

INSTALLATION MANUAL

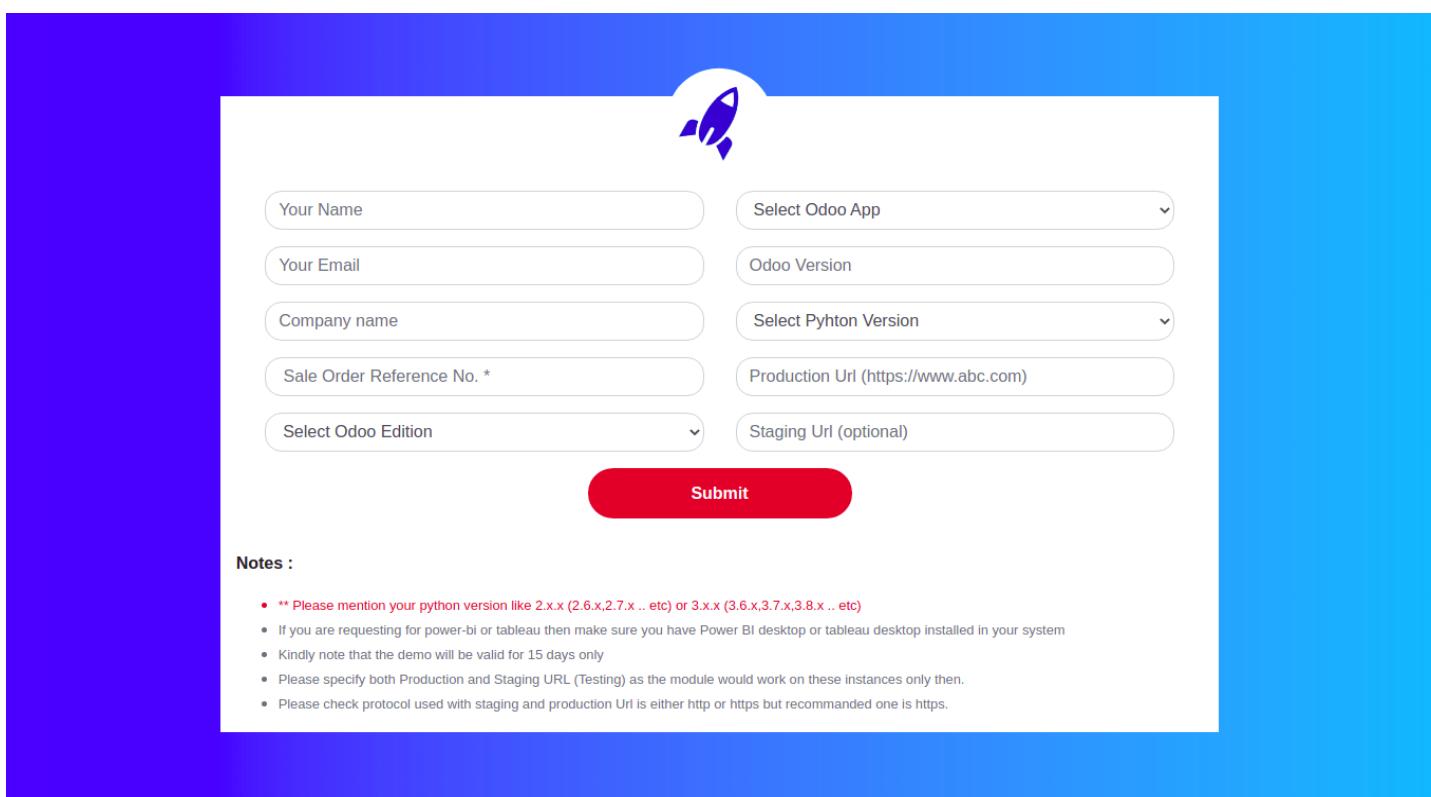
ODOO Power BI Connector

Before proceeding (**Important**) :

Please ensure that you have **PowerBI Desktop** installed on your Windows machine.

Requesting License Key :

Please visit following link : <https://odoo.techneith.com/request/>



The screenshot shows a web form titled "Request License Key" with a blue header and a white body. At the top center is a purple rocket ship icon. Below it are two rows of input fields:

Your Name	Select Odoo App
Your Email	Odoo Version
Company name	Select Python Version
Sale Order Reference No. *	Production Url (https://www.abc.com)
Select Odoo Edition	Staging Url (optional)

Below the form is a red "Submit" button. At the bottom left is a "Notes:" section with a list of instructions:

- ** Please mention your python version like 2.x.x (2.6.x,2.7.x .. etc) or 3.x.x (3.6.x,3.7.x,3.8.x .. etc)
- If you are requesting for power-bi or tableau then make sure you have Power BI desktop or tableau desktop installed in your system
- Kindly note that the demo will be valid for 15 days only
- Please specify both Production and Staging URL (Testing) as the module would work on these instances only then.
- Please check protocol used with staging and production Url is either http or https but recommended one is https.

Fill the form. You will need following details :

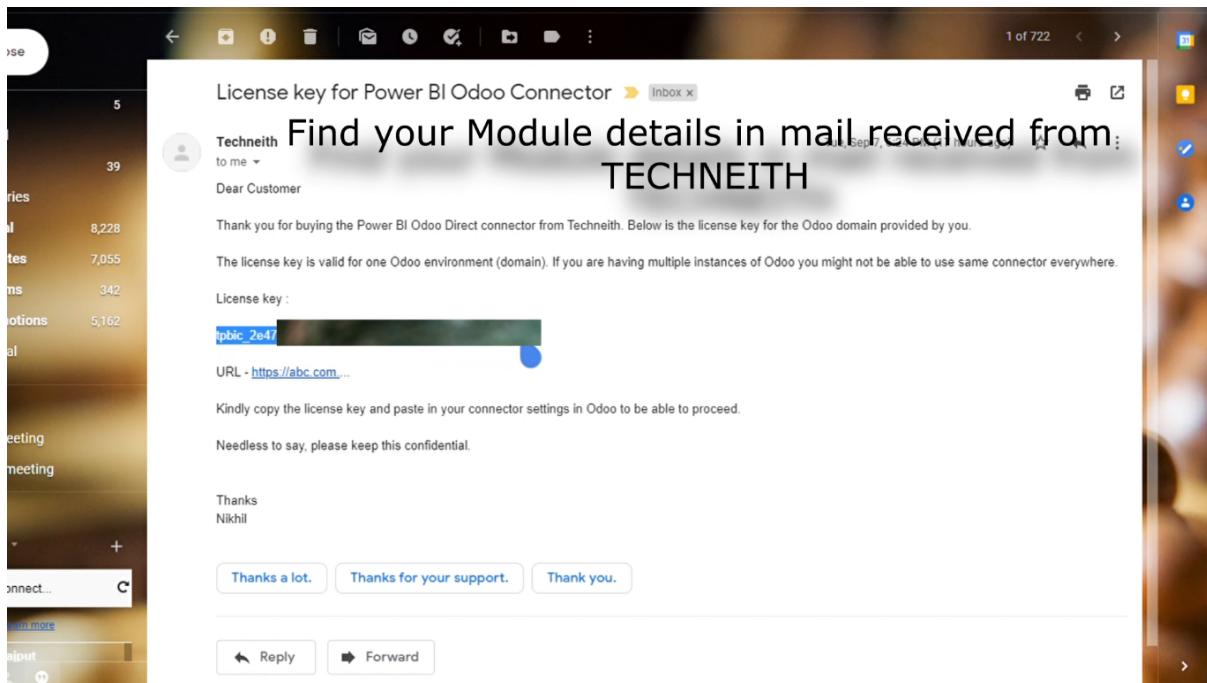
- Name
- Name of Organization
- Odoo Production and Staging URL
- Purchase/Invoice Number

On submitting the form successfully you will receive your license key on the e-mail you mentioned in the form within 48 hours.

STEP 1 : Module Verification

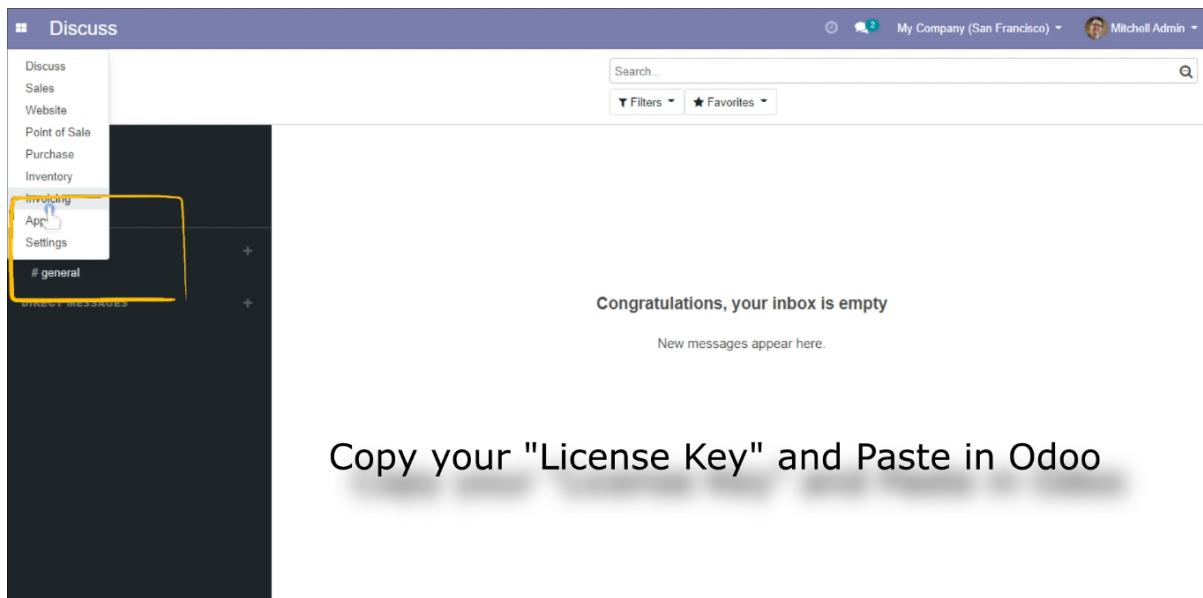
Install Module on your Odoo and follow below steps to verify your module

1.1 : Copy your License Key from email received from Techneith

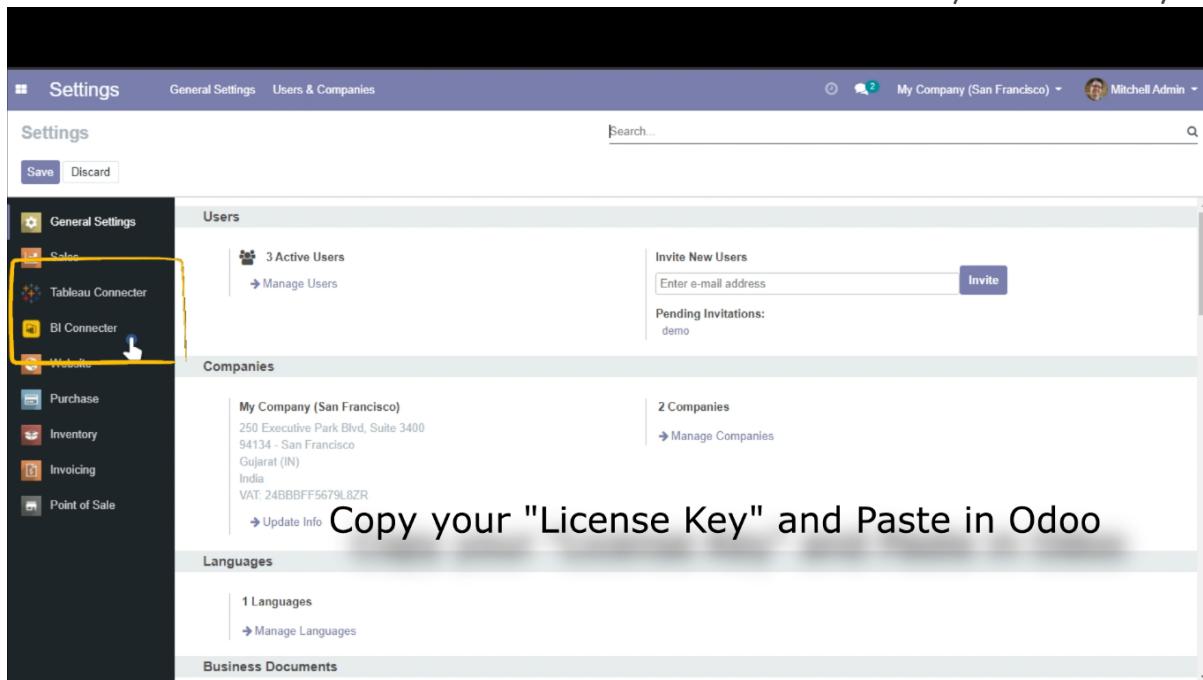


1.2 : Head to your OODOO and make sure you have installed the **PowerBI Connector Module.**

Once you have installed the module go to the **Settings page**.



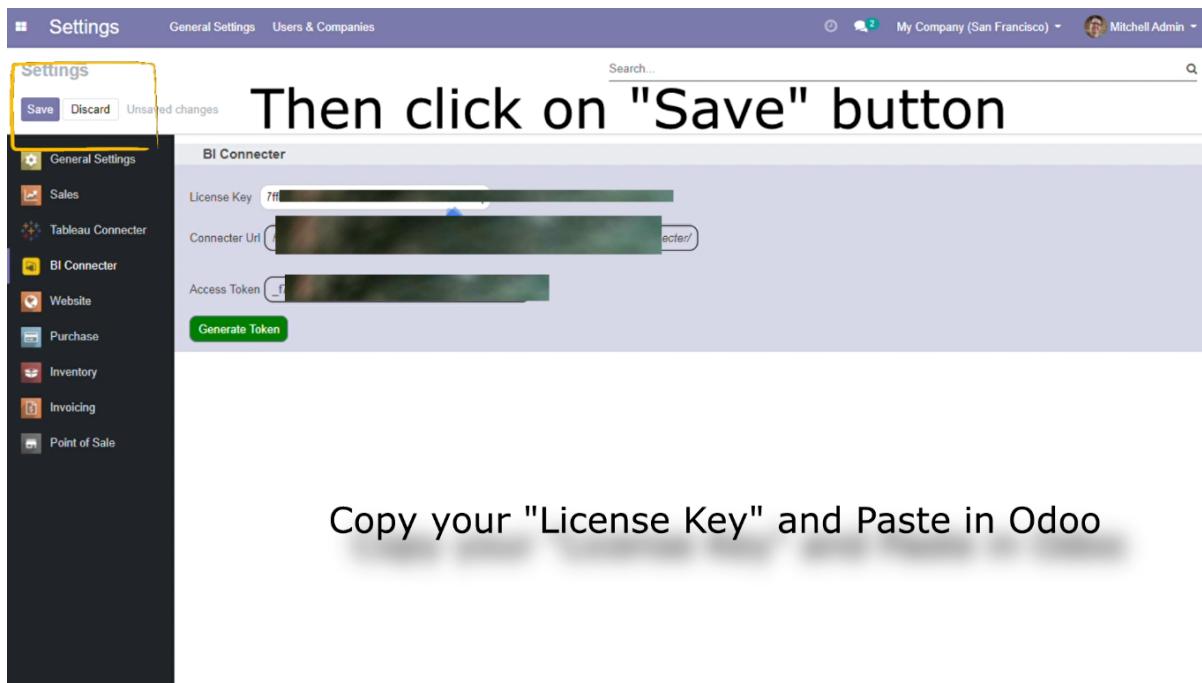
1.3 : Click Bi Connector on left panel (this will be available only after PowerBI Connector Module is installed on your ODOO)



1.4 : Paste your License Key in the License Key field (was copied in **Step 1.1**).

Then click **Save** and then **Generate Token**

(This generates your credentials to be used in PowerBI Desktop)



STEP 2 : Desktop Configuration

Use the **below link** to download the EXE file and run it on
the Windows machine on which Power BI Desktop is
installed.

Link :

<https://mega.nz/file/NvBUiRyR#8Q7-Kg7QyS8Hcpfuq7KsjwLpw5VFnpVACH0jKLzfHQ>

Run **powerbiconnector.exe** on your Windows machine.
(Right click on **powerbiconnector.exe** and click Run as Administrator)

This configures your PowerBI Desktop with Odoo Connector

Run "powerbiconnector.exe" you received with Module
This automatically configures Module on your System

After Running powerbiconnector.exe you can see feedback message and notification (as shown in below images)

This confirms our configuration is done successfully

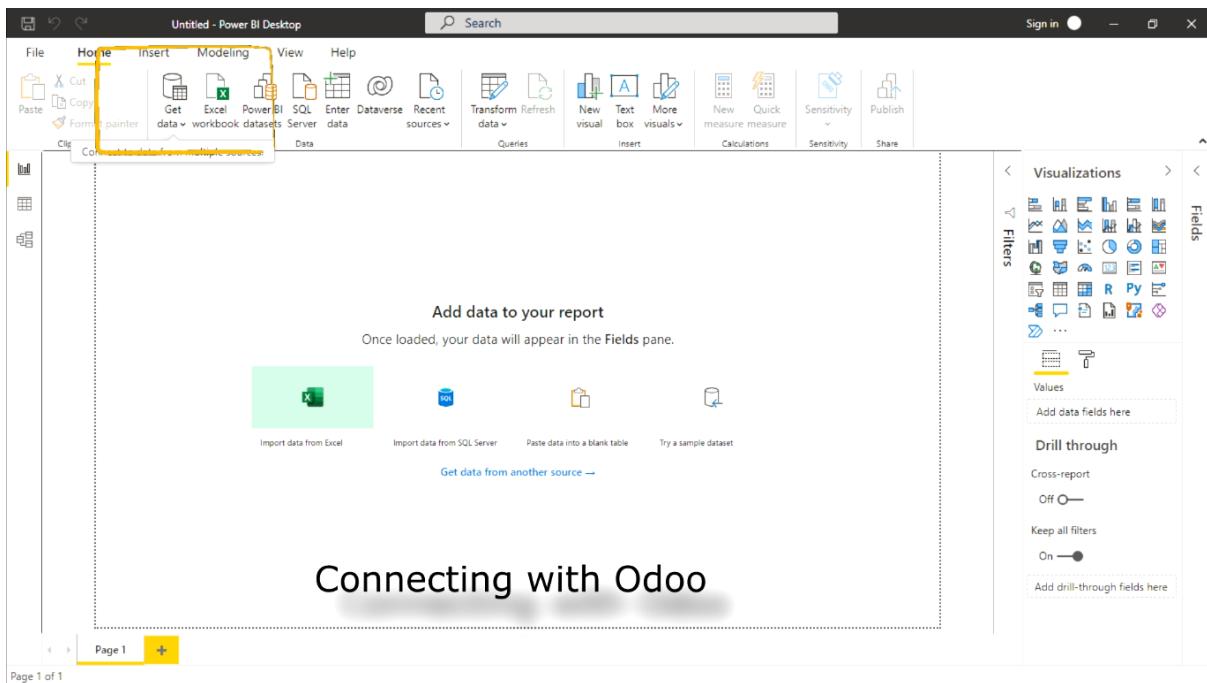
Run "powerbiconnector.exe" you received with Module
This automatically configures Module on your System

powerbiconnector.exe
Odo PowerBI Connector
Techneth Odoo-PowerBI Connector is successfully configured.

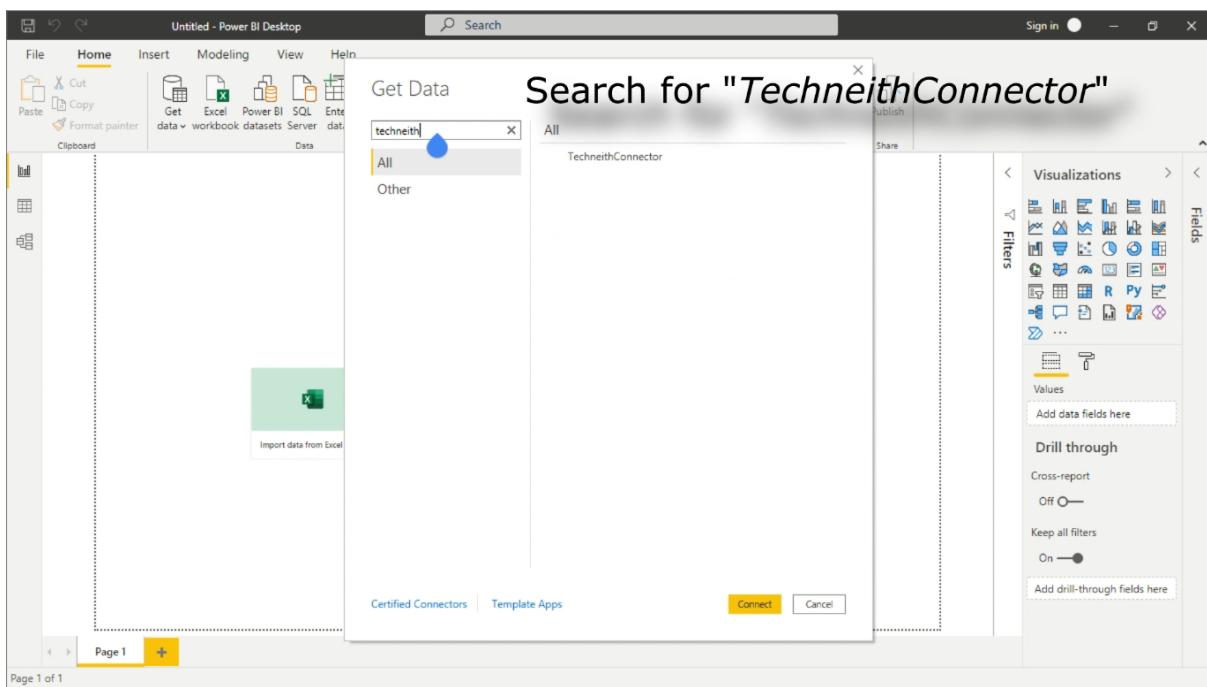
STEP 3 : Connecting with Odoo

Follow below steps to connect PowerBI with OODOO

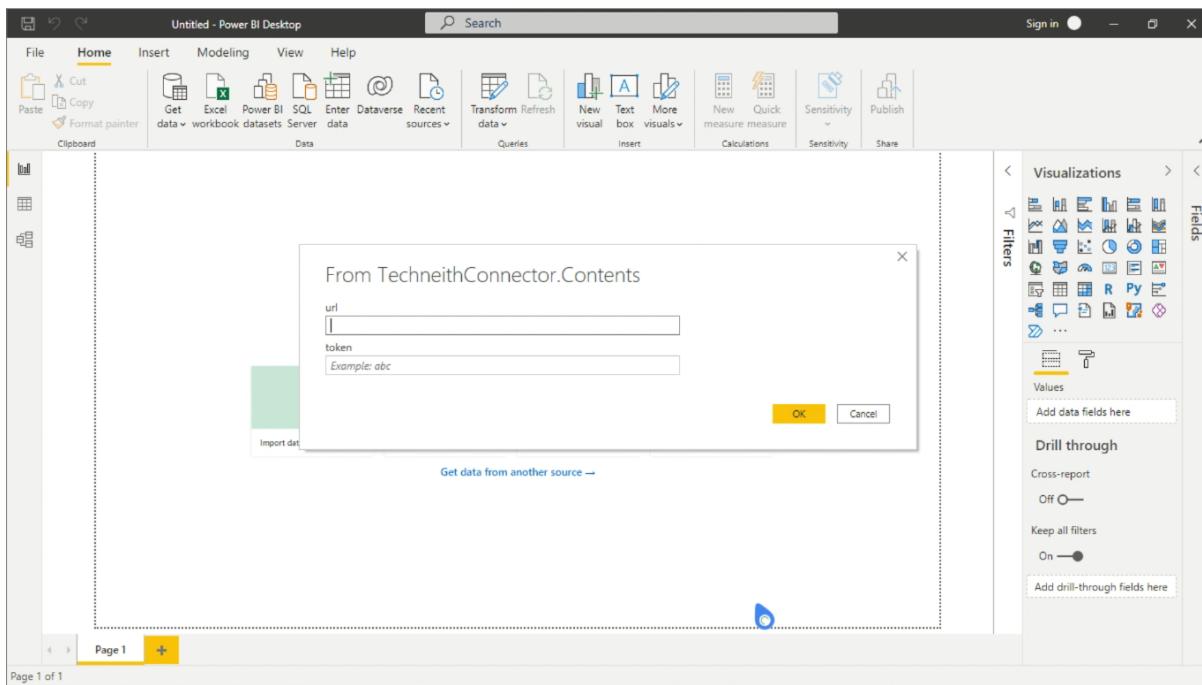
3.1 : Click **Get Data** on Home Tab in PowerBI Desktop



3.2 : Search for TechneithConnector in the Get Data window.
Then click Connect.



You will see the following screen.



We will fill these contents in **Step 4**

STEP 4 : Linking and Data Fetching

Follow below steps to link connector and fetch data

4.1 : Copy and Paste Connector Url and Access Token from OODOO (generated in step 1.4) to PowerBI Connector window (left in step 3.2)

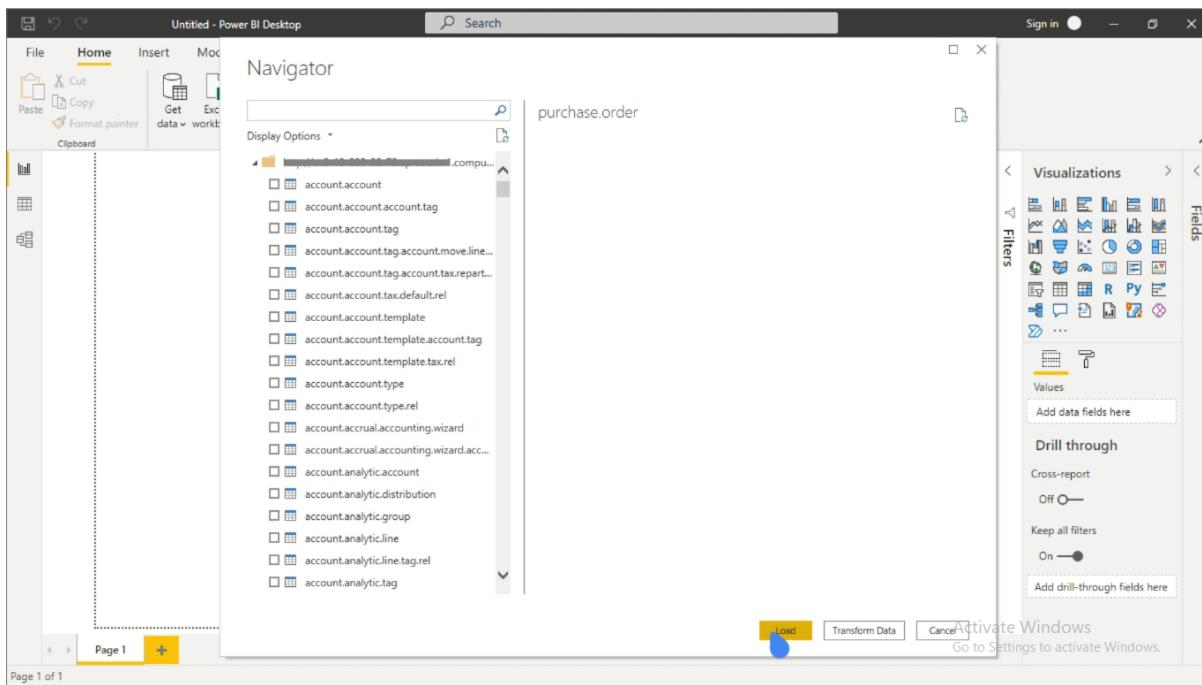
Copy from here and Paste Connector Credentials to PowerBI Desktop

Copy from here and Paste Connector Credentials to PowerBI Desktop

After step 4.1 click **OK**.

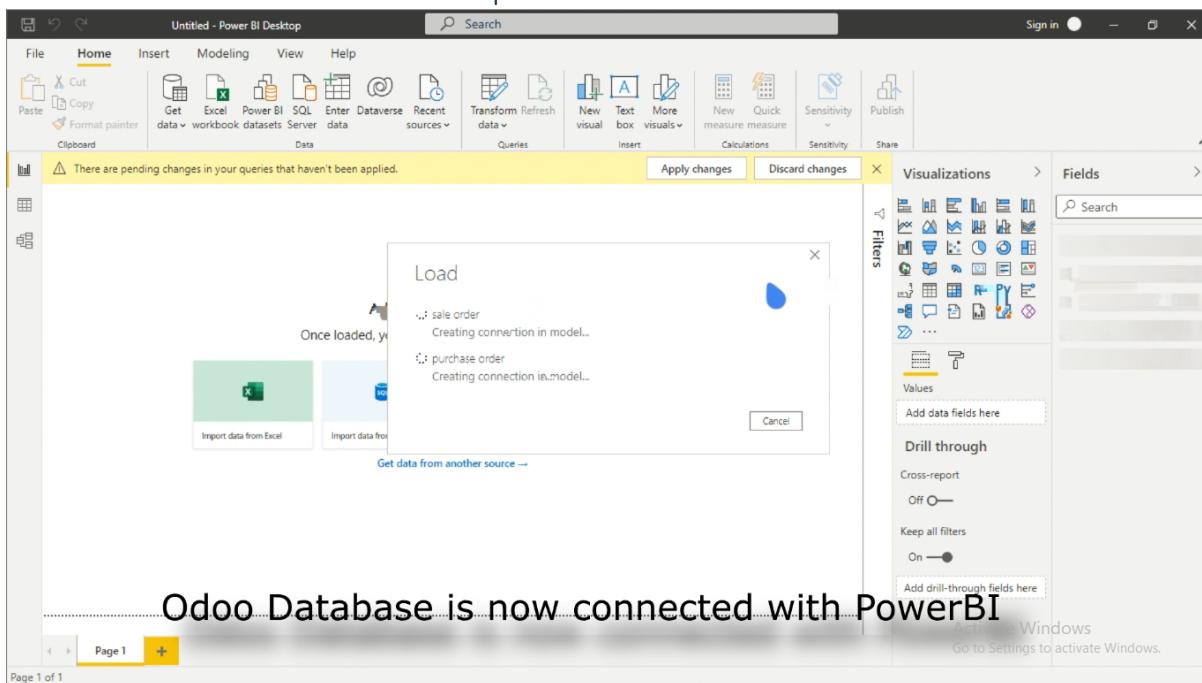
4.2 : You can see tables from your OODOO database.

Select tables you want to continue with in PowerBI and click Load.



4.3 : Tables are being fetched and You can see loading as shown in the below image.

Note : Time to load data depends on the size of data to be fetched



.....Odoo Database is now connected with PowerBI

4.4 : Odoo Database is now connected successfully with PowerBI Desktop and you can see content of your tables

The screenshot shows the PowerBI Desktop interface with a table titled "Tables from Odoo Dataset". The table has 66 columns and 68 rows. The columns include: access_token, state, date_order, validity_date, create_date, confirmation_date, user_id, partner_id, partner_invoice_id, partner_shipping_id, name, ref, and several date/time fields. The data shows various sales orders with different states (e.g., draft, confirmed) and dates. A "FIELDS" pane on the right lists numerous Odoo fields such as activity_id, amount_tax, analytic_account_id, campaign_id, client_order_ref, company_id, confirmation_date, create_date, create_uid, date_order, fiscal_position_id, and many more. The status bar at the bottom indicates "Activate Windows" and "Go to Settings to activate Windows".

How to Reflect Data change in PowerBI Desktop if there is change in data in ODOO

Click on the **Refresh** in Home tab.

(This loads and reflects the changes happened to data in OODOO)

powerbico - Power BI Desktop

File Home Help Table tools

Cut Copy Paste Get data Excel Power BI SQL Server Enter Dataverse Recent sources Transform Refresh data Manage relationships New measure column Quick New table Manage roles View as Publish

Clipboard Data Calculations Security Share

Get the latest data by refreshing all visuals in this report.

Fields

Segment Country Product Discount Band Units Sold Manufacturing Price Sale Price Gross Sales Discounts Sales COGS Profit Date

Segment	Country	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS	Profit	Date
Government	Germany	Carretera	None	1513	3	350	529550	0	529550	393380	136170	01 December 2014
Government	Germany	Paseo	None	1006	10	350	352100	0	352100	261560	90540	01 June 2014
Government	Canada	Paseo	None	1725	10	350	603750	0	603750	448500	155250	01 November 2013
Government	Germany	Paseo	None	1513	10	350	529550	0	529550	393380	136170	01 December 2014
Government	Germany	Velo	None	1006	120	350	352100	0	352100	261560	90540	01 June 2014
Government	France	VTT	None	1527	250	350	534450	0	534450	397020	137430	01 September 2013
Government	France	Amarilla	None	2750	260	350	962500	0	962500	715000	247500	01 February 2014
Government	Mexico	Carretera	Low	1210	3	350	423500	4235	419285	314600	104685	01 March 2014
Government	Mexico	Carretera	Low	1397	3	350	488950	4889.5	484060.5	363220	120840.5	01 October 2014
Government	France	Carretera	Low	2155	3	350	754250	7542.5	746707.5	560300	186407.5	01 December 2014
Government	Canada	VTT	Low	943.5	250	350	330225	3302.25	326922.75	245310	81612.75	01 April 2014
Government	Mexico	VTT	Low	1397	250	350	488950	4889.5	484060.5	363220	120840.5	01 October 2014
Government	Canada	Carretera	Low	2852	3	350	998200	19964	978236	741520	236716	01 December 2014
Government	Canada	Paseo	Low	2852	10	350	998200	19964	978236	741520	236716	01 December 2014
Government	Germany	Velo	Low	2966	120	350	1038100	20762	1017338	771160	246178	01 October 2013
Government	Germany	Velo	Low	2877	120	350	1006950	20139	986811	748020	238791	01 October 2014
Government	Germany	VTT	Low	2877	250	350	1006950	20139	986811	748020	238791	01 October 2014
Government	United States of America	VTT	Low	266	250	350	93100	1862	91238	69160	22078	01 December 2013
Government	Mexico	VTT	Low	1940	250	350	679000	13580	665420	504400	161020	01 December 2013
Government	Germany	Amarilla	Low	2966	260	350	1038100	20762	1017338	771160	246178	01 October 2013
Government	Germany	Montana	Low	1797	5	350	628950	18868.5	610081.5	467220	142861.5	01 September 2013
Government	Mexico	VTT	Low	1642	250	350	574700	17241	557459	426920	130539	01 August 2014
Government	United States of America	Carretera	Low	274	3	350	95900	3836	92064	71240	20824	01 December 2014

Table: financials (700 rows)