Assignment - Purchase Module Assignment - Session 4

1. How to create a purchase order in Odoo v18?

Creating a Purchase Order:

1. Navigate to the Purchase app.
2. Click on "New" to create a new Request for Quotation (RFQ).
3. Fill in the vendor details and add the desired products.
4. Once the RFQ is ready, click "Confirm Order" to convert it into a Purchase Order (PO).

2. How to configure and use Purchase Agreements in Odoo v18?

Configuring and Using Purchase Agreements:

1. In the Purchase app, go to Configuration ‣ Settings.
2. Enable Purchase Agreements and save the settings.
3. To create a purchase agreement, navigate to Orders ‣ Purchase Agreements, click "New", and define the agreement type.
4. Add vendors and products to the agreement.
5. Once set up, you can create RFQs from the purchase agreement to manage vendor selections and pricing.

3. How to automatically generate purchase orders based on stock levels?

Automatically Generating Purchase Orders Based on Stock Levels:

1. Ensure that products have appropriate Reordering Rules set.
2. Go to the Inventory app, navigate to Products ‣ Reordering Rules, and set the minimum and maximum stock levels for each product.
3. When stock levels fall below the minimum threshold, Odoo will automatically generate a draft RFQ, which can be confirmed into a PO.

4. How to manage vendor price lists in Odoo v18?

Managing Vendor Pricelists:

1. In the Purchase app, navigate to Configuration ‣ Vendor Pricelists.
2. Click "New" to create a new pricelist, select the vendor, and specify product prices and validity periods.
3. These pricelists will be automatically applied when creating RFQs or POs for the respective vendors.

5. How to track received products in a purchase order?

Tracking Received Products in a Purchase Order:

1. After confirming a PO, a Receipt is generated.
2. Navigate to the Inventory app, go to Operations ‣ Receipts, and select the relevant receipt.

Here, you can validate the received quantities and process the receipt accordingly.

6. How to configure a three-way matching system in Odoo v18?

Configuring a Three-Way Matching System:

1. In the Purchase app, go to Configuration ‣ Settings.
2. Under the Invoicing section, enable 3-way matching and save the settings.
3. This ensures that vendor bills are only paid when the PO, vendor bill, and receipt are in agreement.

7. How to handle partial receipts for a purchase order?

Handling Partial Receipts for a Purchase Order:

1. When receiving products, you can validate partial quantities in the Receipts section of the Inventory app.
2. Odoo will keep track of the remaining quantities and allow you to process subsequent receipts until the order is fully received.

8. How to set up approval rules for purchase orders?

Setting Up Approval Rules for Purchase Orders:

1. Activate the Purchase Order Approval feature by navigating to the Purchase app's Settings and enabling Order Approval.
2. Define the approval criteria, such as minimum amounts requiring approval.
3. Users with the appropriate access rights will need to approve POs that meet these criteria before they can be confirmed.

9. How to generate reports for purchase analysis?

Generating Reports for Purchase Analysis:

1. In the Purchase app, go to Reporting ‣ Purchase.
2. Utilize the Purchase Analysis report to gain insights into metrics like quantities ordered and received, vendor performance, and lead times.

10. How to create a return for received goods?

Creating a Return for Received Goods:

1. Navigate to the Inventory app and go to Operations ‣ Returns.
2. Create a new return, reference the original receipt, and specify the products and quantities to be returned.
3. Validate the return to update stock levels and inform the vendor.

11. How can you configure Odoo 18 to apply a 0% tax for customers outside your country automatically?

Configuring 0% Tax for Customers Outside Your Country:

1. Create a Fiscal Position that applies a 0% tax rate for foreign customers.
2. Navigate to the Accounting app, go to Configuration ‣ Fiscal Positions, and define a new fiscal position mapping domestic taxes to 0% for exports.
3. Assign this fiscal position to customers outside your country to automatically apply the 0% tax rate on their invoices.

12 .How can you configure Odoo 18 to block a Sales Quotation confirmation for blacklisted customers, but allow an admin to override the block?

Blocking Sales Quotation Confirmation for Blacklisted Customers with Admin Override:

1. Implement Sales Warnings to alert users when dealing with blacklisted customers.
2. In the Sales app, navigate to Configuration ‣ Settings, enable Warnings, and save.
3. On the customer's form, set a warning or blocking message.

To allow admin override, configure user roles and access rights accordingly.

13.How can you configure Odoo 18 to warn a salesperson when a customer exceeds their credit limit, requiring finance team approval?

Warning Salesperson When a Customer Exceeds Their Credit Limit, Requiring Finance Team Approval:

1. Activate the Sales Credit Limit feature in the Accounting app's settings.
2. Set credit limits for customers in their respective contact forms under the Accounting tab.
3. Configure approval rules so that when a salesperson attempts to confirm a sale exceeding the customer's credit limit, approval from the finance team is required.