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Technologies

odoo

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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.

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 coveys 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 you 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

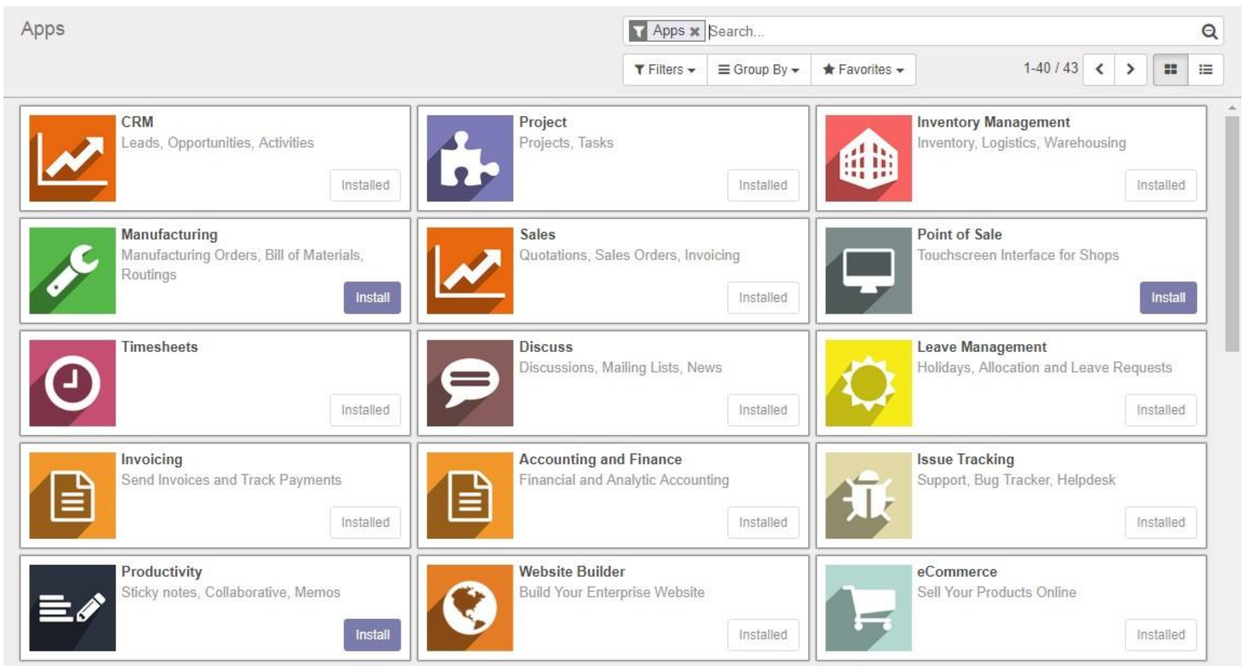
Create Database

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.

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**

Backup and Restore Database

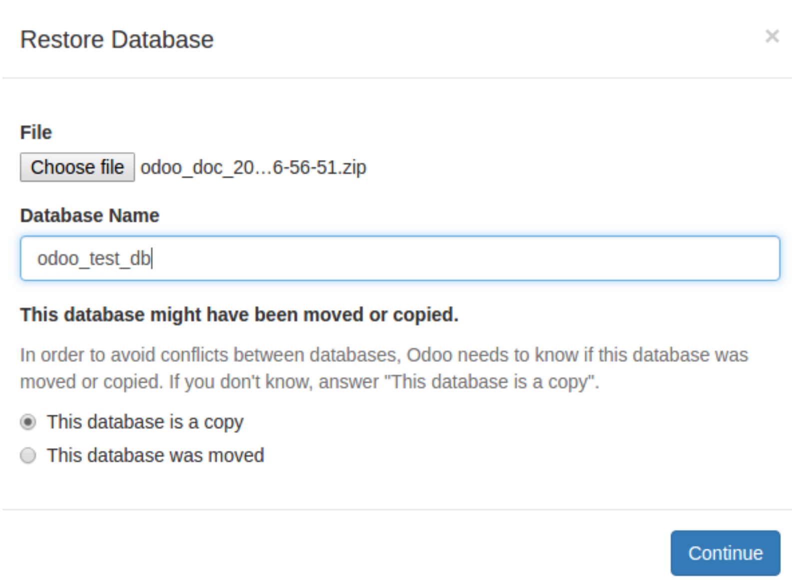
To Backup a Database

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

To Restore a Backup, Follow the steps

- **Manage Database -> Restore**

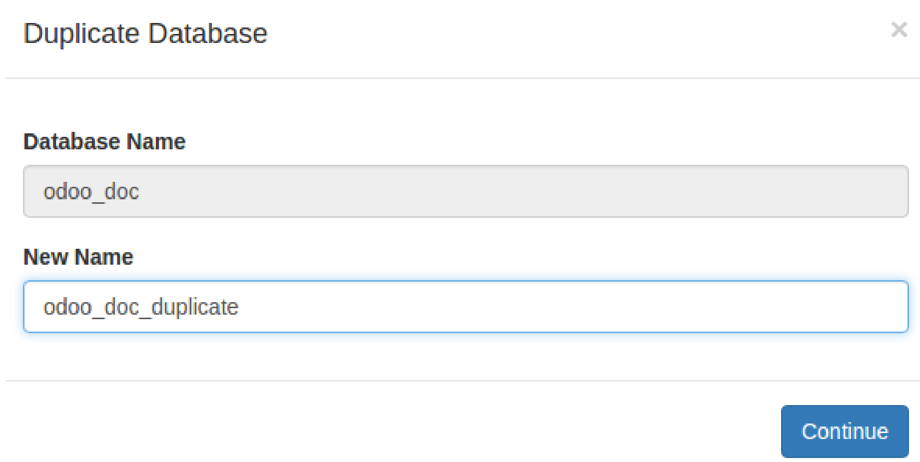
Choose the database to be restored, Give the database a new name and click on <**continue**.>



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

Duplicate Database

- **Manage Database -> Duplicate**



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.

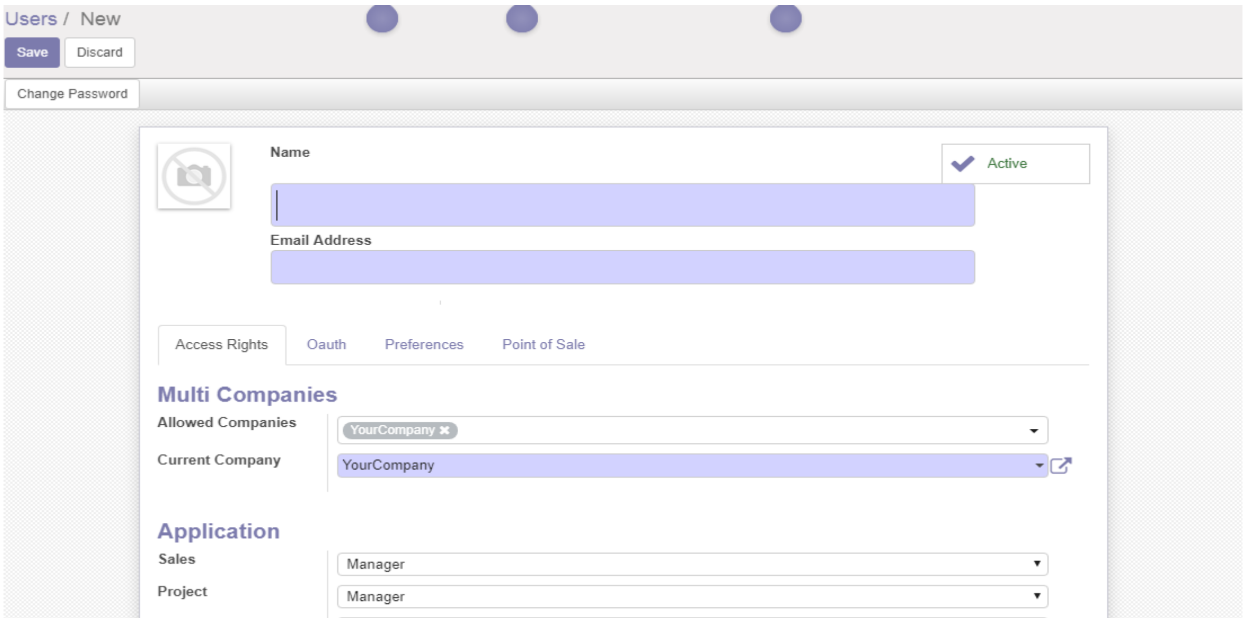
USER Management

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**



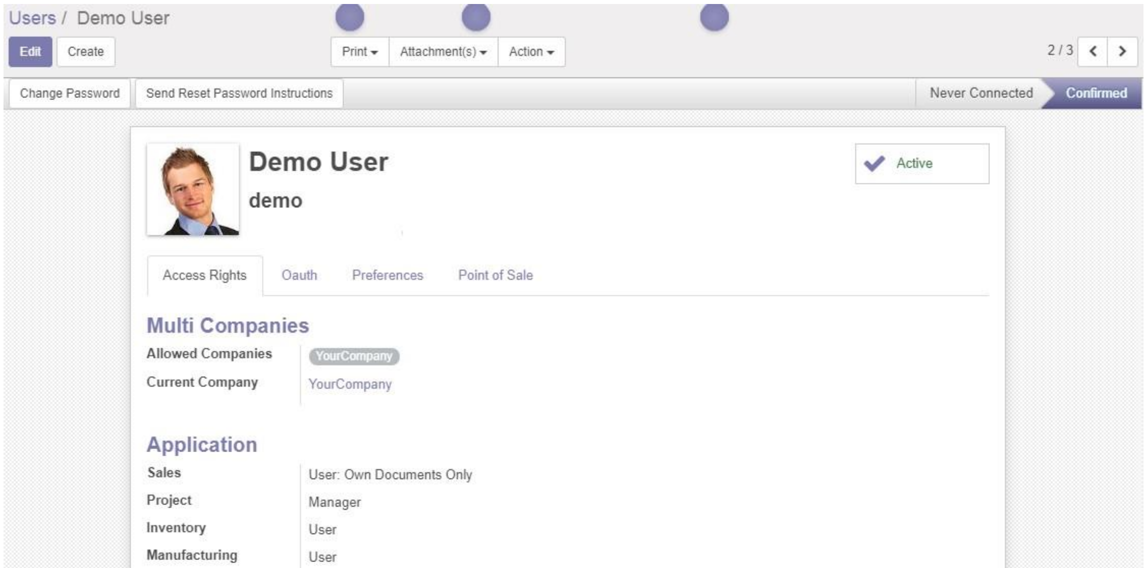
- Fill the field with user information
- Set **Access Rights** to each application for the user from dropdown
- Find more customization for the user in ‘Oauth’, ‘Preferences’, ‘Point of sale’ tabs.
- ‘**Change Password’** button can be used to set a password for the user

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**

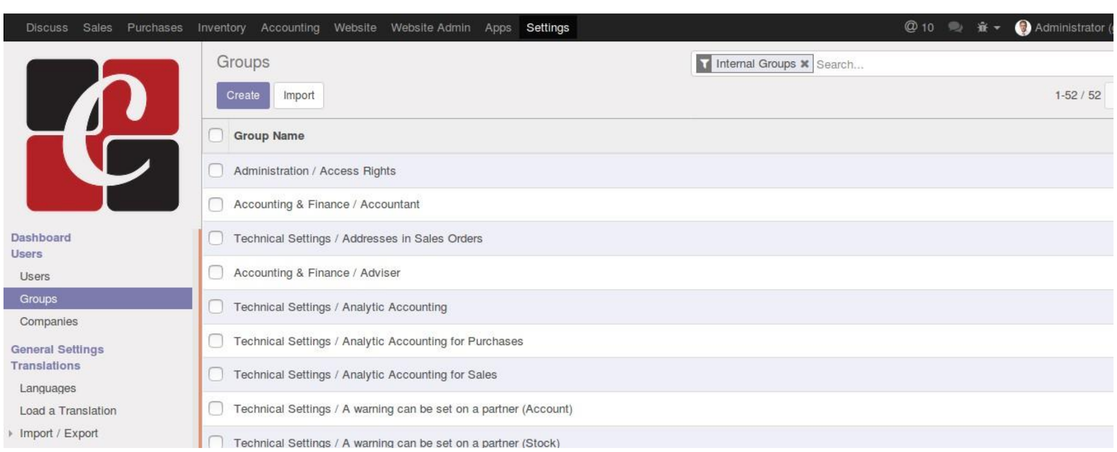
Note: - *Admin can perform other tasks like 'Edit user info', 'Duplicate' user etc. from the same window.*

Groups

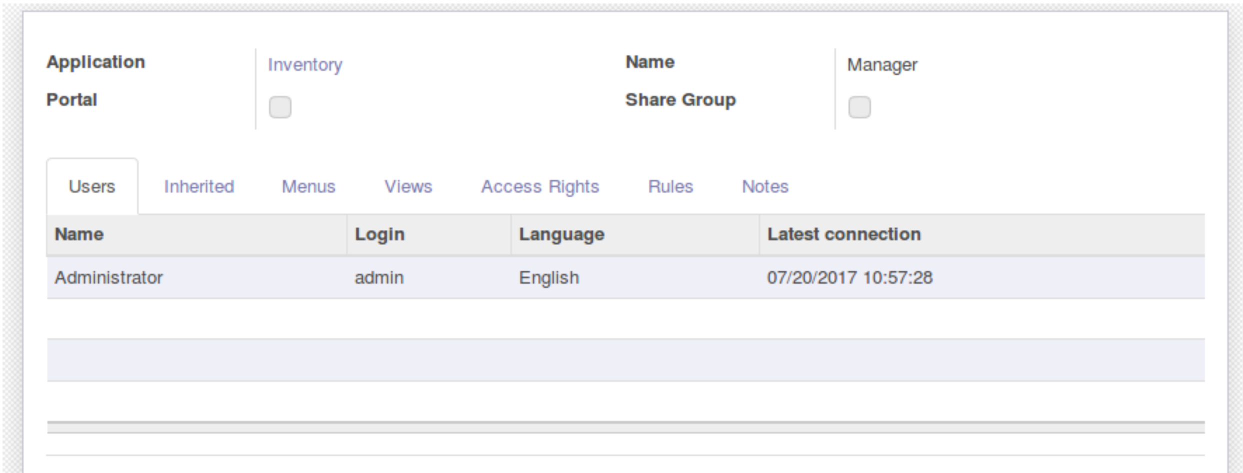
Groups are very important security modules in Odoo. They are created to achieve **organizational hierarchy as well as impost access control to a group of users**. Admin can set access control for a group of people rather than an individual.

Assign user to groups

- **Settings > Groups**



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

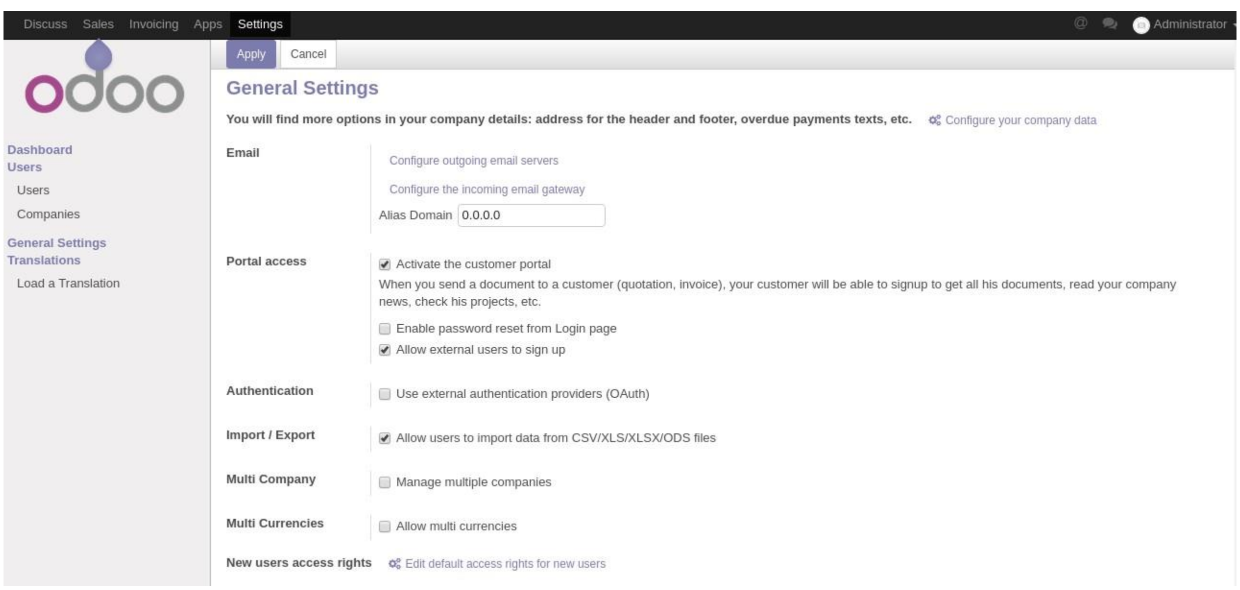


Here you can add as many as users under the Users tab so that all the security rules in that group will be applied to the user. **Access Rights** and Rules **are** very effective methods to implement security measures in Odoo, they are discussed in coming pages**.**

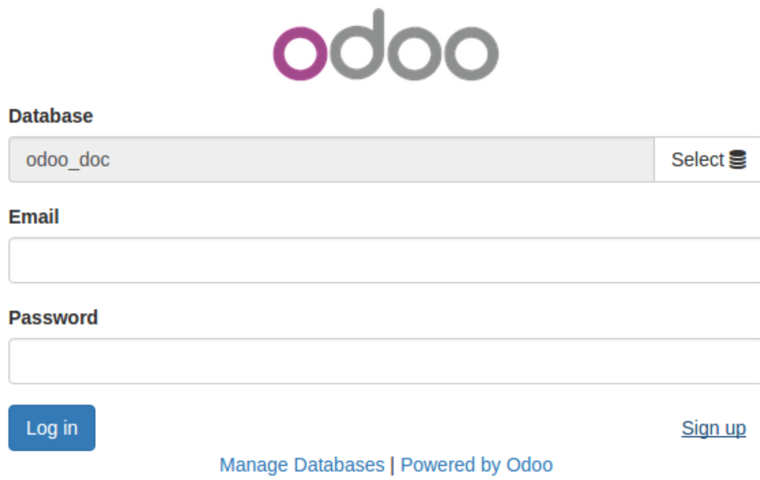
External user Sign Up

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.

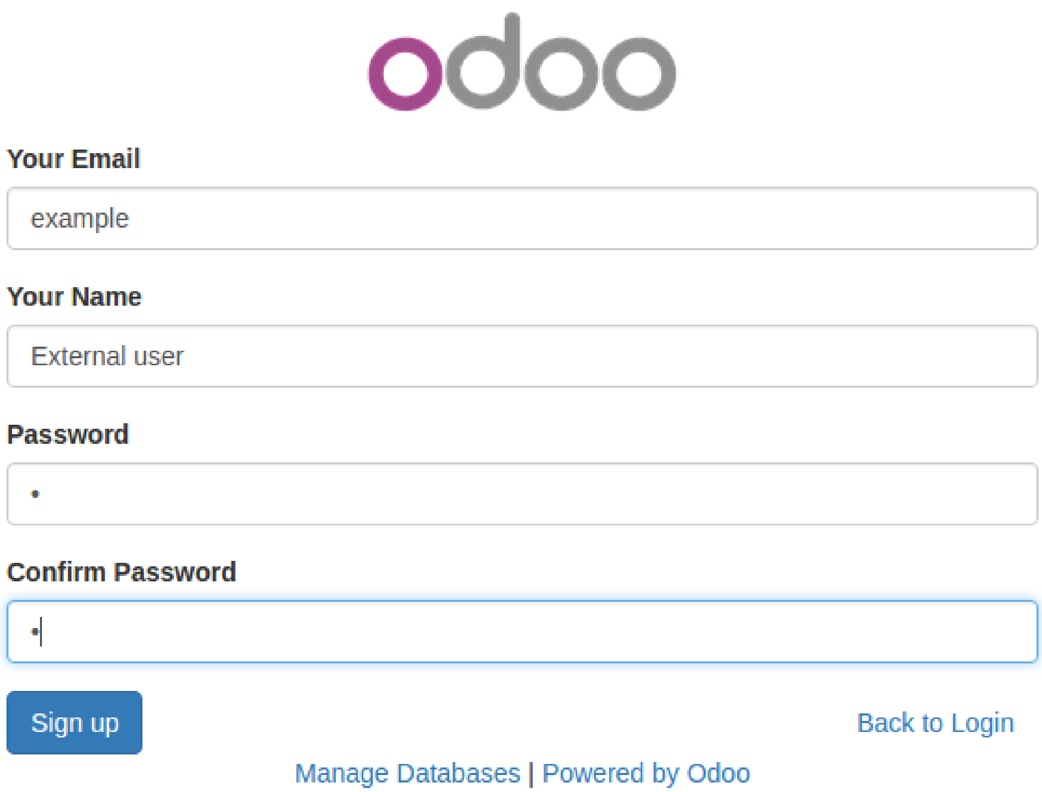
- ***Settings -> General Settings***



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



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



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**

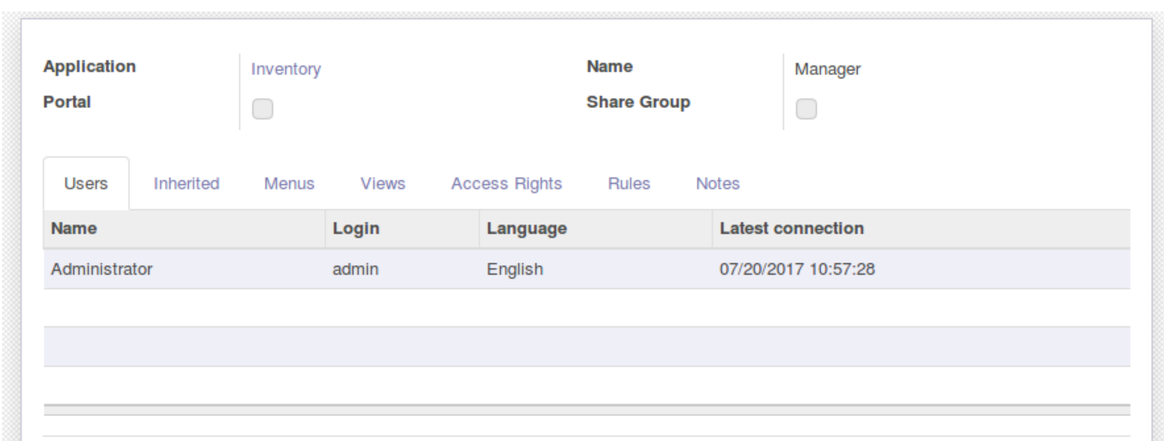
   If this is set, it means that all users that are in this group have create access on this model.

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**



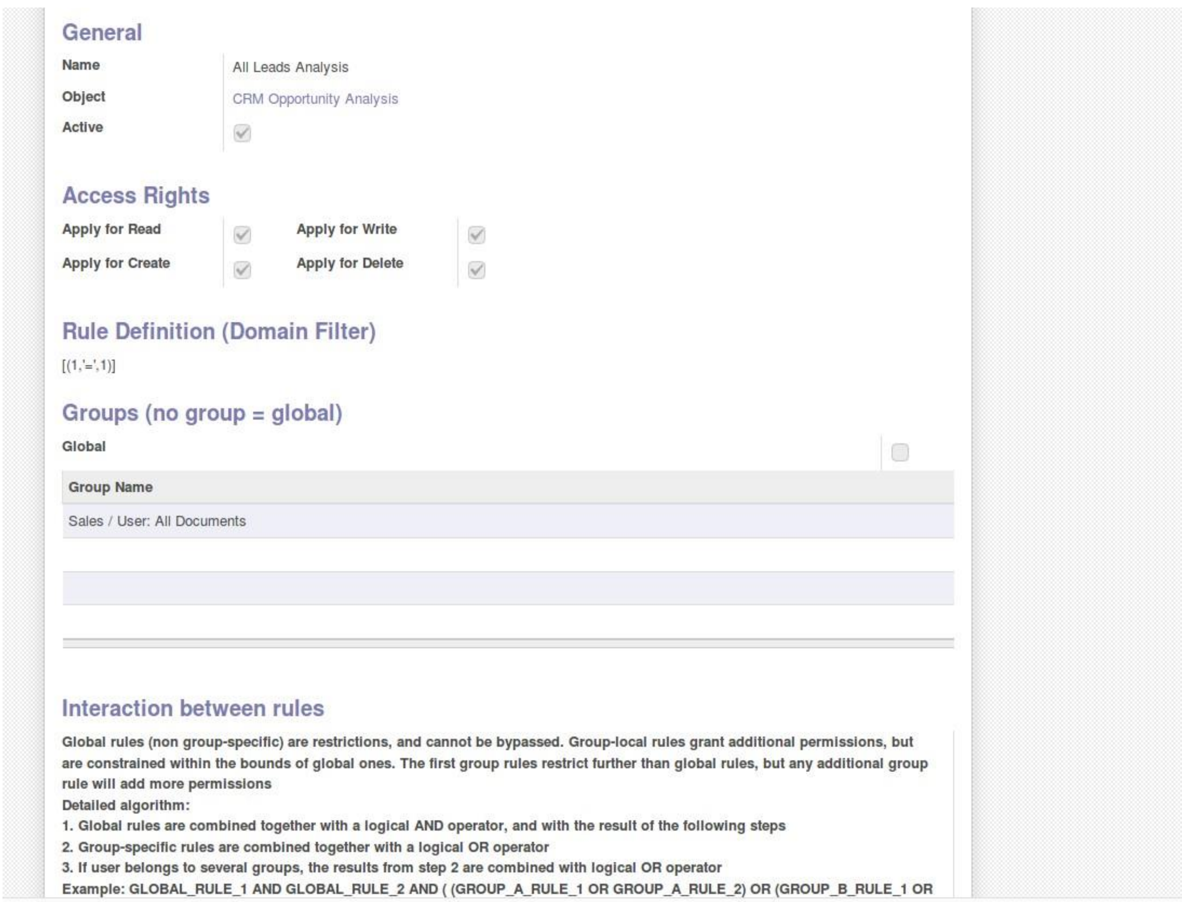
Record Rules

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)



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

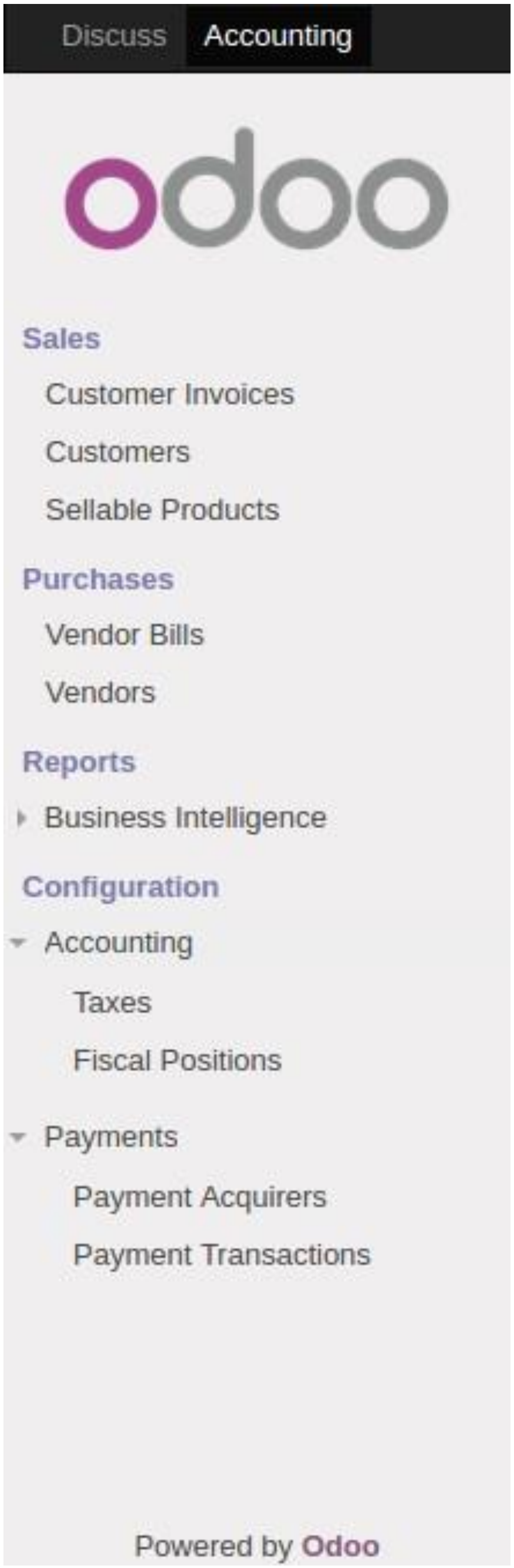
Basically, there are three types of users in Accounting module, who have different type of access right to the system.

- 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, Accounts 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.

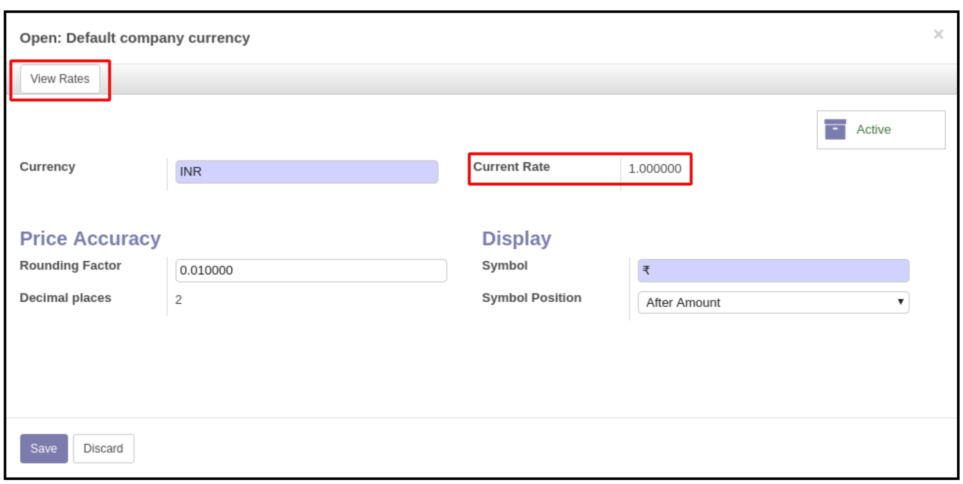
Accounting>Configuration>Settings-> Accounting and Finance

This section is very important.

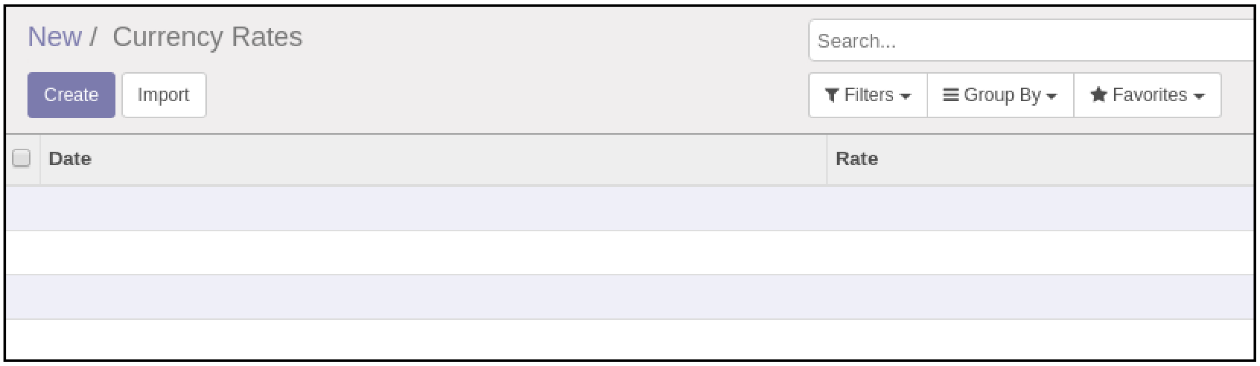
This is where we are configuring what are the features we need in our Odoo accounting system.

First thing is **Default Company Currency.**

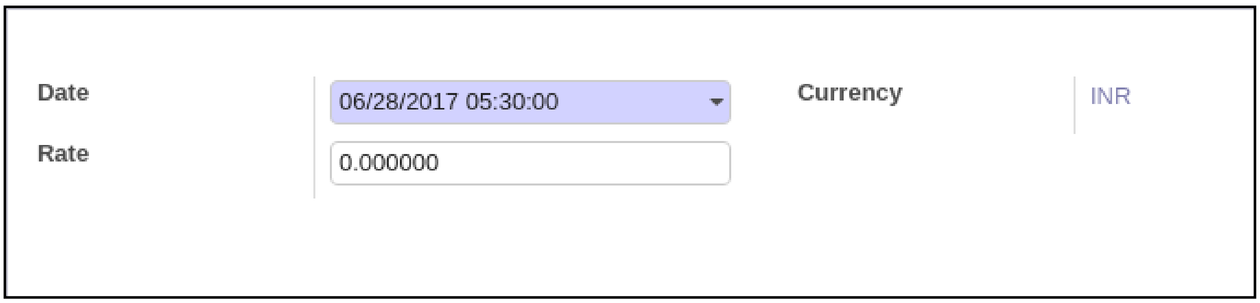
- You can change the currency rate by clicking this button. It will open a window like this



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



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

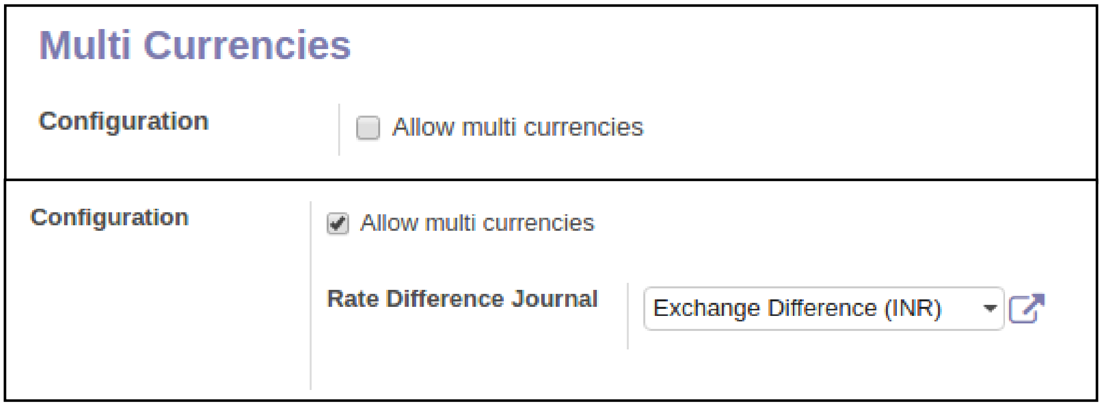


Note: *All the options those are labeled* Enterprise *as are available only in enterprise version of Odoo. We will not discuss those things here.*

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.

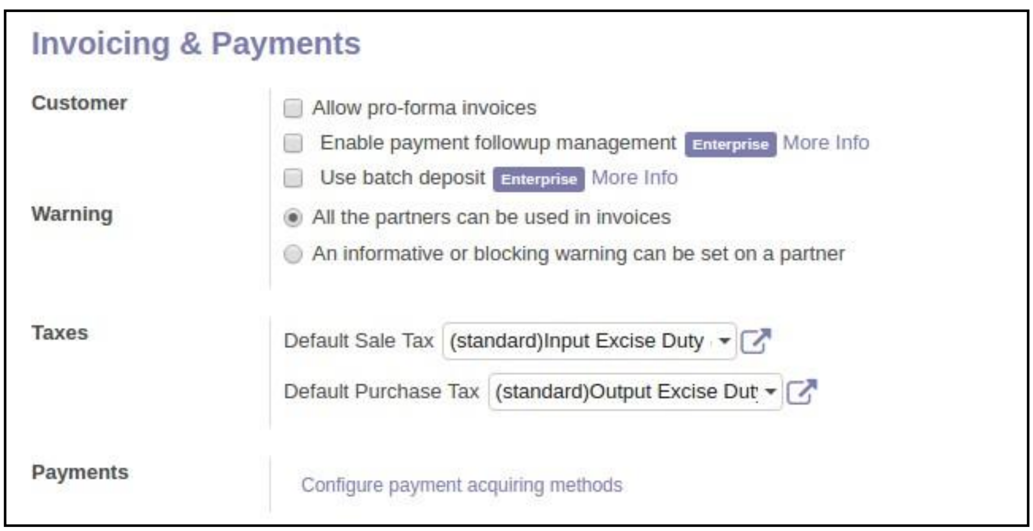
Accounting>Configuration>Settings>Multi Currencies



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

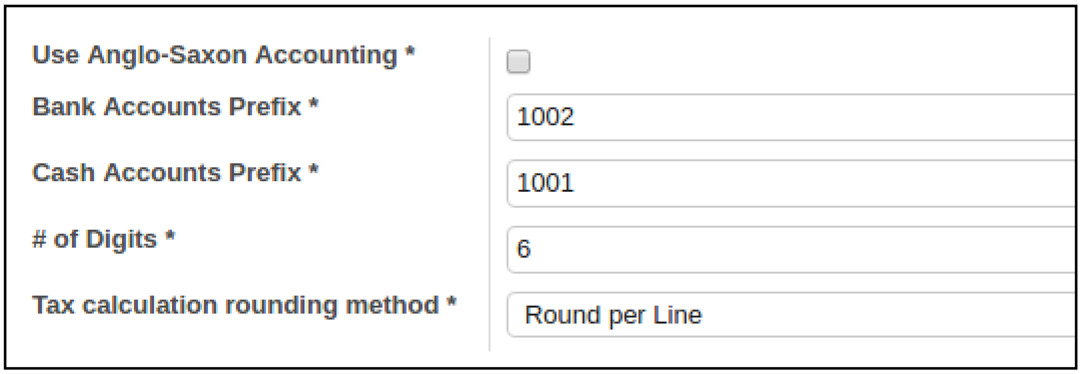


Under this section, if you check **Allow pro-forma** invoices, it will let you set your invoices into a state called '*Pro-forma'.*

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.



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**

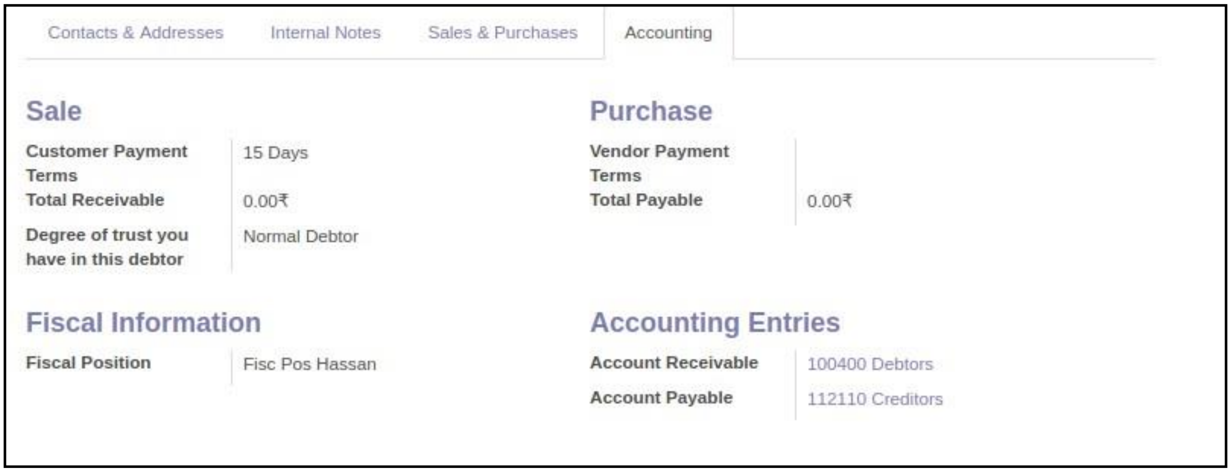
- Round per Line
  Tax amount will be rounded in each invoice line.
- Round Globally
  Rounding occurs only on total tax amount.

Overdue payments 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.



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.

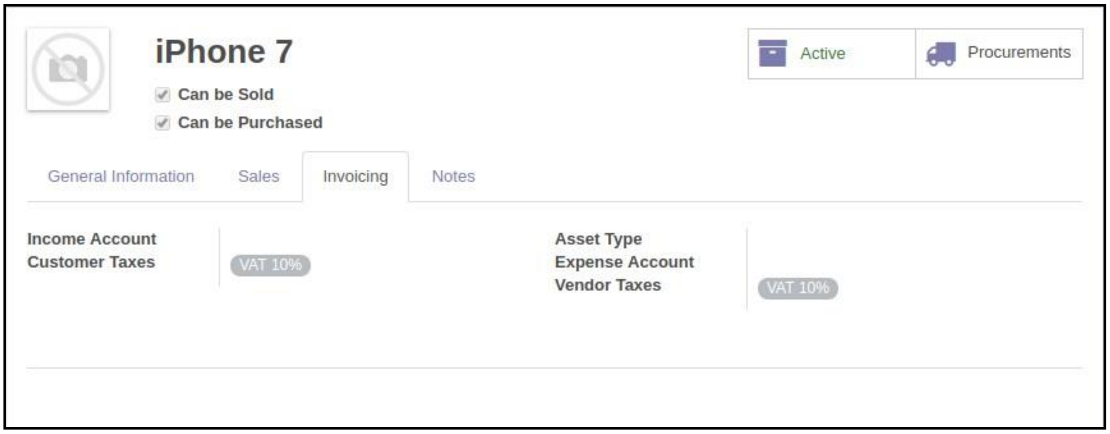
We can select the **Degree of trust you have** with this partner and also **Fiscal Position**.

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

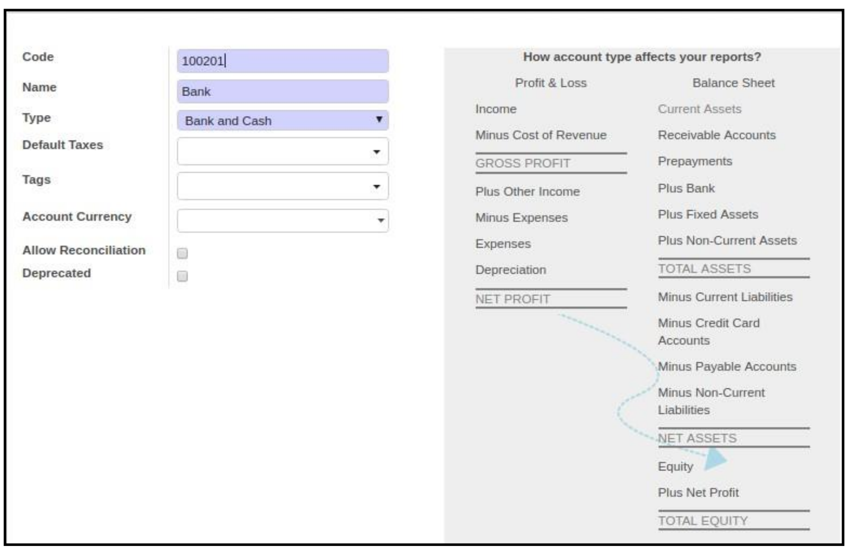
- Income Account
- Expense Account
- Customer Taxes
- Vendor Taxes



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.

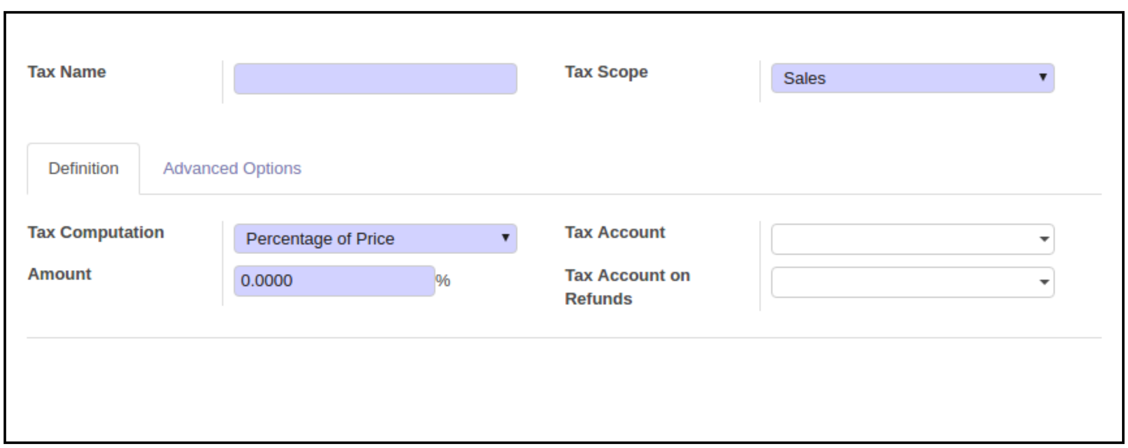
- We have to check the **Allow reconciliation** option. This account is used for Invoice and payment matching and reconciliation.
- If we mark an account as **Deprecated**, we cannot use that account anymore. We will get a warning message like this.

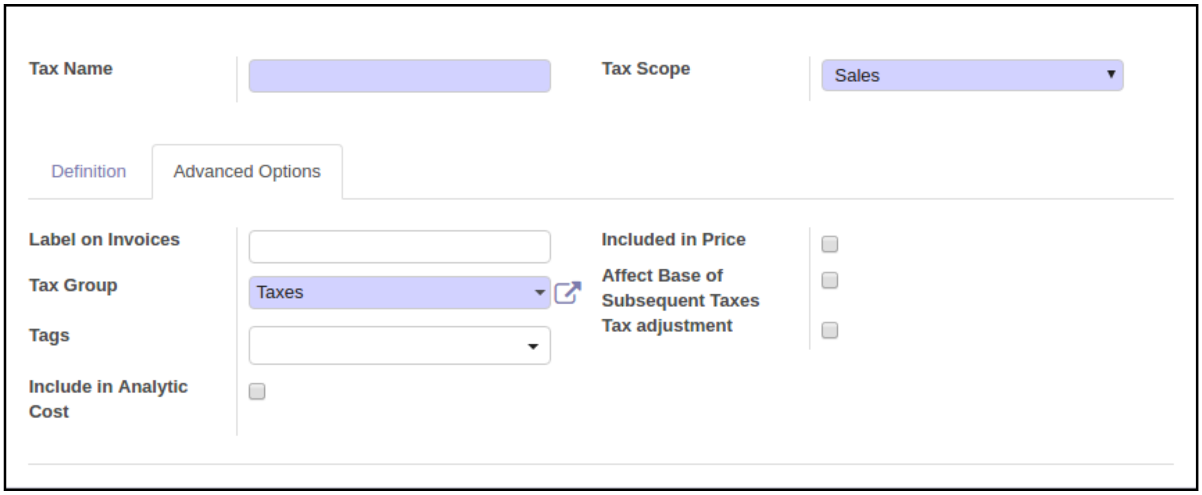
If you select an **Account Currency**, the system will force all moves for this account must have same currency.

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





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**

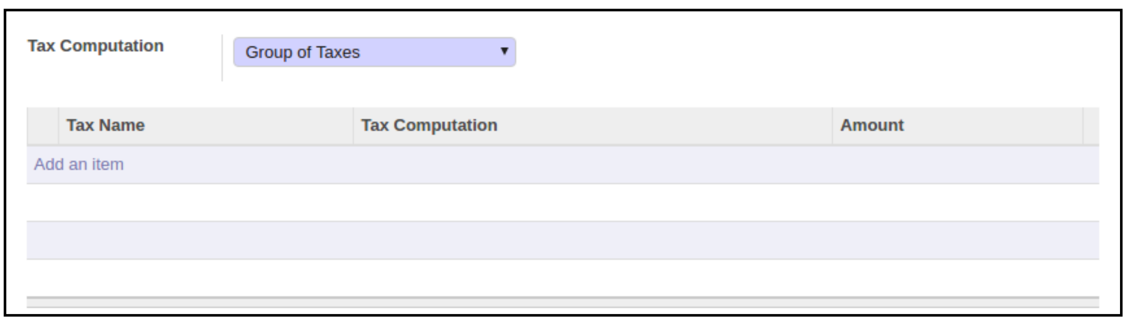
  If you set this option, Base amount of subsequent taxes will be sum of current base amount and tax amount of this tax.

- **Tax adjustment**

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

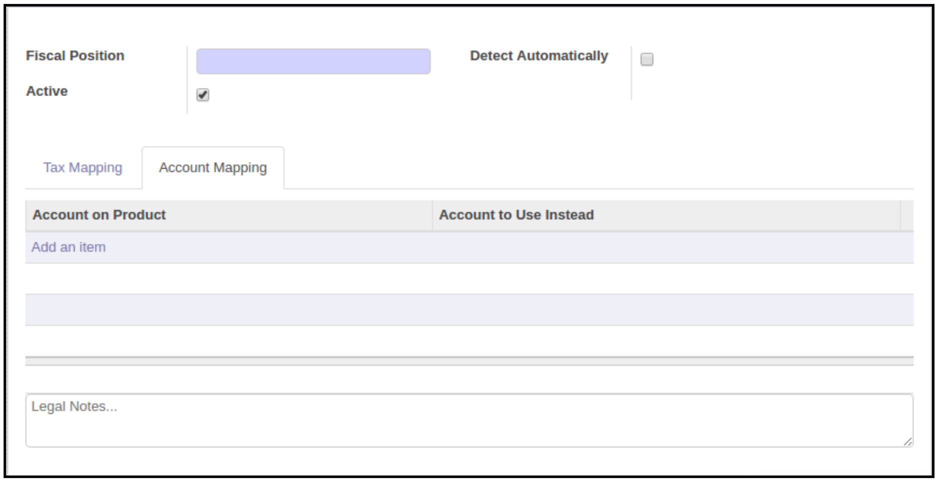
- **Group of taxes**

  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.



Configure Fiscal Positions

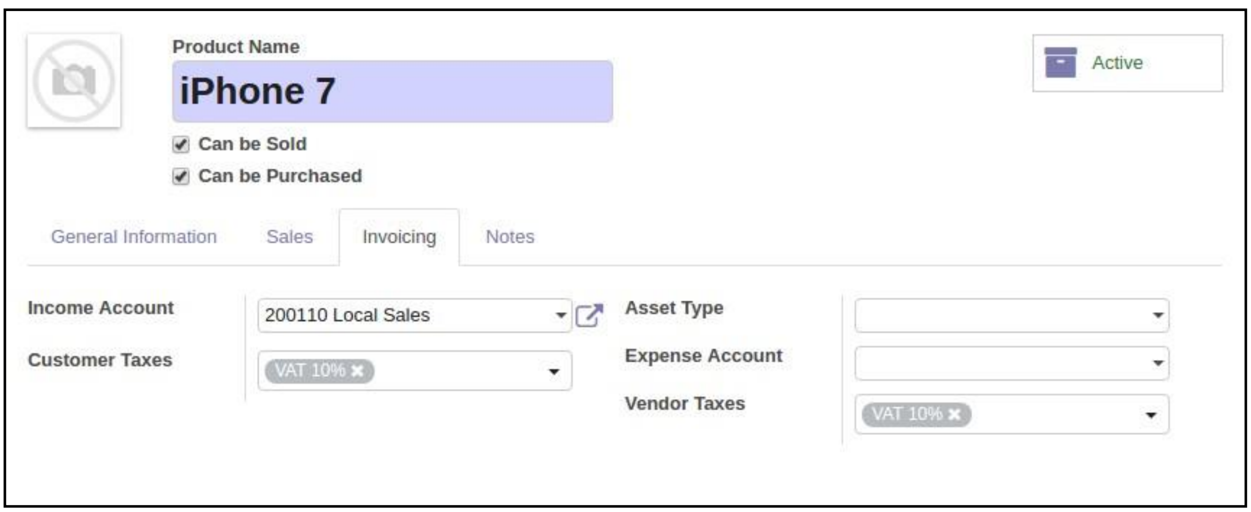
Odoo can handle Multi Company and multi-currency concepts. Those who are dealing with us, i.e. Customers and Suppliers, may be operating from another country or states. So the laws and regulations will be different for them. Fiscal position comes in handy in this case. **We can map taxes and accounts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



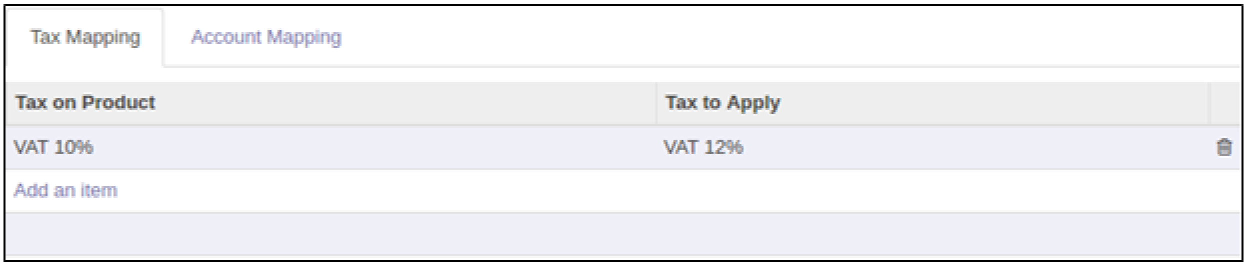
Accounting > Configuration > Accounting > Fiscal Position

Tax mapping is another useful option to configure taxes.

For example:

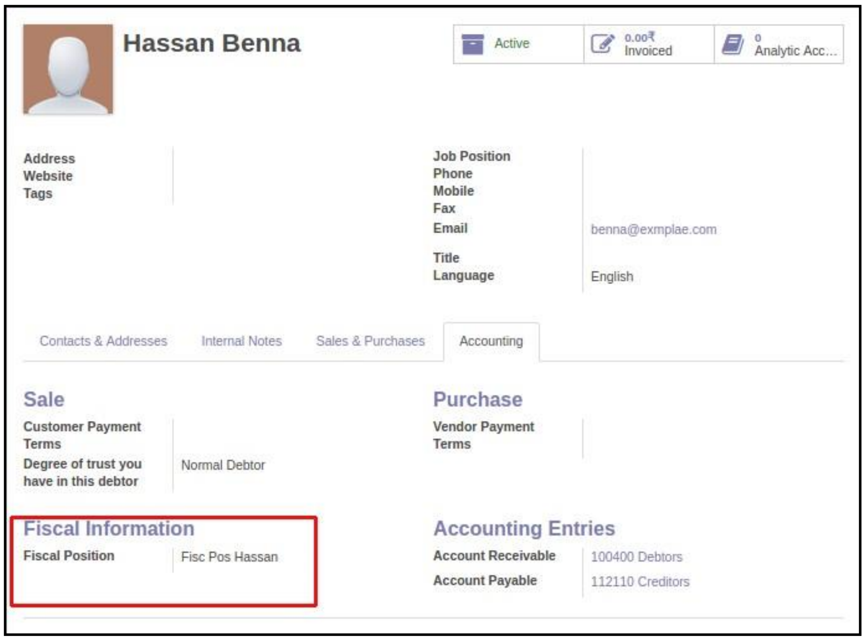


Here this product's vendor tax is configured as VAT 10%. What if I cannot purchase this product from some vendors with this tax rate (assume the tax rate is more than 10%, let's take it as 12%). In this case we can use tax mapping of fiscal position

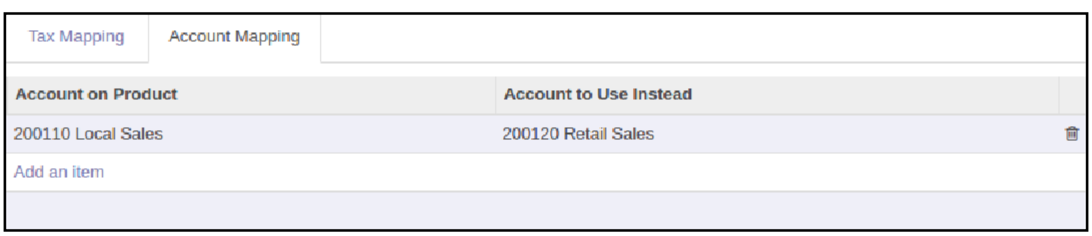


Tax on Product	Tax to Apply
VAT 10%	VAT 12%
Add an item	

Let’s specify this fiscal position on partner master.



- Same we can do with accounts.

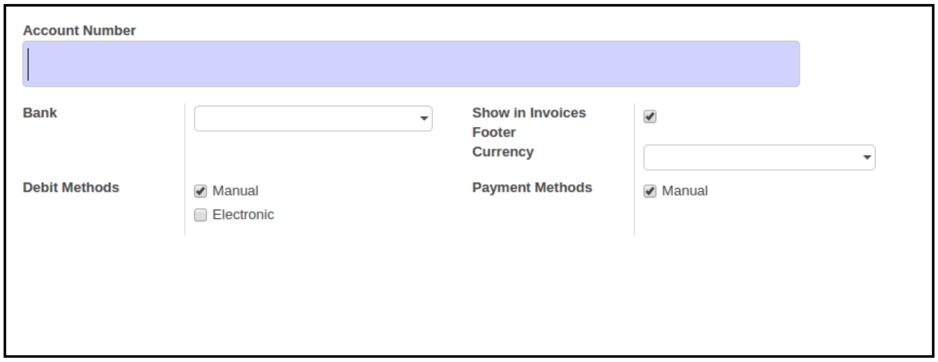


Account on Product	Account to Use Instead
200110 Local Sales	200120 Retail Sales
Add an item	

Configure Bank Accounts

Accounting > Configuration > Accounting > Bank Accounts.

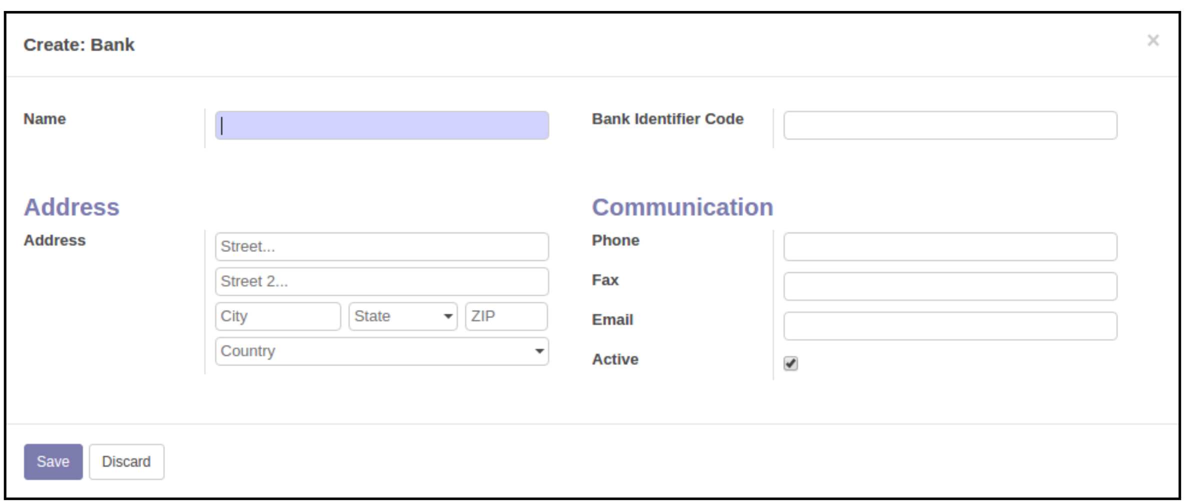
Here you can see the list of all the bank accounts configured in this system. To configure a new one click on the <**Create**> button. It will open a form to fill the details needed.



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

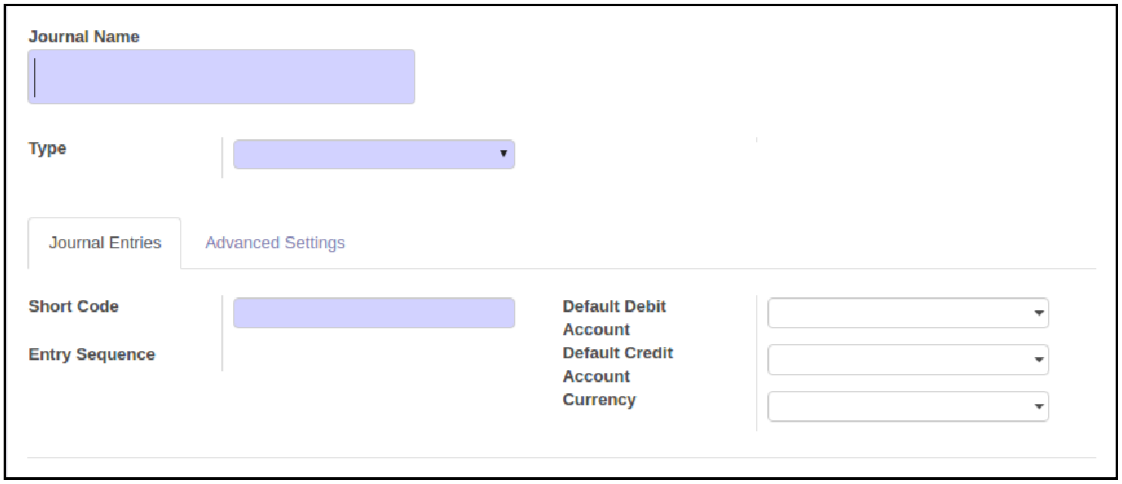
Debit method is the method of collecting money and Payment method is the method for sending money
Different modules provides different methods, select according to the need.

Create/Select the bank from list of banks



Configure Journals

Accounting > Configuration > Accounting > Journals.



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**:

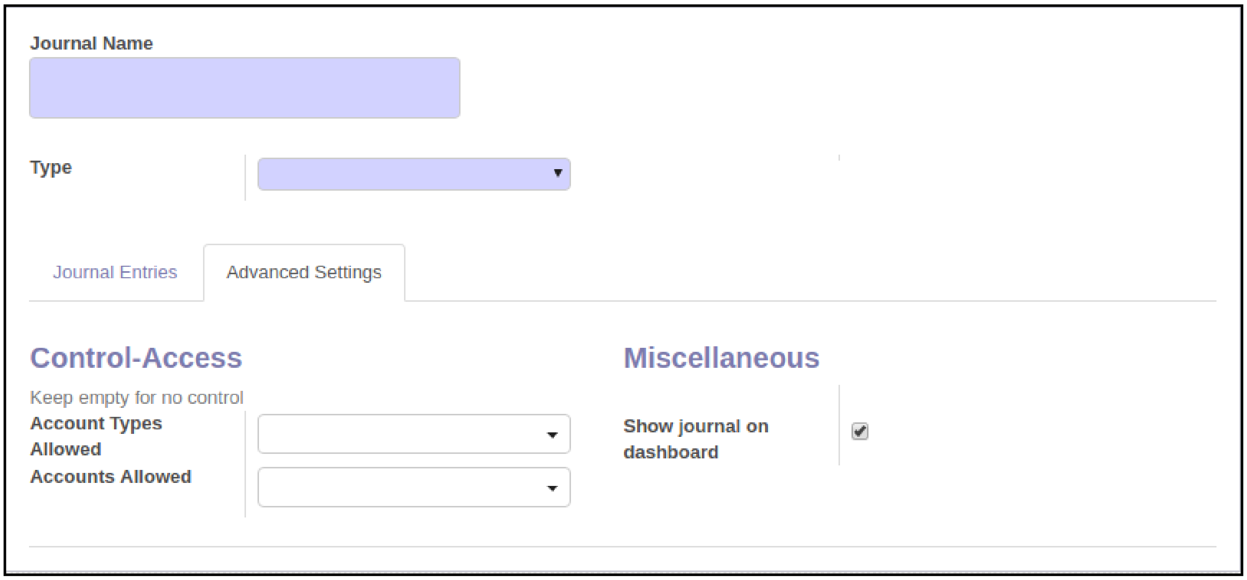
  It is the default account for debit amount.

- **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’**



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

- **Account Types Allowed:**

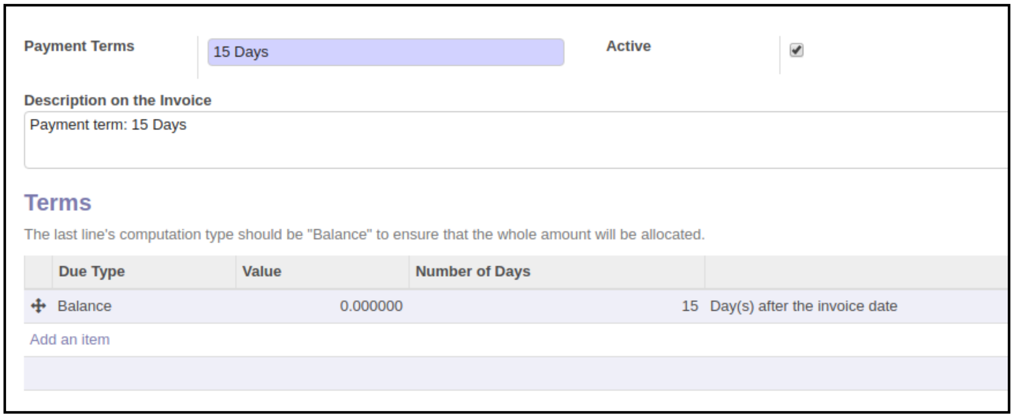
  If we mention any accounts here, this journal can only create entries to that type of accounts
- **Accounts Allowed:**

  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 term have different due types.

- Balance
- Percentage
- Fixed amount

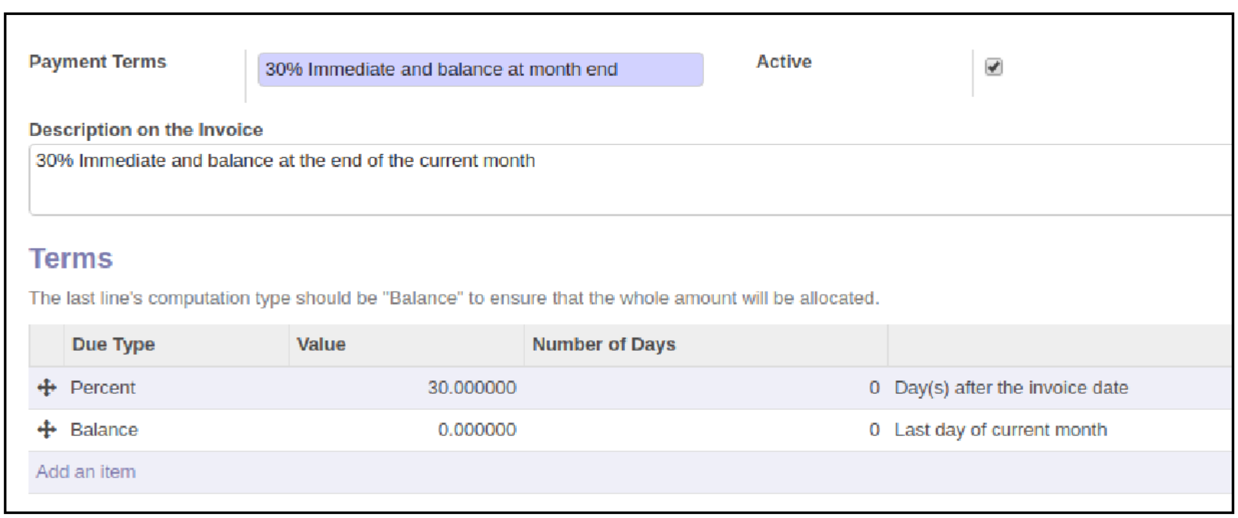
Also different due date computation parameters

- 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

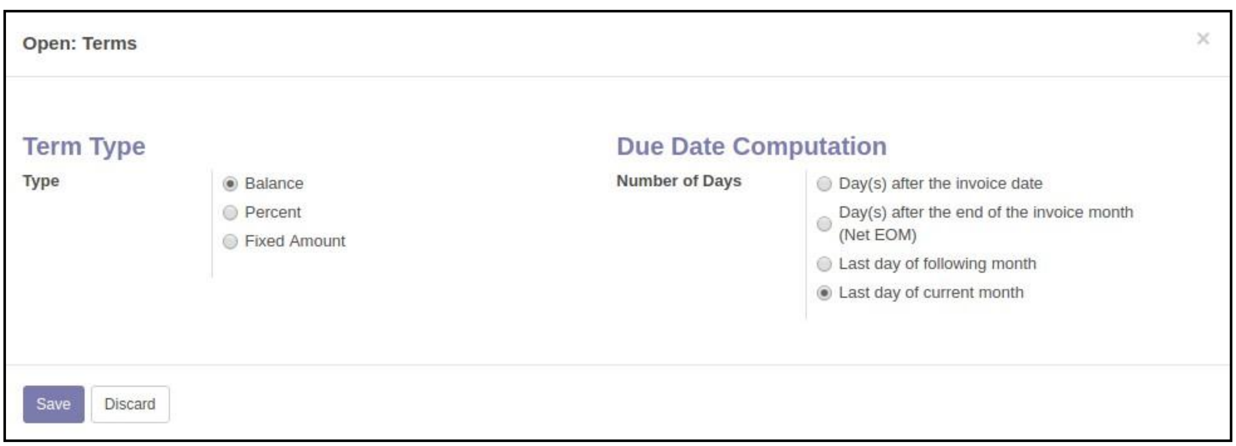


As you can see in the above picture, we have added 'Percentage' and 'Balance' lines under terms.

In percentage,

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

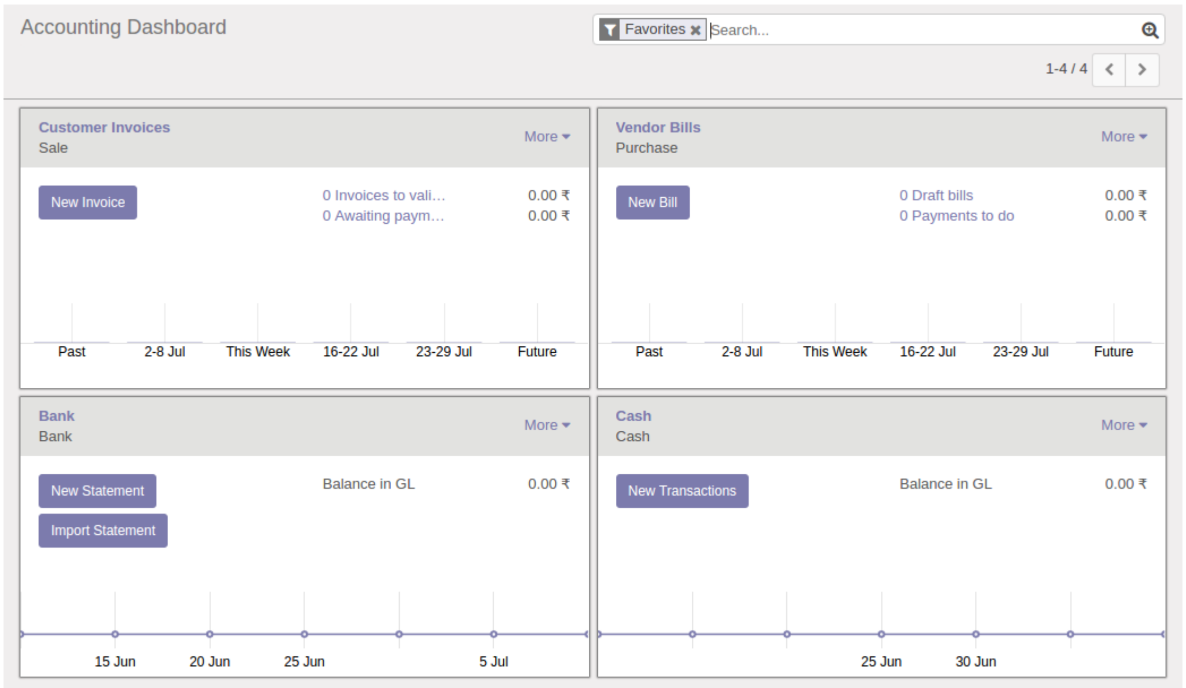
In balance,
We choose the 'Last day of current month’.



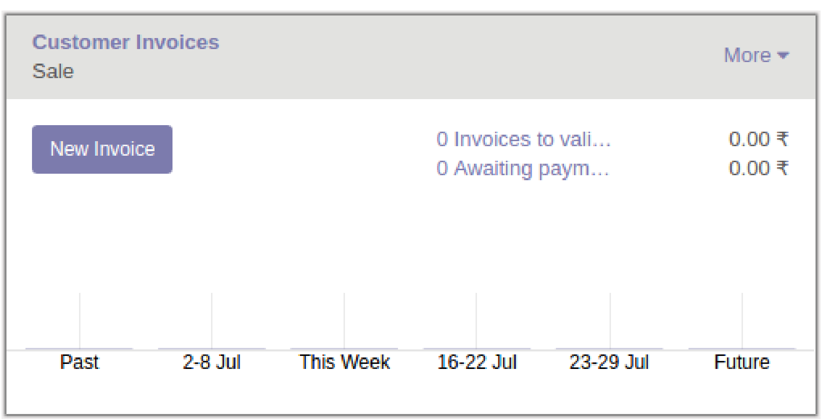
Accounting Dashboard

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

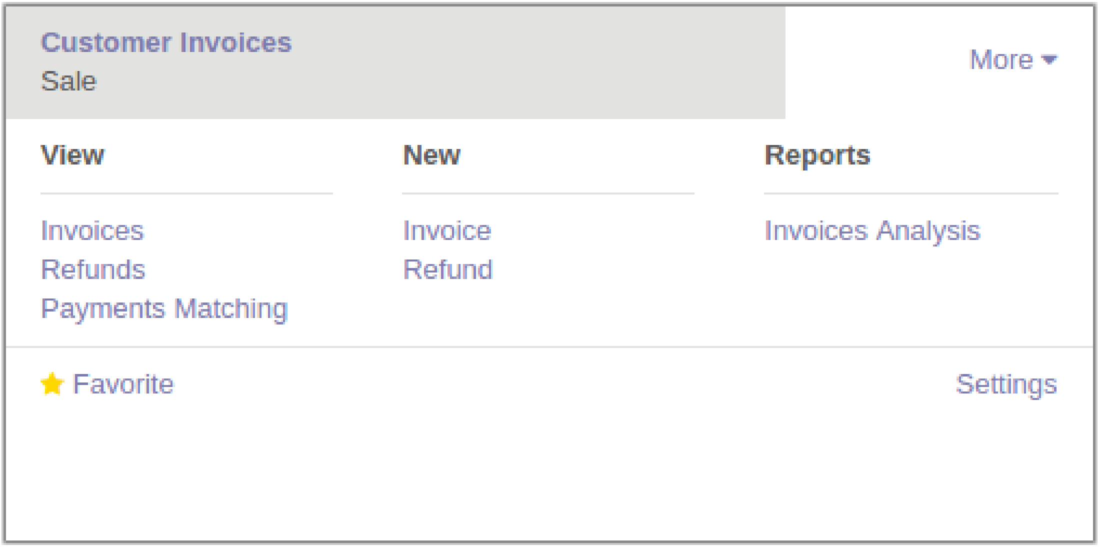
You can also go to many other parts of your accounting app from this dashboard.



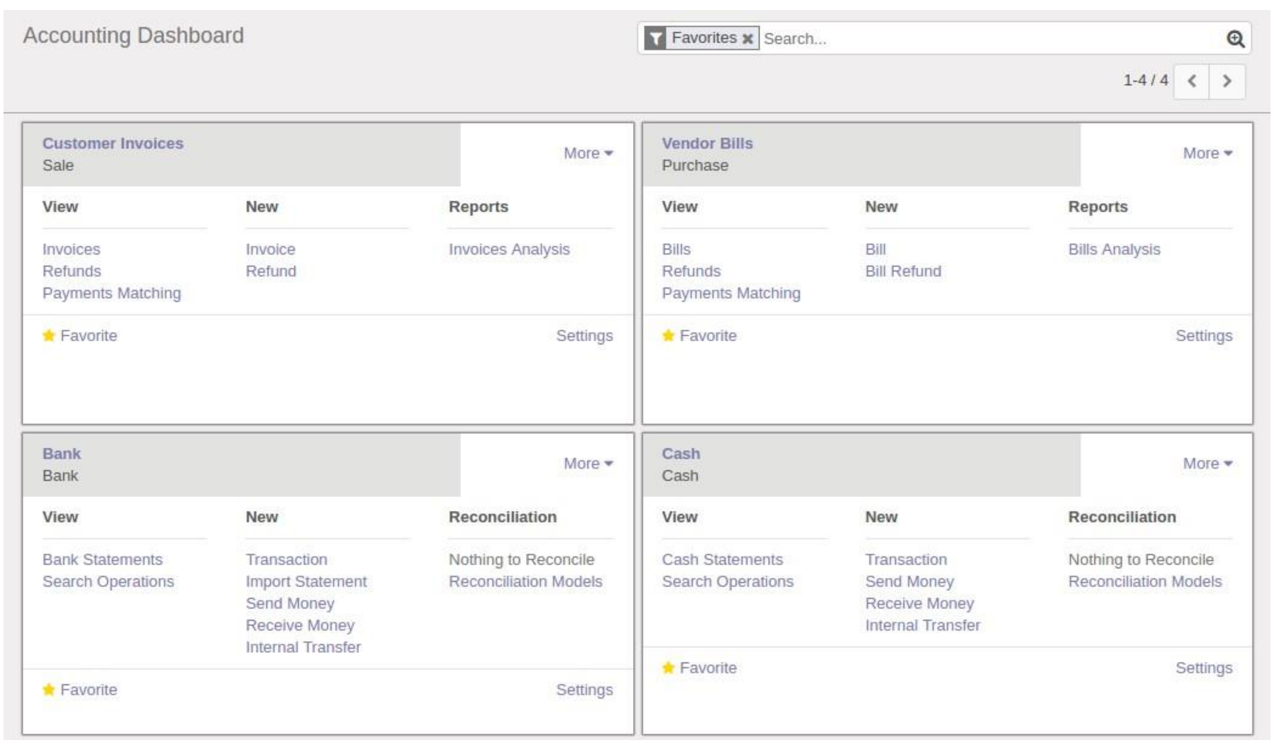
You can create new customer invoices, vendor bills, new Bank statements, and new cash transactions from this dashboard.



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

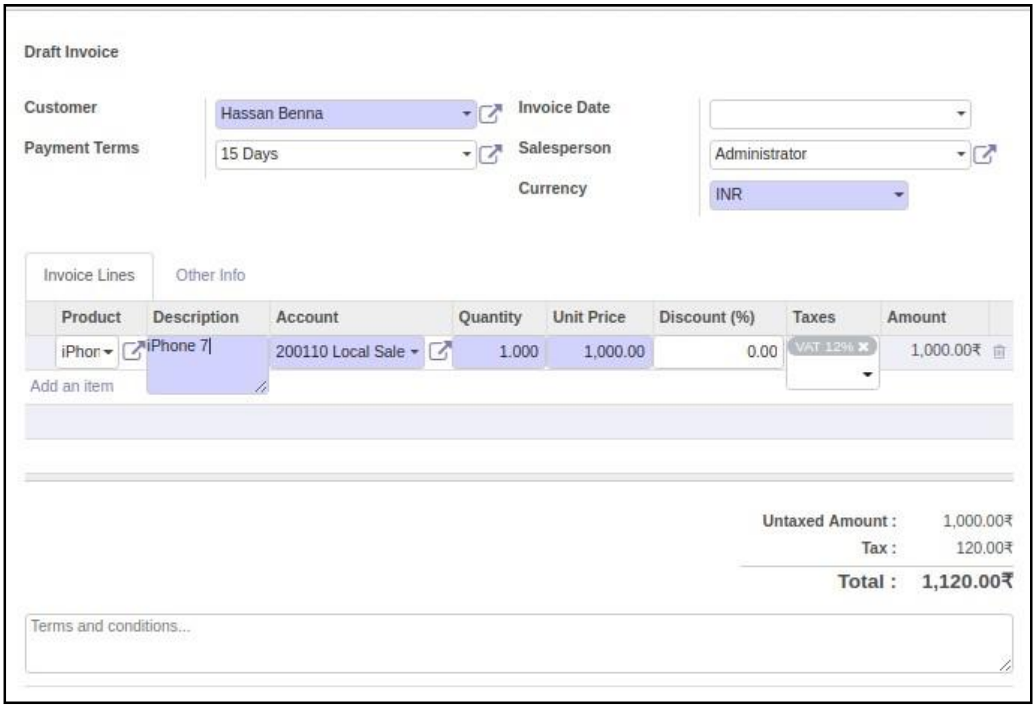


There is a lot of features accessible from Dashboard. You can go to the list of different records, create new records, you can do payments matching from dashboard itself.



Creating and Processing an Invoice

Accounting> Sales> Customer Invoice> Create



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:

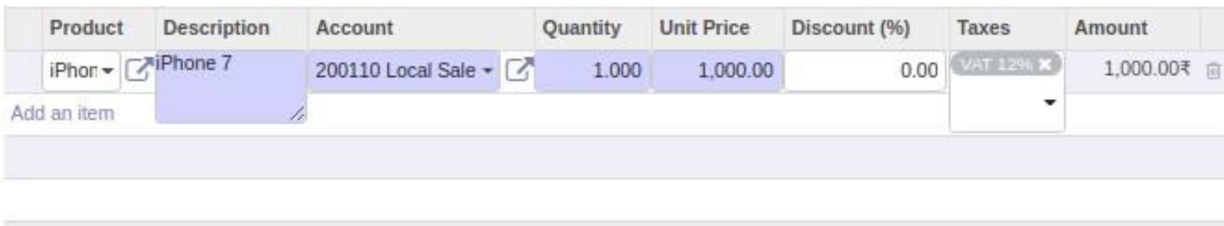
When the invoice is fully paid.

5. Cancel:

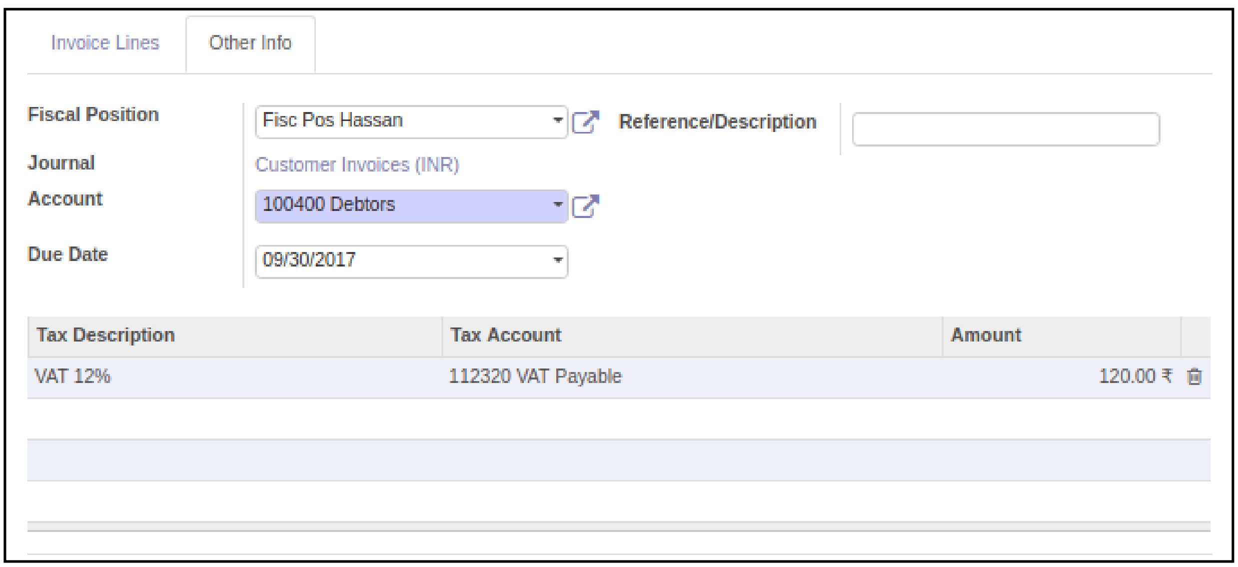
Cancel status is used when user cancels an invoice.

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

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



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



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

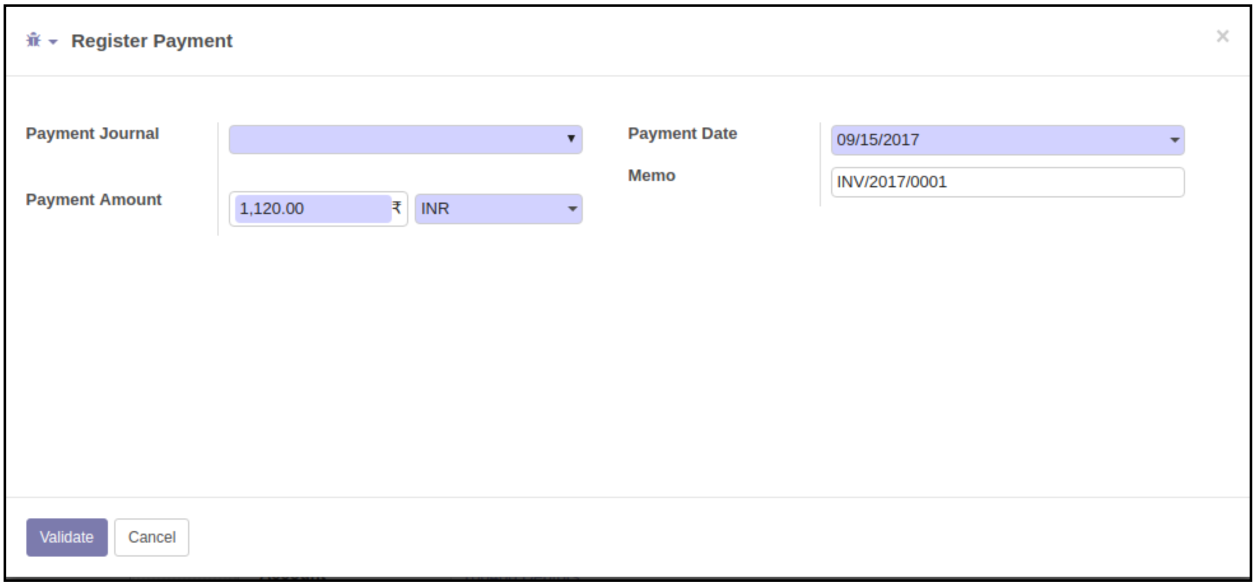
Journal	Customer Invoices (INR)	**Reference**	
Date	09/15/2017		

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.

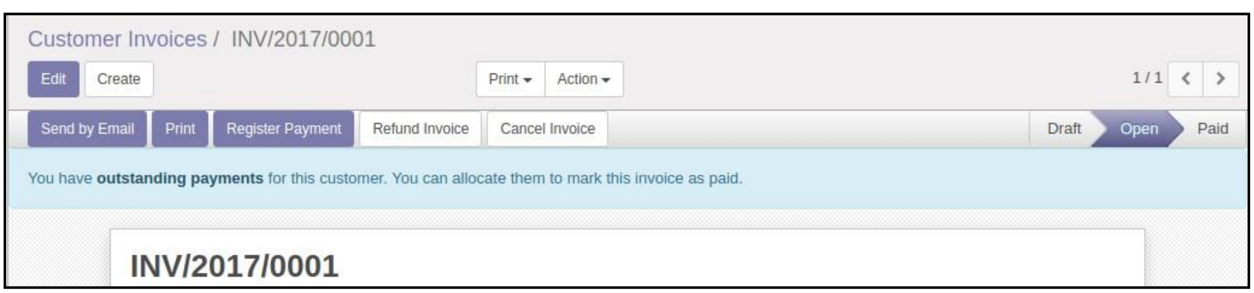
By clicking the '**Register Payment'** you can record a payment against this invoice.



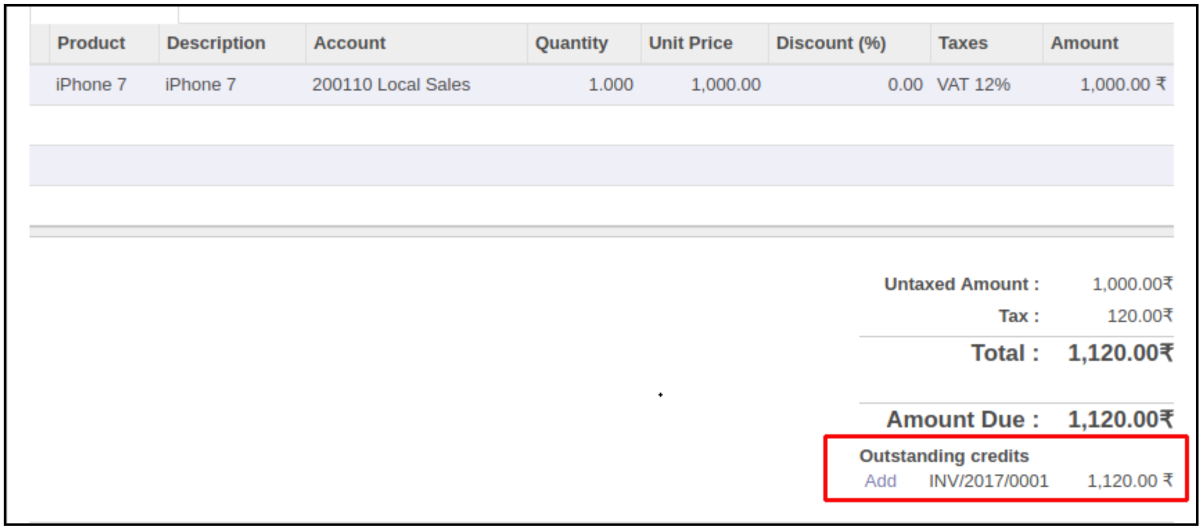
We can choose a payment journal (cash/bank/..) here and the payment amount will be the full residual amount of that invoice. If we are recording a partial payment, then we can change the value there.

- 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

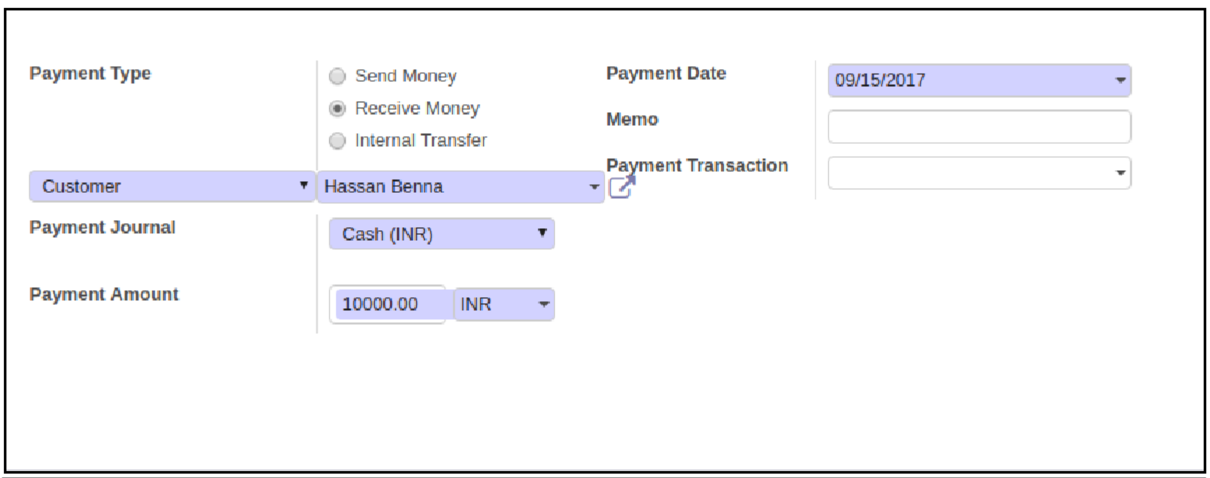


You can assign that outstanding balance by clicking add button on that outstanding payment



Payments

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



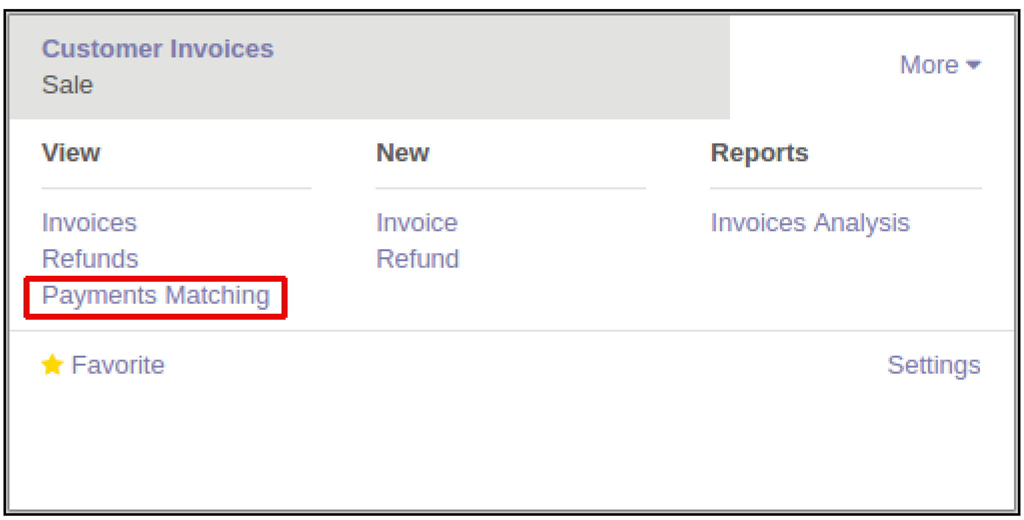
Payments have four states

- 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.

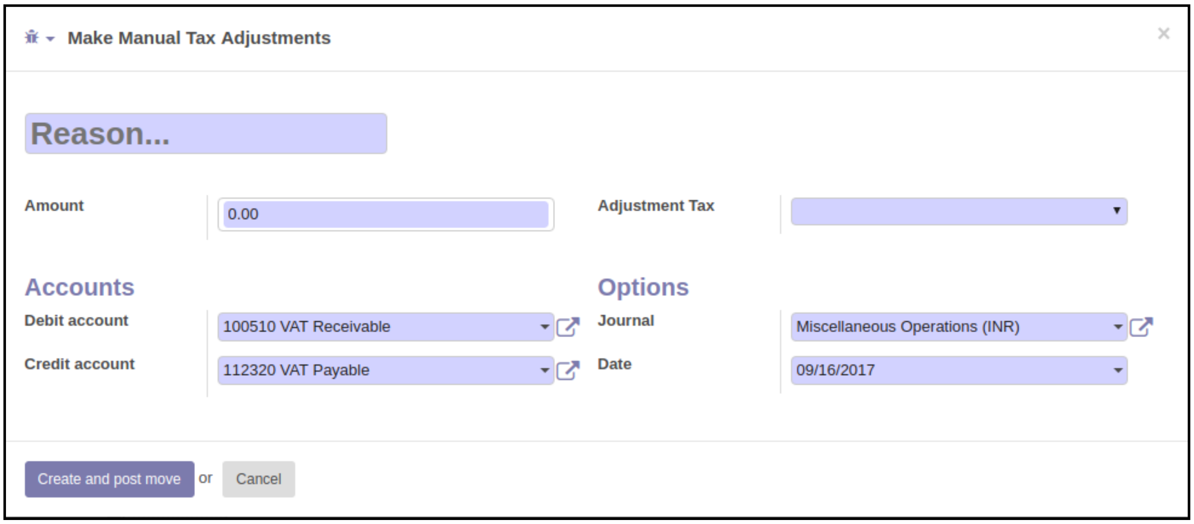
Manual Payment & Invoice Matching

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.



You can also access this from the dashboard.

Manual Tax Adjustment



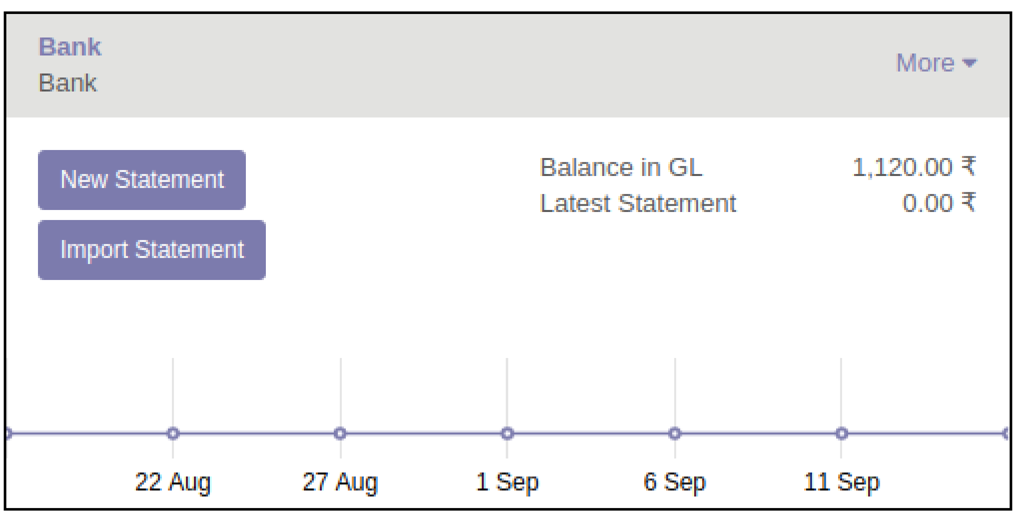
This feature is used to manually correct the VAT declaration through a miscellaneous operation

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

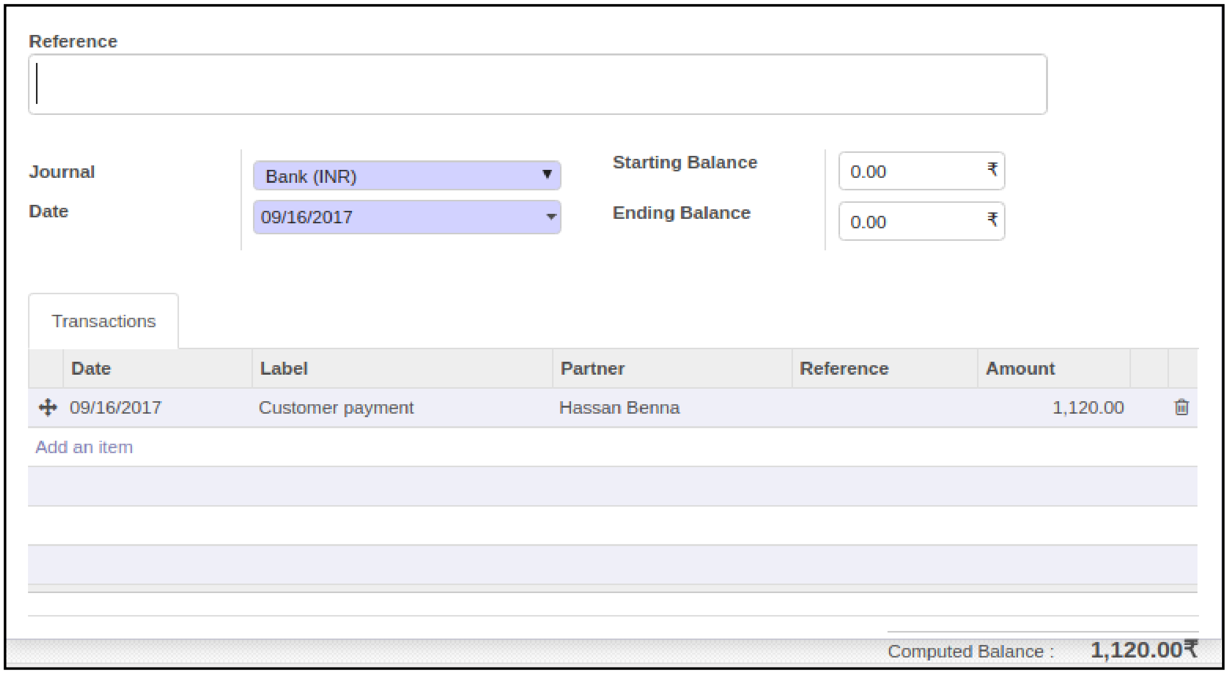
Submitting data will create a Journal entry with the details provided

Working with Bank Statement

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



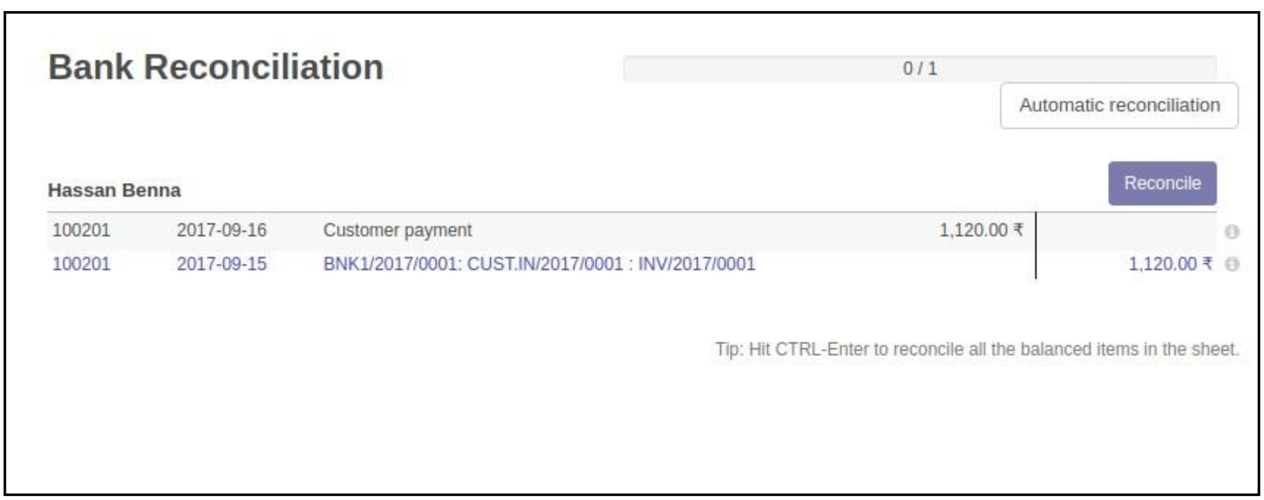
Using the **New Statement** button we can create a new bank statement. That will open up a form like this



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

- New
- Validated

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



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

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

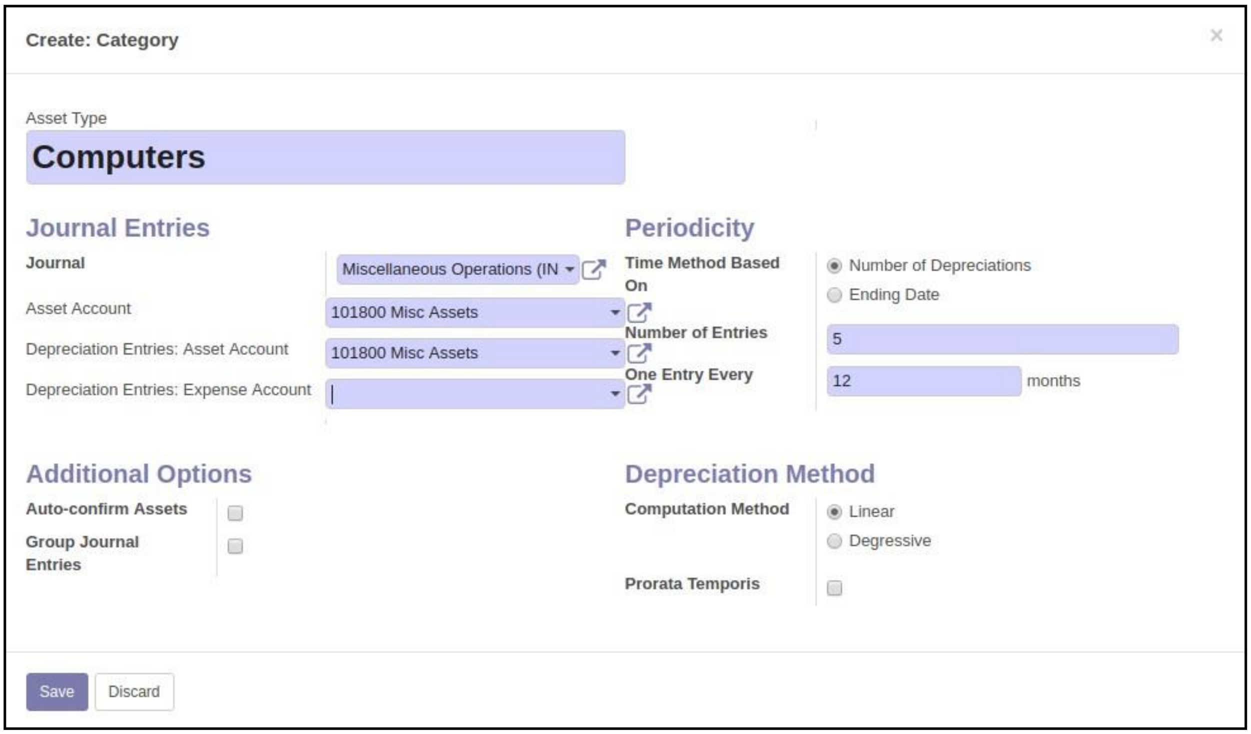
Asset Management

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.

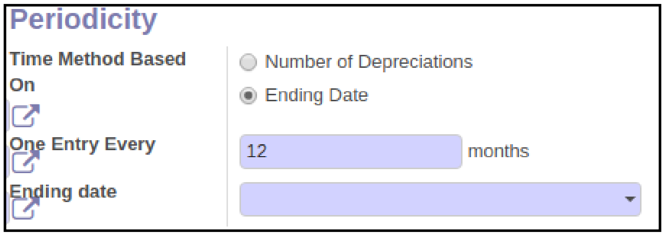
Create Asset Type

Accounting > Configuration > Management > Asset Type



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



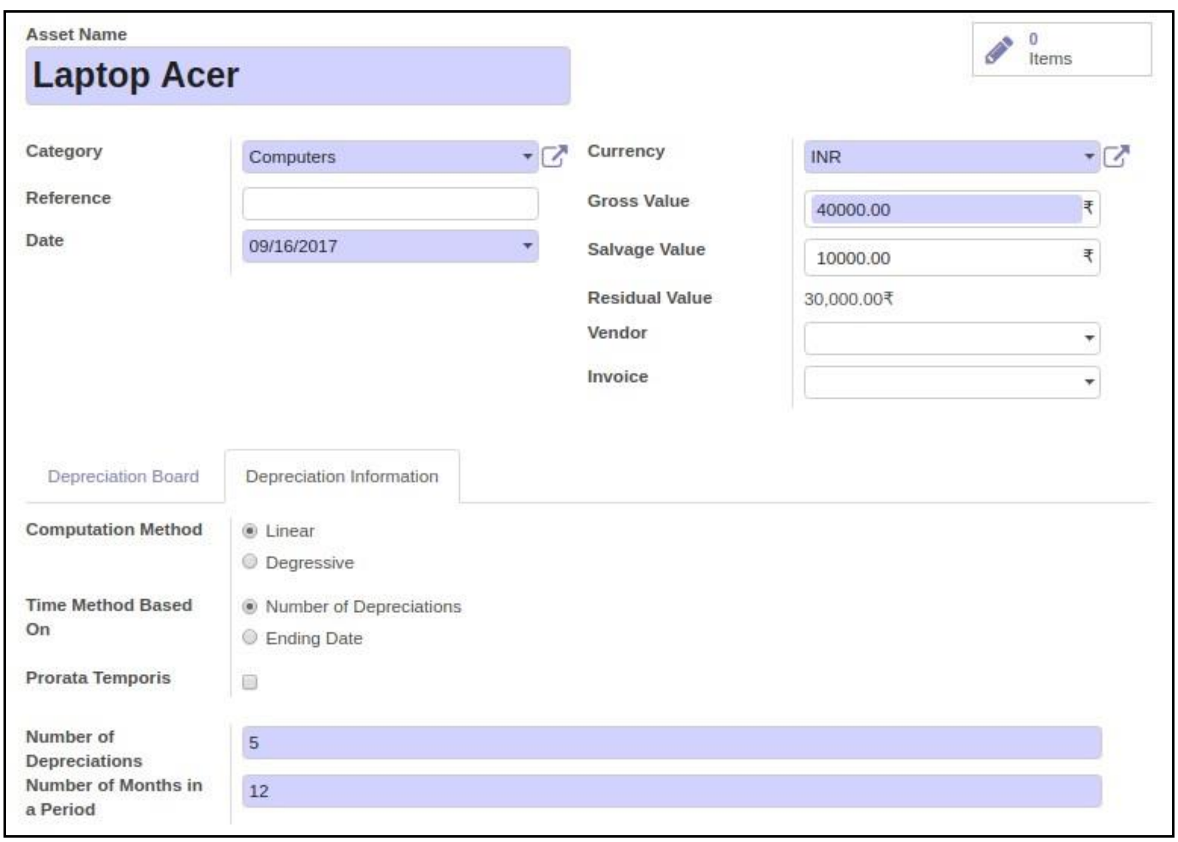
- **Computation Methods:** Here we can choose the method to use for computing the depreciation amount. Here also we have two options
- **Auto-confirm Assets:** Ticking this option will auto confirm all the assets comes under this category when they created from the invoices.
- **Group Journal Entries:**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



Here we can fill the details of your asset

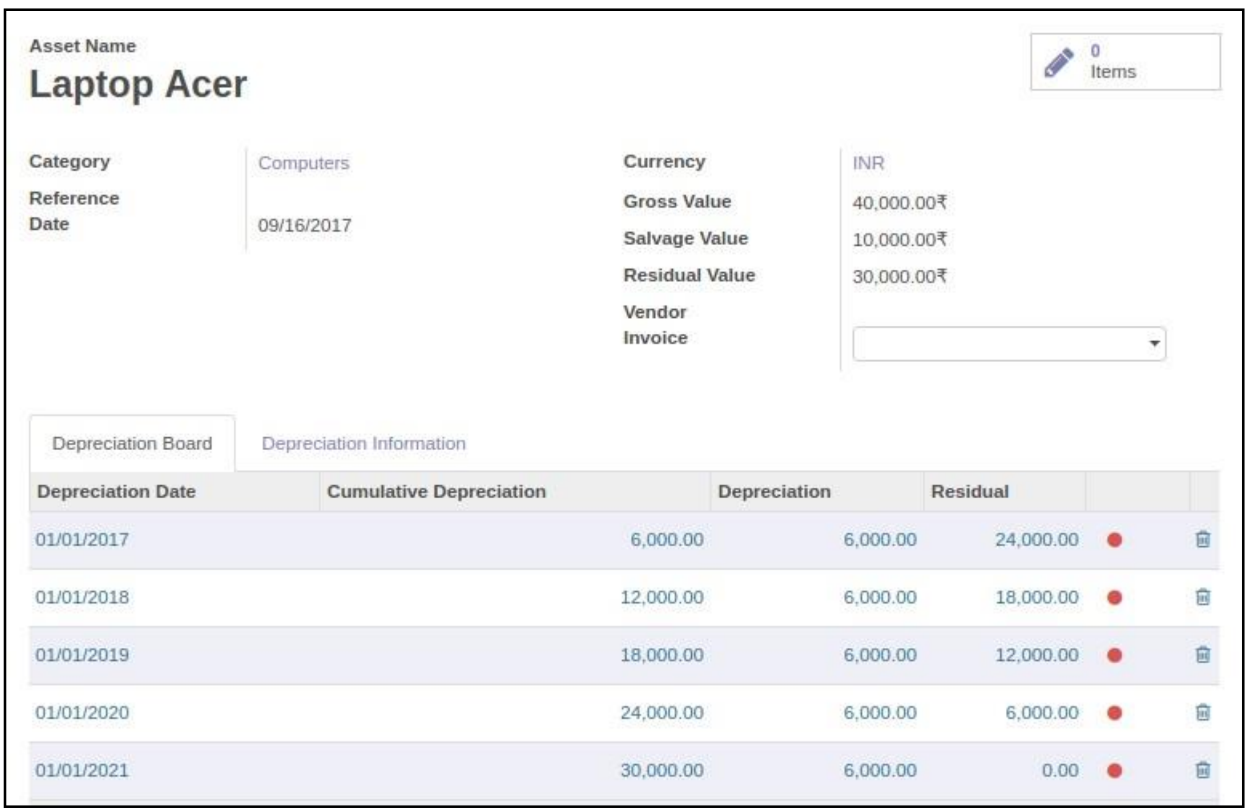
- **Salvage value:** this is the amount you plan to have that cannot depreciate
- **Vendor:** The vendor from we purchased this asset
- **Invoice:** The invoice related to the purchase of this asset

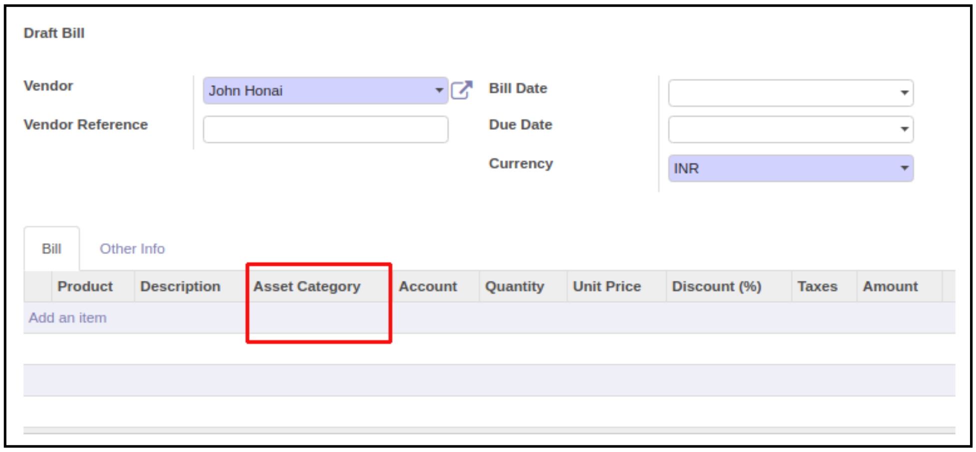
An asset have three states

- 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





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.

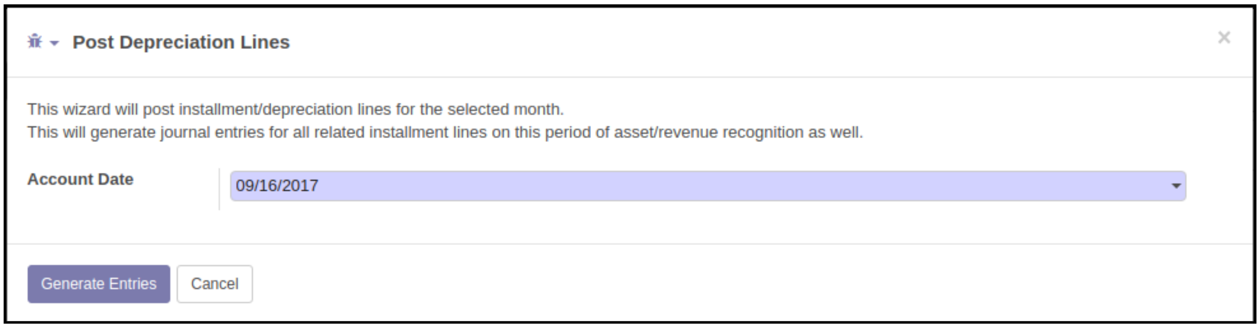
To modify the depreciation of an asset, Click on the <**Modify Depreciation**> button and provide the values accordingly.

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

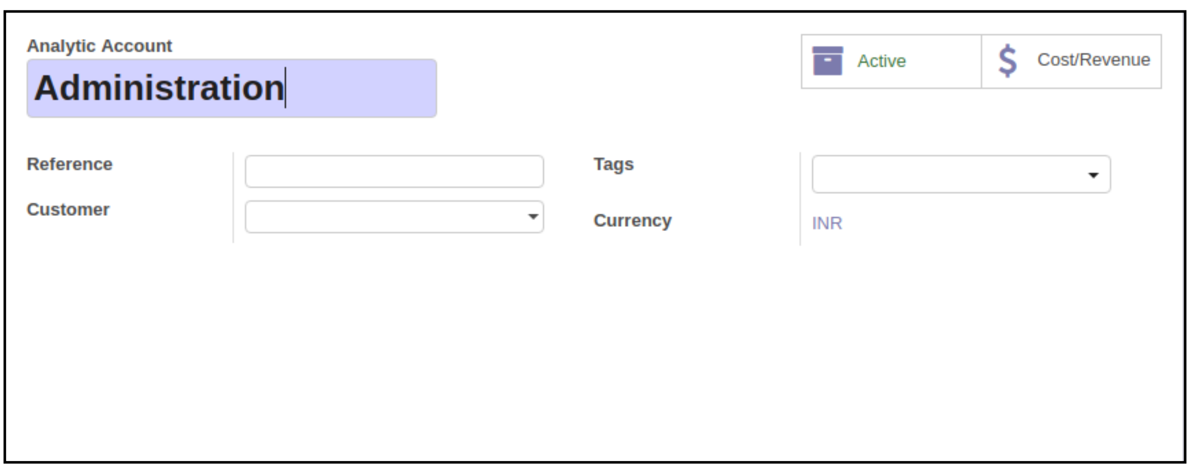
Odoo have a feature called analytic accounting. This is an advanced feature that we can use for different purposes. Like,

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

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

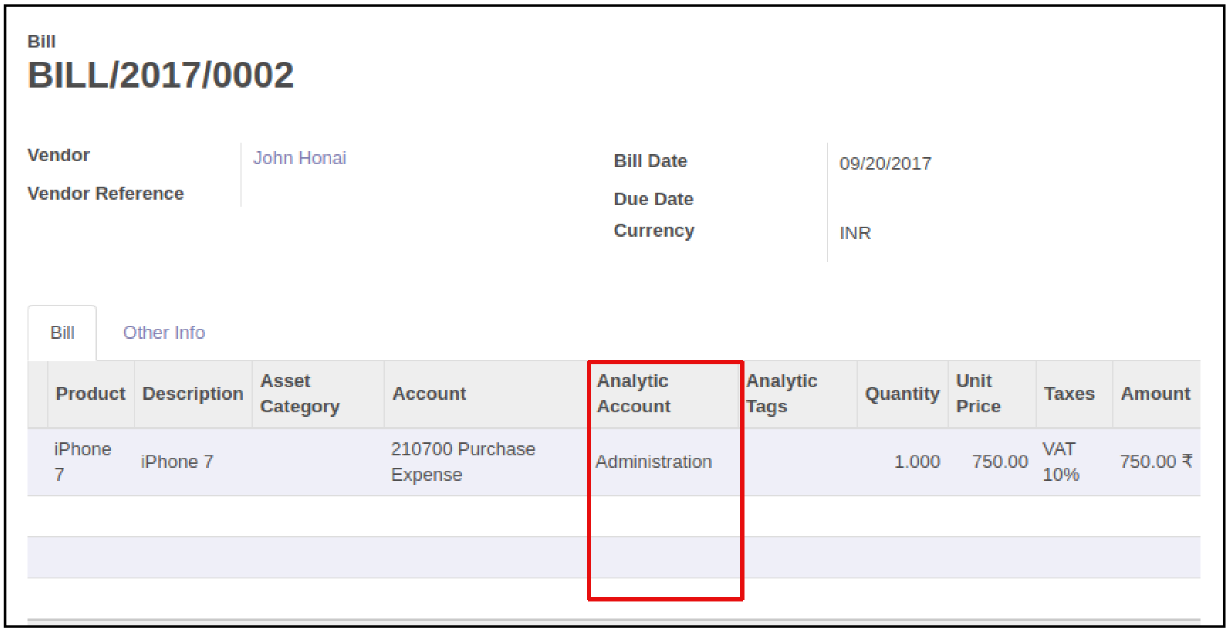
We have to create analytic accounts here,

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

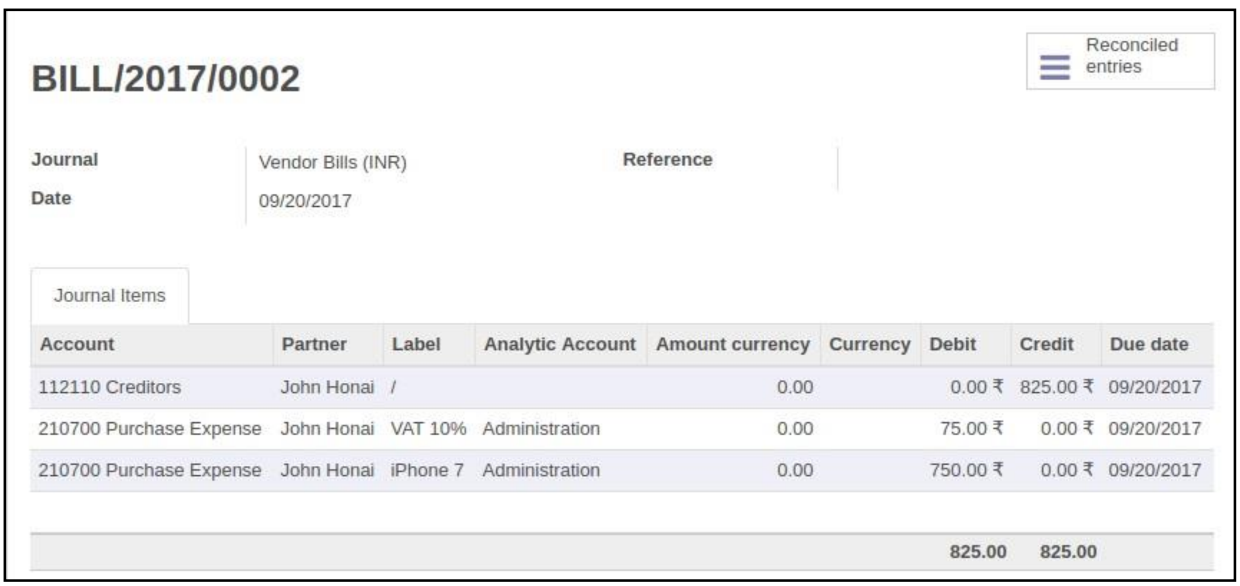
BILL/2017/0002

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

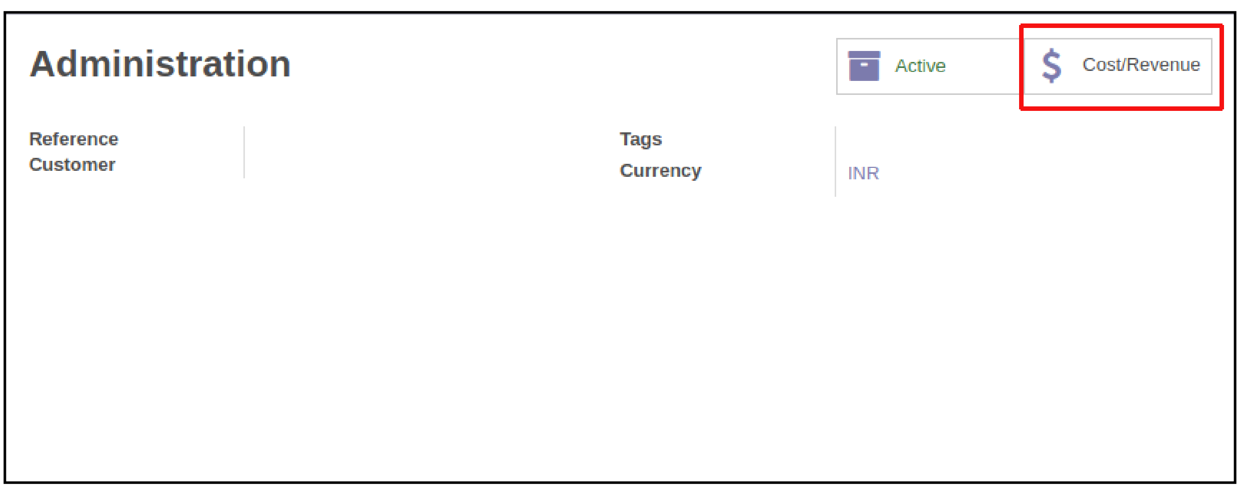
Journal	Vendor Bills (INR)	**Reference**	
Date	09/20/2017		

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.**

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'.



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

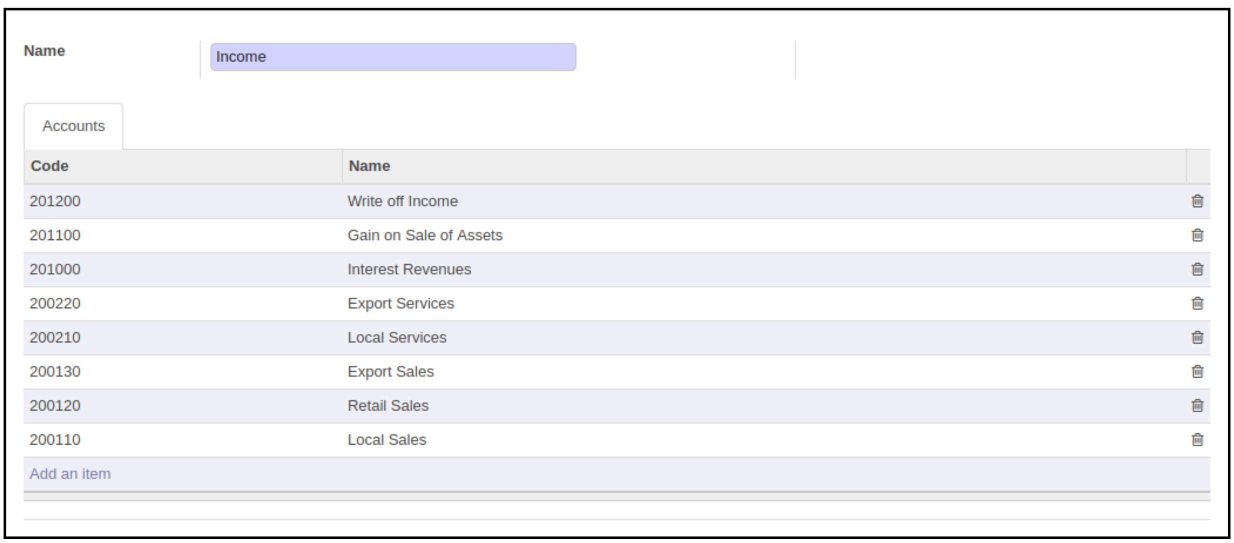
Budgetary positions are a kind of mapping the general accounts with budgets Let's create a budgetary position.

We can create budgetary position from Budget form itself,

Or we can create from

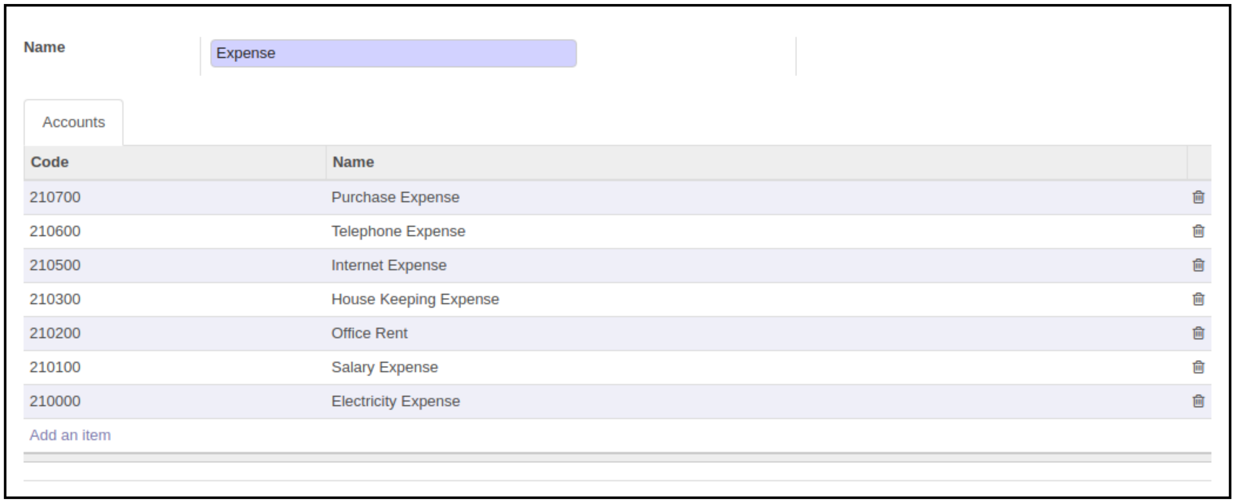
- **Accounting>Configuration>management>Budgetary Position**

We are now creating a budgetary position Income.



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

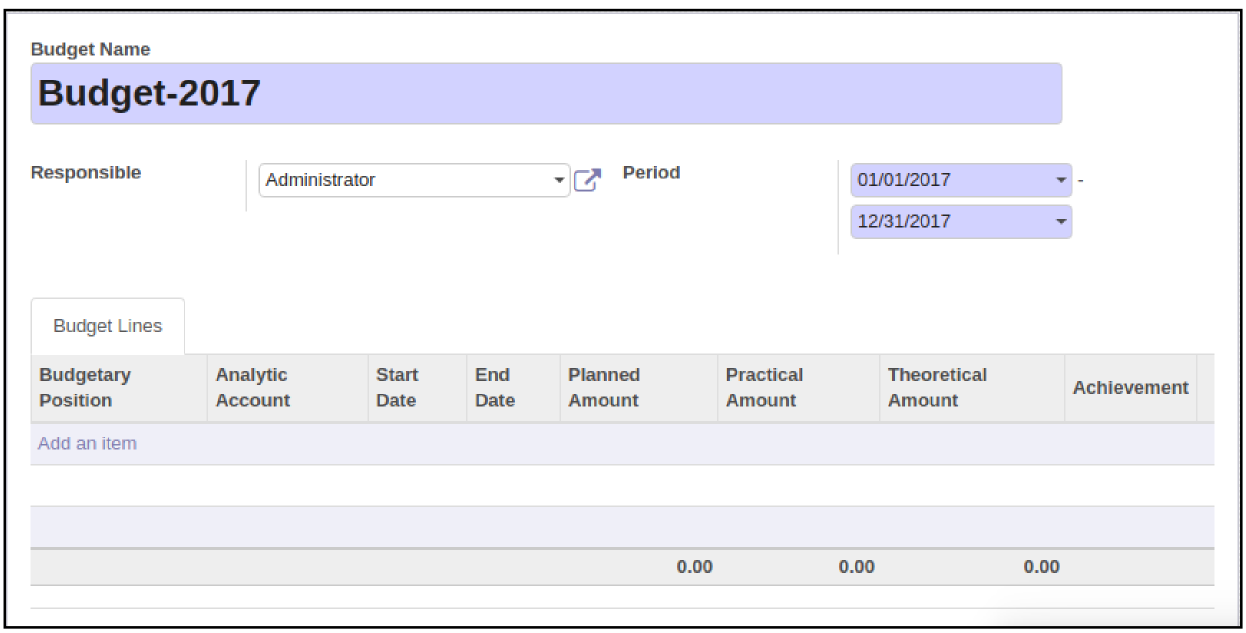
We have selected some General accounts under this budgetary position. Same way we are creating another one, Expense.



Now we have two budgetary position in our system.

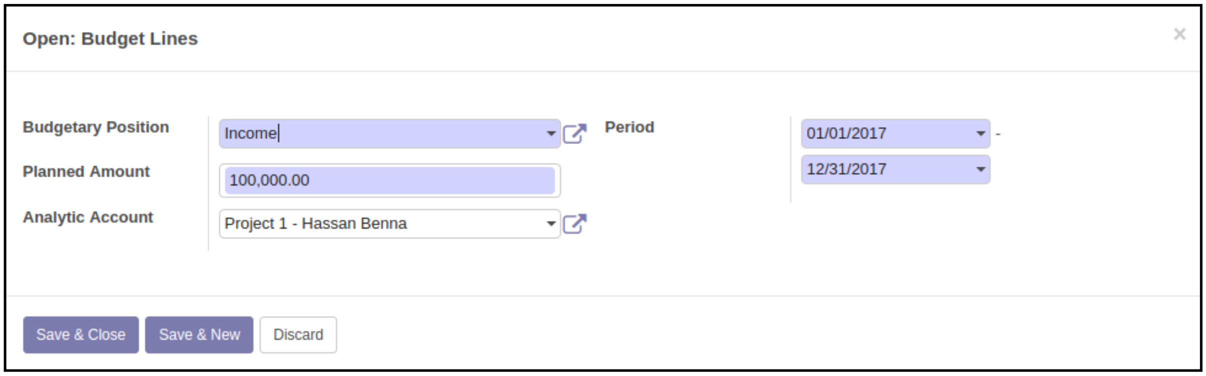
The role of analytic accounting comes when we have to get the details based on a specific Customer/Supplier or a project. We already discussed how we can create an analytic account.

So we are moving to the configuration of budget.

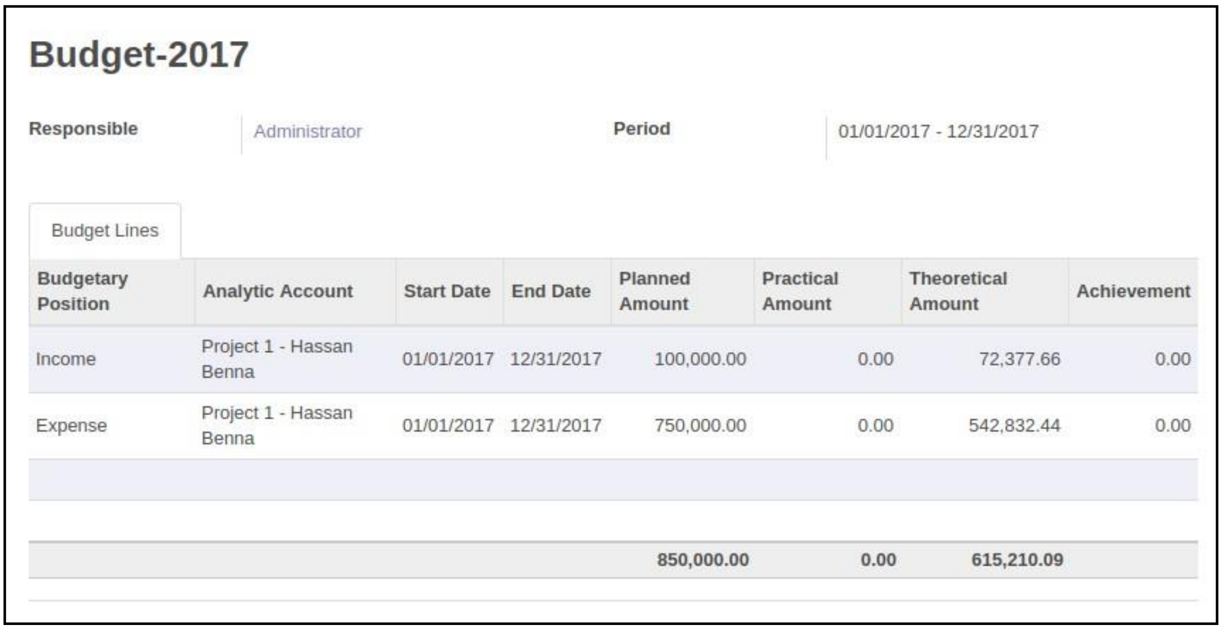


As we can see on the picture, we have to give a **Name** for budget and also a **Period**. Then we must add our budgetary positions we already created to this budget.

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



- 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.

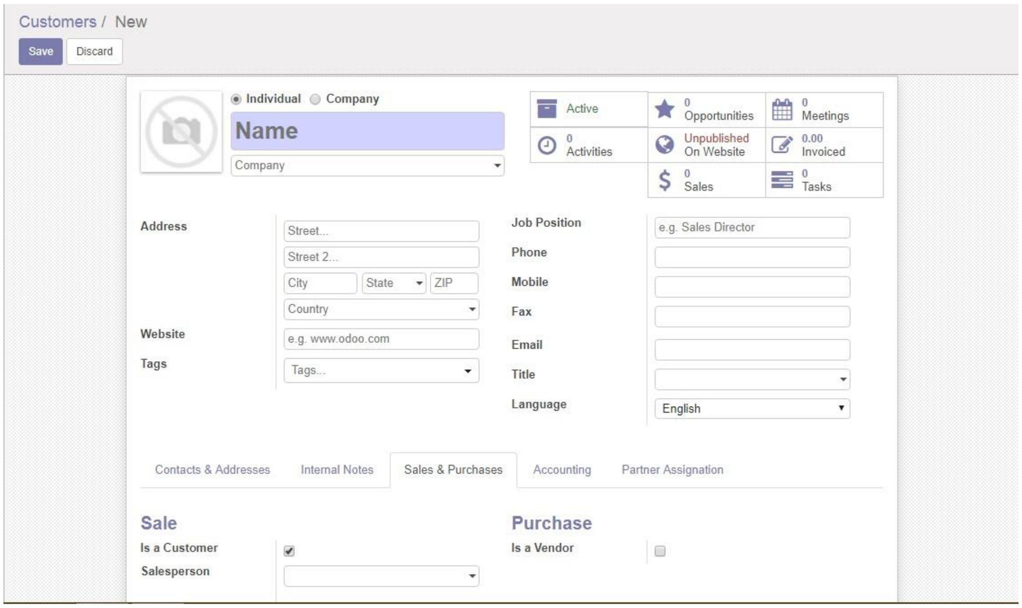
User - All documents: - may be a sales head, he has to view all the documents by all sales representative.

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**



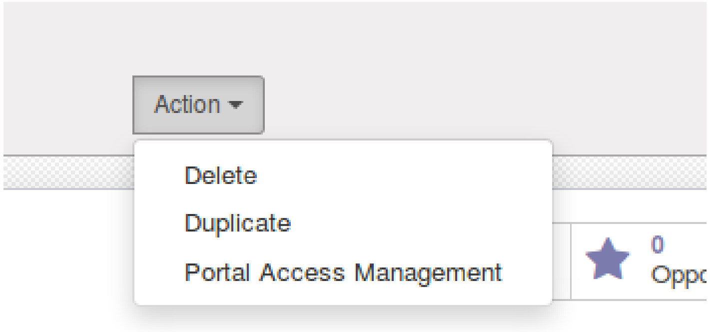
Tick **Is a Customer**, Is a Vendor check boxes in Sales & Purchases according to the nature of entity.

- Use **Partner Assignation** 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.

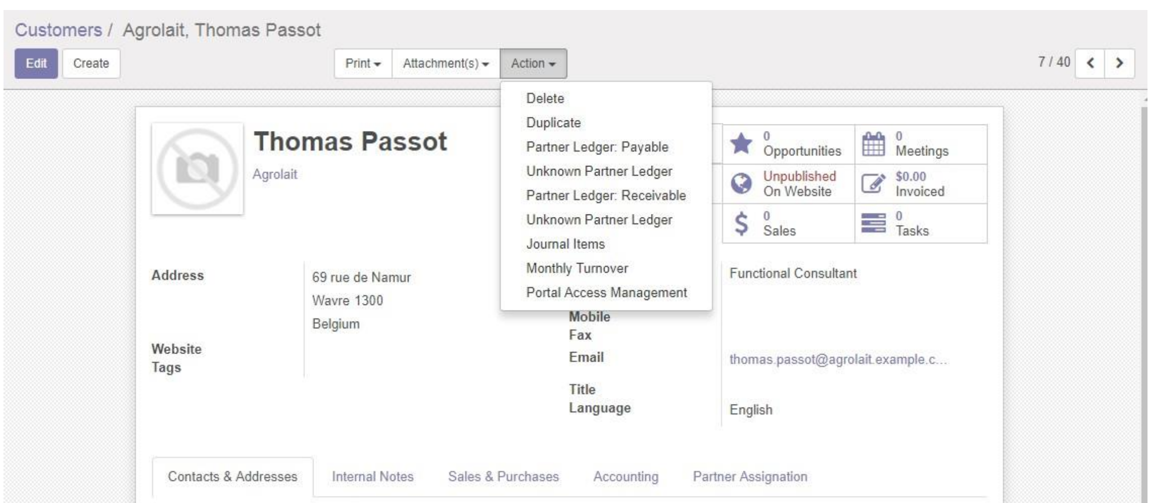


Upon clicking on the 'Portal Access Management' option, a new wizard will appear. Here we can enter the email address. The option ‘In Portal’ should be selected for those contacts to whom we wish to enable the portal access. Once we have filled the details and applied, an email will be sent to the specified 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 udder inventory management, Oddo Sales module provides a quick link under

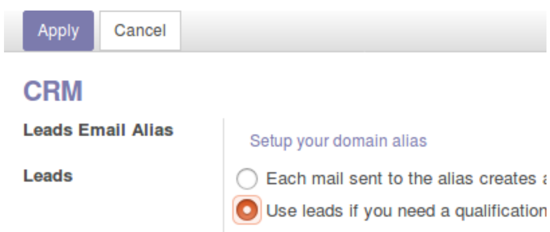
Sales > Products tab to perform product management functions like Add Product Update Stock etc. To see the full functionality and processes in Product Management refer Inventory management module

Pre-Sale Tracking

Lead Generation

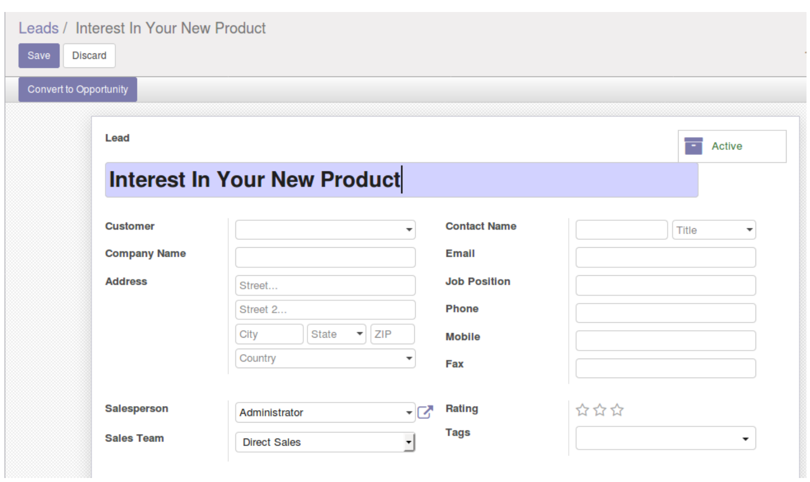
For handling our leads with Odoo, first we have to **enable the leads option from the settings**.

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



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

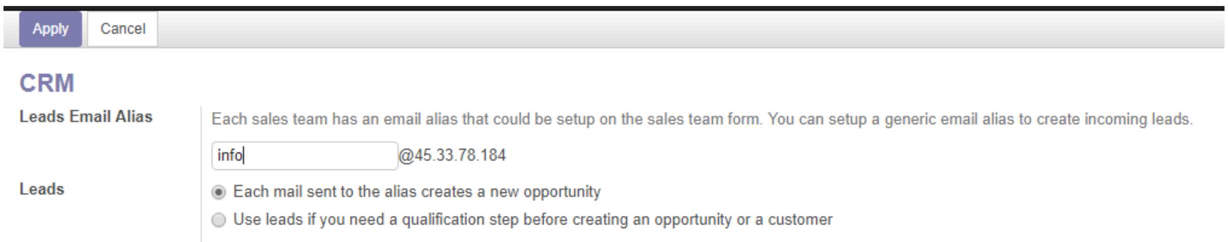
- **Sales -> Leads -> Create**



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**.

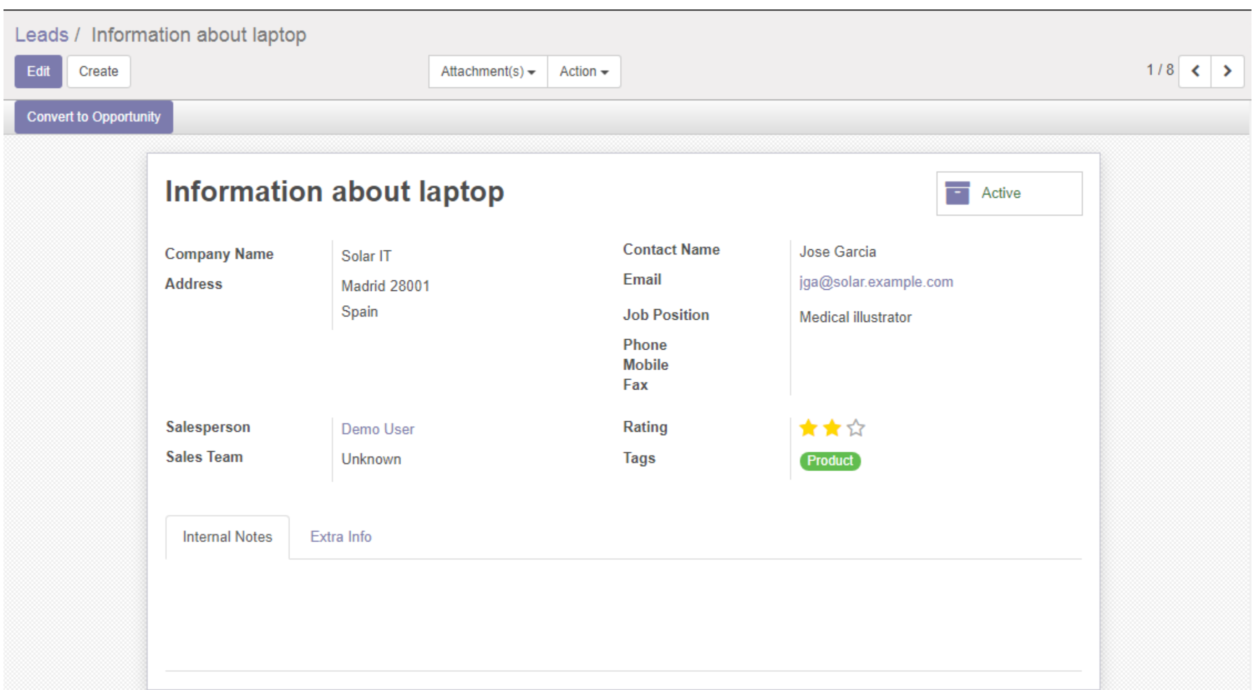
Or you can generate Leads from Incoming Mails

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.

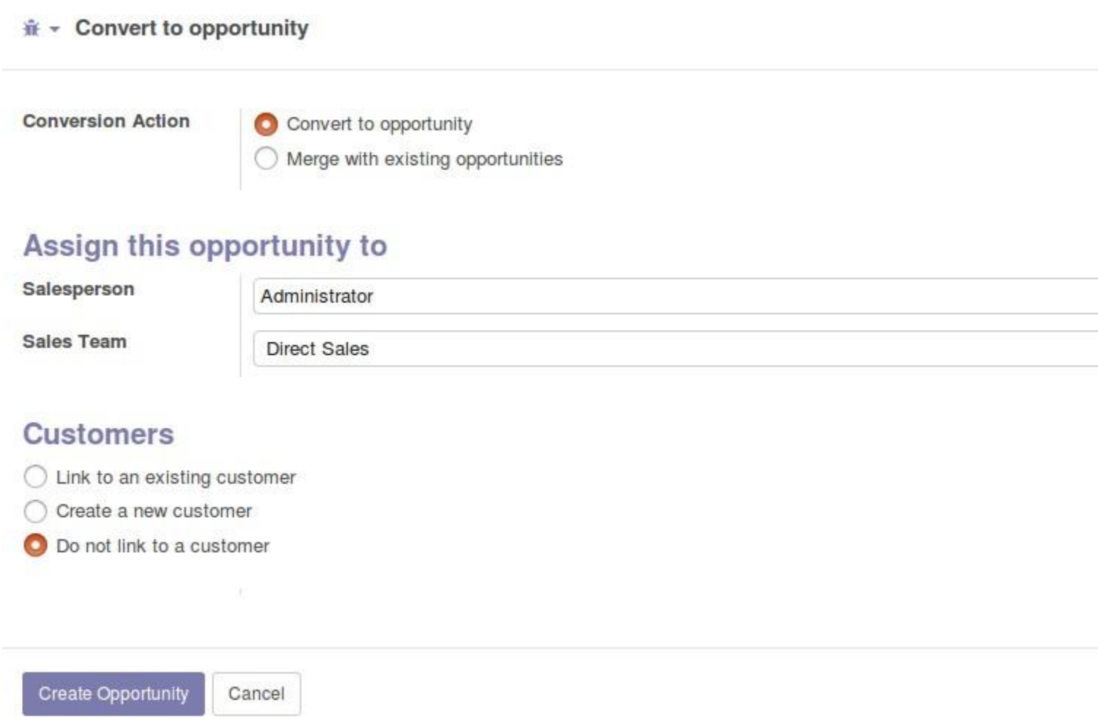


Opportunities

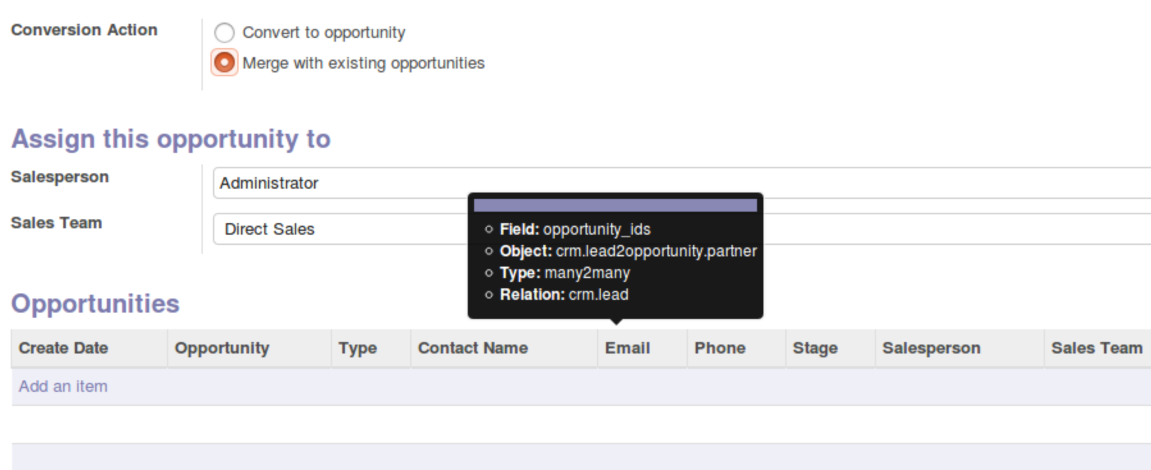
- **Sales -> Leads**



- Click **Convert To Opportunity**



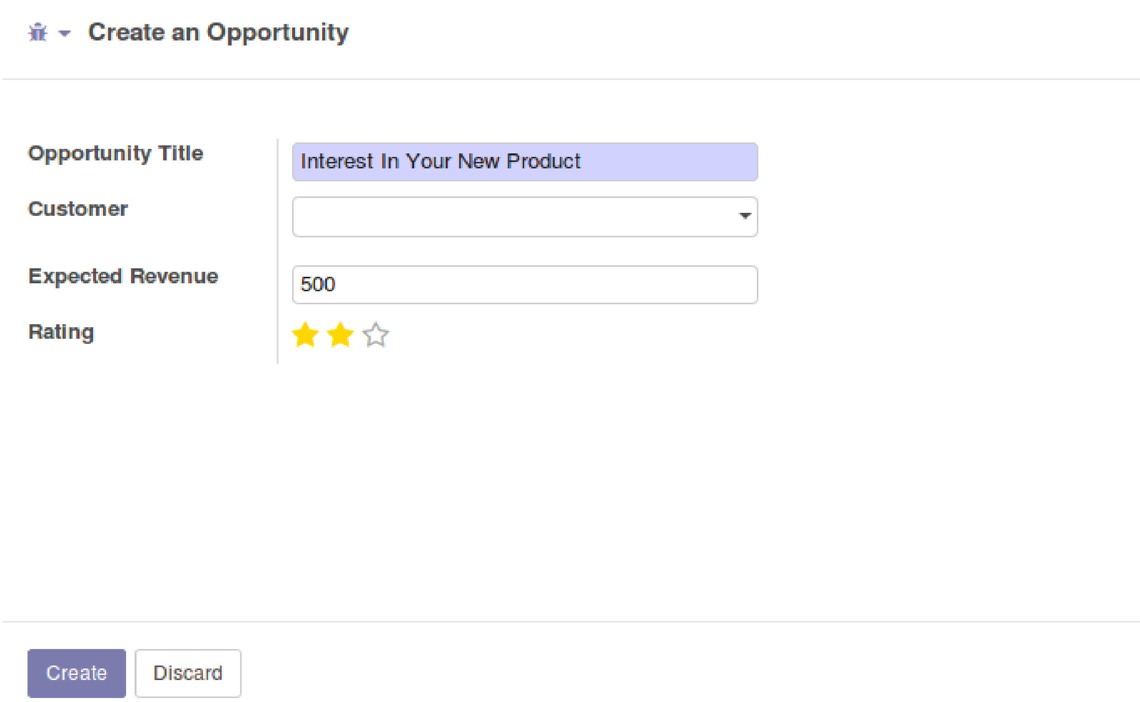
If we select the conversion action ‘**Convert to opportunity’**, then a new opportunity will be created. If ‘**Merge with existing opportunities’** is selected, then a new option will appear which will allow us to select the opportunities.



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**

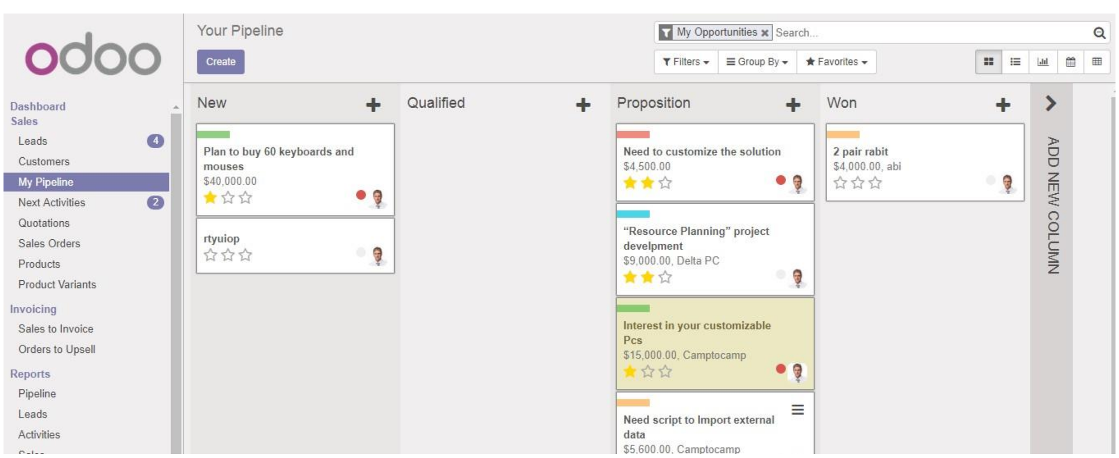


Note: - *"Once a lead is converted to Opportunity it is pipelined"*

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**

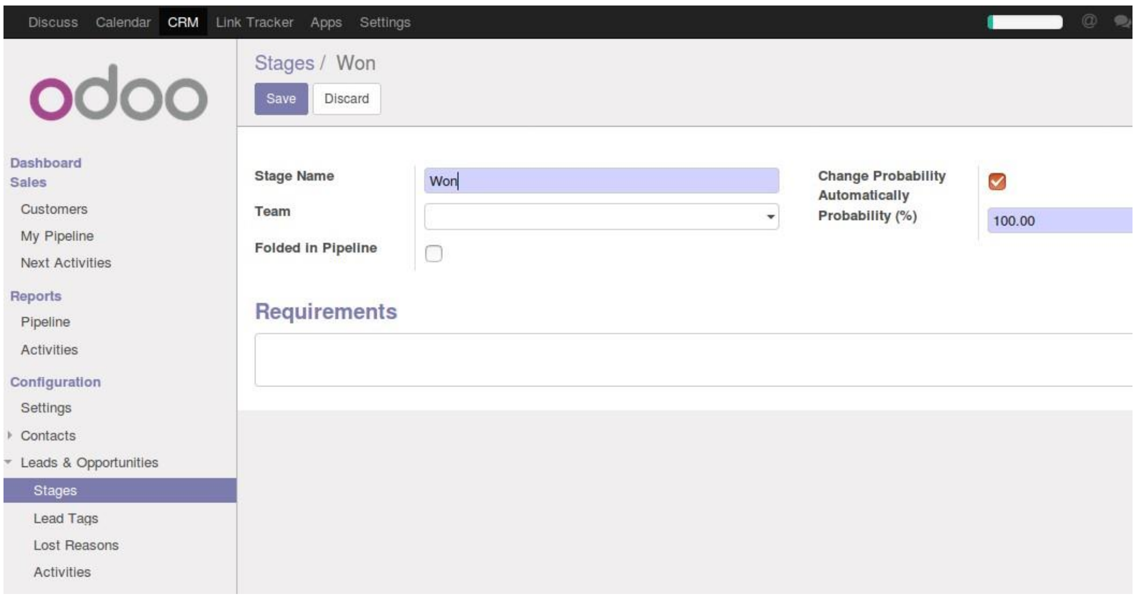


One of the main features of Odoo is the 'Drag and drop' facility in this view. **We can change the status or stage of an opportunity by simply dragging from one stage to another**.

Pipeline Configurations

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

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

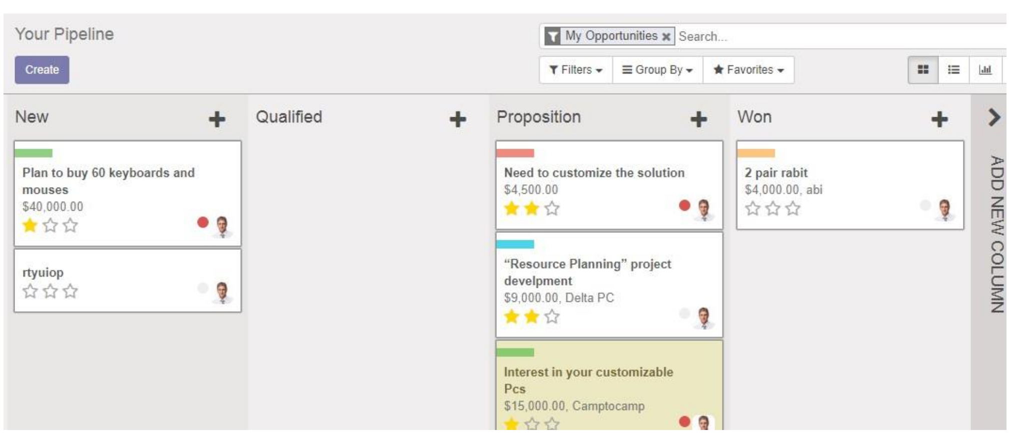


Here we need to provide a **Stage Name**, and **Stage Probability** to specify the probability of the lead when that lead is in this stage.

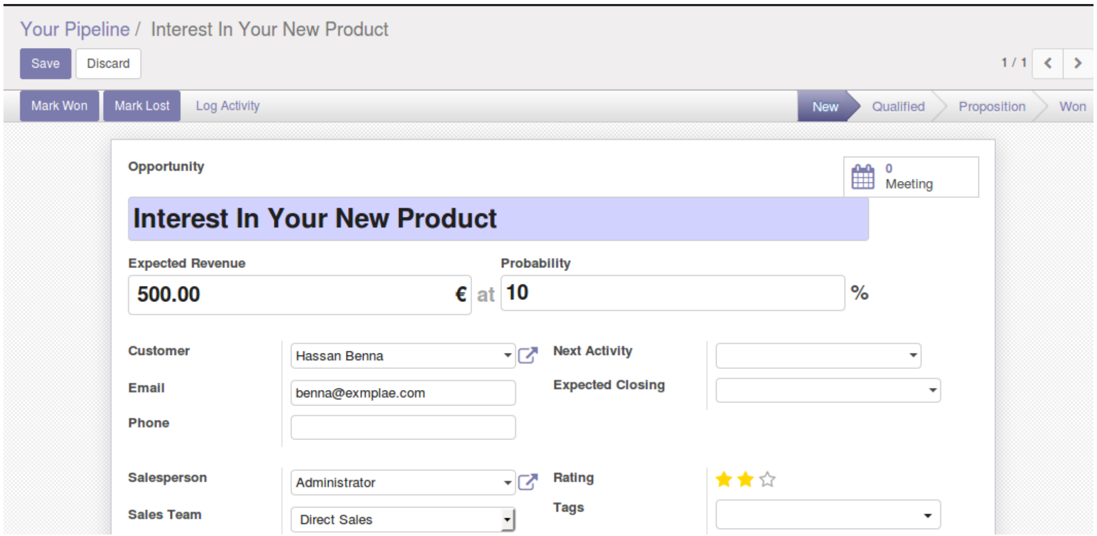
- We can relate this stage to a sales team if we need**. If we select a team, then this stage will be accessible to those team members only.**

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.



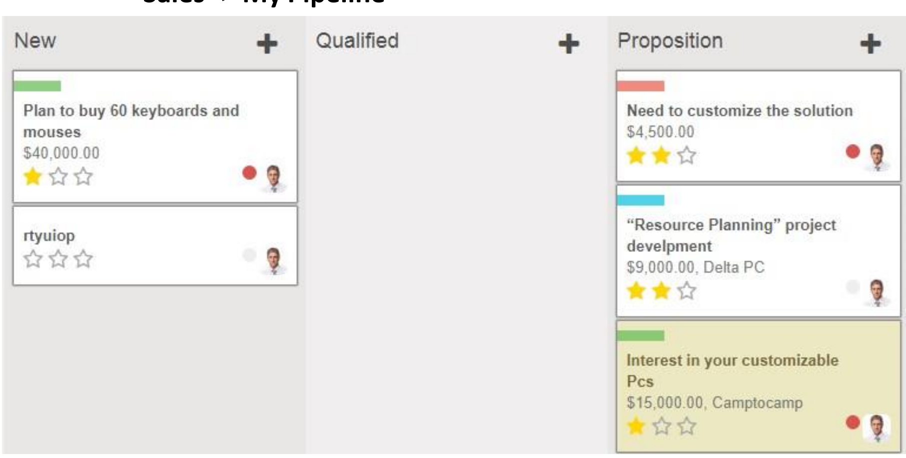
- We can use the field ‘**customer’** to select the customer related with this opportunity

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.

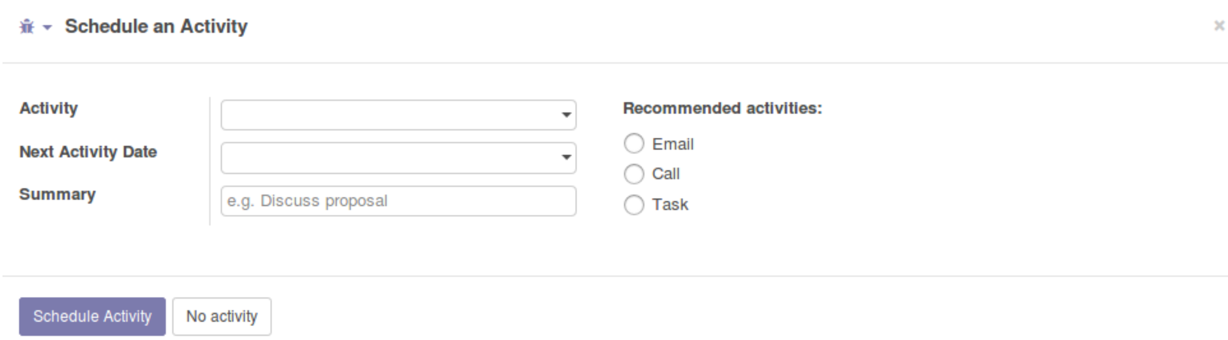
Next Activity field in Pipeline

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**

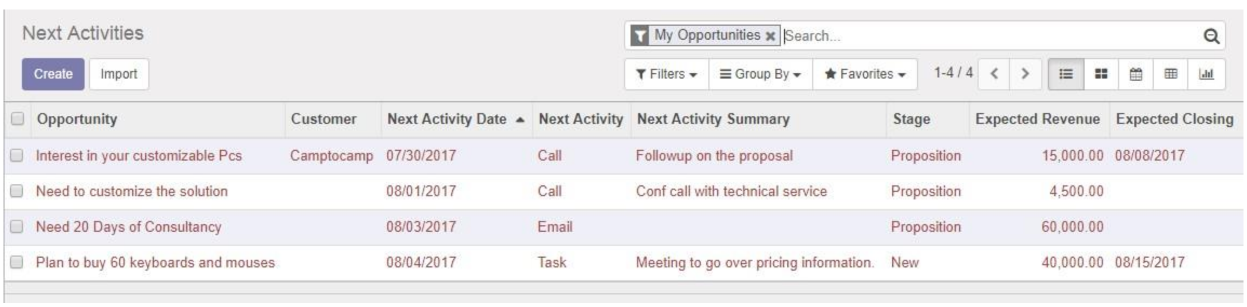


At the right bottom of every Lead, we can see a white dot symbol, which can be used to assign **Next Activities** to this opportunity. Upon clicking it, a new wizard will appear, which will allow us to create the next activity.



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**"*

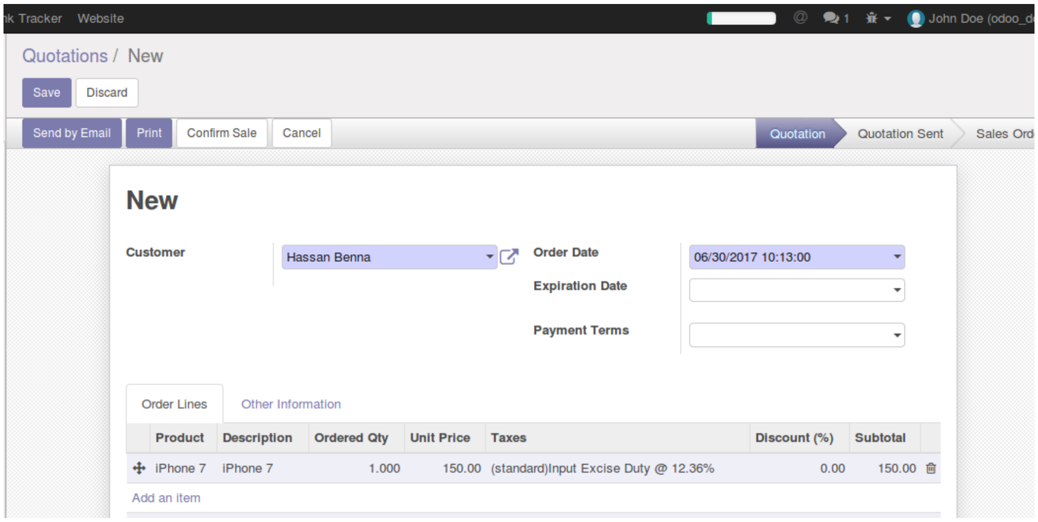


Quotation

Create Quotation

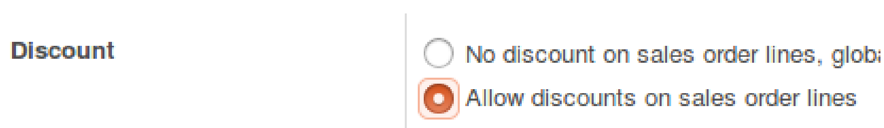
Once the opportunity has been 'Won', next level is initiating actual sales procedure. So first step is preparing a quotation and send it to the customer. You can create a quotation by two methods.

- **Sales -> Quotation -> Create**

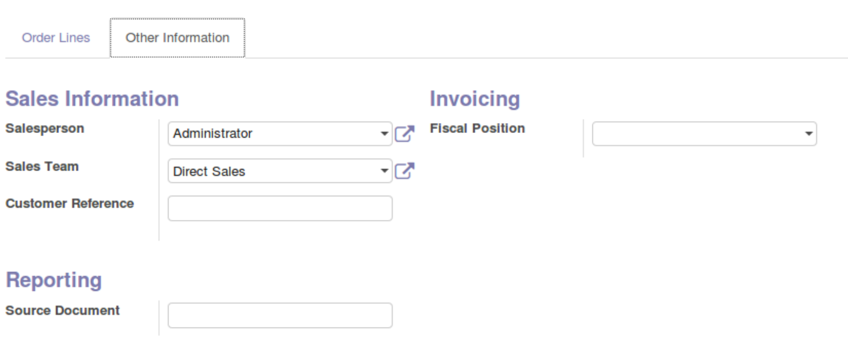


- The expiration date field is used to set the validity or expiration date of this quote. *(If this field is not set, it will be automatically calculated based on the template associated with it if online quotation is installed.)*
- The **Payment Terms** specify the conditions for paying an invoice.

  (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**.



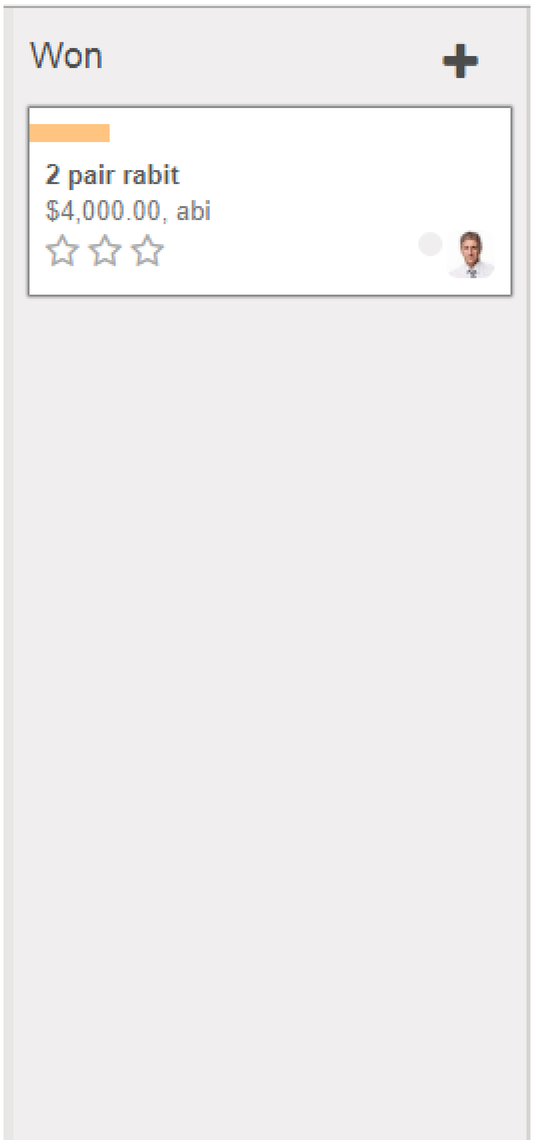
- The **'Send By Email'** button can be used to send this quotation to the customer by email.
- Under the '**Other Information'** tab, we can provide the related salesperson and his team.

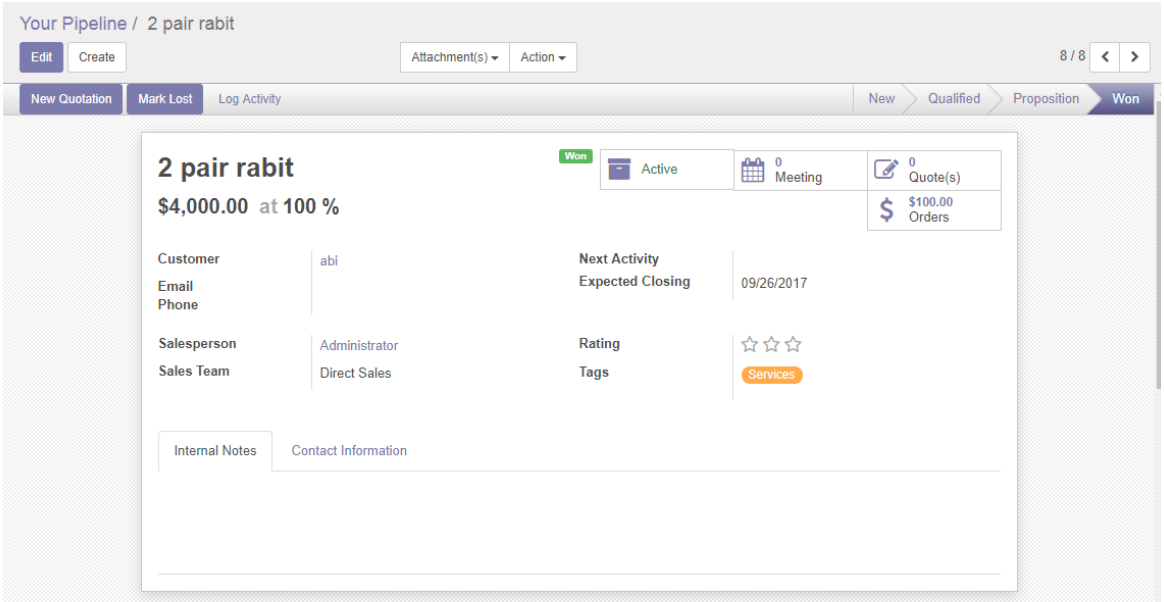


Or you can create a Quotation from your Pipeline.

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





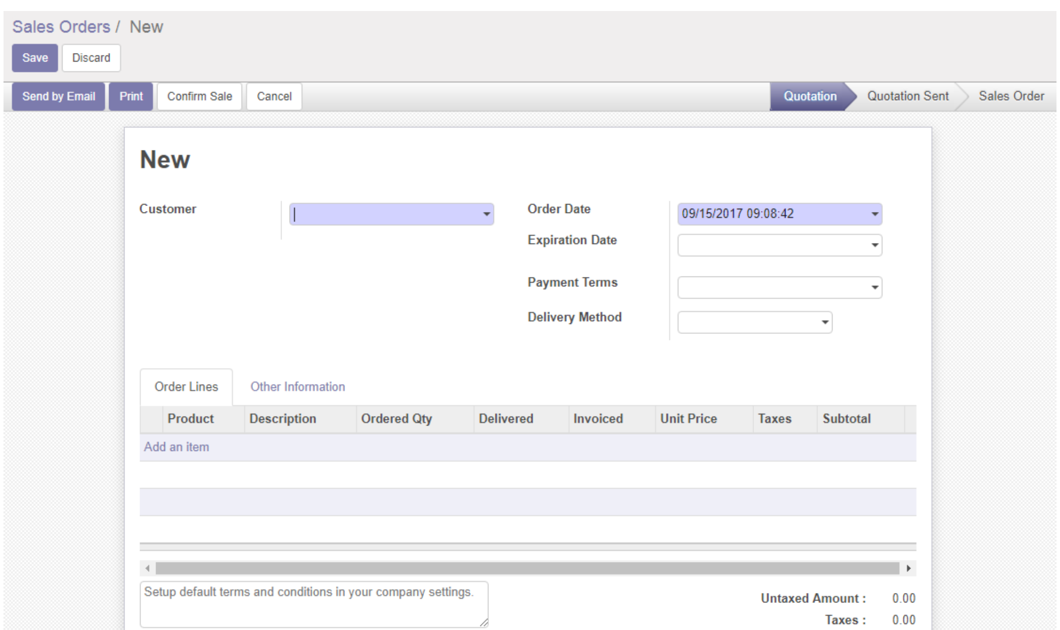
- **<New Quotation>**

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**



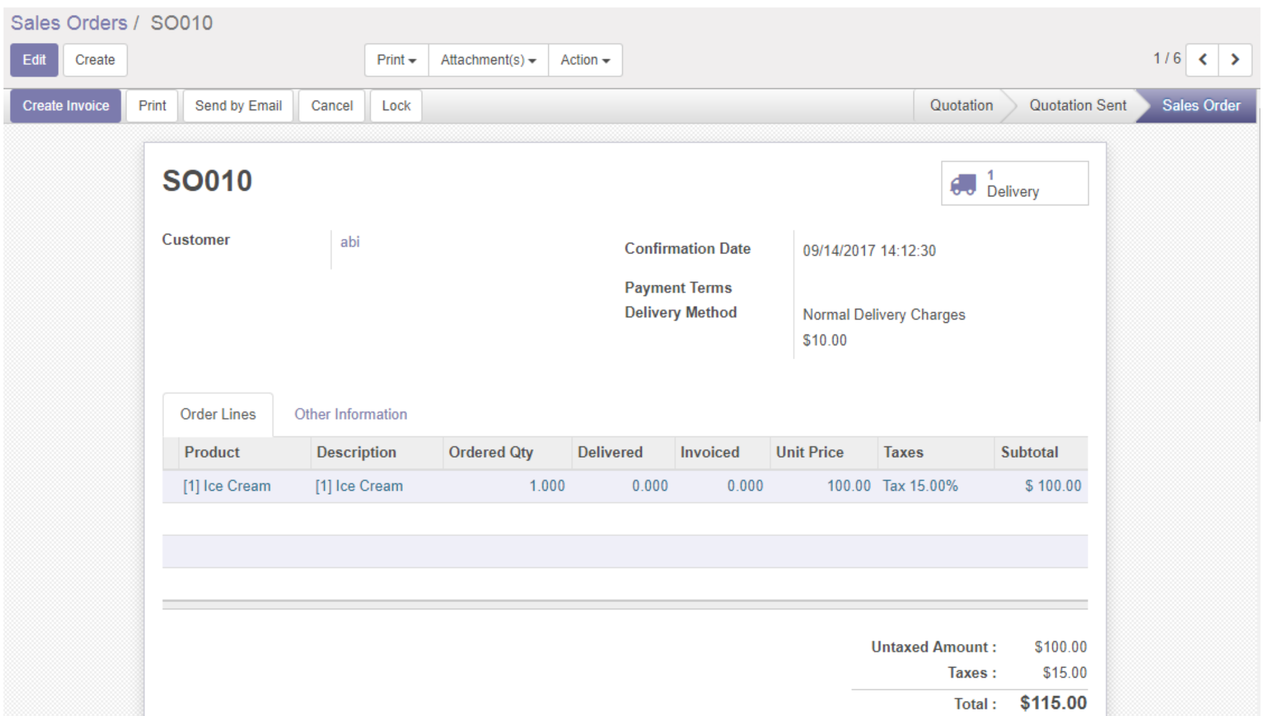
Here we get a window to create a Quotation create Quotation and click **Confirm Sale** to create sale order.

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

Create Invoice

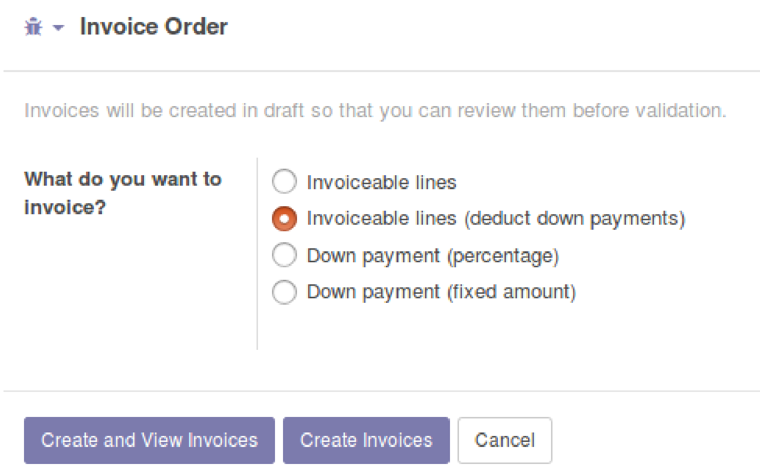
Sales -> Invoicing -> Sales To Invoice

Select the sale order to invoice.



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

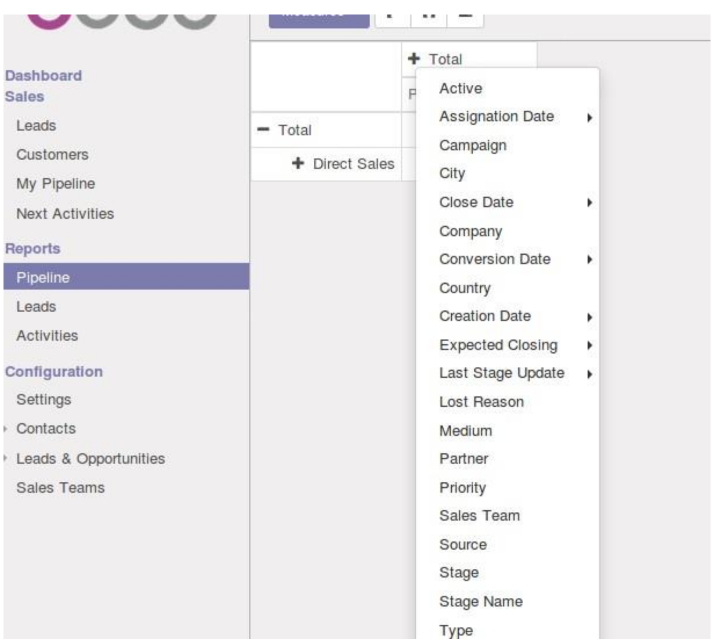


- The first option will invoice all the Invoiceable products in this order.
- Second option can be used to deduct the down payment and the other two are for providing down payment.
- If the user creating this invoice does not have access in the accounting section, he can just create the invoice. But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

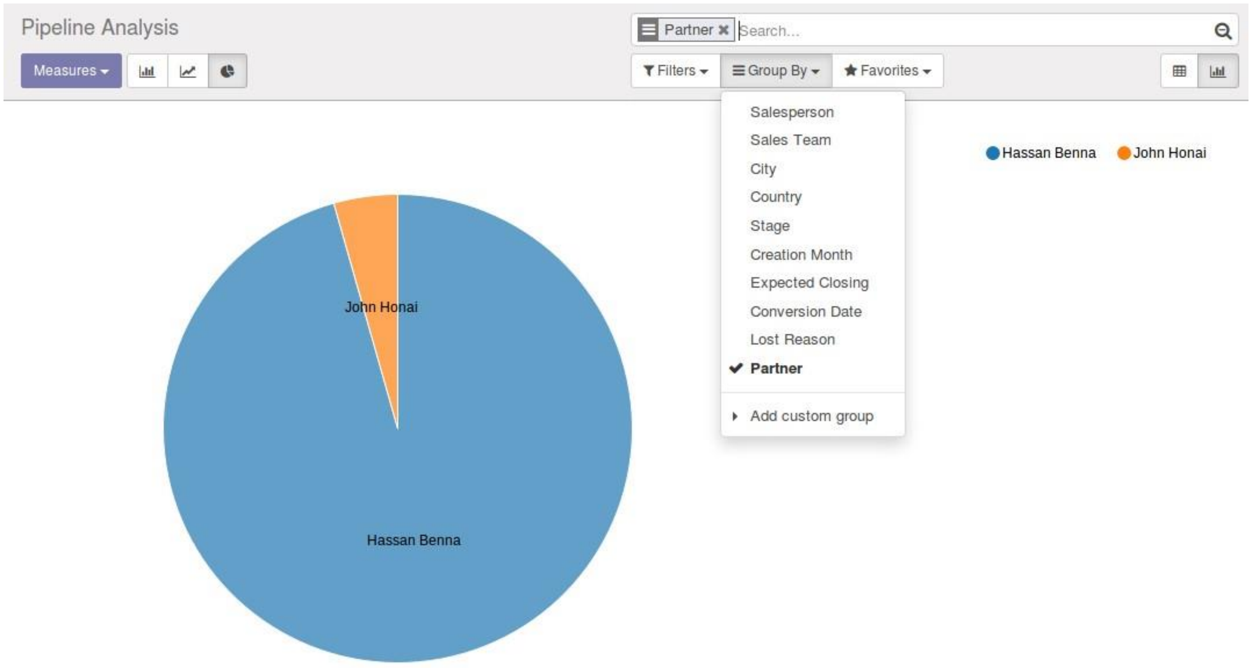
Reporting

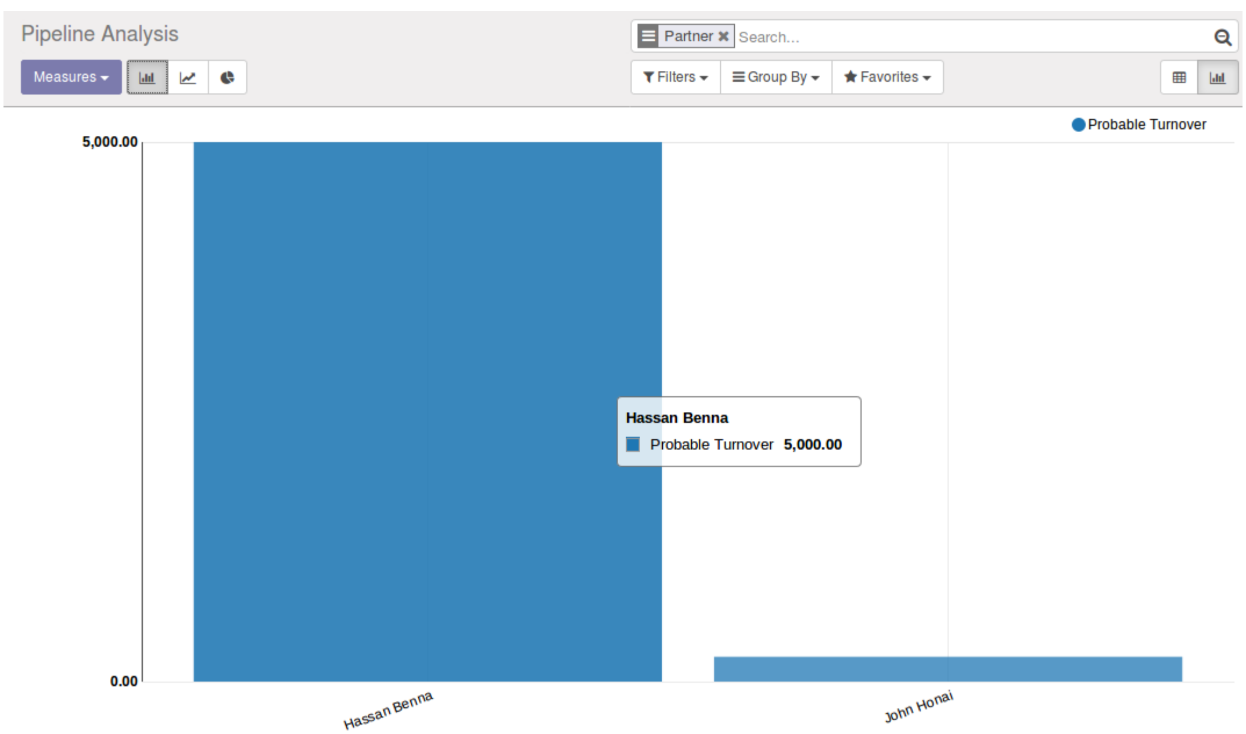
We can access several types of reports in Odoo. It is possible to analyze the Leads and Opportunities based on team, salesperson, state, etc.

- **Sales -> Reports**



Exapmle:-


Pipeline Analysis
Partner
Search...
Measures
Filters
Group By
Favorites
Salesperson
Sales Team
City
Country
Stage
Creation Month
Expected Closing
Conversion Date
Lost Reason
Partner
Add custom group
Hassan Benna
John Honai
John Honai
Hassan Benna


Pipeline Analysis
Partner
Search...
Measures
Filters
Group By
Favorites
Probable Turnover
5,000.00
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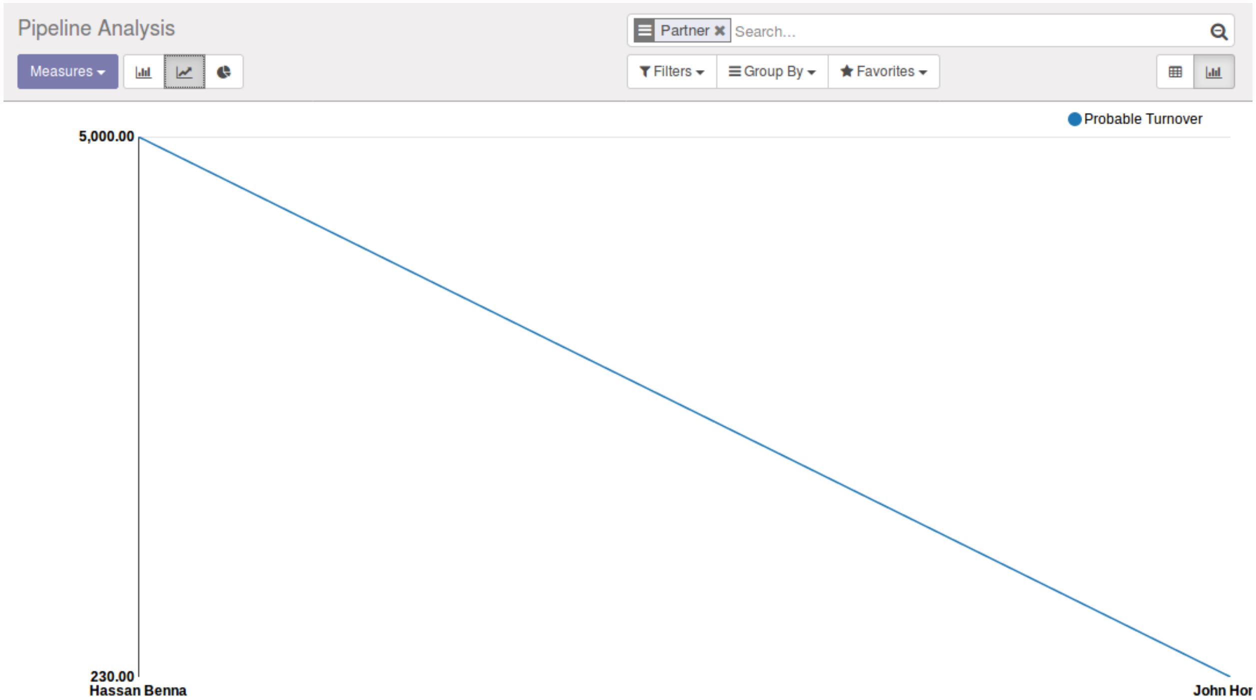
Hassan Benna
Probable Turnover 5,000.00
Hassan Benna
John Honai



Other Useful Settings

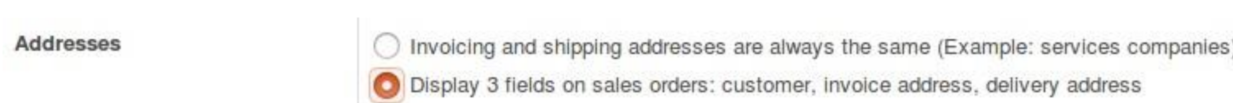
Order Upsell

- **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

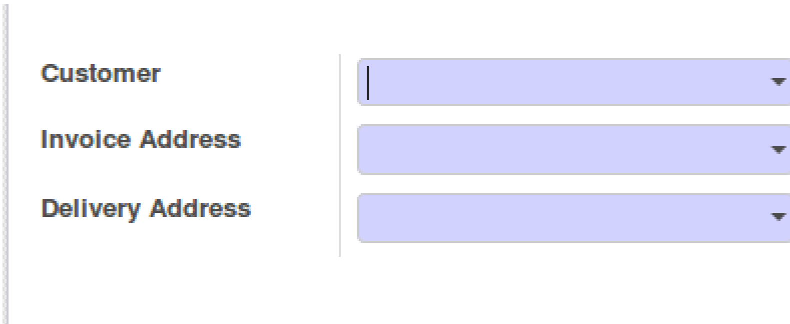
If we need to have three different addresses for customer, delivery and invoice, we need to enable this option from

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



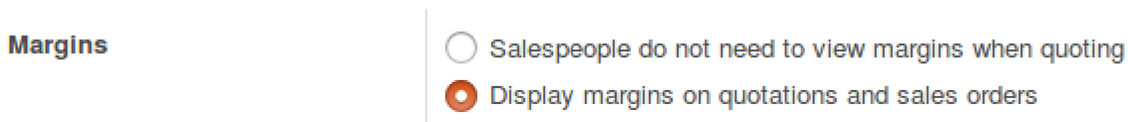
After enabling this option, we can see the new fields appeared for entering these addresses.

These addresses will be displayed in the reports also.



Setting up margin for Sales

- **Sales -> Configuration ->Settings -> Margin**

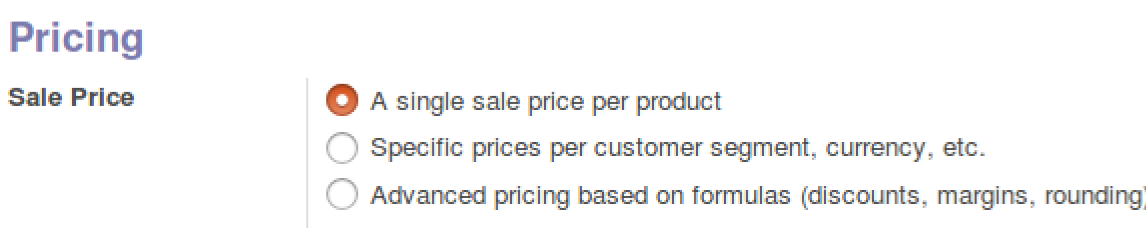


After it is enabled, we can see margin option in sale order.

Setting Up Sales Pricelists

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

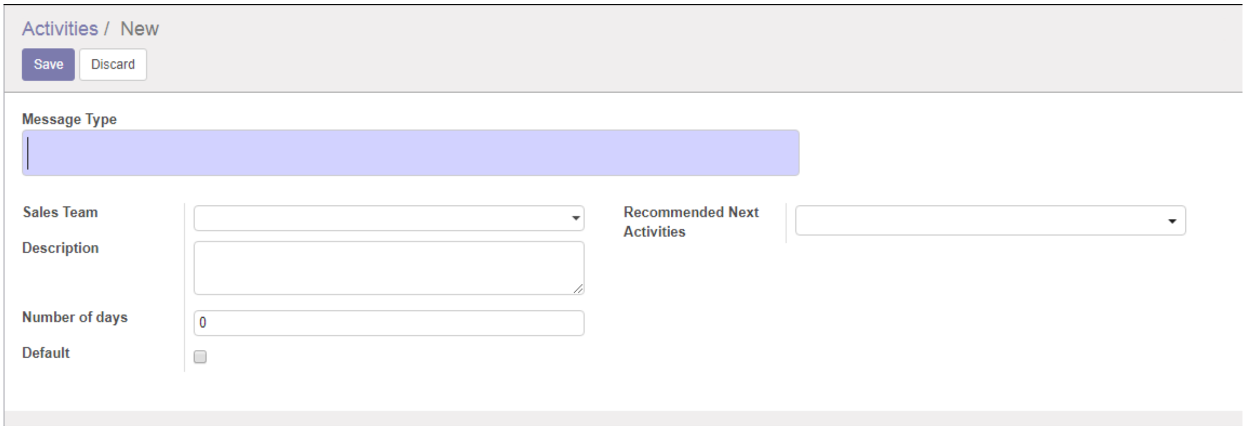
- **Sales -> Configuration -> Settings -> Pricing**



- 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

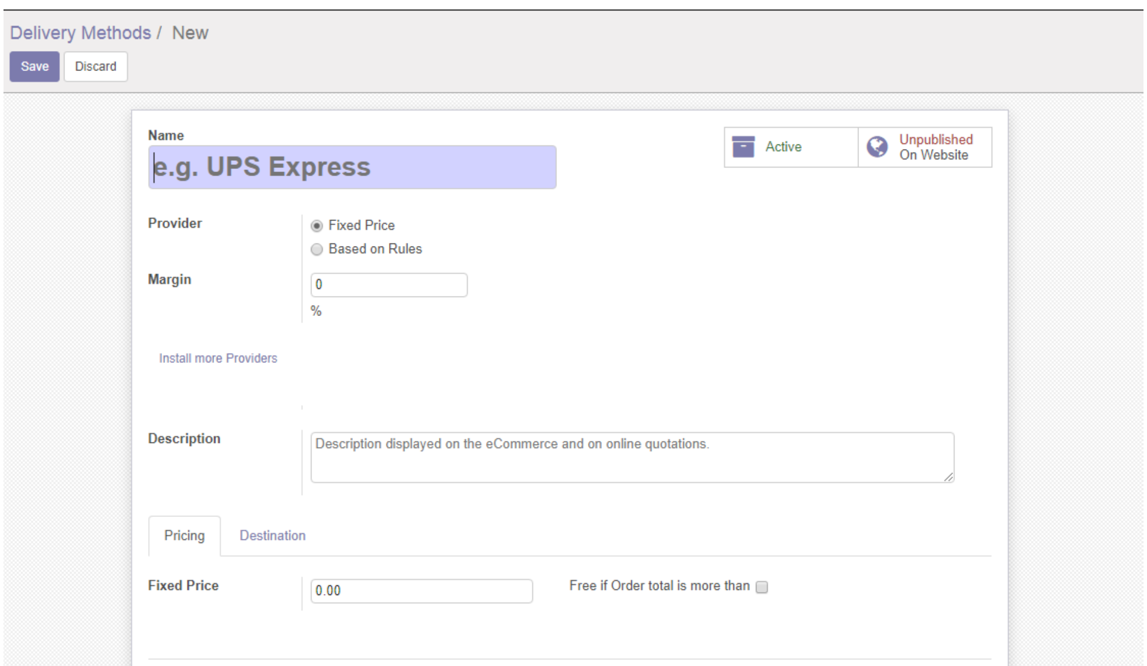
- **Sales -> Configuration -> Leads and Opportunities -> Activities ->Create**



- Fill the fields and **<Save>**

Setup Delivery Method

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



- 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.

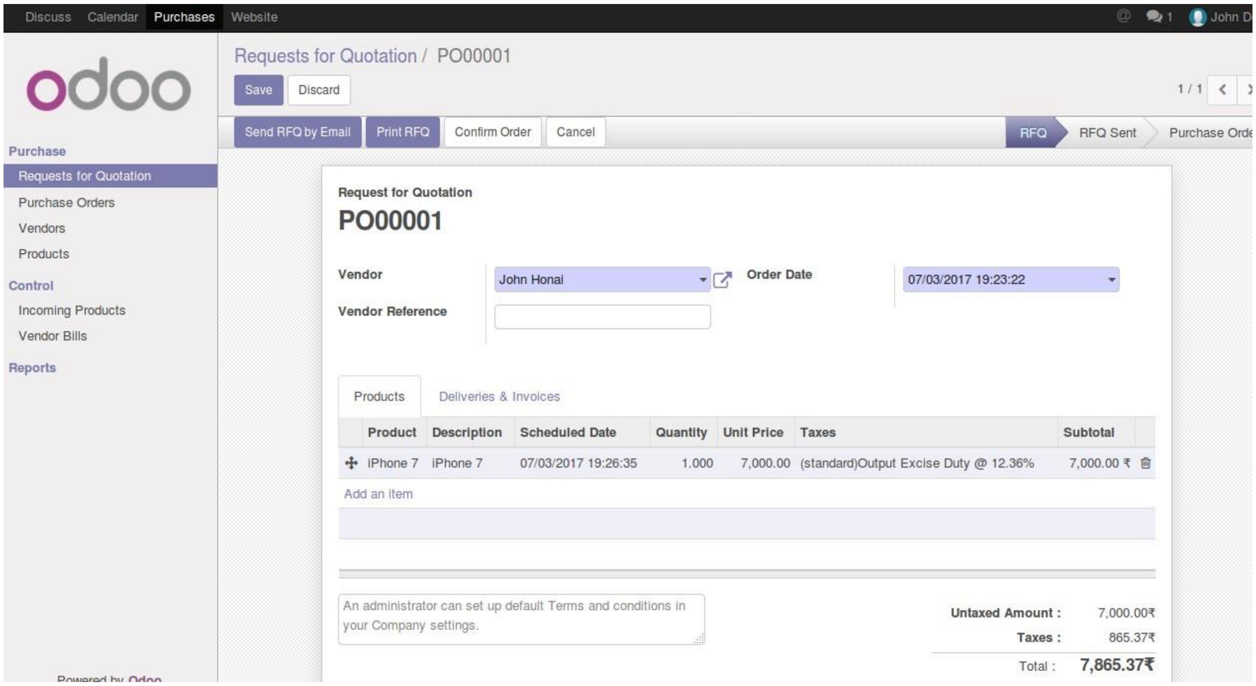
Purchase process starts from the purchase order and ends with the reception of good/service. In Odoo you can either directly create a purchase order (PO) or you can request for a quotation and create PO only after verifying the quote by the vendor. You can choose to go for Purchase Tender in case of 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

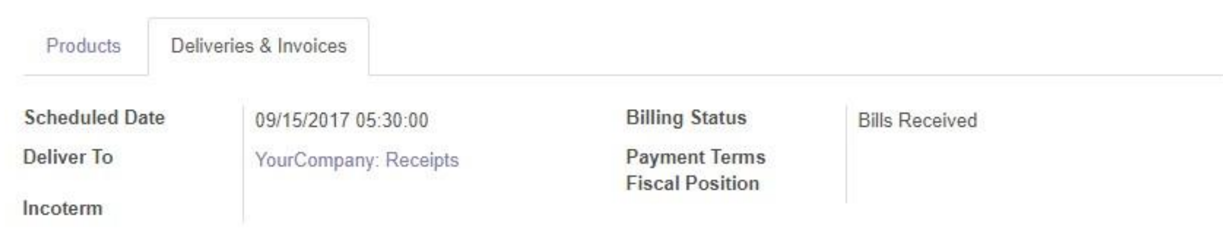
The quotation contains the details of the products which we want to purchase from our suppliers.

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



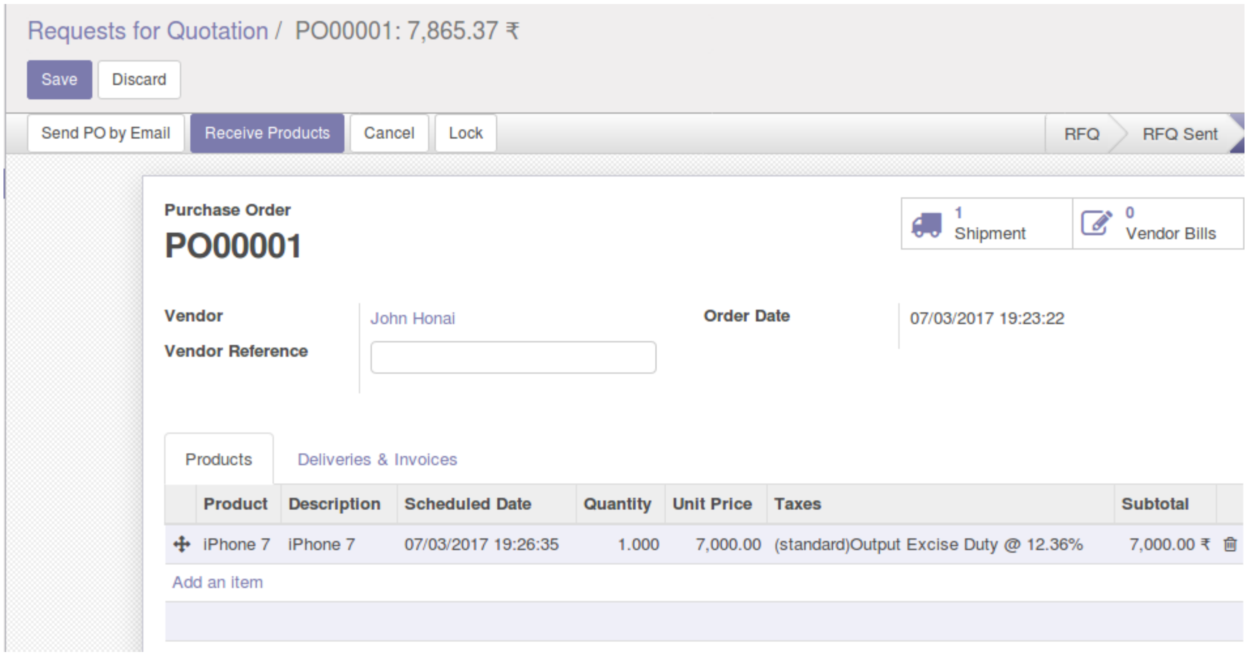
- Select the **Supplier/Vendor**.
- The order date will be filled automatically, when we create the document.
- The scheduled date in order line specifies that when should we receive the products.

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



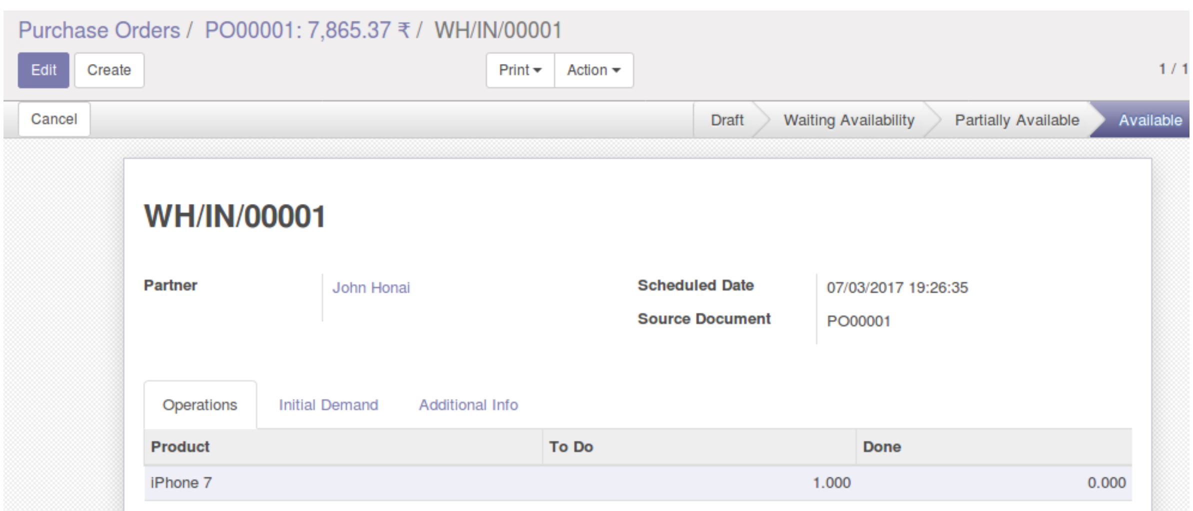
Deliver To: Indicate delivery location (To know more about location refer inventory)

- Click Confirm Order to create new Purchase Order



Click the **'Receive Products'** button,

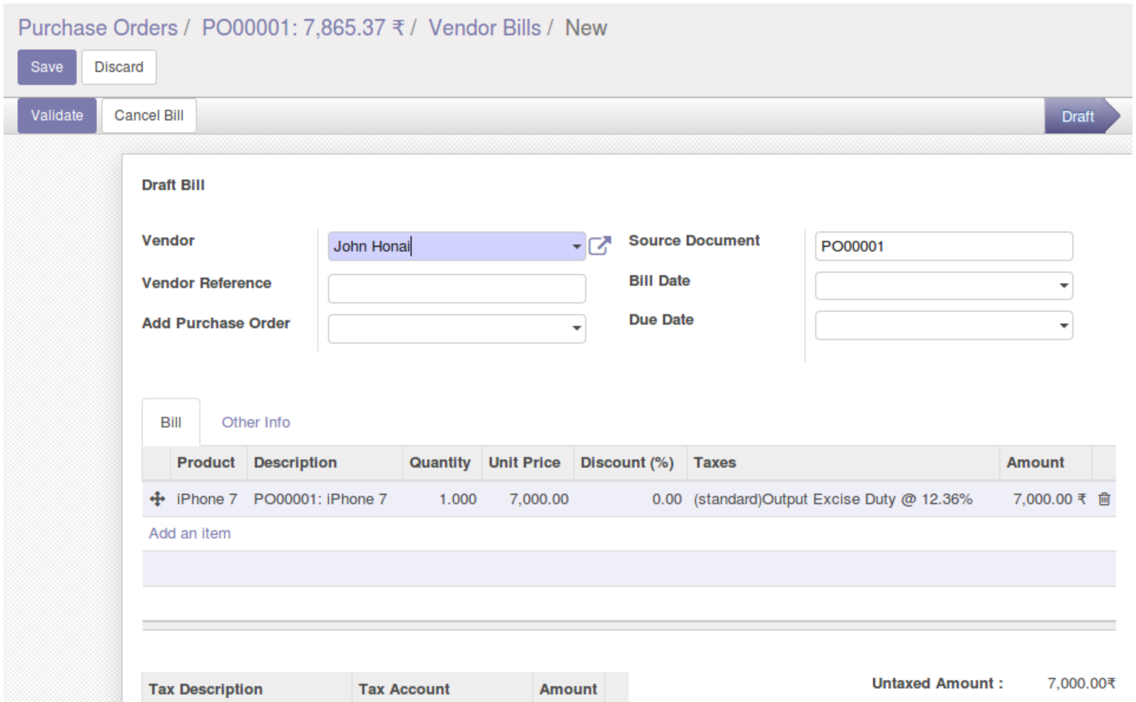
- For receiving the products, the user must be an Inventory Manager.
- The same process can be done via Inventory module too. All the Purchase orders will be listed in inventory section.
- You can view the Shipment status from "Shipments" button



Vendor Bill

To create a Bill corresponding to a sale order

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

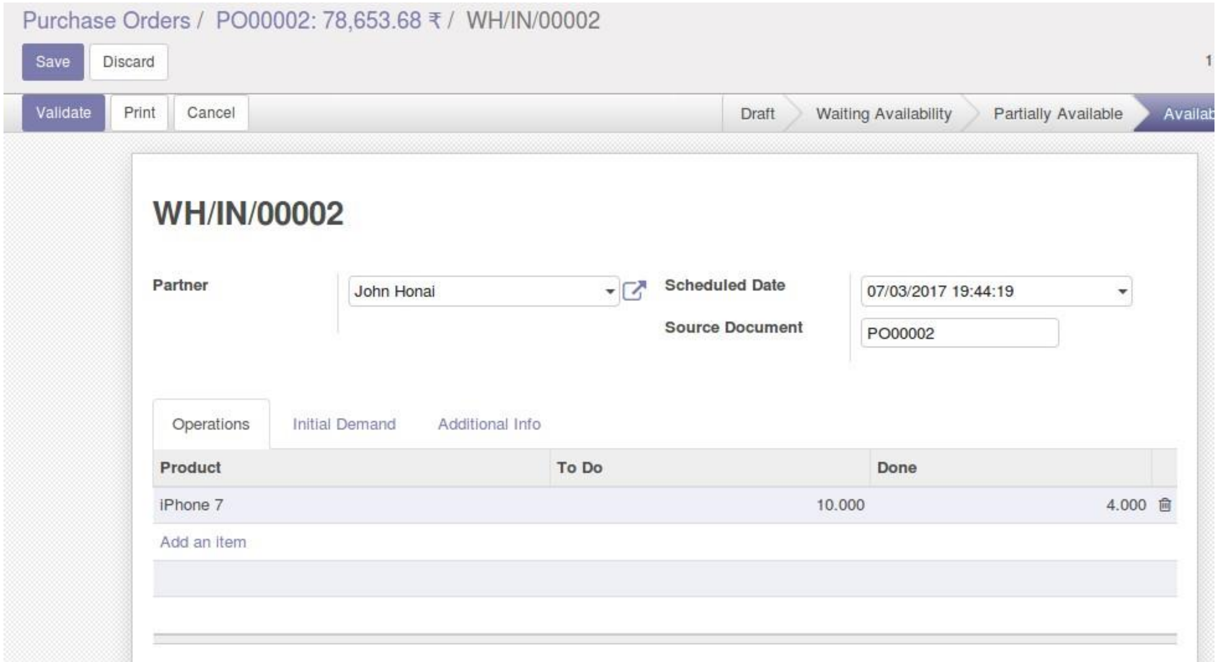


- Choose vendor and sale order from drop down list.
- The bill undergoes three stages namely ‘Draft’, ‘open’, ‘Paid’ for better control over the bill. Admin can set different user to validate those stages

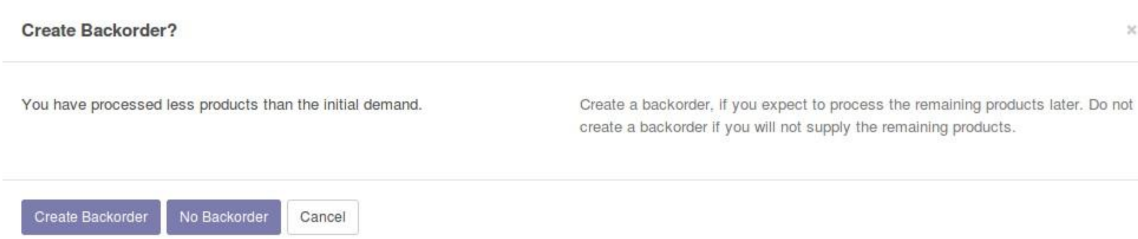
Creating Backorder

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>**

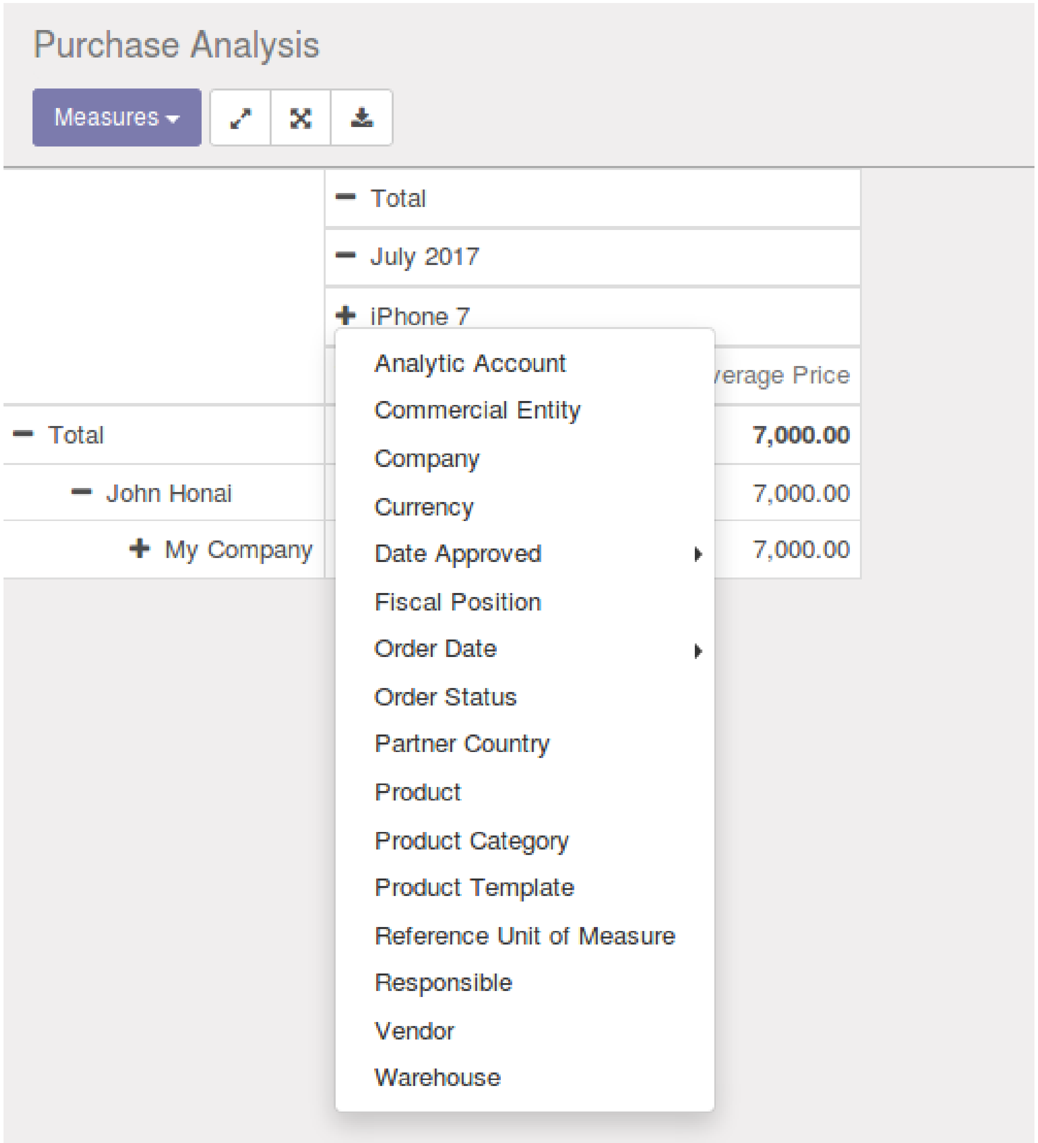


- In the 'Done' column, we can enter the number of products which we need to receive this time. If you enter less number of products than in the form then a wizard will appear asking you to confirm creating the backorder.



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.



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

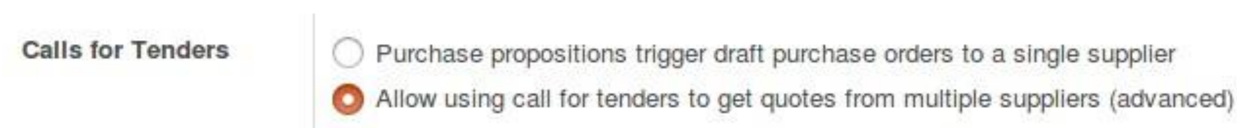
To Purchase any product, we must create a product in our system. Though it is an activity done under inventory management, Oddo Purchase module provide a quick link under **Purchase > Products** tab to perform product management functions like Add Product Update Stock etc. To see the full functionality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



- Select the call for tender's option.

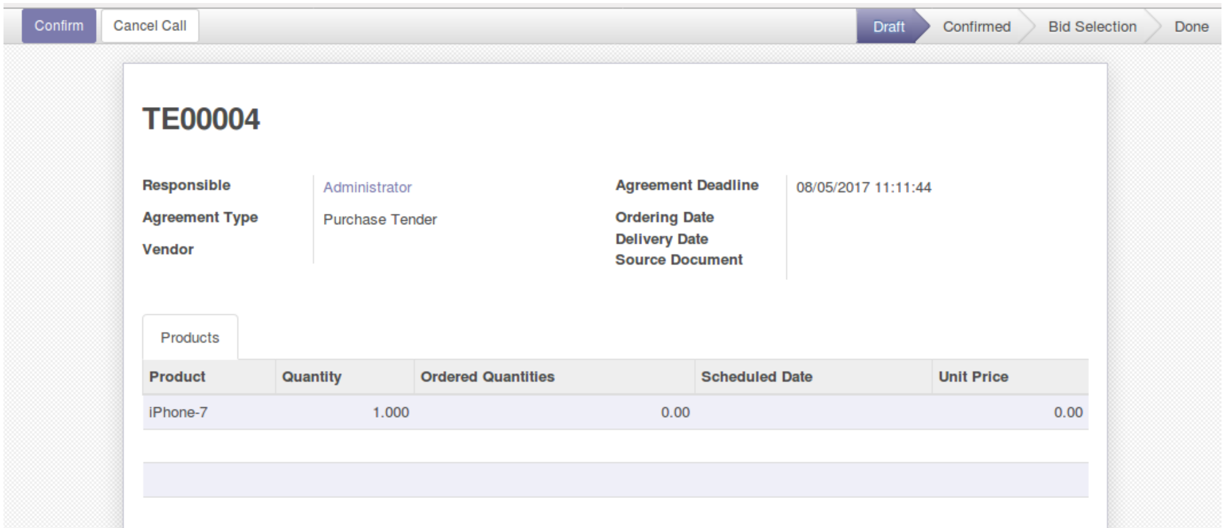
After this option is enabled, we can see two new menu items,

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

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

Create Purchase Tender

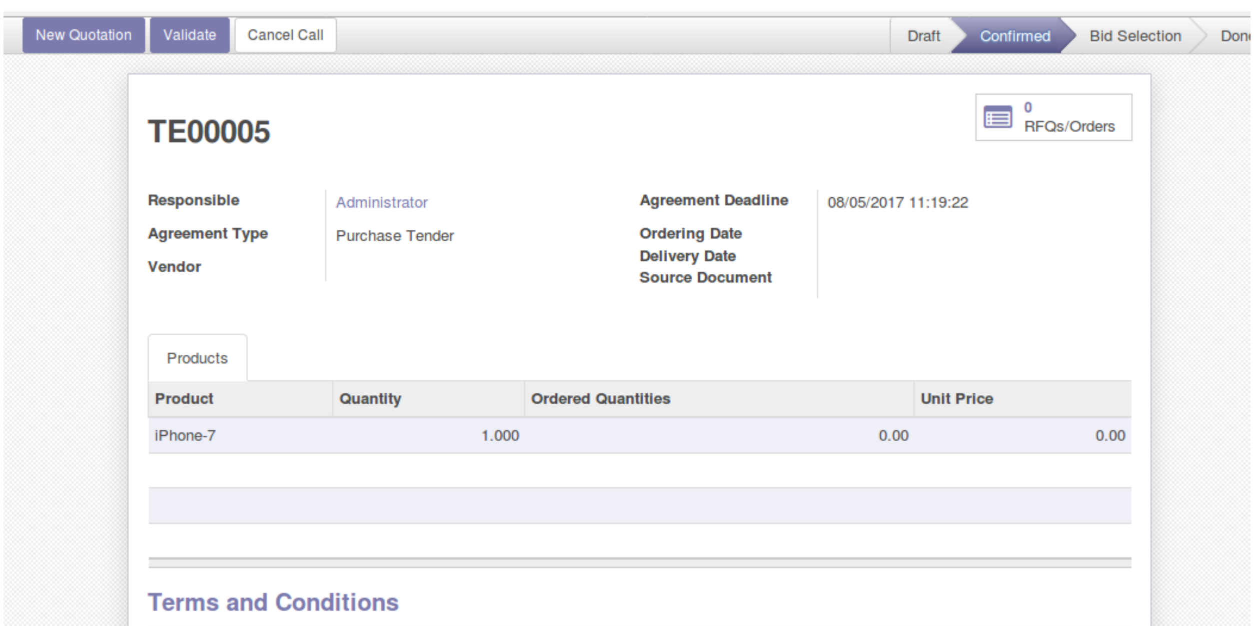
- **Purchase -> Purchase Agreements -> Create**



- 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

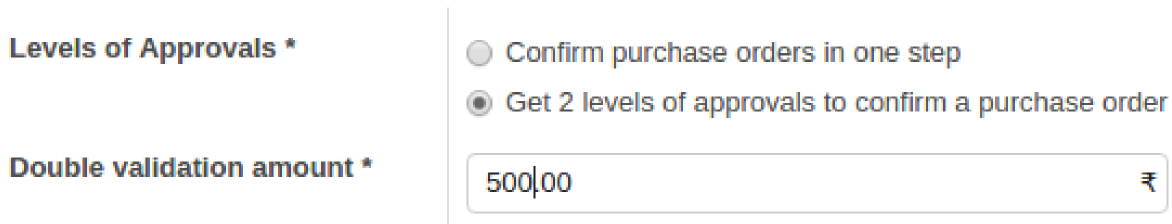
Now we can see some buttons appeared, new quotation, validate and RFQ/Orders.



- 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.



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 that 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.

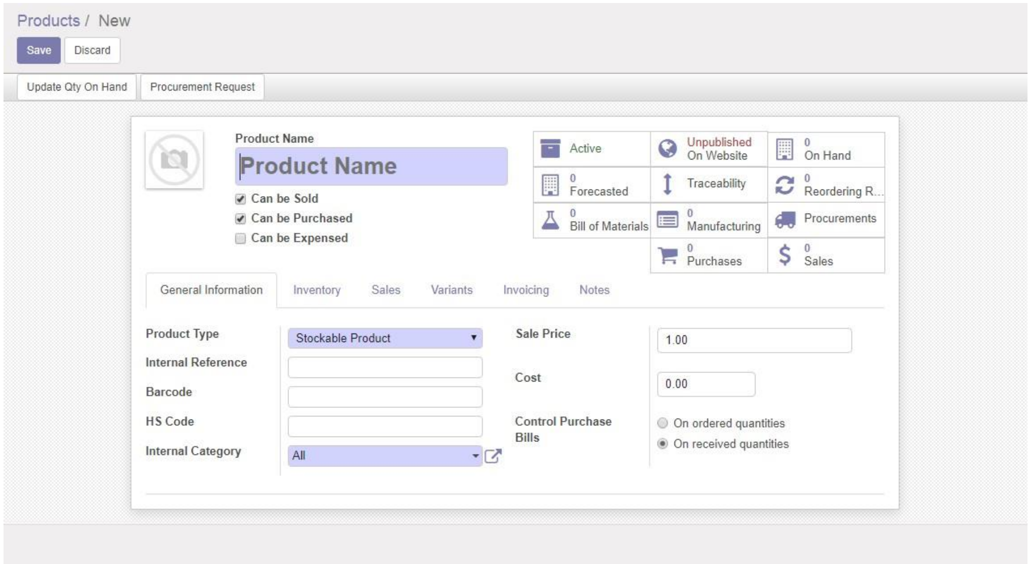
Put away Strategies: the strategy to use to decide in which location a specific product should be set when arriving somewhere. (Example: cables goes in rack 3, storage A)

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

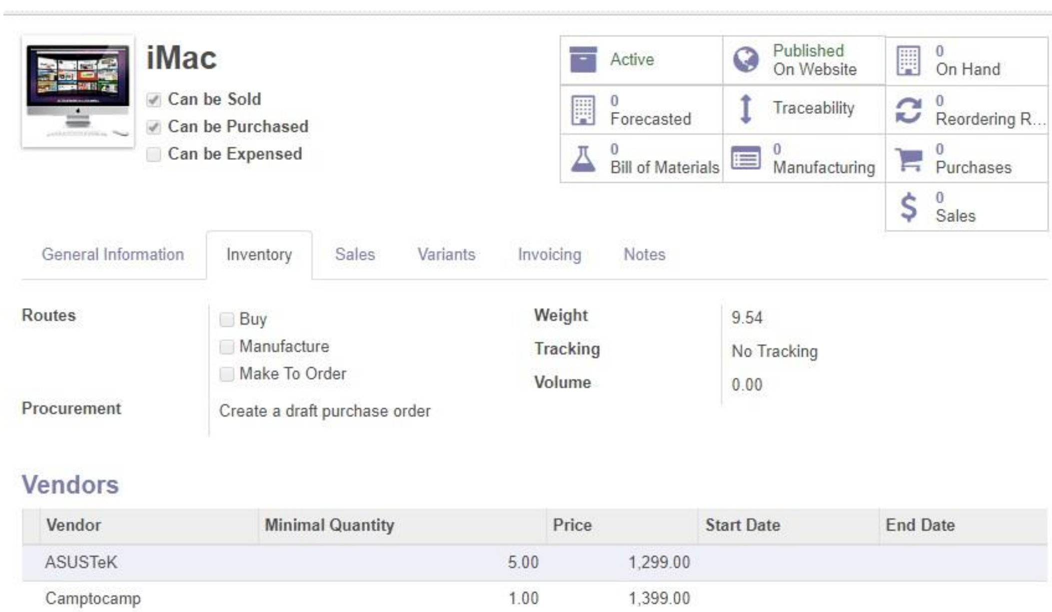
- **Inventory > Inventory control > Product > Create**



All the fields under this form is very important

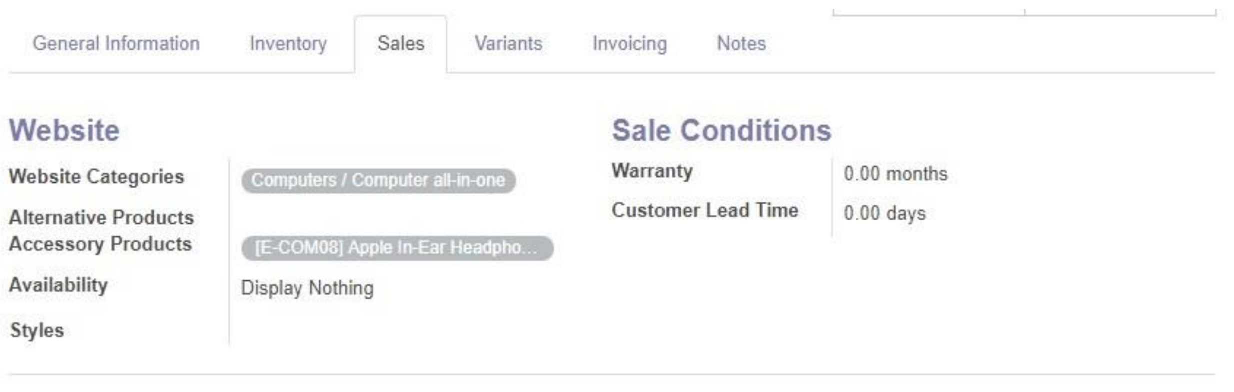
- **Can be sold ->** Tick this and the product will be listed in sales
- **Can be Purchased ->** tick this and the product will be listed in purchase
- **Can be Expensed ->** if the product is for Internal usage
- **Product type ->** whether the product is **Stackable**, **Consumable**, or **Service**

Fields Under inventory Tab



- **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

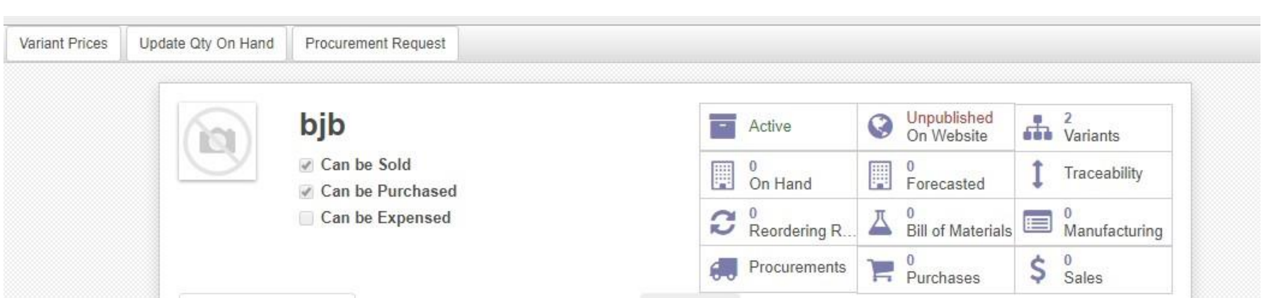


Website Categories: - here you can specify the category under which the product should be displayed in E-commerce website
Alternative/Accessory Product: - associated product to list in Website

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".



Like this

	Internal Reference	Name	Attributes	Sale Price	Quantity On Hand	Forecast Quantity	Barcode
		bjb	Memory: 16 GB	1.00	0.000	0.000	
		bjb	Memory: 32 GB	1.00	0.000	0.000	

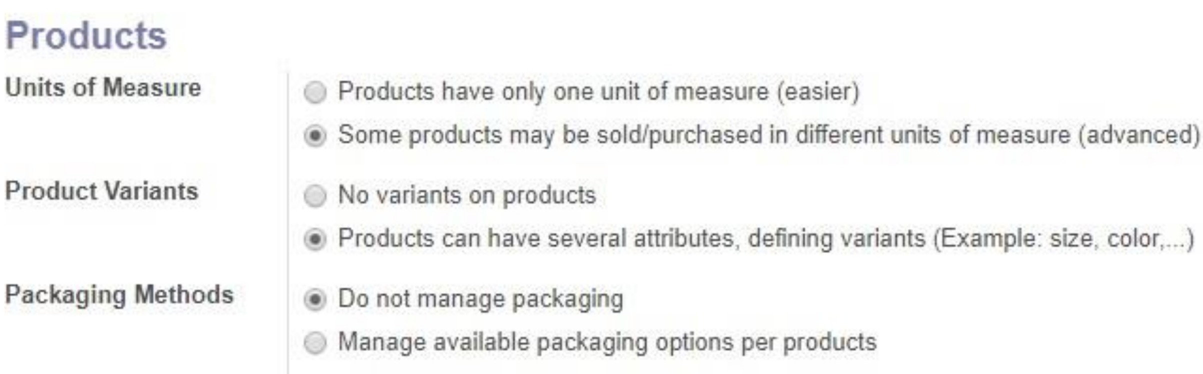
- You may delete any variant you don't have.
- Follow Variant Price tab to adjust prices of all variants

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

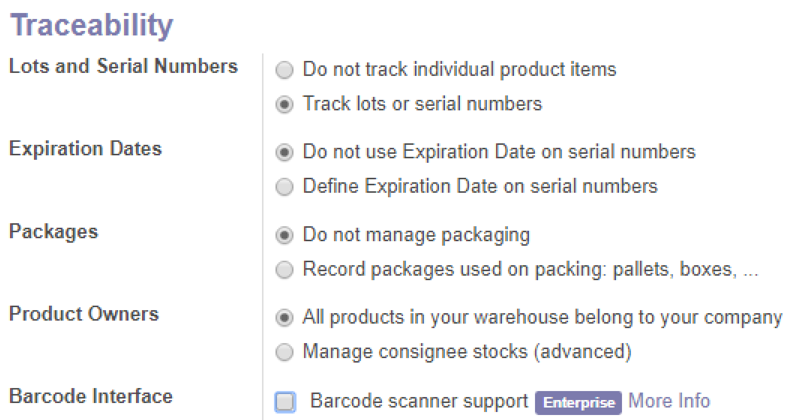
- **Inventory> Configuration> Settings> Products**



➢ **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.

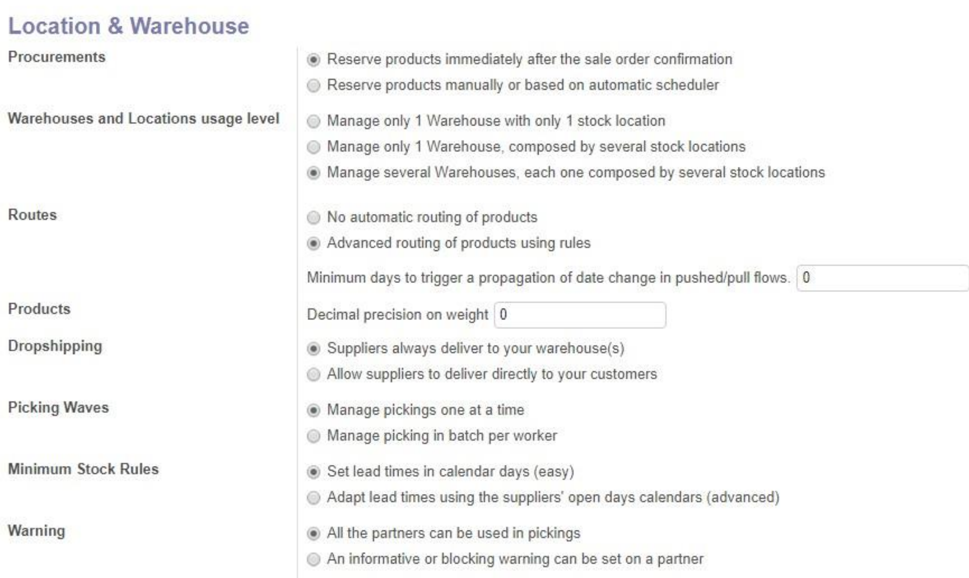
➢ **Product Variant: -** Tick here to include product variance in inventory.

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



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

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



➢ **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

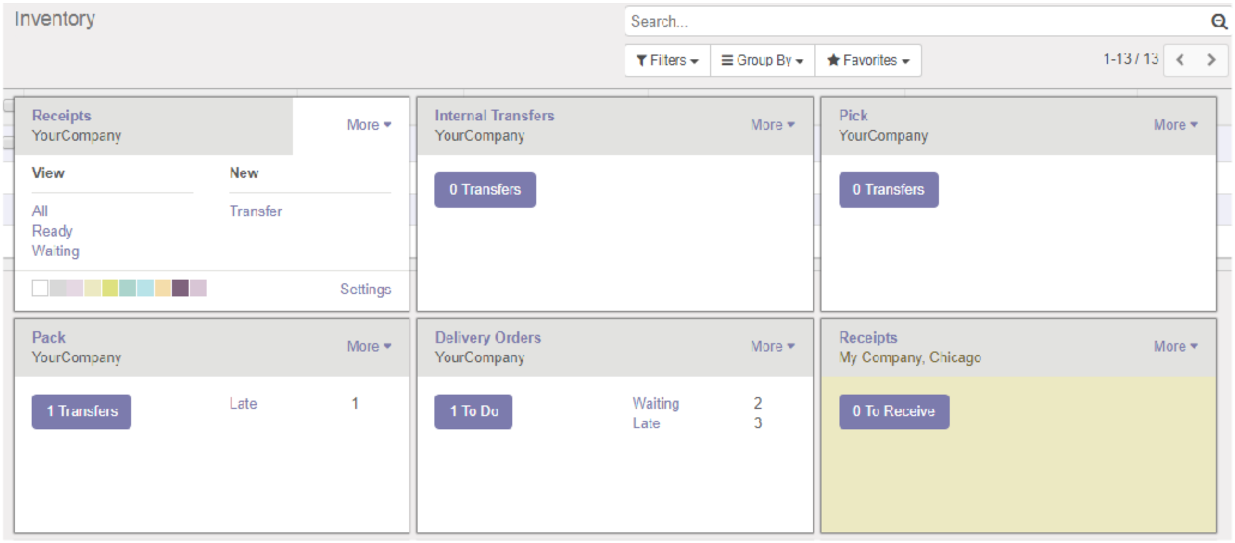
➢ **Warehouses and Location level: -** Choose according to your usage level

➢ **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.

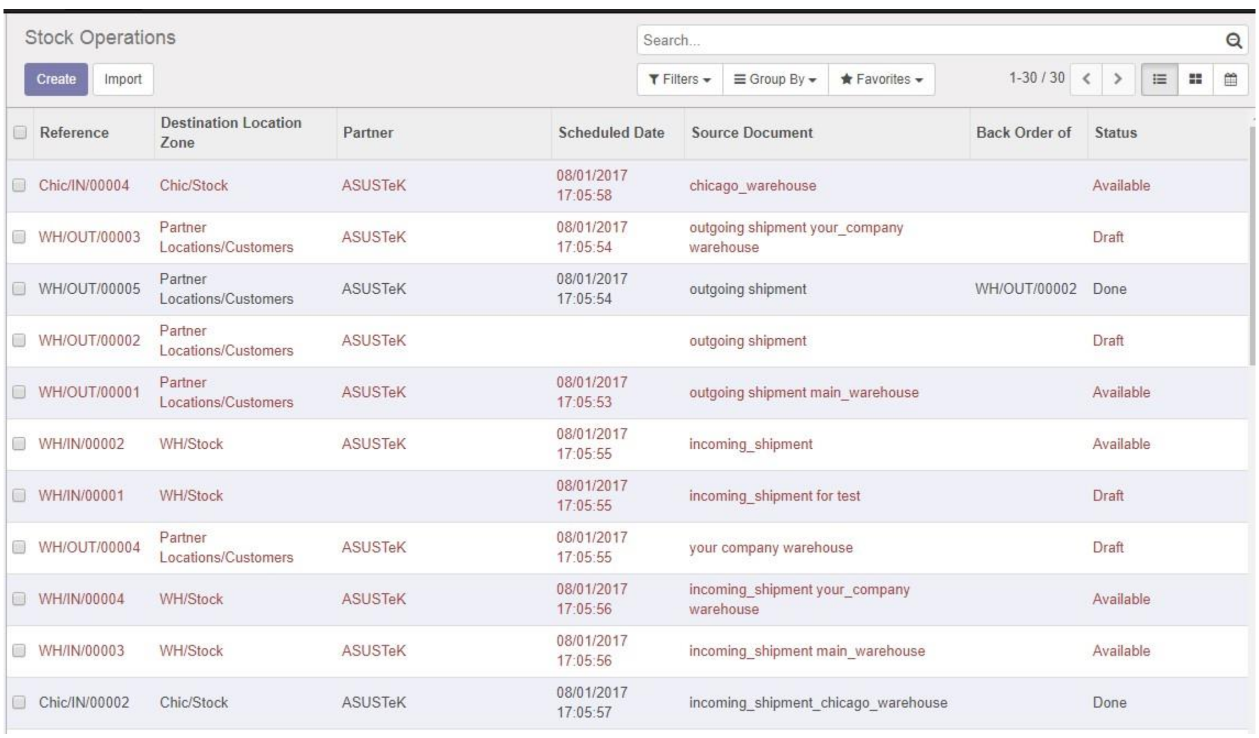
Dashboard

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



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

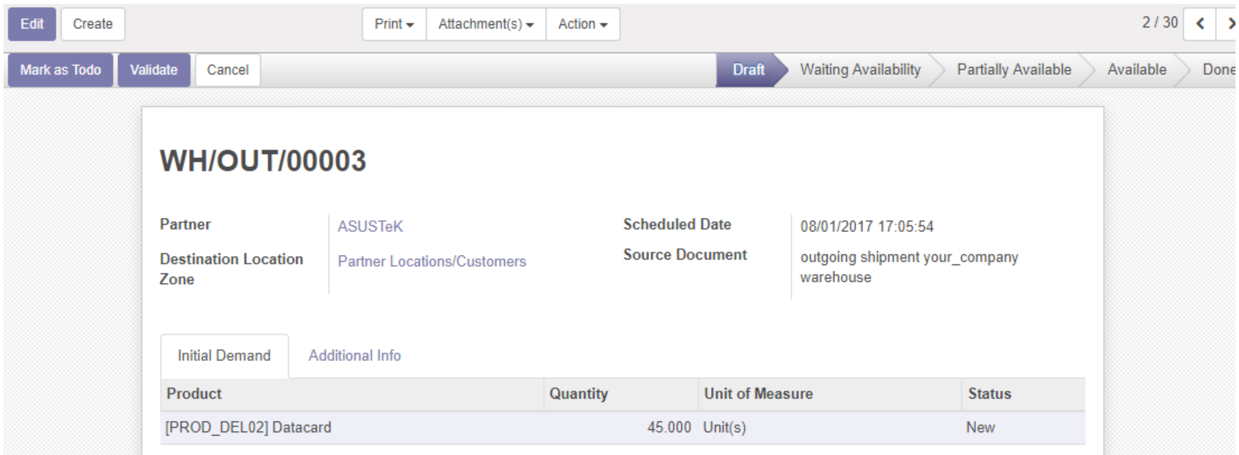
Inventory -> Operations -> All Transfers



Stock Operations

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

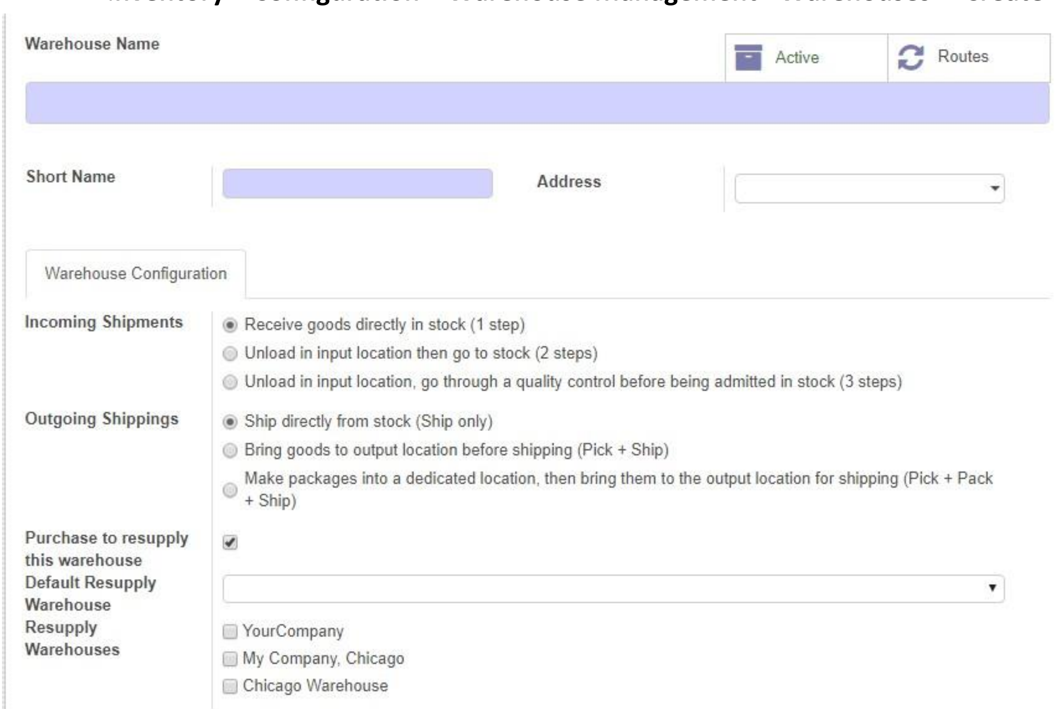
- You can see all confirmed Sales and Purchase orders listed here.
- You can click and view the status of each one.



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**



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

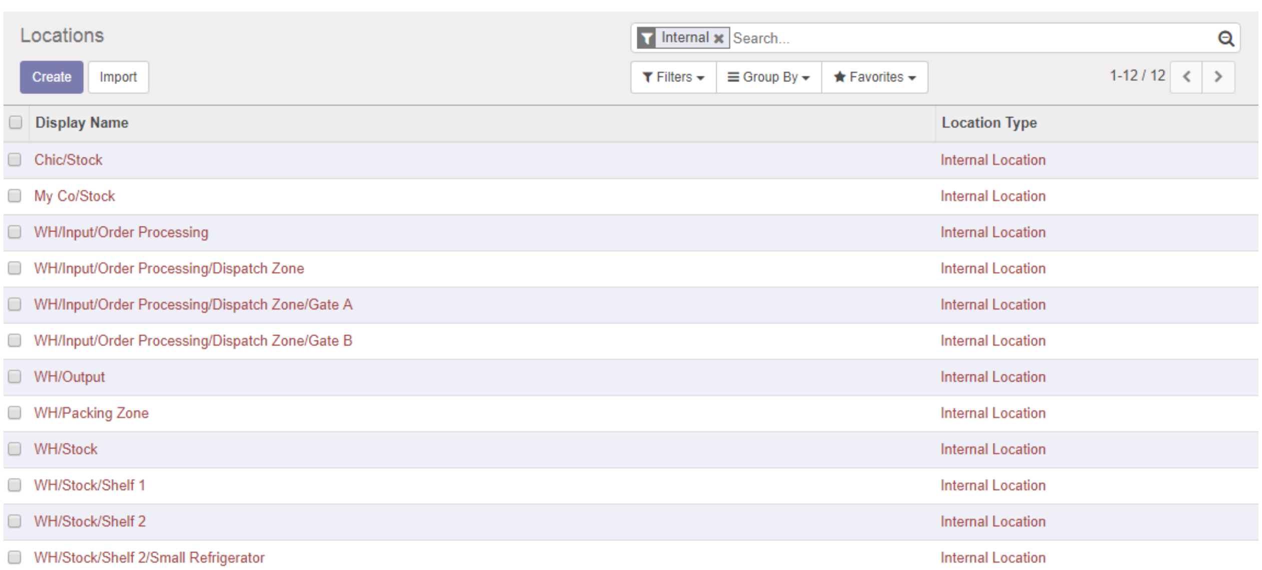
Locations are different places in your ware house. Or these are the different sections in your ware house were different types of actions are done. You can add single or multiple locations. A location means a space in the warehouse, a shelf, a floor, etc. A location is part of one warehouse and it is 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 indicate 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 you company from

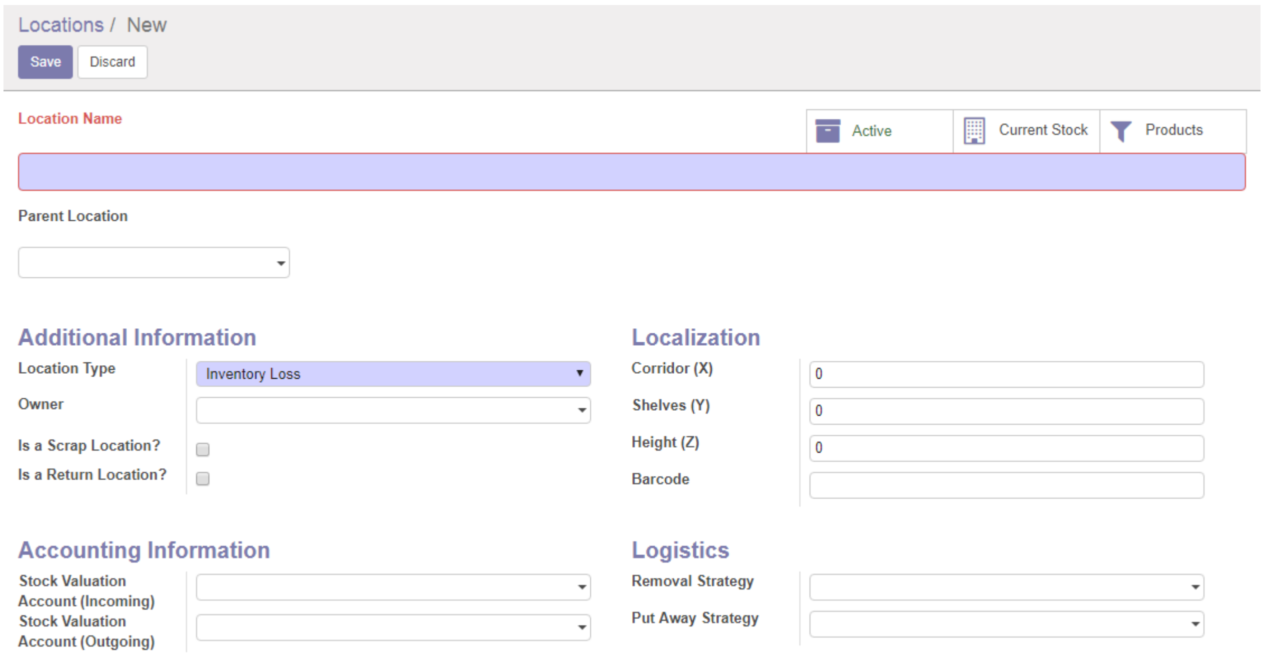
- **Inventory -> Configurations -> Locations**



Display Name	Location Type
Chic/Stock	Internal Location
My Co/Stock	Internal Location
WH/Input/Order Processing	Internal Location
WH/Input/Order Processing/Dispatch Zone	Internal Location
WH/Input/Order Processing/Dispatch Zone/Gate A	Internal Location
WH/Input/Order Processing/Dispatch Zone/Gate B	Internal Location
WH/Output	Internal Location
WH/Packing Zone	Internal Location
WH/Stock	Internal Location
WH/Stock/Shelf 1	Internal Location
WH/Stock/Shelf 2	Internal Location
WH/Stock/Shelf 2/Small Refrigerator	Internal Location

Create a Location

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



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

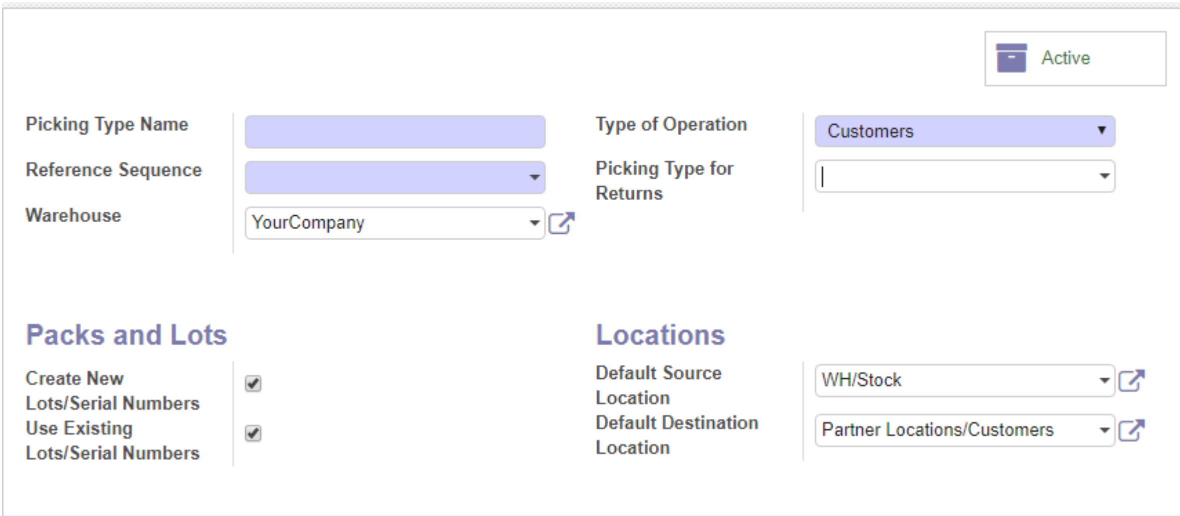
- Fill all other necessary fields and click **<Active>** and **<Save>**

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**



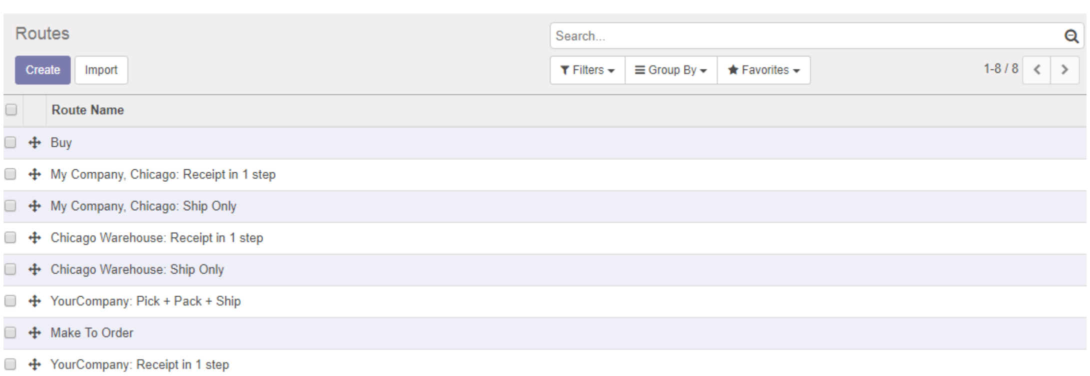
- Fill the operation details and click **<Activate>** and <**Save>** now these operation will be listed in your Dashboard.

Routes

it is the different possible ways through which a product is acquired or sold from your ware house. 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.

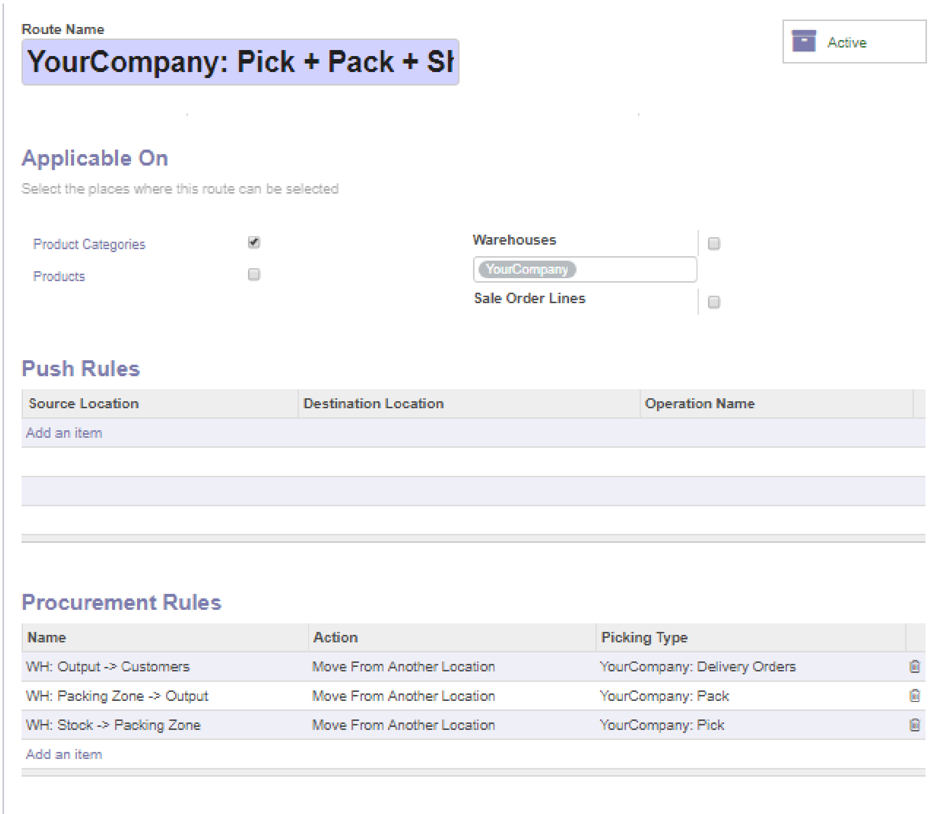
You can view all the Routes from

- **Inventory > Configuration > Routes**

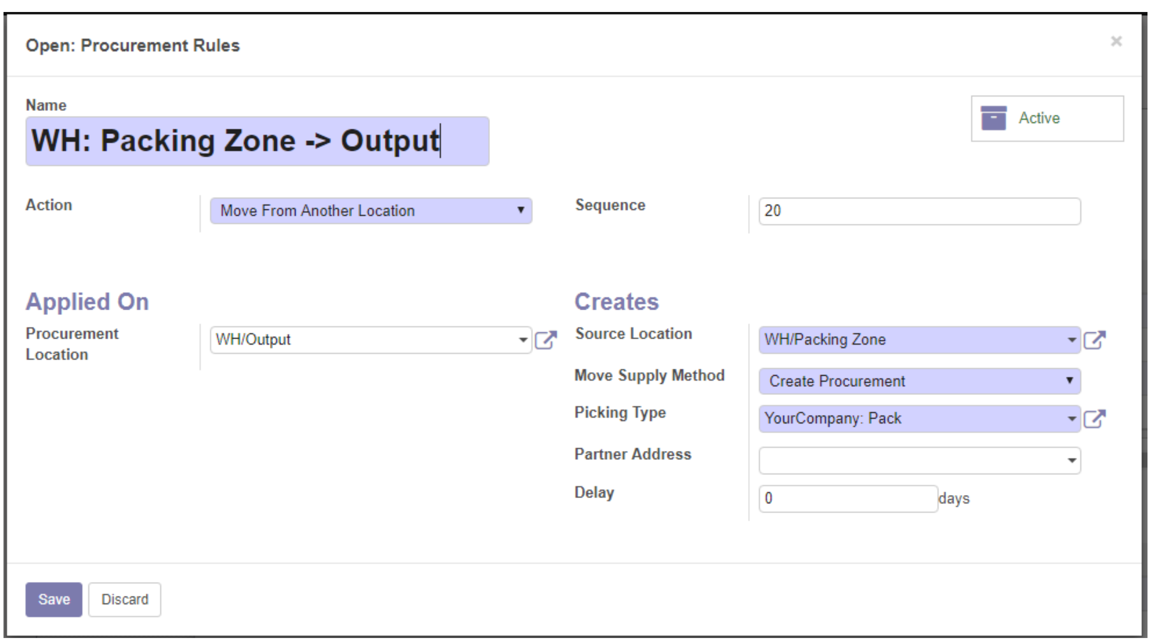


You may define new Rout rules from

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

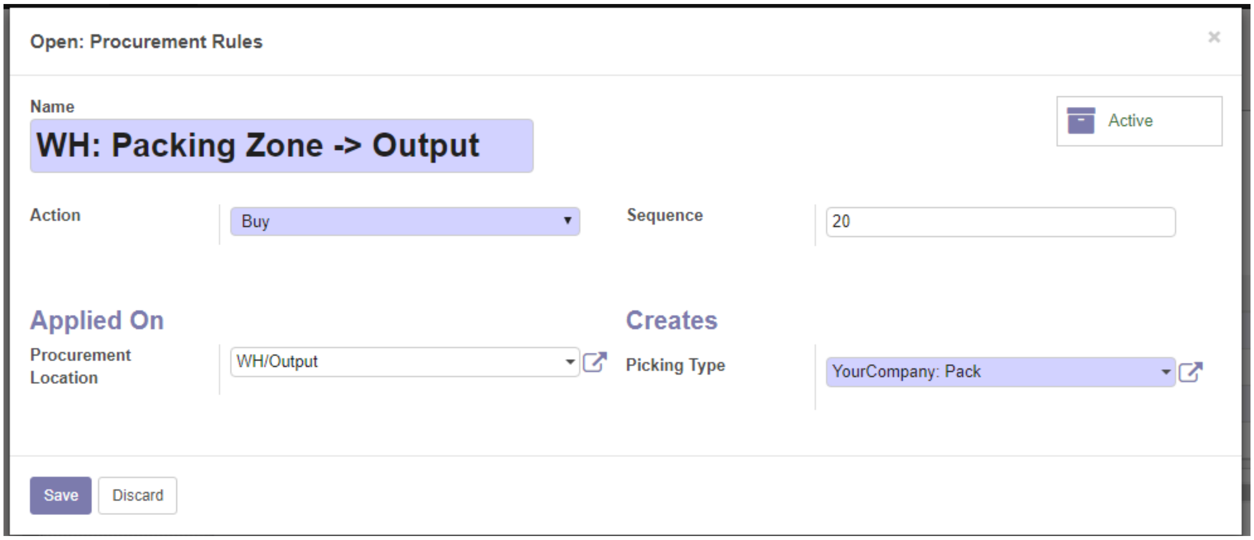


- Tick **Product categories** to view the Rule in Product category also
- Choose the Ware house
- Click **Add an Item** to add new Rule.



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**

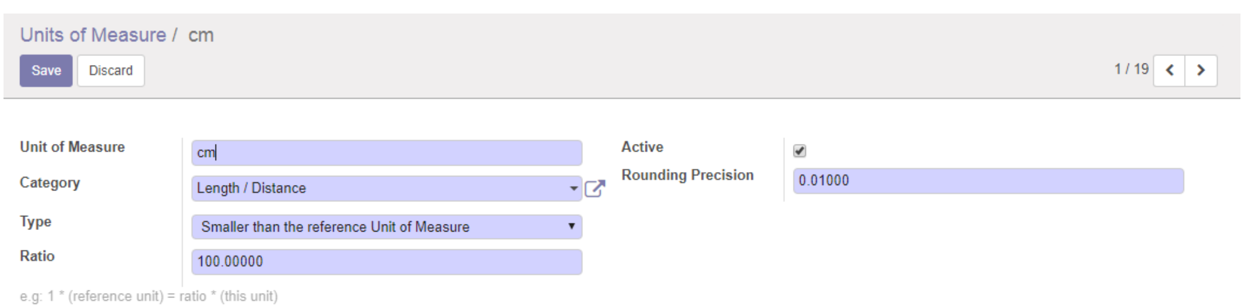


- Save the Rule and add another Rule if needed. Otherwise click **<active>** and **<save>** Route.

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**



- ➢ **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

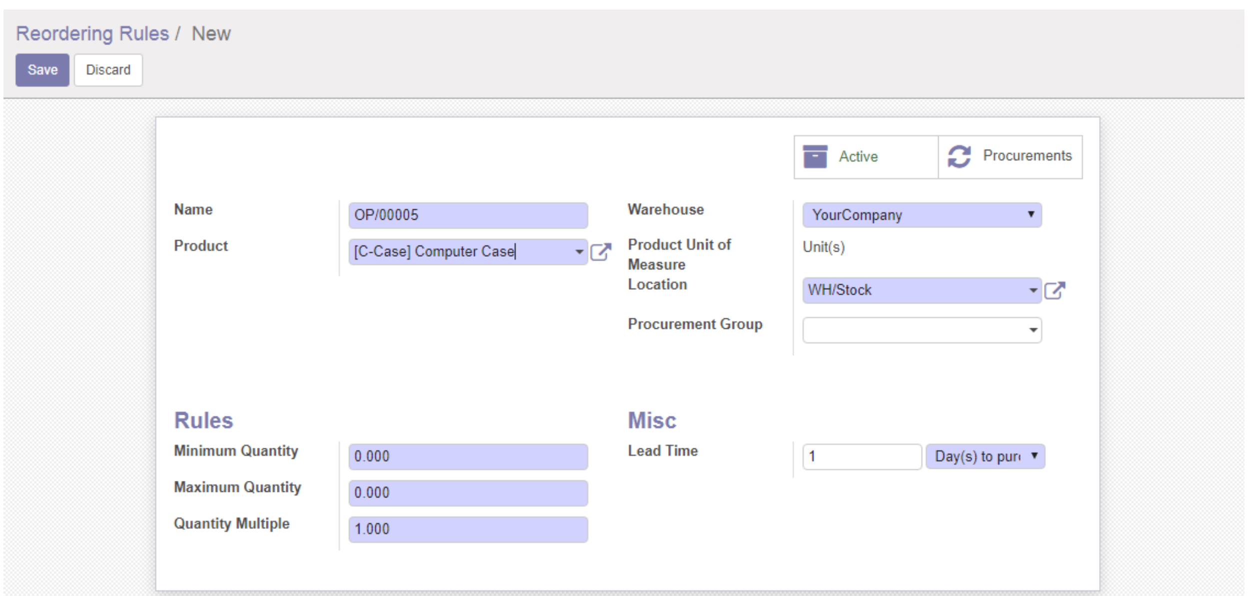
Smaller than reference unit- opposite of the above

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

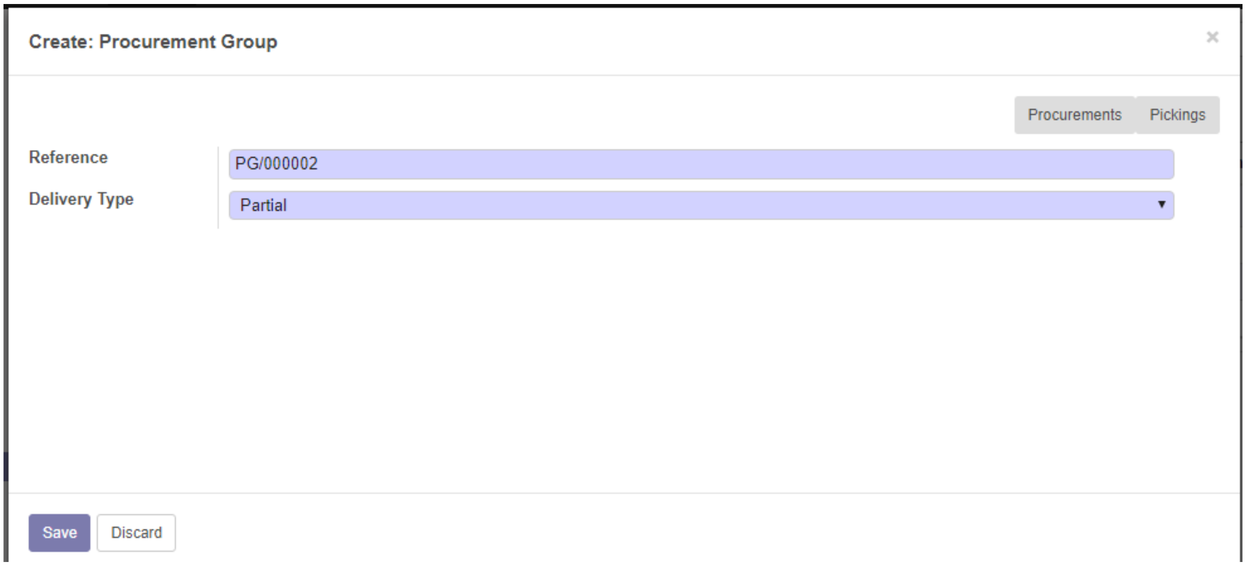
Reordering Rules

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**



➢ **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

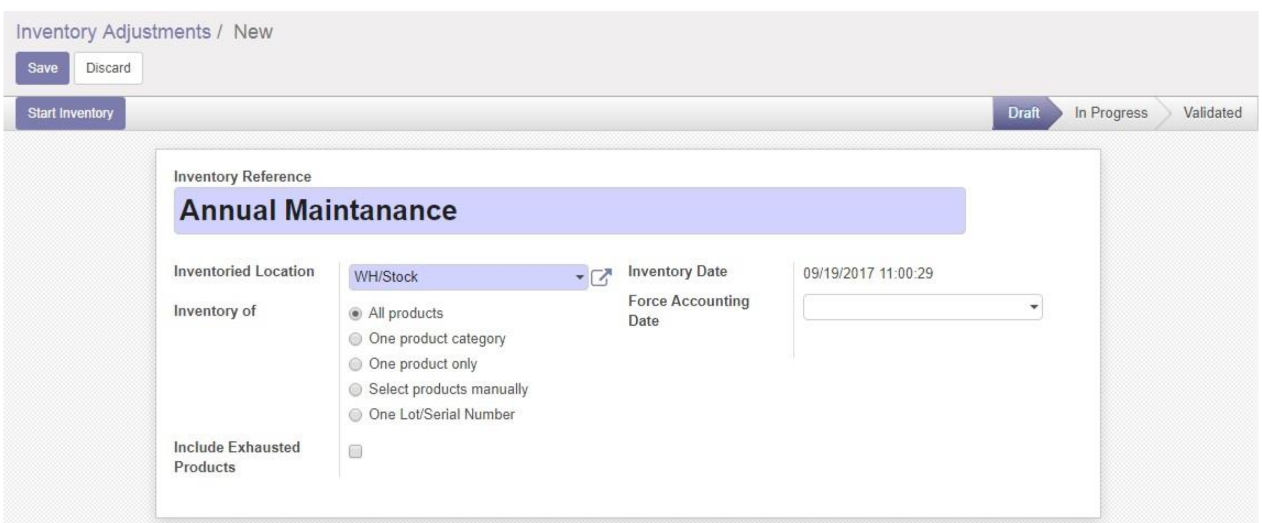


- **Activate** and **Save** the Rule.

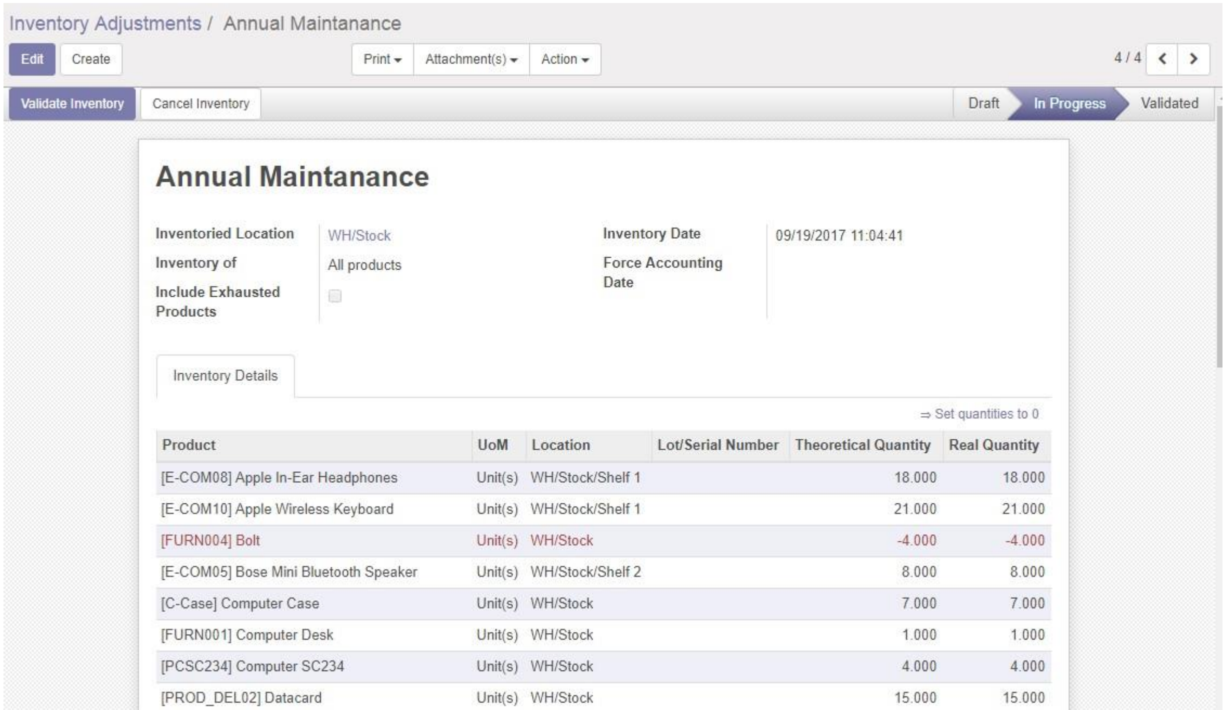
Inventory Update

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**



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

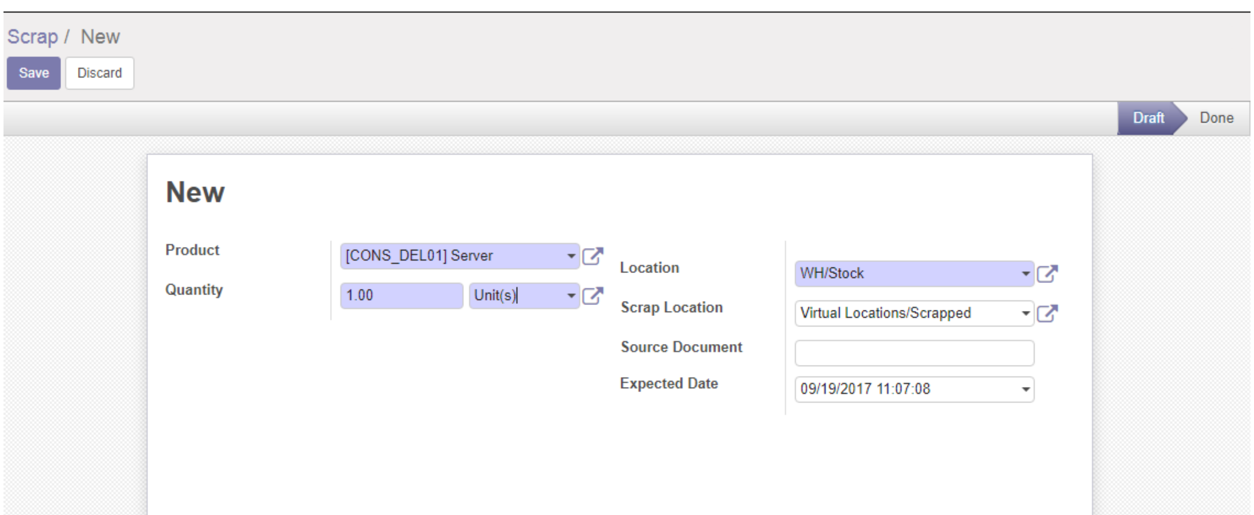


- You can change the stock details by clicking over the product quantity.
- Commits the changes and click **<Validate>**

Scrap

To record the scrap products in your inventory.

- **Inventory > Inventory Control > Scrap > Create**

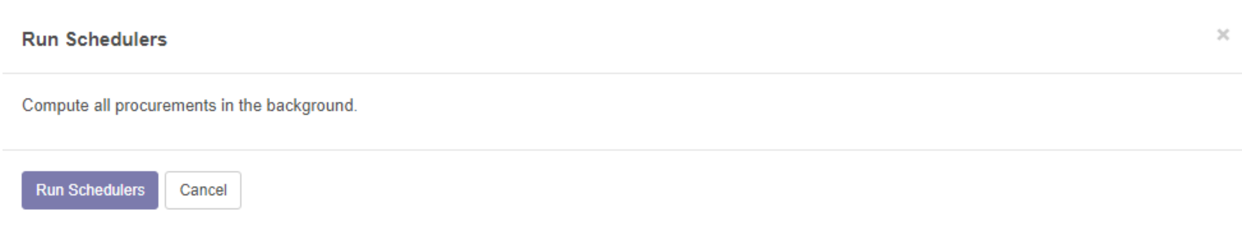


- Fill the Scrap product details and **Save**

Scheduler

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

- **Scheduler > Run Scheduler**

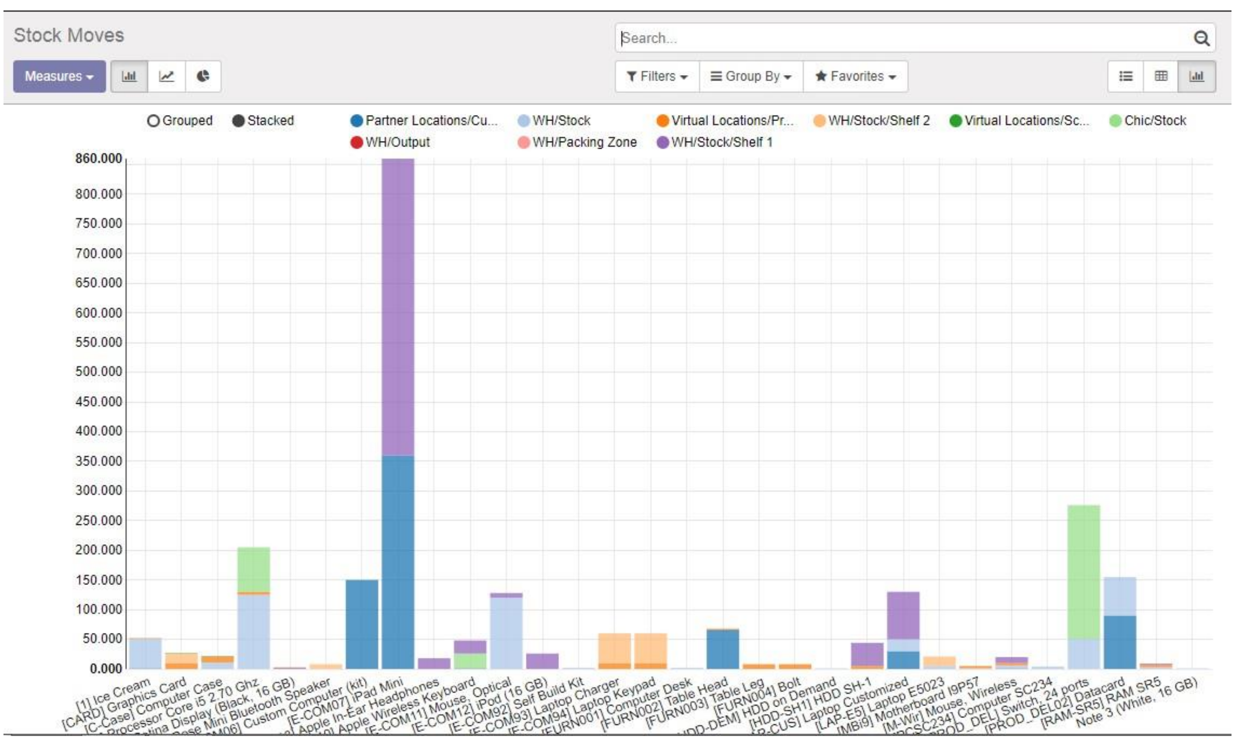


- Click **Run Scheduler**

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.

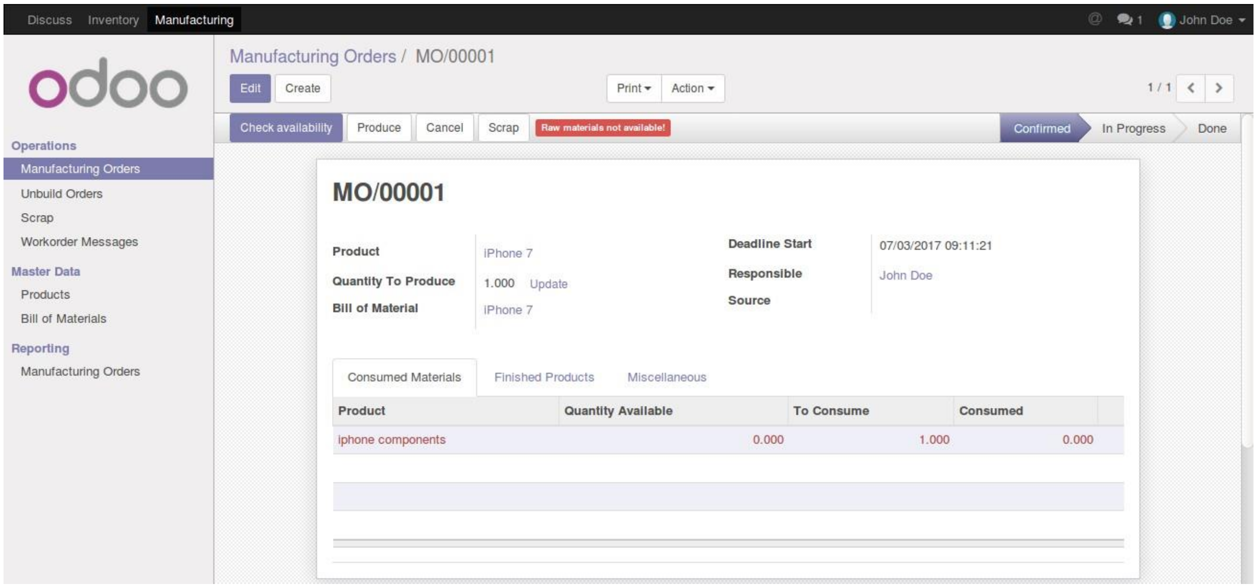
- **Manager: -** He is the one who manages everything, including Crete BOM, Work Order, Routing procedure etc.
- **User: -** Generally he can create a manufacturing order and process it. But manager can grant more permission to this user if needed.

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**



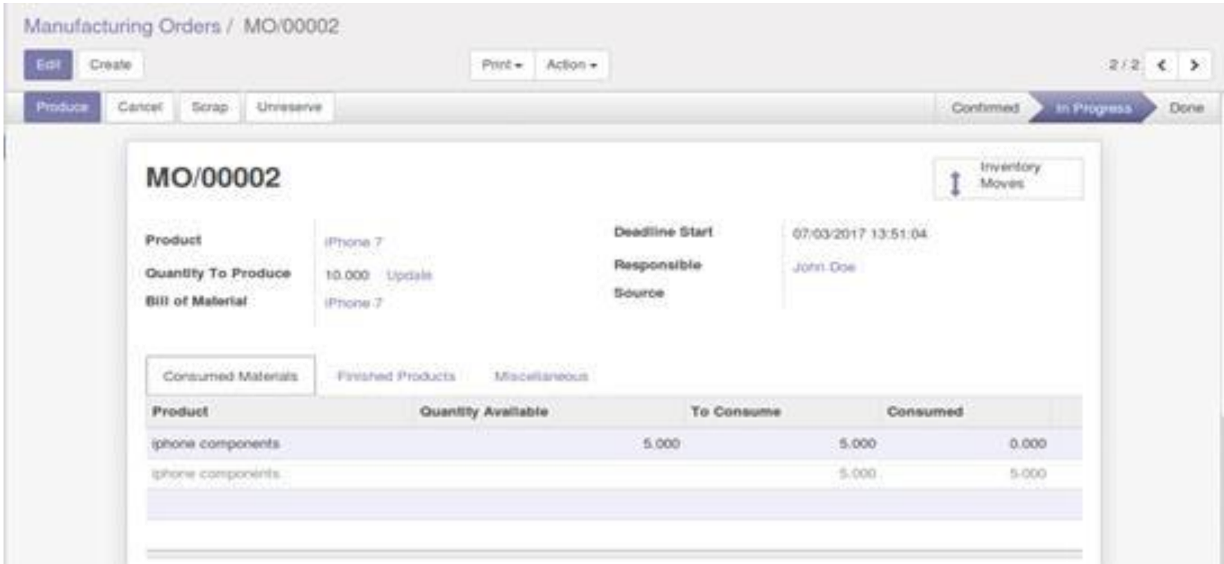
- Choose a product from list (or you may create new one)
- Choose Bill of Material
- Finished product tab will show you the number of finished products.
- Consumed Material tab will display the material consumed for the production
- Click “Check availability” to see the availability of raw materials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

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



- 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” 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.*

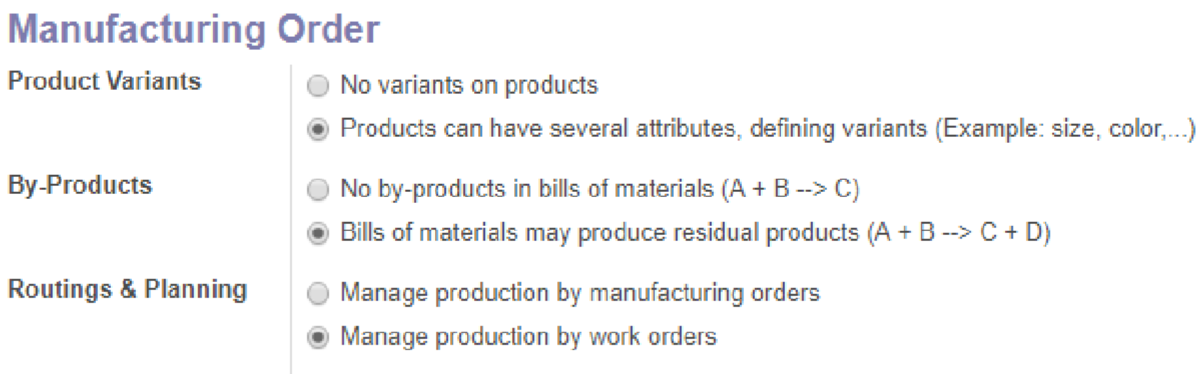
Note**: - you can Update/Delete any manufacturing order from **Manufacturing -> Operations -> Manufacturing Orders Tab.

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

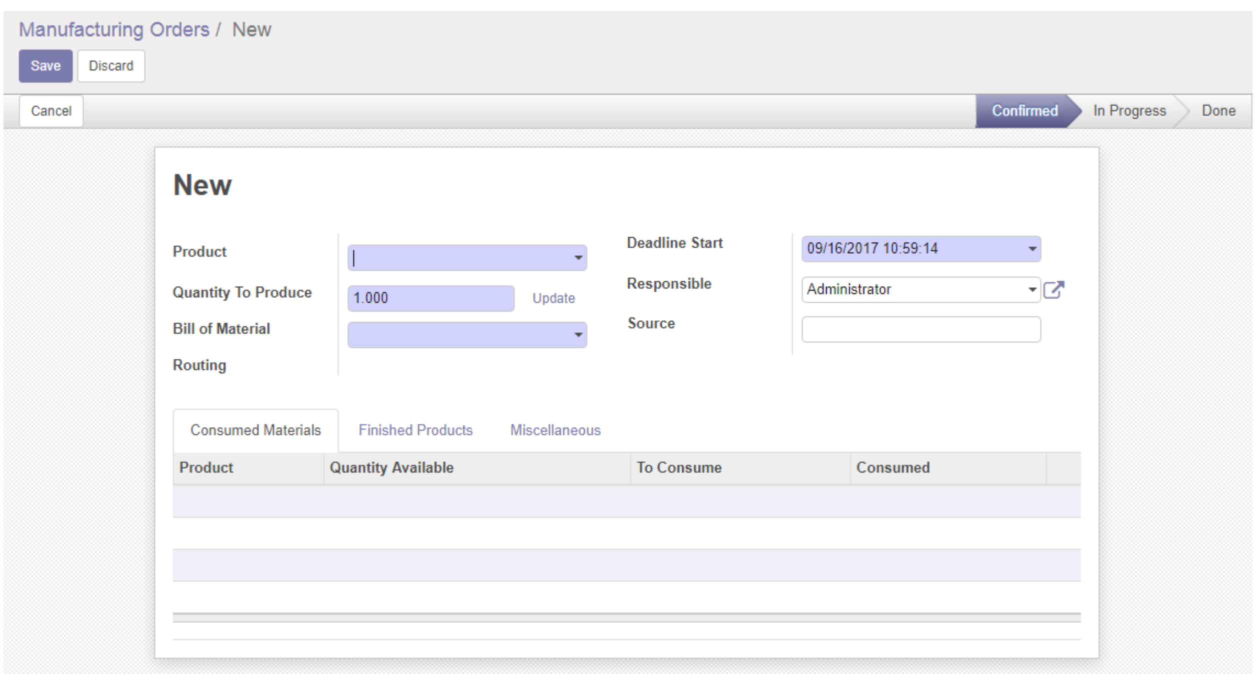
- **Manufacturing -> Settings -> Manufacturing Order**



- 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**



- Fill the fields same as before.

- Select a 'Routing' mechanism, this will be automatically filled once you choose the BoM.

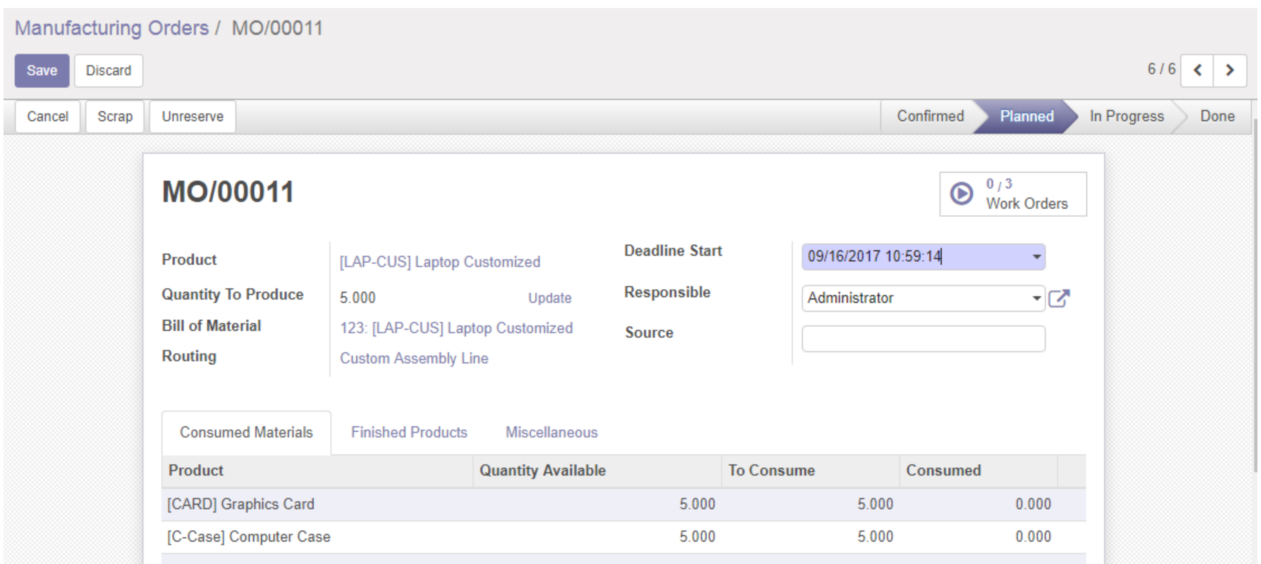
The Status bar will give you a new option ***Create Work Order,*** *Click it to create the work order according to your routing plan*

- 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.

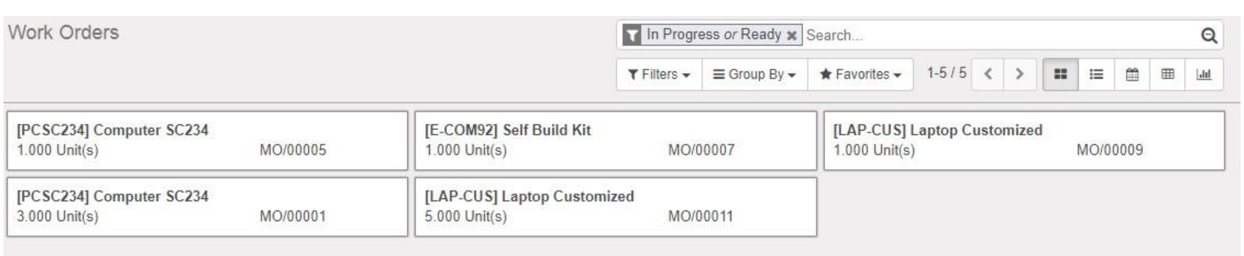
Manage Production

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

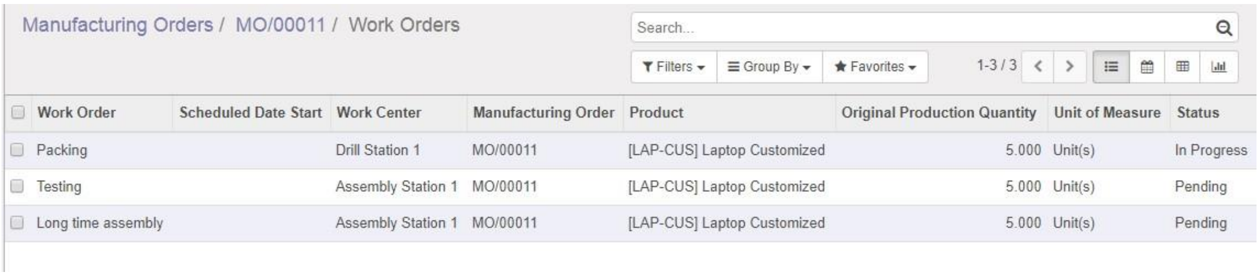
- Open a manufacturing order and Click **"Work Order"** button in the form.



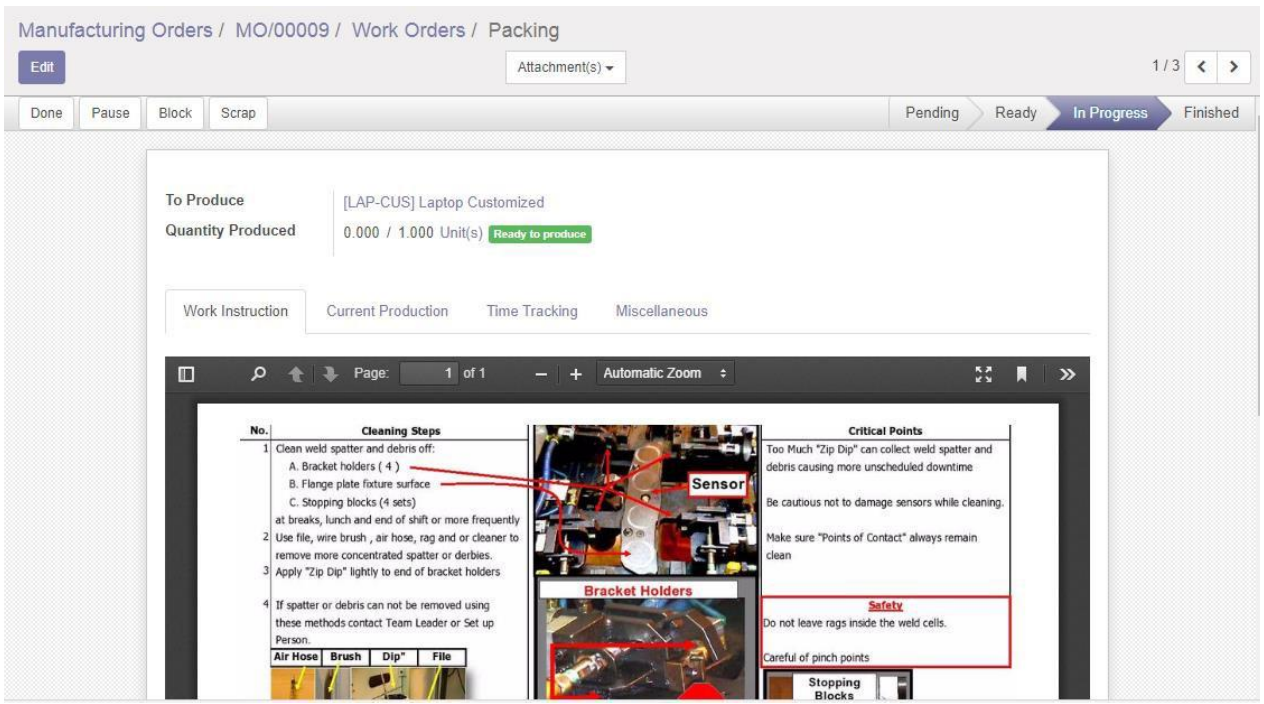
- Or you can access all your work orders from **"Manufacturing > Operations > Work Order"**



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

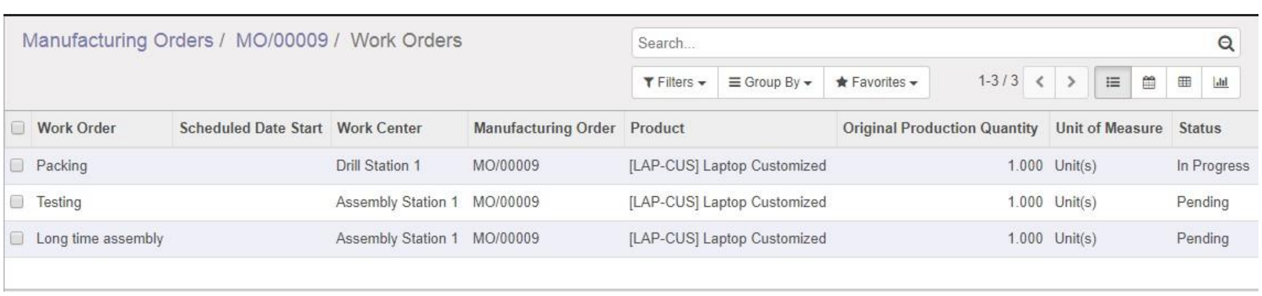


- Select the Tasks from Work Order one by one and complete it.



- 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.



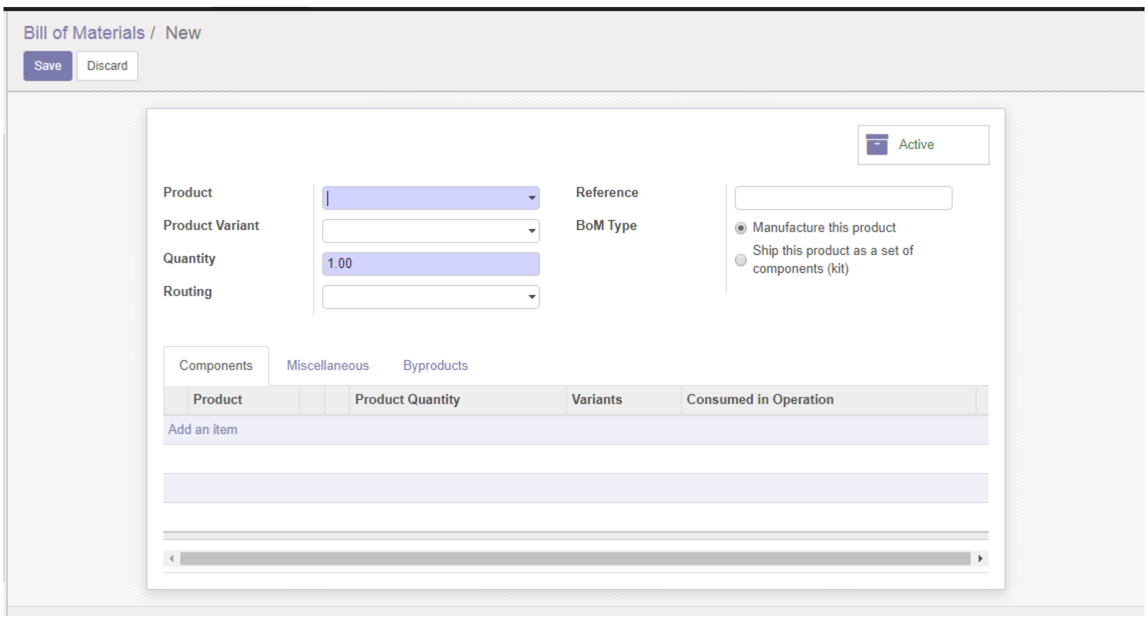
- Complete all the processes in the Work Order to complete Production

- 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.

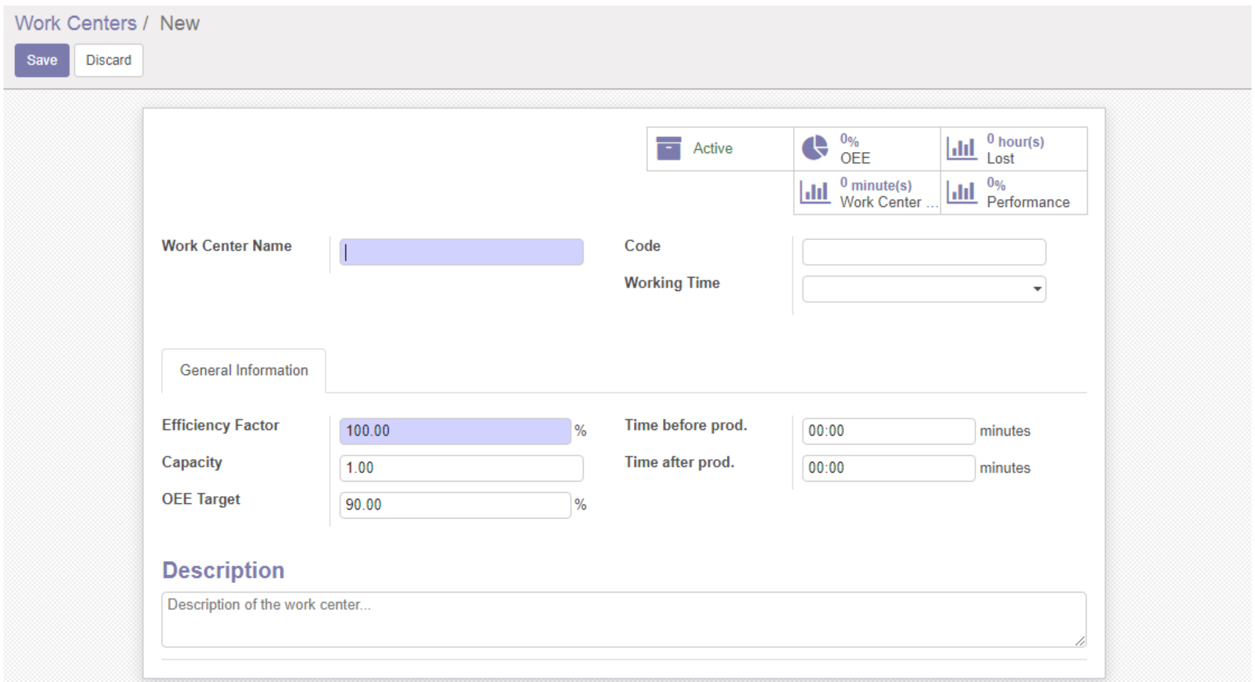
Note: - A BoM can be later Updated/Deleted from same menu i.e. ***Manufacturing > Master Data > Bill of Materials.***

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**



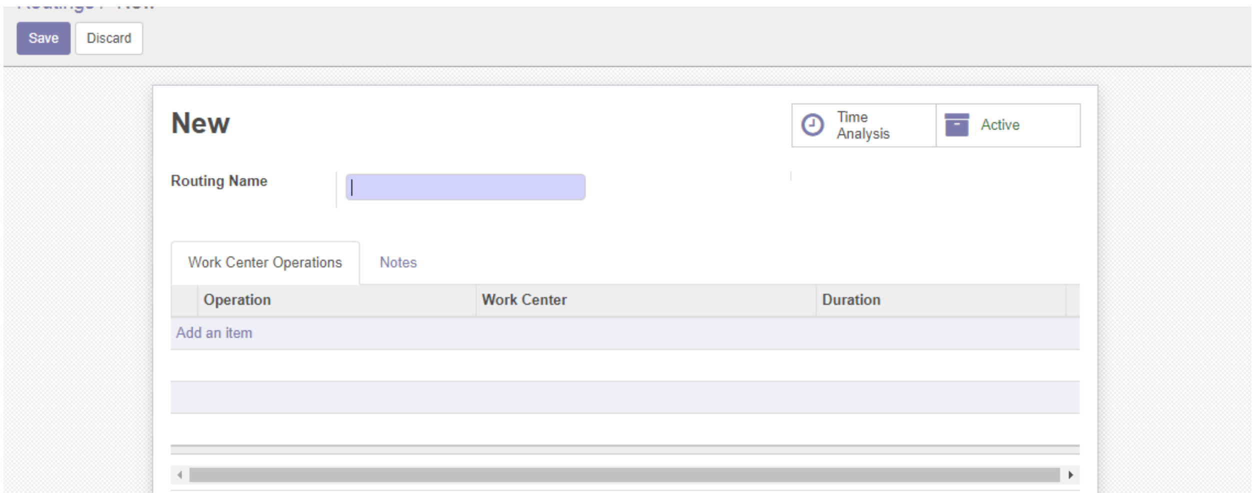
- Add all the necessary information including the process done here and the performance factors etc. in field
- Click **<save>** and mark **<Active**> to make it available for use.

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**



- 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

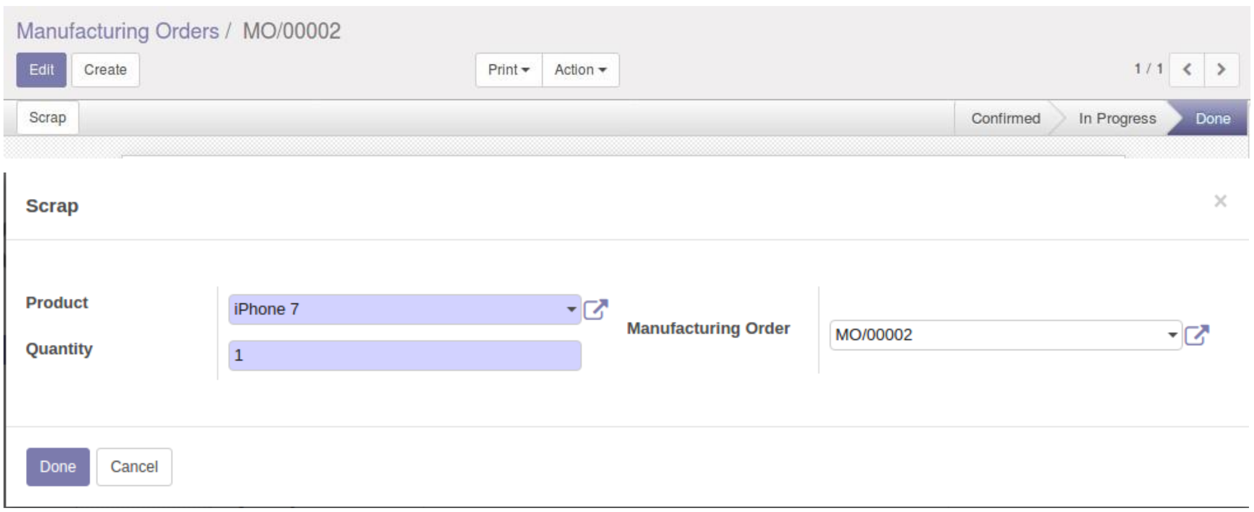
Once you have created and confirmed Manufacturing Order with a specific Rout. All the processes in the Rout are listed as work orders. So in order to complete a production, we must complete all the associated processes in work order. We can access Work Order related to a Manufacturing Order, either from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

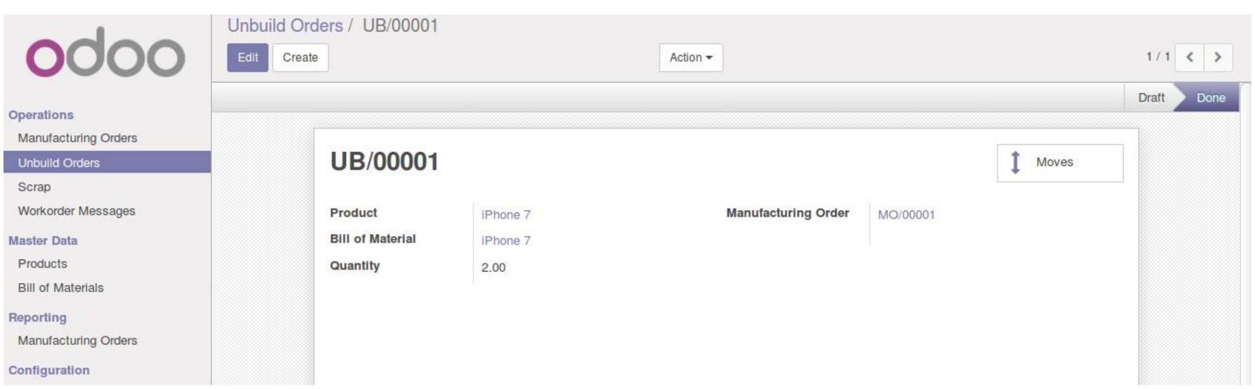


- Fill the fields and Click "**Done**". It will automatically inserted into the inventory.

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.

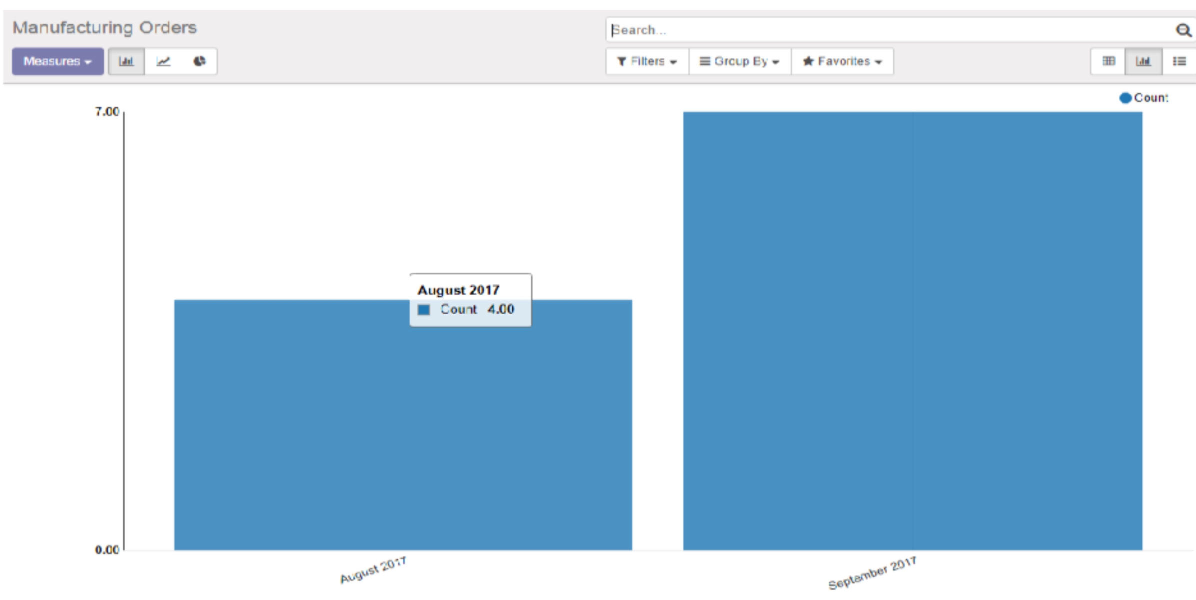
- **Manufacturing > Operations > Unbuild Orders > Create**



- 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

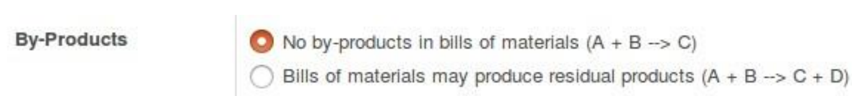


Configurations and Useful Settings

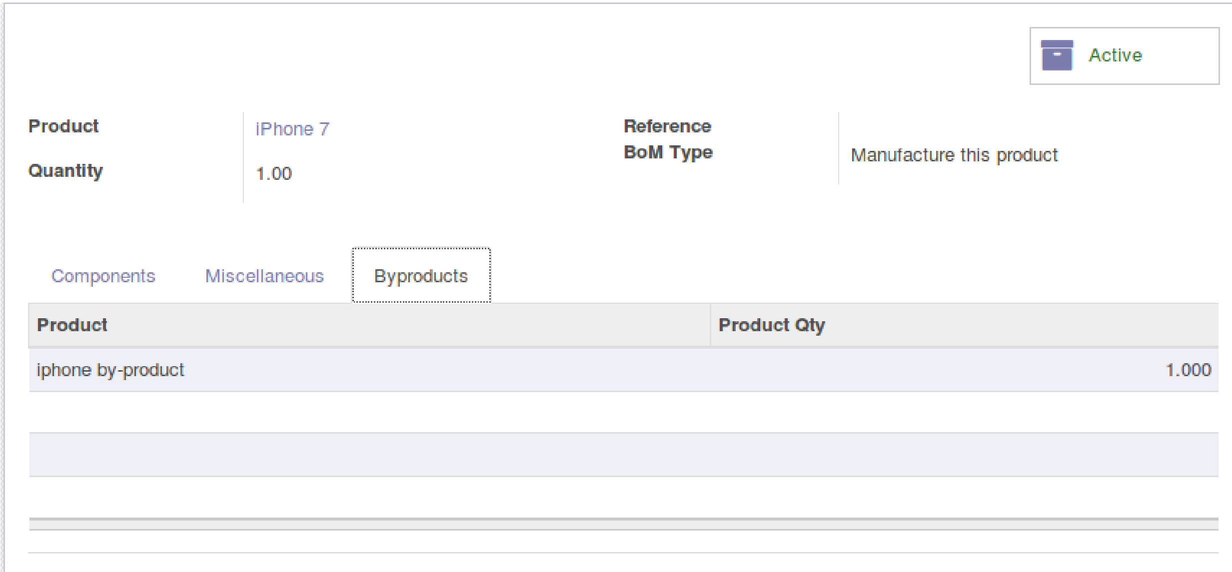
Byproducts configurations

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

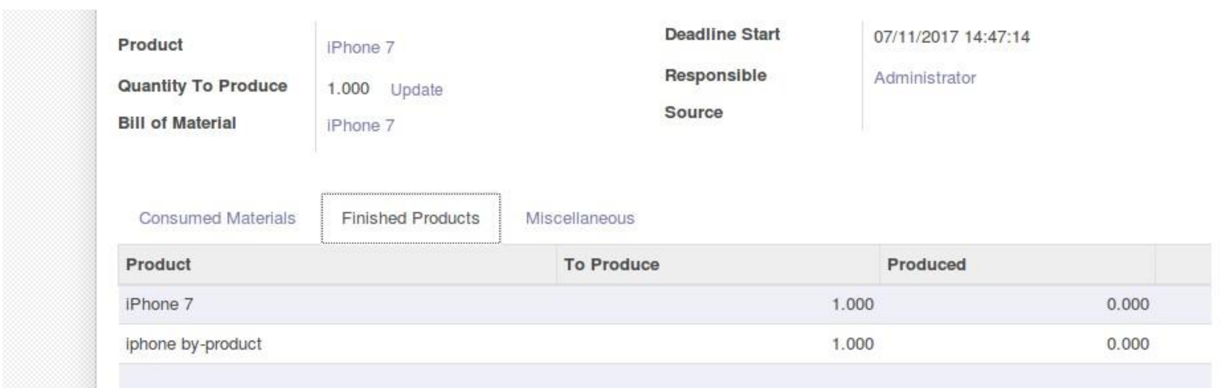
- **Manufacturing > Settings**



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.



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



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.

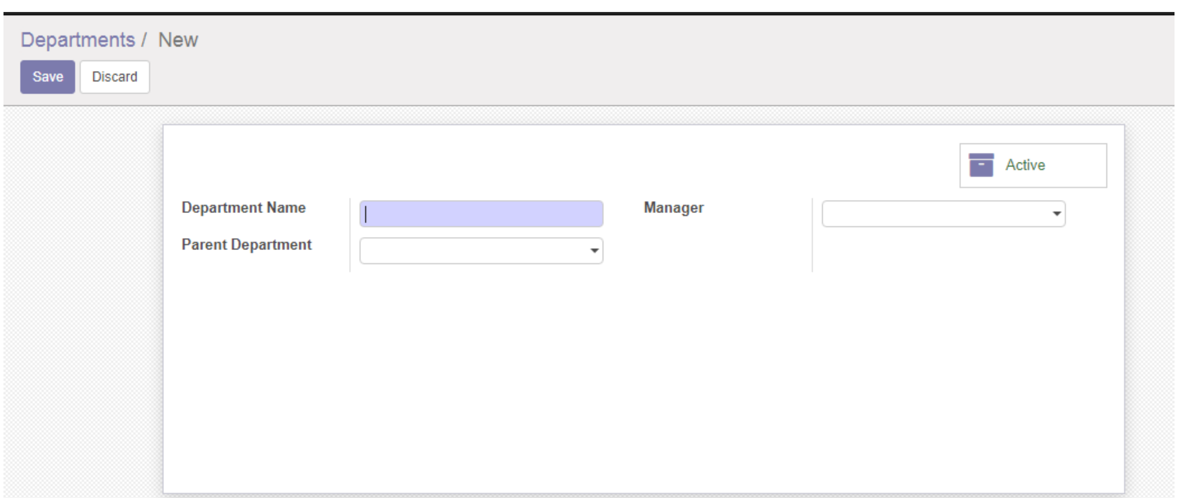
Manager: - Manager who control and configure every procedure in HR module. Complete control over all level.

Department Management

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

Create department

- **Employee > department > Create**



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

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

View Employees in the department

- **Employees > Department**

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

Department wise Report

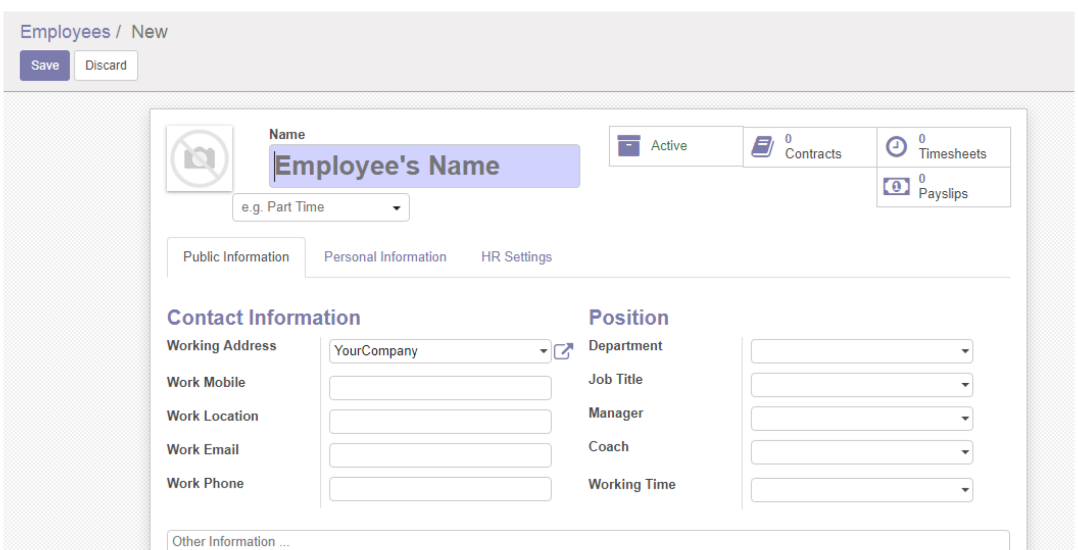
- **Employee -> department**
- Click on **<more>** option from your respective department

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

Employee profile management

Create an Employee Profile

- **Employees > Create**

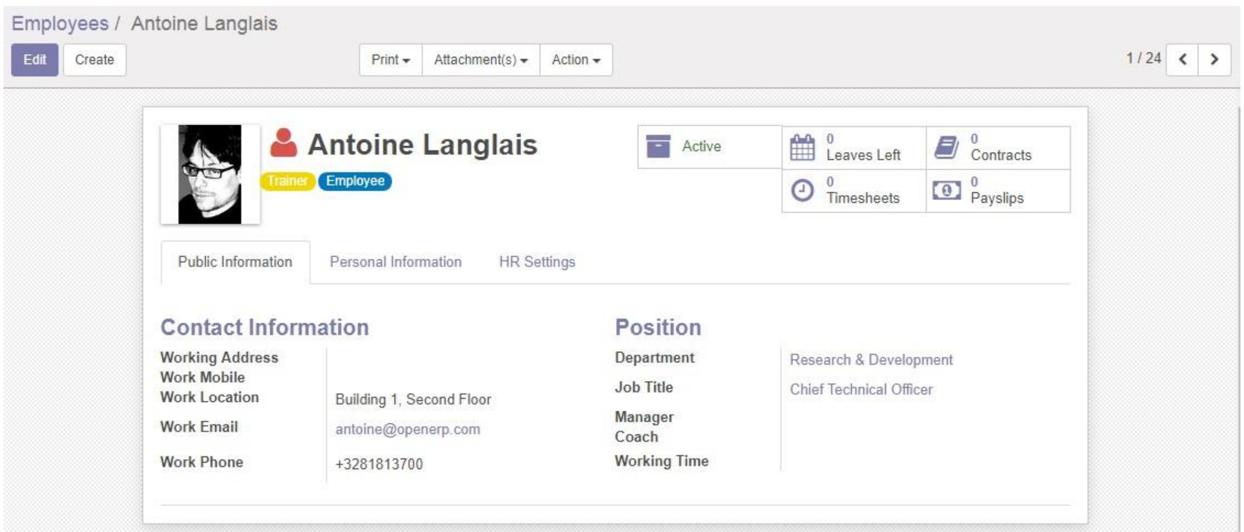


You can Jump through "Public information", "personal information", HR settings" tabs to find all the necessary information for an employee.

- Click **<Save>**

Update/Delete an employee

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



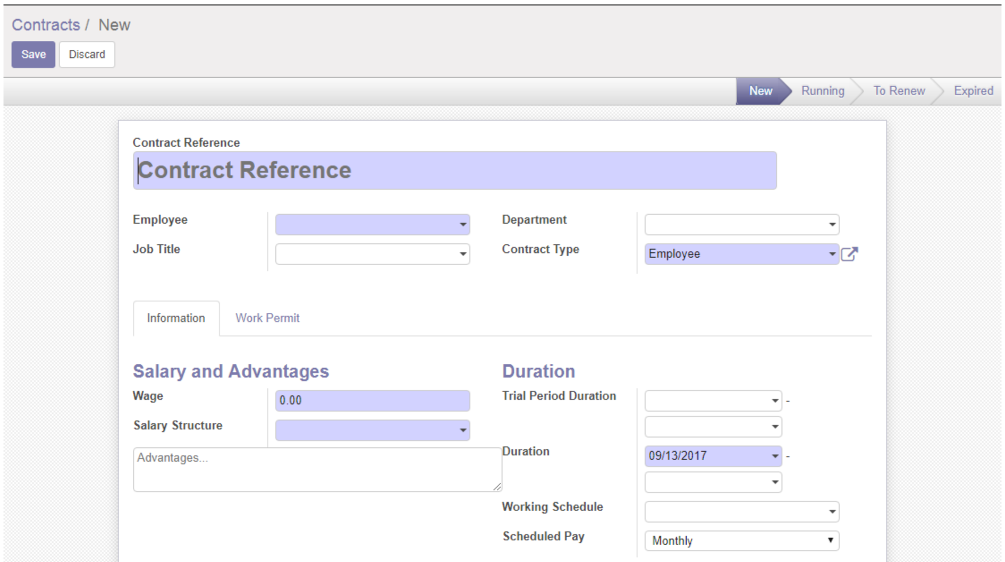
- You can view employee info on the window, make necessary changes if needed and save
- To delete an employee click on '**Action' > Delete**

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

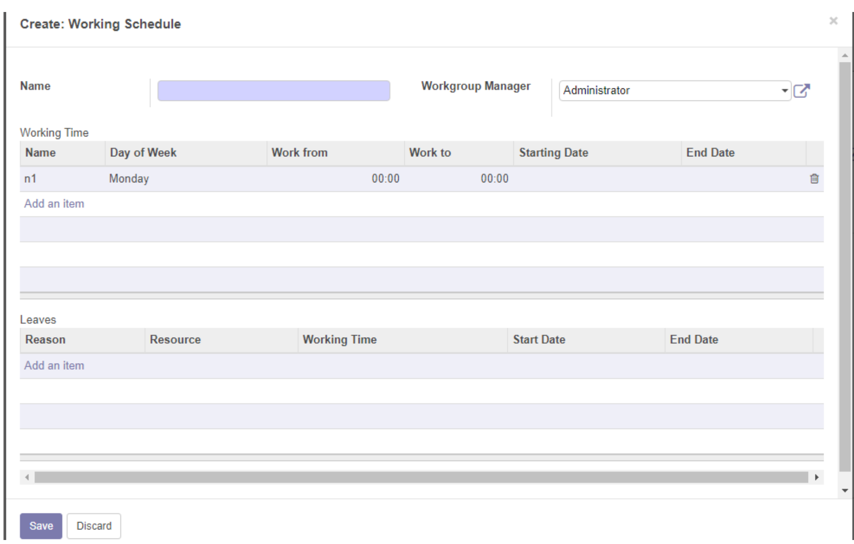
- **Employees > Contract > Create**



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

<u>Working Schedule:-</u>

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



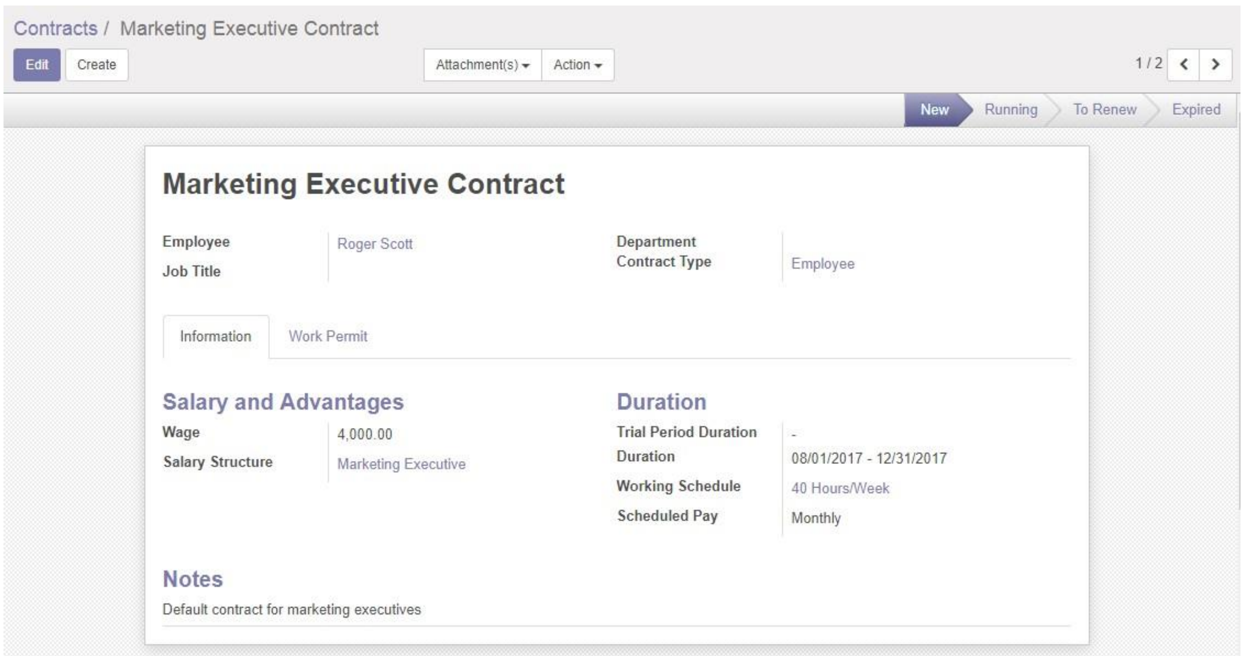
- Click Add an Item to Fill duty timing and Leaves
- Click **<Save>**

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



- Make edits wherever needed and click **<Save>**

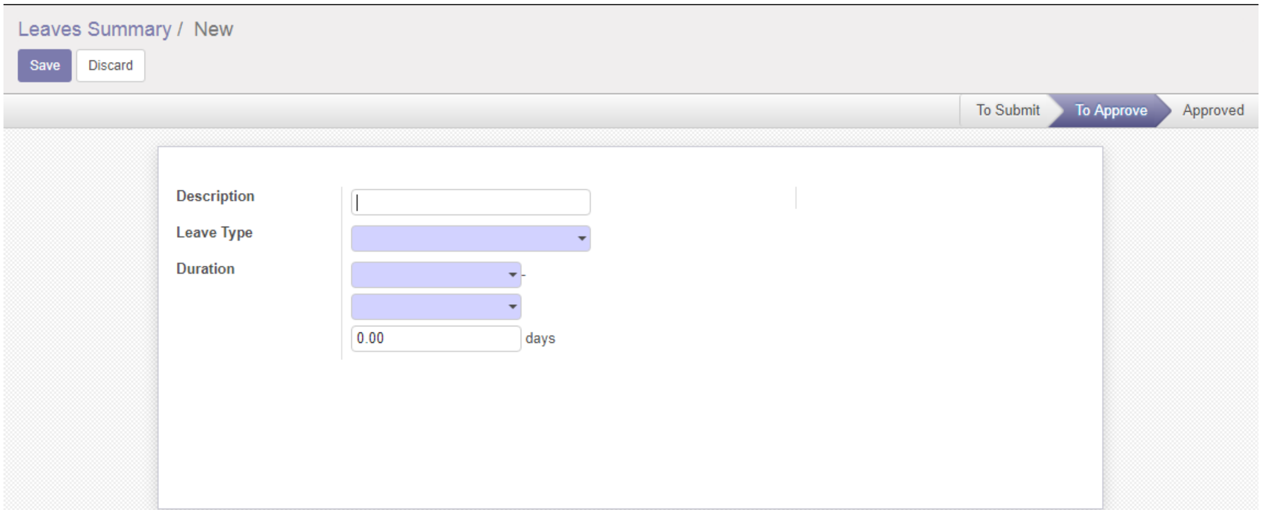
Note: *"change the status of the contract by just clicking on ribbon that indicate the status"*

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. Oddo 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**



- Fill the fields and **<save>**

(Now the status of your leave is “**To Approve**”, it will be changed once concerned officer approve this leave).

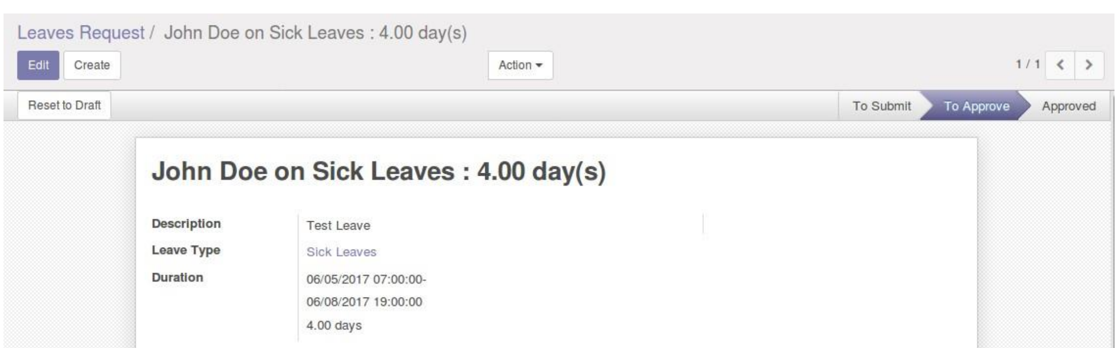
Approve leave

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

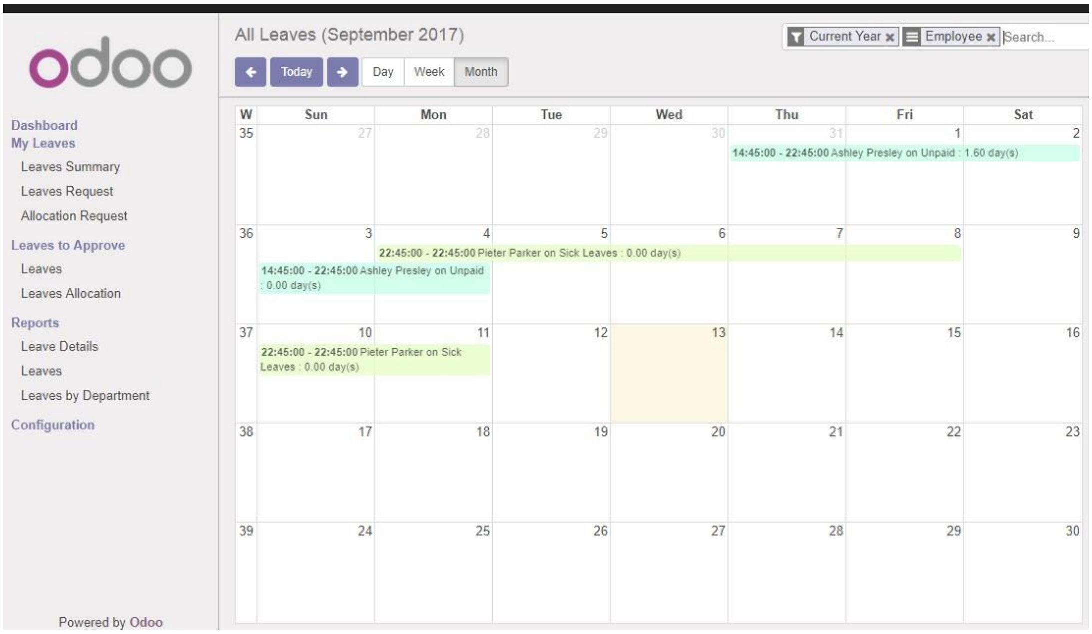
- All leave requests will be listed here
- Select a leave request and Approve or Reject



Leave Report

Administrator can View detailed and varying reports in his dashboard.

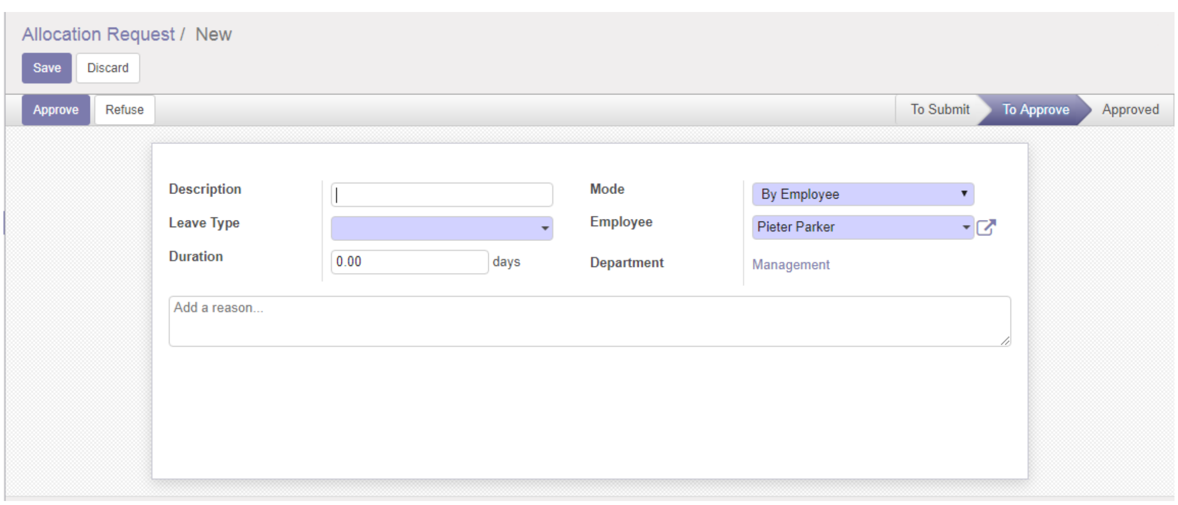
- **Leaves> Reports**



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

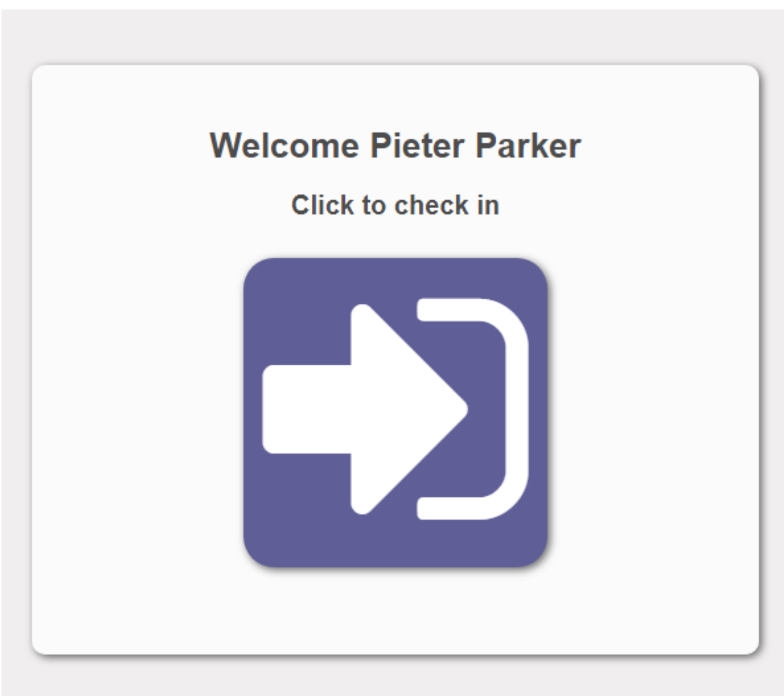
Basically there are three ways to mark attendance

- 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

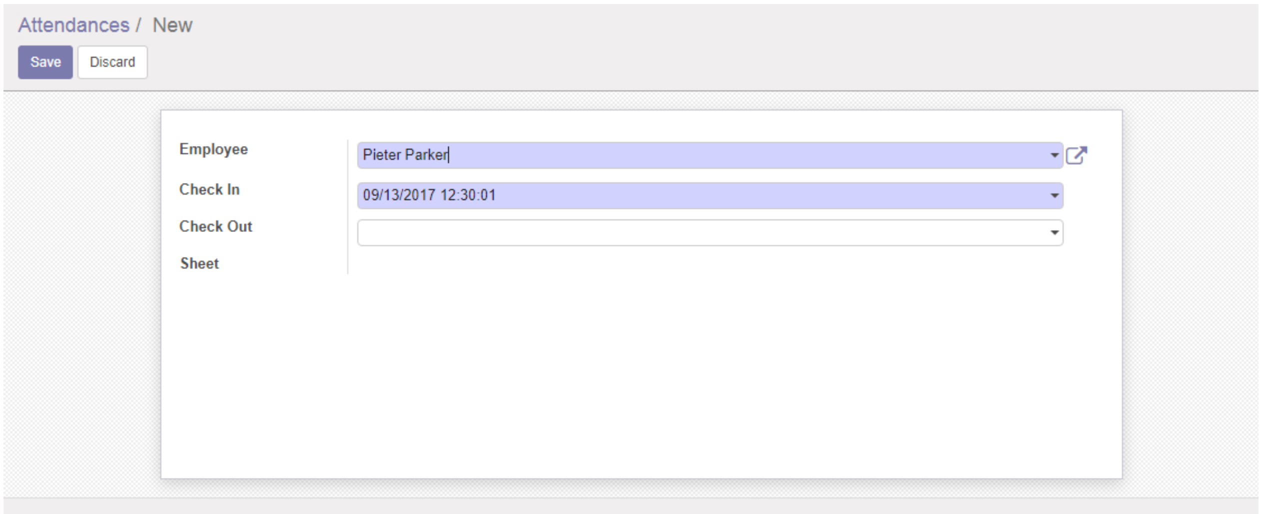


Click the image **to check in and click again to check out**.

Admin make manual entry

Since direct login is not allowed for all users, Oddo provides another option to mark attendance. Administrator or any dedicated person can mark attendance for each employee.

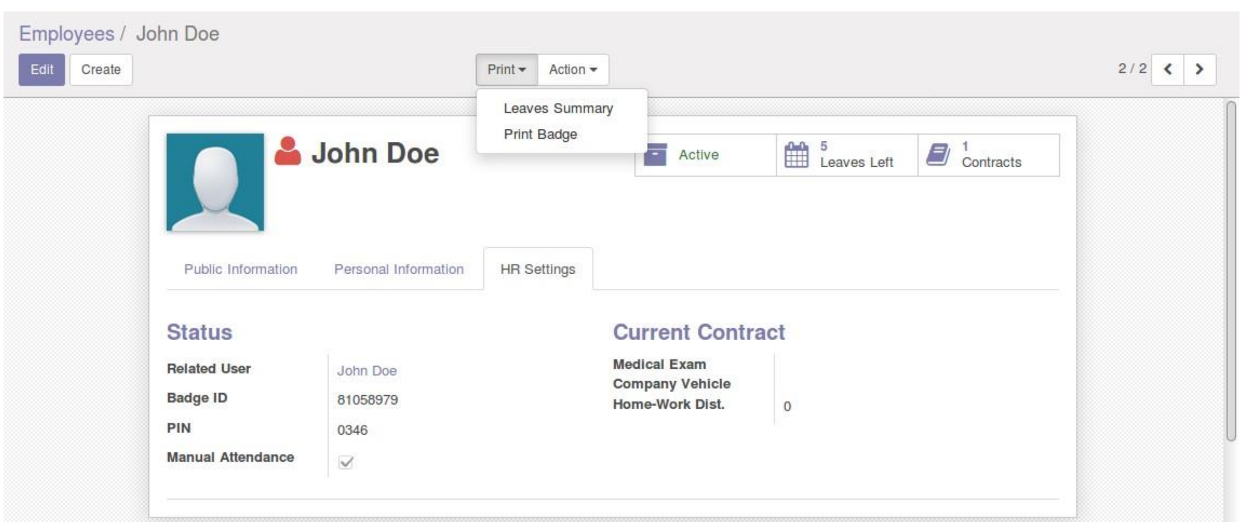
- **Attendances -> Manage Attendances ->Attendances -> Create**



- Mark the fields and **<Save>**

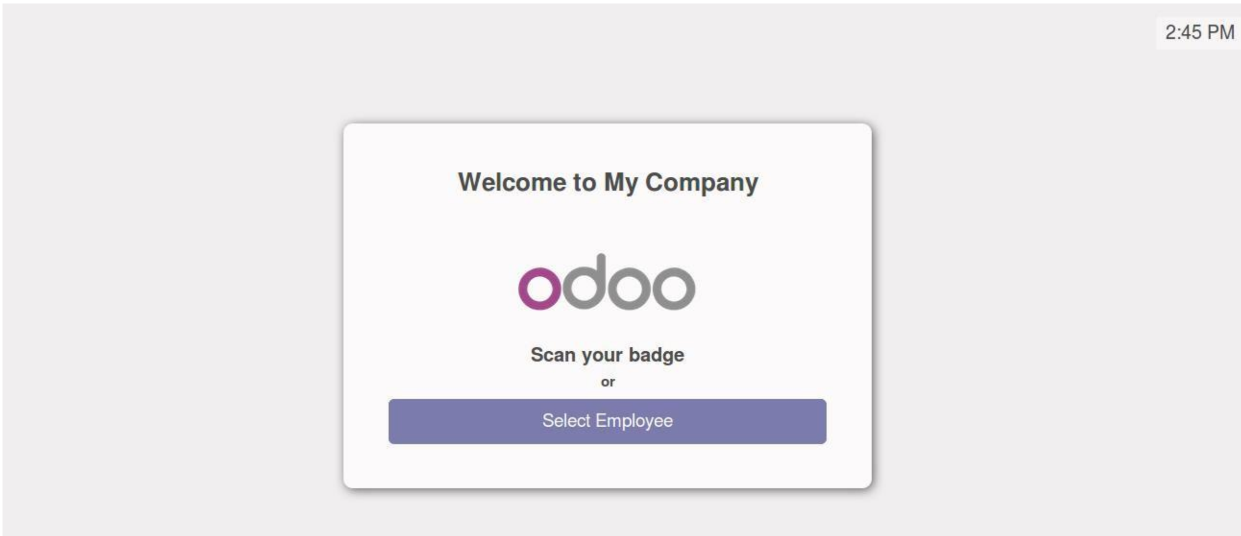
Kiosk Mode

New Interface provided by Odoo version 10, which feeds attendances of employee using their badges or pin. The badges can print from employee form.

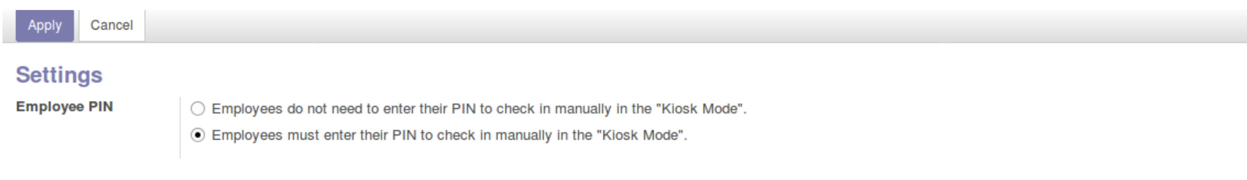


Using these badges employees can Check In/out.

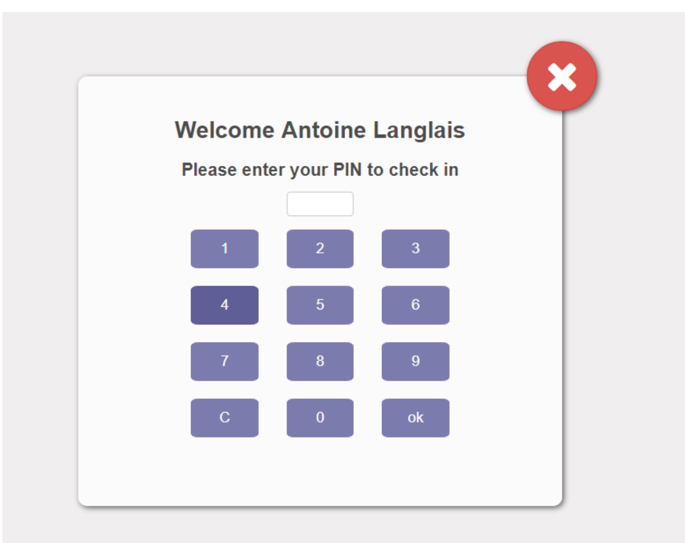
- **Attendances -> Manage Attendances -> Kiosk Mode**



Another option is Check in/out using pin. For this we have to enable Configurations under **Attendance** menu.



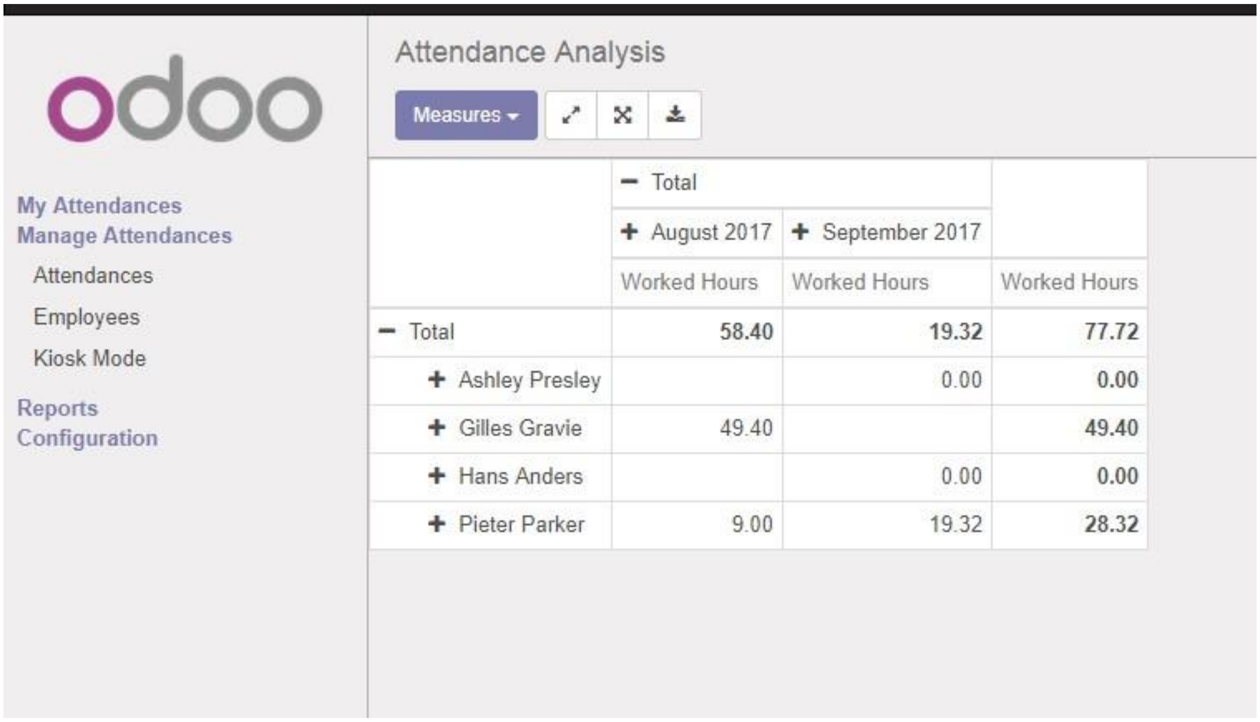
Use “**Select Employee**” button on kiosk mode to check in/out using pin. It gives the interface to enter pin.



Reports

Admin can view detailed attendance report on

Attendances > Report



PayRoll

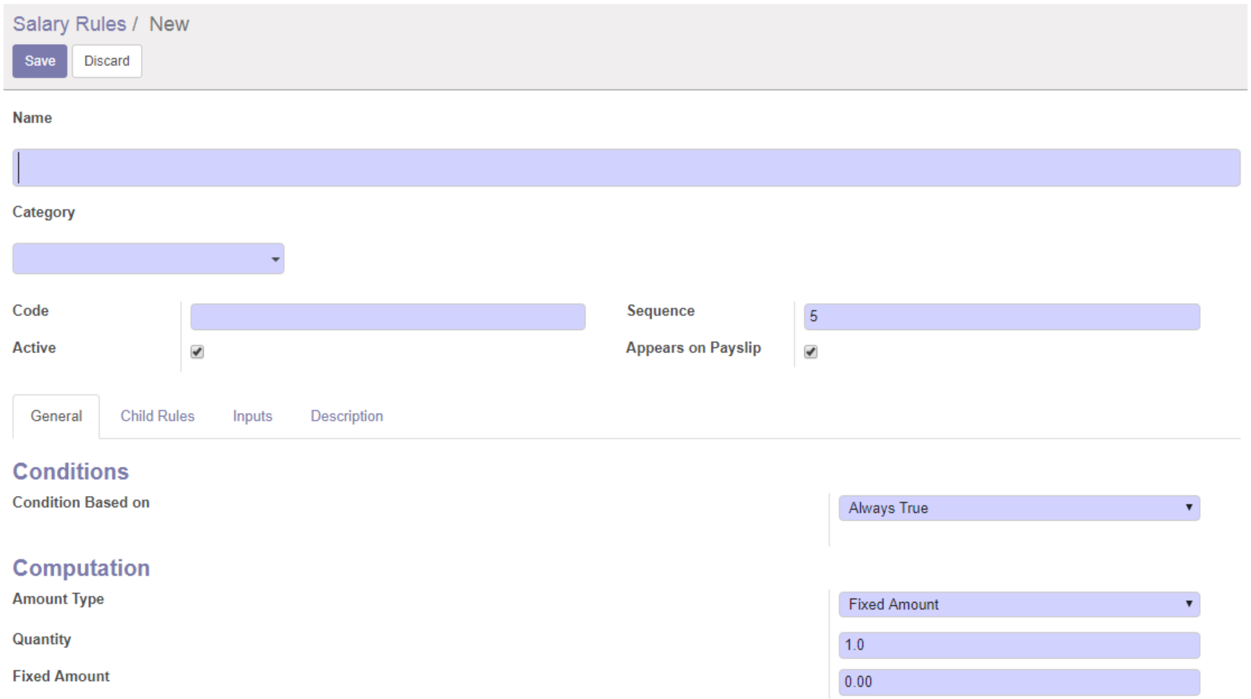
To enable the payroll functionalities we have to install a new plugin in HR, called Payroll. To integrate payroll with accounting, you have to install another plugin that is Payroll Accounting from Odoo apps. To generate a pay slip, the **employee should have an active contract and a salary structure**. **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**



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

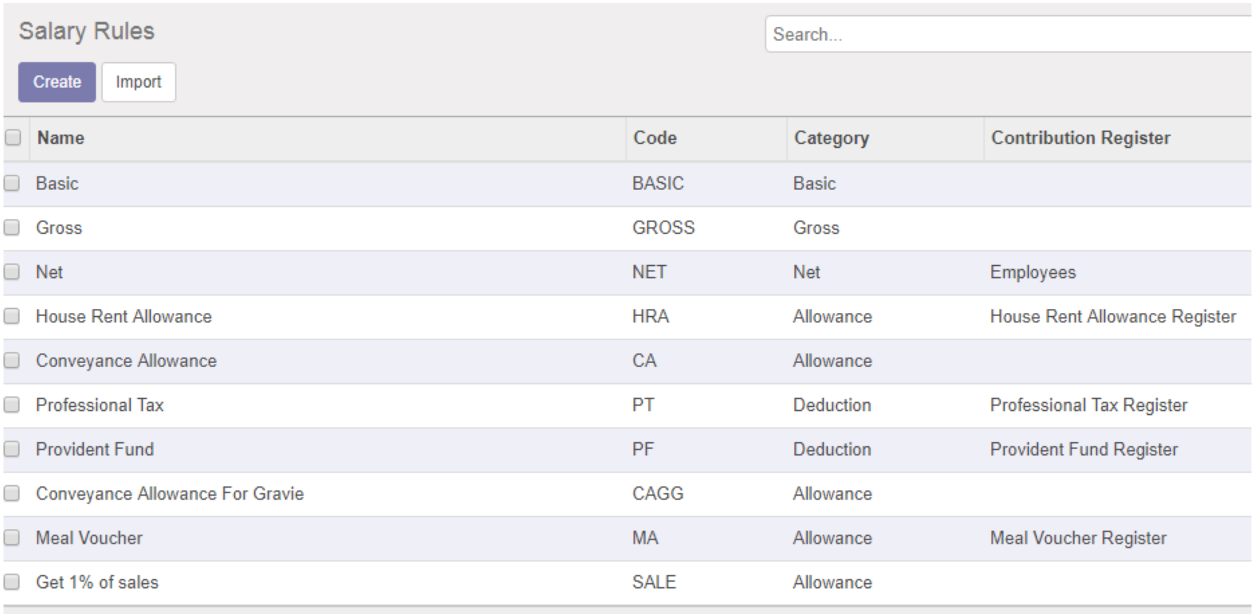
Contribution Register: - Use, if third party involved in salary payment

"*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

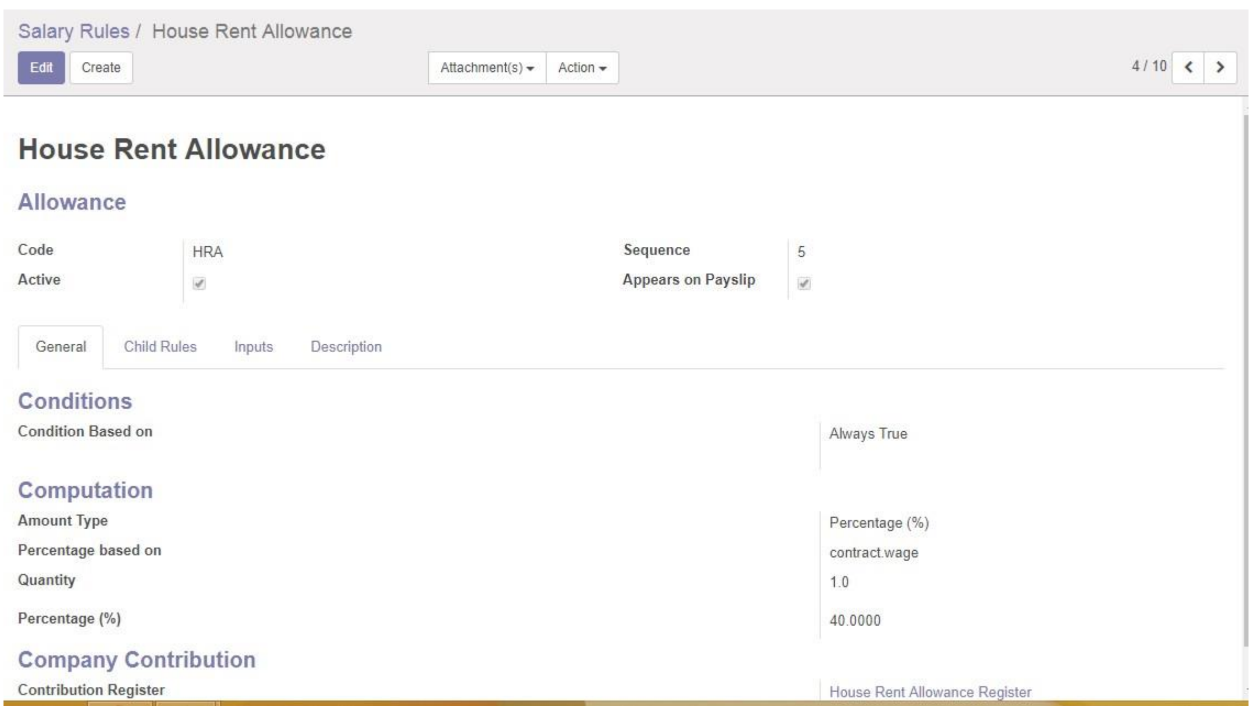
Update/Delete a salary rule

- **Pay Roll > Salary Rule**



Name	Code	Category	Contribution Register
Basic	BASIC	Basic	
Gross	GROSS	Gross	
Net	NET	Net	Employees
House Rent Allowance	HRA	Allowance	House Rent Allowance Register
Conveyance Allowance	CA	Allowance	
Professional Tax	PT	Deduction	Professional Tax Register
Provident Fund	PF	Deduction	Provident Fund Register
Conveyance Allowance For Gravie	CAGG	Allowance	
Meal Voucher	MA	Allowance	Meal Voucher Register
Get 1% of sales	SALE	Allowance	

- Select the Pay Rule you wish to change from the list and Click **<Edit>** button



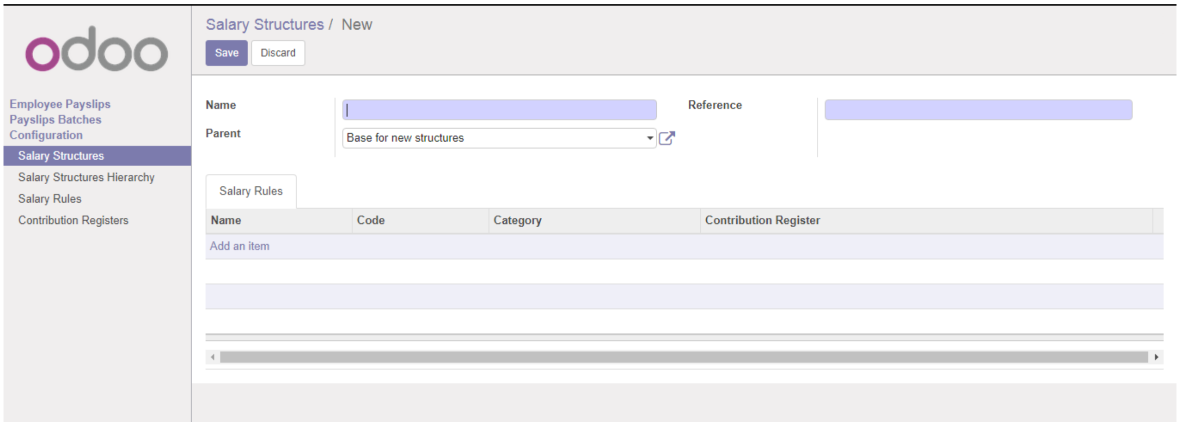
- Make necessary changes in the fields and **<save>**
- Or you can delete the rule from **Action > Delete**

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**

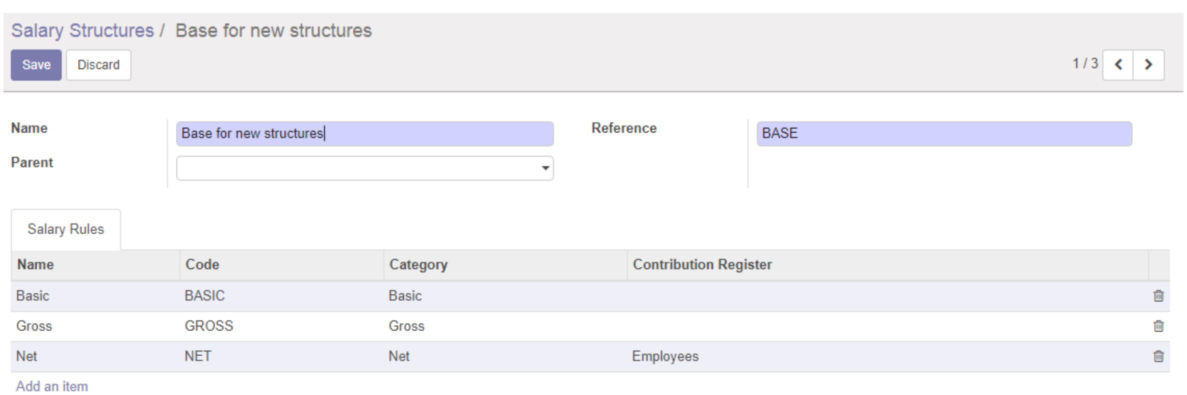


You can add any applicable salary rule to this structure to make new salary rule.

- Once finished click **<Save>**

Update/Delete Salary Structure

- **Payroll -> Configuration -> Salary Structure**
- Select the salary Structure you wish to edit
- Click **<Edit>**

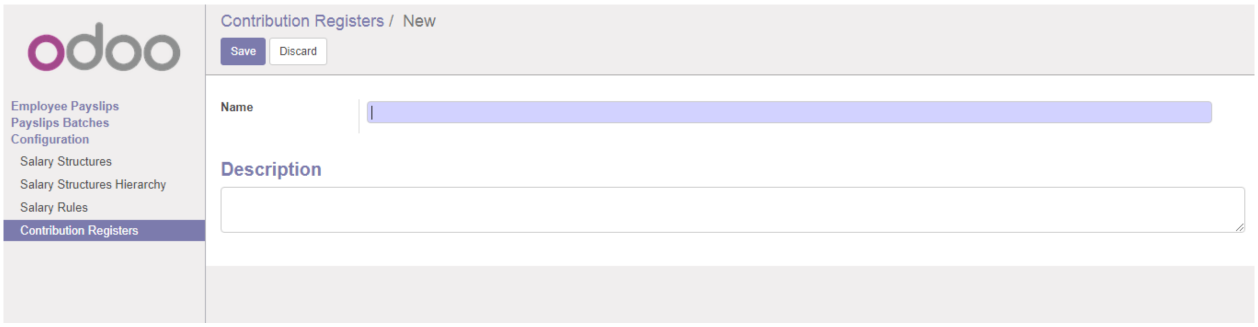


- Make the changes and **<save>**
- Or you can delete the structure altogether

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**



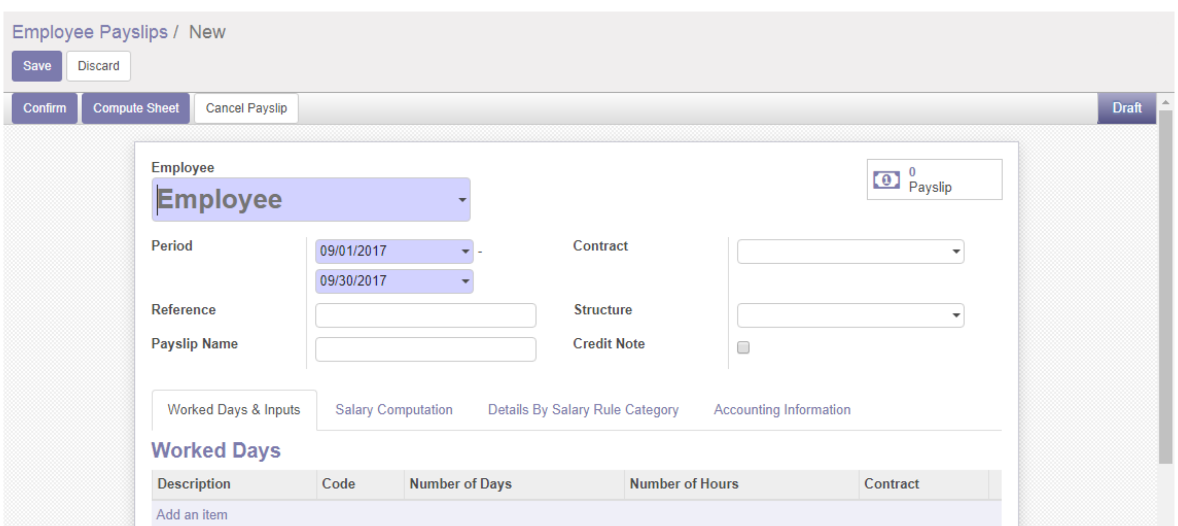
Note: - *"you can Update or Delete Contribution Register from the same menu itself"*

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**



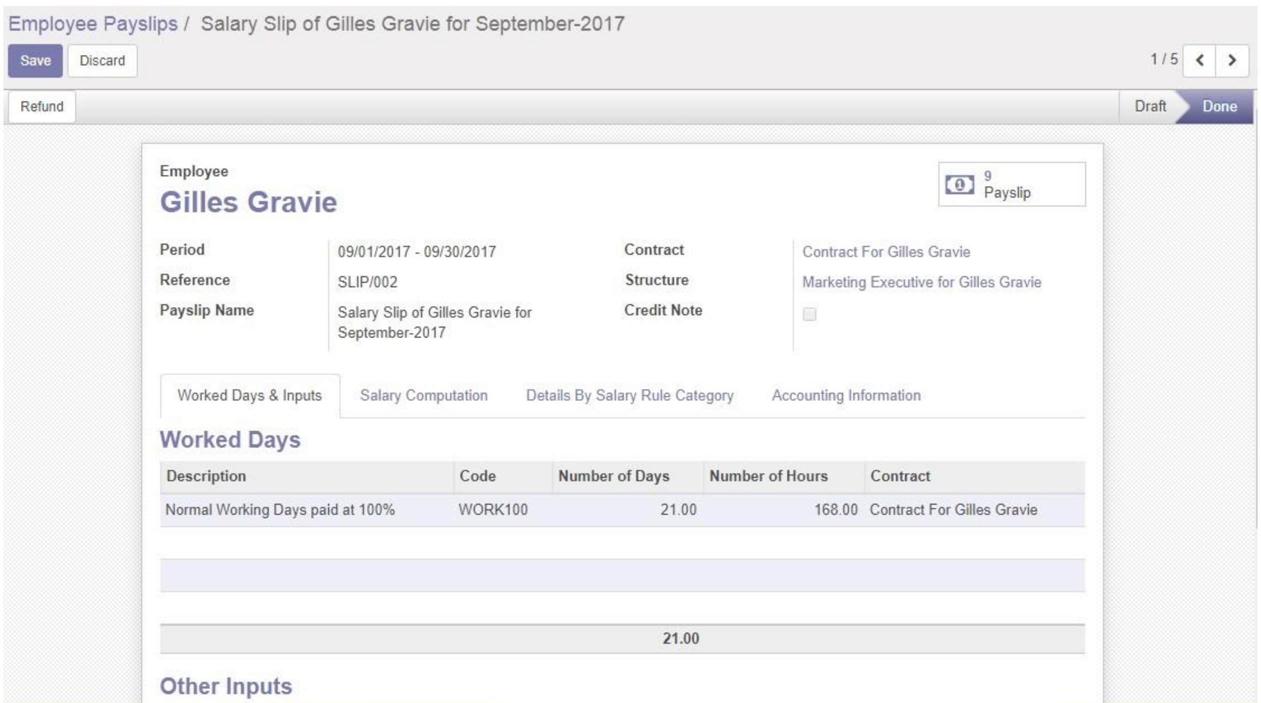
Once you have filled the necessary information then click **Compute Sheet** to calculate salary and **<Save>**

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**



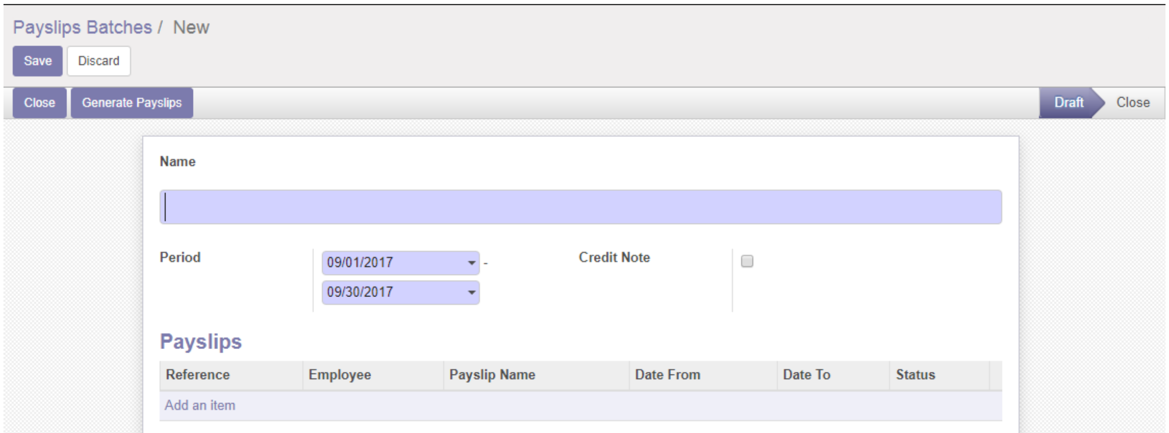
- Make changes and Save
- Or **Discard** to delete the Payslip

Batch Payslip

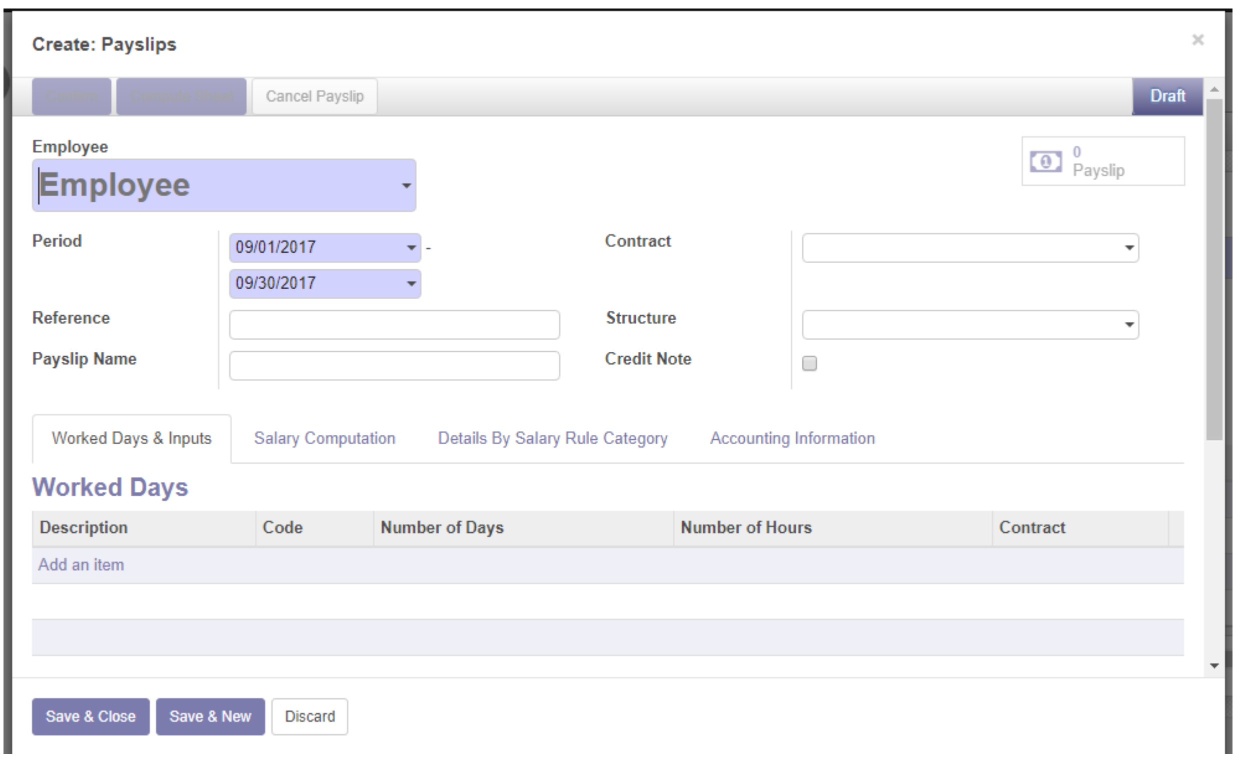
Batch Payslip is used to process Payslip for group of employees. You can add number of employee to a single batch and generate Payslip simultaneously instead of individual processing.

Create Batch Payslip

- **Payroll -> Payslip Batches -> create**



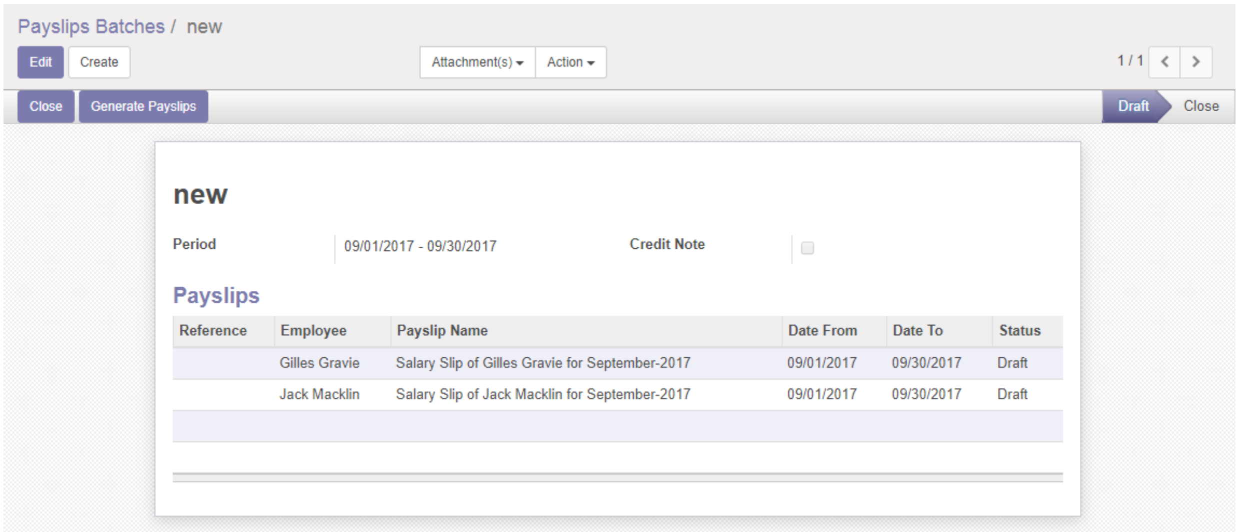
- Click **Add an Item** to add employees to list



- 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>**



- Make changes and save
- Or you can discard

Expenses

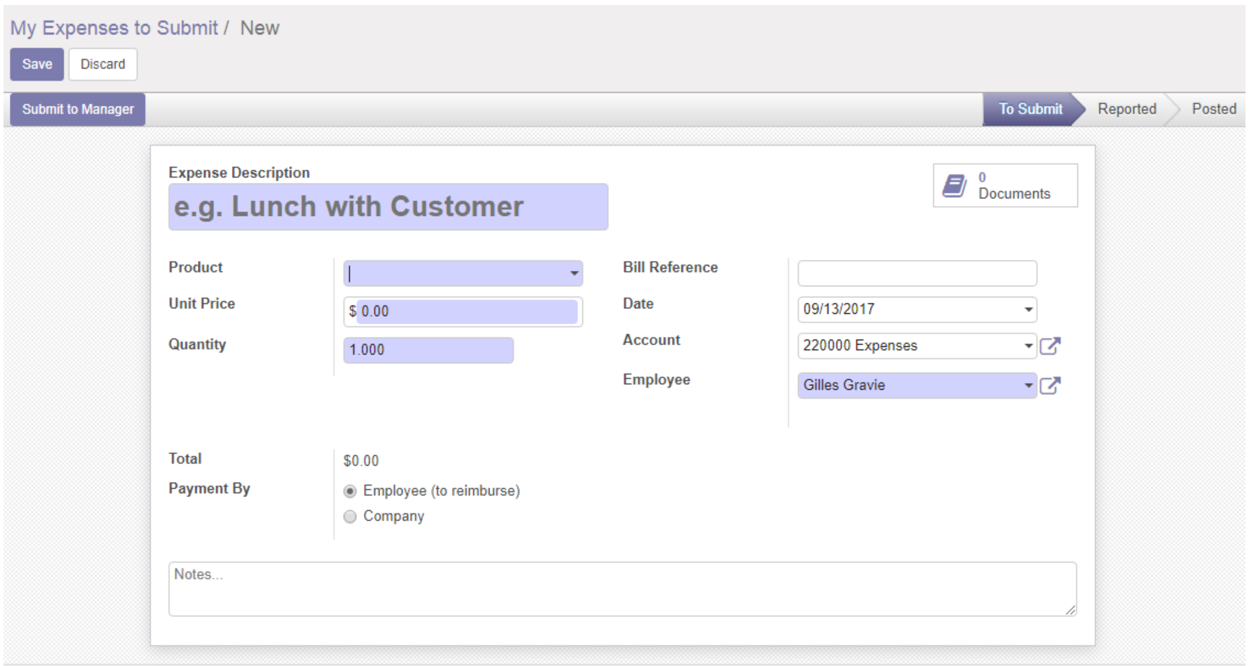
Expenses bared to an employee can be managed with simple steps in Odoo Expense manager. Here an employee can generate, submit and track status of his expenses. There are two ways to generate expense. Either by single expense or “**Report Expense**” mode. As the name indicates former can include only 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.

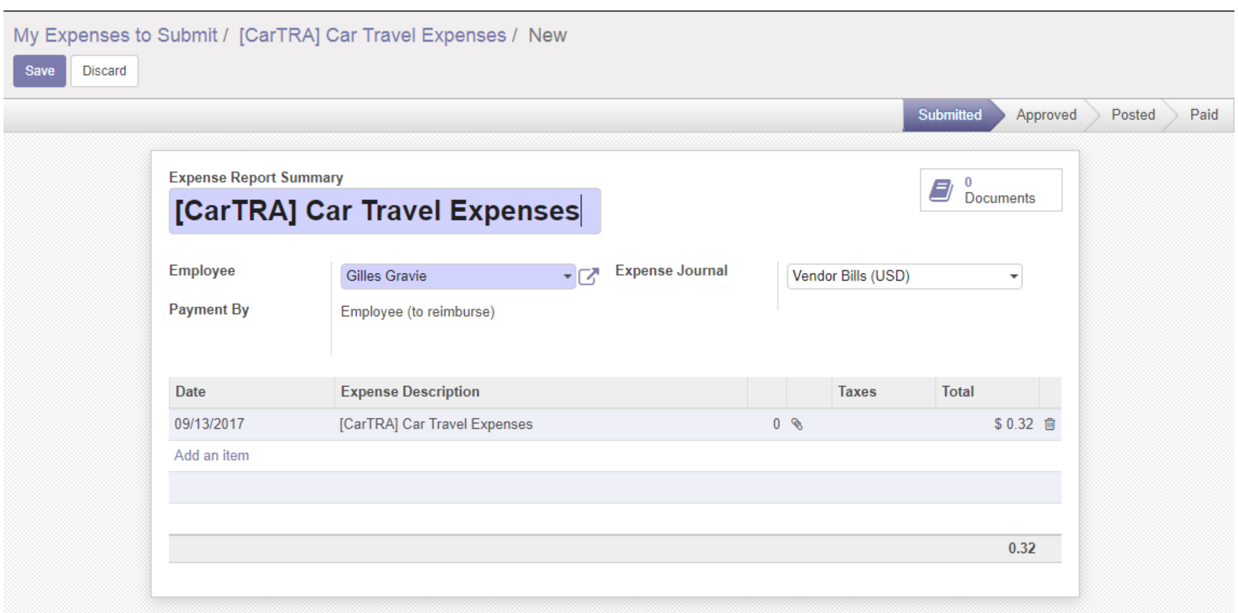
Generate an Expense

Single expense creation

- **Expenses > My Expenses > Expenses to Submit > Create**



- Fill the fields and click **<Submit to Manager>**

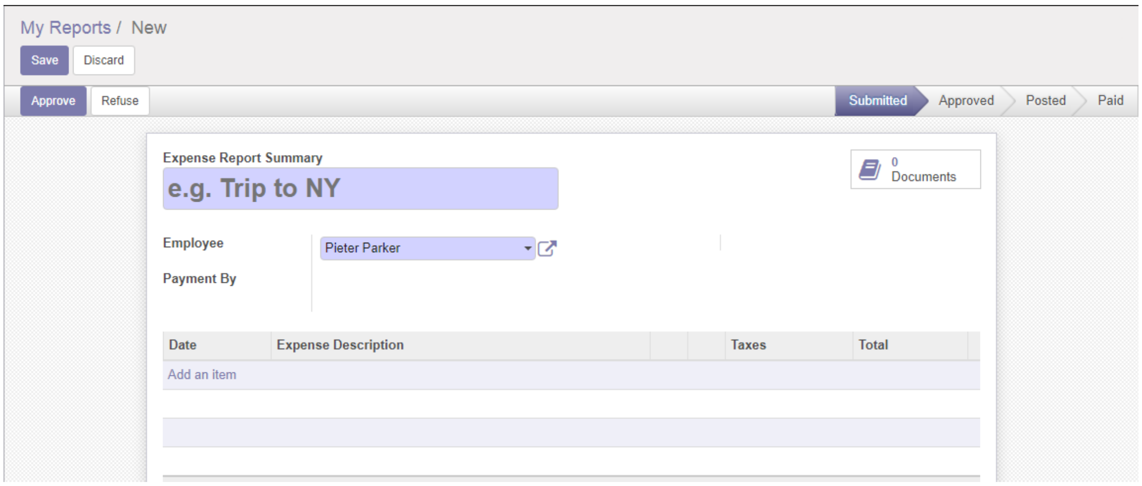


"You can add more number of items to a same expense bill

*"Once the expense is **submitted** you can see the status of the expense changes"*

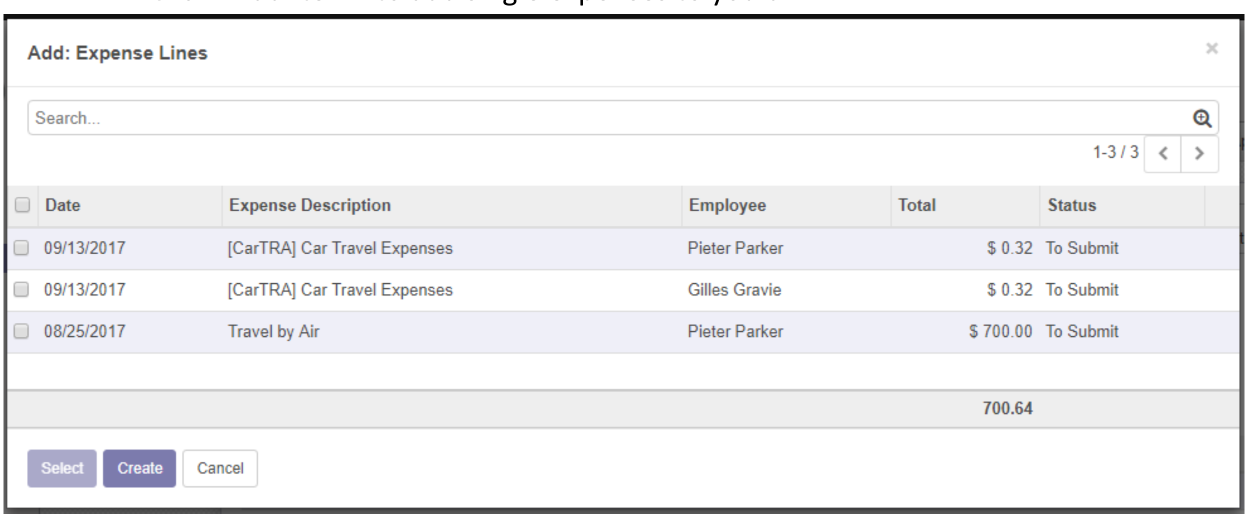
- Finally save the Expense bill.

***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."*



<u>Expense Report Creation (Multiple expense entry in a single bill)</u>

- **Expenses > Expense Reports > Create**
- Click <Add Item> to add single expenses to you bill.



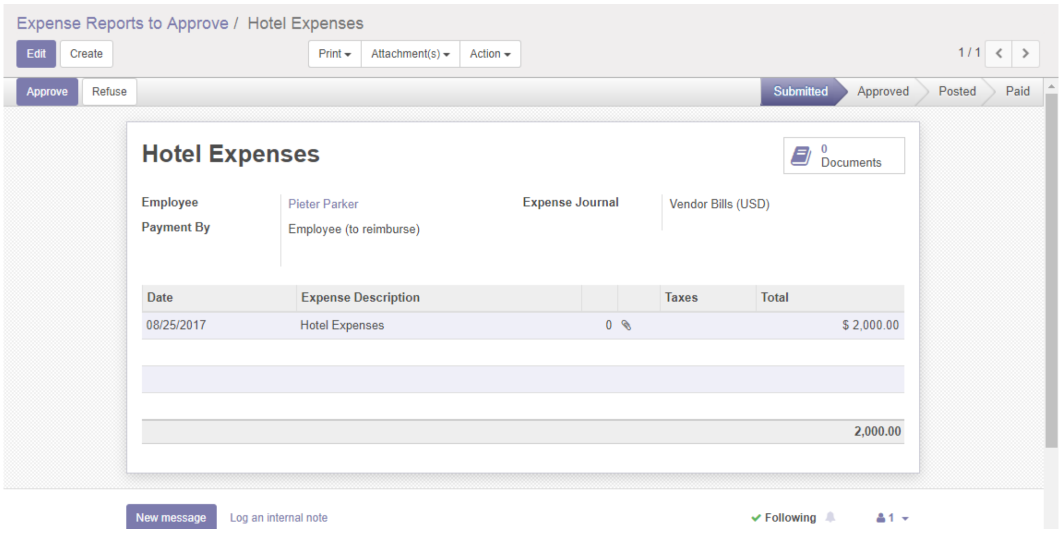
- You can either choose an already created expense to your list or you can create new expense by clicking **<Create>** button
- <Save> the report and <**Submit** To Manager> for approval

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.

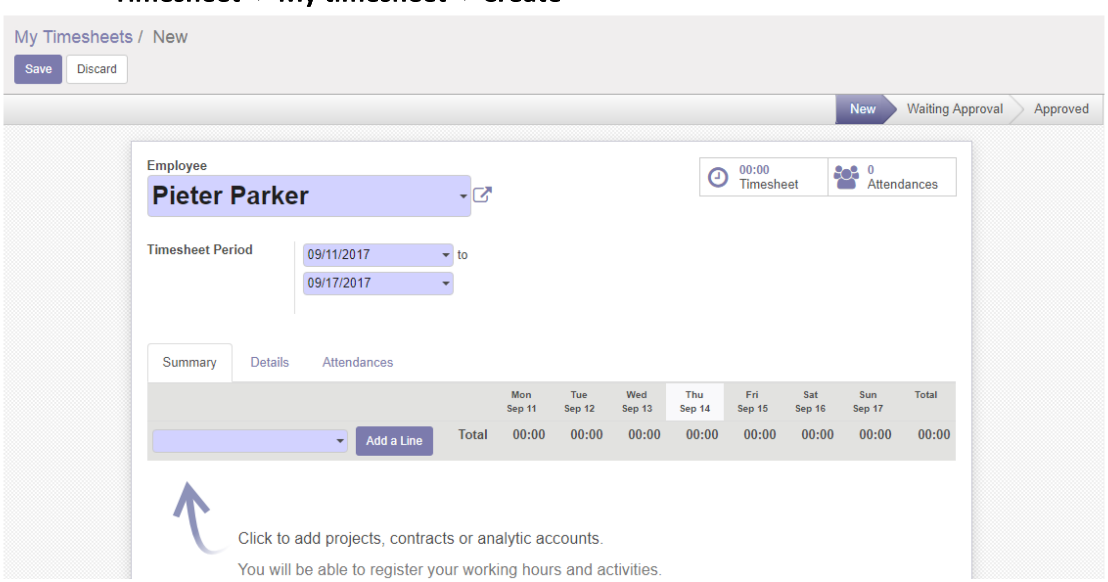


Timesheet management

Time sheets are closely associated with project management. In HR module Oddo 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**



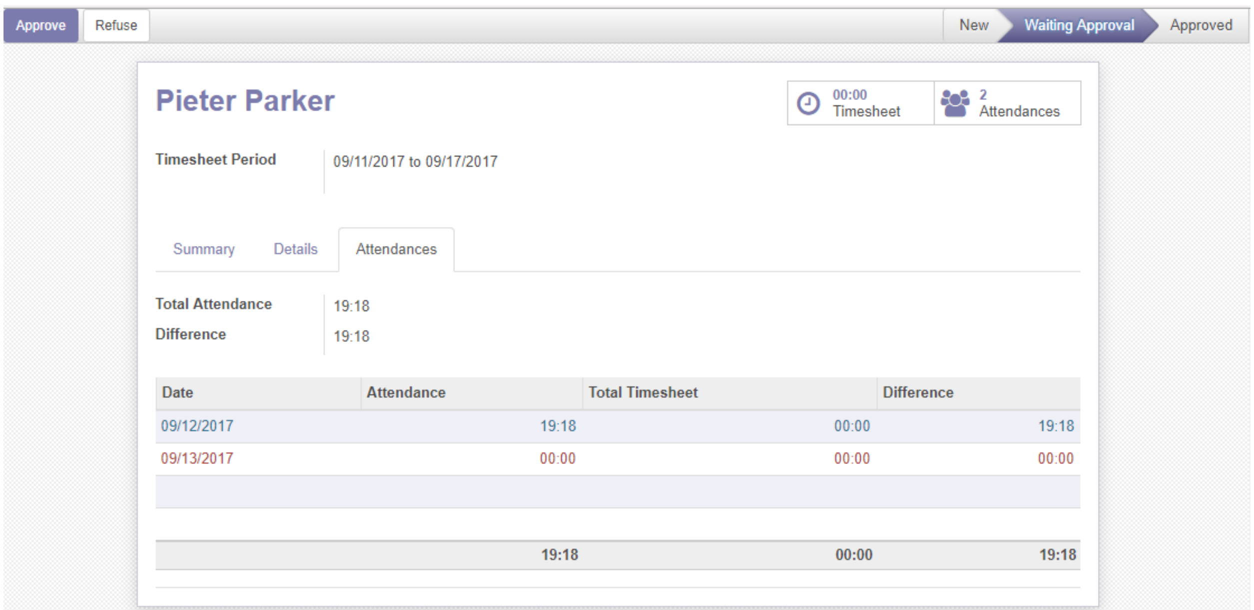
- Use dropdown list to select project and click **<Add a Line>** to add more projects
- Go to **Details** tab to add more details about the timesheet
- <Save> the timesheet and it will be automatically submitted to Manager for approval.

Approve \ Reject Timesheet

Decision on a submitted timesheet is taken by a managerial level officer. Login as Admin or a managerial level officer to view Timesheet management options

- **Timesheet -> To Approve -> Timesheets to approve**

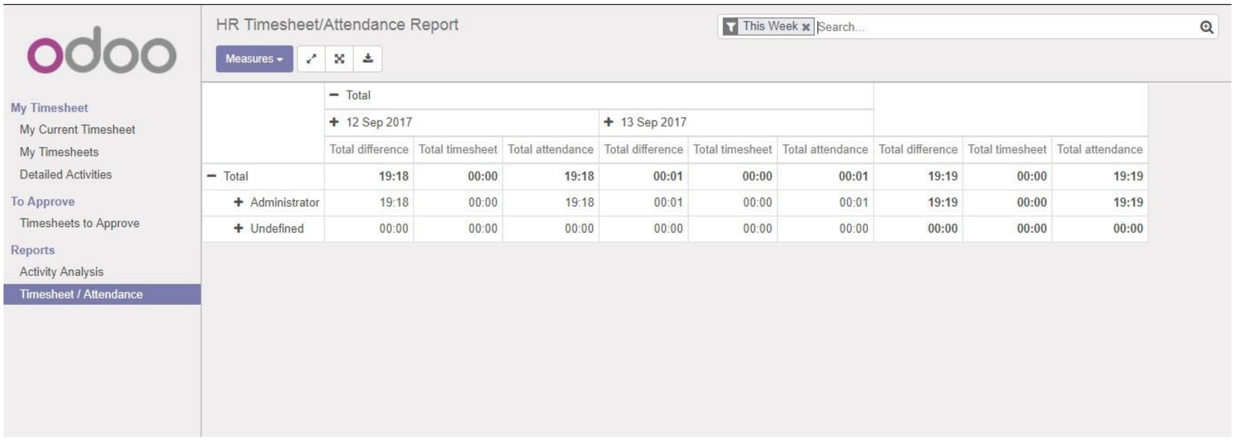
Select any Timesheet from the list to view Timesheet status. Here you can see attendance of the respective employee is integrated with time sheet for better decision making.



Time sheet Report

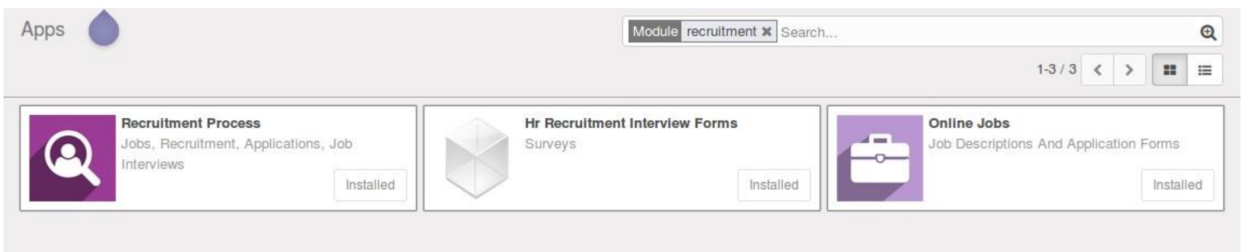
Concerned officer can view reports on Timesheet from following menu. Detailed analytical view is available in following menu

- **Timesheet > Reports**



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.

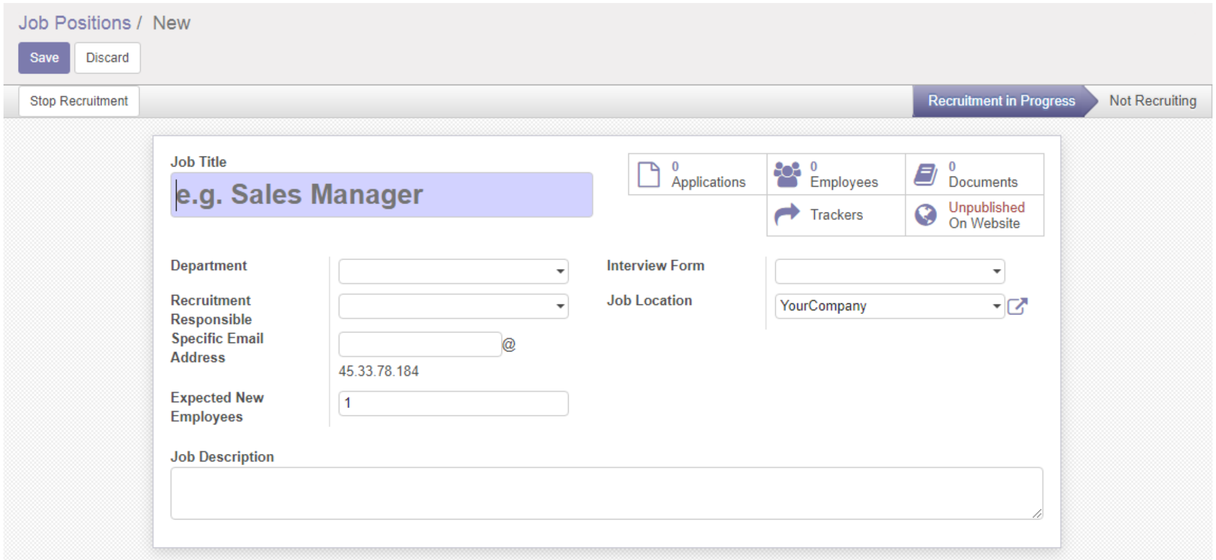
Create job Openings

To create a job opening you must login as Admin or designated officer

Recruitment -> Configuration -> Job Position -> Create

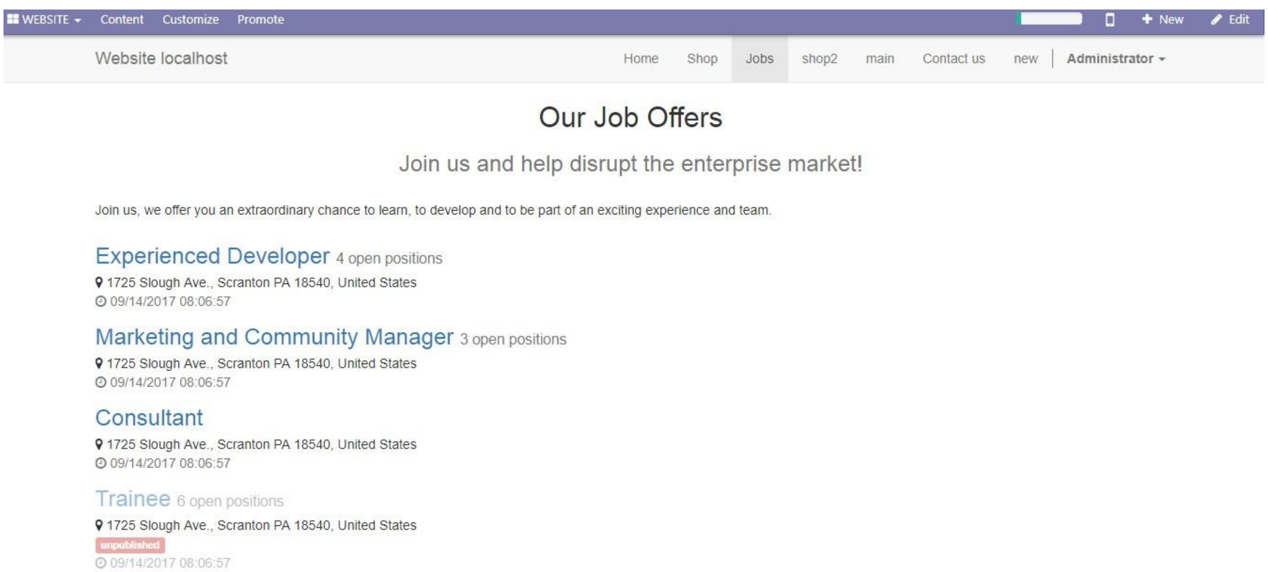
Or

Recruitment -> Job Position -> **Create**



- Fill the Job details and publish to Website

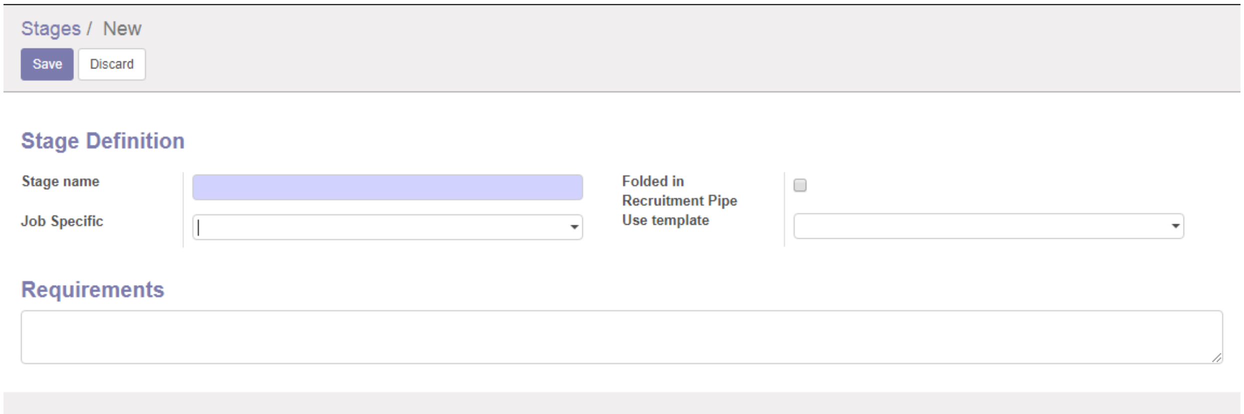
Now you can see the Job is listed on your Website under **Jobs** Tab



Define Recruitment procedure

Each company have its own recruitment process. You can define your own recruitment stages for recruitment.

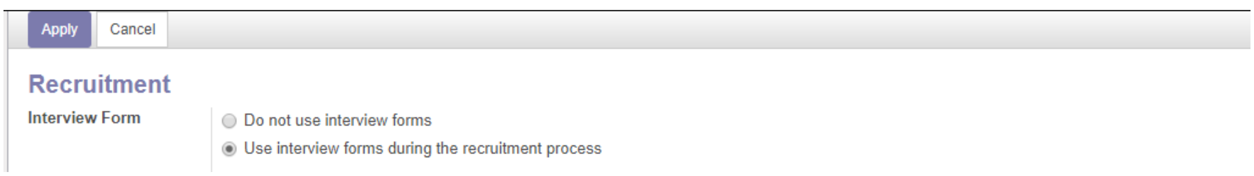
Recruitment > Configuration > Stages > Create



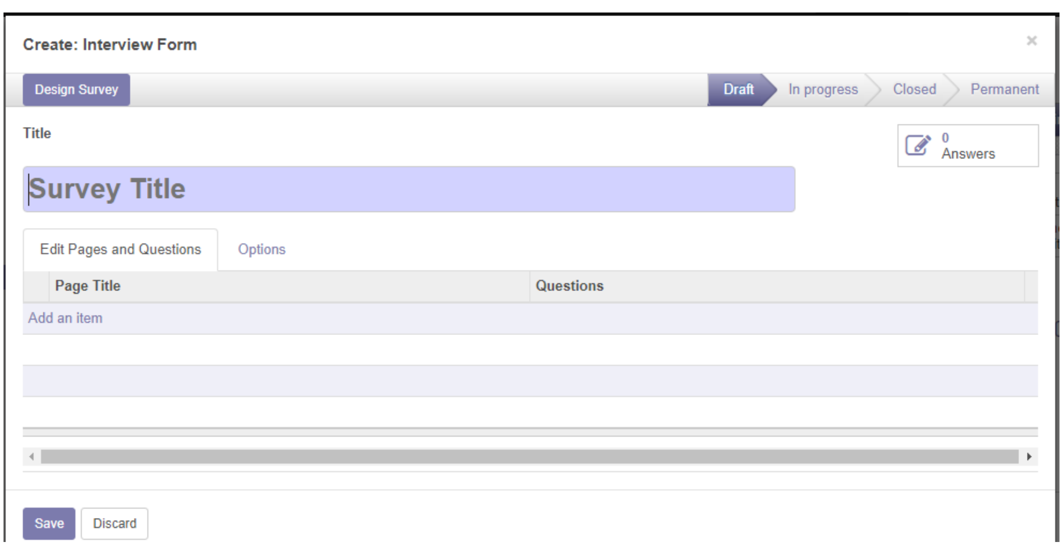
*"Use **Job Specific** Dropdown option to restrict the stage to specific job positions"*

Create Recruitment Form

To choose whichever Survey/questionnaire form to be filled by candidate while applying for job, Activate same option from **Settings** menu.



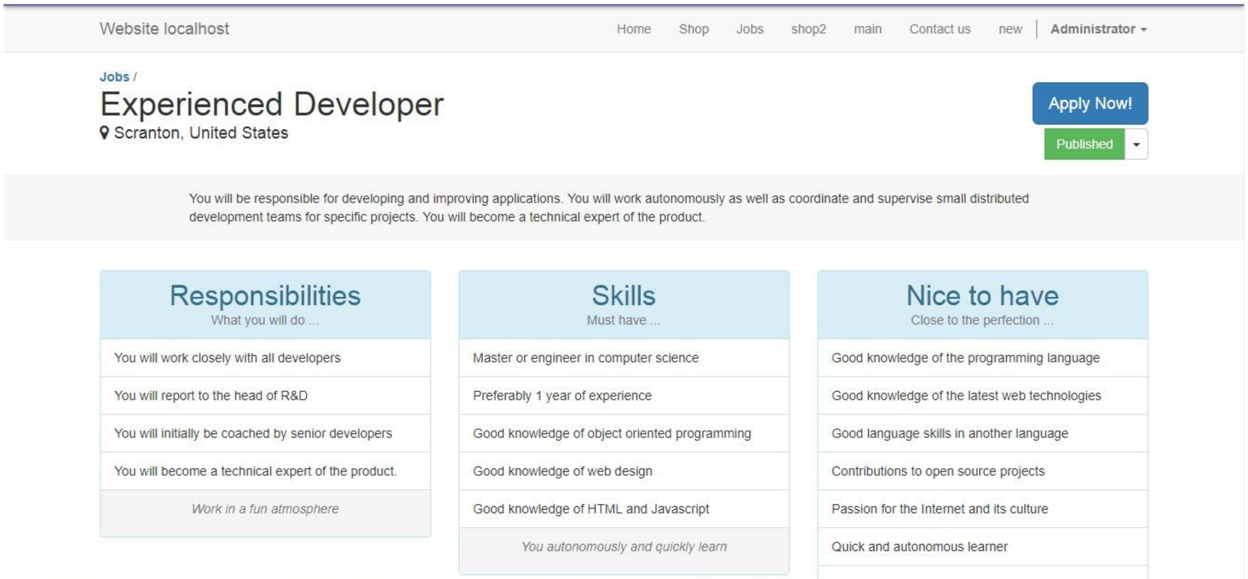
Once you enable the option you can see an option in Job creation window to add Questionnaires

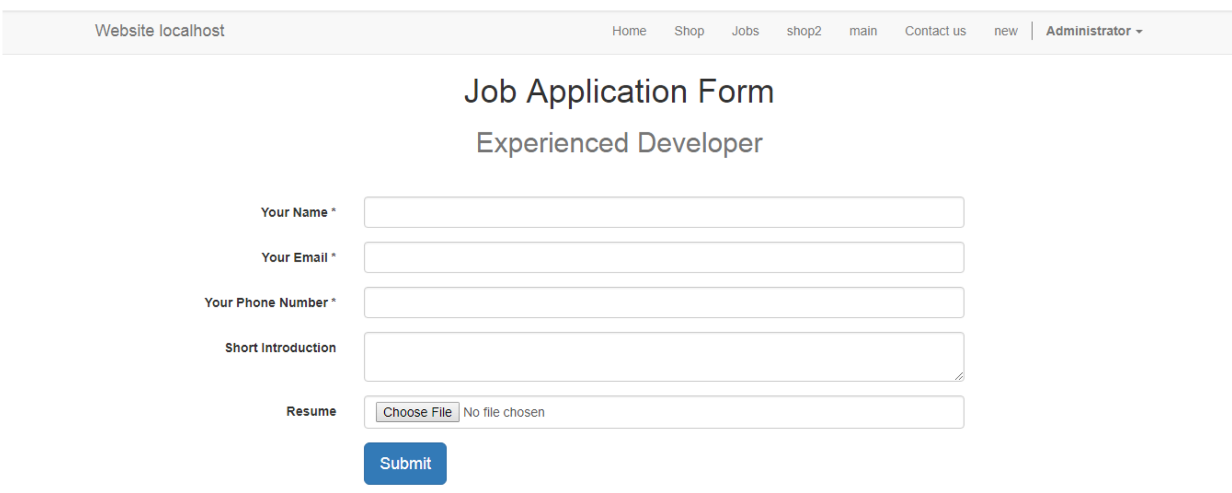


- Use Add an Item to add fields to your form
- After completion **<save>**

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.



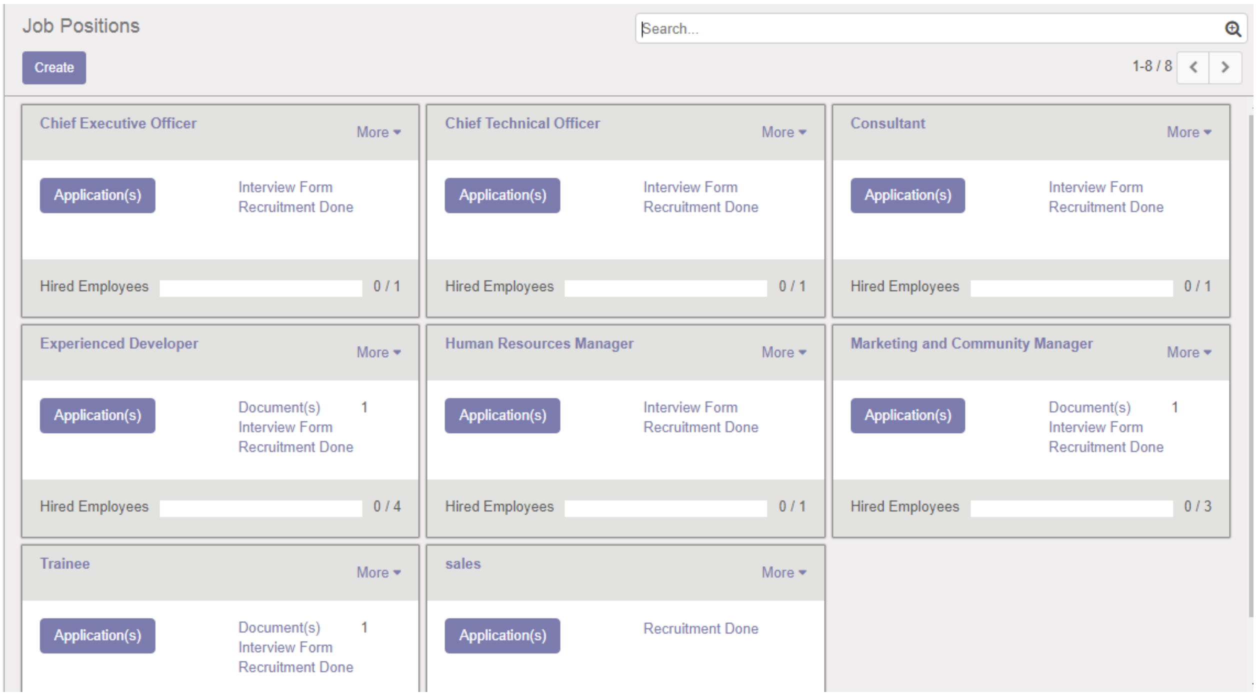


By clicking on <Submit>. User submit his application.

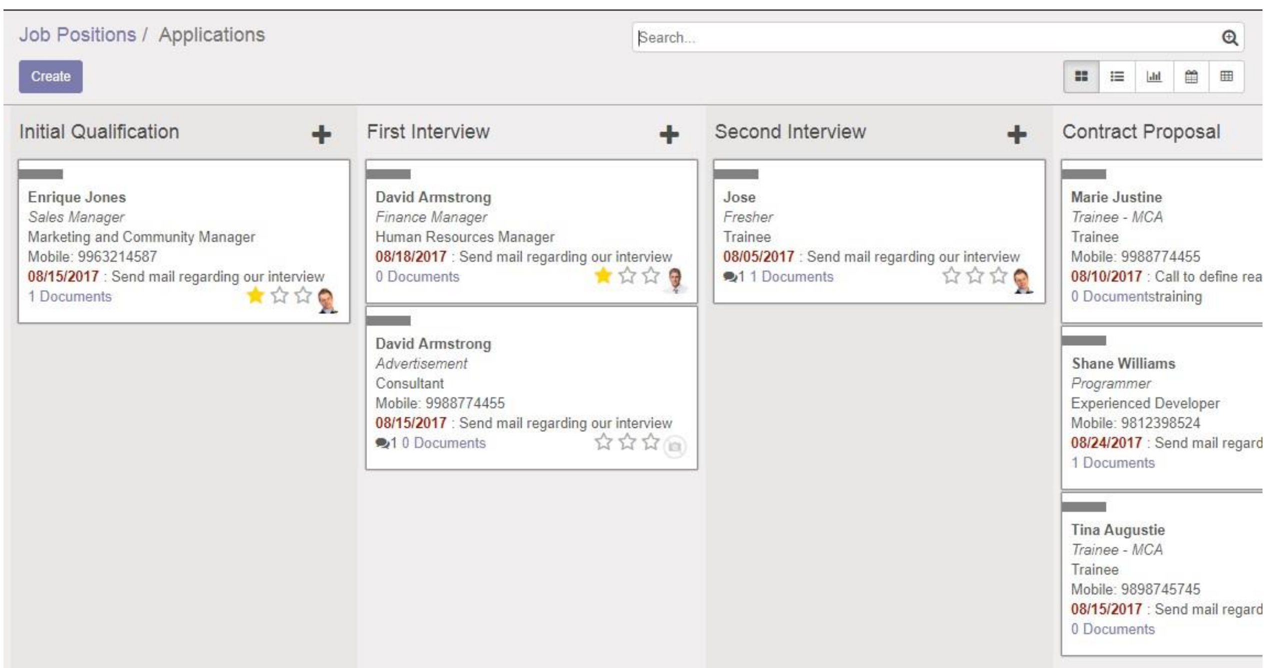
Process Job Application

Recruitment administrator can view all the application and related personal information listed in his dashboard.

Recruitment > Job Position



- Click **<Application>** View the applicants and their recruitment status.



- 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 were 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

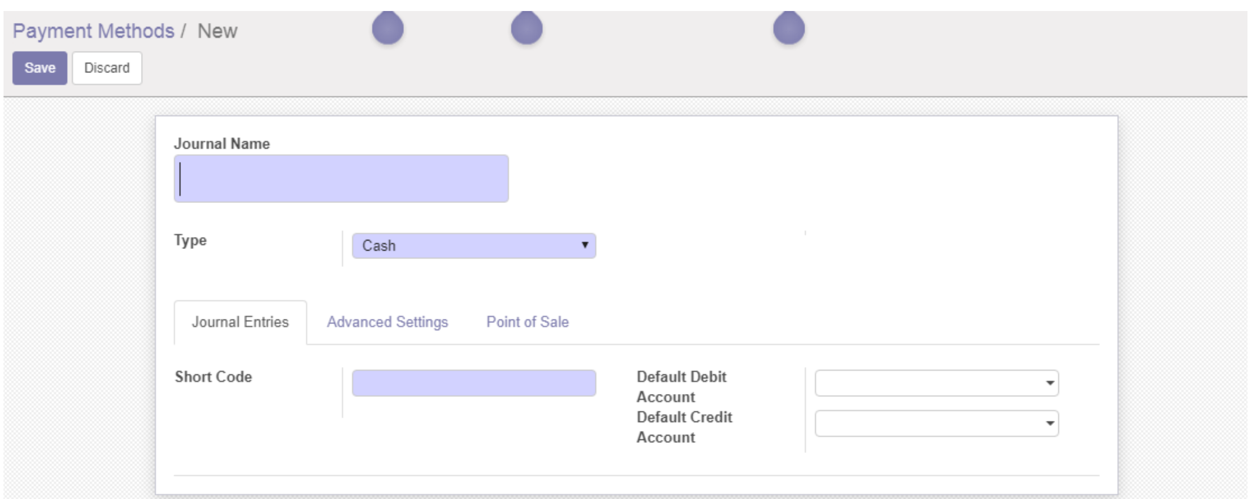
Manager creates and configures each POS nodes in Odoo POS. The system administrator can assign this POS node to appropriate users from 'Point of Sale' tab in the user profile. When a POS user login to the system, he will be directed to his POS dashboard. From there he can perform sales operations. A 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

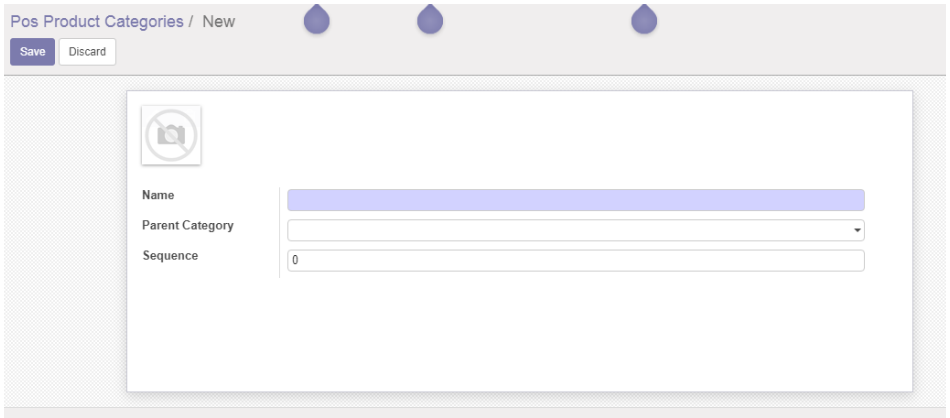


Click **<Advanced Settings>, <Point of sale>** tabs to find more customizable options.

Creating new product category

Your product list can be customized/categorized according to you 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



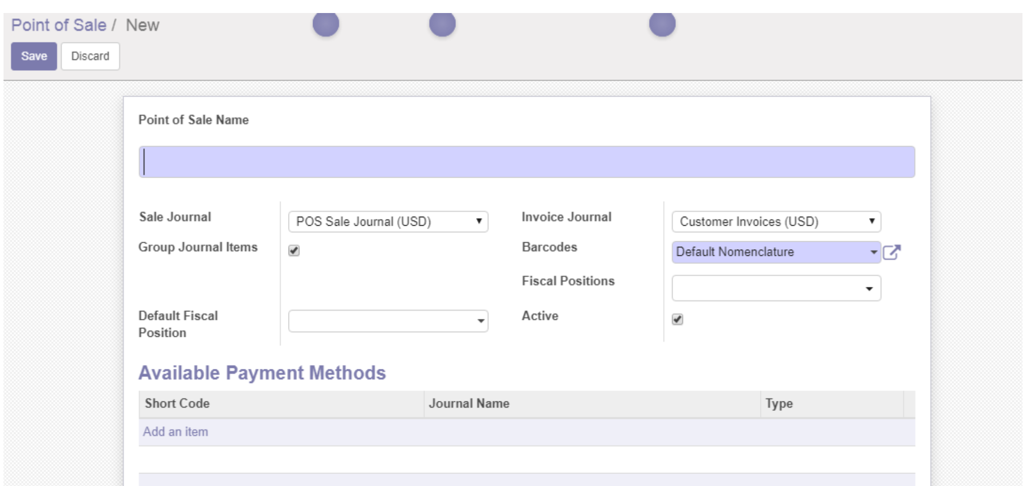
- Fill all the fields and <save> new category.

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

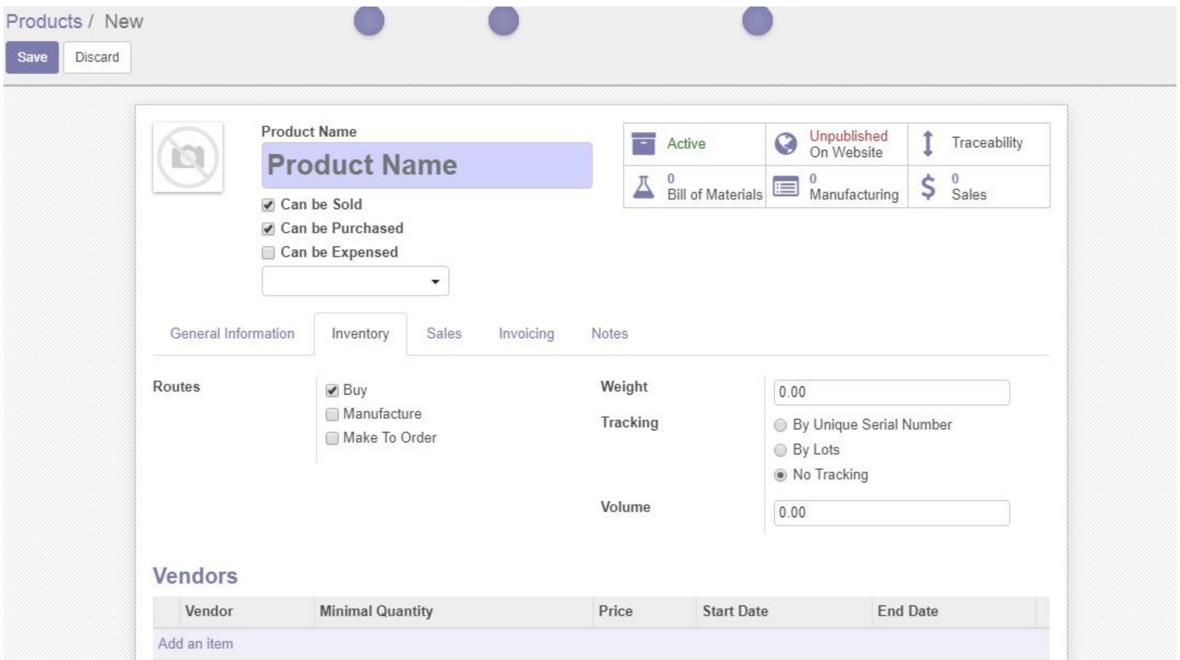


- Fill all the necessary fields including Journal, payment methods for POS etc. and click **<Save>.**

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

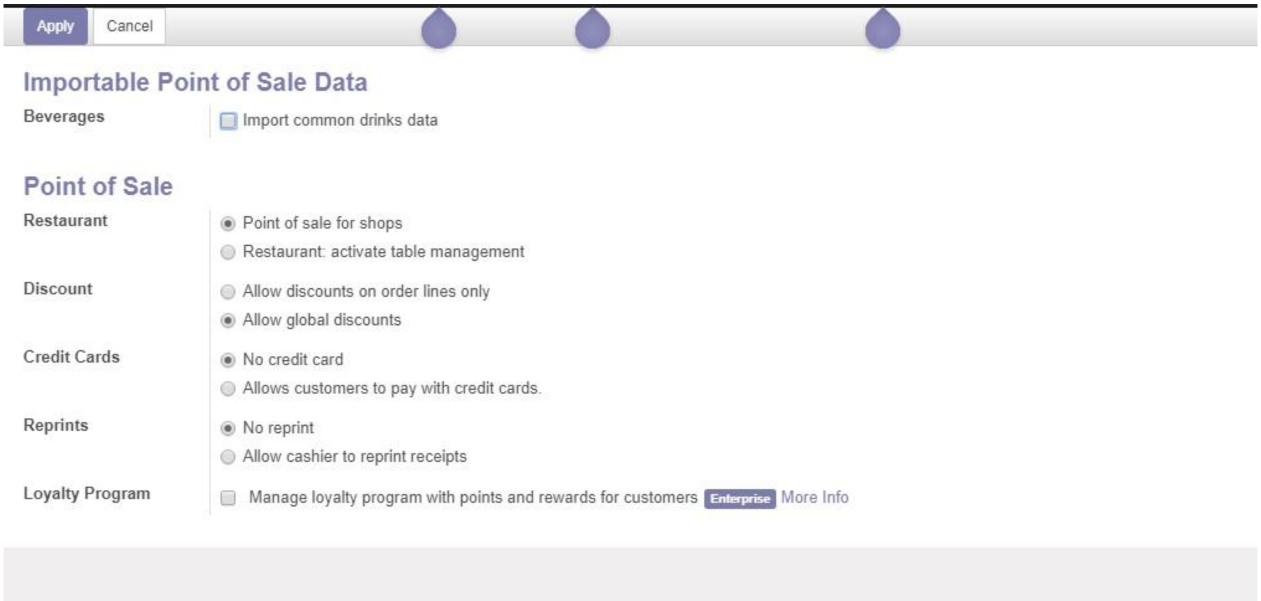


Fill the fields with product specification. Toggle between **General Info, Inventory, Sales, and Invoice** tabs to find more options and settings for the product and <**save>**.

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"

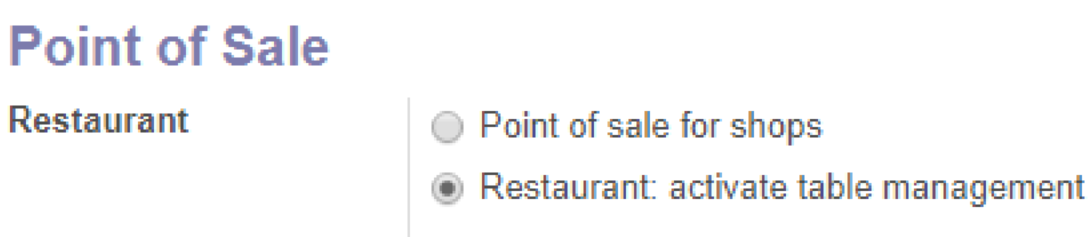
Other miscellaneous configurations.

You can find some useful and important settings like activating card payment, activating restaurant mode, etc. in **<settings>** menu under **<Configuration>** Tab



POS Restaurant mode configuration

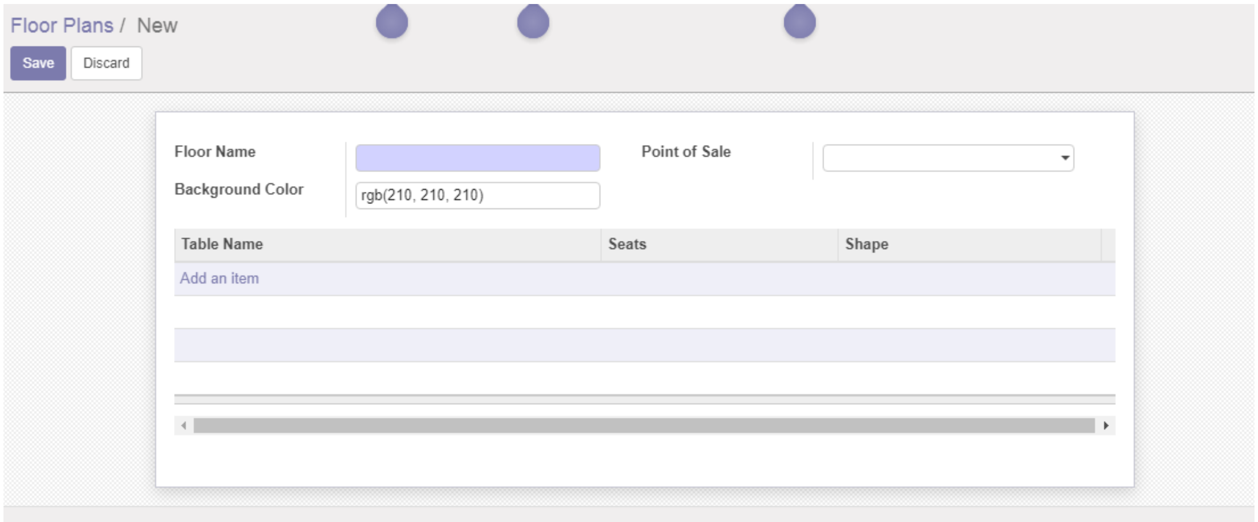
- Find Activate table management option from **<settings>** menu under <**Configuration>** tab.



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



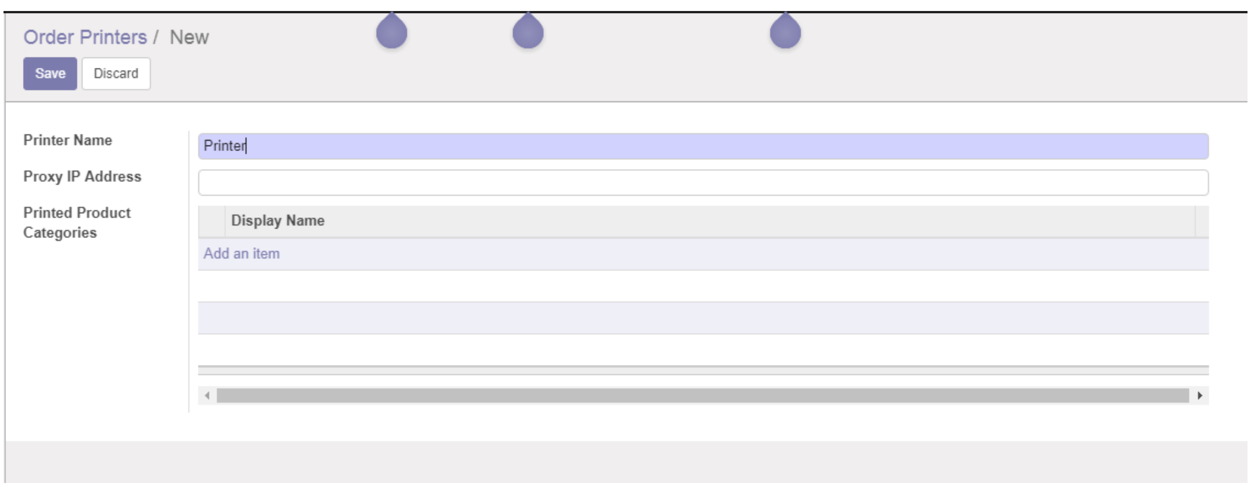
- Click **<Add an Item>** to add Tables and manage seating arrangements on that floor.

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

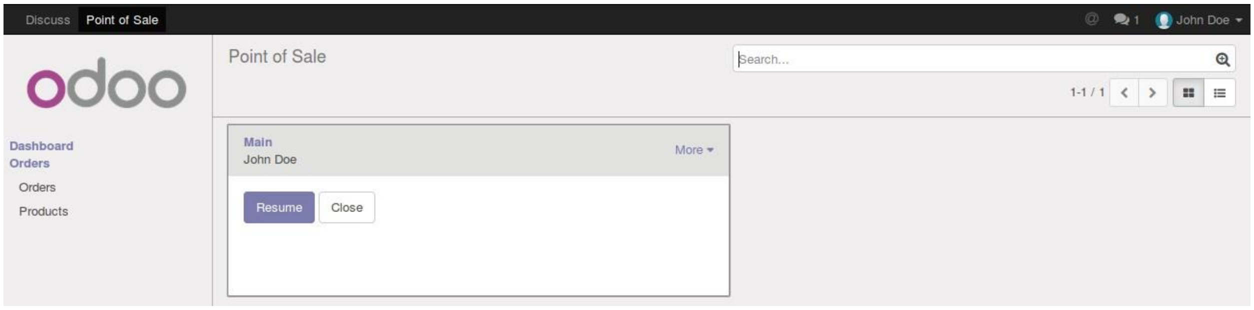


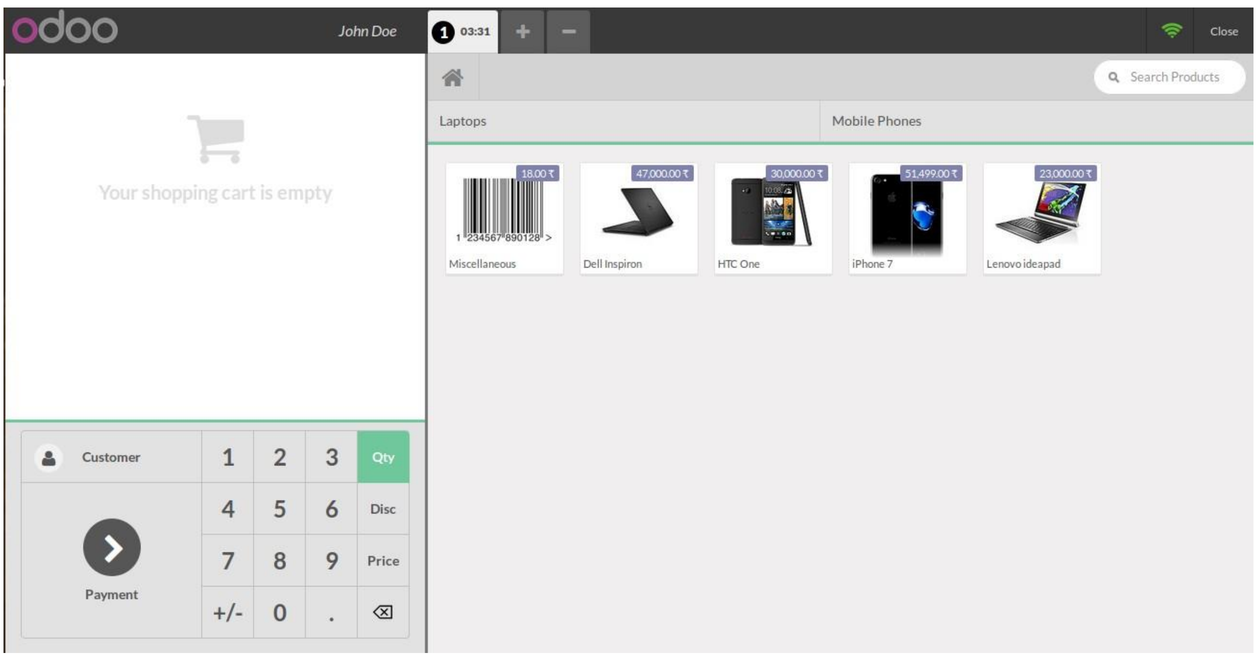
Fill the fields with printer info and **<save>.**

Sales management

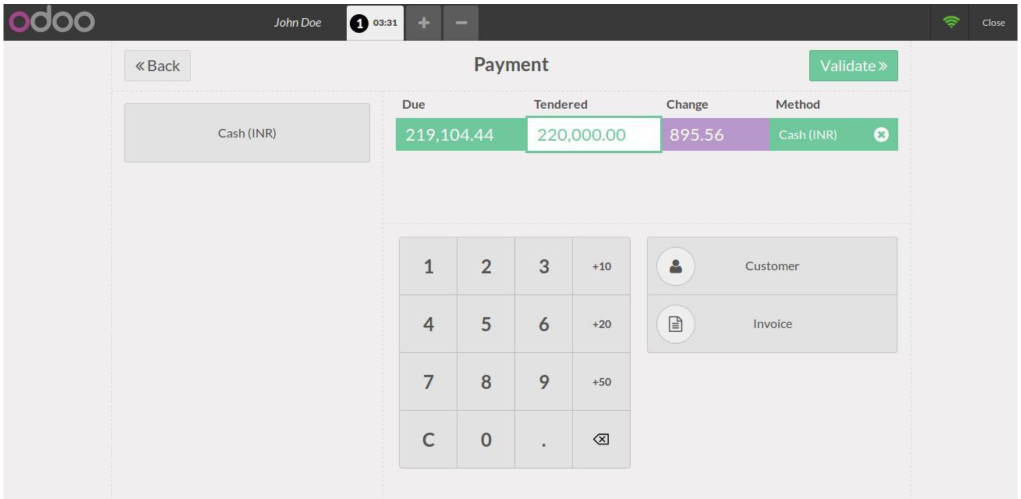
Making an Order

- 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





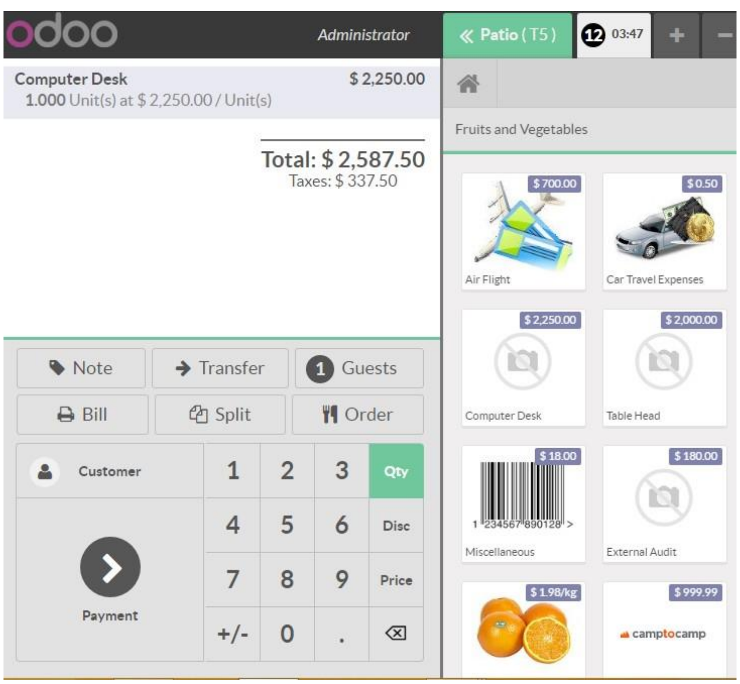
- Click on the product to add to Cart (the amount will be updated automatically)
- Use <QTY> button to enter no of quantities
- Use <Price> button to enter price manually
- Use <Disc> button to allow discount
- Click on <Payment> button to proceed to payment.



- 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)



- 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.

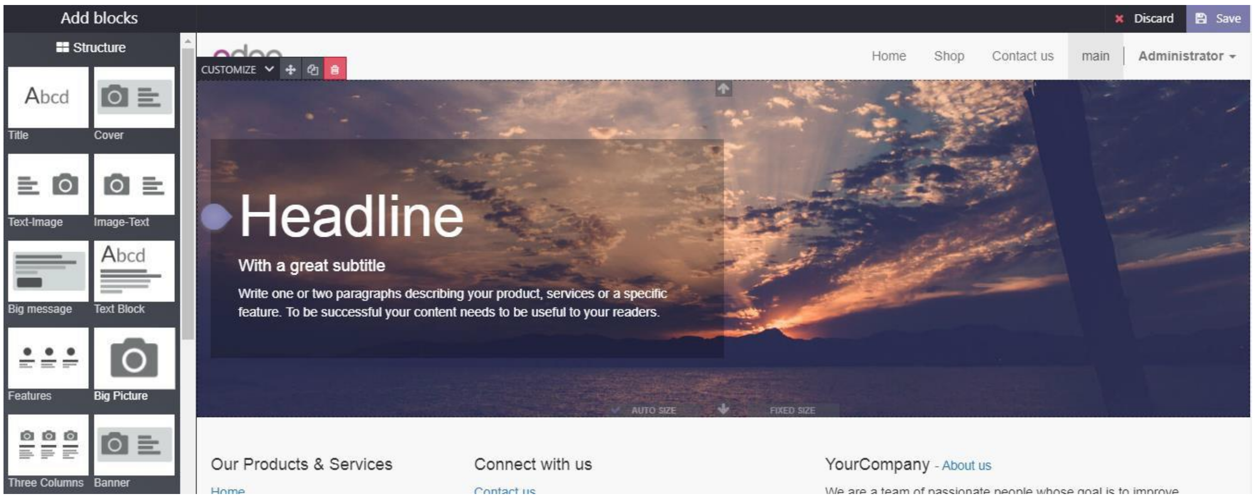
- Editor and Designer:

  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>**



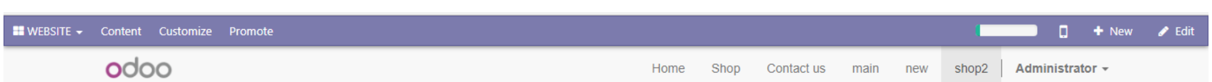
It will give you a default page and tools to design the page just **Drag and Drop the contents**

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'

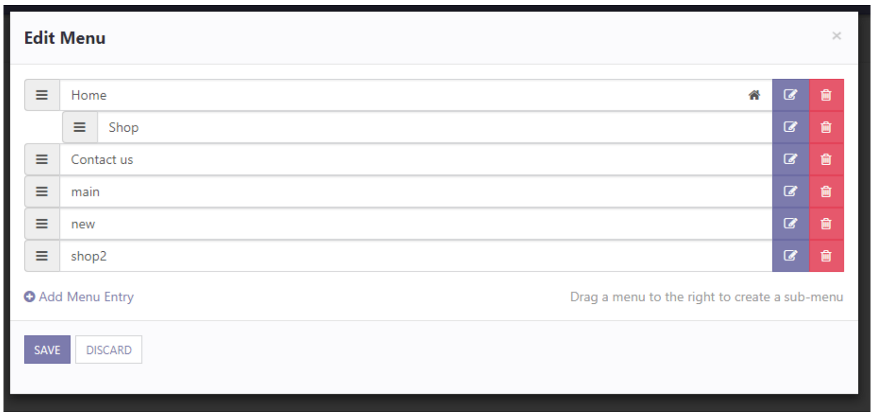


Customize menu and appearance

Menu and page customization

You can change the appearance of your website including Menu, and product view easily. To customize menu follow

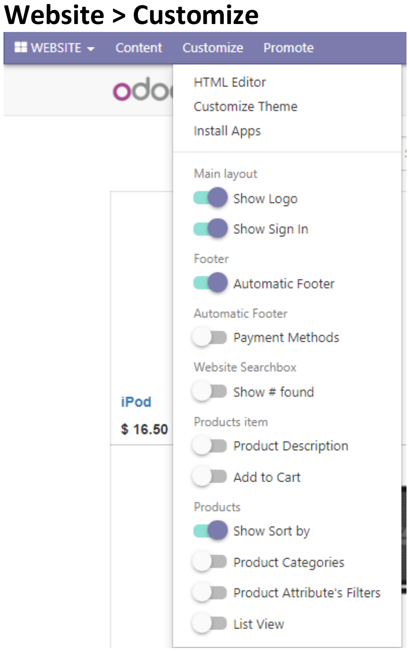
- **Website > Content > Edit Menu**



This window will assist you to create new menu options, create submenu and delete menu options.

Appearance customization

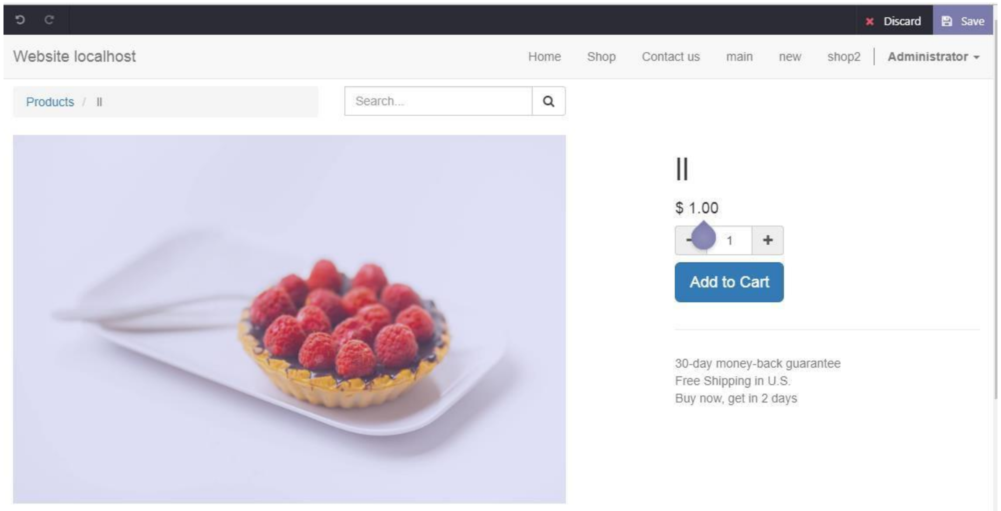
To change the appearance of the website like the way your products are listed etc. follow **Website > Customize**



Choose from many of the useful options available to make your website more user-friendly

List your products on site

- **Website > New > New product**

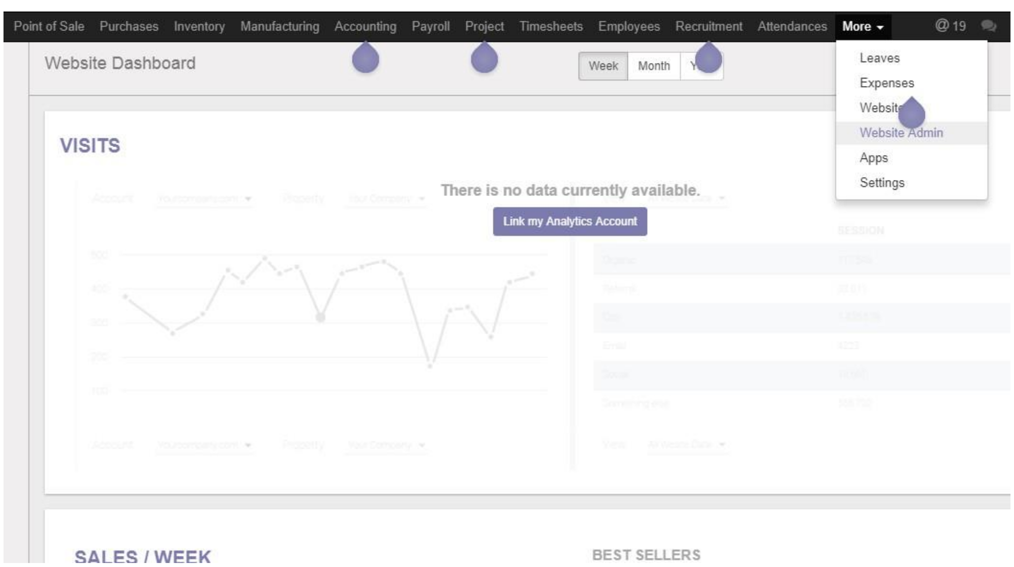


- Fill the name, image and cost and click **<Save>**

SEO Integration

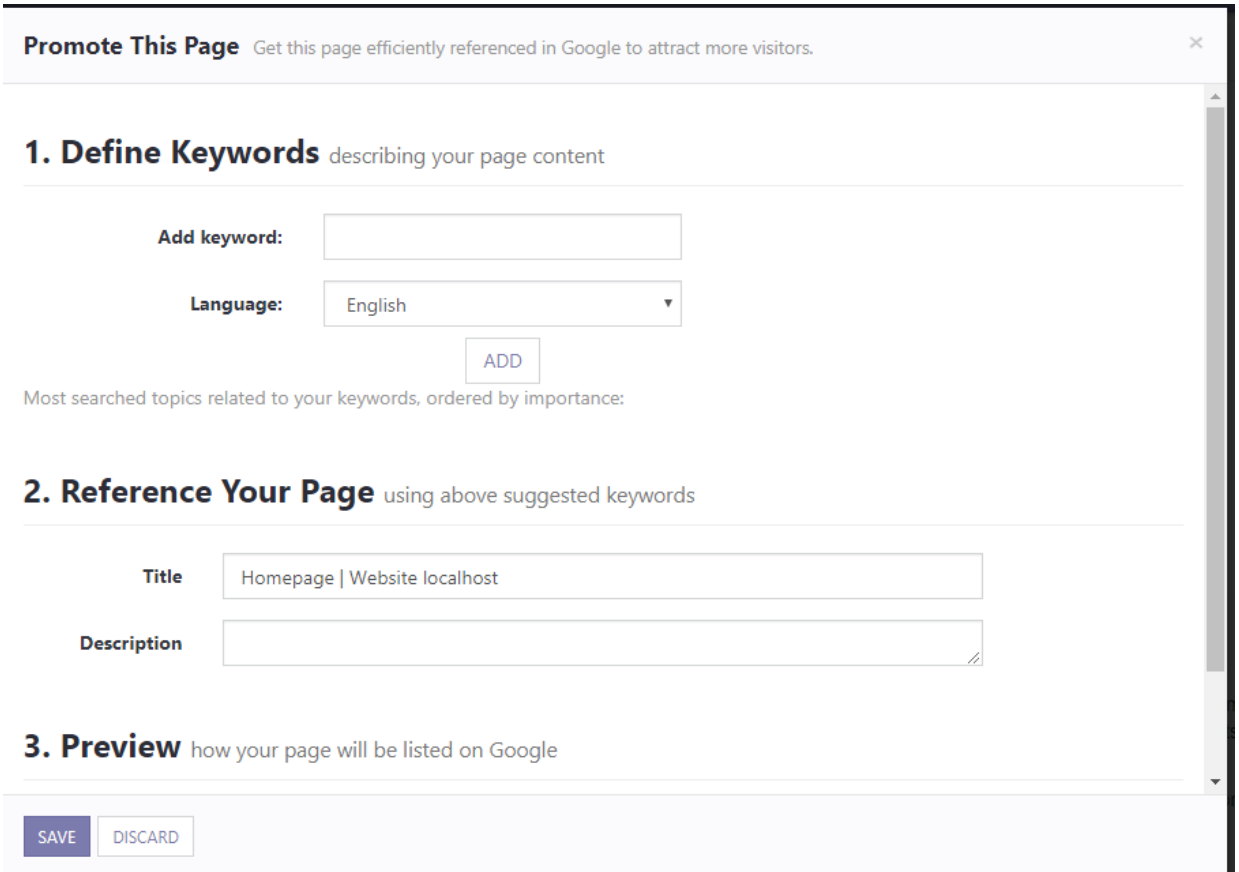
Odoo SEO tools combine with Google to check the relevancy of your content in real time. Get more visitors with a better-targeted content. Admin can access this facility from

- **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**



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

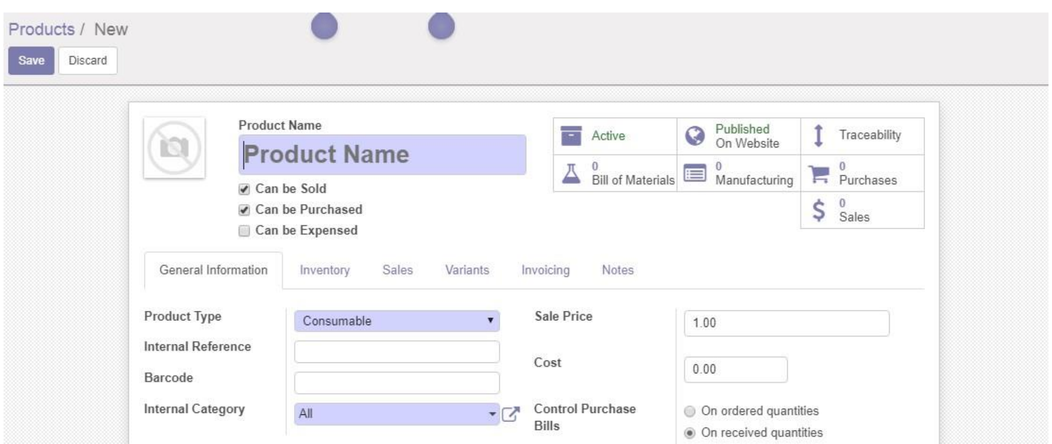
By default there are two types of user in Website related modules.

- **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

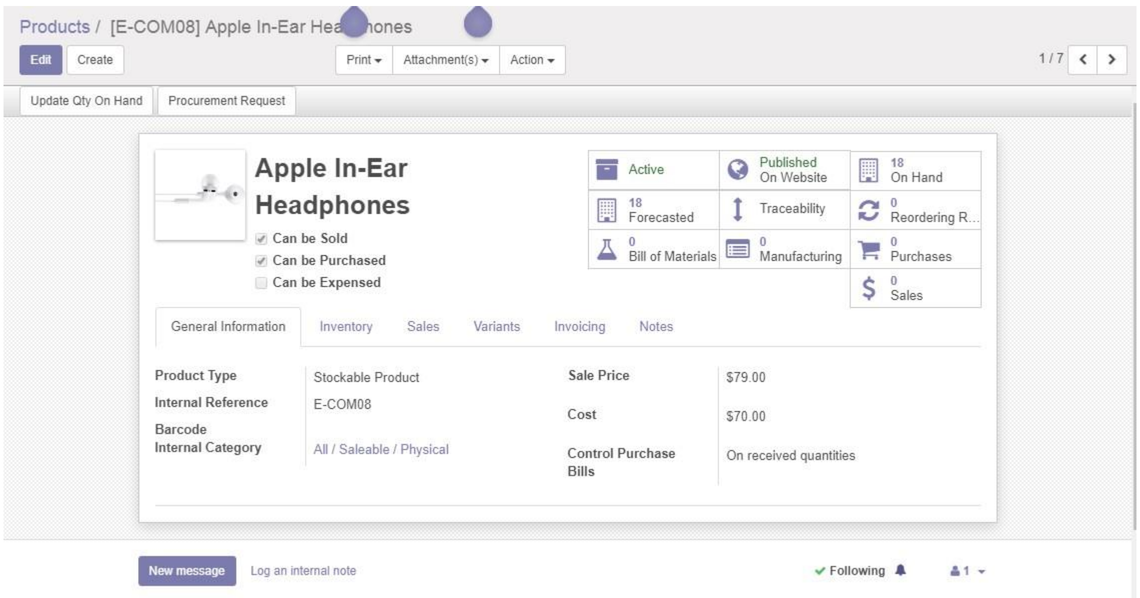


Fill all necessary fields by switching to ‘inventory’, ‘sales’, ‘variants’, ‘invoicing’, tabs and <save> the product. It will be added to your website

Edit Product Details

You can **Update/Edit** a product details buy just clicking on the product image from

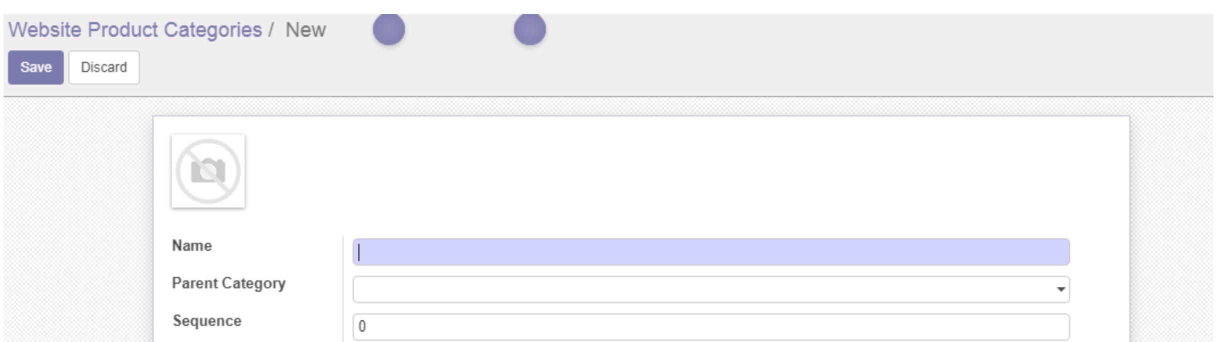
- **WebsiteAdmin > Products**



- 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

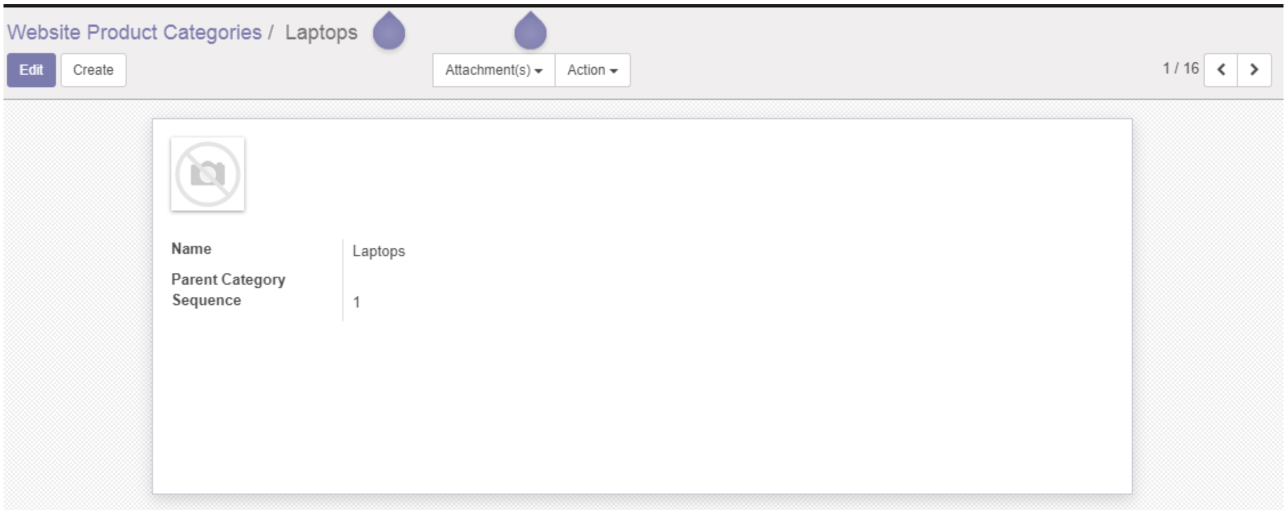


Choose the parent category (if applicable) and save
Edit Product Category

Delete or Edit a product category

Website Admin > Configuration > Website Product category

- Click on any of the listed category to update or delete it

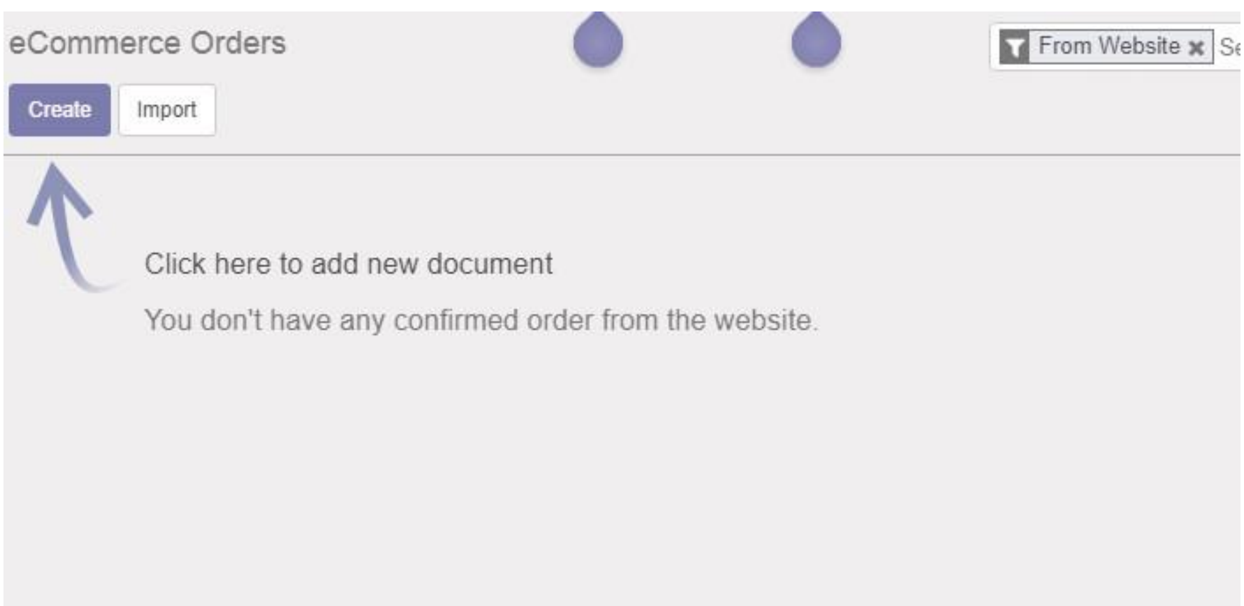


Order Tracking

View Order

To view orders received to you web site

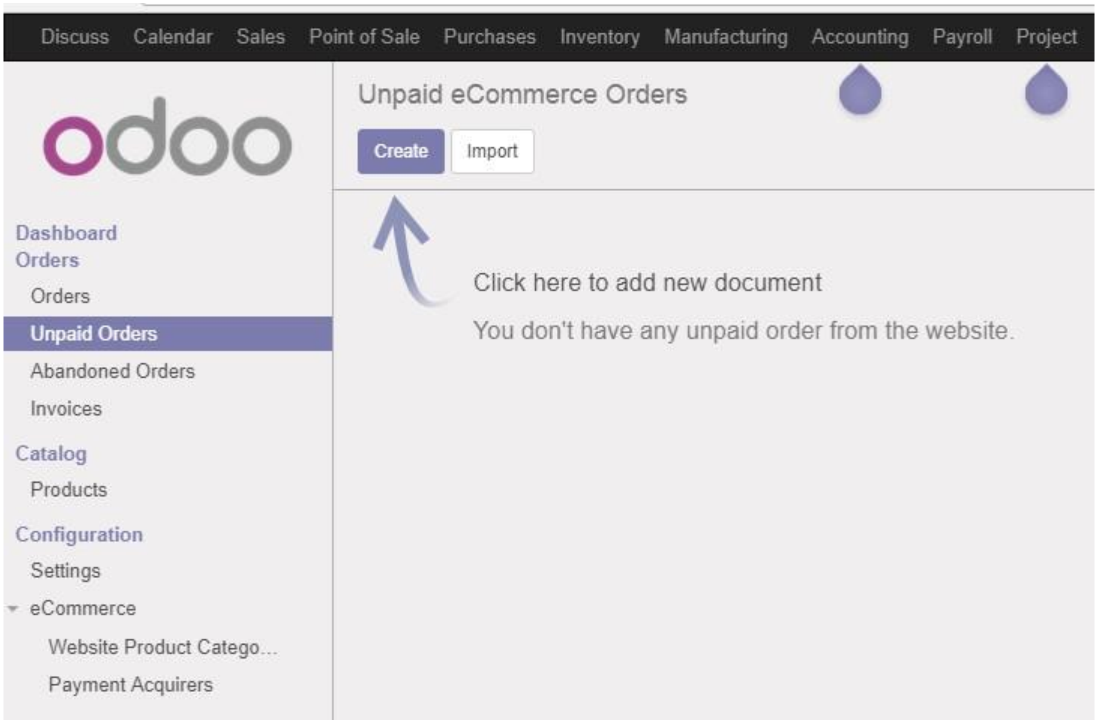
Website Admin > Orders > Order



Note: - There is an option to create order manually if needed.

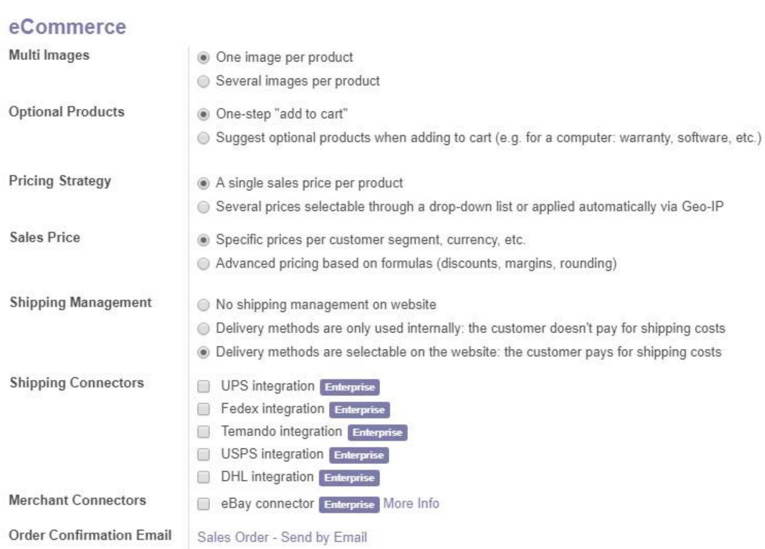
View Unpaid Order

- **Website Admin >Orders > Unpaid Order**

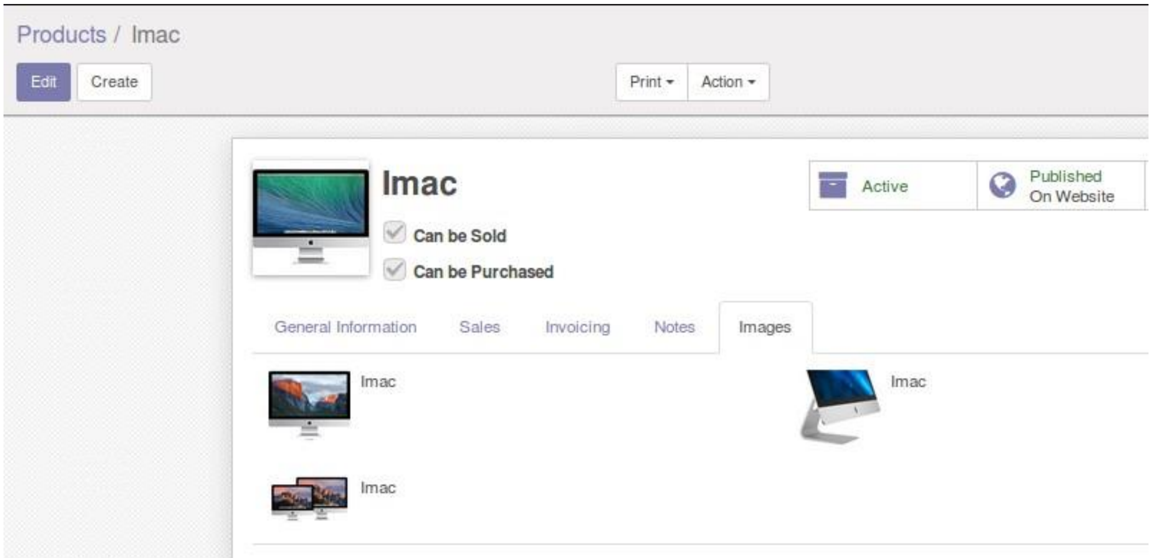


Website Settings

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)

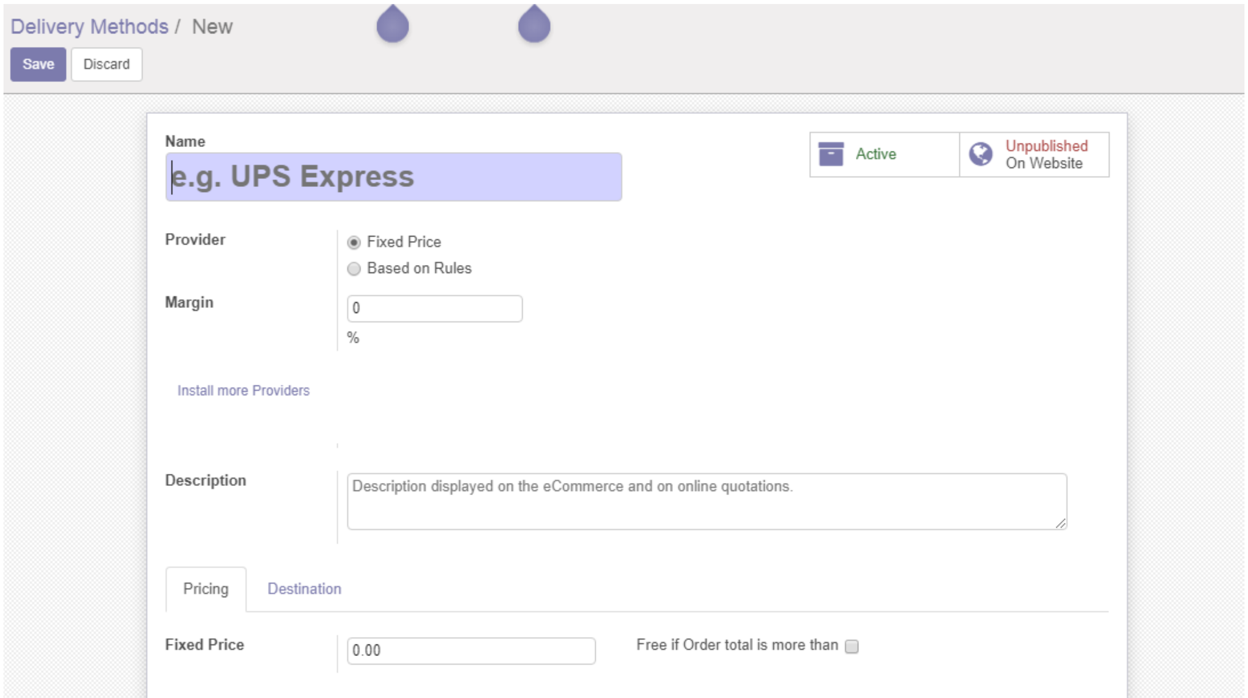


(Adding multiple images)

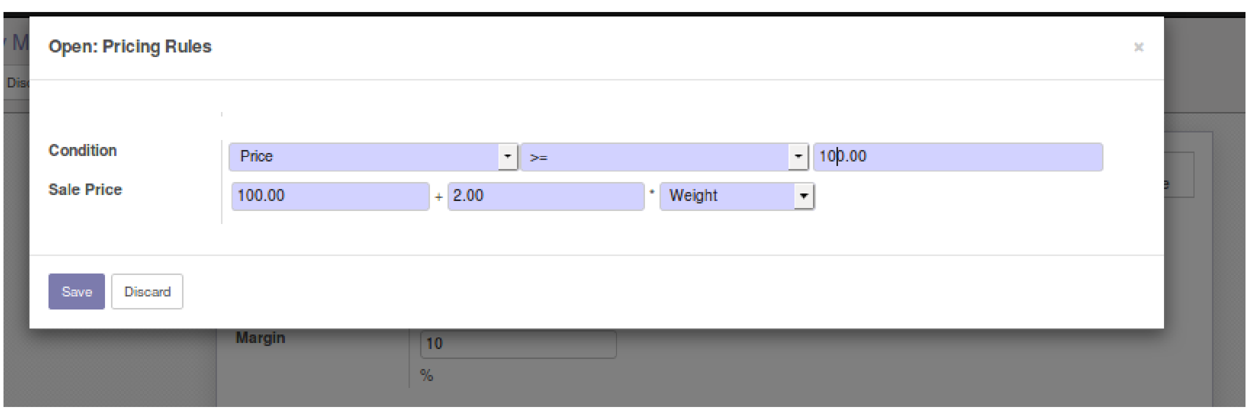
User view of a multiple image enabled product
Like ways administrator change the settings to improve user experience from the above panel

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 Rule**s two option available to set up payment option. Using **Based on Rules option** you can customize delivery method.

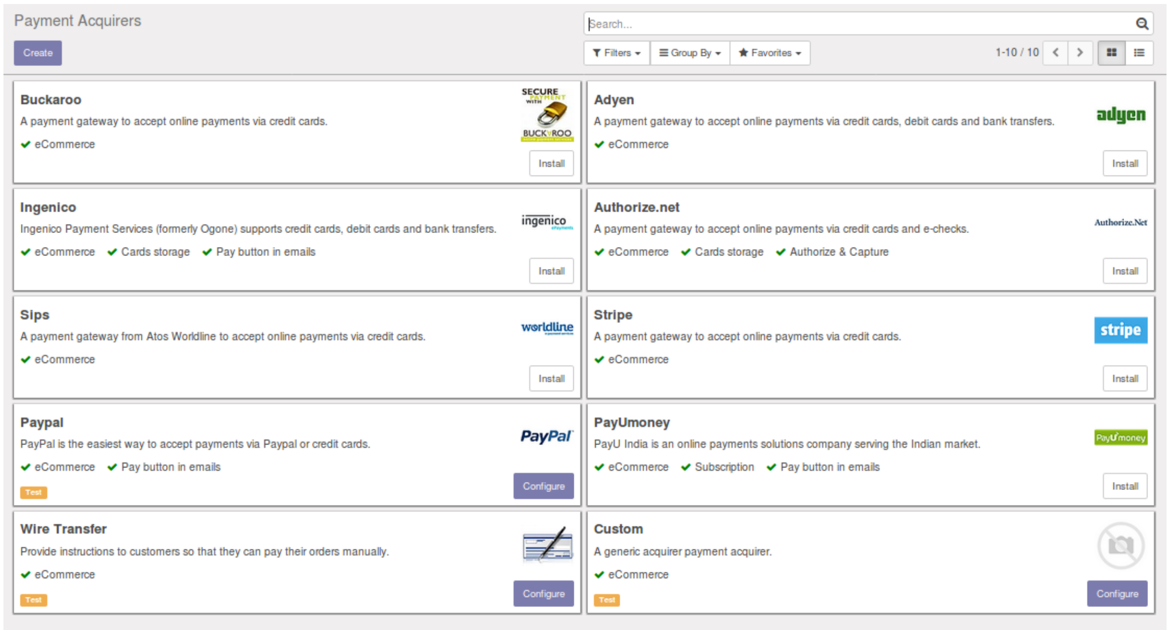


Note:- the very important things is that you must click 'Published on Website' button before you quit the wizard to make the new delivery option available to users

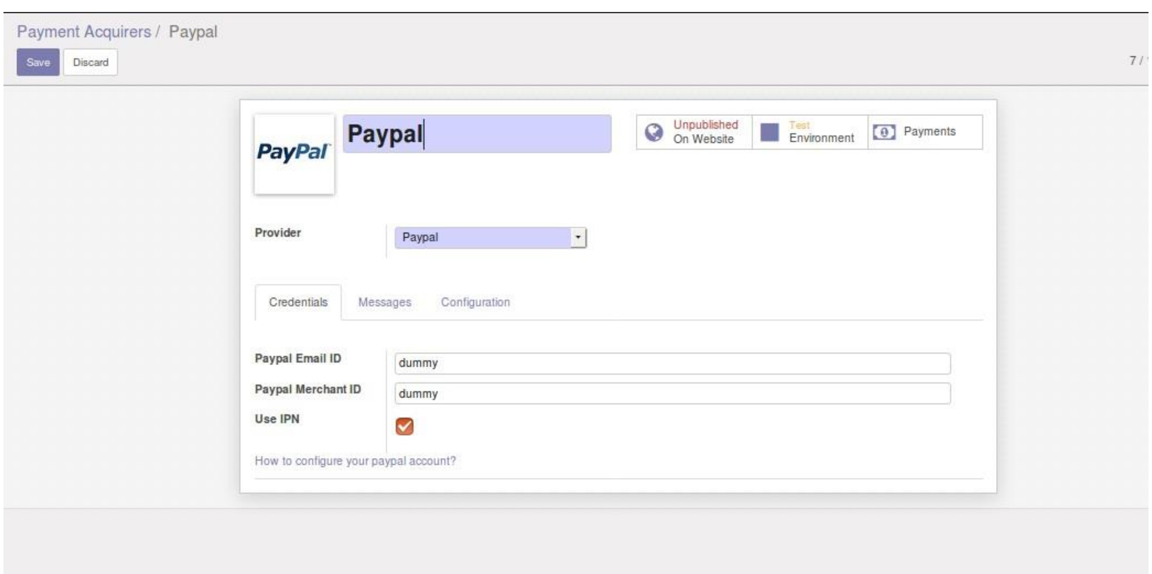
Configure Payment methods

- **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

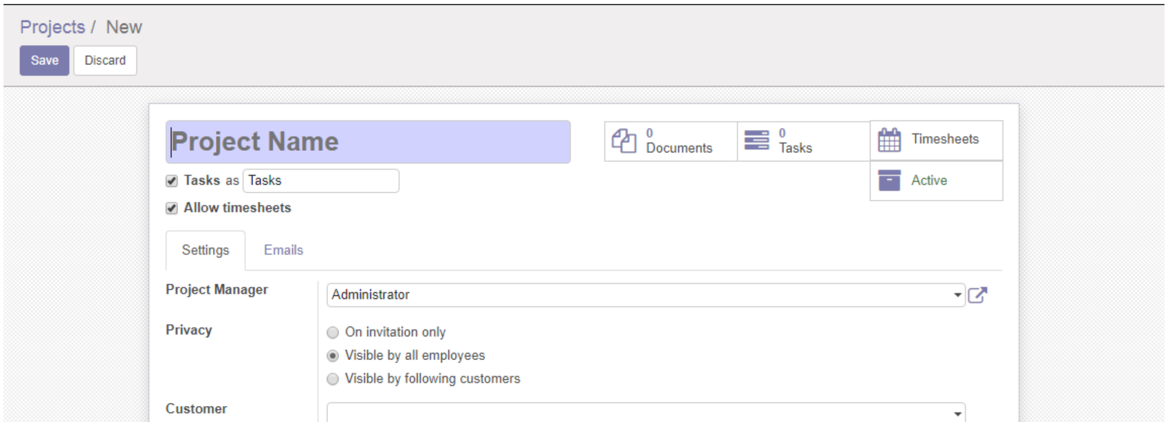
- **Project Manager:** - Who can create and manage projects.
- **Project User: -** Who can access the tasks assigned to him

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"***

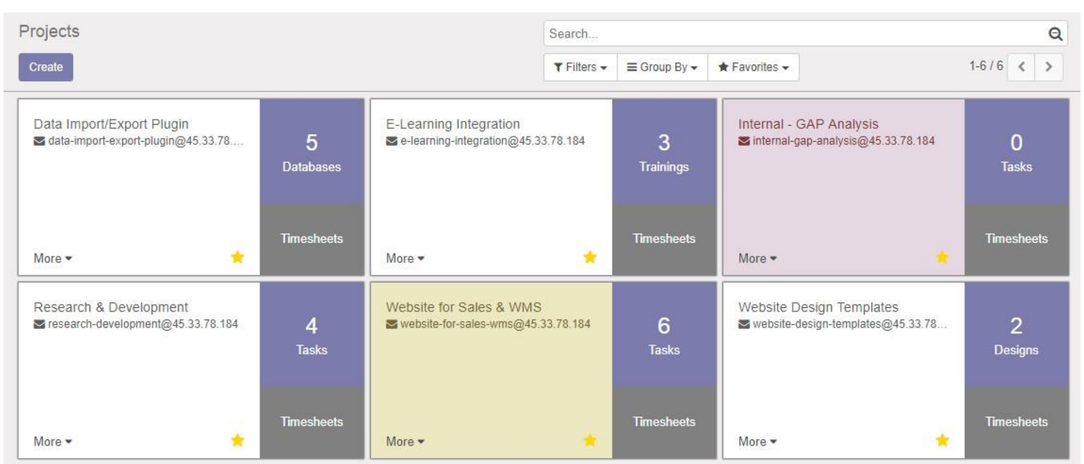
Note: - *You can Update/Delete any project from the same menu i.e**. Project > Configuration > Projects***

Create Task

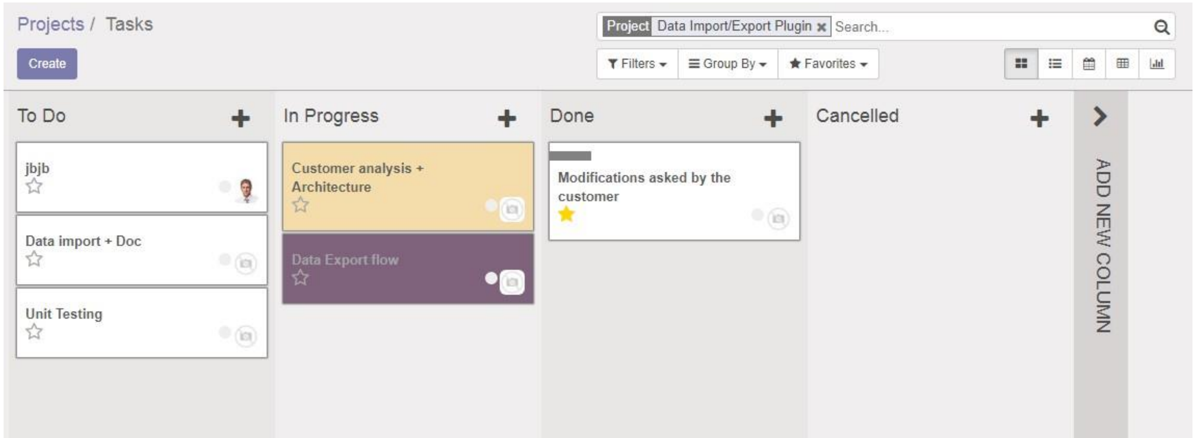
By creating a Project you have just created the template. Now it is the time to create tasks in your Project. You can create a Task by two methods.

Method 1:

- **Project > Dashboard**



- Click the project you wish to add Task.

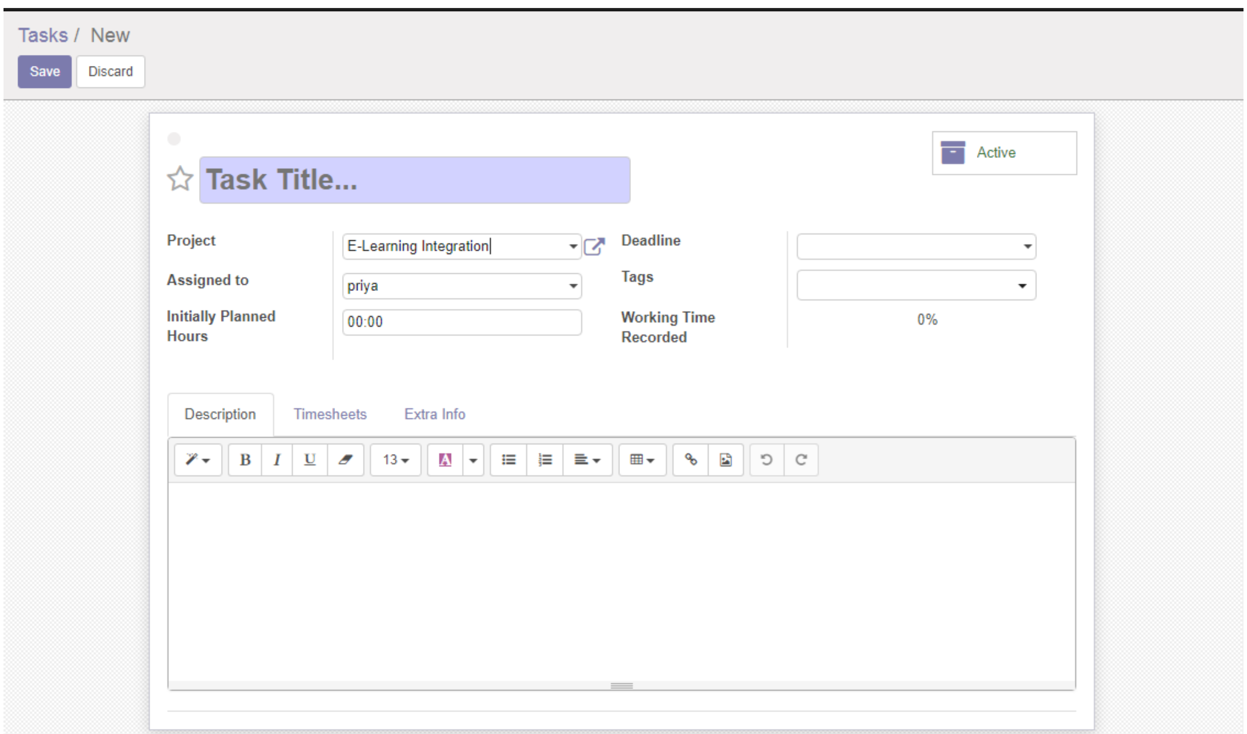


Listed are the different Stages of a Project.

- 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**



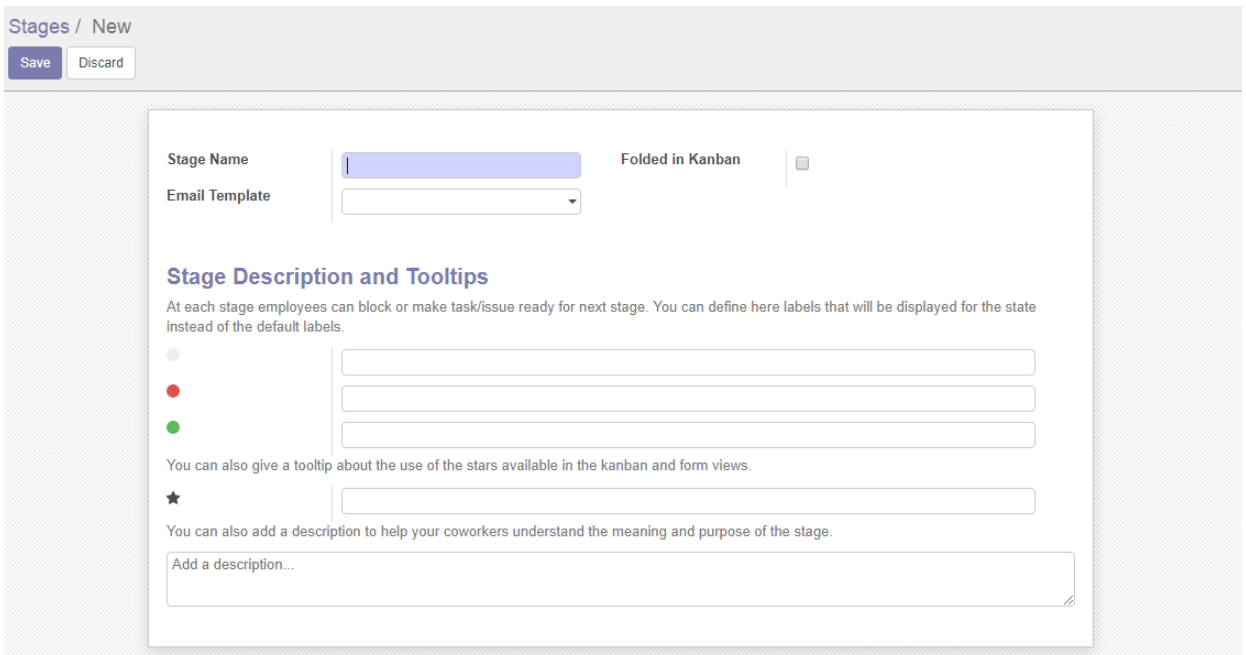
- Choose the Project
- Assign the Task to user
- Once you choose the project you can add Timesheet for this task
- Mark **<Active>** and **<Save>**

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**

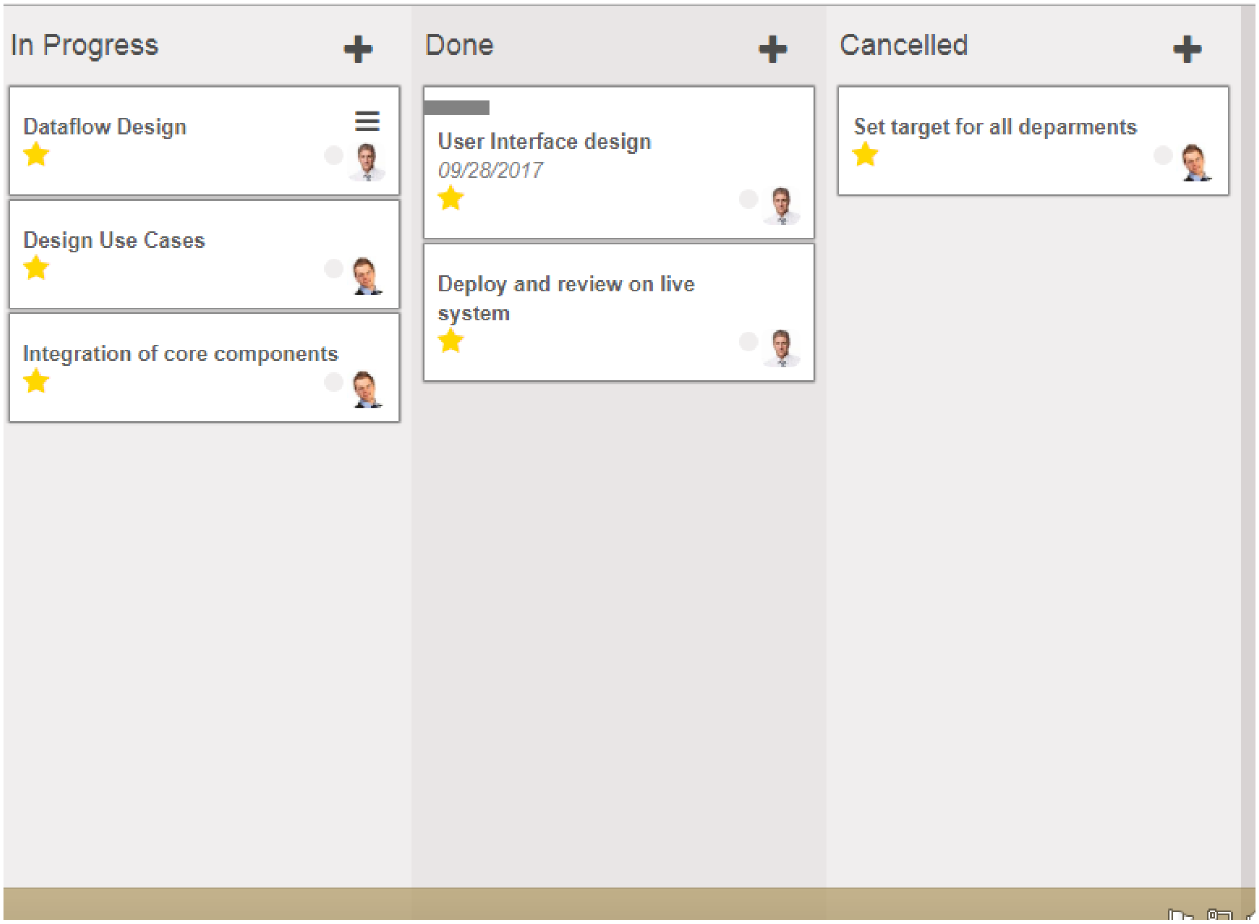
Note*: - you can Update/Delete any stage from the same menu i.e.* ***Configuration > Stages***

Timesheet management

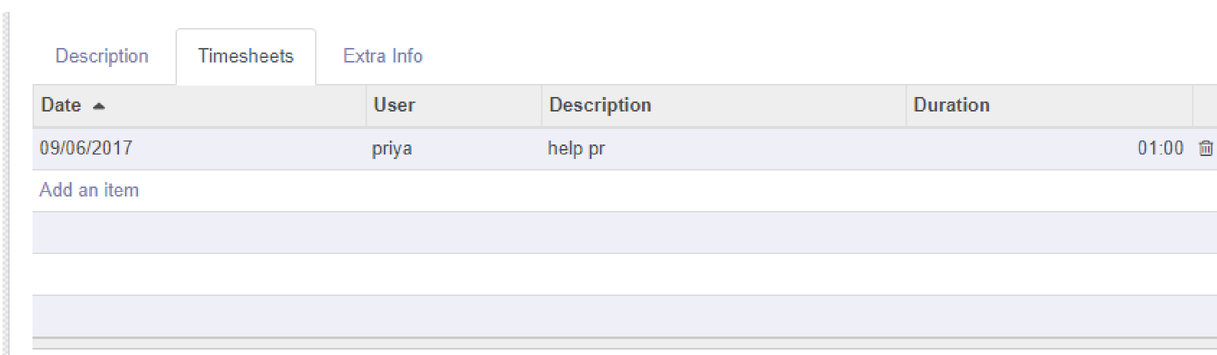
Timesheet management is a very important aspect in Project management. After project manager creates a project and assigns its task to different user, all such users can access project Timesheet and add their contribution to it. The same operation can be done through Timesheet Management Module of Odoo. To enable this feature you must install Timesheet App from Odoo.

To add a timesheet

- Select the project from Dashboard



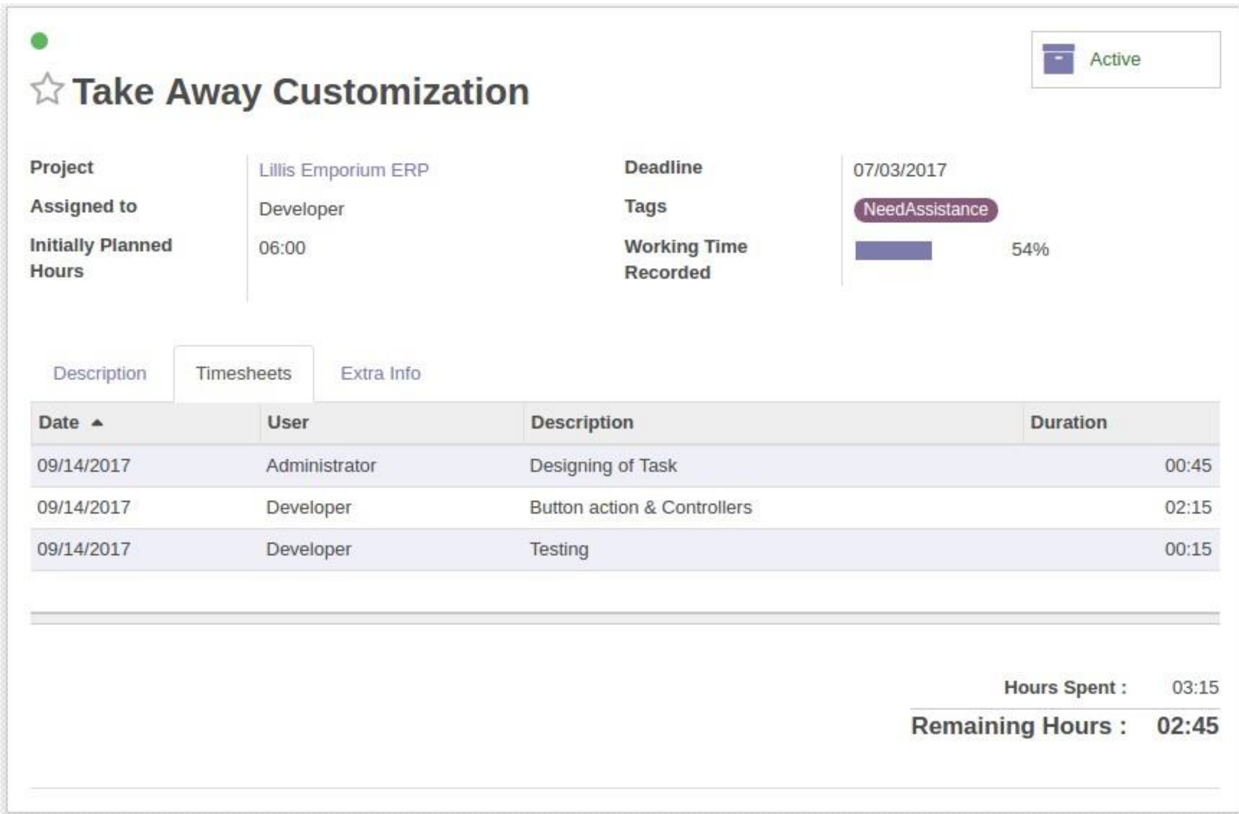
- Select the task you wish to add a Timesheet
- In Task details, under Timesheet menu click **Add an Item**



- 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"*



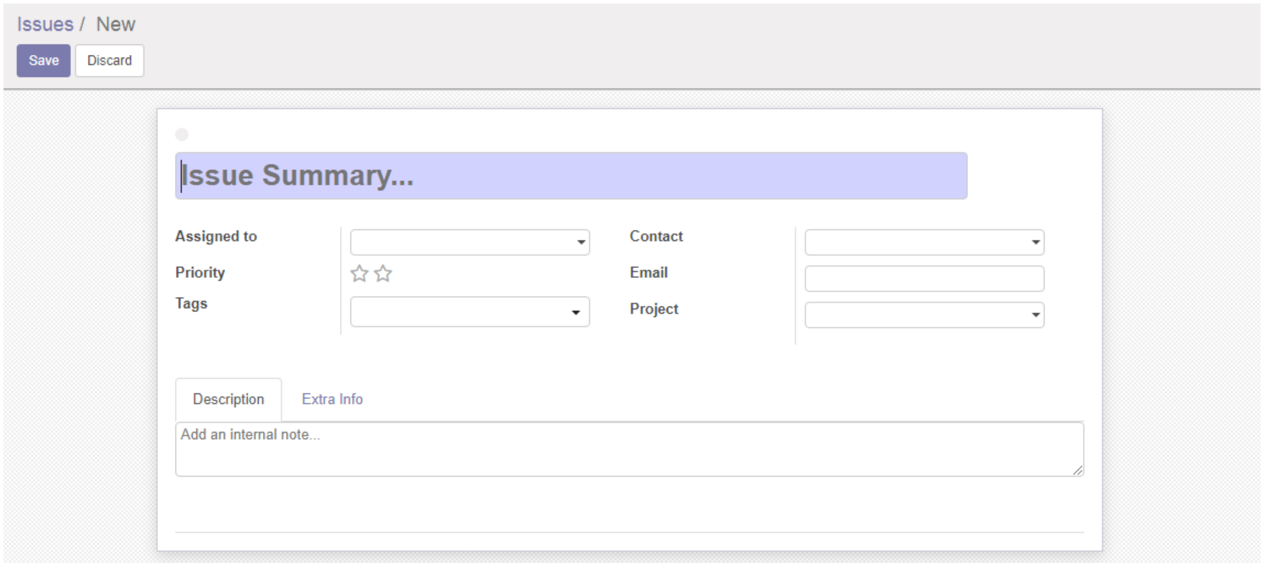
Issue Tracking

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 I*ssue 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

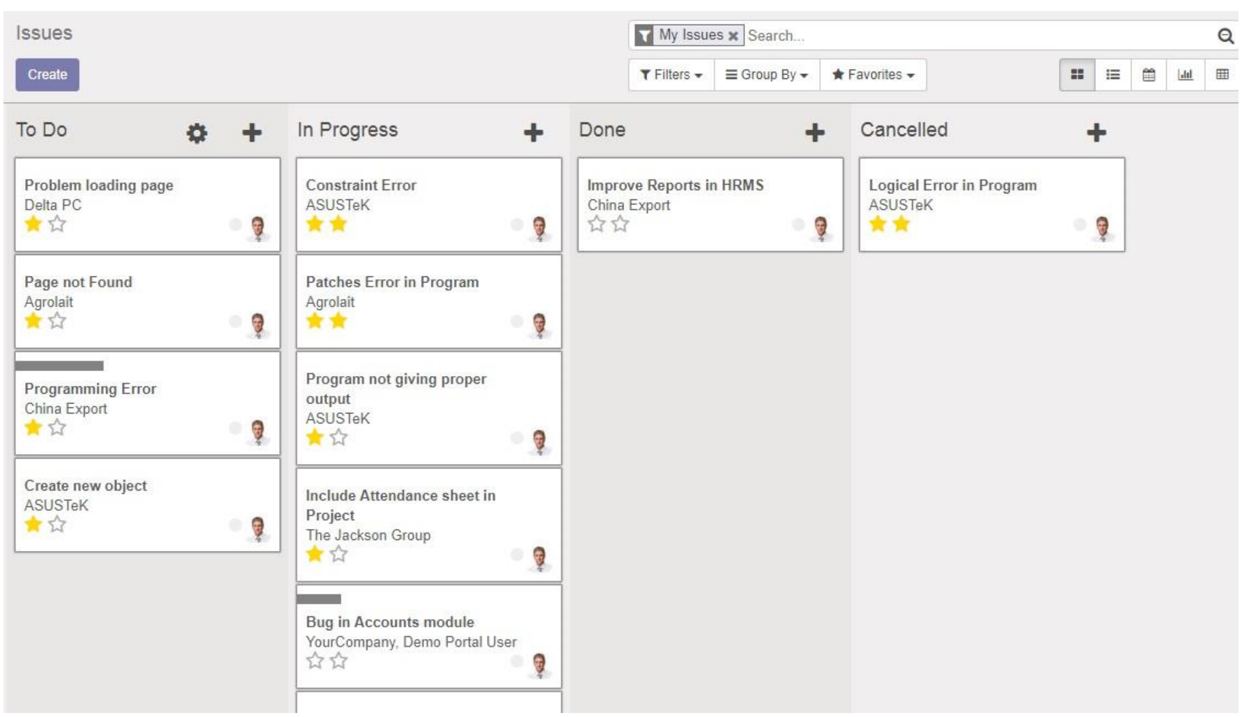
Create an Issue

- **Project >Search > Issue > Create**



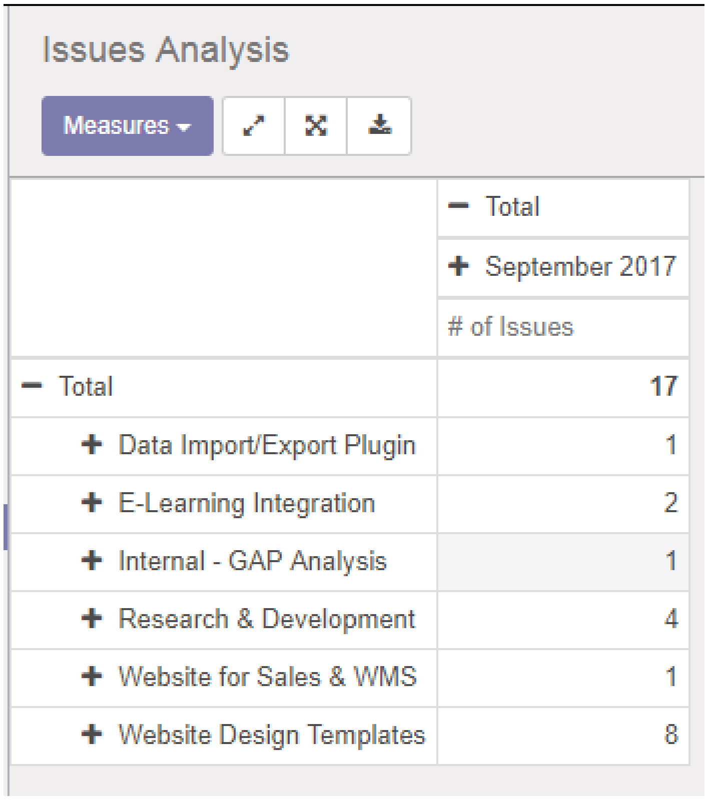
- You can assign the issue to an employee to solve
- You may also set priority
- Fill the fields and **Save**

Note:** - You can track and Update an issue progress from same menu i.e. **Project ->Search -> Issue



Report

Different Kind of Reports related to a Project as well as Issues are available under **Reports** tab.



	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

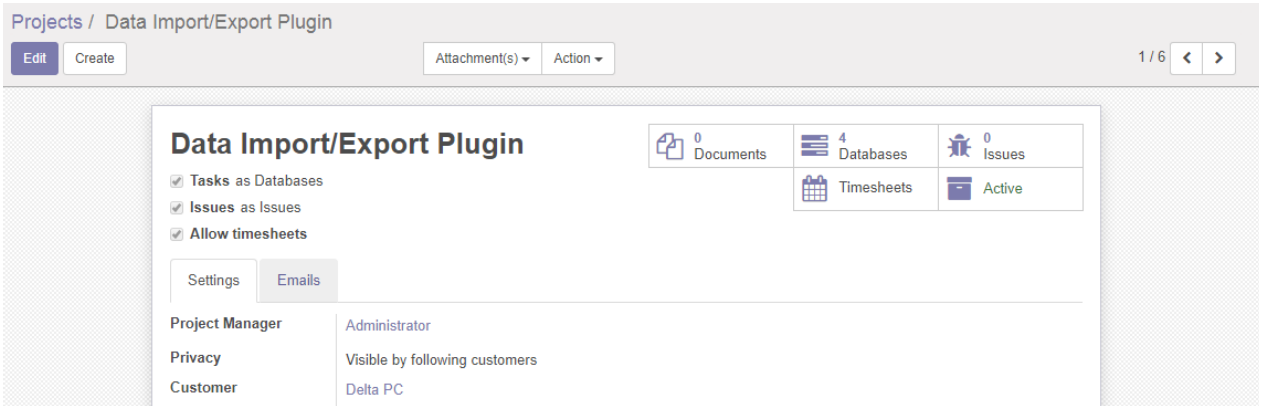
Project Customer Portal:

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:

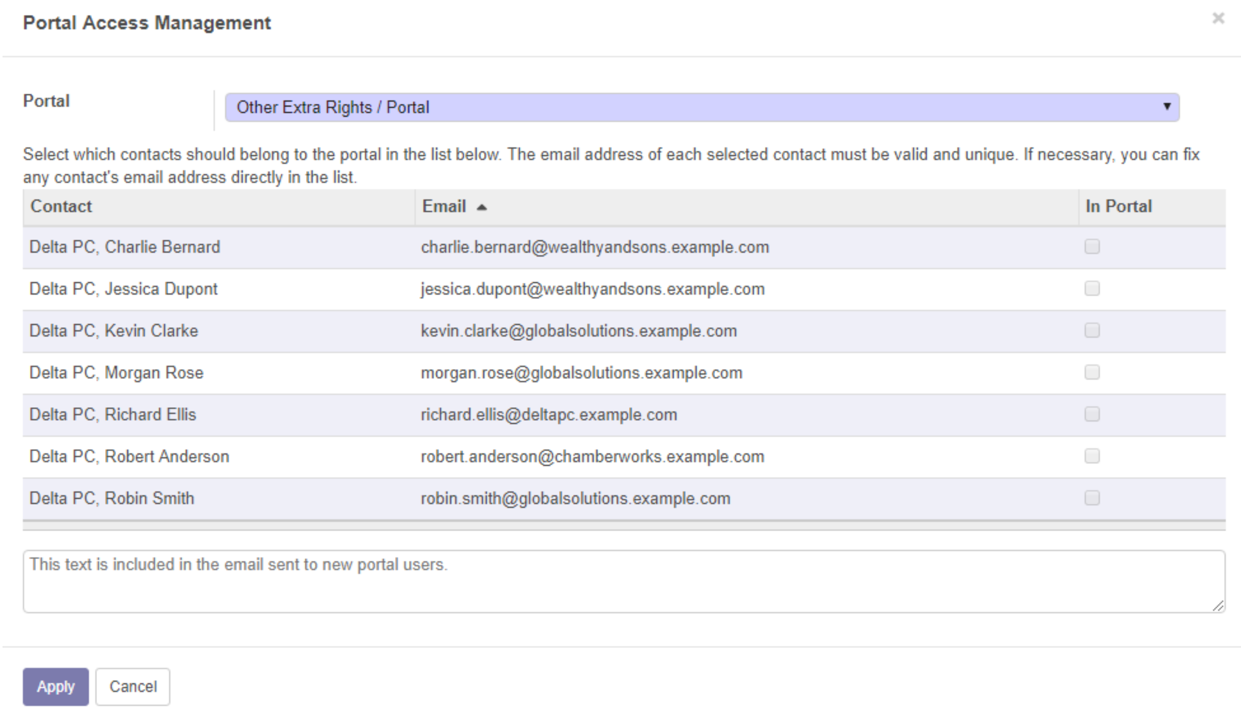
To give a customer Portal access either you can create a user with Portal access by the Following procedure.

- **Configuration > Project > Select the Project**



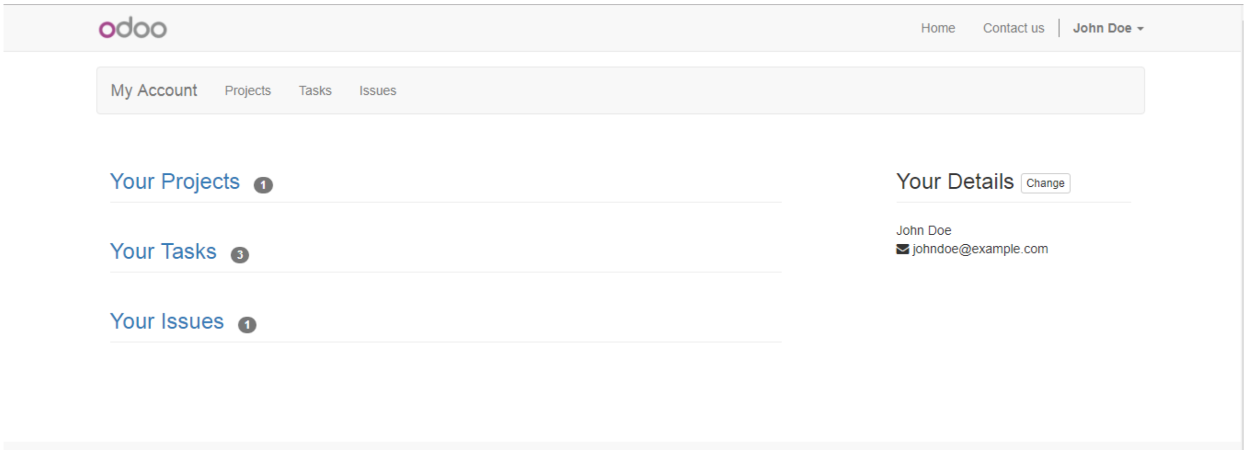
- Click on the customer

Actions > Portal Access Management

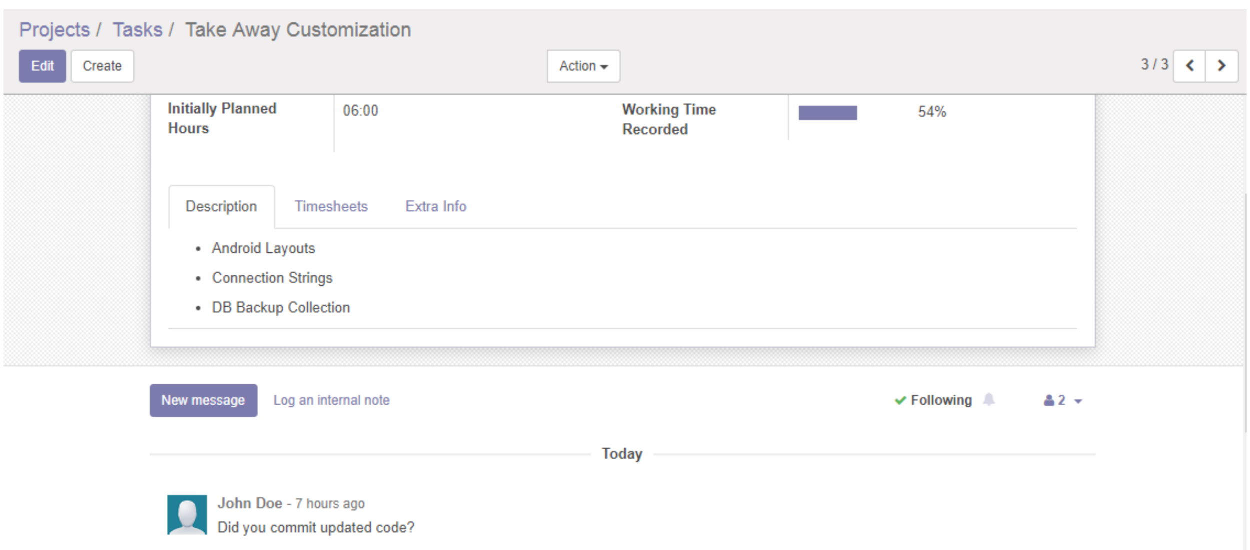


- **Click on the email** of the user (to whom we want to give access)
- Tick Portal access

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.



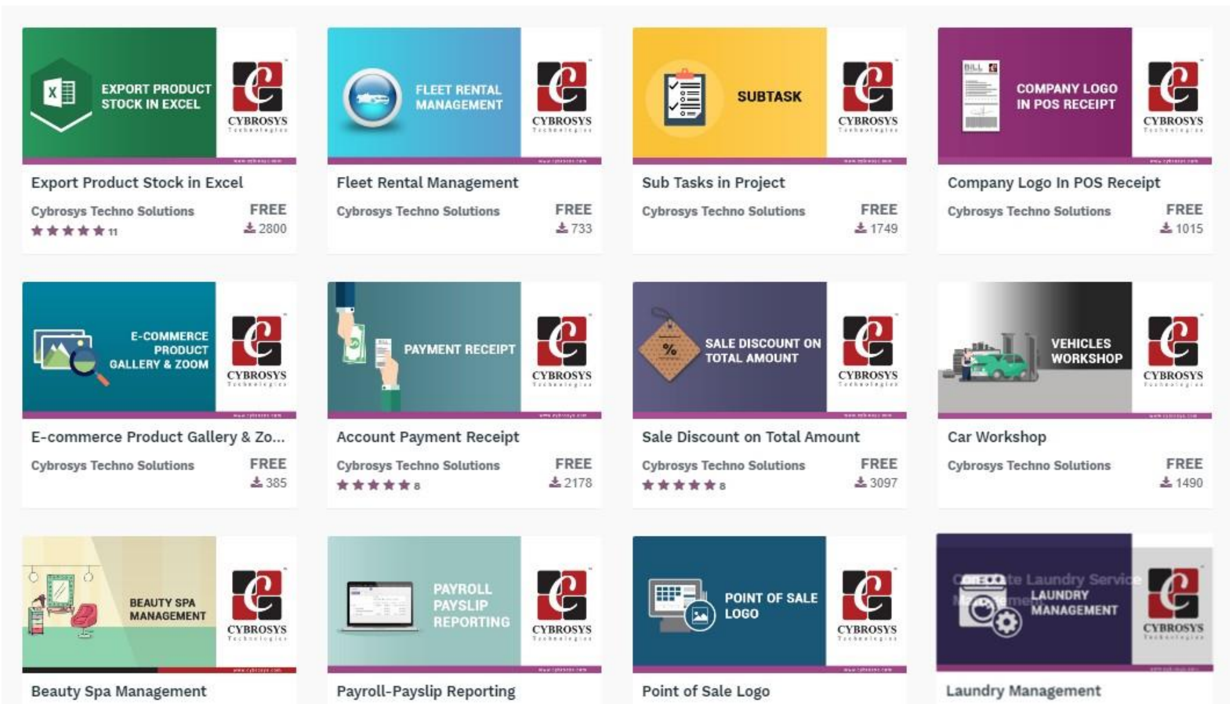
- Customer can message to project management team through his portal, and such messages will be Appended Project details



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

This Plugin helps you to export current stock report of all products to XL datasheet.

Sub Task

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

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

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

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

With this plugin you can generate and print Receipts for your customers and vendors.

Beauty Spa Management

- 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

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

Reminders helps you to attach important dates and Tasks to any of your module.

Automatic Developer Mode

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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