Introduction to Odoo Business Apps

Release 8

English version

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1 Welcome on Board

Odoo is the most popular Open Source Suite of Business Applications, with tons of different features in various functional areas. Odoo is 100% web-based: you only need a web browser to get started (Google Chrome, Safari, Internet Explorer, Mozilla Firefox).

This tutorial gives you a guided tour of the Odoo transversal apps in an intuitive, hands-on way. The following questions will be answered:

- How to set up your instance (company, user, language)?

- How to encode/import your first contacts with Odoo Address Book?

- How to efficiently navigate Odoo (views, filters, and more)?

- How to empower your internal and external communication with Odoo Social Network & Instant Messaging?

- How to manage your time with Odoo Calendar?

- How to get things done and to share collaborative documents with Odoo Notes?

1.1 Open Source?

1. The software is free to use (no license cost). The Odoo business model is based on quality services: hosting, migrations, bug fixing, customizations, etc.

2. The Odoo source code is publicly shared, so anyone who wants to modify it or add his own custom-made apps can do so. Odoo SA certifies more than 200 official business applications that can be used in all areas. Our community is also implicated in the product life and has been developing 3000 extra applications tailored to specific needs. See all our apps at http://www.odoo.com/apps.
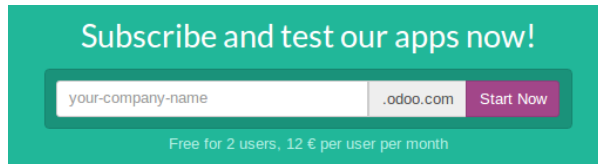
1.2 Online vs On-premise

Odoo can be used online or deployed on your own server. For your first steps with Odoo, we recommend you to use the Online version first:

- Start in a few clicks;

- Benefit from all the certified Odoo applications;

- Fully configured: email integration, pads, dns, etc.;

- Backups, monitoring, redundancy, instance management.

2 Getting Started with Odoo

2.1 Create an Odoo Online Instance

Go to http://www.odoo.com and click *CRM*. Then, enter the name of your instance (with "-" if needed but without spaces or "_") and click *Start Now*. Next, enter the required data to create your Odoo account (necessary to create the admin user) and click *Start Using*.

You now have your own instance which will be available at the following web address: yourname.odoo.com. CRM has already been installed.

Let's get some settings straight first!

2.2 Set up your Company

Click the Odoo logo at the top left corner in order to set your company's information & logo.

2.3 Create a New User

Go to *Settings → Users → Users* and create a new user for your colleague. Do not use the same email address. Each user should have his own email address to log on.

Note:

- **Email**: *the email address you set, is the one the user has to enter when he logs on to Odoo. As soon as you save the page, Odoo sends a message to that email address so this new user can sign up to Odoo.com and get access to your instance. The new user can choose his own password.*
- **Access Rights**: *The user form allows you to assign specific access rights for each installed application. When you install a new app, have a look at the access rights you can grant to users.*
    - **Portal**: *dedicated to external users (i.e. customers to retrieve their orders, invoices in the customer portal).*
    - **Technical Features**: *reserved for the instance admin/configurator (access to technical menu).*
- **Messaging Alias**: *on the* Preferences *tab, you find the internal email address used by Odoo Messaging. If you send an email to that address from an external mailbox, you will receive the message in your Odoo Inbox. Read more about messages in the chapter concerned.*
- **Receive Messages by Email**: *For all the messages received in your Odoo Inbox, a notification can be sent to your external email address (the one used to log on to your Odoo.com account). Here you can change your notification rule.*

2.4 Install a Second System Language

Each user can use Odoo in his own language. Go to *Settings → Translations → Load a Translation* and install a second language. You can set a default language for each user in the User form. You can also change it in your *Preferences* (top right side of the screen).

3 Populate your Address Book

3.1 Enter your First Contact
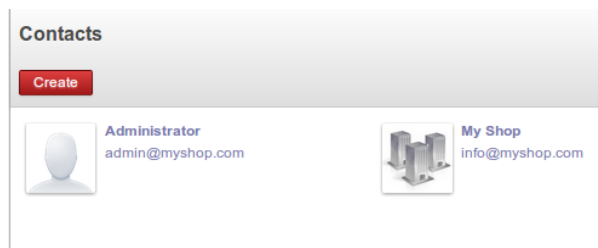
Create your first contact in Form view.

- **Blue Field**: *mandatory field*
- **Lookup fields**: *From Form view, Odoo allows you to open a new list/form in order to select or create another record. There are 3 different types: many-to-one (e.g. countries), one-to-many (e.g. contact persons for a company), many-to-many (e.g. contact tags).*
- **Tooltips**: *hovering the mouse over the field name will display a short help text.*
- **Tab key**: *If the value (content) of a field can be selected from a list of records (e.g. countries), you can quickly select the one required by entering part of its name in the field and hit the* Tab *key.*
- **Create and Edit...**: *If the value of a field can be selected from a list of records, you can quickly create a new one by clicking the drop-down list arrow and selecting* Create and Edit. *A new form view will open.*
- **Search More**: *If the value of a field can be selected from a list of records and if the desired record does not appear directly in the drop-down list, you can open the complete list of records by clicking 'Search More'.*
- **Back & Forward buttons**: *In form view, use the back/forward arrows to display the form view of the previous/next record.*
- **More button**: *allows to open related records, delete and duplicate the current record.*
- **Print button**: *shows reports associated with the selected record (when available).*

3.2 Import your Address Book

If you already have a list of contacts, you would waste time if you start entering each item one by one. Let's import your contact list!

- From the List ☰ view, click *Import* in order to import your address book saved in CSV (Comma Separated Values, can be generated from Excel, Libre Office Calc, Google Spreadsheet, ...). Have a look at the CSV file shared in your training material repository. You have to follow the same structure. It will help you to make your first import.

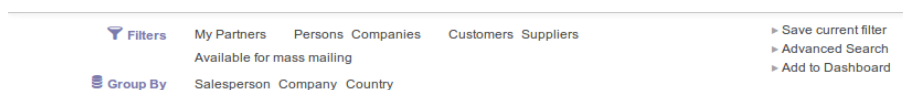- Once imported, sort the contacts by inverse alphabetical order.

Note:

- *In your spreadsheet file, each column has to be dedicated to a specific Odoo field. The first row contains these dedicated fields.*

Tip:

- *Odoo comes with different kinds of views: List view will show an overview of similar records at a time. To get more specific information about a record, you can switch to Form view.*
- *If you want to go further with the import, have a look at the Frequently Asked Questions in the Import interface.*
- *For complex imports, send your request to online@odoo.com! We import any kind of data for you: https://www.odoo.com/page/pricing.*

3.3 Discover the Power of Filters

In the imported address book:

- How many physical contacts do you have?

- Display the contacts ('persons' in the filter) and group them by country, then by company.

- Save the current filter in order to retrieve it next time.

- Make an advanced search to get all customers located in New York itself.

4 Improve your Internal & External Communication

4.1 Add Followers and Engage Discussions with them
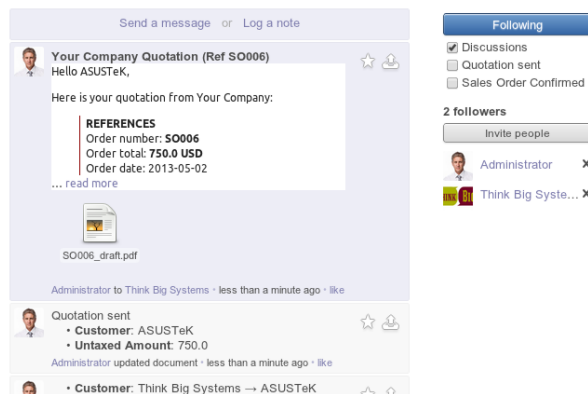
A chatter is available below the form view of various business items. This feature allows you to considerably improve the internal and external communication: any user or external people can be added as followers. Status updates are included as automatic messages. Followers receive email notifications in case of a new message in their inbox.

- Open the form of one of your contacts.

- Add your colleague as a follower and send him a message from the chatter (e.g. "I would like to present him to you; he is managing a similar company and could help you in developing the market.").

- If you log on as this colleague, you will find the message in your external mailbox. Click the *Access your messages and documents in Odoo* link to open the contact form and display the context and the message history.

Each contact can set up his own notification preferences for each business document he is following.

4.2 Easily Create a ToDo List from your Inbox
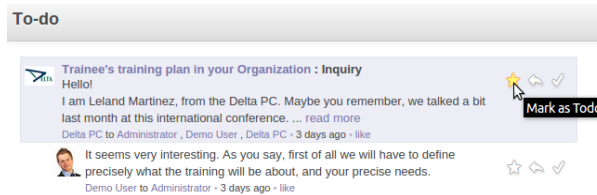
Some messages may require some actions on your side.

- Click the Star to gather those actions in your ToDo list.

- Once you have read all your messages in the morning, look at your Todo menu item. You get a list of all the tasks you have to perform.

- Reply to people or click "V" to mark the message as done.

4.3 Start a Discussion Group

Users can exchange messages, attach documents and receive discussion updates concerning the groups they joined.

In the *My Groups* section, you can set up and join discussion groups. Each discussion group has its own privacy settings. You can create internal or public groups. Everytime someone posts a message to the group (or replies to a message), all the followers get a notification in their Inbox.
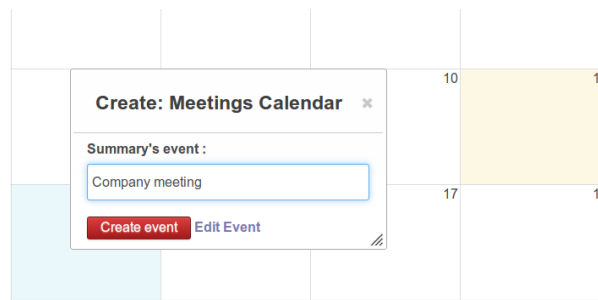
4.4 Chat with your colleagues
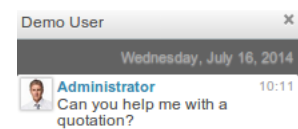
- Install *Instant Messaging* and chat with your connected colleagues (internal database users).

- Click the [ ] icon at the top of the screen to display the available contacts.
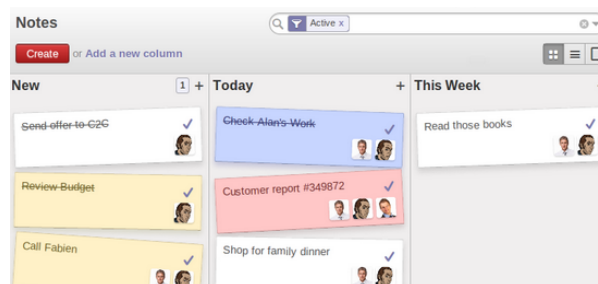
5 Manage your Time Efficiently!

5.1 Manage your Agenda

Get your meetings, yours holidays, ... Get your calendar anywhere and never forget an event.

- Install the *Calendar* app.

- Create a meeting and share it with some attendees in your address book. They will receive a notification by email.

5.2 Create Collaborative Notes and Get Things Done!

Organize yourself with efficient to-do lists and notes. From personal tasks to collaborative meeting minutes, you can increase the productivity of your employees by giving them the right tools to prioritize their work, share their ideas and collaborate on documents.

- Install Odoo *Notes*.

- Customize your ToDo stages: add a stage and drag it to the right place.

- Create a note and share it with your colleague. Add a tag to categorize it and put the note in a different stage.

- Each follower is able to open the note from the Followers notification email.

Note:

- ***Kanban view****: shows the different stages of business processes (opportunities, projects, notes, etc.) Allows to create new stages and to drag objects from one stage to another.*

Tip:

- **Etherpad**: *you can activate Etherpad for Notes (http://etherpad.org) in your General Settings. This incredible and simple tool will replace the default note layout. Make sure to add the Etherpad API settings to your Company form. Thanks to Etherpad Notes you will be able to:*
  - *Easily structure the content with a simple text edition bar;*
  - *Recognize contributions of other attendees thanks to colors;*
  - *Follow the note evolution thanks to the timeline;*
  - *Share notes with external people, who do not have access to your Odoo interface.*