Sample-Submission App

Requirement

The goal of this project is to create a custom Odoo app called "sample-submission".This app aims to streamline the management of sample submissions, connect customers to submission forms, keep track of materials as products related to sample-submission, and generate invoices. Additionally, the app will support the generation of PDF and Excel reports with specific data and formatting requirements.

Overview

The Sample-Submission app is a custom Odoo application designed to streamline the management of sample submissions. It provides a user-friendly interface for creating, tracking, and invoicing sample submissions.

Configuration

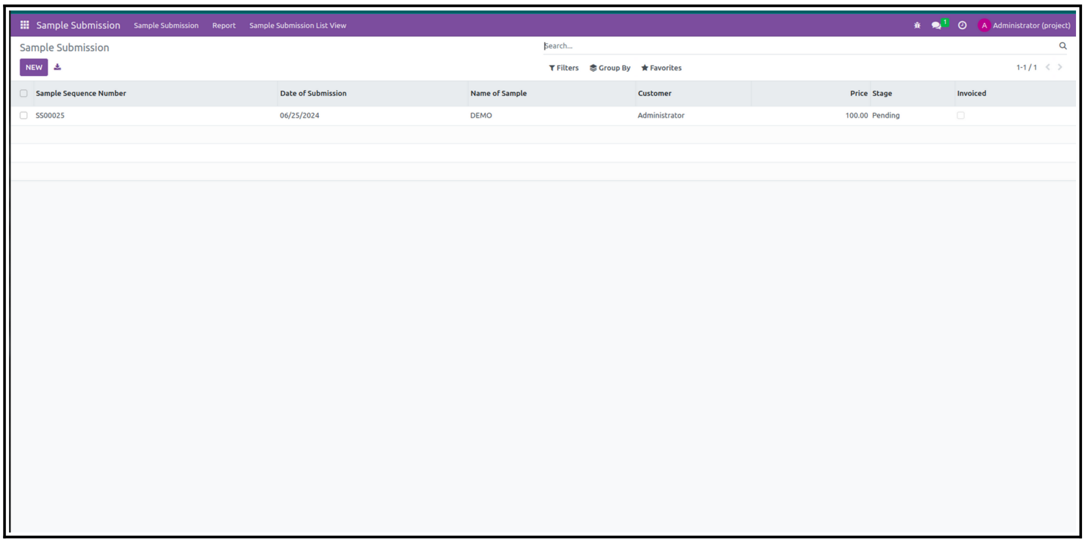
Set access privileges for the application in the general settings, including roles for Administrator, All Documents, and Own Document.

Set to “Administrator” for access main menu

Usage

Sample Submission Home List View

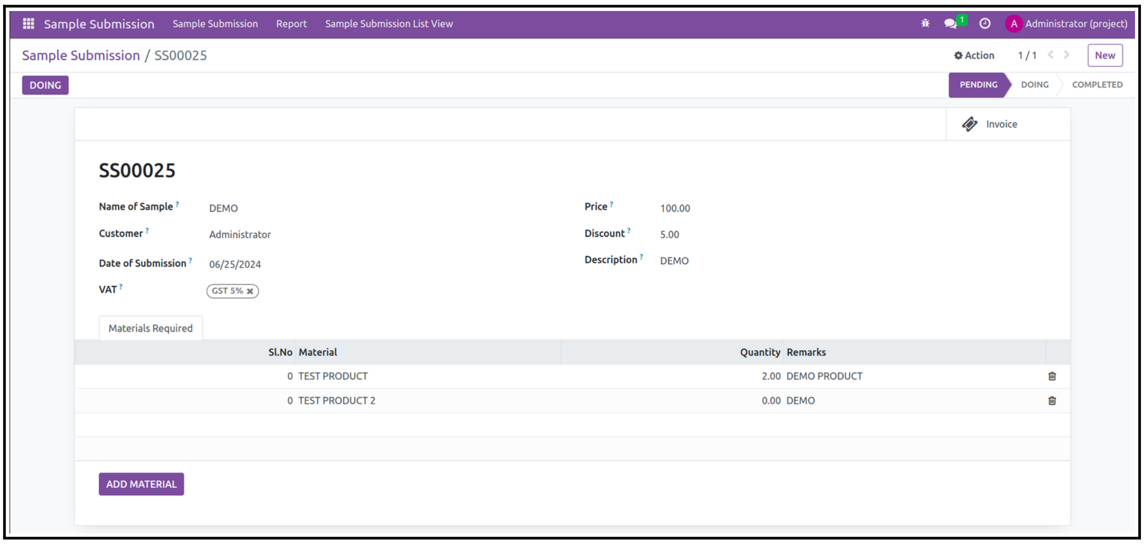
- The first screen of the Sample-Submission app is the list view of created records.



1.1 first screen of the Sample-Submission app

Record Creation Page

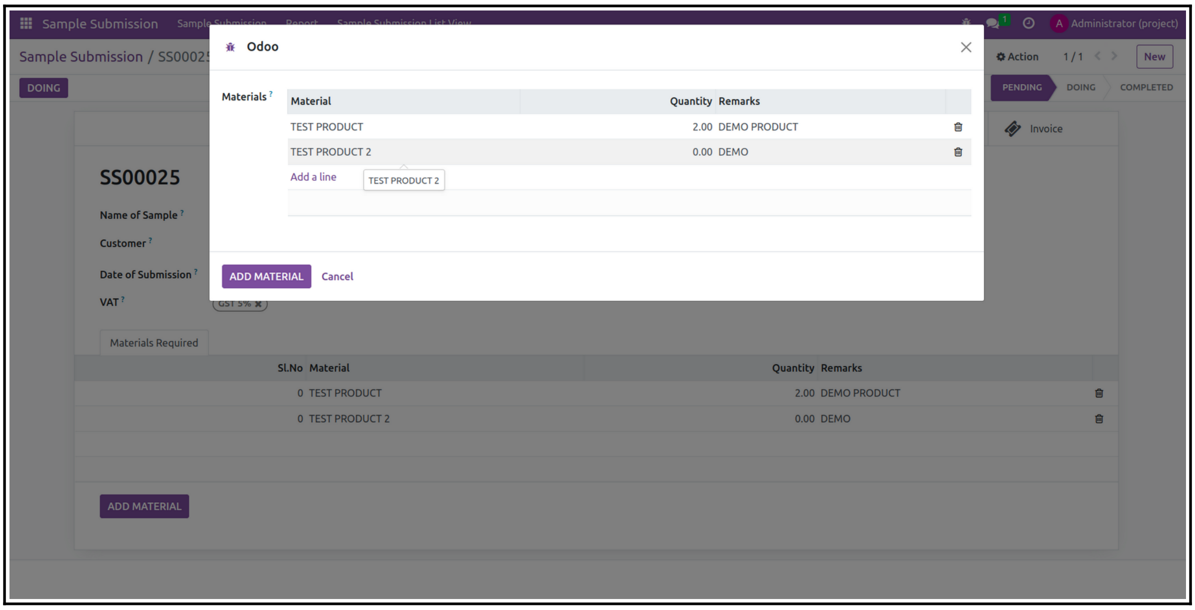
- Access the creation page via the "Create" button.
- Fields include Sample Sequence Number (auto-generated), Name of Sample, Customer (Partner), Date of Submission, Description, Price, Discount, Vat, and Stage.



1.2 Sample submit form view

Material Required Section

- Manage material requirements within each sample submission.
- Fields include Sl No, Material (Product-Inventory), Quantity, and Remarks.
- Restrict inline creation and modification of notebook record; allows inline deletion of notebook records.
- Set up a wizard to manage entry and modification of material records.
- Provided a button in below of notebook to create material-required entries with a wizard.



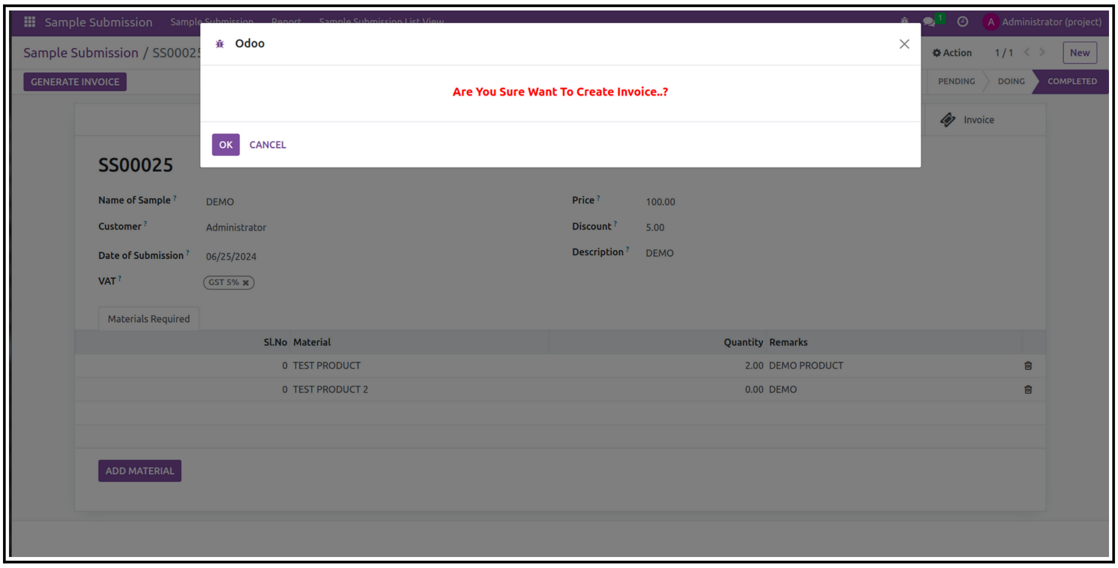
1.3 Wizard for add and modify materials

Record Stages

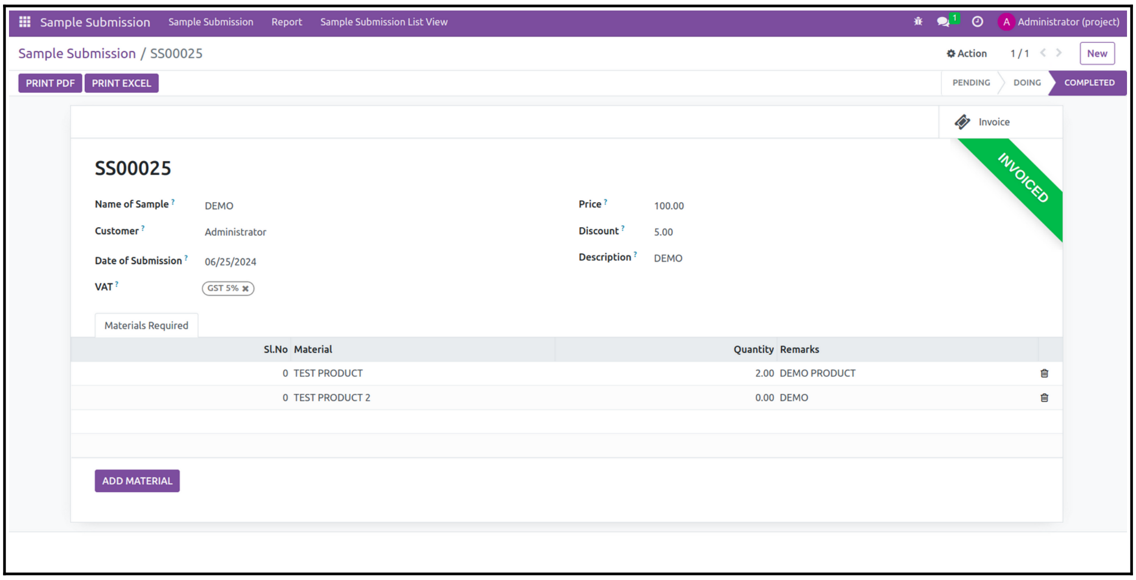
- Provided the stages, that are Doing, Pending, Completed
- Each stages are controlled by given buttons.

Generate Invoice

- Created a button for “generating invoices” of completed stage records.
- Display a warning with cancel and OK buttons to ensure the user can create or cancel the invoice when clicking the button; clicking OK should create a record under the invoicing module with sample-submission details like reference, amount, discount, and VAT.
- Indicate in the sample-submission form whether it has been invoiced or not by using a ribbon on form.



1.4 Will populate a wizard for confirmation



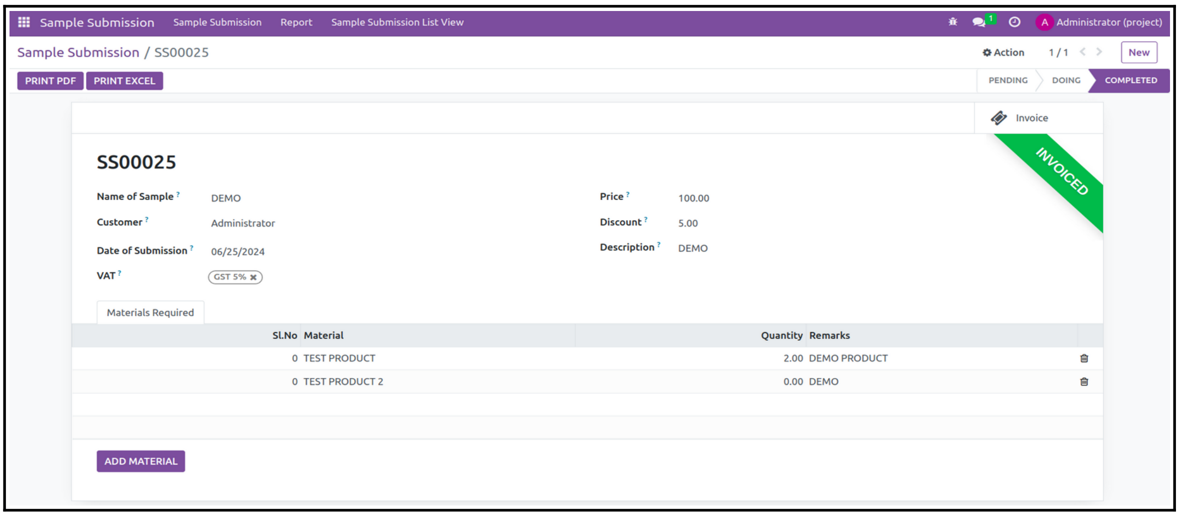
1.5 when invoice is generated for record, a ribbon is visible

The corresponding invoice will create on the account.move, we can access the invoice by using the **smart button showed on the form view.** It will only appear when invoice is generated on account.move. Also in account.move, have created a link to corresponding submission record.

Reports Generation

<u>From the Form View</u>

- **PDF Report**: “Print PDF” button is created on the header of form view of sample submission. Clicking this button will generate PDF report including Date, Customers, Name, and Price, with a specified watermark logo.
- **Excel Report:** “Print Excel” button is created on the header of form view of sample submission. Clicking this button will generate Excel report including Date, Customers, Name, and Price, with a specified watermark logo.

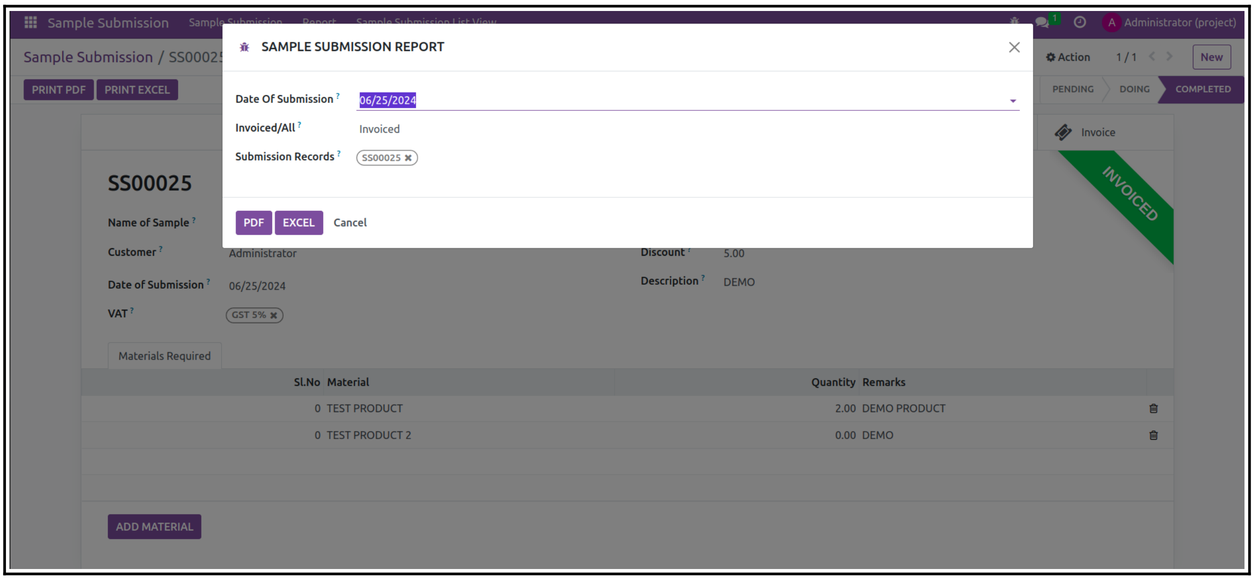


1.6 Print PDF and Print EXCEL button are placed

<u>Report through wizard</u>

- **Filter and Generate Reports**: Click the "Report" button in the navigation bar to open a filtering wizard. This allows filtering reports by date range and other criteria. The wizard has fields like date for specify the date for which records that need. A selection field is created for filtering only invoiced records or all the submission records. Onchange of date and invoice status it shows the respective records on the many2many field.

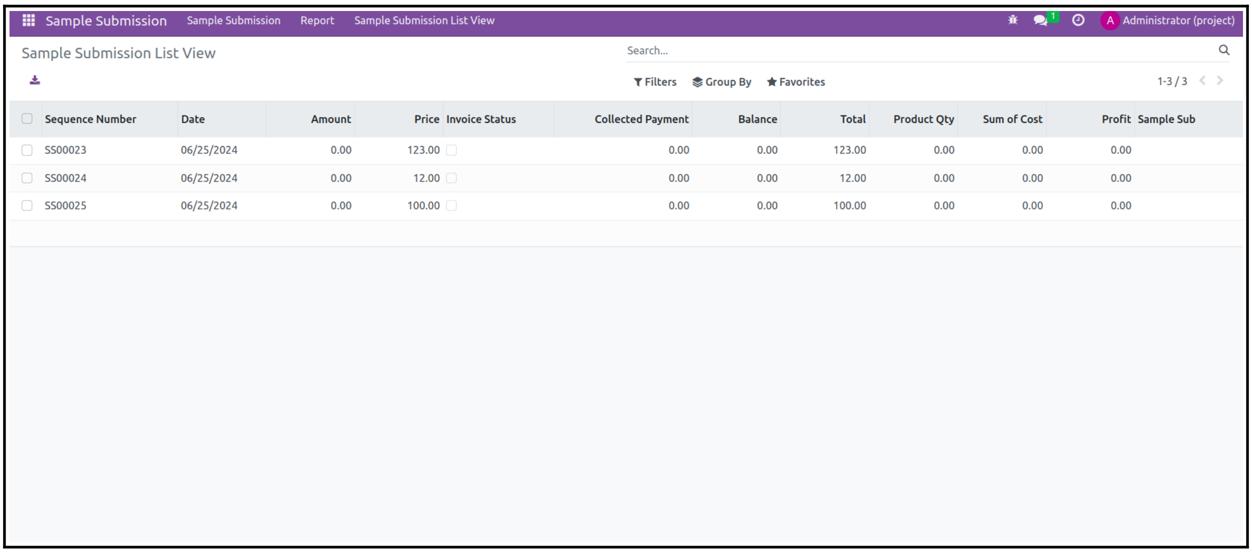
- **Export Options**: After filtering, you can export the into PDF or Excel using the respective buttons. The list report includes fields such as including Date, Customers, Name, and Price, with a specified watermark logo.



1.7 Wizard for taking filtered report

List view of submission records

This tree view is access from the menu button “Sample Submission List View” on the navigation bar, in which this is used for showing the data in a tree view. The list view includes fields such as sequence number, date, amount, price, invoice status, collected payment, balance, total product quantity (sum of all product quantities), total product cost (sum of costs), and profit (total invoiced amount minus total product cost).



1.8 Sample submission list view