

Odoo 17 EE User Manual for master's in automotive

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1.Introduction

1.1 System Overview

- **Brief introduction to Odoo 17 EE**

Odoo 17 Enterprise Edition (EE) is a powerful and flexible business management software that integrates various applications to streamline operations across different departments. Known for its user-friendly interface and robust customization capabilities, Odoo allows businesses to tailor their workflows and functionalities according to specific needs. With features ranging from inventory management to CRM, Odoo provides an all-in-one solution that enhances efficiency and fosters growth.

- **Overview of Masters in Automotive's customized system**

Masters in Automotive, specializing in car oil changing, aims to leverage Odoo 17 EE to enhance their operational efficiency across their two branches in Egypt and three warehouses. The customized Odoo system will incorporate features designed specifically for their unique business model, such as tailored fields for customer profiles and automated workflows for sales and inventory management.

Key functionalities will include a comprehensive CRM for managing customer inquiries and sales pipelines, an efficient inventory system for tracking products across warehouses, and a user-friendly POS for retail operations. The integration of ecommerce capabilities is also planned for future growth, enabling customers to book appointments and purchase products online. Overall, the customized Odoo system will not only streamline current operations but also provide a scalable solution for Masters in Automotive as they expand their services, including potential outdoor offerings.

1.2 How to Use This Manual

Guide on Navigating the Manual

This manual is designed to assist users in effectively implementing and customizing Odoo 17 EE for Masters in Automotive. To navigate the manual, start with the table of contents, which outlines the key sections and workflows related to system setup, customization, testing, and deployment. Each section provides step by step instructions, accompanied by screenshots where applicable, to ease understanding. You can refer to the table of contents at any time for quick access to specific topics.

Explanation of Conventions Used

Throughout this manual, certain conventions will be used to enhance clarity and readability:

- **Bold Text:** Shows important terms or actions that require emphasis.
- *Italics:* Used for examples or to denote specific field names and values.
- **Bullet Points:** Help break down complex information into digestible items, making it easier to follow processes.
- **Numbered Lists:** Outline sequential steps in procedures to ensure a clear understanding of the workflow.

2. Getting Started

2.1 Logging into the System

To access the Odoo 17 EE system, follow these steps:

1. Open your web browser and enter the system URL provided by your administrator.
2. On the login page, enter your username and password.
3. Click the “Login” button to access the dashboard.

Security Best Practices:

To ensure the security of your account, always use a strong password that combines letters, numbers, and special characters. Enable two factor authentication if available and avoid sharing your login credentials with anyone.

2.2 User Interface Overview

Upon logging in, you will be greeted by the Odoo dashboard, which serves as your central hub for navigating the system.

Dashboard Overview: The dashboard displays key metrics and insights relevant to your role, allowing for quick access to valuable information.

Navigation Menu Overview: Found on the left side, the navigation menu provides links to various modules such as CRM, Sales, Inventory, and Accounting. You can expand or collapse this menu for easier navigation.

2.3 Customizing Your Personal Dashboard

Personalizing your dashboard enhances your workflow. Here’s how to customize it:

1. Click on the “Edit” button on the dashboard.
2. Add or remove widgets by dragging them to or from the dashboard area.
3. To set up shortcuts, hover over often used modules and click the star icon to mark them as favorites.

By customizing your personal dashboard, you can streamline your daily tasks and improve your overall efficiency within the Odoo system.

3.Customer Relationship Management (CRM)

3.1 Managing Leads and Opportunities

Effective lead management is crucial for driving sales. In Odoo 17 EE, you can easily create and track leads by navigating to the CRM module and clicking on the “Create” button. Fill in the relevant details, such as customer name and contact information. As leads progress, you can convert them into opportunities by selecting the “Convert to Opportunity” option, allowing for more focused tracking and management.

3.2 Using Unified Email for Customer Inquiries

Setting up a unified email system in Odoo centralizes customer inquiries, ensuring no communication is missed. To do this, go to the CRM settings and configure the unified email address where all inquiries will be directed. Once set up, you can manage incoming emails directly within Odoo. For responding to customer inquiries, simply click on the relevant email, draft your response, and send it directly from the platform, streamlining your communication process.

3.3 Managing Sales Teams by Location

Organizing your sales teams effectively enhances performance. In the CRM module, you can create sales teams based on branch locations. To do this, navigate to the “Sales Teams” section and click “Create.” Assign team members and set specific goals for each team. Leads and opportunities can then be assigned to the appropriate team by selecting the team’s name when creating or updating a lead. This structure facilitates better management and accountability across different locations.

4.Sales and Invoicing

4.1 Creating and Managing Quotations

Creating quotations in Odoo 17 EE is straightforward. Begin by navigating to the Sales module and clicking on “Create.” Fill in the customer details, product information, and pricing. Once completed, save the quotation. You can manage and track the status of each quotation through the "Quotations" list view, where you can easily see which are pending, accepted, or declined.

4.2 Managing Sales Orders

Once a quotation is accepted, you can convert it into a sales order with a single click. Navigate to the accepted quotation and select “Convert to Sales Order.” This will initiate the order fulfillment process, allowing you to track inventory and manage the delivery of products efficiently.

4.3 Issuing Invoices and Proforma Invoices

In Odoo, generating invoices is seamless. After creating a sales order, click on “Create Invoice” to generate a standard invoice and send it directly to the customer. For businesses that require proforma invoices, these can be generated from the quotation stage, allowing clients to review pricing before confirming orders.

4.4 Processing Various Payment Methods

Odoo supports multiple payment methods, including cash, cards, STC pay, and bank transfers. When recording a payment, select the appropriate method, ensuring accurate tracking. Payments can be reconciled against invoices within the system, simplifying financial management and maintaining accurate records.

4.5 Applying Discounts

Setting up discount policies in Odoo is easy. You can create global discount rules or apply discounts individually to quotations and sales orders. When creating a quotation, simply input the discount percentage in the designated field, ensuring pricing stays competitive while tracking profitability.

4.6 Managing Electronic Signature for Quotations

Odoo allows for the setup of signature functionality, streamlining the approval process. To enable this, navigate to the settings and activate the signature feature. When a quotation is ready for approval, clients can sign electronically, providing a quick and secure method for confirming agreements without the need for physical paperwork.

5. Purchasing

5.1 Supplier Management

Effective supplier management is essential for smooth purchasing operations. In Odoo 17 EE, you can easily add and manage supplier information by navigating to the Purchases module and selecting “Suppliers.” Here, you can input relevant details such as contact information and payment terms. Maintaining strong relationships with suppliers is key; regular communication and updates in the system help ensure collaboration and reliability.

5.2 Creating and Managing Purchase Orders

Creating purchase orders (POs) in Odoo is a straightforward process. Begin by selecting “Create Purchase Order” within the Purchases module. Fill in the supplier details, item descriptions, and quantities needed. Once created, you can track and manage the status of each PO through the list view, where you can monitor approvals, receipts, and payments.

5.3 Handling Multiple Currencies

Odoo supports multiple currencies, making it easier for businesses to operate internationally. To set this up, navigate to the settings and enable multiple currency support. When creating purchase orders, you can select the currency for each supplier, and Odoo will handle currency conversion automatically based on the latest exchange rates.

5.4 Managing Made-to-order (MTO) Products

For businesses dealing with made-to-order products, Odoo provides a robust system. You can set up MTO products by selecting the right route during product creation. This ensures that purchases are started only when there is a confirmed order, streamlining the production and buying processes.

5.5 Using Fixed Vendor Price Lists

Creating and keeping fixed vendor price lists helps standardize costs. In the Purchases module, you can set up these price lists, allowing for consistent pricing across purchase orders. When generating a PO, you can easily apply the relevant price list to ensure correct cost management.

5.6 Purchase Order Approval Process

Establishing an approval workflow for purchase orders is crucial for keeping control over spending. In Odoo, you can set up approval processes by defining who must approve POs at various thresholds. Once configured, users can give purchase orders for approval, ensuring that all purchases are vetted before processing. This structured approach helps manage budgets effectively while keeping oversight.

7.Point of Sale (POS)

7.1 Setting Up and Operating the POS System

Setting up the POS system in Odoo 17 EE begins with initializing the terminals. To do this, navigate to the POS module, select “Configuration,” and set up each terminal with specific settings such as location and user access. Daily procedures involve opening and closing the register, which includes checking cash balances and ensuring all sales are properly recorded at the end of each day.

7.2 Managing Products and Categories in POS

Organizing products effectively enhances the customer experience. In the POS module, you can create product categories to group related items, making them easier to find during sales. Adding or removing products is straightforward; simply navigate to the product list, and update as necessary to reflect current inventory.

7.3 Processing Sales and Payments

Completing a sale in the POS system is efficient. To process a transaction, scan or select the products, and then go ahead to checkout. Odoo allows you to manage various payment methods—cash, card, STC pay, and bank transfers—ensuring flexibility for customers. Simply select the payment method and confirm the transaction to complete the sale.

7.4 Managing Discounts and Loyalty Points

Discounts can be applied directly within the POS interface. When processing a sale, simply enter the discount percentage before finishing the transaction. Additionally, Odoo allows you to set up and manage loyalty programs to reward repeat customers. You can track points and apply them to future purchases, enhancing customer retention.

7.5 Printing Invoices

Configuring invoice printing in Odoo is essential for transaction records. You can set up the printer settings in the POS module to ensure invoices are printed automatically at the end of each sale. Generating and printing invoices is simple—just select the “Print Invoice” option after completing a sale, providing customers with a physical record of their purchase.

8.Accounting

8.1 Accounting Module Overview

Odoo’s accounting module provides a robust framework for managing financial operations. It streamlines processes such as invoicing, expense tracking, and financial reporting. Setting up the chart of accounts is a crucial first step, allowing businesses to categorize transactions effectively and comply with accounting standards.

8.2 Managing Accounts and Financial Records

In Odoo, recording transactions is seamless, enabling users to log sales, purchases, and other financial activities in real time. This ensures that financial records are always UpToDate. Additionally, the module simplifies the reconciliation of bank statements, allowing users to match recorded transactions with their bank statements efficiently, thereby maintaining accuracy and identifying discrepancies easily.

8.3 Generating Financial Reports

Generating financial reports is essential for informed decision-making. Odoo allows users to create profit and loss statements, providing insights into revenue and expenses over specific periods. Users can also generate balance sheets, offering a snapshot of the company’s financial health at any given time. These reports are vital for assessing performance and guiding strategic planning, ensuring that businesses are well positioned for growth.

9. Leave Management

9.1 Submitting Leave Requests

Odoo simplifies the process for employees to request time off. Employees can give their leave requests directly through the system, selecting from several types of leave, including annual, sick, and unpaid leave. This streamlined process ensures that requests are documented and easily accessible for review.

9.2 Approving Leave Requests

The approval workflow in Odoo involves shift managers and HR managers who review leave requests submitted by employees. Managers can easily access the requests, evaluate the reasons for absence, and either approve or reject them, ensuring that staffing needs are met while accommodating employee requests.

9.3 Tracking Different Types of Leave

Monitoring leave balances is crucial for effective workforce management. Odoo allows HR teams to track distinct types of leave taken by employees and their remaining balances. Additionally, users can generate detailed leave reports to analyze usage patterns, helping inform future staffing and policy decisions.

10. Custom Features

10.1 Custom Fields in Customer Profile

Odoo's customization capabilities enable businesses to enhance customer profiles with specific fields such as car models, car name, and oil change frequency (in kilometers). This tailored information allows for better service and personalized interactions with customers, ensuring their needs are met.

10.2 Additional Customizations via Odoo Studio

Odoo Studio provides the tools to implement further customizations tailored to business requirements. Users can create custom elements, change views, and automate workflows without extensive programming knowledge. This flexibility ensures that businesses can adapt the system to their unique processes and keep efficiency.

11. Reports and Analytics

11.1 Custom Dashboards

Odoo offers customizable dashboards that provide a visual overview of key performance indicators and metrics. Users can easily access and interpret dashboard data, enabling them to monitor business performance at a glance. Customizing dashboard views allows users to highlight the most relevant information for their specific roles, enhancing decision making capabilities.

11.2 Key Reports for Each Module

Each module in Odoo comes with essential reports that are crucial for tracking business operations. Users can generate these reports, which include sales performance, inventory levels, and financial summaries, providing insights into various aspects of the business. Understanding how to read and interpret these reports helps users make informed strategic decisions.

11.3 Creating and Customizing Reports

Creating custom reports in Odoo is a straightforward process. Users can follow simple steps to design reports that meet their specific needs, including selecting data fields and arranging layouts. Additionally, existing report templates can be modified, allowing businesses to tailor reports to their unique requirements while maintaining consistency in presentation.

12.Support and Assistance

12.1 Common Troubleshooting

Odoo provides guidance on common troubleshooting issues that users may meet, offering solutions for frequent problems. Basic system maintenance tips help ensure that the software runs smoothly, minimizing disruptions in daily operations.

12.2 How to Request Help

For added support, users can easily reach out for assistance. Odoo provides contact information for customer support, and users can give support tickets through the system. This structured process ensures that issues are addressed promptly, helping maintain productivity and user satisfaction.