A guide to

POINT OF SALE

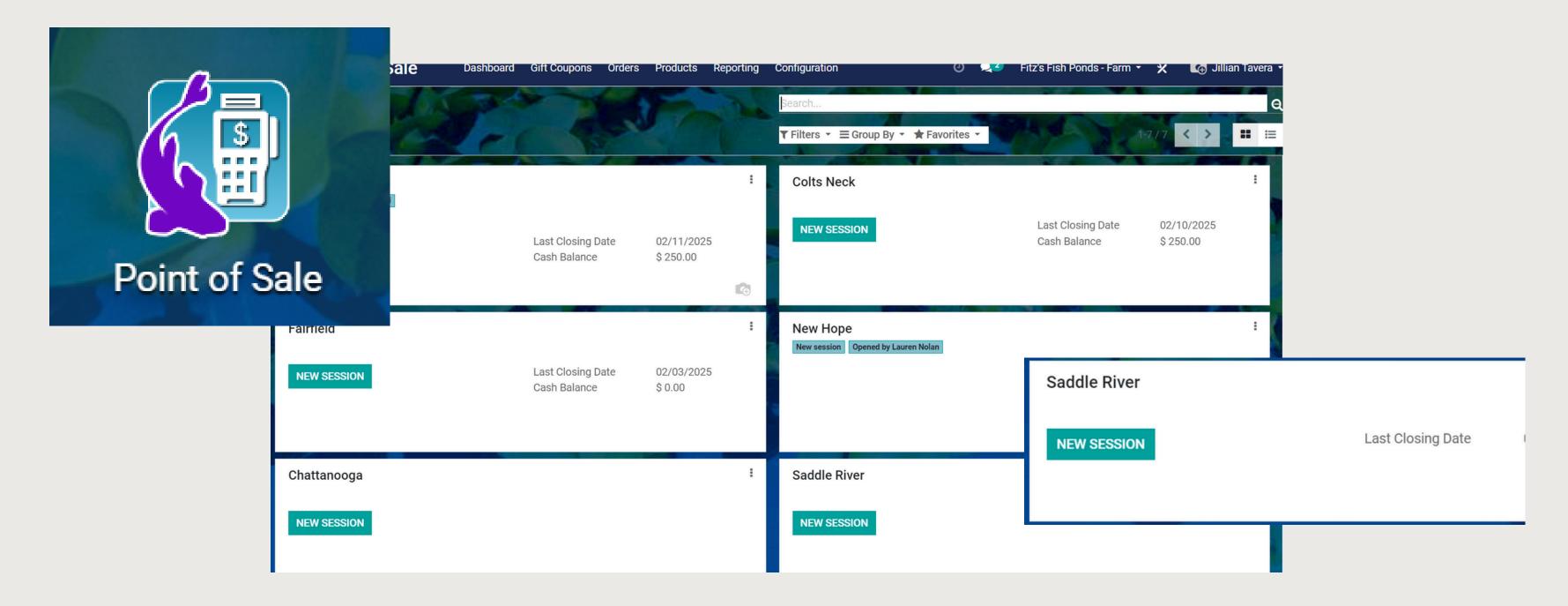


CONTENT

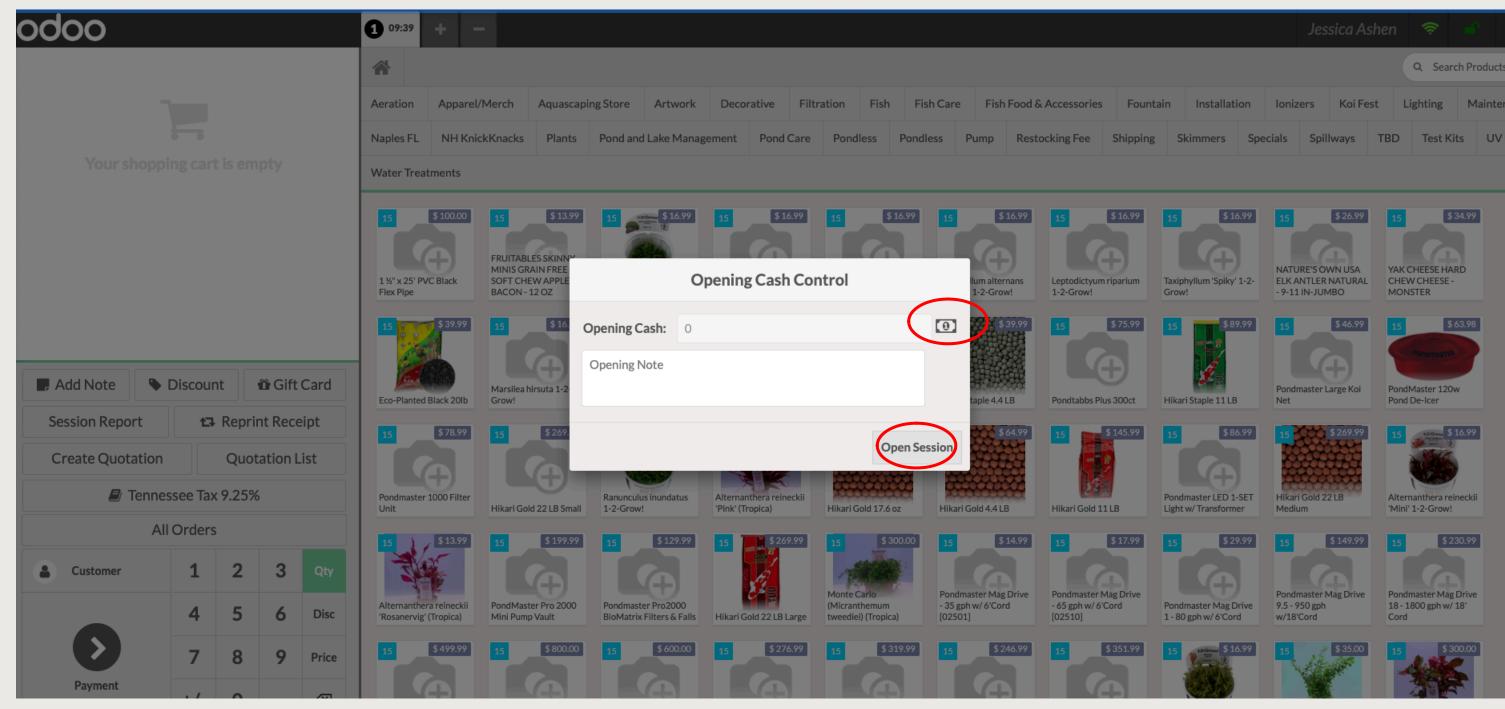
- 01: NAVIGATING THE POS MODULE
- 02: OPENING POS SESSION
- 03: UNDERSTANDING POS INTERFACE
- **04: MANUEL PAYMENT**
- 05: GIFT CARD PURCHASE & USE
- 06: CASH OUT & CLOSE

NAVIGATING THE POS MODULE

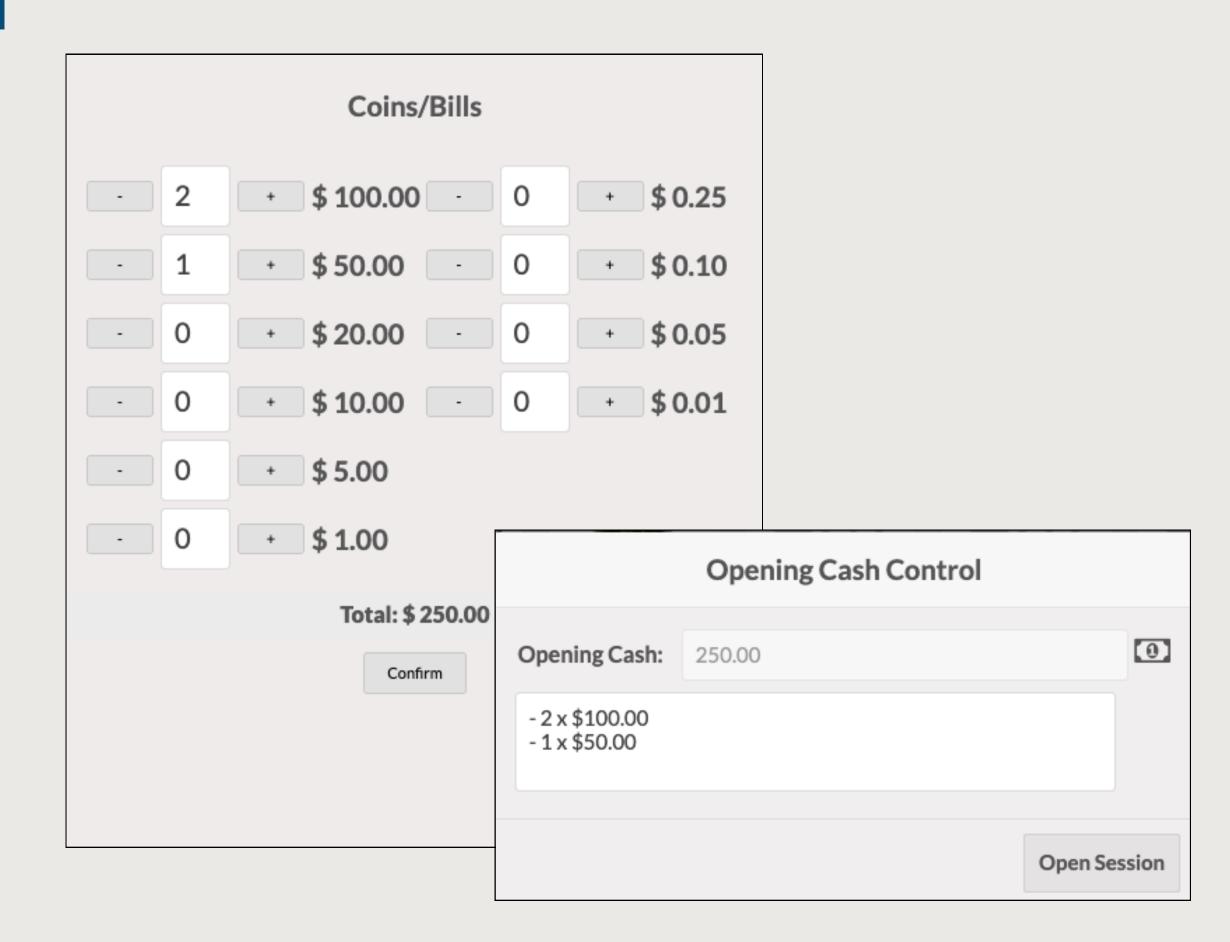
- Open Odoo.
- Go to the POS module.
- View the POS dashboard.
- Select your shop's POS station.
 sales session.
- Click 'New Session' to start a new sales session.

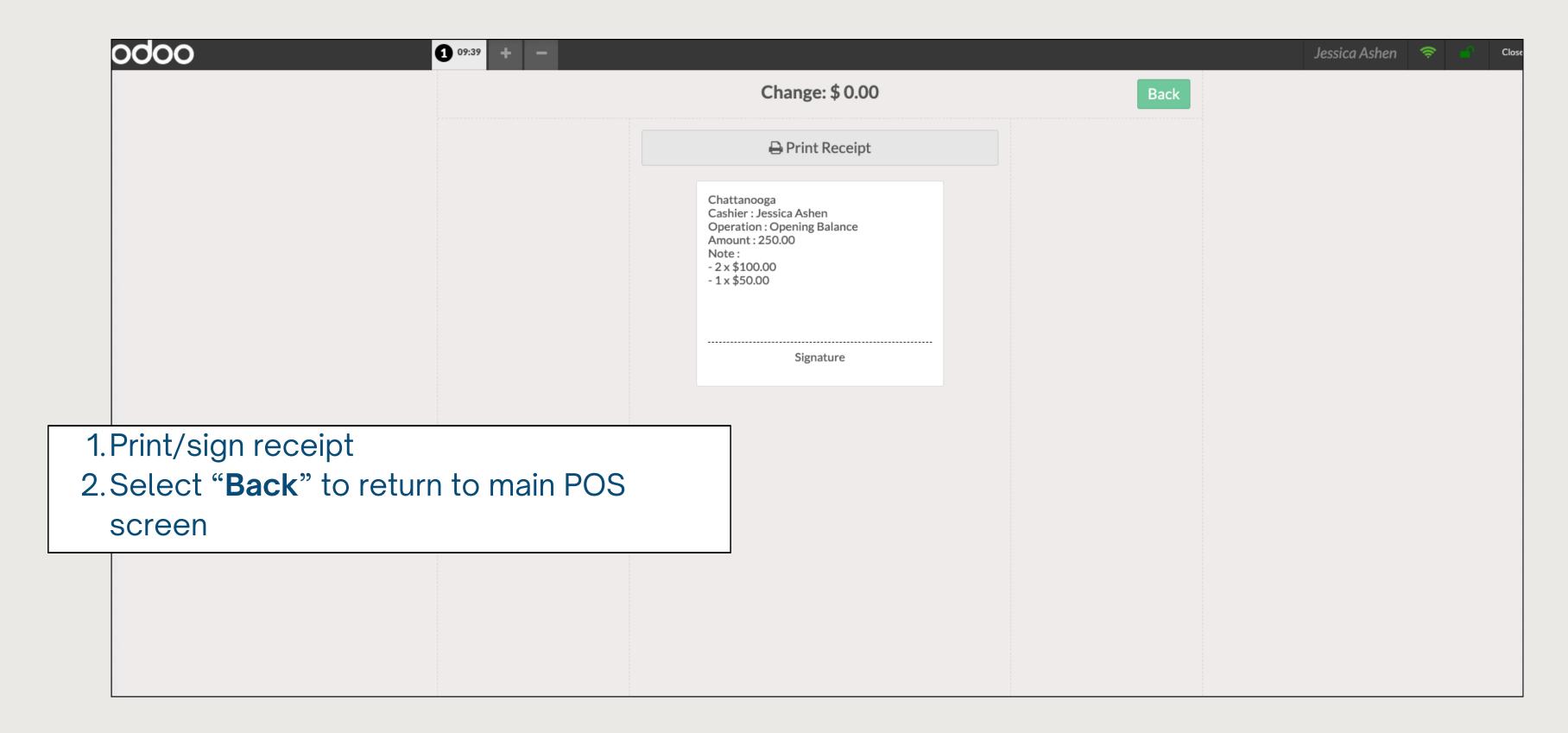


1. Select the "bill icon" followed by "Open Session" to count the drawer cash opening



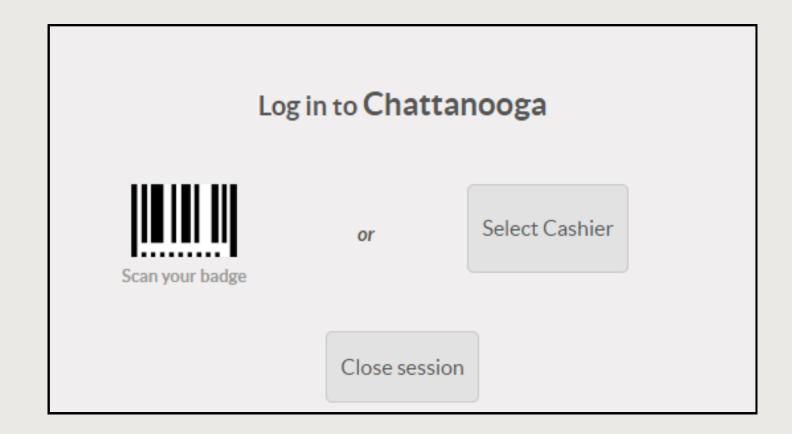
- 1. Either use the +/button or manually
 type the quantity of
 each bill/coin
- 2. Select "Confirm"
- 3. Select "Open Session"

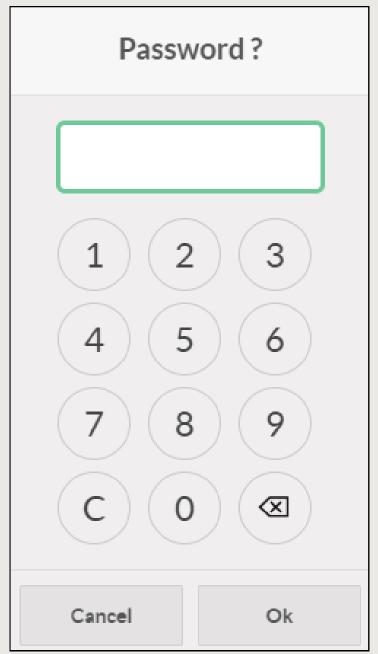




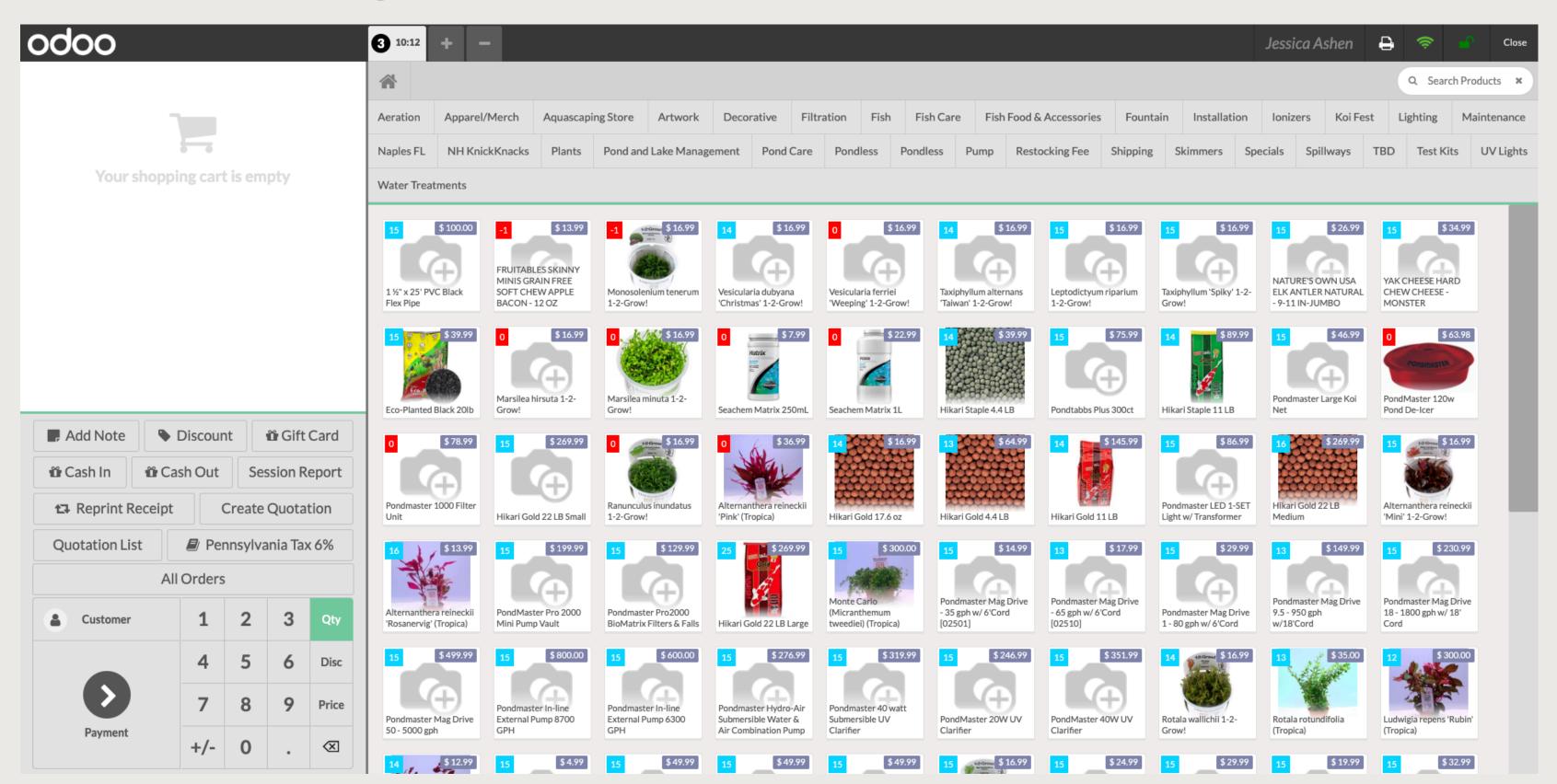
Login into POS

- 1. Select your cashier profile.
- 2. Enter your login credentials to access the system.





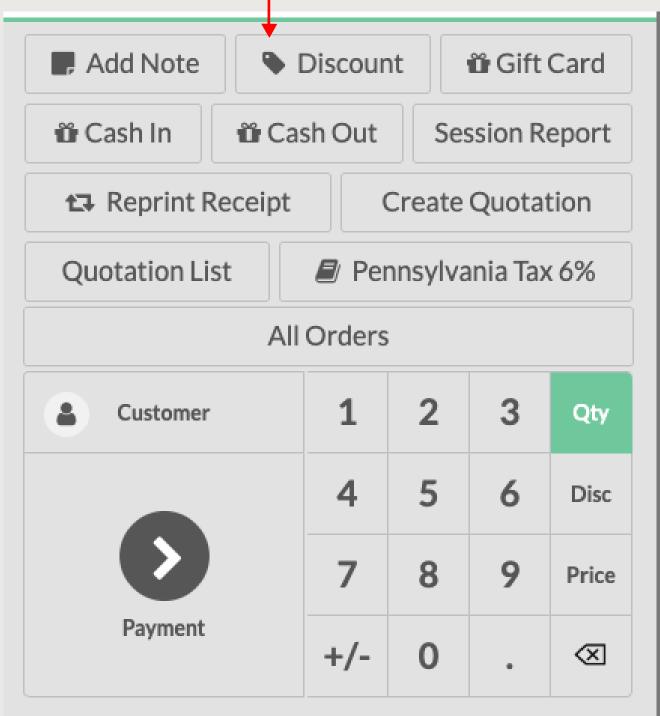
UNDERSTANDING THE POSINTERFACE



UNDERSTANDING THE POSINTERFACE

- "Add Note" places a note under a product.
- "Discount" this is a transactional discount
- "Gift Card" is to create or use a gift card.
- "Cash In Out Statement" provides a list of all the money added and removed during a POS session.
- "Session Report" provides total of all transactions, payments, etc.
- "Reprint Receipt" will reprint the receipt.
- "Create Quotation" creates an estimate for someone without them purchasing a product(s).
- "Quotation List" is a list of quotations.
- "Tax" tax exempt can be selected.
- "All Orders" shows transaction list
- "Customer" attaches a customer to the transaction
- "Qty" to change the quantity of items being purchased
- "Disc" itemized discount
- "Price" to override the price
- Delete/clear functionality

ENTIRE ORDER DISCOUNT



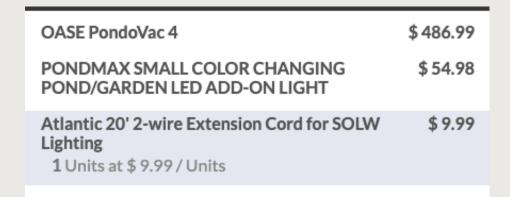
INDIVIDUAL ITEM DISCOUNT

POS QTY/PRICE CHANGE

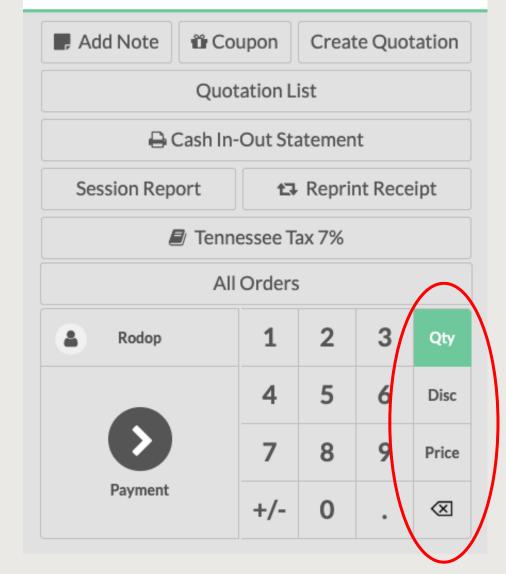
Adding Products to the Cart

- Click on a product or scan to select it.
- Click "Qty" to change quantity.
- "Disc" is for line item discount
- Click "Price" to change price.
- To remove a product, select the backspace twice.
- Assign a customer (if applicable).
- Click "Payment" to seed.

1	2	3	Qty
4	5	6	Disc
7	8	9	Price
+/-	0	•	Ø



Total: \$ 584.88 Taxes: \$ 32.92

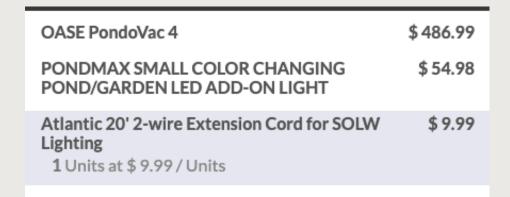


POS QTY/PRICE CHANGE

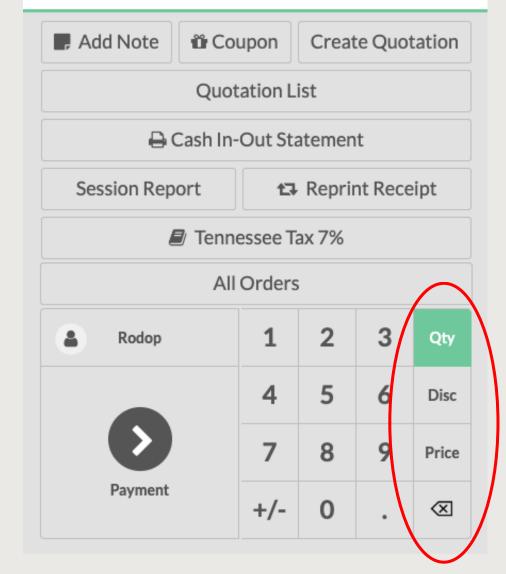
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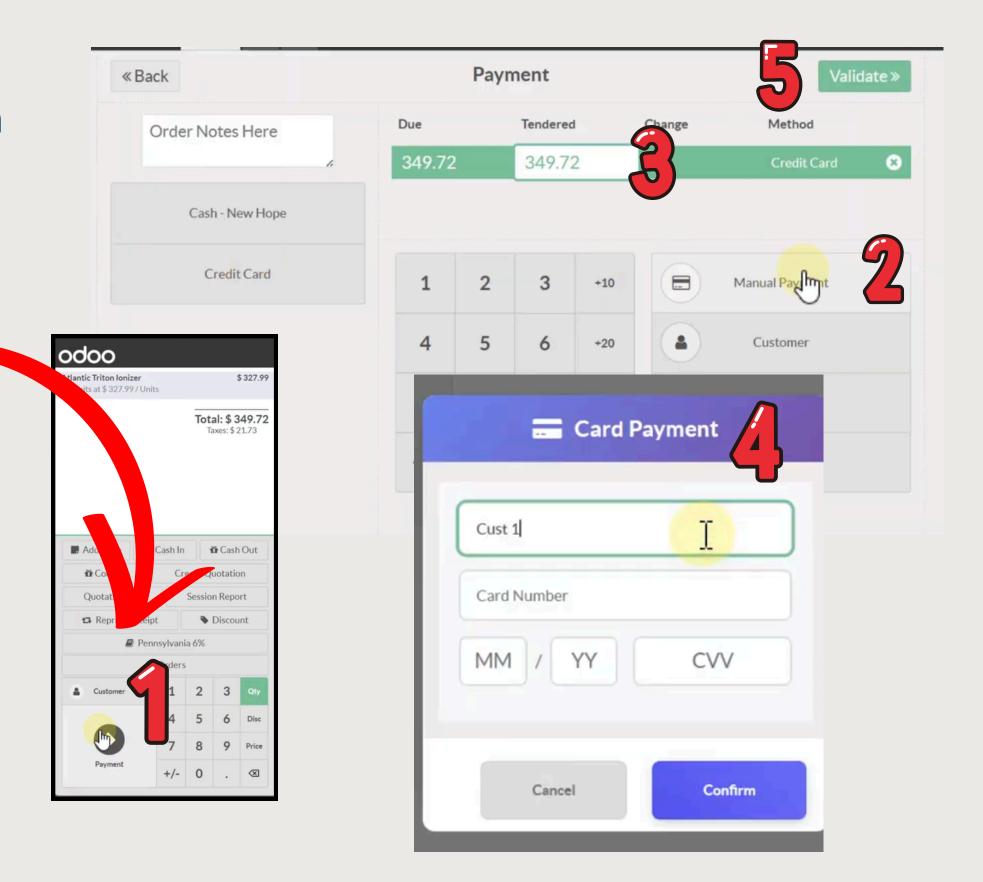
Total: \$ 584.88 Taxes: \$ 32.92



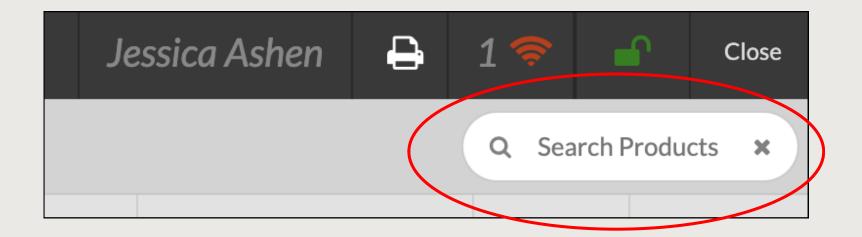
MANUAL PAYMENT

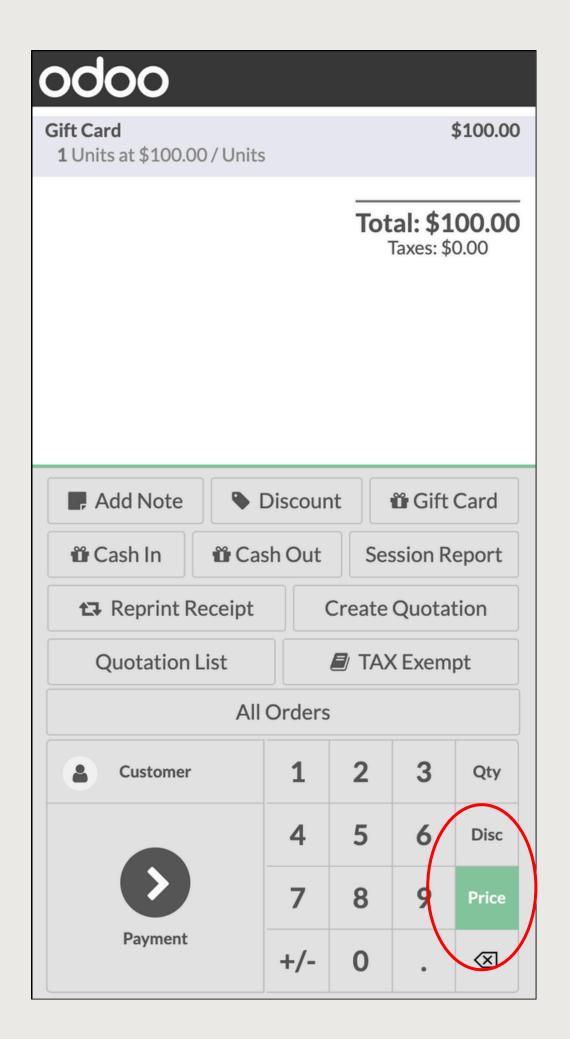
When to use Manual Payment

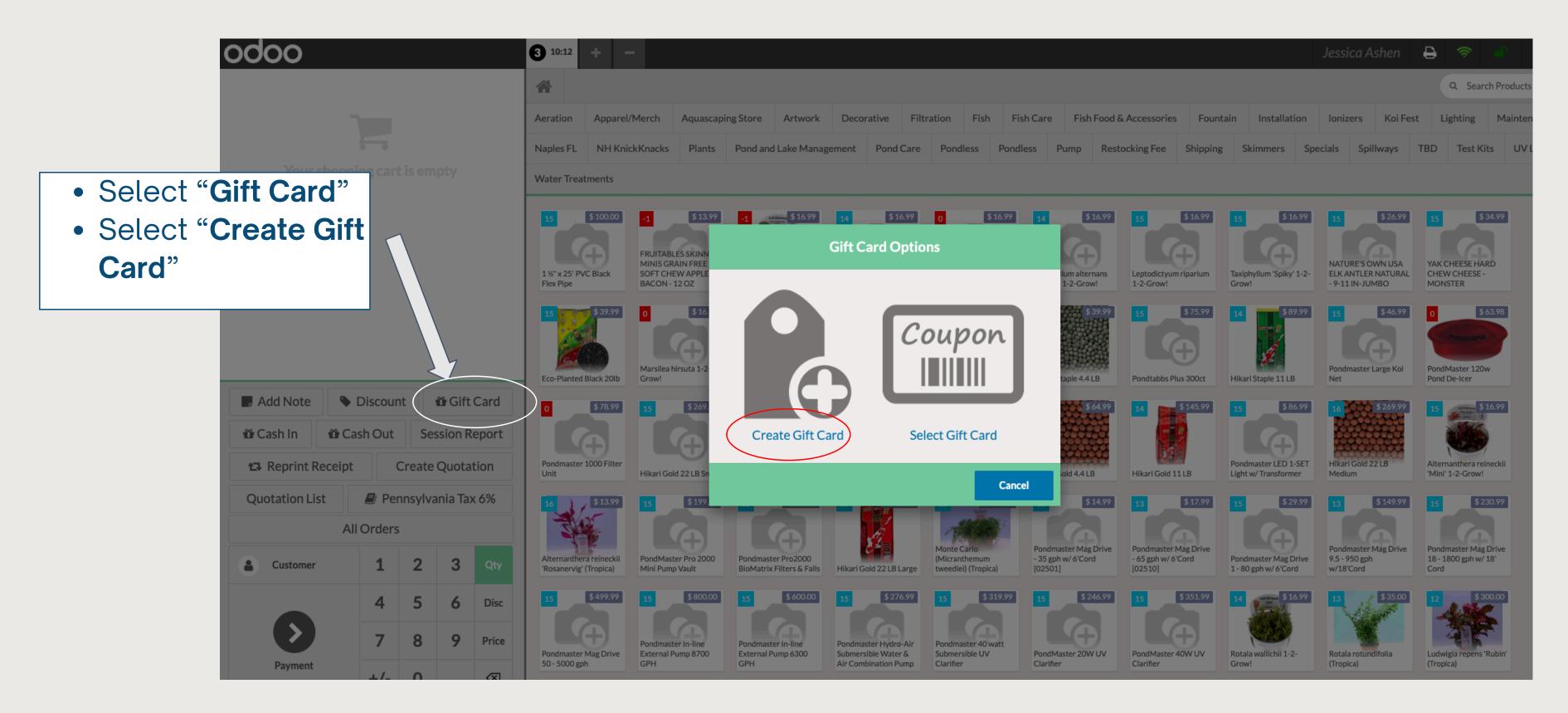
- When credit card terminal is down
- For cash/check transactions
- Special scenarios (e.g., invoice override)
- 1. Click "Payment"
- 2. Choose "Manual" from payment options
- 3. Enter paid amount
- 4. Add optional notes (e.g., check #, invoice #)
- 5. Click "Validate" or "Confirm Payment"



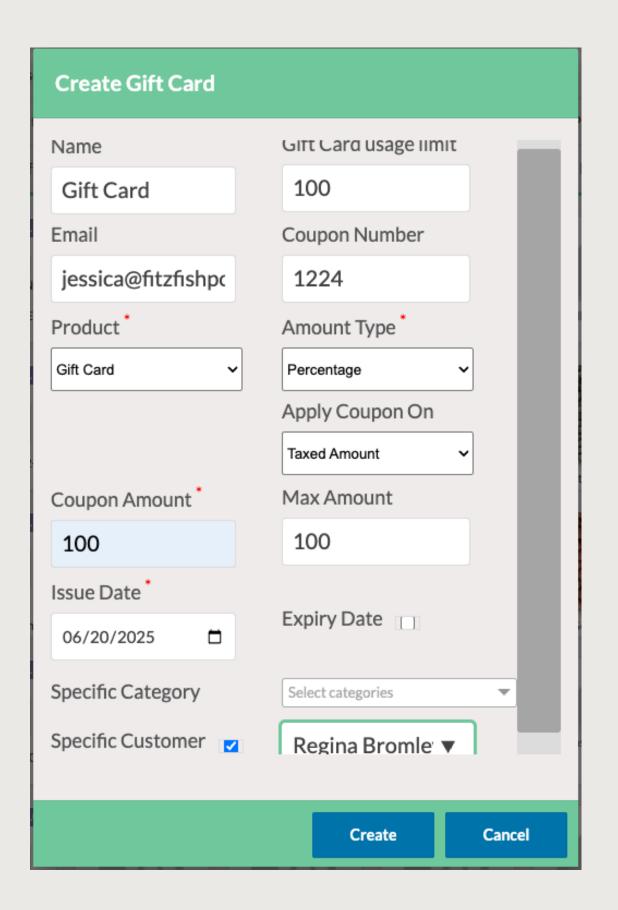
- 1. Search "Gift Card" in "Search Products" on top right corner.
- 2. Select "**Price**" to change the dollar amount being issued.







- Name is the title of the gift card, which will show on the print out
- Gift Card usage limit number of times the user can use the card until the balance reaches zero.
- Email the buyer's email
- Coupon Number scan the gift card being issued
- Product Select "Gift Card"
- Amount Type Percentage
- Apply Coupon On Taxed Amount
- Coupon Amount- amount of gift card
- Max Amount Same as amount of gift card
- Add expiry date if needed
- Issue date the date the gift card is sold
- No category needs to be selected
- Select customer you'd like to apply this to



The gift card can be **printed**, however, it will **also be attached to the buyer** and **recipient account** for reference.

Print Coupon

Gift coupon

Fitz's Fish Ponds - Retail Phone: User: Jessica Ashen Email:



Name: Free text field

Issue date: 2025-02-25

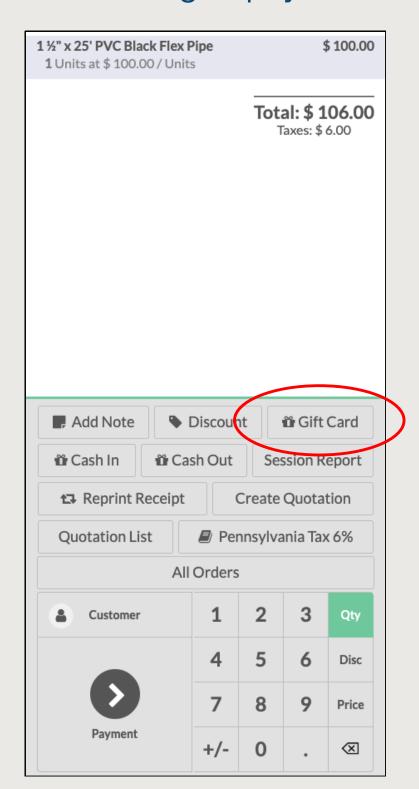
Amount: 100 Fixed

Coupon Number: 3119480239099

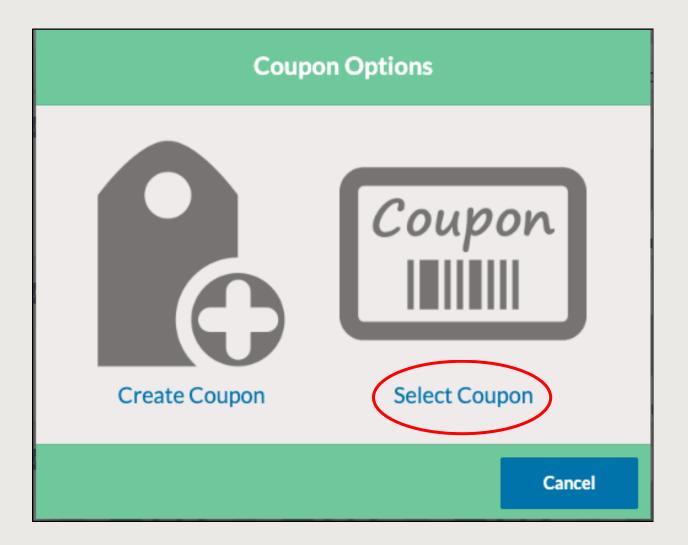
POS REDEEM GIFT CARD

A customer must be attached to this sale to utilize a gift card.

1. Select "Gift Card" to redeem before moving to payment screen.

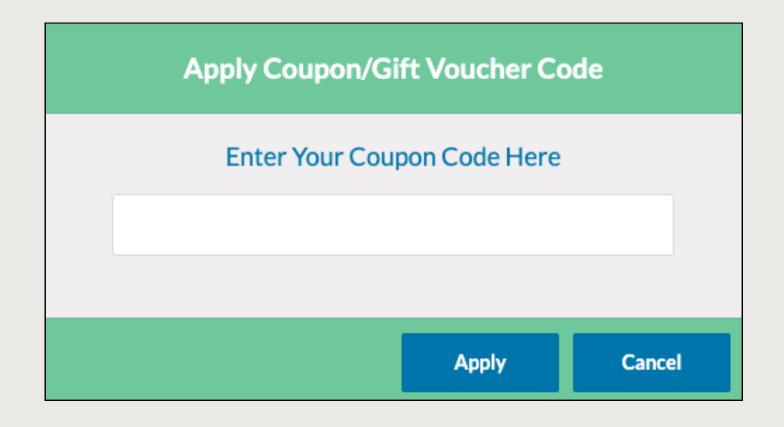


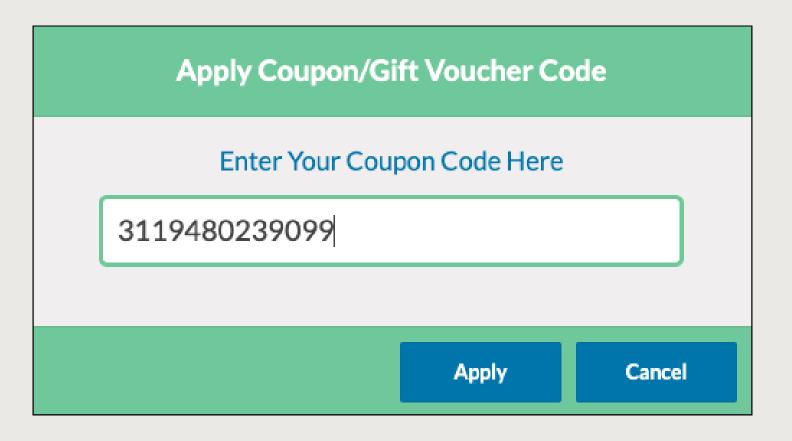
2. Choose "Select Coupon"



POS REDEEM GIFT CARD

3. Type or scan the coupon code and select "Apply"

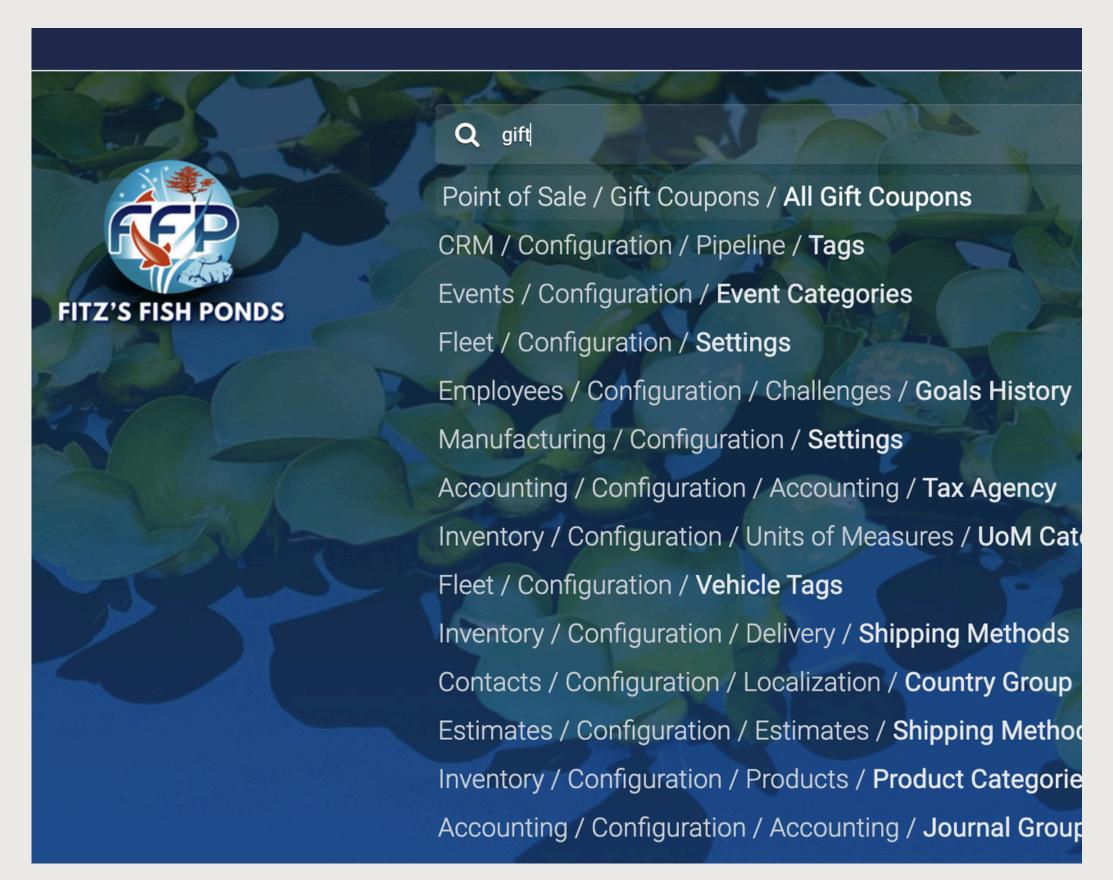




POS - LOOK UP GIFT CARD

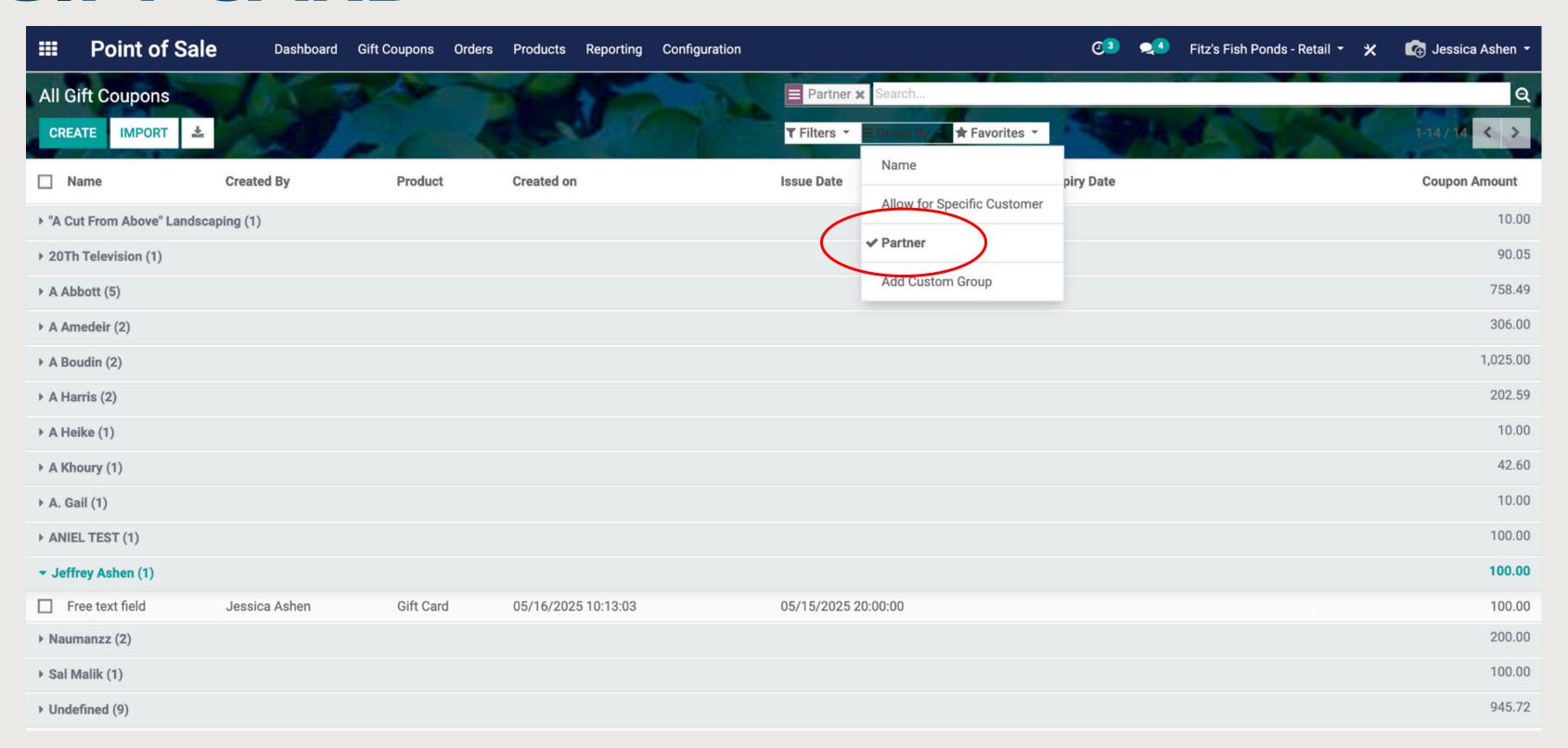
To look up a gift card:

Navigate to the Dashboard, search "Gift" and select option "All Gift Coupons"



POS - LOOK UP GIFT CARD

To filter the data, select "Group By" -> "Partner" and this will show the customer name



POS - LOOK UP GIFT CARD

Select the line item, on the next screen you will see the "Barcode"

Name Free text field

Product Gift Card

Coupon Barcode

9533201014715

Issue Date

05/15/2025 20:00:00

Expiry Date.

Allow for Specific

~

Customer

Partner

Jeffrey Ashen

POS - SESSION REPORTS

Session Reports downloads as a pdf, which can be printed.

- 1. From POS screen, select 'Session Report' to access sales details.
- 2. Download reports for review.

Includes:

- Salesperson details
- Opening balance
- Gross sales
- Discounts applied
- Payment breakdown

Session Report

Session Report



Fitz's Fish Ponds - Farm

610 Little York Mt Pleasant Rd Milford New Jersey United States Tel: 908-420-9908 Email: sales@fitzfishponds.com

Website: http://fitzfishponds.com

REPORT ON 2025-05-28 18:33:42 Sales Person Jessica Ashen POS/00115 Session Opened Date 2025-05-28 18:16:55 2025-05-28 18:24:46 Closed Date Closing Control Session Status **Opening Balance** \$ 300.00 Closing Balance \$ 300.00 Difference \$ 0.00 **Gross Sales** \$ 127.95 \$ 0.00 Discount Amount Total \$ 127.95

Categories Wise Sales

Category	Quantities
Flex Pipe	1.0

Total Items	1.0

Pricelist details

Pricelist	Quantity	Rising
Fitz's Fish Ponds - Retail	1	\$ 127.95
Total	1	\$ 127.95

Payment details

Payment details

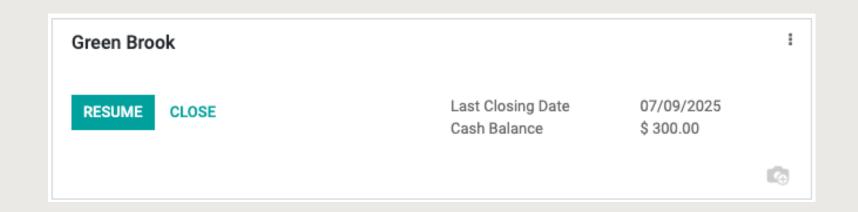
Method Cash - Saddle River	Rising \$ 127.95
Total	\$ 127.95

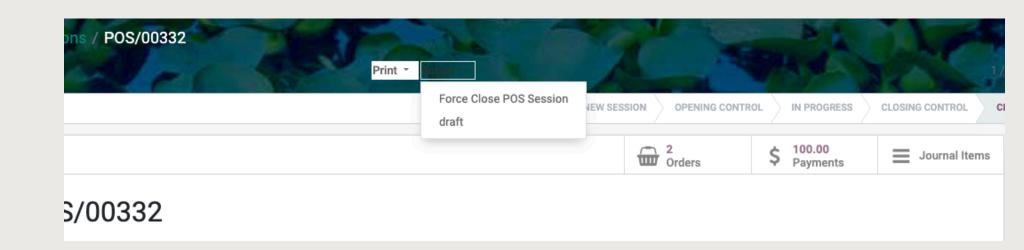
2

POS - FORCE CLOSE

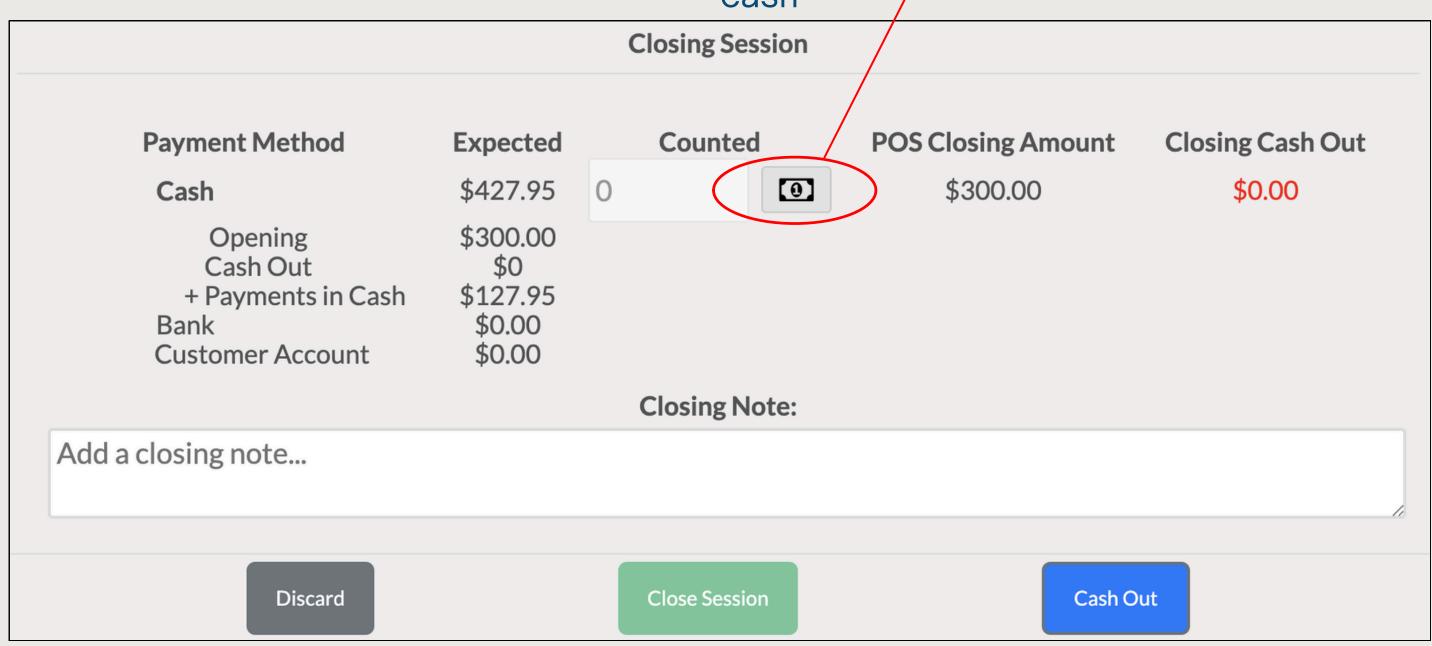
If you need to force close the register:

- 1. Select the three dots on the top right of your store
- 2. Select "Sessions"
- 3. Select the current open/in progress session
- 4. Select "End of Session"
- 5. Set closing cash; also enter cash in/out if you had cash sales throughout the day
- 6. Select "Action" → "Draft"
- 7. Select "End of Session"
- 8. Select "Validate closing & post entries"
- 9. Select "Confirm"
- 10. If you are unable to finish here, go back to "Action" and select "Force Close POS Session"

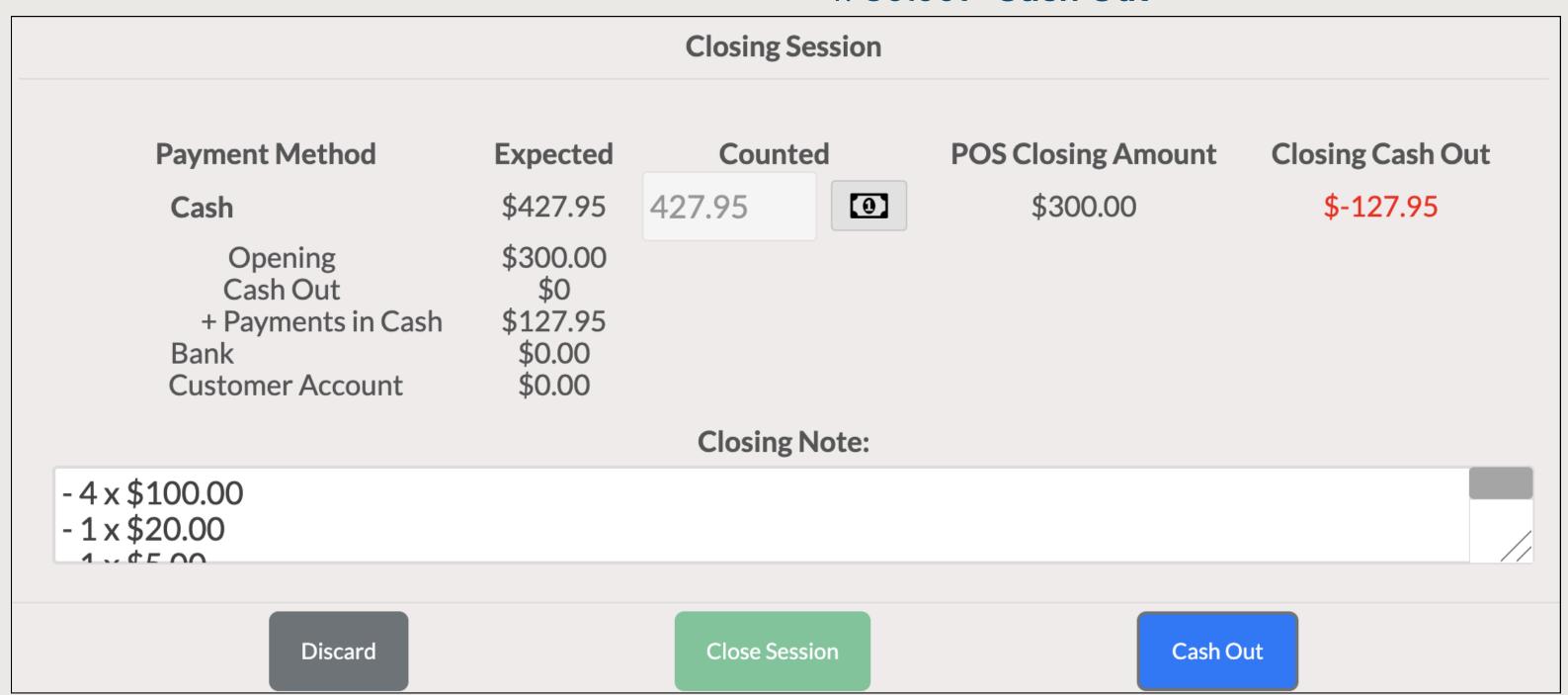




- 1. Click 'Close' on the top right, to end the session. The screen below pops up with a total daily summary
- 2. Select the icon to count the register closing cash

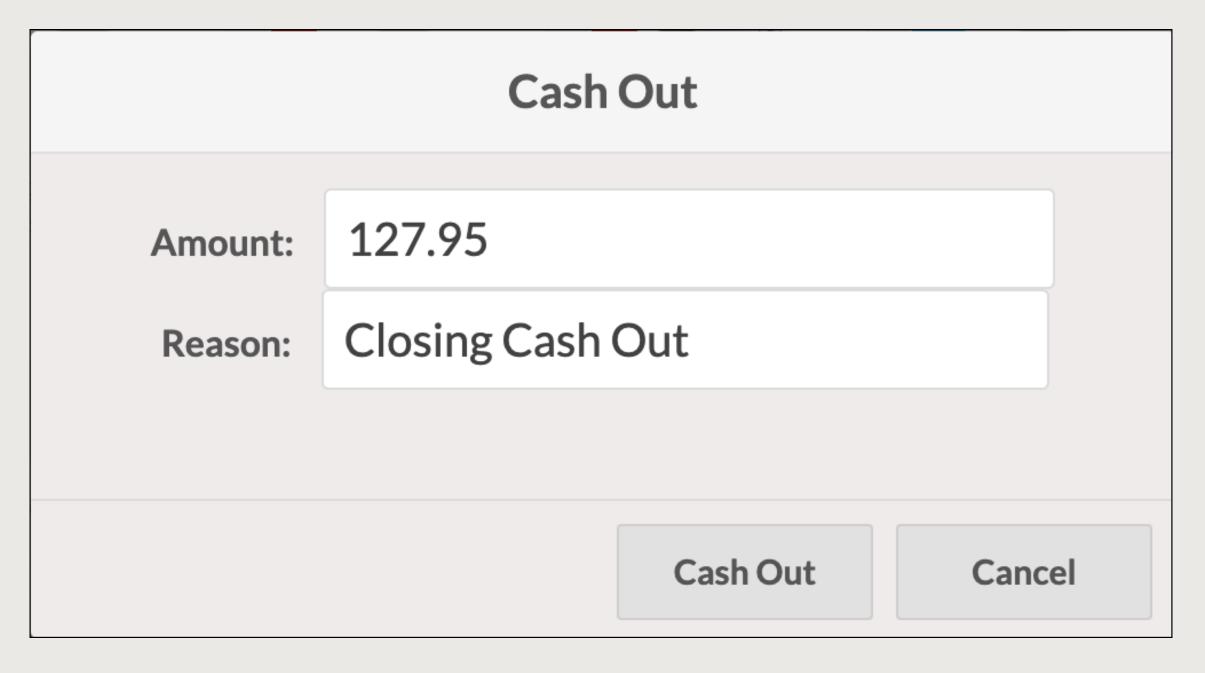


- 3. After counting the total cash, ensure the "Closing Cash Out" matches the "Payments in Cash"
- 4. Select "Cash Out"

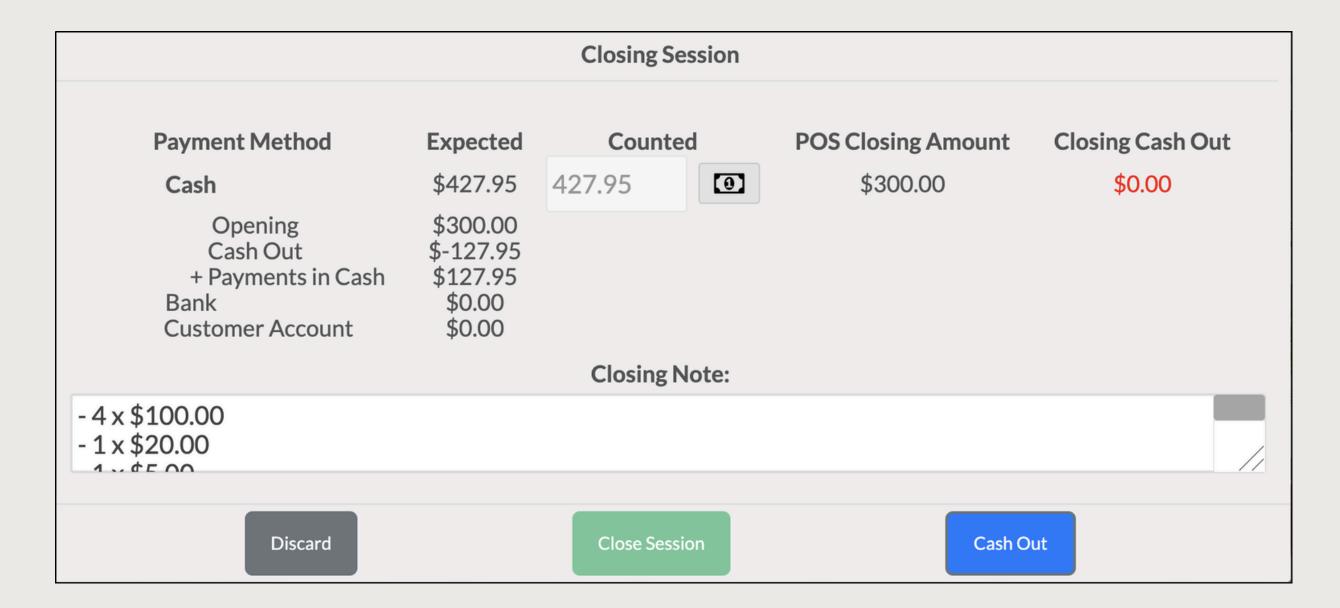


5. The pop up box appears with the total cash to remove from the register and defaults with the note "Closing Cash Out".

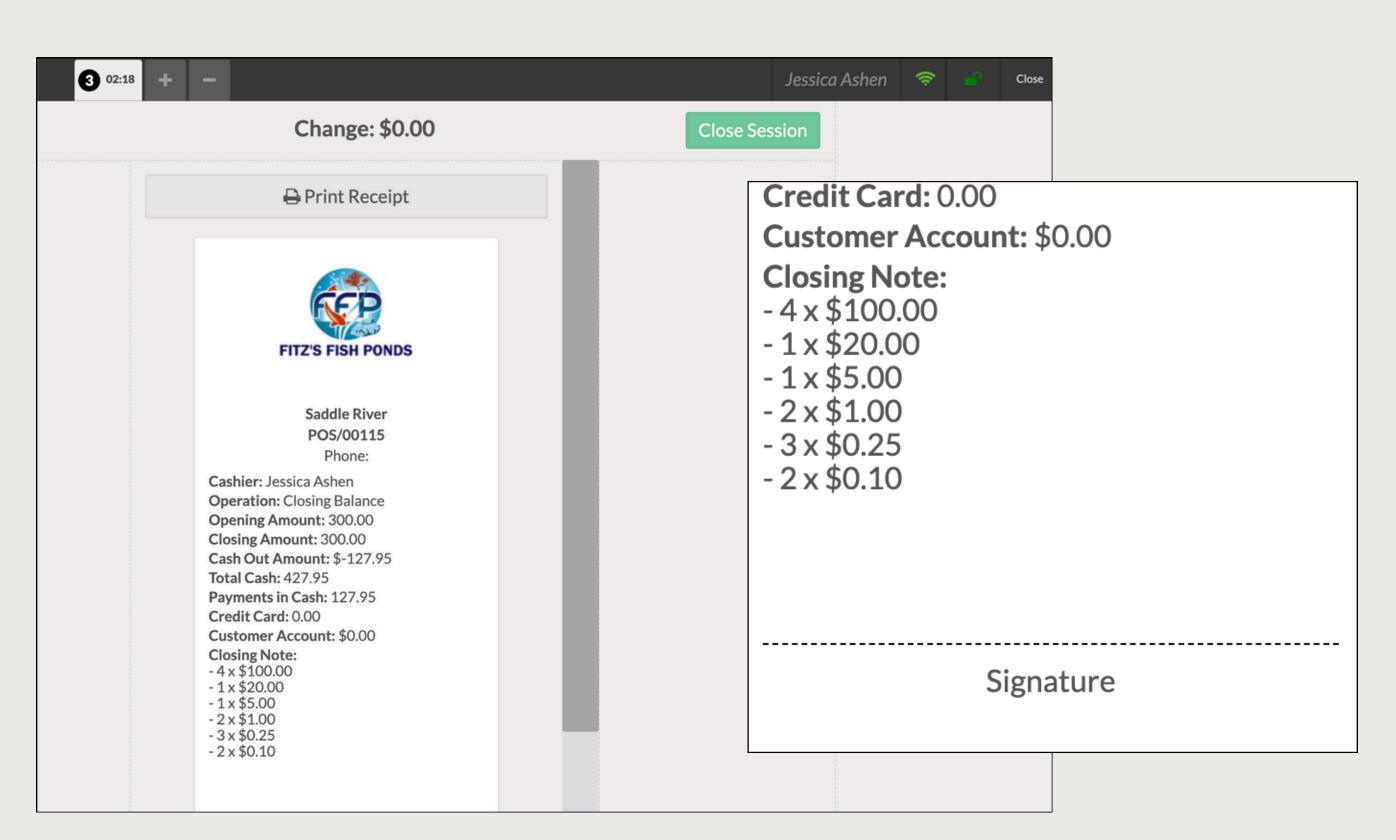
Select "Cash Out".



6. Closing Cash Out is now Zero Dollars, select "Close Session"



7. Select "Print Receipt", sign at bottom, and select "Close Session"



CONTACT INFORMATION

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- jessica@fitzfishponds.com

