enabled and configured.

Point of Sale
Dashboard
Orders
Products
Reporting
Configuration
16
19
My Company
Administrator

Point of Sale / Restaurant / Bar (Administrator)

EDIT
CREATE
Action
3 / 3

☒ **Tips**  
Accept customer tips or convert their change to a tip  
Tip Product [TIPS] Tips  
☐ Add tip after payment (North America specific)

☒ **Header & Footer**  
Add a custom message to header and footer  
Header ABCD  
Footer EFGH

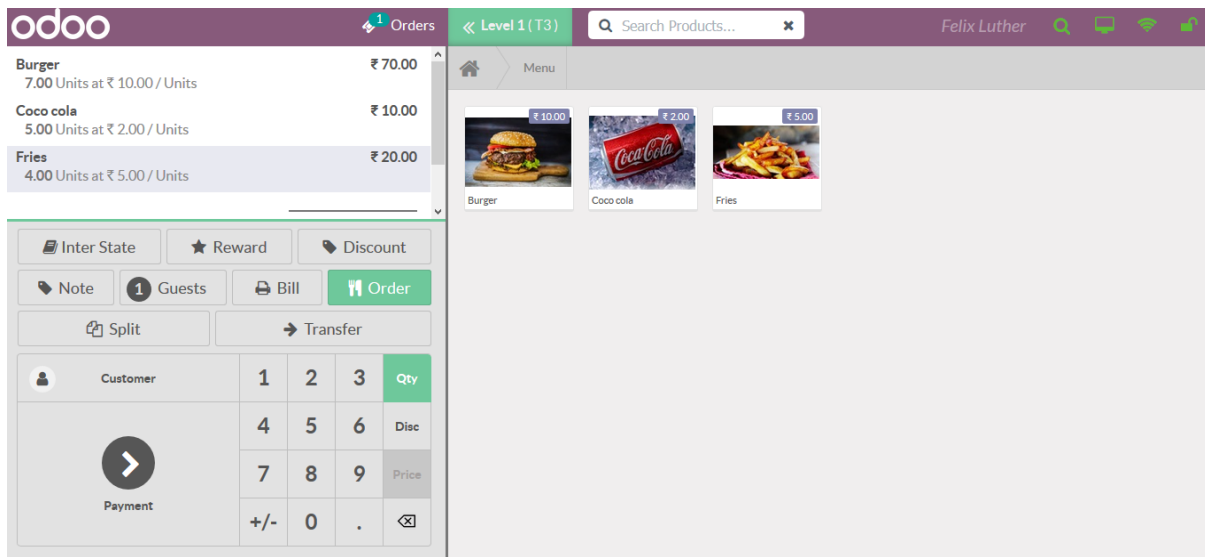
☒ **Bill Printing**  
Allow to print bill before payment

☒ **Invoicing**  
Print invoices on customer request  
Invoice Journal Tax Invoices

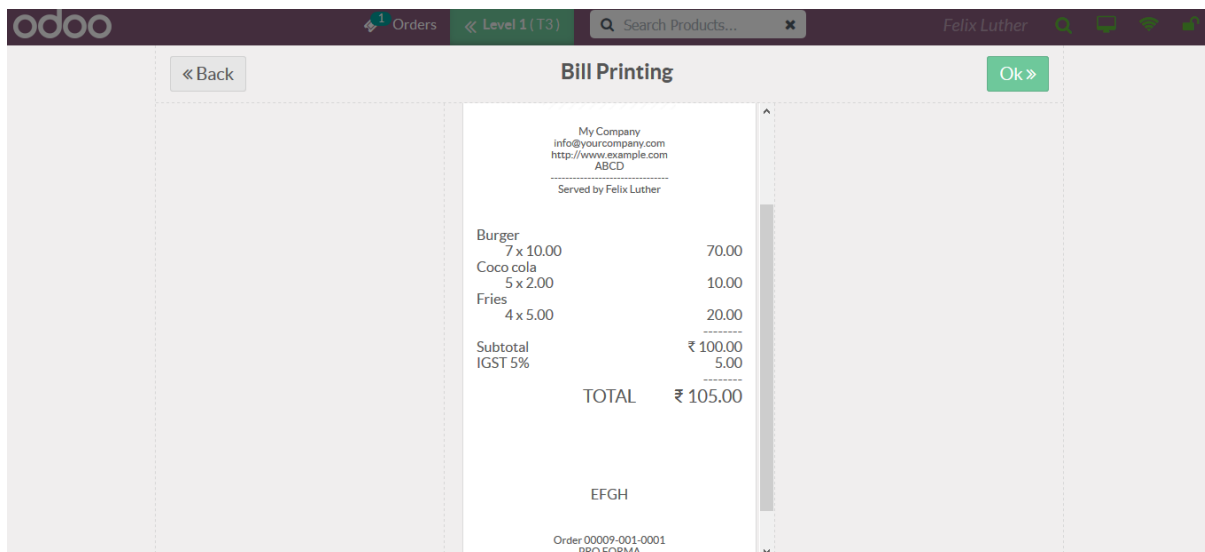
☒ **Automatic Receipt Printing**  
Print receipts automatically once the payment is registered  
☒ Skip Preview Screen

☒ **Bill Splitting**  
Split total or order lines

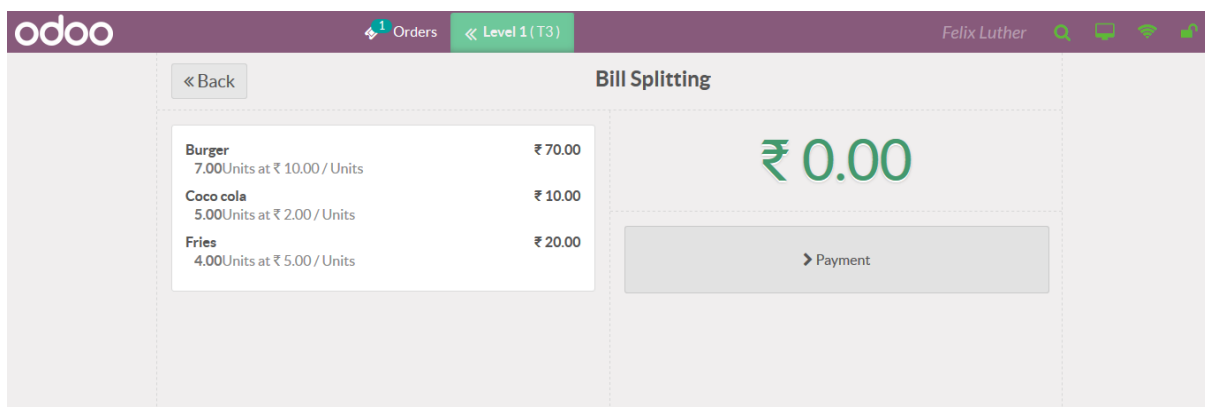
Back in the PoS orders window the user can select the bills option to view the invoices being generated.



As described in the billing aspect of the settings the header and the footers are being described.

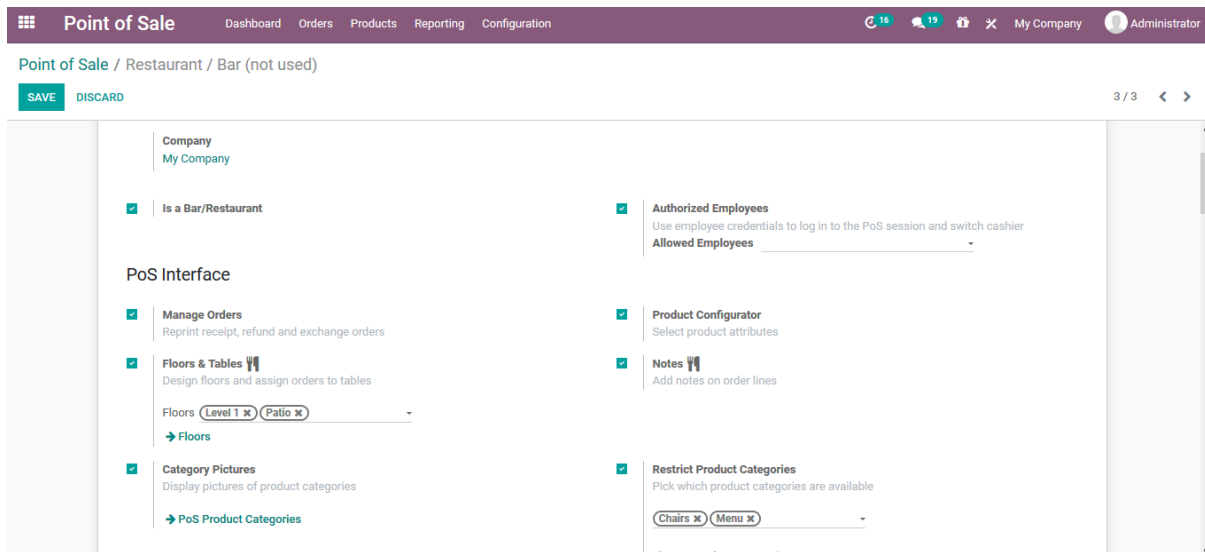


On selecting to split the bill form the borders menu all the customers associated will be described and the user can assign the bill split or the customers as per their need.

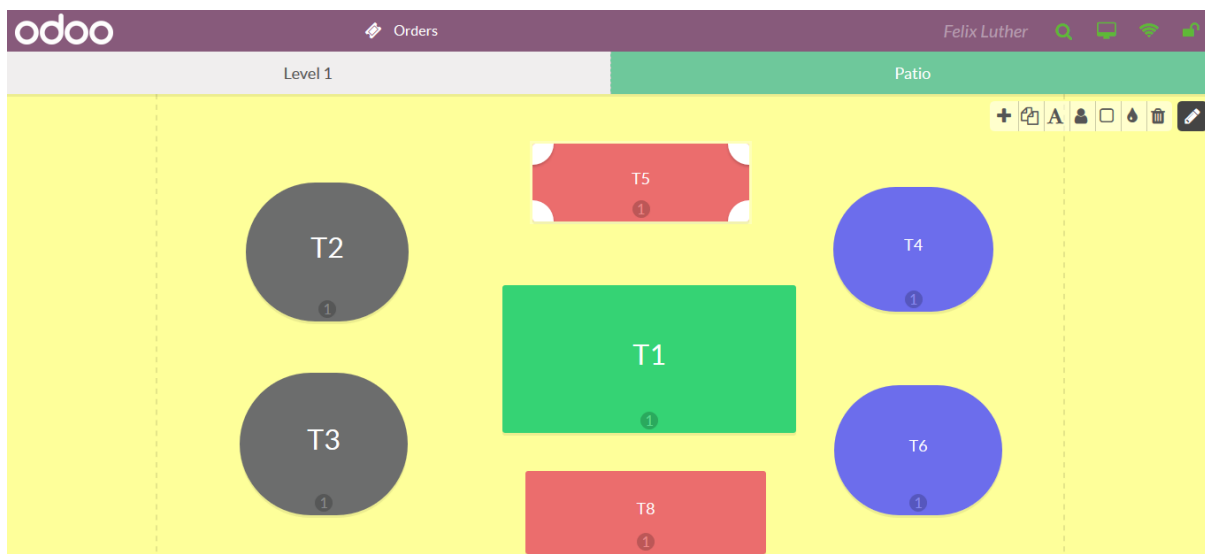


## Table management

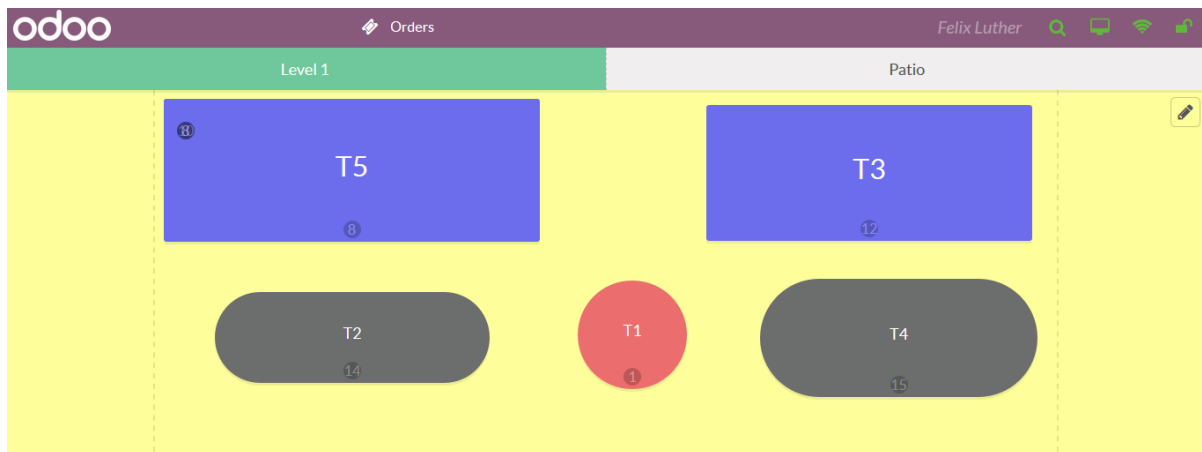
In case of a restaurant or a bar operation the user will be in need to map the tables and its operations. The Odoo platform's PoS module enabled the user to manage the floors and tables of the operation using the efficient table management aspects of the PoS module of the Odoo platform. The user can enable the floors and tables option available in the respective PoS interface menu.



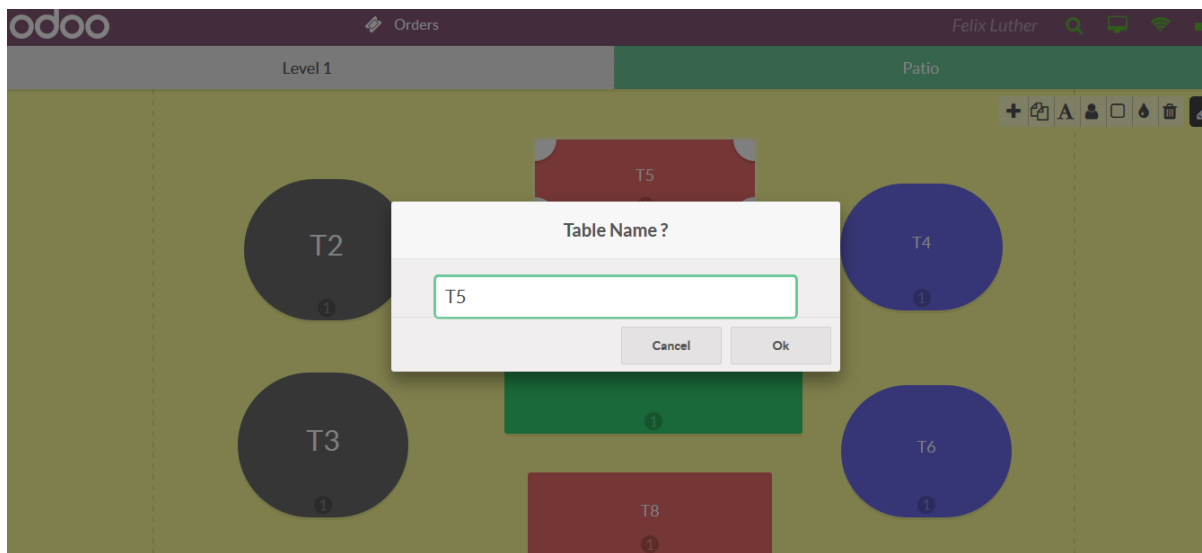
Now the user logs in to the PoS session to start and he/she can view the floors being described with the tables allocated. On the respective floor the user can select the edit option available where by selecting the + symbol the user can add a table and scroll and direct the respective table to the precise location and size in the floor.



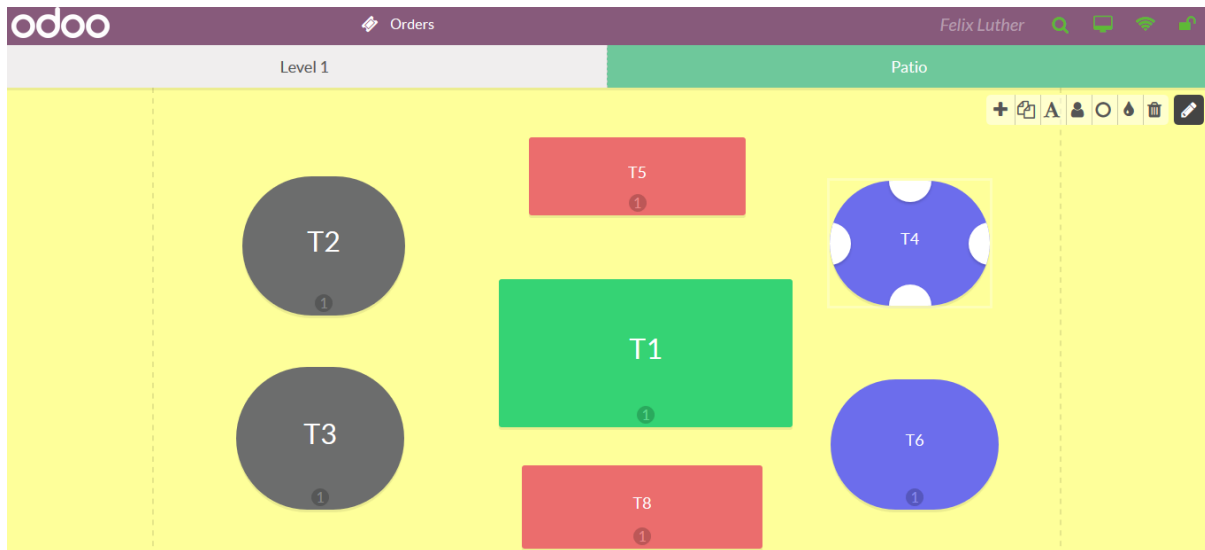
The user can navigate to the other floor by selecting the menu option available.



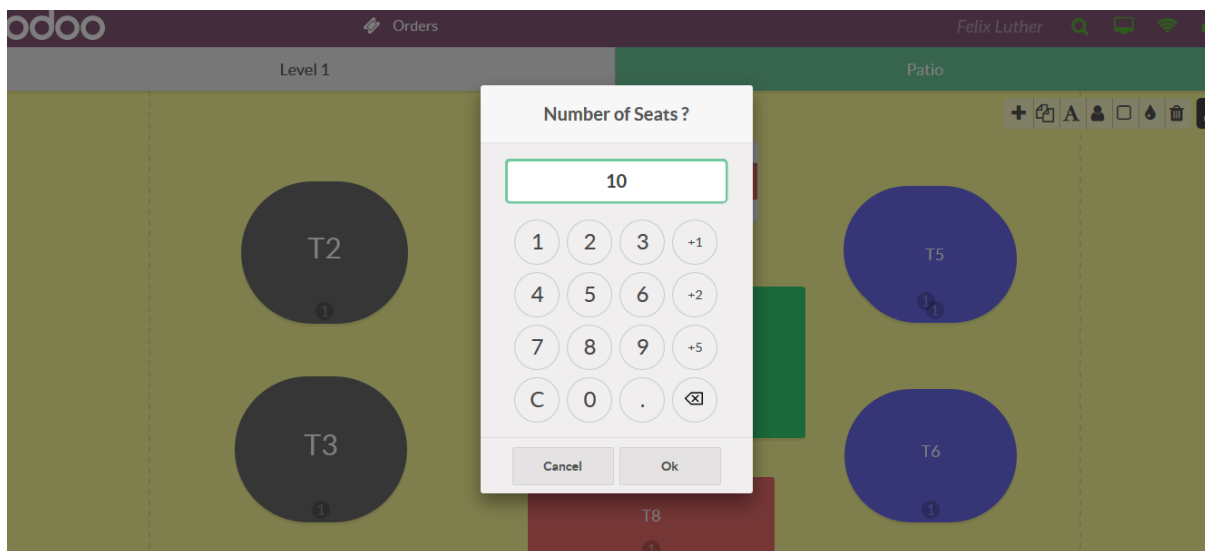
To add a name to the table the user can select the word pad option available and select the respective table where the user will be depicted with the following menu where the user can provide a customized name.



The table formation can be changed from round to square or vice versa by selecting the round or square option available in the edit menu.



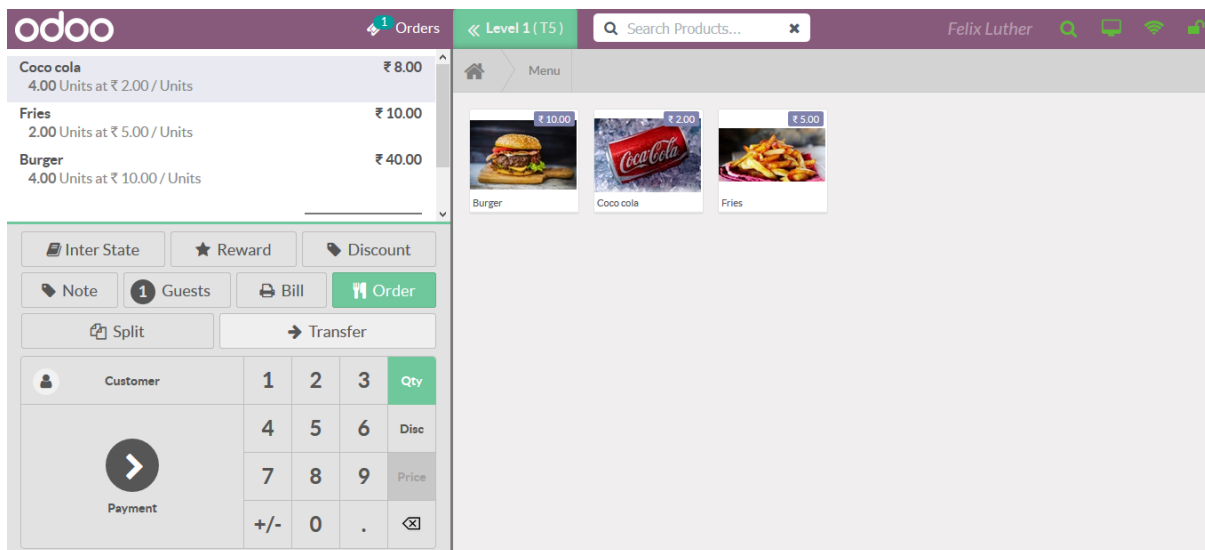
The number of seats to the table can be added by selecting the option and choosing the respective table.



### Register table orders

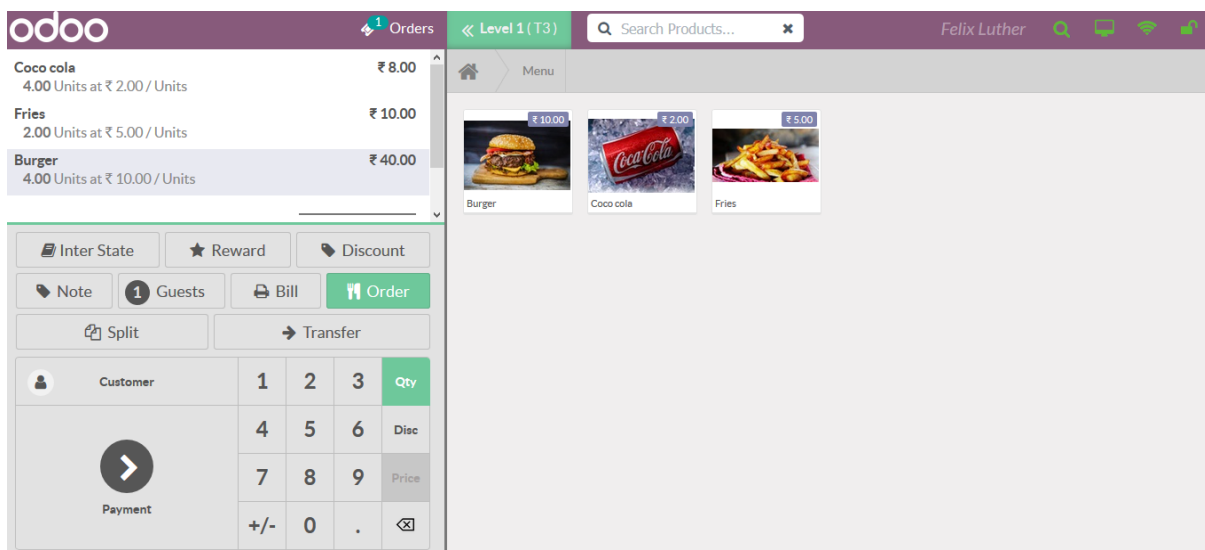
The user can place an order with respect to the table by selecting the respective one and the user will be directed to the orders menu where the orders can be placed.





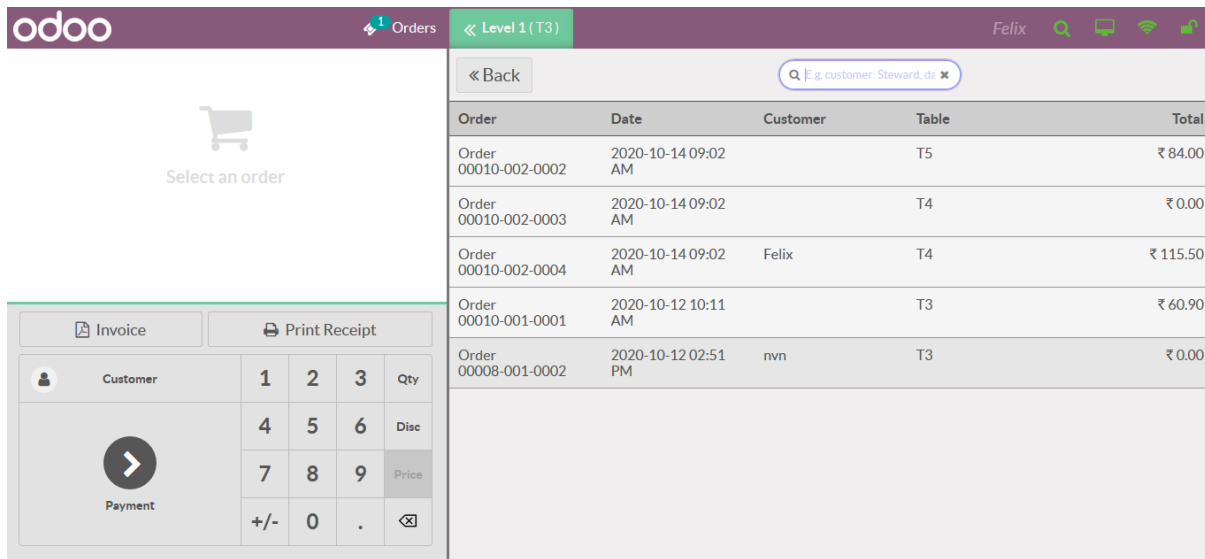
## Order Transfer

There may be instances where the user needs to transfer the order or the table, the Odoo platform allows the user to do so by selecting the transfer option available



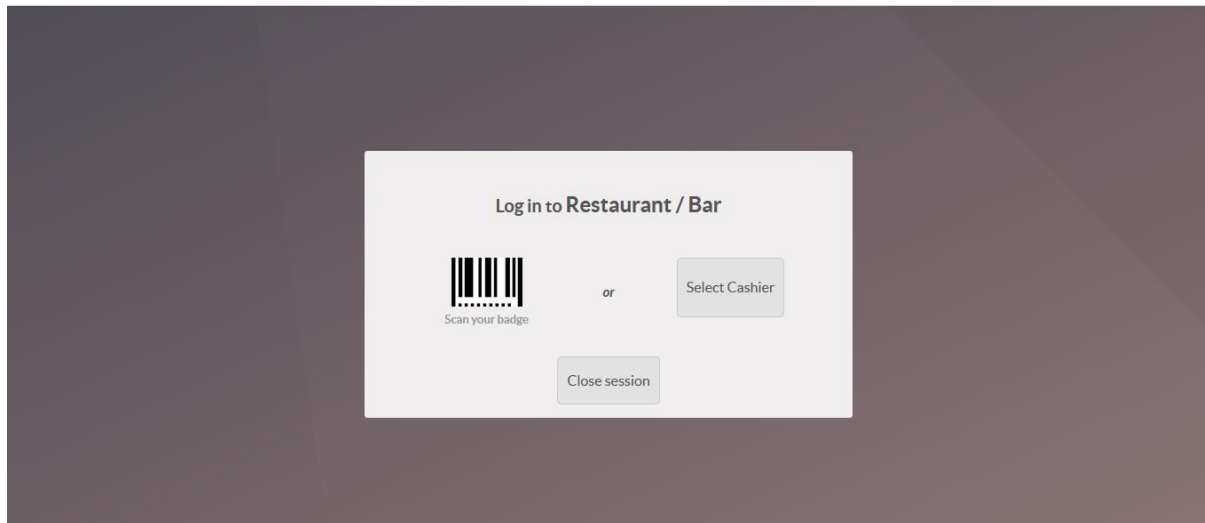
## Order management

The PoS module allows the user to have a look at all the ongoing and finished orders allowing them to edit and manage the orders at unforeseen circumstances or customers request. The user can access the order management window by selecting the search icon available in the dashboard next to the user login information available. The user can select the respective order from the list and edit the details as per the need.



## User login and logout

The platform allows the PoS module to be operated using multiple employees therefore, is the use of employee login and log out functionality. When the PoS session is to be started the user will be depicted with the following window. Here the user can either scan in the employee ID containing the barcode information or select the respective cashier option. Here the user will be depicted with the list of cashiers allocated and they can select the one and will be depicted with a login ID requirement window as present in the employee description of the platform.



In addition to this the user can ask the employees to provide the details of the balance amount available in cash or bank account after each employee session or shift.

## Reporting

Reporting is one of the key aspects of the Odoo platform therefore it's available even in the Point of sales module too. The reporting aspects of the Point of sale module will provide the user with the analytical and quantitative reports of the sales aspects of the company done in retails operations. The reports can be generated using the various default as well as customizable string and grouping specs available. In addition, the user can view the reports in graphical as well as pivot view. Where the pivot view will provide the user with much more quantitative analysis.

