

# Company Auto Configuration

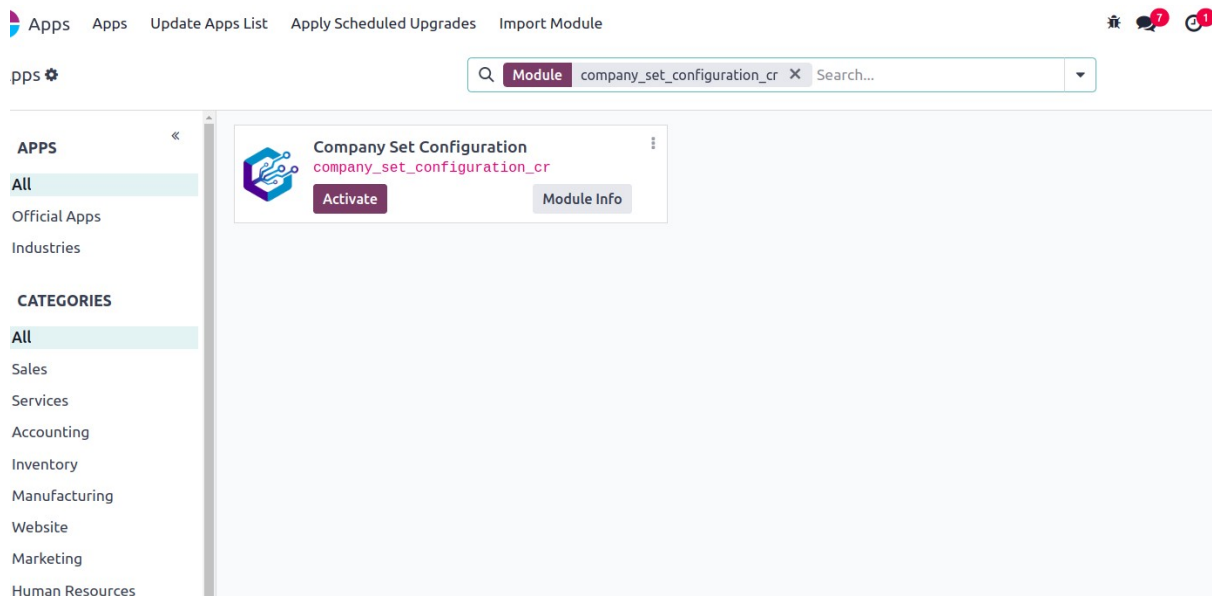
Module Name - company\_set\_configuration\_cr

Branch Name - company\_set\_configuration\_cr\_18.0

- This module automates the configuration of crucial company settings, such as warehouse, chart of accounts, analytic plan, sub-plan, and account, during the company setup process.
- By eliminating the need for manual configuration, it ensures a faster and error-free setup.

**Let's see how we can implement this feature in Odoo.**

- First, go to the Apps menu, search for the company\_set\_configuration\_cr module, and activate it.



- Navigate to Settings > Users, select the user you want to grant access to auto company configuration, and enable the Show Company Configuration option.

New Users Mitchell Admin

Groups 34

Access Rights 847

Record Rules 97

Display Serial & Lot Number in Delivery Slips	<input type="checkbox"/>	Display Serial & Lot Number on Invoices	<input type="checkbox"/>
Lock Confirmed Sales	<input type="checkbox"/>	Mail Template Editor	<input checked="" type="checkbox"/>
Manage Different Stock Owners	<input type="checkbox"/>	Manage Lots / Serial Numbers	<input checked="" type="checkbox"/>
Manage Multiple Stock Locations	<input type="checkbox"/>	Manage Multiple Units of Measure	<input type="checkbox"/>
Manage Multiple Warehouses	<input type="checkbox"/>	Manage Packages	<input type="checkbox"/>
Manage Product Packaging	<input type="checkbox"/>	Manage Product Variants	<input checked="" type="checkbox"/>
Manage Push and Pull inventory flows	<input type="checkbox"/>	Print GS1 Barcodes for Lot & Serial Numbers	<input type="checkbox"/>
Pro-forma Invoices	<input type="checkbox"/>	Purchase Receipt	<input type="checkbox"/>
Quotation Templates	<input checked="" type="checkbox"/>	Receive notifications in Odoo	<input type="checkbox"/>
Require a signature on your delivery orders	<input type="checkbox"/>	Sale Receipt	<input type="checkbox"/>
Send an automatic reminder email to confirm delivery	<input checked="" type="checkbox"/>	Show Company Configuration	<input checked="" type="checkbox"/>
Show Quantity to Count	<input checked="" type="checkbox"/>	Stock Accounting Automatic	<input type="checkbox"/>
Use Reception Report	<input type="checkbox"/>		

EXTRA RIGHTS

Contact Creation	<input checked="" type="checkbox"/>	Multi Companies	<input checked="" type="checkbox"/>
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- In the company settings, locate the **Set Configuration** button and click on it to open the configuration popup.

Settings

General Settings

Users & Companies

Translations

Technical

New Companies GP Co LTD

Set Configuration

Send message

Company Name

GP Co LTD

Your logo

General Information

Branches

Inter-Company Transactions

Contact

GP Co LTD

Phone

Address

Street...

Street 2...

City

State

ZIP

Country

Mobile

Email

Website

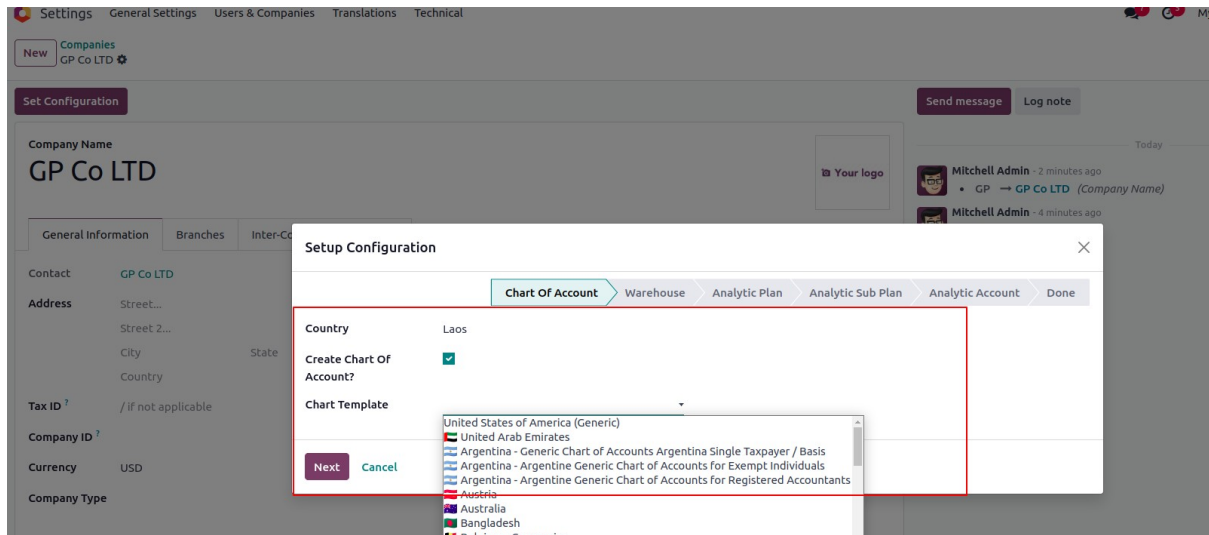
e.g. https://www.odoo.com

Parent Company

Tax ID ?

/ if not applicable

- You need to select a country, check the **Create Chart of Account** option to set the fiscal package (Chart Template) for the company, and you will see a list of available packages.



Settings General Settings Users & Companies Translations Technical

New Companies GP Co LTD

Set Configuration

Company Name GP Co LTD

General Information Branches Inter-C

Contact GP Co LTD

Address Street... Street 2... City State Country

Tax ID ? / if not applicable

Company ID ?

Currency USD

Company Type

Setup Configuration

Chart Of Account Warehouse Analytic Plan Analytic Sub Plan Analytic Account Done

Country Laos

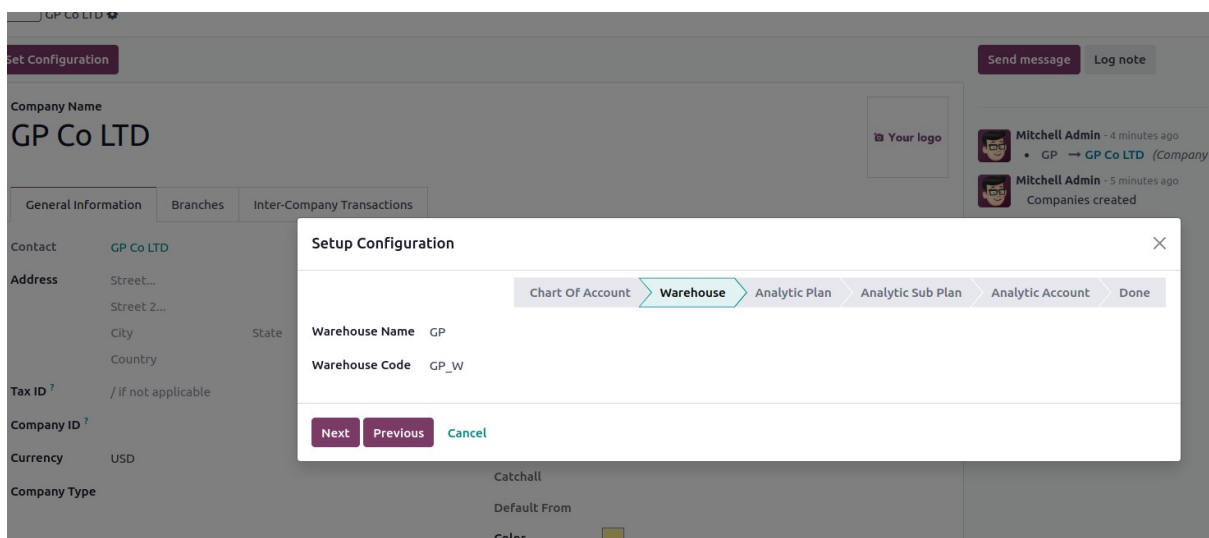
Create Chart Of Account? ☒

Chart Template

United States of America (Generic)  
United Arab Emirates  
Argentina - Generic Chart of Accounts  
Argentina - Generic Chart of Accounts for Exempt Individuals  
Argentina - Generic Chart of Accounts for Registered Accountants  
Austria  
Australia  
Bangladesh  
Belgium - Companies

Next Cancel

- Click on the **Next** button to proceed to the warehouse configuration. Here, you can provide the warehouse name and code.



GP Co LTD

Set Configuration

Company Name GP Co LTD

General Information Branches Inter-Company Transactions

Contact GP Co LTD

Address Street... Street 2... City State Country

Tax ID ? / if not applicable

Company ID ?

Currency USD

Company Type

Setup Configuration

Chart Of Account Warehouse Analytic Plan Analytic Sub Plan Analytic Account Done

Warehouse Name GP

Warehouse Code GP\_W

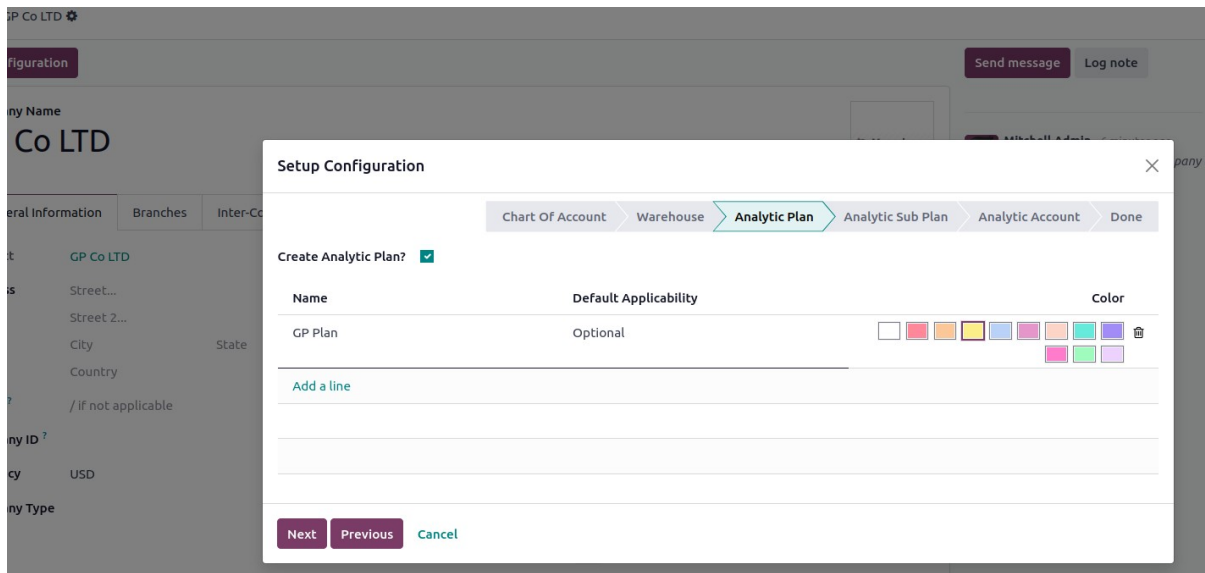
Next Previous Cancel

Catchall

Default From

Color

- Click on the **Next** button to proceed to the analytic plan step, where you can create a plan by checking the **Create Analytic Plan** checkbox.

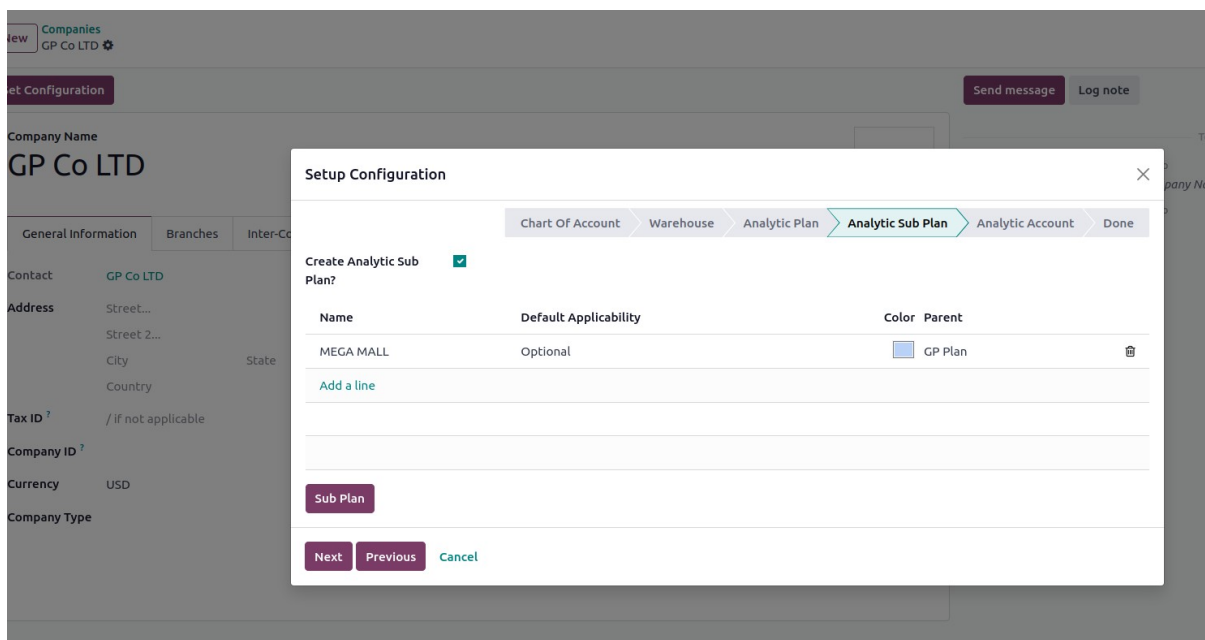


The screenshot shows the 'Setup Configuration' dialog box with the 'Analytic Plan' step selected in the breadcrumb navigation. The 'Create Analytic Plan?' checkbox is checked. Below it is a table with columns: Name, Default Applicability, and Color.

Name	Default Applicability	Color
GP Plan	Optional	[Color Selection Icons]

At the bottom of the dialog, there are buttons for 'Next', 'Previous', and 'Cancel'.

- By clicking **Next** in the sub-plan section, you can create a sub-plan for the analytic plan you created in the previous step. If you want to create sub-plans for these sub-plans, you can click on the **Sub Plan** button.



The screenshot shows the 'Setup Configuration' dialog box with the 'Analytic Sub Plan' step selected in the breadcrumb navigation. The 'Create Analytic Sub Plan?' checkbox is checked. Below it is a table with columns: Name, Default Applicability, Color, and Parent.

Name	Default Applicability	Color	Parent
MEGA MALL	Optional	[Blue Color Icon]	GP Plan

Below the table, there is a 'Sub Plan' button. At the bottom of the dialog, there are buttons for 'Next', 'Previous', and 'Cancel'.

Companies  
GP Co LTD

Setup Configuration

Company Name  
GP Co LTD

General Information Branches Inter-Company

Contact GP Co LTD

Address Street... Street 2... City State Country

Tax ID ? / if not applicable

Company ID ?

Currency USD

Company Type

Setup Configuration

Chart Of Account Warehouse Analytic Plan **Analytic Sub Plan** Analytic Account Done

Create Analytic Sub Plan? ☒

Name	Default Applicability	Color	Parent
MEGA MALL	Optional		GP Plan
<a href="#">Add a line</a>			
Name	Default Applicability	Color	Parent
MG PATUXAY	Optional		MEGA MALL
<a href="#">Add a line</a>			

[Next](#) [Previous](#) [Cancel](#)

- Click on the **Next** button to create the analytic account for the analytic plans you created in the previous steps.

Companies  
GP Co LTD

Setup Configuration

Company Name  
GP Co LTD

General Information Branches Inter-Company

Contact GP Co LTD

Address Street... Street 2... City State Country

Tax ID ? / if not applicable

Company ID ?

Currency USD

Company Type

Setup Configuration

Chart Of Account Warehouse Analytic Plan Analytic Sub Plan **Analytic Account** Done

Create Analytic Account? ☒

Name	Plan
GP Account	
<a href="#">Add a line</a>	

[Next](#) [Previous](#) [Cancel](#)

GP Plan

MEGA MALL

MG PATUXAY

[Search More...](#)

[Start typing...](#)



- Click on the **Next** button to proceed to the final step, where you can review all the records created in the previous steps. If you need to make changes to any record, you can use the **Previous** button to go back to the respective step.

Setup Configuration

Chart TemplateUnited States of America (Generic)

Warehouse NameGP

Warehouse CodeGP W

ANALYTIC PLANS

Name	Default Applicability	Color
GP Plan	Optional	<div></div>

ANALYTIC SUB PLANS

Name	Default Applicability	Color	Parent
MEGA MALL	Optional	<div></div>	GP Plan

Name	Default Applicability	Color	Parent
MG PATUXAY	Optional	<div></div>	MEGA MALL

ANALYTIC ACCOUNTS

Name	Plan
GP Account	GP Plan

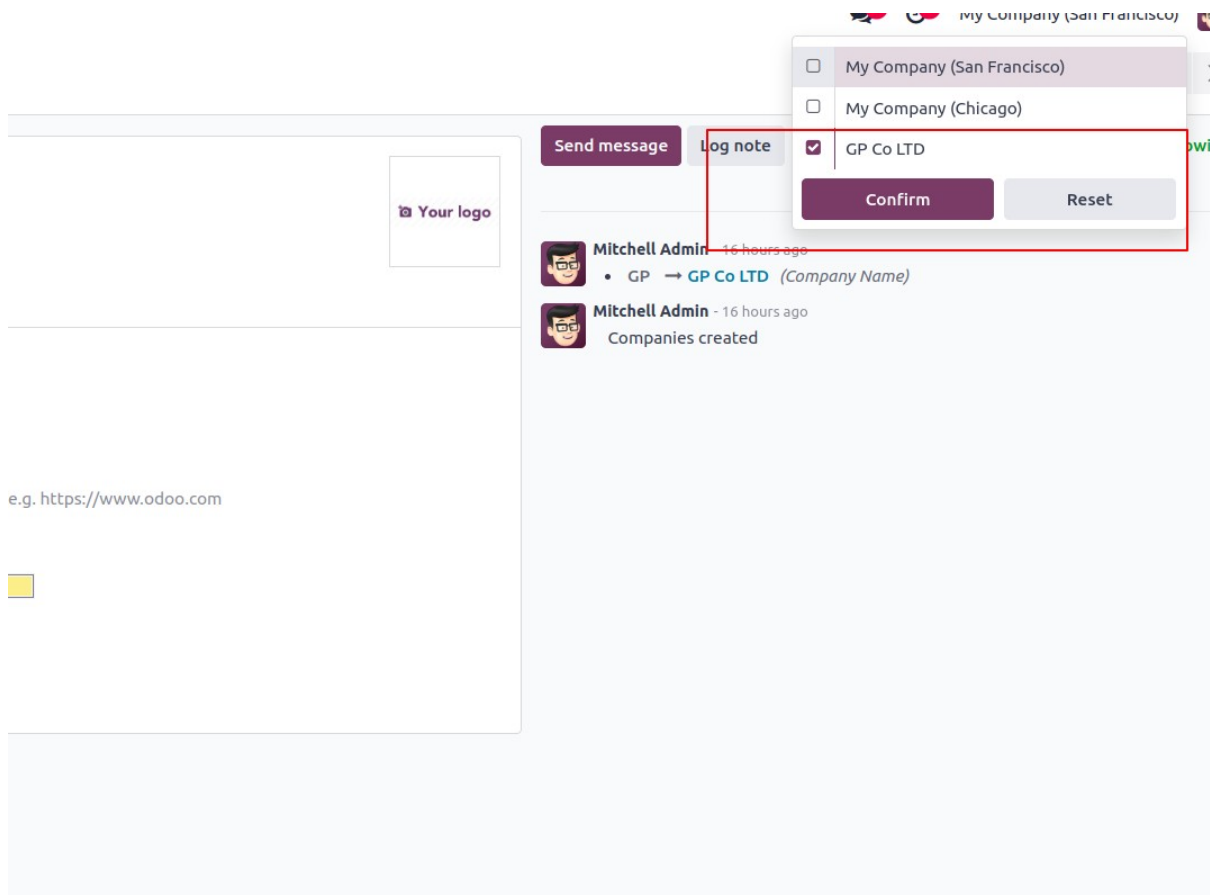
Confirm

Previous

Cancel



- When you click on **Confirm**, a confirmation popup will appear asking, "Are you sure you want to confirm?" Confirm your action to proceed.
- You need to select the company for which you have set up the configuration.



- When you go to **Accounting > Configuration > Settings**, you will find the fiscal package that you set up during the configuration.

Accounting > Configuration > Accounting > Fiscal Localization

Save Discard Settings

Q Search...

**Fiscal Localization**

Fiscal Localization ⓘ  
Taxes, fiscal positions, chart of accounts & legal statements for your country

Package United States of America (Ger

**Accounting Import**

Initial Setup  
Choose how you want to setup your CoA

→ [Review Manually](#) (end of year balances)

→ [Import](#) (for full history)

**Taxes**

Default Taxes ⓘ  
Default taxes applied when creating new products.

Tax Return Periodicity ⓘ  
How often tax returns have to be made

- You will see the **Chart of Accounts** under **Accounting > Configuration > Chart of Accounts**, which is set according to the respective fiscal package.

Accounting Dashboard Customers Vendors Accounting Reporting Configuration

New Import Chart of Accounts ⓘ

Q Active Account X Search...

1-49 / 49

All	Code	Account Name	Type	Allow Reconciliation	Account Currency	Companies
1	101000	Current Assets	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
2	101300	Account Receivable (PoS)	Receivable	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
3	101401	Bank	Bank and Cash	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
4	101402	Bank Suspense Account	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
5	101501	Cash	Bank and Cash	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
6	101701	Liquidity Transfer	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
7	110100	Stock Valuation	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
8	110200	Stock Interim (Received)	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
9	110300	Stock Interim (Delivered)	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
10	110400	Cost of Production	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
11	110500	Work in Progress	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
12	121000	Account Receivable	Receivable	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
13	121100	Products to receive	Current Assets	<input checked="" type="checkbox"/>		GP Co LTD <a href="#">View</a>
14	128000	Prepaid Expenses	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
15	131000	Tax Paid	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>
16	132000	Tax Receivable	Current Assets	<input type="checkbox"/>		GP Co LTD <a href="#">View</a>

- When you go to **Inventory > Configuration > Warehouses**, the warehouse is set, and the name is added with the **DCTP** prefix.





New Warehouses

Q Search...

1-1 / 1

Warehouse	Address	Company
GP - DCTP	GP Co LTD	GP Co LTD

- Under the company settings, you will find the **Inter Company Transactions** tab by activating **Developer Mode**, and you will see the **Inter Company Transaction** automatically set.

Company Name ?

GP Co LTD

Your logo

General Information

Branches

Inter-Company Transactions

Generate Bills and Refunds ?

Generate Sales Orders ?

Generate Purchases Orders ?

Warehouse ?

Receipt Operation Type ?

Synchronize Deliveries to your Receipts ?

Create as ?

Purchase Journal ?

Automation ?

☒

☒

☒

GP - DCTP

GP - DCTP: Receipts

☒

OdooBot

Vendor Bills

☒ Create in draft

☐ Create and validate

- When you go to **Accounting > Configuration > Analytic Plans**, you will see the newly created plan.

New

Analytic Plans

GP Plan

Subplans 1

Analytic Accounts 1

## GP Plan

Parent ?

Default Applicability ? Optional

Color ?

Company ? GP Co LTD

Applicability

Domain	Financial Accounts Prefix	Product Category	Company	Applicability
Add a line				

- When you click on **Sub Plans**, you will find the created sub-plan for the respective plan.

New

Analytic Plans / GP Plan

Analytic Plans

Q Search...

1-1 / 1

<input type="checkbox"/>	Name	Default Applicability	Color
<input type="checkbox"/>	MEGA MALL	Optional	<span style="background-color: purple; border: 1px solid black; display: inline-block; width: 15px; height: 15px;"></span>

New

Analytic Plans / GP Plan / MEGA MALL

Analytic Plans

Q Search...

1-1 / 1

<input type="checkbox"/>	Name	Default Applicability	Color
<input type="checkbox"/>	MG PATUXAY	Optional	<span style="background-color: purple; border: 1px solid black; display: inline-block; width: 15px; height: 15px;"></span>

- When you click on **Analytic Accounts**, you will see the analytic accounts.

Google Chrome / Analytic Plans / GP Plan / GP Accounts

Search...

1-1 / 1

Name	Reference	Customer	Plan	Company	Debit	Credit	Balance
GP Account			GP Plan	GP Co LTD	0.00 ₹	0.00 ₹	0.00 ₹
					0.00 ₹	0.00 ₹	0.00 ₹

- As per the parent company, you can also set the configuration for company branches.

New / GP Co LTD / Branches

Spec Rental

Set Configuration

Send message Log not

Company Name ? Spec Rental

Your logo

General Information Branches Inter-Company Transactions

Contact ? Spec Rental

Address ? Street... Street 2... City State ZIP United States

Tax ID ? / if not applicable

Company ID ?

Currency ? LAK

Company Type ?

Phone ?

Mobile ?

Email ?

Website ? e.g. https://www.odoo.com

Parent Company ? GP Co LTD

Email Domain ?

Bounce ?

Catchall ?

Default From ?

Color ?

Mitchell Admin - now Companies created

Inter-Company Transactions

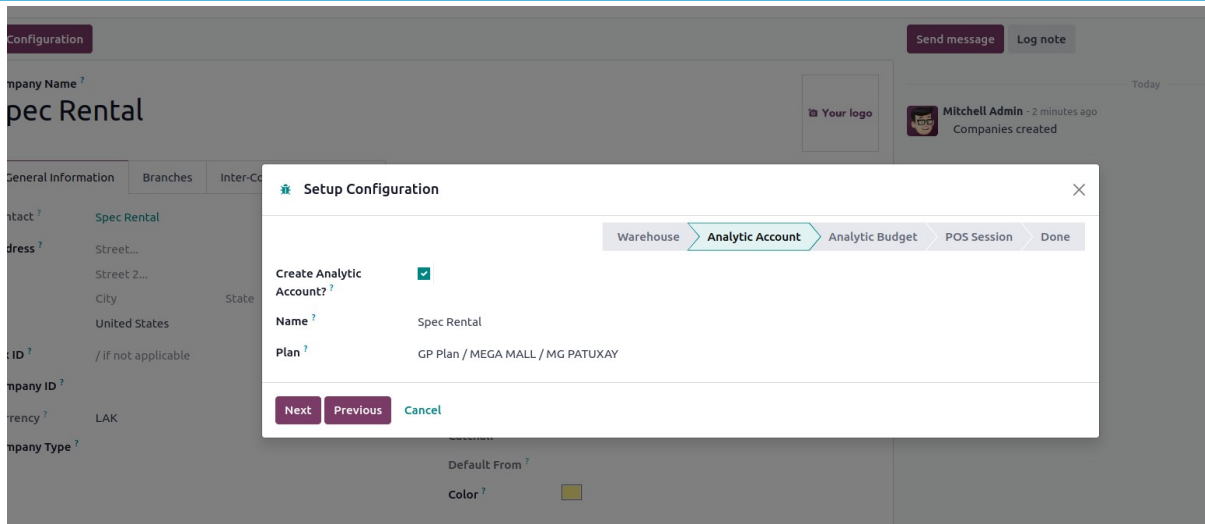
Setup Configuration

Warehouse Analytic Account Analytic Budget POS Session Done

Warehouse Name ? Spec Rental

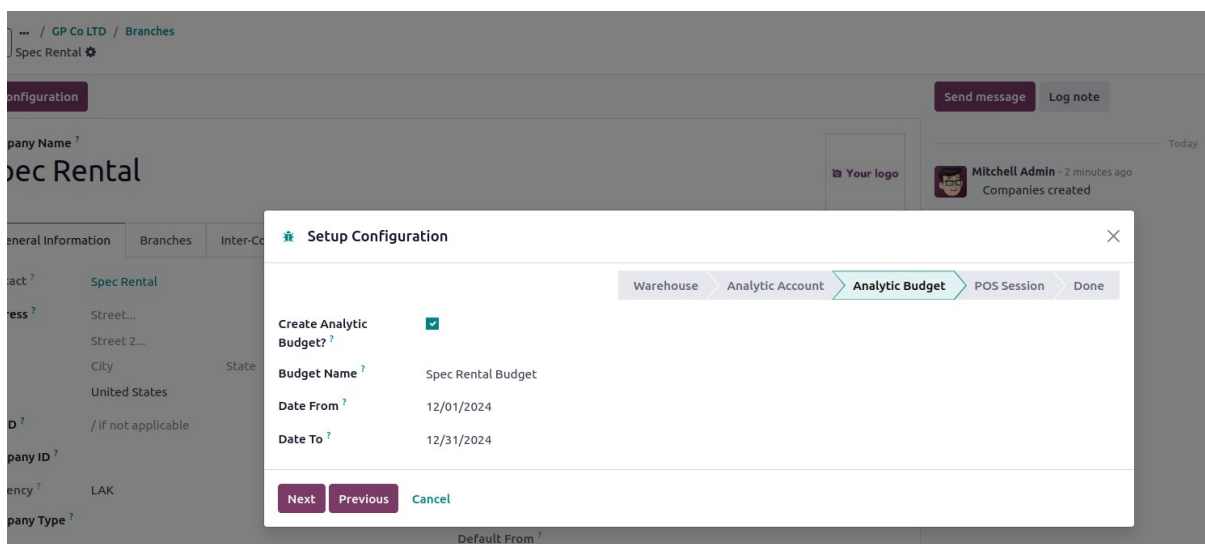
Warehouse Code ? SPEC

Next Cancel



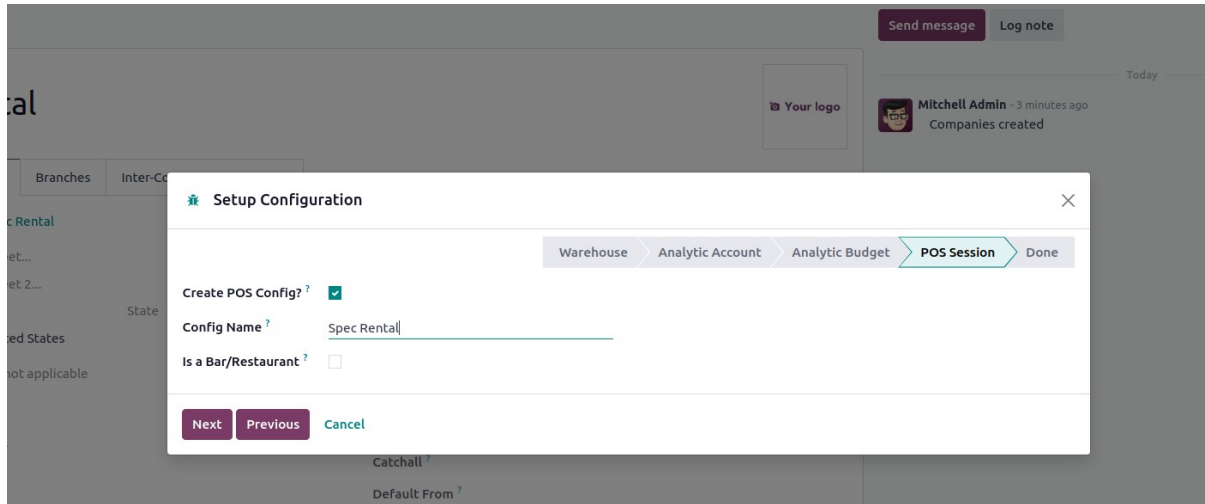
The screenshot shows the 'Setup Configuration' dialog box with the 'Analytic Account' step selected. The background shows the 'Spec Rental' company configuration page. The dialog box has a progress bar with steps: Warehouse, Analytic Account (selected), Analytic Budget, POS Session, and Done. The 'Create Analytic Account?' checkbox is checked. The 'Name' field is 'Spec Rental' and the 'Plan' field is 'GP Plan / MEGA MALL / MG PATUXAY'. At the bottom are 'Next', 'Previous', and 'Cancel' buttons.

- You can create an **Analytic Budget** by providing a name and specifying the date periods.



The screenshot shows the 'Setup Configuration' dialog box with the 'Analytic Budget' step selected. The background shows the 'Spec Rental' company configuration page. The dialog box has a progress bar with steps: Warehouse, Analytic Account, Analytic Budget (selected), POS Session, and Done. The 'Create Analytic Budget?' checkbox is checked. The 'Budget Name' field is 'Spec Rental Budget', the 'Date From' field is '12/01/2024', and the 'Date To' field is '12/31/2024'. At the bottom are 'Next', 'Previous', and 'Cancel' buttons.

- Here, you can configure the **POS Shop**. You can provide a shop name, and if it is a bar or restaurant, you can enable the respective option.



**Setup Configuration**

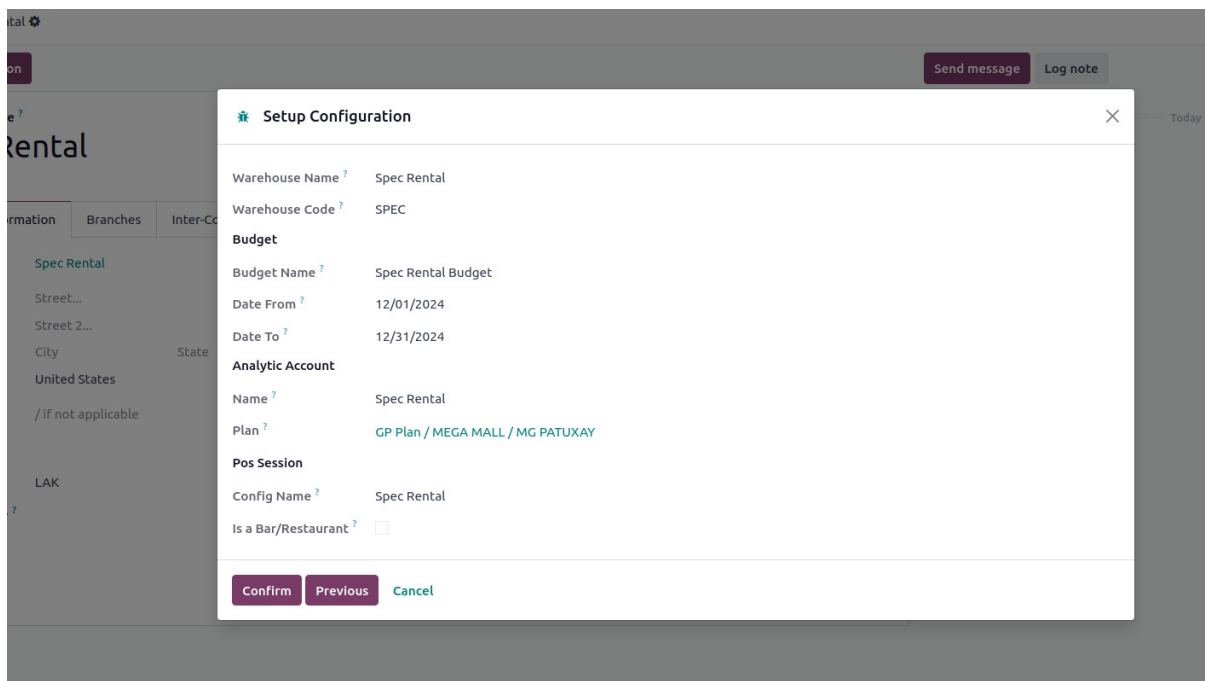
Warehouse > Analytic Account > Analytic Budget > **POS Session** > Done

Create POS Config? ☒

Config Name? Spec Rental

Is a Bar/Restaurant? ☐

Next Previous Cancel



**Setup Configuration**

Warehouse Name? Spec Rental

Warehouse Code? SPEC

**Budget**

Budget Name? Spec Rental Budget

Date From? 12/01/2024

Date To? 12/31/2024

**Analytic Account**

Name? Spec Rental

Plan? GP Plan / MEGA MALL / MG PATUXAY

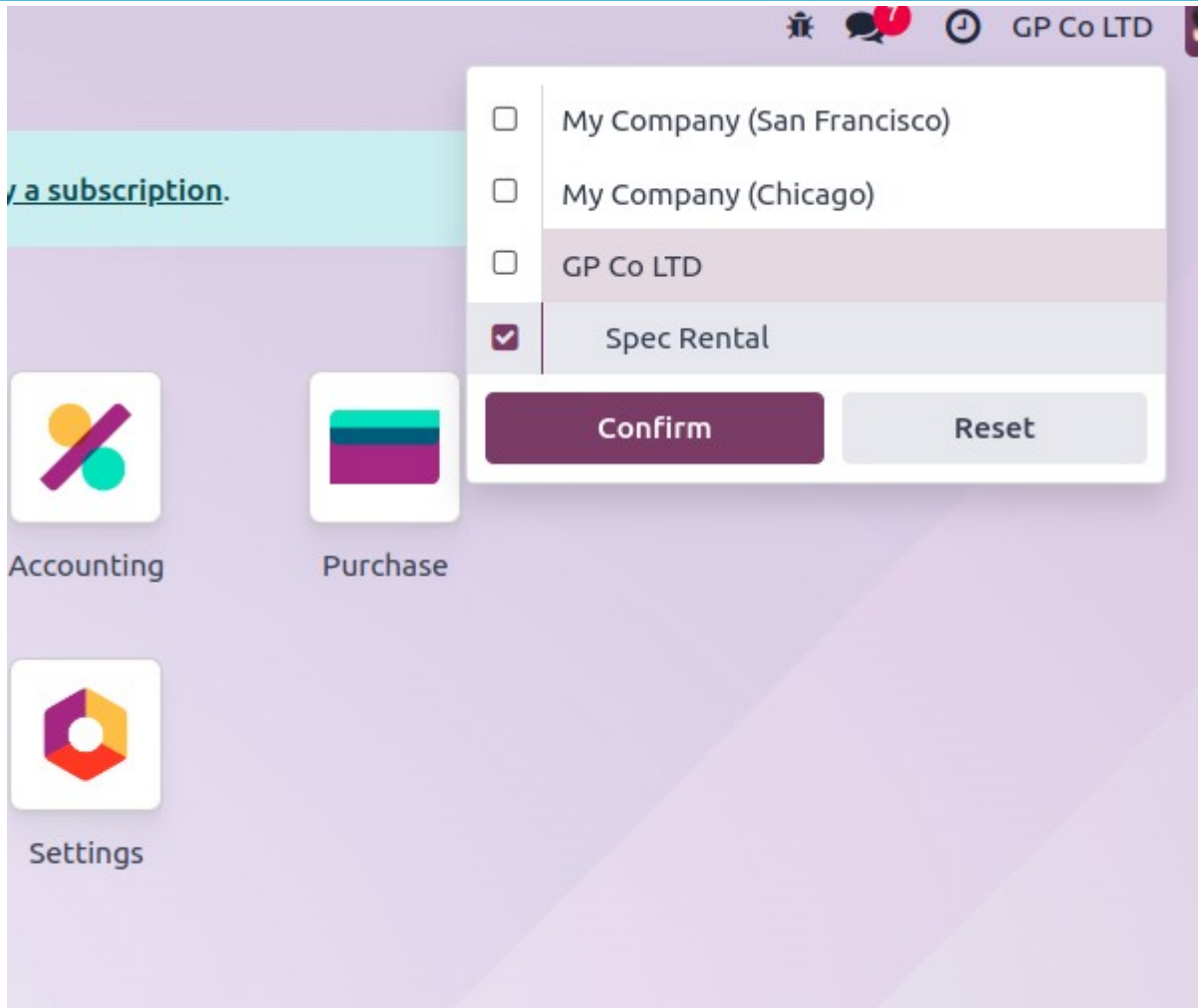
**Pos Session**

Config Name? Spec Rental

Is a Bar/Restaurant? ☐

Confirm Previous Cancel

- You need to select the branch for which you have set the configuration.



New Warehouses ✱			Q Search...	▼
<input type="checkbox"/>	Warehouse	Address	Company	
<input type="checkbox"/>	Spec Rental	Spec Rental	Spec Rent:	

- You can find the created analytic accounts by navigating to **Accounting > Configuration > Analytic Accounts**.

New

Analytic Accounts

Spec Rental ⚙️

\$

Gross Margin

0.00 K

Analytic Account ?

Spec Rental

Customer ?

Plan ?

GP Plan / MEGA MALL / MG PATUXAY

Reference ?

Company ?

Spec Rental

Currency ?

LAK

Budgets

Budget A...	Project	Departm...	Internal	GP Plan	Company	Start Date	End Date	Budgeted	Committed	Achiev

- You can find the created analytic budgets by navigating to **Accounting > Accounting > Analytic Budgets**.

New

Budgets

Spec Rental Budget ⚙️

Open

Cancel Budget

Draft

Open

Done

Budget Name ?

Spec Rental Budget

Responsible ?

Mitchell Admin

Period ?

12/01/2024

→ 12/31/2024

Budget Type ?

Expense

Company ?

Spec Rental

Budget Lines

Project	Departments	Internal	GP Plan	Budgeted
Add a line				





- You can find the newly created POS shop by navigating to **Point of Sale > Configuration > Point of Sales.**

Point of Sale

Search...

Spec Rental

Open Register

Company Name ?

Spec Rental

Your logo

General Information

Branches

Inter-Company Transactions

Generate Bills and Refunds ?



Generate Sales Orders ?



Generate Purchases Orders ?



Warehouse ?

Spec Rental

Receipt Operation Type ?

Spec Rental: Receipts

Synchronize Deliveries to  
your Receipts ?



Create as ?

OdooBot

Purchase Journal ?

Vendor Bills

Automation ?

☒ Create in draft

☐ Create and validate

