

TechFinna Looker Sales Dashboard - Installation & Setup Guide

1. Requirements:

- Must have Techfinna Odoo-looker connector.

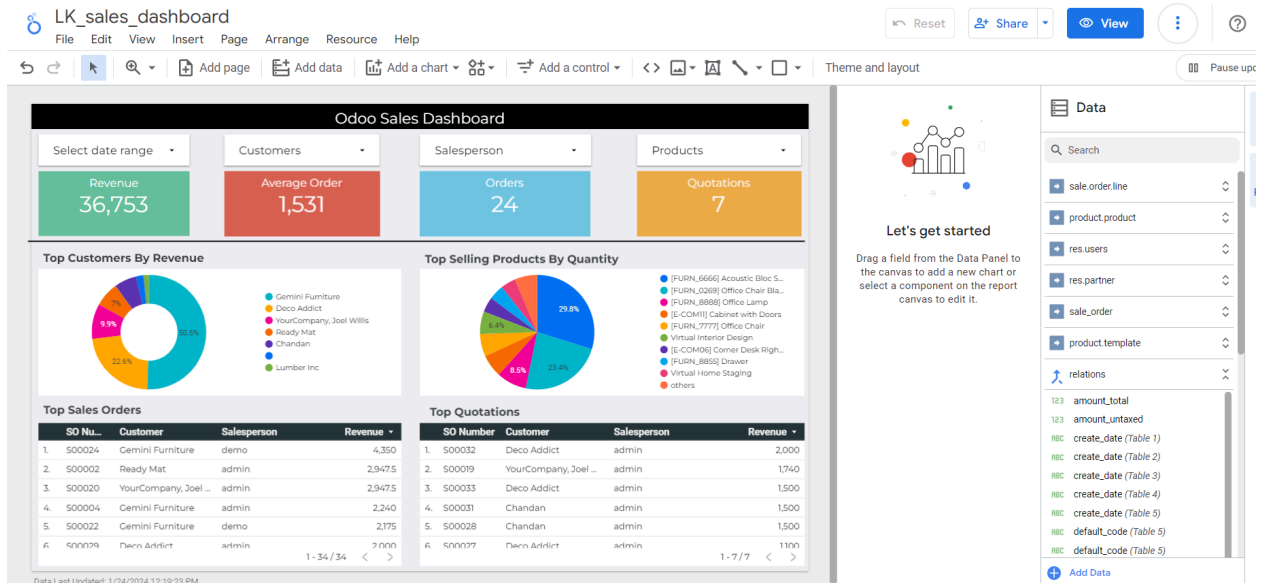
Connector URL- https://apps.odoo.com/apps/modules/17.0/looker_connector/

Dashboard Live URL-

<https://lookerstudio.google.com/reporting/5056df01-50e9-49f3-977c-c0531387bcd4>

2. Set-up:

- Open the dashboard by the provided link and make a copy for yourself to work on -



- Now on the Resources tab here, you will find managed data sources.
- Here you can see all tables and data sources.

LK_sales_dashboard

File

Edit

View

Insert

Page

Arrange

Resource

Help

Reset

Share

View

Data sources

Name	Connector Type	Type	Used in report	Status	Actions
<div>sale.order.line</div>	Apps Script Addon	Reusable	20 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div>
<div>product.product</div>	Apps Script Addon	Reusable	11 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div>
<div>res.users</div>	Apps Script Addon	Reusable	11 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div>
<div>res.partner</div>	Apps Script Addon	Reusable	11 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div>
<div>sale_order</div>	Apps Script Addon	Reusable	11 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div>
<div>product.template</div>	Apps Script Addon	Embedded	0 charts	Working	<div>EDIT</div> <div>DUPLICATE</div> <div>REMOVE</div> <div>MAKE REUSABLE</div>
<div>ADD A DATA SOURCE</div>					

- Go to the edit button in the Actions tab then tab on edit connection, here you will find the Techfinna-Odoo linker connector.
- Here, enter your URL and token from the Odoo Linker connector, which is inside your Odoo settings.
- Now tab on reconnect, and you can find your odoo data for this table.
- Do these steps for all tables, and then you will find the dashboard according to your odoo data.

LK_sales_dashboard
File Edit View Insert Page Arrange Resource Help

Reset Share View

← sale.order.line CANCEL RECONNECT

Odoo
By TechFinna

Looker Studio Community Connector for Odoo, a powerful tool designed to seamlessly integrate Odoo's data with Looker's advanced analytics capabilities. Odoo users can now effortlessly connect their data to Looker's intuitive and customizable analytics platform. Gain valuable insights and make informed decisions with customizable dashboards and reports. This integration enables businesses to explore, analyze, and visualize their Odoo data in a user-friendly and interactive manner. Visit <https://techfinna.com> for more information.

It is your responsibility to review and comply with all applicable third party TOS.

Attention: This connector has not been verified or reviewed. It is recommended that you only use community connectors from trusted sources.

[LEARN MORE](#) [REPORT AN ISSUE](#)

Enter Base URL

Enter the TOKEN provided by

Select Table

sale.order.line

3. New Data source & Blends-

- You can edit existing data sources and add new data sources by using the resource section.

Sales_DB
File Edit View Insert Page Arrange Resource Help

Reset Share View

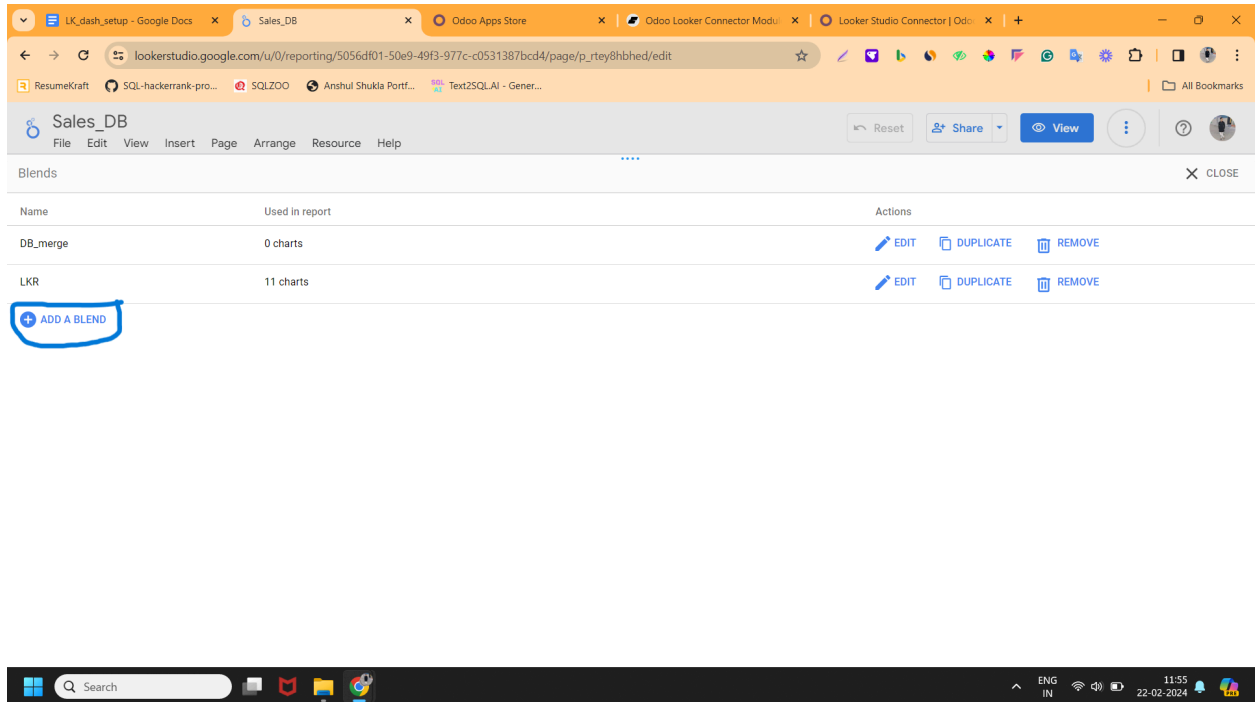
DATA SOURCES CLOSE

Name	Connector Type	Type	Used in report	Status	Actions	Alias
sale_order	Apps Script Addon	Reusable	44 charts	Working	EDIT DUPLICATE REMOVE	ds0
product_product	Apps Script Addon	Embedded	0 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds38
res_partner	Apps Script Addon	Embedded	44 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds4
res_user	Apps Script Addon	Embedded	44 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds5
product_template	Apps Script Addon	Embedded	0 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds39
product_product	Apps Script Addon	Embedded	11 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds6
sale_order_line	Apps Script Addon	Embedded	44 charts	Working	EDIT DUPLICATE REMOVE MAKE REUSABLE	ds7

ADD A DATA SOURCE

Windows Search ENG IN 11:54 22-02-2024

- You can edit existing data blends and add new data blend by using the resource section.



4. Data Refresh-

Schedule Refresh-

Set data freshness for a data source

Looker Studio automatically refreshes all the cached data for each data source used by your report at certain intervals. To change the default data refresh rate:

1. Edit the data source. You can do this from within a report or from the Data Sources home page.
2. At the top, click Data freshness.
3. Under Check for fresh data, select a new refresh option, if available.
4. Click Set Data Freshness.

LK_sales_dashboard

File Edit View Insert Page Arrange Resource Help

← sale.order.line Scope: Reusable Data credentials: SHUBHAM MALVIY Data freshness: 12 hours Community visualizations access: On Field editing in reports: On DONE

← EDIT CONNECTION | FILTER BY EMAIL + ADD A FIELD + ADD A PARAMETER

Field	Type	Default Aggregation	Description
DIMENSIONS (42)			
analytic_distribution	ABC Text	None	The analytic_distribution
company_id	123 Number	None	The company_id
create_date	ABC Text	None	The create_date
create_uid	123 Number	None	The create_uid
currency_id	123 Number	None	The currency_id
customer_lead	123 Number	None	The customer_lead
discount	123 Number	None	The discount
display_type	ABC Text	None	The display_type
id	123 Number	None	The id
invoice_status	ABC Text	None	The invoice_status
is_downpayment	x Boolean	None	The is_downpayment
is_expense	x Boolean	None	The is_expense
margin	123 Number	None	The margin

REFRESH FIELDS 42 / 42 Fields

Manual refresh-

- If you want your data up to date, we will find data refresh at the top right corner.
- Tab on data refresh, and you will find your data updated every time.

LK_sales_dashboard

File Edit View Insert Page Arrange Resource Help

Reset Share View

Refresh data Make a copy

Let's get started

Drag a field from the Data Panel to the canvas to add a new chart or select a component on the report canvas to edit it.

Odoo Sales Dashboard

Select date range Customers Salesperson Products

Revenue 36,753 Average Order 1,531 Orders 24 Quotations 7

Top Customers By Revenue

Top Selling Products By Quantity

Top Sales Orders

Top Quotations

Data Last Updated: 1/24/2024 12:19:23 PM

relations

123 amount_total

123 amount_untaxed

123 create_date (Table 1)

123 create_date (Table 2)

123 create_date (Table 3)

123 create_date (Table 4)

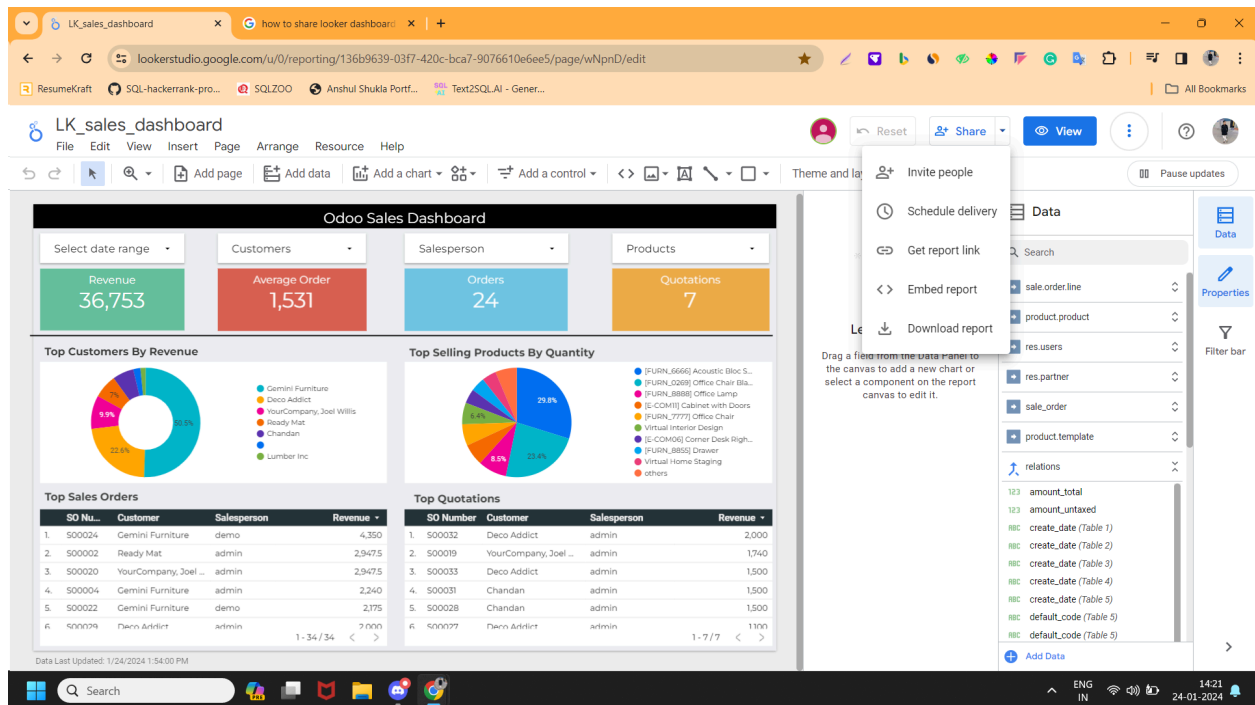
123 create_date (Table 5)

123 default_code (Table 5)

Add Data

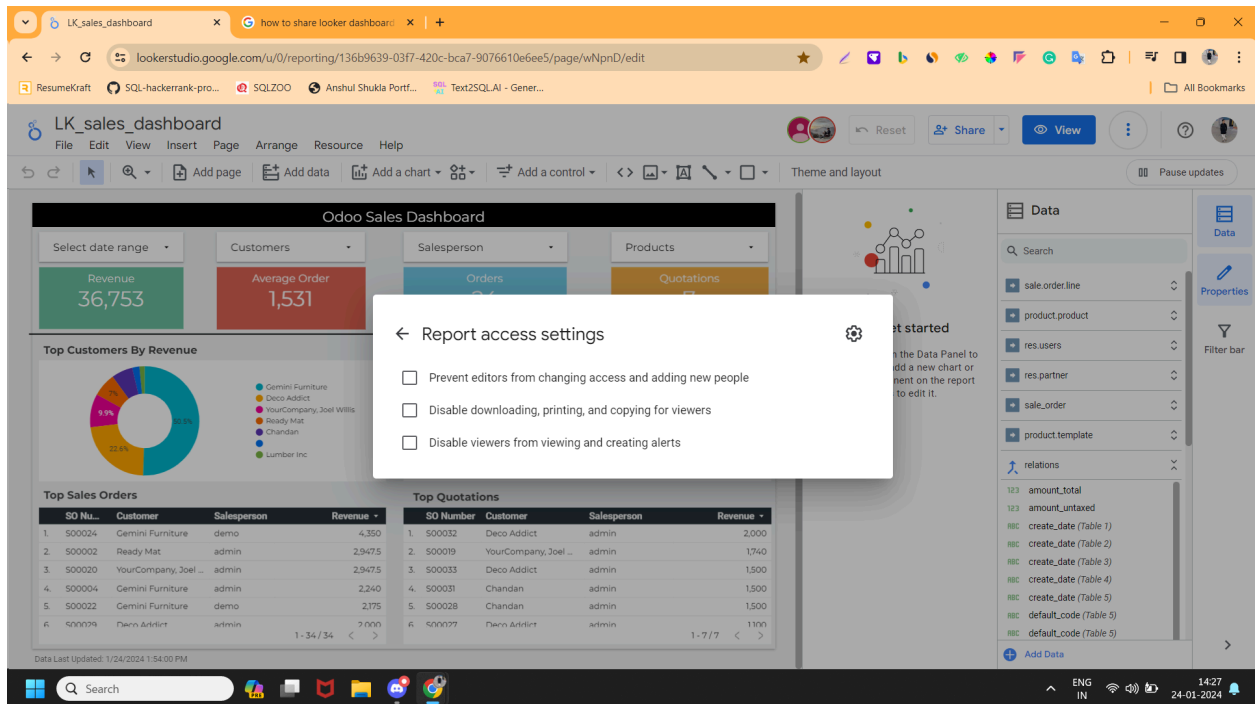
4. Share and Embed Report-

- Click the Share or Invite people button in the top right corner.
- Enter the email addresses of the users you want to share the report with.
- Select a viewer or editor role.
- Send the invitation to view or edit.



You can also share a Looker Studio report by:

- Sharing it with your organization
- Sharing it through its URL
- Making it public
- Embedding your reports on a website
- You can add report access settings by clicking these three options below.



You can also schedule email delivery for your report. You can choose to receive the email weekly, monthly, every weekday, or custom.

Check our Best Odoo Apps at :

<https://apps.odoo.com/apps/modules/browse?author=TechFinna>

For Analytics solutions and Odoo Customization reach us directly at

info@techfinna.com

or

WhatsApp - +916230927667

