

# GRADUATION PROJECT

# PRESENTATION

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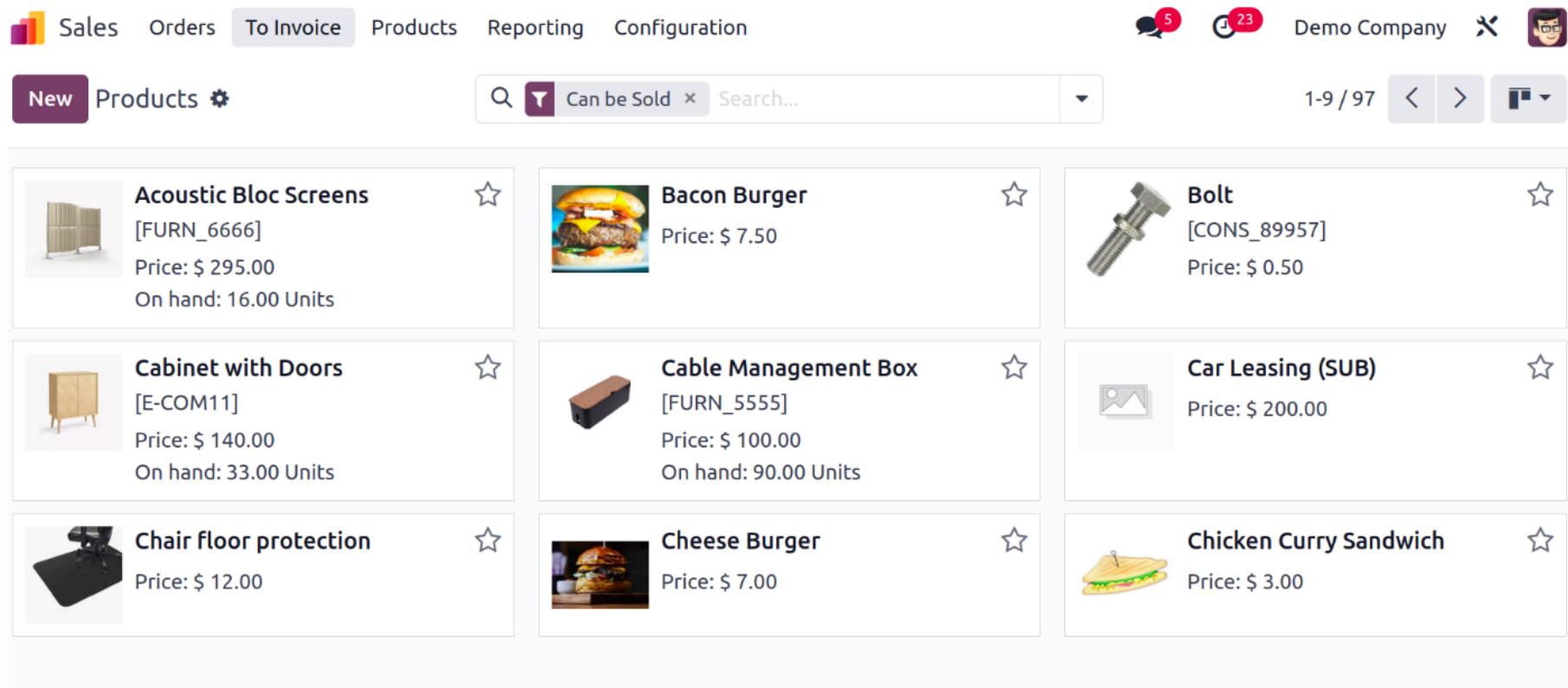
# Introduction

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 shows the Odoo Product Management Kanban view. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice (highlighted in grey), Products, Reporting, and Configuration. To the right of the tabs are icons for Chats (5 notifications), Calls (23 notifications), Demo Company, and a user profile. Below the navigation bar, there is a search bar with filters: 'Can be Sold' and 'Search...'. A date range '1-9 / 97' and navigation arrows are also present. The main area displays a grid of product cards:

Product	Description	Image	Price	On hand
Acoustic Bloc Screens	[FURN_6666] Price: \$ 295.00 On hand: 16.00 Units			
Bacon Burger	Price: \$ 7.50			
Bolt	[CONS_89957] Price: \$ 0.50			
Cabinet with Doors	[E-COM11] Price: \$ 140.00 On hand: 33.00 Units			
Cable Management Box	[FURN_5555] Price: \$ 100.00 On hand: 90.00 Units			
Chair floor protection	Price: \$ 12.00			
Cheese Burger	Price: \$ 7.00			
Car Leasing (SUB)	Price: \$ 200.00			
Chicken Curry Sandwich	Price: \$ 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 Sales Price ? \$1.00 (= \$ 1.15 Incl. Taxes)

Invoicing Policy ? Ordered quantities Customer Taxes ? 15% ×

Create on Order ? Nothing Cost ? 0.00 per Units

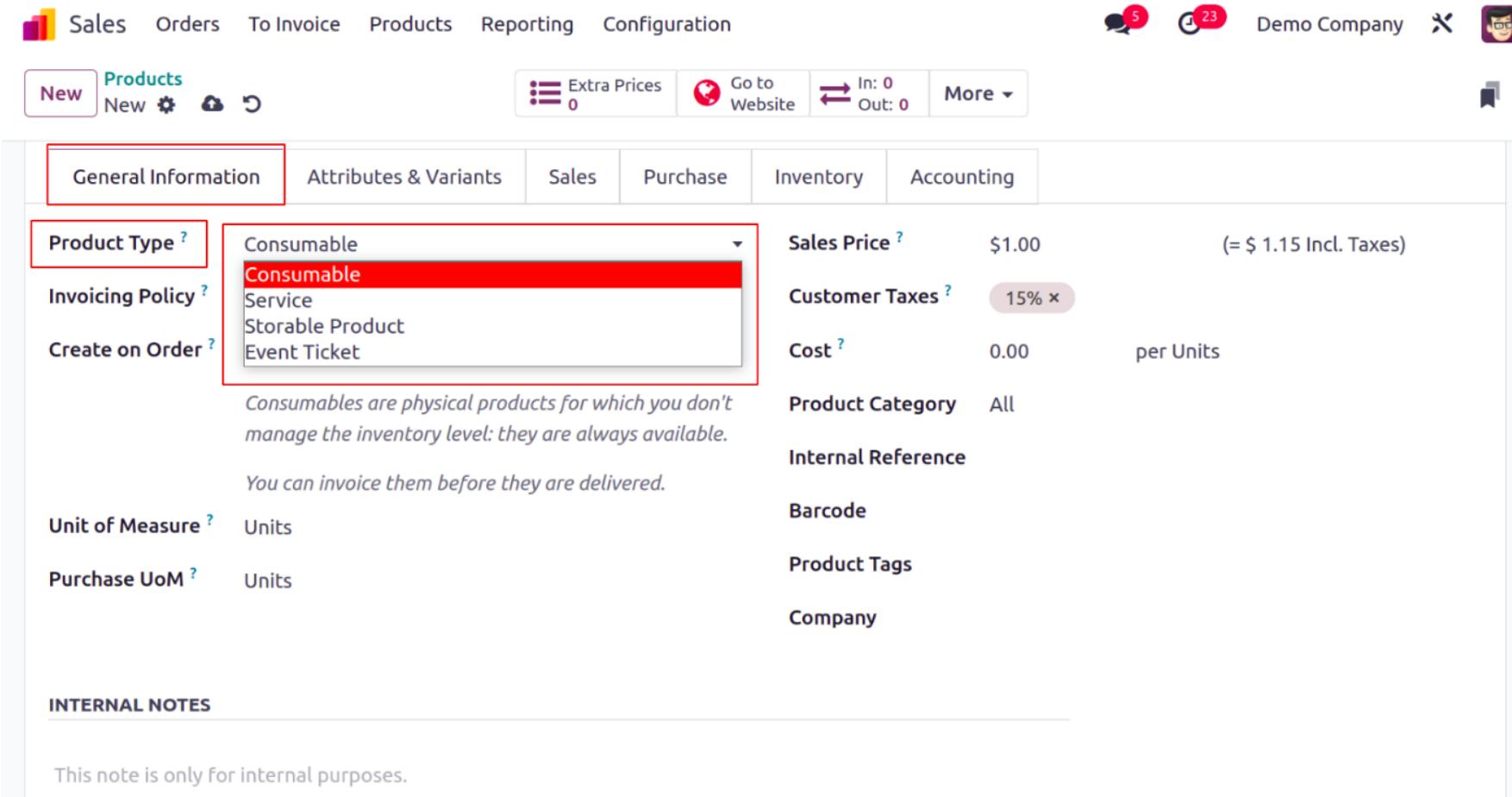
*Consumables are physical products for which you don't manage the inventory level: they are always available. You can invoice them before they are delivered.*

Unit of Measure ? Units 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

Products New 5 Extra Prices Go to Website In: 0 Out: 0 More

New 23 Demo Company X

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% ×

**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.

Products

New 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	Ordered quantities Delivered quantities	Customer Taxes ? 15% x			
Create on Order ?		Cost ? 0.00 per Units			
	Consumables are physical products for which you don't manage the inventory level: they are always available.	Product Category All			
	You can invoice them before they are delivered.	Internal Reference			
Unit of Measure ? Units		Barcode			
Purchase UoM ? Units		Product Tags			
		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.

Sales Orders To Invoice Products Reporting Configuration

New Products New  Go to Website Bill of Materials More

Extra Prices In: 0 Out: 0

Replenish Print Labels

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

Attribute Values

Add a line

Sales Orders To Invoice Products Reporting Configuration

New Products New  Go to Website Bill of Materials More

Extra Prices In: 0 Out: 0

General Information Attributes & Variants Sales Purchase Inventory Accounting

**UPSELL & CROSS-SELL**

**Optional Products?** Recommend when 'Adding to Cart' or quotation

**Accessory Products?** Suggested accessories in the eCommerce cart

**Alternative Products?** Displayed in bottom of product pages

**POINT OF SALE**

**Available in POS?**

**ECOMMERCE SHOP**

**Website?**

**Categories?**

Add a Media

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

The screenshot shows the Odoo interface for managing products. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, and a New button. On the right side of the header, there are notifications for 5 messages and 23 pending actions, along with the company name "Demo Company" and the user "Mitchell Admin" (demo\_saas-163\_302bf2c0ed...).

The main area displays a product configuration form. The tabs at the top are General Information, Attributes & Variants, Sales, Purchase (which is highlighted with a red border), Inventory, and Accounting. Below these tabs is a table for managing vendor information, with a red border around the entire row. The columns in the table are Vendor, Price, and Delivery. A button labeled "Add a line" is visible in the first column.

On the left side of the form, there is a section titled "VENDOR BILLS" with a red border. It contains fields for "Vendor Taxes" (set to 15%) and "Control Policy" (with options "On ordered quantities" and "On received quantities").

On the right side, there is a section titled "PURCHASE DESCRIPTION" with a red border. It contains a note: "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 shows the Odoo product management interface. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, and a New button. Below the navigation bar, there are icons for Extra Prices (0), Go to Website, In: 0 Out: 0, and More. On the right side of the header, it shows 'Demo Company', 'Mitchell Admin', and a user icon.

The main content area has tabs for General Information, Attributes & Variants, Sales, Purchase, **Inventory**, and Accounting. The **Inventory** tab is currently selected.

**OPERATIONS** section:

- Routes ?  Buy
- Manufacture
- [View Diagram](#)

**LOGISTICS** section:

Responsible ?	Mitchell Admin
Weight ?	0.00 kg
Volume ?	0.00 m <sup>3</sup>
Customer Lead Time ?	0.00 days
HS Code ?	
Origin of Goods ?	

**COUNTERPART LOCATIONS** section:

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.

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

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

**PAYABLES**

Expense Account? 600000 Expenses

Price Difference Account?

**INTRASTAT**

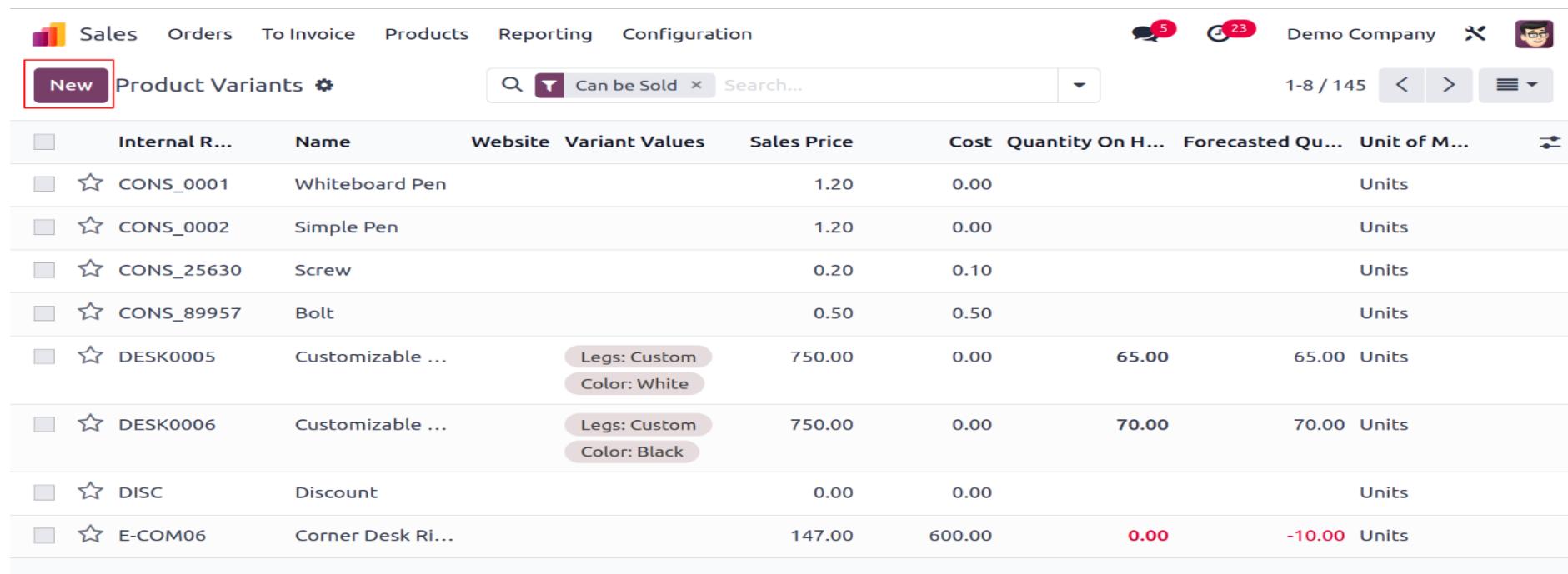
Commodity Code?

**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 .

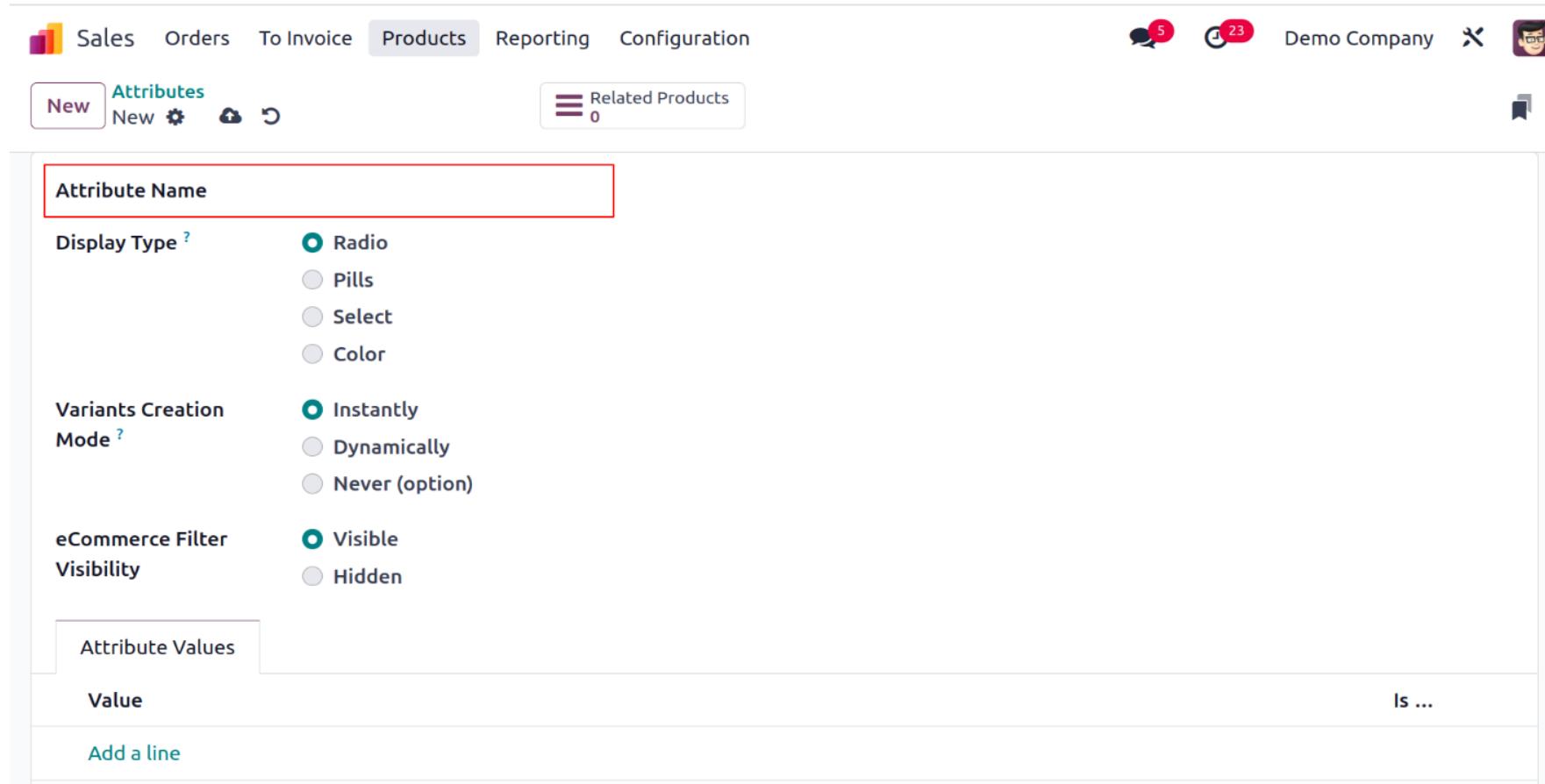
A list of already configured Product variants is available. You can quickly add a new one by using the NEW button.



The screenshot shows the Odoo 17 Sales module interface. The top navigation bar includes Sales, Orders, To Invoice, Products, Reporting, and Configuration. A notification bar indicates 5 messages and 23 pending actions. The current view is 'Product Variants'. A search bar filters results by 'Can be Sold' status. The main table lists product variants with columns for Internal Ref., Name, Website, Variant Values, Sales Price, Cost, Quantity On Hand, Forecasted Qu..., and Unit of M... . The 'Variant Values' column for the last two rows (Customizable Desk and Corner Desk) displays attribute combinations: 'Legs: Custom, Color: White' and 'Legs: Custom, Color: Black' respectively. The 'Sales Price' for the Customizable Desk variants is 750.00, while for the Corner Desk it is 147.00. The 'Cost' for the Customizable Desk variants is 600.00, while for the Corner Desk it is 0.00. The 'Quantity On Hand' for the Customizable Desk variants is 65.00, while for the Corner Desk it is -10.00. The 'Forecasted Qu...' and 'Unit of M...' columns are partially visible.

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.



Sales Orders To Invoice Products Reporting Configuration

5 23 Demo Company 

New Attributes New   

Related Products 0 

Attribute Name

Display Type ?  Radio  Pills  Select  Color

Variants Creation Mode ?  Instantly  Dynamically  Never (option)

eCommerce Filter Visibility  Visible  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.

The screenshot shows the Odoo 17 Sales Settings interface. The top navigation bar includes links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a notification center with 5 messages and 23 notifications. The user is logged in as 'Demo Company'.

The left sidebar lists various modules: General Settings, CRM, Sales (selected), Rental, Website, Purchase, Inventory, Manufacturing, Accounting, and Project.

The main content area is titled 'Pricing'. It contains several configuration items:

- Discounts**: Grant discounts on sales order lines.
- Pricelists**: Set multiple prices per product, automated discounts, etc. This section is highlighted with a red border.
  - Multiple prices per product
  - Advanced price rules (discounts, formulas)
  - [→ Pricelists](#)
- Discounts, Loyalty & Gift Card**: Manage Promotions, coupons, loyalty cards, Gift cards & eWallet.
- Margins**: Show margins on orders.

At the bottom, there are 'Save' and 'Discard' buttons, and a search bar.

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.

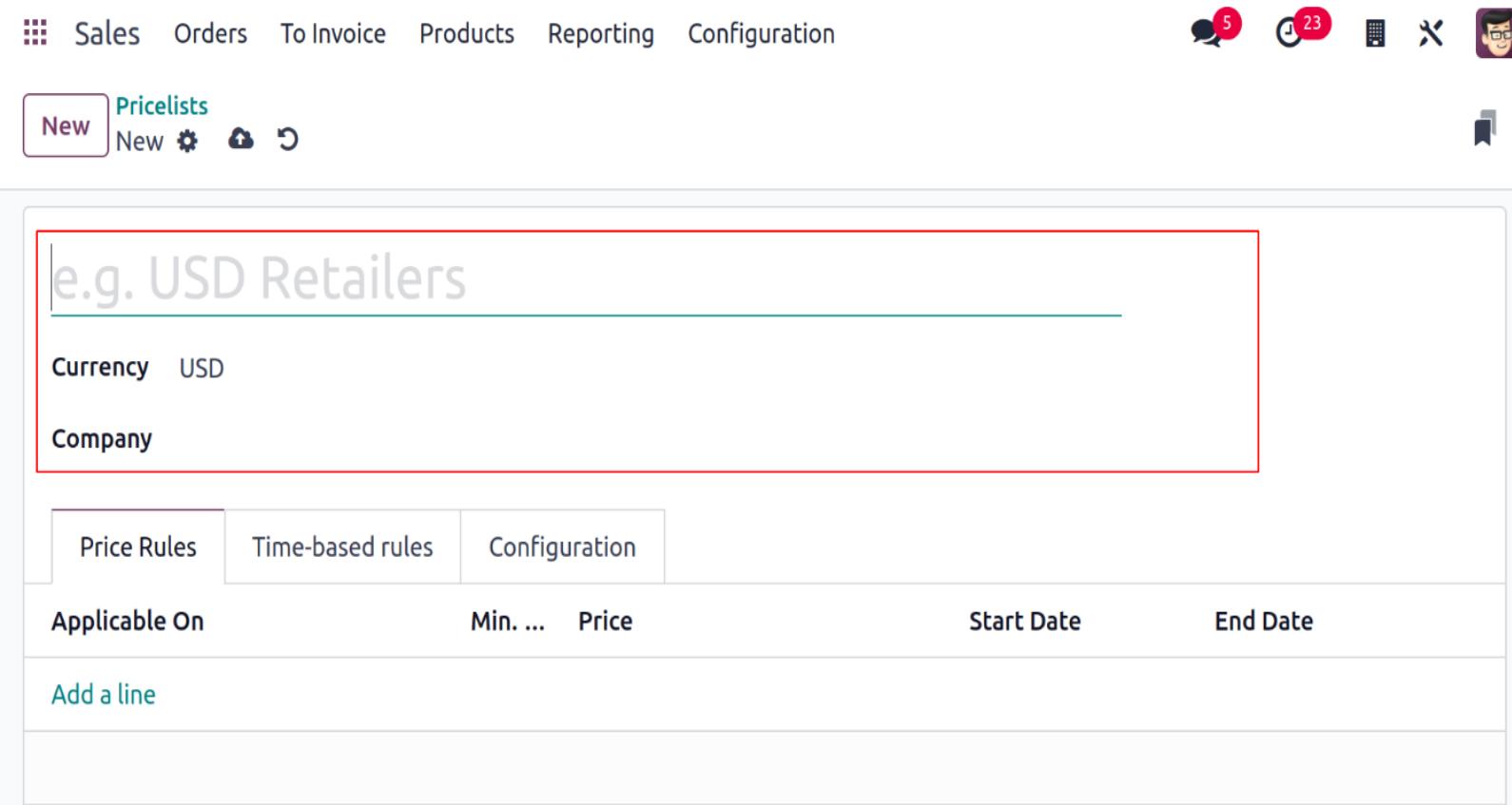
The screenshot shows the Odoo 17 Sales interface. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice, Products (which is highlighted with a red box), Reporting, and Configuration. Below the navigation bar, there are notifications for 5 messages and 23 calls, and a company name "Demo Company". The main content area has a sidebar with "Quotations" and a gear icon. A dropdown menu is open under "Quotations" with options: Products, Product Variants, Pricelists (which is also highlighted with a red box), Discount & Loyalty, and Gift cards & eWallet. The main content area contains four sections: "Company Data", "Quotation Layout", "Order Confirmation", and "Sample Quotation". Below these sections is a table listing sales orders. The table has columns: Number, Creation Date, Customer, Website, Salesperson, Activities, Company, Total, and Status. The table lists five entries:

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

The total value for all orders is \$ 31,339.80.

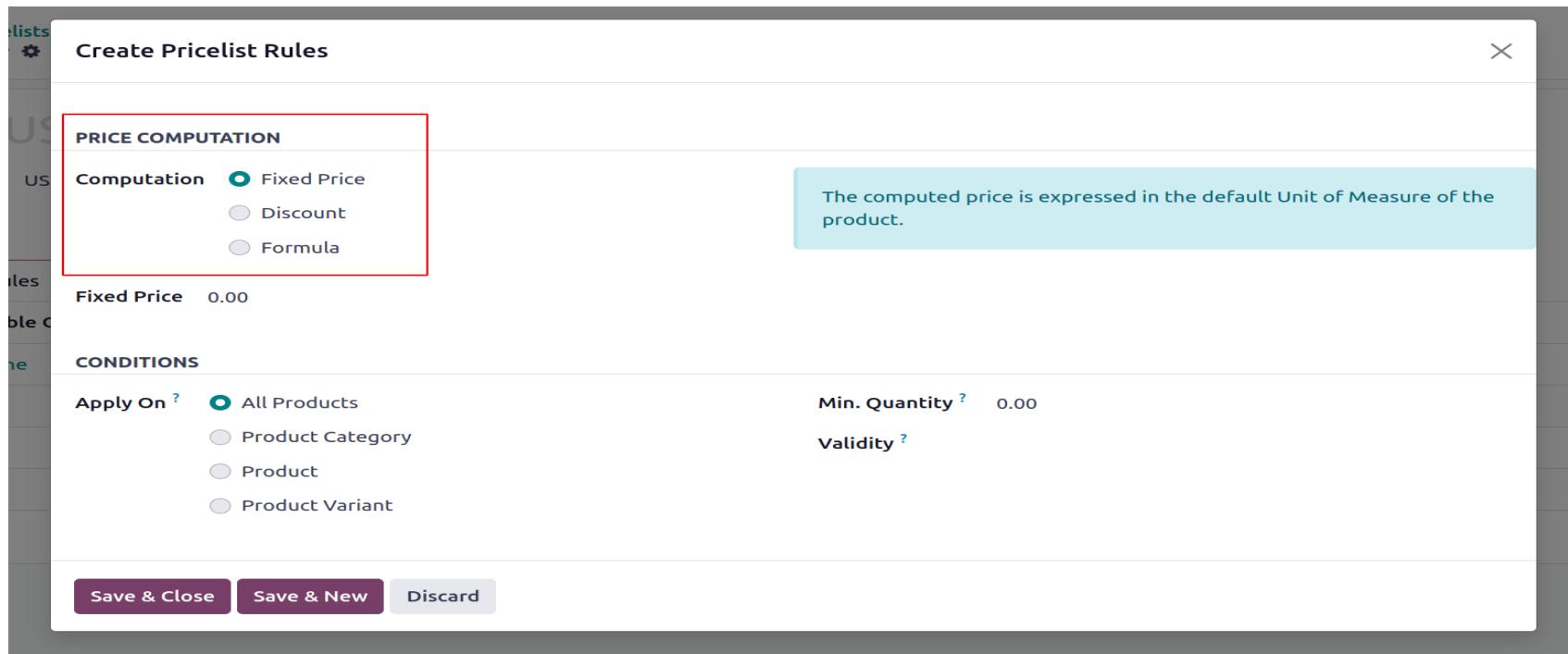
## Advanced Price Rules

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.



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.



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.

The screenshot shows the Odoo Pricelists module. At the top, there is a navigation bar with icons for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user menu for Mitchell Admin. Below the navigation bar, there are buttons for New, Pricelists, and other actions. The main area has a heading "e.g. USD Retailers". It includes fields for Currency (USD) and Company (Demo Company). A tab bar at the top right includes Price Rules, Time-based rules (which is highlighted with a red border), and Configuration. Below this, there is a table with columns for Products, Variants, Period, and Price. One row is shown for "Office Cleaning Service (SUB)" with a monthly period and a price of \$ 400.00. At the bottom, there is a button labeled "Add a line".

Products	Variants	Period	Price
Office Cleaning Service (SUB)		Monthly	\$ 400.00 <span style="color: red;">Delete</span>

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 Odoo Pricelists configuration screen. At the top, there are navigation links: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user menu with 5 notifications, Demo Company, Mitchell Admin, and session details.

The main area has tabs: New, Pricelists (selected), New, and a gear icon. A placeholder text 'e.g. USD Retailers' is visible.

Below the tabs, there are fields for Currency (USD) and Company (with a question mark). There are three tabs at the bottom: Price Rules, Time-based rules, and Configuration (selected).

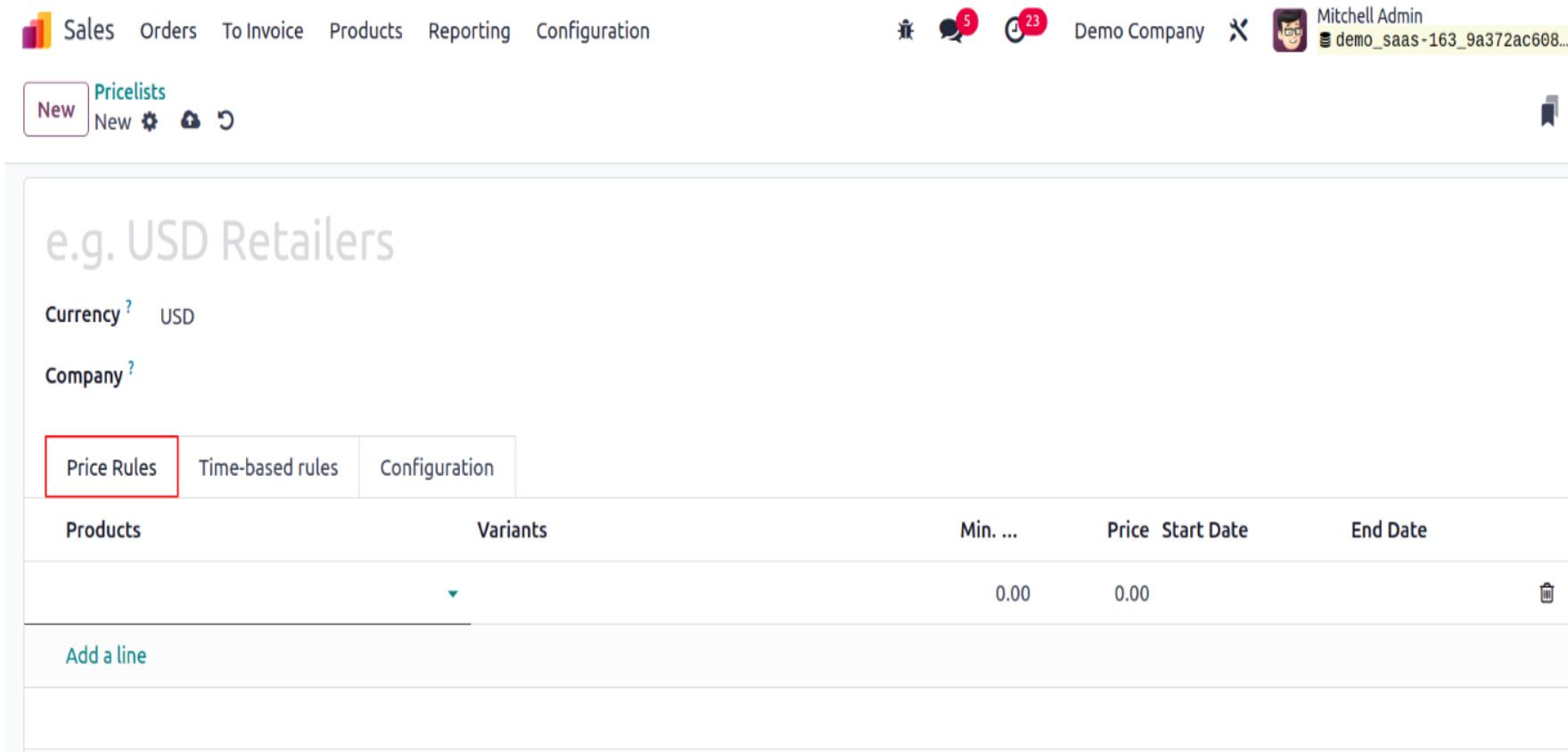
The Configuration tab contains two main sections:

- AVAILABILITY**: A section for 'Country Groups' with a question mark. It includes a red-bordered box for 'DISCOUNTS'.
- WEBSITE**: A section for 'Website' (My Website), 'Selectable' (unchecked), 'E-commerce', and 'Promotional Code'.

**DISCOUNTS** (red-bordered box):  
Discount Policy:  
 Discount included in the price  
 Show public price & discount to the customer

## 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.



The screenshot shows the Odoo Pricelists module. At the top, there is a navigation bar with icons for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user profile for Mitchell Admin. Below the navigation bar, there is a toolbar with buttons for New, Pricelists, and other actions. The main area is titled "e.g. USD Retailers". It has fields for Currency (USD) and Company (Demo Company). A tab bar at the top of the main area includes "Price Rules" (which is highlighted with a red border), "Time-based rules", and "Configuration". The "Price Rules" section contains a table with columns: Products, Variants, Min. ..., Price, Start Date, and End Date. There is one row in the table with values: a dropdown menu for Products, a dropdown menu for Variants, 0.00 for Min. ..., 0.00 for Price, and an empty field for Start Date and End Date. A trash can icon is in the End Date column. Below the table is a button labeled "Add a line".

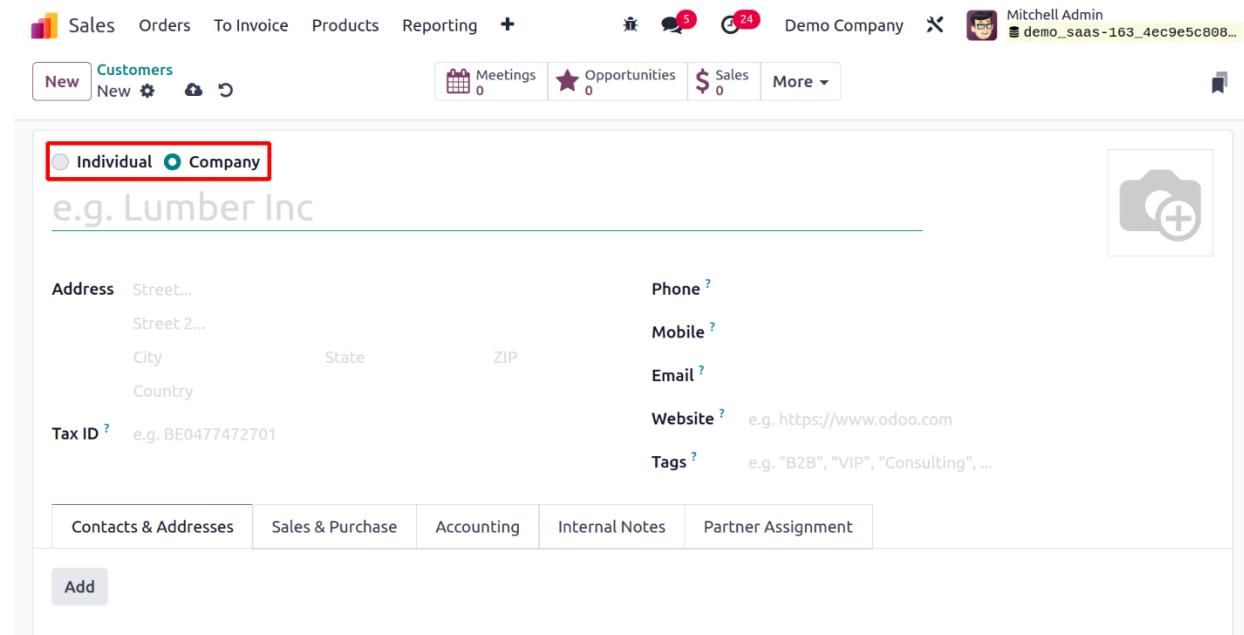
## Customers

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

The screenshot shows the Odoo 17 Sales module interface. At the top, there is a navigation bar with tabs: Sales, Orders (which is highlighted with a red box), To Invoice, Products, Reporting, and Configuration. Below the navigation bar, there are several icons: a person icon, a speech bubble with '5' notifications, a clock with '24' notifications, a document icon, a close button, and a user profile icon. A search bar and a 'My' dropdown are also present. A dropdown menu is open from the 'Orders' tab, showing options: New, Quotations, Orders, Sales Teams, and Customers (which is also highlighted with a red box). The main content area has a header with four sections: Company Data, Quotation Layout, Order Confirmation, and Sample Quotation. Below this, there is a message: "Set your company's data for documents. Customize the look of your quotations. Choose between electronic signatures or online payments." It includes buttons for "Let's start!", "Customize", "Set payments", and "Send sample". At the bottom, there is a table listing two sales orders:

Number	Creation Date	Customer	Website	Salesperson	Activities	Comments	Total	Status
S00061	08/18/2023 0€	Deco Addict		Mitch...	(clock)	Demo Com...	\$ 1,552.50	Sales Order
S00060	08/18/2023 0€	Deco Addict		Mitch...	(clock)	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.



The screenshot shows the Odoo customer creation interface. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, and a New button highlighted in red. Below the navigation bar is a secondary header with tabs for Customers, New, and More. To the right of the tabs are icons for Meetings (0), Opportunities (0), Sales (\$0), and a camera icon with a plus sign. The main form area has a title "e.g. Lumber Inc." and a radio button group for "Individual" (unchecked) and "Company" (checked). The company section includes fields for Address (Street, Street 2, City, State, ZIP), Tax ID (e.g. BE0477472701), Phone, Mobile, Email, Website (e.g. https://www.odoo.com), and Tags (e.g. "B2B", "VIP", "Consulting"). Below the form is a horizontal tab bar with five options: Contacts & Addresses, Sales & Purchase, Accounting, Internal Notes, and Partner Assignment. A large "Add" button is located at the bottom left of the form area.

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.

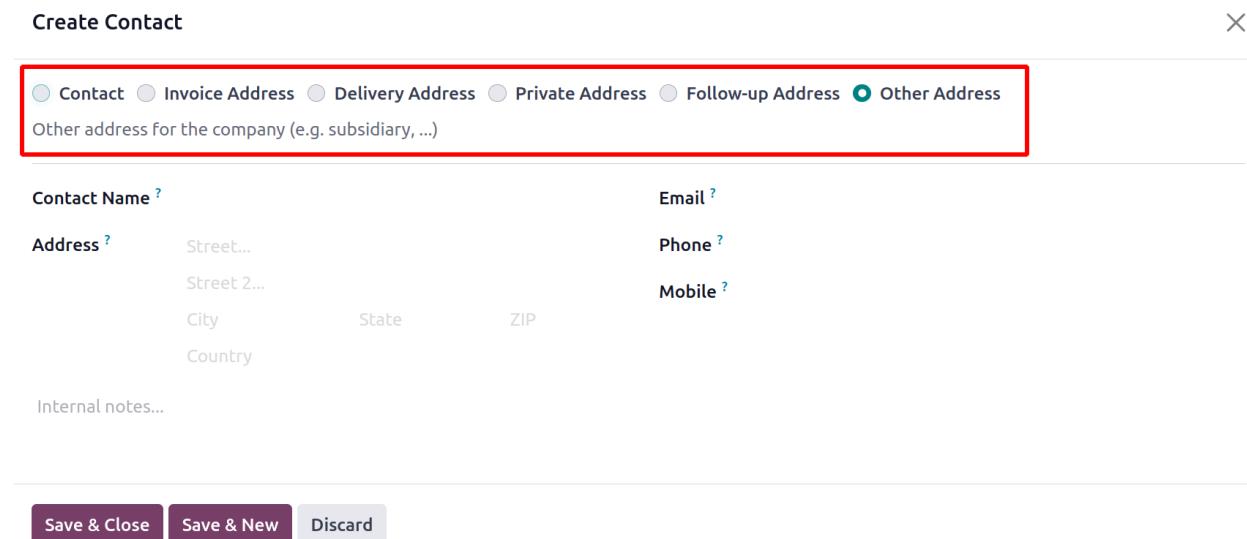
Create Contact X

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... Phone ?  
Street 2...  
City State ZIP  
Country

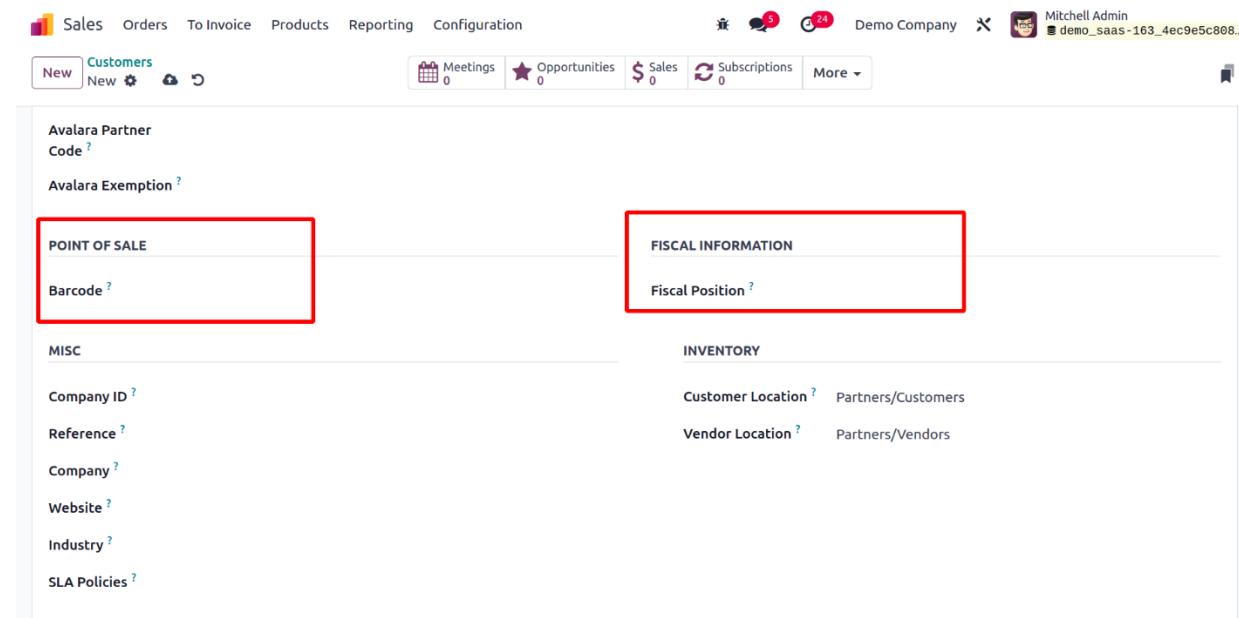
Internal notes...

**Save & Close** **Save & New** **Discard**

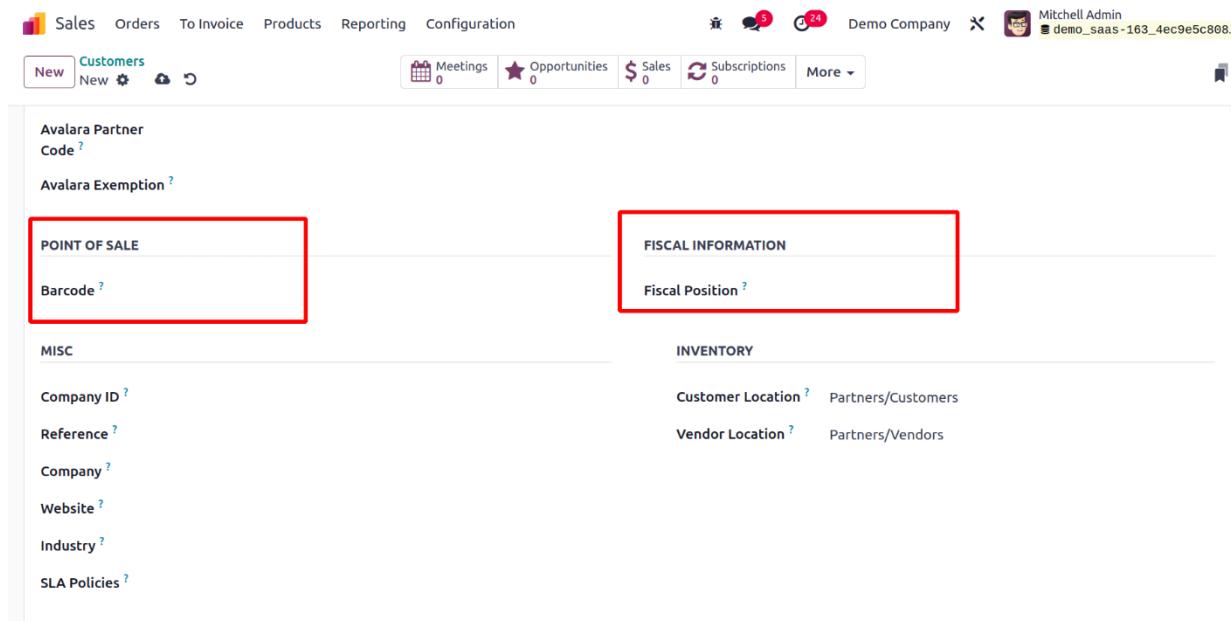


Under the Sales & Purchase tab, you can configure details for sales and purchase operations with the customer. Assign a Salesperson and Sales Team, set a specific Payment Period for invoices, and provide a unique Price List. Enter the Avalara Code, Partner Code, and Exemption. You can also specify the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

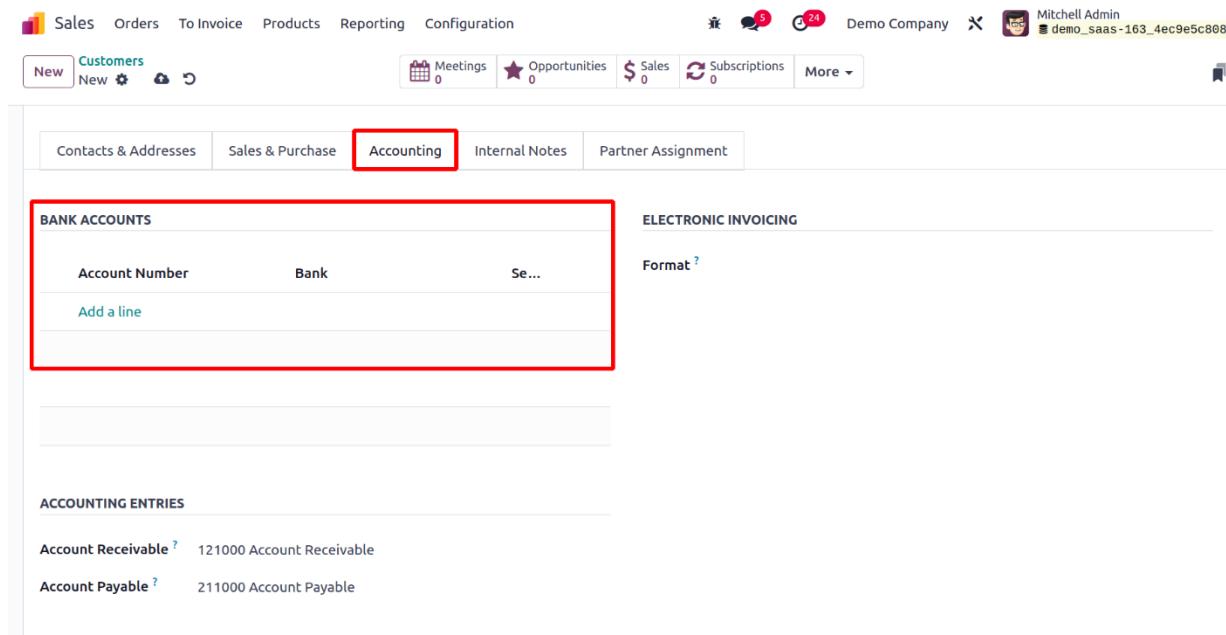
In the Purchase tab, select preferred Payment Terms for vendor bills. Specify the preferred Payment Mode and enable receipt reminders for confirming receipt dates. The Supplier Currency will be used for purchases from the current partner.



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.



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.



The screenshot shows the Odoo interface for managing customer accounting. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user profile for Mitchell Admin. Below the navigation bar, there is a header with sections for Meetings, Opportunities, Sales, Subscriptions, and More. The main content area is titled 'Customers' and shows tabs for Contacts & Addresses, Sales & Purchase, Accounting (which is highlighted with a red box), Internal Notes, and Partner Assignment. The 'Accounting' tab is further divided into two sections: 'BANK ACCOUNTS' and 'ELECTRONIC INVOICING'. The 'BANK ACCOUNTS' section contains columns for Account Number, Bank, and Se..., with a button labeled 'Add a line' for adding new entries. The 'ELECTRONIC INVOICING' section includes a 'Format' dropdown. At the bottom of the screen, there is a section titled 'ACCOUNTING ENTRIES' which lists 'Account Receivable' as 121000 Account Receivable and 'Account Payable' as 211000 Account Payable.

Account Number	Bank	Se...
Add a line		

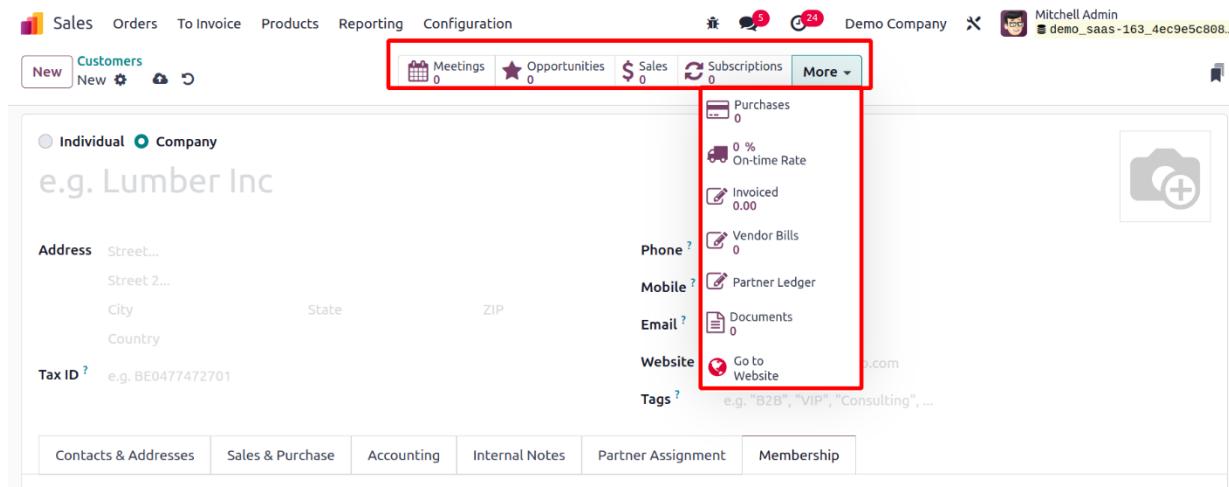
**ACCOUNTING ENTRIES**

Account Receivable ? 121000 Account Receivable

Account Payable ? 211000 Account Payable

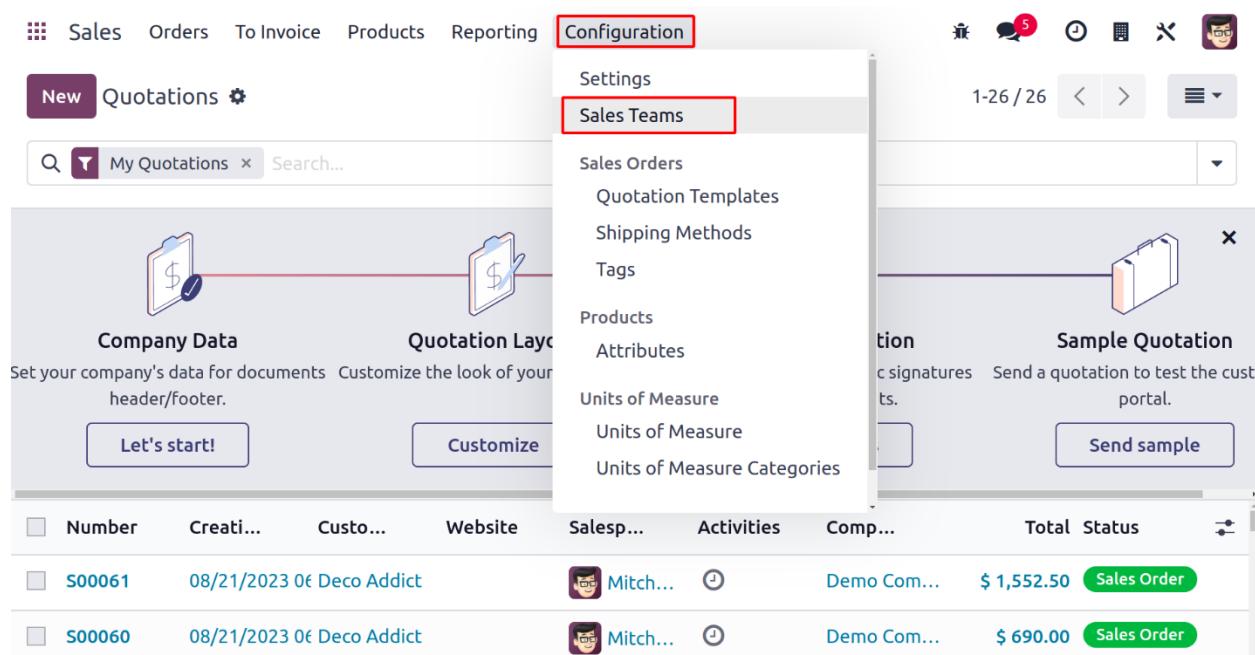
The Associate Member box allows you to link a member to the customer's membership and displays their current membership status. You can purchase a membership using the "Buy Membership" button, which shows details like Join Date, Membership, Price, Invoice, and Status.

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.

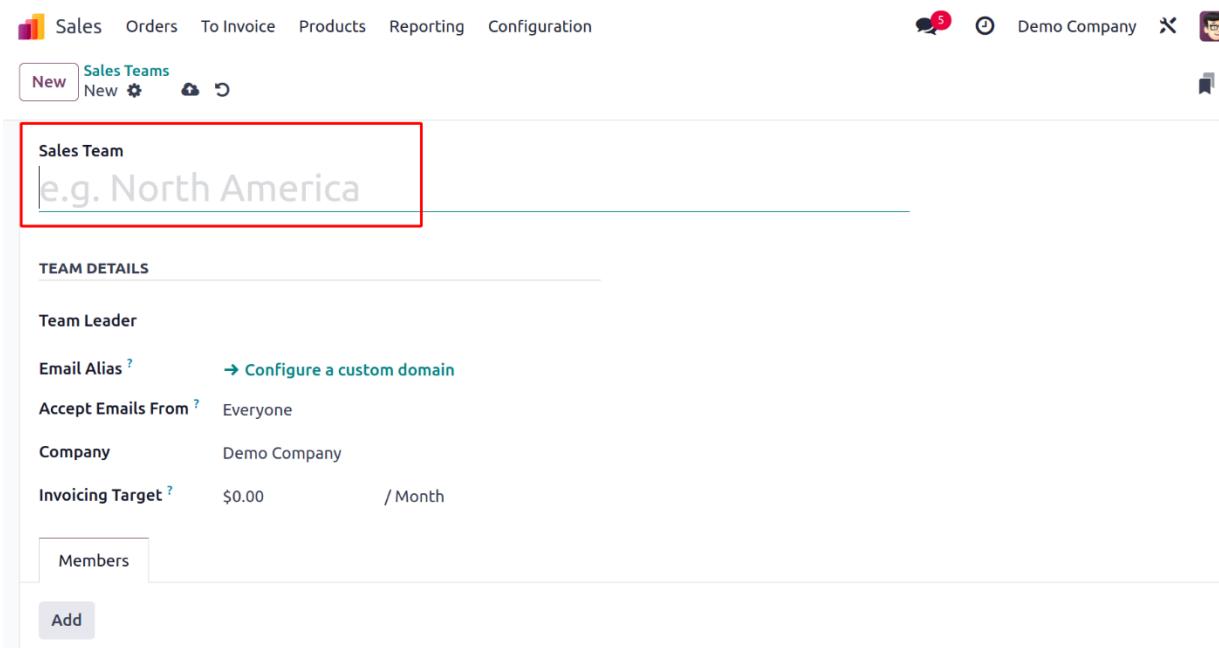


## Sales Team

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



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 x

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 shows the Odoo 17 Sales module interface. At the top, there is a navigation bar with tabs: Sales, Orders (which is highlighted in red), To Invoice, Products, Reporting, Configuration, and a user profile for Mitchell Admin. Below the navigation bar, there is a search bar with the placeholder "My Quotations" and a dropdown menu labeled "Search...". To the right of the search bar are buttons for page navigation (1-5 / 26) and a list view icon.

On the left side, there is a sidebar with a "New" button and a "Quotations" button (also highlighted in red). The sidebar also includes links for "Orders", "Sales Teams", and "Customers". Below the sidebar, there are four cards:

- Company Data**: Set your company's data for documents header/footer. Buttons: "Let's start!" and "Customize".
- Quotation Layout**: Customize the look of your quotations. Buttons: "Customize" and "Set payments".
- Order Confirmation**: Choose between electronic signatures or online payments. Buttons: "Set payments" and "Send sample".
- Sample Quotation**: Send a quotation to test the customer portal. Button: "Send sample".

The main area displays a list of quotations. The columns are: Number, Creation Date, Customer, Webs..., Salesperson, Activiti..., Company, Total, and Status. The status column contains green buttons labeled "Sales Order".

Number	Creation Date	Customer	Webs...	Salesperson	Activiti...	Company	Total	Status
S00061	08/21/2023 06:34:37	Deco Addict		Mitchell Ad...	(clock)	Demo Company	\$ 1,552.50	<button>Sales Order</button>
S00060	08/21/2023 06:34:37	Deco Addict		Mitchell Ad...	(clock)	Demo Company	\$ 690.00	<button>Sales Order</button>
S00058	08/21/2023 06:34:37	Gemini Furniture		Mitchell Ad...	(clock)	Demo Company	\$ 8,914.80	<button>Sales Order</button>
S00057	08/21/2023 06:34:37	Gemini Furniture		Mitchell Ad...	(clock)	Demo Company	\$ 20,182.50	<button>Sales Order</button>
S00040	08/21/2023 06:34:37	YourCompany, Jo...		Mitchell Ad...	(clock)	Demo Company	\$ 69.00	<button>Sales Order</button>

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.

The screenshot shows the Odoo Sales module interface for creating a new quotation. The top navigation bar includes links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user menu for 'Mitchell Admin'. Below the navigation is a toolbar with 'New' (highlighted in pink), 'Quotations' (selected), 'Send by Email', 'Confirm', and 'Preview' buttons. A breadcrumb navigation bar shows 'Quotation' (highlighted in blue), 'Quotation Sent', and 'Sales Order'. The main area is titled 'New' and contains fields for 'Customer' (dropdown with placeholder 'Type to find a customer...'), 'Expiration' (set to 09/20/2023), 'Quotation Date' (set to 08/21/2023 16:23:00), 'Recurrence' (disabled), 'Quotation Template' (set to 'Default Template'), 'Pricelist' (disabled), and 'Payment Terms' (disabled). Below these fields is a table header with columns: Order Lines, Product, Descr..., Quan..., UoM, Packa..., Packa..., Unit P..., Taxes, Disc.%, and Tax excl. At the bottom of the table area are buttons for 'Add a product', 'Add a section', 'Add a note', and 'Catalog'.

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.

The screenshot shows the Odoo Sales Quotations interface. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user menu for 'Mitchell Admin'. Below the navigation bar, there is a toolbar with buttons for New, Quotations, and other actions. The main area is titled 'Quotation Template' and shows tabs for Default Template, Pricelist, and Payment Terms. A table header for 'Order Lines' is visible, with columns for Product, Description, Quantity, UoM, Packag..., Packag..., Unit P..., Taxes, Disc.%, and Tax excl. Below the table, there are buttons for Add a product, Add a section, Add a note, and Catalog. At the bottom, there are links for Terms & Conditions and a Total amount of \$ 0.00.

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

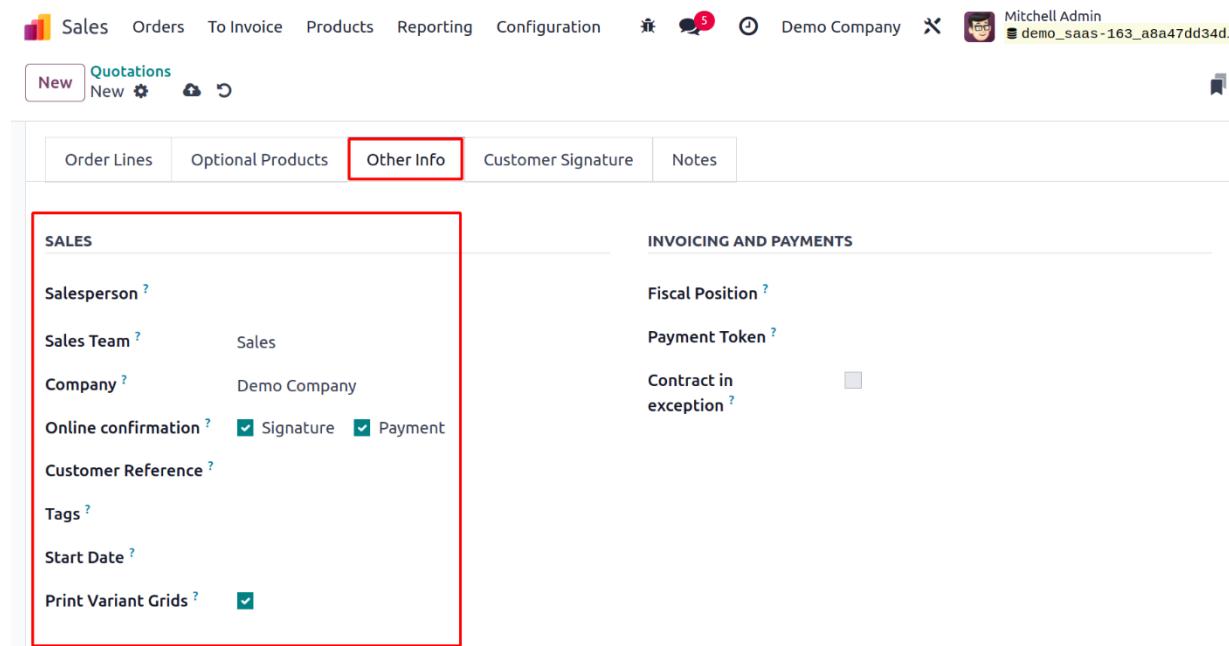
Terms & Conditions: <https://demo6.odoo.com/terms>

Total: \$ 0.00

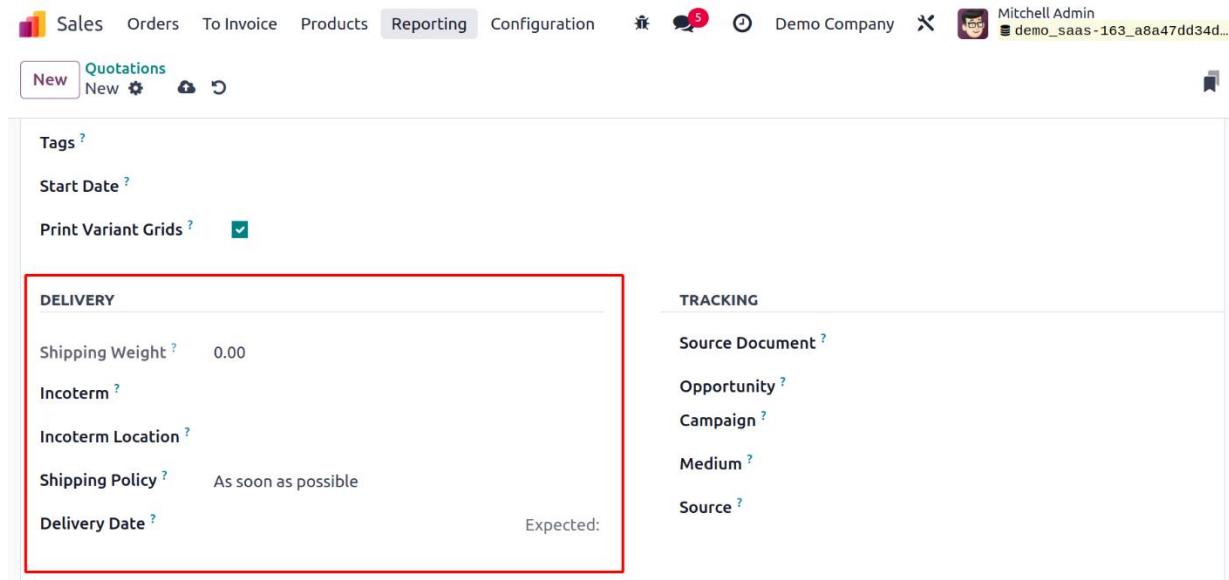
Businesses may provide customers with additional products as a part of their cross-selling techniques. In such circumstances, the Optional Products section is where you would mention those other products.

The screenshot shows the Odoo Quotations module. At the top, there is a navigation bar with links: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user icon for Mitchell Admin. Below the navigation bar, there is a toolbar with buttons for New, Quotations, and other actions. The main area is titled "Quotations" and shows a table with columns: Order Lines, Optional Products, Other Info, Customer Signature, and Notes. The "Optional Products" column header is highlighted with a red box. The table has a header row with columns: Product, Description, Quan..., UoM, Unit P..., Disc.%, and a width adjustment icon. Below the header, there is a button labeled "Add a product".

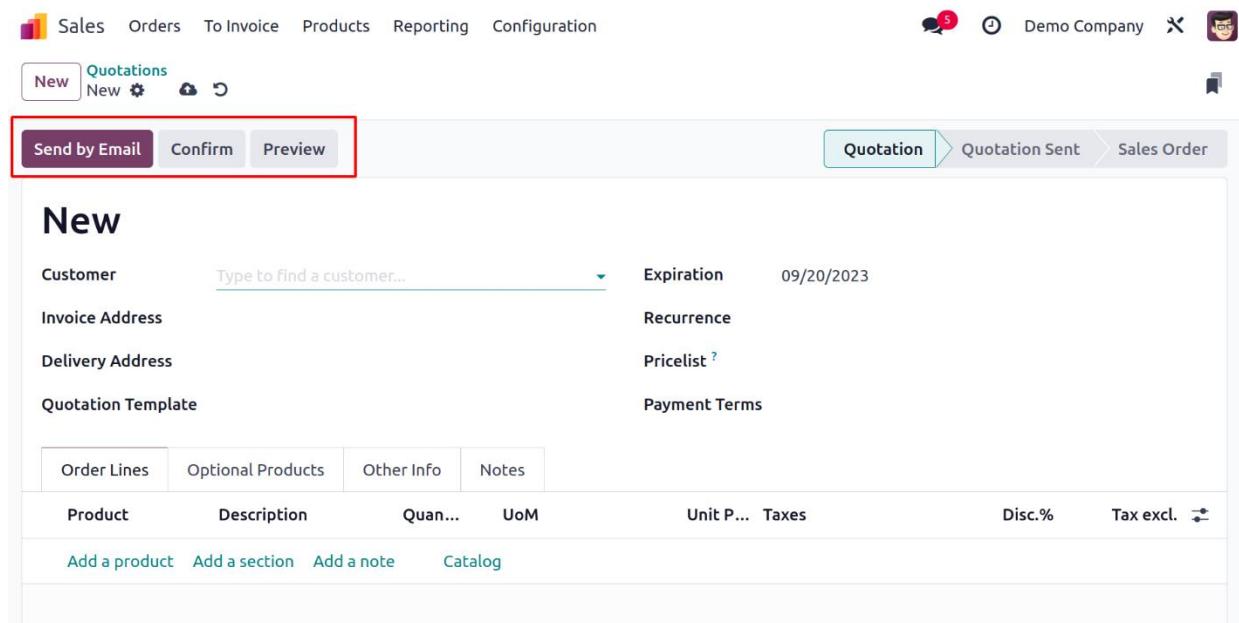
In the Sales section, designate a Salesperson to manage the quotation. Sales Team and Company names will auto-populate. Enable Online Signature for online customer signing and Online Payment for payment options. Add Customer Reference and Tags to print variant grids and reference Fiscal Position for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



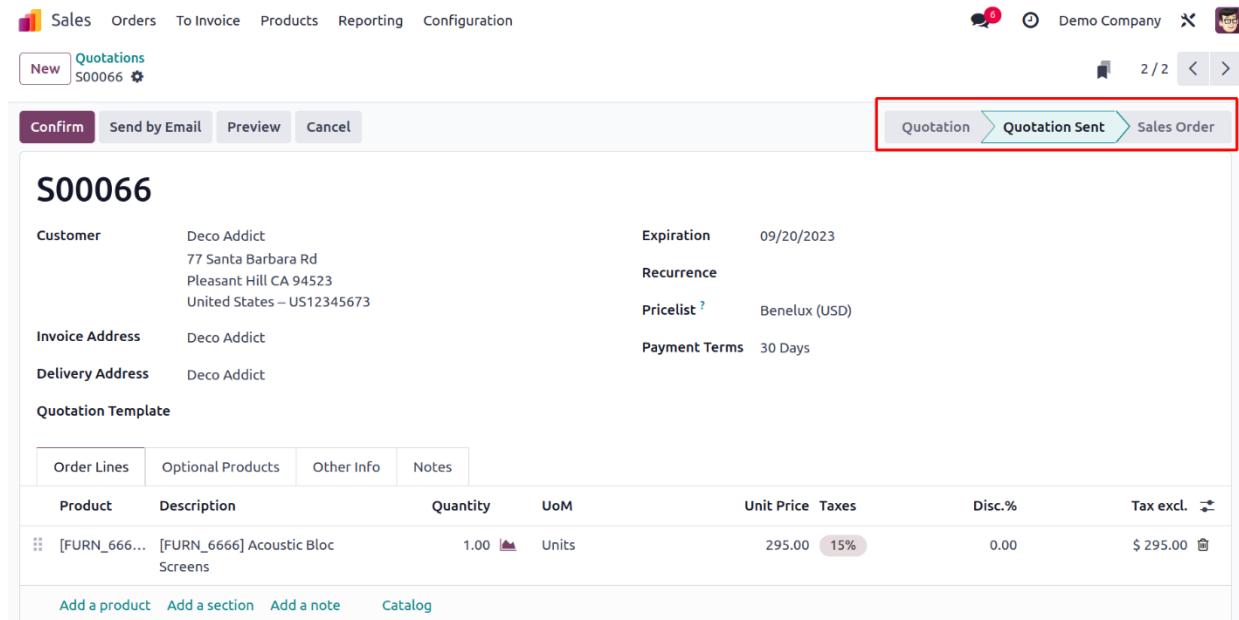
Choose a Shipping Policy (as soon as possible or when all products are ready) and mention the delivery date in the Delivery Date column. In the Tracking section, fill in the Source Document, Opportunity, Campaign, Medium, and Source for tracking purposes. Activating Online Signature adds a tab for capturing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



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.

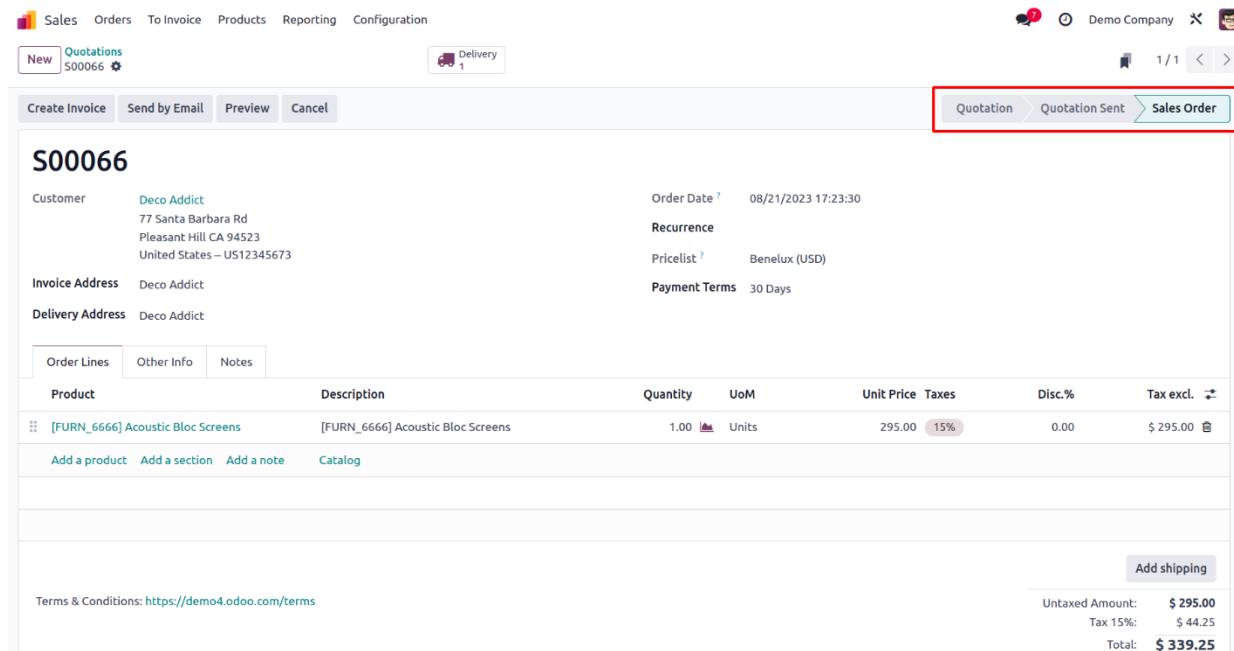


As shown in the figure below, the status of the quotation will be changed to "Quotation Sent."



## 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.

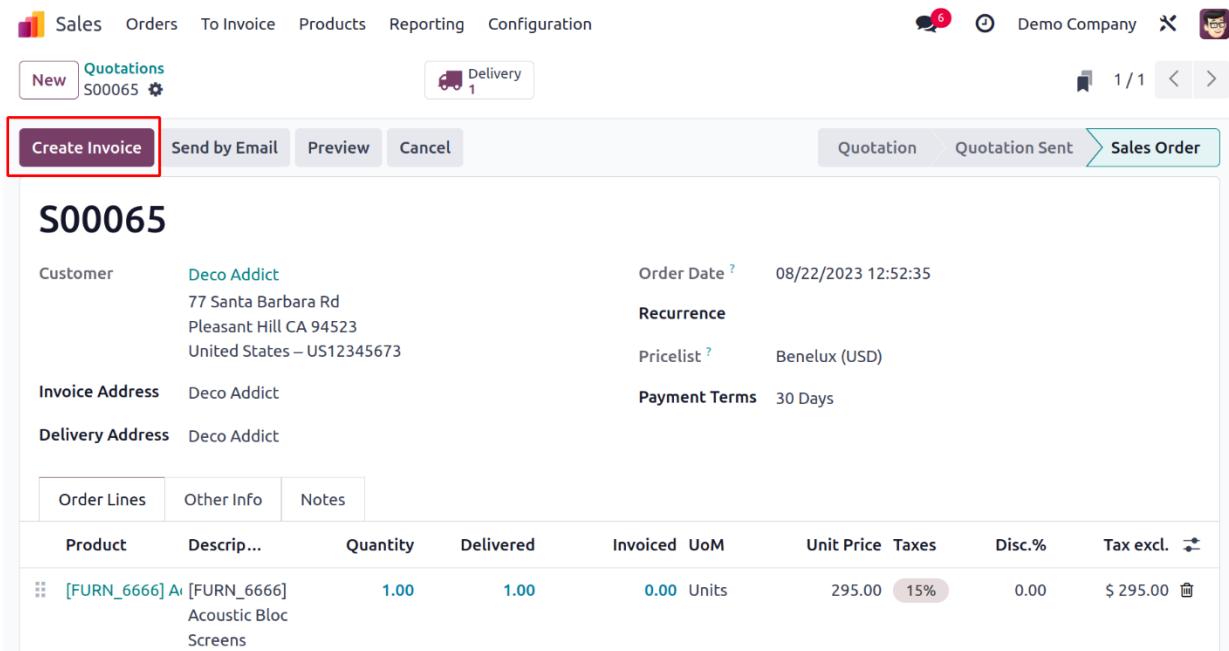


The Sales Order Number, Order Date, Website, Customer, Salesperson, Activities, Company, Total, and Invoice Status are displayed in the platform's list view. Odoo supports List, Kanban, Calendar, Pivot, Graph, and Activity views. Filters and Group By options help streamline search operations with default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

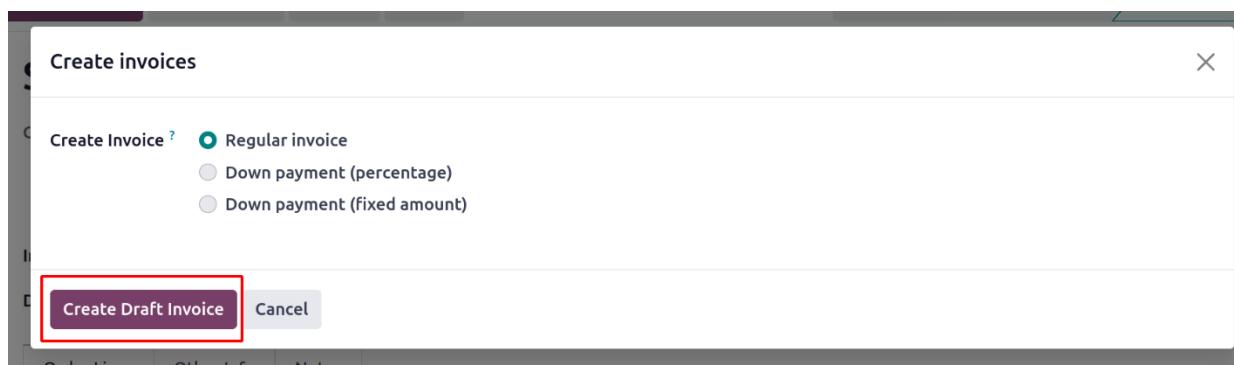
The screenshot shows the Odoo Sales Orders list view. At the top, there is a navigation bar with tabs: Sales, Orders (which is highlighted), To Invoice, Products, Reporting, and Configuration. Below the navigation bar, there are buttons for New, Quotations, and Orders. A dropdown menu is open over the Orders button, showing options: Quotations, Orders (highlighted with a red box), Sales Teams, and Customers. To the right of the dropdown is a search bar with the placeholder "My Quotations" and a "Search..." button. Further right are icons for messaging, notifications (with a red dot), and user profile. Below the search bar, it says "1-29 / 29" with navigation arrows and a list view icon. The main content area has four sections: "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). Below these sections is a table with the following data:

Number	Creation ...	Customer	Website	Salespers...	Activities	Company	Total	Status
S00066	08/21/2023 17:02	Deco Addict		Mitchell A...	<a href="#">View</a>	Demo Company	\$ 339.25	<span>Sales Order</span>
S00067	08/21/2023 17:21	Deco Addict		Mitchell A...	<a href="#">View</a>	Demo Company	\$ 0.00	<span>Quotation</span>
S00065	08/21/2023 16:58	Deco Addict		Mitchell A...	<a href="#">View</a>	Demo Company	\$ 0.00	<span>Quotation</span>

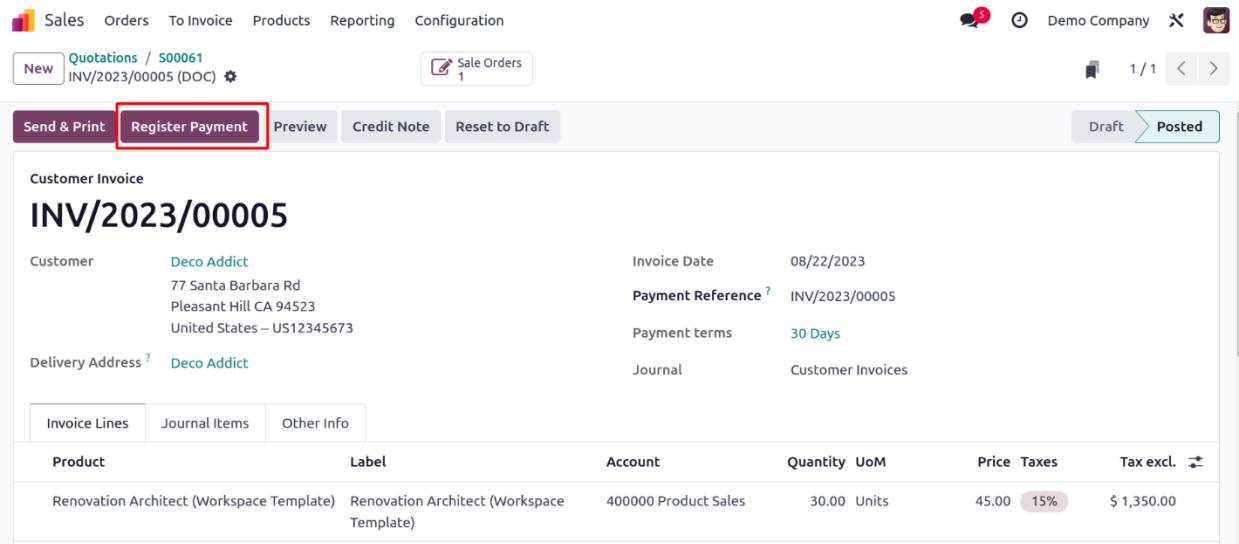
In Odoo 17, creating invoices for sales orders is simple. After confirming a sales order, a "Create Invoice" button appears in the sales window.



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.



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.

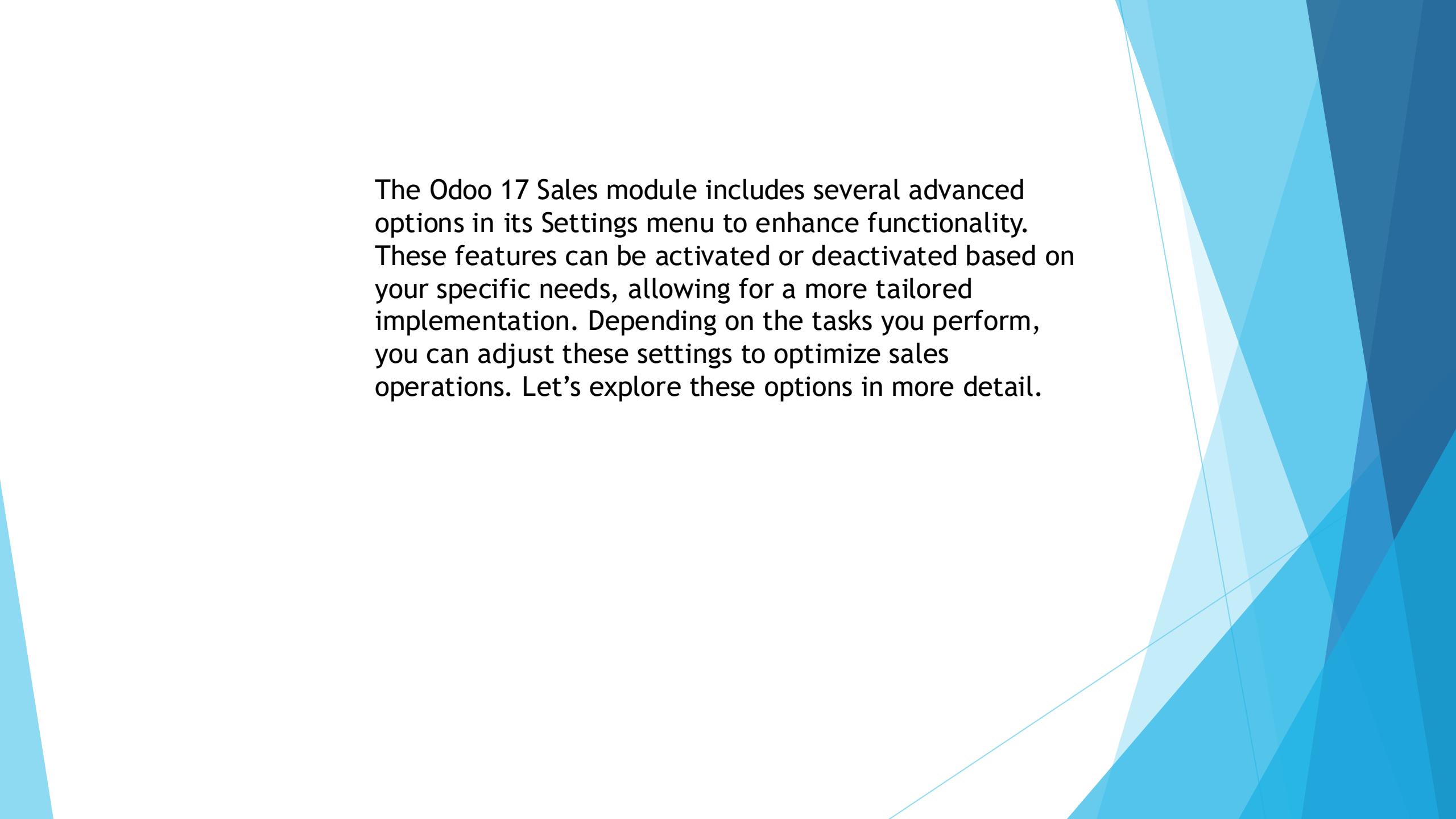
## Register Payment

X

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 background features a large, abstract graphic composed of overlapping triangles in shades of blue and cyan, creating a sense of depth and motion.

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.

The screenshot shows the Odoo 17 Sales module settings interface. On the left, a sidebar lists various modules: General Settings, CRM, Sales (selected), Rental, Website, Purchase, Inventory, Manufacturing, and Accounting. The main area is titled "Product Catalog". It contains several configuration options:

- Variants** (checked): Sell variants of a product using attributes (size, color, etc.).  
↳ [Attributes](#)
- Units of Measure** (checked): Sell and purchase products in different units of measure.  
↳ [Units of Measure](#)
- Product Packagings** (unchecked): Sell products by multiple of unit # per package
- Variant Grid Entry** (checked): Add several variants to an order from a grid
- Deliver Content by Email** (unchecked): Send a product-specific email once the invoice is validated

At the top, there are "Settings", "Save", and "Discard" buttons, and a search bar. The top right shows the user "Mitchell Admin" and the session ID "demo\_saas-163\_5fcda4dcc2...".

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 shows the Odoo 17 product management interface. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, and Configuration. Below the navigation bar, there is a toolbar with buttons for New, Products, Extra Prices, Go to Website, Bill of Materials, and More. The main area displays tabs for General Information, Attributes & Variants, Sales, Purchase, **Inventory**, and Accounting. The **Inventory** tab is currently selected and highlighted with a red border. In the **Inventory** tab, there are sections for OPERATIONS and LOGISTICS. Under OPERATIONS, there is a Routes section with options for Buy (checked) and Manufacture, and a link to View Diagram. Under LOGISTICS, there are fields for Responsible (set to Mitchell Admin), Weight (0.00 kg), Volume (0.00 m³), Customer Lead Time (0.00 days), HS Code, and Origin of Goods. Below the **Inventory** tab, there is a COUNTERPART LOCATIONS section with Production Location (Virtual Locations/Production) and Inventory Location (Virtual Locations/Inventory adjustment). At the bottom, there is a **PACKAGING** section with a table header (Packag..., Conta..., Unit of Mea..., Sa..., Pu..., Barcode, Company) and a button to Add a line. This **PACKAGING** section is also highlighted with a red border.

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 shows the Odoo interface for managing products. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user profile for Mitchell Admin. Below the navigation bar, there is a toolbar with buttons for New, Products, Extra Prices (0), Go to Website, In: 0 Out: 0, and More.

The main content area displays the 'Products' screen. A red box highlights the 'Attributes & Variants' tab, which is currently selected. Below this tab, there is a table with columns for Attribute and Values. An entry for 'Color' has two values: 'White' (purple button) and 'Black' (green button). There is also a 'Configure' button and a trash icon for this entry.

Below the table, there is a link to 'Add a line'. A warning message states: "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. It contains two radio buttons: 'Product Configurator' (selected, indicated by a green dot) and 'Order Grid Entry' (unselected, indicated by a grey dot).

# 1. Product Configurator

**Configure** X

Product	Quantity	Price
 Shirt (White) COLOR 	<input type="button" value="-"/> 1 <input type="button" value="+"/>	\$ 1.00
Total: \$ 1.00		

**Confirm** **Back**

## 2. Grid Entry

Choose Product Variants

X

Shirt

White

Black

0

0

Confirm

Discard

## Pricing

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

Sales Orders To Invoice Products Reporting Configuration

Settings Save Discard Search...

**Pricing**

- Discounts**  
Grant discounts on sales order lines
- Discounts, Loyalty & Gift Card**  
Manage Promotions, coupons, loyalty cards, Gift cards & eWallet
- Pricelists** ?  
Set multiple prices per product, automated discounts, etc.
  - Multiple prices per product
  - Advanced price rules (discounts, formulas)
- Margins**  
Show margins on orders

[→ Pricelists](#)

General Settings CRM Sales Rental Website Purchase Inventory Manufacturing Accounting Project

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.

The screenshot shows the Odoo Sales Quotations module. At the top, there's a navigation bar with links: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user icon for Demo Company. Below the navigation is a toolbar with buttons for New, Quotations, New, Send by Email, Confirm, Preview, and a gear icon. A breadcrumb navigation shows the current state: Quotation > Quotation Sent > Sales Order. The main area is titled 'New' and contains fields for Customer (with a placeholder 'Type to find a customer...'), Expiration (09/22/2023), Invoice Address, Delivery Address, Quotation Template, Recurrence, Pricelist (with a question mark icon), and Payment Terms. Below these fields is a table for 'Order Lines'. The table has columns: Product, Quan..., UoM, Unit P..., Taxes, Disc.%, and Tax excl. The 'Disc.%' column is highlighted with a red border. The table shows one row for a product with ID [FURN\_6666] Acousti..., quantity 1.00, unit 'Units', unit price 100.00, taxes 10.00, discount 0.00, and total tax-excluded \$ 90.00. At the bottom of the table are buttons for Add a product, Add a section, Add a note, and Catalog.

Product	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
[FURN_6666] Acousti...	1.00	Units	100.00	10.00	0.00	\$ 90.00

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 shows the Odoo 17 Sales Quotations interface. At the top, there are navigation links: Sales, Orders, To Invoice, Products, and a New button for creating a new quotation. The current quotation is identified as S00083. The header also includes icons for users, notifications (7), messages (35), and My Company (San Francisco). A user profile for Clem is shown, along with the database name 53721724-master-all.

The main area is a table for Order Lines, with columns: Product, Description, Quantity, UoM, Unit Price, Taxes, Disc.%, and Tax excl. Below the table are buttons for Add a product, Add a section, Add a note, and Catalog.

At the bottom right, there are buttons for Coupon Code, Promotions, and a redboxed Discount. The Discount button is highlighted with a red border. Below these buttons, the Total amount is listed as \$ 0.00, and the Margin is \$ 0.00. A link to Terms & Conditions is provided at the bottom left.

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.

The screenshot shows the Odoo Sales Quotations interface. On the left, a modal window titled "Discount" is open, showing a "Discount" input field set to 10% and a radio button selected for "On All Order Lines". Below the input fields are "Apply" and "Discard" buttons. On the right, the main Quotation page displays a table of order lines. One line item for "Acoustic Bloc Screens" has a red box drawn around the "Disc.%" column, which contains the value "10.00". At the bottom right of the screen, a summary shows the "Untaxed Amount" as \$265.50, "Tax 15%" as \$39.83, and the "Total" as \$305.33.

Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
[FURN_6666]	[FURN_6666] Aco...	1.00	Units	295.00	15%	10.00	\$ 265.50

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.

The screenshot shows the Odoo Sales Quotations interface. At the top, there are navigation links: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a user icon. Below the header, it says "Quotations" and "S00065". There are buttons for "New", "Edit", "Delete", and "Print". The main area displays a table for Order Lines. The table has columns: Product, Quantity, UoM, Unit Price, Cost, Taxes, Disc.%, and Tax excl. A row for "Acoustic Bloc Screens" shows a quantity of 1.00, unit price of \$200.00, cost of \$150.00, and taxes of \$0.00, resulting in a total of \$200.00. Below the table, there are buttons for "Add a product", "Add a section", "Add a note", and "Catalog". At the bottom, there are buttons for "Add shipping", "Coupon Code", and "Promotions". The total amount is listed as "Total: \$ 200.00". A red box highlights the "Margin: \$ 50.00 (25%)" message at the bottom right.

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

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.

Sales Orders To Invoice Products Reporting Configuration

Settings Save Discard Search... Quotations & Orders

General Settings CRM Sales Rental Website Purchase Inventory Manufacturing Accounting Project Sign Planning Timesheets Email Marketing

**Quotations & Orders**

**Default values** Default values used when creating new quotations. Those can still be changed on each quotation.  
Default values will be overwritten by values provided by the quotation template.

**Online Signature** Request an online signature to confirm orders

**Online Payment** Request an online payment to confirm orders  
→ [Payment Providers](#)

**Default Quotation Validity** 30 days

**Sale Warnings** Get warnings in orders for products or customers

**Pro-Forma Invoice** Allows you to send Pro-Forma Invoice to your customers

**Quotation Templates** Create standardized offers with default products  
Default Template Default Template →  
→ [Quotation Templates](#)

**Lock Confirmed Sales** No longer edit orders once confirmed

## Invoicing

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

The screenshot shows the Odoo Settings interface with the 'Invoicing' tab selected. The left sidebar lists various modules: General Settings, Events, CRM, Sales (which is selected and highlighted in blue), Rental, Calendar, Social Media, Referrals, Website, and eLearning. The top navigation bar includes Sales, Orders, To Invoice, Products, Reporting, Configuration, Save, Discard, Settings, and a search bar. The main content area has a header 'Invoicing' with a red box around it. It contains sections for 'Invoicing Policy' (with radio buttons for 'Invoice what is ordered' and 'Invoice what is delivered'), 'Down Payments' (with a note about product used for down payments), and two checked checkboxes for 'Automatic Invoice' and 'Consolidate subscriptions billing'. The 'Automatic Invoice' section includes a dropdown for 'Invoice Email Template' set to 'Invoice: Sending'.