Click-and-Collect / BOPIS

User Guide · Odoo 18.0 & 19.0

Reserve online, pick in store, collection-ready notify and ID check for BOPIS

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1. Overview

Click-and-Collect / Buy-Online-Pickup-In-Store (BOPIS) Workflow ==========
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A complete in-store collection workflow that turns any sale order into a trackable click-and-collect order. Customers reserve online, store staff pick and stage the goods, the customer is notified the order is collection-ready, and an optional ID/proof check is enforced before handover.

Key capabilities ---------- * Per-store collection points with opening hours and capacity limits. * Reservation -> Picking -> Ready -> Collected lifecycle with full audit trail. * Automatic collection reference codes and customer notifications. * Optional ID verification step (name match, document type, reference). * Collection slot booking with capacity guard per point and per slot. * No-show and expiry handling that releases reserved stock. * Dashboards and reporting on collection lead time and no-show rates.

2. Installation

Open Apps, click Update Apps List, search for “Click-and-Collect / BOPIS” (technical name **gb_click_collect_bopis_workflow**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Click & Collect
- Collection Orders
- Configuration
- Collection Points
- Slots

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
cc.collection.point	Click & Collect Collection Point
cc.collection.order	Click & Collect Collection Order
cc.collection.slot	Click & Collect Time Slot
cc.collection.wizard	Handover / Collect Wizard

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.