
odoo
Point of Sale

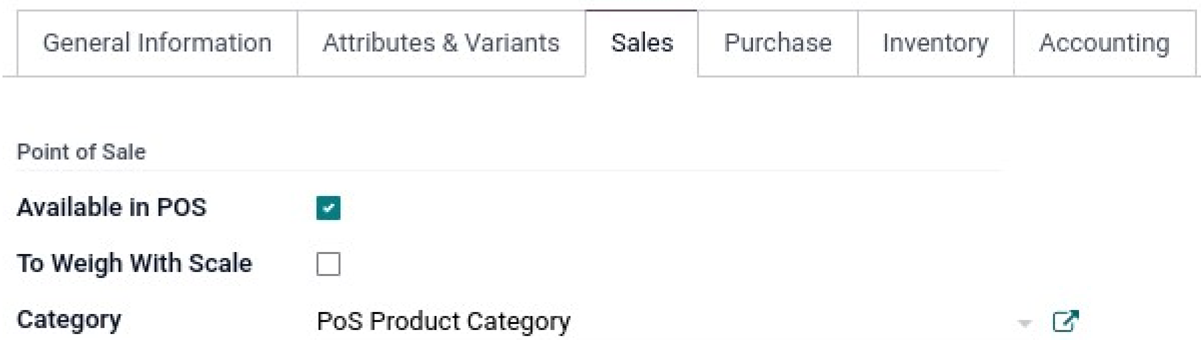
Getting started

Point of Sale is a fully integrated application that allows you to sell products (online or offline) with any device. It also automatically registers product moves in your stock, gives you real-time statistics, and consolidations across all shops.

Configuration

Make products available

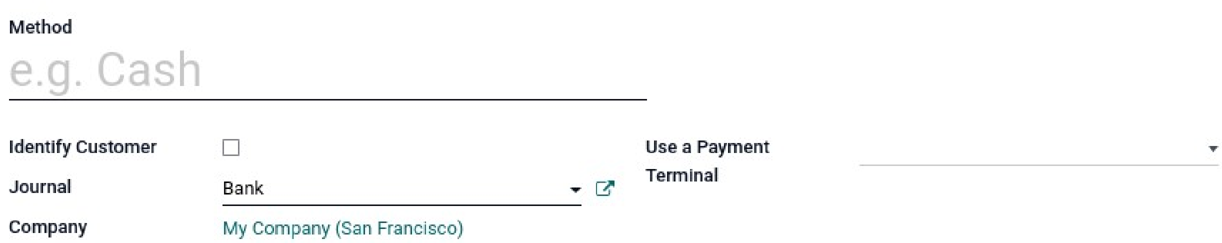
To make products available for sale, go to **Point of Sale** ‣ **Products** ‣ **Products**, and select a product to open the product form. In the **Sales** tab, enable **Available in POS**.



Configure payment methods

To add a payment method, you first need to create it. Go to **Point of Sale** ‣ **Configuration** ‣ **Payment Methods** ‣ **Create**, and set a name. Check **Identify Customer** to allow this payment method *exclusively* for registered customers.

Then, select the **Journal**. Choose **Cash** to use this payment method for cash payments, or **Bank** to use it for card payments.



Once the payment method is created, you can select it in your POS settings. To do so, go to **Point of Sale** ► **Configuration** ► **Point of Sale** and select a POS for which you wish to make the payment method available. Click **Edit** and add the payment method under the **Payments** section.

POS sessions

Start a session

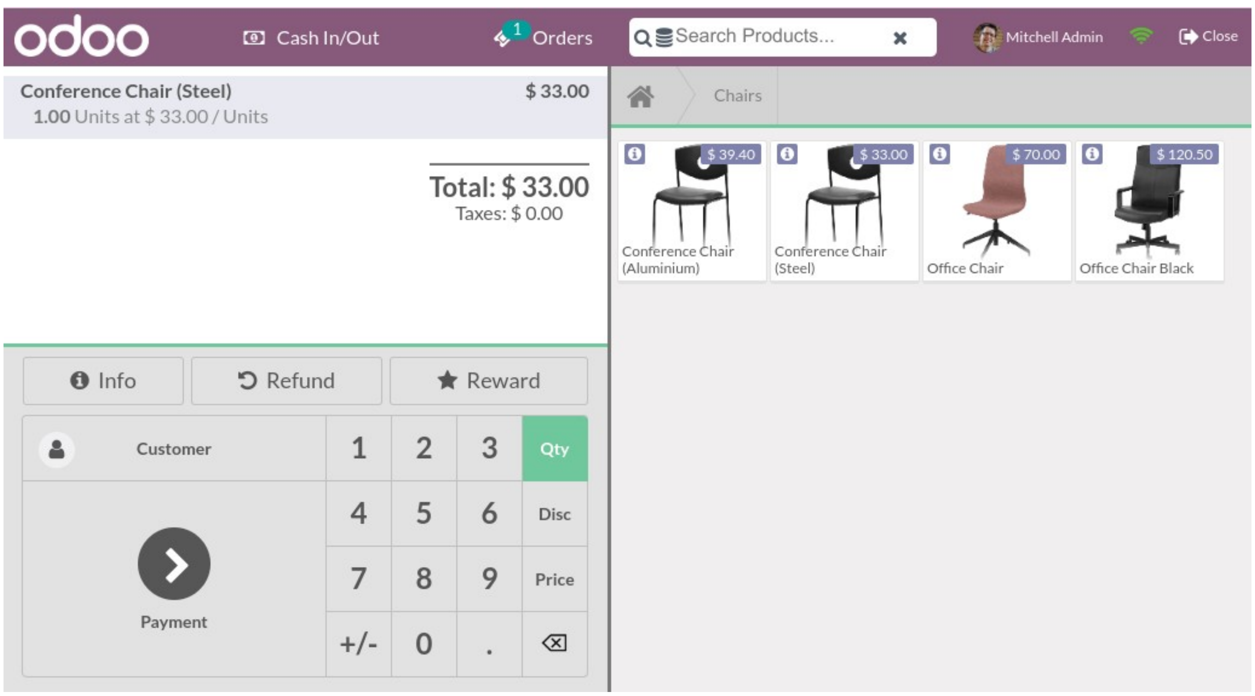
From the **POS dashboard**, click **New Session** and at the **Opening Cash Control** screen, click **Open Session** to start a POS session, or click **Continue Selling** if the session is already opened.

Note

Multiple users can be connected to the same session at the same time. However, the session can only be opened once on the same browser.

Click products to add them to the cart. To change the **quantity**, click **Qty** and enter the number of products using the keypad. To add a **discount** or modify the product **price**, click respectively **Disc** or **Price** and enter the amounts.

Once an order is completed, proceed to checkout by clicking **Payment**. Select the **payment method**, enter the received amount, and click **Validate**. Click **New Order** to move on to the next customer.



Return and refund products

To return and refund a product,

1. start a session from the **POS dashboard**;
2. click **Refund** and select the corresponding order;
3. select the product and the quantity to refund using the keypad;

4. click **Refund** to go back to the previous screen;
5. once the order is completed, click **Payment** to proceed to the refund;
6. click **Validate** and **New Order** to move on to the next customer.

Note

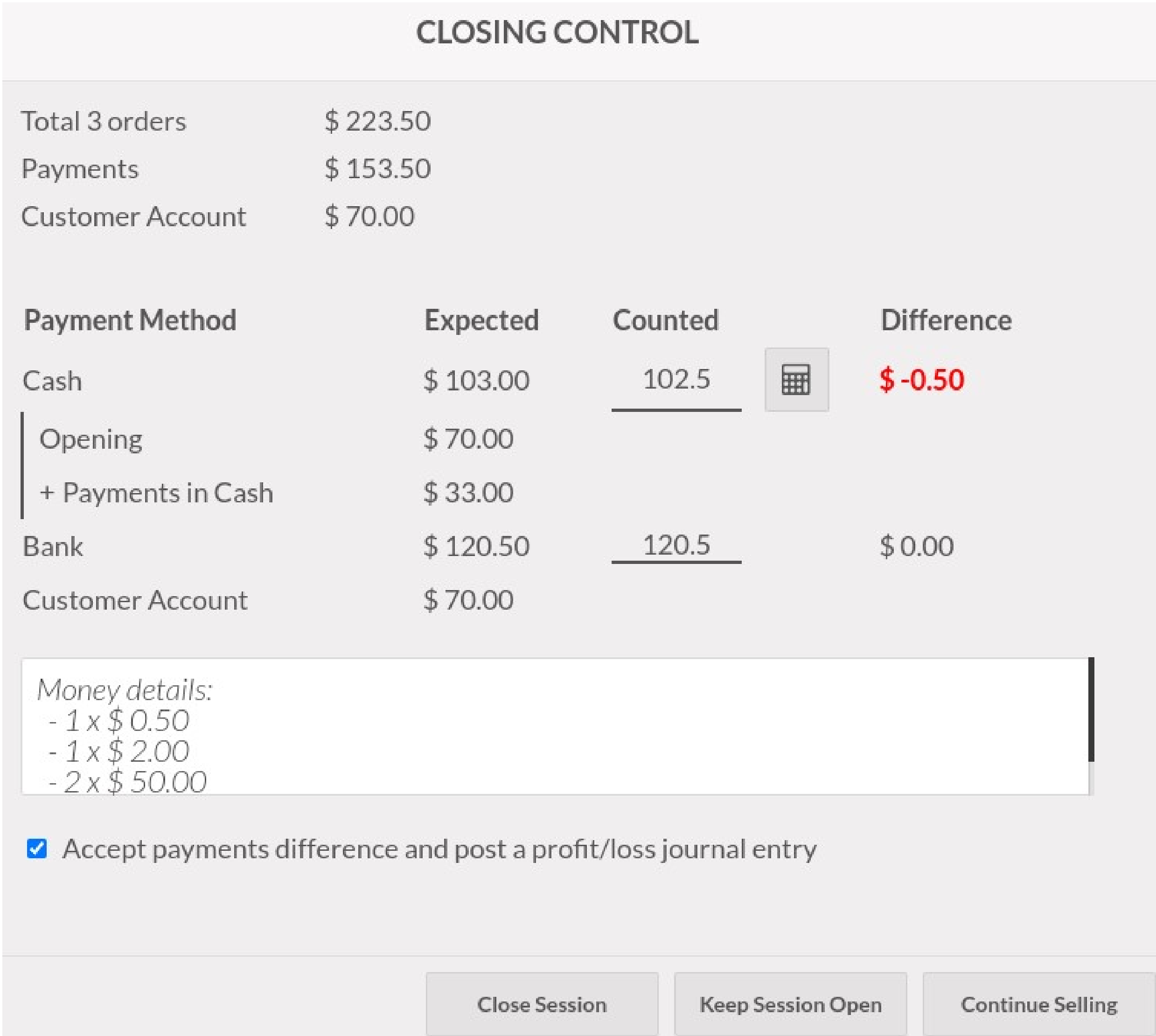
- You can filter the **orders list** by **Receipt Number**, **Date** or **Customer** using the search bar.
- You can also refund a product by selecting the returned product from an open session, and setting a negative quantity that equals the number of returned products. To do so, click **Qty** and **+/-**, followed by the quantity of returned products.

Close the POS session

To close your session, click **Close** in the upper right corner of your screen; doing so opens the **Closing Control** pop-up screen. From this screen, you can retrieve various information:

- the number of orders made and the total amount made during the session;
- the total of all the transactions made during the session grouped by payment method;
- the expected amounts grouped by payment method.

Before closing this window, count your cash using the calculator icon. Doing so opens a pop-up window that computes the total amount in the cash drawer depending on the coins and bills counted and added manually. Then, click **Confirm** or **Discard** to close the window. The computed amount is set in the **Counted** column, and the **Money Details** are specified in the **Notes** section.



Once you are done controlling the amounts, click **Close Session** to close and go back to the **POS dashboard**.

Note

- You can let the session open by clicking **Keep Session Open** or abort and keep selling by clicking **Continue Selling**.
- Depending on your setup, you might not be allowed to close a session if the expected cash revenue does not equal the counted cash. To close the session, check **Accept payments difference and post a profit/loss journal entry**.

Tip

- It is strongly advised to close your POS session at the end of each day.
- To look at all your previous sessions, go to **Point of Sale ‣ Orders ‣ Sessions**.

View statistics

To access your statistics, go to **Point of Sale ‣ Reporting ‣ Orders**. Or, from the **POS dashboard**, click the vertical ellipsis (⋮) button, **Reporting**, and **Orders**.

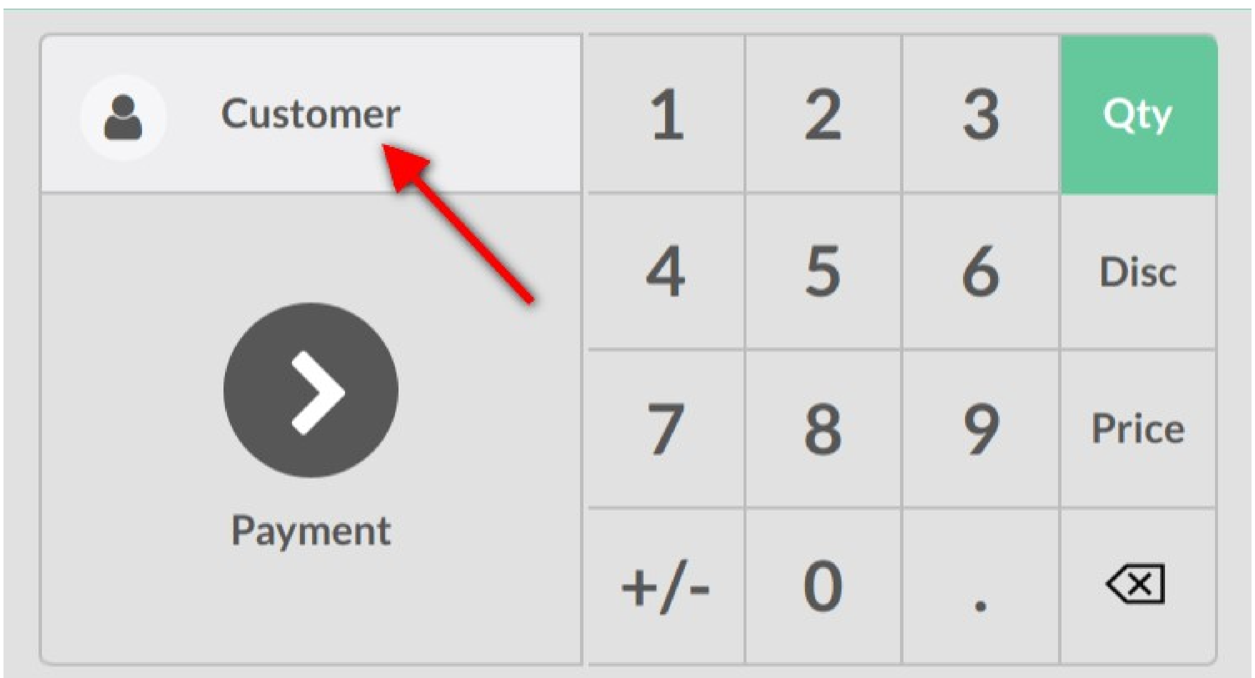
These statistics are available in a graph or pivot view that you can filter or group depending on your needs.

Register customers

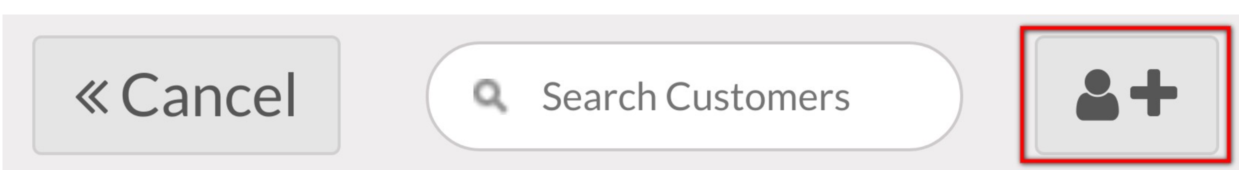
Registering your customers will give you the ability to grant them various privileges such as discounts, loyalty program, specific communication. It will also be required if they want an invoice and registering them will make any future interaction with them faster.

Create a customer

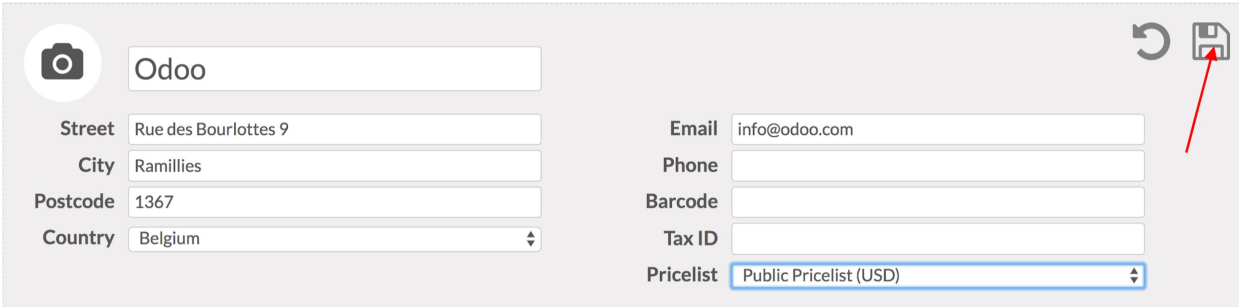
From your session interface, use the customer button.



Create a new one by using this button.



You will be invited to fill out the customer form with their information.



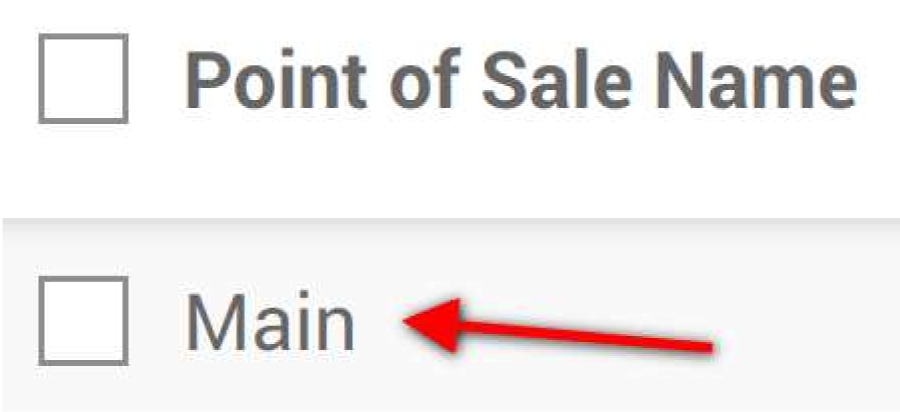
Use the save button when you are done. You can then select that customer in any future transactions.

Invoice from the PoS interface

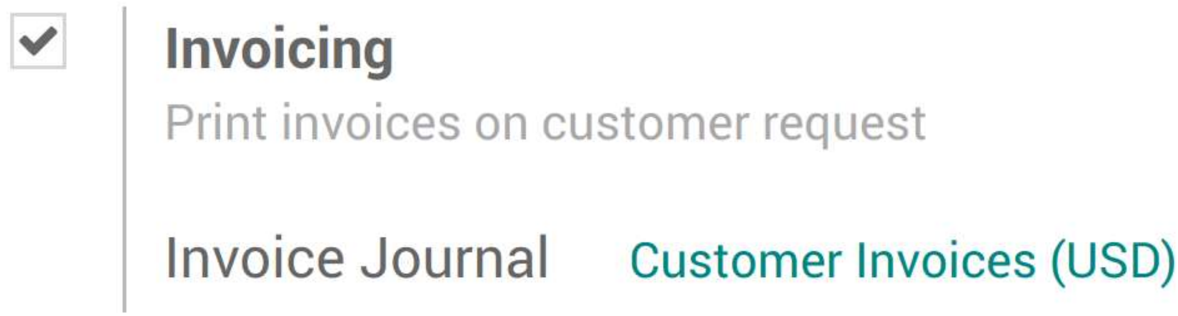
Some of your customers might request an invoice when buying from your Point of Sale, you can easily manage it directly from the PoS interface.

Activate invoicing

Go to **Point of Sale** ‣ **Configuration** ‣ **Point of Sale** and select your Point of Sale:

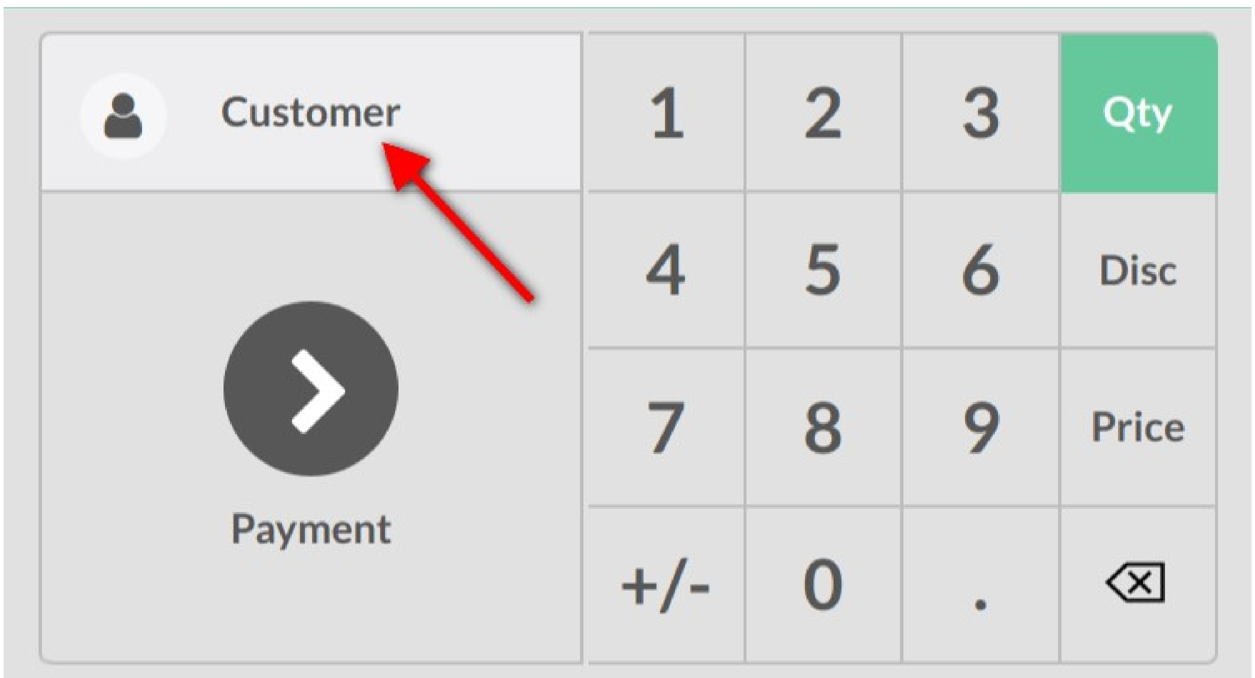


Under the *Bills & Receipts* you will see the invoicing option, tick it. Don’t forget to choose in which journal the invoices should be created.

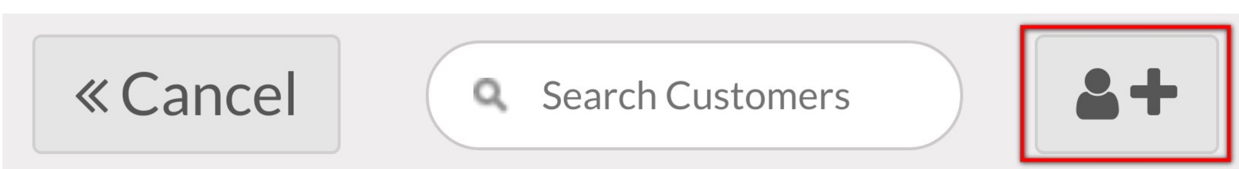


Select a customer

From your session interface, use the customer button



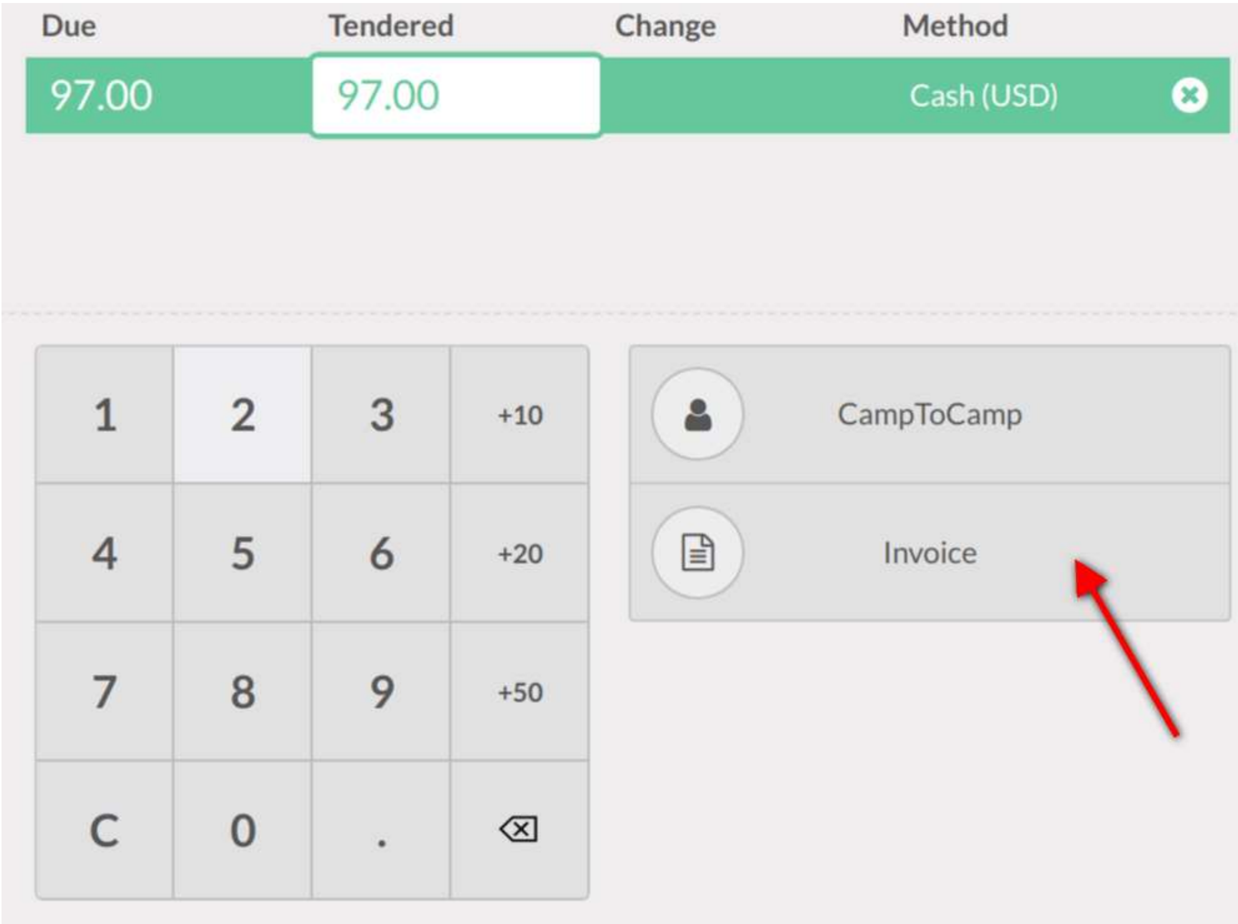
You can then either select an existing customer and set it as your customer or create a new one by using this button.



You will be invited to fill out the customer form with its information.

Invoice your customer

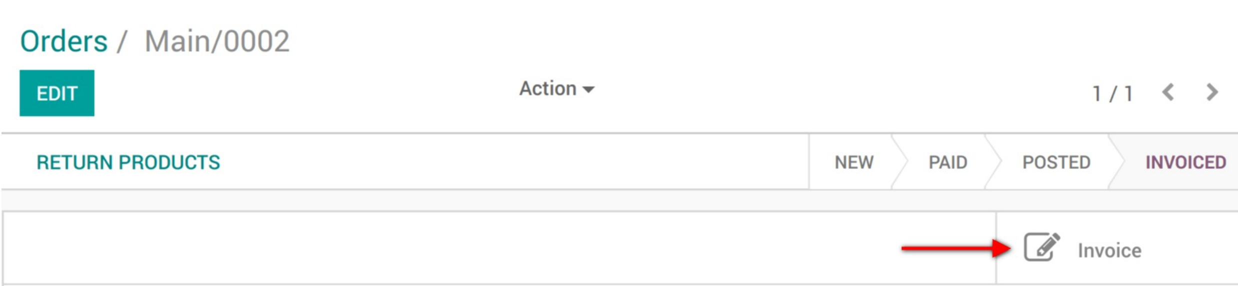
From the payment screen, you now have an invoice option, use the button to select it and validate.



You can then print the invoice and move on to your next order.

Retrieve invoices

Once out of the PoS interface (**Close** ‣ **Confirm** on the top right corner) you will find all your orders in **Point of Sale** ‣ **Orders** ‣ **Orders** and under the status tab you will see which ones have been invoiced. When clicking on a order you can then access the invoice.

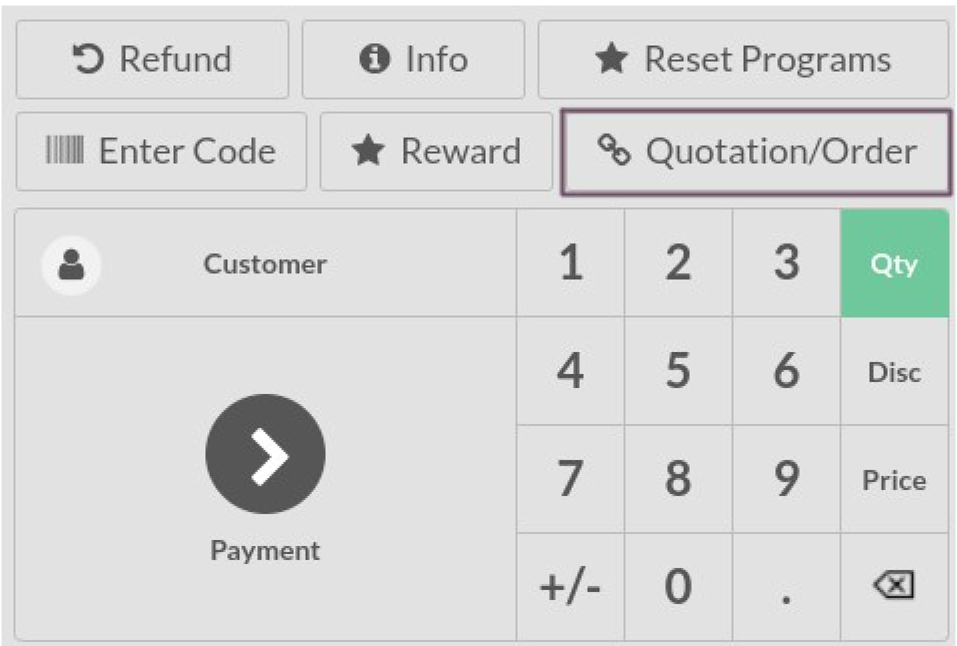


Sales orders in PoS

When working in retail, you might need to order products directly from your Point of sale. Fortunately, Odoo Point of Sale is fully integrated with Odoo Sales, meaning that you can create a sales order and pay for it directly from your point of sale.

Select a sales order

From the **Point of Sale** application, open a new session. Then, click on **Quotations/Orders** to get the complete list of quotations and sales orders created on the sales application.



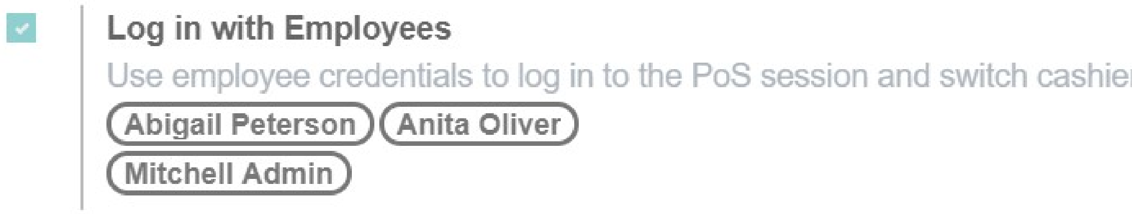
Log in with employee

With Odoo *Point of Sale*, you can manage multiple cashiers. This feature allows you to keep track of who is working, when and how much each cashier made for that session.

There are three ways to switch cashiers in Odoo: by *selecting the cashier*, by *entering a PIN code* or by *scanning a barcode*.

Set up log in with employees

To enable the feature, go to your *PoS settings* and check log in with employees on your *PoS form*. Then, add the employees that have access to the cash register.



Now, you can switch cashier easily.

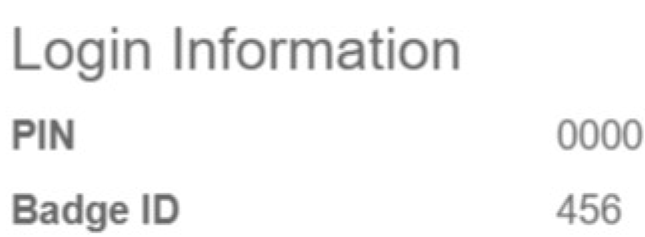
Switch without pin codes

The easiest way to switch cashiers is without a code. To do so, click on the cashier name in your PoS interface.

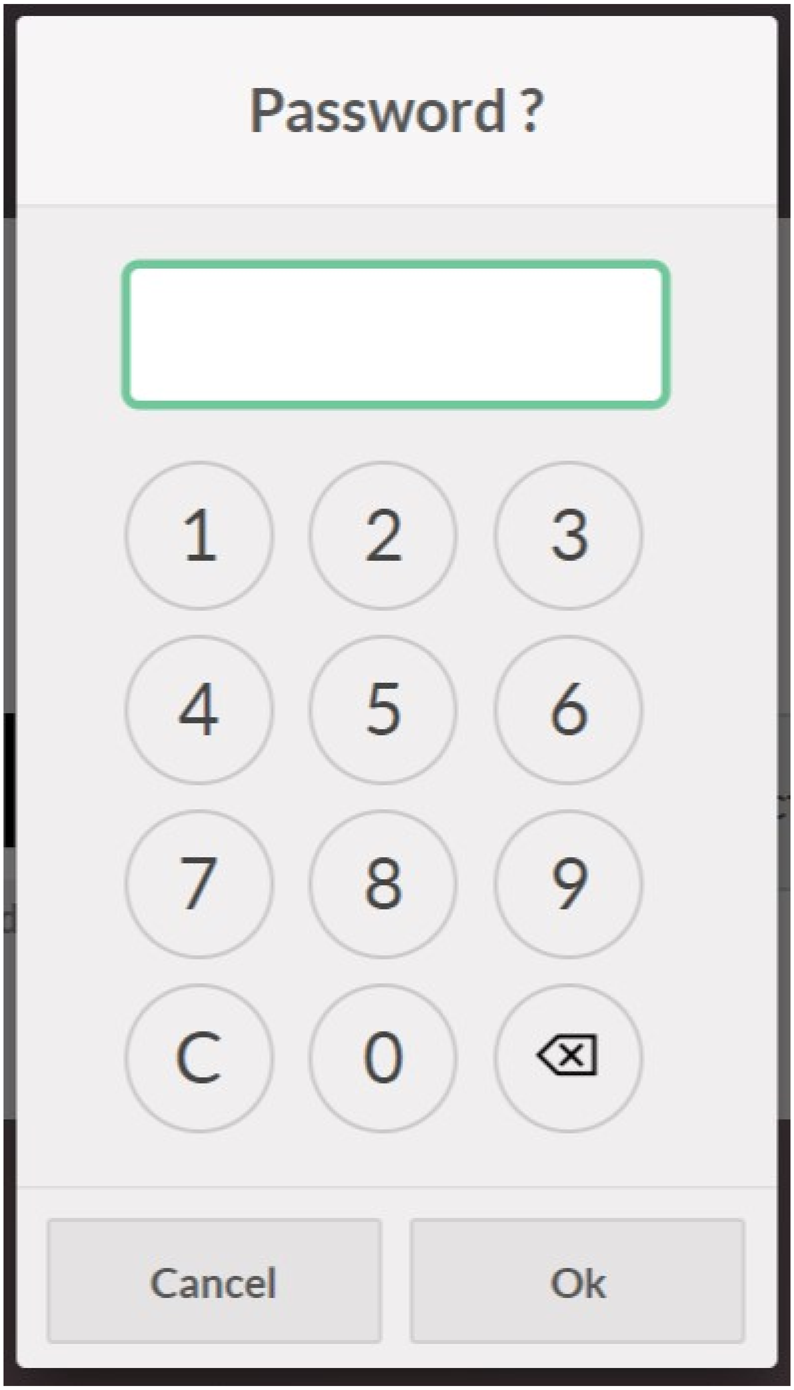
Now, you just have to click on your name.

Switch cashier with pin codes

You can set a pin code on each cashier. To set up a pin code, go to the employee form and add a security PIN, in the *HR settings tab*.

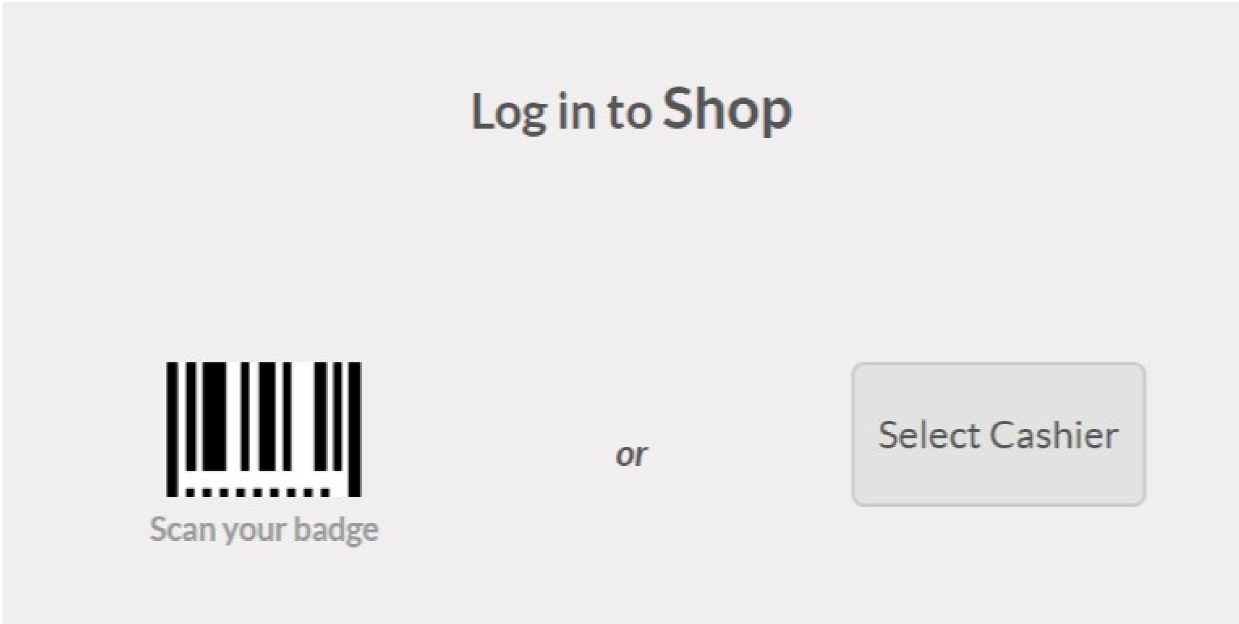


Now, when switching cashier, a PIN password will be asked.



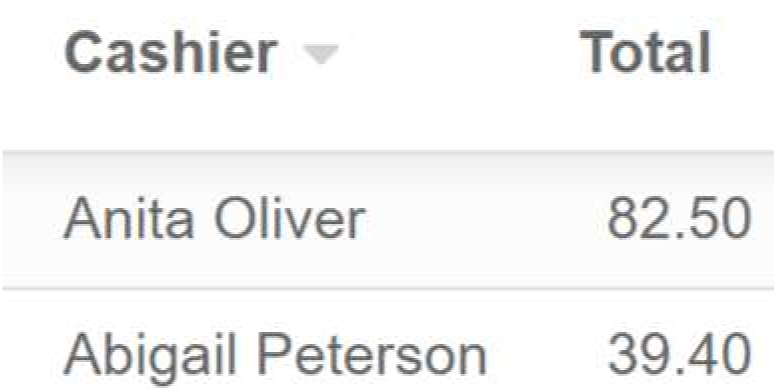
Switch cashier with barcodes

You can ask your employees to log themselves with their badges. To do so, set up a barcode at the same place you add the PIN code. Print the badge and when they will scan it, the cashier will be switched to that employee.



Find who was the cashier

Once you have closed your *PoS session*, you can have an overview of the amount each cashier sold for. To do so, go to the orders menu.



Now, you can open the order and have a summary of the sold products.

Reprint Receipts

Use the *Reprint receipt* feature if you have the need to reprint a ticket.

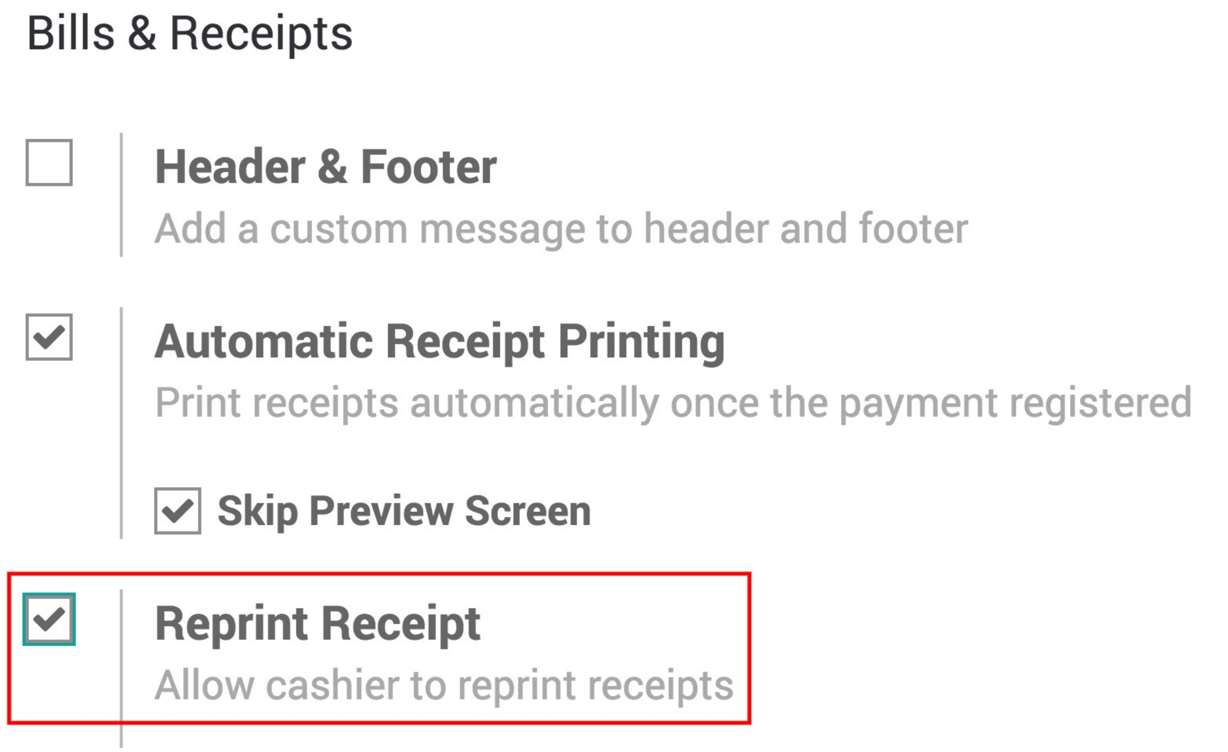
Configuration

To activate *Reprint Receipt*, go to **Point of Sale ‣ Configuration ‣ Point of sale**. and select your PoS interface.

Under the Bills & Receipts category, you will find *Reprint Receipt* option.

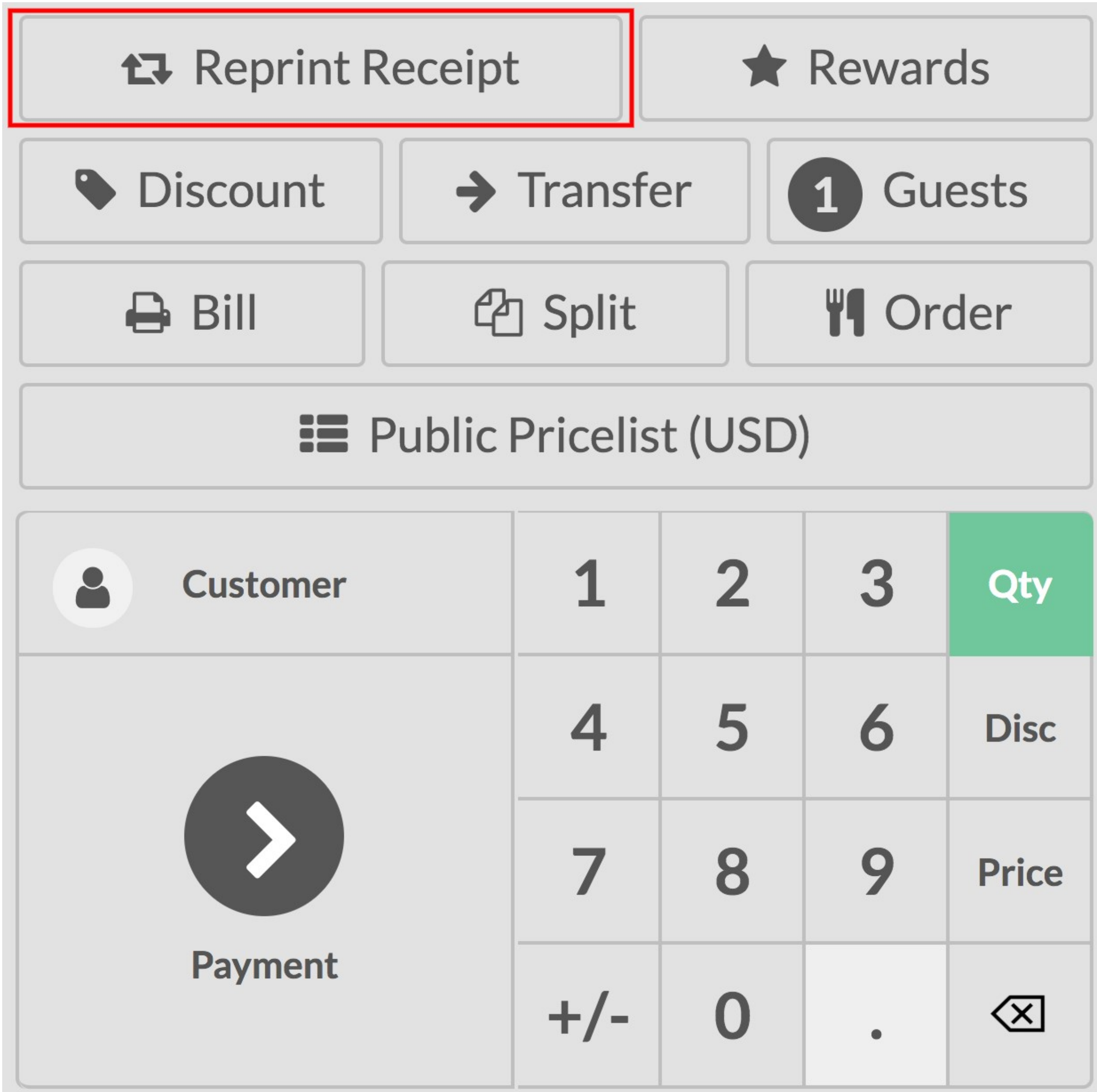
Note

In order to allow the option reprint receipt, you need to activate the receipt printer.

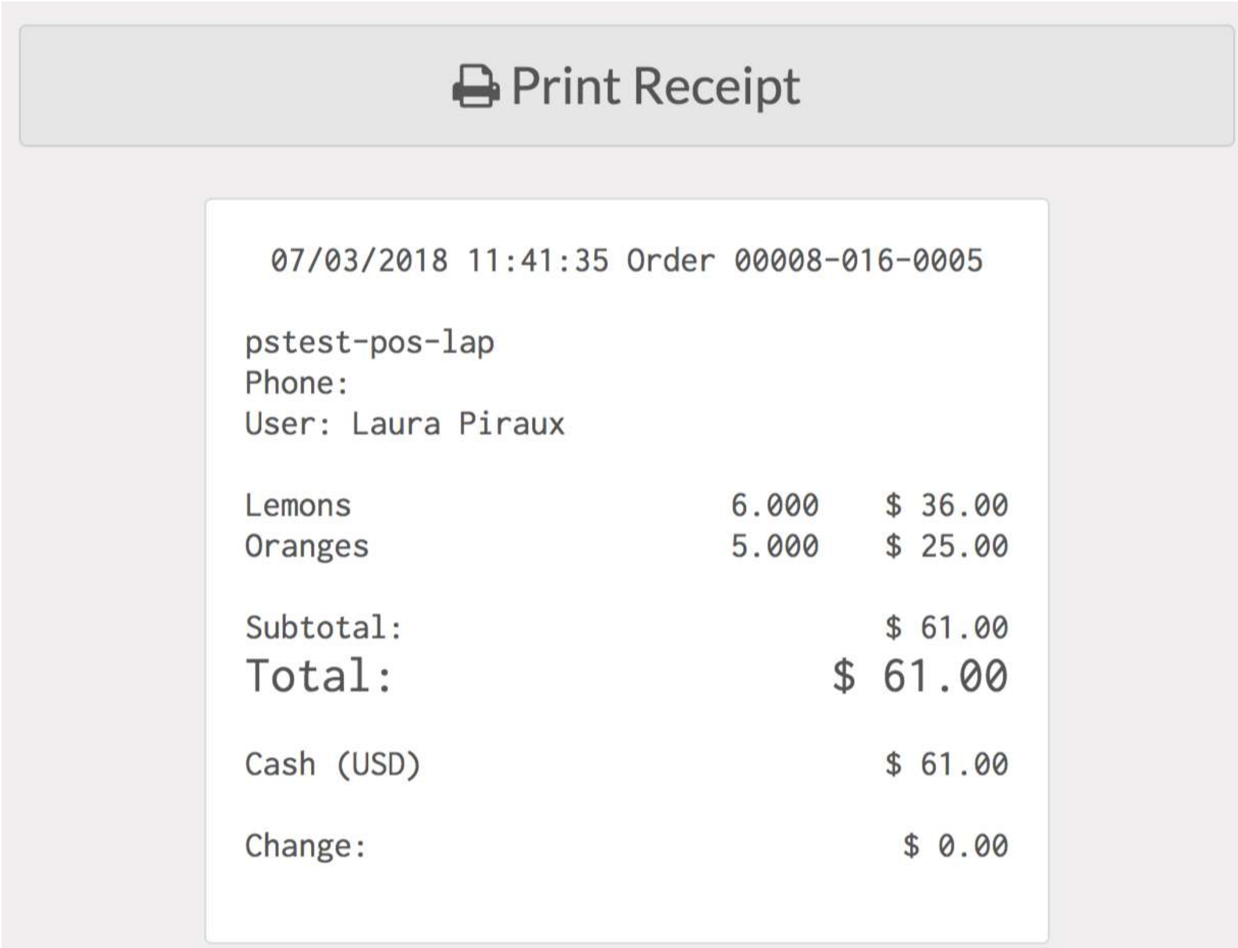


Reprint a receipt

On your PoS interface, you now have a *Reprint receipt* button.



When you use it, you can then reprint your last receipt.



Apply Discounts

By offering discounts, you can entice your customers and drastically increase your revenue. It is vital to offer discounts, whether they are time-limited, seasonal or manually given.

To manage discounts, Odoo has powerful features that help set up a pricing strategy tailored to every business.

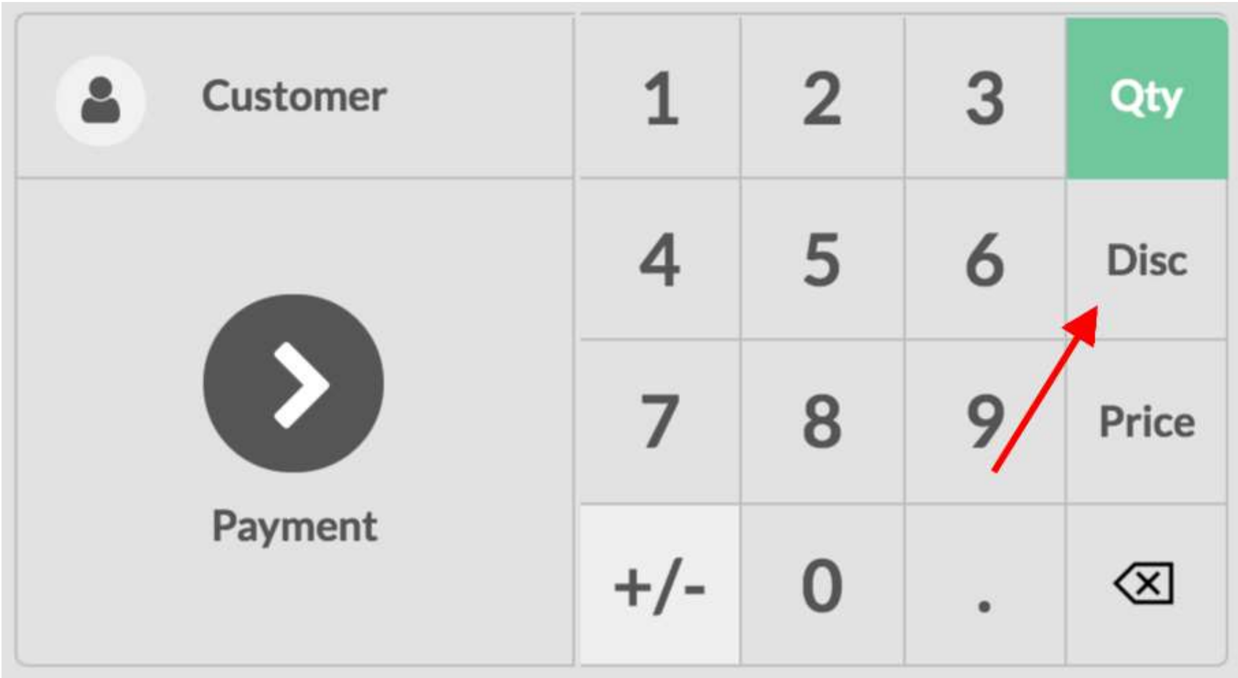
Apply manual discounts

If you seldom use discounts, applying manual ones might be the easiest solution for your Point of Sale.

You can either apply a discount on the whole order or on specific products inside an order.

Apply a discount on a product

From your PoS session interface, use the *Disc* button.

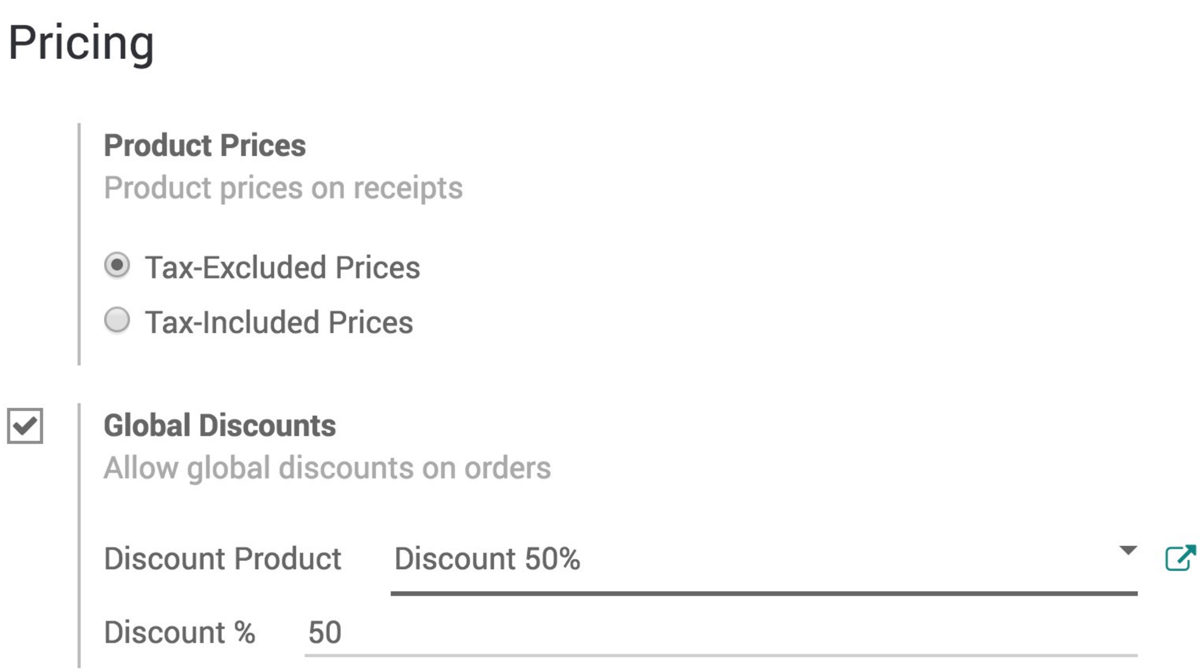


Then, you can input a discount over the product that is currently selected.

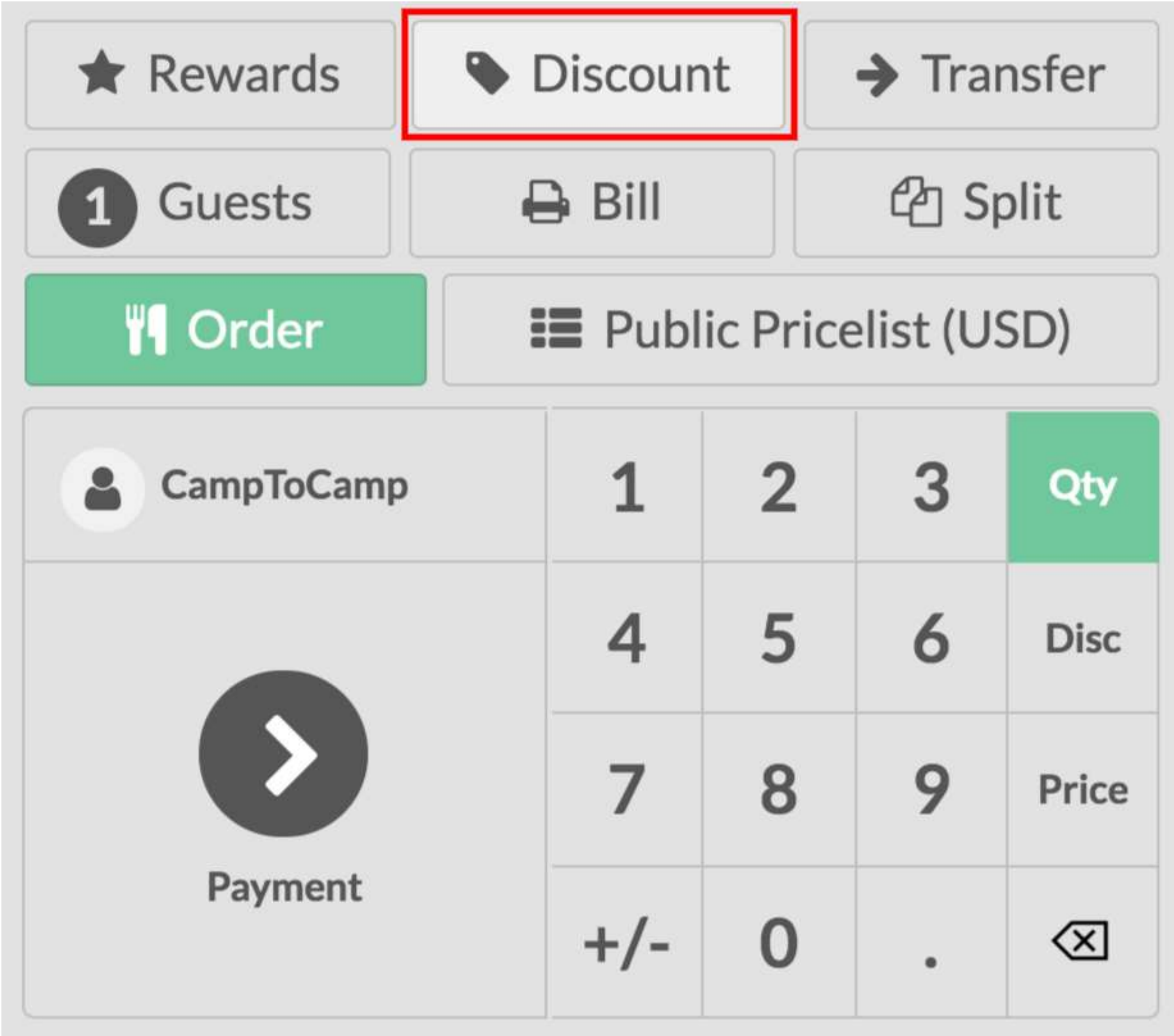
Apply a global discount

To apply a discount on the whole order, go to **Point of Sales ‣ Configuration ‣ Point of Sale** and select your PoS.

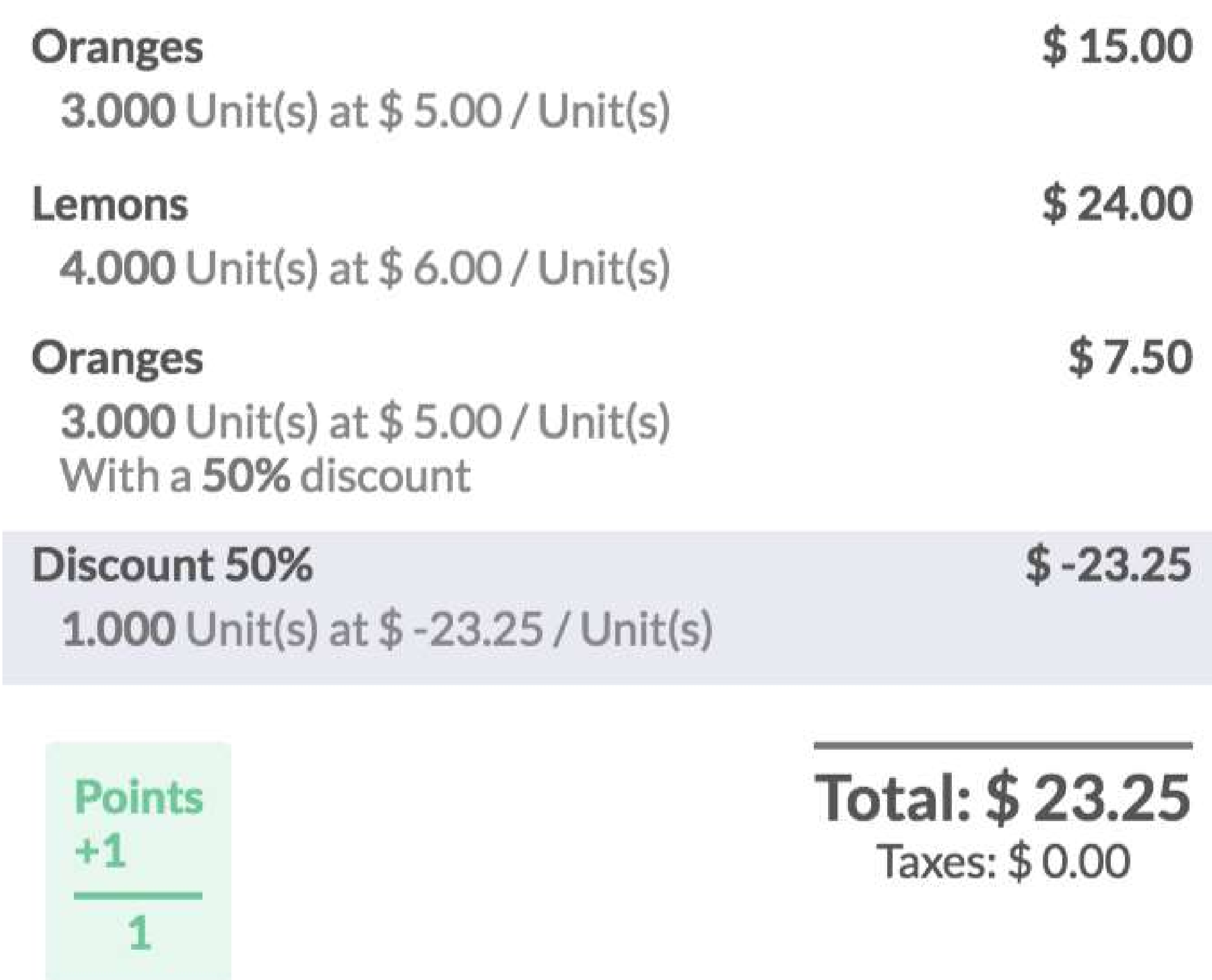
Once on your PoS form, select *Global Discounts*, under the *Pricing* category.



Now, you have a new *Discount* button appearing on your PoS interface.



Click on it and enter the wanted discount.

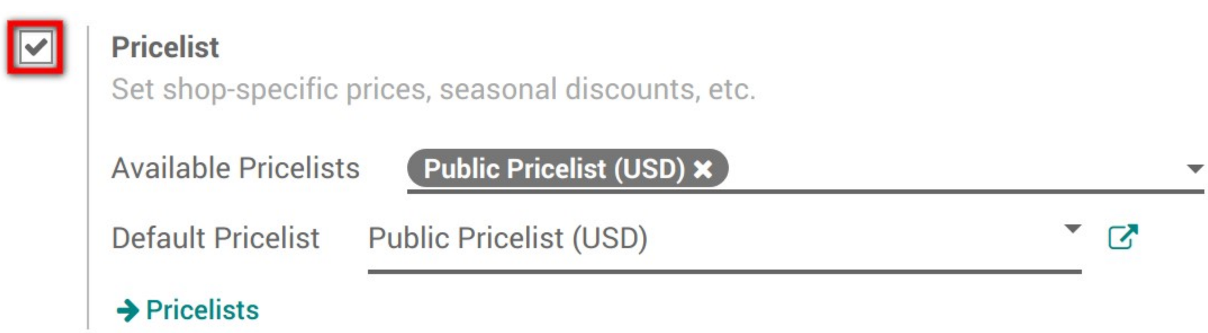


Note

On this example, there is a global discount of 50% as well as a specific 50% discount on oranges.

Apply time-limited discounts

To activate time-limited discounts, you must activate the *Pricelists* feature. To do so, go to **Point of Sales ‣ Configuration ‣ Point of Sale** and open your PoS. Then, enable the pricelist feature.

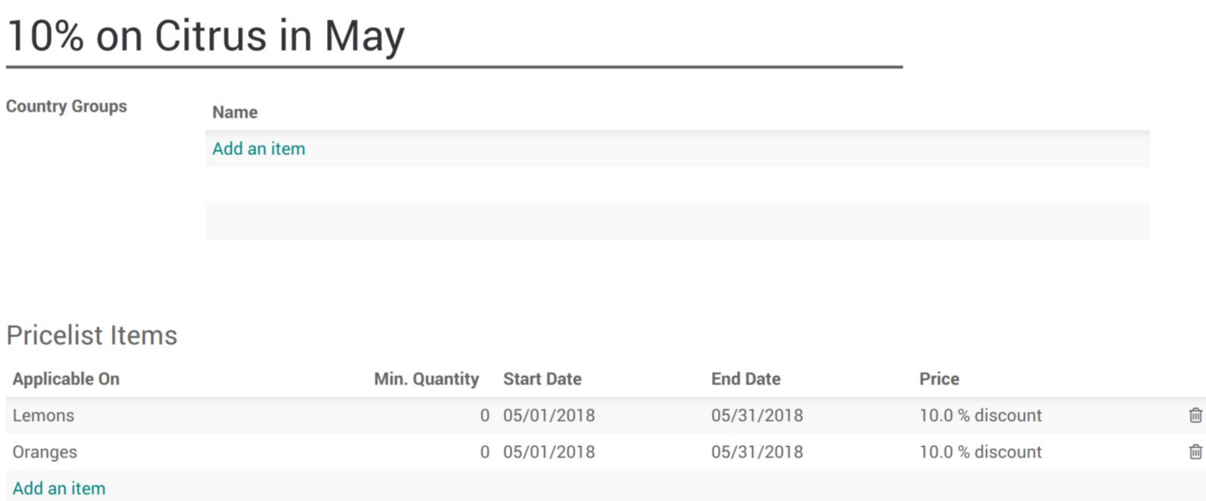


Once activated, you must choose the pricelists you want to make available in the PoS and define a default one.

Create a pricelist

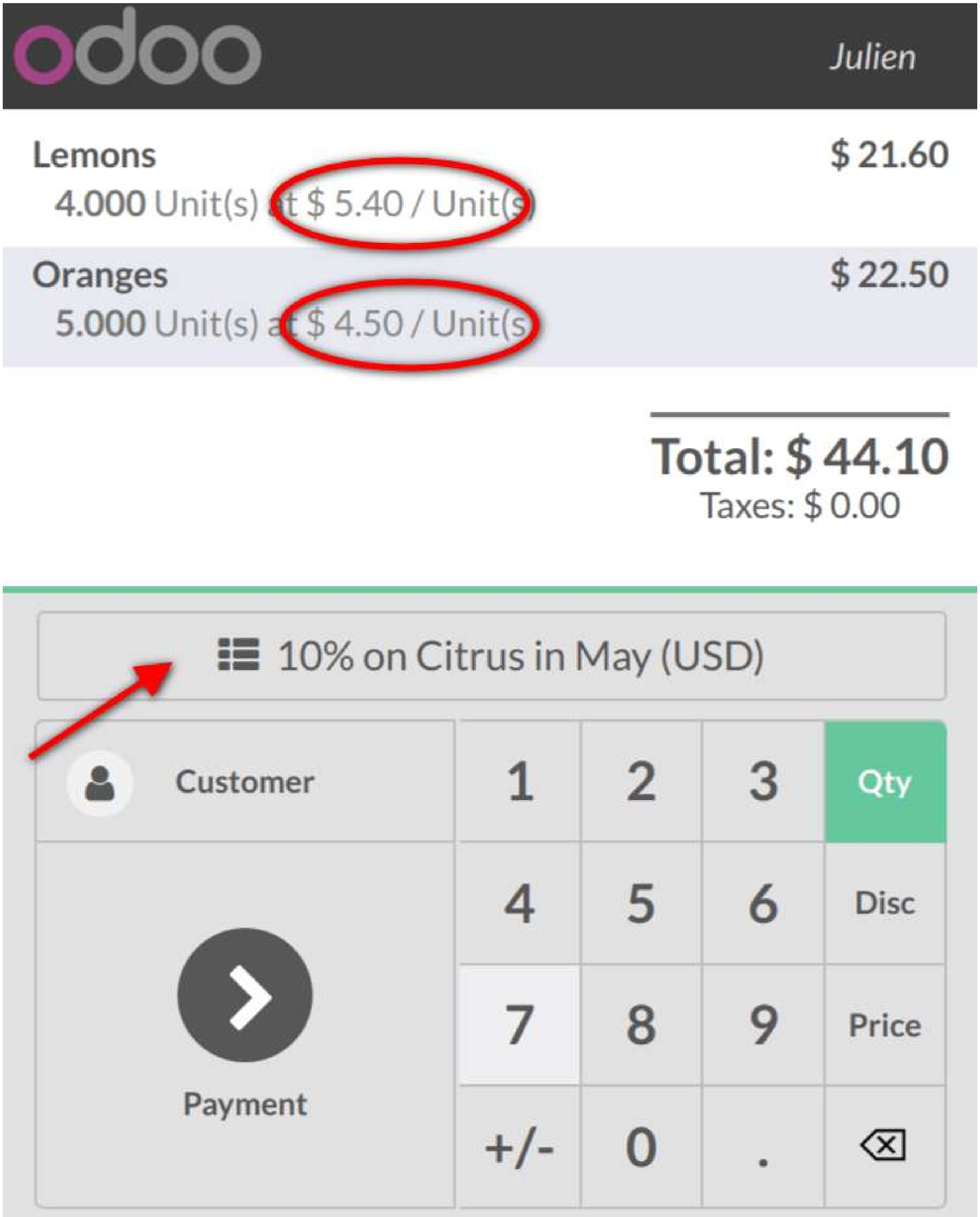
By default, Odoo has a *Public Pricelist* configured. To create more, go to **Point of Sale ▸ Products ▸ Pricelists**. Then click on create.

When creating a pricelist, you can set several criteria to use a specific price: period, min. quantity, etc. You can also decide to apply that pricelist on specific products or on the whole range.



Using a pricelist with the PoS interface

On the PoS interface, a new button appears. Use it to select a pricelist.



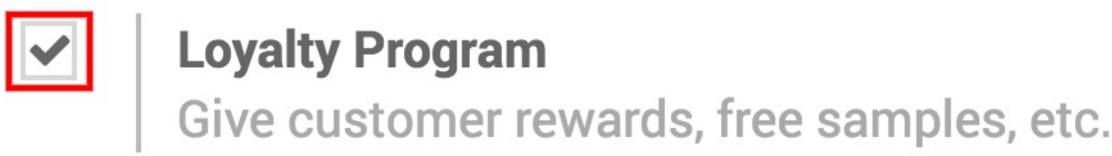
Click on it to instantly update the prices with the selected pricelist. Then, you can finalize the order.

Manage a loyalty program

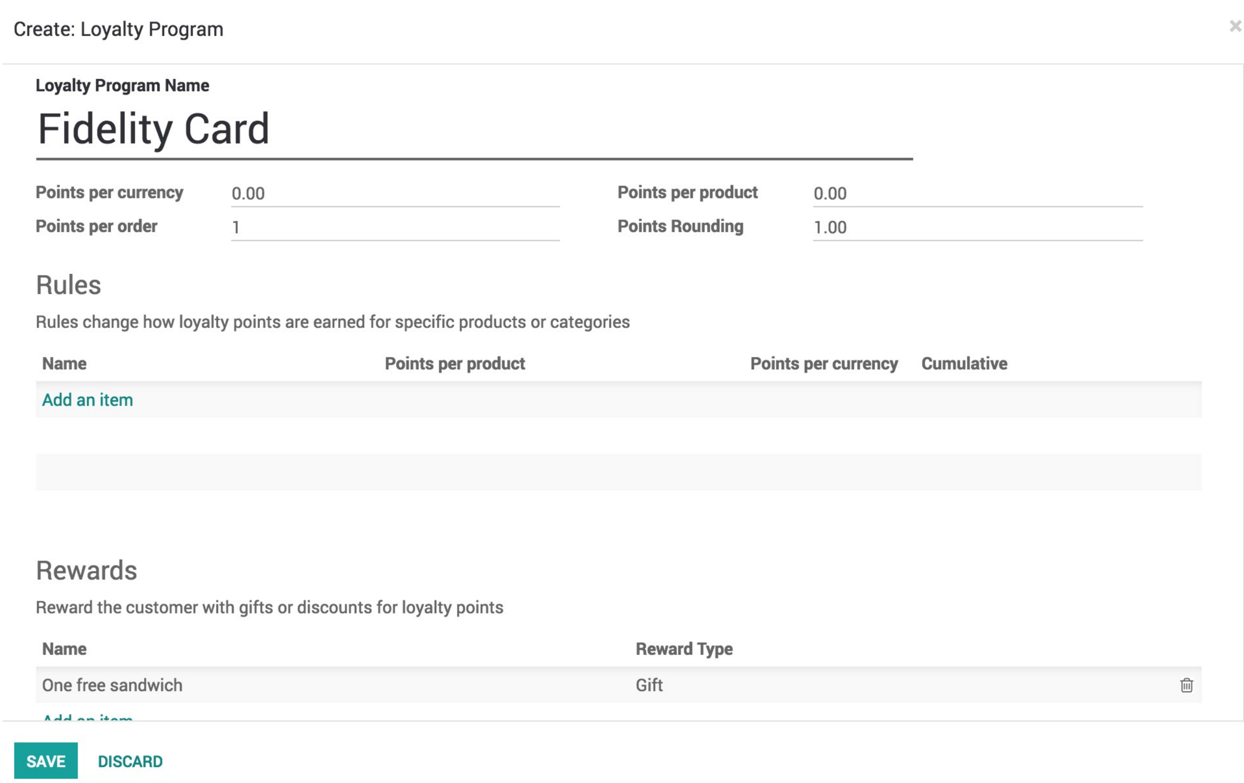
Encourage your customers to continue to shop at your point of sale with a *Loyalty Program*.

Configuration

To activate the *Loyalty Program* feature, go to **Point of Sale ‣ Configuration ‣ Point of sale** and select your PoS interface. Under the Pricing features, select *Loyalty Program*



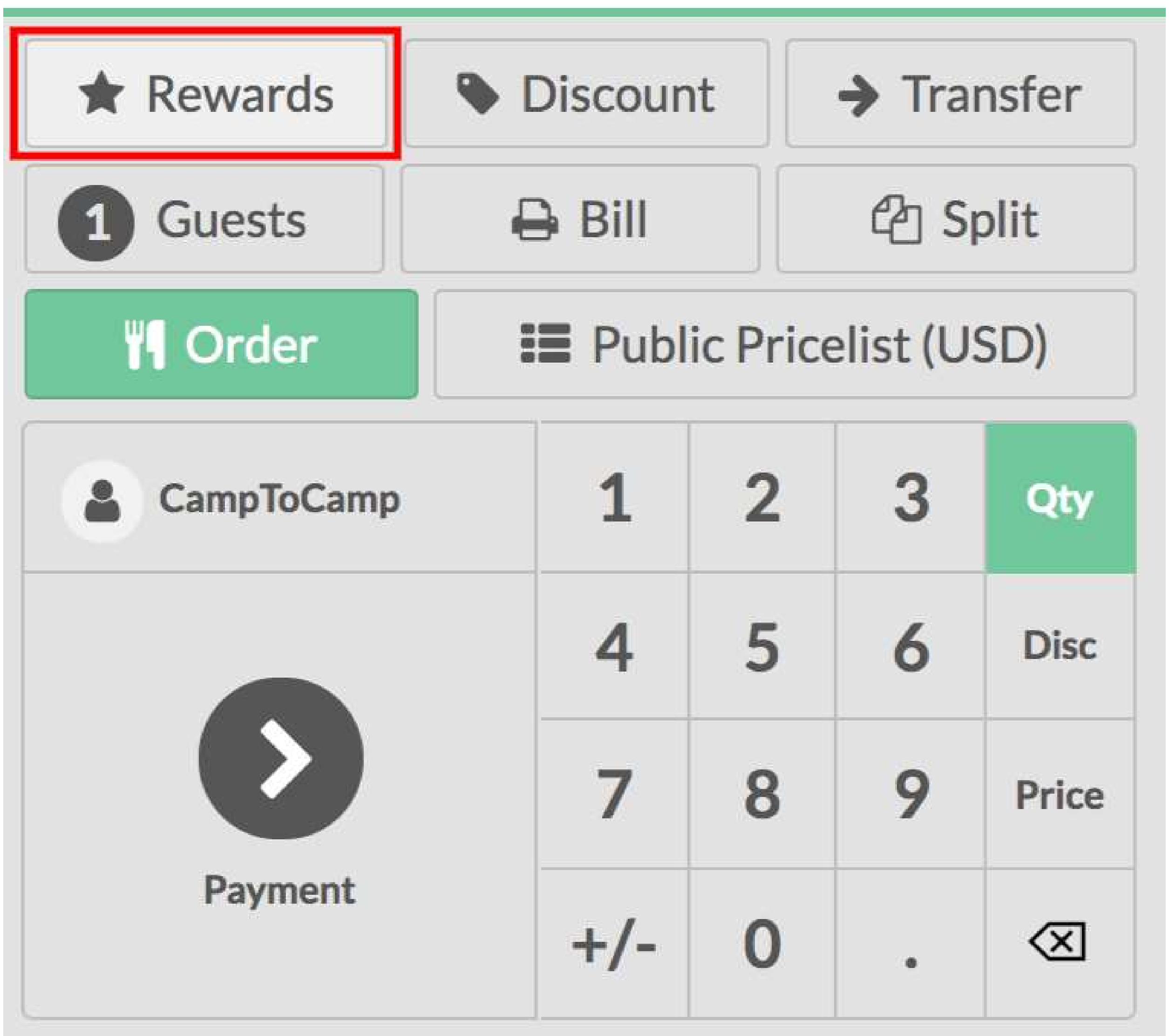
From there you can create and edit your loyalty programs.



You can decide what type of program you wish to use, if the reward is a discount or a gift, make it specific to some products or cover your whole range. Apply rules so that it is only valid in specific situation and everything in between.

Use the loyalty program in your PoS interface

When a customer is set, you will now see the points they will get for the transaction and they will accumulate until they are spent. They are spent using the button *Rewards* when they have enough points according to the rules defined in the loyalty program.



You can see the price is instantly updated to reflect the pricelist. You can finalize the order in your usual way.

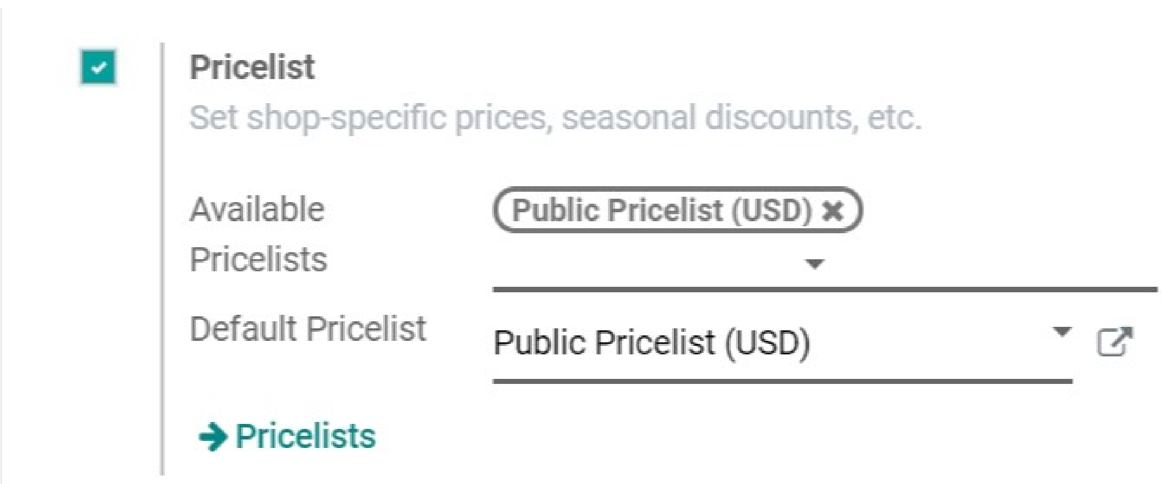
Using Pricelists in Point of Sale

You probably know the concept of happy hour: during a certain period of time, the barman gives a discount on some drinks (usually 50% off or a buy one get one free). When the period is over, prices go back to normal. But how does that relate with Odoo?

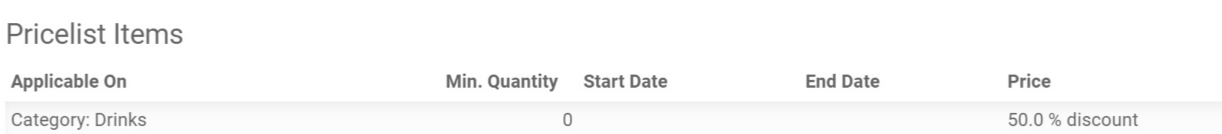
In Odoo, you can set up happy hours. It's one of the many possible uses of *Pricelists*. Those *Pricelists* allow the creation of multiple prices for the same product: a regular one and a special one for happy hours. Available in the *PoS* app, those are really convenient.

Set up Pricelists

To set up a *Pricelist*, go to **Point of Sale ‣ Configuration ‣ Configuration** and enable the *Pricelist* feature. Then, go to **Point of Sale ‣ Configuration ‣ Point of Sale** and enable *Pricelist* for the *PoS*.

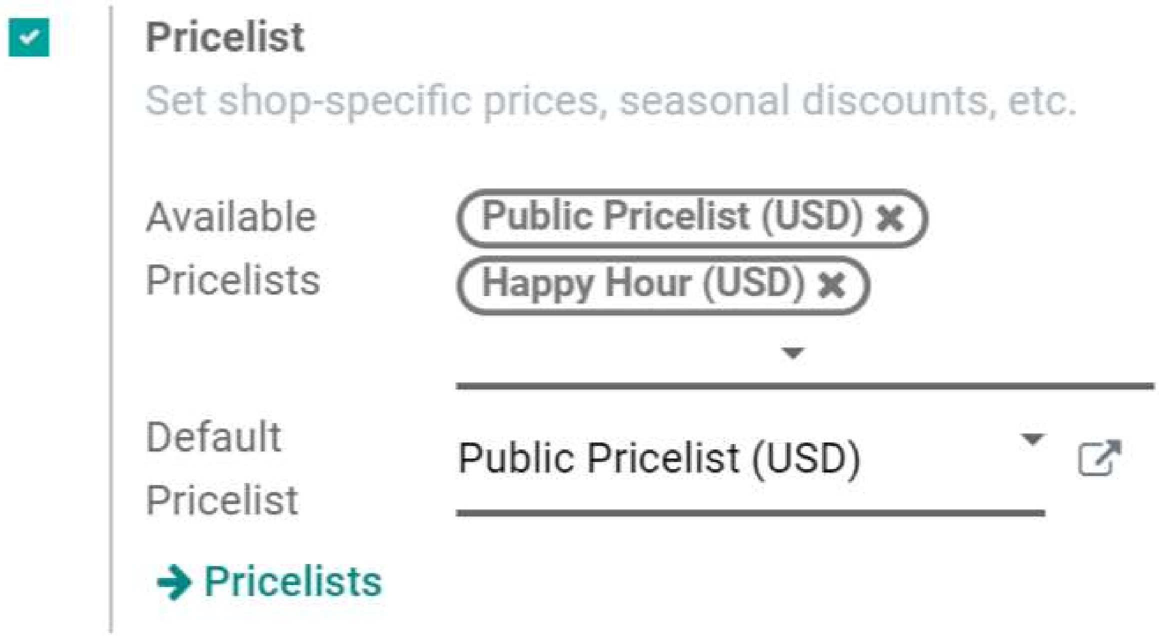


Now, you can create *Pricelists* by clicking on the *Pricelists* link. Then, set it up by choosing the product category you want to include in your happy hour and the discount.


Pricelist Items

Applicable On	Min. Quantity	Start Date	End Date	Price
Category: Drinks	0			50.0 % discount

Go back to your *PoS* settings and add the Happy Hour pricelist to the list. You can even choose a default pricelist if needed.



From now on, on the *PoS* interface, a new button is available, allowing you to choose among the different *pricelists* you added before.