Pragmatic Techsoft Pvt. Ltd.

Odoo – POS
User Guide

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Retail Management

Apart for regular modules eg sales, purchase, Warehouse and accounting , Retail industry has some peculiar business activities as follows:

1) Loyalty Management – Redeemable points management

2) Gift voucher issue / redemption

3) Product promotional schemes

Above tools are used to retain customer base.

Retails Management module includes above mentioned activities

1. Introduction to Loyalty Management Module

In marketing generally and in retailing more specifically, a loyalty card, rewards card, points card, advantage card, or club card is a plastic or paper card, visually similar to a credit card or debit card, that identifies the card holder as a member in a loyalty program..

Such Loyalty cards are also known as Reward Cards or Points Card. Such cards are used to provide Redeemable points earned against the purchases. Earned points can be redeemed against the future purchase for equivalent amount.

This document will elaborate the functionality of Redeemable Points management system in retail industry. It covers following process :

- Registered Customer Registration
- Redeemable Points Allocation Management
- Points Redemption Scheme
- Keeping Track of points earned, redeemed and balance point

We will see the functionality of the *Points Management Module* in details as follows :

2. Points Scheme Management Configuration

There are 2 main parts to define *Redeemable Points Management Schemes* as follows.

Points Scheme Management : This will allow user to create user defined points scheme for customers. These schemes can be defined for specific date range and that too on total bill amount or on each product category. This part basically handles allocation of no. of points on specified bill amount or quantity of each product.

Points Redemption Scheme : This will facilitate the customer to redeem earned points during their next purchases. User can define parameter for currency discount equivalent to no. of points redeemed.

There are some of the standard modules of OpenERP like Sales, Warehouse, Accounting, POS & Setting are also incorporated. Each module takes care of Sales Management, Inventory Control , Accounts, POS Orders and User Access Definition respectively.
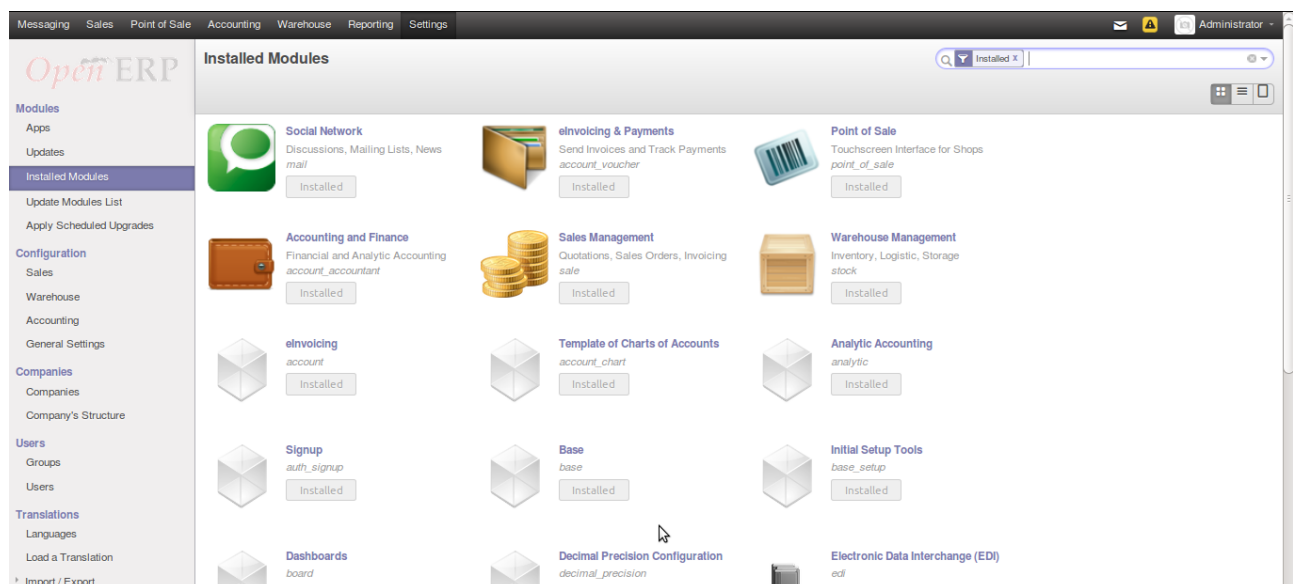
There are some basic configuration forms we need to understand first as follows :

2.1 Points Scheme Release

Path : Point Of Sale $\longrightarrow$ Configuration $\longrightarrow$ Loyalty Management $\longrightarrow$ Points Scheme Release
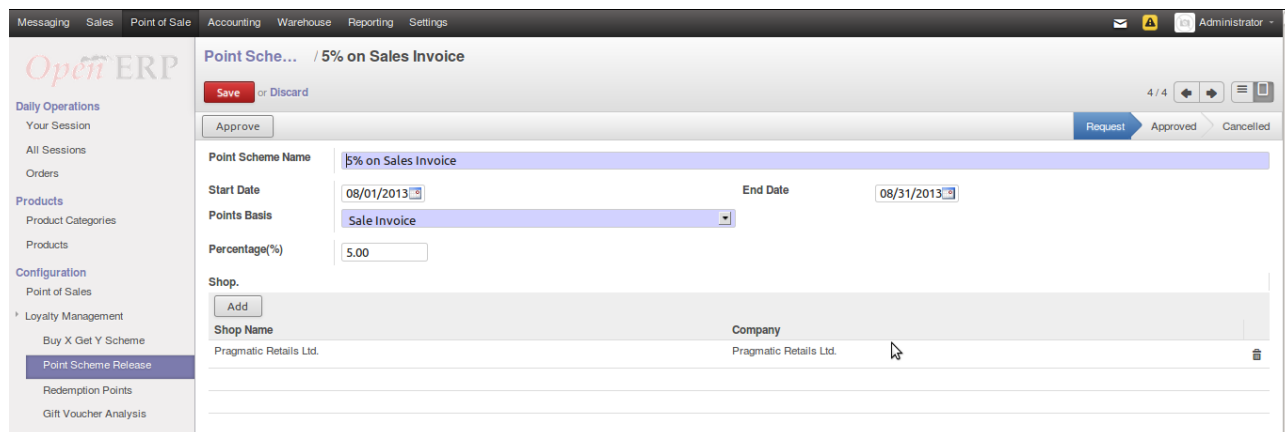
Points Scheme Release allows user to defined different points earning scheme between different date span. Points scheme can be made applicable in two was as follows

     A) On Sales Invoice

     B) Points/ Product/ Product Category
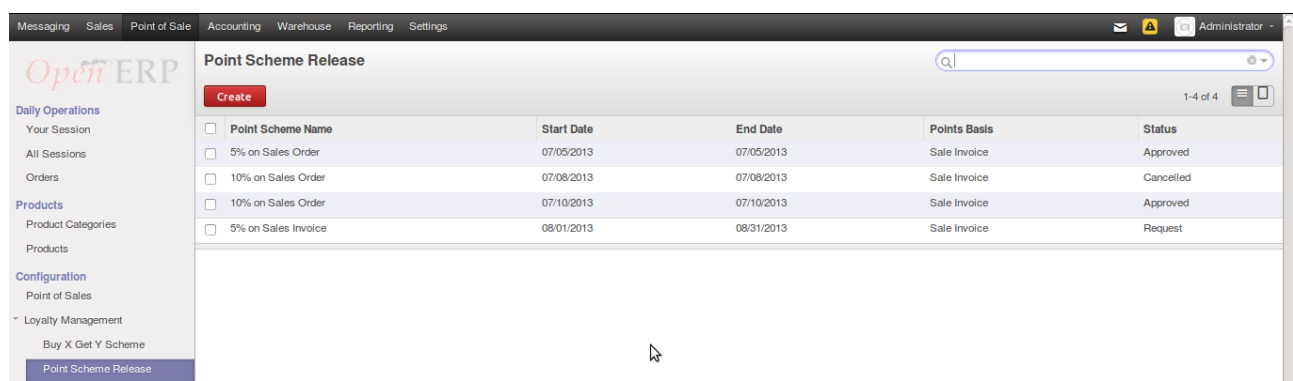
Click on one of the record to see the details captured in this configuration form :

Points Scheme Name : This is a user character field to define Points Scheme Name.
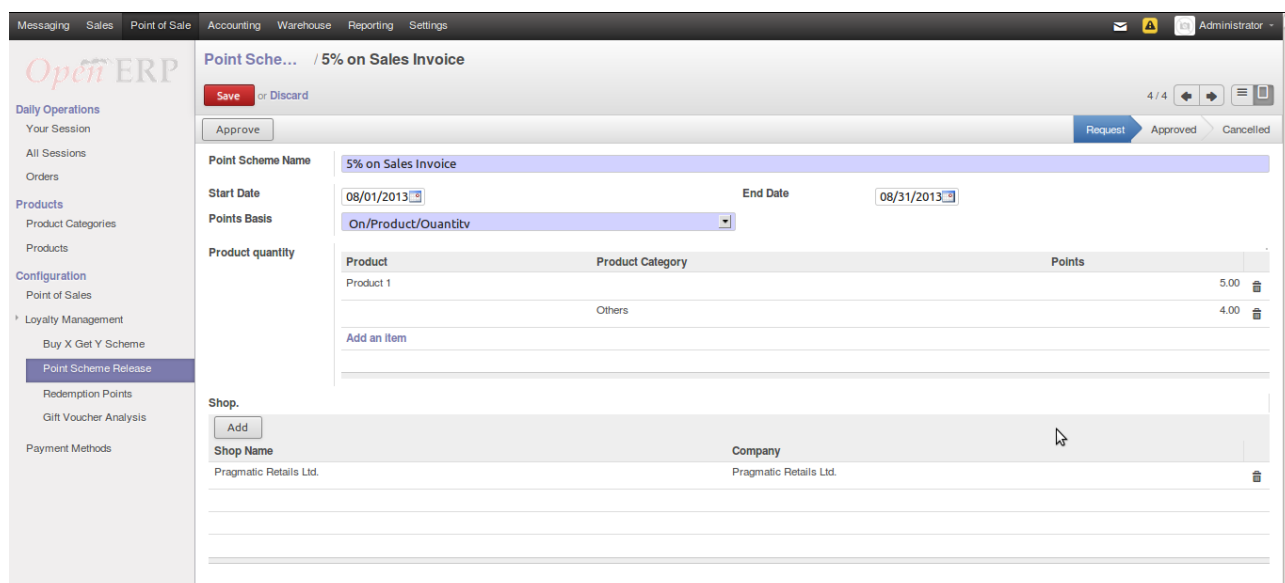
Start Date : This is a date field from which given Points scheme shall be made applicable

End Date : It is a date field to indicate the end of Points scheme computation. In other words points scheme shall be active for date range only. Similarly two points schemes can not be created in overlapping date range.

Points Basis : It is a Many 2 One field with two options to define basis of Points computation.

        A) On Sales Invoice : With this option system will compute redeemable points based on Sales Invoice amount. It will be computed based on certain percentage provided by the end user.

        B) on/Product/Quantity : With this option system will compute redeemable points based on per quantity purchase of specific products or product category.
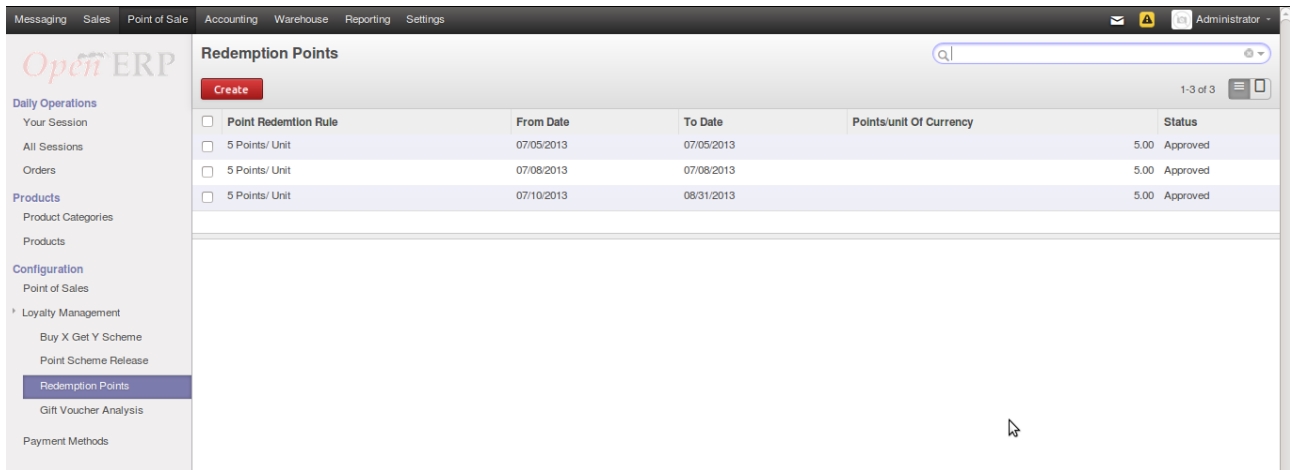
User can define per product/ Product Category wise points earnings.

Shop: This scheme shall be made applicable in specific Shop(s)or Branch(s).
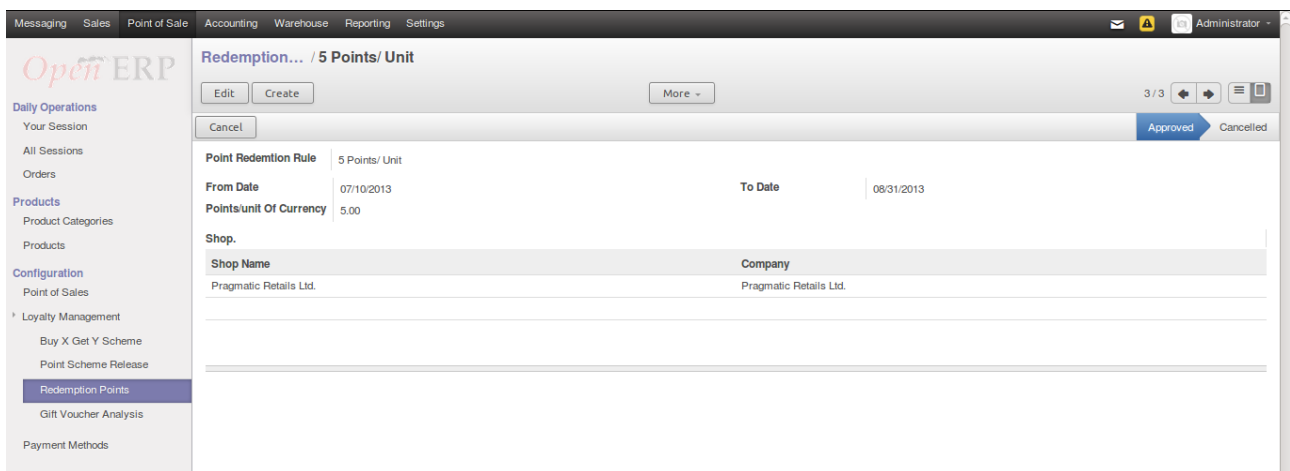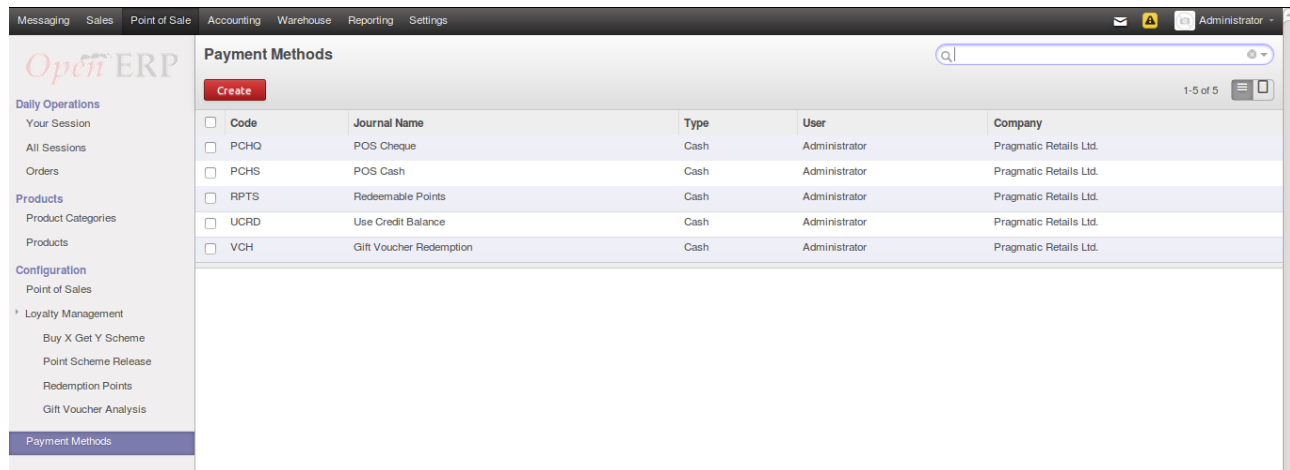
2.2 Points Redemption

Path : Point of Sales ⟶ Configurations ⟶ Loyalty Management ⟶ Points Redemption

This will facilitate to define points redemption rule. User can define no. of points equivalent to one unit of currency. System will compute amount to be discounted form the bill amount based on no. of points redeemed.

Click on one of the record in order to view details captured in this form:

Points Redemption Rule : This is a user character field to define Points Redemption Scheme Name.

Start Date : This is a date field from which given redemption scheme shall be made applicable

End Date : It is a date field to indicate the end of Redemption scheme computation. In other words Redemption scheme shall be active for date range only. Similarly two points schemes can not be created in overlapping date range.

Points/ Unit of Currency : This is an integer field to define no. of points equivalent to one unit of currency.

Shop: This scheme shall be made applicable in specific Shop(s)or Branch(s).

2.3 Payment Methods

Path : Point Of Sales ——▶ Configurations ——▶ Payment Methods

User can maintain a list of different payment mode accepted on different billing counters. And can be seen as follows

Lets go to "Redeemable Points" method to see the changes.

There are some boolean fields added on this panel as follows:

For Points : When click on such payment methods, system will generate generate additional field on payment screen to capture no. of points to be redeemed, this will compute discount amount to be reduced form total bill amount against points. Accounts posting will be done in accounts linked with such Payment methods.

For Gift Coupons : When click on such payment methods , system will generate generate additional field on payment screen to capture Gift Coupon codes to be redeemed. This will compute discount amount to be reduced form total bill amount against Redeemed Gift Coupon. Accounts posting will be done in accounts linked with such Payment methods.

Use Credit Balance : When click on such payment methods , system will generate generate additional field on payment screen to capture Credit balance of customer to be used in this current bill amount. This will be reduce form total bill amount.

Just link different payment methods to each POS terminal through "Point of Sales" menu in Configuration.

3. POS Transactions

Path : Point Of Sales → Daily Operations → Your Session
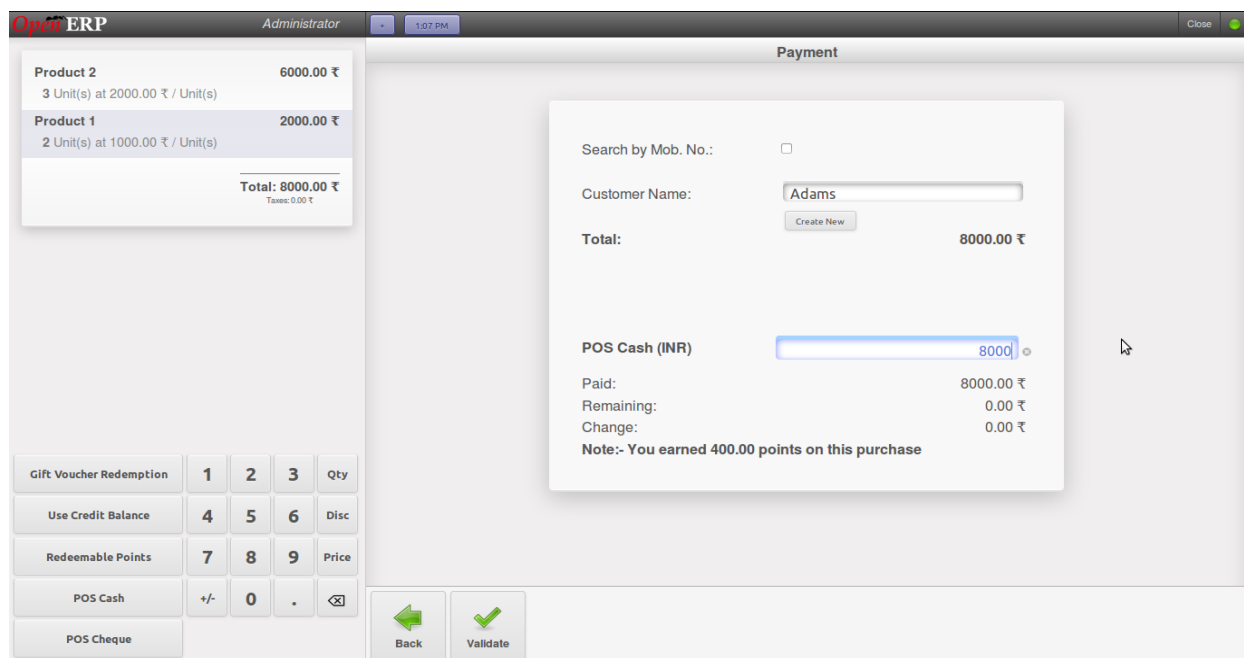
With this for user can sellout products using POS screen. Each user will have dedicated POS terminal. User will have to create new session to sale products.

3.1 Points Earning

Click on "POS Cash" payment method in order to receive payment.
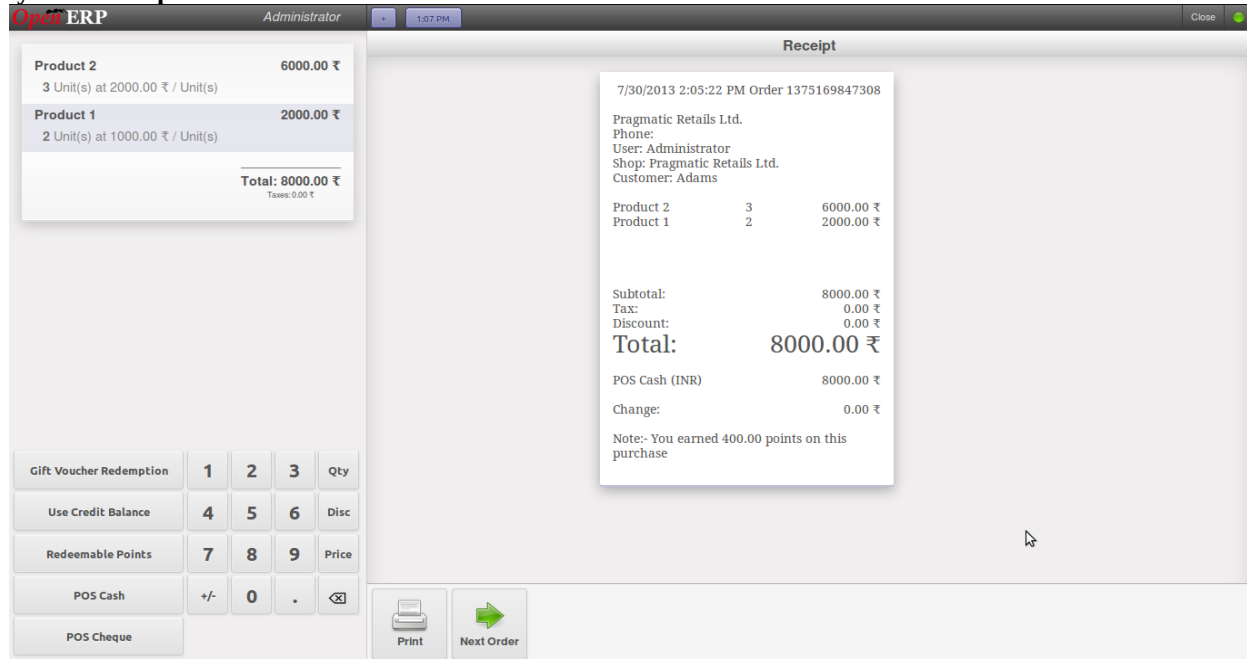
Based on the configuration made for Points release system will show message at the bottom of payment screen and

same is printed on payment receipt and the points will be accounted against selected customer name. Points earned shall be computed based on Points Scheme Release.

If customer name is not provided then such points shall not be taken in to account.
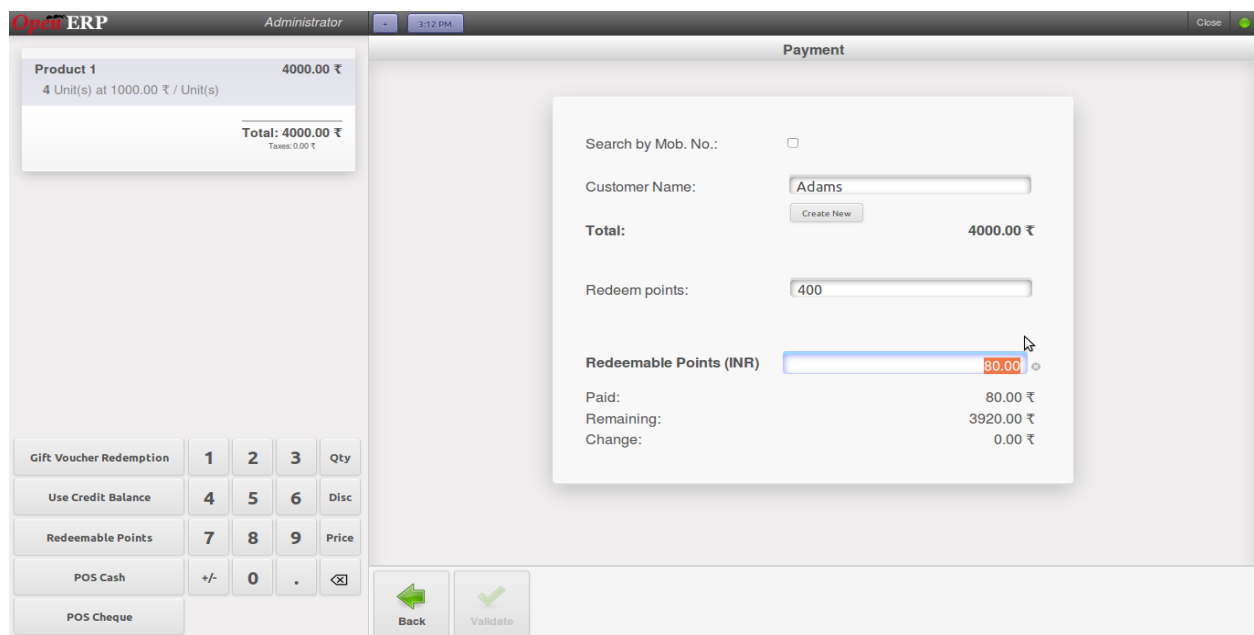
Payment Receipt :

3.2 Points Redemption

Now 400 points have been linked with "Adams". Adams can redeemed such points from in future purchases.

Let's create one more POS order where we will redeem some of the points in new purchases. and click on "Redeemable Points" payment method. Following screen will appear on the screen.
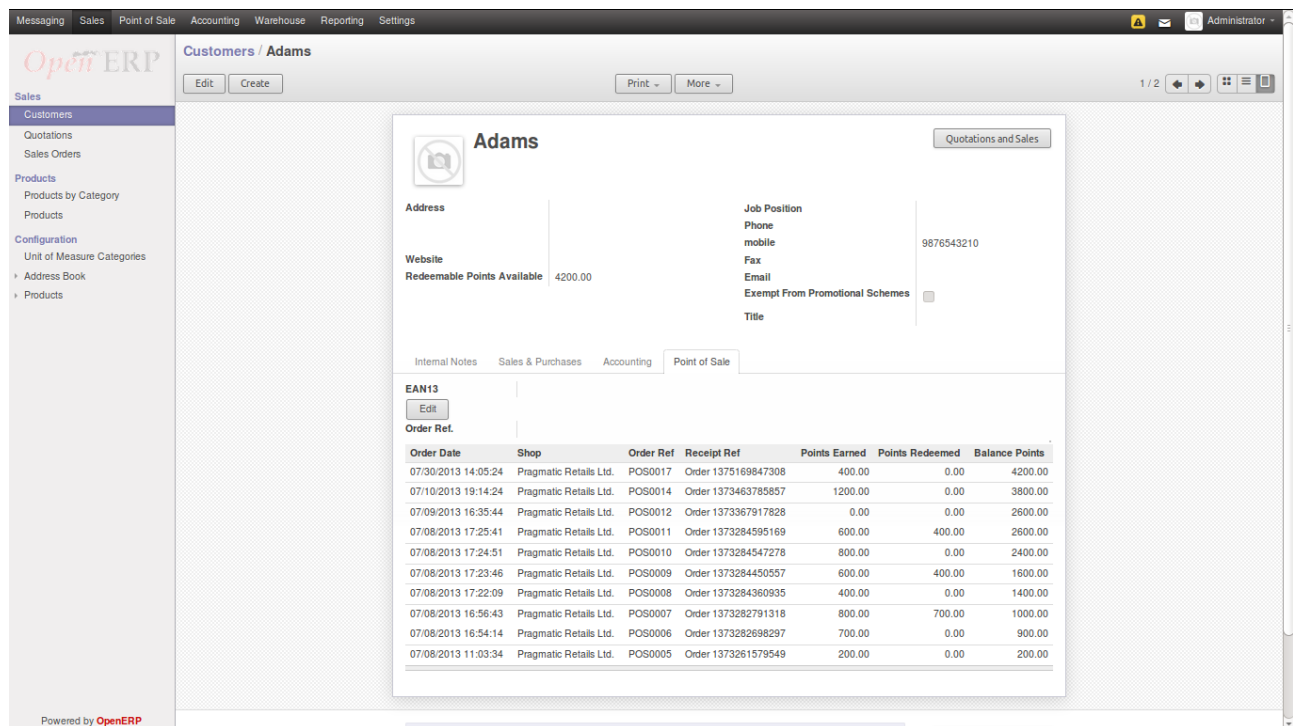
User will have to provide points to be redeemed for this transaction. And system system will compute equivalent amount.

Rest amount can be paid in any other payment method as "Cash", "Cheque" etc.

3.3 Customer wise Points Tracking

Path :   Sales → Customers

System maintains track of customer wise transaction in order to calculate Closing balance of redeemable points. User can view transaction wise log in Customer Partner as follows:

4. Introduction to Gift Coupon Management Module

In Retail industry now a days we do have trend that people do prefer to procure "Gift Coupons" from shop that actually giving Hard Cash as a gift on various occasion. Using Gift Coupons appears more handy in terms of transaction without hassle.

Retail shop may have preprinted gift coupons as well as runtime generated gift coupons, with different currency denominations.

Following are the steps involved in Gift Coupon Management system

- Gift Coupon Issue
- Gift Coupon Redemption

We will see the functionality of the *Gift Coupon Management Module* in details as follows :

5. Gift Coupon Management Configuration

There are 2 main parts to define *Gift Coupon Management* as follows.
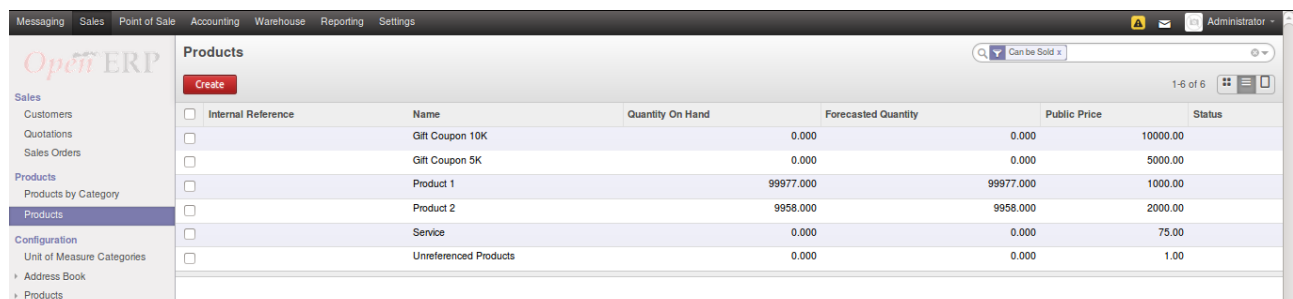
Gift Coupon Issue : This will allow user to to sell multiple Gift Coupons with unique barcode to each Gift Coupon.

Gift Coupon Redemption : This will facilitate customer to redeem their purchased Gift Coupons .

5.1 Gift Coupon Definition
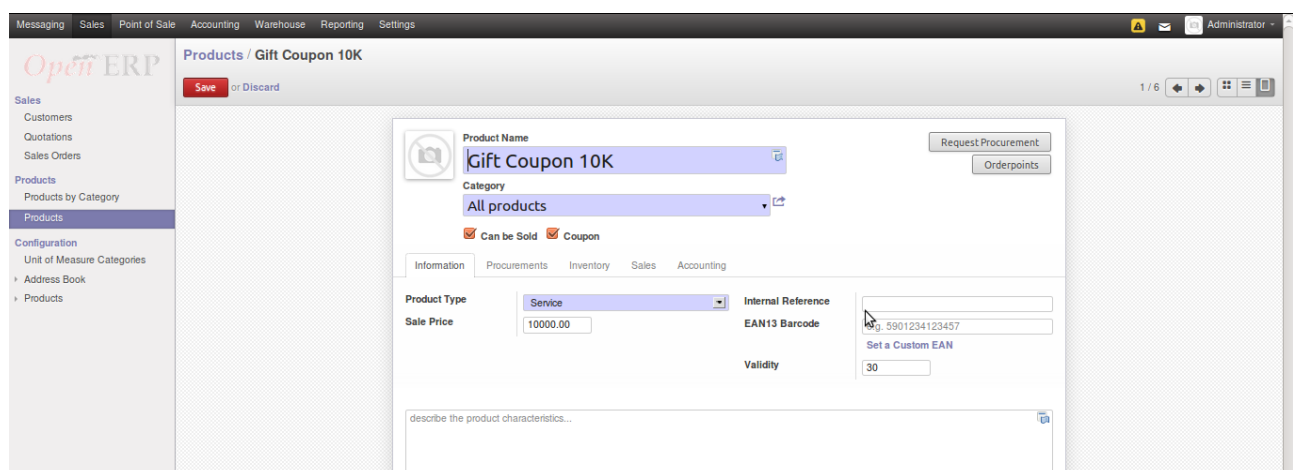
Path : Point Of Sale ⟶ Products ⟶ Products

In this system Gift Coupons are treated as service products. User can defined Sales Price for such gift coupon. We have created couple of Gift Coupons "Gift Coupon 10K" & "Gift Coupon 5K"

Click on one of the record to see the details captured in this Product form :

In order to treat product as a Gift Coupon user will have to set boolean field as "Gift Coupon". This will set product
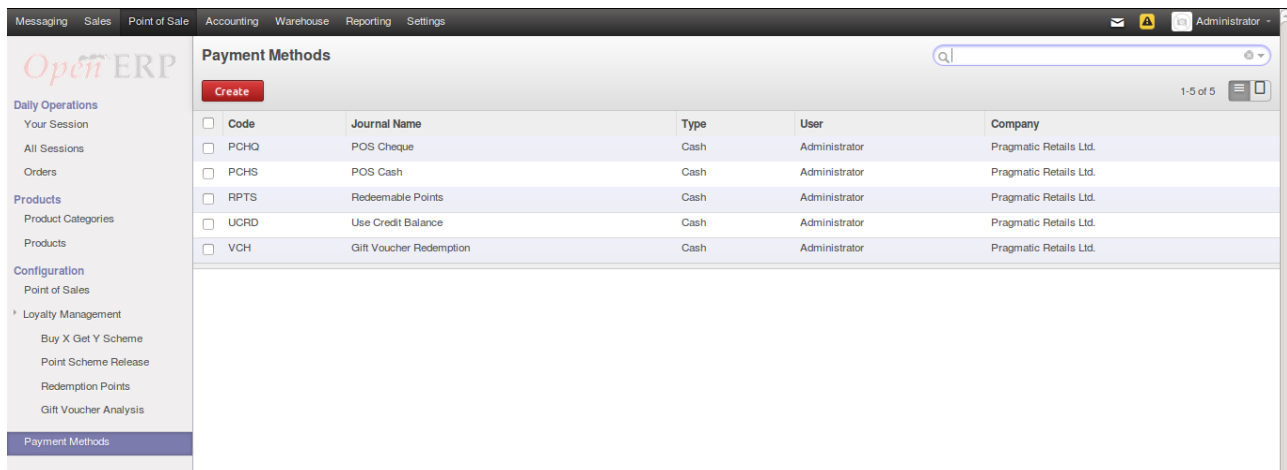
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type to "Service".

Validity : This is an integer field to indicate validity days from the date of sell of each gift voucher.

Rest fields in product master are remained as it is.

5.2 Payment Method Configurations

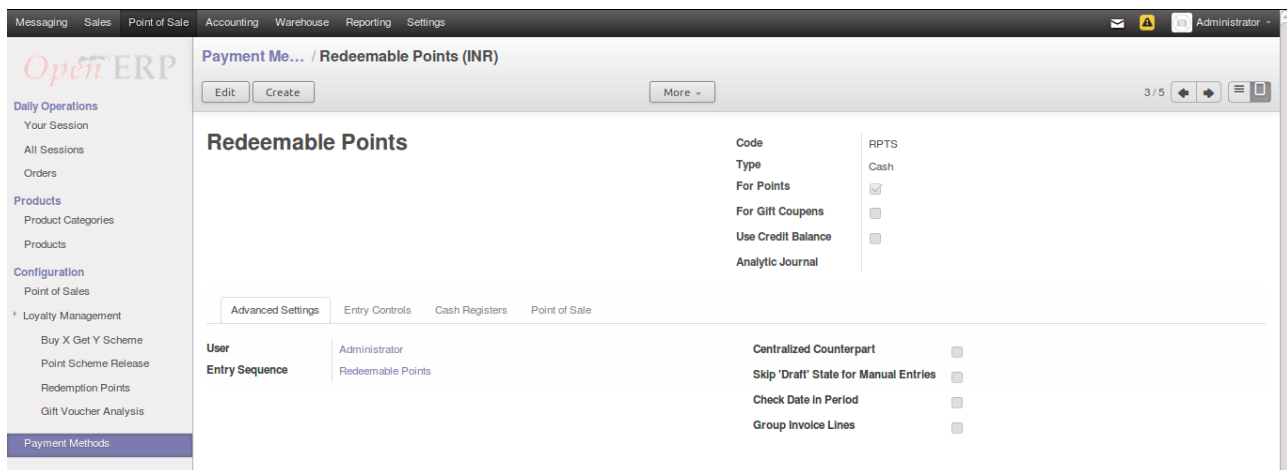**Path :** Point Of Sales ⟶ Configurations ⟶ Payment Methods

User can maintain a list of different payment mode accepted on different billing counters and can be seen as follows

Lets go to "Redeemable Points" method to see the changes

There are some boolean fields added on this panel as follows :

For Points : When click on such payment methods, system will generate generate additional field on payment screen to capture no. of points to be redeemed, this will compute discount amount to be reduced form total bill amount against points. Accounts posting will be done in accounts linked with such Payment methods.

For Gift Coupons : When click on such payment methods , system will generate generate additional field on payment screen to capture Gift Coupon codes to be redeemed. This will compute discount amount to be reduced form total bill amount against Redeemed Gift Coupon. Accounts posting will be done in accounts linked with such Payment methods.

Use Credit Balance : When click on such payment methods , system will generate generate additional field on payment screen to capture Credit balance of customer to be used in this current bill amount. This will be reduce form total bill amount.

Just link different payment methods to each POS terminal through "Point of Sales" menu in Configuration.
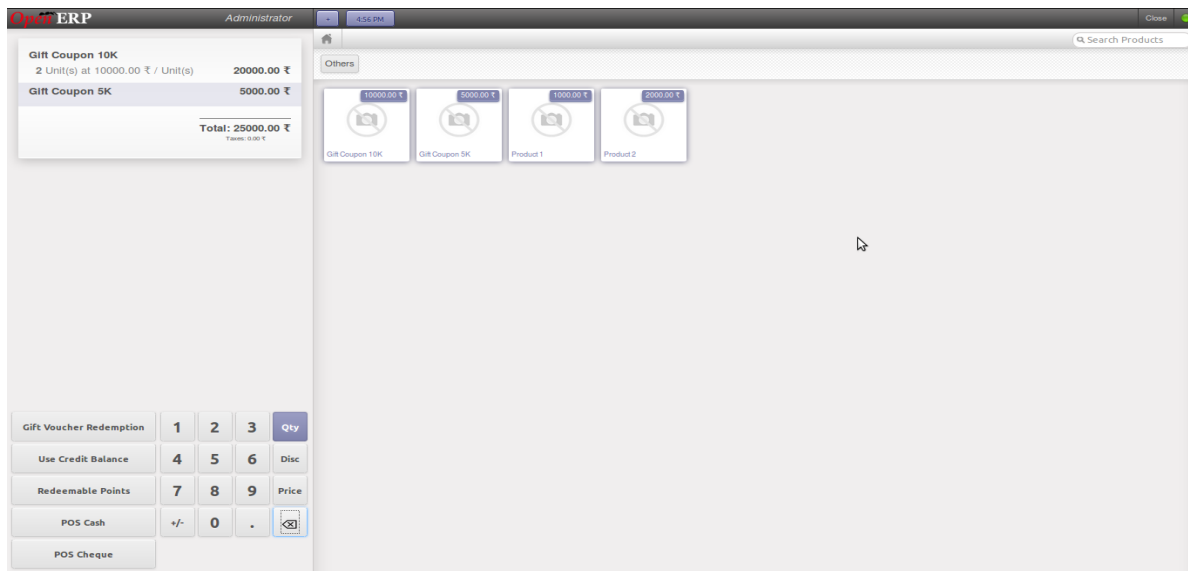
6. POS Transactions

Lets Perform some POS transactions for Gift Coupon Issue and Gift Coupon Redemption

6.1 Gift Coupon Issue

Path : Point of Sales ⟶ Daily Operations ⟶ Your Session

 User can create new session in order to sell products/ gift coupons through POS screen

Here are some of the products and gift coupons listed on RHS panel. Out of which I have selected two Gift Coupons as Gift Coupon 10k with Qty 2 and Gift Coupon 5K with Qty 1.

Assume this sales order is paid by cash as follows
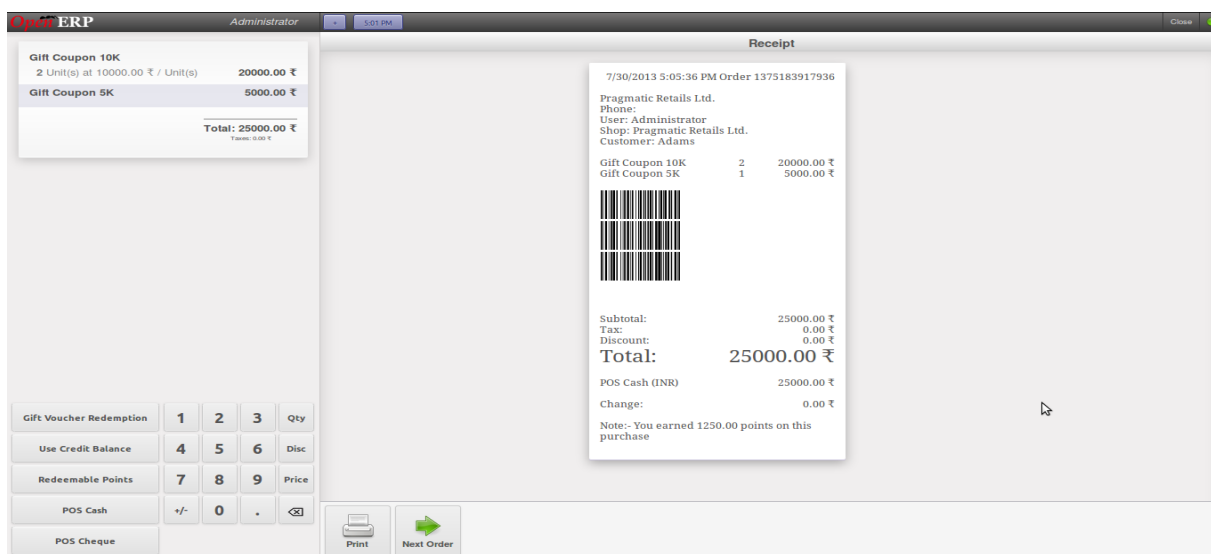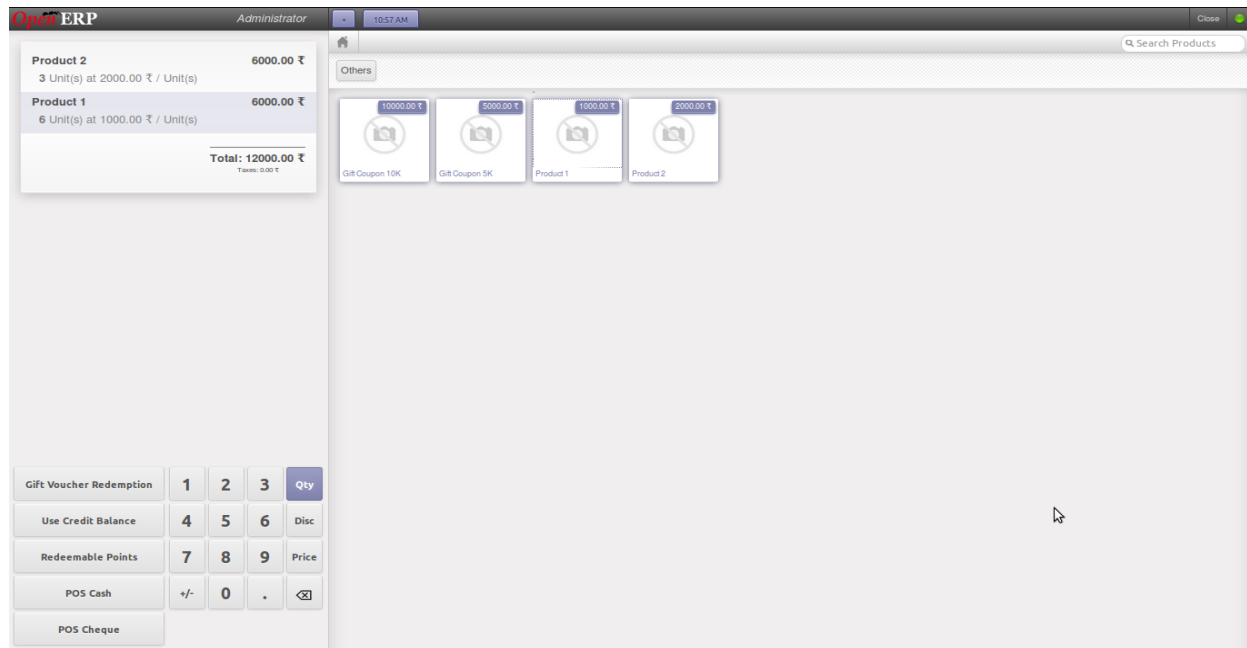
System will generate unique barcode for each of the gift coupon sold. These codes will have validity in no. of as days as defined in product master. These barcodes will be scanned at the time of Gift Coupon redemption.

6.2 Gift Coupon Redemption
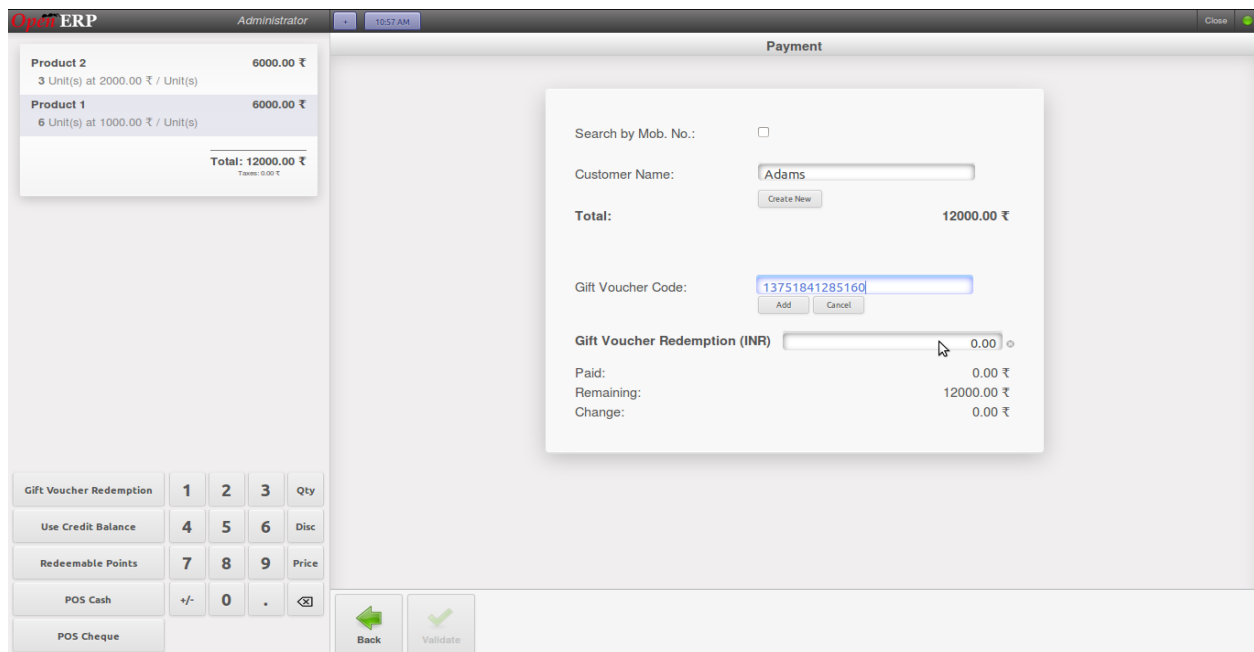
Path : Point Of Sales ⟶ Daily Transactions

Let's create one more POS order with purchase of couple of products as follows :

Now let's assume Mr. Adams wish to redeem his gift coupons against this purchase. So lets click on "Gift Voucher Redemption" payment method. This will bring following screen :
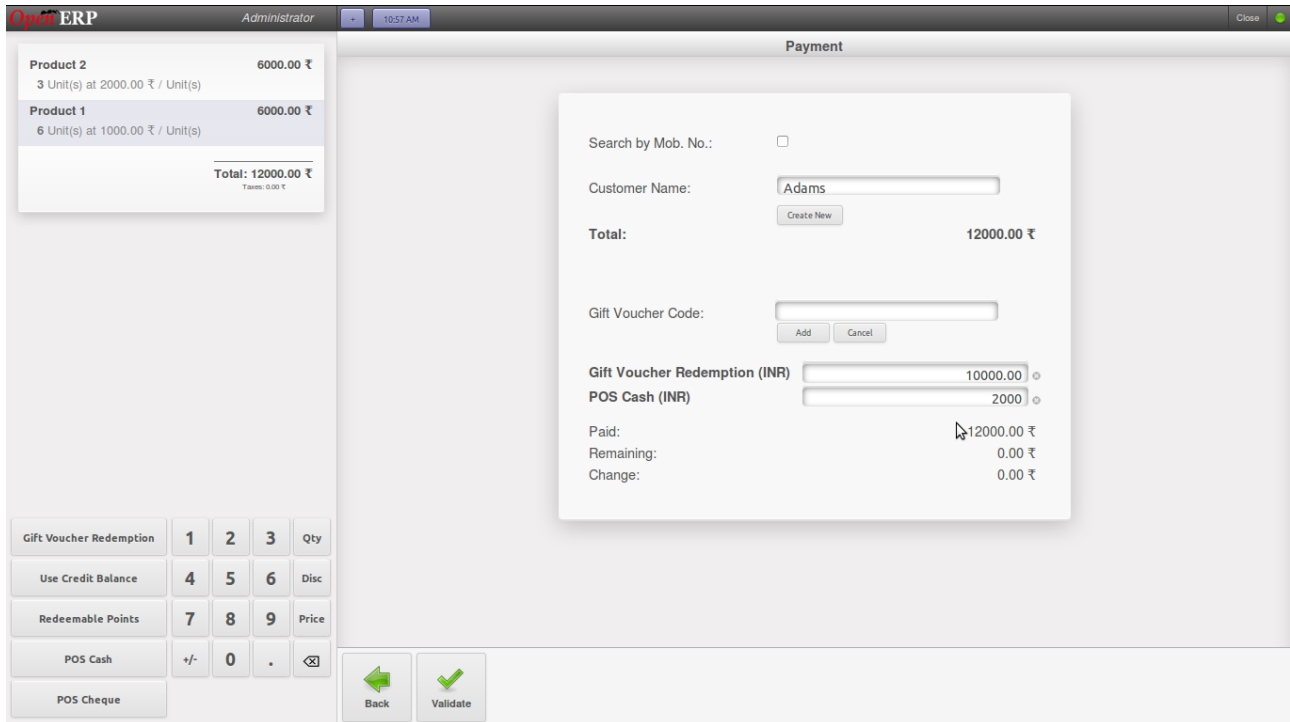
User can provide customer name for billing purpose.
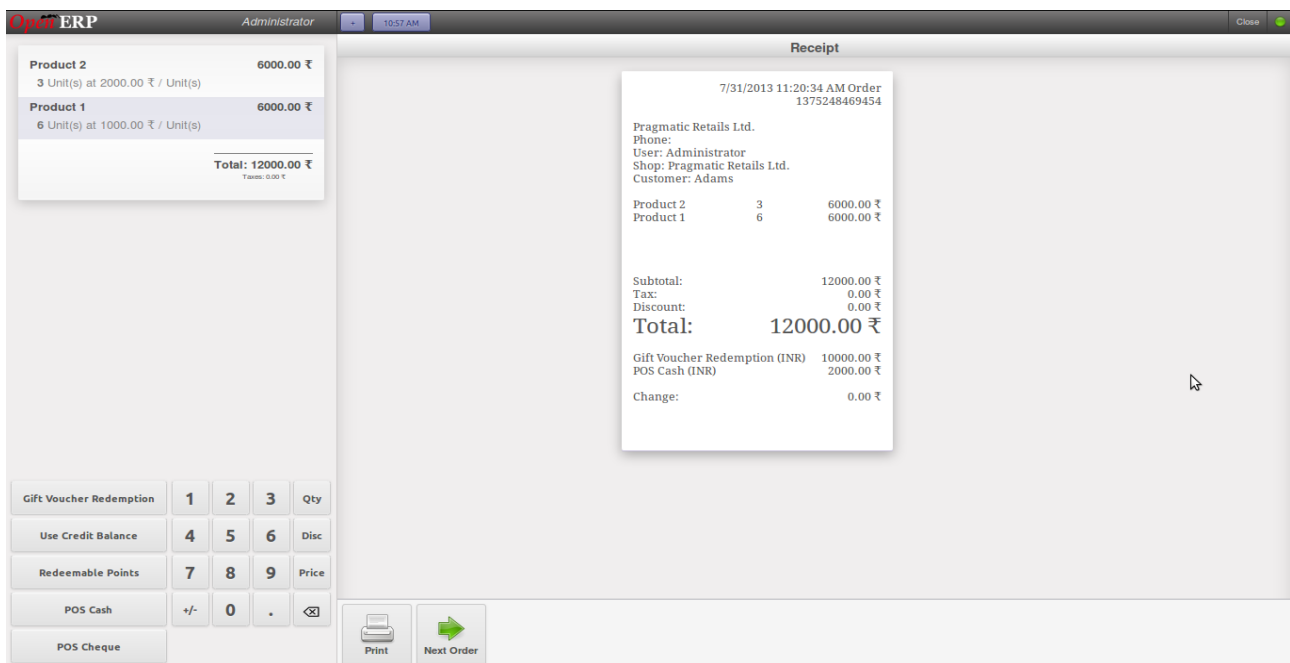
Gift Voucher Code : In this field user will have to scan Gift voucher code and click on add. System will bring corresponding amount in "Gift Voucher Redemption (INR)" field and will get deducted from the total bill amount.

Validations are maintained on gift voucher code in order to avoid unauthorized Gift Voucher Code scan or repeated scan of same Gift Voucher Code.

System will add up amount for all the scanned Gift Codes and displayed on the screen.

Balance amount can be accepted by other payment methods as Cash or Cheque etc.

6.3 Available Gift Voucher Codes

Path : Point of Sales ⟶ Configurations ⟶ Loyalty Management ⟶ Gift Voucher Analysis

This menu will allow user to check the Sold Vouchers , Redeemed Vouchers, Active Vouchers, Expired Gift Vouchers

7. Introduction to Retails Product Promotional Schemes

Product promotional schemes offered in retail industry has great impact on total sales turnover of business. No doubt that promotional schemes offer series of benefits to the industry than any other business communication can.

This module helps user to create different promotional schemes that suits to their business. promotional schemes created in OpenERP shall be utilize in POS module so that billing will be generated based on promotional schemes.

Promotional Schemes can be configured for :

- Specific product category/ products
- Specific date range
- Different locations/ branches

This document will elaborate the functionality of Promotional Schemes Management in retail industry.

8. Promotional Scheme Definition

As said earlier user can define multiple promotioanl schemes for :
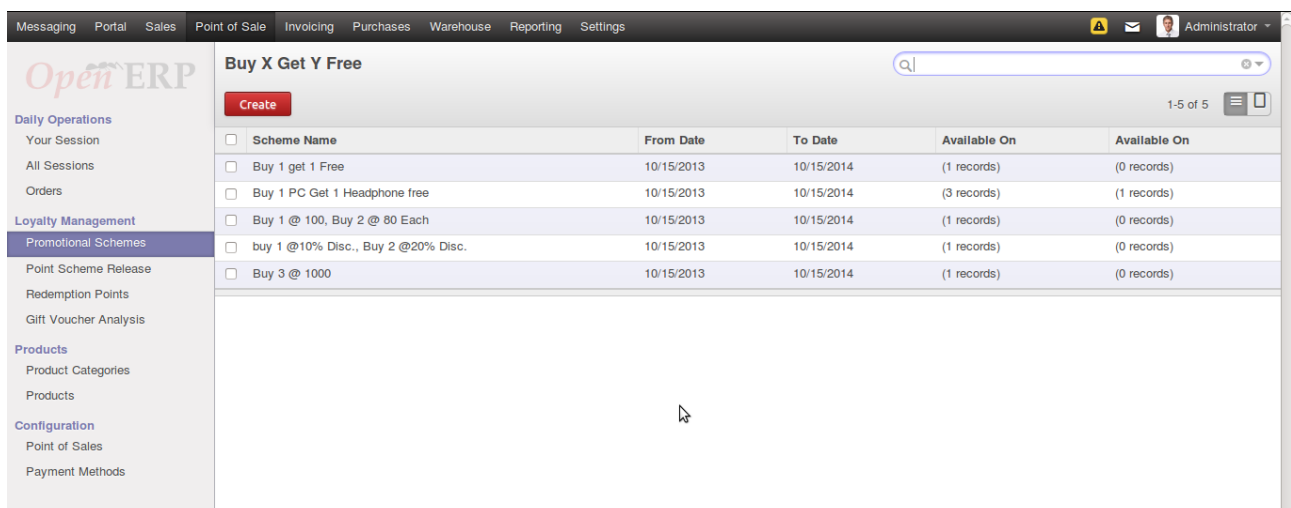
- Specific product category/ products
- Specific date range
- Different locations/ branches

There are some basic configuration forms we need to understand first as follows :

Promotional Scheme Creations

Path : Point Of Sale ⟶ Configuration ⟶ Loyalty Management ⟶ Promotional Schemes

Promotional Scheme allows user to defined different product promotional scheme between different date span.
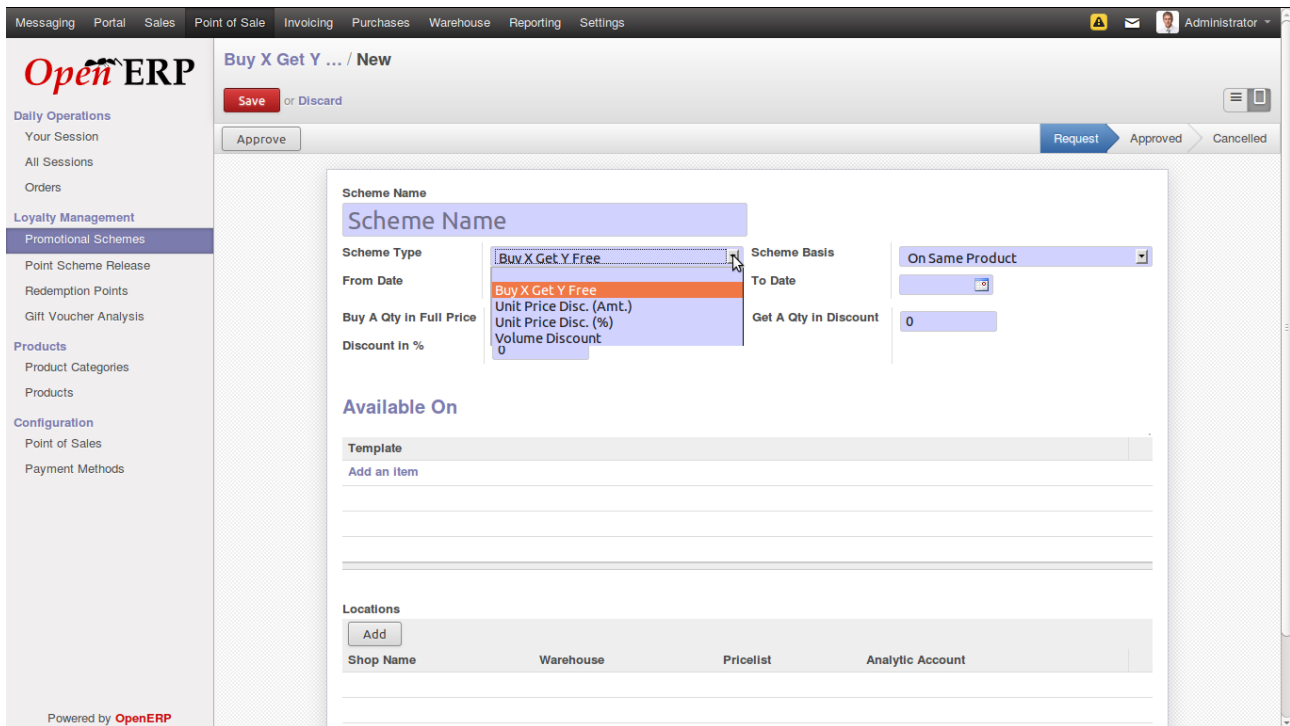

When click on Create button user can have an option to define Scheme type

There are 4 basic scheme types supported by the system so far as follows :

Scheme Name   **:** This is a text field where user can define promotional scheme name

Scheme Type   **:** This is Many 2 One field indicating fixed scheme type to be linked with given scheme

It contains fixed values Buy X, Get Y Free , Unit Price Disc. (Amt), Unit Price Disc. (%), Voulume Discount etc. User can select any of these as per the requirement

From Date   **:** It is a date from which given promotional scheme shall be made applicable

To Date   **:** It is a date till which given promotional scheme shall be made applicable

Rest field varies based on the Scheme type selected

Lets take examples one by one as follows.

8.1 Buy X, Get Y Free

This method user can offer Y products on discounted prices against the purchase of X products for stipulated quantity.
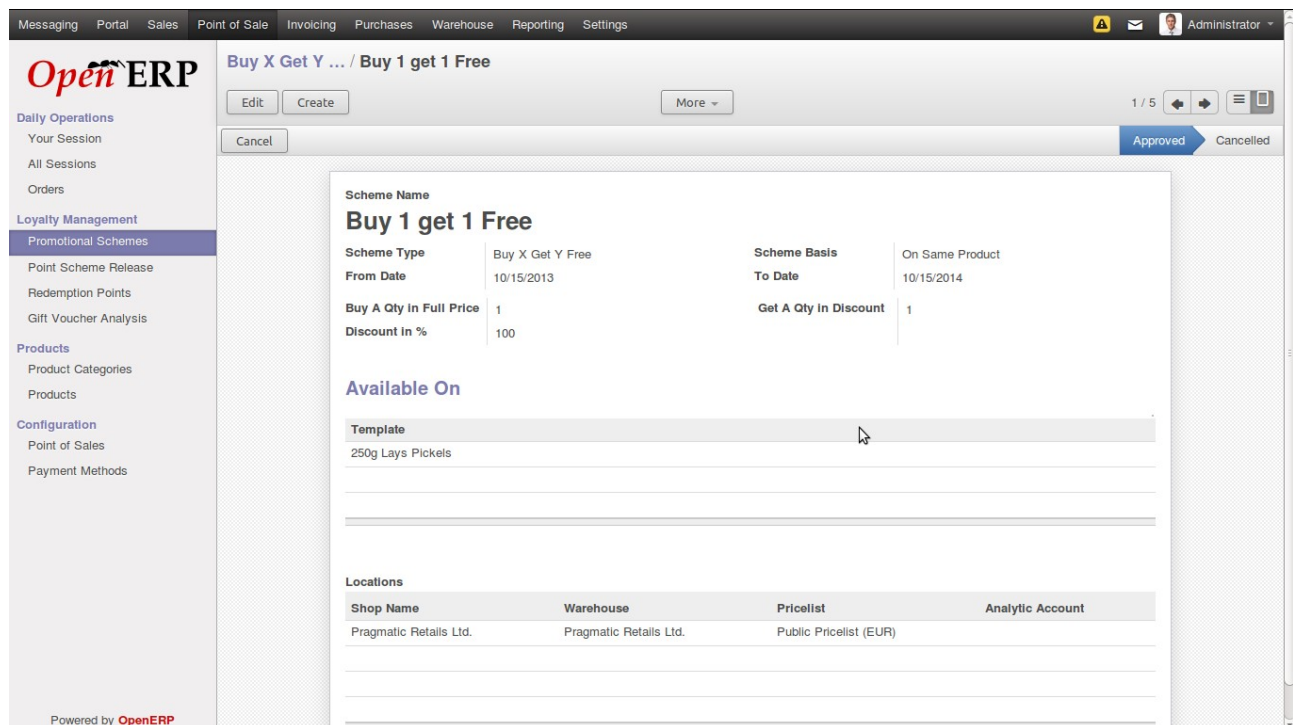
There are two subtypes for this scheme as follows

> **A. For Same products :**
>
>> In this case same products are offered at discounted price against purchase of stipulated quantity of products
>
>> **eg : Buy 1 Pizza Get 1 Free**
>>
>>> **Buy 3 T-shirt Get 1 Free**

Scheme Name : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects "Buy X, Get Y Free"

Scheme Basis : This field is only activated for "Buy X, Get Y Free" scheme type.

Buy a quantity in full price : This is a quantity that should customer purchase in full amount for a selected product. If user purchase quantities in equal to this then only scheme will be made applicable

> **B. For Different Products :**
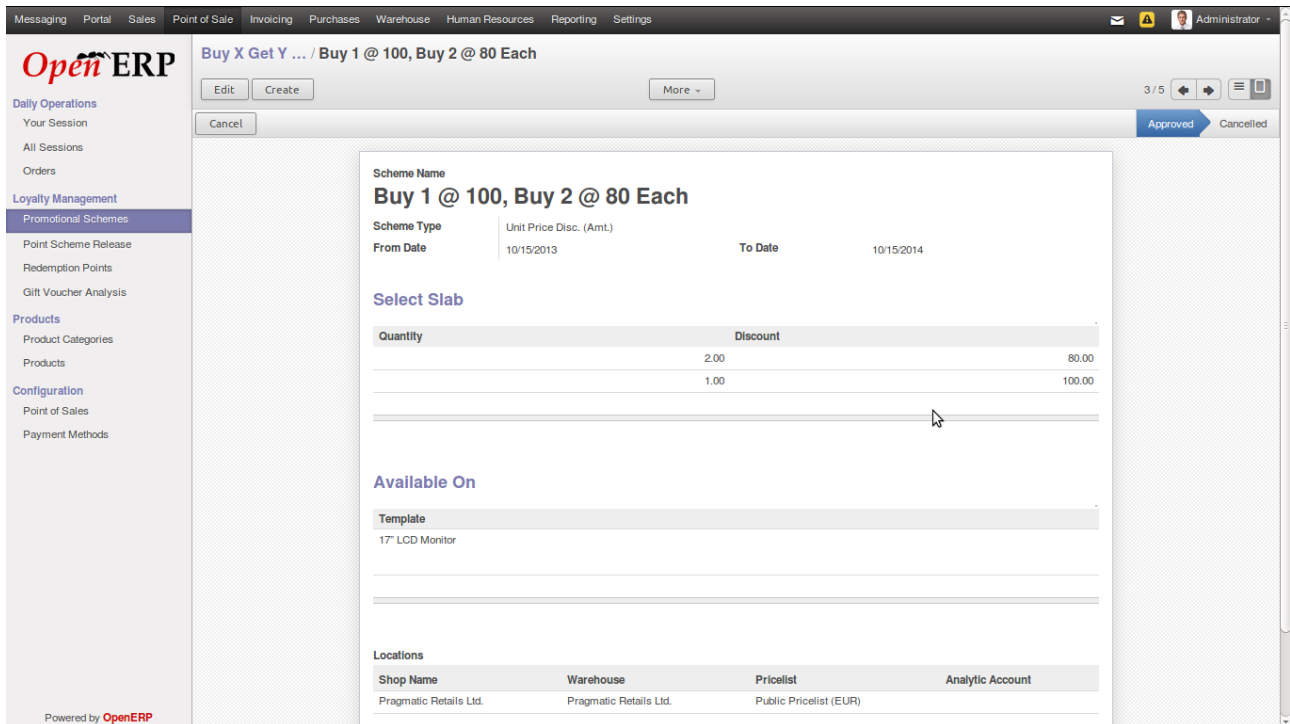>> In this case discounted prices are offered on Different products that actully procured.
>
>> **eg : Buy 1 Computer Get 1 Headphone Free**
>>> **Buy 2 Trousers Get 1 T-shirt Free.**
>>> **Buy 20 KG Rice and GET 1 Kg of Sugar Free**
>>> **Get TV Tuner at 50% Disc. with 1 Compaq Laptops**

8.2 Unit Price Discount (Amt)

Though this method user can offer quantity wise unit price discount for selected product

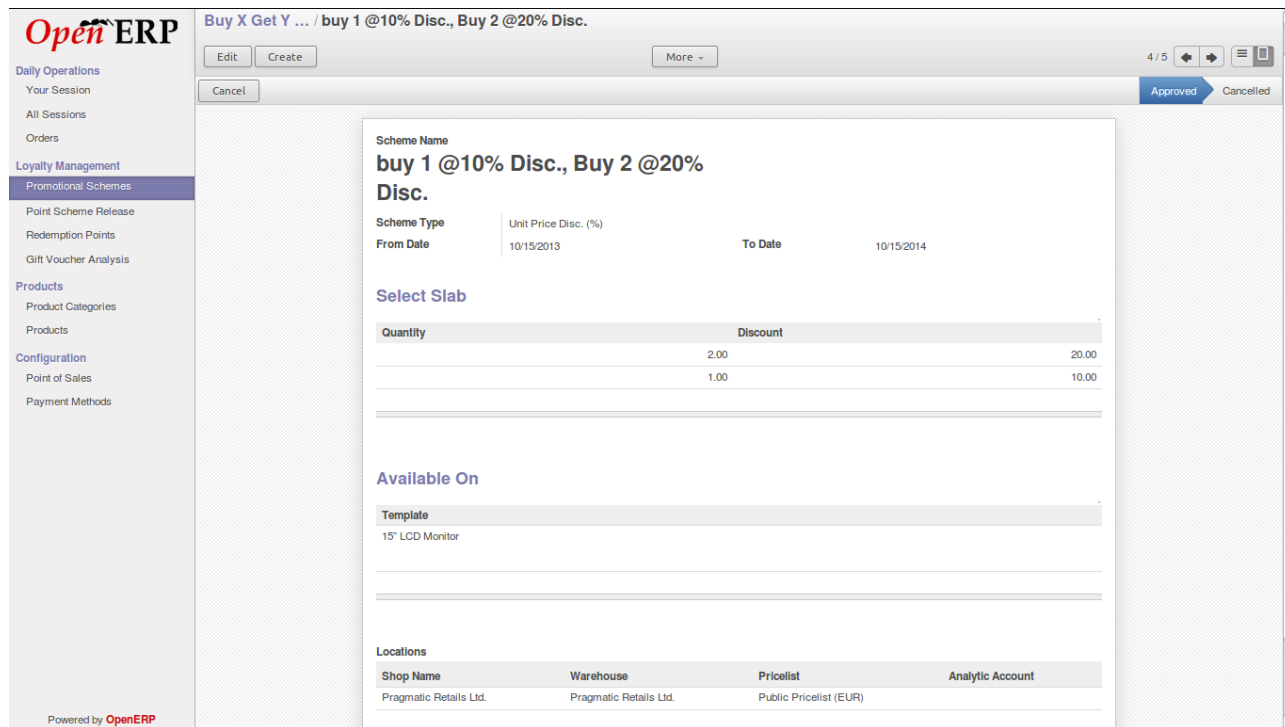**Scheme Name** : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects "Unit Price discount (Amt)"

Select Slab : Here, user can create quantity slabs with unit price definition. In above example there are two slabs I.e if 1 Quantity is purchased then per unit price will be 100 & if 2 quantities are purchased then per unit price will be 80.

Available on : This is many to many field where user can select products for which above scheme need to be made applicable.

Locations : This is many to many field where user can select different branches for which above scheme need to be made applicable.

8.3 Unit Price Discount (%)

Though this method user can offer quantity wise discount in % on sales price of selected product

Scheme Name : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects "Unit Price discount (%)"

Select Slab : Here, user can create quantity slabs with discount percentage. In above example there are two slabs I.e if 1 Quantity is purchased then 10% discount & if 2 quantities are purchased then 20% of discount is offered on sales price.

Available on : This is many to many field where user can select products for which above scheme need to be made applicable.

Locations : This is many to many field where user can select different branches for which above scheme need to be made applicable.

8.4 Volume Discount

Above scheme offers user to create quantity volume based price for a given set of products. In following example

Windows 7 Profession Product is selected and if customer purchases 3 quantities of it in one purchase then its total price will be adjusted to Rs. 1000 even if its

***** Thank You *****