



odoo

About The Publisher

Cybrosys is a proven and well-established ISO Certified software development company which provides quality services all over the world. We have been providing reliable software services across different sectors of the software industry since 2008. Cybrosys has established its presence around the world within a short span of time. Now we serve our widespread customers around the globe via our offices located in London, Dubai, Bangalore, Kochi and Calicut. Our partnership with technology leaders like Microsoft, Sun, IBM, Symantec, and Odoo assist us to deliver high quality software solutions to our diverse customer base.

ERP solutions being our core area of service, we perform Odoo ERP customization, implementation, and allied services. Along with that, we are also into Source code sale, Custom software development, and Employee outsourcing. Earlier with our own proven ERP suite, we hit the market, however, later our focus turned towards more affordable open source solutions. Cybrosys has been a reliable and trusted service provider of Odoo at the beginning itself and our expertise have made Odoo even more user-friendly. Our uncompromised and user oriented services in the field of Odoo implementation and customization keep us distinguished among market players

“Never compromise on your needs, when we can assist you”

CEO's Message

"Hard work always pays dividend, sooner or later"

It's been a long journey since we established Cybrosys. We have seen tides of growth and decline during the voyage. But we endured everything, and here we are, as one of the fast growing player, constantly striving to be better. It is always been the crew, their perseverance and efforts, that lead us forward. And we never gave up on our mission, in fact our mission steered our drive.

Associating with Odoo was a bold step to comply with our mission –“Develop most reliable cost effective software based on innovation and creativity”. And when we look back, what we see is the happy faces we served and the milestones we passed.

When we launch a product manual like this to assist end users, I do like to quote the second half of our mission that is, “most of all we value our existing customers and continued customer satisfaction”. In this occasion I would like to express my sincere gratitude to all the team members who worked behind this work. And I wish the work be an excellent guide to all Odoo users.

Sainul Abideen

CEO, Cybrosys Technologies

Preface

In the beginning, it was 'Tiny ERP' then changed to 'Open ERP' and now it is 'Odoo', the change in name has affected Odoo in many ways, especially created a confusion among users. But every time the team has managed to rectify the issue and they were successful in it. In the new makeover, the ERP has undergone many defining changes and 'Odoo' is a brand new professional ERP software now. Even though there are many dedicated documents on the internet about Odoo and its functionalities, we found that a comprehensive material covering almost all important aspects of a 'brand new ERP' software is not anywhere. In other words, there is no one-stop reference covering the questions like, why an ERP, Why Open source, ERP, and present business environment, Why Odoo and what are its functionalities etc.

In the recent pasts, Odoo has been witnessing high customer demand from all over the world. As more users from different platforms coming into this system, service partners and community portals are also witnessing floods of queries about Odoo usage. When we analyze such queries in a broad sense, we can understand that the underlying problem is lack of a comprehensive guide. The bits of information scattered over internet is not much helpful to all users', especially new Odoo customers. But the interesting thing is that Odoo is one of the simplest ERP solutions and it can be easily managed by any type of user.

In this book, we tried to cover all such topics a user must read in current context. This book is neither a typical user manual nor an installation and operation guide, rather a comprehensive guide which will give a user an overall outlook about Odoo ERP. After going through this book you will get an understanding of main features and functionalities of Odoo, and of course, it will give you a step by step guide to configure and use Odoo. All major modules of Odoo ERP, its workflow, main features of the modules etc. are included in the book for a better customer understanding. Each section of the book is prepared considering the ultimate business user in mind.

As an experienced service partner and community supporter, Cybrosys has made an appreciable contribution to Odoo. Our developers and resource persons are actively helping different types of users every day. The insight and confidence we got from such experiences prompted us to come with a work like this. And we have deployed our best hands to do the job. We believe this is an essential guide for any customer irrespective of their familiarity with the System. We look forward to the feedback from users, so we can improve and add more useful information to this document in upcoming versions.

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ERP in New Business Era

The word ERP (Enterprise Resource Planning) and ERP software are not new to the business world. Since the advent of computer itself, different types of business management software was available. It was in late 90's, more advanced, integrated and efficient business management solutions emerged in the market called ERP solutions. In simple words, ERP refers to the systems and software packages used by organizations to manage their day-to-day business activities, like accounting, manufacturing, Sales, Purchase, Customers, and Inventory etc.

Though initially ERP usage was confined within large enterprises, today it is an inevitable factor in any business organization. Yearly, more and more business organizations are attaching ERP solutions to manage resources more effectively and they are reaping its fruit. The Classical module like Accounting, Inventory, and Manufacturing, was the primary component in earlier ERP solutions. However, the landscape is entirely different today and changing constantly. Today, an efficient ERP solution incorporate functionalities like E-Commerce, M-commerce, Data Analysis, Decision making, Cloud storage and Management, Remote Controlling etc. In other words, today's ERP is more like an intelligent decision taking system rather than a decision support system as it were. Integrated modules and cutting-edge analysis tools combined with huge possibilities of internet impart such enormous capabilities to an ERP system.

So, what are the advantages of having an efficient ERP software in your organization? It would be worth analyzing it in today's business environment.

- Increased productivity.
- Efficient management
- Integrated information
- Better analysis, Forecasting and Reporting
- Improved Security
- Mobile accessibility (Access and control your system from anywhere)
- Accurate Decision-making
- Scalability (customization meeting your changing needs)
- This list will go further if we tried to analyze each point in depth.

It is obvious from the listed points that an efficient ERP will enhance competence and productivity of any organization. So it is important to know different types of ERP solutions available in the market. There are many ERP solutions available in the market and they can be grouped into following categories for better understanding.

Proprietary ERP

In simple words, proprietary ERP software means, an ERP solution developed, delivered and supported by a private company. Oracle, SAP, Microsoft Dynamics etc. are some examples of such software.

Open source ERP

Open source ERP is a system whose source code is made publicly available. The open source model allows companies to access the ERP system's code and customize it using their own IT department instead of paying extra for vendor customization services and licensing, as is typically the case with closed source programs[1]. Generally software in this category is free.

Odoo, ERP Next, Dolibarr etc. are some examples of Open source ERP software.

Cloud based

Traditionally, ERP and other business productivity software is located on premises, meaning your company is responsible for purchasing, housing, and maintaining the software and all related hardware. But Cloud ERP is a software that is accessed in “the Cloud” – using the Internet to access servers that are hosted remotely from your business. Nowadays more and more ERP providers (both open source and proprietary) are offering this facility to their customers.

Open source and Proprietary ERP- An analysis.

There are many Open source and Proprietary ERP solutions available in the market. Having a better understanding of these two types of software is good as far as your business needs are concerned.

Coast

Generally, Proprietary ERP solutions are costlier than Open source solutions. Hence it is affordable to organization irrespective of their size.

Dependency

With proprietary ERP solutions, you are dependent on the service provider for all help. Whereas in Open source you are not locked with it.

Features

Today, both Open source and proprietary ERP solutions are able to provide almost all advanced features

Customization

Compared proprietary ERP, Open source is more customizable to individual business need.

Support

Unlike in the Past, active community support and availability of more service partner are keeping open source solution on par with proprietary services.

Upgrades

Upgrades and new features make an ERP competent in business environment. Both proprietary and open source solutions provide updates but we must admit that, the frequent developments in open source systems are far better than others.

Open Source ERP

What is Open source?

Open source, as the name indicate it is an open platform in the field of software technology. According to a widely accepted definition, open source software means a computer software with its source code made available with a license in which the copyright holder provides the rights to study, change, and distribute the software to anyone and for any purpose [2].

In historical perspective, open source software's genetics dates back to 70's when elementary software's were developed. Initially, all software products were open source in fact. Programmers shared and co-developed source codes and developers benefited from each other by it. But late with the commercialization of software products like any other commodity, software and its source code became less shared and protected by IPR. In the beginning, commercialization put a setback to open source movement, but with the advent of internet the movement again got momentum and advanced even faster. Today, open source software displays stiff competition to proprietary products with its leading presence and uncompromised performance in all arena of software solutions.

Open Source ERP

Fully fledged business management software and ERP solutions were available on the market by late nineties itself. But most of them were in proprietary category. Fully fledged Open source ERP solution came into the market by 2002 and consequent years. Initially, such software were not much popular as the major proprietary players lead the industry. But later, increased online community support and inherent strength of open source technology pushed the industry forward. More and more customers attracted towards open source platform as it provided more ROI. Especially, SME sector attracted more towards this affordable service providers.

According to market research, proprietary ERP solutions still leads the market in monetary terms [4], yet Open source customer base is steadily increasing. It is obvious from the facts that, despite higher market share in monetary terms, proprietary software are facing stiff competition from more affordable open source solutions. Today, you can find all the features a proprietary ERP provides is there in open source ERP also. In fact, open source community is constantly incorporating more outstanding features to open ERPs.

Different ERP's have different set of features in their bag. Following are some essential features an ERP must have in today's business environment and you can find these features in almost all modern open ERP software.

- E-commerce module
- Cutting-edge analytical tools
- Remote control
- Cloud support
- Social media integration
- Easy customization
- Support and Upgrades

How open source ERP works?

Unlike any other software, the real challenge in ERP is ensuring further support and timely upgrades for your ERP suite. This is where most of the customers are forced to choose a private player rather than an open source solution. But in today's context, open source ERP solutions rectify such problems with the help of active online community as well as paid service partners. Moreover, different versions of ERP (like Enterprise and Community in case of Odoo) make it easier for customers to ensure their future support more wisely. Cloud-based ERP software services are also making now things easier for open source ERP.

Trending open source ERP's in market basically provides following implementation options for their customers.

- **Company direct implementation, and services.**

In this case, the developer company directly gives ERP implementation and future support to customers. Usually, cloud-based ERP is provided and they will charge for it accordingly.

- **Service partners**

All open source ERP companies have authorized service partners across the globe. They provide all the assistance needed for a customer on a variable cost.

- **Free version.**

You can download and configure ERP your own. No fees and extra cost. But you can seek help from the online community for any assistance.

Apart from this, a lot of other options are also available depends on the software provider. Customers can choose an implementation plan according to their convenience.

Open Source ERP examples

Odoo

Odoo is an all-in-one management software that offers a range of business applications that form a complete suite of enterprise management applications targeting companies of all sizes. Odoo is an all-in-one business software including CRM, Website/e-Commerce, billing, accounting, manufacturing, warehouse- and project management, and inventory. [3]

Openbravo

Openbravo is a retail-focused ERP based on a modular system. The software comes in three types. Openbravo Community edition which is free release and paid Enterprise and Professional editions. [3]

ERPNext

ERPNext is an open source solution designed for small and medium businesses (SMBs). The software is a collection of apps and plugins. [3]

iDempiere

iDempiere is a full-fledged ERP, with everything from invoicing to POS integration to warehouse management to forecasting. While iDempiere is open source, installing an ERP is never truly free. [3]

xTuple PostBooks

xTuple makes a range of ERP and manufacturing-focused products, but the core of all these options is PostBooks. PostBooks manages the central functionality of an ERP, which is extended by xTuple's other offerings. [3]

Odoo as an ERP solution

'Expand as you Grow' the tagline from Odoo conveys a lot to its customers. Started in 2005 by open source enthusiast 'Fabien Pinckaers', Odoo is now one of the leading open ERP providers across the globe. Started in the name 'Tiny ERP', and later as 'Open ERP ', Odoo endured many adversaries before securing its present status. In the beginning, Odoo released everything for free. But later they have adopted a different business model in which the software and source code is still free, but customers have to pay for services provided by the Odoo service partners. The paradigm shift has brought enormous qualitative changes to Odoo. Odoo became powerful and user-friendly in consequent years and expanded its customer base, partner network, and community support [6]. And today with 2million+ customers and 730+ partner network, Odoo is one of the fastest growing open ERP solution in the world.

A bulky software with higher cost is the first thing comes to a person's mind while thinking about an ERP solution. But open source technology and new developmental methods have changed the picture altogether. Odoo is one of the simplest ERP solution available and you can witness it from the design of each module. In Odoo, each module is a separate app that can be installed to your database. That is where the word 'expand as you grow' is relevant. You just have to install the modules you needed most, and when you install a new module it will automatically integrate with your existing modules and start working.

Why Odoo

Comprehensive yet Simple to Use

The 5000+ modules and apps it provides make Odoo a powerful ERP. There is always a solution for your any type of need. But this bulkiness will not reduce system performance, as the user has to install needed modules only.

Highly updated and Regular Upgrades

Odoo is a business solution that is designed to meet present as well as near possible business needs. Other than the classical modules like Accounting, Manufacturing, Sales etc. E-commerce, M-commerce, Business intelligence, Cloud assistance and more other modules make Odoo the need of the hour.

Another widely appreciated feature of Odoo is that it is based on a technology stack that is modern and up-to-date. These technologies continue to be developed and adapted to the latest paradigms [5].

Customizable and Scalable

Since it is an Open source solution, you can customize Odoo to meet your changing needs. Either you can customize yourself or you may seek a service partner's assistance for more sophisticated customization. Odoo Apps are another feature which keeps Odoo on top. The customer can access 10000+ free and paid apps from Odoo app store to add features to their software.

Any Business with Less Cost

From large enterprise to small organization, Odoo can serve any type of customer. It is simply customizable to cater any type of user needs. Similarly, the cost associated with it is affordable to any type of customer. If you need it for free, download and use it. If you need a service partner to assist then find an affordable hand from your locality.

Strong and Active Community

What makes Odoo an exception to other ERP solutions is its continued strong community support. With 20000+ members and developers, Odoo community is one of the best Open ERP community in the world. You can find help on any of the issues from Odoo community portals.

Business Intelligence

Odoo is not a conventional decision support system, rather it is more decision-making system. Various reports and analysis available in Odoo make your decision making simpler. And nowadays more AI apps and plugins are being contributed to Odoo App store, which in turn enhance the overall system capabilities.

Introduction.

Free as in "freedom", not free as in "free services", this is the tagline presented by 'Fabien Pinckaers' (CEO, Odoo S.A) while adopting the new business model for open source ERP, Odoo. Thanks to such a visionary thought, without it, the idea of a game-changing open source ERP wouldn't have become a reality. Freedom to see, freedom to change, freedom to use, everything based on user's needs. That is the freedom offered by Odoo. You can acquire, customize and use an excellent ERP solution for free. Even a normal non-technical person can perform such operations. But we need a starting point, where to start and how to configure, how to customize up to your requirement etc. must be answered first.

The following sections of this book will make you intimate with the system. In this introductory part, you will get to know about different ways to acquire Odoo. The first module of this book will explain how to set up the database of your ERP and manage it. It will also provide guidelines to set up different users with different access rights to manage the system. In the next section onwards the book will guide you to each module of Odoo in a detailed way. There you can find basic configurations, general operations and other important and advanced option to run each module.

Basically, there are two versions of Odoo ERP available namely Community version and Enterprise version. While community version provides almost all the necessary features, later can provide more advanced options. You may acquire Odoo ERP solution through any of the following ways.

- **Online version** – In this case you get online access to Odoo ERP Enterprise version. And all your data and operations are managed online. Here Odoo Company directly gives you all the services needed.
- **Direct download** - You can download, customize and start using Odoo (Community version) your own. And you can access services and other helps from community portals. You may get the help of a service partner if needed.
- **Via Service Partner (Enterprise or Community version)** – you can seek the help of an authorized service partner to implement and customize Odoo for you. However, the service partner may charge you according to service. You may choose either Enterprise or Community version depends on your need.

Once you have acquired Odoo through any of these ways, the next step is creating your database (The detailed steps are described in this book). Actually, all the modules are independently organized in Odoo. In order to access a module, you must install that particular App from Odoo apps. But once it is installed, it automatically integrates with the whole system.

Core Modules of Odoo

Accounting and Finance

Simple yet powerful, Odoo Accounting module can be best described in these two words. You can process your transactions quickly using Odoo. Odoo's accounting is connected with all other apps of Odoo like Sale, Purchase, inventory and Human resource. This makes working with Odoo more simple and quick. You can create a customer invoice by less than two clicks from a Sale order. (Check Sales for more details). Odoo will fill all the necessary information required for invoice automatically. To enable accounting features in your Odoo ERP you have to install Accounting and finance App from Odoo.

Customer Relationship Management

Integrated with Sales, Purchase and other modules, Odoo CRM effectively manages customer relation operations for you. Actually, Odoo CRM is a combination of about 8 Apps and plugins. View CRM module for a detailed explanation.

Purchase

Just like the sales, it is really easy to manage our purchase related operations using Odoo. We can generate quotations, convert them to purchase order and generate bills in simple steps. Illustrated reports generated by this module makes analysis even simpler. After installing the purchase management module from the apps list, we can see the menu item 'Purchases' in our Odoo ERP.

Warehouse Management

Track all the movements of products more effectively, generate automatic sales order and manage scraps in easy steps and lot more other features. Install the module 'Inventory' to enable warehouse management.

Manufacturing

For any manufacturing company, it is important to track products and every manufacturing orders efficiently. The Manufacturing Module in Odoo help you to handle the complexity of Production, Manage Bill of Materials, Plan Manufacturing Orders, and Track Work Orders etc. Manufacturing module is one of the basic application in Odoo. After a successful installation of Odoo, we can find the Manufacturing app in apps. Since the manufacturing is highly integrated with Inventory Management, you can keep your inventory automatically updated with each manufacturing process.

Human Resource

For an efficient HR management using Odoo, you have to install following apps from Odoo. That is, Timesheet, Employee Directory, Leave Management, Recruitment Process, Expense Tracker, and Attendants. One of the useful features of Odoo HRM module is the automation of recruitment process with the help of the website.

Point of Sale Management

The Simple and user friendly interface of Odoo Point of sales module let the user to configure and complete his all POS needs with hassle free steps. You can install POS app from Odoo to enable this module. Like other modules, POS is also integrated with Inventory, Accounting and CRM modules thus providing live updating and efficient management.

Website and E-commerce

Odoo is always ahead of user needs. Website and E-commerce is such a novel feature. You can make your own website and carry out E-commerce activities without depending on other third-party apps. Website also plays a big role in many other modules.

Project Management

Project Management is a collection of guided process to achieve a specified target. That may include initiation, planning, assignation, controlling, analysis and closing. Project management app is one of the powerful tools in Odoo. Where we can run all projects with user-defined workflow. To enable project management functionalities in Odoo, you need to install Odoo Project App.

The following pages will give you an exact idea about Odoo and its modules.

Basic Configurations of Odoo

You can acquire Odoo through any of the methods mentioned in the previous chapter (i.e. Introduction). The very next step is setting up your database. Whether you are using online version or onsite version, you must create your database first. It is in this Database all your data and operations are performed. You can create multiple databases if needed, and you can have different administrators for each of them. An administrator account (super user) will be created automatically when you create your first DB. This Administrator account is very important as he enjoys complete control over ERP system. Odoo provides an extra level security called Master Password to protect your database from unauthorized modifying. You may have multiple databases and administrators but only the administrator with Master Password can modify the entire database. Once you have configured a database, Odoo provides the option to delete, Backup, Restore the databases. Backup and Restore option is a useful feature provided by Odoo to protect your database.

After setting up your database, it is time to install the modules you needed from Odoo Apps. In upcoming chapters, you can find the detailed description about the apps you need to install to run a module.


In the next step, you have to create the system users. System users mean all the persons who can login and access different sections of ERP. For example, accountant, project manager, section head, department head, team lead etc. This depends upon the business and organizational hierarchy you run. Obviously, you can set access restrictions on this users. The menu and settings visible to each user are based on the access right he possesses. For example, the menu to create a manufacturing order will be visible to a user with 'Manager' privileges in manufacturing. In each module, Odoo by default provides at least two type of users with different access permission. However, the administrator can grant custom permission to these users if needed. In fact, admin can create a user with custom privileges. Another useful feature you can find in Odoo is the 'Group'. You can add multiple users under a Group and apply access restriction on the group. In other words, if you have a lot of users to manage, then the group is an efficient method.

Odoo has multilayer security system. At the top level, the administrator can restrict an individual user from accessing any module or application in Odoo by using Access Right mechanism in the user profile. Further down, the administrator can Impost Read, Write, Delete, Create permissions on Groups (i.e. any Department or a group of people) using Access control to fields. Record Rules is another feature to establish customized security.

Database Management

Create Database

When we install Odoo in our system we automatically redirected to **database creation** page. In that page, Odoo provides basic instructions for creating your database.




Odoo is up and running!
Create a new database by filling out the form, you'll be able to install your first app in a minute.


Database Name


Email

Password

Language **Country**





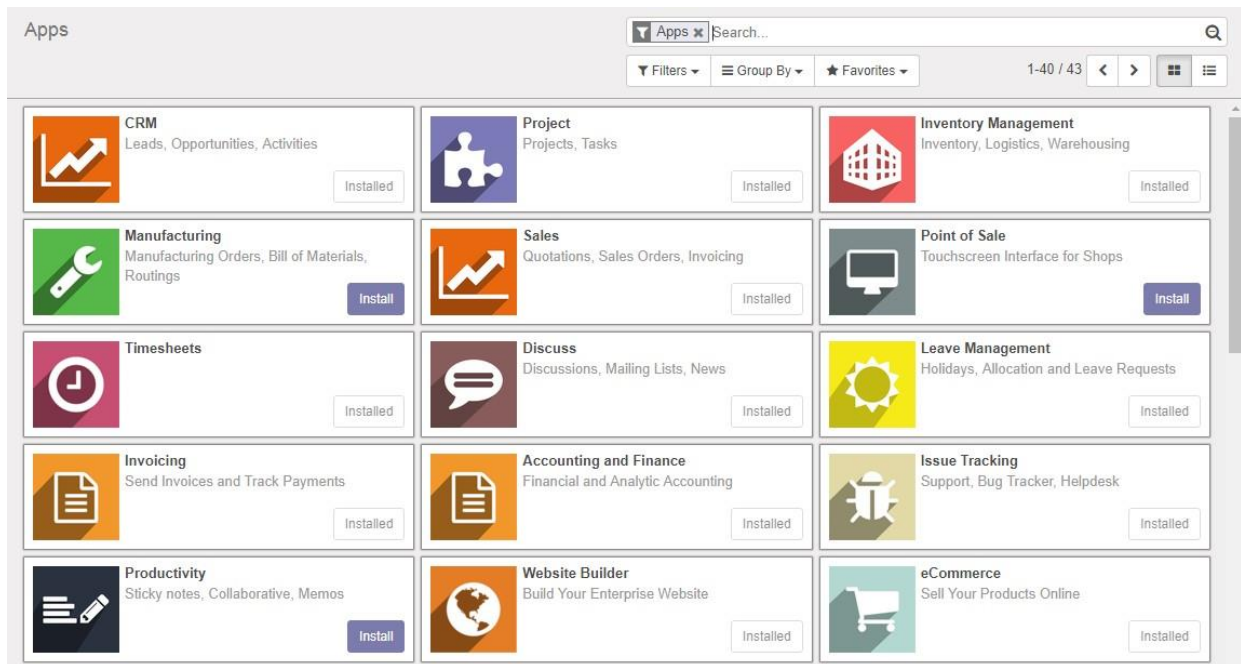
☐ Load demonstration data (Check this box to evaluate Odoo)

[Create database](#) or [restore a database](#)

Note: - Tick the checkbox **Load Demonstration** data to fill your apps with sample data.

Click <**Create Database**> and you will be redirected to Odoo Apps. You can see the Apps from the app list, install any module according to your need.

Note: - You can create any number of database later from the same window.



Delete Database

- **Manage Database -> Delete**



Crm_db	Backup Duplicate Delete
HRMS_Inventory	Backup Duplicate Delete
Hotel_management_10	Backup Duplicate Delete
autoline_test_10	Backup Duplicate Delete

Backup and Restore Database

To Backup a Database

Backup Database ×

Database Name

Backup Format

Backup

- **Manage Database -> Backup**
- Select the Backup format and click on **<Backup>**.

To Restore a Backup, Follow the steps

- **Manage Database -> Restore**

Choose the database to be restored, Give the database a new name and click on **<continue.>**

Restore Database ×

File
 odoo_doc_20...6-56-51.zip

Database Name

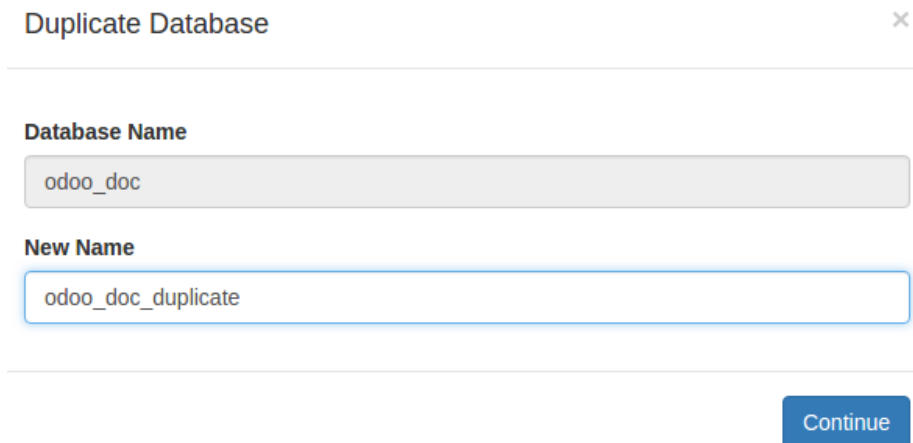
This database might have been moved or copied.
In order to avoid conflicts between databases, Odoo needs to know if this database was moved or copied. If you don't know, answer "This database is a copy".
☒ This database is a copy
☐ This database was moved

Continue

And after successful restoration we can see the restored database listed in the database management page.

Duplicate Database

- **Manage Database -> Duplicate**



Duplicate Database

Database Name

odoo_doc

New Name

odoo_doc_duplicate

Continue

And After a few seconds, we can see the duplicated database in the database list.

Master Password

Master Password is the key-stone element which controls entire Odoo Databases. Database creation, deletion, duplication etc. actions can't be performed without the master password. So it is advisable to create a strong master password for your Odoo system.

USER Management

Types of user

Basically, there are two types of user in Odoo ERP, Administrator, and normal user. **Administrator is the default user created at first** and he has complete access over Odoo system. As the administrator of your database, you are responsible for its usage. This includes the Apps you install as well as the number of users currently in use etc. **Admin can create as many as users and assign their permissions and access rights within the application.** By this method, admin can create organizational hierarchy and restrict users only to their own domain.

Creating user

- Login to the system as administrator
- **Settings -> Users -> Create**

The screenshot shows the 'Users / New' form. At the top, there's a breadcrumb 'Users / New' and two buttons: 'Save' and 'Discard'. Below that is a 'Change Password' button. The main form area is divided into sections. The first section has a profile picture placeholder, a 'Name' field, an 'Email Address' field, and an 'Active' checkbox. Below this are tabs for 'Access Rights', 'Oauth', 'Preferences', and 'Point of Sale'. The 'Multi Companies' section has 'Allowed Companies' and 'Current Company' dropdowns. The 'Application' section has dropdowns for 'Sales' (Manager), 'Project' (Manager), and 'Inventory'.

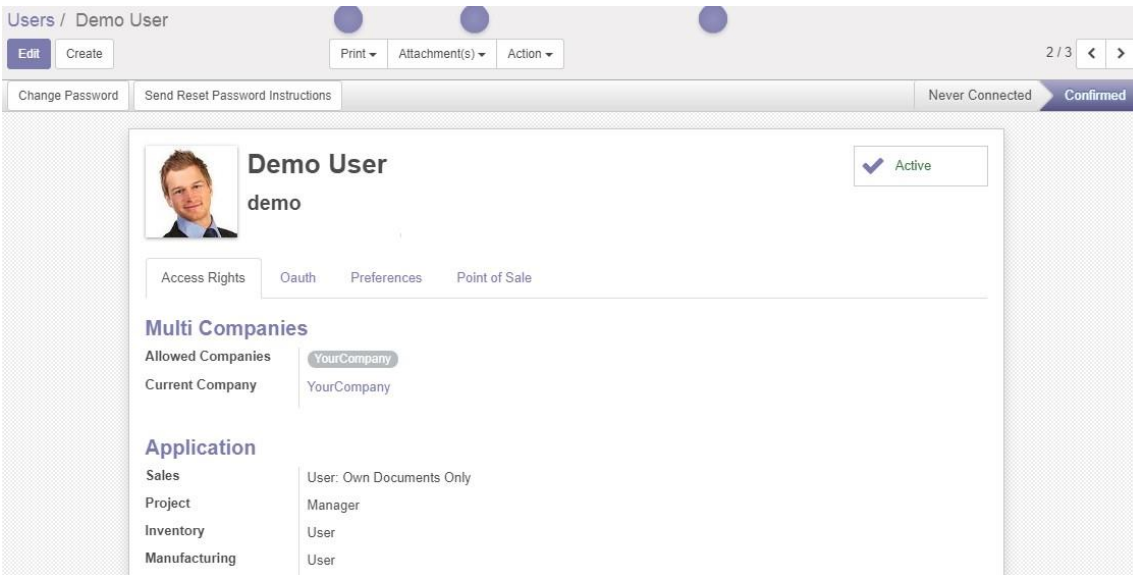
- Fill the field with user information
- Set **Access Rights** to each application for the user from dropdown
- Find more customization for the user in 'Oauth', 'Preferences', 'Point of sale' tabs.
- '**Change Password**' button can be used to set a password for the user

Note: - you can restrict a user from accessing a particular application by changing **Access Right** for that application from above form.

Note: - Admin can edit any user details from the same menu (i.e. **More->Settings->Users**) by Clicking on the user name from list.

Delete User

- Login to the system as administrator
- **Settings -> Users**
- Select a user from list



- **Action->Delete**

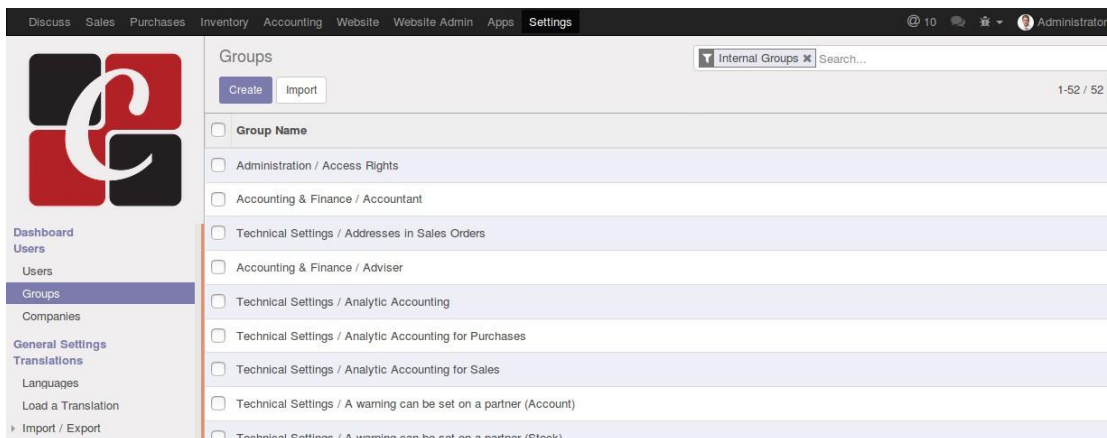
Note: - Admin can perform other tasks like 'Edit user info', 'Duplicate' user etc. from the same window.

Groups

Groups are very important security modules in Odoo. They are created to achieve **organizational hierarchy as well as impost access control to a group of users**. Admin can set access control for a group of people rather than an individual.

Assign user to groups

- **Settings > Groups**



Once you know about groups, you can select groups from list of groups as shown in above figure.

Application	Inventory	Name	Manager
Portal	<input type="checkbox"/>	Share Group	<input type="checkbox"/>

Users	Inherited	Menus	Views	Access Rights	Rules	Notes
-------	-----------	-------	-------	---------------	-------	-------

Name	Login	Language	Latest connection
Administrator	admin	English	07/20/2017 10:57:28

Here you can add as many as users under the Users tab so that all the security rules in that group will be applied to the user. **Access Rights** and **Rules** are very effective methods to implement security measures in Odoo, they are discussed in coming pages.

External user Sign Up

What if we wish to allow an external user (like your client) to view something in your system. He can sign in to your system and view allowed areas. To enable this settings.

- **Settings -> General Settings**

The screenshot shows the Odoo General Settings page. The left sidebar contains links for Dashboard, Users, Companies, General Settings, Translations, and Load a Translation. The main content area is titled 'General Settings' and includes a description: 'You will find more options in your company details: address for the header and footer, overdue payments texts, etc.' with a link to 'Configure your company data'. The settings are organized into sections: Email, Portal access, Authentication, Import / Export, Multi Company, Multi Currencies, and New users access rights. In the 'Portal access' section, the 'Activate the customer portal' checkbox is checked, and the 'Allow external users to sign up' checkbox is also checked. Other checkboxes like 'Enable password reset from Login page' and 'Use external authentication providers (OAuth)' are unchecked. The 'Import / Export' section has 'Allow users to import data from CSV/XLS/XLSX/ODS files' checked. The 'Multi Company' section has 'Manage multiple companies' unchecked. The 'Multi Currencies' section has 'Allow multi currencies' unchecked. The 'New users access rights' section has 'Edit default access rights for new users' as a link.

Under The **portal access** there is a check-box indicated **Allow external users to sign up** .Tick that checkbox and click on **<Apply>** button. Now you can see a signup option is enabled near login portal



Database

odoo_doc

Select 

Email

Password

Log in

[Sign up](#)

[Manage Databases](#) | Powered by Odoo

Click on **<Signup>** and you will be redirected to a new Sign Up page.



Your Email

example

Your Name

External user

Password

•

Confirm Password

•

Sign up

[Back to Login](#)

[Manage Databases](#) | Powered by Odoo

Security Rules

Other than the access permission applied during the profile creation, admin can make use of following security measures to achieve high-level system security.

Access control to fields

In Odoo, all menus and views are not viewable to all users, by default only administrator has the permission to view and control all the fields and views. Following are the major access levels an administrator can enforce on **Groups**. For example if you want to restrict some users in inventory from editing inventory details such settings can be established with this option.

1) perm_read

If this is set, it means that all users that are in this group have read access on this model. If it is not set, it means that the users don't have read rights.

2) perm_write

If this is set, it means that all users that are in this group have write access on this model.

3) perm_create

If this is set, it means that all users that are in this group have create access on this model.

4) perm_unlink

If this is set, it means that all users that are in this group have delete access on this model.

This settings can be found on following tabs

- **Settings > Groups > Access Rights**
- **Settings > Groups > Rules**

Name	Login	Language	Latest connection
Administrator	admin	English	07/20/2017 10:57:28

Record Rules

This control mechanism is applied when we need more customization in access rights other than the one which are available. These are generally done by technical persons.

- **Settings > Security > Record Rules**

A record rule has:

- A model
- A set of permissions (e.g. if perm_read is set, the rule will only be checked when reading a record)
- User groups (no group means global rule)
- A domain for filtering data (If filter matches: It is accessible, If filter does not matches: It is not accessible)

The screenshot displays the configuration page for a record rule named "All Leads Analysis". The interface is divided into several sections:

- General:** Contains fields for Name ("All Leads Analysis"), Object ("CRM Opportunity Analysis"), and Active status (checked).
- Access Rights:** A grid of checkboxes for permissions: Apply for Read, Apply for Write, Apply for Create, and Apply for Delete, all of which are checked.
- Rule Definition (Domain Filter):** Shows a filter expression: `[(1,'=',1)]`.
- Groups (no group = global):** A toggle switch for "Global" is turned on. Below it, a table lists the groups affected by the rule:

Group Name
Sales / User: All Documents
- Interaction between rules:** A text block explaining the logic of global and group-specific rules, followed by a detailed algorithm and an example rule expression: `GLOBAL_RULE_1 AND GLOBAL_RULE_2 AND ((GROUP_A_RULE_1 OR GROUP_A_RULE_2) OR (GROUP_B_RULE_1 OR`

Accounting and Finance

Simple yet powerful, Odoo Accounting module can be best described in these two words. You can process your transactions quickly using Odoo. Odoo's accounting is connected with all other apps of Odoo like Sale, Purchase, inventory and Human resource. This makes working with Odoo more simple and quick. To enable accounting features in you Odoo ERP you have to install Accounting and finance app from Odoo Apps.

There are many things which make Odoo a unique product than any other ERP Accounting modules. When we compare Odoo Accounting with other ERP suites like Microsoft Dynamics and NetSuite we can see many features which Odoo alone have. For example, Quick reconciliation, Automatic Sync, Batch Send, Third party follow-up, Payment automation, Alerts, and Expenses etc. features can be found in Odoo. But neither NetSuite nor Dynamics support all of these features but only some of them. Since all accounting transactions are associated with customers or suppliers, you get reports to perform analysis per customer/supplier such as the customer statement, revenues per customers, aged receivable/payable etc. Another exemplary option available in Odoo is its business intelligence engine which will allow you to navigate through company data in more organized manner. The graphs and diagrams plotted by BI engine is indeed a useful tool in decision making. Of course, Odoo is mobile too. You can use it to check your accounts on the go.

Following is the way Odoo deals with typical accounts and transactions.

Double-entry bookkeeping

Odoo automatically creates all the journal entries for each of your accounting transactions and Odoo uses double-entry bookkeeping system i.e. all journal entries are automatically balanced.

Accrual and Cash Basis Methods

Odoo support both accrual and cash basis reporting. This allows you to report income / expense at the time transactions occur.

Multi-companies

Odoo allows to manage several companies within the same database. Each company has its own chart of accounts and rules. You can get consolidation reports following your consolidation rules.

Multi-currencies

Every transaction is recorded in the default currency of the company. For transactions occurring in another currency, Odoo stores both the value in the currency of the company and the value in the currency of the transaction. Odoo can generate currencies gains and losses after the reconciliation of the journal items.

International Standards

Odoo accounting support more than 50 countries. The Odoo core accounting implements accounting standards that is common to all countries and customized apps are available to accommodate the specificities of individual country; like the chart of accounts, taxes, or bank interfaces.

Accounts Receivable & Payable

By default, Odoo uses a single account for all account receivable entries.

Wide range of financial reports

In Odoo, you can generate financial reports in real time. Odoo's reports include:

- Performance reports (such as Profit and Loss, Budget Variance)
- Position reports (such as Balance Sheet, Aged Payables, Aged Receivables)
- Cash reports (such as Bank Summary)
- Detail reports (such as Trial Balance and General Ledger)
- Management reports (such as Budgets, Executive Summary)

Import bank feeds automatically

Odoo makes bank reconciliation easy by frequently importing bank statement lines from your bank directly into your Odoo account.

Inventory Valuation

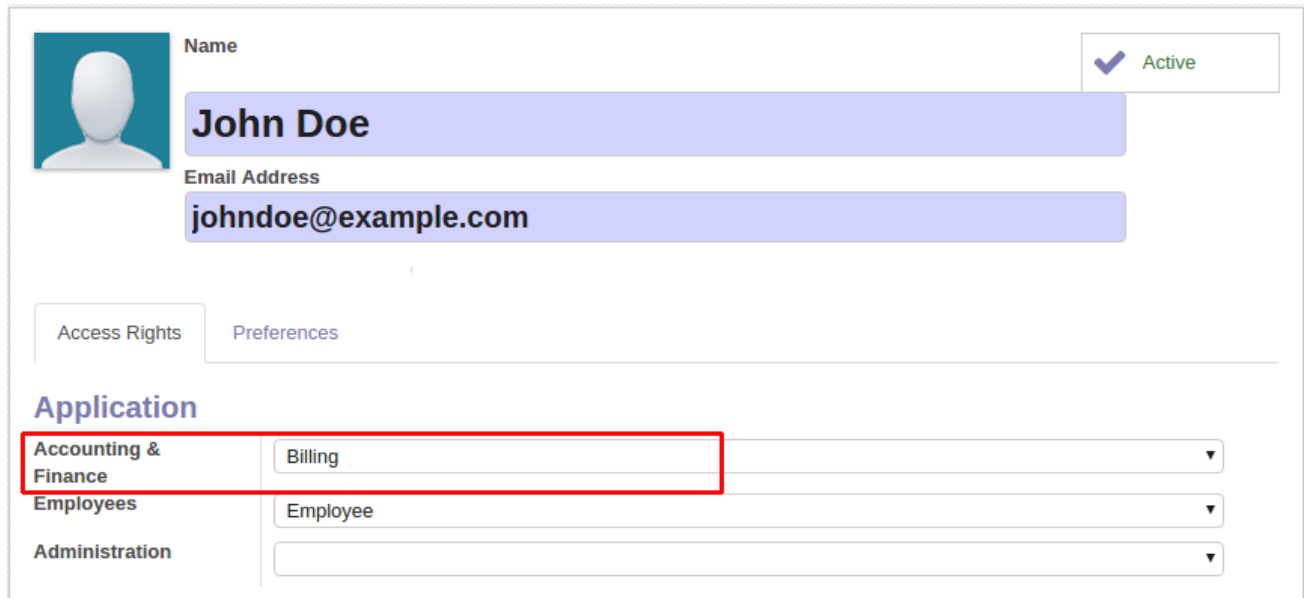
Odoo supports both periodic (manual) and perpetual (automated) inventory valuations.

Easy retained earnings

Odoo automatically calculates your current year earnings in real time; so that no year-end journal or rollover is required. This is calculated by automatically reporting the profit and loss balance to your balance sheet report. [7]

System Users

Basically, there are three types of users in Accounting module, who have different type of access right to the system.



Application	
Accounting & Finance	Billing
Employees	Employee
Administration	

- Billing
- Accountant
- Adviser

When we move from Billing Adviser, user will get more rights in application

- The main thing a user with only 'Billing' access right can do is create and process invoices.
- Billing user can also create new customers and vendors, Access product information, taxes, and fiscal positions.

This is all the menus available for a **'Billing'** user.

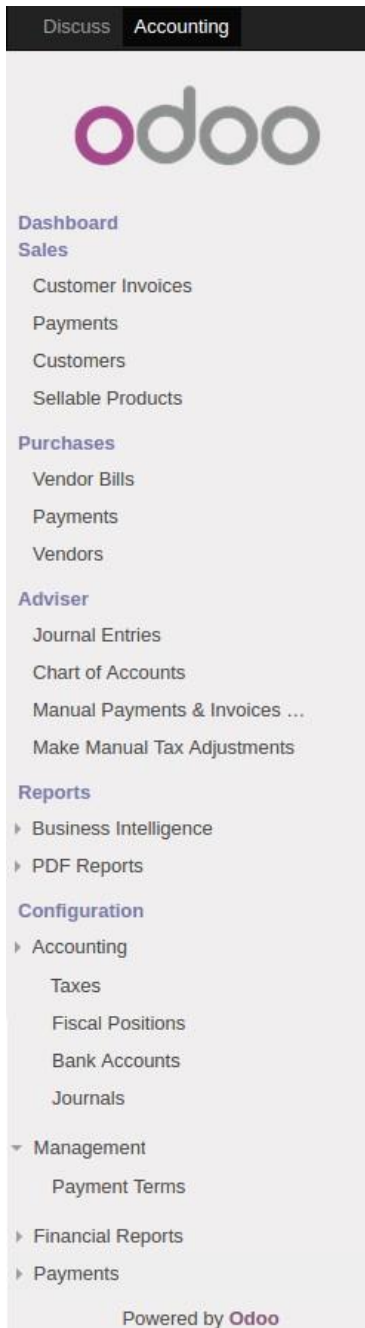


Next level of access right is '**Accountant**'. Along with the rights available for billing user, Accountant has more other rights.

- **Accountant** have access to dashboard of accounting
- **Accountant** can record payments from customers and vendors.
- He can generate all the PDF reports available.
- Also **Accountant** can configure financial reports.



- **Advisor** level user have more rights than any other users in Odoo accounting.



In addition to all the rights **Accountant** have,

- **Advisor** can create products and services, they can create journal entries, Manage chart of accounts, manual payments and invoice reconciliation, and advisor can make manual tax adjustment.
- **Advisor** level user can create new journals and new payment terms in Odoo.

Basic Configurations

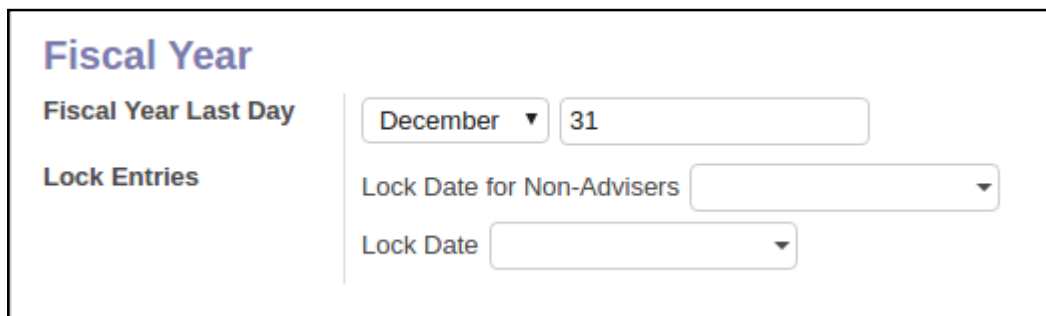
First, we have to set up general configurations of the Accounting system. You can find the basic and important configuration below.



Accounting>Configuration>Settings-> Chart of Accounts

Here we have selected the Indian chart of account. This is a Chart of account that comes along with Odoo. Odoo will automatically select Chart of account related to the country you selected while creating a database.

There is more than 50 chart of accounts comes with Odoo. You can choose as per your locality and need.



Accounting>Configuration>Settings-> fiscal Year

In this section we can set-up our financial year (Fiscal Year) related controls.

- From Odoo version 9 onwards, Odoo removed financial closing. But we can configure financial year last day

Lock Entries are to prevent editing accounting entries

Lock Date for Non-Advisers means a Non-Adviser level user cannot edit an accounting entry created on this date and prior. Usually, we use this for closing a period inside an open financial year.

Lock Date means, not even advisor level user can edit accounting entries created on or prior to this date.


So the benefit of this approach is we don't have to close financial year to get clean Profit & Loss and Balance Sheet report. Reports will be always up-to-date without closing and generating opening entries. It makes Odoo's reporting much easier and powerful.

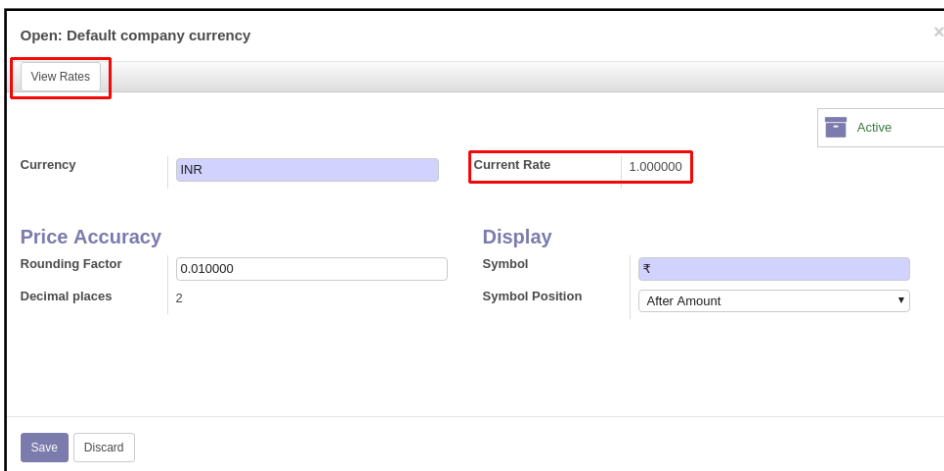
Accounting>Configuration>Settings-> Accounting and Finance



This section is very important.

This is where we are configuring what are the features we need in our Odoo accounting system. First thing is **Default Company Currency**.

- You can change the currency rate by clicking this  button. It will open a window like this



By clicking on '**View Rates**' button at the top, you'll see a list view of currency rates.

New / Currency Rates

Create

Import

▼ Filters ▼

≡ Group By ▼

★ Favorites ▼

<input type="checkbox"/> Date	Rate

Add the current rate of your currency here by clicking **<Create>** button.

Date

06/28/2017 05:30:00 ▼

Currency

INR

Rate

0.000000

Note: All the options those are labeled **Enterprise** as are available only in enterprise version of Odoo. We will not discuss those things here.

Accounting>Configuration>Settings

- **Analytic accounting.**

This feature can be used for many purposes like Manage Cost center concept, Invoice time spend on a task, Performance Analysis. This feature is also using for the budget management.

We will discuss these matters later

- **Asset management.**

Choosing this feature let you purchase your asset and manage the depreciation of those assets

- **Budget management.**

- **Allow Tax Cash Basis.**

Odoo supports both accrual and cash basis approach. This option allows your system to generate report in cash basis.

Accounting>Configuration>Settings>Multi Currencies

Multi Currencies

Configuration

☐ Allow multi currencies

Configuration

☒ Allow multi currencies

Rate Difference Journal

Exchange Difference (INR)

Enabling this option allows handling multiple currencies in Odoo. System will give a new option to select **Rate Difference Journal** when you **check** this checkbox.

If we receive payment against an invoice after a month of invoice creation, the exchange rate most probably changed. This **Rate Difference Journal** is used to create journal entry of loss or profit caused by the difference of currency exchange rate.

Accounting>Configuration>Settings>Invoicing and Payment

Invoicing & Payments

Customer

☐ Allow pro-forma invoices

☐ Enable payment followup management Enterprise [More Info](#)

☐ Use batch deposit Enterprise [More Info](#)

Warning

☒ All the partners can be used in invoices

☐ An informative or blocking warning can be set on a partner

Taxes

Default Sale Tax (standard)Input Excise Duty

Default Purchase Tax (standard)Output Excise Dut

Payments

[Configure payment acquiring methods](#)

Under this section, if you check **Allow pro-forma** invoices, it will let you set your invoices into a state called '*Pro-forma*'.

If you have to set up any restriction or a warning message for any partner while you create an invoice for him, select **An informative or blocking warning can be set on a partner** option under warning.

The tax selected as **Default Sale Tax** and **Default Purchase Tax** will be assigned as Customer Tax and Vendor Tax of a Product/Service When you create a new one.

Configure payment acquiring methods Button will redirect you to the list of all Payment acquires available in Odoo. You can install the payment acquirer from that list and you can also configure them.

Use Anglo-Saxon Accounting *	<input type="checkbox"/>
Bank Accounts Prefix *	1002
Cash Accounts Prefix *	1001
# of Digits *	6
Tax calculation rounding method *	Round per Line

Enabling **Use Anglo-Saxon Accounting** will change your system's behavior into Anglo-Saxon. By default, Odoo uses continental accounting.

Bank account prefix and **Cash account prefix** are used to generate codes for bank and cash accounts. And **# of Digits** represents the number of digits in account code.

You have two options in **Tax calculation rounding method**

- Round per Line
Tax amount will be rounded in each invoice line.
- Round Globally
Rounding occurs only on total tax amount.

Overdue Payments	
Overdue Payments Message *	<div>Thank you in advance for your cooperation. Best Regards,</div>
(*) This configuration is related to the company you're logged into.	

Overdue payments Message is used on overdue report of partners. So that you can generate the report and sent it to your customer/supplier without making any modification.

Let's move to the other parts of configuration.

Configure Customer/Supplier

How to configure a customer and other related things are covered under CRM module, however Accounting related fields is just mentioning here.

The screenshot shows the 'Accounting' tab of a configuration form. It is divided into four sections: 'Sale', 'Purchase', 'Fiscal Information', and 'Accounting Entries'. Each section contains several fields with their respective values.

Sale		Purchase	
Customer Payment Terms	15 Days	Vendor Payment Terms	
Total Receivable	0.00₹	Total Payable	0.00₹
Degree of trust you have in this debtor	Normal Debtor		

Fiscal Information		Accounting Entries	
Fiscal Position	Fisc Pos Hassan	Account Receivable	100400 Debtors
		Account Payable	112110 Creditors

As we see in the picture, we can select **Customer Payment Term** and **Vendor Payment Term** for this client. **Total Receivable** and **Total Payable** are only visible in developer mode.

We can select the **Degree of trust you have** with this partner and also **Fiscal Position**.

Account Receivable and **Account Payable** will have a default value. But you can change if you want.

Configure Products

Under the **Invoicing** tab of product form, we have

- Income Account
- Expense Account
- Customer Taxes
- Vendor Taxes

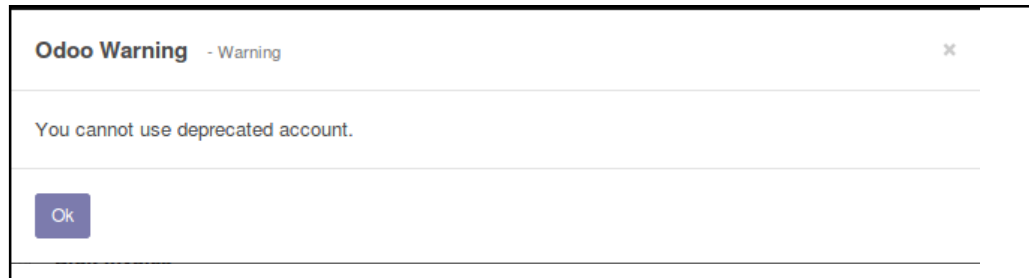
Add New Account

While we install Odoo, we had the option to choose our country. Using that data Odoo will install that country specific COA(Chart of Accounts). If you need more accounts in COA. You can create that from '**Chart of accounts**' menu.

Accounting -> Advisor -> Chart of Accounts

- We should be careful while selecting the **Type** of accounts. You can use the details provided on the right side of the window to select correct type.
- If we select any tax as **Default Tax** on an account, and we don't have any tax mentioned on product, then system will select this tax by default on invoices.

- We have to check the **Allow reconciliation** option. This account is used for Invoice and payment matching and reconciliation.
- If we mark an account as **Deprecated**, we cannot use that account anymore. We will get a warning message like this.



If you select an **Account Currency**, the system will force all moves for this account must have same currency.

Configure Taxes

In Odoo we can create different type of taxes. To create a new tax or list all the taxes in your system,

Accounting > Configuration > Accounting > Taxes

Tax Name	<input type="text"/>	Tax Scope	<input type="text" value="Sales"/>
<div> <div>Definition</div> <div>Advanced Options</div> </div>			
Tax Computation	<input type="text" value="Percentage of Price"/>	Tax Account	<input type="text"/>
Amount	<input type="text" value="0.0000"/> %	Tax Account on Refunds	<input type="text"/>

In the above picture you can see the mandatory fields for a tax.

- **Tax Name**
Name of the tax
- **Tax Scope**
Where to use this tax. If you select '**None**', you can only use this tax with other tax group.
- **Tax computation**
Odoo have four different types of tax computation
 - Group of taxes
 - Fixed
 - Percentage of price
 - Percentage of price tax included

Some other options are

- **Tax account**
The account, that will be used in the invoice tax lines. Later journal entries are created using this account. If we leave it empty, then Odoo will take the default debit/credit account of Journal.
- **Tax account on refunds.**
The account used in case of refund entry.
- **Label on Invoices**
This can be used on the invoice report to represent this tax. We can add custom tags to create custom reports.

- **Include in analytic cost**

If we set this option, then the amount computed by this tax will assign to the same analytic account mentioned the invoice line.

- **Included in price**

Set this option if this tax is included in the unit price of the product/service.

- **Affect base of subsequent taxes**

If you set this option, Base amount of subsequent taxes will be sum of current base amount and tax amount of this tax.

- **Tax adjustment**

Set this option if you want this tax to be used in tax adjustment wizard.

- **Group of taxes**

This option lets us configure the tax as collection of many child taxes. Odoo will make visible the table to select the child taxes when you select this option as tax computation method.

Tax Name	Tax Computation	Amount
Add an item		

Configure Fiscal Positions

Odoo can handle Multi Company and multi-currency concepts. Those who are dealing with us, i.e. Customers and Suppliers, may be operating from another country or states. So the laws and regulations will be different for them. Fiscal position comes in handy in this case. **We can map taxes and accounts using fiscal position.**

The screenshot shows the 'Fiscal Position' configuration form. At the top, there is a 'Fiscal Position' label, a text input field, and a 'Detect Automatically' checkbox. Below this is an 'Active' checkbox which is checked. There are two tabs: 'Tax Mapping' and 'Account Mapping'. The 'Account Mapping' tab is selected, showing a table with two columns: 'Account on Product' and 'Account to Use Instead'. Below the table is a button labeled 'Add an item'. At the bottom of the form is a 'Legal Notes...' text area.

Accounting > Configuration > Accounting > Fiscal Position

Tax mapping is another useful option to configure taxes.


For example:

The screenshot shows the 'Product' configuration form for 'iPhone 7'. The 'Product Name' is 'iPhone 7'. There are checkboxes for 'Can be Sold' and 'Can be Purchased', both of which are checked. The 'Active' status is shown as a green box with a checkmark. There are four tabs: 'General Information', 'Sales', 'Invoicing', and 'Notes'. The 'Invoicing' tab is selected. Below the tabs, there are several fields: 'Income Account' (200110 Local Sales), 'Customer Taxes' (VAT 10% x), 'Asset Type' (empty), 'Expense Account' (empty), and 'Vendor Taxes' (VAT 10% x).

Here this product's vendor tax is configured as VAT 10%. What if I cannot purchase this product from some vendors with this tax rate (assume the tax rate is more than 10%, let's take it as 12%). In this case we can use tax mapping of fiscal position

Tax Mapping		Account Mapping
Tax on Product		Tax to Apply
VAT 10%		VAT 12%
Add an item		

Let's specify this fiscal position on partner master.


Hassan Benna

Active

0.00€ Invoiced

0 Analytic Acc...

Address
Website
Tags

Job Position
Phone
Mobile
Fax
Email
Title
Language

benna@exmplae.com

English

Contacts & Addresses
Internal Notes
Sales & Purchases
Accounting

Sale
Customer Payment
Terms
Degree of trust you have in this debtor

Normal Debtor

Purchase
Vendor Payment
Terms

Fiscal Information
Fiscal Position

Fisc Pos Hassan

Accounting Entries
Account Receivable 100400 Debtors
Account Payable 112110 Creditors

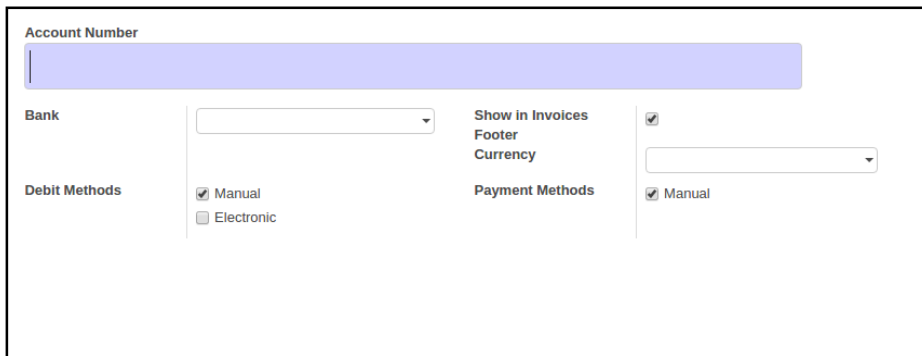
- Same we can do with accounts.

Tax Mapping		Account Mapping
Account on Product		Account to Use Instead
200110 Local Sales		200120 Retail Sales
Add an item		

Configure Bank Accounts

Accounting > Configuration > Accounting > Bank Accounts.

Here you can see the list of all the bank accounts configured in this system. To configure a new one click on the <Create> button. It will open a form to fill the details needed.



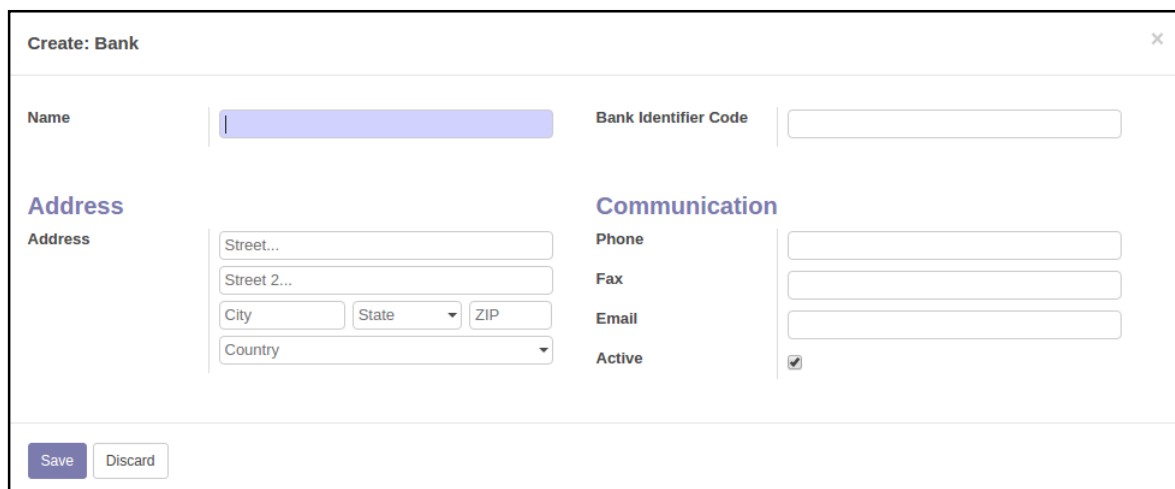
A form for configuring a bank account. It includes a text field for 'Account Number', a dropdown for 'Bank', a checkbox for 'Manual' and a radio button for 'Electronic' under 'Debit Methods', a checkbox for 'Show in Invoices Footer' and a dropdown for 'Currency' under 'Show in Invoices Footer', and a checkbox for 'Manual' under 'Payment Methods'.

Show in Invoice Footer, if we enable this feature, this account details will be displayed on Invoices and Sale orders.

Debit method is the method of collecting money and Payment method is the method for sending money

Different modules provides different methods, select according to the need.

Create/Select the bank from list of banks



A form titled 'Create: Bank' with a close button. It includes a text field for 'Name', a text field for 'Bank Identifier Code', a section for 'Address' with fields for 'Street...', 'Street 2...', 'City', 'State', 'ZIP', and 'Country', and a section for 'Communication' with fields for 'Phone', 'Fax', 'Email', and a checkbox for 'Active'. At the bottom are 'Save' and 'Discard' buttons.

Configure Journals

Accounting > Configuration > Accounting > Journals.

The screenshot shows the 'Configure Journals' form in Odoo. It has a 'Journal Name' field at the top. Below it is a 'Type' dropdown menu. There are two tabs: 'Journal Entries' and 'Advanced Settings'. The 'Journal Entries' tab is active and contains 'Short Code' and 'Entry Sequence' text fields. The 'Advanced Settings' tab contains three dropdown menus for 'Default Debit Account', 'Default Credit Account', and 'Currency'.

Mandatory fields are

- **Name**
- **Type**

There are five types of journals in Odoo.

- Sale: Using for customer invoice journal
- Purchase
- Cash
- Bank
- General

- **Short Code:**

Odoo will create a sequence number for each journal we create. Journal entries of this journal uses this short code as the prefix of generating sequence.

There are some other fields

- **Default Debit Account:**

It is the default account for debit amount.

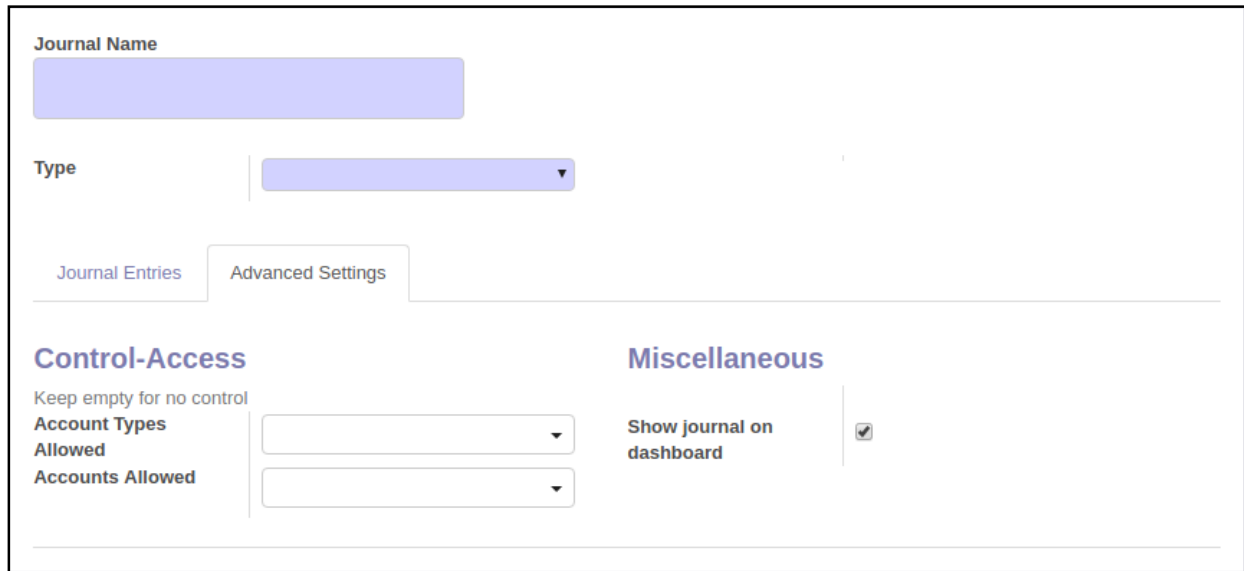
- **Default Credit Account:**

It is the default account for credit amount.

- **Currency**

We can specify the currency used to enter statements

here. Some additional options are available under '**Advanced Settings**'



The screenshot shows the 'Advanced Settings' tab for a journal configuration. At the top, there is a 'Journal Name' text field. Below it is a 'Type' dropdown menu. A tabbed interface shows 'Journal Entries' and 'Advanced Settings', with 'Advanced Settings' being the active tab. The 'Advanced Settings' section is divided into two columns: 'Control-Access' and 'Miscellaneous'. Under 'Control-Access', there is a note 'Keep empty for no control' followed by two dropdown menus: 'Account Types Allowed' and 'Accounts Allowed'. Under 'Miscellaneous', there is a checkbox labeled 'Show journal on dashboard' which is currently checked.

Under Control-Access area, we can set some control on this journal. But these are only visible in Developer Mode

- **Account Types Allowed:**
If we mention any accounts here, this journal can only create entries to that type of accounts
- **Accounts Allowed:**
Just like types, if we mention accounts here, Journal can't use accounts other than that.
- **Show Journal on dashboard:**
Checking this option will add this journal details in to dashboard as a tile

Configure Payment Terms

We may have to use different payment terms like, immediate payment, 30% advance and balance after one month, etc. in different situations. We can manage this with Odoo's payment terms

Payment Terms | 15 Days | Active | ☒

Description on the Invoice
Payment term: 15 Days

Terms
The last line's computation type should be "Balance" to ensure that the whole amount will be allocated.

Due Type	Value	Number of Days
+ Balance	0.000000	15 Day(s) after the invoice date

[Add an item](#)

Payment term have different due types.

- Balance
- Percentage
- Fixed amount

Also different due date computation parameters

- No of day(s) after the invoice date
- No of day(s) after the end of invoice month
- Last day of following month
- Last day of the current month

We can use the combination of these to create a new payment term.

For example:-

Payment term: 30% Immediate and balance at the end of the current month. In this case, we have to create a payment term with two of the above due types

Payment Terms | 30% Immediate and balance at month end | Active | ☒

Description on the Invoice
30% Immediate and balance at the end of the current month

Terms
The last line's computation type should be "Balance" to ensure that the whole amount will be allocated.

Due Type	Value	Number of Days
+ Percent	30.000000	0 Day(s) after the invoice date
+ Balance	0.000000	0 Last day of current month

[Add an item](#)

As you can see in the above picture, we have added 'Percentage' and 'Balance' lines under terms.

In percentage,

The screenshot shows a dialog box titled "Open: Terms" with a close button (X) in the top right corner. It is divided into two main sections: "Term Type" and "Due Date Computation".

Term Type

- Type**: Three radio buttons are present: "Balance" (unselected), "Percent" (selected), and "Fixed Amount" (unselected).
- Value**: A text input field contains "30.000000" followed by a "%" symbol.

Due Date Computation

- Number of Days**: A section with four radio buttons: "Day(s) after the invoice date" (selected), "Day(s) after the end of the invoice month (Net EOM)" (unselected), "Last day of following month" (unselected), and "Last day of current month" (unselected).
- Days**: A blue input field contains the number "0" followed by the text "days".

At the bottom left, there are two buttons: "Save" (highlighted in blue) and "Discard".

We have to select '0 Day(s) after the invoice date' and put the value as 30.0

In balance,

We choose the 'Last day of current month'.

The screenshot shows the same "Open: Terms" dialog box, but with different selections.

Term Type

- Type**: Three radio buttons are present: "Balance" (selected), "Percent" (unselected), and "Fixed Amount" (unselected).

Due Date Computation

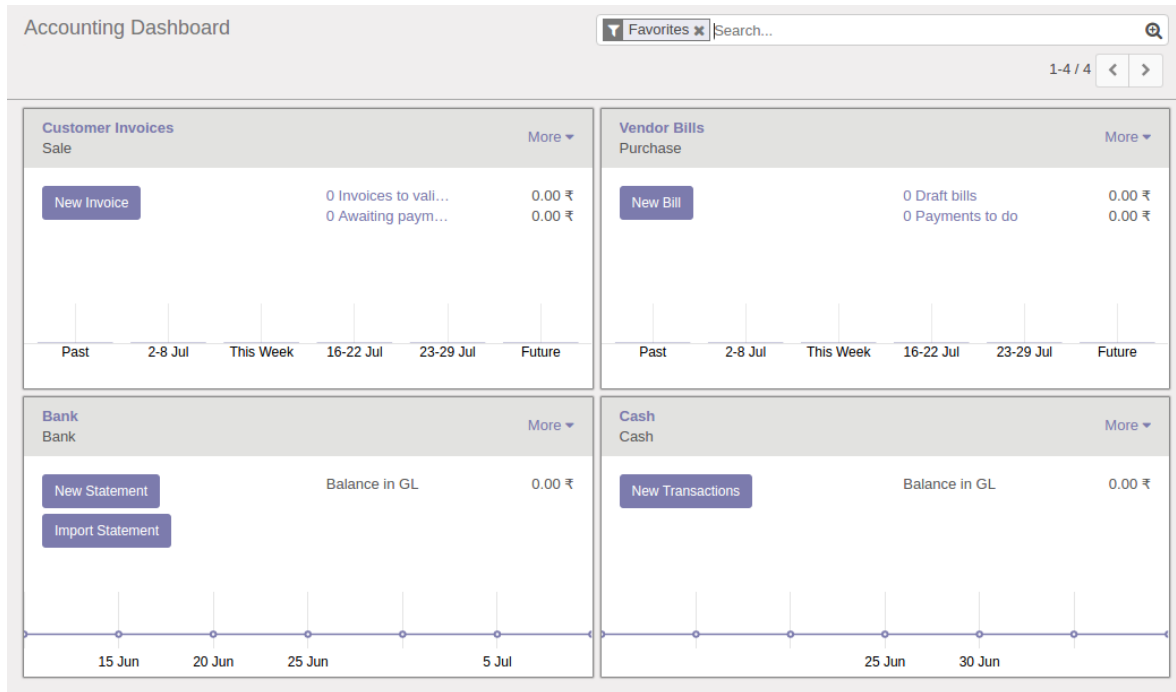
- Number of Days**: Four radio buttons are present: "Day(s) after the invoice date" (unselected), "Day(s) after the end of the invoice month (Net EOM)" (unselected), "Last day of following month" (unselected), and "Last day of current month" (selected).

At the bottom left, there are two buttons: "Save" (highlighted in blue) and "Discard".

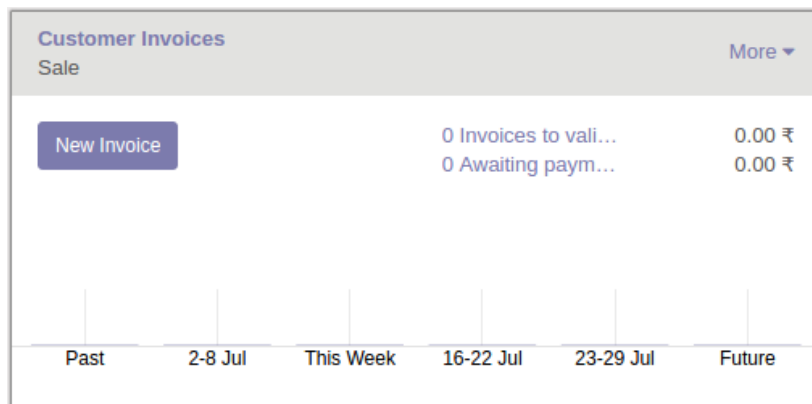
Accounting Dashboard

Odoo have a nice and simple dashboard. You will get status of your accounts from the dashboard itself.

You can also go to many other parts of your accounting app from this dashboard.



You can create new customer invoices, vendor bills, new Bank statements, and new cash transactions from this dashboard.



When you click on 'More', you'll see more related options.

Customer Invoices		More ▼
Sale		
View	New	Reports
Invoices	Invoice	Invoices Analysis
Refunds	Refund	
Payments Matching		
★ Favorite		Settings

There is a lot of features accessible from Dashboard. You can go to the list of different records, create new records, you can do payments matching from dashboard itself.

Accounting Dashboard

Favorites x Search...

1-4 / 4 < >

Customer Invoices

Sale

More ▾

View

New

Reports

Invoices

Invoice

Invoices Analysis

Refunds

Refund

Payments Matching

★ Favorite

Settings

Vendor Bills

Purchase

More ▾

View

New

Reports

Bills

Bill

Bills Analysis

Refunds

Bill Refund

Payments Matching

★ Favorite

Settings

Bank

Bank

More ▾

View

New

Reconciliation

Bank Statements

Transaction

Nothing to Reconcile

Search Operations

Import Statement

Reconciliation Models

Send Money

Receive Money

Internal Transfer

★ Favorite

Settings

Cash

Cash

More ▾

View

New

Reconciliation

Cash Statements

Transaction

Nothing to Reconcile

Search Operations

Send Money

Reconciliation Models

Receive Money

Internal Transfer

★ Favorite

Settings

Creating and Processing an Invoice

Accounting> Sales> Customer Invoice> Create

Draft Invoice

Customer: Hassan Benna | Invoice Date: | Payment Terms: 15 Days | Salesperson: Administrator | Currency: INR

Product	Description	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhone	iPhone 7	200110 Local Sale	1.000	1,000.00	0.00	VAT 12%	1,000.00₹

Untaxed Amount : 1,000.00₹
Tax : 120.00₹
Total : 1,120.00₹

Terms and conditions...

Invoice in Odoo have five states.

1. Draft:

Draft status is used when a user is creating new or unconfirmed invoice

2. Pro-forma:

Pro-forma status is used when invoice don't have a sequence number. This status is not always active. We have to enable this from account settings by checking "Allow pro-forma invoices"

3. Open:

An invoice becomes open when the user validates the invoice. From this stage onwards invoice will have a sequence number generated by Odoo itself. Invoice will remain in this state till the user registers payment for the full amount against this is voice.

4. Paid:

When the invoice is fully paid.

5. Cancel:

Cancel status is used when user cancels an invoice.

You can see the current status of the invoice in the status bar



- Click **Add an Item** to add products to your Invoice

Product	Description	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhone	iPhone 7	200110 Local Sale	1.000	1,000.00	0.00	VAT 12%	1,000.00 ₹
Add an item							

You can see other information related to this invoices under '**Other info**' tab

Invoice Lines	Other Info		
Fiscal Position	Fisc Pos Hassan	Reference/Description	
Journal	Customer Invoices (INR)		
Account	100400 Debtors		
Due Date	09/30/2017		
Tax Description	Tax Account	Amount	
VAT 12%	112320 VAT Payable	120.00 ₹	

Still our invoice is in 'Draft' state. A draft invoice won't make any difference in accounting. Accounting entries are created **only after the validation of Invoice**.

Validating an invoice will confirm the invoice. It will create a journal entry, invoice will get a sequence number, and invoice state will be in '**Open**'. Now we can make the payment against that invoice.

- You can validate an Invoice by clicking '**Validate**' button.

See the sequence code and journal entry created for this invoice in the picture below

INV/2017/0001

Customer	Hassan Benna	Invoice Date	09/15/2017
Payment Terms	15 Days	Salesperson	Administrator
		Currency	INR

Invoice Lines

Other Info

Fiscal Position	Fisc Pos Hassan	Journal Entry	INV/2017/0001
Journal	Customer Invoices (INR)	Reference/Description	
Account	100400 Debtors		
Due Date	09/30/2017		

Tax Description	Tax Account	Amount
VAT 12%	112320 VAT Payable	120.00 ₹

This is the journal entry

INV/2017/0001

Reconciled entries

Journal	Customer Invoices (INR)	Reference	
Date	09/15/2017		

Journal Items

Account	Partner	Label	Amount currency	Currency	Debit	Credit	Due date
100400 Debtors	Hassan Benna	/	0.00		1,120.00 ₹	0.00 ₹	09/30/2017
112320 VAT Payable	Hassan Benna	VAT 12%	0.00		0.00 ₹	120.00 ₹	09/15/2017
200110 Local Sales	Hassan Benna	iPhone 7	0.00		0.00 ₹	1,000.00 ₹	09/15/2017
					1,120.00	1,120.00	

See the debit and credit posting of the entry from this picture.

Send by Email

Print

Register Payment

Refund Invoice

Cancel Invoice

Draft

Open

Paid

By clicking the **'Register Payment'** you can record a payment against this invoice.

✱ Register Payment

✕

Payment Journal

Payment Date

09/15/2017

Payment Amount

1,120.00

₹

INR

Memo

INV/2017/0001

Validate

Cancel

We can choose a payment journal (cash/bank/..) here and the payment amount will be the full residual amount of that invoice. If we are recording a partial payment, then we can change the value there.

- State of the invoice will become **'Paid'** once we record the full payment against it.

If the customer made any advance payment or he has any previous balance in our system, Odoo will inform you that this way

Customer Invoices / INV/2017/0001

Edit

Create

Print

Action

1 / 1

<

>

Send by Email

Print

Register Payment

Refund Invoice

Cancel Invoice

Draft

Open

Paid

You have **outstanding payments** for this customer. You can allocate them to mark this invoice as paid.

INV/2017/0001

You can assign that outstanding balance by clicking add button on that outstanding payment

Product	Description	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhone 7	iPhone 7	200110 Local Sales	1.000	1,000.00	0.00	VAT 12%	1,000.00 ₹

Untaxed Amount :

1,000.00₹

Tax :

120.00₹

Total :

1,120.00₹

Amount Due :

1,120.00₹

Outstanding credits

Add

INV/2017/0001

1,120.00 ₹

Payments

You can **Create/List** all the list of customer payments and vendor payments from payments menu.

Payment Type	<input type="radio"/> Send Money <input checked="" type="radio"/> Receive Money <input type="radio"/> Internal Transfer	Payment Date	09/15/2017
Customer	Hassan Benna	Memo	
Payment Journal	Cash (INR)	Payment Transaction	
Payment Amount	10000.00 INR		

Payments have four states

- Draft
- Posted
- Sent
- Reconciled

A **Draft** payment becomes **Posted** when the user clicks on validate button. Becomes **Reconciled** when it is assigned against an invoice.

Manual Payment & Invoice Matching

Journal Items to Reconcile

0 / 2

Automatic reconciliation

Show

☐ Customers

☐ Vendors

☒ All

Hassan Benna		Last Reconciliation : 2017-09-15		100400	Reconcile
2017-09-15	BNK1/2017/0001: Customer Payment: INV/2017/0001			1,120.00 ₹	1,120.00 ₹ ⓘ
2017-09-30	INV/2017/0001			1,120.00 ₹	ⓘ
John Honai				112110	Skip
Filter...					
2017-09-15	CSH1/2017/0001: Vendor Payment			5,000.00 ₹	ⓘ
2017-09-16	BILL/2017/0001				8,250.00 ₹ ⓘ

Tip: Hit CTRL-Enter to reconcile all the balanced items in the sheet.

This feature allows user to match the payments and invoices and reconcile them. Odoo itself will select the most matching entry. If you want to change we can do that.

Customer Invoices

Sale

More ▾

View

New

Reports

Invoices

Refunds

Payments Matching

Invoice

Refund

Invoices Analysis

★ Favorite

Settings

You can also access this from the dashboard.

Manual Tax Adjustment

The screenshot shows the 'Make Manual Tax Adjustments' form. It includes a 'Reason...' field, an 'Amount' field set to 0.00, and an 'Adjustment Tax' dropdown. Under the 'Accounts' section, there are dropdowns for 'Debit account' (100510 VAT Receivable) and 'Credit account' (112320 VAT Payable). The 'Options' section includes a 'Journal' dropdown (Miscellaneous Operations (INR)) and a 'Date' dropdown (09/16/2017). At the bottom, there are buttons for 'Create and post move' and 'Cancel'.

This feature is used to manually correct the VAT declaration through a miscellaneous operation

Here you can only select the taxes marked as '**Tax Adjustment**'.

Submitting data will create a Journal entry with the details provided

Working with Bank Statement

You can create a new bank statement and map those transactions with the general ledger transactions in Odoo.

The screenshot shows the 'Bank' interface. It has a header with 'Bank' and a 'More' dropdown. Below the header, there are two buttons: 'New Statement' and 'Import Statement'. To the right of these buttons, there is a table showing the 'Balance in GL' as 1,120.00 ₹ and the 'Latest Statement' as 0.00 ₹. At the bottom, there is a timeline with dates: 22 Aug, 27 Aug, 1 Sep, 6 Sep, and 11 Sep.

Using the **New Statement** button we can create a new bank statement. That will open up a form like this

Reference

Journal Bank (INR) ▼ **Starting Balance** 0.00 ₹

Date 09/16/2017 ▼ **Ending Balance** 0.00 ₹

Transactions

Date	Label	Partner	Reference	Amount
09/16/2017	Customer payment	Hassan Benna		1,120.00

Add an item

Computed Balance : **1,120.00₹**

Here you can put all the details of transactions. A bank statement have two states

- New
- Validated

Reconcile New Validated

We have to reconcile the statement to make it **Validated**.

Bank Reconciliation 0 / 1 Automatic reconciliation

Hassan Benna Reconcile

100201	2017-09-16	Customer payment	1,120.00 ₹	
100201	2017-09-15	BNK1/2017/0001: CUST.IN/2017/0001 : INV/2017/0001		1,120.00 ₹

Tip: Hit CTRL-Enter to reconcile all the balanced items in the sheet.

Odoo will select the most matching bank transaction record from general ledger same as payment matching.

Clicking the **Reconcile** button will complete the process.

Asset Management

Odoo's asset management allows you to track your fixed assets like, equipment, furniture, vehicles, land, etc. You can purchase, sell and manage depreciation using Odoo

We can configure asset categories in Odoo. This will make things easier for normal users by providing complex details in category and use it in assets.

Create Asset Type

Accounting > Configuration > Management > Asset Type

The screenshot shows the 'Create: Category' form in Odoo. The form is titled 'Create: Category' and has a close button (X) in the top right corner. The main section is 'Asset Type', where 'Computers' is entered in the text field. Below this, there are three main sections: 'Journal Entries', 'Periodicity', and 'Additional Options'. The 'Journal Entries' section has four fields: 'Journal' (Miscellaneous Operations (IN)), 'Asset Account' (101800 Misc Assets), 'Depreciation Entries: Asset Account' (101800 Misc Assets), and 'Depreciation Entries: Expense Account' (empty). The 'Periodicity' section has two radio buttons: 'Time Method Based On' (selected) and 'Ending Date'. Under 'Time Method Based On', there are two sub-sections: 'Number of Entries' (5) and 'One Entry Every' (12 months). The 'Additional Options' section has two checkboxes: 'Auto-confirm Assets' and 'Group Journal Entries', both of which are unchecked. The 'Depreciation Method' section has two radio buttons: 'Linear' (selected) and 'Degressive'. Below these, there is a checkbox for 'Prorata Temporis', which is also unchecked. At the bottom of the form, there are two buttons: 'Save' and 'Discard'.

Advisor can give the appropriate accounts for generating journal entries here. He can also provide details to compute the depreciation. There are many things to provide

- **Time method based on:** Method to compute the depreciation date and number of depreciation lines. We have two options here.
 - **Number of depreciation:** by choosing this option we are fixing the number of depreciation and the time between two depreciations.
 - **Ending date:** This way, instead of giving the number of depreciation. We give the date that depreciation will not go beyond

Periodicity

Time Method Based On

☐ Number of Depreciations
☒ Ending Date

One Entry Every months

Ending date

- **Computation Methods:** Here we can choose the method to use for computing the depreciation amount. Here also we have two options
- **Auto-confirm Assets:** Ticking this option will auto confirm all the assets comes under this category when they created from the invoices.
- **Group Journal Entries:** if you want to group the journal entries generated using the category, tick this option.

Create Asset

We can create an asset in two ways:

- Manually
- From Supplier Invoice To create an asset manually,

Accounting> Advisor > Assets

Asset Name

Laptop Acer

Category: Computers

Reference:

Date: 09/16/2017

Currency: INR

Gross Value: 40000.00 ₹

Salvage Value: 10000.00 ₹

Residual Value: 30,000.00 ₹

Vendor:

Invoice:

Depreciation Board

Depreciation Information

Computation Method

☒ Linear
☐ Degressive

Time Method Based On

☒ Number of Depreciations
☐ Ending Date

Prorata Temporis

☐

Number of Depreciations: 5

Number of Months in a Period: 12

Here we can fill the details of your asset

- **Salvage value:** this is the amount you plan to have that cannot depreciate
- **Vendor:** The vendor from we purchased this asset
- **Invoice:** The invoice related to the purchase of this asset

An asset have three states

- Draft
- Running
- Close

Once we created an asset, we should **confirm** it. We can also click on the Compute Depreciation button to check the depreciation board before confirming the asset.



Then the asset will change to **Running** state you can see the depreciation board

Asset Name		0 Items	
Laptop Acer			
Category	Computers	Currency	INR
Reference		Gross Value	40,000.00₹
Date	09/16/2017	Salvage Value	10,000.00₹
		Residual Value	30,000.00₹
		Vendor	
		Invoice	
Depreciation Board		Depreciation Information	
Depreciation Date	Cumulative Depreciation	Depreciation	Residual
01/01/2017	6,000.00	6,000.00	24,000.00
01/01/2018	12,000.00	6,000.00	18,000.00
01/01/2019	18,000.00	6,000.00	12,000.00
01/01/2020	24,000.00	6,000.00	6,000.00
01/01/2021	30,000.00	6,000.00	0.00

Draft Bill

Vendor: John Honai

Vendor Reference:

Bill Date:

Due Date:

Currency: INR

Bill Other Info

Product	Description	Asset Category	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
<input type="text"/>								

The red button indicates that related journal entry is not created and green bullet means that the journal entry has created for this line

You can sell or dispose the asset using the **Sell or Dispose** button on status bar. It will create a journal entry to post the full expense of the asset. But it won't create a sale entry or an invoice.

To modify the depreciation of an asset, Click on the **<Modify Depreciation>** button and provide the values accordingly.

Modify Asset

Asset Durations to Modify

Reason: Laptop Acer

Period Length: 12 months

Number of Depreciations: 5

Creating an asset from supplier invoice is easier.

We just have to give the asset category. Odoo will create asset based on the data in category and invoice. If we set asset category in product itself, then asset category in invoice line will be automatically selected.

Asset will be automatically confirmed if we tick the asset category option **Auto-confirm Assets**.

- **Accounting> Advisor> Generate Asset Entries**, is an option to trigger the generation of asset depreciation entries

Analytic Accounting

Odoo have a feature called analytic accounting. This is an advanced feature that we can use for different purposes. Like,

- Cost center concept
- Timesheet invoicing
- Project management
- Budget management

We have to enable analytic accounting first from settings to use this feature.

We have to create analytic accounts here,

Accounting> Configuration> Analytic Accounting>Analytic Account.

You can select a customer for an analytic account. Then, this will be added to the name of analytic account. It will make the selection of analytic account easy.

Now you can select this analytic account in Invoices.

Bill
BILL/2017/0002

Vendor John Honai **Bill Date** 09/20/2017
Vendor Reference **Due Date**
Currency INR

Bill Other Info

Product	Description	Asset Category	Account	Analytic Account	Analytic Tags	Quantity	Unit Price	Taxes	Amount
iPhone 7	iPhone 7		210700 Purchase Expense	Administration		1.000	750.00	VAT 10%	750.00 ₹

Let's check the changes this makes.

BILL/2017/0002 Reconciled entries

Journal Vendor Bills (INR) **Reference**
Date 09/20/2017

Journal Items



Account	Partner	Label	Analytic Account	Amount currency	Currency	Debit	Credit	Due date
112110 Creditors	John Honai	/		0.00		0.00 ₹	825.00 ₹	09/20/2017
210700 Purchase Expense	John Honai	VAT 10%	Administration	0.00		75.00 ₹	0.00 ₹	09/20/2017
210700 Purchase Expense	John Honai	iPhone 7	Administration	0.00		750.00 ₹	0.00 ₹	09/20/2017
						825.00	825.00	

Here we can see that each debit entry have analytic entries selected. This will create an analytic entries in Odoo. You can see the analytic entries under **Accounting> Advisor> Analytic Entries**.

Description	VAT 10%	Amount	
Analytic Account	Administration	Amount	-75.00₹
Financial Account	210700 Purchase Expense	Amount Currency	0.00
Ref.		Product	
Partner		Unit of Measure	
Move Line	BILL/2017/0002	Quantity	1.00
Date	09/20/2017		

Description	iPhone 7	Amount	
Analytic Account	Administration	Amount	-750.00₹
Financial Account	210700 Purchase Expense	Amount Currency	0.00
Ref.		Product	iPhone 7
Partner		Unit of Measure	Unit(s)
Move Line	BILL/2017/0002	Quantity	1.00
Date	09/20/2017		

These are the analytic entries created. Unlike general accounting journal entry, analytic entry don't have debit/credit. It is handled with negative and positive value for 'amount'.

Administration		 Active	 Cost/Revenue
Reference		Tags	
Customer		Currency	INR

By clicking this Cost/Revenue smart button we can see the analytic entries of that account.

Budget Management

Budget management plays an important role in the success of any business. We can check our financial status with the planned details using Odoo's budget management section. Odoo uses its general and analytic accounting in budget management.

We need to configure three things to work with Odoo budget management

- Budgetary Positions
- Analytic Accounts
- Budget

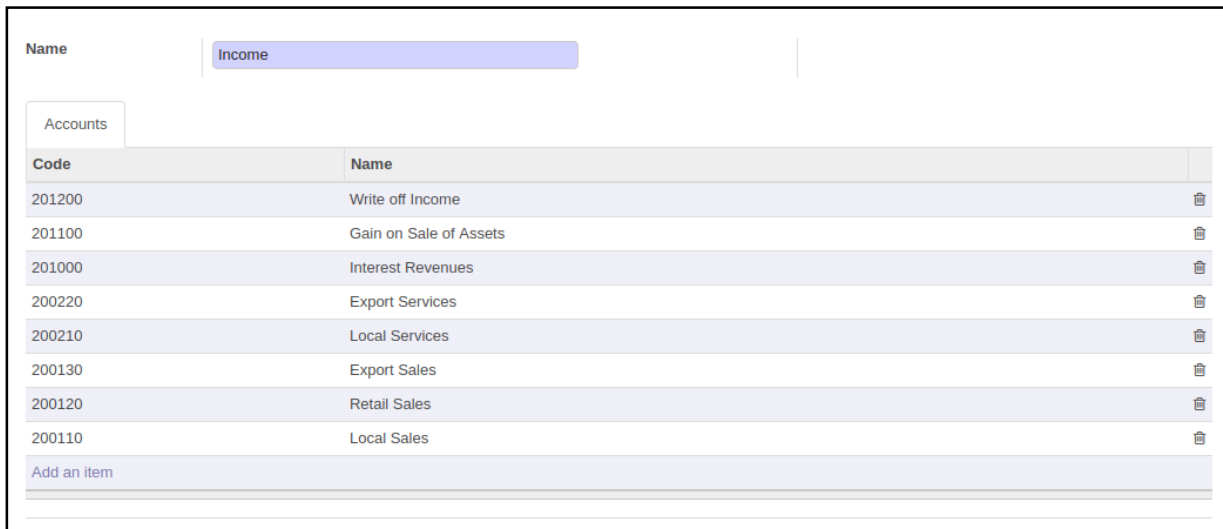
Budgetary positions are a kind of mapping the general accounts with budgets Let's create a budgetary position.

We can create budgetary position from Budget form itself,

Or we can create from

- **Accounting>Configuration>management>Budgetary Position**

We are now creating a budgetary position Income.



The screenshot shows the 'Budgetary Position' configuration form in Odoo. The 'Name' field is filled with 'Income'. Below this, there is a tab labeled 'Accounts'. Under the 'Accounts' tab, a table lists several general accounts that have been selected for this budgetary position. Each row includes a 'Code', a 'Name', and a delete icon.

Code	Name
201200	Write off Income
201100	Gain on Sale of Assets
201000	Interest Revenues
200220	Export Services
200210	Local Services
200130	Export Sales
200120	Retail Sales
200110	Local Sales

At the bottom of the table, there is a link that says 'Add an item'.

We have selected some General accounts under this budgetary position. Same way we are creating another one, Expense.

Name

Accounts

Code	Name	
210700	Purchase Expense	
210600	Telephone Expense	
210500	Internet Expense	
210300	House Keeping Expense	
210200	Office Rent	
210100	Salary Expense	
210000	Electricity Expense	

[Add an item](#)

Now we have two budgetary position in our system.

The role of analytic accounting comes when we have to get the details based on a specific Customer/Supplier or a project. We already discussed how we can create an analytic account.

So we are moving to the configuration of budget.

Budget Name

Budget-2017

Responsible Period -

Budget Lines

Budgetary Position	Analytic Account	Start Date	End Date	Planned Amount	Practical Amount	Theoretical Amount	Achievement
Add an item							
				0.00	0.00	0.00	

As we can see on the picture, we have to give a **Name** for budget and also a **Period**. Then we must add our budgetary positions we already created to this budget.

At that time we have to provide our planned amount to that position.

Open: Budget Lines

Budgetary Position
Income

Period
01/01/2017 - 12/31/2017

Planned Amount
100,000.00

Analytic Account
Project 1 - Hassan Benna

Save & Close Save & New Discard

- Add other necessary fields you need.

Budget-2017

Responsible

Administrator

Period

01/01/2017 - 12/31/2017

Budget Lines

Budgetary Position	Analytic Account	Start Date	End Date	Planned Amount	Practical Amount	Theoretical Amount	Achievement
Income	Project 1 - Hassan Benna	01/01/2017	12/31/2017	100,000.00	0.00	72,377.66	0.00
Expense	Project 1 - Hassan Benna	01/01/2017	12/31/2017	750,000.00	0.00	542,832.44	0.00
				850,000.00	0.00	615,210.09	

Now you can see there is four columns in the table

- **Planned amount:** The amount we gave
 - **Practical Amount:** It is the actual amount
 - **Theoretical amount:** It is the amount we could have spent/ received till today
 “If the planned amount is 12000 then for one year, then on January 31st the theoretical amount will be 1000. On May 31st it will be 5000, On December 31st it will be 12000.”
 - **Achievement:** percentage of practical amount with respect to theoretical amount.
- We have to Confirm and approve the budget
 You can check the budget any time.

Customer Relationship Management

Customer Relationship Management, which is the most important part of a business, is simplified with Odoo CRM system. Odoo CRM is a combination of 8 Apps and Plugins. For efficient management of customer relation, you must install all the following Apps/Plugins.

- CRM

And following optional apps can further enhance CRM capabilities

- CRM Gamification
- Marketing campaign
- Survey CRM
- Contact Form
- Resellers
- Lead to Issue
- Opportunity to quotation

Since any discussion on CRM can't be completed without sales procedure, in this section we will explain CRM combined with sales module. To get sale features in your ERP you have to install following apps from Odoo.

- Sales
- Sales Teams
- Sales and MRP management
- Margins in sales orders etc.

The first application 'sales' alone can facilitate all sales related procedures rest is options. However, for a better sales management, you may install rest of the apps also. You can find more related applications from Apps tab in your ERP.

Comparing to other CRM applications like Salesforce, Zoho, and Sugar CRM Odoo has a lot of unique features. If we consider the case of 'Salesforce' Odoo has an advantage of features like Price list, Quotation Templates, eSignature, Online Payment, Invoicing, Customer Portal, Shipper Integration, Leads Tracking, Social Network Integration etc. If it is in the case of Zoho the list changes to Pipeline management, Next Action, Multiple companies per contract, Pricelist, Quotation Templates, eSignature, Drag and Drop management etc. Undoubtedly Odoo user interface is the easiest and user-friendly among all these CRM's.

Some of the useful features of Odoo CRM includes

- **Priorities activities**

Priorities the follow-up activities in pipeline and meet your targets efficiently

- **Track your sales activities.**

Track the sales stages more easily via sales pipeline Kanban view.

- **Schedule Meetings**

Schedule meetings directly from the opportunity of customer

- **Dashboards**

Get all the necessary details of ongoing and done business activities in your Dashboard

- **Get in touch with customers**

Maintain Communication with customers via email, phone, chat, and social media from within your Odoo CRM.

- **Leads Promotion**

Start campaign by sending auto generated emails to customers in Leads. Assign a salesperson to follow the lead and promote it.

- **Opportunities Analysis**

Analyze your opportunities pipeline with advanced filters, grouping, drill down, etc.

- **Lead Scoring**

Score your leads based on explicit and implicit criteria and decide which lead satisfies the benchmark to become opportunity.

- **Customized Alerts**

Set custom alerts for opportunities based on some activities

- **Analyze Opportunity lost**

Analyze the reasons behind the loss of opportunities and improve your sales efficiency.

- **GeoIP**

Detect countries, states and cities of leads automatically from your visitor IP address.

- **Automate routines and Focus on sales**

Automate routine business activities, don't waste time on maintain data.

Odoo CRM general workflow

CRM in Odoo can be explained as a series of events that start with identifying a **Lead** (a future sale possibility) and passes through different stages like **Opportunity, Quotation, Sale Order** and actual sale (invoice generation and payment). Odoo integrates Customer Management module along with these processes to accomplish effective Customer Relationship Management. The basic steps involved in tracking a sale can be listed as below

Lead: - A possible future sale, it may be created just because a user enquired a product

Opportunity: - More possibility of sale. Here onwards the organization may appoint a person to follow-up the customer.

Pipeline: - it is a convenient mechanism provided by Odoo to track Opportunity. You can create many stages based on the possibility of the Sale and track more effectively.

Quotation: - once the opportunity is Won, then next level is to make a quotation and send to the customer.

Next, **Quotation** changes to **Sale Order** and then to **Invoice Generation** and **Payment**.

System Users

There are three types of default user as far as CRM (Including Sales + Purchase + Customer Management) module is concerned.

Manager: - who will have complete access over all these Sales, Purchase modules

User - Own documents only: - This user will have the permission to control the documents and entries created by him. For example, you can restrict a sales executive from accessing another sales executives documents.

User - All documents: - may be a sales head, he has to view all the documents by all sales representative.

Customer Management

Create customer

Basically, in Odoo CRM a person you add is called **Partner** rather than **Customer** i.e. you can keep the entity both as a **Customer and Vendor**

- Sales -> Customers -> Create

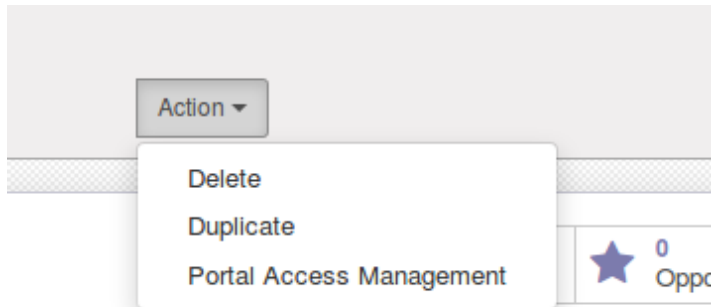
Tick **Is a Customer**, **Is a Vendor** check boxes in Sales & Purchases according to the nature of entity.

- Use **Partner Assignment** tab to track Geo-location of customer
- **Accounting** tab can be used to add accounting info of the entity.
- Choose between **Individual** , **Company** radio button accordingly
- Click on **Active** button to activate the profile for use (otherwise it will not be listed elsewhere).

If we go to the **Sales & Purchases** tab, we can specify a salesperson who is in charge of communicating with this customer. We can also choose that this customer should be able to receive email notifications or not. If this option is enabled, then this **customer will receive emails for each notification in his inbox**.

The field, '**Mailing Opt-Out**' is really useful in cases where we don't need to receive any emails from mass mailing or marketing campaigns. If this option is enabled, this customer won't receive any emails from mass mailing and marketing campaigns. The Number of bounced emails will be displayed in the 'Bounce' field.

For providing portal access, we need to configure the email and enable the '**In Portal**' option for those customers.

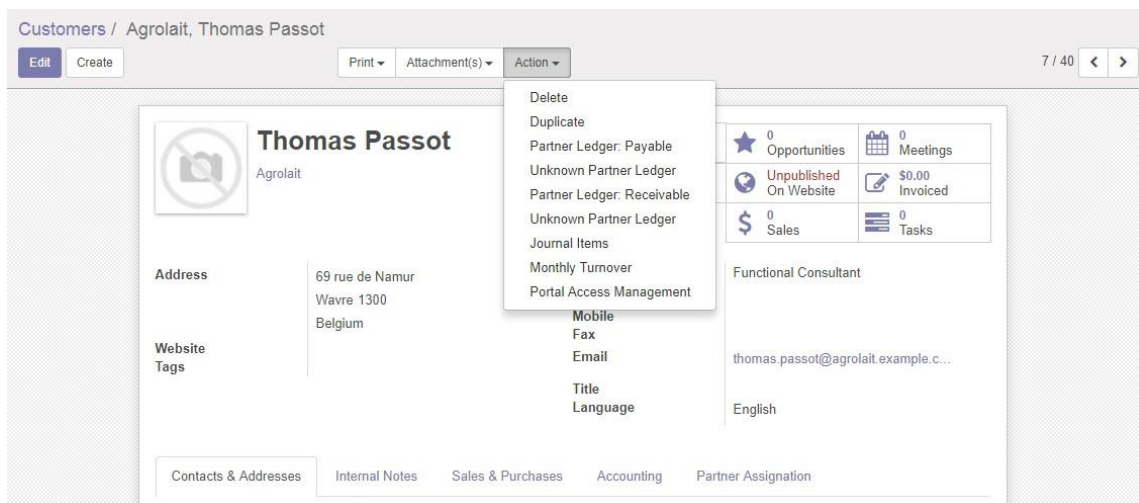


Upon clicking on the 'Portal Access Management' option, a new wizard will appear. Here we can enter the email address. The option 'In Portal' should be selected for those contacts to whom we wish to enable the portal access. Once we have filled the details and applied, an email will be sent to the specified email address. With the portal access enabled, the user can sign in to Odoo from the link provided in the E-mail

Update/Delete a Customer Details

- Sales -> Customers

Click on any of the Customer from Kanban view



- Click **<Edit>** to make modifications
- Or find more Details related with the customer from **Action** tab

Note: - "You can directly jump to the opportunities, meetings, invoice, Tasks, Ledger and any details linked with your customer from this window."

Product Management

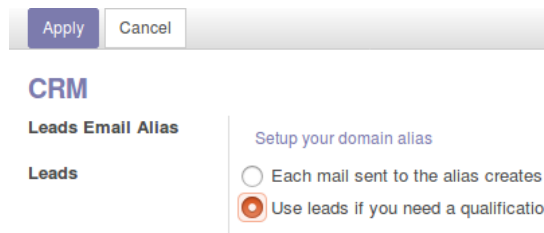
To sell any product, we must create a product or add a product to our inventory. Though it is an activity done under inventory management, Odoo Sales module provides a quick link under **Sales > Products** tab to perform product management functions like Add Product Update Stock etc. To see the full functionality and processes in Product Management refer Inventory management module

Pre-Sale Tracking

Lead Generation

For handling our leads with Odoo, first we have to **enable the leads option from the settings**.

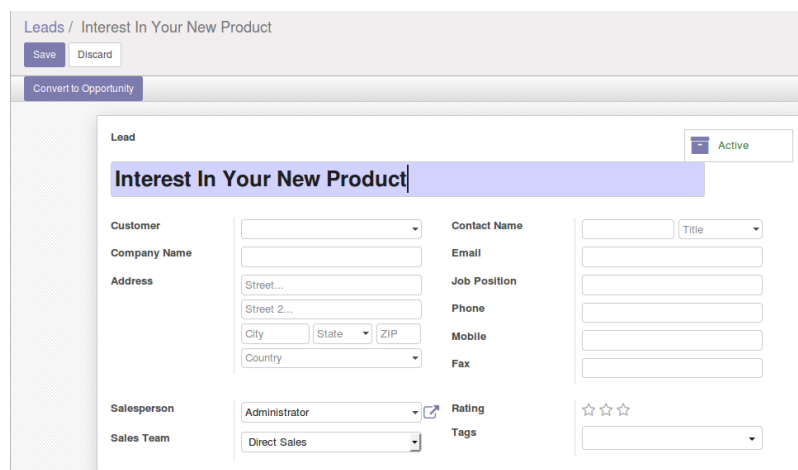
- Sales -> Configuration -> Settings



The screenshot shows the 'CRM' settings page in Odoo. Under the 'Leads' tab, there is a section titled 'Leads Email Alias'. It includes a link 'Setup your domain alias' and two radio button options: 'Each mail sent to the alias creates' (unselected) and 'Use leads if you need a qualification' (selected).

After this option is enabled, a new menu for creating the leads will appear.

- Sales -> Leads -> Create



The screenshot shows the 'Lead' creation form in Odoo. The title is 'Interest In Your New Product'. The form includes fields for Customer (dropdown), Company Name, Address (Street, Street 2, City, State, ZIP, Country), Contact Name, Email, Job Position, Phone, Mobile, Fax, Salesperson (dropdown), Sales Team (dropdown), Rating (stars), and Tags (dropdown). There are 'Save', 'Discard', and 'Convert to Opportunity' buttons at the top.

In the lead creation form, we can select a customer or we can create a new customer and link to this lead. Complete address of this customer can be specified here. There are some optional fields such as email, contact name, job position, mobile, phone, fax, etc. are available. **The corresponding salespersons details who creates this lead will be automatically filled and his sales team will also be selected automatically.**

Or you can generate Leads from Incoming Mails

There are several ways for your company to generate leads with Odoo CRM. One of them is using your company's generic email address as a trigger to create a new lead in the system. In Odoo, each one of your sales teams is linked to its own email address. You can configure this E-mail to generate Leads automatically. For this, first we need to configure the Incoming & Outgoing mail servers from settings.

Apply

Cancel

CRM

Leads Email Alias

Each sales team has an email alias that could be setup on the sales team form. You can setup a generic email alias to create incoming leads.

@45.33.78.184

Leads

☒ Each mail sent to the alias creates a new opportunity

☐ Use leads if you need a qualification step before creating an opportunity or a customer

Opportunities

- **Sales -> Leads**

Leads / Information about laptop

Edit

Create

Attachment(s) ▾

Action ▾

1 / 8 < >

Convert to Opportunity

Information about laptop

Active

Company Name	Solar IT	Contact Name	Jose Garcia
Address	Madrid 28001 Spain	Email	jga@solar.example.com
		Job Position	Medical illustrator
		Phone	
		Mobile	
		Fax	
Salesperson	Demo User	Rating	★ ★ ☆
Sales Team	Unknown	Tags	Product

Internal Notes

Extra Info

- Click **Convert To Opportunity**

72

Convert to opportunity

Conversion Action

- ☒ Convert to opportunity
☐ Merge with existing opportunities

Assign this opportunity to

Salesperson

Administrator

Sales Team

Direct Sales

Customers

- ☐ Link to an existing customer
☐ Create a new customer
☒ Do not link to a customer

Create Opportunity

Cancel

If we select the conversion action '**Convert to opportunity**', then a new opportunity will be created. If '**Merge with existing opportunities**' is selected, then a new option will appear which will allow us to select the opportunities.

Conversion Action

- ☐ Convert to opportunity
☒ Merge with existing opportunities

Assign this opportunity to

Salesperson

Administrator

Sales Team

Direct Sales

- Field: opportunity_ids
- Object: crm.lead2opportunity.partner
- Type: many2many
- Relation: crm.lead


Opportunities




Create Date	Opportunity	Type	Contact Name	Email	Phone	Stage	Salesperson	Sales Team
Add an item								

We can assign this opportunity to a salesperson and his team. While creating the opportunities, it is optional for us to link it with a customer. If we select the option '**Do not link with a customer**', then no customer will be linked with. There are other options available to link with existing customer or to create a new customer and link with him.

Or you can create opportunity directly

- Sales -> My Pipeline -> Create

 **Create an Opportunity**

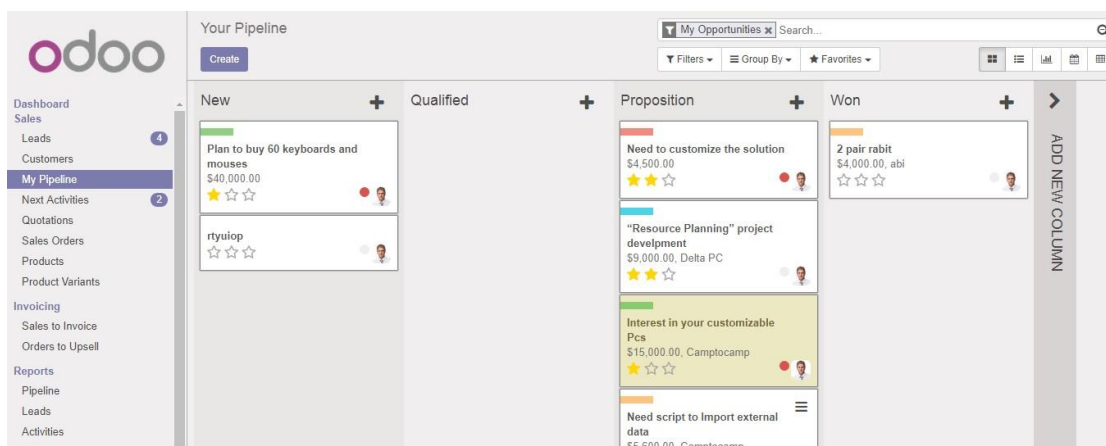
Opportunity Title	<input type="text" value="Interest In Your New Product"/>
Customer	<input type="text"/>
Expected Revenue	<input type="text" value="500"/>
Rating	<div></div>

Note: - “Once a lead is converted to Opportunity it is pipelined”

Sales Pipeline

After creating the opportunities, it will be displayed in the Sales Pipeline section. From ‘**My Pipeline**’ menu, we can see that all the opportunities are grouped by their corresponding stages.

- Sales -> My Pipeline



The screenshot shows the Odoo Sales Pipeline interface. The left sidebar contains the following menu items: Dashboard, Sales, Leads, Customers, **My Pipeline** (selected), Next Activities, Quotations, Sales Orders, Products, Product Variants, Invoicing, Sales to Invoice, Orders to Upsell, Reports, Pipeline, Leads, and Activities. The main area is titled 'Your Pipeline' and features a 'Create' button. Below the title, there are tabs for 'My Opportunities' and a search bar. The pipeline is divided into four stages: New, Qualified, Proposition, and Won. Each stage contains a list of opportunities. The 'New' stage has two opportunities: 'Plan to buy 60 keyboards and mouses' (\$40,000.00, 3 stars) and 'rtyuiop' (3 stars). The 'Qualified' stage is empty. The 'Proposition' stage has three opportunities: 'Need to customize the solution' (\$4,500.00, 3 stars), '"Resource Planning" project development' (\$9,000.00, Delta PC, 3 stars), and 'Interest in your customizable Pcs' (\$15,000.00, Camplocamp, 3 stars). The 'Won' stage has one opportunity: '2 pair rabbit' (\$4,000.00, abi, 3 stars). A vertical button on the right side of the pipeline is labeled 'ADD NEW COLUMN'.

One of the main features of Odoo is the 'Drag and drop' facility in this view. **We can change the status or stage of an opportunity by simply dragging from one stage to another.**

Pipeline Configurations

We can configure the stages we want to use in our pipeline. Under the CRM module

- **Configuration -> Leads and Opportunities -> Stages**

Here we need to provide a **Stage Name**, and **Stage Probability** to specify the probability of the lead when that lead is in this stage.

- We can relate this stage to a sales team if we need. **If we select a team, then this stage will be accessible to those team members only.**

Edit/Update Pipeline Content

- **Sales -> My Pipeline**

- To create new opportunities, click '**Create**' button. Edit an Existing opportunity select any of the opportunity from list.

Your Pipeline / Interest In Your New Product

Save Discard 1 / 1 < >

Mark Won Mark Lost Log Activity New Qualified Proposition Won

Opportunity

Interest In Your New Product

Expected Revenue: 500.00 € at Probability: 10 %

Customer: Hassan Benna Next Activity: []

Email: benna@exmplae.com Expected Closing: []

Phone: []

Salesperson: Administrator Rating: ★★☆☆

Sales Team: Direct Sales Tags: []

0 Meeting

- We can use the field '**customer**' to select the customer related with this opportunity

Expected revenue from this Opportunity and probability of winning this Lead and converting it to our sales will also be shown here. Once we have set any Meetings related to this Opportunity, it can be seen by clicking on the button at the right top corner of this form. The number of meetings will be shown. In the **Contact Information** tab, the details of the contact related to this opportunity can be specified. The buttons, '**Mark Won**' and '**Mark Lost**' are used to mark the opportunity as won or lost.

Next Activity field in Pipeline

This another important settings available in Pipeline. At each stage of Pipeline we can assign next activity to be done for the follow up of that opportunity. To set next activity

- **Sales -> My Pipeline**

New + Qualified + Proposition +

Plan to buy 60 keyboards and mouses
\$40,000.00
★☆☆

rtyuiop
☆☆☆

Need to customize the solution
\$4,500.00
★★★☆☆

"Resource Planning" project development
\$9,000.00, Delta PC
★★★☆☆

Interest in your customizable Pcs
\$15,000.00, Campocamp
★★★☆☆

At the right bottom of every Lead, we can see a white dot symbol, which can be used to assign **Next Activities** to this opportunity. Upon clicking it, a new wizard will appear, which will allow us to create the next activity.

Schedule an Activity

Activity
Next Activity Date
Summary

Recommended activities:
☐ Email
☐ Call
☐ Task

Schedule Activity
No activity

The **Next Activity** can be Email, Call or Task. We should set a date and summary to specify the purpose of this activity.

Note: - “you can track all the recorded ‘Next Activity’ from **Sales -> Next Activities**”

Next Activities								
<div> <div>Create</div> <div>Import</div> </div>		<div> <div>My Opportunities</div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> <div>1-4 / 4</div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div> </div>						
<input type="checkbox"/> Opportunity	Customer	Next Activity Date	Next Activity	Next Activity Summary	Stage	Expected Revenue	Expected Closing	
<input type="checkbox"/> Interest in your customizable PCs	Camptocamp	07/30/2017	Call	Followup on the proposal	Proposition	15,000.00	08/08/2017	
<input type="checkbox"/> Need to customize the solution		08/01/2017	Call	Conf call with technical service	Proposition	4,500.00		
<input type="checkbox"/> Need 20 Days of Consultancy		08/03/2017	Email		Proposition	60,000.00		
<input type="checkbox"/> Plan to buy 60 keyboards and mouses		08/04/2017	Task	Meeting to go over pricing information.	New	40,000.00	08/15/2017	

Quotation

Create Quotation

Once the opportunity has been ‘Won’, next level is initiating actual sales procedure. So first step is preparing a quotation and send it to the customer. You can create a quotation by two methods.

- Sales -> Quotation -> Create

Quotations / New

Save Discard

Send by Email Print Confirm Sale Cancel Quotation Quotation Sent Sales Ord

New

Customer: Hassan Benna

Order Date: 06/30/2017 10:13:00

Expiration Date:

Payment Terms:

Order Lines Other Information

Product	Description	Ordered Qty	Unit Price	Taxes	Discount (%)	Subtotal
+	iPhone 7	1.000	150.00	(standard)Input Excise Duty @ 12.36%	0.00	150.00

Add an item

- The expiration date field is used to set the validity or expiration date of this quote. *(If this field is not set, it will be automatically calculated based on the template associated with it if online quotation is installed.)*
- The **Payment Terms** specify the conditions for paying an invoice.
(We can set it like, if the customers pays within 10 days, he will get 20% discount, etc.)
- We can provide discounts to the order lines by enabling the option from the **Settings**.

Discount

- ☐ No discount on sales order lines, globally
- ☒ Allow discounts on sales order lines

- The '**Send By Email**' button can be used to send this quotation to the customer by email.
- Under the '**Other Information**' tab, we can provide the related salesperson and his team.

Order Lines Other Information

Sales Information

Salesperson: Administrator

Sales Team: Direct Sales

Customer Reference:

Invoicing

Fiscal Position:

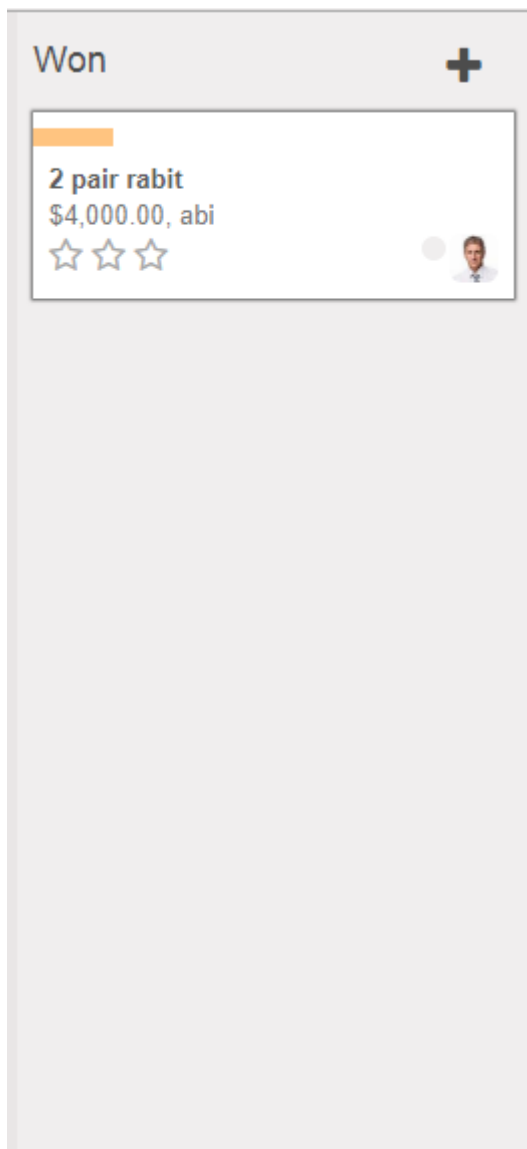
Reporting

Source Document:

Or you can create a Quotation from your Pipeline.

Once the opportunity is won (it reached its final confirmation stage), there is direct button to create Quotation for that opportunity.

- **Sales -> My Pipeline -> Won** (or Whatever be the final Stage) Select any of the '**Won**' opportunity



Your Pipeline / 2 pair rabbit

Edit Create Attachment(s) Action 8 / 8

New Quotation Mark Lost Log Activity New Qualified Proposition Won

2 pair rabbit

\$4,000.00 at 100 %

Won

Active

0 Meeting

0 Quote(s)

\$100.00 Orders

Customer	abi	Next Activity	
Email		Expected Closing	09/26/2017
Phone			
Salesperson	Administrator	Rating	☆☆☆
Sales Team	Direct Sales	Tags	Services

Internal Notes Contact Information

- <New Quotation>

Sale Order & Invoicing

Create Sale order

As in the case of quotation we can create a sale order in two ways.

- Sales -> Sales Orders -> Create

Sales Orders / New

Save Discard

Send by Email Print Confirm Sale Cancel Quotation Quotation Sent Sales Order

New

Customer		Order Date	09/15/2017 09:08:42
		Expiration Date	
		Payment Terms	
		Delivery Method	

Order Lines Other Information

Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
Add an item							

Setup default terms and conditions in your company settings.

Untaxed Amount : 0.00

Taxes : 0.00

Here we get a window to create a Quotation create Quotation and click **Confirm Sale** to create sale order.

- Once the sale order is created you can access the same from inventory Module too.

Create Invoice


Sales -> Invoicing -> Sales To Invoice

Select the sale order to invoice.

Sales Orders / SO010

Edit Create Print Attachment(s) Action 1 / 6 < >

Create Invoice Print Send by Email Cancel Lock Quotation Quotation Sent Sales Order

SO010  1 Delivery

Customer: abi Confirmation Date: 09/14/2017 14:12:30

Payment Terms: Delivery Method: Normal Delivery Charges \$10.00

Order Lines		Other Information					
Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
[1] Ice Cream	[1] Ice Cream	1.000	0.000	0.000	100.00	Tax 15.00%	\$ 100.00

Untaxed Amount : \$100.00
Taxes : \$15.00
Total : **\$115.00**

Just like the quotation, it is possible for us to specify the salesperson and the sales team related under the '**Other Information**' tab.

- The '**Lock**' button is used to lock this sale order. Once it is locked, it cannot be edited. But we can deliver or create invoices for this order.
- The invoice status of this order will be shown under the Other Information tab.
- Click **Create Invoice** to generate invoice

Invoice Order

Invoices will be created in draft so that you can review them before validation.

What do you want to invoice?

- ☐ Invoiceable lines
- ☒ Invoiceable lines (deduct down payments)
- ☐ Down payment (percentage)
- ☐ Down payment (fixed amount)

Create and View Invoices

Create Invoices

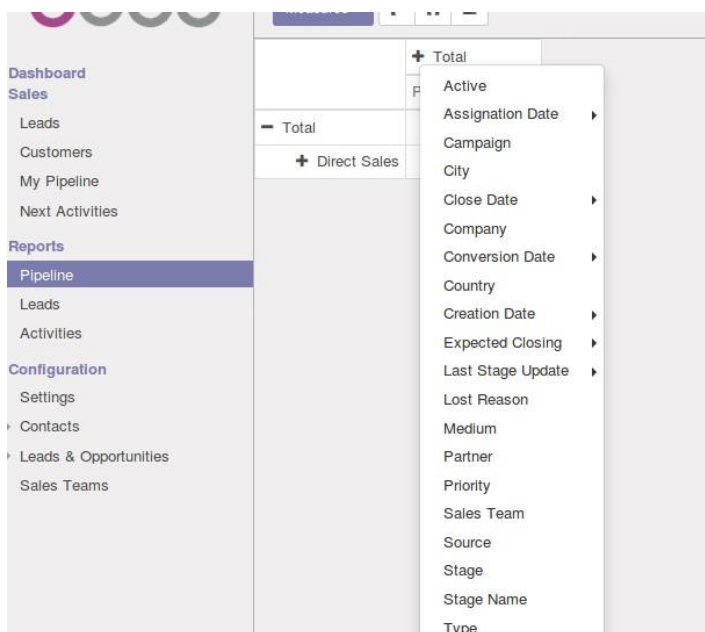
Cancel

- The first option will invoice all the Invoiceable products in this order.
- Second option can be used to deduct the down payment and the other two are for providing down payment.
- If the user creating this invoice does not have access in the accounting section, he can just create the invoice. But he won't be able to see or access it.

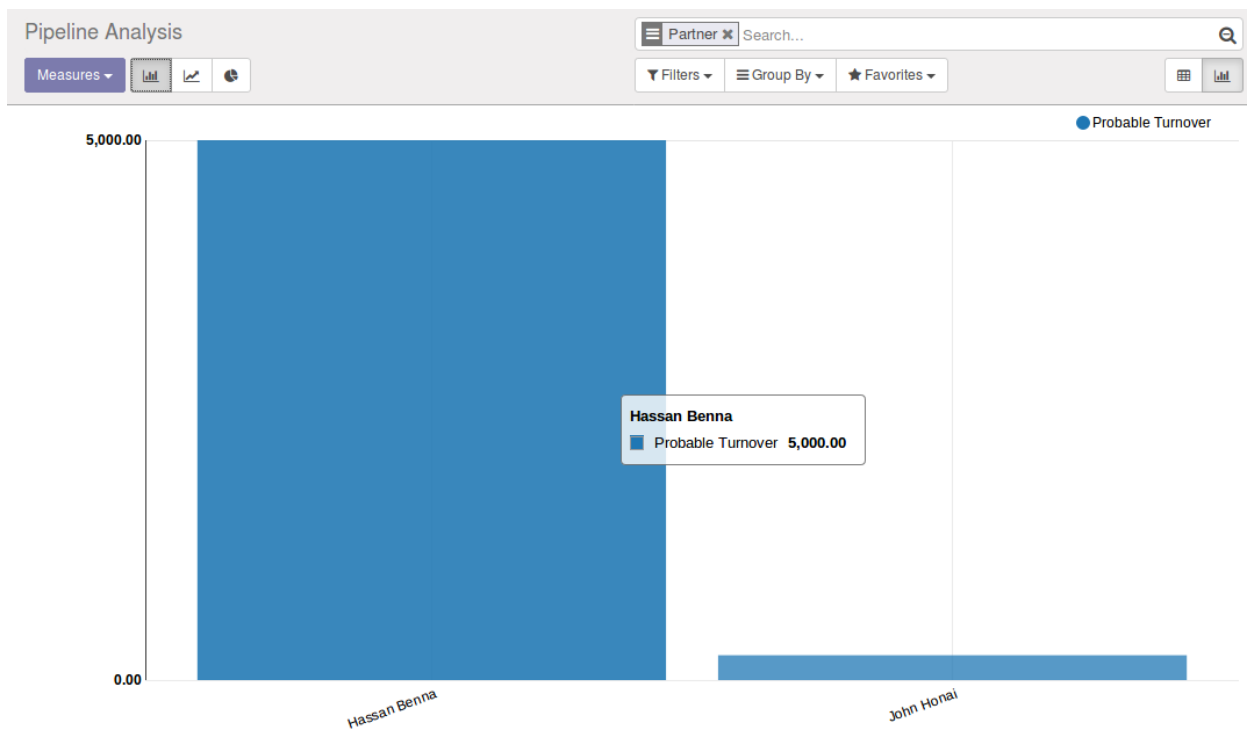
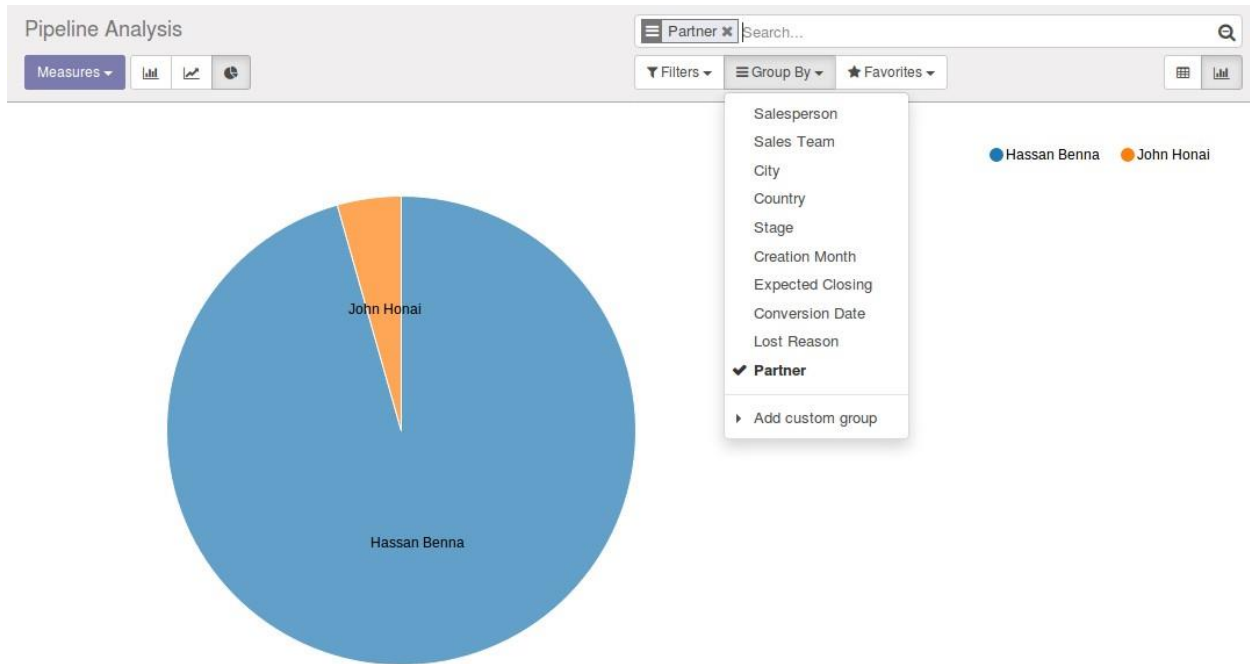
Reporting

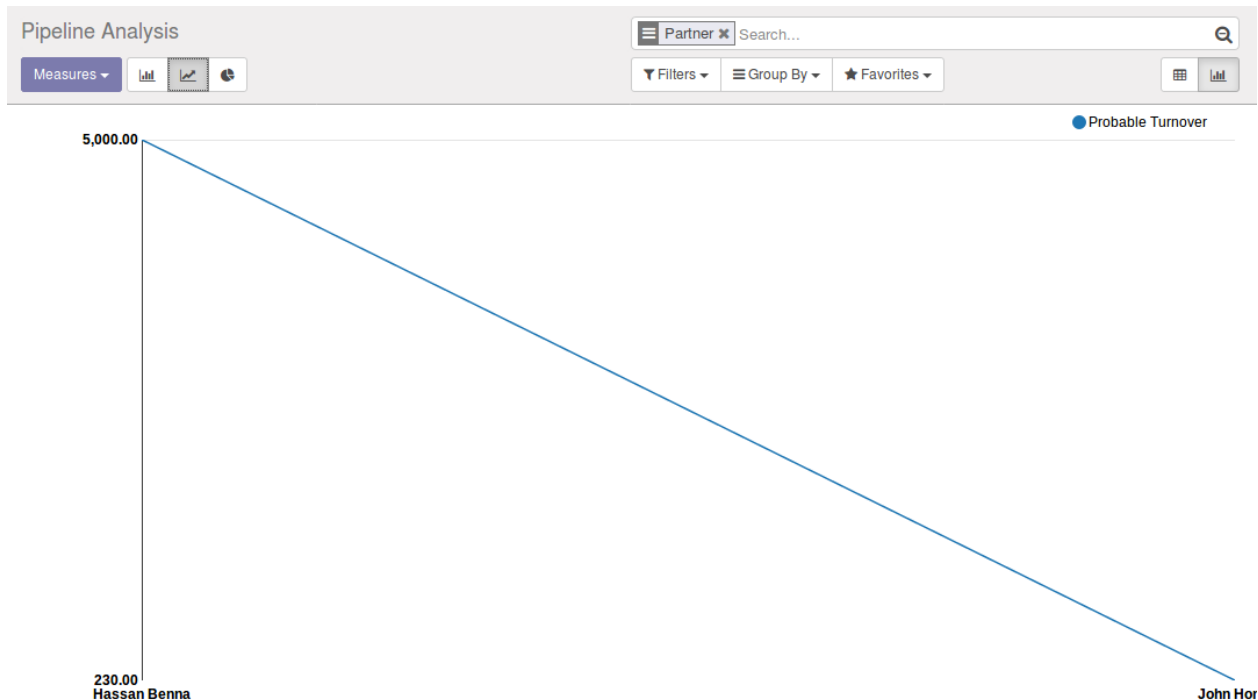
We can access several types of reports in Odoo. It is possible to analyze the Leads and Opportunities based on team, salesperson, state, etc.

- **Sales -> Reports**



Exapmle:-





Other Useful Settings

Order Upsell

- **Sales -> Invoicing -> Orders to Upsell** menu will list the orders having products with an invoicing policy based on ordered quantities for which you have delivered more than what have been ordered

Enable more than one address field for customer

If we need to have three different addresses for customer, delivery and invoice, we need to enable this option from

- **Sales -> Configuration -> Settings -> Address**

Addresses

- ☐ Invoicing and shipping addresses are always the same (Example: services companies)
- ☒ Display 3 fields on sales orders: customer, invoice address, delivery address

After enabling this option, we can see the new fields appeared for entering these addresses.

These addresses will be displayed in the reports also.

Customer	<input type="text"/>
Invoice Address	<input type="text"/>
Delivery Address	<input type="text"/>

Setting up margin for Sales

- Sales -> Configuration -> Settings -> Margin

Margins	<input type="radio"/> Salespeople do not need to view margins when quoting
	<input checked="" type="radio"/> Display margins on quotations and sales orders

After it is enabled, we can see margin option in sale order.

Setting Up Sales Pricelists

To use different prices for products based on customers and other criteria, we can use pricelist

- Sales -> Configuration -> Settings -> Pricing

Pricing

Sale Price	<input checked="" type="radio"/> A single sale price per product
	<input type="radio"/> Specific prices per customer segment, currency, etc.
	<input type="radio"/> Advanced pricing based on formulas (discounts, margins, rounding)

- The first option will allow us to use a fixed price per product.
- Second option, we can set different prices for a product per each customer.
- Third can be used to create more advanced pricing rules.

Define Next Activity

- Sales -> Configuration -> Leads and Opportunities -> Activities -> Create

The screenshot shows the 'Activities / New' form. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'Message Type' text input field. Further down, there are two columns of fields. The left column includes 'Sales Team' (a dropdown menu), 'Description' (a text area), 'Number of days' (a text input with '0' entered), and 'Default' (a checkbox). The right column includes 'Recommended Next Activities' (a dropdown menu).

- Fill the fields and <Save>

Setup Delivery Method

- Sales -> Configuration -> Delivery methods -> Create

The screenshot shows the 'Delivery Methods / New' form. At the top, there are 'Save' and 'Discard' buttons. The main form area is a white box with a light gray border. Inside, the 'Name' field is filled with 'e.g. UPS Express'. To the right of the name field are two toggle buttons: 'Active' (which is selected) and 'Unpublished On Website'. Below the name field, there are two radio buttons for 'Provider': 'Fixed Price' (selected) and 'Based on Rules'. Under 'Fixed Price', there is a 'Margin' field with '0' entered and a '%' symbol. Below this is a link that says 'Install more Providers'. Further down is a 'Description' text area with the placeholder text 'Description displayed on the eCommerce and on online quotations.'. At the bottom, there are two tabs: 'Pricing' (selected) and 'Destination'. Under the 'Pricing' tab, there is a 'Fixed Price' field with '0.00' entered and a checkbox labeled 'Free if Order total is more than'.

- Fill the fields and <Save>
- Don't forget to mark it **Active** and **Publish on Website**

Purchase

Just like the sales, it is really easy to manage our purchases using Odoo. We can generate quotations, convert them to purchase order and generate bills easily. After installing the Purchase Management module from the apps list, we can see the menu item 'Purchases' in our Odoo ERP. Sales and Purchase vouchers, Purchase and MRP management, Purchase requisitions etc. are some other helpful apps which can further enhance purchase management functionalities.

As you all know Purchase is a process of buying goods, service, raw materials and spare parts from suppliers for an organization. Generally, purchase management is one of the most crucial section in an organization. The purchase process in a company should be given the maximum attention. If there is a problem in the purchasing department then problems will arise in the production section, Sales section and will ultimately reduce the performance of the organization. Hence an effective purchase management mechanism is inevitable in any organization. Odoo purchase management can improve your purchase workflow depending on stock levels, sales orders, and forecast manufacturing orders and so on. Here are some features of Odoo purchase management software

Some of the useful features of Odoo Purchase management includes

- **Automate your purchasing workflow:** Here we can automatically send RFQ s- (Request for Quotations) to your suppliers based on your stocks levels. This will improve your purchase and inventory performance along with procurement rules depending on stock levels, logistic rules, and sales orders, forecast manufacturing orders, etc. Select different refill scheme for each product depending on your manufacturing / delivering strategies.
- **Supplier price lists & product availability:** We can easily make efficient purchase decisions using the best prices. With this, we can easily import suppliers' price lists and references to make quick and apt purchase decisions based on different vendor policies, quantities, and special contract conditions. We can easily track the availability of the product in your supplier's inventory and you can also check your order status.
- **Get the best offer with purchase tenders:** Get the best price by bargaining / negotiating with different vendors. We can Launch purchase tenders and simply integrate vendor's answers in the process which help us to compare proposals from different vendors; Choose the best offer and send purchase orders within seconds. We can also use reporting to analyze the proposal of your vendors afterward.

- **Get statistics on your purchases:** Analyze, forecast and efficiently plan your orders in simple steps. Get accurate statistics on your suppliers' performance through flexible reporting delivery delays, negotiated discounts on prices, quantities purchased, etc. Integrate purchases with analytic accounting to analyze your contracts' profitability.
- **Manage several companies:** By using Odoo's multi-company rules we can save time and effort. We can use a single Odoo instance to synchronize operations between different companies. By using this we can create sales orders, share customers, suppliers and products and invoice management for all companies at the same time. You can save even more time by automating the invoicing process between all the companies.
- **Fully integrated with other Odoo Apps:**
 - Inventory:** Synchronize your stocks levels based on your purchases and create automatic replacement rules to avoid the out of stock situation
 - Invoicing:** Convert your purchase orders in a supplier invoice to avoid double entry.
 - Accounting:** Get your accounting more accurate by integrating purchase orders and invoices.
- **Control invoicing:** Odoo ERP purchase module is integrated with inventory, invoice, accounting so you can make the process simple, and accurate.

System Users

There are three types of default user as far as CRM (Including Sales + Purchase + Customer Management) module is concerned.

Manager: - Who will have complete access over all these Sales, Purchase modules

User- Own documents only: - This user will have the permission to control the documents and entries created by him. For example, you can restrict a sales executive from accessing another sales executives documents.

User- All documents: - for example, a Sales Head he has to view documents created by all sales executives.

Odoo Purchase management general workflow.

A Request for Quotation (RfQ): is used when you plan to purchase some products and you would like to receive a quote for those products. In Odoo, the Request for Quotation is used to send your list of desired products to your supplier. Once your supplier has answered your request, you can choose to go ahead with the offer and purchase or to turn down the offer.

A Purchase Tender (PT): also known as Call for Bids, is used to drive competition between several suppliers in order to get the best offer for a list of products. In comparison to the RfQ, a Purchase Tender is sent to multiple suppliers, stating each are competing with one another, and that the best offer will win. The main interest is that it usually leads to better offers.

The Purchase Order (PO): is the actual order that you place to the supplier that you chose, either through a RfQ, a Purchase Tender, or simply when you already know which supplier to order from.

Purchase process starts from the purchase order and ends with the reception of good/service. In Odoo you can either directly create a purchase order (PO) or you can request for a quotation and create PO only after verifying the quote by the vendor. You can choose to go for Purchase Tender in case of competitive bidding. Anyway, every purchase will have a purchase order and the PO will generate an invoice, and depending on the contract with your supplier, you will be required to pay the invoice before or after delivery.

Quotation and Purchase Order

Request for Quotation

The quotation contains the details of the products which we want to purchase from our suppliers.

- **Purchase > Request for Quotation > Create**

Requests for Quotation / PO00001

Save Discard

Send RFQ by Email Print RFQ Confirm Order Cancel RFQ RFQ Sent Purchase Order

Request for Quotation
PO00001

Vendor: John Honai Order Date: 07/03/2017 19:23:22

Vendor Reference:

Products Deliveries & Invoices

Product	Description	Scheduled Date	Quantity	Unit Price	Taxes	Subtotal
+ iPhone 7	iPhone 7	07/03/2017 19:26:35	1.000	7,000.00	(standard)Output Excise Duty @ 12.36%	7,000.00 ₹

Add an Item

An administrator can set up default Terms and conditions in your Company settings.

Untaxed Amount : 7,000.00 ₹
Taxes : 865.37 ₹
Total : 7,865.37 ₹

- Select the **Supplier/Vendor**.
- The order date will be filled automatically, when we create the document.
- The scheduled date in order line specifies that when should we receive the products.

Under Deliveries & invoices Tab you can find other important fields like

Products Deliveries & Invoices

Scheduled Date	09/15/2017 05:30:00	Billing Status	Bills Received
Deliver To	YourCompany: Receipts	Payment Terms	
Incoterm		Fiscal Position	

Deliver To: Indicate delivery location (To know more about location refer inventory)

- Click Confirm Order to create new Purchase Order

Requests for Quotation / PO00001: 7,865.37 ₹

Save Discard

Send PO by Email Receive Products Cancel Lock RFQ RFQ Sent

Purchase Order
PO00001

Vendor John Honai Order Date 07/03/2017 19:23:22

Vendor Reference

Products Deliveries & Invoices

Product	Description	Scheduled Date	Quantity	Unit Price	Taxes	Subtotal
+	iPhone 7	07/03/2017 19:26:35	1.000	7,000.00	(standard)Output Excise Duty @ 12.36%	7,000.00 ₹

Add an item

Click the 'Receive Products' button,

- For receiving the products, the user must be an Inventory Manager.
- The same process can be done via Inventory module too. All the Purchase orders will be listed in inventory section.
- You can view the Shipment status from “Shipments” button

Purchase Orders / PO00001: 7,865.37 ₹ / WH/IN/00001

Edit Create Print Action 1 / 1

Cancel Draft Waiting Availability Partially Available Available

WH/IN/00001

Partner John Honai Scheduled Date 07/03/2017 19:26:35

Source Document PO00001

Operations Initial Demand Additional Info

Product	To Do	Done
iPhone 7	1.000	0.000

Vendor Bill

To create a Bill corresponding to a sale order

- Sales -> Control -> Vendor Bills -> Create

Purchase Orders / PO00001: 7,865.37 ₹ / Vendor Bills / New

Save Discard

Validate Cancel Bill Draft

Draft Bill

Vendor: John Honai Source Document: PO00001

Vendor Reference: Bill Date:

Add Purchase Order: Due Date:

Bill Other Info

Product	Description	Quantity	Unit Price	Discount (%)	Taxes	Amount
+	iPhone 7	PO00001: iPhone 7	1.000	7,000.00	0.00 (standard)Output Excise Duty @ 12.36%	7,000.00 ₹

Add an Item

Tax Description	Tax Account	Amount
		Untaxed Amount : 7,000.00₹

- Choose vendor and sale order from drop down list.
- The bill undergoes three stages namely 'Draft', 'open', 'Paid' for better control over the bill. Admin can set different user to validate those stages

Creating Backorder

When we have fewer products to receive than the ordered, we can create backorders. In order to create a backorder, first, we have to sign in as an inventory user.

- Purchase -> Purchase order
- Select your purchase from list and Click <Shipment> button
- Click <Edit>

Purchase Orders / PO00002: 78,653.68 ₹ / WH/IN/00002

Save Discard

Validate Print Cancel Draft Waiting Availability Partially Available Availab

WH/IN/00002

Partner John Honai Scheduled Date 07/03/2017 19:44:19

Source Document PO00002

Operations Initial Demand Additional Info

Product	To Do	Done
iPhone 7	10,000	4,000

Add an item

- In the 'Done' column, we can enter the number of products which we need to receive this time. If you enter less number of products than in the form then a wizard will appear asking you to confirm creating the backorder.

Create Backorder?

You have processed less products than the initial demand.

Create a backorder, if you expect to process the remaining products later. Do not create a backorder if you will not supply the remaining products.

Create Backorder No Backorder Cancel

Purchase Analysis

Just like in the sales there are several analysis tools available in purchase module. Under the **Reports** menu, we can analyze the purchase and suppliers.

Purchase Analysis		
<div>Measures ▾</div> <div> </div>		
	<div> <div>— Total</div> <div>— July 2017</div> <div>+ iPhone 7</div> </div>	
	<div> <div>— Total</div> <div>— John Honai</div> <div>+ My Company</div> </div>	
	<div> <div> <div>Analytic Account</div> <div>Commercial Entity</div> <div>Company</div> <div>Currency</div> <div>Date Approved</div> <div>Fiscal Position</div> <div>Order Date</div> <div>Order Status</div> <div>Partner Country</div> <div>Product</div> <div>Product Category</div> <div>Product Template</div> <div>Reference Unit of Measure</div> <div>Responsible</div> <div>Vendor</div> <div>Warehouse</div> </div> </div>	<div> <div>Average Price</div> <div>7,000.00</div> <div>7,000.00</div> <div>7,000.00</div> </div>

Vendor management

Since Odoo sales and Purchase module is associated with CRM, there is no separate vendor management in purchase, rather it access Partner management subsystem just like in the Sales module. Using this module we can add persons or entities to our system who can act either as **Customer** or **Vendor** or Both. In purchase module we can access this module under **Purchase > Vendor** tab.

To see detailed vendor/Partner management operations, Refer CRM module.

Product Management

To Purchase any product, we must create a product in our system. Though it is an activity done under inventory management, Odoo Purchase module provide a quick link under **Purchase > Products** tab to perform product management functions like Add Product Update Stock etc. To see the full functionality and processes in Product Management refer Inventory management module.

Other Useful configurations

Purchase Tenders

The purchase tender or call for bids facility can be used in situations where we have a list of products to buy and multiple suppliers for that products. By using purchase tenders, we can get the best offer for the products. We will send the purchase tender to multiple suppliers and they will compete with each other and best offer will win. We will get the best offer. For enabling purchase tenders, go to

- **Purchase -> Settings**

Calls for Tenders

- ☐ Purchase propositions trigger draft purchase orders to a single supplier
- ☒ Allow using call for tenders to get quotes from multiple suppliers (advanced)

- Select the call for tender's option.

After this option is enabled, we can see two new menu items,

'Purchase Agreement Types' and **'Purchase Agreements'**.

The purchase agreement type menu can be used to create the agreement types.

Create Purchase Tender

- Purchase -> Purchase Agreements -> Create

The screenshot shows the 'Create Purchase Tender' form for tender TE00004. The top navigation bar includes buttons for 'Confirm', 'Cancel Call', 'Draft' (highlighted), 'Confirmed', 'Bid Selection', and 'Done'. The form contains the following fields:

- Responsible:** Administrator
- Agreement Type:** Purchase Tender
- Vendor:** (empty)
- Agreement Deadline:** 08/05/2017 11:11:44
- Ordering Date:** (empty)
- Delivery Date:** (empty)
- Source Document:** (empty)

Below the form fields is a 'Products' tab and a table with the following data:

Product	Quantity	Ordered Quantities	Scheduled Date	Unit Price
iPhone-7	1.000		0.00	0.00

- In the **Responsible** field, specify the person responsible for this tender.
- The **Agreement Deadline** field, select the date to bids are closed for suppliers.
- In the **Ordering Date** field, select the date to which you will place the order.

Add the products and the quantity

Now we can see some buttons appeared, new quotation, validate and RFQ/Orders.

The screenshot shows the 'Create Purchase Tender' form for tender TE00005. The top navigation bar includes buttons for 'New Quotation', 'Validate', 'Cancel Call', 'Draft', 'Confirmed' (highlighted), 'Bid Selection', and 'Done'. A badge in the top right corner indicates '0 RFQs/Orders'. The form contains the following fields:

- Responsible:** Administrator
- Agreement Type:** Purchase Tender
- Vendor:** (empty)
- Agreement Deadline:** 08/05/2017 11:19:22
- Ordering Date:** (empty)
- Delivery Date:** (empty)
- Source Document:** (empty)

Below the form fields is a 'Products' tab and a table with the following data:

Product	Quantity	Ordered Quantities	Unit Price
iPhone-7	1.000		0.00

At the bottom of the form, there is a section titled 'Terms and Conditions'.

- Clicking on New Quotation will redirect us to the quotation creation form.
- Once we validate the tender, it will go to the stage 'Bid Selection'. Go to the RFQ which we want to proceed with and confirm the order.
- Now go back to the tender and close the tender by clicking on the button 'Done'.

Purchase Approval

This feature allows us to set multiple levels of approval for the purchase orders. If this feature is enabled, for every purchase order the user creates, approval from the manager is required to confirm the order. If the user creates a quotation and confirms it, it will go to a waiting approval state. The purchase manager can then approve or reject it.

Levels of Approvals *

- ☐ Confirm purchase orders in one step
- ☒ Get 2 levels of approvals to confirm a purchase order

Double validation amount *

500|00

₹

Inventory Management

Inventory is the heart of the business, it is from here all other parts of the business get sufficient energy to live. If properly managed, the business remains healthy, otherwise always messy. Odoo inventory management is a resourceful module which can be utilized by any business organization irrespective of their size. It is designed in such a flexible manner. Odoo inventory is fully integrated with other applications, such as Purchase, Sales or Inventory. But is not limited to those processes, it is also fully integrated with our e-Commerce, Manufacturing and Repairs applications [8]. To Access inventory and warehouse management module in your ERP, you have to install 'Inventory Management' app from Odoo.

Odoo inventory management makes a worthy product to use because of the following features.

- **Clean and Fast**

Odoo Double entry inventory management, flexible design, modern user interface, mobile control and tracking mechanisms make Odoo a clean and fast performing ERP.

- **Basic operation support**

Prepare delivery order in simple steps, control and manage incoming shipments, prepare inventory counts (cycle counts), multiple location management, barcode-based packing, efficient scrap management, stock transfer option etc. Odoo support all the basic and advanced operations takes place in a warehouse.

- **Advanced Routing**

Odoo advanced routing support operations like

Drop-shipping

Deliver to customers straight from your supplier based on products, orders or customers.

Cross-Docking

Unload incoming material and directly transfer to outbound gates with little to no storage in between.

Put away & Removal strategies

Define your own storage and removal strategies; FIFO, nearest available zone, LIFO, etc.

Pick - Pack - Ship

Design your own order process flow. Deliver to customers in one step (delivery order) or several steps: picking, packing, and shipping.

Push & Pull Routes

Design your own product routes to automate transfer orders between warehouses or locations.

Multi-Warehouses

Manage all your warehouses with the same system and define replenishment rules between warehouses.

- **Replenishments**

To keep your inventory properly replenished, Odoo provides options like

Minimum Stock

Have proposition of purchase orders (or request for quotations) created by Odoo based on your future stock forecast.

Purchase Propositions

Get purchase order propositions based on supplier lead times, product demand and inventory forecasts.

Make-to-Order

Purchase raw materials or manufacture products to order. Define your own routes specific to warehouses, products, orders, etc.

Request for Quotations

Want to negotiate a price with suppliers every time you buy a specific product? Odoo can trigger request for quotations automatically based on future needs.

- **Traceability**

Tracking your product inside and outside the inventory is a challenging task. But Odoo traceability features like '*Lots Tracking*', '*Activity Log*', '*Serial Numbers*', '*Perpetual valuation*' make it easier for you.

- **Product Management Features**

Product Types

Odoo supports several product types that have different behavior: physical products, consumables, services, digital products.

Kits

Odoo's kitting features allows your salesperson to sell a kit, but you will deliver a set of products.

Custom fields

Add as many custom fields as you want on products to handle your business needs.

Multi-Level Variants

Define multiple level variants in just a few clicks. Create matrix based on colors, sizes, attributes, etc.

Multiple unit of measures

Odoo supports multiple unit of measures and converts automatically for you: buy a pallet of beer, sell packs of beers.

Expiration Dates

Track expiration dates on products.

Multiple barcodes

Create custom barcodes with specific codes to implement desired behaviors, such as a specific promotion.

- **Business intelligence**

The capability of Odoo BI and reporting tools are already explained in many modules. Odoo BI tools perform similar admirable jobs here in Manufacturing module by providing reports like inventory forecast, customer transaction drilldown reports, perpetual inventory valuation reports etc. [9]

If we compare Odoo Inventory with proprietary ERP Microsoft Dynamics, we can find many features like Freight Carrier Integration, Consignee stock management, etc. are not available there. And if the comparison is between SAP and Odoo, Odoo has the advantage of features like multiple variant support, Up and Down traceability, more effective barcode support etc.[10]

Before going to the detailed operations of Odoo inventory management, let's first explore some of the terms used in the modules. It will give you a better understanding about working Odoo Inventory management system.

Warehouse: A warehouse in Odoo is a location where you store products. It is either a physical or a virtual warehouse. It could be a store or a repository.

Location: Locations are used to structure storage zones within a warehouse. In addition to internal locations (your warehouse), Odoo has locations for suppliers, customers, inventory loss counter-parts, etc.

Lots: Lots are a batch of products identified with a unique barcode or serial number. All items of a lot are from the same product. (E.g. a set of 24 bottle) Usually, lots come from manufacturing order batches or procurements.

Serial Number: A serial number is a unique identifier of a specific product. Technically, serial numbers are similar to having a lot of 1 unique item.

Unit of Measure: Define how the quantity of products is expressed. Meters, Pounds, Pack of 24, Kilograms etc. Unit of measure of the same category (ex: size) can be converted to each other's (m, cm, mm) using a fixed ratio.

Consumable: A product for which you do not want to manage the inventory level (no quantity on hand or forecasted) but that you can receive and deliver. When this product is needed Odoo suppose that you always have enough stock.

Stockable: A product for which you want to manage the inventory level.

Package: A package contains several products (identified by their serial number/lots or not). Example: a box containing knives and forks.

Procurement: A procurement is a request for a specific quantity of products to a specific location. Procurement are automatically triggered by other documents: Sale orders, Minimum Stock Rules, and Procurement rules. You can trigger the procurement manually. When procurements are triggered automatically, you should always pay attention for the exceptions (e.g. a product should be purchased from a vendor, but no supplier is defined).

Routes: Routes define paths the product must follow. Routes may be applicable or not, depending on the products, sales order lines, warehouse, etc. To fulfill a procurement, the system will search for rules belonging to routes that are defined in the related product/sale order.

Push Rules: Push rules trigger when products enter a specific location. They automatically move the product to a new location. Whether a push rule can be used depends on applicable routes.

Procurement Rules or Pull Rules: Procurement rules describe how procurements on specific locations should be fulfilled e.g.: where the product should come from (source location), whether the procurement is MTO or MTS etc.

Procurement Group: Routes and rules define inventory moves. For every rule, a document type is provided: Picking, Packing, Delivery Order, Purchase Order etc. Moves are grouped within the same document type if their procurement group and locations are the same.

Stock Moves: Stock moves represent the transit of goods and materials between locations.

Quantity On Hand: The quantity of a specific product that is currently in a warehouse or location.

Forecasted Quantity: The quantity of products you can sell for a specific warehouse or location. It is defined as the Quantity on Hand - Future Delivery Orders + Future incoming shipments + Future manufactured units.

Reordering Rules: It defines the conditions for Odoo to automatically trigger a request for procurement (buying at a supplier or launching a manufacturing order). It is triggered when the forecasted quantity meets the minimum stock rule.

Cross-Dock: Cross-docking is a practice in the logistics of unloading materials from an incoming semi-trailer truck or railroad car and loading these materials directly into outbound trucks, trailers, or rail cars, with no storage in between. (Does not go to the stock, directly from incoming to packing zone)

Drop-Shipping: move products from the vendor/manufacturer directly to the customer (could be retailer or consumer) without going through the usual distribution channels. Products are sent directly from the vendor to the customer, without passing through your own warehouse.

Removal Strategies: the strategy to use to select which product to pick for a specific operation. Example: FIFO, LIFO, FEFO.

Put away Strategies: the strategy to use to decide in which location a specific product should be set when arriving somewhere. (Example: cables goes in rack 3, storage A)

Scrap: A product that is broken or outdated. Scrapping a product removes it from the stock. [11]

Product variant: Basically, we have two methods to add a product. Product with “Variant” option and standalone product. For example, if you want to add two products say iPhone 7 black, iPhone7 white, to your system. Here you may add two different products or two variants under a single product. Definitely later is the convenient method. To enable this feature, see the topic configurations.


Manage Product

- **Inventory > Inventory control > Product > Create**

Products / New

[Save](#) [Discard](#)

[Update Qty On Hand](#) [Procurement Request](#)



Product Name

☒ Can be Sold

☒ Can be Purchased

☐ Can be Expensed

Active

Unpublished On Website

0 On Hand

0 Forecasted

Traceability

0 Reordering R...

0 Bill of Materials

0 Manufacturing

0 Procurements

0 Purchases

0 Sales

General Information Inventory Sales Variants Invoicing Notes

Product Type: **Stockable Product** Sale Price:

Internal Reference:

Barcode:

HS Code:


Internal Category: **All** Control Purchase Bills: ☐ On ordered quantities ☒ On received quantities

Cost:

All the fields under this form is very important

- **Can be sold** -> Tick this and the product will be listed in sales
- **Can be Purchased** -> tick this and the product will be listed in purchase
- **Can be Expensed** -> if the product is for Internal usage
- **Product type** -> whether the product is **Stackable**, **Consumable**, or **Service**

Fields Under inventory Tab



iMac

☒ Can be Sold

☒ Can be Purchased

☐ Can be Expensed

Active

Published On Website

0 On Hand

0 Forecasted

Traceability

0 Reordering R...

0 Bill of Materials

0 Manufacturing

0 Purchases

0 Sales

General Information **Inventory** Sales Variants Invoicing Notes

Routes: ☐ Buy ☐ Manufacture ☐ Make To Order

Weight: 9.54

Tracking: No Tracking

Volume: 0.00

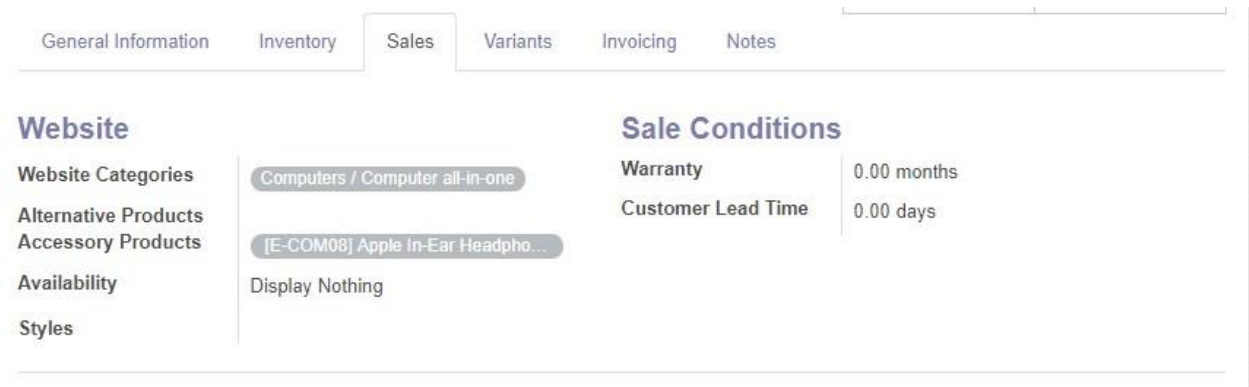
Procurement: [Create a draft purchase order](#)

Vendors

Vendor	Minimal Quantity	Price	Start Date	End Date
ASUSTeK	5.00	1,299.00		
Camptocamp	1.00	1,399.00		

- **Routes:** - The way which your company acquire this product.
- **Vendor:** - Under this section you can add the Vendors (suppliers) of this product
- **Tracking:** - internal tracking mechanism, either via Lot no or via Serial number

Fields under Sales Tab



The screenshot shows the 'Sales' tab of a software interface. It contains two main sections: 'Website' and 'Sale Conditions'. The 'Website' section has a list of categories and products, including 'Computers / Computer all-in-one', '[E-COM08] Apple In-Ear Headpho...', and 'Display Nothing'. The 'Sale Conditions' section shows 'Warranty' as 0.00 months and 'Customer Lead Time' as 0.00 days.

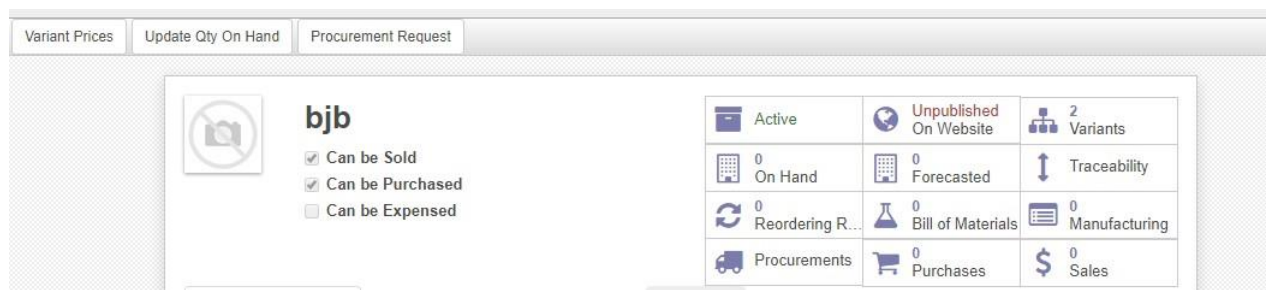
Website Categories: - here you can specify the category under which the product should be displayed in E-commerce website

Alternative/Accessory Product: - associated product to list in Website

Under product Variant tab, as we mentioned earlier, you can add variants of this Products.

- Click <Add an Item>
- add an Attribute for ex: color
- then add attribute Values

Based on the Attributes and values you provided, system will generate all combinations of variations under “Variants Button”.



The screenshot shows the 'Variant Prices' tab of a software interface. It displays a product 'bjb' with three attributes: 'Can be Sold' (checked), 'Can be Purchased' (checked), and 'Can be Expensed' (unchecked). To the right, a table shows various metrics for the product:

Active	Unpublished On Website	2 Variants
0 On Hand	0 Forecasted	Traceability
0 Reordering R...	0 Bill of Materials	0 Manufacturing
0 Procurements	0 Purchases	0 Sales

Like this

<input type="checkbox"/> Internal Reference	Name	Attributes	Sale Price	Quantity On Hand	Forecast Quantity	Barcode
<input type="checkbox"/>	bjb	Memory: 16 GB		1.00	0.000	0.000
<input type="checkbox"/>	bjb	Memory: 32 GB		1.00	0.000	0.000

- You may delete any variant you don't have.
- Follow Variant Price tab to adjust prices of all variants

Note: - You can update inventory attributes like Quantity in Hand and Procurement request etc. from the same window

Note: - You can Update/Delete a product information from same menu i.e. *Inventory > Inventory control > Product*

General Configurations

- **Inventory> Configuration> Settings> Products**

Products

Units of Measure

- ☐ Products have only one unit of measure (easier)
- ☒ Some products may be sold/purchased in different units of measure (advanced)

Product Variants

- ☐ No variants on products
- ☒ Products can have several attributes, defining variants (Example: size, color,...)

Packaging Methods

- ☒ Do not manage packaging
- ☐ Manage available packaging options per products

- **Unit of Measure:** By ticking the second option you can Sale/Purchase products in a different unit of measure. For example, you may buy Bottle as a dozen and sell it individually.
- **Product Variant:** - Tick here to include product variance in inventory.

- **Inventory> Configuration> Settings> Traceability**

Traceability

Lots and Serial Numbers	<input type="radio"/> Do not track individual product items <input checked="" type="radio"/> Track lots or serial numbers
Expiration Dates	<input checked="" type="radio"/> Do not use Expiration Date on serial numbers <input type="radio"/> Define Expiration Date on serial numbers
Packages	<input checked="" type="radio"/> Do not manage packaging <input type="radio"/> Record packages used on packing: pallets, boxes, ...
Product Owners	<input checked="" type="radio"/> All products in your warehouse belong to your company <input type="radio"/> Manage consignee stocks (advanced)
Barcode Interface	<input type="checkbox"/> Barcode scanner support Enterprise More Info

- **Lots and Serial Numbers:** - This field specify how you track your item in inventory.

- **Inventory> Configuration> Settings> Location and Warehouse**

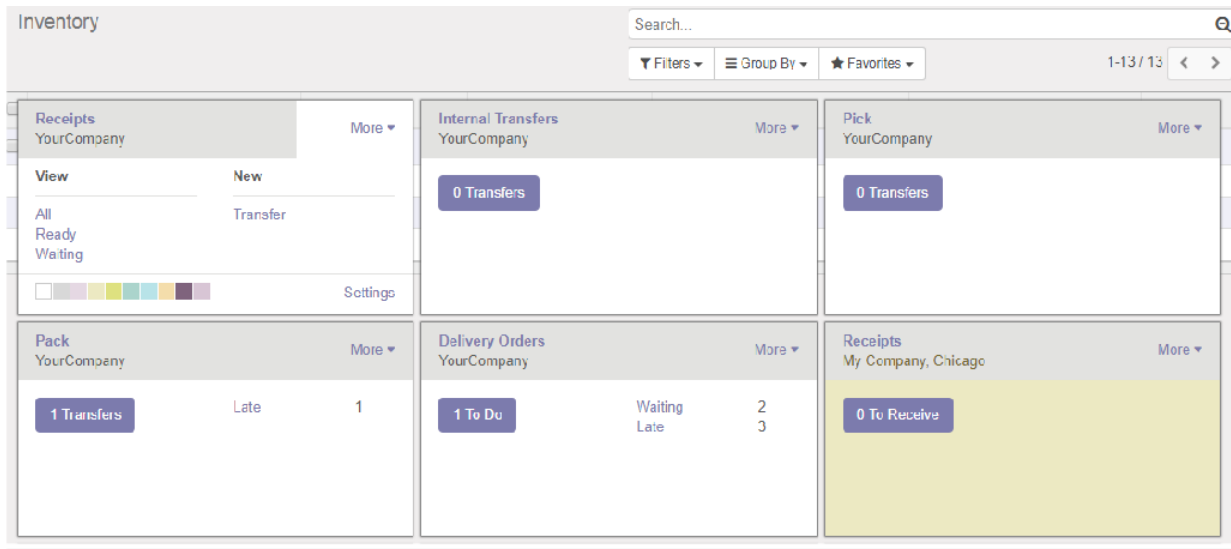
Location & Warehouse

Procurements	<input checked="" type="radio"/> Reserve products immediately after the sale order confirmation <input type="radio"/> Reserve products manually or based on automatic scheduler
Warehouses and Locations usage level	<input type="radio"/> Manage only 1 Warehouse with only 1 stock location <input type="radio"/> Manage only 1 Warehouse, composed by several stock locations <input checked="" type="radio"/> Manage several Warehouses, each one composed by several stock locations
Routes	<input type="radio"/> No automatic routing of products <input checked="" type="radio"/> Advanced routing of products using rules Minimum days to trigger a propagation of date change in pushed/pull flows. <input type="text" value="0"/>
Products	Decimal precision on weight <input type="text" value="0"/>
Dropshipping	<input checked="" type="radio"/> Suppliers always deliver to your warehouse(s) <input type="radio"/> Allow suppliers to deliver directly to your customers
Picking Waves	<input checked="" type="radio"/> Manage pickings one at a time <input type="radio"/> Manage picking in batch per worker
Minimum Stock Rules	<input checked="" type="radio"/> Set lead times in calendar days (easy) <input type="radio"/> Adapt lead times using the suppliers' open days calendars (advanced)
Warning	<input checked="" type="radio"/> All the partners can be used in pickings <input type="radio"/> An informative or blocking warning can be set on a partner

- **Procurement:** - choose the method to **Reserve** a product, after a sale order is confirmed. In second option you can set a scheduler to reserve product
- **Warehouses and Location level:** - Choose according to your usage level
- **Routes:** - Choose advanced routing, if your procurement contain more than one step
- **Drop shipping:** - this allows you to configure different delivery option for your suppliers.

Dashboard

Dashboard give a glimpse to all the operations in your Warehouses.



- Click **<More>** to view all the operations in the warehouse

Inventory -> Operations -> All Transfers

Stock Operations

Create

Import

Search...

▼ Filters ▼

≡ Group By ▼

★ Favorites ▼

1-30 / 30

<

>

≡

≡

📄

<input type="checkbox"/>	Reference	Destination Location Zone	Partner	Scheduled Date	Source Document	Back Order of	Status
<input type="checkbox"/>	Chic/IN/00004	Chic/Stock	ASUSTeK	08/01/2017 17:05:58	chicago_warehouse		Available
<input type="checkbox"/>	WH/OUT/00003	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:54	outgoing shipment your_company warehouse		Draft
<input type="checkbox"/>	WH/OUT/00005	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:54	outgoing shipment	WH/OUT/00002	Done
<input type="checkbox"/>	WH/OUT/00002	Partner Locations/Customers	ASUSTeK		outgoing shipment		Draft
<input type="checkbox"/>	WH/OUT/00001	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:53	outgoing shipment main_warehouse		Available
<input type="checkbox"/>	WH/IN/00002	WH/Stock	ASUSTeK	08/01/2017 17:05:55	incoming_shipment		Available
<input type="checkbox"/>	WH/IN/00001	WH/Stock		08/01/2017 17:05:55	incoming_shipment for test		Draft
<input type="checkbox"/>	WH/OUT/00004	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:55	your company warehouse		Draft
<input type="checkbox"/>	WH/IN/00004	WH/Stock	ASUSTeK	08/01/2017 17:05:56	incoming_shipment your_company warehouse		Available
<input type="checkbox"/>	WH/IN/00003	WH/Stock	ASUSTeK	08/01/2017 17:05:56	incoming_shipment main_warehouse		Available
<input type="checkbox"/>	Chic/IN/00002	Chic/Stock	ASUSTeK	08/01/2017 17:05:57	incoming_shipment_chicago_warehouse		Done

- You can see all confirmed Sales and Purchase orders listed here.
- You can click and view the status of each one.

Edit
Create

Print
Attachment(s)
Action

2 / 30

Mark as Todo
Validate
Cancel
Draft
Waiting Availability
Partially Available
Available
Done

WH/OUT/00003

PartnerASUSTeK
Destination Location ZonePartner Locations/Customers

Scheduled Date08/01/2017 17:05:54
Source Documentoutgoing shipment your_company warehouse

Initial Demand
Additional Info

Product	Quantity	Unit of Measure	Status
[PROD_DEL02] Datacard	45.000	Unit(s)	New

Warehouse Configuration

You can add any number of warehouses under your company. As we mentioned earlier we can have multiple ware houses.

- Inventory > Configuration > Warehouse Management >Warehouses ->Create

Warehouse Name

Active
Routes

Short Name
Address

Warehouse Configuration

Incoming Shipments

Receive goods directly in stock (1 step)
Unload in input location then go to stock (2 steps)
Unload in input location, go through a quality control before being admitted in stock (3 steps)

Outgoing Shippings

Ship directly from stock (Ship only)
Bring goods to output location before shipping (Pick + Ship)
Make packages into a dedicated location, then bring them to the output location for shipping (Pick + Pack + Ship)

Purchase to resupply this warehouse

Default Resupply Warehouse
Resupply Warehouses

☒

☐ YourCompany
☐ My Company, Chicago
☐ Chicago Warehouse

Choose **Incoming Shipment** and **Outgoing Shipment** settings, you can choose any of your existing warehouses for **Resupply**. <Save> it and <Activate> it.

Note: - you can Update/Delete this Warehouse details from same menu i.e. **Inventory > Configuration > Warehouse Management >Warehouses**.

Locations

Locations are different places in your warehouse. Or these are the different sections in your warehouse where different types of actions are done. You can add single or multiple locations. A location means a space in the warehouse, a shelf, a floor, etc. A location is part of one warehouse and it is not possible to link to another warehouse. Actually all In and Out transactions are carried out and Recorded through Locations. (If you look into Purchase order, you can see **Deliver to** option, which essentially indicates a location)

There are three types of location

- Physical Location
These are Locations in your warehouse
- Partner Location
This location not under your warehouse
- Virtual Location
This is a virtual location which is not available physically

You can view all the locations available under your company from

- **Inventory -> Configurations -> Locations**

Locations	
Create Import	<div>Internal Search...</div> <div>Filters Group By Favorites</div> <div>1-12 / 12 < ></div>
<input type="checkbox"/> Display Name	Location Type
<input type="checkbox"/> Chic/Stock	Internal Location
<input type="checkbox"/> My Co/Stock	Internal Location
<input type="checkbox"/> WH/Input/Order Processing	Internal Location
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone	Internal Location
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location
<input type="checkbox"/> WH/Input/Order Processing/Dispatch Zone/Gate B	Internal Location
<input type="checkbox"/> WH/Output	Internal Location
<input type="checkbox"/> WH/Packing Zone	Internal Location
<input type="checkbox"/> WH/Stock	Internal Location
<input type="checkbox"/> WH/Stock/Shelf 1	Internal Location
<input type="checkbox"/> WH/Stock/Shelf 2	Internal Location
<input type="checkbox"/> WH/Stock/Shelf 2/Small Refrigerator	Internal Location

Create a Location

- **Inventory > Configurations > Locations > Create**

Locations / New

Save

Discard

Location Name

Active

Current Stock

Products

Parent Location

Additional Information

Location Type

Inventory Loss

Owner

Is a Scrap Location?

Is a Return Location?

Localization

Corridor (X)

0

Shelves (Y)

0

Height (Z)

0

Barcode

Accounting Information

Stock Valuation Account (Incoming)

Stock Valuation Account (Outgoing)

Logistics

Removal Strategy

Put Away Strategy

- **Parent location:** - in case you are creating a location under another location (location hierarchy)
- **Owner:** - Choose a user to manage it

- Fill all other necessary fields and click **<Active>** and **<Save>**

Note: you can Update/delete a Location information from the same menu.

Operations

Operation means, different operations carried out in your ware house like Receipts, Internal Transfer, and Delivery Order. These are basic operations carried out in a warehouse. However, you can add more custom operations from

- **Inventory -> Configuration -> warehouse management -> Operation Types -> Create**

Active

Picking Type Name:

Reference Sequence:

Warehouse:

Type of Operation:

Picking Type for Returns:

Packs and Lots

Create New Lots/Serial Numbers: ☒

Use Existing Lots/Serial Numbers: ☒

Locations

Default Source Location:

Default Destination Location:

- Fill the operation details and click **<Activate>** and **<Save>** now these operation will be listed in your Dashboard.

Routes

it is the different possible ways through which a product is acquired or sold from your warehouse. You can simply follow single step process (like vendor's warehouse to your warehouse) or can configure multiple step routs. You can see a field asking the Rout while creating a Product. Rout ensures a sale or purchase product is properly tracked.

You can view all the Routes from

- **Inventory > Configuration > Routes**

Routes		Search...
<input type="button" value="Create"/>	<input type="button" value="Import"/>	<input type="text" value="Filters"/> <input type="text" value="Group By"/> <input type="text" value="Favorites"/>
1-8 / 8	<	>
<input type="checkbox"/>	Route Name	
<input type="checkbox"/>	+ Buy	
<input type="checkbox"/>	+ My Company, Chicago: Receipt in 1 step	
<input type="checkbox"/>	+ My Company, Chicago: Ship Only	
<input type="checkbox"/>	+ Chicago Warehouse: Receipt in 1 step	
<input type="checkbox"/>	+ Chicago Warehouse: Ship Only	
<input type="checkbox"/>	+ YourCompany: Pick + Pack + Ship	
<input type="checkbox"/>	+ Make To Order	
<input type="checkbox"/>	+ YourCompany: Receipt in 1 step	

You may define new Rout rules from

- **Inventory > Configuration > Routes > Create**

Route Name

YourCompany: Pick + Pack + St

Active

Applicable On

Select the places where this route can be selected

Product Categories ☒ Warehouses ☐

Products ☐ Sale Order Lines ☐

Push Rules

Source Location	Destination Location	Operation Name
Add an item		

Procurement Rules

Name	Action	Picking Type
WH: Output -> Customers	Move From Another Location	YourCompany: Delivery Orders
WH: Packing Zone -> Output	Move From Another Location	YourCompany: Pack
WH: Stock -> Packing Zone	Move From Another Location	YourCompany: Pick
Add an item		

- Tick **Product categories** to view the Rule in Product category also
- Choose the Ware house
- Click **Add an Item** to add new Rule.

Open: Procurement Rules

Name

WH: Packing Zone -> Output

Active

Action Sequence

Applied On

Procurement Location

Creates

Source Location

Move Supply Method

Picking Type

Partner Address

Delay days

Save Discard

Here the **Action** Indicate exact physical action done. (In this picture it is, 'Move from Another Location', consequently you have to fill source and destination Locations.)

Or you can choose **Buy**

Open: Procurement Rules

Name: WH: Packing Zone -> Output

Action: Buy

Sequence: 20

Applied On: Procurement Location: WH/Output

Creates: Picking Type: YourCompany: Pack

Save Discard

- Save the Rule and add another Rule if needed. Otherwise click **<active>** and **<save>** Route.

Unit of Measure

Different products have different unit of measure. You can Configure all these unit of measures to you inventory.

- **Inventory > Configurations > Unit of Measure > Create**

Units of Measure / cm

Save Discard

1 / 19

Unit of Measure: cm

Category: Length / Distance

Type: Smaller than the reference Unit of Measure

Ratio: 100.00000

Active: ☒

Rounding Precision: 0.01000

e.g: 1 * (reference unit) = ratio * (this unit)

- **Unit of Measure:** - Name of UM
- **Category:** - you may add new category or select from an existing one.

➤ **Type:** - here you have three options;

Reference Unit- Means, this will be the base unit for all units in this category (for example we can set **Meter** as base for length category.)

Bigger than reference unit- Example, if meter is reference unit the while you add KM you must choose this option

Smaller than reference unit- opposite of the above

➤ **Ratio:** - ratio between Reference unit and other unit

Reordering Rules

You can create a custom Rule to replenish your Inventory automatically. For example, if you wish to re-order a product when the stock reaches 10 units. You can set a Rule, and when you **Run Scheduler** system will check this Rule and take appropriate action automatically.

- **Inventory > Inventory Control > Reordering Rules > Create**

Reordering Rules / New

Save Discard

Active Procurements

Name: OP/00005

Product: [C-Case] Computer Case

Warehouse: YourCompany

Product Unit of Measure: WH/Stock

Location: WH/Stock

Procurement Group:

Rules

Minimum Quantity: 0.000

Maximum Quantity: 0.000

Quantity Multiple: 1.000

Misc

Lead Time: 1

Day(s) to puri: ▾

- **Minimum Quality:** - minimum number of quantity should be kept in inventory
- **Maximum Quantity:** - Quantity upper limit
- **Quantity Multiple:-** Lowest number of items can be ordered at once
- **Procurement Group:** - Set procurement and Picking option

Create: Procurement Group

Procurements

Pickings

Reference

PG/000002

Delivery Type

Partial

Save

Discard

- **Activate** and **Save** the Rule.

Inventory Update

You can update stock details in two ways, first one is via going to product details and update individually. You can update multiple product details also.

- **Inventory > Inventory Adjustments > Create**

Inventory Adjustments / New

Save

Discard

Start Inventory

Draft

In Progress

Validated

Inventory Reference

Annual Maintanance

Inventoried Location

WH/Stock

Inventory Date

09/19/2017 11:00:29

Inventory of

☒ All products

☐ One product category

☐ One product only

☐ Select products manually

☐ One Lot/Serial Number

Include Exhausted Products

☐

Force Accounting Date

- Give a Name, select the required products and click **Start Inventory**

Inventory Adjustments / Annual Maintenance

Edit Create Print Attachment(s) Action 4 / 4

Validate Inventory Cancel Inventory Draft In Progress Validated

Annual Maintenance

Inventoried Location: WH/Stock
 Inventory of: All products
 Include Exhausted Products: ☐

Inventory Date: 09/19/2017 11:04:41
 Force Accounting Date:

Inventory Details

⇒ Set quantities to 0

Product	UoM	Location	Lot/Serial Number	Theoretical Quantity	Real Quantity
[E-COM08] Apple In-Ear Headphones	Unit(s)	WH/Stock/Shelf 1		18.000	18.000
[E-COM10] Apple Wireless Keyboard	Unit(s)	WH/Stock/Shelf 1		21.000	21.000
[FURN004] Bolt	Unit(s)	WH/Stock		-4.000	-4.000
[E-COM05] Bose Mini Bluetooth Speaker	Unit(s)	WH/Stock/Shelf 2		8.000	8.000
[C-Case] Computer Case	Unit(s)	WH/Stock		7.000	7.000
[FURN001] Computer Desk	Unit(s)	WH/Stock		1.000	1.000
[PCSC234] Computer SC234	Unit(s)	WH/Stock		4.000	4.000
[PROD_DEL02] Datacard	Unit(s)	WH/Stock		15.000	15.000

- You can change the stock details by clicking over the product quantity.
- Commits the changes and click <Validate>

Scrap

To record the scrap products in your inventory.

- Inventory > Inventory Control > Scrap > Create

Scrap / New

Save Discard

Draft Done

New

Product: [CONS_DEL01] Server
 Quantity: 1.00 Unit(s)

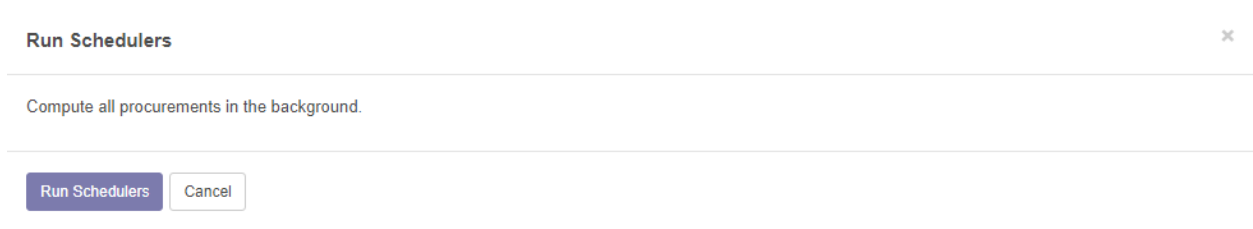
Location: WH/Stock
 Scrap Location: Virtual Locations/Scrapped
 Source Document:
 Expected Date: 09/19/2017 11:07:08

- Fill the Scrap product details and **Save**

Scheduler

Run Scheduler will check all the **Reordering Rules** you created and make appropriate action.

- **Scheduler > Run Scheduler**

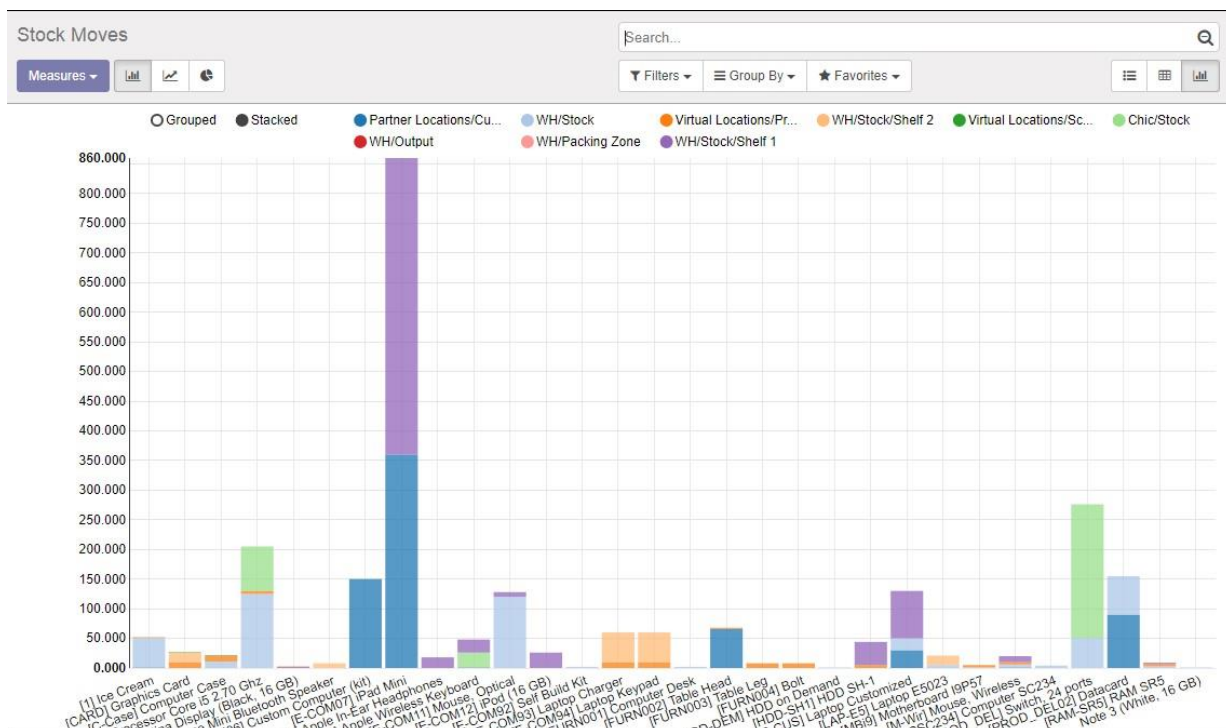


- Click **Run Scheduler**

Reports

Odoo inventory management system provides the user very effective and simple reports to make more wise decisions. You can access reports from

- **Inventory->Reports**



Manufacturing

Manufacturing is a process of converting raw materials or components into finished goods or products. For a company which handle large quantity of manufacturing products have to track every manufacturing orders efficiently. The Manufacturing Module in Odoo help you to handle the complexity of Production, Manage Bills of Materials, Plan Manufacturing Orders, and Track Work Orders etc. Manufacturing module is one of the basic application in Odoo. You have to install 'Manufacturing' app from Odoo Apps to avail this module on your ERP. Since the Manufacturing module is highly integrated with Inventory Management, you can keep your inventory automatically updated with each manufacturing process.

Working methodology is very simple in Odoo manufacturing. You can create a Manufacturing Order of a product and pass it through your different stages in production line and complete production. You may customize manufacturing procedure matching your company's process using WorkCentre and routing concepts. You can easily manage 'Scraps' during any stage of manufacturing procedure and 'Unbuild' a manufactured product if needed. Organization may assign different level users to overlook the entire manufacturing procedure for effective management of entire process.

If we compare Odoo manufacturing module with other ERP solution, like in all other modules we can find lot of unique feature which Odoo alone have. For example, features like byproducts, routing facility, single BOM for multiple product variant, MRP II scheduler, Master production scheduler, Kanban Planning, Production calendar, backward scheduling, Work orders, Repair etc. Are not available in SAP ERP while Odoo implement all of them. And against Microsoft Dynamics, Odoo have the advantage of features like Equipment / Machine Management, Work Instructions on Work Orders, Maintenance Requests from Shop Floor Terminal, Production calendar etc. [12]

Following features [13] make Odoo manufacturing module an efficient one.

- **Manage**

- Manufacturing orders*

- Manage your products into assembly lines or manual assembly.

- Work orders*

- Launch production of items needed in the final assembly of your products.

- Repair orders*

- Manage repairs of items under warranty or as a service.

- **Schedule & plan**

- Plan manufacturing***

- Get a clear view on your whole planning and easily reschedule manufacturing.

- Organize work orders***

- Have access to all available resources and plan ahead with your production.

- Manage Bill of Materials***

- Keep track of availability of items in stock and production time.

- WorkCentre Capacity***

- MRP II scheduler using capacities and schedules of WorkCentre.

- **Define Flexible Master Data**

- Create multi-level Bills of Materials***

- Set a Bill of Materials within another in order to manufacture components of a product in another Bill of Materials.

- Optional routing***

- Create new routings for work orders in order to sequence your production depending on the routing used.

- Version changes***

- Allow your products to evolve and add configurable options when creating orders.

- Phantom of Bill of Materials***

- Create phantom BoM to manufacture and sell products in kits or to build replacement parts.

- **Quality**

- Control Points***

- Automatically trigger quality checks for the manufacturing department.

- Quality Checks***

- Deploy your statistical process control easily with checks.

- Quality Alerts***

- Organize your work using the Kanban view of quality alerts.

- **Maintenance**

- Preventive Maintenance***

- Trigger maintenance requests automatically based on KPIs.

- Corrective Maintenance***

- Trigger corrective maintenance directly from the control center panel.

- Calendar***

- Schedule maintenance operations with a calendar.

Statistics

Get all maintenance statistics computed for you: MTBF

- **WorkCentre Control Panel**

Tablets

Set tablets on every work center to organize their work efficiently.

Record production

Register productions, scan products, lots or serial numbers.

Worksheets

Display worksheets directly on the WorkCentre with instructions for operator.

Misc. Operations

Scrap products, create quality alerts, and perform checks, right from the WorkCentre.

Alerts

Use alerts to show changes or quality checks to the operator. [13]

- **Business Intelligence**

Get detailed analysis report on your production line, analyze the performance of your work centers and production, plan alternative production strategies etc. are some of the qualitative measures Odoo BI engine can suggest to you in manufacturing module.

System Users

By default there are two types of user in manufacturing modules.

- **Manager:** - He is the one who manages everything, including Create BOM, Work Order, Routing procedure etc.
- **User:** - Generally he can create a manufacturing order and process it. But manager can grant more permission to this user if needed.

Manufacturing Order Management

There are two ways we can produce a product with Odoo manufacturing App. We can create a manufacturing order with simple default stages and complete the production. Or we can customize our work order by setting up work center and routing mechanisms.

Create a Manufacturing Order (Simple Method)

- **Manufacturing > Operations > Manufacturing Orders > Create**

The screenshot shows the Odoo Manufacturing Order creation interface. The top navigation bar includes 'Discuss', 'Inventory', and 'Manufacturing'. The left sidebar shows 'Operations' with 'Manufacturing Orders' selected, and 'Master Data' with 'Products', 'Bill of Materials', and 'Reporting' with 'Manufacturing Orders'. The main area displays 'Manufacturing Orders / MO/00001'. It has buttons for 'Edit', 'Create', 'Print', and 'Action'. Below these are buttons for 'Check availability', 'Produce', 'Cancel', 'Scrap', and a red warning 'Raw materials not available!'. On the right, there are status buttons: 'Confirmed', 'In Progress', and 'Done'. The form itself is titled 'MO/00001' and contains fields for 'Product' (iPhone 7), 'Quantity To Produce' (1.000), 'Bill of Material' (iPhone 7), 'Deadline Start' (07/03/2017 09:11:21), 'Responsible' (John Doe), and 'Source'. Below these fields are three tabs: 'Consumed Materials', 'Finished Products', and 'Miscellaneous'. The 'Consumed Materials' tab is active, showing a table with columns 'Product', 'Quantity Available', 'To Consume', and 'Consumed'. The table has one row for 'iphone components' with values 0.000, 1.000, and 0.000 respectively.

- Choose a product from list (or you may create new one)
- Choose Bill of Material
- Finished product tab will show you the number of finished products.
- Consumed Material tab will display the material consumed for the production
- Click “Check availability” to see the availability of raw materials in inventory.

Manage Production

Once you have created and confirmed a Manufacturing order, you can start production. Odoo will list all the Manufacturing orders under **Manufacturing -> Operations -> Manufacturing Orders**. You can view the status of all ongoing manufacturing order from here.

<input type="checkbox"/>	Reference	Deadline Start ▼	Product	Quantity	Availability	Routing	Source	State
<input type="checkbox"/>	MO/00009	09/16/2017 09:11:19	[LAP-CUS] Laptop Customized	1.000	Available	Custom Assembly Line		In Progress
<input type="checkbox"/>	MO/00007	09/15/2017 16:50:25	[E-COM92] Self Build Kit	1.000	Waiting	Manual Component's Assembly		Planned
<input type="checkbox"/>	MO/00005	09/15/2017 16:01:53	[PCSC234] Computer SC234	1.000	Waiting	Assembly Line 1		Planned
<input type="checkbox"/>	MO/00003	08/01/2017 17:12:05	[FURN001] Computer Desk	1.000	Waiting	Assemble Furniture		Confirmed
<input type="checkbox"/>	MO/00001	08/01/2017 17:12:03	[PCSC234] Computer SC234	3.000	Partially Available	Assembly Line 1		Planned
				7.000				

Select a Manufacturing Order from list.

Manufacturing Orders / MO/00002

[Edit](#) [Create](#) [Print](#) [Action](#)

[Produce](#) [Cancel](#) [Scrap](#) [Unreserve](#)

[Confirmed](#) [In Progress](#) [Done](#)

MO/00002

Product: iPhone 7
 Quantity To Produce: 10.000 [Update](#)
 Bill of Material: iPhone 7

Deadline Start: 07/03/2017 13:51:04
 Responsible: John Doe
 Source:

[Consumed Materials](#) [Finished Products](#) [Miscellaneous](#)

Product	Quantity Available	To Consume	Consumed
iphone components		5.000	5.000
iphone components			5.000

- Since Odoo support negative inventory support you can start production even without ensuring the raw material availability.
- Click “Produce” to start production.

Once you start production the status bar will change as follows

[Mark as Done](#) [Post Inventory](#) [Scrap](#) [Unreserve](#)

[Confirmed](#) [In Progress](#) [Done](#)

- “Mark as Done” to complete the production process
- “Post inventory” to update inventory movements.

Note: - You can “**unreserve**” any raw material from manufacturing order to make it available to inventory, Click “**Unreserve**” button on progress Tab to take this action.

Note: - you can Update/Delete any manufacturing order from **Manufacturing -> Operations -> Manufacturing Orders Tab**.

Create a Manufacturing Order (Advanced Method)

Comparing to simple method, advanced method provide each company to configure more detailed manufacturing process such as setting up **Work Centers**, **Routing**, **Work Order** management etc.

To enable this feature

- **Manufacturing -> Settings -> Manufacturing Order**

Manufacturing Order

Product Variants

- ☐ No variants on products
- ☒ Products can have several attributes, defining variants (Example: size, color,...)

By-Products

- ☐ No by-products in bills of materials (A + B --> C)
- ☒ Bills of materials may produce residual products (A + B --> C + D)

Routings & Planning

- ☐ Manage production by manufacturing orders
- ☒ Manage production by work orders

-
- **Enable 'Manage Production By Work Orders'**

This will enable new menu in dashboard to manage Work Center, Routing and Work Order.

- **Manufacturing -> Operations -> Manufacturing Order -> Create**

The screenshot shows the 'New Manufacturing Order' form. At the top, there's a breadcrumb 'Manufacturing Orders / New' and buttons for 'Save' and 'Discard'. Below this is a progress bar with 'Cancel', 'Confirmed', 'In Progress', and 'Done' stages. The main form area is titled 'New' and contains several input fields: 'Product' (a dropdown menu), 'Quantity To Produce' (a text box with '1.000' and an 'Update' button), 'Bill of Material' (a dropdown menu), 'Routing' (a dropdown menu), 'Deadline Start' (a date/time picker showing '09/16/2017 10:59:14'), 'Responsible' (a dropdown menu showing 'Administrator' with an external link icon), and 'Source' (a text box). Below these fields are three tabs: 'Consumed Materials', 'Finished Products', and 'Miscellaneous'. The 'Consumed Materials' tab is active, showing a table with columns: 'Product', 'Quantity Available', 'To Consume', and 'Consumed'. The table is currently empty.

- Fill the fields same as before.
- Select a 'Routing' mechanism, this will be automatically filled once you choose the BoM.

The Status bar will give you a new option **Create Work Order**, Click it to create the work order according to your routing plan

- In new Window you will have an option to Check Availability of raw material. (Odoo support negative inventory)
- Click **<Save>**
- Unlike in simple method now you just created a **Work Order**, the production process has not started yet.

Manage Production

To Start Production you have **two** option either

- Open a manufacturing order and Click **“Work Order”** button in the form.

Manufacturing Orders / MO/00011

Save Discard 6 / 6 < >

Cancel Scrap Unreserve Confirmed **Planned** In Progress Done

MO/00011 0 / 3 Work Orders

Product [LAP-CUS] Laptop Customized Deadline Start 09/16/2017 10:59:14

Quantity To Produce 5.000 Update Responsible Administrator

Bill of Material 123: [LAP-CUS] Laptop Customized Source

Routing Custom Assembly Line

Consumed Materials Finished Products Miscellaneous

Product	Quantity Available	To Consume	Consumed
[CARD] Graphics Card	5.000	5.000	0.000
[C-Case] Computer Case	5.000	5.000	0.000

- Or you can access all your work orders from **“Manufacturing > Operations > Work Order”**

Work Orders

In Progress or Ready Search...

Filters Group By Favorites 1-5 / 5 < >

[PCSC234] Computer SC234 1.000 Unit(s) MO/00005	[E-COM92] Self Build Kit 1.000 Unit(s) MO/00007	[LAP-CUS] Laptop Customized 1.000 Unit(s) MO/00009
[PCSC234] Computer SC234 3.000 Unit(s) MO/00001	[LAP-CUS] Laptop Customized 5.000 Unit(s) MO/00011	

- In the first Case you will see all the work orders listed there with their status.

Manufacturing Orders / MO/00011 / Work Orders							
				Search...			
				Filters	Group By	Favorites	1-3 / 3
Work Order	Scheduled Date Start	Work Center	Manufacturing Order	Product	Original Production Quantity	Unit of Measure	Status
<input type="checkbox"/> Packing		Drill Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	In Progress
<input type="checkbox"/> Testing		Assembly Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	Pending
<input type="checkbox"/> Long time assembly		Assembly Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	Pending

- Select the Tasks from Work Order one by one and complete it.

Manufacturing Orders / MO/00009 / Work Orders / Packing

[Edit](#) Attachment(s) 1 / 3

Done Pause Block Scrap Pending Ready **In Progress** Finished

To Produce [LAP-CUS] Laptop Customized
Quantity Produced 0.000 / 1.000 Unit(s) **Ready to produce**

Work Instruction Current Production Time Tracking Miscellaneous

Page: 1 of 1 Automatic Zoom

No.	Cleaning Steps	Critical Points
1	Clean weld spatter and debris off: A. Bracket holders (4) B. Flange plate fixture surface C. Stopping blocks (4 sets) at breaks, lunch and end of shift or more frequently 2 Use file, wire brush , air hose, rag and or cleaner to remove more concentrated spatter or derbies. 3 Apply "Zip Dip" lightly to end of bracket holders 4 If spatter or debris can not be removed using these methods contact Team Leader or Set up Person.	Too Much "Zip Dip" can collect weld spatter and debris causing more unscheduled downtime Be cautious not to damage sensors while cleaning. Make sure "Points of Contact" always remain clean Safety Do not leave rags inside the weld cells. Careful of pinch points

Sensor
Bracket Holders
Stopping Blocks

Air Hose Brush Dip* File

- Use 'Pause', 'Block', 'Done' Buttons to control the progress of Task.
- **Done** means the Task is completed or the Task Status changes to **Finished** and you can automatically move to next Task in the Work Order.

Manufacturing Orders / MO/00009 / Work Orders							
				Search...			
				Filters	Group By	Favorites	1-3 / 3
Work Order	Scheduled Date Start	Work Center	Manufacturing Order	Product	Original Production Quantity	Unit of Measure	Status
<input type="checkbox"/> Packing		Drill Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	In Progress
<input type="checkbox"/> Testing		Assembly Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	Pending
<input type="checkbox"/> Long time assembly		Assembly Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	Pending

- Complete all the processes in the Work Order to complete Production

- Once you complete all the process in Work order then you can add the product into the inventory

Bill of Materials

BoM is the basic building block of any manufacturing process. It is the list of raw material needed to produce a product. So while creating a manufacturing order for a particular product we need to select corresponding BoM from the list. BoM will help us to create the inventory updated during manufacturing process. So before creating BoM we first need to add the Raw material to our product list in inventory.

- **Manufacturing > Master Data > Bill of Materials > Create**

- Select a product from list.
- Go to **Settings -> Manufacturing Order -> Product variant** option to enable select product variant option. (In case you produce a product Variant)
- **Reference** field is used to distinguish Different BoM for same product.
- Click **Add an Item** field and add the raw materials for your product.
- **“Routing”**, field is used to specify the WorkCentre routing of manufacturing process.
- Under the **Miscellaneous** tab in BoM, **Sequence** defines the order in which your BoMs will be selected for production orders, with lower numbers having higher priority.

*Note: - A BoM can be later Updated/Deleted from same menu i.e. **Manufacturing > Master Data > Bill of Materials**.*

Work center

As the name indicates, it is the Physical place in your firm where different manufacturing processes are done. You can create you work center details with all its performance indices. Later you can use this data to analyze the efficiency and other details of each work center.

Create Work Center

- **Manufacturing -> Master Data -> Work Centers ->Create**

The screenshot shows a web-based form titled "Work Centers / New". At the top left, there are "Save" and "Discard" buttons. The form is divided into several sections. On the right side, there is a status indicator "Active" with a green flag icon, and a dashboard of performance metrics: "0% OEE", "0 hour(s) Lost", "0 minute(s) Work Center ...", and "0% Performance". The main form area contains the following fields:

- Work Center Name:** A text input field.
- Code:** A text input field.
- Working Time:** A dropdown menu.
- General Information:** A tabbed section containing:
 - Efficiency Factor:** A text input field with the value "100.00" and a percentage sign.
 - Capacity:** A text input field with the value "1.00".
 - OEE Target:** A text input field with the value "90.00" and a percentage sign.
 - Time before prod.:** A time input field with the value "00:00" and the unit "minutes".
 - Time after prod.:** A time input field with the value "00:00" and the unit "minutes".
- Description:** A text area with the placeholder "Description of the work center..." and a small edit icon.

- Add all the necessary information including the process done here and the performance factors etc. in field
- Click <save> and mark <Active> to make it available for use.

Note: -"you can update/ Delete any work center information from same menu i.e. **Manufacturing > Master Data > Work Centers >**"

Routing

Each product have its own routes. Manufacturing process is not a single step process it may contain many **Work Centers** and each work centers have its own processes and process time. From this menu, we can set the order or route of each manufacturing. It's purely depends on the manufacturing company process. Some company has same type of manufacturing process. Then we create one routing. Some company has different manufacturing process for different products. Then we create each multiple routing.

- **Manufacturing > Master Data > Routings > Create**

The screenshot shows a software interface for creating a new routing. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'New' section. Inside this section, there is a 'Routing Name' input field. To the right of the input field are two buttons: 'Time Analysis' and 'Active'. Below the input field, there is a table with three columns: 'Operation', 'Work Center', and 'Duration'. The table has a header row and one data row. Below the table is a button labeled 'Add an item'. At the bottom of the form is a horizontal scrollbar.

- Give Rout a Name
- Click Add an Item to add the work centers included in this rout
- Click <save> and <Mark Active>

Note: - “You can Update/Delete a routing process from same menu i.e. **Manufacturing > Master Data > Routings**”

Work Order

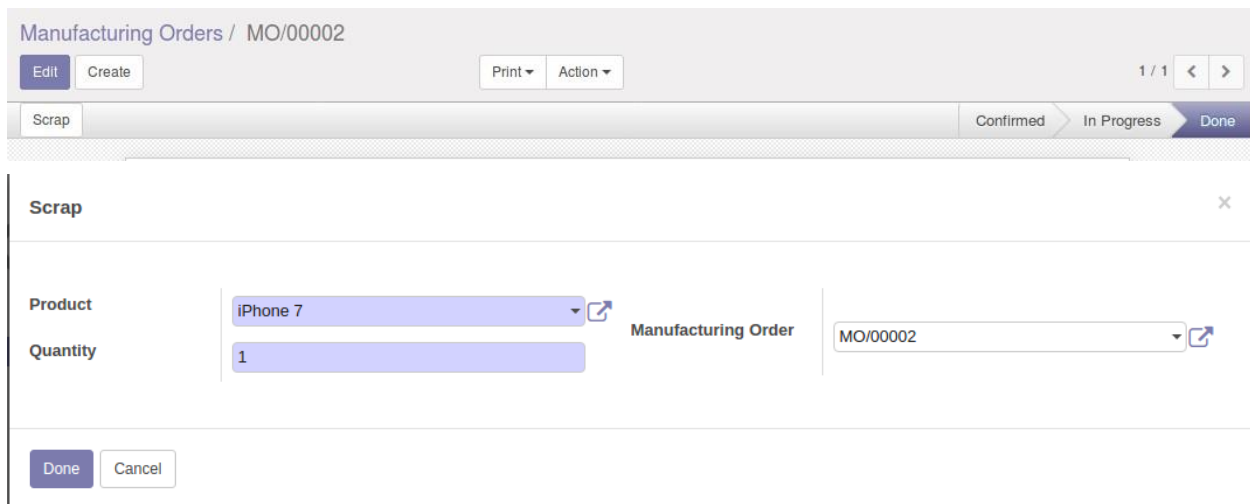
Once you have created and confirmed Manufacturing Order with a specific Rout. All the processes in the Rout are listed as work orders. So in order to complete a production, we must complete all the associated processes in work order. We can access Work Order related to a Manufacturing Order, either from Manufacture Order form or directly from **Manufacturing > Operations > Work Orders**

Scrap

One of the most useful features of Odoo is that you can create Scrap at any stage of production line. You can always see a Scrap button almost all the stages of the production line. Click this button to create instant scrap entry in inventory. You can create fresh scrap entry from

- **Manufacturing -> Operations -> Scrap -> Create**

Or you can make a quick entry by clicking on **Scrap** button available on almost all forms of production.



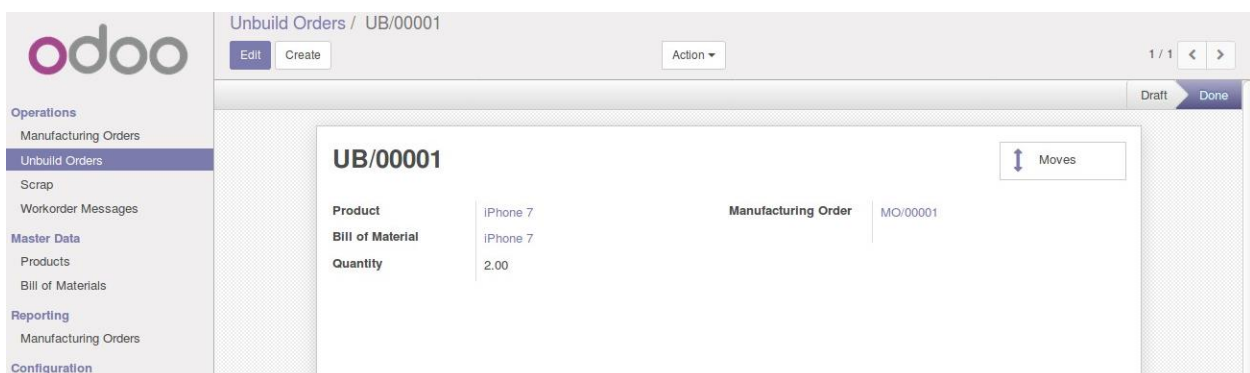
The screenshot shows the 'Scrap' form in Odoo. At the top, the breadcrumb is 'Manufacturing Orders / MO/00002'. Below this are buttons for 'Edit', 'Create', 'Print', and 'Action'. A progress bar shows 'Scrap' as the active step, followed by 'Confirmed' and 'In Progress', with a 'Done' button at the end. The main form area is titled 'Scrap' and contains fields for 'Product' (set to 'iPhone 7'), 'Quantity' (set to '1'), and 'Manufacturing Order' (set to 'MO/00002'). At the bottom are 'Done' and 'Cancel' buttons.

- Fill the fields and Click **“Done”**. It will automatically inserted into the inventory.

Unbuild Orders

Another useful feature in Manufacturing is Unbuild. We can unbuild the products into its bill of materials. This is actually a reverse process of production.

- **Manufacturing > Operations > Unbuild Orders > Create**

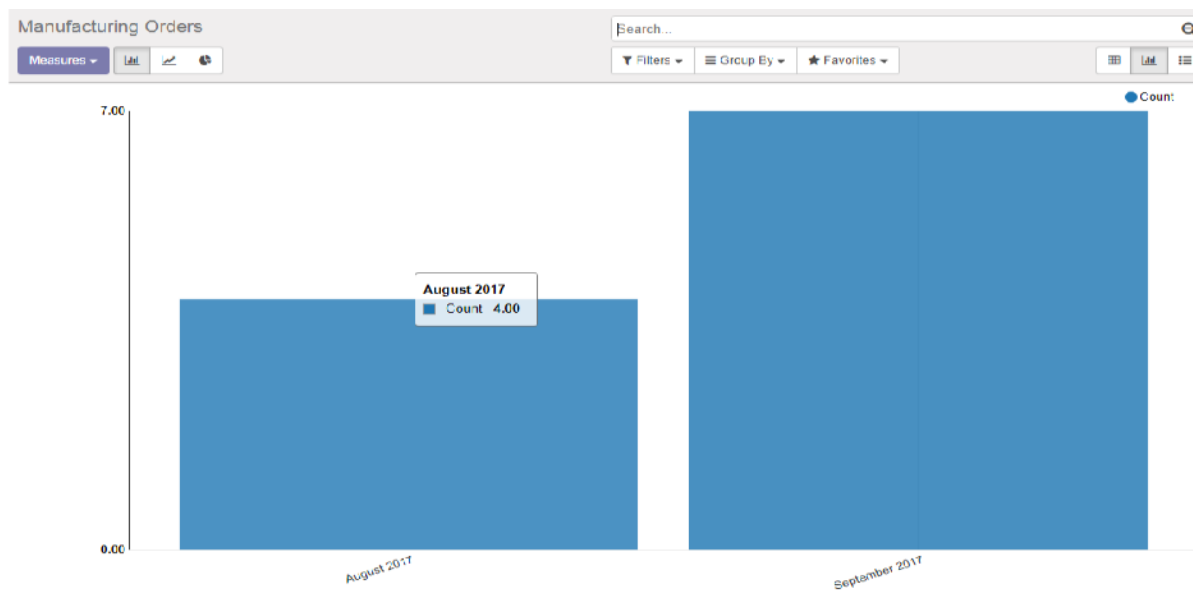


The screenshot shows the 'Unbuild Orders' form in Odoo. The breadcrumb is 'Unbuild Orders / UB/00001'. Below this are buttons for 'Edit', 'Create', and 'Action'. A progress bar shows 'Draft' as the active step, followed by 'Done'. The main form area is titled 'UB/00001' and contains fields for 'Product' (set to 'iPhone 7'), 'Bill of Material' (set to 'iPhone 7'), and 'Quantity' (set to '2.00'). There is also a 'Manufacturing Order' field set to 'MO/00001'. A 'Moves' button is visible on the right side of the form.

- Select the product which need to Unbuild,
- Select the bill of materials and quantity.
- If you need to specify a particular Manufacturing Order we can mention it here.
- Click <Done> and <Save>

Reporting

Odoo Reporting tools can produce concise yet very effective reports. You can view different types of report on Manufacturing Orders, Work orders, Work center Performance etc. under Reports tab



Configurations and Useful Settings

Byproducts configurations

A by-product is a secondary product derived from a manufacturing process. It is not the primary product or service being produced. To activate by product feature

- **Manufacturing > Settings**

By-Products

- ☒ No by-products in bills of materials (A + B --> C)
☐ Bills of materials may produce residual products (A + B --> C + D)

Tick the second option to enable By Products field in BoM. After ticking this we can see an additional tab in the BOM form after the miscellaneous.

Active

Product	iPhone 7	Reference BoM Type	Manufacture this product
Quantity	1.00		

Components
Miscellaneous
Byproducts

Product	Product Qty
iphone by-product	1.000

- Here we can add byproducts
- If we add the byproducts it will reflect on the MRP order.

Product	iPhone 7	Deadline Start	07/11/2017 14:47:14
Quantity To Produce	1.000 Update	Responsible	Administrator
Bill of Material	iPhone 7	Source	

Consumed Materials
Finished Products
Miscellaneous

Product	To Produce	Produced	
iPhone 7	1.000	0.000	
iphone by-product	1.000	0.000	

Human Resource

Odoo human resource management module is a comprehensive package to meet all your HR-related needs. It can manage the functions from Recruiting to, Employee Information Management, to Attendance and Leave management, Payroll, Expense, and Timesheet management. You have to install following apps from Odoo apps to enable HR management features.

Employee Directory

This application allows you to create and manage the employee directory of your organization. You can create your organization's department hierarchy and add employees under different department matching your organization's structure. Employee contract details are configured using this module. So this is the base of HR module.

Attendance

Employee attendance can be managed by installing this module. There are different attendance marking options available with Odoo. You can also add hardware for attendance marking. The module is integrated with Payroll, Leave Management, and Timesheet so that it provides a consistent attendance tracking mechanism.

Leave Management

Integrated with attendance, Payroll, and Timesheet, Leave Management allows the administrator to take efficient decisions on employee leave request.

Payroll

Odoo Payroll makes the complexity of payroll management simpler. You can create simple and complex salary structure based on salary rules. This salary structure can be applied to employee contract to generate monthly payment slip. From Odoo store you can also download custom payrolls for easy management.

Expense Management

Expense management module enables management of expenses occurred to employees. The employee can submit their expenses and appropriate officers can take actions on such requests.

Timesheet Management

It is another efficient module to manage timesheets of each employee. This is generally used for efficient management of projects or tasks.

Recruitment

You can automate and monitor all recruitment with this module. Recruitment stages, criteria, qualifications etc. can be configured with this module. You can install Online Jobs app to channelize recruitment via your website.

There are some more other useful apps and plugins that you can find in Odoo App store.

Some of the features [14] of the Odoo HRM module is

- **Manage**

- Create employee profiles***

- Gather all information concerning each employee at one place.

- Manage contracts***

- Keep track of your employees' status, job titles, contract type and dates, and their schedule.

- Manage timesheets***

- Create weekly and monthly timesheets and follow the time spent by your employees on projects.

- Handle attendance***

- Keep the track of your employees' presence at work. HR managers can easily report employees' monthly presence with the menu entry and state.

- Manage leaves***

- Manage holidays, legal leaves and sick days.

- Dashboards***

- Get a dashboard per manager.

- **Collaborate**

- Enterprise social network***

- Follow employees and documents, join discussion groups, share files, and chat in real time.

- Gamification***

- Design challenges, goals and rewards with clear targets and objectives to drive engagement and reward your employees' performance. [14]

System Users:-

Basically there are three types of users in HR management process

Employee: - Normal employee of office. He can mark his attendance, access the tasks assigned to him, manage his timesheet and perform other tasks associated with him.

Officer:- A higher level employee who has better powers and access rights like sanction leave, sanction time sheet etc.

Manager: - Manager who control and configure every procedure in HR module. Complete control over all level.



Department Management

Create and manage your organizations departmental hierarchy easily with Odoo HR module.

Create department

- **Employee > department > Create**

The screenshot shows the 'Departments / New' form in Odoo. At the top, there are 'Save' and 'Discard' buttons. The form contains the following fields:

- Department Name:** A text input field.
- Parent Department:** A dropdown menu.
- Manager:** A dropdown menu.
- Active:** A checkbox with a green 'Active' label.

Fill all necessary fields and click **<save>**

Note: - "to create a sub department choose the parent department from

dropdown” **Note:** - “mark it as **Active**, then only the created department will be available to use”

Delete/Update department

Employee > department

- Click on **<more>** option from your respective department

The screenshot shows the 'Management' header with 'YourCompany' and a 'More' dropdown arrow. Below the header, there is a button labeled 'Employees' and two links: 'Leave Requests' with a count of 14, and 'Allocation Reque...' with a count of 1. At the bottom, there is an 'Absence' section with a search bar and a count of 0 / 1.

- Choose **<Settings>** from the option and make the changes you need

View Employees in the department

- Employees > Department**

The screenshot shows the 'Management' header with 'YourCompany' and a 'More' dropdown arrow. Below the header, there is a button labeled 'Employees' and two links: 'Leave Requests' with a count of 14, and 'Allocation Reque...' with a count of 1. At the bottom, there is an 'Absence' section with a search bar and a count of 0 / 1.

Click on **<Employees>** button on respective department to view employees of that department

Department wise Report

- **Employee -> department**
- Click on **<more>** option from your respective department

The screenshot shows a dashboard for 'YourCompany' under the 'Administration' section. It features a 'More' dropdown menu and three main categories: 'To Do', 'To Approve', and 'Reports'. The 'To Do' section shows '0 New Applic...'. The 'To Approve' section lists '0 Timesheets', '1 Leave Req...', '0 Allocation ...', and '0 Expense R...'. The 'Reports' section lists 'Timesheets', 'Leaves', 'Recruitments', 'Attendances', and 'Expense Re...'. At the bottom, there is a row of colored squares and a 'Settings' link.

You can click on any of the reports to view in detail

Employee profile management

Create an Employee Profile

- **Employees > Create**

The screenshot shows the 'Employees / New' form. It includes a 'Save' button and a 'Discard' button. The form is divided into three tabs: 'Public Information', 'Personal Information', and 'HR Settings'. The 'Public Information' tab is active, showing fields for 'Name' (with a placeholder 'Employee's Name'), 'e.g. Part Time' (a dropdown), 'Active' (a checkbox), '0 Contracts' (a counter), '0 Timesheets' (a counter), and '0 Payslips' (a counter). Below these are sections for 'Contact Information' and 'Position'. The 'Contact Information' section includes fields for 'Working Address' (a dropdown with 'YourCompany'), 'Work Mobile', 'Work Location', 'Work Email', and 'Work Phone'. The 'Position' section includes fields for 'Department', 'Job Title', 'Manager', 'Coach', and 'Working Time'. At the bottom, there is a field for 'Other Information ...'.

You can Jump through “Public information”, “personal information”, HR settings” tabs to find all the necessary information for an employee.

- Click <Save>

Update/Delete an employee

- **Employees > Dashboard**
- Select any of the employee from the list.

The screenshot displays the OpenERP 'Employees' interface for a specific employee, Antoine Langlais. At the top, there's a header bar with 'Employees / Antoine Langlais', 'Edit' and 'Create' buttons, and a dropdown menu for 'Print', 'Attachment(s)', and 'Action'. A pagination bar shows '1 / 24' with navigation arrows. The main content area features a profile card for Antoine Langlais, including a photo, a status indicator 'Active', and statistics for 'Leaves Left' (0), 'Contracts' (0), 'Timesheets' (0), and 'Payslips' (0). Below the profile card are three tabs: 'Public Information', 'Personal Information', and 'HR Settings'. The 'Public Information' tab is active, showing 'Contact Information' and 'Position' details. The 'Contact Information' section lists 'Working Address', 'Work Mobile', 'Work Location' (Building 1, Second Floor), 'Work Email' (antoine@openerp.com), and 'Work Phone' (+3281813700). The 'Position' section lists 'Department' (Research & Development), 'Job Title' (Chief Technical Officer), 'Manager' (Coach), and 'Working Time'.

- You can view employee info on the window, make necessary changes if needed and save
- To delete an employee click on ‘Action’ > **Delete**

Note: - “In HR Tab there is field “Related User”, using this option you can assign an employee to any ‘system user’. For example, project manager can be any employee of the firm as well as he can be the “Administrator” of the system”

Contract management

Add new contract

- **Employees > Contract > Create**

Contracts / New

Save Discard

New Running To Renew Expired

Contract Reference

Contract Reference

Employee Department Job Title Contract Type Employee

Information Work Permit

Salary and Advantages

Wage 0.00 Salary Structure Advantages...

Duration

Trial Period Duration Duration 09/13/2017 Working Schedule Scheduled Pay Monthly

You can select 'Employee' 'Department' and other basic information from the window and assign the contract directly to an employee.

Working Schedule:-

We can set working schedule of the Employee from here itself. Click working Schedule **Drop Down** menu to add working schedule of the employee.

Create: Working Schedule

Name Workgroup Manager Administrator

Working Time

Name	Day of Week	Work from	Work to	Starting Date	End Date
n1	Monday	00:00	00:00		

Add an item

Leaves

Reason	Resource	Working Time	Start Date	End Date
--------	----------	--------------	------------	----------

Add an item

Save Discard

- Click Add an Item to Fill duty timing and Leaves
- Click <Save>

Update/Delete a contract

Admin can Update a contract information, contract Status or delete a contract altogether by following method

Employees > Contract

Select the contract you wish to change

The screenshot shows the Odoo Contracts interface for a 'Marketing Executive Contract'. At the top, there's a breadcrumb 'Contracts / Marketing Executive Contract' and buttons for 'Edit' and 'Create'. Below these are 'Attachment(s)' and 'Action' dropdowns, and a pagination '1 / 2' with navigation arrows. A ribbon at the top indicates the contract status: 'New' (highlighted), 'Running', 'To Renew', and 'Expired'. The main form area is titled 'Marketing Executive Contract' and contains several sections: 'Employee' (Roger Scott) and 'Job Title' (Marketing Executive), 'Department' (Marketing) and 'Contract Type' (Employee), 'Information' and 'Work Permit' tabs, 'Salary and Advantages' (Wage: 4,000.00, Salary Structure: Marketing Executive), 'Duration' (Trial Period Duration: -, Duration: 08/01/2017 - 12/31/2017, Working Schedule: 40 Hours/Week, Scheduled Pay: Monthly), and 'Notes' (Default contract for marketing executives).

- Make edits wherever needed and click <Save>

Note: “change the status of the contract by just clicking on ribbon that indicate the status”



Leave Management

Leave management in Odoo is done through two phase at first phase employee request for leave and the HR manager or concerned level officer must sanction the leave. Odoo generates detailed report to analyses the leave behavior. Admin or concerned officer can view these reports before sanctioning leave to an employee.

Making Leave Request

- **Leaves > My Leaves > Leave Summary > Create**

Leaves Summary / New

Save Discard

To Submit To Approve Approved

Description

Leave Type

Duration

0.00 days

- Fill the fields and **<save>**

(Now the status of your leave is **“To Approve”**, it will be changed once concerned officer approve this leave).

Approve leave

Once a user make a leave request, the concerned officer like HR admin must approve the same to sanction leave.

- Login as Administrator
- **Leaves > Leaves to Approve**
- All leave requests will be listed here
- Select a leave request and Approve or Reject

Leaves Request / John Doe on Sick Leaves : 4.00 day(s)

Edit Create Action

1 / 1 < >

Reset to Draft To Submit To Approve Approved

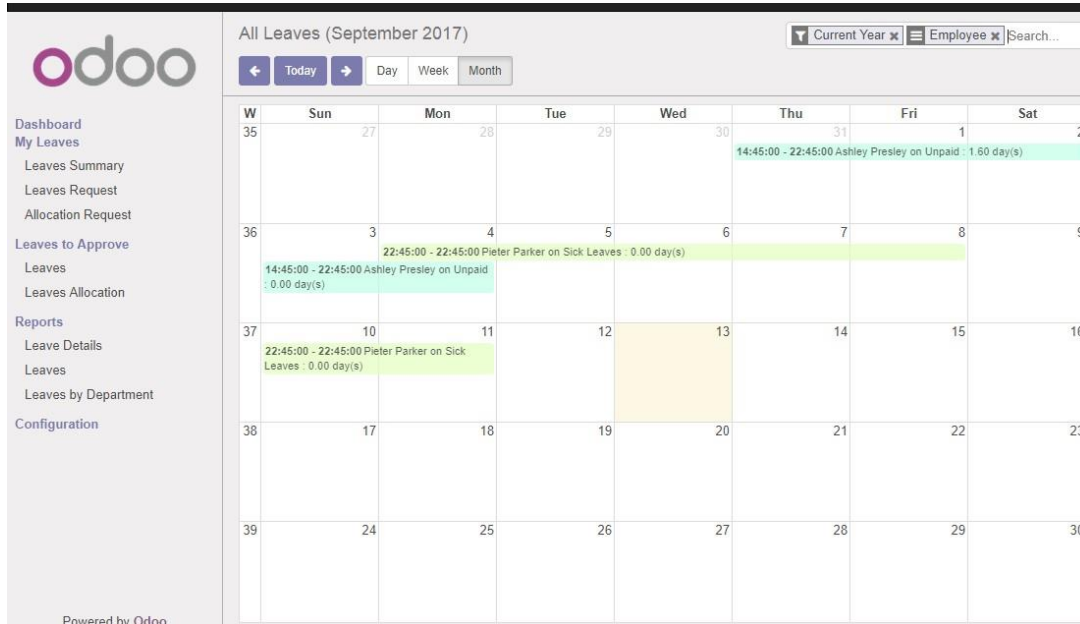
John Doe on Sick Leaves : 4.00 day(s)

Description	Test Leave
Leave Type	Sick Leaves
Duration	06/05/2017 07:00:00- 06/08/2017 19:00:00 4.00 days

Leave Report

Administrator can View detailed and varying reports in his dashboard.

- **Leaves> Reports**



Leave Allocation

Unlike leave request, leave allocation is more planned leave request employee can request to allocate leave for him (generally in case of long leaves). Leave allocation option in Odoo leave management gives an easy interface to accomplish this task.

- **Leaves > My leaves > Allocation Request > Create**

Fill the fields and click <Save> to submit the leave to manager for approval

Attendance Management

Odoo HR management includes attendance module which manages employee's attendance. Attendances are recorded according to the Check in/ Check Out actions. After installing attendance module from Odoo apps, we can see a new menu named Attendances.

Attendance Entry

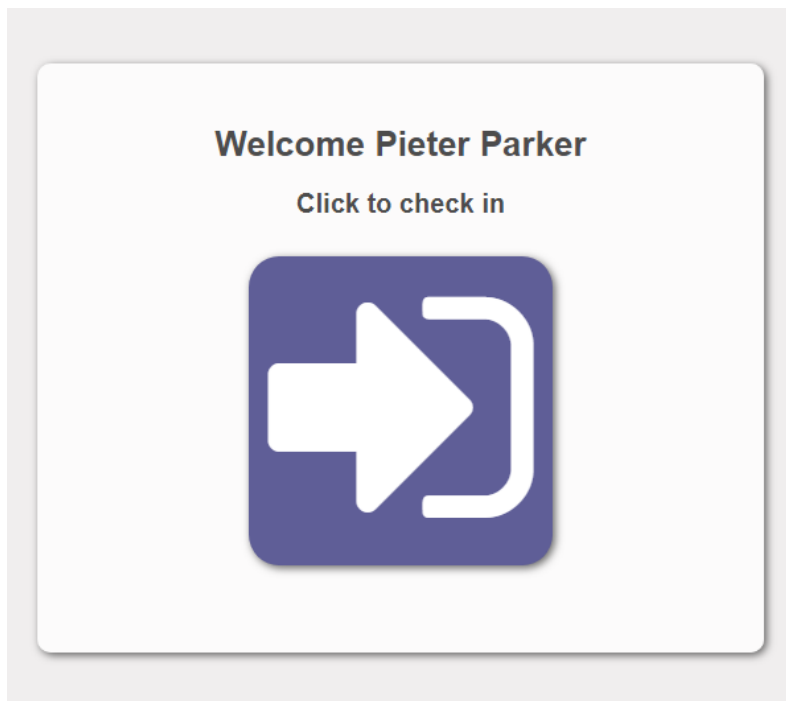
Basically there are three ways to mark attendance

- Direct login and mark attendance
- Admin Make manual check in and check out entry
- Kiosk Mode
-

Direct login and mark attendance

Since system login credentials are generally available to officer level employees this attendance marking facility is available only for those employees who have a system login Username and Password. They can login to the system and mark their attendance from **Attendance** menu.

Login > Attendance



Click the image **to check in and click again to check out.**

Admin make manual entry

Since direct login is not allowed for all users, Odoo provides another option to mark attendance. Administrator or any dedicated person can mark attendance for each employee.

- **Attendances -> Manage Attendances ->Attendances -> Create**

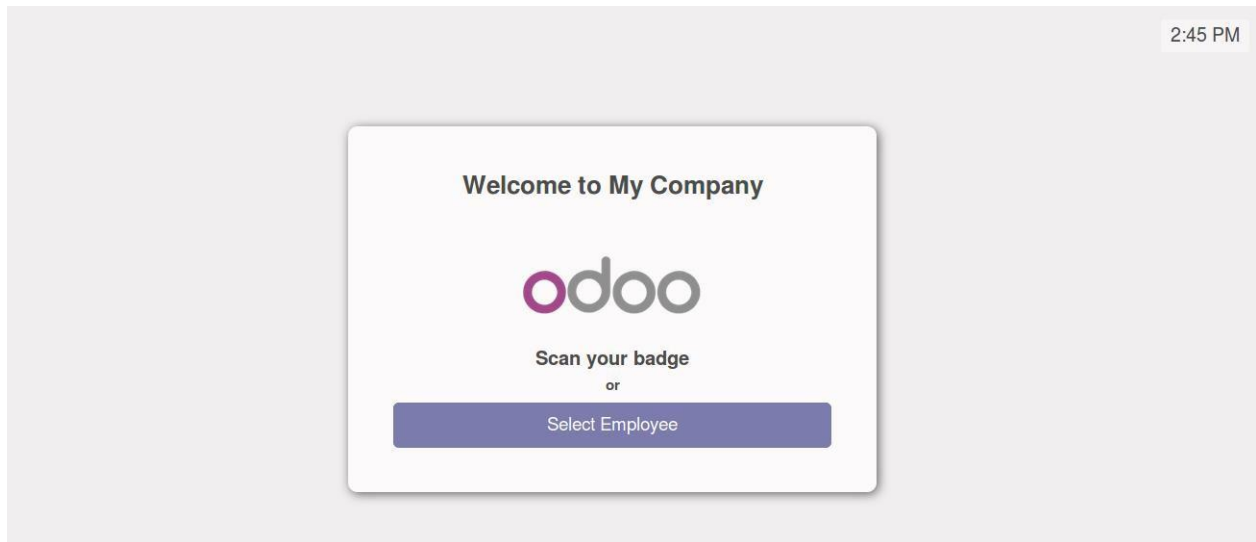
- Mark the fields and **<Save>**

Kiosk Mode

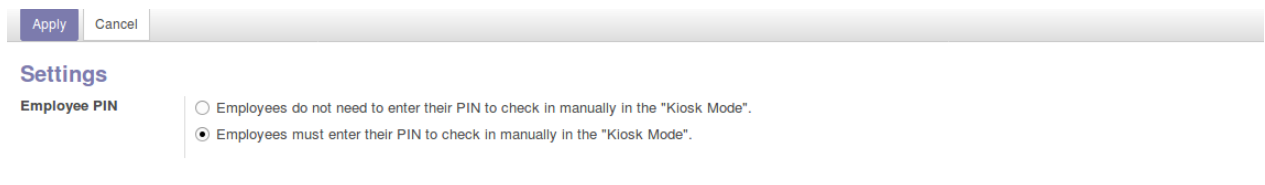
New Interface provided by Odoo version 10, which feeds attendances of employee using their badges or pin. The badges can print from employee form.

Using these badges employees can Check In/out.

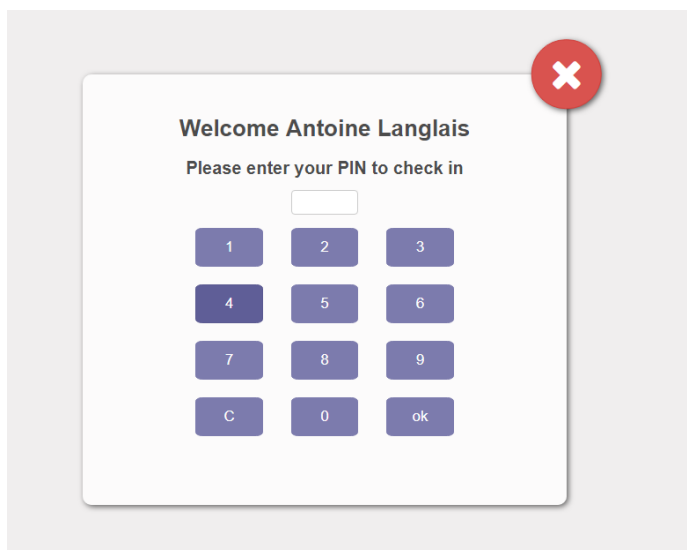
- **Attendances -> Manage Attendances -> Kiosk Mode**



Another option is Check in/out using pin. For this we have to enable Configurations under **Attendance** menu.






Use “**Select Employee**” button on kiosk mode to check in/out using pin. It gives the interface to enter pin.



Reports

Admin can view detailed attendance report on

Attendances > Report

 My Attendances Manage Attendances Attendances Employees Kiosk Mode Reports Configuration	Attendance Analysis		
	Measures ▾		
		— Total	
		+ August 2017	+ September 2017
		Worked Hours	Worked Hours
	— Total	58.40	19.32
	+ Ashley Presley		0.00
	+ Gilles Gravie	49.40	49.40
	+ Hans Anders		0.00
	+ Pieter Parker	9.00	19.32

PayRoll

To enable the payroll functionalities we have to install a new plugin in HR, called Payroll. To integrate payroll with accounting, you have to install another plugin that is Payroll Accounting from Odoo apps. To generate a pay slip, the **employee should have an active contract and a salary structure. Salary structures are created using different salary rules of different categories.**

Salary Rule

Salary rules are the basic blocs for calculating an employee's salary. It specifies how to calculate DA, HRA, Gross etc. components of a person's salary.

Create salary rule

- Pay Roll -> Salary Rule -> Create

Salary Rules / New

Save

Discard

Name

Category

Code

Sequence

5

Active

☒

Appears on Payslip

☒

General

Child Rules

Inputs

Description

Conditions

Condition Based on

Always True

Computation

Amount Type

Fixed Amount

Quantity

1.0

Fixed Amount

0.00

Field Description

Condition: - set a condition to apply the Rule

Always True means the rule is always applied

Range means you can choose a salary range to apply the rule

By choosing **Python expression** you can configure more customization

Computation: - Choose the computational scheme from the options

Contribution Register: - Use, if third party involved in salary payment

“Add more rules (if needed) from Child Rule tab and jump to Inputs and Description tabs to add other necessary details about Salary Rule”

- Click Save to save the salary rule

Update/Delete a salary rule

- **Pay Roll > Salary Rule**

Salary Rules			
Create Import		<input type="text" value="Search..."/>	
<input type="checkbox"/> Name	Code	Category	Contribution Register
<input type="checkbox"/> Basic	BASIC	Basic	
<input type="checkbox"/> Gross	GROSS	Gross	
<input type="checkbox"/> Net	NET	Net	Employees
<input type="checkbox"/> House Rent Allowance	HRA	Allowance	House Rent Allowance Register
<input type="checkbox"/> Conveyance Allowance	CA	Allowance	
<input type="checkbox"/> Professional Tax	PT	Deduction	Professional Tax Register
<input type="checkbox"/> Provident Fund	PF	Deduction	Provident Fund Register
<input type="checkbox"/> Conveyance Allowance For Gravie	CAGG	Allowance	
<input type="checkbox"/> Meal Voucher	MA	Allowance	Meal Voucher Register
<input type="checkbox"/> Get 1% of sales	SALE	Allowance	

- Select the Pay Rule you wish to change from the list and Click **<Edit>** button

Salary Rules / House Rent Allowance

[Edit](#) [Create](#) Attachment(s) Action 4 / 10 < >

House Rent Allowance

Allowance

Code	HRA	Sequence	5
Active	<input checked="" type="checkbox"/>	Appears on Payslip	<input checked="" type="checkbox"/>

General

Child Rules

Inputs

Description

Conditions

Condition Based on

Always True

Computation

Amount Type	Percentage (%)
Percentage based on	contract.wage
Quantity	1.0
Percentage (%)	40.0000

Company Contribution

Contribution Register	House Rent Allowance Register
-----------------------	-------------------------------

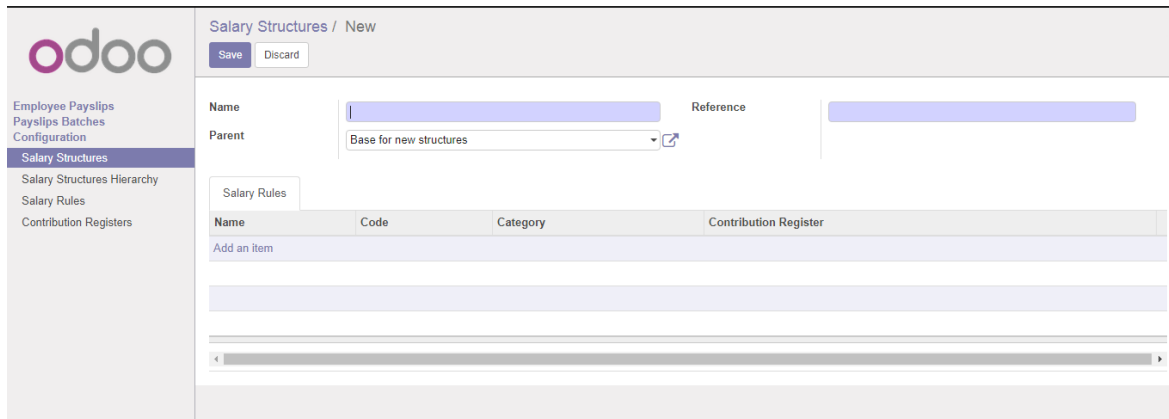
- Make necessary changes in the fields and **<save>**
- Or you can delete the rule from **Action > Delete**

Salary Structure

Salary structure is the second building block in salary computation. A company may have different salary structure for different employees. In this section we can define different salary structure with the help of basic rules we already defined.

Create Salary Structure

- Payroll -> Configuration -> Salary Structure -> Create



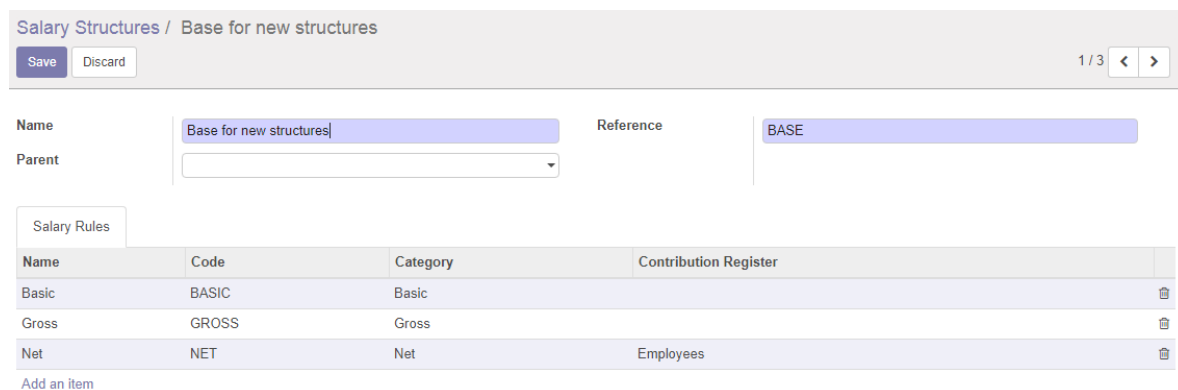
The screenshot shows the 'Salary Structures / New' form in Odoo. The left sidebar contains a menu with 'Salary Structures' highlighted. The main form has fields for 'Name' (a text input), 'Reference' (a text input), and 'Parent' (a dropdown menu with 'Base for new structures' selected). Below these fields is a 'Salary Rules' section with a table. The table has columns: 'Name', 'Code', 'Category', and 'Contribution Register'. There is an 'Add an item' button below the table. The table is currently empty.

You can add any applicable salary rule to this structure to make new salary rule.

- Once finished click <Save>

Update/Delete Salary Structure

- Payroll -> Configuration -> Salary Structure
- Select the salary Structure you wish to edit
- Click <Edit>



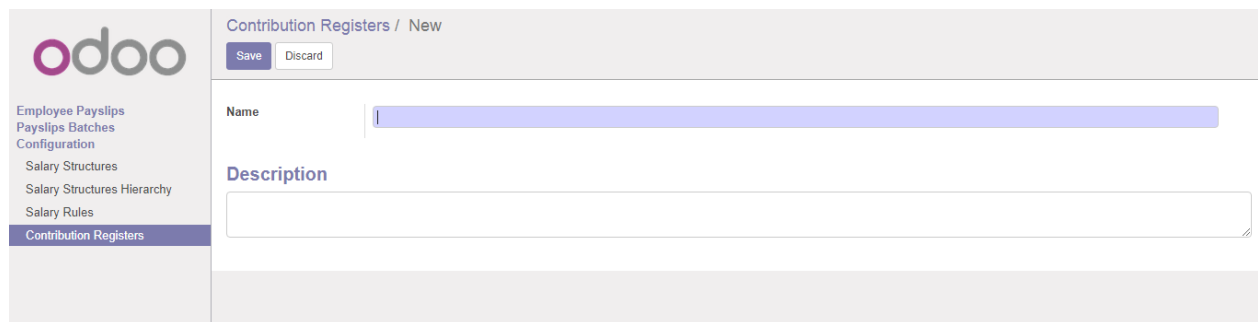
The screenshot shows the 'Salary Structures / Base for new structures' form in Odoo. The left sidebar contains a menu with 'Salary Structures' highlighted. The main form has fields for 'Name' (a text input with 'Base for new structures' entered), 'Reference' (a text input with 'BASE' entered), and 'Parent' (a dropdown menu). Below these fields is a 'Salary Rules' section with a table. The table has columns: 'Name', 'Code', 'Category', and 'Contribution Register'. There are three rows of data: 'Basic' with code 'BASIC' and category 'Basic'; 'Gross' with code 'GROSS' and category 'Gross'; and 'Net' with code 'NET' and category 'Net'. Each row has a trash icon in the 'Contribution Register' column. There is an 'Add an item' button below the table.

- Make the changes and <save>
- Or you can delete the structure altogether

Contribution Registers

Contribution registers are used to manage the salary component contributed by external entities. You must create all contribution registers first, then it can be accessed while you create Salary Rule.

- **Payroll > Contribution Register > Create**



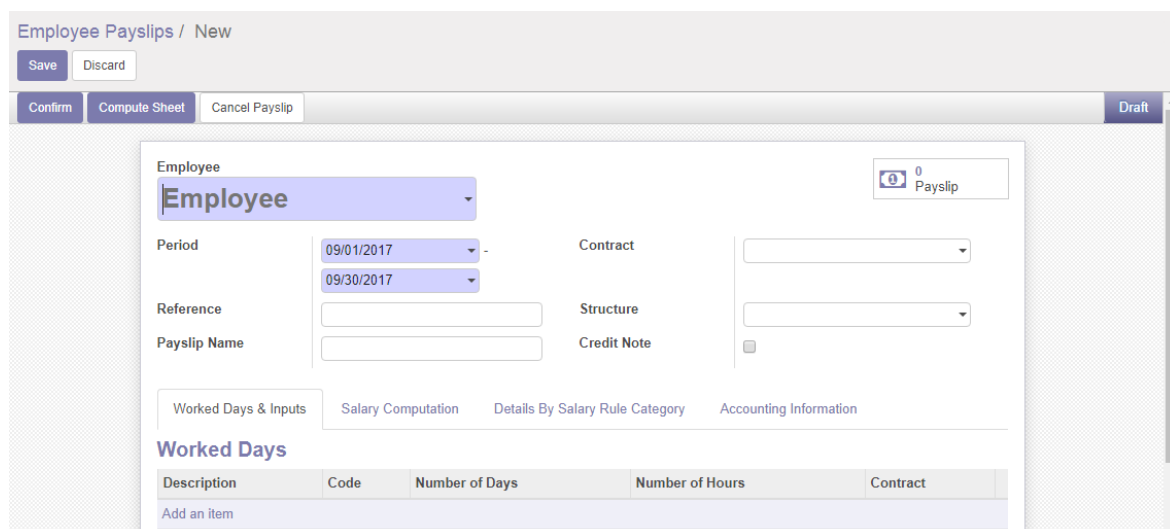
Note: - “you can Update or Delete Contribution Register from the same menu itself”

Payslip

Pay slip is the ultimate output of Payroll. A pay slip undergoes different Status in Odoo Payroll management. **‘Draft’**, **‘Waiting’**, **‘Done’**, **‘Rejected’**. These options are for the sake of proper management within the organization. A pay slip can be created by an entry level employee, but its approval must be come from a managerial employee.

Create Pay slip

- **Payroll > Employee Pay slip > Create**



Once you have filled the necessary information then click **Compute Sheet** to calculate salary and **<Save>**

Note: - Once it is **Confirmed**, the Payslip will be in **Waiting** stage an officer level user must mark it as **Done** to get actual Approval for the Payslip. Same Rule stages are applicable to Batch Payslip also.

Update or Delete Payslip

Payroll > Employee Payslip

- Select any Payslip you wish to Update/Delete > **Edit**

Employee Payslips / Salary Slip of Gilles Gravie for September-2017

Save Discard 1 / 5 < >

Refund Draft Done

Employee
Gilles Gravie

Period 09/01/2017 - 09/30/2017 Contract Contract For Gilles Gravie
Reference SLIP/002 Structure Marketing Executive for Gilles Gravie
Payslip Name Salary Slip of Gilles Gravie for September-2017 Credit Note ☐

Worked Days & Inputs Salary Computation Details By Salary Rule Category Accounting Information

Worked Days

Description	Code	Number of Days	Number of Hours	Contract
Normal Working Days paid at 100%	WORK100	21.00	168.00	Contract For Gilles Gravie

21.00

Other Inputs

- Make changes and Save
- Or **Discard** to delete the Payslip

Batch Payslip

Batch Payslip is used to process Payslip for group of employees. You can add number of employee to a single batch and generate Payslip simultaneously instead of individual processing.

Create Batch Payslip

- Payroll -> Payslip Batches -> create

Payslips Batches / New

Save Discard

Close Generate Payslips Draft Close

Name

Period 09/01/2017 - 09/30/2017 Credit Note ☐

Payslips

Reference	Employee	Payslip Name	Date From	Date To	Status
Add an item					

- Click **Add an Item** to add employees to list

Create: Payslips

Confirm Compute Sheet Cancel Payslip Draft

Employee Employee

Period 09/01/2017 - 09/30/2017 Contract

Reference Structure

Payslip Name Credit Note ☐

Worked Days & Inputs Salary Computation Details By Salary Rule Category Accounting Information

Worked Days

Description	Code	Number of Days	Number of Hours	Contract
Add an item				

Save & Close Save & New Discard

- Add all the employees you need to the list and **<Save>**.

Update/Delete Batch Payslip

- Payroll -> Payslip Batches
- Select the Batch Slip from the list and click <Edit>

Payslips Batches / new

Edit Create Attachment(s) Action 1 / 1 < >

Close Generate Payslips Draft Close

new

Period 09/01/2017 - 09/30/2017 Credit Note

Payslips

Reference	Employee	Payslip Name	Date From	Date To	Status
	Gilles Gravie	Salary Slip of Gilles Gravie for September-2017	09/01/2017	09/30/2017	Draft
	Jack Macklin	Salary Slip of Jack Macklin for September-2017	09/01/2017	09/30/2017	Draft

- Make changes and save
- Or you can discard

Expenses

Expenses bared to an employee can be managed with simple steps in Odoo Expense manager. Here an employee can generate, submit and track status of his expenses. There are two ways to generate expense. Either by single expense or **“Report Expense”** mode. As the name indicates former can include only single expense at a time, later can add many items and expenses in a single report.

Once the employee submits the expense details, concerned manager or officer can view it and take actions. An expense bill undergoes different states like **“Submitted”, “Approved”, “Posted”, and “Paid”**. These options are for sake of proper management of the expense bill within the organization just like in the case of Payslip. For example expense approval may be given by operation department and payment is done by the finance department.

Generate an Expense

Single expense creation

- **Expenses > My Expenses > Expenses to Submit > Create**

My Expenses to Submit / New

Save Discard

Submit to Manager To Submit Reported Posted

Expense Description
e.g. Lunch with Customer

0 Documents

Product

Unit Price \$ 0.00

Quantity 1.000

Bill Reference

Date 09/13/2017

Account 220000 Expenses

Employee Gilles Gravie

Total \$0.00

Payment By ☒ Employee (to reimburse) ☐ Company

Notes...

- Fill the fields and click <Submit to Manager>

My Expenses to Submit / [CarTRA] Car Travel Expenses / New

Save Discard

Submitted Approved Posted Paid

Expense Report Summary
[CarTRA] Car Travel Expenses

0 Documents

Employee Gilles Gravie

Payment By Employee (to reimburse)

Expense Journal Vendor Bills (USD)

Date	Expense Description		Taxes	Total
09/13/2017	[CarTRA] Car Travel Expenses	0		\$ 0.32
Add an item				
				0.32

"You can add more number of items to a same expense bill"

“Once the expense is **submitted** you can see the status of the expense changes”

- Finally save the Expense bill.

Note:-“Now it has to be **approved** by an officer level user. Posted means the Payslip is posted in Journal and finally **Paid** status indicate the actual Payment. All these state changes can be done by different users. Same Rule is Applicable to Expense Report also.”

My Reports / New

Save Discard

Approve Refuse Submitted Approved Posted Paid

Expense Report Summary

e.g. Trip to NY

Employee: Pieter Parker

Payment By:

Date	Expense Description	Taxes	Total
Add an item			

Expense Report Creation (Multiple expense entry in a single bill)

- Expenses > Expense Reports > Create
- Click <Add Item> to add single expenses to you bill.

Add: Expense Lines

Search...

1-3 / 3

<input type="checkbox"/>	Date	Expense Description	Employee	Total	Status
<input type="checkbox"/>	09/13/2017	[CarTRA] Car Travel Expenses	Pieter Parker	\$ 0.32	To Submit
<input type="checkbox"/>	09/13/2017	[CarTRA] Car Travel Expenses	Gilles Gravie	\$ 0.32	To Submit
<input type="checkbox"/>	08/25/2017	Travel by Air	Pieter Parker	\$ 700.00	To Submit
				700.64	

Select Create Cancel

- You can either choose an already created expense to your list or you can create new expense by clicking <Create> button
- <Save> the report and <Submit To Manager> for approval

Approve / Pay / Reject Expense

Expense approval is the duty of concerned department Head/Officer.

Expenses > To Approve > Expense Report To Approve

- From the list select a submitted expense, scrutinize it and take appropriate action.

Expense Reports to Approve / Hotel Expenses

Buttons: Edit, Create, Print, Attachment(s), Action

1 / 1 < >

Approve Refuse Submitted Approved Posted Paid

Hotel Expenses

0 Documents

Employee: Pieter Parker
Payment By: Employee (to reimburse)
Expense Journal: Vendor Bills (USD)

Date	Expense Description	Taxes	Total
08/25/2017	Hotel Expenses	0	\$ 2,000.00
			2,000.00

New message Log an internal note

Following 1

Timesheet management

Time sheets are closely associated with project management. In HR module Odoo gives the feature to prepare **Timesheet** for each employee. The important feature of Odoo timesheet is that, it can integrate with attendance of employee, thus gives an accurate working schedule.

Create Timesheet

- Timesheet -> My timesheet -> Create

My Timesheets / New

Buttons: Save, Discard

New Waiting Approval Approved

Employee: Pieter Parker

Timesheet Period: 09/11/2017 to 09/17/2017

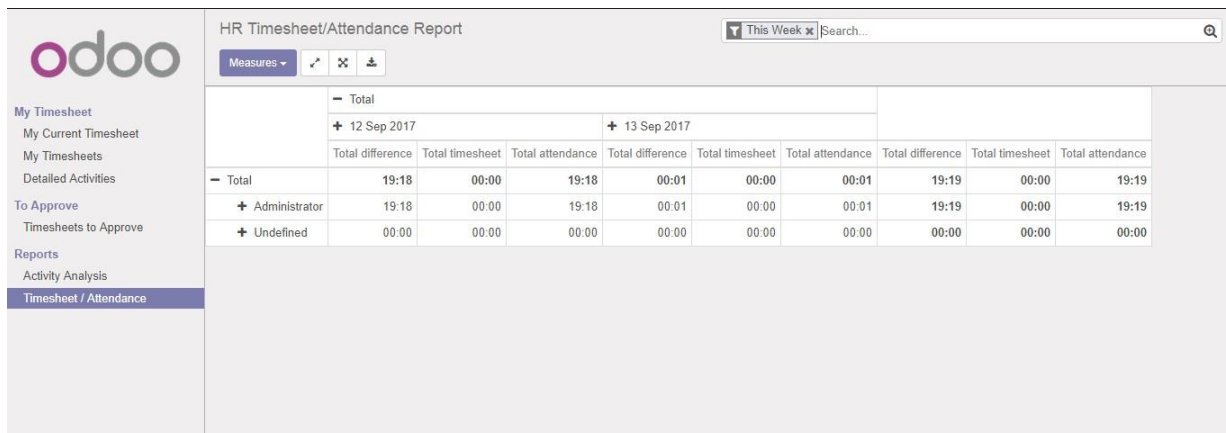
Summary Details Attendances

	Mon Sep 11	Tue Sep 12	Wed Sep 13	Thu Sep 14	Fri Sep 15	Sat Sep 16	Sun Sep 17	Total
	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

Add a Line

Click to add projects, contracts or analytic accounts.
You will be able to register your working hours and activities.

- **Timesheet > Reports**

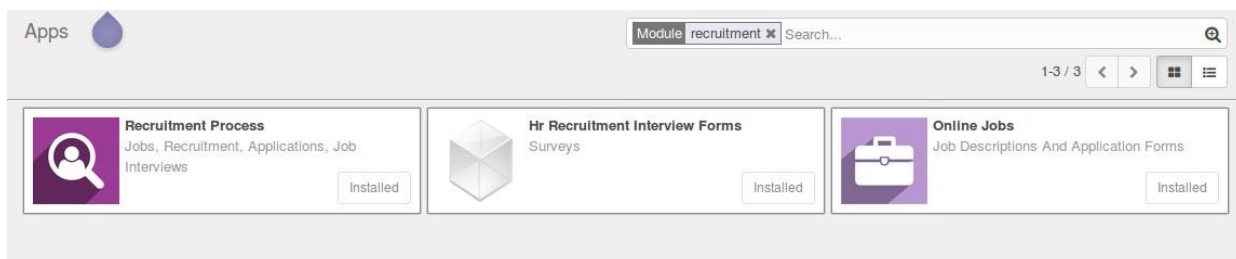


The screenshot shows the Odoo HR Timesheet/Attendance Report interface. The left sidebar contains navigation links: My Timesheet, My Current Timesheet, My Timesheets, Detailed Activities, To Approve, Timesheets to Approve, Reports, Activity Analysis, and Timesheet / Attendance (highlighted). The main area displays a table with columns for dates and various time metrics.

HR Timesheet/Attendance Report									
This Week x Search...									
Measures									
Total									
+ 12 Sep 2017					+ 13 Sep 2017				
	Total difference	Total timesheet	Total attendance	Total difference	Total timesheet	Total attendance	Total difference	Total timesheet	Total attendance
- Total	19:18	00:00	19:18	00:01	00:00	00:01	19:19	00:00	19:19
+ Administrator	19:18	00:00	19:18	00:01	00:00	00:01	19:19	00:00	19:19
+ Undefined	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

Recruitment Management

The Recruitment process is one of the major challenges for HR Department and Odoo provides Recruitment modules to make ease the process. From Odoo apps we can install plugins related with HR Recruitment. Here we can see three add-ons related with Recruitment process.



Here, online jobs plugin installs website module and will create a new page on your website named Jobs. HR Recruitment Interview forms will installs survey module for interview forms.

Create job Openings

To create a job opening you must login as Admin or designated officer

Recruitment -> Configuration -> Job Position -> Create

Or

Recruitment -> Job Position -> Create

Job Positions / New

Save Discard

Stop Recruitment Recruitment in Progress Not Recruiting

Job Title
e.g. Sales Manager

0 Applications 0 Employees 0 Documents

Trackers Unpublished On Website

Department Interview Form

Recruitment Responsible Job Location

Specific Email Address

Expected New Employees

Job Description

- Fill the Job details and publish to Website

Now you can see the Job is listed on your Website under **Jobs** Tab

WEBSITE Content Customize Promote

Website localhost Home Shop Jobs shop2 main Contact us new Administrator

Our Job Offers

Join us and help disrupt the enterprise market!

Join us, we offer you an extraordinary chance to learn, to develop and to be part of an exciting experience and team.

Experienced Developer 4 open positions
 1725 Slough Ave., Scranton PA 18540, United States
 09/14/2017 08:06:57

Marketing and Community Manager 3 open positions
 1725 Slough Ave., Scranton PA 18540, United States
 09/14/2017 08:06:57

Consultant
 1725 Slough Ave., Scranton PA 18540, United States
 09/14/2017 08:06:57

Trainee 6 open positions
 1725 Slough Ave., Scranton PA 18540, United States
 unpublished
 09/14/2017 08:06:57

Define Recruitment procedure

Each company have its own recruitment process. You can define your own recruitment stages for recruitment.

Recruitment > Configuration > Stages > Create

The screenshot shows the 'Stages / New' form. At the top, there are 'Save' and 'Discard' buttons. Below this is the 'Stage Definition' section, which includes a 'Stage name' text input field, a 'Job Specific' dropdown menu, a 'Folded in Recruitment Pipe' checkbox, and a 'Use template' dropdown menu. The 'Requirements' section is a large text area for adding requirements.

*“Use **Job Specific** Dropdown option to restrict the stage to specific job positions”*

Create Recruitment Form

To choose whichever Survey/questionnaire form to be filled by candidate while applying for job, Activate same option from **Settings** menu.

The screenshot shows the 'Recruitment' settings form. It has 'Apply' and 'Cancel' buttons at the top. Under the 'Recruitment' heading, there is an 'Interview Form' section with two radio button options: 'Do not use interview forms' and 'Use interview forms during the recruitment process'.

Once you enable the option you can see an option in Job creation window to add Questionnaires

The screenshot shows the 'Create: Interview Form' window. It has a title bar with a close button. Below the title bar is a progress bar with buttons for 'Design Survey', 'Draft', 'In progress', 'Closed', and 'Permanent'. The 'Design Survey' button is active. The main area has a 'Title' section with a text input field containing 'Survey Title'. To the right of the title is a box showing '0 Answers'. Below the title is a tabbed interface with 'Edit Pages and Questions' and 'Options' tabs. The 'Edit Pages and Questions' tab is active, showing a table with columns 'Page Title' and 'Questions'. Below the table is an 'Add an item' button. At the bottom of the window are 'Save' and 'Discard' buttons.

- Use Add an Item to add fields to your form
- After completion <save>

Apply for job

Odoo provides a complete solution for recruitment process. Once you publish the created opportunities in website, jobseekers can view the same. User can view detailed advertisement and Apply by just clicking on the advertisement.

The screenshot shows a job advertisement for an 'Experienced Developer' in Scranton, United States. The page has a navigation bar with links: Home, Shop, Jobs, shop2, main, Contact us, new, and Administrator. The job title is 'Experienced Developer' with a location pin icon and 'Scranton, United States'. There is an 'Apply Now!' button and a 'Published' status dropdown. Below the title, a description states: 'You will be responsible for developing and improving applications. You will work autonomously as well as coordinate and supervise small distributed development teams for specific projects. You will become a technical expert of the product.' The advertisement is divided into three columns: 'Responsibilities' (What you will do ...), 'Skills' (Must have ...), and 'Nice to have' (Close to the perfection ...). The 'Responsibilities' column lists: 'You will work closely with all developers', 'You will report to the head of R&D', 'You will initially be coached by senior developers', 'You will become a technical expert of the product.', and 'Work in a fun atmosphere'. The 'Skills' column lists: 'Master or engineer in computer science', 'Preferably 1 year of experience', 'Good knowledge of object oriented programming', 'Good knowledge of web design', 'Good knowledge of HTML and Javascript', and 'You autonomously and quickly learn'. The 'Nice to have' column lists: 'Good knowledge of the programming language', 'Good knowledge of the latest web technologies', 'Good language skills in another language', 'Contributions to open source projects', 'Passion for the Internet and its culture', 'Quick and autonomous learner', and 'Team spirit and good communication'.

The screenshot shows the 'Job Application Form' for the 'Experienced Developer' position. The form has a navigation bar with links: Home, Shop, Jobs, shop2, main, Contact us, new, and Administrator. The title is 'Job Application Form' and 'Experienced Developer'. The form fields are: 'Your Name *', 'Your Email *', 'Your Phone Number *', 'Short Introduction', and 'Resume'. The 'Resume' field has a 'Choose File' button and 'No file chosen' text. There is a 'Submit' button at the bottom.

By clicking on <Submit>. User submit his application.

Process Job Application

Recruitment administrator can view all the application and related personal information listed in his dashboard.

Recruitment > Job Position

Job Positions Search... 1-8 / 8

[Create](#)

Chief Executive Officer More Application(s) Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 1	Chief Technical Officer More Application(s) Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 1	Consultant More Application(s) Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 1
Experienced Developer More Application(s) Document(s) 1 Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 4	Human Resources Manager More Application(s) Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 1	Marketing and Community Manager More Application(s) Document(s) 1 Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 3
Trainee More Application(s) Document(s) 1 Interview Form Recruitment Done Hired Employees <input type="text"/> 0 / 1	sales More Application(s) Recruitment Done Hired Employees <input type="text"/> 0 / 1	

- Click **<Application>** View the applicants and their recruitment status.

Job Positions / Applications Search...

[Create](#) Grid List Calendar

Initial Qualification	First Interview	Second Interview	Contract Proposal
Enrique Jones Sales Manager Marketing and Community Manager Mobile: 9963214587 08/15/2017 : Send mail regarding our interview 1 Documents	David Armstrong Finance Manager Human Resources Manager 08/18/2017 : Send mail regarding our interview 0 Documents	Jose Fresher Trainee 08/05/2017 : Send mail regarding our interview 1 Documents	Marie Justine Trainee - MCA Trainee Mobile: 9988774455 08/10/2017 : Call to define rea 0 Documents training
	David Armstrong Advertisement Consultant Mobile: 9988774455 08/15/2017 : Send mail regarding our interview 1 Documents		Shane Williams Programmer Experienced Developer Mobile: 9812398524 08/24/2017 : Send mail regard 1 Documents
			Tina Augustie Trainee - MCA Trainee Mobile: 9898745745 08/15/2017 : Send mail regard 0 Documents

- Just drag and drop to change the status of employees

Odoo Point of sales

The shopping and consumption characteristics of consumers are changing rapidly. Unlike in the past, the customers don't have much time to spend in shops to find their desired product. Consequently, E-commerce sales are rising. Modernization and digitalization in every possible point will make shopping more interesting and hassle-free. 'Point of Sale' is an opportune place where you can utilize this digitalization technique to give an excellent customer experience. POS is the place at which a retail transaction is carried out. Generally, billing and final adjustments are made at this point. Odoo POS module combined with hardware components like the barcode scanner, POS box, etc. perform the sales procedure.

Most of the present ERP systems provides Point of Sale option with varying configurations. Apart from speedy billing option, an excellent POS can facilitate functionalities like, discount and Loyalty programs support, multiple payment type support, serve multiple customers at a time and customer specific management, Accounting etc. To enable features like this, a POS system must be integrated with CRM, Inventory, Accounting and other necessary modules in the ERP. The detailed analysis report is another must-have feature in every POS system. Sales analysis on each POS is the key factor to take sales improvement decision.

Odoo POS is an excellent ERP where you can find all these features by default. Moreover many add-ons and apps from Odoo app store further enhance the capabilities of Odoo POS like in every other module. The Simple and user-friendly interface of Odoo Point of sales module lets the user configure and complete his all sales needs with hassle-free steps.

Some of the feature [15] which makes Odoo a well performing POS app are;

- **Payments**

- ***Payment methods***

- Cash, checks, and credit card payment methods are available. New types of payment methods can be added as well.

- ***Credit/Debit cards***

- All electronic payments are handled by external payment terminals.

- ***Split tenders***

- A single order can be paid as a split payment between multiple parties as well as with separate payment methods.

- ***Currency rounding***

- Prices and payments can be rounded to the smallest denomination of the currency.

- ***Offline payments***

- Orders made offline are automatically synchronized when you are reconnected.

- ***Invoicing***

- Generate and print invoices for your business customers.

Accounting

Payments are directly integrated into Odoo Accounting to make bookkeeping simple and reliable.

Customer tips

Supports customer tipping either as an added amount or by converting change to a tip.

- **Checkout**

Prices & discounts

Set customer prices or offer percentage-based discounts on either a single product or the entire order.

Parallel orders

Put orders aside and process multiple orders at the same time.

Customized receipts

Advertise your current promotions, hours of operation, and upcoming events on your printed receipts.

Weighting at the counter

Calculate product weight during checkout with the electronic scale integration.

Blazing fast search

Quickly find your customers and products with the built-in search features.

Sell on the move

With iPad and Android tablet support, sell anywhere within your store or restaurant.

Dynamic barcodes

Embed price, weight, and discount information directly into your barcodes.

- **Store Management**

Order history

View all past orders as well as search by customer, product, cashier, or date.

Daily sales

Keep track of daily sales and totals for every payment type.

Cashier accounts

Manage multiple cashier accounts and secure them with badges or pin codes.

Cash flows

Monitor cash register adjustments and easily verify cash contents at the end of the day.

Stock & Inventory

Monitor your stock in real-time, manage your inventory across all locations, and review shipments with the Odoo Stock integration.

Franchises

Pre-configure your franchises stores, overview their sales, and centrally manage their stock and accounting.

- **Customer & Loyalty**

- Register customers***

- Identify your customers by simply registering their email and contact address, allowing you to offer discounts and keep track of individual sales.

- Identify customers***

- Look-up your customers with the built-in search feature or identify them with a barcode printed on their loyalty card.

- Business Customers***

- Register your customer's VAT number and apply them to invoices.

- Loyalty Cards***

- Reward your customers with loyalty points and exchange them for gifts or discounts. Points can be earned by product, by order, or by sale amount.

- **Restaurant Management**

- Floor plans***

- Assign orders to tables and receive an overview of your restaurant's floors as well as make changes on the go with the graphical editor.

- Manage seating***

- Keep track of your guests with an overview of your restaurant's capacity and table availability.

- Kitchen printing***

- Send the order instructions to the bar and kitchen printers. Instructions can be sent to different printers automatically based on the product category.

- Delayed orders***

- Take orders for different courses of the meal at once with the ability to send them to the kitchen printer at separate times.

- Kitchen order notes***

- Add notes for customer's preferences, allergies, or special requests and send them to the kitchen or bar printers.

- Split bills***

- Let customers pay separately or at different times by splitting orders.

- **Products**

- Product categories***

- Organize your products with hierarchical product categories. Order them by popularity and display different categories in different point of sales.

- Product Search***

- Quickly find products by their name, barcode, or description with the built-in search function.

Units of measure

Sell your products with custom or preset units of measure and update your stock accordingly.

Multiple barcodes

Configure multiple barcodes for the same product with barcode nomenclatures.

Product variants

Sell different sizes, colors, or configurations of the same product with product variants.

Large product count

Odoo's Point of Sale system is capable of performing at a scale of over 100,000 products.

- **Web Application**

Browser support

Odoo POS is a web-based application and can be deployed on any device and OS running Chrome, Firefox, or Safari. Microsoft Windows, Apple OSX, Linux, Android, and iOS are all supported operating systems.

PC compatible

Odoo POS can also be used on standard PCs and tablets as well as industrial touch-screen terminals.

Works offline

Odoo's POS will keep working while offline. The web browser can be closed offline without loss of data.

HTML5 mods

Odoo's POS is Open-Source and can be customized with HTML5/JS extension modules [15]

By default, there are two types of user in Odoo POS module. Admin can create and assign this role to any of his employees.

- **Manager**
He has complete control over all the POS nodes. He configures, monitor and manage it. He creates a POS and assigns it to any user. He can also Add and Update product information.
- **User:-**
This user will have access to only those POS assigned to him. He can log in to his POS and start the session.

How Odoo POS works

Manager creates and configures each POS nodes in Odoo POS. The system administrator can assign this POS node to appropriate users from 'Point of Sale' tab in the user profile. When a POS user login to the system, he will be directed to his POS dashboard. From there he can perform sales operations. A user must start a new session or resume an existing session to perform sales operations. Moreover, a user cannot use two Point Of Sale sessions simultaneously. The important point to note in Odoo POS is that the Point Of Sale session must be closed and validated in order to generate all the accounting entries. When a salesperson close and validate his session the respective entries will be passed to accounting module, from here, the authorized person can commit the transactions made.

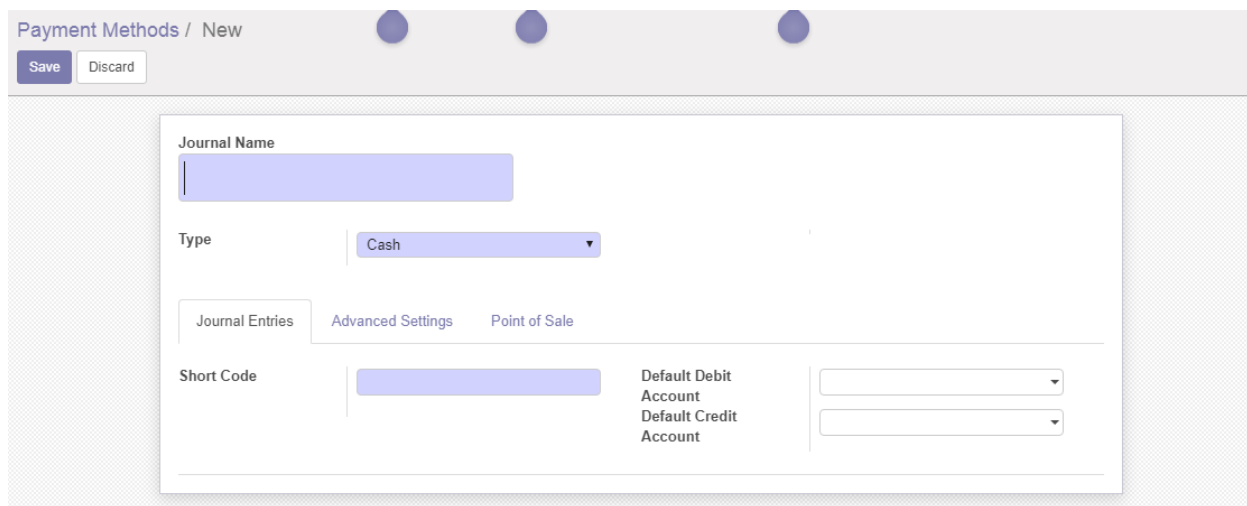
Some other distinctive feature of Odoo POS is listed below.

Basic Configuration

Setting up new payment method

To add new payment method to your POS system follow the steps.

- Click <**Payment Methods**>option under Configuration tab, and click on <**Create**> button, which will guide you to the following window

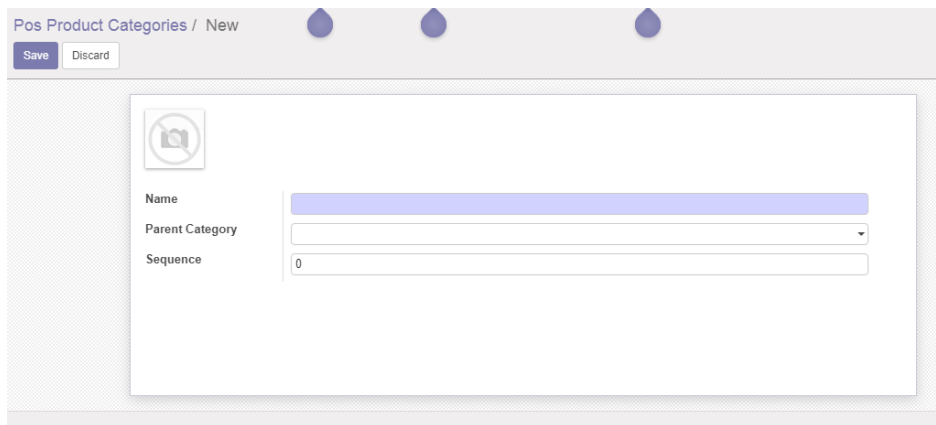
The screenshot shows the 'Payment Methods / New' configuration window in Odoo. At the top, there are 'Save' and 'Discard' buttons. The main form contains a 'Journal Name' text field, a 'Type' dropdown menu set to 'Cash', and three tabs: 'Journal Entries', 'Advanced Settings', and 'Point of Sale'. Below the tabs, there is a 'Short Code' text field, and two dropdown menus for 'Default Debit Account' and 'Default Credit Account'. The 'Advanced Settings' tab is currently selected.

Click <**Advanced Settings**>, <**Point of sale**> tabs to find more customizable options.

Creating new product category

Your product list can be customized/categorized according to your needs. To create a new product category follow the below procedures

- Click **<POS Product Categories>** option under Configuration tab, and click on **<Create>** button, which will guide you to the following window



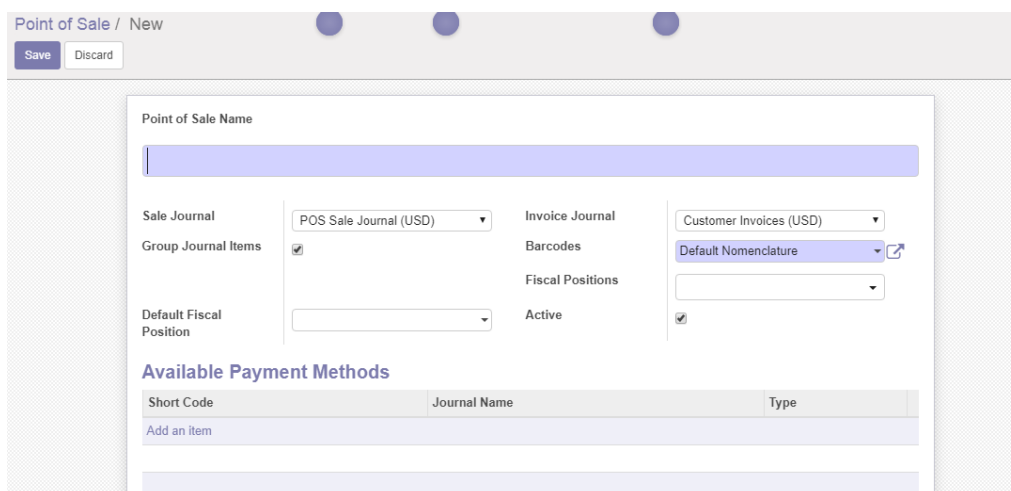
- Fill all the fields and **<save>** new category.

Note: - “you can delete or edit any particular category from the same menu.”

Creating new Point of Sale

You can create any number of point of sales. When you create a user you can see an option to assign a POS to the user.

- Click **<Point of Sale>** option under Configuration tab, and click on **<Create>**, button, which will guide you to the following window



- Fill all the necessary fields including Journal, payment methods for POS etc. and click **<Save>**.

Adding new products to list

To Add new products to your list follow the below procedures

- Click **<Product>** option under **<Orders>** tab, and click on **<Create>**, button, which will guide you to the following window

Fill the fields with product specification. Toggle between **General Info, Inventory, Sales, and Invoice** tabs to find more options and settings for the product and **<save>**.

Note: - “you can edit details of any particular product from the same menu (i.e. **<Product>** option under **<Orders>** tab) by clicking the image of respective product”

Other miscellaneous configurations.

You can find some useful and important settings like activating card payment, activating restaurant mode, etc. in **<settings>** menu under **<Configuration>** Tab

Importable Point of Sale Data

Beverages ☐ Import common drinks data

Point of Sale

Restaurant ☒ Point of sale for shops ☐ Restaurant: activate table management

Discount ☐ Allow discounts on order lines only ☒ Allow global discounts

Credit Cards ☒ No credit card ☐ Allows customers to pay with credit cards.

Reprints ☒ No reprint ☐ Allow cashier to reprint receipts

Loyalty Program ☐ Manage loyalty program with points and rewards for customers [Enterprise](#) [More Info](#)

POS Restaurant mode configuration

- Find Activate table management option from **<settings>** menu under **<Configuration>** tab.

Point of Sale

Restaurant

- ☐ Point of sale for shops
- ☒ Restaurant: activate table management

Floor and Table planning in Restaurant

Customize the floor and seating arrangement in you restaurant (this option will be available only after activating Restaurant configuration as in sec. 2.1)

- Click **<Floor Plans>** option under Configuration tab, and click on **<Create>**, button, which will guide you to the following window

- Click **<Add an Item>** to add Tables and manage seating arrangements on that floor.

Note: - “you can edit details of any particular Table/Floor from the same menu (i.e. **<Floor Plans>** option under **<Configuration tab>**).

Add new Printer

Attach new printer to your POS (this facility is available only after you have activated restaurant mode).

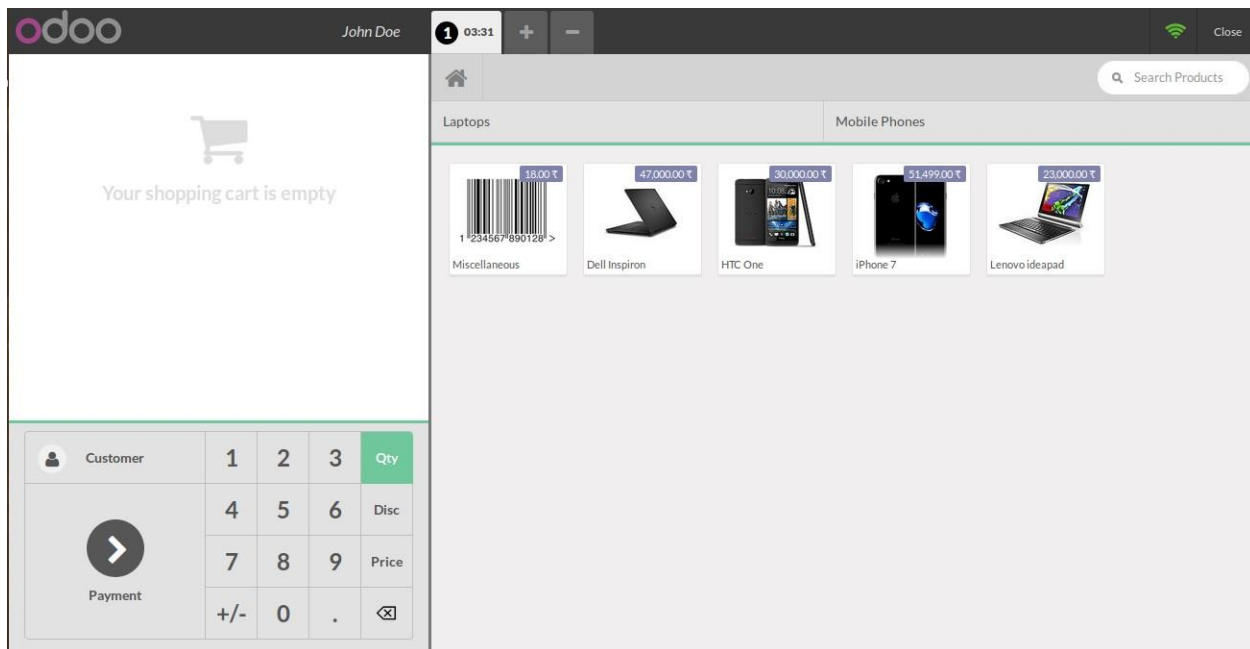
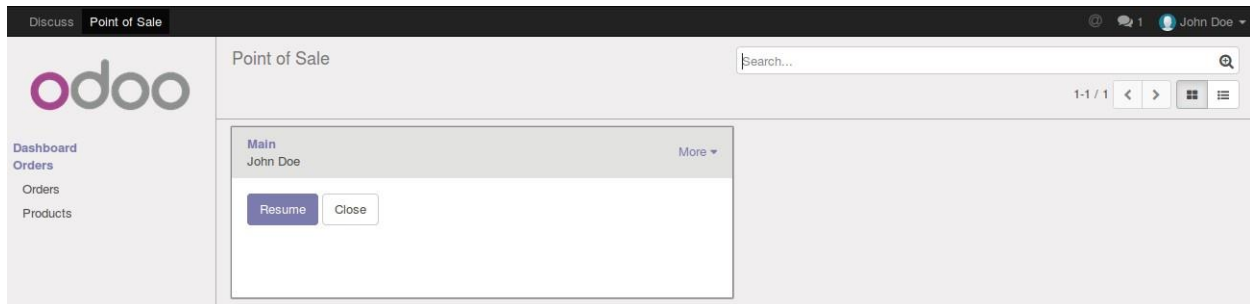
- Click **<Product>** option under Orders tab, and click on **<Create>** button, which will guide you to the following window

Fill the fields with printer info and **<save>**.

Sales management

Making an Order

- Once the user you login to POS, the main dashboard will be like below. <Create> a new Session or <resume >an existing Session to make an order



- Click on the product to add to Cart (the amount will be updated automatically)
- Use <QTY> button to enter no of quantities
- Use <Price> button to enter price manually
- Use <Disc> button to allow discount
- Click on <Payment> button to proceed to payment.

« Back

Payment Validate »

Due	Tendered	Change	Method
219,104.44	220,000.00	895.56	Cash (INR)

1	2	3	+10
4	5	6	+20
7	8	9	+50
C	0	.	<X>

Customer

Invoice

- Choose the payment method from list.
- Click **<Validate>** to generate invoice. Or you can
- Click on **<Customer>** to select a customer from your system
- Use **<Invoice>** option to generate invoice against the customer.
- Once the validate button is clicked system generate invoice.

Making an Order (Restaurant Configuration)

- Select the Table/Floor from the list
- Click on the product to add to Cart (the amount will be updated automatically)

Administrator

« Patio (T5) 12 03:47

Computer Desk \$ 2,250.00
1.000 Unit(s) at \$ 2,250.00 / Unit(s)

Total: \$ 2,587.50
Taxes: \$ 337.50

Fruits and Vegetables

\$ 700.00
Air Flight

\$ 0.50
Car Travel Expenses

\$ 2,250.00
Computer Desk

\$ 2,000.00
Table Head

\$ 18.00
Miscellaneous

\$ 180.00
External Audit

\$ 1.98/kg
Miscellaneous

\$ 999.99
campocamp

Note → Transfer 1 Guests

Bill Split Order

Customer

Payment

1	2	3	Qty
4	5	6	Disc
7	8	9	Price
+/-	0	.	<X>

- Use <Split> option to split bill
- Use <Transfer> option transfer the table
- If completed, proceed to <Payment> option
- You can choose <Customer> option to generate bill against an existing customer

Print the receipt and Click **<Next Order>** to make another order. Click **<Close>** button to close the session.

Reports Generation

- Select **<Order>** option under <Reports> tab to generate Order report.
- Select **<Sales>** option under reports tab to generate sales details of a particular time period.

Odoo Website Builder

With the help of Odoo website builder you can to develop stunning websites without much effort. This feature enables any normal user to develop his own company's online presence. The website serves multiple purposes for your company. On the one hand it publishes information about your company and on the other hand, it can act as E-commerce site (See E-commerce module), HR Recruitment Portal (See HR module), and Customer portal (See Project management). You can explore these features from those modules. Here we will be discussing basic website builder functionalities. Following are some features [16] of Odoo Website builder.

- **Intuitive system**

- ***What you see is what you get***

- Insert text styles like headers, bold, italic, lists and fonts with a simple WYSIWYG editor. Flexible and easy to use.

- ***Building blocks system***

- Create your page from scratch by dragging and dropping pre-made, fully customizable building blocks.

- ***Front end management***

- Click and change content directly from the front end: no complex back end to deal with.

- ***Word processor text editing***

- Create and update your text content through an editor designed to replicate the word processor experience.

- **Increase visits**

- ***Promote Tool***

- Improve your ranking on search engines and your organic traffic thanks to keywords suggestions and Meta tag tool.

- **Convert leads**

- ***A/B test your pages***

- Run several versions of one page to find out which one drives better results. Analyze results directly on Google Analytics.

- ***Multi-version***

- Prepare multiple versions of your website and switch from one to another in one click.

- ***Link tracking***

- Add a tracking code to your URL's and measure all your marketing campaigns from the first click to the final sale. Identify which campaigns are the most effective in attracting visitors to your website and generating revenue.

- **Enhance user experience**

Translation tool

Get professional standard translations with Gengo integration.

Mobile preview

See what your page will look like on a mobile device with the mobile preview button.

Social media call-to-action

Share your pages through social media networks.

Live chat embedded

Provide your visitors with information in real time directly on your website through a popup chat window.

- **Design features**

Bootstrap based templates

Easily design your own Odoo templates thanks to clean HTML structure and bootstrap CSS.

Fluid grid layout

Create the best layout corresponding to the devices on which the website is displayed.

Professional themes

Change theme in just a click, and browse through Odoo's catalog of ready-to-use themes available in our app store. [16]

System Users

By default, there are two types of user in Website related modules.

- **Editor and Designer:**

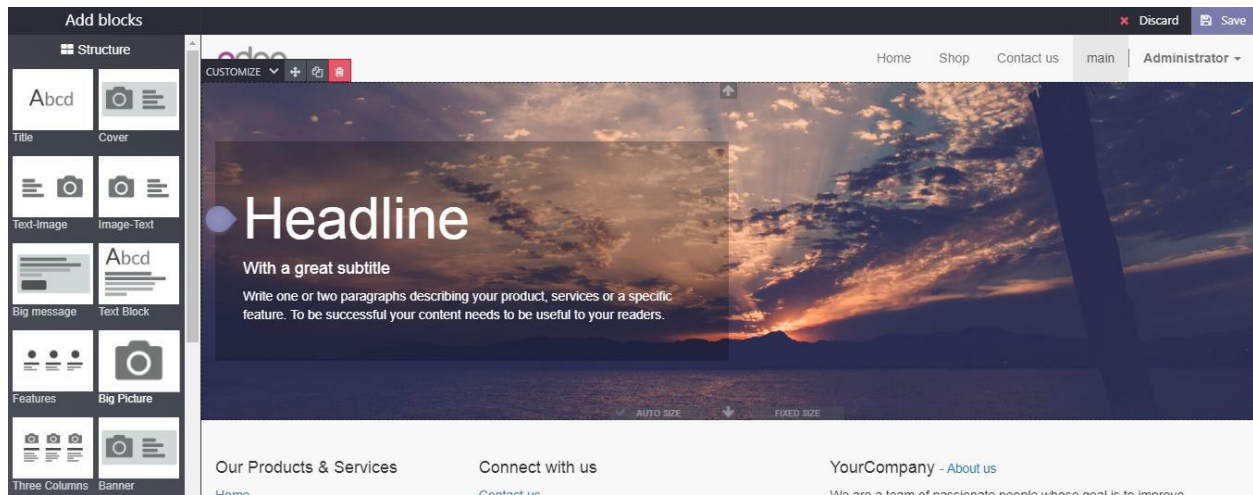
Like manager in other modules, he can access both frontend and backend of your Website. He configures your website and changes its settings like setting up payment gateway, giving portal access to customers etc.

- **Restricted Editor:-**

Basically front end (i.e. portal) designer. Generally, he can alter only the portal view of the site.

Add your first Page

- Login as administrator
- Click <New> button on top right corner,
- Enter page name and click <Continue>



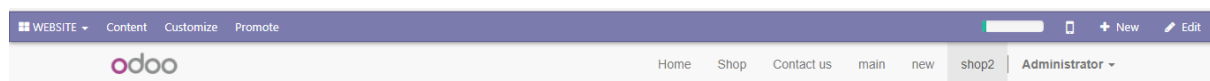
It will give you a default page and tools to design the page just **Drag and Drop the contents**

Click on any element to customize it

- Use the different design tools to make your website more attractive

Don't forget to save the current design once you finished

- To get mobile view of the website you can click, mobile preview button which is in the top left Side of menu bar.
- Once you save the page, the page will be displayed on 'Menu bar'

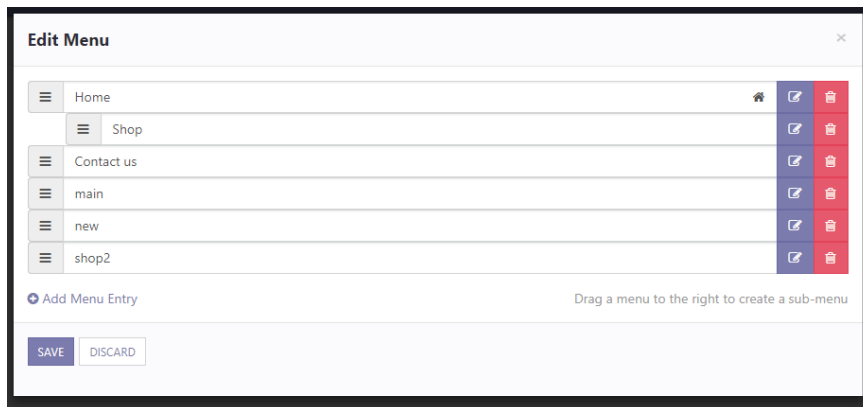


Customize menu and appearance

Menu and page customization

You can change the appearance of your website including Menu, and product view easily. To customize menu follow

- **Website > Content > Edit Menu**

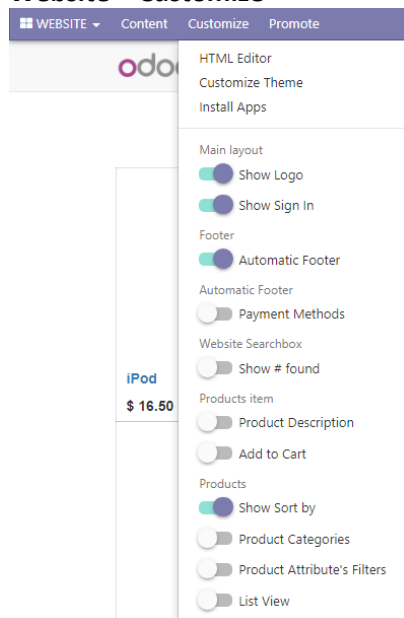


This window will assist you to create new menu options, create submenu and delete menu options.

Appearance customization

To change the appearance of the website like the way your products are listed etc. follow

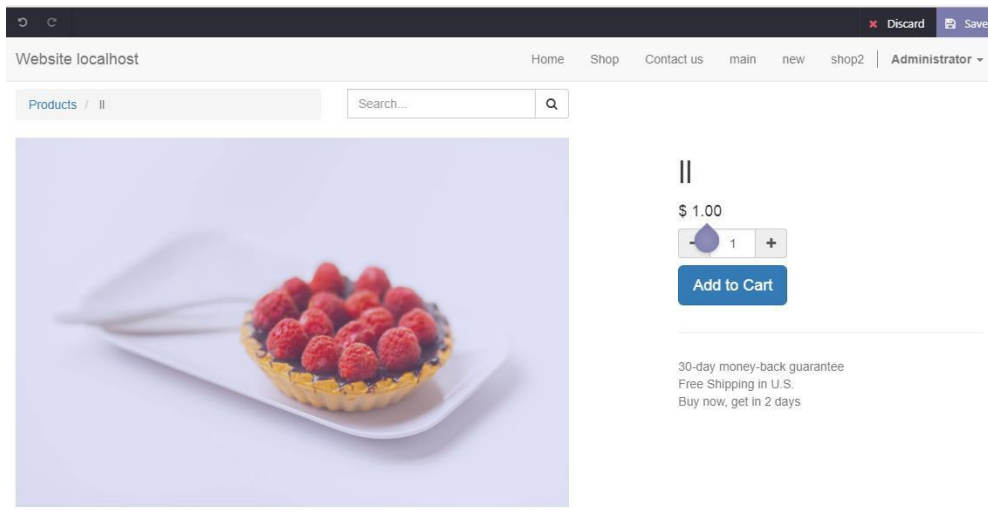
Website > Customize



Choose from many of the useful options available to make your website more user-friendly

List your products on site

- **Website > New > New product**

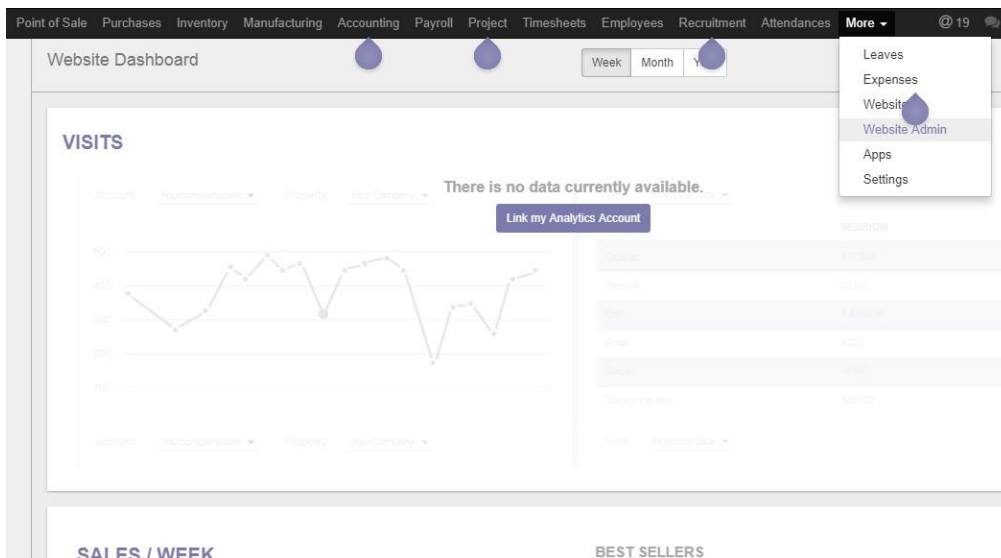


- Fill the name, image and cost and click **<Save>**

SEO Integration

Odoo SEO tools combine with Google to check the relevancy of your content in real time. Get more visitors with a better-targeted content. Admin can access this facility from

- **Website Admin > Settings**



Here you can see the options to track and manage performance of your Website. And you can access some other settings from

- Website > Promote > Optimize SEO

Promote This Page Get this page efficiently referenced in Google to attract more visitors. ×

1. Define Keywords

describing your page content

Add keyword:

Language:

English

ADD

Most searched topics related to your keywords, ordered by importance:

2. Reference Your Page

using above suggested keywords

Title

Description

3. Preview

how your page will be listed on Google

SAVE

DISCARD

E-commerce

This feature make Odoo more powerful than any other competitor. Odoo E commerce App supports you to sell your products online. You can design your own site with simple steps. Add products, configure payment and delivery methods and let public to access your site, all in simple steps. Since it is integrated with other modules like CRM, Sales, and Inventory Odoo can provide and effective platform for your business. You just have to install the eCommerce application from Odoo apps store. To further enhance the system capabilities you may install eCommerce delivery, and eCommerce optional products.

Odoo E-commerce module displays competitive features when compared to CMS service providers like Magento and Shoppify. The most promising thing is that many add-on features in other CMS service providers are built in components in Odoo. Odoo enjoys the advantage of features like Product Inline Page Builder, Drag and Drop Page Builder, Buy Without Sign Up, Inline SEO Suggestion, Link tracker etc. over Magento. And over shoppify, Odoo has the advantage of options like Stock Available, Drag and Drop Page Builder, Integrated A/B testing, Inline SEO Suggestion, Multi Store Support, Advanced Taxes etc.[17]

Some of the useful features [18] of Odoo are below.

- **Design & configure**

- Inline Editing***

- Create product pages using Odoo's unique 'edit inline' approach. No code required, what you see is really what you get.

- Building blocks system***

- Create your product page from scratch by dragging and dropping pre-made, fully customizable building blocks. Describe products in a table to give maximum of specifications.

- Sell digital products***

- You can now add digital products like eBooks to your online catalog.

- Word processor text editing***

- Easily create and update your text content through an editor designed to replicate the word processor experience.

- Product variants creation***

- Create a product available in several variants, like size, colors or other attributes.

- Price-lists, products and stores***

- Create flexible price-lists, add variants to add to products options, and create multiple stores under one environment. Display available stock on products.

- **Integrated tools**

- ***Cross-selling and Upselling***

- Suggest optional products related to items to increase your revenues.

- ***Promotional or coupon codes***

- Encourage potential customers using promo codes and coupons.

- ***Options to boost sales***

- Define product categories, use attribute search, focus on promotions, coupons or gift certificates and push best products to the top of your page in order to multiply your sales.

- **Shopping experience**

- ***Easy search system***

- Make finding products easier by setting attributes on products (size, color, power, etc.).

- ***Customer on boarding***

- Setup step by step instructions to help customers go to checkout with no blocking issues.

- ***Guest & registered user***

- Customers can choose to create a user profile or as guests. Registered users can retrieve their contact information upon check out and access a portal including related messages, orders, invoices, registered claims, etc.

- ***Skip shipping address***

- Shipping address no more required when providing only services.

- ***Live chat embedded***

- Provide your visitors with information in real time directly on your website, and secure your sales.

- ***Easy checkout process***

- Simple checkout to avoid losing clients.

- ***Customer portal***

- Access tracking of orders, advanced shipping rules and return management through the customer portal.

- ***Order review***

- See details of your order at the end of the process.

- **Payment methods**

- ***Fully integrated***

- Allow customers to pay with Paypal, Ogone, Adyen, Buckaroo, Authorize.net and SIPS Wordline. Online payment methods redirect customers to a 'Thank you' page on your website.

- **Billing & Accounting**

Calculate & Bill Shipping Costs

Get delivery costs computed automatically using Odoo's embed Delivery Method configurator.

Integrated Accounting package

Odoo's chart of accounts contains national taxes, fiscal positions, accounts.

Tax rates

Fiscal positions allow you to adapt tax rates to the whereabouts of your customers.

Chart of accounts

Use the Custom package template to build your own chart of accounts. It embeds a set of generic preset accounts, taxes and more.

- **Reporting**

Sales data analytics

Highlight the best product in terms of quantity sold. Find the best customer in terms of revenue. Display a graph with your monthly sales per product and add it to your Dashboard. Group your Sales by Partner and display the products in the column header.

[17]

System Users

By default there are two types of user in Website related modules.

- **Editor and Designer:** Like manager in other modules he can access both front end and back end of your website. He configure your website and change its settings
- **Restricted Editor:** - Basically front end (i.e. portal) designer. Generally he can alter only the portal view of the site and products with some restriction etc.

Product Management

Add new Product

Website Admin > Products > Create

Products / New

Save Discard

Product Name

Product Name

☒ Can be Sold

☒ Can be Purchased

☐ Can be Expensed

Active Published On Website Traceability

Bill of Materials Manufacturing Purchases Sales

General Information Inventory Sales Variants Invoicing Notes

Product Type Consumable Sale Price 1.00

Internal Reference

Barcode

Internal Category All Control Purchase Bills

On ordered quantities On received quantities

Fill all necessary fields by switching to 'inventory', 'sales', 'variants', 'invoicing', tabs and <save> the product. It will be added to your website

Edit Product Details


You can **Update/Edit** a product details buy just clicking on the product image from

- **WebsiteAdmin > Products**

Products / [E-COM08] Apple In-Ear Headphones

[Edit](#) [Create](#) [Print](#) [Attachment\(s\)](#) [Action](#) 1 / 7

[Update Qty On Hand](#) [Procurement Request](#)



Apple In-Ear Headphones

☒ Can be Sold
☒ Can be Purchased
☐ Can be Expensed

<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Published On Website	18 On Hand
18 Forecasted	<input checked="" type="checkbox"/> Traceability	0 Reordering R...
0 Bill of Materials	0 Manufacturing	0 Purchases
		\$ 0 Sales

General Information

Inventory

Sales

Variants

Invoicing

Notes

Product Type	Stockable Product	Sale Price	\$79.00
Internal Reference	E-COM08	Cost	\$70.00
Barcode			
Internal Category	All / Saleable / Physical	Control Purchase Bills	On received quantities

[New message](#) [Log an internal note](#) [Following](#) [1](#)

- Click <Edit> button to edit product info
- <Update Quantity in Hand> to update quantity manually


Add new Product Category

To add new product category go to

Website Admin > Configuration > Website Product category > Create

Website Product Categories / New

[Save](#) [Discard](#)



Name

Parent Category

Sequence

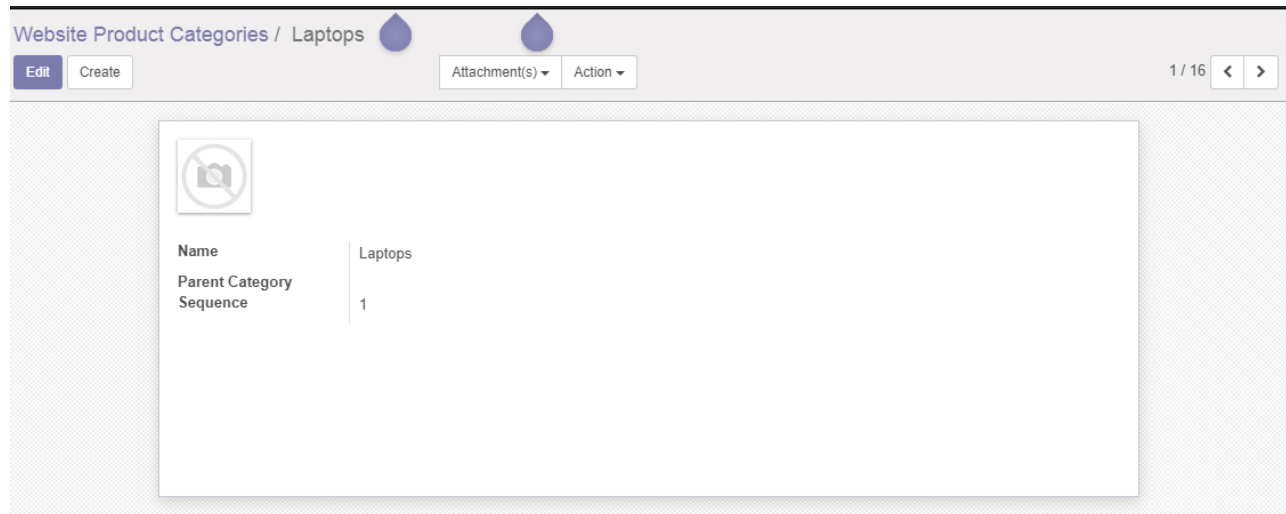
Choose the parent category (if applicable) and save

Edit Product Category

Delete or Edit a product category

Website Admin > Configuration > Website Product category

- Click on any of the listed category to update or delete it

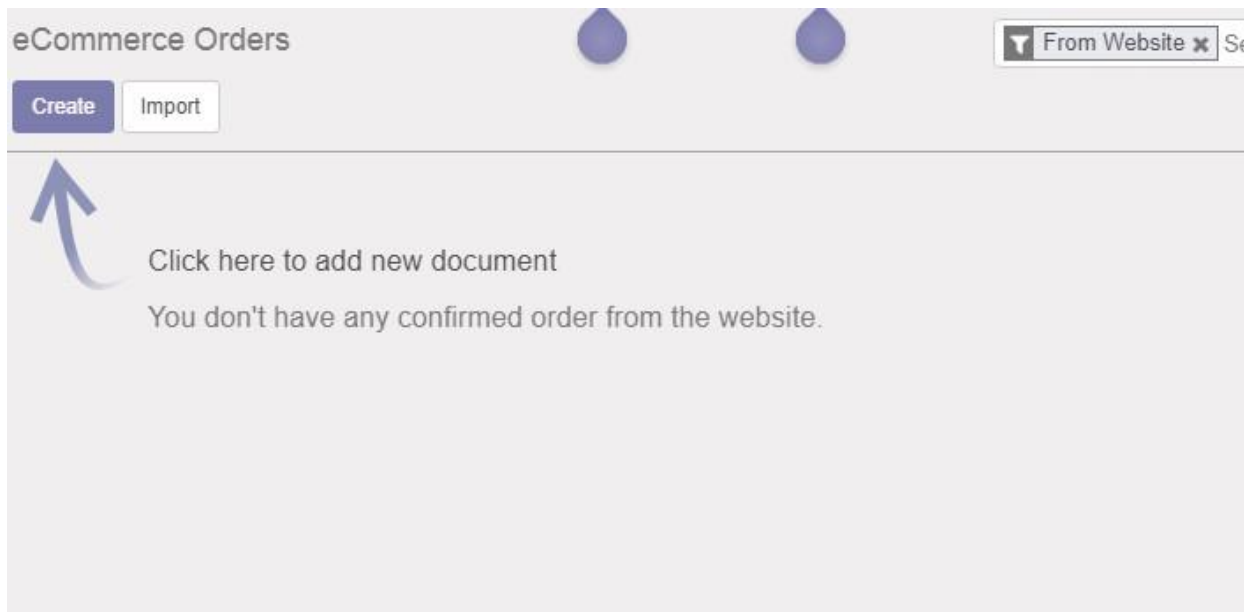


Order Tracking

View Order

To view orders received to you web site

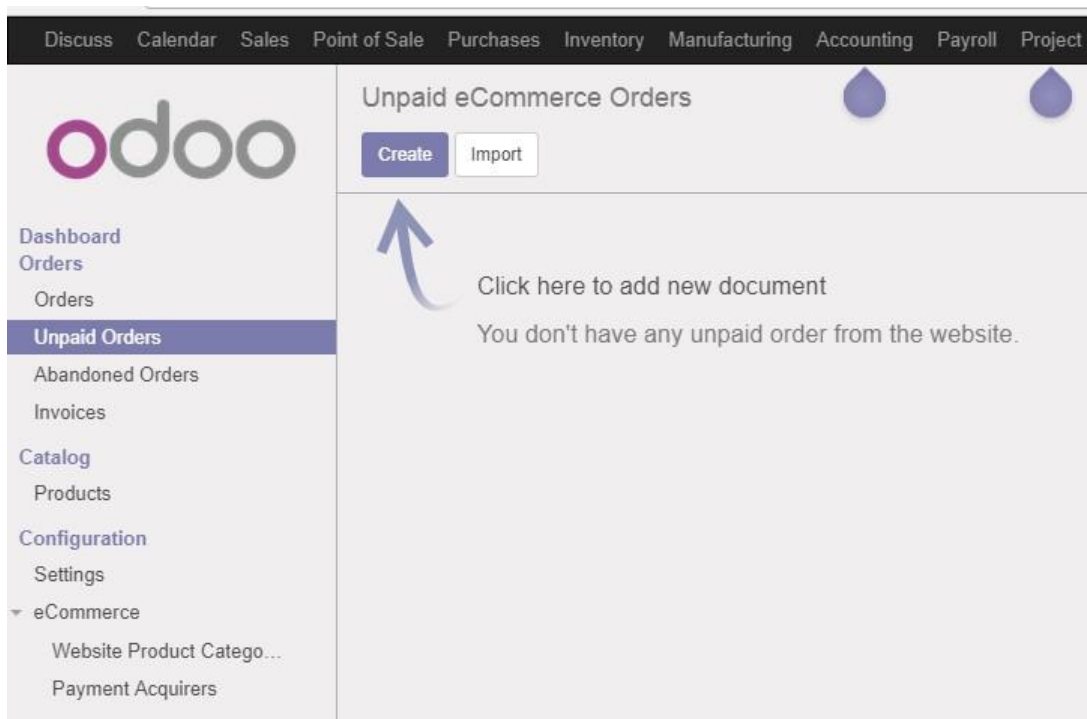
Website Admin > Orders > Order



Note: - There is an option to create order manually if needed.

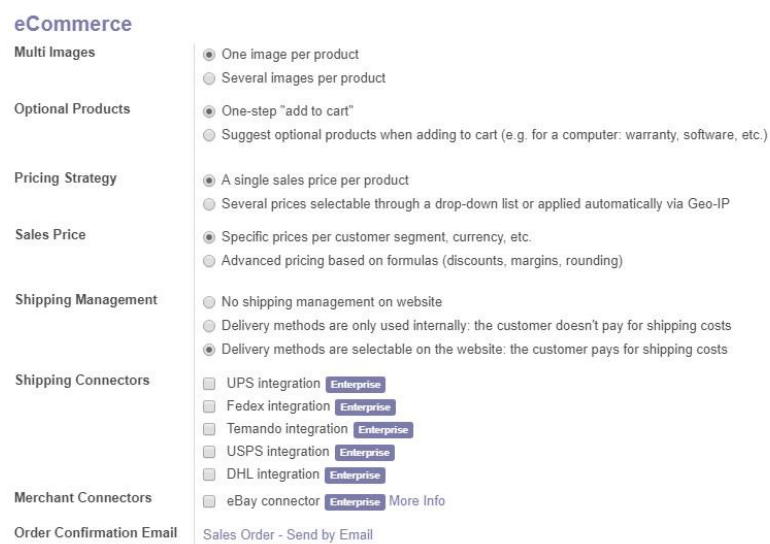
View Unpaid Order

- **Website Admin > Orders > Unpaid Order**

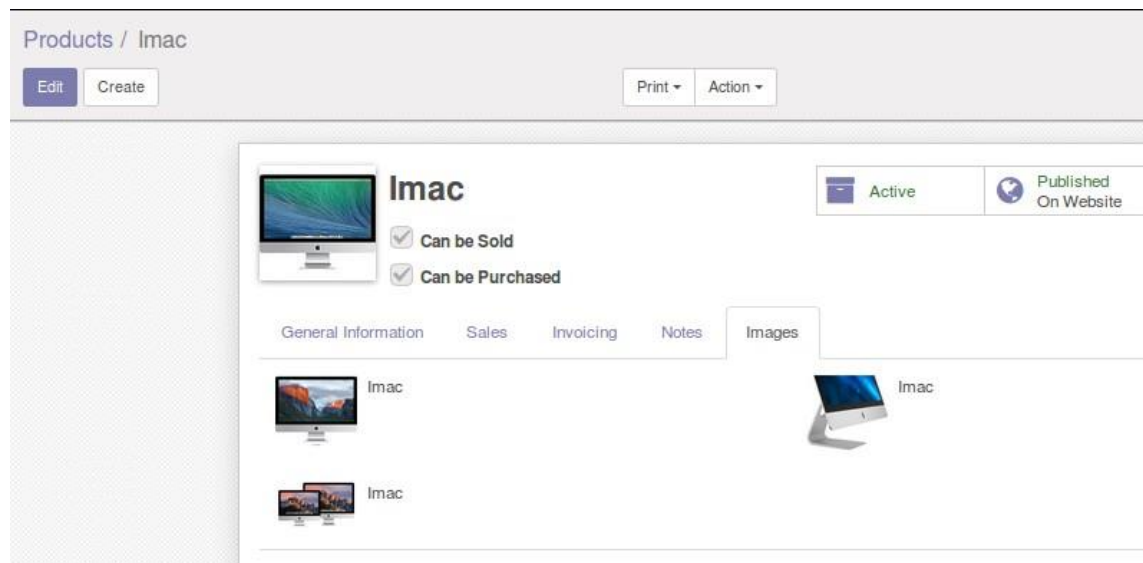


Website Settings

If we navigate to **website admin > Configuration > Settings**, then we can see more option that we can enable in our website, now let us look into it.



E.g.:- Multiple image enabled product. (Settings 1)



(Adding multiple images)



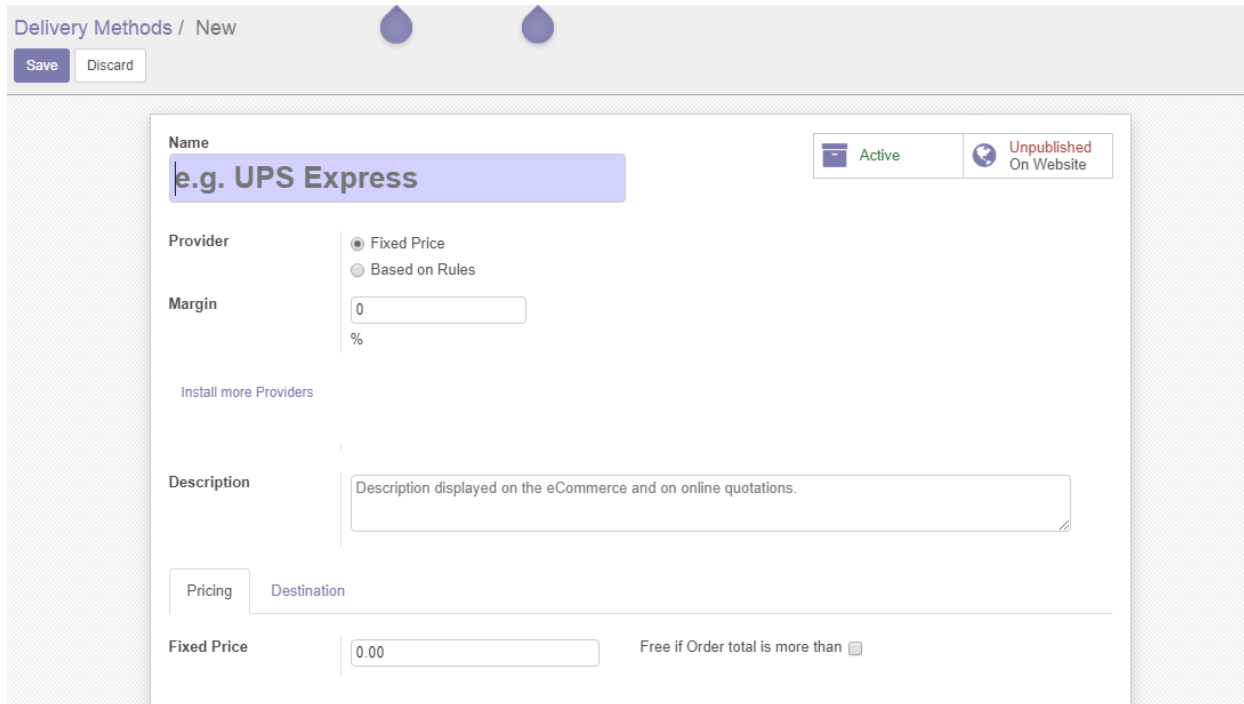
User view of a multiple image enabled product

Like ways administrator change the settings to improve user experience from the above panel

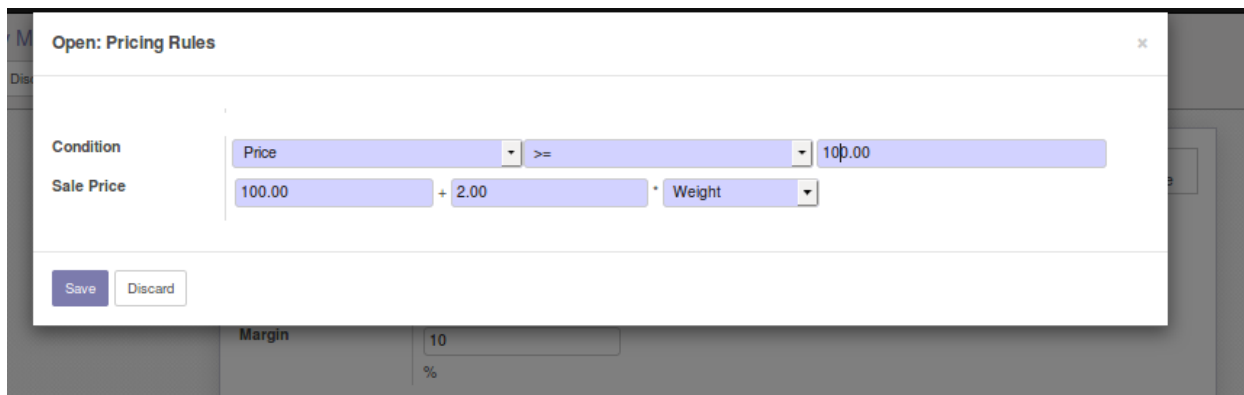
Set up delivery options

Inventory > Configuration > Delivery > Delivery Methods.

(To view this option you must activate delivery methods are selectable on the web site option from settings)



Fixed Price and **Based on Rules** two option available to set up payment option. Using **Based on Rules** option you can customize delivery method.

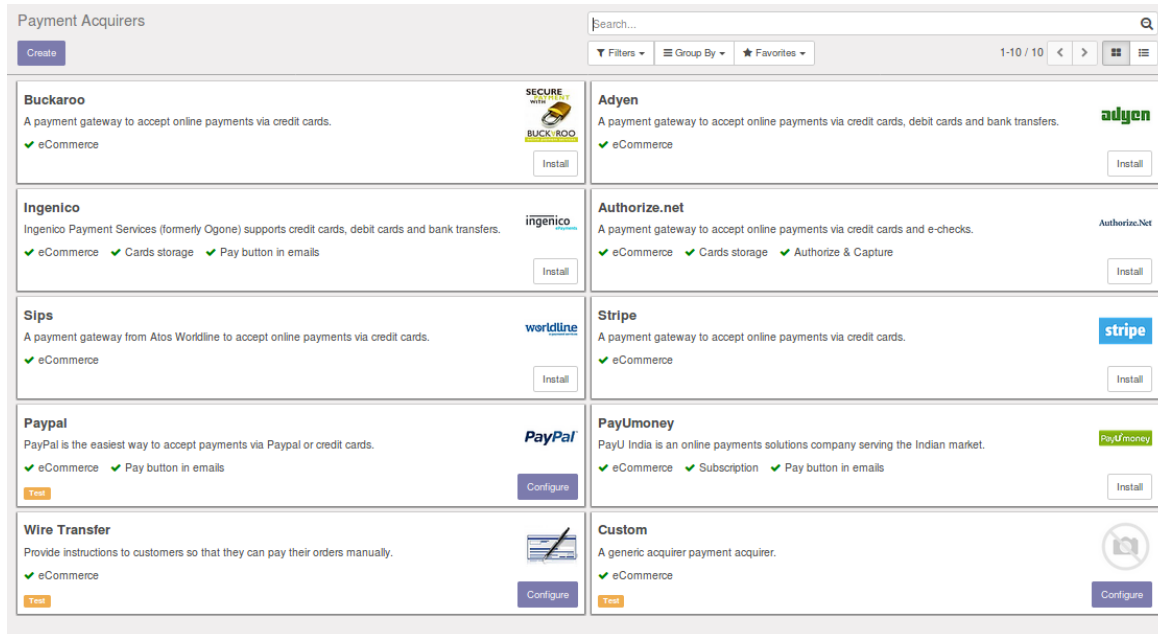


Note:- the very important things is that you must click 'Published on Website' button before you quit the wizard to make the new delivery option available to users

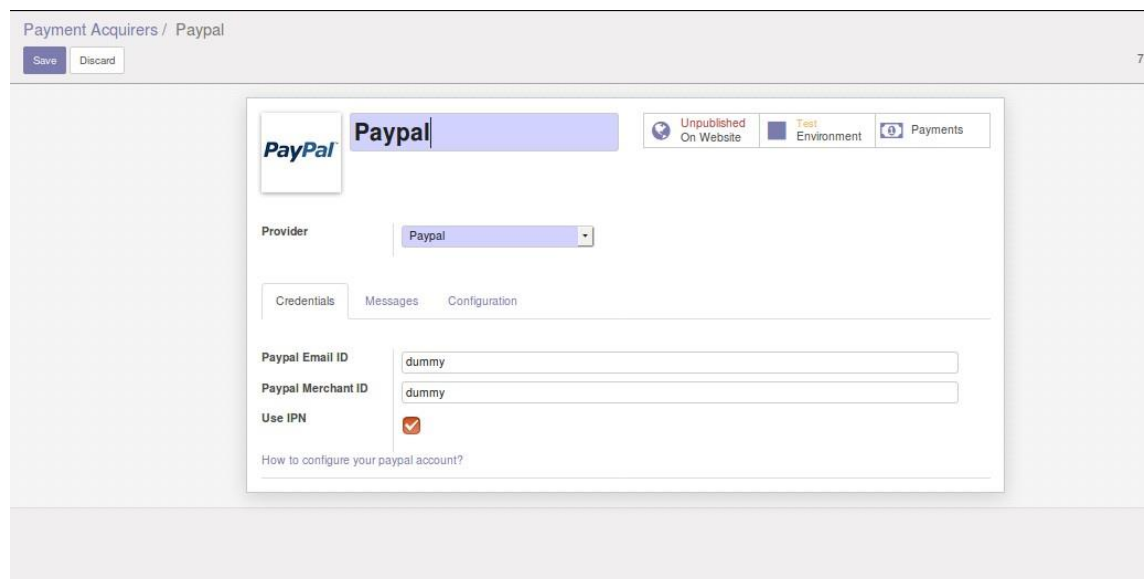
Configure Payment methods

- **Website Admin > Configuration > E-commerce-> Payment Acquires**

We can install the required payment methods from here



- Click **<Configure>**



Once you configured the settings, **Publish** the same on Web site to make it available for users

Project Management

Project Management is a collection of guiding processes to achieve a specified target. That may include initiation, planning, assignation, controlling, analysis and closing. Project management app is one of the powerful tools in Odoo. Where we can run any type of projects with user-defined workflow. To enable project management functionalities in Odoo, you first need to install Odoo Project App.

With Odoo project management module you can define your project, add tasks in it, assign tasks to employees, manage employee timesheet and track issues associated with the project effectively. The module also provides an option to enable portal view, through which your client can track the progress of the project. Just like in all other modules, the reports generated by BI engine gives an insight to all your projects.

Some of the features [19] of the Odoo project management module is

- **Clean and fast**

- Modern User Interface***

- A fast user interface designed for modern project management. Get all the information you need where you need it.

- Mobile***

- Mobile-friendly. Track projects and tasks easily on the move. Stay connected, always.

- Filters and Groups***

- Search tasks or issues easily with the smart filters. Analyze data with multi-level grouping.

- Fully customizable***

- Customize the process of every project, rename stages and alerts according to your own activities, automate emails, etc.

- **Tasks**

- Customized Kanban View***

- Drag & drop tasks easily with the 'Kanban' view. Group tasks by stages, responsible, deadline, etc. Change name of "task/issues". Change the meaning of the green/red status. Create specific stages per project. Define the process through custom tool-tips for each stage. Create tasks from sales orders.

- Calendar of Deadlines***

- Use the calendar view on tasks to highlight project deadlines. Simply drag & drop tasks in the calendar to reschedule.

Multi-projects

Work on single or multiple projects at the same time. Perform multi-project analysis and searches.

Document Management

Manage documents related to tasks, issues or projects. (Specifications, plans, etc.)

Gantt Chart

Manage tasks on a timeline with the Gantt chart view. The easiest way to track deadlines and timeline progress.

Graphs

Get graph charts to analyze the progress of your tasks: by stage, by responsible, by tag, by project, etc.

Pivot Table Analysis

Use the pivot table on tasks to perform deep statistical analysis on the performance of your projects.

Time Tracking

Track expected hours, effective hours, and re-forecasts on tasks.

Archive tasks

Archive tasks done and have a clear view of the other tasks you still need to work on.

- **Issues**

Customer tickets

Use issues to track support contracts, tickets, bug reports.

Email integration

Communicate with your customers by email. Everything is automatically attached to the issue to get a full visibility.

Service Level

Link SLA-related information to issues: time to open a ticket, time to close a ticket, statistics on the volumes and performances, etc.

Automate actions

Use triggers and automated actions to send automatic emails on different statuses: confirmation of ticket, customer satisfaction survey, etc.

- **Customer Services**

Timesheets

Track time on projects and tasks using the timesheet app. Available as a Chrome plugin or a mobile app.

Customer Satisfaction

Use the customer satisfaction rating survey to get feedback from customers every time you close an issue. Configure the automatic email sent to customers after each

milestone and receive their feedback directly. Analyze overall rating by project to improve your process.

Forecasts

Forecasts projects and resources easily from the Gantt chart taking employee holidays into account. Compare forecasts with real timesheets.

Portal front-end

Customers have access to their tickets from the portal.

- **Multi-Purpose**

Internal Projects

Track internal projects with tasks and manage teams efficiently by setting clear priorities.

After Sales Services

Effortlessly manage after sales services requests and configure a customized process in the Kanban view.

Support Contracts

Automatically create issues by email, track support services and count hours on contracts.

Customer projects

Forecast project resources, track tasks and milestones, record timesheet and analyze the performance of the team. [19]

System Users:-

There are two type of users in Project Management

- **Project Manager:** - Who can create and manage projects.
- **Project User:** - Who can access the tasks assigned to him

Basic Management

Create Project

Either you can use the **Create** button in Dashboard or

- **Project -> Configuration -> Projects -> Create**

Task as field will allow you to give a custom name for your project Tasks

- Set **Project Manager**, and other privacy settings for your projects.
- **Save** and mark **Active** to make the project Available

*“Now you can see the project is listed in your **dashboard**”*

Note: - You can Update/Delete any project from the same menu i.e. **Project > Configuration > Projects**

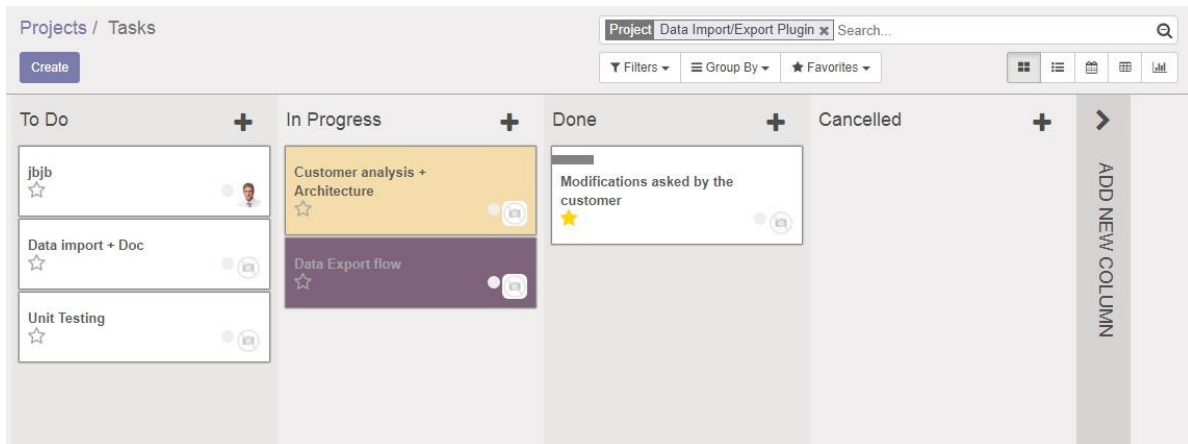
Create Task

By creating a Project you have just created the template. Now it is the time to create tasks in your Project. You can create a Task by two methods.

Method 1:

- **Project > Dashboard**

- Click the project you wish to add Task.



Listed are the different Stages of a Project.

- You can add a Task at any stage by Just clicking on the '+' button
- To view Update/Delete option click on the task

Or you can follow

- **Project > Task > Create**

Tasks / New

Save Discard

★ Task Title...

Active

Project: E-Learning Integration | Deadline: |

Assigned to: priya | Tags: |

Initially Planned Hours: 00:00 | Working Time Recorded: 0%

Description Timesheets Extra Info

Rich text editor toolbar: Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo.

- Choose the Project
- Assign the Task to user
- Once you choose the project you can add Timesheet for this task
- Mark <Active> and <Save>

Note: - You can Update / Delete any task information from the same menu i.e. **Project > Task >**

Define Project Stages

You can define different stages for your Project. To customize the stages

- **Configuration -> Stages -> Create**

- Fill the fields and **Save**

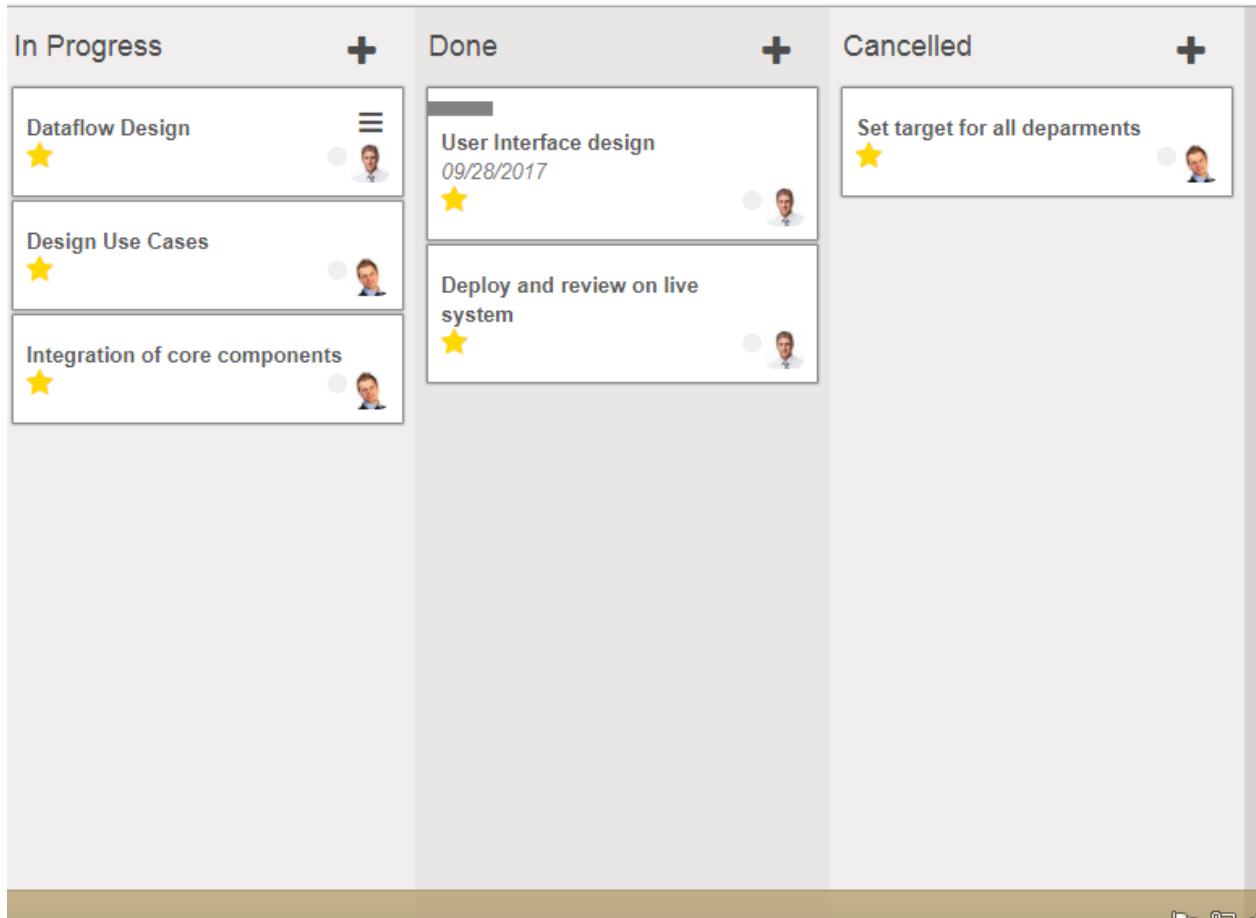
Note: - you can Update/Delete any stage from the same menu i.e. **Configuration > Stages**

Timesheet management

Timesheet management is a very important aspect in Project management. After project manager creates a project and assigns its task to different user, all such users can access project Timesheet and add their contribution to it. The same operation can be done through Timesheet Management Module of Odoo. To enable this feature you must install Timesheet App from Odoo.

To add a timesheet

- Select the project from Dashboard



- Select the task you wish to add a Timesheet
- In Task details, under Timesheet menu click **Add an Item**

Description		Timesheets	Extra Info	
Date ▲	User	Description	Duration	
09/06/2017	priya	help pr	01:00	🗑️
Add an item				

- After passing entry **Save** the Task

Note: - This entry will be automatically updated to employee's Personal timesheet, which he can view from **Timesheet -> My Timesheet**

Note: - "whenever a user Passes an entry in timesheet, the total time assigned to that task automatically reduces"

☆ Take Away Customization

Active

Project

Lillis Emporium ERP

Assigned to

Developer

Initially Planned Hours

06:00

Deadline

07/03/2017

Tags

NeedAssistance

Working Time Recorded

54%

Description

Timesheets

Extra Info

Date ▲	User	Description	Duration
09/14/2017	Administrator	Designing of Task	00:45
09/14/2017	Developer	Button action & Controllers	02:15
09/14/2017	Developer	Testing	00:15

Hours Spent :

03:15

Remaining Hours :

02:45

Issue Tracking

In project management, Issues and its tracking is a very important thing. We can enable this feature in Odoo by installing "Issue Tracking" from apps.

This *Issue Tracking* module manages issues we might face in a project like bugs and errors in a system, client complaints or material breakdowns etc. So it allows the project manager to deploy any person to work over the reported issues. **Issues should have some workflow. It will take the project's workflow automatically if we mention any project in issue form.** We can go through its fields

Create an Issue

- **Project >Search > Issue > Create**

The screenshot shows the 'Issues / New' form. At the top, there are 'Save' and 'Discard' buttons. Below them is a large text area for 'Issue Summary...'. The form is divided into two columns. The left column contains 'Assigned to' (a dropdown menu), 'Priority' (two star icons), and 'Tags' (a dropdown menu). The right column contains 'Contact' (a dropdown menu), 'Email' (a text input field), and 'Project' (a dropdown menu). Below these fields are two tabs: 'Description' (selected) and 'Extra Info'. Under the 'Description' tab is a large text area for 'Add an internal note...'.




- You can assign the issue to an employee to solve
- You may also set priority
- Fill the fields and **Save**

Note: - You can track and Update an issue progress from same menu i.e. **Project ->Search -> Issue**

The screenshot shows the 'Issues' dashboard. At the top, there is a search bar with 'My Issues' and a search icon. Below the search bar are filters: 'Filters', 'Group By', and 'Favorites'. The dashboard is organized into four columns: 'To Do', 'In Progress', 'Done', and 'Cancelled'. Each column has a plus sign icon. The 'To Do' column contains four issues: 'Problem loading page Delta PC', 'Page not Found Agrolait', 'Programming Error China Export', and 'Create new object ASUSTeK'. The 'In Progress' column contains four issues: 'Constraint Error ASUSTeK', 'Patches Error in Program Agrolait', 'Program not giving proper output ASUSTeK', and 'Include Attendance sheet in Project The Jackson Group'. The 'Done' column contains one issue: 'Improve Reports in HRMS China Export'. The 'Cancelled' column contains one issue: 'Logical Error in Program ASUSTeK'. Each issue card shows the issue title, a star rating, and a small profile icon of the assigned employee.

Report

Different Kind of Reports related to a Project as well as Issues are available under **Reports** tab.

Issues Analysis	
Measures ▾	  
	— Total
	+ September 2017
	# of Issues
— Total	17
+ Data Import/Export Plugin	1
+ E-Learning Integration	2
+ Internal - GAP Analysis	1
+ Research & Development	4
+ Website for Sales & WMS	1
+ Website Design Templates	8

Project Customer Portal:

The Customer can analyze his project related tasks, timesheets, issues and their status through customer portal in your website. For this, we have to set the project privacy as **“Visible by following customers”** in project settings. We have to install “Website Project” and “Timesheet in Website Portal” apps from Odoo to access this features. By giving your customer the portal access, he can view the progress of his project as well as can interact with your organization.

Portal Access Management:

To give a customer Portal access either you can create a user with Portal access by the Following procedure.

- **Configuration > Project > Select the Project**

Projects / Data Import/Export Plugin

Edit Create Attachment(s) Action 1 / 6

Data Import/Export Plugin

☒ Tasks as Databases
☒ Issues as Issues
☒ Allow timesheets

Settings Emails

Project Manager

Administrator

Privacy

Visible by following customers

Customer

Delta PC

0 Documents

4 Databases

0 Issues

Timesheets

Active

- Click on the customer

Actions > Portal Access Management

Portal Access Management

Portal Other Extra Rights / Portal

Select which contacts should belong to the portal in the list below. The email address of each selected contact must be valid and unique. If necessary, you can fix any contact's email address directly in the list.

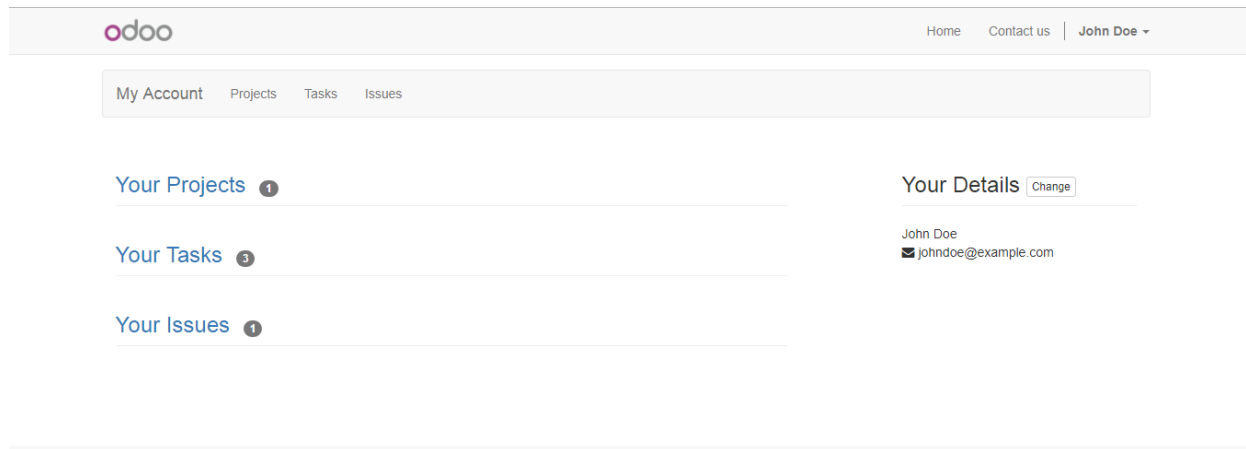
Contact	Email	In Portal
Delta PC, Charlie Bernard	charlie.bernard@wealthyandsons.example.com	<input type="checkbox"/>
Delta PC, Jessica Dupont	jessica.dupont@wealthyandsons.example.com	<input type="checkbox"/>
Delta PC, Kevin Clarke	kevin.clarke@globalsolutions.example.com	<input type="checkbox"/>
Delta PC, Morgan Rose	morgan.rose@globalsolutions.example.com	<input type="checkbox"/>
Delta PC, Richard Ellis	richard.ellis@deltapc.example.com	<input type="checkbox"/>
Delta PC, Robert Anderson	robert.anderson@chamberworks.example.com	<input type="checkbox"/>
Delta PC, Robin Smith	robin.smith@globalsolutions.example.com	<input type="checkbox"/>

This text is included in the email sent to new portal users.

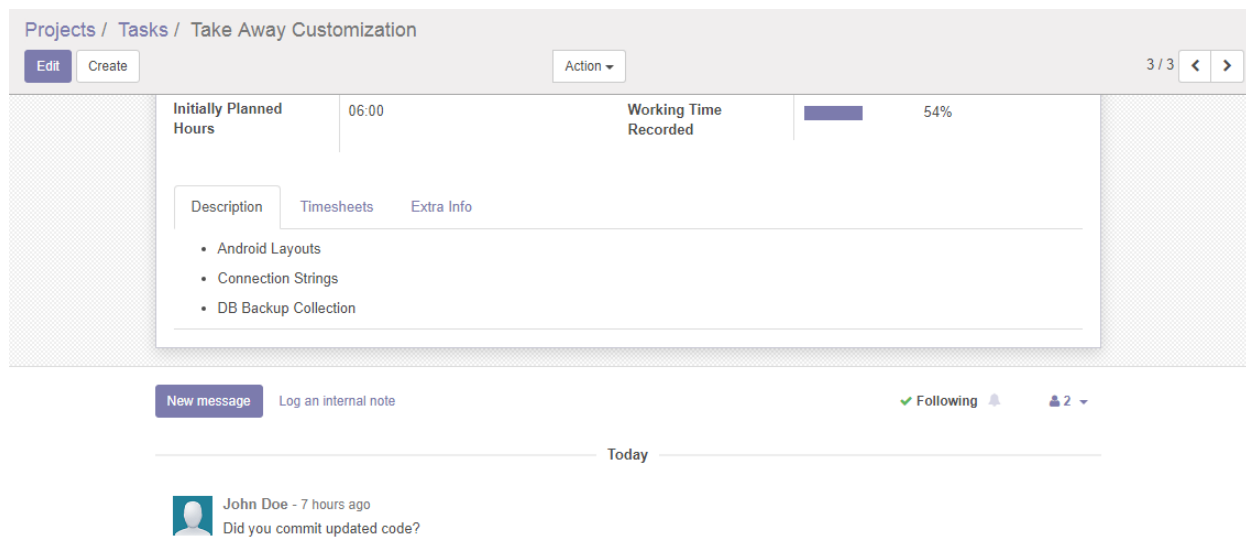
Apply Cancel

- **Click on the email** of the user (to whom we want to give access)
- Tick Portal access

An invitation mail will send automatically to the customer with Username and Password to his portal. He can login to your site and see the entire project in the website.



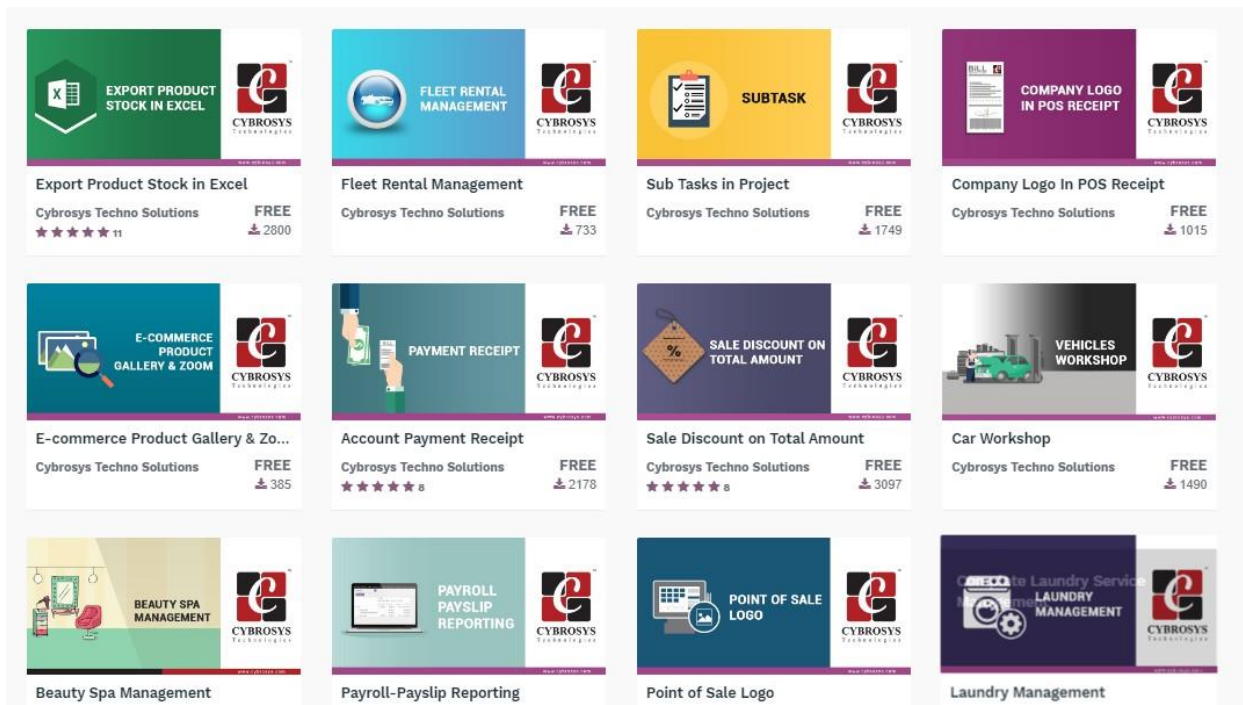
- Customer can message to project management team through his portal, and such messages will be Appended Project details



Know some of our Apps and Plugin

Cybrosys has made an immense contribution to Odoo development community by providing online community assistance through forums and community portals. But our greatest contribution is the 150+ free applications and Plugins we made available in the Odoo App store. We have made custom applications for almost all the modules. You can access these useful plugins from Odoo app store for free.

A snapshot of Cybrosys Apps



Odoo Apps by Cybrosys

A few of the Odoo Apps from Cybrosys. View more from Odoo App store

Product Stock Excel Report



EXPORT PRODUCT STOCK IN EXCEL

CYBROSYS Technologies

www.cybrosys.com



Export Product Stock in Excel
by Cybrosys Techno Solutions

★★★★★ 11

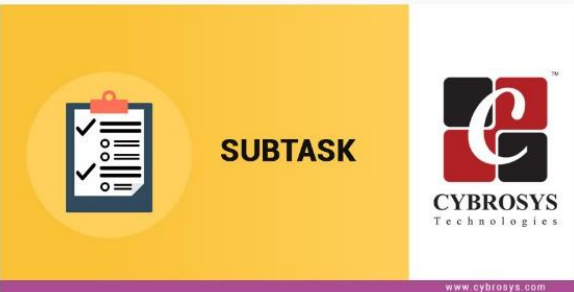
v 10.0 Third Party 2807

DOWNLOAD FOR 10.0 SERIES

Technical name	export_stockinfo_xls
License	AGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.git
Also available for	v 9.0 v 8.0
Included Dependencies	Base report xlsx

This Plugin helps you to export current stock report of all products to XL datasheet.


Sub Task



SUBTASK

CYBROSYS Technologies

www.cybrosys.com



Sub Tasks in Project
by Cybrosys Techno Solutions

v 10.0 Third Party 1750

DOWNLOAD FOR 10.0 SERIES

Technical name	project_subtask
License	LGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.git
Also available for	v 9.0

Normally in Odoo Project Management module you can add Tasks under a particular project but no sub tasks. This plugin enable following features.

- Sub-Task Lists under Task.
- Sub-Task Count in Task Kanban View.
- Sub-Task Stages in Configuration.
- Sub-Task Analysis under Report.
- Deadline Validation for Sub-Task.
- Stage Validation for Sub-Task

Discount in Sales



SALE DISCOUNT ON TOTAL AMOUNT

CYBROSYS Technologies

www.cybrosys.com



Sale Discount on Total Amount
by Cybrosys Techno Solutions

★★★★★ 8

v 10.0 Third Party 3100

DOWNLOAD FOR 10.0 SERIES

Technical name	sale_discount_total
License	LGPL-3
Repository	git@github.com:CybroOdo/CybroAddons.git
Also available for	v 9.0 v 8.0

This module allows you to mention discount on Total of sale order and Total of Customer Invoice in two ways

1. As percentage
2. As Amount

Vehicle Workshop



VEHICLES WORKSHOP

CYBROSYS Technologies

www.cybrosys.com



Car Workshop
by Cybrosys Techno Solutions

v 10.0 Third Party 1492

DOWNLOAD FOR 10.0 SERIES

Technical name	fleet_car_workshop
License	AGPL-3
Repository	git@github.com:CybroOdo/CybroAddons.git
Also available for	v 9.0 v 8.0

Car Workshop Management is an efficient app from Cybrosys to manage automobile workshop with great ease. Keep track of everything, like vehicle owner details, Works assigned, Bill details, etc. with this plugin

Some other features are as below:

- User Friendly Interface.
- Effective Time management.
- Separate Journal Configuration..
- Integrated with Accounting.
- High Scalability.

Fleet Rental Management



The screenshot displays the Odoo App Store interface for the 'Fleet Rental Management' app. On the left, there is a promotional banner with a blue background, a car icon inside a circle, and the text 'FLEET RENTAL MANAGEMENT' and 'CYBROSYS Technologies'. To the right of the banner is the app's icon, a red square with a white 'C' and the text 'CYBROSYS Technologies'. Further right, the app's details are shown: 'Fleet Rental Management' by Cybrosys Techno Solutions, version 10.0, a third-party app with 737 downloads, and a green 'DOWNLOAD FOR 10.0 SERIES' button. Below this, a table lists technical details: Technical name (fleet_rental), License (LGPL-3), Repository (git@github.com:CybroOdoo/CybroAddons.git), and Also available for (v 9.0).

Technical name	fleet_rental
License	LGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.git
Also available for	v 9.0

This App facilitate vehicle rental management features in Odoo.

Features

- Multiple Plans for Rental Contract (Days/Weeks/Months/Years).
- Integrated with Accounting Module.
- Automatically Create Recurring Invoices.
- Sending email for confirmation, first payment and recurring invoices.
- Check List Facility.
- Separate Tree view for Checklist.
- Damage Checking Facility.
- Billing Facility for Damages/Check Lists.
- Contract Payment Validations.
- Detailed Fleet Rental Analysis Report.
- Access Rights from Multiple Level.

Account Payment Receipt




The screenshot displays the Odoo App Store interface for the 'Account Payment Receipt' app. On the left, there is a promotional banner with a blue background, an illustration of a hand holding a bill, and the text 'PAYMENT RECEIPT' and 'CYBROSYS Technologies'. To the right of the banner is the app's icon, a red square with a white 'C' and the text 'CYBROSYS Technologies'. Further right, the app's details are shown: 'Account Payment Receipt' by Cybrosys Techno Solutions, version 10.0, a third-party app with 2180 downloads, and a green 'DOWNLOAD FOR 10.0 SERIES' button. Below this, a table lists technical details: Technical name (payment_receipt_invoice), License (AGPL-3), Repository (git@github.com:CybroOdoo/CybroAddons.git), and Also available for (v 9.0).

Technical name	payment_receipt_invoice
License	AGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.git
Also available for	v 9.0

With this plugin you can generate and print Receipts for your customers and vendors.

Beauty Spa Management



The screenshot displays the 'Beauty Spa Management' plugin interface and its corresponding page on the Odoo App Store. The interface on the left features a stylized illustration of a spa room with a mirror, a chair, and a table, alongside the 'BEAUTY SPA MANAGEMENT' title and the 'CYBROSYS Technologies' logo. The store page on the right shows the plugin's details, including its version (v 10.0), a 'Third Party' status, and a download button for the 10.0 series. A table below the button lists technical details:

Technical name	salon_management
License	LGPL-3
Repository	git@github.com:CybroOdo/CybroAddons.gi...
Also available for	v 9.0

- Main features
- Online Booking Facility
- Accounting Facility
- Customer Notification through Mail
- User Interactive Dashboard
- Customer can view the Available chairs and order details
- Different access levels for Users and Administrator
- Track the chair user by date

Life Line for Task



The screenshot displays the 'Life Line for Task' plugin interface and its corresponding page on the Odoo App Store. The interface on the left features a dark background with a horizontal bar chart showing progress levels (91%, 72%, 40%, 10%) and the 'LIFE LINE FOR TASK' title, along with the 'CYBROSYS Technologies' logo. The store page on the right shows the plugin's details, including its version (v 10.0), a 'Third Party' status, and a download button for the 10.0 series. A table below the button lists technical details:

Technical name	project_lifeline
License	LGPL-3
Repository	git@github.com:CybroOdo/CybroAddons.gi...
Also available for	v 9.0

You can create Life Line Bar for the task with this Plugin.

- User Defined Progress Bar Color Configuration.
- Task Lifeline Bar based on Deadline.
- Automatic Color Change of Lifeline Bar.
- Default Color for Forbidden.

Reminders



The image displays the 'Reminders' module interface and its details. The interface features a teal background with a magnifying glass over a calendar icon and the word 'REMINDERS' in white. The Cybrosys Technologies logo and website URL are at the bottom. The details panel on the right shows the module name 'Reminders' by Cybrosys Techno Solutions, a 3-star rating, version 9.0, and a download button for the 9.0 series. It also lists the technical name 'general_reminders', the license 'LGPL-3', and the repository 'git@github.com:CybroOdoor/CybroAddons.git'.

Technical name	general_reminders
License	LGPL-3
Repository	git@github.com:CybroOdoor/CybroAddons.git

Reminders helps you to attach important dates and Tasks to any of your module.

Automatic Developer Mode



The image displays the 'Automatic Developer Mode' module interface and its details. The interface features a blue background with an illustration of a person at a laptop and the text 'AUTOMATIC DEVELOPER MODE'. The Cybrosys Technologies logo and website URL are at the bottom. The details panel on the right shows the module name 'Automatic Developer Mode' by Cybrosys Techno Solutions, a 7-star rating, version 10.0, and a download button for the 10.0 series. It also lists the technical name 'developer_mode', the license 'AGPL-3', the repository 'git@github.com:CybroOdoor/CybroAddons.git', and that it is also available for versions 9.0 and 8.0.

Technical name	developer_mode
License	AGPL-3
Repository	git@github.com:CybroOdoor/CybroAddons.git
Also available for	v 9.0 v 8.0

This module makes you free from activating developer mode operations repeatedly. When you login, it will trigger the DEVELOPER MODE automatically.

- Automatically Trigger Developer Mode.
- Showing Running DB on Left Top.
- Update modules easily

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