

COSMETICS PROJECT

DEPI

Testing &
validation



OVERVIEW

01

About Us

02

Our Team

03

Project Timeline

04

Project overview

05

SET UP MODULES



ABOUT US



We specialize in implementing tailored Odoo ERP solutions for cosmetics wholesale businesses. Our expertise lies in streamlining operations, from inventory and sales management to invoicing and customer relationship management.



We understand the unique challenges of the beauty industry and design solutions that optimize stock levels, enhance order processing, and improve overall business efficiency. Whether you're looking to integrate multiple departments or gain insights through detailed reporting, our customized Odoo setups empower you to scale and grow seamlessly.





OUR TEAM

Mostafa Tamer

odoo application consultant

Amr Abdelsattar

odoo application consultant

Asmaa abdelhakeem

odoo application consultant

Omar gamal

odoo application consultant

Amira hany

odoo application consultant

Mennatullah Esam

odoo application consultant

Planning & Organization

System Selection

PROJECT TIMELINE

- Phase 1: Discovery & Requirement Gathering (Week 1-2)
- Phase 2: System Design & Configuration (Week 3-4))
- Phase 3 Data Migration & Integration (Week 5-6)
- Phase 4: Testing & Training (Week 7-8)
- Phase 5: Go-Live & Support (Week 9-10)

In

Go Live

Implementation

- 1-Odoo system configuration and customization.
- 2-Data migration and integration



Discovery - requirements gathering



Testing & validation

Installation

Testing, staff training, and system launch



PROJECT OVERVIEW

implementing Odoo ERP to optimize the operations of a Cosmetics wholesale and distribution, including inventory management, Purchase management , sales management , Accounting and CRM thereby enhancing efficiency and accuracy

01

GOAL

streamline business operations through Odoo.

02

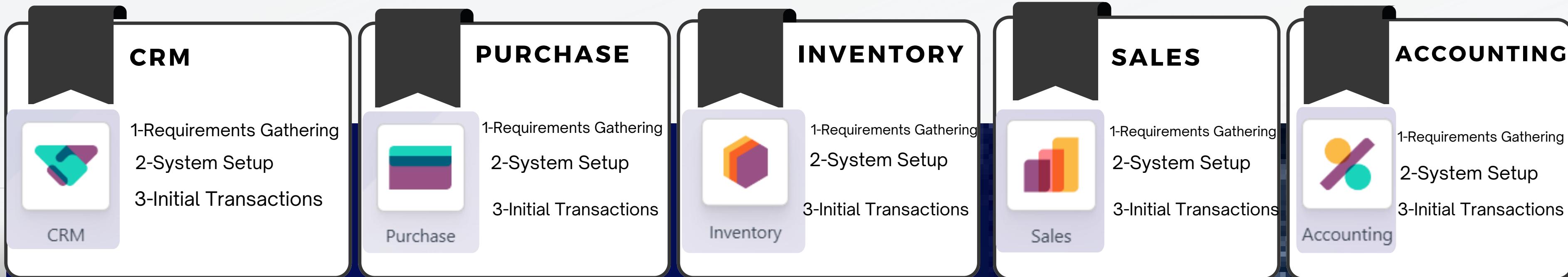
Expected Outcomes

- Improved sales order management and customer service through CRM, which enhancing customer satisfaction.
- Efficient handling of accounting, invoicing, and financial reporting



MODULES

implement Odoo ERP to optimize the operations of a Cosmetics wholesale and distribution.





CRM

CRM MODULE

Welcome to this presentation on the Odoo CRM module, a powerful tool designed to help businesses efficiently manage and enhance customer relationships. Whether it's tracking leads, nurturing opportunities, or closing deals, Odoo CRM provides a comprehensive platform to streamline sales processes, improve customer satisfaction, and drive business growth. In this presentation, we'll explore how Odoo CRM empowers organizations to optimize their sales pipeline, automate tasks, and gain actionable insights into customer behavior—all within a single, integrated solution.

Leads feature

Leads feature

The 'Leads' feature in Odoo CRM is a powerful tool for capturing and managing potential customers. Leads represent the first step in the sales pipeline, and they can be automatically generated from various sources, such as website forms, emails, or imported lists. This feature helps sales teams track, qualify, and convert leads into valuable opportunities.

The screenshot shows the Odoo CRM interface with the 'Leads' feature highlighted. The 'Leads' section includes a sub-section for 'Add a qualification step before the creation of an opportunity'. Other sections shown include 'Recurring Revenues', 'Multi Teams', 'Predictive Lead Scoring', and 'Rule-Based Assignment'. A 'New' button is visible at the top of the list view.

- Recurring Revenues
Define recurring plans and revenues on Opportunities
- Leads
Add a qualification step before the creation of an opportunity
- Multi Teams
Assign salespersons into multiple Sales Teams.
- Predictive Lead Scoring
The success rate is computed based on Stage, Phone Quality, and Email Quality for the leads created as of the 09/24/2024.
- Rule-Based Assignment ⓘ
Periodically assign leads based on rules

New

The screenshot shows the Odoo CRM Leads list view. The top navigation bar includes 'New', 'Generate Leads', and 'Leads ⚙'. The list displays two leads: 'Lead' and 'Cosmetics'. The 'Cosmetics' lead is associated with the email address '7@gmail.com'.

Lead	Email
Cosmetics	7@gmail.com

[Home](#)[Shop](#)[Services](#)[Pricing](#)[About Us](#)[Contact us](#)[+1 555-555-5556](#)[Menna ▾](#)[Contact Us](#)

Confidence and Radiant Beauty

[Explore our exclusive range](#)

Contact us

Contact us about anything related to our company or services.

We'll do our best to get back to you as soon as possible.

Your Name *

Menna

Phone Number

+2001140905282

Your Email *

7@gmail.com

Your Company *

....

Subject *

Cosmetics

Your Question *

Cosmetics Prices

My Company

📍 3575 Fake Buena Vista Avenue

📞 +1 555-555-5556

✉️ info@yourcompany.example.com

Submit

- After a customer submits their information on the website, a new lead is automatically generated in Odoo. After that employee can convert it to opportunity or mark as lost.

The screenshot shows the Odoo Leads module interface. At the top, there are buttons for 'New', 'Generate Leads', and 'Leads'. Below this, a list of leads is displayed. The first lead in the list is for 'Cosmetics', which has an email address listed as '7@gmail.com'. On the right side of the screen, a detailed view of this lead is shown. The lead is named 'Cosmetics' and has a probability of '91.67 %'. It is associated with a customer named 'Menna' and a company name '....'. The lead's address is partially filled with 'Street...', 'Street 2...', 'City', and 'Country'. The lead is assigned to a salesperson and a sales team. There are tabs for 'Convert to Opportunity' and 'Lost'. To the right of the lead details, there is a summary of contact information: Contact Name (Menna), Email (7@gmail.com), Email cc, Job Position, Phone (+2001140905282), Mobile, Priority (4 stars), and Tags.

Field	Value
Contact Name	Menna
Email	7@gmail.com
Email cc	
Job Position	
Phone	+2001140905282
Mobile	
Priority	★★★★
Tags	

Managing Opportunities and Stages in Odoo CRM

Managing Opportunities and Stages in Odoo CRM

In Odoo CRM, opportunities represent qualified leads that have progressed to the next phase of the sales pipeline. Each opportunity can be tracked through different stages, from initial contact to final negotiation. As leads are converted into opportunities, they move through predefined stages, helping sales teams stay organized and focused on closing deals.

1-Opportunity Stages: Opportunities pass through various customizable stages such as 'New', 'Qualified',

'proposition', and 'Won/Lost', giving a clear visual representation of the sales pipeline.

2-Lead Conversion: Once a lead is qualified, it can be easily converted into an opportunity, transitioning from the initial lead phase to active sales engagement.

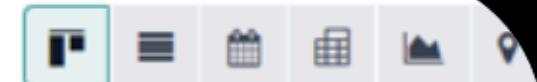
3-Pipeline Visualization: The drag-and-drop interface allows sales teams to easily move opportunities between stages, making it simple to track the progress of each potential sale.

New

Generate Leads

Pipeline

Search...



New
1,710

Bentley Intense
500.00 LE
Perfumes



+
M

Biolage Hydrasource Shampoo
600.00 LE
Bath & Body Care



S

Anastasia Beverly Hills Liquid Lipsticks
300.00 LE
Makeup



S

Maybelline Fit Me Matte
10.00 LE
Makeup



S

Dior Sauvage
100.00 LE
Perfumes



S

Qualified
1,650

L'Oreal Paris Voluminous Lash Paradise
Mascara
1,500.00 LE
Makeup



+
Proposition
22,500

Carolina Herrera Good Girl
150.00 LE
Perfumes



Method Body Wash
22,500.00 LE
Method Body Wash
Bath & Body Care



S

+
Won
400

L'Oreal Paris Elvive Total Repair 5
Conditioner
100.00 LE
Bath & Body Care



S

Bath and body work body care
300.00 LE
Bath & Body Care



+
M

New Pipeline Method Body Wash

No Meeting Quotations Orders 24,000.00 LE

9 / 11 < 9 / 11 <

New Quotation Won Lost New 47m Qualified Proposition 2d Won

Method Body Wash

Expected Revenue Probability
22,500.00 LE at 91.67 %

Contact? Method Body Wash Salesperson S Sales5
Email Gamal@gmail.com Expected Closing? ★★★
Phone 555-765-4321 Tags Bath & Body Care

Customer Size

Internal Notes Extra Information

< CRM Sales Leads Reporting Configuration Edu - Cosmetics Team 1 / 1 <

New Quotations S00027

Delivery 1 Invoices 1

Send by Email Preview Cancel Quotation Quotation Sent > Sales Order

S00027

Customer mennoamer204@gmail.com Order Date 10/15/2024 16:22:59
Invoice Address mennoamer204@gmail.com Pricelist Default (EGP)
Delivery Address mennoamer204@gmail.com Payment Terms Immediate

Order Lines	Other Info	Customer Signature							
Product	Quantity	Delivered	Invoiced UoM	Packaging Q...	Packaging	Unit Price	Taxes	Disc.%	Amount
Method Body Wash	15.00	0.00	15.00 Units			100.00	14%	0.00	1,500.00 LE
Add a product	Add a section	Add a note	Catalog						

Coupon Code Reward Discount Add shipping

Untaxed Amount: 1,500.00 LE
VAT 14%: 210.00 LE
Total: 1,710.00 LE

Terms and conditions...

New Quotations / S00027
INV/2024/00002

Payments 1 Sale Orders 1

1 / 1 < >

Print & Send Preview Credit Note Reset to Draft Draft **Posted**

Customer Invoice

INV/2024/00002

PAID

Customer mennaamer204@gmail.com
Delivery Address ? mennaamer204@gmail.com

Invoice Date 10/15/2024
Due Date 10/15/2024
Journal Customer Invoices

Invoice Lines	Journal Items	Other Info		
Product	Account	Quantity UoM	Price Taxes	Amount
Method Body Wash	500001 Sales Account	15.00 Units	100.00 14%	1,500.00 LE
Terms and Conditions			Untaxed Amount: 1,500.00 LE VAT 14%: 210.00 LE Total: 1,710.00 LE	

Paid on 10/15/2024 1,710.00 LE

CRM Sales Leads Reporting Configuration

 Edu - Cosmetics Team 

New Quotations / S00027
WHM/OUT/00046 

Moves Valuation

Print Return Draft Waiting Ready Done

★ WHM/OUT/00046

Delivery Address: mennaamer204@gmail.com

Scheduled Date: 10/15/2024 16:22:59

Operation Type: Main Warehouse: Delivery Orders

Effective Date: 10/15/2024 16:23:08

Source Location: WHM/Quality Check

Source Document: S00027

Operations	Additional Info	Note		
Product	Packaging	Demand	Quantity	Unit
Method Body Wash	Packaging	15.00	15.00	Units

The 'Customer Size' feature in Odoo CRM allows businesses to evaluate and categorize customers based on their potential value and the size of the opportunity. This feature is customizable, enabling companies to define customer size categories that align with their unique sales processes.

A screenshot of the Odoo CRM interface for a contact record titled "Method Body Wash". The top navigation bar shows "New Quotation", "Won", "Lost", "New 47m", "Qualified", "Proposition 2d", and "W". The contact details include "Expected Revenue" (22,500.00 LE) and "Probability" (at 91.67 %). Below this, there are fields for "Contact" (Method Body Wash), "Email" (Gamal@gmail.com), and "Phone" (555-765-4321). On the right side, there are fields for "Salesperson" (Sales5), "Expected Closing" (with three stars), and "Tags" (Bath &Body Care). A red box highlights the "Customer Size" field, which has a dropdown menu open showing options: "Internal Notes" (selected), "Premium", "VIP", and "Regular".

In Odoo CRM, the 'Lost Reasons' feature allows sales teams to define and categorize why deals or opportunities were lost. By identifying and tracking these reasons, employees can easily select the appropriate reason when closing a lost opportunity, while managers gain valuable insights to improve decision-making and refine sales strategies

CRM Sales Reporting Configuration

New Lost Reasons

Search... 1-4/4

Description
Too expensive
We don't have people/skills
Not enough stock
Low Quality

Not enough stock

Configuration

Settings

Sales Teams

Teams Members

Activities

Activity Types

Activity Plans

Pipeline

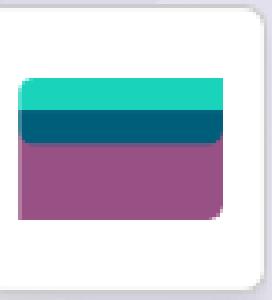
Stages

Tags

Lost Reasons

Lead Generation

Lead Mining Requests



Purchase

Purchase Module

The procurement module in Odoo is a powerful tool designed to streamline the purchasing process for businesses of all sizes. It enables efficient management of supplier relationships, purchase orders, and inventory levels. By integrating seamlessly with other modules, it enhances visibility and control over procurement activities. This ensures that organizations can optimize their spending and improve operational efficiency.

There are many options and features available in this module that can be utilized to achieve satisfactory results for the client.

The screenshot shows the Odoo Purchase module settings page. The top navigation bar includes links for Purchase, Orders, Products, Reporting, and Configuration. On the far right, there is a user icon with a notification count of 5 and the text "Edu - Cosmetics Team". Below the navigation is a toolbar with Save, Discard, and Settings buttons, and a search bar labeled "Search...".

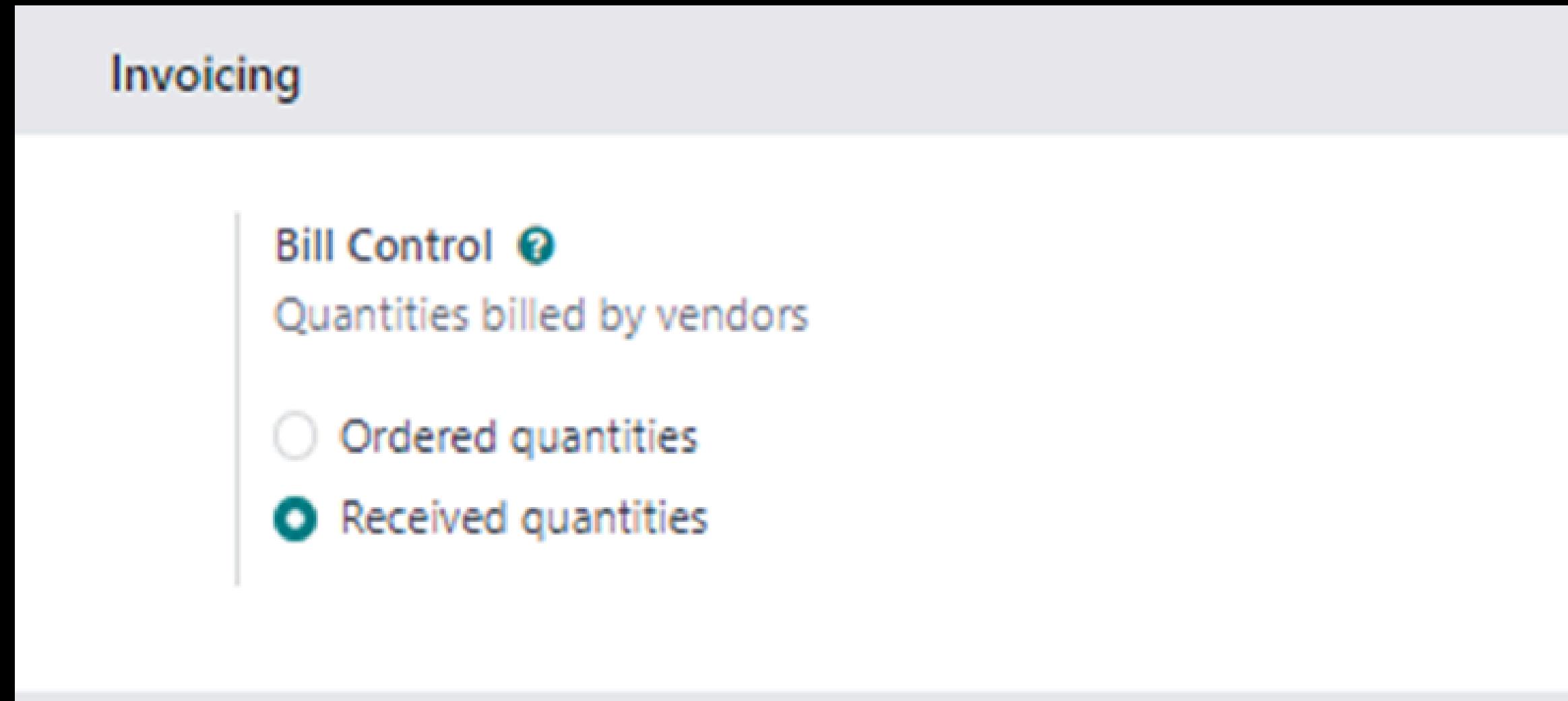
The main content area is divided into sections: General Settings, CRM, Sales, Calendar, Website, Purchase (which is selected and highlighted in blue), Inventory, and Accounting. The "Purchase" section contains several configuration items:

- Orders**:
 - Purchase Order Approval: Request managers to approve orders above a minimum amount. A "Minimum Amount" field is set to 5,000.00 LE.
 - Warnings: Get warnings in orders for products or vendors.
 - Receipt Reminder: Automatically remind the receipt date to your vendors.
 - Lock Confirmed Orders: Automatically lock confirmed orders to prevent editing.
 - Purchase Agreements: Manage blanket orders and purchase templates.
 - Purchase Alternatives: Link RFQs together and compare them.
- Invoicing**:
 - Bill Control: Quantities billed by vendors. Options include "Ordered quantities" (radio button) and "Received quantities" (radio button, selected).
 - 3-way matching: Make sure you only pay bills for which you received the goods you ordered.

This option determines the purchase cycle method,
I have two options available:

Based on Order: The invoice is created based on the purchase order.

Based on Delivery: The invoice is created based on the receipt of the products.





Purchase Order Approval

Request managers to approve orders above a minimum amount

Minimum
Amount

5,000.00 LE



Lock Confirmed Orders

Automatically lock confirmed orders to prevent editing

"purchase order approval" option is very important as it helps managers ensure that regular users or data entry personnel cannot enter an invoice that exceeds a specified amount.

The "lock confirm order" option prevents users from modifying the document after it has been created until they receive approval from their managers. This reduces the risk of manipulation by users.



Warnings

Get warnings in orders for products or vendors



Purchase Agreements

Manage blanket orders and purchase templates



Purchase Alternatives

Link RFQs together and compare them

The Warning has three levels.

- No message
- Warning
- Block message

The Purchase Agreement provides several options, the most important of which are: Establishing a long-term contract with a supplier for large quantities, with deliveries based on demand. Allowing you to compare multiple clients. Enabling the creation of a ready-made purchase template that can be invoked at any time.



Dropshipping ?

Request your vendors to deliver to your customers

It allows you to manage orders that are shipped directly from the supplier to the customer without the need to store products in your inventory.



Variants

Purchase variants of a product using attributes (size, color, etc.)

→ [Attributes](#)

It is used to manage products that are available in multiple forms or attributes, such as colors, sizes, and styles. It allows you to create different variants of the same product, making it easier for customers to choose what suits them. This option helps organize inventory and facilitates the sales and marketing process, as each variant can be tracked separately.



Inventory

INVENTORY MODULE

PRODUCT TRACKING

- Track various cosmetic products, including SKUs, lot numbers, and expiry dates.

BATCH MANAGEMENT

- Manage batches to ensure efficient stock rotation and quality control.

LOCATION TRACKING

- Track product location - warehouse, store, etc. for precise inventory control

1-Create Products

Define products with details like name, SKU, and barcode.

The screenshot shows the Odoo navigation bar with 'Inventory', 'Overview', 'Operations', 'Products', and 'Reporting'. Below the navigation bar, there is a purple button labeled 'New Products' with a gear icon. A cursor arrow is pointing towards this button.

2-Define Locations

Set up warehouse locations for accurate stock tracking

This screenshot shows the 'Warehouses' configuration screen for the 'Main Warehouse'. The 'Short Name' is set to 'WHM'. Under the 'RESUPPLY' section, 'Buy to Resupply' is checked, and 'Resupply From' options include 'Retail warehouse' and 'Consignment'. A red number '3' is overlaid on the top right corner of the window.

This screenshot shows the 'Products' configuration screen for a product named 'Aussie 3 Minute Miracle Deep Conditioner'. The product type is 'Goods', with a sales price of 300.00 LE and purchase taxes of 14%. Other details include 'Edu - Cosmetics Team' under 'Address', 'Ordered quantities' under 'Invoicing Policy', and 'Shampoo' under 'Category'. A red number '3' is overlaid on the top left corner of the window.

This screenshot shows the 'Locations' configuration screen. It lists several internal locations: 'Internal Location', 'Internal Location', 'Internal Location', 'Internal Location', and 'Internal Location'. A red number '4' is overlaid on the bottom left corner of the window.

Configuring the Inventory Module for Cosmetics

1-Product Categories
Organize products into categories like lipstick, eyeshadow, etc

2-Lot/Serial Numbers
Enable lot/serial number tracking for quality control and expiry dates.

3 consignment -Inventory
it indicates a situation where goods are sent to a customer or vendor, but ownership remains with the seller until the items are sold.

Configuration

- Settings
- Warehouse Management
 - Warehouses
- Operations Types
- Locations
- Storage Categories
- Putaway Rules
- Products
 - Product Categories
 - Attributes
 - Product Packagings
 - Barcode Nomenclatures
- Units of Measures
- UoM Categories
- Delivery
 - Delivery Methods
 - Zip Prefix

We enable
consignment Feature ,
press save then going
to configuration setting
to create this
consignment press on
warehouses then press
new we named
consignment and msut
put short name ex. WHC

Inventory Overview Operations Products Reporting

New Warehouses 

Inventory Overview Operations Products Reporting Configuration

Save Discard Settings Unsaved changes

Search...

Traceability

- Lots & Serial Numbers  Get a full traceability from vendors to customers
 - Print GS1 Barcodes for Lots & Serial Numbers Use GS1 nomenclature datamatrix whenever barcodes are printed for lots and serial numbers.
 - Display Lots & Serial Numbers on Delivery Slips Lots & Serial numbers will appear on the delivery slip
- Expiration Dates  Set expiration dates on lots & serial numbers
- Consignment  Set owner on stored products 

Valuation

Inventory Overview Operations Products Reporting Configuration

New Warehouses  Routes

3 / 3 < >

Warehouse ? Consignment 

Short Name ? WHC  Address ? Edu - Cosmetics Team

Warehouse Configuration Technical Information

RESUPPLY

Buy to Resupply ?

Resupply From ? Main Warehouse Retail warehouse

Inventory Overview

- Main Warehouse (3)
 - Receipts
 - Main Warehouse
 - 3 To Receive
- Retail warehouse (3)
 - Receipts
 - Retail warehouse
 - Open
- Consignment (3)
 - Receipts
 - Cons
 - New ✓
 - View
 - All
 - Ready
 - Waiting
 - Add to Favorites
 - Configuration

Inventory Overview

New WHC/IN/00002

Draft Ready Done

WHC/IN/00002

Receive From? cosmetic products from L'Oreal Paris company ✓

Scheduled Date? 10/23/2024 09:33:14

Operation Type? Consignment: Receipts

Effective Date? 10/23/2024 09:43:37

Destination Location? WHC/Stock

Source Document?

Assign Owner? cosmetic products from L'Oreal Paris company ✓

Operations Additional Info Note

Product	Packaging	Demand	Quantity	Unit
L'Oreal Paris Elvive Total Repair 5		15.00	15.00	Units
L'Occitane Almond Shower Oil		20.00	20.00	Units
L'Oreal Paris Voluminous Lash Paradise Mascara		30.00	30.00	Units
L'Oreal Paris Elvive Total Repair 5 Conditioner		25.00	25.00	Units
L'Oreal Paris Infallible Pro-Matte Foundation		10.00	10.00	Units

Send message Log note WhatsApp Activities

Today

M Amira - 7 minutes ago • Draft → Done (Status)

M Amira - 17 minutes ago Transfer created

We press on overview to appear this page and create new consignment then we have to create which we are going to receive from and most important thing we have to create assign owner this thing refers to that goods not related to your goods and last thing choose these inventory and press validate

We have to enable landed costs feature

In Odoo, the Landed Costs feature is used to take additional costs into account when calculating the valuation of a product. This includes the cost of shipment, insurance, customs duties, taxes, and other fees.

Valuation

Landed Costs ?
Add additional cost (transport, customs, ...) in the value of the product.

Display Lots & Serial Numbers on Invoices
Lots & Serial numbers will appear on the invoice

We have to create these costs and most important thing choose the product type as service in the general information moreover choose as a landed cost in the purchase

Inventory Overview Operations Products Reporting Configuration

New Products customs

Product? **customs**

Sales? Purchase?

General Information Attributes & Variants Sales Purchase Accounting

Product Type? Goods Service Combo

Invoicing Policy? Ordered quantities

Invoice ordered quantities as soon as this service is sold.

Sales Price? 1.00 LE per Units

Sales Taxes? 14% (= 1.14 LE Incl. Taxes)

Cost? 0.00 LE per Units

Purchase Taxes? 14%

Category? Shampoo

Reference?

Product? **customs**

Sales? Purchase?

General Information Attributes & Variants Sales Purchase Accounting

Purchase Unit? Units Is a Landed Cost?

Default Split Method? Control Policy? On ordered quantities On received quantities

REORDERING VENDOR BILLS

Subcontract Service?

PURCHASE DESCRIPTION

This note is added to purchase orders.

Next step that create PO and receipt it most important thing to receipt it before create landed costs that's why to appear in the transfers the number of receipt choose the additional costs so press on Validate and last thing see Valuation adjustment on the Goods

Purchase Orders Products Reporting Configuration

New Requests for Quotation / P00035 WHM/IN/00039

Validate Print Return Cancel Draft Ready Done

WHM/IN/00039

Receive From ? 15. Mansoura Scheduled Date ? 10/24/2024 08:49:13

Operation Type ? Main Warehouse: Receipts Deadline ? 10/24/2024 08:49:13

Destination Location ? WHM/Receipt Source Document ? P00035

Assign Owner ?

Operations Additional Info Note

Product	Packaging	Demand	Quantity	Unit
Dove Nutritive Solutions Daily Moisture		10.00	10.00	Units
Dove Nutritive Solutions Conditioner		15.00	15.00	Units
Dove Deep Moisture Body Wash		5.00	5.00	Units
Add a line				

Inventory Overview Operations Products Reporting Configuration

New Landed Costs LC/2024/0001

Validate Cancel Draft Posted

LC/2024/0001

Date ? 10/24/2024 Journal ? Inventory Valuation

Transfers ? WHM/IN/00039 X Vendor Bill ?

Additional Costs Valuation Adjustments

Cost Line	Product	Quantity	Original Value	New Value	Additional Lan...
customs	Dove Nutritive Solutions Daily Moisture	10.00	2,000.00 LE	2,100.00 LE	100.00 LE
transportation	Dove Nutritive Solutions Daily Moisture	10.00	2,000.00 LE	2,100.00 LE	100.00 LE
customs	Dove Nutritive Solutions Conditioner	15.00	4,500.00 LE	4,600.00 LE	100.00 LE
transportation	Dove Nutritive Solutions Conditioner	15.00	4,500.00 LE	4,600.00 LE	100.00 LE
customs	Dove Deep Moisture Body Wash	5.00	500.00 LE	600.00 LE	100.00 LE
transportation	Dove Deep Moisture Body Wash	5.00	500.00 LE	600.00 LE	100.00 LE

New Requests for Quotation P00035

Receive Products Confirm Receipt Date Create Bill Unlock

Purchase Order

P00035

Vendor ? 15. Mansoura Confirmation Date ? 10/24/2024 08:51:23

Vendor Reference ? Expected Arrival ? 10/24/2024 08:49:13

Agreement ? Ask confirmation

Deliver To ? Main Warehouse: Receipts

Products Other Information Alternatives

Product	Quantity	Received	Billed	UoM	Packaging Q...	Packaging	Unit Price
Dove Nutritive Solutions Daily Moist...	10.00	0.00	0.00	Units			200.00
Dove Nutritive Solutions Conditioner	15.00	0.00	0.00	Units			300.00
Dove Deep Moisture Body Wash	5.00	0.00	0.00	Units			100.00

Define your terms and conditions ... Untaxed Amount: 7,000.00 LE

Inventory Overview Operations Products Reporting Configuration

New Landed Costs New

Validate Cancel Draft Posted

New

Landed Cost ? Date ? 10/24/2024 Journal ? Inventory Valuation

1 WHM/IN/00039 X Vendor Bill ?

Final Costs Valuation Adjustments

Description	Account	Split Method	Cost
customs		Equal	300.00 LE
transportation		Equal	300 LE

Total ? : 300.00 LE Compute

```
Button (no string)
• Object: purchase.order
• Invisible: incoming_picking_count == 0
• Button Type: object
• Method: action_view_picking
```

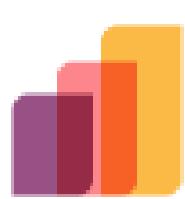
Locked

5- Reordering Rules automate restocking: when stock dips below a set level, Odoo triggers orders to reach the desired quantity.

The screenshot shows the Odoo Inventory module. At the top, there are several status indicators: 'Go to Website' (red icon), '0.00 Units On Hand' (cube icon), '0.00 Units Forecasted' (cube icon), 'Product Moves' (arrow icon), and 'Reorderin...' (reorder icon). The 'Reorderin...' button is highlighted with a red box.

The main interface displays a list of products under 'Products / Burberry London for Men Reordering Rules'. The table columns include Product, Location, On Hand, Forecast, Min, Max, To Order, and Order. A row for 'Burberry London for Men' shows 'WHM/Quality Check' as the location, '0.00' as On Hand, '0.00' as Forecast, '100.00' as Min, '400.00' as Max, '400.00' as To Order, and an 'Order' button. A red arrow points from the 'Reorderin...' button at the top to the 'Order' button in the table.

A modal window titled 'Replenishment Information for Burberry London for Men in Main Warehouse' is open. It contains two sections: 'Lead Times' and 'Sales History'. The 'Lead Times' section states: 'The forecasted stock on the 10/25/2024 is below the inventory minimum of 100.00 : 400.00 should be replenished to reach the maximum of 400.00.' It also shows 'Today' as 10/25/2024 and 'Forecasted Date' as 10/25/2024.



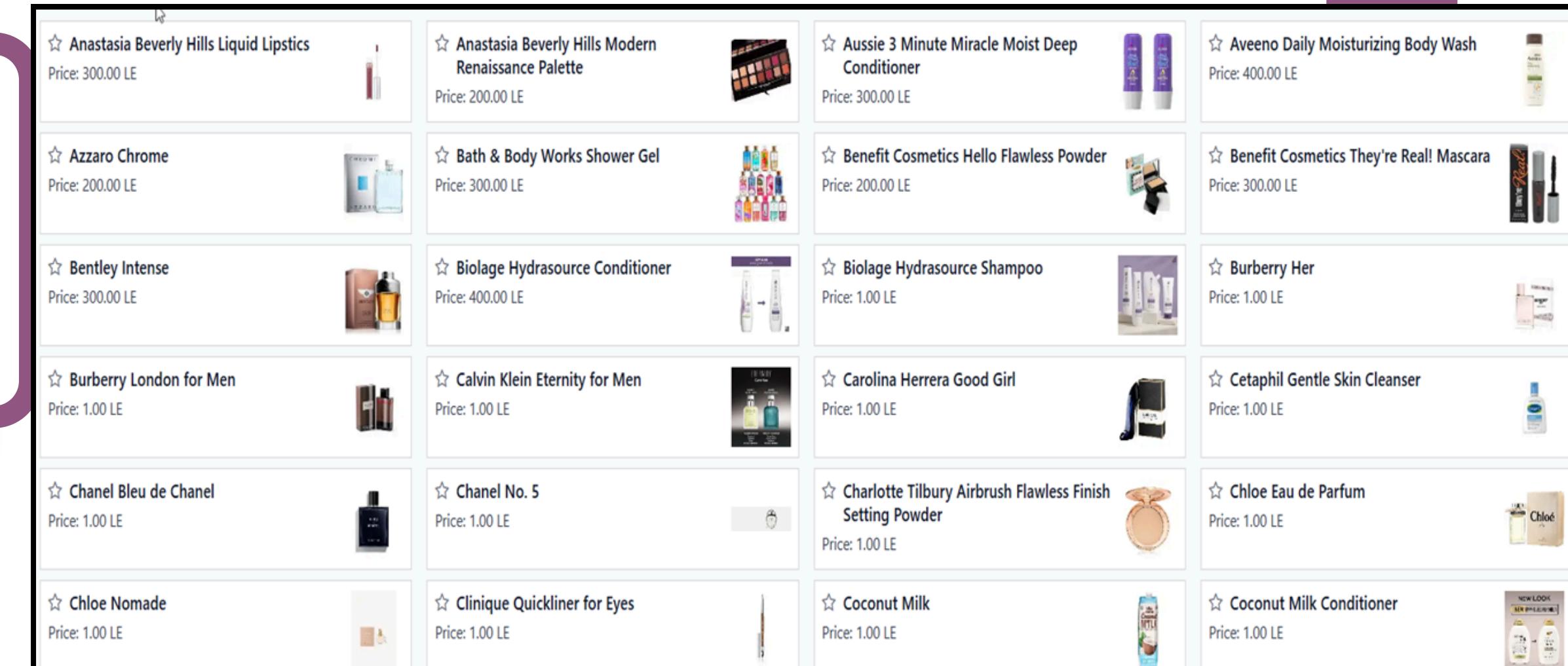
Sales

SALES MODULE

The module aims to streamline the sales cycle and make it more efficient by automating many routine tasks and minimizing errors, saving companies time and resources while boosting operational efficiency. In this project, we will explore the steps involved in using the Odoo Sales module and how it can meet companies' needs by enhancing customer experience and achieving sustainable revenue growth.

01 — Product Templates

product templates for cosmetics, including product attributes like brand, type, size, and ingredients for accurate inventory management.



Product

★ Anastasia Beverly Hills Liquid Lipsticks

Sales Purchase

General Information	Sales	Purchase	Inventory	Accounting
Product Type ? <input checked="" type="radio"/> Goods <input type="radio"/> Service <input type="radio"/> Combo	Sales Price ? 300.00 LE			
Track Inventory ? <input type="checkbox"/>	Sales Taxes ? 14% ×			
Invoicing Policy ? Ordered quantities <i>You can invoice goods before they are delivered.</i>	Cost ? 100.00 LE			
	Purchase Taxes ? 14% ×			
	Category Makeup			
	Reference			
	Barcode			

02 – Sales Setup

Configure sales teams with specific roles and permissions, ensuring efficient order processing and customer management

Sales Team

Makeup Masters

TEAM DETAILS

Team Leader

Email Alias ? alias @ edu-cosmetics-team.odoc

Accept Emails From ? Everyone

Invoicing Target ? 0.00 / Month

Members

Add

 Sales1	 Sales 2
✉ sales@glamour.com	✉ contact@bliss.com

Sales Team	Alias	Team Leader
⋮ Sales	info@edu-cosmetics-team.odoo.com	
⋮ Companies teams	Inactive Alias	 Mostafa Tamer
⋮ Individual teams	1@edu-cosmetics-team.odoo.com	 Amr Abdelsatar
⋮ Makeup Masters	Inactive Alias	
⋮ Cosmetics Squad	Inactive Alias	
⋮ Perfume Experts	Inactive Alias	

2.1 - Discount and price list

Create detailed price lists for various cosmetic product categories, accommodating different retail and wholesale pricing strategies

Sales Order

Quotation Quotation Sent Sales Order

Create Invoice Send by Email Preview Cancel

S00006

Customer Ali Ibrahim
Beni Suef
Egypt

Order Date 10/13/2024 19:05:13
Pricelist Default (EGP)
Payment Terms Immediate

Order Lines Other Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
Anastasia Beverly Hills Liquid Lipsticks	2.00	0.00	0.00	300.00		600.00 LE
Azzaro Chrome	2.00	0.00	0.00	200.00		400.00 LE

Add a product Add a section Add a note Catalog

Terms and conditions... Untaxed Amount: 1,000.00 LE Total: 1,000.00 LE

Discount

After dis

Sales Order

Quotation Quotation Sent Sales Order

Create Invoice Send by Email Preview Cancel

S00005

Customer Ali Ibrahim
Beni Suef
Egypt

Order Date 10/13/2024 19:05:47
Pricelist Default (EGP)
Payment Terms Immediate Payment

Order Lines Other Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc%	Amount
Anastasia Beverly Hills Liquid Lipsticks	2.00	0.00	0.00	300.00		5.00	570.00 LE
Azzaro Chrome	2.00	0.00	0.00	200.00		5.00	380.00 LE

Add a product Add a section Add a note Catalog

Terms and conditions... Untaxed Amount: 950.00 LE Total: 950.00 LE

Discount

A. Price list based on fixed price

New
Pricelists
VIP (EGP)

2 / 6 < >

Print

VIP

Country Groups

Price Rules		Min. Quantity	Start Date	End Date
Apply on	Price			
All Products	150.00 LE	0.00	10/13/2024 19:00:00	10/29/2024 20:00:00
Add a line				

Customer Ahmed Khaled
Expiration 11/13/2024
Pricelist Default (EGP)
Payment Terms Immediate

Order Lines	Optional Products	Other Info

Product Quantity Unit Price Taxes Disc.% Amount

Anastasia Beverly Hills Liquid Lipsticks	1.00	300.00		0.00	300.00 LE
Anastasia Beverly Hills Modern Renaissance Palette	1.00	200.00		0.00	200.00 LE

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

Discount

Untaxed Amount: 500.00 LE

Total: 500.00 LE

Margins: 200.00 LE (40%)

Untaxed Amount: 300.00 LE

Total: 300.00 LE

Margin: 100.00 LE (33.33%)

S00008

Customer Ahmed Khaled
Order Date 10/13/2024 19:21:36
Alexandria
Egypt
Pricelist VIP (EGP)
Payment Terms Immediate

Order Lines	Other Info

Product Quantity Delivered Invoiced Unit Price Taxes Disc.% Amount

Anastasia Beverly Hills Liquid Lipsticks	1.00	0.00	0.00	150.00		0.00	150.00 LE
Anastasia Beverly Hills Modern Renaissance Palette	1.00	0.00	0.00	150.00		0.00	150.00 LE

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

After

B. Price list based on discount

privet discount

Open: Pricelist Rules

Apply To: Product (radio button selected) **Category:**

Min Qty: 0.00

Validity Period: 10/13/2024 19:00:00 → 10/22/2024 20:00:00

Product: All products

Price Type: Discount (radio button selected) Formula Fixed Price

Discount: 10.00 % on sales price

Save **Discard**

S00018

Customer Ahmed Khaled

Alexandria
Egypt

Expiration: 11/13/2024

Pricelist: Default (EGP)

Payment Terms: Immediate Payment

Order Lines	Optional Products	Other Info
-------------	-------------------	------------

Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Aussie 3 Minute Miracle Deep Conditioner	1.00	300.00		0.00	300.00 LE
Aveeno Daily Moisturizing Body Wash	1.00	400.00		0.00	400.00 LE

Add a product Add a section Add a note Catalog

Terms and conditions...

After

S00009

Customer Ahmed Khaled

Order Date: 10/13/2024 19:26:41

Alexandria
Egypt

Pricelist: privet discount (EGP)

Payment Terms: Immediate Payment

Order Lines	Other Info
-------------	------------

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	Amount
Aussie 3 Minute Miracle Deep Conditioner	1.00	0.00	0.00	300.00		10.00	270.00 LE
Aveeno Daily Moisturizing Body Wash	1.00	0.00	0.00	400.00		10.00	360.00 LE

Add a product Add a section Add a note Catalog

Discount

Untaxed Amount: 700.00 LE

Total: 700.00 LE

Terms and conditions...

Untaxed Amount: 630.00 LE

Total: 630.00 LE

Print

C. Price list formula based on sales price

vip customer

Open: Pricelist Rules

Apply To: Product Category
Product: All products
Price Type: Discount Formula Fixed Price
Based price: Sales Price
Discount: 10.00 %
Round off to: 0.00
Extra Fee: 0.00

Min Qty: 0.00
Validity Period: 10/13/2024 19:00:00 → 10/21/2024 20:00:00
End Date: 10/21/2024 20:00:00

Sales Price with a 10 % discount and 0.00 LE extra fee
Example: $100.00 \text{ LE} * 0.9 + 0.00 \text{ LE} \rightarrow 90.00 \text{ LE}$

Tip: want to round at 9.99?
round off to 10.00 and set an extra at -0.01

Save **Discard**

Send message **Log note** **Activities**

S00019

Customer: Amina Saeed Sharqia Egypt

Expiration: 11/13/2024
Pricelist: Default (EGP)
Payment Terms: Immediate

Order Lines	Optional Products	Other Info			
Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Benefit Cosmetics Hello Flawless Powder	1.00	200.00		0.00	200.00 LE
Benefit Cosmetics They're Real! Mascara	1.00	300.00		0.00	300.00 LE

Add a product **Add a section** **Add a note** **Catalog**

Discount
Untaxed Amount: **500.00 LE**
Total: **500.00 LE**

Margin: 150.00 LE (30%)

After

S00010

Customer: Amina Saeed Sharqia Egypt

Order Date: 10/13/2024 19:32:08
Pricelist: vip customer (EGP)
Payment Terms: Immediate

Order Lines	Other Info						
Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	Amount
Benefit Cosmetics Hello Flawless Powder	1.00	0.00	0.00	180.00		0.00	180.00 LE
Benefit Cosmetics They're Real! Mascara	1.00	0.00	0.00	270.00		0.00	270.00 LE

Add a product **Add a section** **Add a note** **Catalog**

Discount
Untaxed Amount: **450.00 LE**
Total: **450.00 LE**

Margin: 100.00 LE (22.22%)

October 13,

privet cost

D. Price list formula based on cost

Open: Pricelist Rules

Price Rules	Apply To ? <input checked="" type="radio"/> Product <input type="radio"/> Category	Min Qty ? 0.00
Apply on	Product ? All products	Validity Period ? 10/13/2024 19:00:00 → 10/21/2024 20:00:00
All Products	Price Type ? <input type="radio"/> Discount <input checked="" type="radio"/> Formula <input type="radio"/> Fixed Price	
Add a line	Based price ? Cost	Cost with a 10 % markup and 0.00 LE extra fee Example: 100.00 LE * 1.1 + 0.00 LE → 110.00 LE
	Markup ? 10.00 %	Tip: want to round at 9.99? round off to 10.00 and set an extra at -0.01
	Round off to ? 0.00	
	Extra Fee ? 0.00	
	Save Discard	

S00020

Customer Amina Nour
Shibin El Kom
Egypt

Expiration ? 11/13/2024
Pricelist ? Default (EGP)
Payment Terms Immediate

Order Lines	Optional Products	Other Info		
Product	Quantity	Unit Price Taxes	Disc.%	Amount
Benefit Cosmetics Hello Flawless Powder	1.00	200.00	0.00	200.00 LE
Benefit Cosmetics They're Real! Mascara	1.00	300.00	0.00	300.00 LE
Add a product Add a section Add a note Catalog				
<input type="button" value="Discount"/>				
Untaxed Amount: 500.00 LE Total: 500.00 LE				
Margin: 150.00 LE (30%)				

Terms and conditions...

S00011

Customer Amina Nour
Shibin El Kom
Egypt

Order Date ? 10/13/2024 19:39:04
Pricelist ? privet cost (EGP)
Payment Terms Immediate

Order Lines	Other Info
Product	Quantity Delivered Invoiced Unit Price Taxes Disc.% Amount
Benefit Cosmetics Hello Flawless Powder	1.00 0.00 0.00 110.00 0.00 110.00 LE
Benefit Cosmetics They're Real! Mascara	1.00 0.00 0.00 275.00 0.00 275.00 LE
Add a product Add a section Add a note Catalog	
<input type="button" value="Discount"/>	
Untaxed Amount: 385.00 LE Total: 385.00 LE	
Margin: 35.00 LE (9.09%)	

Terms and conditions...

October 13, 2024

other vip

E. Price list formula based on other price list

Open: Pricelist Rules

Price Rules	Apply To ? <input checked="" type="radio"/> Product <input type="radio"/> Category	Min Qty ? 0.00
Apply on	Product ? All products	Validity Period ? 10/13/2024 19:00:00 → 10/21/2024 20:00:00
All Products	Price Type ? <input type="radio"/> Discount <input checked="" type="radio"/> Formula <input type="radio"/> Fixed Price	
Add a line	Based price ? Other Pricelist	Other Pricelist with a 5 % discount and 0.00 LE extra fee Example: 100.00 LE * 0.95 + 0.00 LE → 95.00 LE
	Other Pricelist VIP (EGP)	
	Discount ? 5.00 %	Tip: want to round at 9.99? round off to 10.00 and set an extra at -0.01
	Round off to ? 0.00	
	Extra Fee ? 0.00	

Save **Discard**

S00021

Customer Beauty Bliss
Cairo
Egypt

Expiration ? 11/13/2024
Pricelist ? Default (EGP)
Payment Terms Immediate

Order Lines	Optional Products	Other Info		
Product	Quantity	Unit Price Taxes	Disc.%	Amount
Anastasia Beverly Hills Liquid Lipsticks	1.00	300.00	0.00	300.00 LE
Anastasia Beverly Hills Modern Renaissance Palette	1.00	200.00	0.00	200.00 LE

Add a product Add a section Add a note Catalog

Discount

Untaxed Amount: 500.00 LE
Total: 500.00 LE

Margin: 300.00 LE (60%)

S00013

Customer Beauty Bliss
Cairo
Egypt

Order Date ? 10/13/2024 19:45:19
Pricelist ? other vip (EGP)
Payment Terms Immediate

Order Lines	Other Info
Product	Quantity Delivered Invoiced Unit Price Taxes Disc.% Amount
Anastasia Beverly Hills Liquid Lipsticks	1.00 0.00 0.00 142.50 0.00 142.50 LE
Anastasia Beverly Hills Modern Renaissance Pale...	1.00 0.00 0.00 142.50 0.00 142.50 LE

Add a product Add a section Add a note Catalog

Discount

Untaxed Amount: 285.00 LE
Total: 285.00 LE

Margin: 85.00 LE (29.82%)


After

2.2 -

Discount & loyalty

coupons in Odoo are an effective way to increase customer interaction and encourage purchases.



Program Name 10% discount

Program Type Coupons
Generate & share coupon codes manually. It can be used in eCommerce, Point of Sale or regular orders to claim the Reward. You can define constraints on its usage through conditional rule.

Currency EGP

Pricelist ?

Rules & Rewards

Conditional rules

If minimum 2 item(s) bought
If minimum 150.00 spent

Add

Rewards

10.00% discount on your order

New / 10% discount / Coupons
10% discount: 044a-25a2-4b95

Code: 044a-25a2-4b95

Expiration Date: 10/20/2024

copy

S00014

Customer Ahmed Hossam
Maadi
Egypt

Expiration ? 11/12/2024

Pricelist ? Default (EGP)

Payment Terms Immediate

Order Lines	Optional Products	Other Info			
Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Anastasia Beverly Hills Modern Renaissance Palette	1.00	200.00		0.00	200.00 LE
Anastasia Beverly Hills Liquid Lipsticks	1.00	300.00		0.00	300.00 LE
Add a product Add a section Add a note Catalog					
Discount Untaxed Amount: 500.00 LE Total: 500.00 LE Margin: 300.00 LE (60%)					

Terms and conditions...

S00014

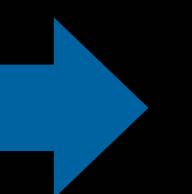
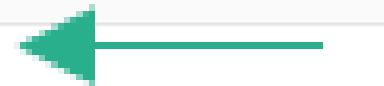
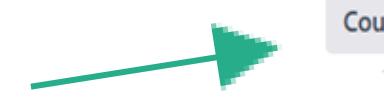
Customer Ahmed Hossam
Maadi
Egypt

Expiration ? 11/12/2024

Pricelist ? Default (EGP)

Payment Terms Immediate

Order Lines	Optional Products	Other Info			
Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Anastasia Beverly Hills Modern Renaissance Palette	1.00	200.00		0.00	200.00 LE
Anastasia Beverly Hills Liquid Lipsticks	1.00	300.00		0.00	300.00 LE
10% on your order	1.00	-50.00		0.00	-50.00 LE
Add a product Add a section Add a note Catalog					
Coupon Code Reward Discount Untaxed Amount: 450.00 LE Total: 450.00 LE Margin: 250.00 LE (55.56%)					

Enter Promotion or Coupon Code

Coupon Code

Apply **Discard**

- Apply free product

Open: Rewards

REWARD	AMONG
Reward Type Free Product	Quantity rewarded 1
Description on order Free Product - Anastasia Beverly Hills Liquid Lipsticks	Product Anastasia Beverly Hills Liquid Lipsticks
	Product Tag

Save **Discard** **Delete**

Program Name
20% discount

Program Type Coupons
Generate & share coupon codes manually. It can be used in eCommerce, Point of Sale or regular orders to claim the Reward. You can define constraints on its usage through conditional rule.

Currency EGP

Pricelist ?

Rules & Rewards

Conditional rules

If minimum 2 item(s) bought
If minimum 150.00 spent

Add

Rewards

Free product
Anastasia Beverly Hills Liquid Lipsticks

Send by Email Confirm Preview Cancel

Quotation Quotation Sent Sales Order

S00022

Customer Dalia Ahmed
Cairo
Egypt

Expiration ? 11/13/2024
Pricelist ? Default (EGP)
Payment Terms Immediate

Order Lines	Optional Products	Other Info
Product		
Quantity	Unit Price Taxes	Disc.% Amount
Anastasia Beverly Hills Liquid Lipsticks	1.00 300.00	0.00 300.00 LE
Aveeno Daily Moisturizing Body Wash	1.00 400.00	0.00 400.00 LE
Add a product Add a section Add a note Catalog		

Terms and conditions...

Coupon Code Reward Discount

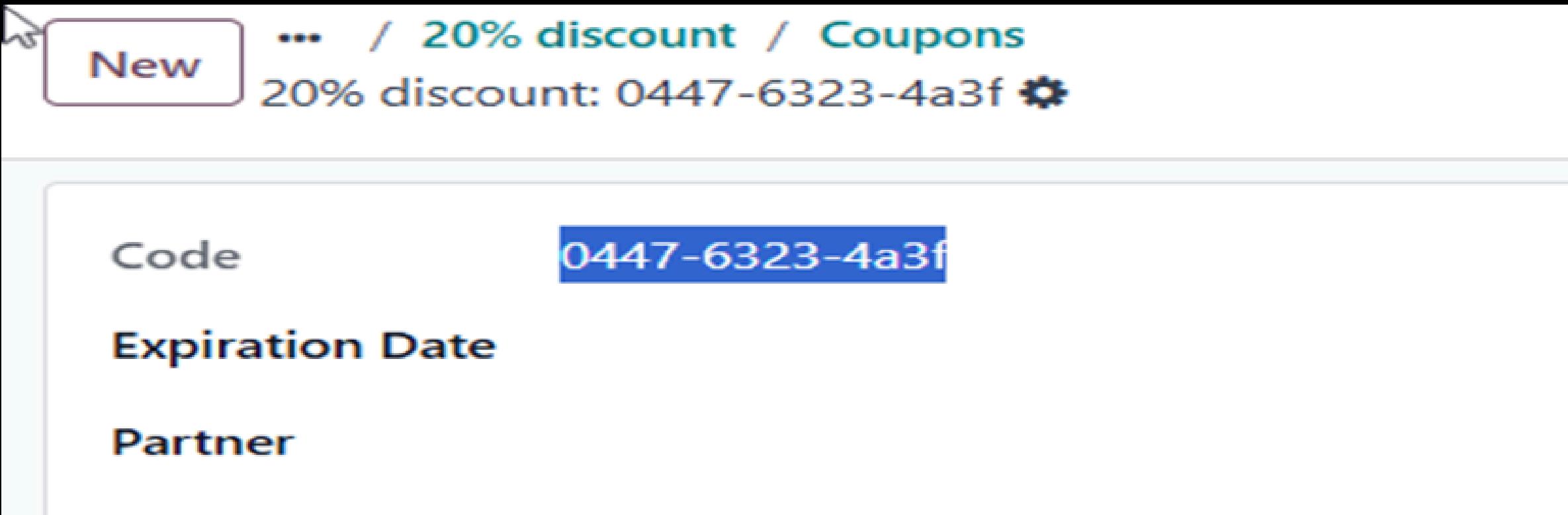
Untaxed Amount: 700.00 LE

Total: 700.00 LE

Margin: 400.00 LE (57.14%)

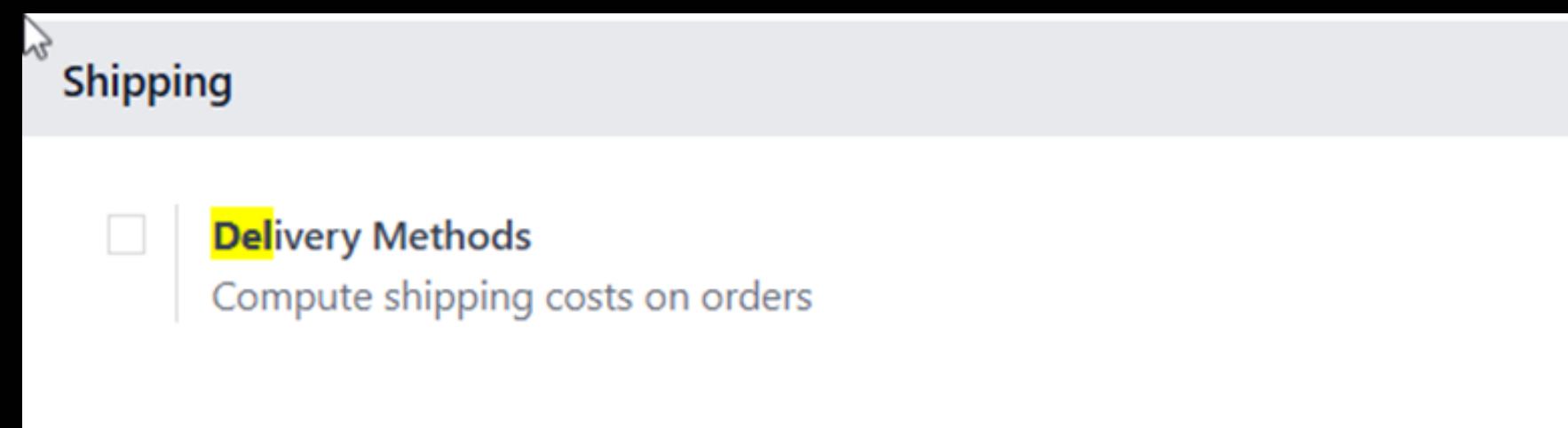
S00022

Customer Dalia Ahmed Cairo Egypt	Expiration ? 11/13/2024	Pricelist ? Default (EGP)	Payment Terms Immediate
<hr/>			
Order Lines	Optional Products	Other Info	
Product	Quantity	Unit Price Taxes	Disc.% Amount
Anastasia Beverly Hills Liquid Lipsticks	1.00	300.00	0.00 300.00 LE
Aveeno Daily Moisturizing Body Wash	1.00	400.00	0.00 400.00 LE
Anastasia Beverly Hills Liquid Lipsticks Free Product -	1.00	0.00 14%	100.00 0.00 LE
Add a product Add a section Add a note Catalog			
<hr/>			
Coupon Code Reward Discount	Untaxed Amount: 700.00 LE	VAT 14%: 0.00 LE	Total: 700.00 LE
<hr/>			
Terms and conditions...			
<hr/>			
Coupon Code Reward Discount	Untaxed Amount: 700.00 LE	VAT 14%: 0.00 LE	Total: 700.00 LE
<hr/>			
Margin: 300.00 LE (42.86%)			



- **Apply free shipping**

Activate delivery method from setting and create new



The screenshot shows the 'Delivery Method' configuration for 'cairo'. It includes fields for Provider (Fixed Price), Fixed Price (75.00 LE), Free if order amount is above (checkbox), Delivery Product (transportation), and Tracking Link (i.e. https://ekartlog). There are tabs for Availability and Description at the bottom.

The screenshot shows a dropdown menu for 'Reward Type' with options: Discount, Free Product, Discount, and Free Shipping. The 'Free Shipping' option is highlighted with a mouse cursor.

The screenshot shows a 'New' coupon creation interface for a VIP customer with ID 0448-85bb-4ac4. It includes fields for Code (0448-85bb-4ac4), Expiration Date, Partner, and Balance (1 Coupon point(s)).

New

Customer Mohamed Hossam
Damanhour
Egypt

Expiration? 11/13/2024

Pricelist? Default (EGP)

Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Anastasia Beverly Hills Liquid Lipsticks	2.00	300.00		0.00	600.00 LE 
Azzaro Chrome	2.00	200.00		0.00	400.00 LE 

Add a product Add a section Add a note Catalog

Coupon Code Reward Discount

Untaxed Amount: 1,000.00 LE

Total: 1,000.00 LE

Margin: 600.00 LE (60%)

S00023

Customer Mohamed Hossam
Damanhour
Egypt

Expiration? 11/13/2024

Pricelist? Default (EGP)

Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Anastasia Beverly Hills Liquid Lipsticks	2.00	300.00		0.00	600.00 LE 
Azzaro Chrome	2.00	200.00		0.00	400.00 LE 
Free shipping Free Shipping -	1.00	0.00		0.00	0.00 LE 

Add a product Add a section Add a note Catalog

Coupon Code Reward Discount

Untaxed Amount: 1,000.00 LE

Total: 1,000.00 LE

Margin: 600.00 LE (60%)





Accounting

ACCOUNTING MODULE

Accounting Module provides a complete financial management solution designed to simplify and automate accounting processes. This module helps businesses efficiently handle tasks such as invoicing, expense tracking and bank reconciliation

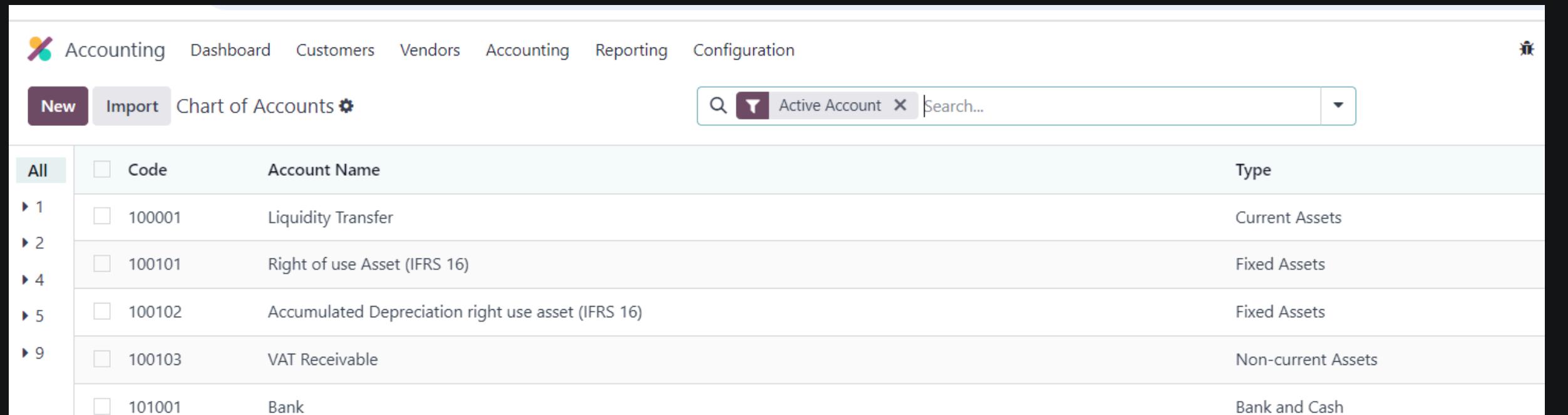
Key Features:

- Chart of Accounts: creating a new entry to the chart of accounts.
- Activation The Product Category feature
- Outstanding Accounts
- Invoicing & Payments: Create, send, and track invoices and payments seamlessly.
- Bank Reconciliation: Automate bank statement imports and reconcile accounts in real time.



1. Chart of Accounts

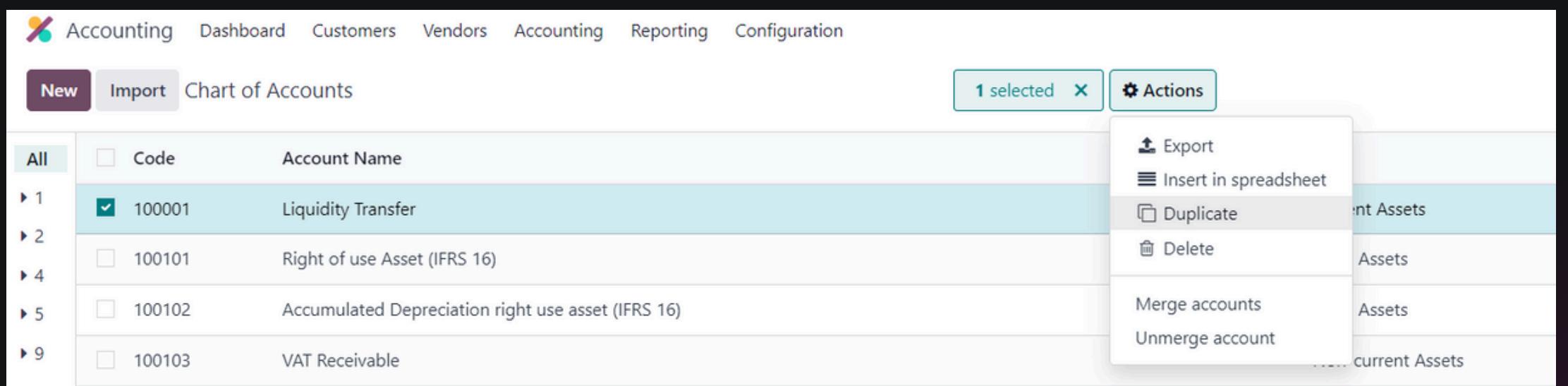
a. By selecting the new button, a new row will be created and details can be entered to the fields



The screenshot shows the Odoo Accounting module's Chart of Accounts list view. At the top, there are tabs for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, and Configuration. Below the tabs, there are buttons for New, Import, and a search bar labeled 'Active Account' and 'Search...'. The main area displays a table with columns for All, Code, Account Name, and Type. The data includes:

All	Code	Account Name	Type
1	100001	Liquidity Transfer	Current Assets
2	100101	Right of use Asset (IFRS 16)	Fixed Assets
4	100102	Accumulated Depreciation right use asset (IFRS 16)	Fixed Assets
5	100103	VAT Receivable	Non-current Assets
9	101001	Bank	Bank and Cash

b. By selecting duplicate button



The screenshot shows the Odoo Accounting module's Chart of Accounts list view. At the top, there are tabs for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, and Configuration. Below the tabs, there are buttons for New, Import, and a search bar labeled '1 selected' and 'Actions'. The main area displays a table with columns for All, Code, Account Name, and Type. The data includes:

All	Code	Account Name	Type
1	100001	Liquidity Transfer	Current Assets
2	100101	Right of use Asset (IFRS 16)	Assets
4	100102	Accumulated Depreciation right use asset (IFRS 16)	Assets
5	100103	VAT Receivable	Non-current Assets
9			

A context menu is open over the first row (Liquidity Transfer), showing options: Export, Insert in spreadsheet, Duplicate, Delete, Merge accounts, and Unmerge account. The 'Duplicate' option is highlighted.

2. Product Category Feature

The Product Category feature in Accounting Module allows businesses to organize and track their products in meaningful groups, linking each category directly to specific accounts for more precise financial tracking.

1-Change sales account

The screenshot shows the Odoo Accounting module interface. At the top, there's a navigation bar with links for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, and Configuration. On the right, there are user icons and a team name 'Edu - Cosmetics Team'. Below the navigation, a sub-menu for 'Invoices' is open, showing 'New', 'Draft Invoice', and other options. The main area is titled '1-Change sales account' and shows a 'Customer Invoice' in 'Draft' status. It details a customer named 'Amina Nour' from 'Shibin El Kom, Egypt'. The delivery address is also listed. The invoice date is set to 'Today' (10/17/2024), and the journal is 'Customer Invoices'. The 'Invoice Lines' tab is selected, showing one line for 'Benefit Cosmetics Hello Flawless Powder' with an account of '500001 Sales Account'. A large purple arrow points to the 'Account' field in this line. At the bottom, there are buttons for 'Add a line', 'Add a section', 'Add a note', and 'Catalog'.

Product	Account	Quantity	UoM	Price	Taxes	Amount
Benefit Cosmetics Hello Flawless Powder	500001 Sales Account	1.00	Units	200.00		200.00 LE

New Import Chart of Accounts

Search...

2-create new account

All	<input type="checkbox"/> Code	Account Name	Type
▶ 1	<input type="checkbox"/> 500001	Sales Account	Income
▶ 2	<input type="checkbox"/> 500002	Sales of I/C	Income
▶ 4	<input type="checkbox"/> 500003	Management Consultancy Fees	Income
▼ 5	<input type="checkbox"/> 500004	Sales from Other Region	Income
▶ 9	<input type="checkbox"/> 500005	Advertising Income	Income
	<input type="checkbox"/> 500006	Branding Income	Income
	<input type="checkbox"/> 500007	Space Rental Income	Income
	<input type="checkbox"/> 500008	Service Income	Income
	<input type="checkbox"/> 500009	Interest Revenue	Income
	<input type="checkbox"/> 500010	Capital Gain	Income
	<input type="checkbox"/> 500011	Gain On Difference Of Exchange	Income
	<input type="checkbox"/> 500013	Other Income	Income
	<input type="checkbox"/> 500014	Cash Discount Gain	Other Income

Accounting Dashboard Customers Vendors Accounting Reporting Configuration

Chart of Accounts
500015 powder sales

Code ? 500015

Account Name ? powder sales

Type ? Other Income **Allow Reconciliation ?**

Default Taxes ? **Deprecated ?**

Disallowable Expenses ? **Group ?**

Tags ?

Send message **Log note**

M Amr Abdelsatar - now • Cash Discount Gain (copy)

M Amr Abdelsatar - now Account created

3-create new product category

4-activate category that i made

New Products Charlotte Tilbury Airbrush Flawless Fini...

Replenish Print Labels

Product? ★ Charlotte Tilbury Airbrush Flawless Finish Setting Powder

Sales? Purchase?

General Information Attributes & Variants Sales Purchase Inventory Accounting

Product Type? Goods Sales Price? 1.00 LE per Units

Cost Removal Strategy? Standard Price Sales Taxes? 14% (= 1.14 LE Incl. Taxes)

Reserve Packagings? Reserve Only Full Packagings Cost? 0.00 LE per Units

Reserve Partial Packagings

Invoicing Policy? Ordered quantities Purchase Taxes? 14%

You can invoice goods before they are delivered.

Category? Powder Reference?

Barcode?

5-create new bill

New Invoices Draft Invoice

Confirm

Draft

Customer? Amina Saeed
Sharqia
Egypt

Delivery Address? Amina Saeed
Sharqia
Egypt

Invoice Date? Today
Due Date? 10/17/2024
Journal? Customer Invoices

Invoice Lines Journal Items Other Info

Product	Account	Quantity	UoM	Price	Taxes
Charlotte Tilbury Airbrush Flawless Finish Setting Powder	500015 Charlotte Til...	1.00			

Draft Posted Send message Log note Activities

M Amr Abdelsatar - now Creating a new record...

3.outstanding accounts

1-configuration then journal then cash outgoing payments then change manual payment

Payment Method	Name	Outstanding Payments accounts
Manual Payment	Manual Payment	105003 Outstanding Payments

2-create vendor bill

Product	Account	Quantity	UoM	Price	Taxes	Amount
Biolage Hydrasource Shampoo	400028 Others	10.00	Units	100.00		1,000.00 LE

3-pay to vendor

Account	Quantity	UoM	Price	Taxes	Amount
Biolage Hydrasource Shampoo	10.00	Units	100.00		1,000.00 LE

4- in payment

5-from payable to outstanding payments

PCSH1/2024/00001

Reference ? BILL/2024/10/0010 Accounting Date ? 10/17/2024
Journal ? Cash

Account	Partner	Label	Debit	Credit	Tax Grids
201002 Payables	12. Suez	Manual Payment: BILL/2024/10/0010	1,000.00 LE	0.00 LE	
105003 Outstanding Payments	12. Suez	Manual Payment: BILL/2024/10/0010	0.00 LE	1,000.00 LE	

6-check outstanding payment balance from general ledger

Oct 2024

Invoice Date	Communication	Partner	Debit	Credit	Balance
101003 QNB			0.00 LE	283,290.00 LE	-283,290.00 LE
102011 Accounts Receivable			27,360.00 LE	27,360.00 LE	0.00 LE
104041 VAT Input			34,790.00 LE	0.00 LE	34,790.00 LE
105001 Cash			0.00 LE	0.00 LE	27,360.00 LE
105003 Outstanding Payments			1,000.00 LE	1,000.00 LE	-1,000.00 LE
201002 Payables			0.00 LE	284,290.00 LE	0.00 LE
201017 VAT Output			0.00 LE	3,360.00 LE	-3,360.00 LE
400028 Others			249,500.00 LE	0.00 LE	249,500.00 LE
500001 Sales Account	Journal Items		0.00 LE	24,000.00 LE	-24,000.00 LE
Total			623,300.00 LE	623,300.00 LE	0.00 LE

7-check cash from dashboard

Transactions

Balance -283,290.00 LE

Cash

Transactions

Balance 27,360.00 LE
Payments -1,000.00 LE

8-manager reconcile payment

Journal Cash Search... 1-3 / 3 < >

Balance	26,360.00 LE	Reset	To Check	Create Bill	Internal Transfers	
10/15/2024 12. Suez vendor payment	-1,000.00 LE					
10/15/2024 Method Body Wash INV/2024/00001	25,650.00 LE					
10/15/2024 mennaamer204@gmail.com INV/2024/00002	1,710.00 LE					

Account Date Partner Debit Credit

105001 Cash 10/15/2024 12. Suez 1,000.00 LE
CSH1/2024/00003: vendor payment

105003 Outstanding Payments 10/15/2024 12. Suez 1,000.00 LE
PCSH1/2024/00001 (BILL/2024/10/0010): Manual Payment: BILL/2024/10/0010

Manual Operations Discuss

Partner 12. Suez Label Manual Payment: BILL/2024/10/0010

Account 105003 Outstanding Payments Amount 1,000.00 LE

9-vendor bill paid

Bills Search... 1-10 / 10 < >

Vendor	Bill Date	Due Date	Reference	Tax Excluded	Amount Due	Status
12. Suez	10/17/2024			-1,000.00 LE	0.00 LE	Paid
1. Cairo	10/14/2024			-1,000.00 LE	0.00 LE	Paid
10. Damanhour	10/14/2024			-12,500.00 LE	0.00 LE	Paid
11. Aswan	10/14/2024			20,000.00 LE	0.00 LE	Paid

10-make sure that outstanding balance = 0

Oct 2024

	Invoice Date	Communication	Partner	Debit	Credit	Balance
▶ 101003 QNB				0.00 LE	283,290.00 LE	-283,290.00 LE
▶ 102011 Accounts Receivable				27,360.00 LE	27,360.00 LE	0.00 LE
▶ 104041 VAT Input				34,790.00 LE	0.00 LE	34,790.00 LE
▶ 105001 Cash				27,360.00 LE	1,000.00 LE	26,360.00 LE
▶ 105003 Outstanding Payments				1,000.00 LE	1,000.00 LE	0.00 LE
▶ 201002 Payables				284,290.00 LE	284,290.00 LE	0.00 LE

4.Invoicing & Payments

Invoicing & Payments: Create, send, and track invoices and payments seamlessly.

This screenshot shows the Invoices list in the Odoo Accounting module. The interface includes a top navigation bar with links for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, and Configuration. On the right, there are user icons and a team section for 'Edu - Cosmetics Team' with member 'Amr Abdelsatar'. The main area displays a table of invoices with columns for Number, Customer, Invoice Date, Due Date, Tax Excluded, and Status. Two invoices are listed: one from 'mennaamer204@gmail.com' and another from 'Method Body Wash'. The total amount shown is 24,000.00 LE.

Number	Customer	Invoice Date	Due Date	Tax Excluded	Status
INV/2024/00002	mennaamer204@gmail.com	10/15/2024		1,500.00 LE	In Payment
INV/2024/00001	Method Body Wash	10/15/2024	Today	22,500.00 LE	Not Paid

1-uncollected Invoices

This screenshot shows the Bills list in the Odoo Accounting module. The interface is similar to the Invoices list, with a top navigation bar and a team section for 'Edu - Cosmetics Team'. The main area displays a table of bills with columns for Number, Vendor, Bill Date, Due Date, Reference, Tax Excluded, and Status. Ten bills are listed, all from different vendors and dated 10/14/2024, all marked as 'Yesterday'. The total amount shown is -248,500.00 LE.

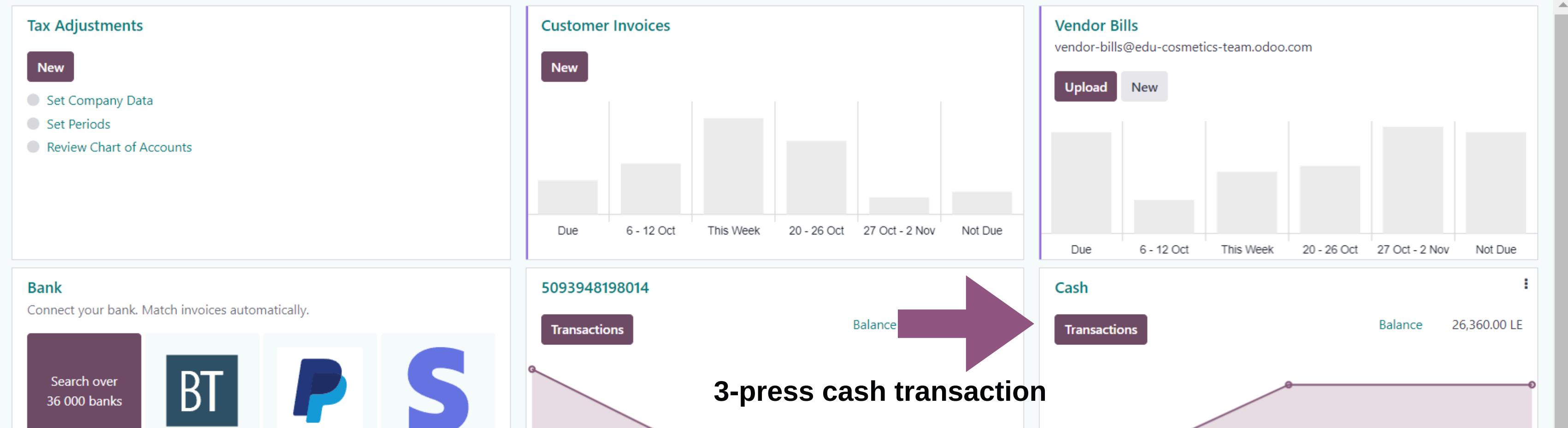
Number	Vendor	Bill Date	Due Date	Reference	Tax Excluded	Status
BILL/2024/10/0009	1. Cairo	10/14/2024	Yesterday		-1,000.00 LE	Not Paid
BILL/2024/10/0008	10. Damanhour	10/14/2024	Yesterday		-12,500.00 LE	Not Paid
BILL/2024/10/0007	11. Aswan	10/14/2024	Yesterday		-20,000.00 LE	Not Paid
BILL/2024/10/0006	15. Mansoura	10/14/2024	Yesterday		-125,000.00 LE	Not Paid
BILL/2024/10/0005	12. Suez	10/14/2024	Yesterday		-20,000.00 LE	Not Paid
BILL/2024/10/0004	1. Cairo	10/14/2024	Yesterday		-10,000.00 LE	Not Paid
BILL/2024/10/0003	1. Cairo	10/14/2024	Yesterday		-10,000.00 LE	Not Paid
BILL/2024/10/0002	10. Damanhour	10/14/2024	Yesterday		-40,000.00 LE	Not Paid
BILL/2024/10/0001	16. Kafr El Sheikh	10/14/2024	Yesterday		-10,000.00 LE	Not Paid

2-unpaid vendor bills

Dashboard

 Favorites
Search...

1-7 / 7



Journal Cash

4-press new transaction with the same amount

Reset	To Check	Account	Date	Partner	Debit	Credit
10/15/2024 12. Suez vendor payment	-1,000.00 LE	105001 Cash CSH1/2024/00002: INV/2024/00001	10/15/2024	Method Body Wash	25,650.00 LE	
10/15/2024 Method Body Wash INV/2024/00001	25,650.00 LE	102011 Accounts Receivable INV/2024/00001: INV/2024/00001	10/15/2024	Method Body Wash		25,650.00 LE
10/15/2024 mennaamer204@gmail.com INV/2024/00002	1,710.00 LE					

Invoices

New Upload Invoices 

Search...  

1-2 / 2     

<input type="checkbox"/> Number	Customer	Invoice Date	Due Date	Tax Excluded	Amount Due	Status	
<input type="checkbox"/> INV/2024/00002	mennaamer204@gmail.com	10/15/2024		1,500.00 LE	0.00 LE		
<input type="checkbox"/> INV/2024/00001	Method Body Wash	10/15/2024		22,500.00 LE	0.00 LE		

5-all invoices collected

6-accounts receivables balance

Oct 2024

	Invoice Date	Communication	Partner	Debit	Credit	Balance
► 101003 QNB				0.00 LE	283,290.00 LE	-283,290.00 LE
► 102011 Accounts Receivable				27,360.00 LE	0.00 LE	27,360.00 LE
► 104041 VAT Input				34,790.00 LE	0.00 LE	34,790.00 LE
► 105001 Cash				1,710.00 LE	0.00 LE	1,710.00 LE
► 201001 Bank Suspense Account				0.00 LE	1,710.00 LE	-1,710.00 LE
► 201002 Payables				283,290.00 LE	283,290.00 LE	0.00 LE
► 201017 VAT Output				0.00 LE	3,360.00 LE	-3,360.00 LE
► 400028 Others				248,500.00 LE	0.00 LE	248,500.00 LE
► 500001 Sales Account				0.00 LE	24,000.00 LE	-24,000.00 LE
Total				595,650.00 LE	595,650.00 LE	0.00 LE

New Upload Dashboard Bank Reconciliation

Journal 5093948198014 X Search...

1-12 / 12 < >

Balance		-283,290.00 LE
10/15/2024	16. Kafr El Sheikh	-11,400.00 LE
BILL/2024/10/0001		
10/15/2024	12. Suez	-22,800.00 LE
BILL/2024/10/0005		
10/15/2024	15. Mansoura	-92,500.00 LE
BILL/2024/10/0006		
10/15/2024	11. Aswan	-22,800.00 LE
BILL/2024/10/0007		
10/15/2024	1. Cairo	-11,400.00 LE
BILL/2024/10/0004		
10/15/2024	1. Cairo	-11,400.00 LE
BILL/2024/10/0003		
10/15/2024	10. Damanhour	-33,100.00 LE
BILL/2024/10/0002		
10/15/2024	10. Damanhour	-14,250.00 LE
BILL/2024/10/0008		
10/15/2024	10. Damanhour	-12,500.00 LE
سداد مورد دمنهور بالكامل		
10/15/2024	15. Mansoura	-50,000.00 LE
المستحقة, علما		

7-vendor payment transaction

Reset	To Check	Create Bill	Internal Transfers
Account	Date	Partner	Debit Credit
101003 QNB	10/15/2024	16. Kafr El Sheikh	11,400.00 LE
BNK2/2024/00012: BILL/2024/10/0001			
201002 Payables	10/15/2024	16. Kafr El Sheikh	11,400.00 LE
BILL/2024/10/0001: BILL/2024/10/0001			
Partner 16. Kafr El Sheikh Label BILL/2024/10/0001			
Account 101003 QNB Amount -11,400.00 LE			
Date 10/15/2024			
Notes			

8-all bills paid

New	Upload	Bills	Configuration	
	Number	Vendor	Bill Date Due Date Reference Tax Excluded Amount Due Status	
	BILL/2024/10/0009	1. Cairo	10/14/2024	-1,000.00 LE 0.00 LE
	BILL/2024/10/0008	10. Damanhour	10/14/2024	-12,500.00 LE 0.00 LE
	BILL/2024/10/0007	11. Aswan	10/14/2024	-20,000.00 LE 0.00 LE
	BILL/2024/10/0006	15. Mansoura	10/14/2024	-125,000.00 LE 0.00 LE
	BILL/2024/10/0005	12. Suez	10/14/2024	-20,000.00 LE 0.00 LE
	BILL/2024/10/0004	1. Cairo	10/14/2024	-10,000.00 LE 0.00 LE
	BILL/2024/10/0003	1. Cairo	10/14/2024	-10,000.00 LE 0.00 LE
	BILL/2024/10/0002	10. Damanhour	10/14/2024	-40,000.00 LE 0.00 LE
	BILL/2024/10/0001	16. Kafr El Sheikh	10/14/2024	-10,000.00 LE 0.00 LE
-248,500.00 LE 0.00 LE				

Accounting
Dashboard
Customers
Vendors
Accounting
Reporting
Configuration

3
Edu - Cosmetics Team
Amr Abdelsatar
edu-cosmetics-team

PDF
General Ledger

Search...
Oct 2024
All Journals
Posted Entries
In .LE
Settings

9-accounts payable balance=0

Oct 2024					
	Invoice Date	Communication	Partner	Debit	Credit
▶ 101003 QNB				0.00 LE	283,290.00 LE
▶ 102011 Accounts Receivable				27,360.00 LE	27,360.00 LE
▶ 104041 VAT Input				34,790.00 LE	0.00 LE
▶ 105001 Cash				27,360.00 LE	0.00 LE
▶ 201002 Payables				283,290.00 LE	283,290.00 LE
▶ 201017 VAT Output				0.00 LE	3,360.00 LE
▶ 400028 Others				248,500.00 LE	0.00 LE
▶ 500001 Sales Account				0.00 LE	24,000.00 LE
Total				621,300.00 LE	621,300.00 LE
					0.00 LE

5.Fixed Assets and Depreciation

Accounting Dashboard Customers Vendors Accounting Reporting Configuration

New Assets دوّلاب تخزين 2

Posted Entries 0

1 / Draft

Confirm Compute Depreciation

Asset Name دوّلاب تخزين 2

Asset Depreciation Board Bills

ASSET VALUES CURRENT VALUES

Original Value	1,000.00 LE	Not Depreciable Value ?	0.00 LE
Acquisition Date	10/25/2024	Book Value ?	1,000.00 LE
Asset Model	Furniture		
Asset Group			

دوّلاب تخزين 2

Asset Depreciation Board Bills

Depreciat. ^ Reference Depreciation Cumulative De... Depreciable V... Journal Entry

12/31/2024	دوّلاب تخزين 2: Depreciation	50.00 LE	50.00 LE	950.00 LE	/
12/31/2025	دوّلاب تخزين 2: Depreciation	200.00 LE	250.00 LE	750.00 LE	/
12/31/2026	دوّلاب تخزين 2: Depreciation	200.00 LE	450.00 LE	550.00 LE	/
12/31/2027	دوّلاب تخزين 2: Depreciation	200.00 LE	650.00 LE	350.00 LE	/
12/31/2028	دوّلاب تخزين 2: Depreciation	200.00 LE	850.00 LE	150.00 LE	/

**THANK'S FOR
WATCHING**

DEPI

