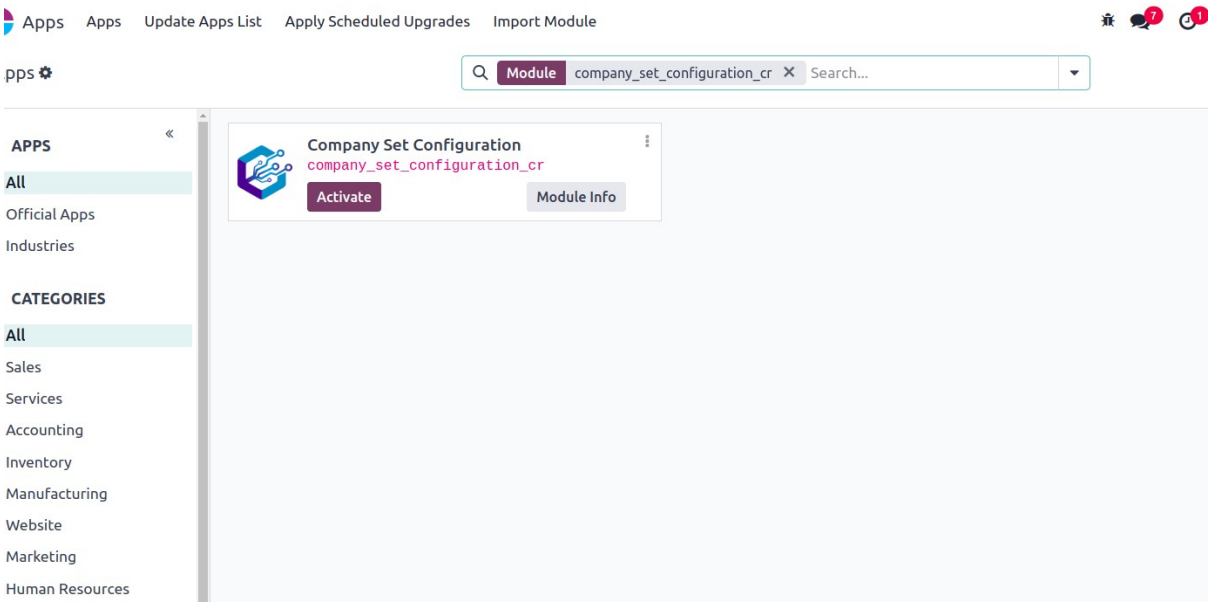
Company Auto Configuration

Module Name - company_set_configuration_cr
Branch Name - company_set_configuration_cr_18.0

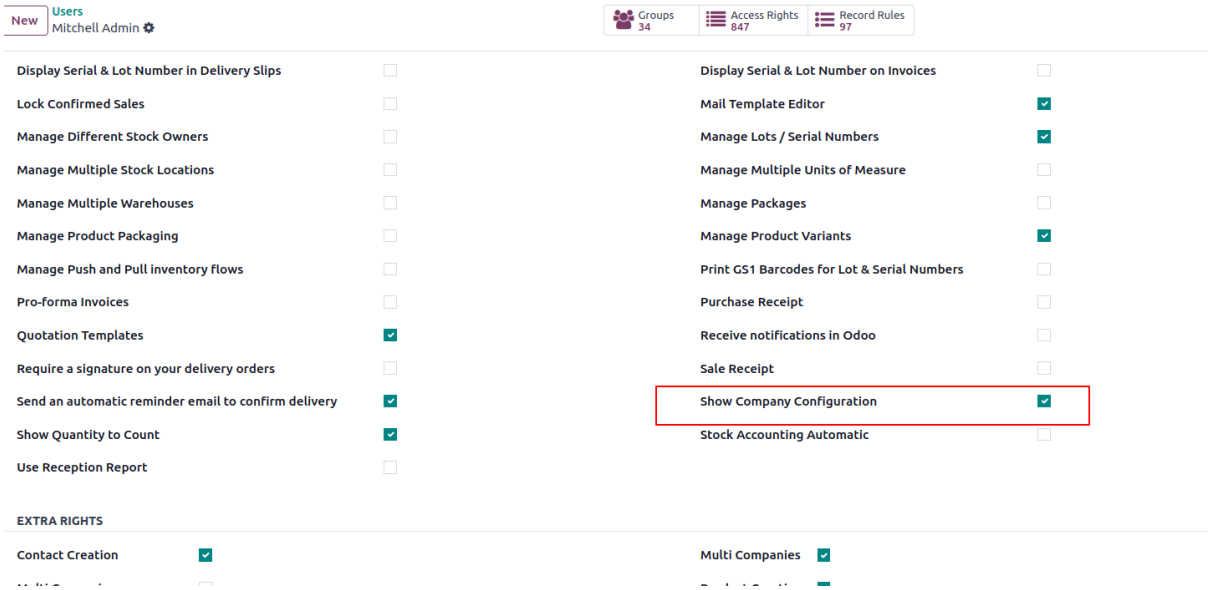
- This module automates the configuration of crucial company settings, such as warehouse, chart of accounts, analytic plan, sub-plan, and account, during the company setup process.
- By eliminating the need for manual configuration, it ensures a faster and error-free setup.

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

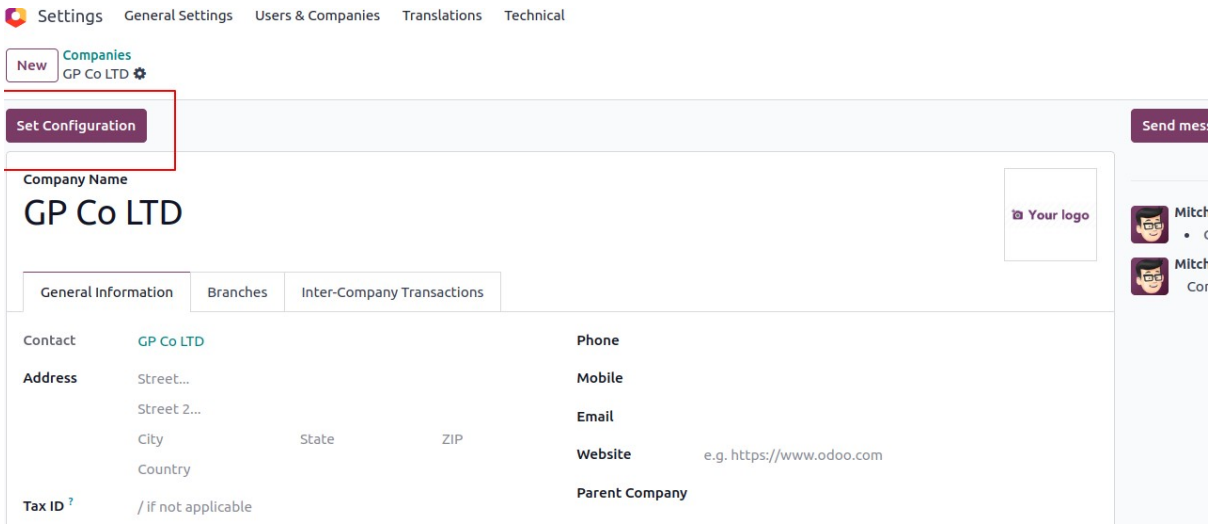
- First, go to the Apps menu, search for the company_set_configuration_cr module, and activate it.



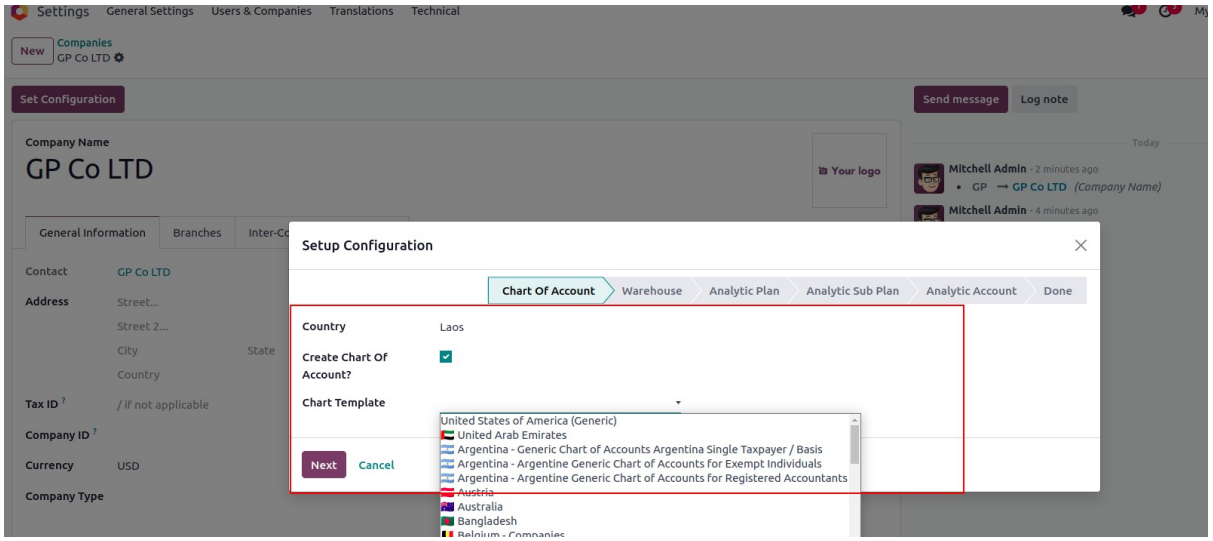
- Navigate to Settings > Users, select the user you want to grant access to auto company configuration, and enable the Show Company Configuration option.



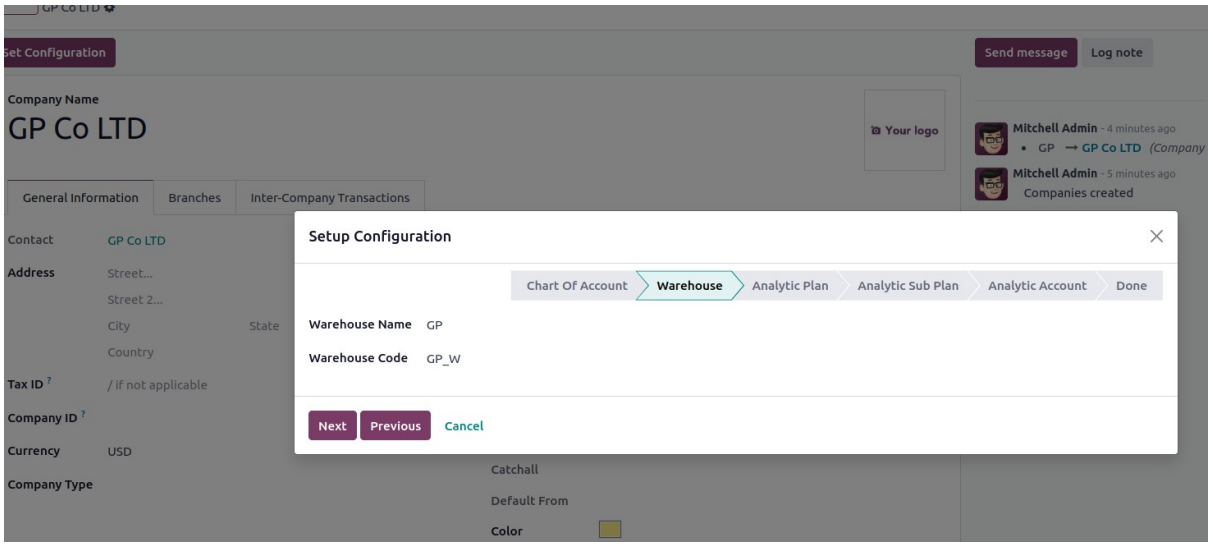
- In the company settings, locate the **Set Configuration** button and click on it to open the configuration popup.



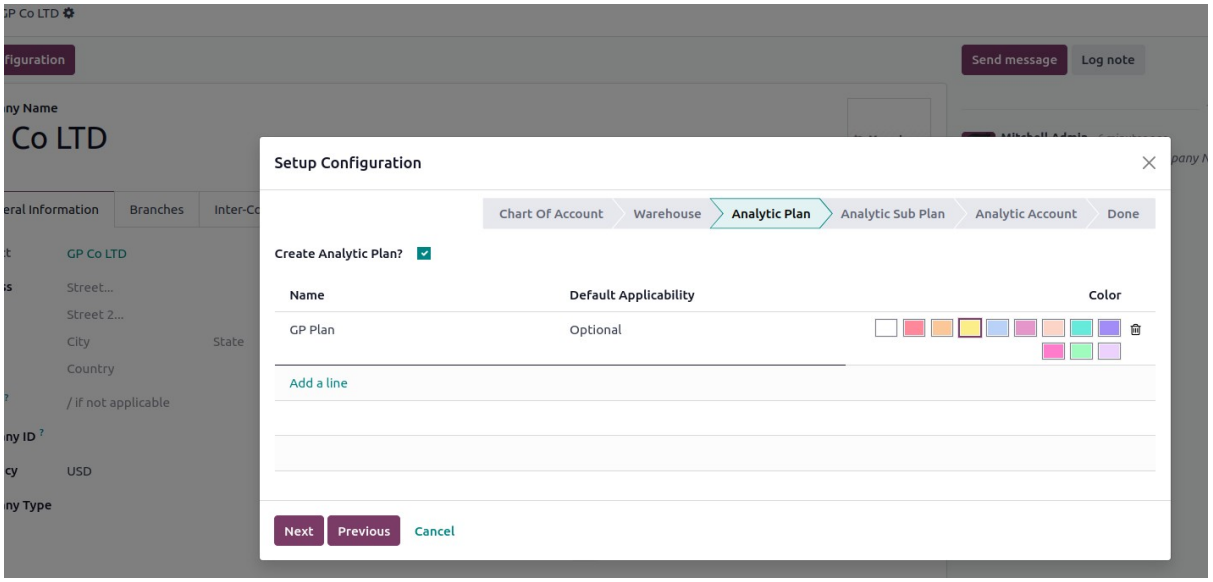
- You need to select a country, check the **Create Chart of Account** option to set the fiscal package (Chart Template) for the company, and you will see a list of available packages.



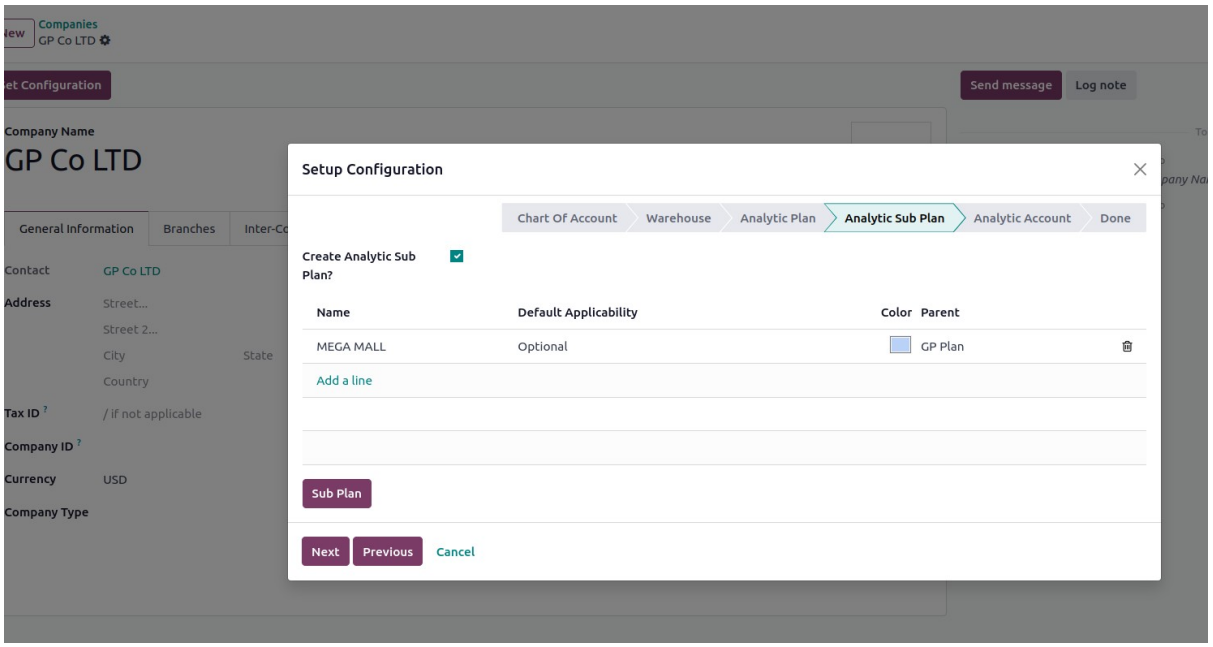
- Click on the **Next** button to proceed to the warehouse configuration. Here, you can provide the warehouse name and code.

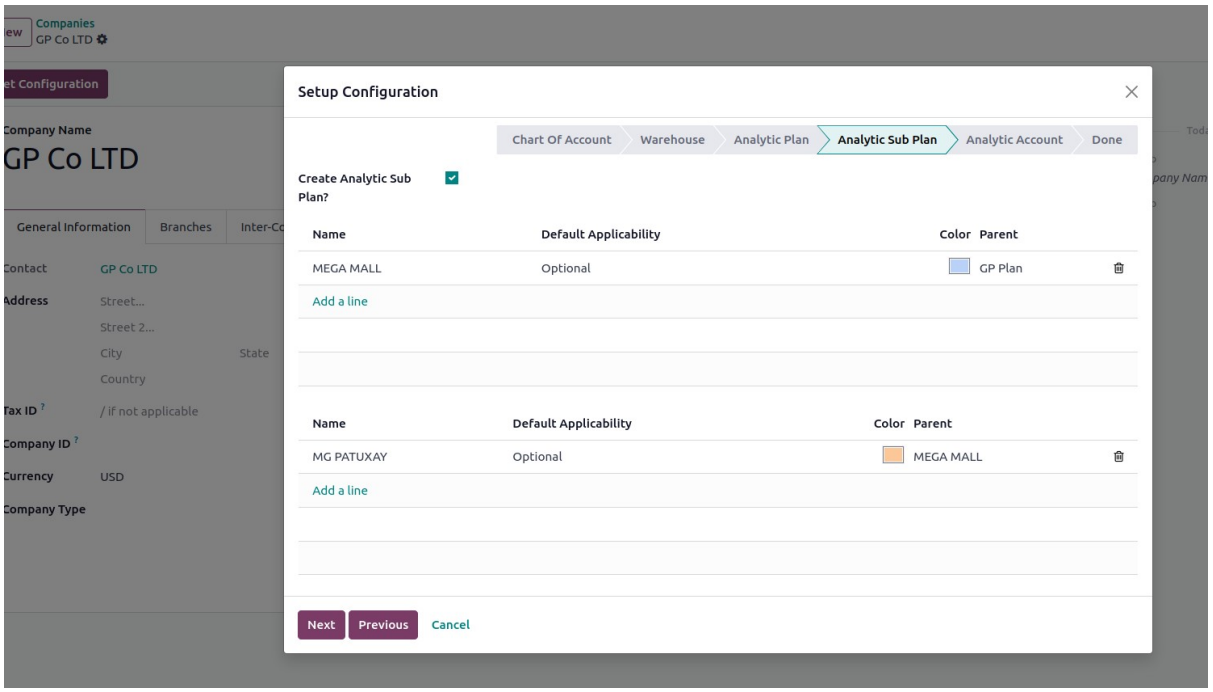


- Click on the **Next** button to proceed to the analytic plan step, where you can create a plan by checking the **Create Analytic Plan** checkbox.

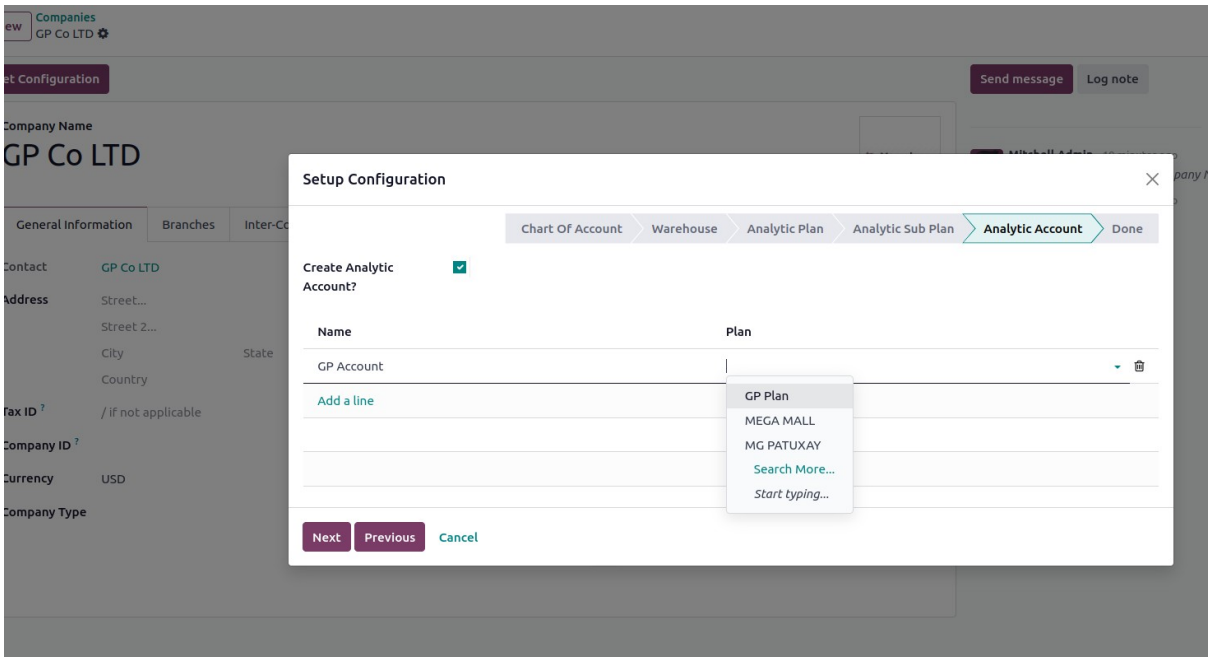


- By clicking **Next** in the sub-plan section, you can create a sub-plan for the analytic plan you created in the previous step. If you want to create sub-plans for these sub-plans, you can click on the **Sub Plan** button.

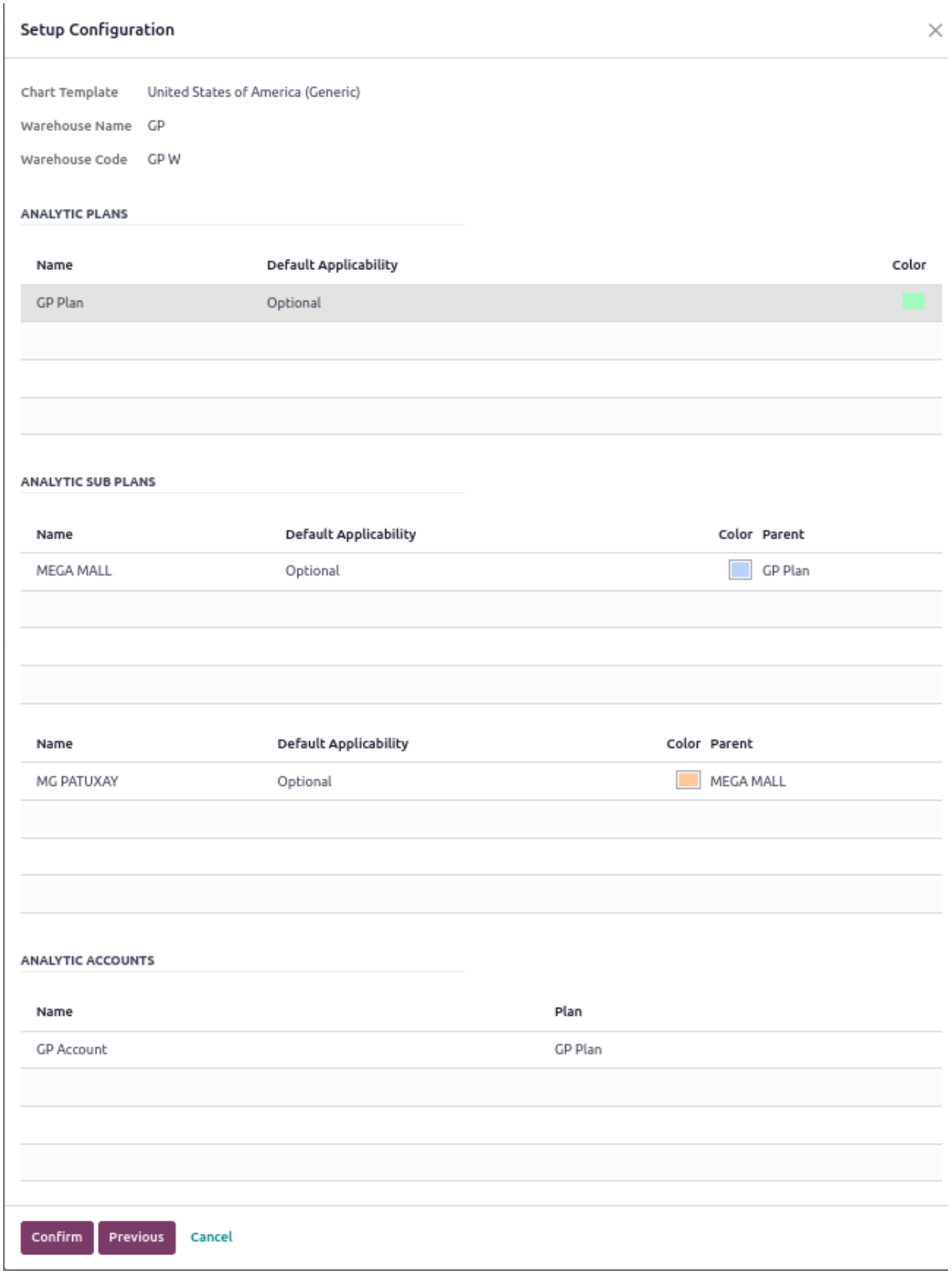




- Click on the **Next** button to create the analytic account for the analytic plans you created in the previous steps.

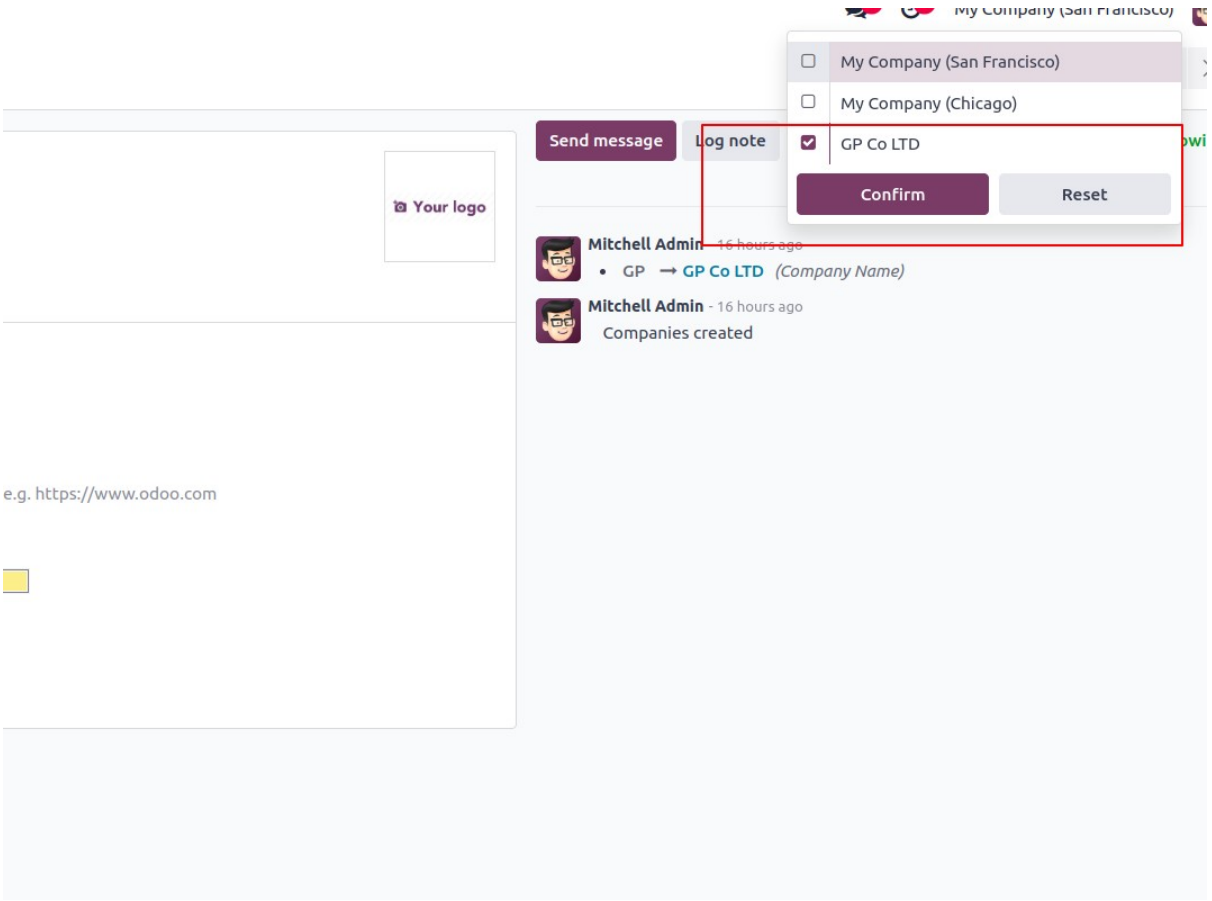


- Click on the **Next** button to proceed to the final step, where you can review all the records created in the previous steps. If you need to make changes to any record, you can use the **Previous** button to go back to the respective step.

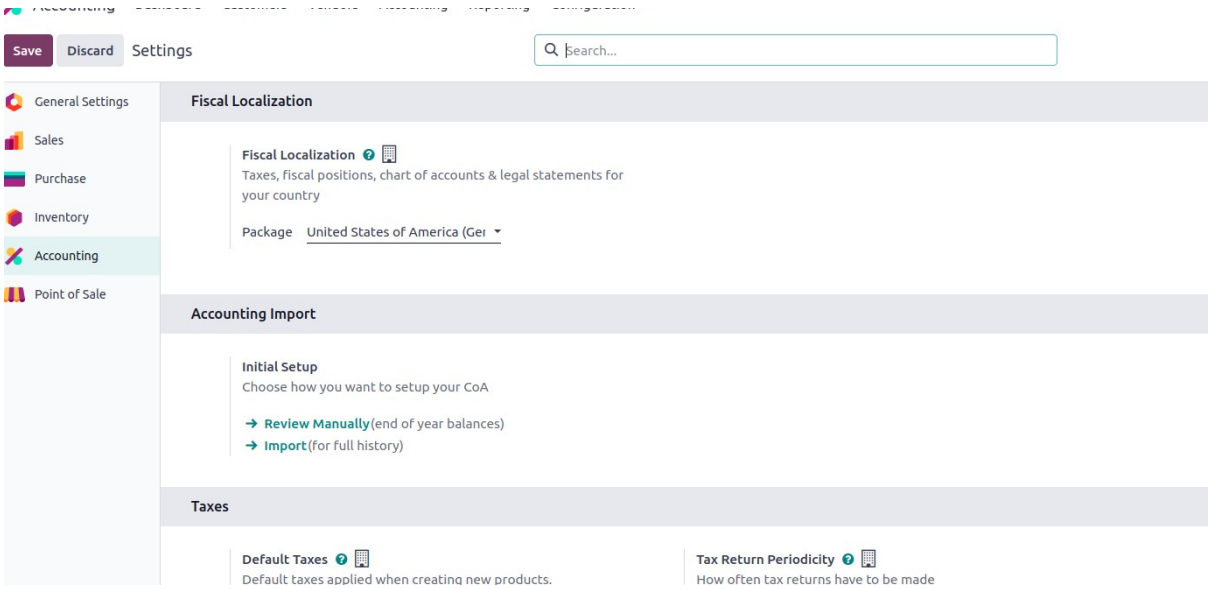


- When you click on **Confirm**, a confirmation popup will appear asking, "Are you sure you want to confirm?" Confirm your action to proceed.

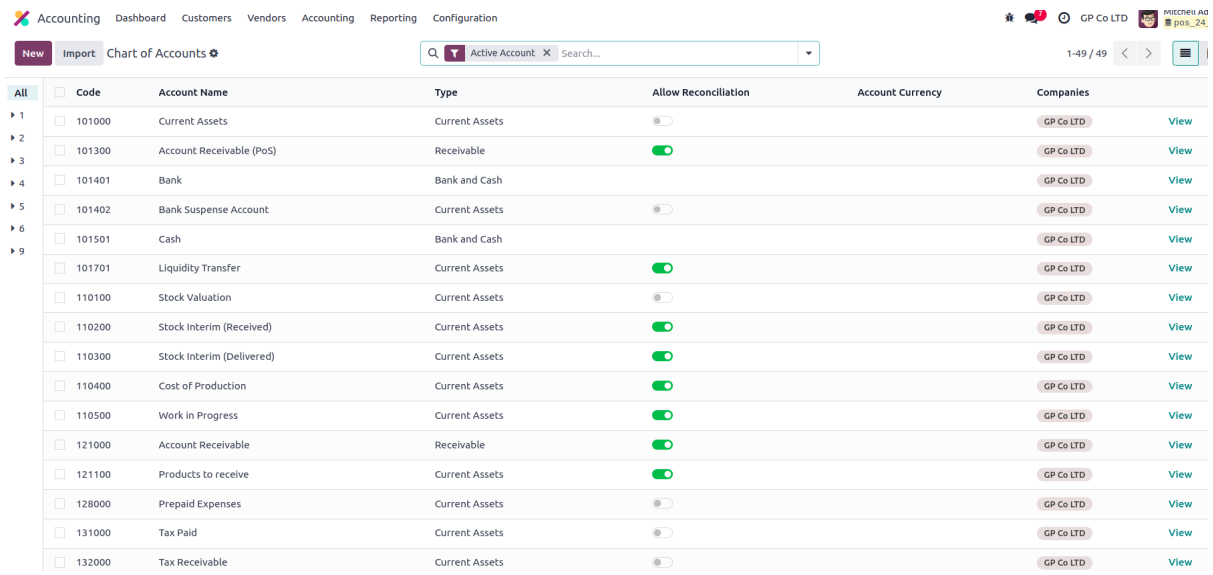
- You need to select the company for which you have set up the configuration.



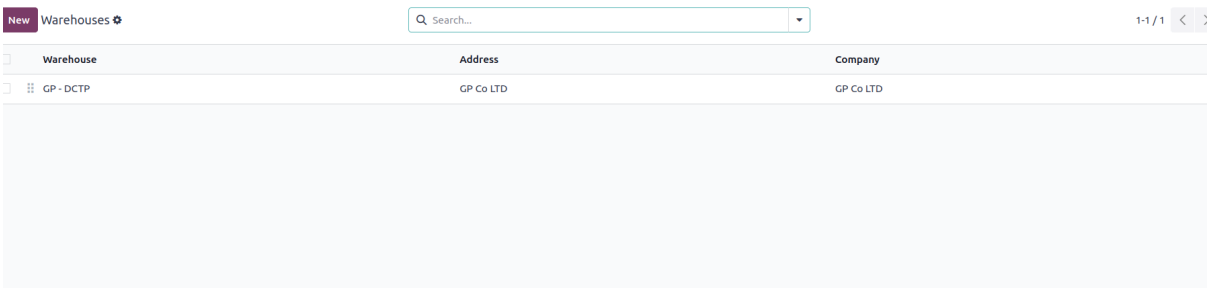
- When you go to **Accounting > Configuration > Settings**, you will find the fiscal package that you set up during the configuration.



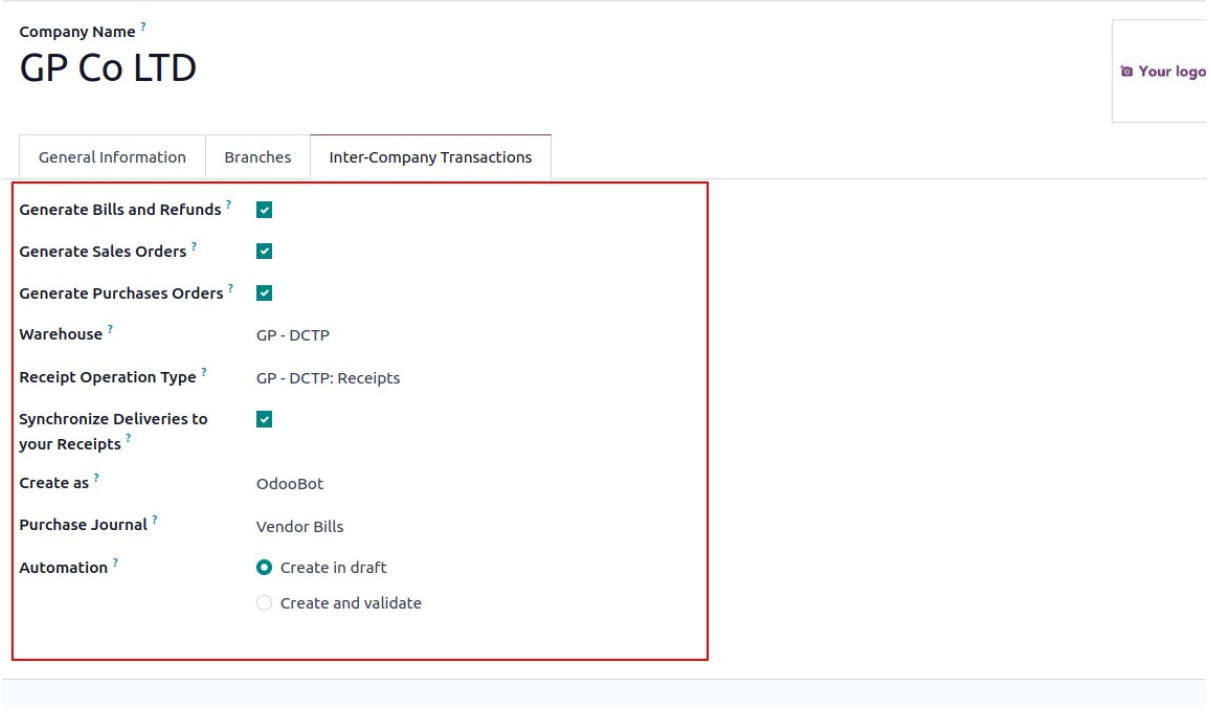
- You will see the **Chart of Accounts** under **Accounting > Configuration > Chart of Accounts**, which is set according to the respective fiscal package.



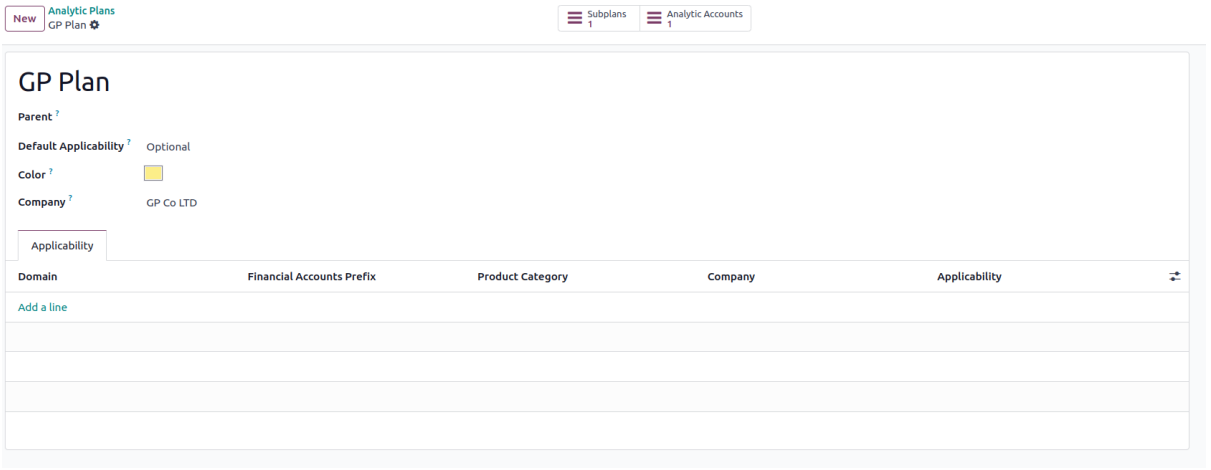
- When you go to **Inventory > Configuration > Warehouses**, the warehouse is set, and the name is added with the **DCTP** prefix.



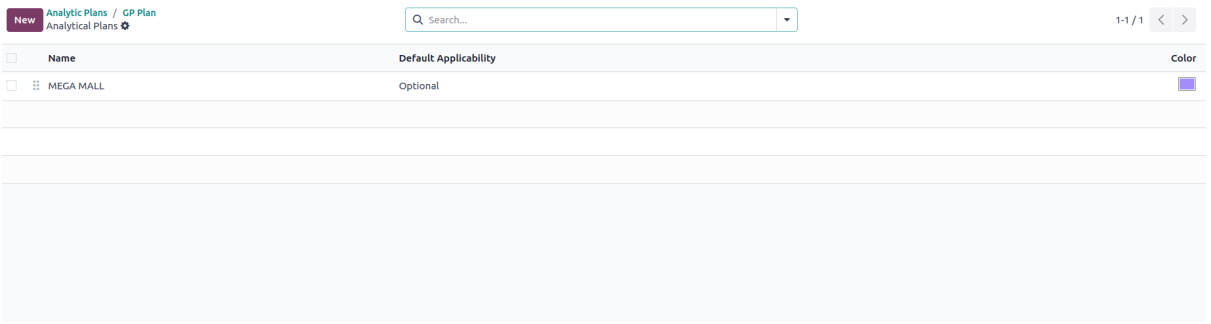
- Under the company settings, you will find the **Inter Company Transactions** tab by activating **Developer Mode**, and you will see the **Inter Company Transaction** automatically set.

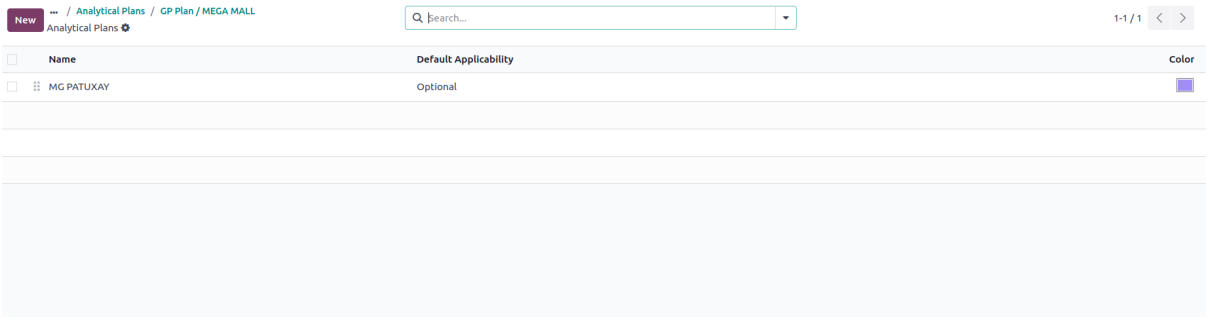


- When you go to **Accounting > Configuration > Analytic Plans**, you will see the newly created plan.

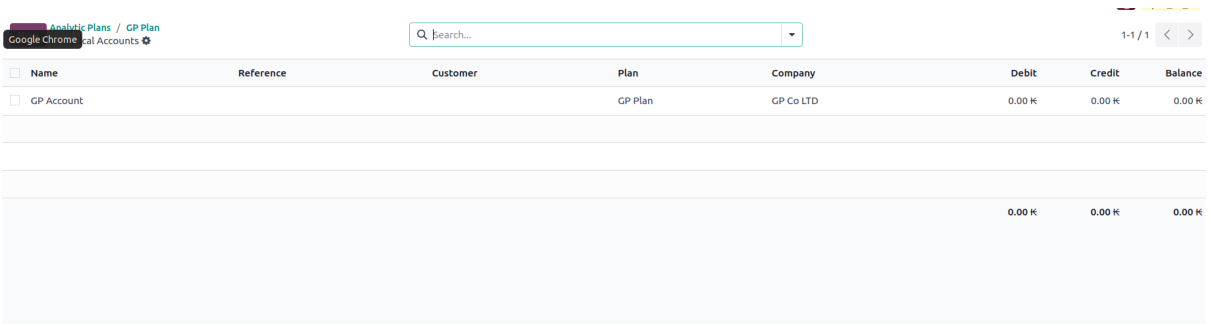


- When you click on **Sub Plans**, you will find the created sub-plan for the respective plan.

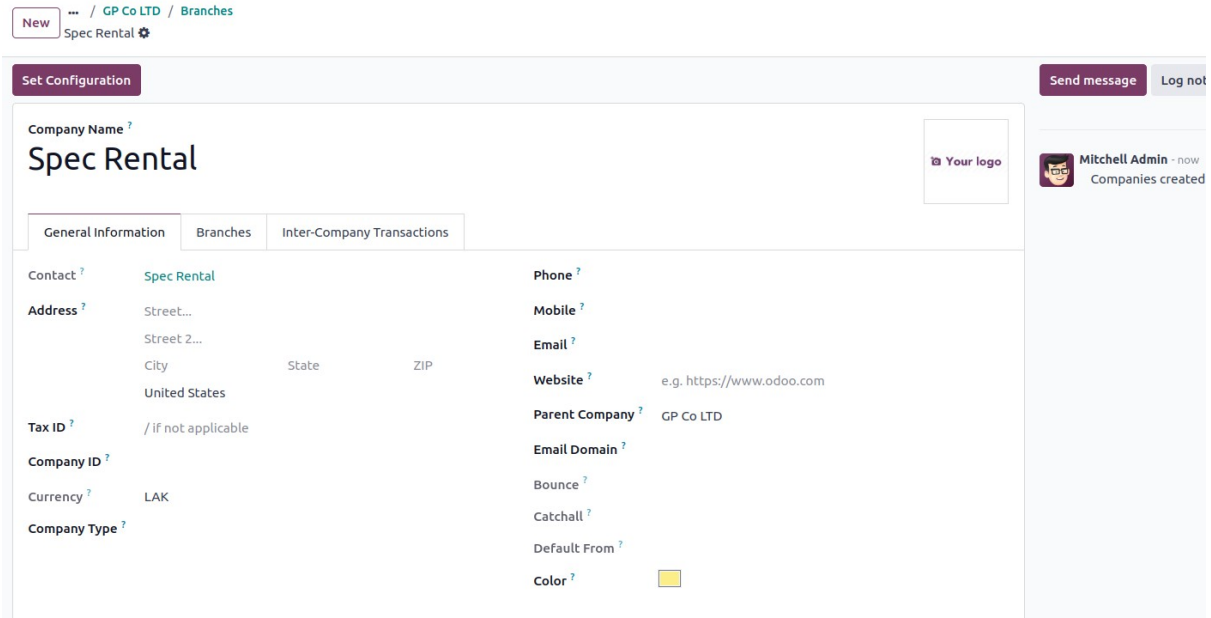


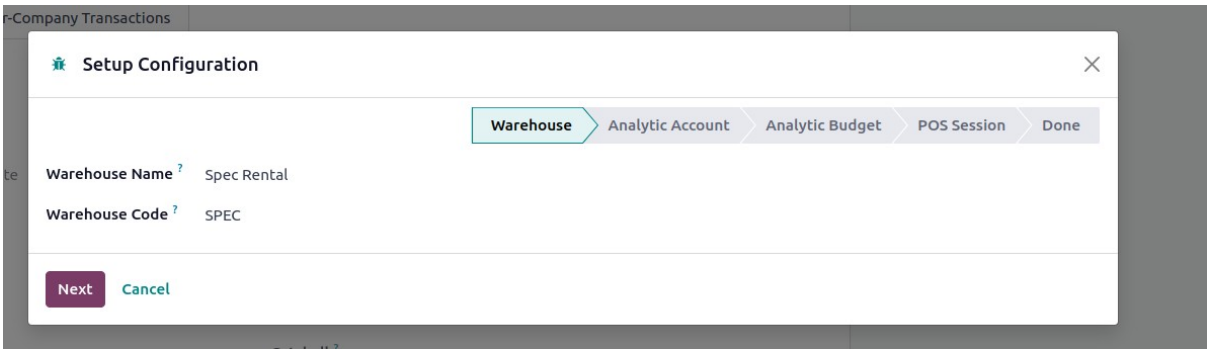


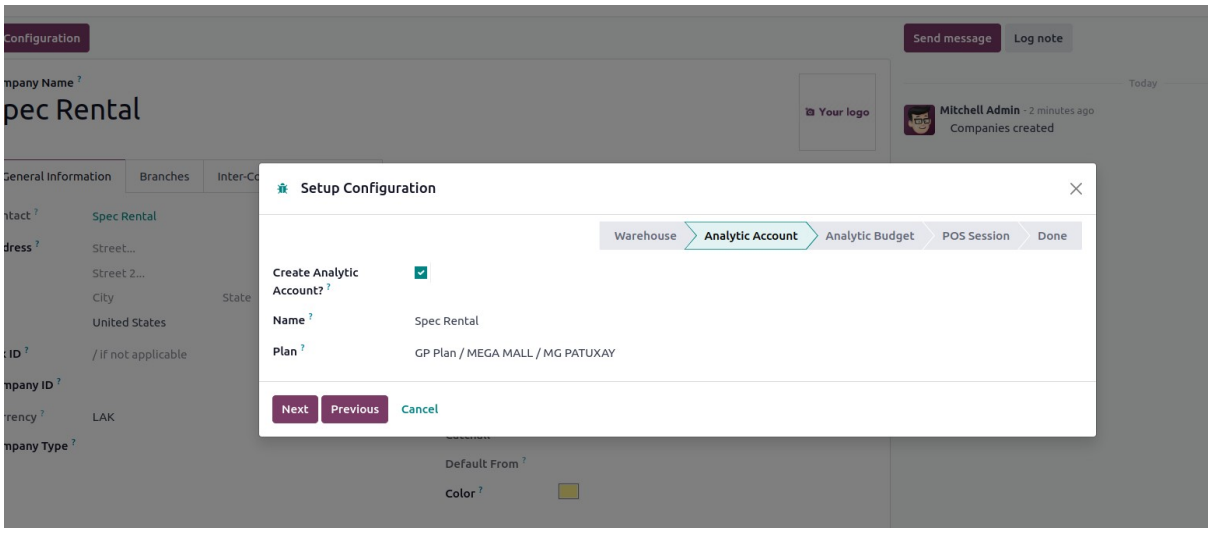
- When you click on **Analytic Accounts**, you will see the analytic accounts.



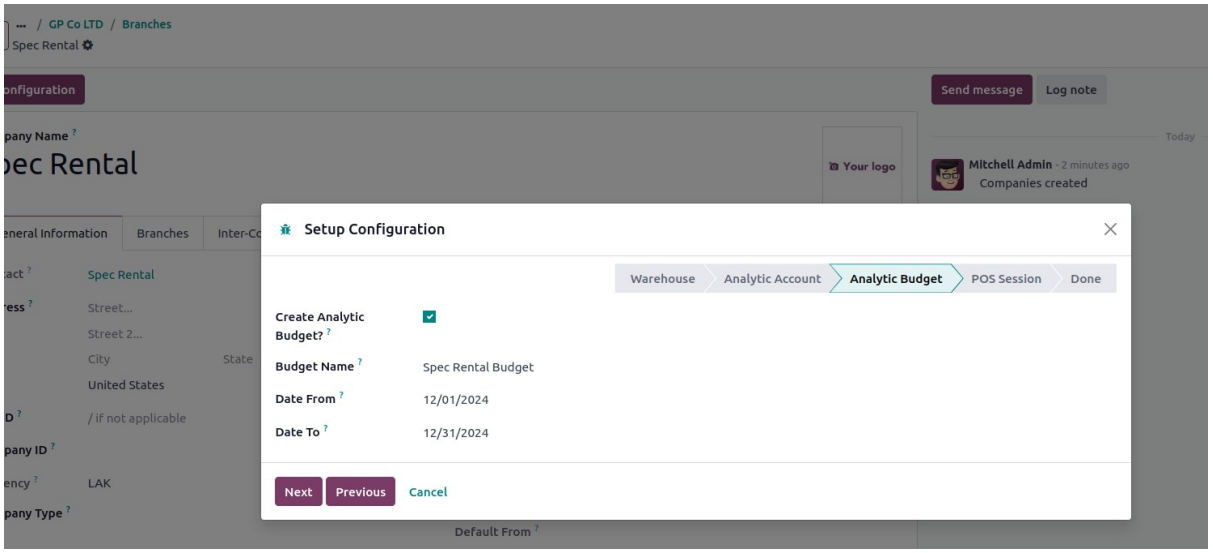
- As per the parent company, you can also set the configuration for company branches.



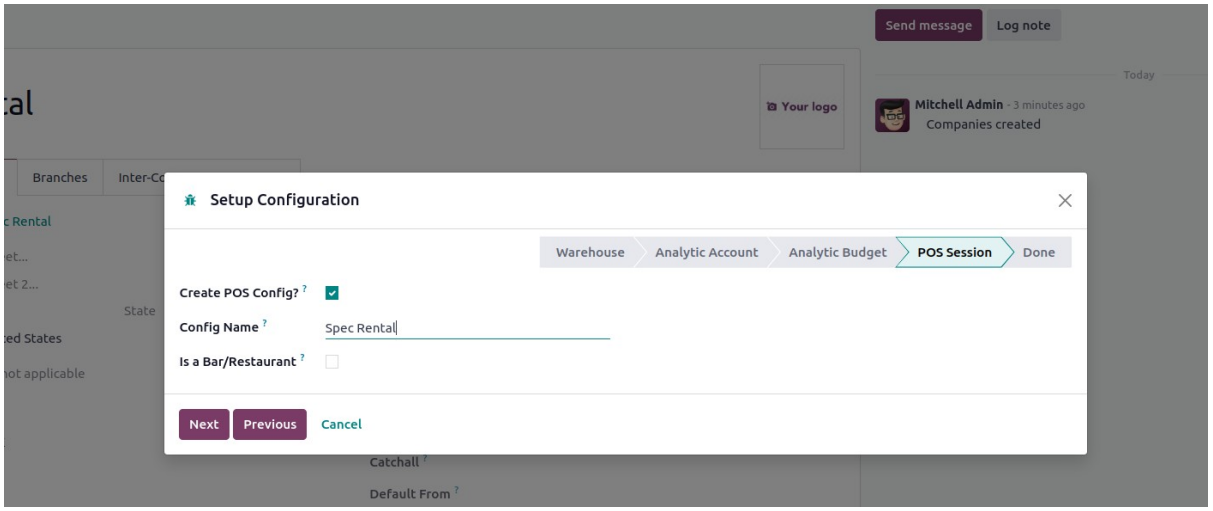


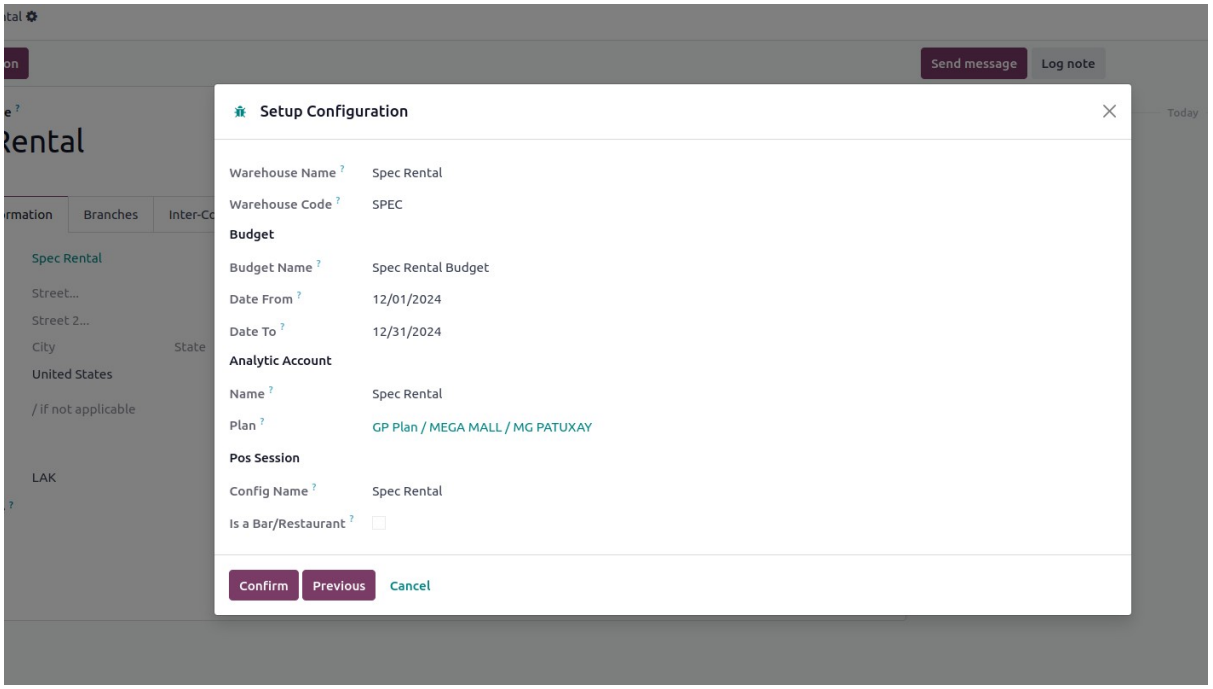


- You can create an **Analytic Budget** by providing a name and specifying the date periods.



- 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.





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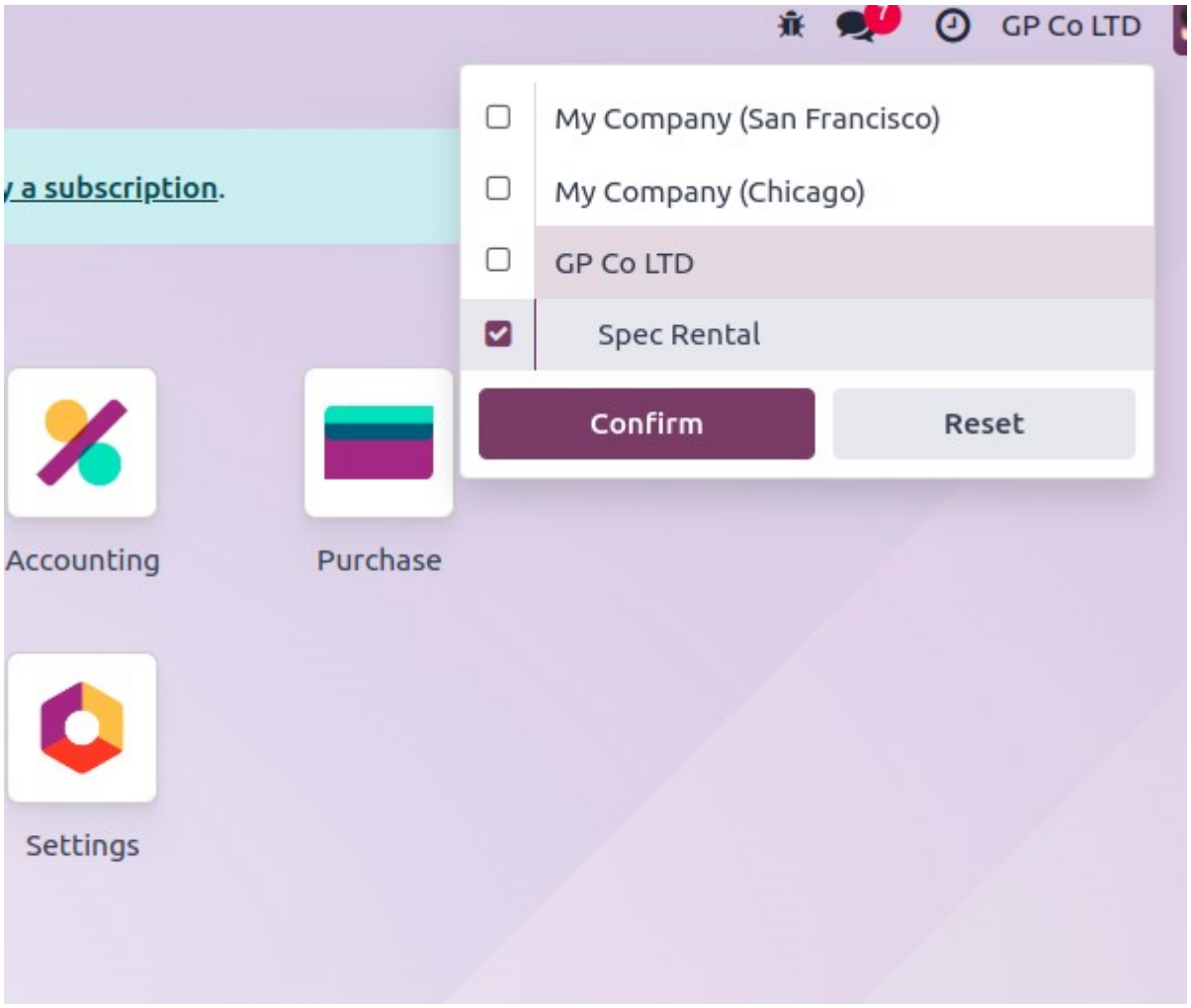
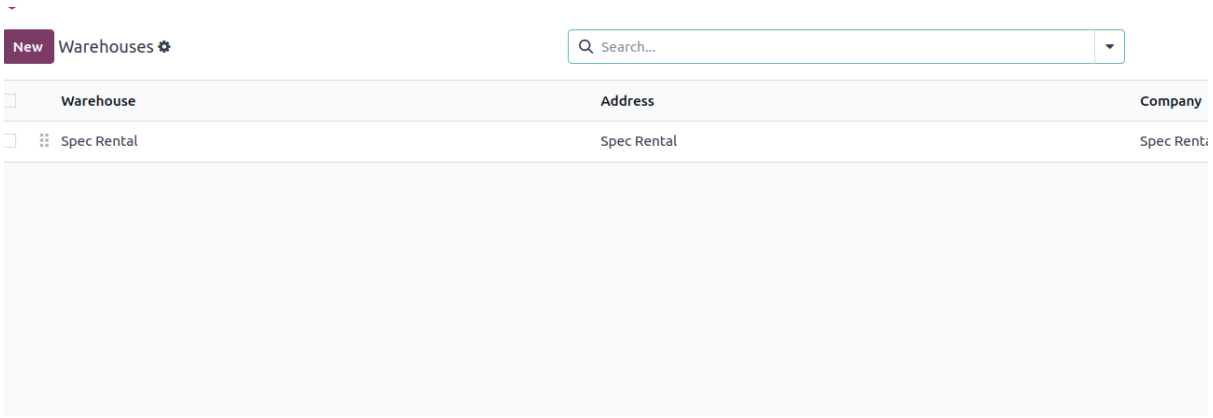
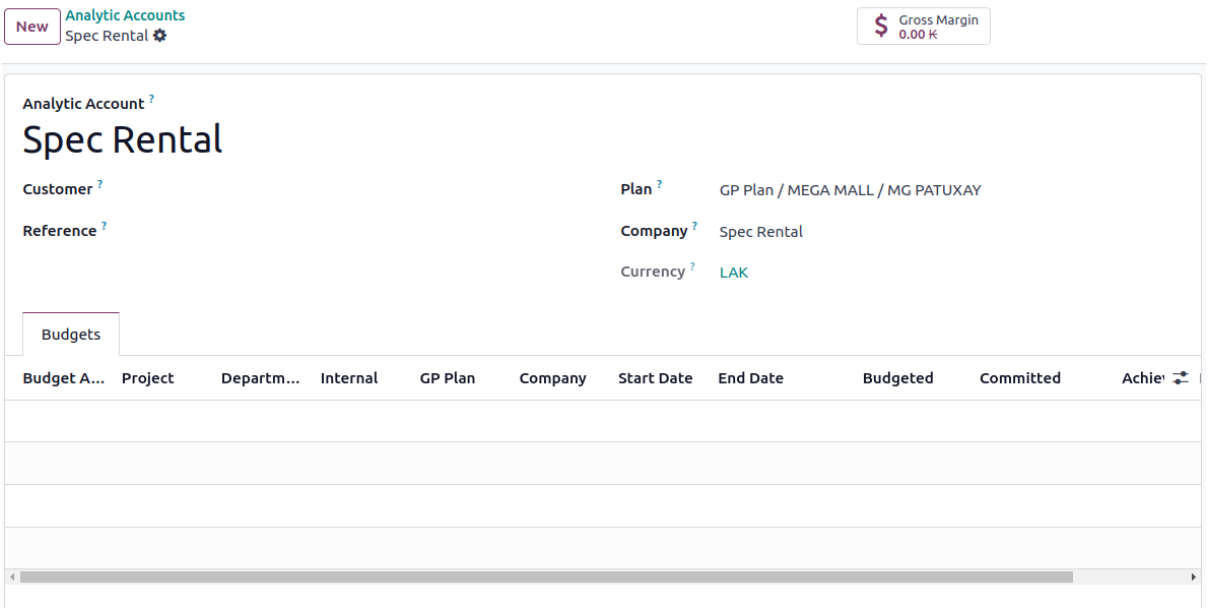
- You need to select the branch for which you have set the configuration.

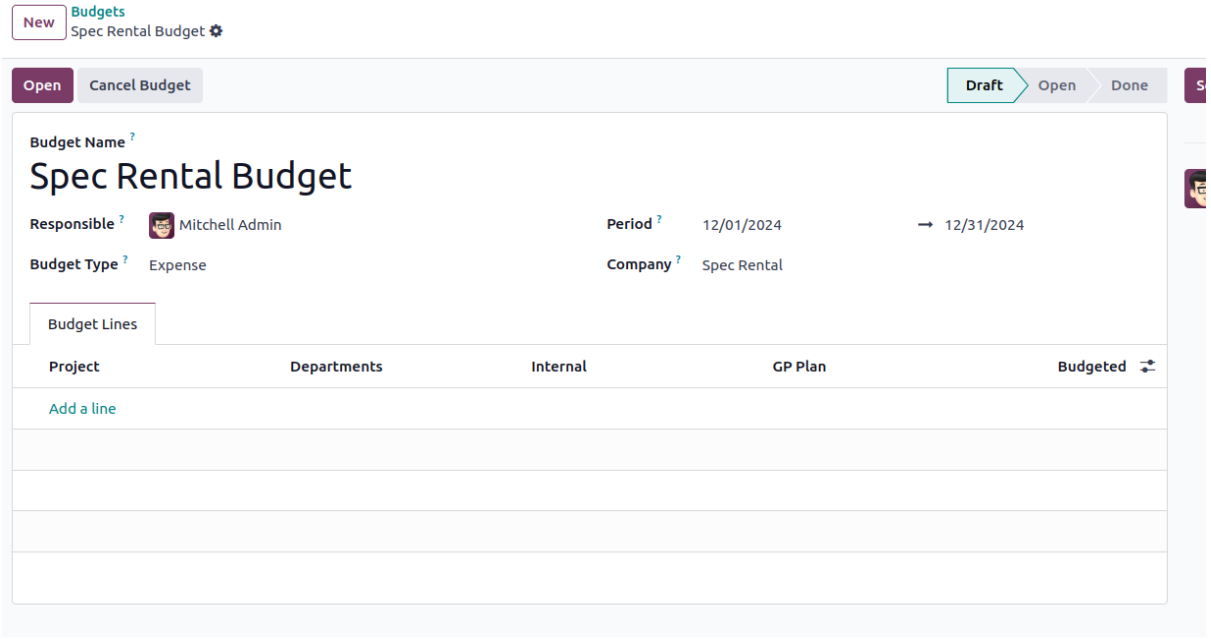
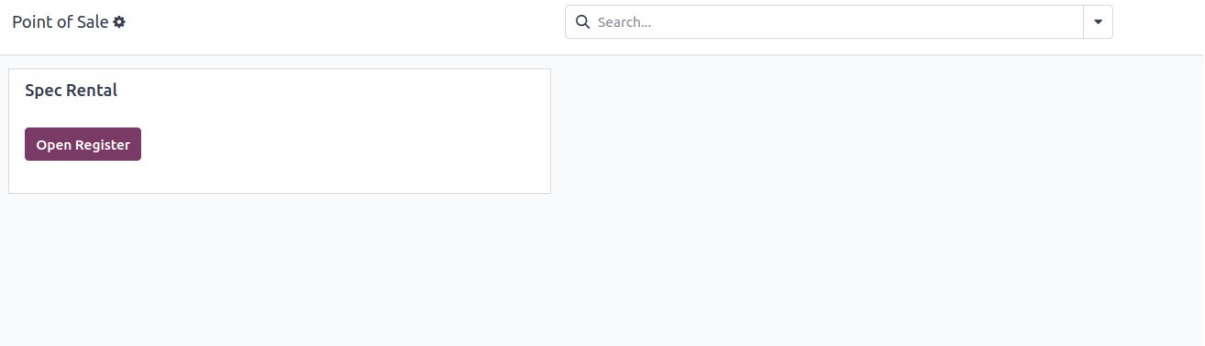
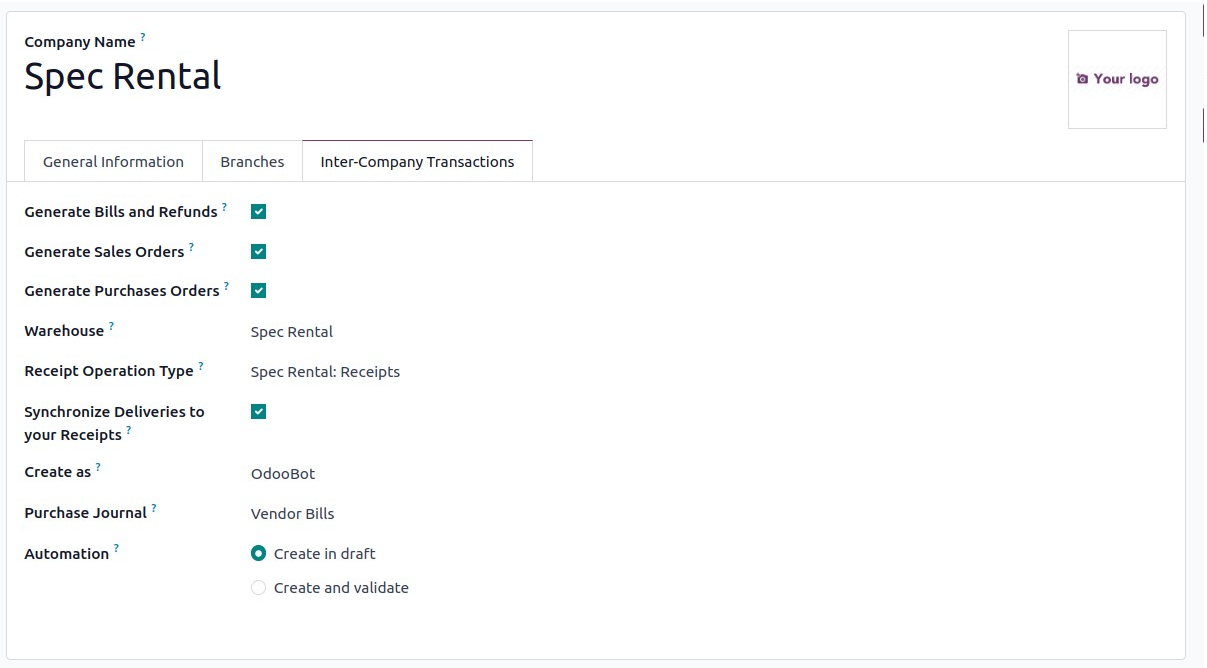

GP Co LTD
a subscription.
My Company (San Francisco)
My Company (Chicago)
GP Co LTD
Spec Rental
Confirm
Reset
Accounting
Purchase
Settings


New
Warehouses
Search...
Warehouse
Address
Company
Spec Rental
Spec Rental
Spec Rental

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



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



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