

GRADUATION PROJECT PRESENTATION

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Introduction

Odoo 17's Sales module is a powerful tool for managing sales processes, from quote creation to invoicing. It offers features like client management, sales team organization, and subscription management, streamlining workflow and improving efficiency. Odoo 17's fast processing speed and continuous updates ensure optimal performance. ▶

The product is obviously a crucial element in any type of business. No matter if it is a consumable product or a service product.

Odoo provides a specific platform for keeping track of all pertinent information about product management and to ensure that important data about the products that are set up in the system for sales operations is tracked. You can find relevant tabs to record accounting, purchasing, inventory, eCommerce, and many other types of data linked to product management operations in each product configuration window.

The product management window's Kanban view is shown in the screenshot that follows.

The screenshot displays the Odoo Product Management interface in Kanban view. The top navigation bar includes tabs for Sales, Orders, To Invoice, Products, Reporting, and Configuration. The 'Products' tab is active. On the right, there are notification icons (5 and 23), the company name 'Demo Company', and a user profile icon. Below the navigation bar, there is a 'New Products' button and a search bar with a filter 'Can be Sold' and a search input field. The main area shows a grid of product cards, each with a product image, name, ID, price, and stock status. Each card also has a star icon for favorites.

Product Name	ID	Price	On hand
Acoustic Bloc Screens	[FURN_6666]	\$ 295.00	16.00 Units
Bacon Burger		\$ 7.50	
Bolt	[CONS_89957]	\$ 0.50	
Cabinet with Doors	[E-COM11]	\$ 140.00	33.00 Units
Cable Management Box	[FURN_5555]	\$ 100.00	90.00 Units
Car Leasing (SUB)		\$ 200.00	
Chair floor protection		\$ 12.00	
Cheese Burger		\$ 7.00	
Chicken Curry Sandwich		\$ 3.00	

In the Product Name column, the product's name may be mentioned. If you want to sell this product, you can select the Can be Sold option. This product can be set up to be purchased by using the Can be Purchased option. By using the Can be Expensed option, the product can be chosen at a cost. By choosing the Recurring option while confirming a sales order for this product, a subscription will be created. By selecting the Can be Rented option in Odoo , you can rent the item.

New

Products

New ⚙️ 📁 ↺

☰ Extra Prices 0

🔗 Go to Website

↔ In: 0 Out: 0

More ▾

🔖

Product Name

☆ e.g. Cheese Burger

☒ Can be Sold ☒ Can be Purchased ☐ Can be Expensed ? ☐ Recurring ? ☐ Can be Rented ?

General Information

Attributes & Variants

Sales

Purchase

Inventory

Accounting

Product Type ?

Consumable

Product Type ?

Consumables are physical products for which you don't manage the inventory level: they are always available.

You can invoice them before they are delivered.

Unit of Measure ?

Units

Sales Price ?

\$1.00

(= \$ 1.15 Incl. Taxes)

Invoicing Policy ?

Ordered quantities

Create on Order ?

Nothing

Customer Taxes ?

15% ×

Cost ?

0.00

per Units

Product Category

All

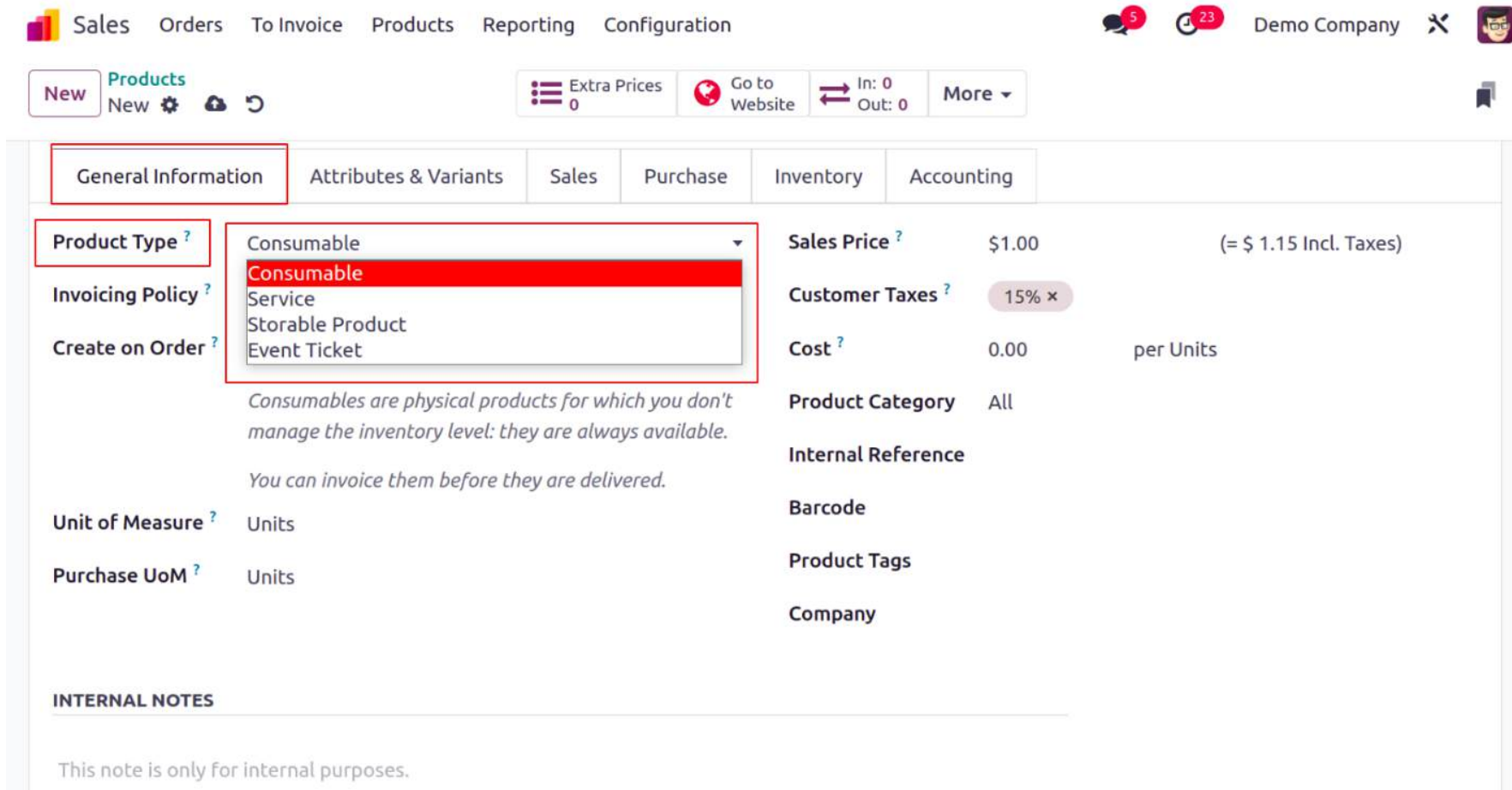
Internal Reference

Barcode

Product Tags

The general information about the product is mentioned on the General Information tab

Odoo product types include Consumable, Service, Storable Products, Event Tickets, Courses, and Event Booths. Odoo invoicing policies can be set for each product type. You can invoice based on ordered quantities or delivered quantities



Sales Orders To Invoice Products Reporting Configuration

New Products New

Extra Prices 0 Go to Website In: 0 Out: 0 More

General Information Attributes & Variants Sales Purchase Inventory Accounting

Product Type ? Consumable
Consumable
Service
Storable Product
Event Ticket

Invoicing Policy ?

Create on Order ?

Consumables are physical products for which you don't manage the inventory level: they are always available.
You can invoice them before they are delivered.

Unit of Measure ? Units

Purchase UoM ? Units

Sales Price ? \$1.00 (= \$ 1.15 Incl. Taxes)

Customer Taxes ? 15% x

Cost ? 0.00 per Units

Product Category All

Internal Reference

Barcode

Product Tags

Company

INTERNAL NOTES

This note is only for internal purposes.

In the Unit of Measure section, set a default UoM for stock activities and specify a Purchase UoM, which must match the standard UoM class. You can also enter details like Cost, Product Category, Internal Reference, Barcode, Product Tags, and Company information.

New

Products

New

Extra Prices

0

Go to Website

In: 0

Out: 0

More

General Information	Attributes & Variants	Sales	Purchase	Inventory	Accounting
Product Type ?	Consumable	Sales Price ?	\$1.00	(= \$ 1.15 Incl. Taxes)	
Invoicing Policy ?	Ordered quantities	Customer Taxes ?	15% x		
Create on Order ?	Ordered quantities	Cost ?	0.00	per Units	
	Delivered quantities	Product Category	All		
	Consumables are physical products for which you don't manage the inventory level: they are always available.	Internal Reference			
	You can invoice them before they are delivered.	Barcode			
Unit of Measure ?	Units	Product Tags			
Purchase UoM ?	Units	Company			

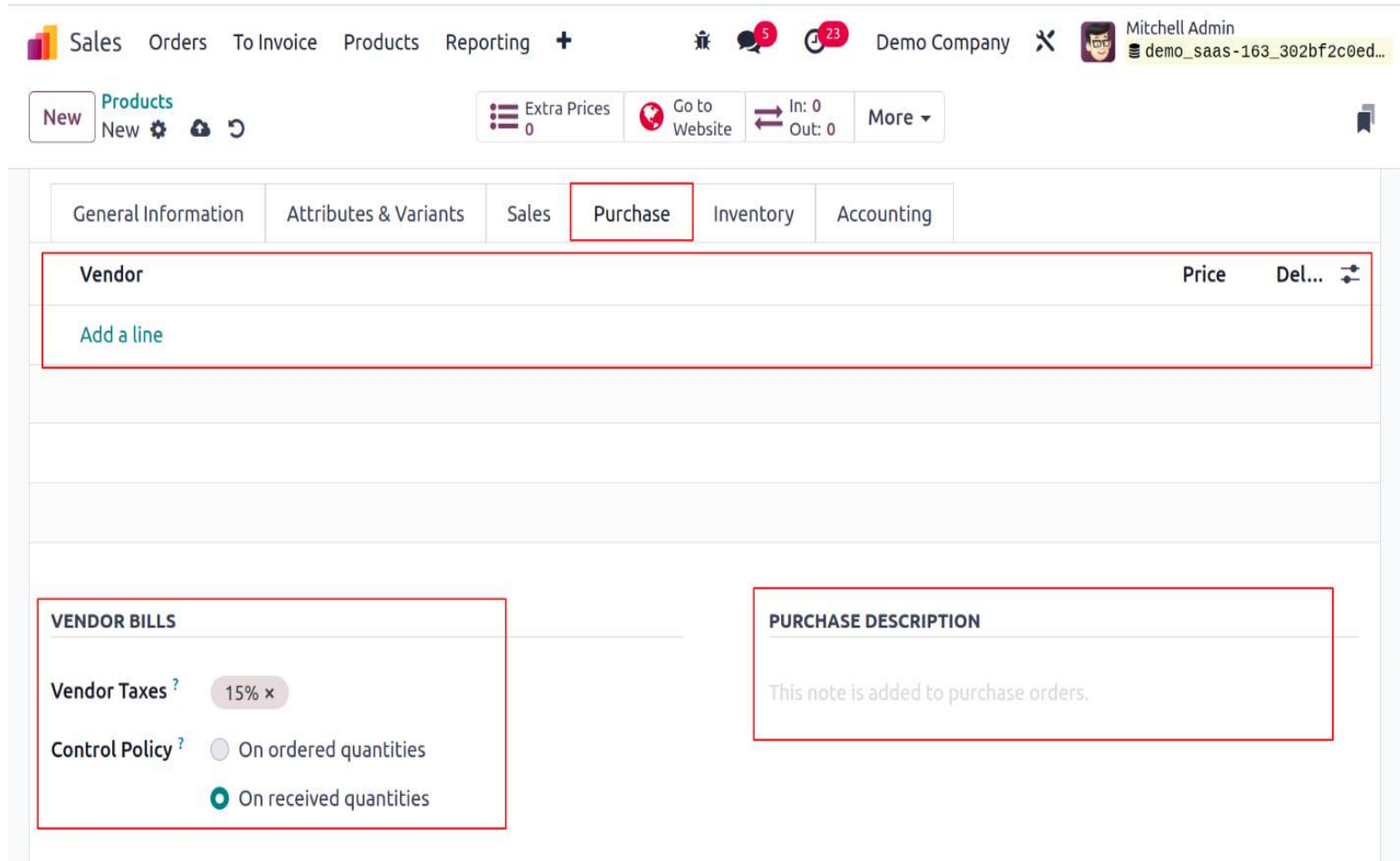
INTERNAL NOTES

Under the Attributes & Variants tab, list product variations. In the Sales tab, set up sales info, point of sale, eCommerce, and upselling/cross-selling options like Optional, Accessory, and Alternative Products.

The screenshot shows the 'Attributes & Variants' tab of a product management interface. At the top, there's a navigation bar with tabs: Sales, Orders, To Invoice, Products, Reporting, and Configuration. Below this, a sub-navigation bar includes 'New', 'Products', and 'New' with a gear icon. A toolbar contains icons for 'Extra Prices', 'Go to Website', 'In: 0 Out: 0', 'Bill of Materials', and a 'More' dropdown. The main content area has 'Replenish' and 'Print Labels' buttons. The 'Product Name' field is labeled 'e.g. Cheese Burger' with a star icon and a camera icon. Below the name are checkboxes for 'Can be Sold', 'Can be Purchased', 'Can be Expensed', 'Recurring', and 'Can be Rented'. A tabbed interface shows 'General Information', 'Attributes & Variants' (highlighted with a red box), 'Sales', 'Purchase', 'Inventory', and 'Accounting'. The 'Attributes & Variants' section has a table with columns 'Attribute' and 'Values', and an 'Add a line' link.

The screenshot shows the 'Sales' tab of the same product management interface. The navigation bar and sub-navigation bar are identical to the previous screenshot. The toolbar is also the same. The main content area has tabs: 'General Information', 'Attributes & Variants', 'Sales' (highlighted with a red box), 'Purchase', 'Inventory', and 'Accounting'. The 'Sales' section is divided into three main areas: 'UPSELL & CROSS-SELL', 'POINT OF SALE', and 'EXTRA PRODUCT MEDIA'. The 'UPSELL & CROSS-SELL' section has three options: 'Optional Products' (Recommend when 'Adding to Cart' or quotation), 'Accessory Products' (Suggested accessories in the eCommerce cart), and 'Alternative Products' (Displayed in bottom of product pages). The 'POINT OF SALE' section has a checkbox for 'Available in POS'. The 'EXTRA PRODUCT MEDIA' section has an 'Add a Media' button. The 'ECOMMERCE SHOP' section has fields for 'Website' and 'Categories'.

The Purchase tab can be used to define the purchase-related details when configuring a product that can be purchased.



The screenshot displays the 'Purchase' tab within the Odoo product configuration interface. The top navigation bar includes links for Sales, Orders, To Invoice, Products, and Reporting, along with a user profile for Mitchell Admin. The 'Purchase' tab is highlighted in the sub-navigation bar. Below the navigation, a table for purchase lines is visible, with a red box highlighting the 'Vendor' column and an 'Add a line' button. At the bottom, two sections are highlighted with red boxes: 'VENDOR BILLS' and 'PURCHASE DESCRIPTION'. The 'VENDOR BILLS' section shows 'Vendor Taxes' set to 15% and 'Control Policy' set to 'On received quantities'. The 'PURCHASE DESCRIPTION' section contains a text area with the placeholder text 'This note is added to purchase orders.'

Sales Orders To Invoice Products Reporting + Demo Company Mitchell Admin demo_saas-163_302bf2c0ed...

New Products New

Extra Prices 0 Go to Website In: 0 Out: 0 More

General Information Attributes & Variants Sales **Purchase** Inventory Accounting

Vendor	Price	Del...
Add a line		

VENDOR BILLS

Vendor Taxes? 15% x

Control Policy? ☐ On ordered quantities ☒ On received quantities

PURCHASE DESCRIPTION

This note is added to purchase orders.

In the Inventory tab, manage product inventory and select operation routes based on installed modules. Assign a responsible user for logistics, and specify the product's weight and volume.

The screenshot displays the Odoo Inventory management interface. At the top, a navigation bar includes tabs for Sales, Orders, To Invoice, Products, and Reporting. The 'Products' tab is active, showing a 'New' button and various utility icons. Below this, a horizontal menu contains 'General Information', 'Attributes & Variants', 'Sales', 'Purchase', 'Inventory' (highlighted with a red box), and 'Accounting'. The 'Inventory' section is divided into two main panels: 'OPERATIONS' and 'LOGISTICS'. The 'OPERATIONS' panel, also highlighted with a red box, contains a 'Routes' section with a checked 'Buy' option and an unchecked 'Manufacture' option, along with a 'View Diagram' link. The 'LOGISTICS' panel, also highlighted with a red box, contains fields for 'Responsible' (assigned to Mitchell Admin), 'Weight' (0.00 kg), 'Volume' (0.00 m³), 'Customer Lead Time' (0.00 days), 'HS Code', and 'Origin of Goods'. At the bottom, the 'COUNTERPART LOCATIONS' section shows the 'Production Location' as 'Virtual Locations/Production'.

OPERATIONS

Routes ? ☒ Buy
☐ Manufacture
[→ View Diagram](#)

LOGISTICS

Responsible ? Mitchell Admin

Weight ? 0.00 kg

Volume ? 0.00 m³

Customer Lead Time ? 0.00 days

HS Code ?

Origin of Goods ?

COUNTERPART LOCATIONS

Production Location ? Virtual Locations/Production

The Accounting tab tracks financial info. Specify the Income Account in Receivables and the Expense Account in Payables. Price differences between purchase orders and vendor bills are recorded in the Price Difference Account for automatic inventory valuation.

SalesOrdersTo InvoiceProductsReporting+

5

23

Demo Company

Mitchell Admin
demo_saas-163_302bf2c0ed...

New

Products

New

Extra Prices
0

Go to Website

In: 0
Out: 0

More

Product Name?

☆ e.g. Cheese Burger

Can be Sold?

Can be Purchased?

Can be Expensed?

Recurring?

Can be Rented?

General Information

Attributes & Variants

Sales

Purchase

Inventory

Accounting

eBay

RECEIVABLES

Income Account?

400000 Product Sales

INTRASTAT

Commodity Code?

PAYABLES

Expense Account?

600000 Expenses

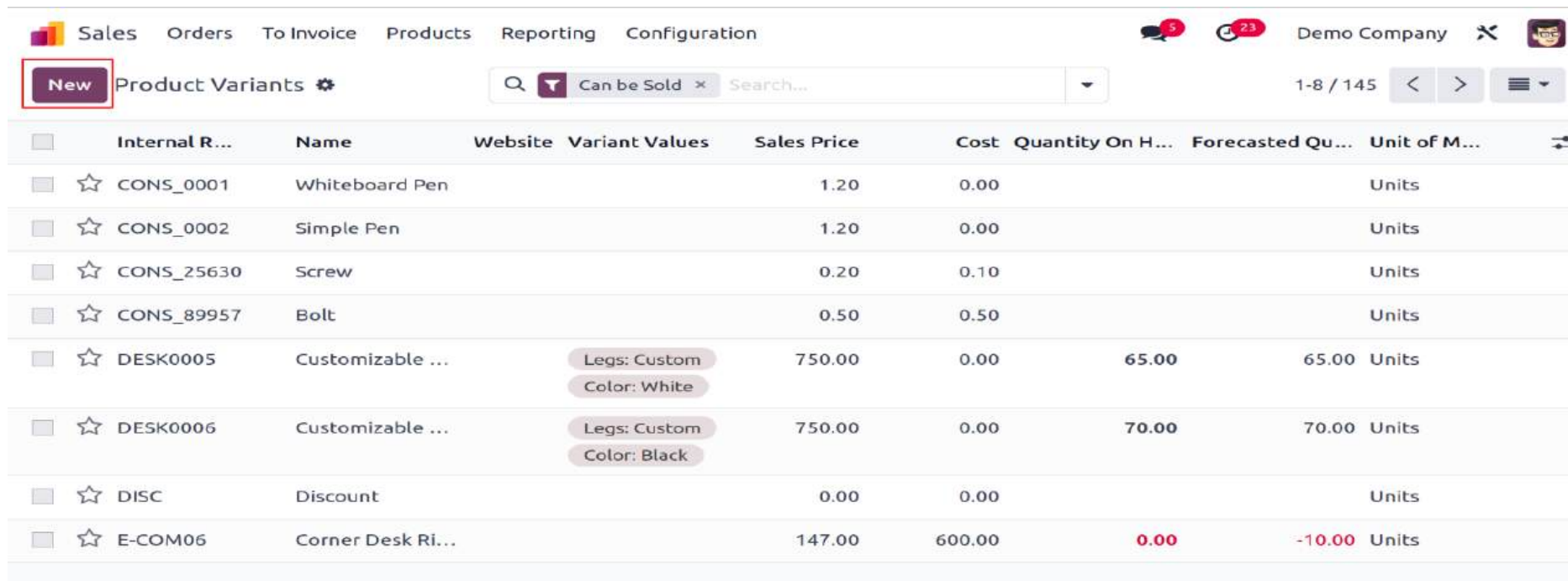
Price Difference Account?

AUTOMATIC EMAIL AT INVOICE

Email Template?

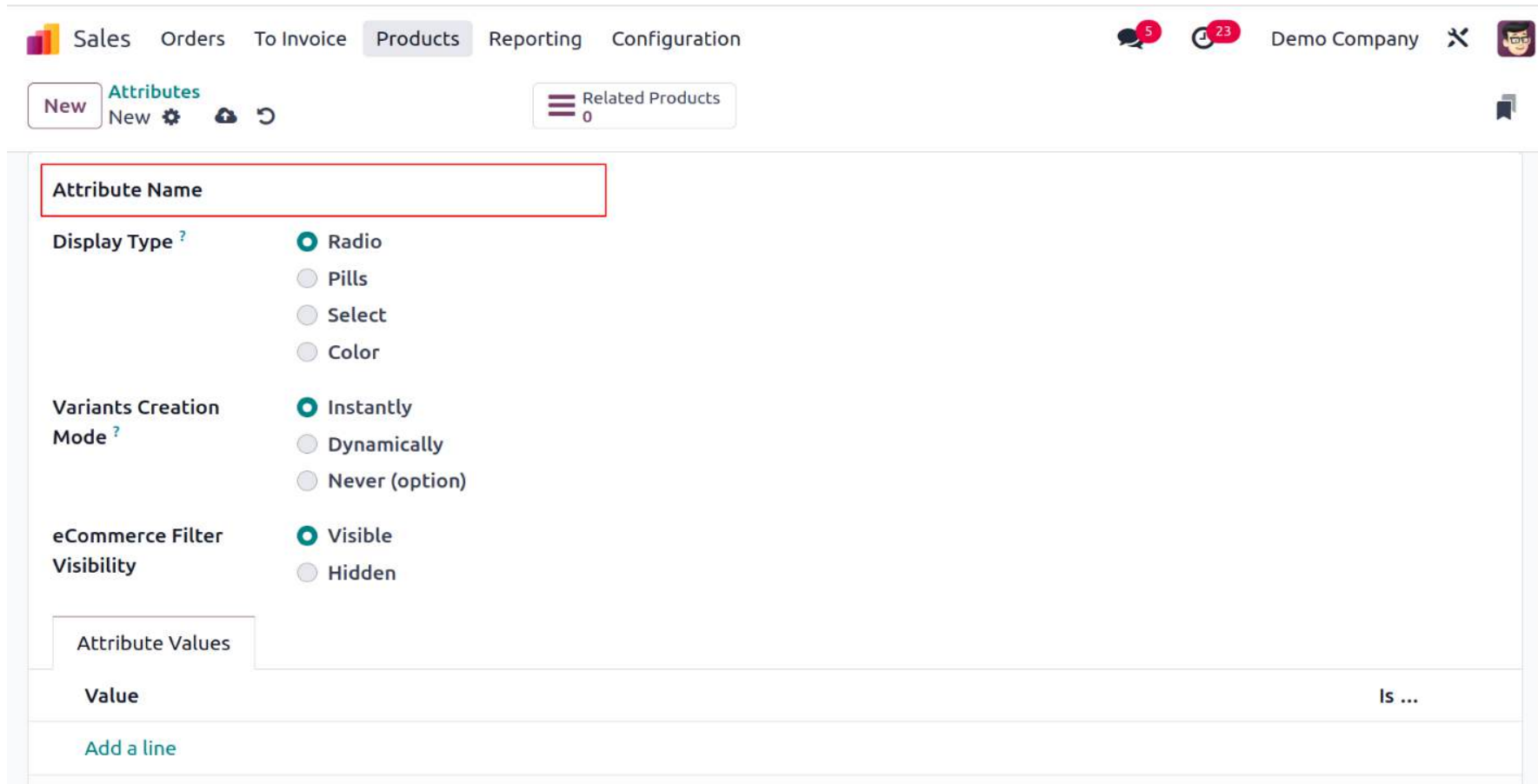
In Odoo 17, enable product variants in the Sales module from the Settings menu under the Product Catalog tab. Once activated, you can use attributes to offer different versions of a product. Use the Product Variants option under the Products menu to configure new product versions .

A list of already configured Product variants is available. You can quickly add a new one by using the NEW button.



Sales Orders To Invoice Products Reporting Configuration									
New Product Variants									
Can be Sold Search...									
1-8 / 145									
Internal R...	Name	Website	Variant Values	Sales Price	Cost	Quantity On H...	Forecasted Qu...	Unit of M...	
CONS_0001	Whiteboard Pen			1.20	0.00			Units	
CONS_0002	Simple Pen			1.20	0.00			Units	
CONS_25630	Screw			0.20	0.10			Units	
CONS_89957	Bolt			0.50	0.50			Units	
DESK0005	Customizable ...		Legs: Custom Color: White	750.00	0.00	65.00	65.00	Units	
DESK0006	Customizable ...		Legs: Custom Color: Black	750.00	0.00	70.00	70.00	Units	
DISC	Discount			0.00	0.00			Units	
E-COM06	Corner Desk Ri...			147.00	600.00	0.00	-10.00	Units	

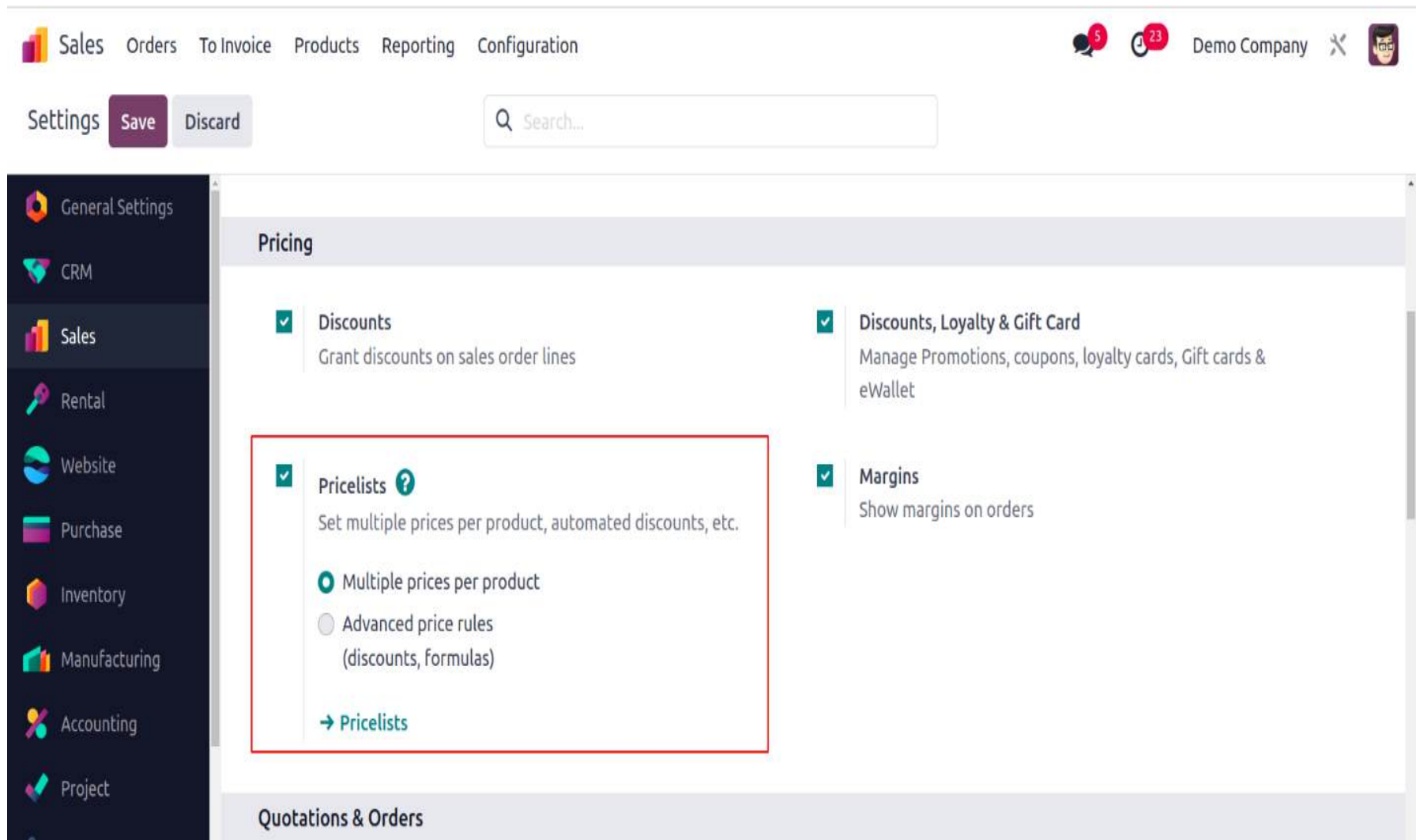
Customize product attributes to define versions by selecting the ****Attributes**** option from the ****Configuration**** menu. You can enter the name of the attribute in the Attribute Name field. Create a category to group comparable attributes into one area on the eCommerce comparison page.



The screenshot shows a software interface for configuring product attributes. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice, Products (selected), Reporting, and Configuration. On the right of the navigation bar, there are notification icons (5 and 23), the text 'Demo Company', and a user profile icon. Below the navigation bar, there is a 'New' button and a section titled 'Attributes' with a 'New' button, a settings gear icon, a cloud icon, and a refresh icon. To the right of this section is a 'Related Products' button showing '0'. The main content area is titled 'Attribute Name' and contains three sections: 'Display Type' with radio buttons for 'Radio' (selected), 'Pills', 'Select', and 'Color'; 'Variants Creation Mode' with radio buttons for 'Instantly' (selected), 'Dynamically', and 'Never (option)'; and 'eCommerce Filter Visibility' with radio buttons for 'Visible' (selected) and 'Hidden'. Below these sections is a table with the header 'Attribute Values' and a sub-header 'Value'. The table has a column 'Is ...' and a row 'Add a line'.

Attribute Name
Display Type ?
<input checked="" type="radio"/> Radio
<input type="radio"/> Pills
<input type="radio"/> Select
<input type="radio"/> Color
Variants Creation Mode ?
<input checked="" type="radio"/> Instantly
<input type="radio"/> Dynamically
<input type="radio"/> Never (option)
eCommerce Filter Visibility
<input checked="" type="radio"/> Visible
<input type="radio"/> Hidden
Attribute Values
Value
Is ...
Add a line

Odoo 17 offers advanced pricing options for your company's strategy, allowing you to create tailored price lists for specific clients. To set up new price lists in the Sales module, simply activate the Price Lists feature in the Pricing tab under the Settings menu.



In Odoo 17, users can create two types of price lists:

- Multiple Prices per Product .
- Advanced Price Rules (discounts, formulas) .

After enabling the Pricelist feature, access it via the Products menu.

The screenshot displays the Odoo 17 web interface. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products' (highlighted with a red box), 'Reporting', and 'Configuration'. A dropdown menu for 'Products' is open, showing 'Products', 'Product Variants', 'Pricelists' (highlighted with a red box), 'Discount & Loyalty', and 'Gift cards & eWallet'. The main dashboard area contains four cards: 'Company Data' (Let's start!), 'Quotation Layout' (Customize), 'Order Confirmation' (Set payments), and 'Sample Quotation' (Send sample). Below the dashboard is a table of sales orders.

<input type="checkbox"/>	Number	Creation Date	Customer	Website	Salesperson	Activities	Company	Total	Status
<input type="checkbox"/>	S00061	08/16/2023 06:38:36	Deco Addict		Mitchell Admin		Demo Company	\$ 1,552.50	Sales Order
<input type="checkbox"/>	S00060	08/16/2023 06:38:36	Deco Addict		Mitchell Admin		Demo Company	\$ 690.00	Sales Order
<input type="checkbox"/>	S00058	08/16/2023 06:38:36	Gemini Furniture		Mitchell Admin		Demo Company	\$ 8,914.80	Sales Order
<input type="checkbox"/>	S00057	08/16/2023 06:38:36	Gemini Furniture		Mitchell Admin		Demo Company	\$ 20,182.50	Sales Order
								\$ 31,339.80	

Advanced Price Rules

To create an advanced price list in Odoo 17, enable the Pricelist feature from the Settings menu. Then, access the Pricelist option under the Products menu and click "New." In the setup window, you can name the price list, select the currency, and enter your company name. The setup window includes three tabs for additional price list details.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewPricelists

New⚙️🔒🔄

e.g. USD Retailers

CurrencyUSD

Company

Price RulesTime-based rulesConfiguration

Applicable On	Min. ...	Price	Start Date	End Date
Add a line				

Using the "Add a Line" option in the Price Rules menu, you can create new price rules for products. Select from three price computation methods: Fixed Price, Discount, or Formula. Based on your selection, additional fields will appear for further details.

For example, selecting Fixed Price will prompt you to enter the price. You can apply the rule to All Products, a Product Category, a specific Product, or a Product Variant using the "Apply On" field.

Create Pricelist Rules

PRICE COMPUTATION

Computation ☒ Fixed Price
☐ Discount
☐ Formula

Fixed Price 0.00

CONDITIONS

Apply On ☒ All Products
☐ Product Category
☐ Product
☐ Product Variant

Min. Quantity 0.00

Validity

The computed price is expressed in the default Unit of Measure of the product.

Save & Close Save & New Discard

In the Time-based rules tab, you can set recurring price rules by clicking "Add a Line" to select the product and its variants. Use the Period box to set the minimum time before the rule applies, and choose the time unit (hours, days, weeks, months, or years). Once a product is selected, the price will automatically appear in the designated field.

Sales Orders To Invoice Products Reporting Configuration

5

23

Demo Company

Mitchell Admin

demo_saas-163_9a372ac608...

New Pricelists

New

e.g. USD Retailers

Currency? USD

Company?

Price Rules

Time-based rules

Configuration

Products	Variants	Period	Price
Office Cleaning Service (SUB)		Monthly	\$ 400.00
Add a line			

In the Configuration tab, you can set the Availability for specific Country Groups and choose the Discount Policy: either "Discount included in the price" or "Show public price & discount to the customer."

The screenshot shows the 'Pricelists' configuration interface. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice, Products, Reporting, and Configuration. The 'Configuration' tab is active. Below the navigation bar, there is a header area with 'New Pricelists' and a 'New' button. The main content area is titled 'e.g. USD Retailers' and contains several sections. The 'Configuration' tab is selected, showing the 'Configuration' section. This section includes 'AVAILABILITY' and 'DISCOUNTS'. The 'AVAILABILITY' section has a 'Country Groups' field. The 'DISCOUNTS' section has a 'Discount Policy' field with two options: 'Discount included in the price' (selected) and 'Show public price & discount to the customer'. The 'WEBSITE' section is also visible, containing 'Website', 'Selectable', 'E-commerce', and 'Promotional Code' fields. The 'Website' field is set to 'My Website'.

Sales Orders To Invoice Products Reporting Configuration

New Pricelists New

e.g. USD Retailers

Currency? USD

Company?

Price Rules Time-based rules Configuration

AVAILABILITY

Country Groups?

DISCOUNTS

Discount Policy? ☒ Discount included in the price ☐ Show public price & discount to the customer

WEBSITE

Website? My Website

Selectable? ☐

E-commerce

Promotional Code?

Multiple Prices per Product:

To create different prices for a product, enable the "Multiple Prices per Product" option in the Pricelist settings. The setup is similar to advanced price rules, but in this case, use the "Add a Line" button in the Price Rule tab to add products to the price list.

Sales Orders To Invoice Products Reporting Configuration

5

23

Demo Company

Mitchell Admin
demo_saas-163_9a372ac608...

New

Pricelists

New ⚙️ 🔒 ↺

e.g. USD Retailers

Currency? USD

Company?

Price Rules

Time-based rules

Configuration

Products	Variants	Min. ...	Price	Start Date	End Date
		0.00	0.00		
Add a line					

Customers

In Odoo 17, you can manage customer records through the Customers platform, located under the Orders menu in the Sales module.

The screenshot displays the Odoo 17 interface. The top navigation bar includes 'Sales', 'Orders' (highlighted with a red box), 'To Invoice', 'Products', 'Reporting', and 'Configuration'. A dropdown menu for 'Orders' is open, showing 'Quotations', 'Orders', 'Sales Teams', and 'Customers' (highlighted with a red box). Below the navigation bar is a dashboard with four cards: 'Company Data' (with a 'Let's start!' button), 'Quotation Layout' (with a 'Customize' button), 'Order Confirmation' (with a 'Set payments' button), and 'Sample Quotation' (with a 'Send sample' button). At the bottom is a table of customer records.

<input type="checkbox"/>	Number	Creai...	Custo...	Website	Salesp...	Activities	Comp...	Total	Status
<input type="checkbox"/>	S00061	08/18/2023 06	Deco Addict		Mitch...		Demo Com...	\$ 1,552.50	Sales Order
<input type="checkbox"/>	S00060	08/18/2023 06	Deco Addict		Mitch...		Demo Com...	\$ 690.00	Sales Order

Click the "New" button to create a customer profile by entering the person's or business's name. You can then add details such as address, tax ID, phone, email, website, language, and tags.

Sales Orders To Invoice Products Reporting + Demo Company Mitchell Admin demo_saas-163_4ec9e5c808...

New Customers New Meetings 0 Opportunities 0 Sales 0 More

☐ Individual ☒ Company

e.g. Lumber Inc

Address Street... Street 2... City... State... ZIP... Country... Phone? Mobile? Email? Website? e.g. https://www.odoo.com Tags? e.g. "B2B", "VIP", "Consulting", ...

Tax ID? e.g. BE0477472701

Contacts & Addresses Sales & Purchase Accounting Internal Notes Partner Assignment

Add

In the "Contacts & Addresses" tab, click "Add" to specify the contact type, such as Invoice, Delivery, Private, Other, or Follow Up Address. Then, enter the contact's details like name, address, email, phone, and mobile number.

Create Contact

☐ Contact

☐ Invoice Address

☐ Delivery Address

☐ Private Address

☐ Follow-up Address

☒ Other Address

Other address for the company (e.g. subsidiary, ...)

Contact Name ?

Email ?

Address ?

Street...

Street 2...

City

State

ZIP

Country

Phone ?

Mobile ?

Internal notes...

Save & Close

Save & New

Discard

Under the Sales & Purchase tab, you can configure details for sales and purchase operations with the customer. Assign a Salesperson and Sales Team, set a specific Payment Period for invoices, and provide a unique Price List. Enter the Avalara Code, Partner Code, and Exemption. You can also specify the default Delivery Method for sales orders.

In the Purchase tab, select preferred Payment Terms for vendor bills. Specify the preferred Payment Mode and enable receipt reminders for confirming receipt dates. The Supplier Currency will be used for purchases from the current partner.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewCustomersNew

Meetings0Opportunities0Sales0Subscriptions0More

Avalara Partner Code ?

Avalara Exemption ?

POINT OF SALE

Barcode ?

FISCAL INFORMATION

Fiscal Position ?

MISC

Company ID ?

Reference ?

Company ?

Website ?

Industry ?

SLA Policies ?

INVENTORY

Customer Location ?Partners/Customers

Vendor Location ?Partners/Vendors

For identification at the point of sale, you can assign a Barcode and specify the Fiscal Position under Fiscal Information. Additional details like Company ID, Reference, and Customer Location can be entered under the Miscellaneous tab. The Vendor Location allows you to choose where to receive products from this contact.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewCustomersNew

Meetings0

Opportunities0

Sales0

Subscriptions0

More

Demo Company

Mitchell Admindemo_saas-163_4ec9e5c808...

Avalara Partner Code ?

Avalara Exemption ?

POINT OF SALE

Barcode ?

FISCAL INFORMATION

Fiscal Position ?

MISC

Company ID ?

Reference ?

Company ?

Website ?

Industry ?

SLA Policies ?

INVENTORY

Customer Location ?Partners/Customers

Vendor Location ?Partners/Vendors

Under the Accounting tab, you can define the customer's accounting information. Use the "Add a Line" button to list the customer's bank accounts and account numbers. Specify the Account Receivable and Account Payable under the Accounting Entries field.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewCustomersNew

Meetings0

Opportunities0

Sales0

Subscriptions0

More

Demo Company

Mitchell Admin

Contacts & AddressesSales & PurchaseAccountingInternal NotesPartner Assignment

BANK ACCOUNTS

Account Number	Bank	Se...
Add a line		

ELECTRONIC INVOICING

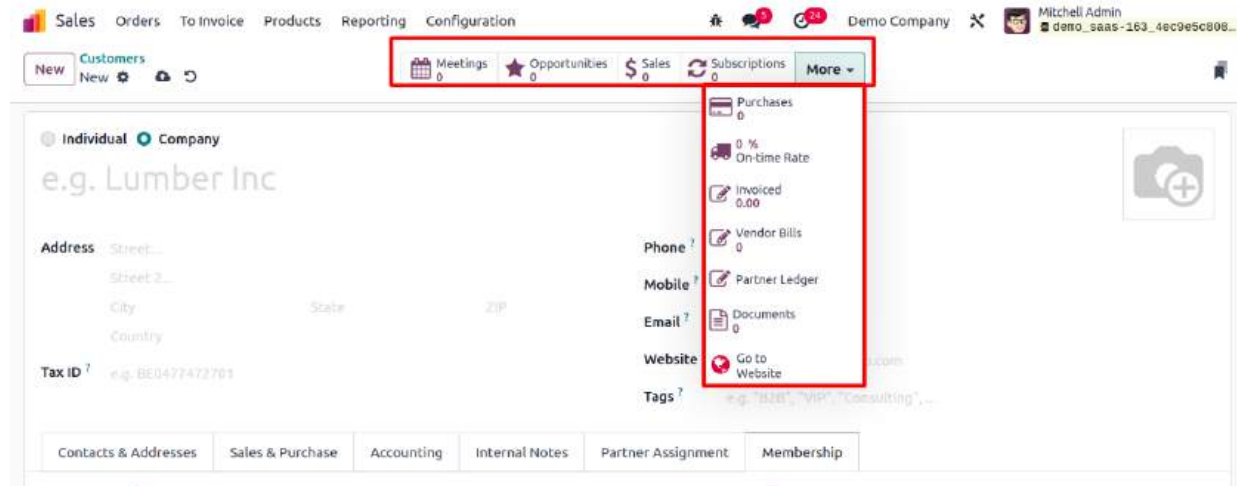
Format?

ACCOUNTING ENTRIES

Account Receivable?	121000 Account Receivable
Account Payable?	211000 Account Payable

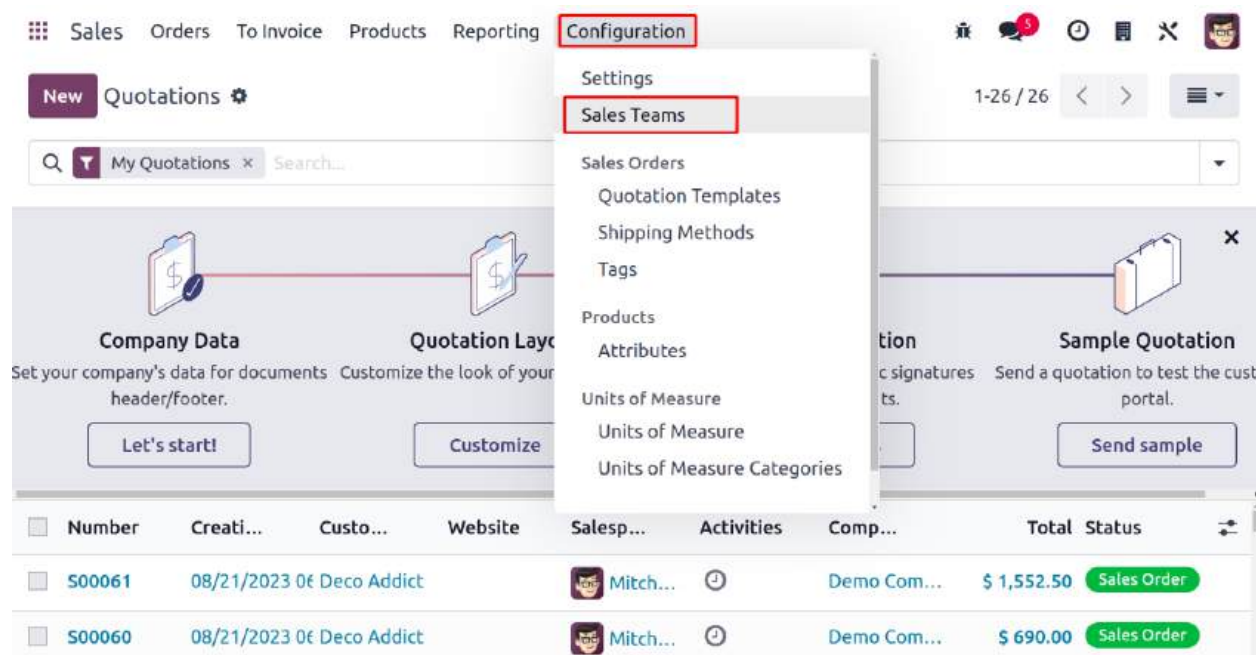
The Associate Member box allows you to link a member to the customer's membership and displays their current membership status. You can purchase a membership using the "Buy Membership" button, which shows details like Join Date, Membership, Price, Invoice, and Status.

Smart buttons provide quick access to operations related to the customer, such as meetings, opportunities, sales, subscriptions, tasks, purchases, invoiced amounts, vendor bills, partner ledger, payment tokens, certifications, documents, direct debit requirements, and course information.



Sales Team

An effective sales team is crucial for managing all sales operations within a company. The Odoo 17 Sales module allows you to create multiple teams to enhance sales efforts. The CRM module also offers configuration options for sales staff. Access the platform to build and manage sales teams by selecting the Sales Teams option under the Configuration menu in the Sales module.



In the new sales team configuration window, enter a team name in the Sales Team section. To provide quotations instead of confirming sales orders, check the Quotations box. Tick the Pipeline box to manage pre-sales opportunities, and check the Leads box to filter incoming inquiries as leads. Designate a Team Leader in the "Team Details" section and configure a custom email alias. In the Accept Emails From section, choose from Everyone, Authenticated Partners, Followers only, or Authenticated Employees. Specify the associated Company and set a monthly revenue target in the invoicing target box

Sales Orders To Invoice Products Reporting Configuration

New Sales Teams New

Sales Team
e.g. North America

TEAM DETAILS

Team Leader

Email Alias ? [→ Configure a custom domain](#)

Accept Emails From ? Everyone

Company Demo Company

Invoicing Target ? \$0.00 / Month

Members

Add

To add team members, click the Add button under the Members tab. A new wizard will appear, allowing you to select team members. Once you add the desired members, the new sales team will be saved in your system.

Add: Salespersons

1 selected

1-3 / 3

<input type="checkbox"/>	Name	Login	Language	Latest authentication	Company	Status
<input checked="" type="checkbox"/>	John doe	demo_en_US	English (US)		Demo Company	Never Connected
<input type="checkbox"/>	Marc Demo	demo	English (US)		Demo Company	Never Connected
<input type="checkbox"/>	Mitchell Admin	admin	English (US)	08/21/2023 15:48:50	Demo Company	Confirmed

Select

New

Close

Sales Quotations

Sales quotations are the starting point for creating sales orders, serving as a contract between the vendor and buyer that outlines the relevant details and pricing of goods. Odoo 17 allows you to easily generate and send quotations to customers, providing them with accurate pricing information before finalizing any sales agreements. If the customer approves the offer, the sales quotation can be converted into a sales order.

You can create and manage quotations under the Orders menu in the Sales module, where you can also access existing sales quotations.

The screenshot displays the Odoo 17 Sales module interface. The top navigation bar includes 'Sales', 'Orders' (highlighted with a red box), 'To Invoice', 'Products', 'Reporting', 'Configuration', and user information. A dropdown menu for 'Orders' is open, showing 'Quotations' (highlighted with a red box), 'Orders', 'Sales Teams', and 'Customers'. Below the navigation bar, there are four main action cards: 'Company Data' (Let's start!), 'Quotation Layout' (Customize), 'Order Confirmation' (Set payments), and 'Sample Quotation' (Send sample). At the bottom, a table lists existing sales quotations.

Number	Creation Date	Customer	Webs...	Salesperson	Activiti...	Company	Total	Status
500061	08/21/2023 06:34:37	Deco Addict		Mitchell Ad...		Demo Company	\$ 1,552.50	Sales Order
500060	08/21/2023 06:34:37	Deco Addict		Mitchell Ad...		Demo Company	\$ 690.00	Sales Order
500058	08/21/2023 06:34:37	Gemini Furniture		Mitchell Ad...		Demo Company	\$ 8,914.80	Sales Order
500057	08/21/2023 06:34:37	Gemini Furniture		Mitchell Ad...		Demo Company	\$ 20,182.50	Sales Order
500040	08/21/2023 06:34:37	YourCompany, Jo...		Mitchell Ad...		Demo Company	\$ 69.00	Sales Order

To create a new sales quotation, select the customer's name from the list. The Invoice Address, Delivery Address, pricelist, and Payment Terms will automatically populate based on the customer's information. Also, include the Referrer, Quotation Template, and Expiration Date. The Quotation Date field will display the creation date.

SalesOrdersTo InvoiceProductsReportingConfigurationDemo CompanyMitchell Admindemo_saas-163_a8a47dd34d...

NewQuotationsNew

Send by EmailConfirmPreviewQuotationQuotation SentSales Order

New

Customer ?Type to find a customer...Expiration ?09/20/2023

Invoice Address ?Quotation Date ?08/21/2023 16:23:00

Delivery Address ?Recurrence ?

Quotation Template ?Default TemplatePricelist ?

Payment Terms ?

Order LinesOptional ProductsOther InfoCustomer SignatureNotes

Product	Descr...	Quan...	UoM	Packa...	Packa...	Unit P...	Taxes	Disc.%	Tax excl.
Add a productAdd a sectionAdd a noteCatalog									

Under the Order Line, you can add products for the customer using the "Add a Line" button. Enter the Product, Description, Quantity, UoM, Unit Price, Taxes, Discount, and Subtotal. You can add as many products as needed.

SalesOrdersTo InvoiceProductsReportingConfiguration

Mitchell Admindemo_saas-163_a8a47dd34d...

New

Quotations

New

Quotation Template ?

Default Template

Pricelist ?

Payment Terms ?

Order Lines

Optional Products

Other Info

Customer Signature

Notes

Product	Descr...	Quan...	UoM	Packa...	Packa...	Unit P...	Taxes	Disc.%	Tax excl.
<div>Add a productAdd a sectionAdd a noteCatalog</div>									

Coupon Code

Promotions

Terms & Conditions: <https://demo6.odoo.com/terms>

Total: \$ 0.00

Businesses may provide customers with additional products as a part of their cross-selling techniques. In such circumstances, the Optional Products section is where you would mention those other products.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

Quotations

New

Mitchell Admin

demo_saas-163_a8a47dd34d...

Demo Company

Order Lines

Optional Products

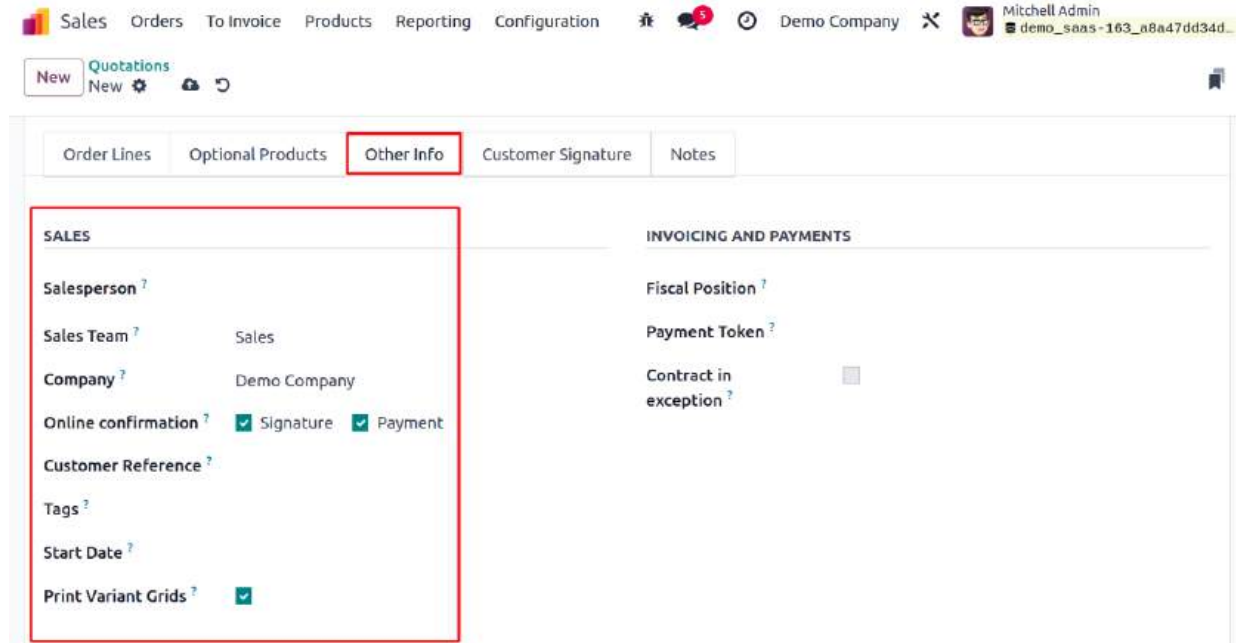
Other Info

Customer Signature

Notes

Product	Description	Quan...	UoM	Unit P...	Disc.%
Add a product					

In the Sales section, designate a Salesperson to manage the quotation. Sales Team and Company names will auto-populate. Enable Online Signature for online customer signing and Online Payment for payment options. Add Customer Reference and Tags to print variant grids and reference Fiscal Position for tax adjustments. Specify Analytic Account, Account Tags, and Payment Token, and activate Contract in Exception if needed.



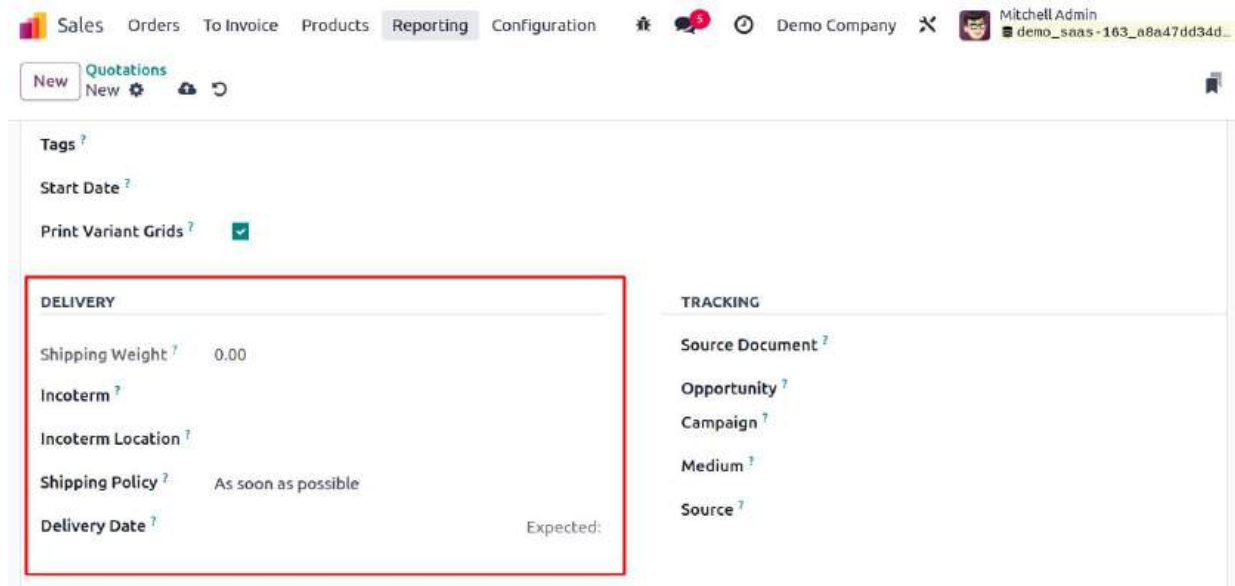
The screenshot shows the 'Other Info' tab of the Odoo Sales Quotations form. The 'SALES' section is highlighted with a red box. It contains the following fields:

- Salesperson ?
- Sales Team ? Sales
- Company ? Demo Company
- Online confirmation ? ☒ Signature ☒ Payment
- Customer Reference ?
- Tags ?
- Start Date ?
- Print Variant Grids ? ☒

The 'INVOICING AND PAYMENTS' section contains the following fields:

- Fiscal Position ?
- Payment Token ?
- Contract in exception ? ☐

Choose a Shipping Policy (as soon as possible or when all products are ready) and mention the delivery date in the Delivery Date column. In the Tracking section, fill in the Source Document, Opportunity, Campaign, Medium, and Source for tracking purposes. Activating Online Signature adds a tab for capturing the customer's signature on the quotation



The screenshot displays the Odoo Quotations form. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', 'Configuration', and a user profile 'Mitchell Admin'. Below the navigation bar, there are buttons for 'New', 'Quotations', and 'New'. The main form is divided into two sections: 'DELIVERY' and 'TRACKING'. The 'DELIVERY' section is highlighted with a red border and contains fields for 'Shipping Weight' (0.00), 'Incoterm', 'Incoterm Location', 'Shipping Policy' (As soon as possible), and 'Delivery Date' (Expected:). The 'TRACKING' section contains fields for 'Source Document', 'Opportunity', 'Campaign', 'Medium', and 'Source'.

DELIVERY	
Shipping Weight	0.00
Incoterm	
Incoterm Location	
Shipping Policy	As soon as possible
Delivery Date	Expected:

TRACKING	
Source Document	
Opportunity	
Campaign	
Medium	
Source	

Send the quotation to the client via email using the "Send By Email" option. If the customer approves the quotation, finalize the sale by clicking the Confirm button to convert it into a sales order. You can cancel the quotation using the Cancel button or view the customer preview by clicking the Preview button.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsNew

Send by EmailConfirmPreview

QuotationQuotation SentSales Order

New

CustomerType to find a customer...Expiration09/20/2023

Invoice AddressRecurrence

Delivery AddressPricelist?

Quotation TemplatePayment Terms

Order LinesOptional ProductsOther InfoNotes

Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
Add a product	Add a section	Add a note	Catalog				

As shown in the figure below, the status of the quotation will be changed to "Quotation Sent."

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsS00066

2 / 2<>

ConfirmSend by EmailPreviewCancel

QuotationQuotation SentSales Order

S00066

CustomerDeco Addict77 Santa Barbara RdPleasant Hill CA 94523United States – US12345673

Expiration09/20/2023

Recurrence

PricelistBenelux (USD)

Payment Terms30 Days

Invoice AddressDeco Addict

Delivery AddressDeco Addict

Quotation Template

Order LinesOptional ProductsOther InfoNotes

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc. %	Tax excl.
[FURN_666...	[FURN_6666] Acoustic Bloc Screens	1.00	Units	295.00	15%	0.00	\$ 295.00

Add a productAdd a sectionAdd a noteCatalog

Sale Order

You can now select the Confirm button. The status of the quotation will change to Sales Order after you click the CONFIRM button, as seen in the figure below.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotations500066Delivery

1 / 1<>

Create InvoiceSend by EmailPreviewCancel

QuotationQuotation SentSales Order

S00066

Customer:Deco Addict77 Santa Barbara RdPleasant Hill CA 94523United States - US12345673

Order Date:08/21/2023 17:23:30

Recurrence:

Invoice Address:Deco Addict

Delivery Address:Deco Addict

Pricelist:Benolux (USD)

Payment Terms:30 Days

Order LinesOther InfoNotes

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Tax excl.
[FURN_6666] Acoustic Bloc Screens	[FURN_6666] Acoustic Bloc Screens	1.00	Units	295.00	15%	0.00	\$ 295.00

[Add a product](#)[Add a section](#)[Add a note](#)[Catalog](#)

Terms & Conditions:<https://demo4.odoo.com/terms>

Add shipping

Untaxed Amount:\$ 295.00

Tax 15%:\$ 44.25

Total:\$ 339.25

The Sales Order Number, Order Date, Website, Customer, Salesperson, Activities, Company, Total, and Invoice Status are displayed in the platform's list view. Odoo supports List, Kanban, Calendar, Pivot, Graph, and Activity views. Filters and Group By options help streamline search operations with default and customizable choices.

Sales **Orders** To Invoice Products Reporting Configuration

New Quotations

Orders

Sales Teams

Customers

My Quotations Search...

1-29 / 29

Company Data

Set your company's data for documents header/footer.

Let's start!

Quotation Layout

Customize the look of your quotations.

Customize

Order Confirmation

Choose between electronic signatures or online payments.

Set payments

Sample Quotation

Send a quotation to test the customer portal.

Send sample

	Number	Creation ...	Customer	Website	Salespers...	Activities	Company	Total	Status
	S00066	08/21/2023 17:02	Deco Addict		Mitchell A...		Demo Company	\$ 339.25	Sales Order
	S00067	08/21/2023 17:21	Deco Addict		Mitchell A...		Demo Company	\$ 0.00	Quotation
	S00065	08/21/2023 16:58	Deco Addict		Mitchell A...		Demo Company	\$ 0.00	Quotation

In Odoo 17, creating invoices for sales orders is simple. After confirming a sales order, a "Create Invoice" button appears in the sales window.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsS00065

Delivery1

1 / 1 < >

Create InvoiceSend by EmailPreviewCancel

QuotationQuotation SentSales Order

S00065

CustomerDeco Addict77 Santa Barbara RdPleasant Hill CA 94523United States – US12345673

Invoice AddressDeco Addict

Delivery AddressDeco Addict

Order Date08/22/2023 12:52:35

Recurrence

PricelistBenelux (USD)

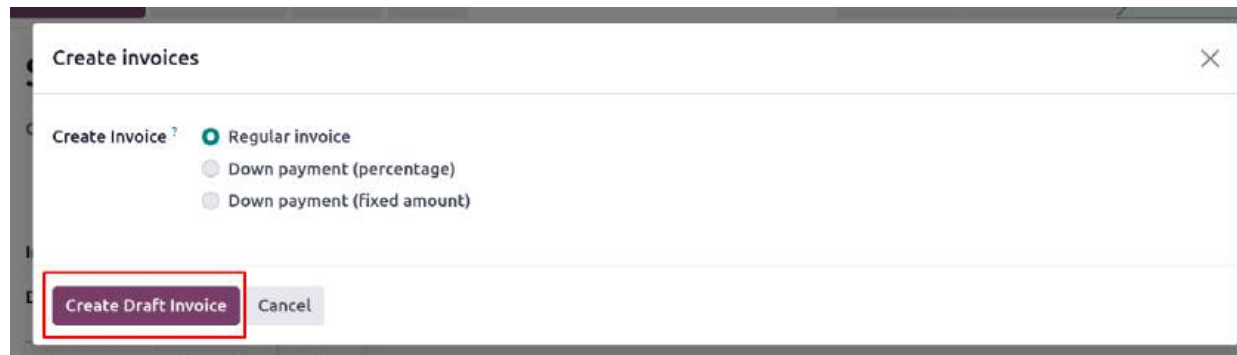
Payment Terms30 Days

Order LinesOther InfoNotes

Product	Descrip...	Quantity	Delivered	Invoiced	UoM	Unit Price	Taxes	Disc.%	Tax excl.
[FURN_6666] A	[FURN_6666] Acoustic Bloc Screens	1.00	1.00	0.00	Units	295.00	15%	0.00	\$ 295.00

CS CamScanner

Select "Create Invoice" from the menu. To choose the type of invoice, a popup window will open. Based on your organization's invoicing policies, choose between a Regular Invoice, Down Payment (%), or Down Payment (Fixed amount). Click "Create Draft Invoice" to view the draft in a new window.



After confirming the invoice, click "Register Payment" in Odoo 17 to process the payment.

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotations / S00061INV/2023/00005 (DOC)Sale Orders11 / 1<>

Send & PrintRegister PaymentPreviewCredit NoteReset to DraftDraftPosted

Customer Invoice

INV/2023/00005

CustomerDeco Addict77 Santa Barbara RdPleasant Hill CA 94523United States – US12345673

Invoice Date08/22/2023Payment Reference?INV/2023/00005Payment terms30 DaysJournalCustomer Invoices

Delivery Address?Deco Addict

Invoice LinesJournal ItemsOther Info

Product	Label	Account	Quantity	UoM	Price	Taxes	Tax excl.
Renovation Architect (Workspace Template)	Renovation Architect (Workspace Template)	400000 Product Sales	30.00	Units	45.00	15%	\$ 1,350.00

In the new wizard, define the Journal, Payment Bank, Recipient Bank Account, Amount, Payment Date, and Memo. Click "Create Payment." The invoice status will change to "In Payment," and to "Paid" once the customer completes the payment.

Register Payment



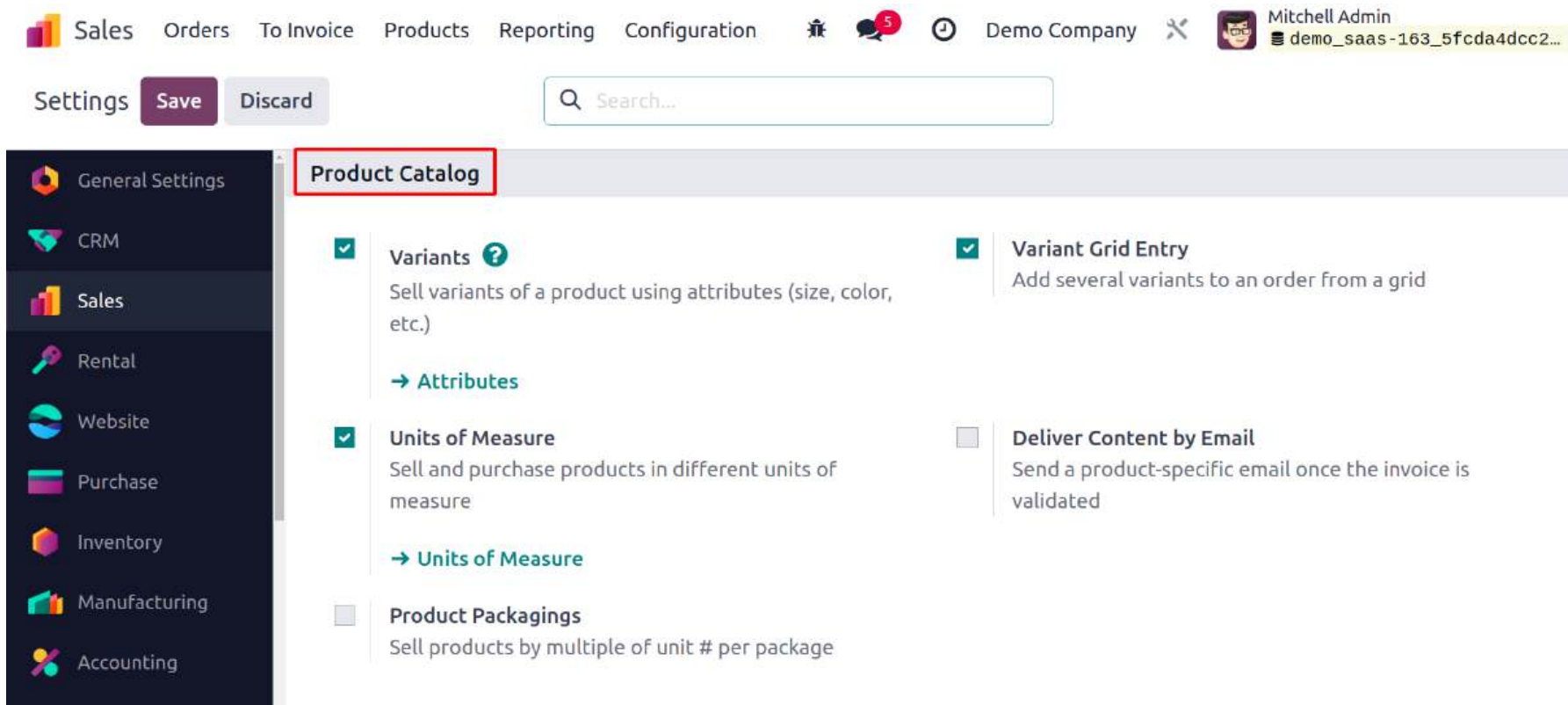
Journal	Bank	Amount	\$1,552.50
Payment Method [?]	Manual	Payment Date	08/22/2023
Recipient Bank Account		Memo	INV/2023/00005

Create Payment

Discard

The Odoo 17 Sales module includes several advanced options in its Settings menu to enhance functionality. These features can be activated or deactivated based on your specific needs, allowing for a more tailored implementation. Depending on the tasks you perform, you can adjust these settings to optimize sales operations. Let's explore these options in more detail.

In the Odoo 17 Sales module, you can configure product variants and attributes by enabling the "variants" option from the Product Catalog menu. You can also set multiple units of measure for products by activating the "Units of Measure" option, which is essential for managing sales effectively.



Odoo 17 allows you to manage and sell packaged goods by enabling the "Product Packagings" option. You can specify packaging types in the product settings under the Inventory tab. The Inventory module also helps in managing product bundles efficiently.

The screenshot displays the Odoo 17 Product form with the 'Inventory' tab selected. The 'PACKAGING' section at the bottom is highlighted with a red box. It contains a table with columns for 'Packag...', 'Conta...', 'Unit of Mea...', 'Sa...', 'Pu...', 'Barcode', and 'Company'. Below the table is an 'Add a line' button. Other sections visible include 'OPERATIONS' with 'Routes' (Buy checked, Manufacture unchecked) and 'View Diagram' link; 'LOGISTICS' with fields for 'Responsible' (Mitchell Admin), 'Weight' (0.00 kg), 'Volume' (0.00 m³), 'Customer Lead Time' (0.00 days), 'HS Code', and 'Origin of Goods'; and 'COUNTERPART LOCATIONS' with 'Production Location' and 'Inventory Location' both set to 'Virtual Locations/Production' and 'Virtual Locations/Inventory adjustment' respectively.

Packag...	Conta...	Unit of Mea...	Sa...	Pu...	Barcode	Company
Add a line						

Enable the "Variant Grid Entry" feature to add multiple product variants to a sales order. In the Attributes & Variants tab of the product setup, you can configure variant selection with two options: Product Configurator or Order Grid Entry. When creating a sales order, a pop-up will appear for selecting product variants.

The screenshot displays the Odoo Product Setup interface. The top navigation bar includes tabs for Sales, Orders, To Invoice, Products, Reporting, and Configuration. The 'Products' tab is active, and the 'Attributes & Variants' sub-tab is selected and highlighted with a red box. Below the navigation bar, there are buttons for 'New', 'Extra Prices', 'Go to Website', and 'More'. The main content area shows a table with columns for 'Attribute' and 'Values'. The 'Color' attribute is listed with 'White' and 'Black' values, each with a close button. A 'Configure' button and a trash icon are also present. Below the table, there is a warning message: 'Warning: adding or deleting attributes will delete and recreate existing variants and lead to the loss of their possible customizations.' At the bottom, a red box highlights the 'SALES VARIANT SELECTION' section, which contains two radio button options: 'Product Configurator' (selected) and 'Order Grid Entry'.

Sales Orders To Invoice Products Reporting Configuration Demo Company Mitchell Admin demo_saas-163_5fcd44dccc2...

New Products New 0 Extra Prices Go to Website In: 0 Out: 0 More

General Information **Attributes & Variants** Sales Purchase Inventory Accounting

Attribute	Values
Color	White x Black x
Add a line	

Warning: adding or deleting attributes will delete and recreate existing variants and lead to the loss of their possible customizations.


SALES VARIANT SELECTION

☒ Product Configurator

☐ Order Grid Entry

1. Product Configurator

Configure

Product	Quantity	Price
<div><div></div><div><div>Shirt (White)</div><div>COLOR</div><div><div></div><div></div></div></div></div> <div><div>-</div><div>1</div><div>+</div></div> <div>\$ 1.00</div>		
		Total: \$ 1.00

Confirm

Back

2. Grid Entry

Choose Product Variants

×

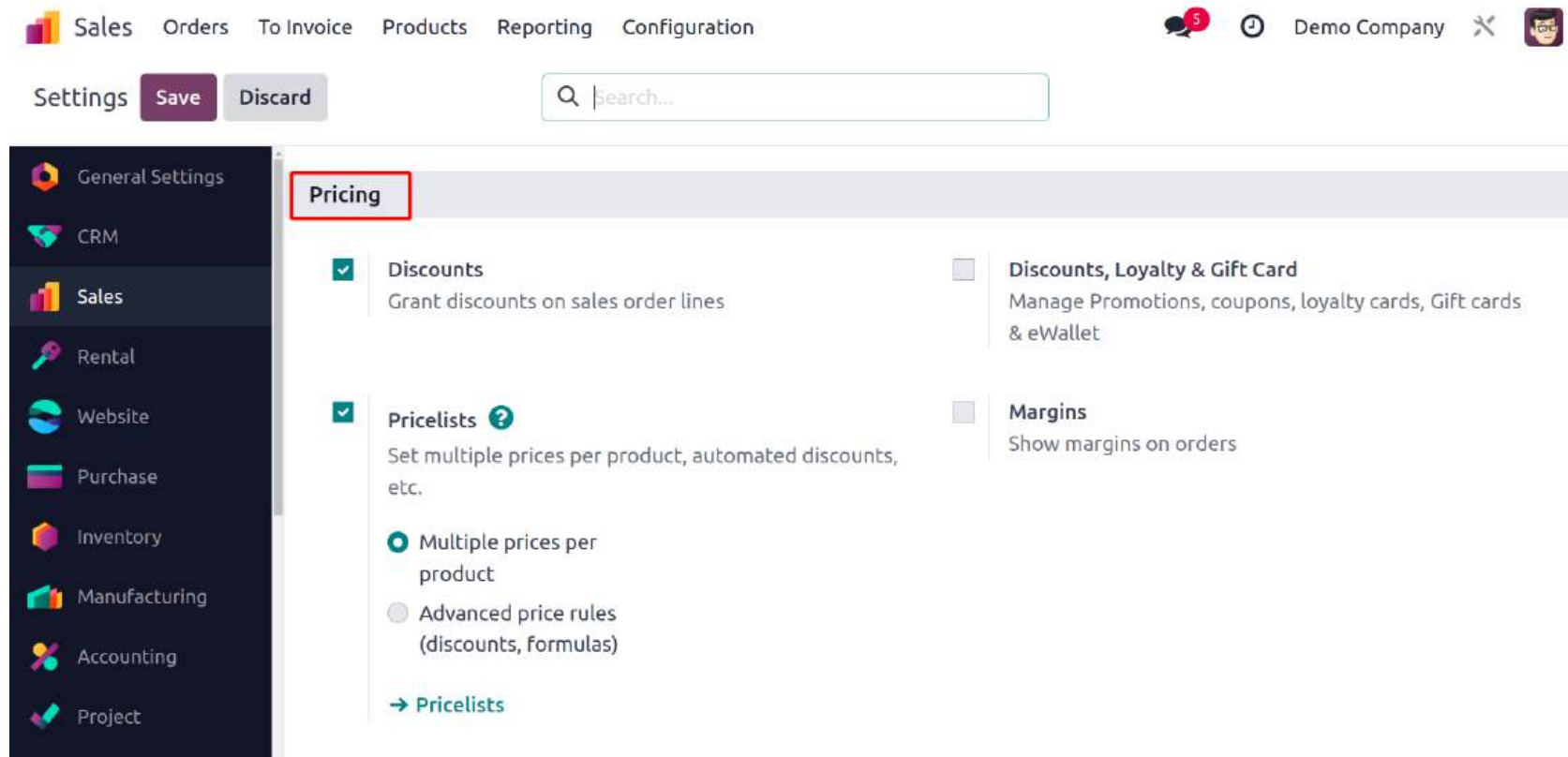
Shirt	White	Black
	0	0

Confirm

Discard

Pricing

The pricing tab in the Settings contains options Discounts, Pricelists, Discounts & Gift Card, and Margin.



Enable the "Discounts" feature from the Pricing tab in the Settings menu to apply discounts to sales order lines. Discounts can be added manually or automatically based on the applicable price list.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

Quotations

New

5

Demo Company

Send by Email

Confirm

Preview

Quotation

Quotation Sent

Sales Order

New

Customer

Type to find a customer...

Expiration

09/22/2023

Invoice Address

Recurrence

Delivery Address

Pricelist ?

Quotation Template

Payment Terms

Order Lines

Optional Products

Other Info

Notes

Product	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
[FURN_6666] Acousti...	1.00	Units	100.00		10.00	\$ 90.00

Add a product

Add a section

Add a note

Catalog

Odoo 17 introduces a new discount option in the order line, accessible after enabling the "Discount" feature. You can select and apply discounts directly from the order line.

The screenshot displays the Odoo 17 Sales Orders interface. At the top, there is a navigation bar with tabs for Sales, Orders, To Invoice, and Products. Below this, a header section shows the current document type as 'New Quotations' with the ID 'S00083'. The main content area is divided into several sections. On the left, there are tabs for 'Order Lines', 'Optional Products', 'Other Info', 'Customer Signature', and 'Notes'. Below these tabs is a table with columns for 'Product', 'Description', 'Quan...', 'UoM', 'Unit P...', 'Taxes', 'Disc.%', and 'Tax excl.'. The table is currently empty, with links for 'Add a product', 'Add a section', 'Add a note', and 'Catalog'. On the right side of the interface, there are three buttons: 'Coupon Code', 'Promotions', and 'Discount'. The 'Discount' button is highlighted with a red rectangle. Below these buttons, there is a 'Terms & Conditions' link. At the bottom right, there are two summary fields: 'Total: \$ 0.00' and 'Margin ? : \$ 0.00'.

Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
Add a product	Add a section	Add a note	Catalog				

Coupon Code Promotions **Discount**

Terms & Conditions: <https://53721724-master-all.runbot105.odoo.com/terms>

Total: **\$ 0.00**

Margin ? : \$ 0.00

The user can apply a global discount, a fixed discount, or a discount on every order line by using this. Select a single kind and apply the coupon.

The discount will then be added to the order line by clicking the Apply button, as seen in the screenshot below.

Discount

Discount [?] 10 %

☒ On All Order Lines

☐ Global Discount

☐ Fixed Amount

Apply

Discard

Sales Orders To Invoice Products +

My Company (San Francisco)

Clem 53721724-master-all

New Quotations S00083

1 / 41

Order Lines	Optional Products	Other Info	Customer Signature	Notes			
Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
[FURN_6666] Aco...	[FURN_6666] Acoustic Bloc Screens	1.00	Units	295.00	15%	10.00	\$ 265.50
<div>Add a product Add a section Add a note Catalog</div>							
<div>Coupon Code Promotions Discount Add shipping</div>							
Terms & Conditions: https://53721724-master-all.runbot105.odoo.com/terms							
						Untaxed Amount:	\$ 265.50
						Tax 15%:	\$ 39.83
						Total:	\$ 305.33

Enable the "Margins" feature from the Settings menu to include margins in sales orders or quotes. The margin is calculated by subtracting the product cost from its sales price.

Sales Orders To Invoice Products Reporting Configuration

New

Quotations

S00065

1 / 1

Order Lines

Optional Products

Other Info

Notes

Product	Quantity	UoM	Unit Price	Cost	Taxes	Disc.%	Tax excl.
[FURN_6666] Acoustic Bloc Screens	1.00	Units	200.00	150.00		0.00	\$ 200.00

Add a product

Add a section

Add a note

Catalog

Add shipping

Coupon Code

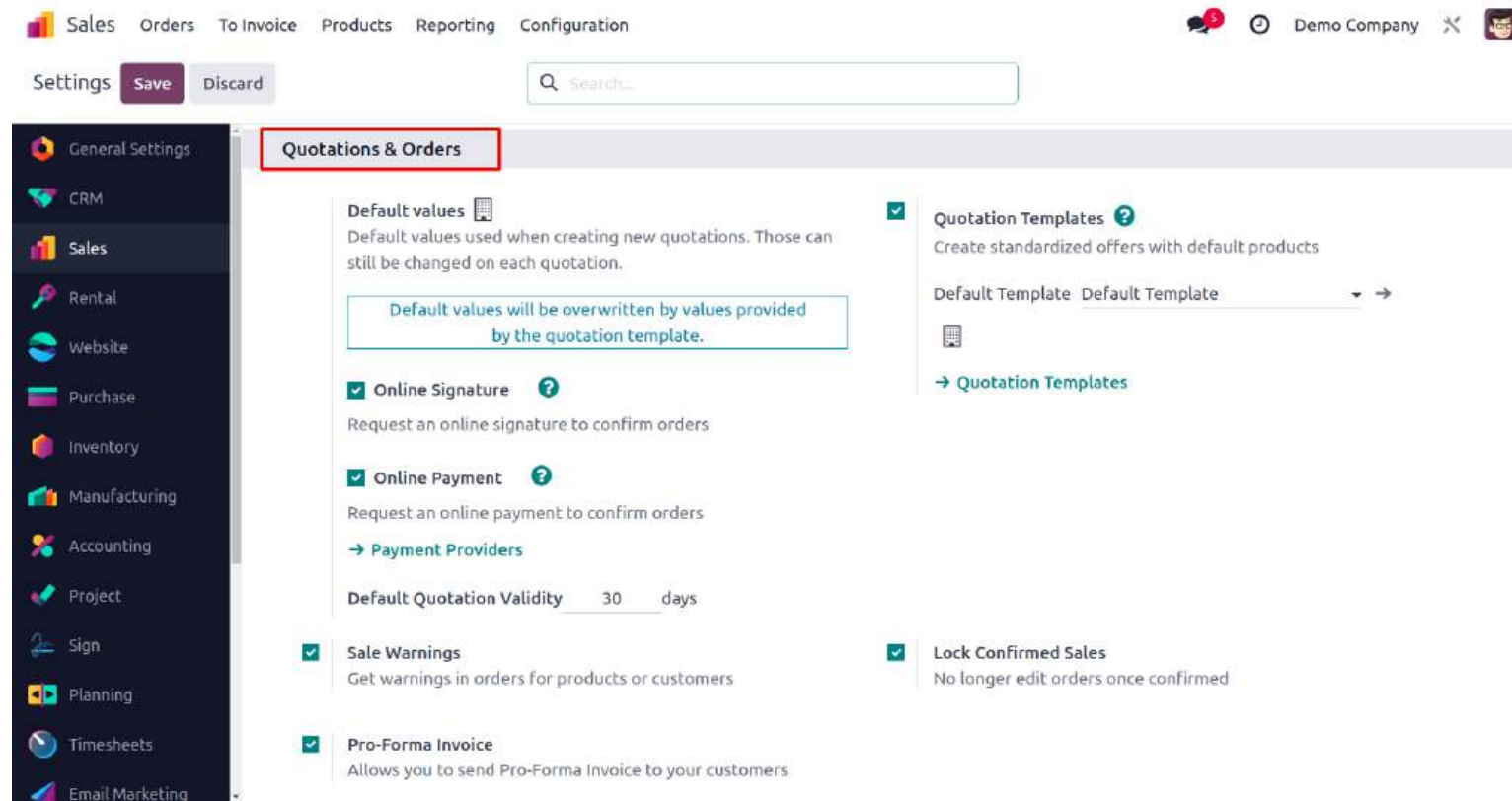
Promotions

Terms & Conditions: <https://demo6.odoo.com/terms>

Total: \$ 200.00

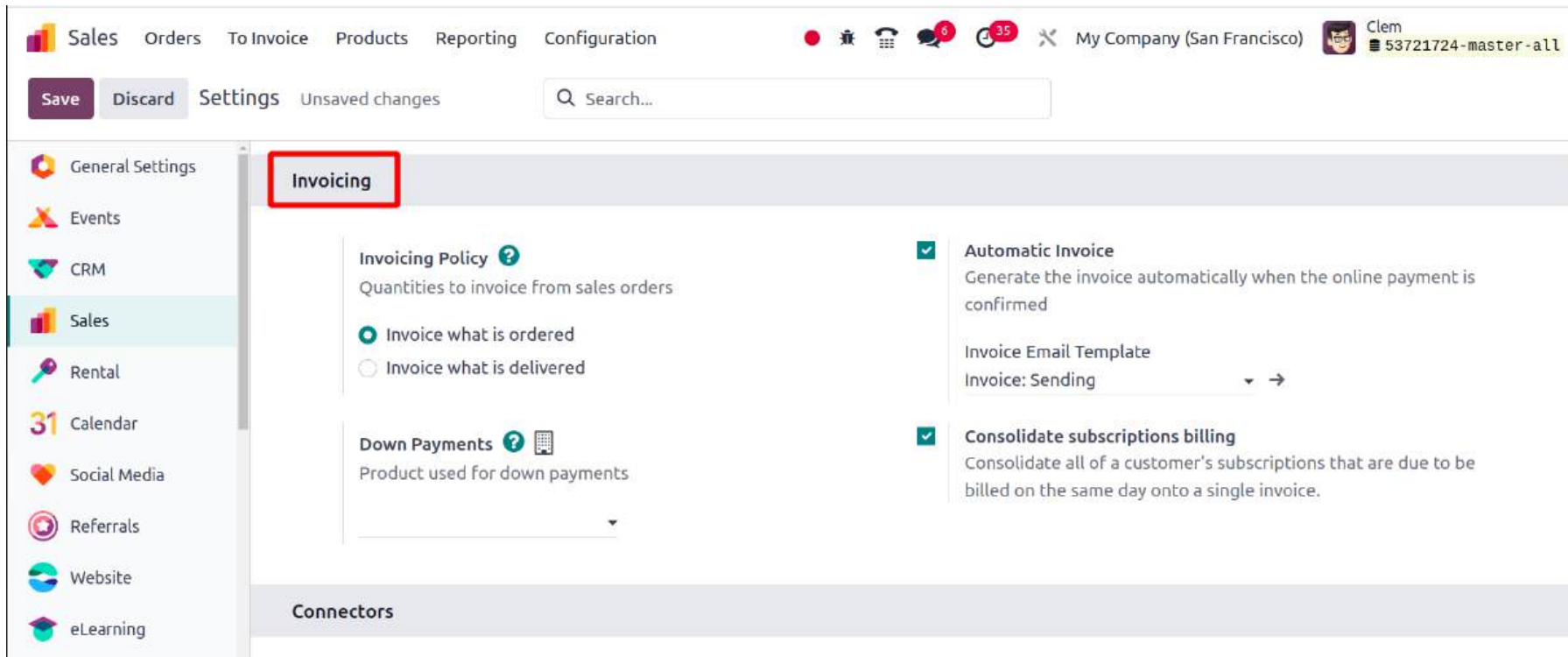
Margin: \$ 50.00 (25%)

The Quotations & Orders tab includes features like Default Values, Quotation Templates, Online Signature, Online Payment, Sale Warning, Pro-Forma Invoice, and Lock Confirmed Sale.



Invoicing

The Invoicing tab contains Invoicing Policy, Down Payments, Automatic Invoice, and Consolidate subscription billing.



The screenshot shows a software interface with a top navigation bar containing 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. On the right of the top bar, there are notification icons, a clock showing 3:35, and a user profile for 'Clem' with ID '53721724-master-all'. Below the top bar is a secondary bar with 'Save', 'Discard', 'Settings', and 'Unsaved changes' buttons, followed by a search bar. A left sidebar lists various modules: 'General Settings', 'Events', 'CRM', 'Sales' (highlighted), 'Rental', 'Calendar', 'Social Media', 'Referrals', 'Website', and 'eLearning'. The main content area is titled 'Invoicing' (highlighted with a red box) and contains four settings sections: 'Invoicing Policy' with a help icon and a description 'Quantities to invoice from sales orders', featuring two radio buttons ('Invoice what is ordered' is selected, 'Invoice what is delivered' is unselected); 'Down Payments' with a help icon and a description 'Product used for down payments', featuring a dropdown menu; 'Automatic Invoice' with a checkmark icon, a description 'Generate the invoice automatically when the online payment is confirmed', and an 'Invoice Email Template' dropdown set to 'Invoice: Sending'; and 'Consolidate subscriptions billing' with a checkmark icon and a description 'Consolidate all of a customer's subscriptions that are due to be billed on the same day onto a single invoice.'.