**MMH Odoo 9 Migration – Changes / Questions / Issues**

**Accounting**

1. The way accounts are set up in the new version of Odoo is now more in line with traditional accounting software. There are no longer “view” and “balance” accounts acting as placeholders for report headings and summary balances. I have transferred the accounts and assigned them the appropriate ‘type.’ The chart of accounts should be reviewed.
2. There is a new account ‘tag’ with three default tags. I believe these provide account groupings for reporting. Default built-ins are:
   1. Operating Activities
   2. Financing Activities
   3. Investing & Extraordinary Activities
3. Bank Statements / Reconciliation processes have been substantially changed. Recommend doing it “the new way” going forward. This has been a sore spot in the current version. Also, there is now ‘automatic’ import and reconciliation ‘every 4 hours’ from supported banks (Glacier Bank is listed.) However, this is only available with the Enterprise license.

**Users / Groups/ Access Rights**

1. There is a very complex relationship between users, groups (of users), and data/module access that is not possible to migrate “en mass.” I will manually adjust/fix during migration; however, all user accounts access rights should be reviewed prior to Go Live on Odoo 9. This should not be a major issue as there are not very many users defined in the system.

**Product Items**

1. There are a large number of non-stockable items in the database without a ‘name’ field, though they have an ‘Internal Reference’ such as ‘PKG5004.’ Where do these come from and what is there purpose?
2. There is an ‘Archive’ feature that will keep inactive items but clean them out of the day-day product listings. This might be a good way to clean up the product list.

**Inventory**