

Gift Register

User Manual

ABC Home Center
Cashiers and branch staff

Version 2.0 · May 2026

1. Introduction

Gift Register is ABC Home Center's application for managing gift lists tied to special events (weddings, birthdays, baby showers, graduations, and many more). It replaces the previous order-based approach with an event-based model.

How does it work?

The person celebrating the event (the honoree) comes to the store and, with a cashier's help, walks through the showroom scanning the products they would like to receive as gifts. That list is saved in the system. Then, over the following days or weeks, the event's guests come to the store and buy products from that list. Each guest pays their share and takes their products.

The system tracks which products have been bought, how many are still pending, and automatically closes the event once every product on the list has been purchased.

What does this manual cover?

It walks you step by step through the two main tasks you will do as a cashier:

- Register a new event with its product list.
- Serve a guest who comes to buy from an existing event.

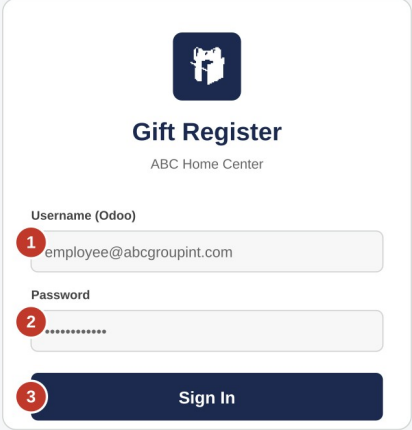
Each section includes screenshots with numbered steps. Follow them in order and you won't get lost.

Important

Before using the application, your supervisor must have given you your Odoo username and password. If you don't have them, contact the IT department.

2. Sign In

Open the browser on the assigned tablet, phone or computer and go to the Gift Register address your supervisor gave you. You will see the sign-in screen.



Sign-in screen

Steps

1. Type your Odoo username (usually your company email) in the Username field.
2. Type your password. If you want to see what you typed, press the eye icon.
3. Press the Sign In button.

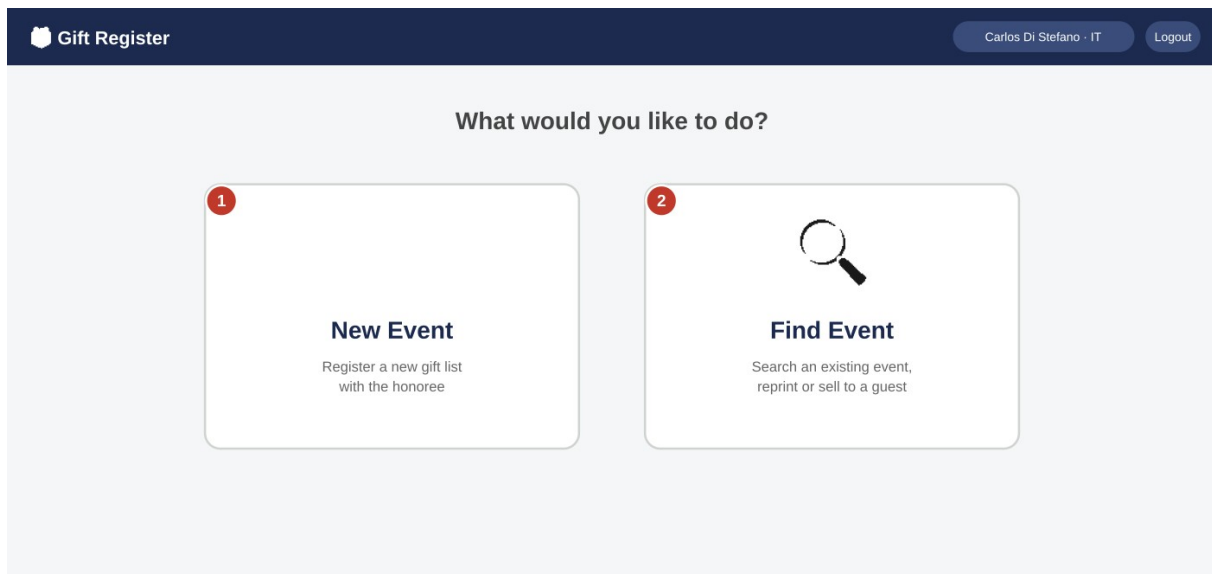
If your credentials are correct, you will land on the main screen.

Note

If your password doesn't work, don't try it many times in a row — Odoo can lock your account. Better let IT know so they can verify it.

3. Main Screen

After signing in you will see two big options in the center of the screen. This is the main screen you will return to every time you finish a task.



Main screen: What would you like to do?

Options

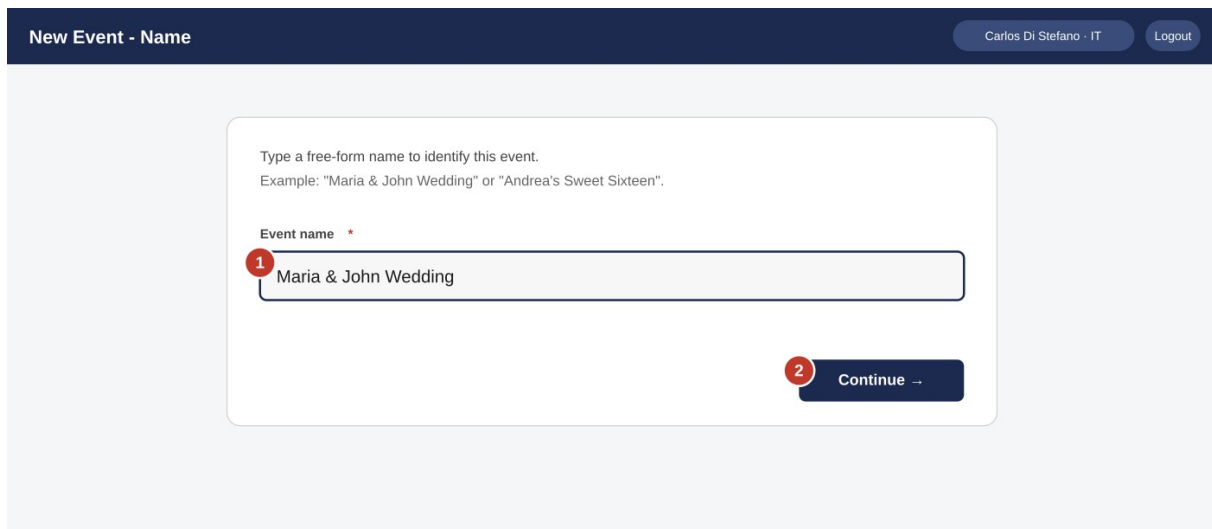
- **New Event** — Tap this when a new honoree arrives to register their gift list. It walks you through every step to create the event and scan the products they want to receive.
- **Find Event** — Tap this when a guest arrives to buy products from an existing event's list, or when you need to reprint a list's PDF, or to see the products sold so far.

4. Register a New Event

This is the longest task in the process. Take your time. The system walks you through four screens: event name, event type, honoree details, and product scanning.

4.1 Step 1: Event name

When you tap New Event, this screen appears for you to write a name that identifies the event.



Screen: event name

1. Type a clear name that identifies the event. Examples: "Maria & John Wedding", "Andrea's Sweet Sixteen", "Carlos Birthday 50".
2. Press Continue to move on to the next step.

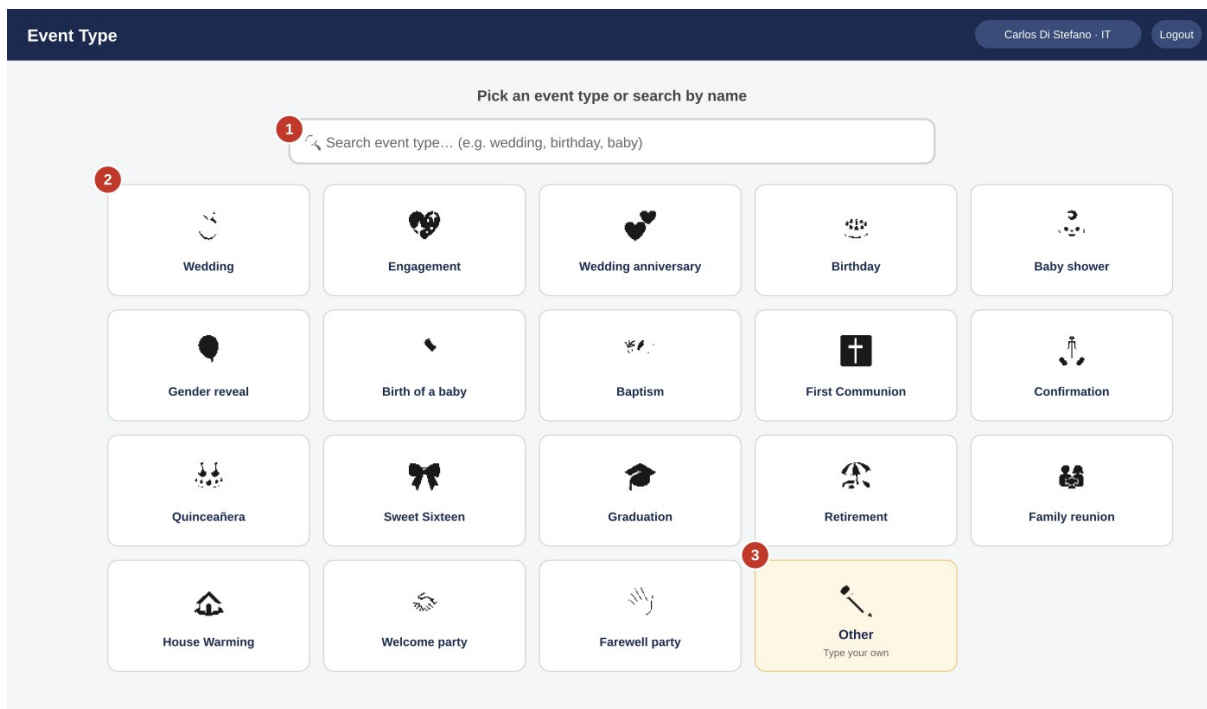


Tip

The name can be anything that helps you identify the event later when you search for it. Use the actual honorees' names so it's easy to find.

4.2 Step 2: Event type

Now you choose what kind of celebration it is. You can do it two ways: searching by name, or tapping one of the tiles.



Screen: event type selection

Option 1: use the search

1. Tap the search box and type part of the event's name. For example, type "baby" to see Baby shower, Birth of a baby, and Baptism.
2. Tap the right result and you'll go straight to the next step.

Option 2: tap the icon directly

1. Look at the tile grid and tap the one that matches your event.

If your event isn't in the list

1. Tap the yellow Other tile at the end of the grid.
2. Type the name of the custom event type.
3. Press Continue.

4.3 Step 3: Event details

Here you fill in the honoree's information plus any extra fields specific to the event type. Only the fields marked with a red asterisk (*) are required.

Event Details

Carlos Di Stefano · IT Logout

Wedding · Maria & John Wedding

Event date *

1 06/15/2026

HONOREE (REGISTRANT)

2 Name *

Maria Gonzalez

Phone 868-555-1234 Email maria@example.com

EVENT-SPECIFIC DETAILS

3 Bride's name Maria Gonzalez Groom's name John Smith

4 Continue to Scanning ...

Screen: event details

Always-present fields

- **Event date *** — the actual date of the event (wedding, birthday, etc).
- **Name *** (in the Honoree section) — the honoree's full name, the person registering the list.
- **Phone** and **Email** — contact info for the honoree (optional but recommended).

Type-specific fields

Depending on the type you picked in the previous step, additional tailored fields will appear. For example:

- **Wedding:** Bride's name, Groom's name.
- **Baby shower:** Baby's name, Mother's name, Father's name.
- **Birthday:** Age turning.
- **Graduation:** Graduate's name, Institution.

All of these extra fields are optional — they are helpers so the list is more complete, but they don't block you if left empty.

1. Fill in the fields.
2. Press Continue to Scanning to move on to product scanning.

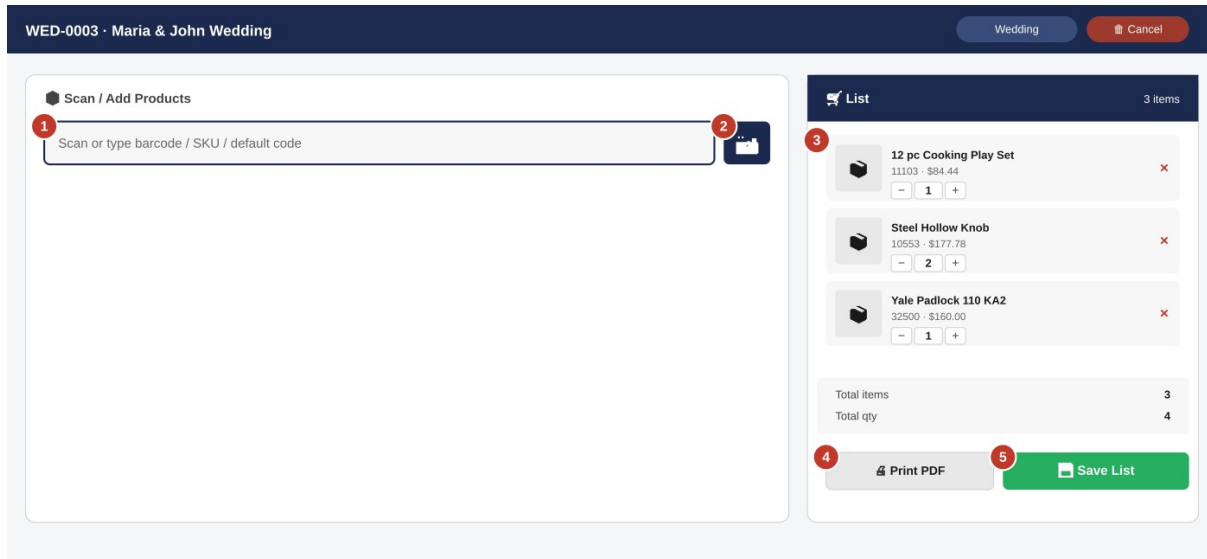
Important

Before continuing, double-check the event date. If you get it wrong, the event saves with that date and it's not easy to correct later.

4.4 Step 4: Scan products

This is the most active part of the process. The system creates the event and takes you to the workspace where you'll scan every product the honoree wants to receive.

At this point the system assigns the event a short code (e.g. WED-0003) that you'll see at the top left. That code uniquely identifies the event.



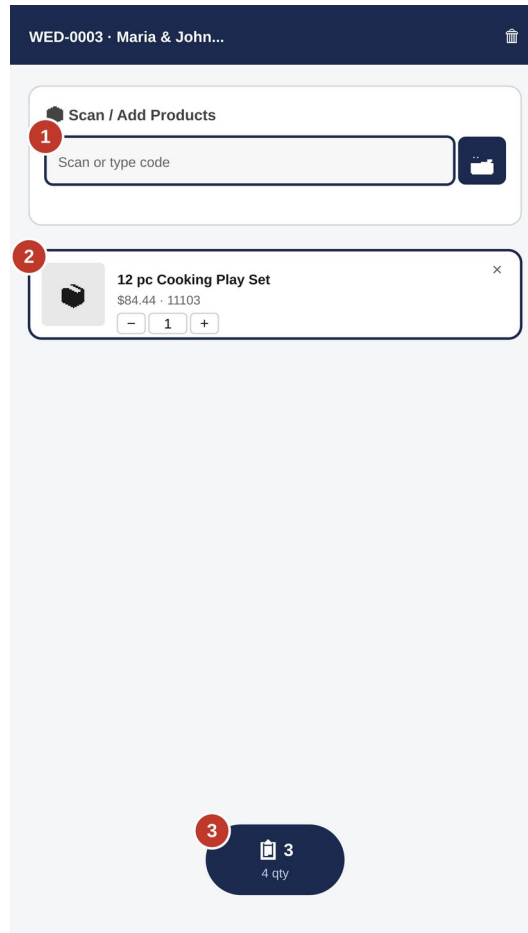
Screen: product scanning (computer or tablet)

How to scan

1. Walk around the showroom with the honoree, tablet or scanner in hand.
2. For each product they want to register, scan its barcode with the gun or with the camera (📷 button).
3. You can also type the code into the search box if you prefer.
4. The product shows up in the right panel (List). If the honoree wants more than one, adjust the quantity with the + and – buttons.
5. If you make a mistake, press the red × to remove the product.

Mobile or small-tablet view

On small screens, the list doesn't show on the right. Instead a floating navy button with a 📋 icon appears at the bottom right. Tap it to view and edit the list while you walk.



Mobile view with the floating  button

When you finish scanning

- **Print PDF** — prints the gift list document. This is what gets handed to the honoree or posted in the event area.
- **Save List** — saves the list in the system and makes it ready for guests to start buying from.

When you save, the system will offer to print the PDF too. If everything looks right, say yes.

Tip

If the honoree isn't sure about some product, don't add it now. It's better to add it later with Add more products (section 6) once they've decided. It's easier to add than to remove.

5. Find an Existing Event

When a guest arrives to buy, or when you need to reprint a list's PDF, use Find Event from the main screen.

Screen: find event

5.1 Searching

1. In the main search field, type what you know: part of the event's name, the code (WED-0003), or the honoree's name. The search is instant.
2. If the list of results is too long, use the extra filters:
 - **From / To:** event date range.
 - **Status:** Open (you can still buy from it) or Closed (already closed).

5.2 What each result shows

Each row in the list displays:

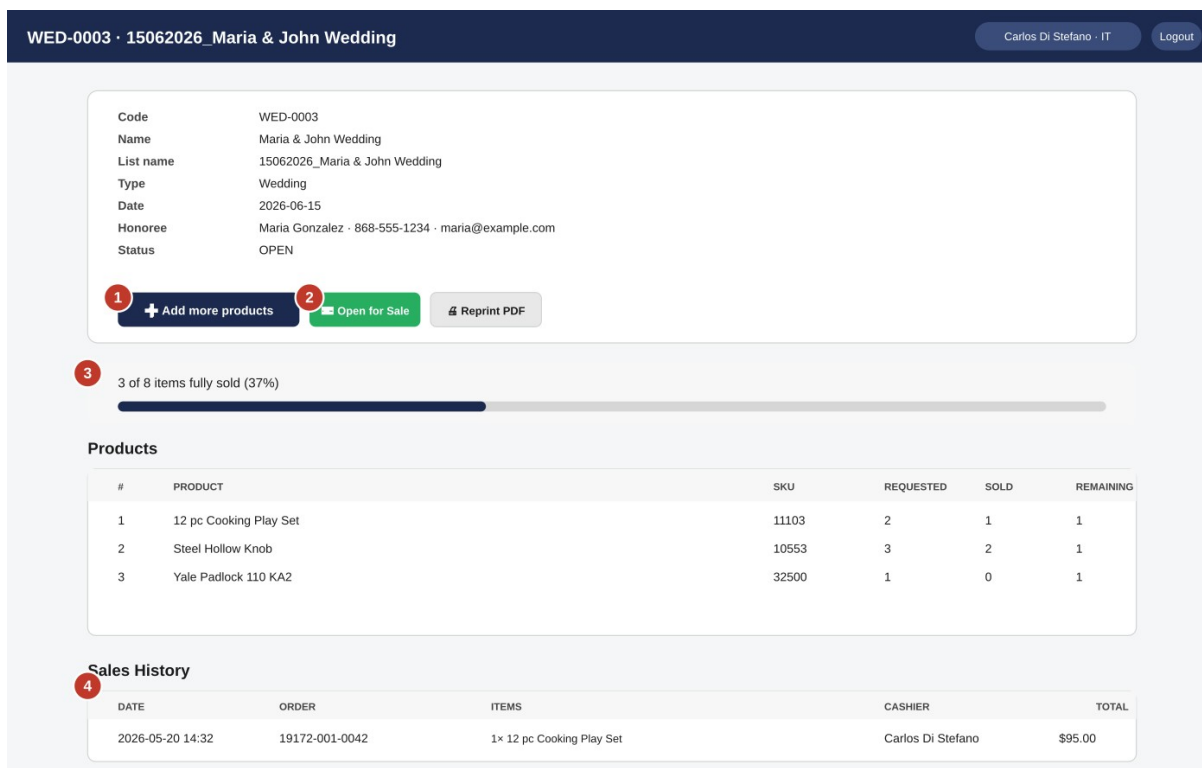
- **Name and code** of the event.
- **Event type** (Wedding, Birthday, etc) and **status** (OPEN or CLOSED).
- **Honoree** and the **sales progress** (e.g. "3 of 8 sold out").

5.3 Available actions in each row

- **Reprint** — reprints the list's PDF. Useful if the original got lost or if the honoree asks for a copy.
- **View** — opens the event's detailed view showing all its products and the sales made so far.
- **Sell** (only on OPEN events) — opens the event so you can sell to a guest that just arrived.

6. View an Event in Detail

When you press  View from the search, you see all the event's information: its data, registered products with their sales progress, and the history of each purchase.



WED-0003 · 15062026_Maria & John Wedding Carlos Di Stefano · IT Logout

Code: WED-0003
 Name: Maria & John Wedding
 List name: 15062026_Maria & John Wedding
 Type: Wedding
 Date: 2026-06-15
 Honoree: Maria Gonzalez · 868-555-1234 · maria@example.com
 Status: OPEN

1 + Add more products 2 Open for Sale Reprint PDF

3 3 of 8 items fully sold (37%)

Products

#	PRODUCT	SKU	REQUESTED	SOLD	REMAINING
1	12 pc Cooking Play Set	11103	2	1	1
2	Steel Hollow Knob	10553	3	2	1
3	Yale Padlock 110 KA2	32500	1	0	1

Sales History

DATE	ORDER	ITEMS	CASHIER	TOTAL
2026-05-20 14:32	19172-001-0042	1× 12 pc Cooking Play Set	Carlos Di Stefano	\$95.00

Screen: event detail

What it shows

- Event data (code, name, type, date, honoree, status).
- Progress bar with the percentage of products that are fully sold.
- Product table with requested, sold and remaining quantities.
- Sales history with date, order number, purchased products, cashier and total.

6.1 Add more products to an open event

If the honoree comes back after saving their list and wants to add more products, you can do it from here.

1. Search for the event with Find Event and open it with View.
2. Press the navy  Add more products button.
3. It takes you to the scan workspace, but in "append" mode. You'll see an indicator at the top showing how many products the list already has.
4. Scan the new products like before. The system warns you with a yellow message if you scan a product that was already on the list — that adds quantity to what's already there.
5. When done, press Add to Existing List.

Note

Products can only be added to OPEN events. CLOSED events don't accept changes.

6.2 Reprint the PDF

If you need a new copy of the list's PDF, press the  Reprint PDF button at the top. It will be sent to the configured printer.

7. Sell to a Guest

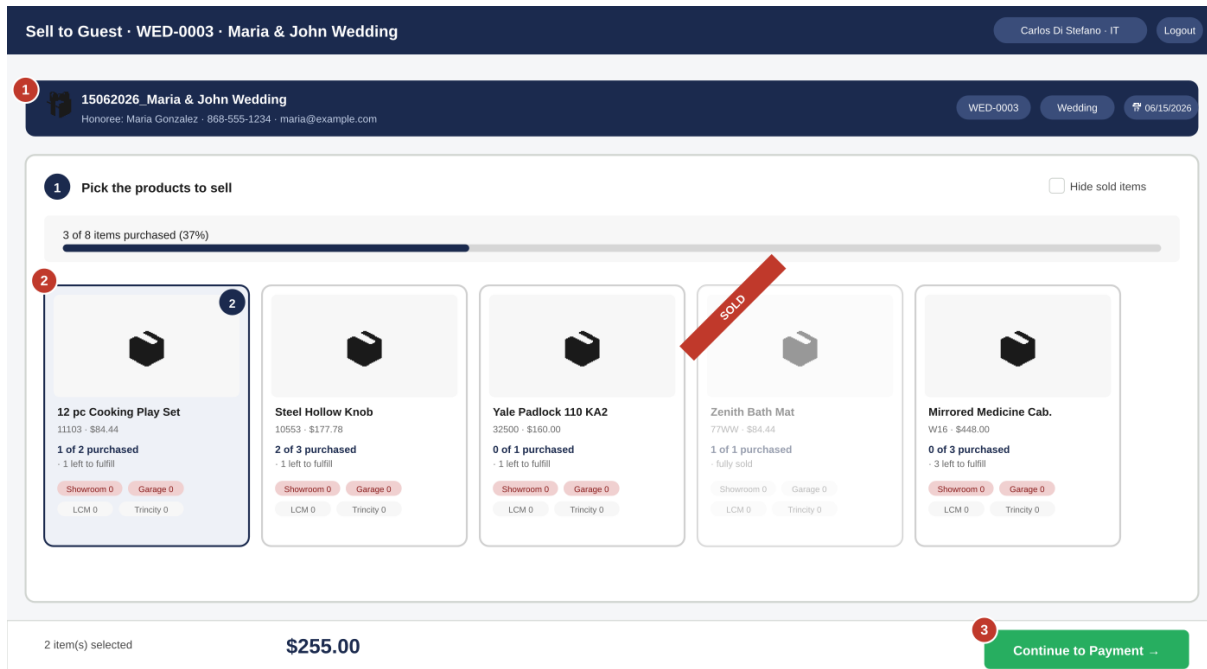
When a guest arrives at the store saying they are buying from such-and-such event's list, this is the flow.

7.1 Find the event and open it for selling

1. From the main screen, press Find Event.
2. Search the event by name, or ask the guest for the event code if they have it.
3. When you find it, press the green  Sell button right on the event's row. (You can also press View and from there choose Open for Sale.)

7.2 Pick the products to sell

It will take you to this screen showing all the event's products as tiles.



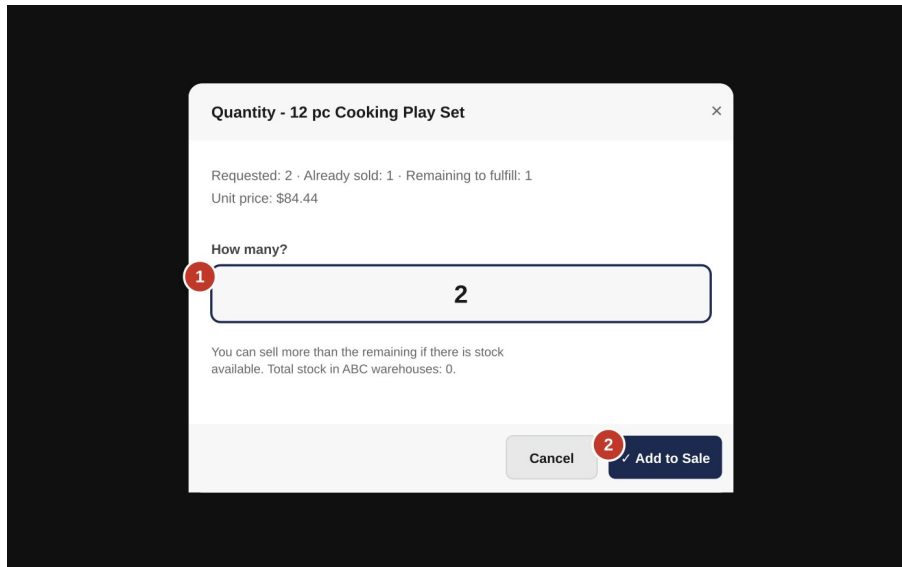
Screen: sell to guest

How products are displayed

- Each product shows its photo, name, SKU, price and a progress bar (how many sold, how many remaining).
- Below each product you'll see available stock per branch (Showroom, Garage, LCM, Trincity). If stock is 0 or very low, it shows in red.
- Fully sold products have a red SOLD banner and appear dimmed. If you want to hide them and see only what's still available, tick the Hide sold items checkbox.

Picking quantities

1. Tap the tile of the product the guest wants to buy.
2. A dialog opens for you to enter the quantity.



Dialog: pick quantity

3. Type the quantity and press ✓ Add to Sale.
4. The tile gets marked with a navy circle showing the number you picked.
5. Repeat for each product the guest wants. At the bottom right you'll see the running total.

Continue to payment

1. When you're done picking products, press the green Continue to Payment → button.

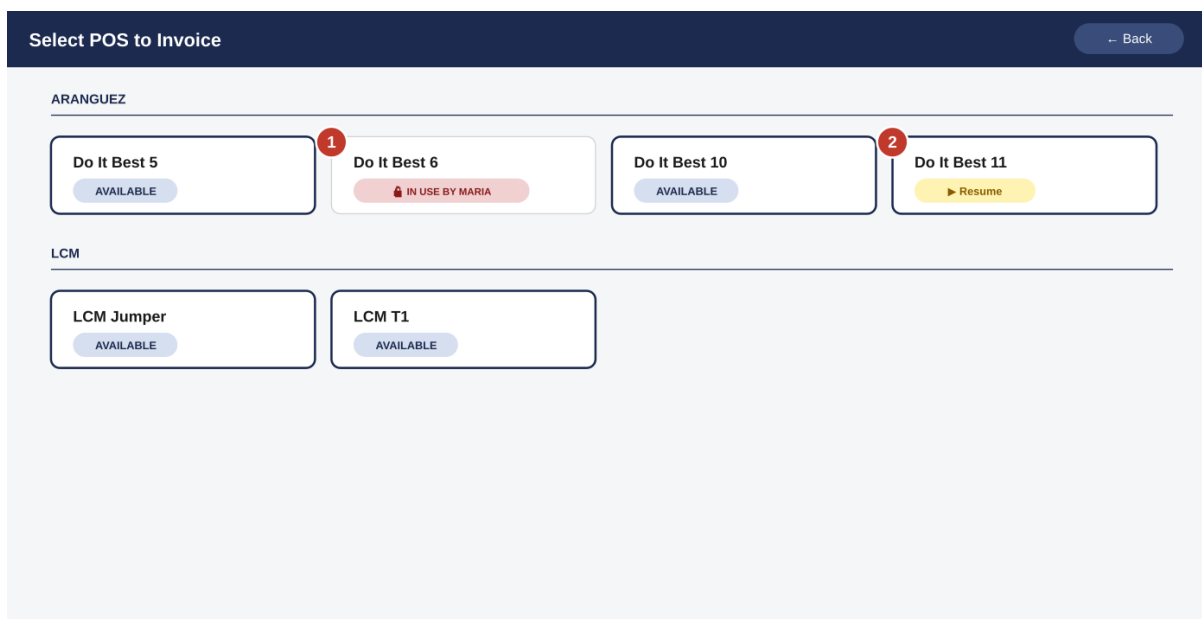


Tip

You can sell more units than the honoree registered, as long as there's stock available. For example: the honoree asked for 1 unit and it has already sold, but a guest wants to buy 2 more. The system allows it if the store has the stock.

7.3 Pick the POS

After pressing Continue to Payment, the system shows you the POSes available to invoice from.



Screen: POS selection

- **AVAILABLE:** the POS is free. Tap to open it.
 - **IN USE BY [name]:** someone else has that POS open right now. Don't touch it.
 - **▶ Resume:** you have a pending session of your own on that POS. Tap to resume it.
1. Tap the POS you'll use.
 2. If the POS is fresh (AVAILABLE), it will ask for the opening cash amount.
 3. Then the payment window will open for you to register how the guest paid (cash, card, etc).

7.4 Process the payment

The payment window works the same as Odoo's POS:

1. Select the payment method (Cash, Card, etc).
2. Type the amount.
3. If they paid cash and owe change, the system computes it automatically.
4. Press Confirm Payment.

After a few seconds, the order is created in Odoo and the receipt prints on the POS's thermal printer.

7.5 What if I make a mistake and want to go back?

At any moment before pressing Confirm Payment, you can press the ← Back button at the top of the screen. The system takes you back to the previous step keeping your product selection. If you want to cancel everything, press Back several times until you return to the main screen.

8. Frequently Asked Questions

How does an event get closed?

Events close automatically when every product on the list has been fully sold. You don't need to do anything — the system detects it and switches the status to CLOSED.

Can I modify an event after saving it?

You can add more products if the honoree comes back with new ideas (section 6.1). For other changes, contact your supervisor.

What happens if the thermal printer isn't working?

The system first tries the thermal printer. If that fails, it automatically sends the receipt as a PDF to the Brother laser printer. If neither works, talk to IT.

Can I sell more units than the honoree registered?

Yes. If the honoree asked for 1 product and it has already sold, but another guest also wants it, the system allows it as long as there's stock available in the store.

Does the guest need to give their name?

No. Purchases can be made anonymously without asking the guest for their details.

How do I know which products are still pending?

From Find Event open the event with View. You'll see the product table with the "Requested", "Sold" and "Remaining" columns, plus the overall progress bar.

Can I print the gift list of an already closed event?

Yes. Any event, open or closed, can be reprinted from Find Event with the  Reprint button.

I'm getting an error I don't understand

Take a screenshot and share it with your supervisor or IT. Include the event code if you were working with one.

Final reminder

If you're unsure while working with a customer in front of you, don't improvise. Better to say "one moment, let me check" and consult this manual or call your supervisor than make a mistake in the sale.