**Odoo ERP Module Configuration Document**

**Project**: Odoo ERP Implementation  
**Organization**: Telco Net Organisation

**Prepared by**: IT Project Manager  
**Date**: June 2025

**1. Purpose**

This document provides a detailed configuration summary for each Odoo module implemented, including workflows, field customizations, access rights, and integration points.

**2. Configured Modules**

**2.1 Sales Management**

* **Configured Features**:
  + Quotation Templates
  + Multi-currency Sales Orders
  + Customer-specific pricing
* **Customizations**:
  + Additional fields for contract ID and SLA tracking
* **Roles & Access**:
  + Sales Executive: Create & Edit Quotes
  + Sales Manager: Approve & Validate Orders

**2.2 CRM**

* **Configured Features**:
  + Lead scoring automation
  + Stage-based pipeline views
  + Integrated email campaigns
* **Customizations**:
  + Custom tags for lead sources
  + KPI dashboard for pipeline trends

**2.3 Inventory Management**

* **Configured Features**:
  + Multi-warehouse setup
  + FIFO costing method
  + Barcode scanning
* **Customizations**:
  + Auto-replenishment triggers based on sales history

**2.4 Accounting**

* **Configured Features**:
  + Multi-company support
  + Bank reconciliation rules
  + Automatic tax computation (Kenya VAT setup)
* **Customizations**:
  + Custom chart of accounts to align with IFRS

**2.5 Procurement**

* **Configured Features**:
  + RFQ automation
  + Supplier performance metrics
* **Customizations**:
  + Vendor segmentation tags
  + Approval workflows by threshold levels

**2.6 HR & Payroll**

* **Configured Features**:
  + Biometric attendance integration
  + Payslip batches and approvals
* **Customizations**:
  + Custom allowances and deductions for local policies

**3. Integration Points**

* **MPESA API Integration**: Connected to Odoo Invoicing
* **Microsoft Power BI**: Connected to CRM and Accounting modules
* **Mailchimp**: Integrated for CRM email automation

**4. Testing & Validation**

* All modules underwent unit testing and User Acceptance Testing (UAT)
* Test scripts documented and signed off by respective module owners

**5. Documentation & Handover**

* Admin guide and user manuals prepared for each module
* Configuration backed up and version-controlled in GitHub
* Training conducted for key users (details in training plan)

**Document Owner**: ERP Functional Consultant / IT PM  
**Next Review Date**: [Insert +6 Months Post Go-Live]