Synodica Solutions Pvt. Ltd.
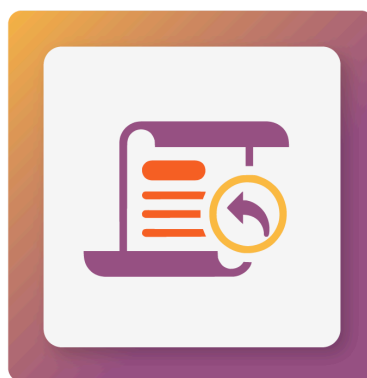
Auto Export To Excel By Schedule User Manual

Control Level : Confidential

Email : info@synodica.com

Phone: +91 88 666 111 30

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1.Project Overview

Module Name: Auto Export Data
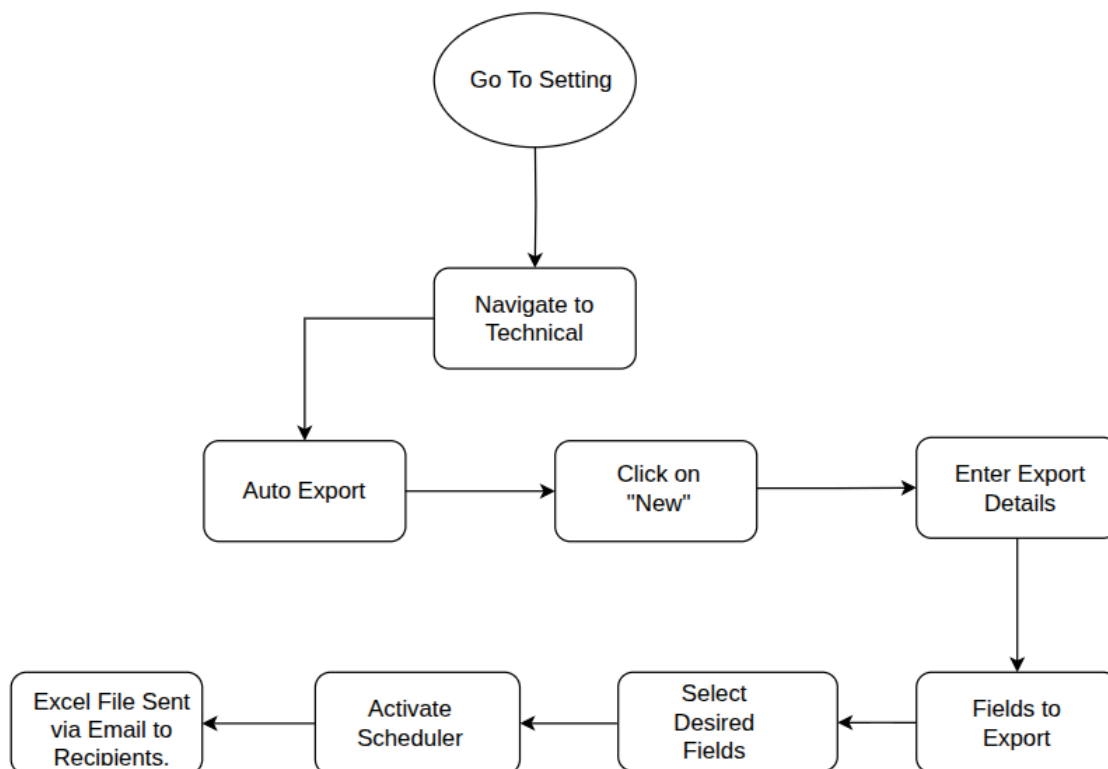
Technical Name: auto_export_data

Version: 18.0

Purpose: The Auto Export Data module is designed to simplify and automate the process of exporting data from Odoo. It empowers users to configure scheduled exports for any Odoo model with ease, choose specific fields, and automatically send structured Excel reports to designated recipients via email. This ensures timely data delivery, reduces manual effort, and enhances secure information sharing — even with users who don't have direct access to the system.

2. Functional Summary

Feature	Description
Flexible Export Configuration	Define Export Name, select Model, set Recipients, choose Interval Type (Daily, Weekly, Monthly), and assign an Email Template.
Automated Email Delivery	Exported Excel files are automatically emailed to the configured recipients as attachments.
User-Friendly Interface:	Clean UI allows even non-technical users to configure and manage exports with minimal effort.
Scheduled Auto Exports (Cron-Based)	Automatically export data at Daily, Weekly, or Monthly intervals using Odoo's built-in scheduler — no manual trigger needed.
Dynamic Field Selection	Select exactly which fields you want to include in the export with a user-friendly UI.
Access-Independent Exporting	Users without access rights to specific models or records can still receive exported data via email, ensuring secure and controlled data sharing.

![Synodica logo]

3. Workflow Diagram

4. How to Use (Step-by-Step)

Step 1: Configure Auto Export

1. Go to **Settings → Technical → Auto Export**.
2. Click the **"New"** button to create a new export configuration.

3. Fill in the required fields:

    ○ **Export Name**
    ○ **Model** (e.g., `Sales`, `Invoice`, `Stock`)
    ○ **Recipients** (e.g., `user@example.com`)
    ○ **Interval Type** (`Daily`, `Weekly`, or `Monthly`)

4. Toggle **Active** to enable the export rule.

5. Choose **Fields to Export** by clicking the **"Fields to Export"** button:

    ● Select the fields from the available list on the left.

    ● Add them to the right side to include them in the export.

    ● Click **"Export"** when done.

Step 2: Activate Scheduler

1. After setting everything, click on the **"Activate Scheduler"** button.

2. This schedules the export using Odoo's built-in **cron job** system.

3. The system will automatically execute the export at the specified interval.

Step 3: Automatic Email Delivery

1. When the cron job runs:

    ○ The selected data is exported as a **.xlsx Excel file**.

    ○ The file is attached to the configured **email template**.

    ○ The email is sent to the specified **recipients** automatically.

2. You do not need to manually trigger the process — the export is fully automated.