

# Easy POS Dashboard User Manual

All-in-one Point of Sale analytics, KPIs and reports for Odoo.

**Module:** Easy POS Dashboard

**Technical module name:** easy\_pos\_dashboard

**Odoo version:** 15 - 19 (Community & Enterprise)

**Prepared for:** POS managers, cashiers, retail analysts and owners

**Document date:** 2026-07-20

## 1. What the module does

Easy POS Dashboard gives POS managers, cashiers, retail analysts and owners a single-screen, real-time overview of Point of Sale operations — sales, sessions, cash, refunds, stock alerts, cashier performance and shop activity — plus a complete reporting suite where every report can be previewed on screen and downloaded as **PDF** or **Excel (XLSX)**.

It reads existing POS data through the standard Odoo ORM. It does **not** modify Odoo core, and it works with multi-shop, multi-session and multi-company setups.

## 2. Access & security

The dashboard and its reports respect standard Odoo POS security groups:

| Group                   | Access                                                                 |
|-------------------------|------------------------------------------------------------------------|
| Point of Sale / User    | View the dashboard, KPIs, charts and reports for shops they can access |
| Point of Sale / Manager | Full dashboard access, all shops/sessions, dashboard settings          |

The Tax Report additionally requires accounting rights. All data is scoped by the current user's company and record rules — nothing bypasses standard Odoo access control.

## 3. Opening the dashboard

Go to **Point of Sale → Reporting → Easy POS Dashboard** (or the dashboard entry under the Point of Sale app menu). The dashboard loads with the default period (Today) and all shops the current user can access.

## 4. Filters

A filter bar at the top of the dashboard controls the scope of every KPI, chart, table and alert on the page:

- **Company** — for multi-company databases.
- **Shop** — one, several, or all POS configurations ( `pos.config` ).
- **Session** — restrict to a specific POS session.
- **Cashier** — restrict to a specific cashier/salesperson.
- **Period** — quick presets (Today, Yesterday, This Week, This Month, This Quarter, This Year, etc.) or a **custom date range**.

Changing any filter re-queries the whole dashboard in place — no page reload.

### Refresh

- **Manual refresh** — click the refresh icon to reload the current view.
- **Live auto-refresh** — enable auto-refresh every **1, 5 or 15 minutes**; a LIVE badge shows the dashboard is updating on its own. Useful for a POS manager's screen kept open during business hours.

## 5. KPI cards

- **Total sales, order count, gross margin, discounts, refunds, average order value, customers served.**
- **Open sessions, sessions closed, cash collected, card/bank collected, cash difference.**

Every KPI is scoped to the active filters and updates live with them. Click a KPI card to drill down into the underlying Odoo records (orders, sessions or payments).

## 6. Charts & trends

- **Gross sales vs. refunds** trend chart.
- **Sales by category**.
- **Payment method split**.
- **Average hourly sales** pattern.
- **Top products** (toggle between revenue and quantity).
- **Top cashiers**.
- **Order status** donut.

Click any chart bar, slice or point to open the matching filtered list of records in standard Odoo views.

## 7. Shop overview

A comparison table across POS configurations (shops), showing session status, sales totals, margin %, refund % and cash difference per shop — useful for owners and managers comparing performance across locations at a glance.

## 8. POS Alerts panel

A configurable panel that flags operational issues needing attention:

- Sessions open too long.
- Unclosed sessions from previous days.
- Cash differences beyond the configured threshold.
- High refund rate.
- Zero-price sales.
- Large discounts.
- Low/negative stock (when the Inventory app is installed).

Each alert is clickable and opens the underlying records so the issue can be investigated and resolved immediately.

## 9. Reports (View, PDF, XLSX)

Open **Point of Sale** → **Reporting** → **Easy POS Reports**. Pick a report, set the filters (shop, session, cashier, period), then choose:

- **View** — opens a filtered Odoo list/pivot view.
- **PDF** — a print-ready document; preview it in the browser before saving.
- **XLSX** — a spreadsheet download with the same underlying data as the PDF and the on-screen preview, so the three never disagree.

### Report catalog

| Report                    | Use it for                                             |
|---------------------------|--------------------------------------------------------|
| Daily Sales Summary       | End-of-day totals across shops                         |
| Session Report (Z-Report) | Per-session cash/card reconciliation                   |
| Sales by Product          | Product-level revenue and quantity                     |
| Sales by Category         | Category-level performance                             |
| Sales by Cashier          | Cashier performance comparison                         |
| Sales by Shop             | Multi-shop comparison                                  |
| Payment Method Report     | Cash/card/bank breakdown                               |
| Refund Report             | Refund volume and reasons                              |
| Discount Report           | Discount usage and impact                              |
| POS Tax Report            | Tax collected per period                               |
| Hourly Sales Report       | Peak-hour analysis                                     |
| Top/Slow Movers           | Best- and worst-selling products                       |
| Customer Sales Report     | Sales by customer                                      |
| Margin Report             | Gross margin by product/category/shop                  |
| Cash In/Out Report        | Cash movements during sessions                         |
| Inventory Snapshot        | Stock levels for POS products (requires Inventory app) |

## 10. Settings

**Point of Sale → Configuration → Settings → Easy POS Dashboard** (Manager access only):

- Alert thresholds (cash difference, refund rate, discount size, session duration, low-stock level).
- Default dashboard period.
- Auto-refresh behavior.

## 11. Multi-language

The interface ships with translations for English (source), Bangla, Arabic (RTL), Chinese, French, Spanish and German. Install additional languages under **Settings → Translations → Languages**; each user picks theirs in Preferences. The dashboard and PDF reports render correctly right-to-left when Arabic is selected.

## 12. Troubleshooting

| Symptom                                           | Cause & fix                                                                                                                       |
|---------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Dashboard shows no data                           | Check the active filters — Shop/Session/Period may be scoped too narrowly, or the user lacks access to any POS configuration      |
| Inventory Snapshot report / stock alerts missing  | The Inventory ( <code>stock</code> ) app is not installed — the dashboard degrades gracefully and simply omits these              |
| Tax Report is not accessible                      | The current user lacks accounting rights required for that specific report                                                        |
| Cash difference not showing for a shop            | The session may still be open — cash difference is computed on session close                                                      |
| Numbers differ slightly from a manual count       | Margin is derived from <code>price_subtotal - total_cost</code> at order-line level; verify product cost prices are set correctly |
| PDF/XLSX totals differ from the on-screen preview | They shouldn't — all three read from the same report dataset; refresh the dashboard and re-open the report if this is seen        |

*Easy POS Dashboard — manual last updated July 2026.*