Woodforest Acceptance Solutions

ODOO Plug-In/Connector

Executive Summary

The WAS Odoo Plug-In enables businesses to accept and reconcile payments natively inside Odoo ERP workflows, including invoicing, subscriptions, accounting, and point of sale. Rather than bolting payments onto the ERP through third-party gateways or custom integrations, the WAS Connector embeds payment acceptance directly into how the business already operates—keeping transactions, financial records, and operational data fully synchronized within Odoo.

Designed for ERP-driven organizations, this solution pairs Odoo's modular business platform with Woodforest Acceptance Solutions' bank-backed acquiring infrastructure. WAS owns underwriting, processing, settlement, funding, risk, compliance, and support, while Odoo remains the system of record for invoicing, accounting, inventory, subscriptions, and commerce. The result is faster collections, cleaner reconciliation, and a scalable payments foundation without re-platforming.

Who It's Built For

- Professional services and invoice-driven businesses
- Subscription and recurring-revenue companies
- Wholesale, distribution, and B2B merchants
- Retail and omnichannel merchants using Odoo POS

Core Use Cases

- Embedded Invoice Payments & Faster Collections
- Subscription & Recurring Billing at Scale
- Unified Omnichannel Commerce
- Growth Across Locations & Entities

Platform Differentiation

Unlike ERP or gateway-based payment add-ons, the WAS Odoo Plug-In preserves direct acquiring under a single bank-backed relationship. Sensitive card data remains outside the ERP in PCI-compliant WAS infrastructure, while payments, invoices, and accounting stay synchronized in near real time. Card-present payments are supported via WAS-approved PAX hardware, and card-not-present payments via invoice and subscription workflows.

Partner & Merchant Value

For merchants, Odoo with WAS replaces fragmented payment tools with a unified ERP-centric model that improves cash flow, reporting accuracy, and operational efficiency. For partners, the solution expands reach into ERP-first and subscription-driven businesses while maintaining WAS economics, compliance, and long-term account ownership.

Odoo with WAS wins when payments need to live inside the business system - not outside of it.

---

1. Product Overview

What the Product Is

Odoo is a modular, open-source ERP and business management platform that unifies core functions such as accounting, invoicing, CRM, inventory, eCommerce, and point of sale into a single, integrated system. Its app-based architecture allows businesses to start with the tools they need and scale over time, making Odoo well suited for small, mid-market, and enterprise organizations seeking flexibility and centralized operations. **Woodforest Acceptance Solutions (WAS)** connects to Odoo through a dedicated payment plugin and ERP integration framework, enabling secure payment acceptance directly within the Odoo environment. This connection allows merchants to process payments, synchronize transaction data with Odoo accounting and invoicing, and leverage WAS for merchant acquiring, gateway connectivity, and ongoing support—delivering a seamless ERP-to-payments experience.

Portfolio Strategy

WAS added the Odoo Connector to support merchants that operate on ERP-driven workflows rather than POS-only environments, while preserving WAS's direct acquiring model. The connector embeds payment acceptance directly into Odoo's invoicing, subscriptions, accounting, inventory, and omnichannel workflows—eliminating the need for third-party aggregators or custom integrations. This gives merchants a unified system where payments and financial data stay in sync, and allows partners to expand into ERP-first and subscription-based businesses with a pre-integrated solution that maintains WAS economics, compliance, and account ownership.

Ideal Customer Profile (ICP)

WAS Odoo Connector works best for businesses that run their operations inside an ERP and want payments fully embedded into invoicing, subscriptions, and POS workflows—without relying on third-party aggregators or disconnected gateways. The simple qualifying question is:

"Does this business use Odoo as its primary system to run invoicing, accounting, inventory, or subscriptions?"

If yes, the Odoo plug in is very likely a strong fit.

- Small to Mid Sized-Market Businesses using Odoo ERP
    - Merchants that manage accounting, inventory, and sales within Odoo
    - Businesses looking to unify operations and payments in a single system

- Professional & Service-Based Businesses
    - Accounting Firms
    - Consulting & Professional Services
    - Field Services (IT services, maintenance, contractors)
    - Healthcare-adjacent and regulated service providers
    - Invoice-driven businesses collecting payment after service delivery

- Subscription & Recurring Revenue Businesses
    - SaaS-like service providers
    - Membership-based organizations
    - Subscription box or recurring product merchants
    - Businesses billing monthly, quarterly, or annually

- Wholesale, Distribution, & B2B Merchants
    - Businesses issuing large or recurring invoices
    - Merchants managing complex pricing, customers, and fulfillment
    - Companies requiring ERP-level reporting and reconciliation

- Retail & Omnichannel Merchants using Odoo POS
    - Retailers running both in-store and online operations
    - Merchants needing POS + invoicing + inventory in one platform
    - Multi-location or pop-up retail environments

- Growing & Multi-Entity Businesses
    - Merchants operating under multiple business units or brands
    - Businesses with shared accounting but separate locations or users
    - Operators that have outgrown entry-level POS systems

Ideal Size & Complexity Indicators

- Merchants with 5–100+ users
- Merchants with 1–50+ locations
- Merchants managing moderate to large product catalogs or invoices
- Businesses already committed to Odoo as a core operating platform

Vertical-by-Vertical Breakdown

Retail & Omnichannel Commerce

Pain Points: Retailers often run disconnected systems for POS, eCommerce, inventory, and accounting, leading to manual reconciliation, inventory mismatches, and limited visibility across channels. Odoo currently has limited card present capability available on the marketplace.

Odoo Solves: Odoo unifies in-store POS, online sales, inventory, and accounting in a single platform, while the WAS Odoo Connector embeds payments directly into those workflows—keeping transactions, orders, and reporting in sync.

Opening Line: "Are you running separate systems for in-store sales, online orders, and accounting today? Odoo with WAS brings payments and retail operations together in one platform."

Professional Services & Invoice-Driven Businesses

Pain Points: Service-based businesses struggle with manual invoicing, delayed payments, and disconnected payment tools that don't tie back cleanly to accounting systems.

Odoo Solves: Odoo natively handles invoicing and accounting, and the WAS Odoo Connector allows customers to pay invoices directly within Odoo, automatically updating payment status and ledgers without manual intervention.

Opening Line: "How are you collecting invoice payments today, and how much of that is still manual? Odoo with WAS lets your customers pay invoices immediately while keeping your books automatically updated."

Subscription & Recurring Revenue Businesses

Pain Points: Subscription businesses face challenges managing recurring billing, payment retries, customer payment methods, and revenue tracking across multiple systems.

Odoo Solves: Odoo provides built-in subscription management, while WAS enables secure, tokenized payments handled directly within the subscription workflow—reducing churn and simplifying recurring collections.

Opening Line: "Do you bill customers on a recurring basis today? Odoo with WAS simplifies subscription payments by managing billing and payment acceptance in one system."

Wholesale, Distribution & B2B Commerce

Pain Points: B2B merchants often rely on large invoices, complex pricing, and manual payment follow-ups, with limited visibility into payment status and reconciliation.

Odoo Solves: Odoo supports complex invoicing and customer management and WAS embeds enterprise-grade payment acceptance directly into those invoices—allowing faster collections and real-time payment tracking.

Opening Line: "How much time does your team spend tracking invoice payments and reconciling accounts? Odoo with WAS streamlines B2B invoicing and payment acceptance in one platform."

Field Services & Project-Based Businesses

Pain Points: Field service companies struggle with delayed billing, disconnected mobile payments, and back-office reconciliation after work is completed.

Odoo Solves: Odoo manages projects, work orders, and invoicing, while the WAS Connector enables seamless invoice and card-present payments—keeping service delivery and payment tightly connected.

Opening Line: "After a job is completed, how easy is it for you to get paid? Odoo with WAS helps field service businesses turn completed work into collected revenue faster."

Hospitality, Events & Pop-Up Commerce

Pain Points: Hospitality and event-based merchants need flexibility to accept payments across locations, pop-ups, and temporary environments without complex setups.

Odoo Solves: Odoo's POS combined with WAS-supported payment devices allows merchants to accept payments wherever business happens, while still maintaining centralized accounting and reporting.

Opening Line: "Do you operate across multiple locations or pop-up environments? Odoo with WAS gives you flexible payment acceptance without sacrificing centralized control."

Multi-Entity & Growing Businesses

Pain Points: Growing businesses often outgrow entry-level POS solutions and struggle to manage multiple locations, brands, or entities using separate systems.

Odoo Solves: Odoo supports multi-company and multi-entity operations natively and WAS provides a consistent acquiring layer across all entities—simplifying payments as the business scales.

Opening Line: "As your business grows, are payments becoming harder to manage across locations or entities? Odoo with WAS is built to support growth without re-platforming."

NOT a good fit

- POS-only environments where speed matters more than back-office integration
- Merchants unwilling to adopt or manage an ERP system
- Extremely large enterprises requiring heavily customized or proprietary ERP builds
- Businesses not using Odoo and with no intent to migrate to it

Primary Use Cases

Use Case #1

Problem: We send invoices manually and rely on separate payment tools, which slows down collections and creates reconciliation issues.
Feature: Odoo provides native invoicing and accounting, and the WAS Odoo Connector allows customers to pay invoices directly within Odoo with real-time payment status updates.
Value: Merchants reduce days sales outstanding (DSO), eliminate manual reconciliation, and get paid faster while keeping invoices, payments, and accounting fully aligned.

Use Case #2

Problem: Our subscription and recurring billing processes are fragmented, causing missed payments, manual follow-ups, and poor visibility into revenue.
Feature: Odoo supports subscription management while WAS enables secure, tokenized payment acceptance embedded directly into recurring billing workflows.
Value: Merchants improve cash flow predictability, reduce churn, and simplify recurring collections without managing multiple billing or payment systems.

Use Case #3

Problem: We operate across in-store, online, and invoice-based sales, but payments and reporting are split across different platforms.

Feature: Odoo unifies POS, eCommerce, invoicing, and inventory, while the WAS Odoo Connector embeds a single acquiring layer across all channels.

Value: Merchants gain a consolidated view of sales and payments, reduce operational complexity, and manage omnichannel commerce from one system.

Use Case #4

Problem: As our business grows across locations or entities, payments become harder to manage and reporting becomes inconsistent.

Feature: Odoo supports multi-company and multi-entity operations, and WAS provides consistent, enterprise-grade payment processing across all locations.

Value: Merchants scale confidently without re-platforming, maintain centralized reporting, and ensure payments remain standardized as the business expands.

High-Level Functionality

Odoo enables businesses to accept, manage, and reconcile payments directly within their ERP workflows—including invoicing, subscriptions, and POS—without relying on disconnected payment systems. When paired with the WAS Odoo Connector, payment acceptance is embedded into Odoo's native sales, accounting, and operations modules, allowing transactions to flow seamlessly from authorization through reconciliation. This gives merchants flexible ways to get paid while keeping payments, financial data, and day-to-day business processes centralized, secure, and easy to manage as the business grows.

Positioning Statement / Elevator Pitch

Short "Walk-up" Pitch (15 Seconds)

"Odoo is an all-in-one business management platform that brings invoicing, subscriptions, POS, accounting, and payments into a single system. With the WAS Odoo Connector, merchants can accept and reconcile payments directly inside Odoo—eliminating disconnected tools and manual processes while gaining full operational visibility."

Competitive Displacement Pitch (Oracle NetSuite/ERPNext)

"NetSuite and ERPNext require merchants to bolt payments onto the ERP through external gateways, middleware, or custom builds. Odoo with WAS embeds payment acceptance natively into ERP workflows—payments, invoices, accounting, and POS in one system. No aggregators. No reconciliation friction. WAS provides direct, enterprise-grade acquiring while Odoo delivers full operational control from a single platform."

Discovery-Led Opening (Conversation Starter)

"What system do you use today to manage invoicing, accounting, and day-to-day operations—and how many separate tools are involved in getting paid?"
Odoo with WAS is designed for businesses that want payments to live inside their business system, not outside of it."

Margin Protection / Cost Recovery Pitch

"By embedding payments directly into Odoo, businesses eliminate redundant software, manual reconciliation, and third-party gateway fees. With WAS as the acquiring partner, merchants maintain direct processor access, predictable economics, and long-term scalability—protecting margins while reducing operational overhead."

Messaging Hierarchy

Sales conversations should always lead with the core message that payments are embedded directly inside Odoo ERP workflows rather than managed through separate or disconnected systems.

Secondary messages should be introduced based on the buyer's needs and may include faster invoice and subscription collections, reduced reconciliation for finance teams, and consistent payment management across POS, invoicing, and recurring billing.

Supporting proof points such as direct acquiring through Woodforest, PCI-compliant tokenization, and multi-entity support should reinforce credibility once interest is established.

Technical details, hardware specifications, and advanced configuration topics should not be used early in the sales conversation and are best reserved for later stages.

Selling by Buyer Role

Business owners and founders typically care about simplicity, scalability, and visibility. Position Odoo with WAS as a way to consolidate systems and support growth without replatforming.

Finance managers and controllers focus on reconciliation, reporting, and controls. Emphasize how payments, invoices, and accounting stay synchronized inside Odoo.

Operations leaders care about workflows and efficiency. Highlight how payments are tied directly to operational actions such as invoicing, POS transactions, or subscriptions.

IT teams and implementation partners care about control, extensibility, and security. Position the solution as a modular ERP platform with direct acquiring and enterprise-grade compliance.

Objection Responses

"I'm worried this will get expensive over time."	Odoo helps control long-term costs by replacing multiple systems with one platform. Combined with WAS's direct acquiring model, businesses reduce software sprawl, manual labor, and third-party fees—protecting margins as they scale.
"How is this different from other ERP or payment solutions?"	That's where Odoo excels. It was built to support growth—whether that means more users, multiple locations, subscriptions, or additional business units—without changing systems or adding disconnected software. It also targets merchants of various sizes and can create a solution that fits multiple needs instead of out of the box, rigid systems like other ERPs.
"What happens when my business grows or adds locations?"	Most systems work fine — until the business grows. The real question is whether your system helps you run the entire business or just process transactions. The WAS Odoo plugin gives you full operational visibility and simplifies control across every part of your operation.
"Odoo seems too complex for my business."	Odoo is modular by design, which means you only use what your business needs today. You can start with invoicing and payments and expand into POS, subscriptions, or inventory over time—without overwhelming your team.
"We already have accounting or invoicing software."	Many businesses start there, but those tools often stop at basic financial tracking. Odoo goes further by connecting invoicing, accounting, payments, and operations—reducing manual work and eliminating data gaps between systems.

Odoo with Woodforest Acceptance Solutions wins when merchants need payments embedded into broader business workflows rather than operating as a standalone function.

Against POS-only platforms, this solution is strongest when merchants rely on invoicing, subscriptions, accounting integration, or multi-location operations.

Against standalone gateways, it wins when merchants want payments fully integrated into their ERP instead of managed through separate systems.

Sales teams should avoid poor-fit opportunities where merchants only want a plug-and-play terminal, refuse to adopt ERP workflows, or prioritize transaction speed over back-office integration.

Key Configurations and Sales Channels

Key Configurations

Odoo is a cloud-based ERP platform deployable in cloud-hosted or on-premise environments, configurable to support invoicing, subscriptions, POS, eCommerce, inventory, and accounting based on merchant needs. When paired with the WAS Odoo Connector, Odoo can be configured for card-present payments using WAS-supported PAX terminals, card-not-present invoice payments, and recurring billing, with modules enabled incrementally as the business grows.

Sales Channels

Odoo with the WAS Connector is sold through WAS internal sales teams, approved ISOs, and implementation partners supporting Odoo deployments. Merchant onboarding, underwriting, payment provisioning, hardware fulfillment, and ongoing support are coordinated through WAS, while allowing partners to participate in ERP implementation, integration, and long-term account management.

2. Product Capabilities

Feature	Availability	Description
POS & In-Person Commerce		
Point of Sale (POS)	✓	Enables in-store sales, order management, and checkout from Odoo's POS interface.
Card-Present Payments	✓	Supports secure, EMV-compliant in-person transactions using WAS-supported payment hardware.
Multi-Register & Multi-Location Support	Add-On $	Allows businesses to operate multiple registers and locations under a centralized system.
Inventory & Product Management		
Product & Service Catalog Management	✓	Create and manage products or services used across invoicing, POS, and inventory.
Inventory Tracking	Add-On $	Tracks stock levels, movements, and availability across locations.
Purchase Orders & Vendor Management	Add-On $	Create purchase orders and manage supplier relationships directly tied to inventory.
Reporting & Administration		
Financial & Operational Reporting	✓	Provides built-in dashboards and reports for sales, payments, accounting, and operations.
Multi-Company / Multi-Entity Management	Add-On $	Supports businesses operating multiple legal entities or brands from one Odoo environment.
User Roles & Permissions	✓	Control system access by role, department, or responsibility.
Platform & Extensibility		
Modular, Scalable Architecture	✓	Enables businesses to start small and add functionality over time without re-platforming.
API & Third-Party Integrations	✓	Supports integration with payment processors, gateways, and external systems like WAS.
Cloud or On-Premise Deployment	✓	Merchants can deploy Odoo in the cloud or on-premise depending on operational and compliance needs.

How This Is Typically Positioned in Sales

- **Base Package =** Core ERP, invoicing, accounting, reporting
- **Additional Cost =** Payments, POS, subscriptions, inventory, advanced workflows

Limitations

- Not a plug-and-play payments solution - Odoo is an ERP platform and requires configuration, module selection, and setup. It is not designed for merchants looking for a same-day, minimal-setup payment terminal.
- ERP learning curve for smaller or simpler businesses - Businesses with very simple operations may find Odoo more robust than necessary, especially if they do not need invoicing, accounting, or operational management beyond payments.
- Payment features limited to documented functionality - Only explicitly documented payment flows (POS, pay-by-link, tokenized payments, refunds, sync jobs) are supported; undocumented or future capabilities should not be assumed.

- POS functionality depends on Odoo POS scope - The connector supports Odoo POS workflows but does not replace enterprise QSR or ultra-high-throughput POS systems designed solely for speed.
- Hardware support is constrained to WAS-approved terminals - Card-present payments require supported(PAX) devices; unsupported hardware cannot be used.
- Support model and tiers still maturing - Formal L1/L2/L3 support boundaries and partner enablement flows are still being finalized as part of the go-to-market rollout.
- Not intended for non-Odoo merchants - The WAS Odoo Connector is purpose-built for merchants already using—or committed to using—Odoo ERP; it is not a general gateway or POS replacement.

User Personas

Odoo supports configurable user roles and permissions that align with how modern businesses operate across finance, sales, operations, and payments. This allows businesses to give each user access only to what they need, while keeping payments, accounting, and operations centralized.

Example User Personas

- Business Owner / Founder
  Owns overall business performance and needs real-time visibility into invoicing, payments, cash flow, and growth. This persona values having payments embedded directly into the system that runs the business instead of managing separate tools.
- Finance Manager / Controller
  Responsible for invoicing, reconciliation, refunds, and financial reporting. Odoo with WAS allows this user to manage payments and accounting in one ERP while maintaining proper controls and auditability.

Example Business-Type Personas

- Invoice-Driven Professional Services Business
  Firms such as consultants, agencies, accountants, or service providers that rely on invoicing after work is performed and need faster collections with clean accounting.
- Subscription or Recurring-Revenue Business
  Memberships, service contracts, or subscription-based businesses that require recurring billing, stored payment methods, and visibility into ongoing revenue.
- Growing Multi-Location or Multi-Entity Business
  Retailers or operators expanding across locations or business units that have outgrown basic POS systems and need ERP-level control with integrated payments.

3. Architecture & Technical Summary

High-Level Architecture Diagram

Odoo is built as a modular, cloud-based ERP platform where core business applications—such as invoicing, accounting, POS, inventory, and subscriptions—run centrally within the Odoo environment, rather than on local servers or siloed systems. Payments are embedded into these workflows through the WAS Odoo Connector, which securely connects Odoo to WAS's external, PCI-compliant acquiring and processing infrastructure. Odoo manages business logic, user access, and operational data, while sensitive card data is handled outside the ERP, allowing transactions, payment statuses, and financial records to stay synchronized in near real time. This architecture delivers scalability, security, and flexibility, enabling businesses to add users, locations, and functionality without managing on-premise infrastructure or re-platforming as they grow.

Ecosystem Fit

Odoo serves as Woodforest Acceptance Solutions' ERP and software-first platform for merchants that run invoicing, subscriptions, accounting, and commerce inside a single business system. Through the WAS Odoo Connector, Odoo embeds payment acceptance directly into ERP workflows while leveraging WAS as the centralized acquiring and payment operations layer. All transactions route through WAS-supported processing infrastructure, allowing Odoo to function as the merchant-facing system of record while WAS manages onboarding, underwriting, authorization, settlement, funding, and compliance—enabling ERP-driven merchants and partners to scale without building or managing payments infrastructure.

System Requirements

- Odoo Environment (Cloud-Hosted or On-Premise)
    - An active Odoo deployment with the required business modules enabled (e.g., Invoicing, Accounting, POS, Subscriptions, as applicable).

- WAS Odoo Connector Module Installed
    - The Woodforest payment module installed within the merchant's Odoo environment and configured with WAS-issued credentials.

- WAS-Supported PAX Hardware (Card-Present Payments)
    - Approved Android-based PAX payment terminals provisioned and managed through WAS for in-store payment acceptance.

- Internet Connectivity
    - Reliable internet access via Wi-Fi, Ethernet, or cellular for real-time transaction processing, synchronization, and reporting.

- WAS Merchant Account & Underwriting Approval
    - An approved WAS merchant account to enable payment processing, settlement, funding, and compliance.

- API & Security Configuration
    - Valid API tokens and secure credentials configured in Odoo to authenticate with WAS's PCI-compliant processing infrastructure.

- Modern Web Browser (User Access)
    - Updated web browser for users accessing Odoo dashboards, invoicing, accounting, and reporting functions.

Certified Platform

- VPC - Visa Platform Connect
- TSYS – Total System Services

Security & Compliance Summary

- PCI-Compliant Payment Processing – All card data is processed through WAS's PCI DSS Level 1–compliant infrastructure, keeping sensitive payment data out of Odoo.
- Tokenization of Card Data – Customer card details are tokenized and securely stored outside the ERP, reducing fraud risk and PCI scope.
- Secure API Communication – Encrypted API connections are used between Odoo and WAS for authorizations, captures, refunds, and payment status updates.
- Role-Based Access Controls – Odoo supports granular user permissions to restrict access to payments, financial data, and administrative functions.
- Separation of Business Data and Payment Data – Odoo manages operational and accounting data, while WAS handles payment processing, settlement, and compliance.
- Enterprise-Grade Cloud Availability – Odoo cloud deployments provide redundancy, monitoring, and high availability without merchant-managed infrastructure.
- Centralized Acquiring & Compliance via WAS – WAS manages underwriting, authorization, settlement, funding, and compliance to simplify audits and reduce merchant risk.

4. Product Configuration & Options

Customizable Settings

- Payment Configuration (via WAS Odoo Connector)
    - Payment Methods & Channels: Configure card-present, invoice (pay-by-link), and tokenized customer payments based on business needs.
    - Terminal Assignment: Assign specific WAS-supported PAX terminals to individual POS sessions or locations, preventing conflicts and ensuring accurate transaction tracking.
    - Refund Controls: Enable full or partial refunds directly from Odoo with permissions restricted by role.
    - Multi-Location Payments: Configure payment acceptance per store or entity while maintaining centralized reporting and settlement.
- Tax Rules (State, Local, and Custom Taxes)
    - Fully Configurable Tax Rules: Supports state, local, and custom tax structures based on business or jurisdiction requirements.
    - Location-Specific Tax Settings: Tax configurations can be applied per company, store, or location, supporting multi-entity and multi-location businesses.
- Discounts & Pricing Rules
    - Product-Level Discounts: Configure discounts tied to specific products or services.
    - Pricing Rules & Customer-Specific Pricing: Support variable pricing by customer type, contract, or volume without manual overrides.
- User Roles & Permissions
    - Custom Roles & Access Levels: Create roles based on job function (owner, finance, operations, sales, cashier).
    - Permission-Based Access: Control who can view payments, issue refunds, edit pricing, manage users, or access reports.
    - Separation of Duties: Ensures financial, operational, and administrative controls remain secure as the business scales.

- Invoice, Document & Branding Options
    - Custom Invoice Branding: Add company logos, payment instructions, and branding to invoices.
    - Invoice Delivery Controls: Configure electronic invoice delivery and embedded payment options for customers.
- Subscription & Recurring Billing Controls (If enabled)
    - Subscription Plans & Terms: Create, edit, and manage recurring billing schedules and plans.
    - Automated Renewals: Configure recurring billing rules with tokenized payment methods.
    - Customer Lifecycle Management: Control access to subscription creation, updates, and cancellations by role.
- Reporting & Dashboard Configuration
    - Custom Dashboards: Configure dashboards by role (owner, finance, operations) showing relevant metrics only.
    - Filtered Reporting: View sales, payments, invoices, and tax data by location, entity, or period.
    - Exportable Reports: Financial and transaction reports can be exported for accounting, audits, or external review.
- Multi-Company & Multi-Entity Controls
    - Entity-Level Configuration: Manage multiple companies, brands, or legal entities within a single Odoo environment.
    - Shared or Isolated Data: Control what data is shared or isolated across entities (customers, products, reporting).
    - Scalable Permissions: Maintain governance as the organization grows without re-platforming.

Optional Modules

- Odoo POS (Point of Sale)
- Odoo Subscriptions
- Odoo Inventory
- Odoo Purchase (Purchasing / Purchase Orders)
- Odoo Accounting (Advanced Features)
- Odoo CRM
- Odoo Sales
- Odoo eCommerce
- Odoo Project
- Odoo Multi-Company / Multi-Entity Configuration

Hardware Options

- PAX A77
- PAX A920 Pro

---

5. Operational Processes

Transaction Methods

- Card-present (in-store) payments via WAS-approved PAX terminals
- Invoice payments (card-not-present / pay-by-link)
- Tokenized customer payments for repeat use
- Recurring / subscription payments
- Multi-channel payments across POS, invoices, and subscriptions

Reporting Overview

Odoo Reports

All reports can be filtered to show specific date periods, store locations, users, products, transaction statuses, etc.)

Report Types	Description of Report
Sales Report	Shows sales orders, revenue, and trends over time to help track overall business performance.
Invoice Report	Provides visibility into issued, paid, unpaid, and overdue invoices for accounts receivable tracking.
Payments Report	Displays payments collected, payment methods used, and transaction status synchronized from WAS.
Customer Aging Report	Breaks down outstanding invoices by aging buckets to identify late or at-risk balances.
Profit & Loss (P&L) Report	Summarizes revenue and expenses for a given period to measure profitability.
Balance Sheet	Shows assets, liabilities, and equity to provide a snapshot of financial health.
Tax Report	Reports taxes collected and owed by jurisdiction to support filing and compliance.
POS Sales Report	Tracks in-store sales by location, register, product, or cashier.
Inventory Valuation Report	Shows current stock value based on inventory movements and costing methods.
Inventory Movement Report	Tracks product movement across warehouses and locations.
Product Performance Report	Analyzes sales volume and revenue by product or service.
Subscription Revenue Report	Displays recurring revenue, renewals, and subscription performance (if subscriptions are enabled).
Payment Reconciliation Report	Compares invoices, payments, and settlement data to simplify reconciliation.
Multi-Company Consolidated Report	Provides consolidated financial reporting across multiple entities or locations.

Elevate Reporting and CyberSource Reporting are also available. See the Payments 101 section for further details and what reports can be generated.

Operational Constraints

Constraints vary by software tier and enabled features.