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Graduation Project Proposal Form

1. Project Information

- **Project Title:** Odoo Implementation for printers' company
- **Course/Track:** ERP Odoo Application Consultant
- **Team Members:**

1. Menna Allah Essam Shalaby Elghawaby
2. Mohsen Khalaf Mohamed
3. Ali Abdelaal Eissa
4. Hassan Sayed Hassan Mohamoud
5. Ahmed Reda Mohamed Mohamed
6. Mark Michael Kamal

2. Project Overview

- **Objective:**

To optimize printer company operations, boost efficiency, and elevate customer satisfaction through a tailored Odoo ERP solution.

- **Scope of Work:**

Implement Odoo for a printer company, optimizing sales, purchase, inventory, accounting and CRM.

- **Expected Outcomes:**

Odoo will help the printer company work better and save money and will give the company better information to make smart choices.

3. Problem Statement

- The printer company faces challenges with outdated systems and manual processes, hindering efficiency and data-driven decisions.

4. Proposed Solution

- **Technologies Used:**

Waterfall Methodology

- **System Architecture:**

- **Sales:** Manage customer relationships, process sales orders, generate quotations, and handle invoicing.
- **Purchase:** Manage supplier relationships, plan and execute purchasing activities, and ensure timely delivery of goods and services.
- **Inventory:** Track stock levels, manage warehouse operations, and handle product returns.
- **Accounting:** Manage financial transactions, generate reports, and manage tax compliance.
- **Customer Relationship Management (CRM):** Manage customer relationships, track opportunities, and provide customer service.

- **Hardware/Software:**

Odoo ERP

Odoo Implementation Project for a Printer Devices Company

1. Project Scope

Objectives:

- Optimize business processes and improve efficiency.
- Enhance data management and reporting.
- Streamline financial operations and ensure compliance.
- Improve customer satisfaction and loyalty.

Modules:

- Accounting
- Sales
- Purchase
- Inventory
- CRM

2. Project Phases

A. Planning and Preparation

- **Needs Assessment:** Conduct a detailed analysis of the company's current business processes, pain points, and goals.
- **Odoo Evaluation:** Assess Odoo's suitability for the company's specific requirements.

B. Data Migration

- **Data Extraction:** Extract relevant data from existing systems (e.g., ERP, CRM, accounting software).
- **Data Cleaning and Transformation:** Cleanse and transform data to match Odoo's data structure.
- **Data Loading:** Load the cleaned data into Odoo.

C. Configuration

- **Module Configuration:** Configure essential modules (Accounting, Sales, Purchase, Inventory, CRM) to match the company's specific workflows and processes.

D. User Training

- **Training Materials:** Develop training materials tailored to the company's specific needs.
- **Training Sessions:** Conduct hands-on training sessions for employees.
- **User Support:** Provide ongoing support and assistance to users.

E. Go-Live and Post-Implementation

- **Data Validation:** Validate data accuracy and consistency after migration.
- **Go-Live:** Launch Odoo in the production environment.
- **Post-Implementation Support:** Provide ongoing support, maintenance, and updates.

3. Challenges and Mitigation Strategies

- **Data Quality:** Ensure data accuracy and consistency during the migration process.
- **User Adoption:** Develop strategies to encourage user adoption and overcome resistance to change.
- **Training and Support:** Provide adequate training and support to ensure effective use of Odoo.

4.Pros and Cons of Odoo Implementation

Pros:

- **Efficiency:** Streamline business processes.
- **Data Management:** Improve data accuracy, accessibility, and reporting.
- **Scalability:** Accommodate business growth and expansion.
- **Cost-Effective:** Potentially reduce operational costs and improve ROI.

Cons:

- **Learning Curve:** Users may need time to adapt to Odoo's interface and functionality.

By carefully addressing these challenges and leveraging the benefits of Odoo, a printer devices company can significantly improve its operations, efficiency, and overall performance.

Begin your Odoo journey by configuring the accounting module

Accounting Module

A. Install the Accounting Module:

Ensure that the accounting module is installed and activated in your Odoo instance. If not, you can install it from the Odoo App Store.

B. Configure General Settings:

1- Company Data

- Go to setting >>>Update Info
- Fill in the required Company Details

The screenshot shows the Odoo General Settings interface for company configuration. The company name is set to 'Al Ansar'. The 'General Information' tab is selected. The form includes fields for Contact (Al Ansar), Address (Street, Street 2, City, State, ZIP), Tax ID, Company ID, Currency (EGP), and various contact details like Phone, Mobile, Email, Website, Parent Company, Email Domain, Bounce, Catchall, Default From, and Color (set to red). The top navigation bar shows 'General Settings' and other modules like Users & Companies, Translations, Gamification Tools, and Technical. The top right corner shows user information and a search bar.

2- Product Category

- Go to Accounting >>>Configuration>>>Product Category
- Creating New Product Category:
 - Enter a name for the category (e.g., "Xerox," "HP," "Canon").
 - Set the parent category (e.g., "Printers," "Consumables," "Accessories").
- Then go to Accounting >>>Configuration
- Enable Automatic Accounting entries for stock movements.

The screenshot shows the Odoo Accounting module interface. At the top, there are tabs for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, and Configuration. On the right, there are user icons and the menu 'mena edu-test2000'. Below the tabs, there are buttons for 'New', 'Product Categories', and 'Accessories / CANON'. The main area is titled 'Category ?' and contains the category name 'CANON'. A 'Parent Category ?' dropdown is set to 'Accessories'. The form is divided into sections: 'LOGISTICS' (Force Removal Strategy ?), 'INVENTORY VALUATION' (Costing Method ? Average Cost (AVCO), Inventory Valuation ? Automated), 'ACCOUNT PROPERTIES' (Price Difference Account ?, Income Account ? 4033 Product Sales (Canon Accessories), Expense Account ? 10444 Stock Input Account), and 'ACCOUNT STOCK PROPERTIES' (Stock Valuation Account ? 1041 Inventory, Stock Journal ? Inventory Valuation, Stock Input Account ? 10444 Stock Input Account, Stock Output Account ? 5033 Purchase Cost (Canon Accessories)). A button at the bottom says 'Set other input/output accounts on specific locations ..'

3- Chart of Accounts

Create accounts for several types of assets, liabilities, equity, income, and expenses.

- Go to Accounting >> Configuration >> Chart of Accounts >> New
- Enter Code
- Account Name
- Type
- Allow Reconciliation

The screenshot shows the 'Chart of Accounts' list view. At the top, there are buttons for 'Save', 'Discard', and 'Import', and a search bar with filters for 'Active Account' and 'Search...'. The main area displays a table with columns: 'Code', 'Account Name', 'Type', and 'Allow Reconciliation'. Each row has a 'View' link. There are 214 entries listed, starting from 1 and ending at 1010. The table includes rows for Liquidity Transfer, Right of use Asset (IFRS 16), Accumulated Depreciation right use asset (IFRS 16), VAT Receivable, Cash, Outstanding Receipts, Main Safe, Main Safe - Foreign Currency, Visa & Master Credit Cards, Gateway Credit Cards, Manual Visa & Master Cards, and PayPal Account.

4- Set Up Bank Accounts:

- Go to Accounting >> Configuration >> Add a Bank Account
- Then Click Record transactions manually

- Enter Account Number
- Bank
- Bank Identifier Code

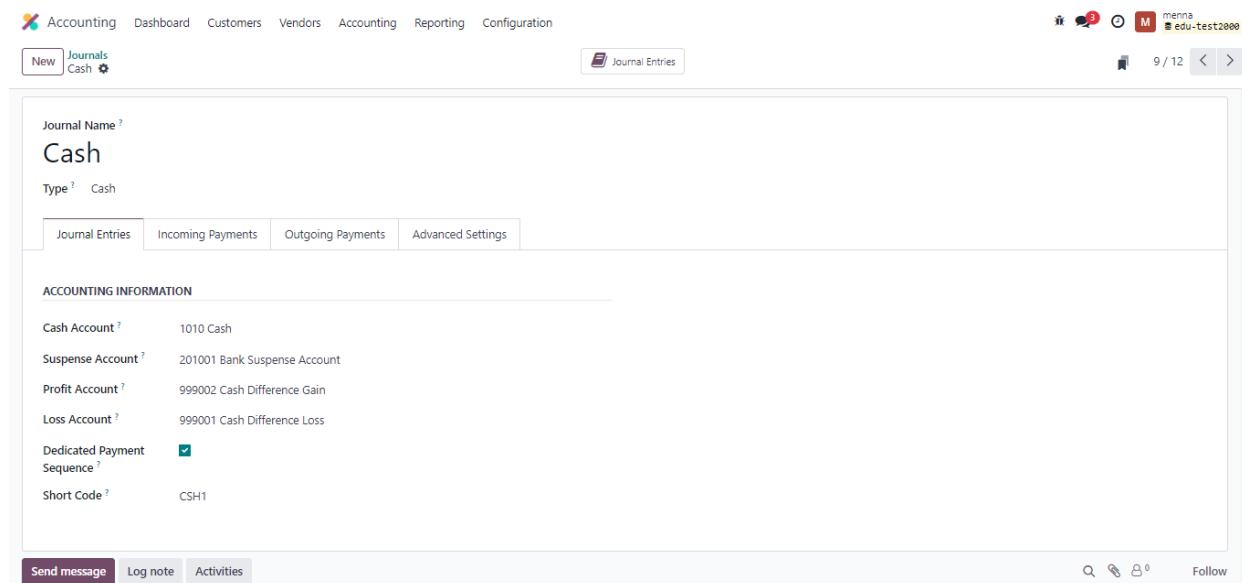
The top screenshot displays a search bar and a list of bank accounts categorized by type. The bottom screenshot shows a form for creating a new bank account with three required fields: Account Number, Bank, and Bank Identifier Code.

5- Create Journals

Create journals for different types of transactions (e.g., Sales Journal, Purchase Journal, Cash Journal, Bank Journal).

- Go to Accounting >>> Configuration >>> Journals >>> New
- **Set Journal Details**
- **Name:** Give the journal a descriptive name (e.g., "Customer Invoice Journal," "Vendor Bill Journal").
- **Code:** Assign a unique code for the journal.
- **Type:** Select the journal type:
 - **Miscellaneous Journal:** For miscellaneous transactions.
 - **Opening Balance Journal:** For opening entries at the end of the accounting period.
 - **Asset Management Journal:** for asset Transaction.
 - **Customer Invoices Journal:** For sales-related transactions.

- **Vendor Bills Journal:** For purchase-related transactions.
- **QNB Bank Journal:** For bank transactions.
- **Cash Journal:** For cash transactions.
- Then set Default Account for each Customer Invoice, Vendor Bill, Bank and Cash journals.



- Once Enable Automatic Accounting creates Inventory Valuation Journal.

6- Incoming and Outgoing Payments

Allows you to configure incoming and outgoing payments to be recorded directly as cash or bank transactions within the invoice itself.

Through entering the cash and bank account in outstanding receipts account and outstanding payments accounts.

The screenshot shows the Odoo Accounting module interface. At the top, there is a navigation bar with links for Accounting, Dashboard, Customers, Vendors, Accounting, Reporting, Configuration, and a user menu for 'menna'.

In the main content area, a form is displayed for creating a new journal entry. The form has fields for 'Journal Name?' (set to 'Cash'), 'Type?' (set to 'Cash'), and tabs for 'Journal Entries', 'Incoming Payments', 'Outgoing Payments', and 'Advanced Settings'. Under the 'Outgoing Payments' tab, there is a table with one row showing a payment method ('Manual') and its corresponding account ('1010 Cash'). A button 'Add a line' is available to add more rows. Below the table, there are buttons for 'Send message', 'Log note', and 'Activities', along with a search bar and a 'Follow' button.

This screenshot is identical to the one above, showing the configuration of a new journal entry for 'Cash'. The interface includes the same navigation bar, form fields, and table for payment methods and accounts. The only difference is the page number at the top right, which is now '9 / 12'.

7- Taxes

Taxes configurations come from localization.

To set prices including taxes:

- Go to Accounting >>> Configuration >>> Taxes >>> New
- Enter Tax Name >>> Tax Type >>> Active >>> Amount >>> Check Included in Price

Tax Name ? 14% included **Tax Type ?** Purchases
Description ? **Tax Scope ?**
Tax Computation ? Percentage of Price **ETA Code (Egypt) ?** T1 - V009 - General Item sales
Active ? **Amount ?** 14.0000 %
Label on Invoices ? VAT 14% **Included in Price ?**
Tax Group ? VAT 14% **Affect Base of Subsequent Taxes ?**
Country ? Egypt **Tax Exigibility ?** Based on Invoice
 Based on Payment

Definition **Advanced Options**

Send message **Log note** **Follow**

To set Cash Basis

- Accounting >>> Configuration >>> Setting
- Activate Cash Basis
- Then Based on Payment Tax Exigibility >>> Enter Cash Basis Transition Account

Tax Name ? 14% Cash Basis **Tax Type ?** Sales
Description ? **Tax Scope ?**
Tax Computation ? Percentage of Price **ETA Code (Egypt) ?** T1 - V009 - General Item sales
Active ? **Amount ?** 14.0000 %
Label on Invoices ? VAT 14% **Included in Price ?**
Tax Group ? VAT 14% **Affect Base of Subsequent Taxes ?**
Country ? Egypt **Base Affected by Previous Taxes ?**
Tax Exigibility ? Based on Invoice Based on Payment
Cash Basis Transition Account ? 2120 Vat payable - transit account

8- Fiscal Year

- Accounting >>> Configuration >>> Setting
- Enable Fiscal Year
- Define fiscal years quarters or years
- You will need to **create a new fiscal year manually** for each year.

Name	Start Date	End Date
Q1 2024	01/01/2024	03/31/2024
Q2 2024	04/01/2024	06/30/2024
Q3 2024	07/01/2024	09/30/2024
Q4 2024	10/01/2024	12/31/2024

9- Payment Terms

To ensure invoices are paid correctly and on time we need to add payment terms, which give three different options:

- Set deadlines
- Split payments
- Payment discounts

To set this up:

- Accounting >>> Configuration>>> Payment Terms >>> New

Payment Terms ?

40% now, 60% end of next month

Early Discount ?

DUE TERMS		PREVIEW
Due	After	
40.000000 Percent	0 Days after invoice date	<input type="button" value="Delete"/>
60.000000 Percent	0 Days after end of next month	<input type="button" value="Delete"/>
Add a line		

Example: 1,000.00 LE on 10/11/2024

40% due immediately, remaining 60% due at the end of the following month

1# Installment of **400.00 LE** due on **10/11/2024**
2# Installment of **600.00 LE** due on **11/30/2024**

Show installment dates ?

New Payment Terms

2/7 Net 30

9 / 9 < >

Payment Terms ?

2/7 Net 30

Early Discount? 2.00 % if paid within 7 days

Reduced tax: On early payment

DUE TERMS

Due	After	
100.000000	Percent	30 Days after invoice date 
Add a line		

PREVIEW

Example: 1,000.00 LE on 10/10/2024

Payment terms: 30 Days, 2% Early Payment Discount under 7 days

Early Payment Discount: 980.00 LE if paid before 10/17/2024

1# installment of 1,000.00 LE due on 11/09/2024

 Show installment dates ?

Additional Tips:

- Use the Accounting Dashboard:** The dashboard provides a visual overview of your financial performance.
- Reconcile Bank Statements:** Regularly reconcile your bank statements with Odoo to ensure accuracy.
- Generate Financial Reports:** Use Odoo's reporting tools to create customized financial statements.

By following these steps, you can effectively set up the accounting module in Odoo and start managing your company's finances.

Purchase Module

Purchase Orders Products Reporting Configuration		3	1-10 / 10	< >	M
New	Vendors				
		Search...			
 اي تكنولوجيا local Egypt info@itech.com	 التكنولوجيا الحديثة local Egypt support@moderntech.com				
 الدلتا للأدوات المكتبية local Egypt info@deltaoffice.com	 الشرق لأجهزة الطباعة local Egypt info@elsherkprint.com				
 الشركة المصرية للأجهزة local Egypt contact@egyptdevices.com	 المتحدة للطباعة local Egypt sales@unitedprinting.com				
 المصرية لمعدات الطباعة local Egypt sales@egprinters.com	 برينت ماستر local Egypt sales@printmaster.com				
 طيبة للتوريدات local Egypt info@tayba-supplies.comEGP	 هاسبر تك local Egypt info@mastertech-print.com				

1- Vendor creation:

الخطوات:

1. الدخول إلى وحدة المشتريات:

الدخول إلى Odoo purchase module ثم اختيار

2. إنشاء مورد جديد :

من القائمه اختار vendor <<< orders create

3. إدخال معلومات المورد:

- أدخل اسم المورد ، ومعلومات التصال مثل البريد الإلكتروني ورقم الهاتف.

- فئه المورد : تحديد الفئه المناسبه للمورد مثل (محلي ، دولي) .

- شروط الدفع:تحديد شروط الدفع مع المورد مثل (الدفع بعد ٣٠ يوم)

4 . حفظ المورد:

بعد إنتهاء جميع التفاصيل ، الضغط على زر save لتسجيل المورد علي السيستم.

الدلتا للأدوات المكتبية	800.00 LE	برينت ماستر	1,000.00 LE
40.00	14 days	40.00	4 days
الشركة المصرية للأجهزة	1,200.00 LE	أي تكنولوجيا	1,000.00 LE
35.00	3 days	30.00	10 days
الشركة المصرية للأجهزة	1,300.00 LE	الเทคโนโลยجيا الحديثة	1,200.00 LE
30.00	3 days	26.00	12 days
أي تكنولوجيا	60,000.00 LE	ماستر تك	1,600.00 LE
25.00	10 days	22.00	7 days
الเทคโนโลยجيا الحديثة	55,000.00 LE	برينت ماستر	900.00 LE
22.00	12 days	20.00	4 days
طبيبة للتصريات	1,000.00 LE	الشرق لأجهزة الطباعة	50,000.00 LE
20.00	11 days	20.00	17 days
الدلتا للأدوات المكتبية	55,000.00 LE	المتحدة للطباعة	80,000.00 LE
20.00	14 days	19.00	8 days
المصرية لمعدات الطباعة	1,100.00 LE	المصرية لمعدات الطباعة	47,000.00 LE
17.00	16 days	15.00	16 days
المتحدة للطباعة	25,000.00 LE	طبيبة للتصريات	80,000.00 LE
12.00	8 days	12.00	11 days
الشرق لأجهزة الطباعة	70,000.00 LE	ماستر تك	20,000.00 LE
10.00	17 days	8.00	7 days
الเทคโนโลยجيا الحديثة	17,000.00 LE	أي تكنولوجيا	45,000.00 LE
1.00	0 days	1.00	0 days

2- Vendor Pricelist Creation:

• الخطوات:

1. الدخول إلى قائمة الأسعار:

▪ من وحدة المشتريات اختر Configuration ثم اختر Vendor Pricelist

2. إنشاء قائمة أسعار جديدة:

▪ يوجد طريقتين:

▪ عمل إكسل شيت يحتوي على (اسم المورد، اسم المنتج، كود المنتج، السعر، الكمية، مدة التوصيل) ثم رفعه عن طريق اختيار Import Upload File.

▪ الإدخال اليدوي باختيار زر Create

3. حفظ قائمة الأسعار:

▪ بعد إدخال التفاصيل، نضغط على زر Save

The screenshot shows the Odoo Purchase module interface for creating a Request for Quotation (RFQ). The vendor is set to 'الشركة المصدّرة للأجهزة'. The order deadline is 10/08/2024 11:16:00. The product listed is EPSON L14150 with a quantity of 1.00 and a unit price of 21,000.00 LE. Taxes are 14%, and the total amount is 23,940.00 LE.

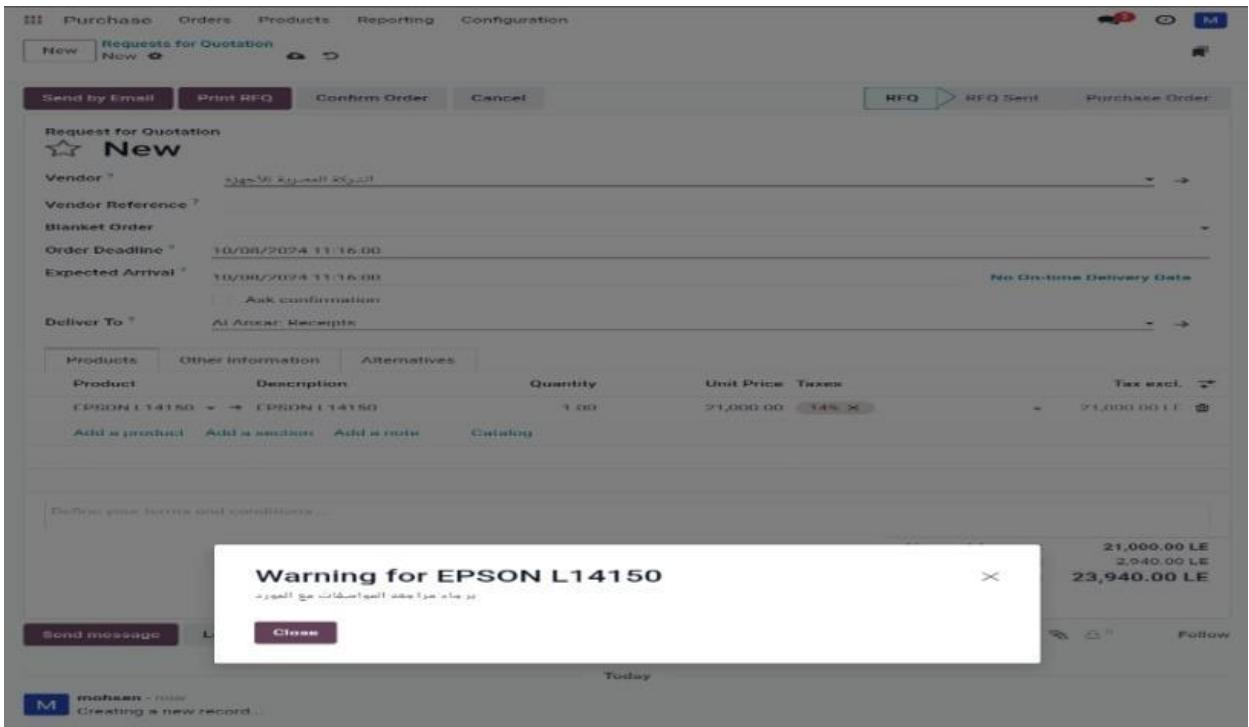
Product	Description	Quantity	Unit Price	Taxes	Tax excl.
EPSON L14150	EPSON L14150	1.00	21,000.00	14%	21,000.00 LE

RFQ Sent

3-Request for Quotation (RFQ):

• الخطوات:

1. إنشاء طلب عرض أسعار:
▪ من وحدة المشتريات، انتقل إلى RFQs واضغط على إنشاء.
2. إدخال تفاصيل:
▪ اختر الموردين الذين ترغب في طلب عرض الأسعار منهم، وحدد المنتجات والكميات المطلوبة.
3. إرسال RFQ:
▪ بعد إدخال التفاصيل، اضغط على Send by Email لإرسال الطلبات.



4-Warnings:

عند إنشاء أوامر الشراء أو إضافة الموردين، إذا كانت هناك أي تحذيرات (مثل تحذيرات متعلقة بالجودة أو الأسعار)، سيظهر تنبيه يطلب مراجعة هذا الأمر قبل المتابعة.

ولتفعيل الـ warnings configuration نختار settings ثم نفعّل warnings ونختار purchase products ثم نفتح أي منتج ونختار warnings وسوف تظهر خاصيّة الـ Save warnings بالأسفل ونختار warnings ونكتب مثلاً (مراجعة مواصفات المنتج مع المورد) ثم نضغط Save.

وعندما نعمل RFQ ونختار المورد ونضيف المنتج سف تظهر لنا رسالة التحذير كما هو موضح بالصورة.

5-Quotation Receipt:

• الخطوات:

1. إضافة عرض أسعار المورد:

- عند استلام عرض الأسعار من المورد، افتح طلب عرض الأسعار (RFQ) واضغط على زر Add Vendor Quotation.

2. إدخال تفاصيل عرض السعر:

- أدخل الأسعار والشروط التي قدمها المورد.

3. حفظ عرض الأسعار:

- نضغط على زر Save

The screenshot shows the Odoo software interface for creating a new quotation request. The top navigation bar includes 'Purchase', 'Orders', 'Products', 'Reporting', and 'Configuration'. A toolbar on the right has icons for user profile, search, and other functions. The main window title is 'Requests for Quotation' with a 'New' button. Below the title are several input fields: 'Vendor' (selected 'الشركة المحدودة ٦٣٤٥٧'), 'Vendor Reference' (empty), 'Blanket Order' (checkbox), 'Order Deadline' (set to '10/08/2024 11:16:00'), 'Expected Arrival' (set to '10/08/2024 11:16:00'), and 'Ask confirmation' (checkbox). The 'Deliver To' field is set to 'Al Ansar: Receipts'. A table section lists a product: 'EPSON L14150' with a quantity of '1.00', unit price '21,000.00', and taxes '14%', totaling '21,000.00 LE'. Buttons at the bottom include 'Send message', 'Log note', 'Activities', and a search icon. A message from 'mohsen' is visible at the bottom left.

6-Purchase Order Creation:

• الخطوات:

1. تحويل RFQ إلى أمر شراء:

- بعد استلام عروض الأسعار، اختر العرض الأفضل واضغط على زر Confirm Order لتحويله إلى أمر شراء.

2. حفظ أمر الشراء:

- نضغط على زر Save

The screenshot shows the Odoo Purchase Order Creation interface. At the top, there are tabs for Purchase, Orders, Products, Reporting, and Configuration. Below that, a navigation bar includes New, Requests for Quotation / P00015 (Draft Bill * 113), Purchases, and a search bar. A toolbar on the right includes Draft and Posted buttons, and icons for Print, Copy, and Delete.

The main form is titled "Vendor Bill Draft". It contains the following fields:

- Vendor:** الشركة المصرية للمجذدة, القاهرة, مصر, C, Egypt
- Bill Reference:** Auto-Complete: Select a purchase order or an old bill
- Bill Date:** 10/17/2024
- Accounting Date:** 10/17/2024
- Payment Reference:** 5678901234567 (untrusted)
- Recipient Bank:** 5678901234567 (untrusted)
- Due Date:** 10/17/2024
- Journal:** Vendor Bills

The "Invoice Lines" section displays one item:

Product	Label	Account	Quantity	Price	Taxes	Tax excl.
Canon PIXMA GI-490 Ink Bottle	P00015: 10444 Stock Input Account	Canon PIXMA GI-490 Ink Bottles - 4 Pcs	1.00	900.00	14%	900.00 LE

At the bottom, there are buttons for Add a line, Add a section, and Add a note. The total amount is shown as Untaxed Amount: 900.00 LE, VAT 14%: 126.00 LE, and Total: 1,026.00 LE.

The footer features buttons for Send message, Log note, Activities, and a search bar. It also shows a notification from mohsen stating "This vendor bill has been created from: P00015" and "Vendor Bill Created".

7-Purchase Order Approval:

• الخطوات:

1. مراجعة أمر الشراء:

▪ اذهب إلى قائمة أوامر الشراء وراجع التفاصيل.

2. موافقة أمر الشراء:

▪ اضغط على Approve بعد التأكد من صحة جميع التفاصيل.

New Requests for Quotation
P00016

2 / 11

Approve Order Cancel

RFQ RFQ Sent **To Approve** Purchase Order

Purchase Order

P00016

Vendor ? المصرية لمعدات الطباعة

Vendor Reference ?

Blanket Order

Order Deadline ? 10/14/2024 20:36:52

Expected Arrival ? 10/14/2024 20:36:52 No On-time Delivery Data

Ask confirmation

Deliver To ? Al Ansar: Receipts

Products	Other Information	Alternatives			
Product	Description	Quantity	Unit Price	Taxes	Tax excl.
EPSON L3250	EPSON L3250	1.00	14,912.28	14%	14,912.28 LE
Add a product Add a section Add a note		Catalog			

Define your terms and conditions ...

Untaxed Amount: **14,912.28 LE**
VAT 14%: **2,087.72 LE**
Total: **17,000.00 LE**

Send message Log note Activities

² Follow

October 14, 2024

Purchase - 2 days ago
• RFQ → **To Approve** (Status)

Purchase - 2 days ago
Purchase Order created

8- (Receipt of Goods): استلام البضائع

الخطوات:

1. تأكيد استلام المنتجات:

○ من وحدة المخزون، اختر Receive Products واضغط على زر Receipts بجانب أمر الشراء.

2. مراجعة الكميات المستلمة:

○ أدخل الكميات المستلمة واضغط على Validate

Purchase Orders Products Reporting Configuration

Requests for Quotation / P00007
WH/IN/00003

New 1 / 1 < >

Detailed Operations Quality Checks

Validate Quality Checks Print Print Labels Cancel Draft Ready Done

★ WH/IN/00003

Receive From: الشركة المصرية للأجهزة

Destination Location: WH/Stock

Scheduled Date: 10/08/2024 11:16:00

Deadline: 10/08/2024 11:16:00

Source Document: P00007

Operations	Additional Info	Note
Product	Demand	Quantity
EPSON L14150	1.00	1.00
Add a line		

Send message Log note Activities

9-Vendor Bill Creation:

• الخطوات:

1. إنشاء فاتورة جديدة:

▪ من وحدة الفوائير، اختر Vendor Bills واضغط على Create

2. اختيار أمر الشراء:

▪ اختر أمر الشراء المرتبط بالفاتورة وأدخل التفاصيل المطلوبة.

3. تحقق من الفاتورة:

▪ تأكد من مطابقة الفاتورة لأمر الشراء واضغط على Validate

10-Payment to Vendor:

• الخطوات:

1. تسجيل الدفع:

▪ من قائمة الفوائير، اختر الفاتورة التي ترغب في دفعها واضغط على Register Payment

2. إدخال تفاصيل الدفع:

▪ اختر طريقة الدفع والمبلغ والحساب المصرفي المناسب.

3. تأكيد الدفع:

▪ اضغط على Validate

11-Purchase Analysis:

• الخطوات:

1. الوصول إلى التقارير:

▪ من وحدة المشتريات، اختر Reports.

2. اختيار تقرير تحليل المشتريات:

▪ اضغط على Purchase Analysis واختر الفلاتر المناسبة لتحليل البيانات.

3. عرض وتصدير التقرير:

▪ عرض البيانات في شكل رسوم بيانية أو جداول، ثم اضغط على Export لحفظ التقرير

Inventory Module

1- Inventory Dashboard

The screenshot shows the Odoo Inventory Dashboard. At the top, there's a navigation bar with links for Inventory, Overview, Operations, Products, Reporting, and Configuration. Below the navigation is a search bar labeled "Search...". The main area contains eight cards arranged in a grid of two rows and four columns. Each card represents an operation type across two warehouses:

- Receipts**: Al Ansar (0 To Process)
- Internal Transfers**: Al Ansar (0 To Process)
- Delivery Orders**: Al Ansar (0 To Process)
- Receipts**: Al Ansar 2 (0 To Process)
- Internal Transfers**: Al Ansar 2 (0 To Process)
- Delivery Orders**: Al Ansar 2 (0 To Process)

On the right side of the dashboard, there are icons for Help, Logout, and a user profile. A page number indicator "1-6 / 6" is also present.

The basic inventory dashboard shows the available warehouses ,

In our case there are two warehouses (Al Ansar , Al Ansar 2) including three types of operations.

Below each operation it's current status as an alert for the user to deal with it.

- Receipts : the upcoming products
- Delivery Orders : the Outgoing products
- Internal : any transfer between company's warehouses

2- Inventory Receipts

The screenshot shows the 'Inventory Overview' page for 'Al Ansar: Receipts'. The top navigation bar includes 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The main search bar has 'Operation Type' set to 'Al Ansar: Receipts', 'Status' set to 'Done', and a placeholder 'Search...'. Below the search bar, there are buttons for 'New', 'Print', 'Copy', 'Delete', and a refresh icon. The list view displays two entries:

Reference	From	To	Contact	Scheduled Date	Source Document	Status
Cancelled (1)						
Done (2)						
WH/IN/00001	Partners/Vendors	WH/Stock	أي تكنولوجيا		P00005	Done
WH/IN/00002	Partners/Vendors	WH/Stock	التكولوجيا الحديثة		P00006	Done

Users Can Manage Received products and filter the receipts by it's current status also view the warehouse that will have the received products.

3- Inventory Delivery Orders

The screenshot shows the 'Inventory Overview' page for 'Al Ansar: Delivery Orders'. The top navigation bar and search interface are identical to the Receipts module. The list view displays one entry:

Reference	From	To	Contact	Scheduled Date	Source Document	Status
WH/OUT/00001	WH/Stock	Partners/Customers	الذوبان		S00002	Done

Users Can Manage Delivered products and filter the deliveries by its current status also view the warehouse that will deliver the products.

4- Internal Transfers

The screenshot shows the Odoo Internal Transfers module. At the top, there's a navigation bar with links like Inventory, Overview, Operations, Products, Reporting, and Configuration. Below the navigation is a search bar with a placeholder 'Search...'. The main area displays a table with one record:

Reference	From	To	Contact	Scheduled Date	Source Document	Status
WH/INT/00001	WH/Stock	WH 2	Mark Micheal			<button>Done</button>

Internal transfers manages the operations between different warehouses

5- Products

The screenshot shows the Odoo Products module. At the top, there's a navigation bar with Sales, Orders, To Invoice, Products, Reporting, and Configuration. Below the navigation is a search bar with a placeholder 'Search...' and a filter dropdown set to 'Can be Sold'. The main area displays a grid of product cards:

HP Designjet T2600 Price: 70,000.00 LE On hand: 0.0 Units	Black ink cartridge Hp T790 Price: 1,000.00 LE On hand: 0.0 Units	Canon CL-446 Colour Ink Cartridge Price: 1,300.00 LE On hand: 0.0 Units	Canon Image Press C700 Price: 50,000.00 LE On hand: 4.0 Units
Canon Oce ColorWave 650 Price: 80,000.00 LE On hand: 4.00 Units	Canon PIXMA GI-490 Ink Bottles - 4 Pcs Price: 1,100.00 LE On hand: 0.0 Units	EPSON L14150 Price: 25,000.00 LE On hand: 0.00 Units	EPSON L3250 Price: 20,000.00 LE On hand: 5.00 Units
Epson Ink bottle Black - T6641 Price: 1,000.00 LE On hand: 0.0 Units	Epson Setup Ink Cartridge Set Price: 1,600.00 LE On hand: 0.0 Units	HP 652 Black Price: 1,000.00 LE On hand: 0.00 Units	HP DesignJet T1700 Price: 60,000.00 LE On hand: 0.00 Units
Ricoh MP C8002 Price: 47,000.00 LE On hand: 0.00 Units	Ricoh Pro C5100 Price: 55,000.00 LE On hand: 0.00 Units	Ricoh black toner cartridge C430/431 Price: 1,200.00 LE On hand: 0.00 Units	Toner Refill for all Ricoh color printers Price: 800.00 LE On hand: 0.00 Units
Xerox 3655 Black Toner Cartridge Price: 900.00 LE On hand: 0.0 Units	Xerox Color 550 Price: 80,000.00 LE On hand: 0.0 Units	Xerox DocuColor 240 Price: 55,000.00 LE On hand: 0.00 Units	Xerox WorkCentreToner Cartridge Price: 1,200.00 LE On hand: 0.00 Units

This view shows the defined products along with their sale price and their quantity on hand (which is the amount that is available in the warehouse)

6- Stock

The screenshot shows the Odoo Stock module. On the left, there are two sidebar menus: 'WAREHOUSES' (listing 'All Warehouses', 'AI Ansar', and 'AI Ansar 2') and 'CATEGORY' (listing various product categories like 'Accessories / CANON', 'Accessories / EPSON', etc.). The main area displays a table of products with the following columns: Product, Unit Cost, Total Value, On Hand, Free to Use, Incoming, and Outgoing. Each row also has a checkbox, a history/replenishment button, and a locations button. A search bar at the top right allows filtering by product name.

	Product	Unit Cost	Total Value	On Hand	Free to Use	Incoming	Outgoing		
<input type="checkbox"/>	HP Designjet T2600	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	Black ink cartridge Hp T790	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	Canon CL-446 Colour Ink Cartridge	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	Canon Image Press C700	45,000.00 LE	180,000.00 LE	Edit	4.00	Edit	4.00	History	Replenishment
<input type="checkbox"/>	Canon Oce ColorWave 650	70,000.00 LE	-280,000.00 LE	Edit	-4.00	Edit	-4.00	History	Replenishment
<input type="checkbox"/>	Canon PIXMA GI-490 Ink Bottles - 4...	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	EPSON L14150	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	EPSON L3250	14,912.28 LE	44,736.84 LE	Edit	3.00	Edit	3.00	History	Replenishment
<input type="checkbox"/>	Epson Ink bottle Black - T6641	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	Epson Setup Ink Cartridge Set	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	HP 652 Black	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	HP DesignJet T1700	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment
<input type="checkbox"/>	Rinnh MP C800	0.00 LE	0.00 LE	Edit	0.00	Edit	0.00	History	Replenishment

Users can view every product on hand quantity based on location , Also can filter products by product category , warehouse and product type.

7- Product Category

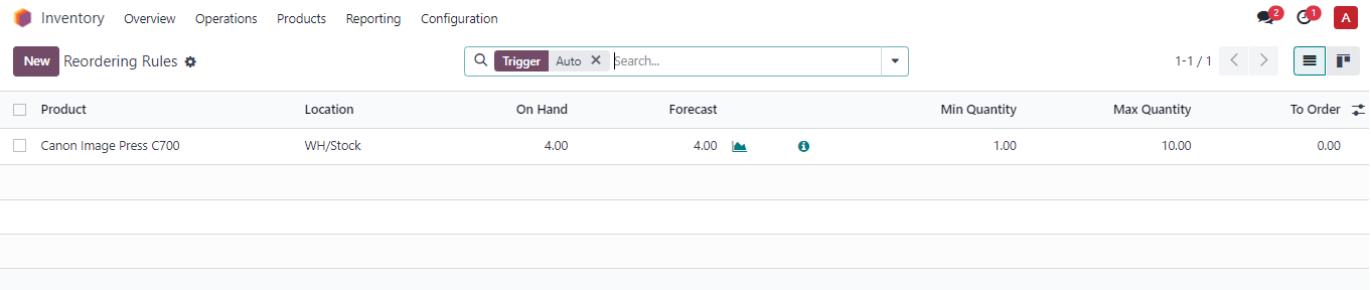
The screenshot shows the Odoo Product Categories module. The left sidebar lists the same categories as the Stock module. The main area displays a table of product categories with a single column labeled 'Product Category'. A search bar at the top right allows filtering by category name, and a 'Last Updated by' dropdown provides a filter for the person who last updated each category.

Product Category	
<input type="checkbox"/>	Accessories / CANON
<input type="checkbox"/>	Accessories / EPSON
<input type="checkbox"/>	Accessories / HP
<input type="checkbox"/>	Accessories / RICOH
<input type="checkbox"/>	Accessories / Xerox
<input type="checkbox"/>	Ink / CANON
<input type="checkbox"/>	Ink / EPSON
<input type="checkbox"/>	Ink / HP
<input type="checkbox"/>	Ink / RICOH
<input type="checkbox"/>	Ink / Xerox
<input type="checkbox"/>	Printers / CANON
<input type="checkbox"/>	Printers / EPSON
<input type="checkbox"/>	Printers / HP
<input type="checkbox"/>	Printers / RICOH
<input type="checkbox"/>	Printers / Xerox

Product categories not only categorize products with same properties , it's used to set the Stock valuation by using costing method as average or standard pricing .

Also accounting income and expense accounts are defined per Category.

8- Reordering Rules



The screenshot shows the Odoo Reordering Rules interface. At the top, there are navigation links: Inventory, Overview, Operations, Products, Reporting, Configuration, and a user icon with notifications (2 messages, 1 alert, 1 task). Below the header is a search bar with the placeholder 'Search...' and a dropdown menu set to 'Trigger Auto'. The main area displays a table with one row of data:

Product	Location	On Hand	Forecast	Min Quantity	Max Quantity	To Order
Canon Image Press C700	WH/Stock	4.00	4.00	1.00	10.00	0.00

Users can set a purchase order for any product automatically if the current stock reaches a minimum level that is used to be defined along with the maximum quantity that should be the quantity on hand.

9 – Warehouses



The screenshot shows the Odoo Warehouses interface. At the top, there are navigation links: Inventory, Overview, Operations, Products, Reporting, Configuration, and a user icon with notifications (2 messages, 1 alert, 1 task). Below the header is a search bar with the placeholder 'Search...' and a dropdown menu set to 'Search...'. The main area displays a table with two rows of data:

Warehouse	Location Stock	Address
AI Ansar	WH/Stock	AI Ansar
AI Ansar 2	WH 2/Stock	AI Ansar

Warehouse is used to be a subsidiary to main warehouse , by using the internal operations , users can transfer storables products to each warehouse . Also they can define multiple locations for each warehouse.

Sales Module

How to Create sales Orders Quotation

Orders>> Quotations

Add Information, Add a section

>> send By Email>> Confirm

S00009

Customer: Cairo, Cairo 14243, Egypt

Order Date: 10/10/2024 19:25:13

Payment Terms

Product	Description	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	Tax excl.
Canon	Canon PIXMA GI-490 Ink Bottles - 4 Pcs	1.00	0.00	0.00	1,100.00		0.00	1,100.00 LE
Canon	Canon Oce ColorWave 650	1.00	0.00	0.00	80,000.00		0.00	80,000.00 LE
Epson	EPSON L14150	1.00	0.00	0.00	25,000.00		0.00	25,000.00 LE
Epson	EPSON L3250	1.00	0.00	0.00	20,000.00		0.00	20,000.00 LE

Discount

Total: 126,100.00 LE

Margin: 19,287.72 LE (15.3%)

Pdf Quote, Quotation / Order

S00009

Customer: Cairo, Cairo 14243, Egypt

Order Date: 10/10/2024 19:25:13

Payment Terms

Product	Description	Quantity	Delivered	Invoiced
Canon	Canon PIXMA GI-490 Ink Bottles - 4 Pcs	1.00	0.00	0.00

الراچي
 Cairo
 Cairo 14243
 Egypt

Order # S00009

Order Date:
 10/10/2024

Salesperson:
 Ahmed

DESCRIPTION	QUANTITY	UNIT PRICE	TAXES	AMOUNT
Canon				
Canon PIXMA GI-490 Ink Bottles - 4 Pcs	1.00 Units	1,100.00		1,100.00 LE
Canon Oce ColorWave 650	1.00 Units	80,000.00		80,000.00 LE
Subtotal				81,100.00 LE
Epson				
EPSON L14150	1.00 Units	25,000.00		25,000.00 LE
EPSON L3250	1.00 Units	20,000.00		20,000.00 LE
Subtotal				45,000.00 LE
Total				126,100.00 LE

Create Margin

Configuration>>Setting>>Margins

Product	Quantity	Unit Price	Amount
Canon Image Press C700	1.00	50,000.00	50,000.00 LE
Canon Image Press C700	1.00	50,000.00	50,000.00 LE
EPSON L3250	1.00	20,000.00	20,000.00 LE

Total: 118,500.00 LE
 Margin: 5,254.38 LE (4.43%)

Create Pricelists

Configuration>> Settings>>Pricelist

Sales Orders To Invoice Products Reporting Configuration

Pricelists Set multiple prices per product, automated discounts, etc.

- Multiple prices per product
- Advanced price rules (discounts, formulas)

Margins Show margins on orders

Customer Account Let your customers log in to see their documents

- On invitation
- Free sign up

Products>>Pricelist

PRICE COMPUTATION

Computation Fixed Price
 Discount
 Formula

Based on? Sales Price

Discount? 15.00 %

Extra Fee? 0.00

Rounding Method? 0.00

Margins? 20,000.00 → 40,000.00

CONDITIONS

Apply On? All Products
 Product Category
 Product
 Product Variant

Min. Quantity? 10.00
Validity?

Create Discounts & Gift Card

Pricing

Discounts Grant discounts on sales order lines

Pricelists Set multiple prices per product, automated discounts, etc.

- Multiple prices per product
- Advanced price rules (discounts, formulas)

Discounts, Loyalty & Gift Card Manage Promotions, coupons, loyalty cards, Gift cards & eWallet

Customer Account Let your customers log in to see their documents

- On invitation
- Free sign up

Products>>Discount & loyalty>>NEW (Add Information)>>Generate Coupons

(Coupons Discounts) Products>>Discount & loyalty>>New

New Discount & Loyalty October 5 % Discount

Generate Coupons

Program Name
October 5 % 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 **Add** **Rewards** **Add**

If minimum 1 item(s) bought
5.00% discount on your order
Activate Windows

Coupons

New Generate Coupons Discount & Loyalty / October 5 % Discount Coupons

Code	Balance	Expiration Date	Program	Partner	Send
0447-b66f-4350	1 Coupon point(s)	10/17/2024	October 5 % Discount		
0442-2c15-4061	1 Coupon point(s)	10/17/2024	October 5 % Discount		
0447-d18b-429d	1 Coupon point(s)	10/17/2024	October 5 % Discount		
0441-2de9-47fa	1 Coupon point(s)	10/17/2024	October 5 % Discount		

Coupon Code

New / October 5 % Discount / Coupons
October 5 % Discount: 0447-d18b-429d

Code 0447-d18b-429d

Expiration Date 10/17/2024

Partner

Balance 1.00 **Coupon point(s)**

Add Coupon in Sales quotation

New Quotations 500012

Customer الشوقي 94545 طنطا Egypt

Expiration 11/10/2024

Pricelist Default EGP pricelist (EGP)

Payment Terms

Order Lines **Optional Product** Enter Promotion or Coupon Code

Product Canon Oce ColorWave 650

Coupon Code 0447-d18b-429d

Apply **Discard**



This screenshot shows a sales order line for a Canon Oce ColorWave 650. The quantity is 1.00, unit price is 80,000.00 LE, and taxes are 0.00. A discount row shows '5% on your order' with a value of -4,000.00. The total line amount is 76,000.00 LE. At the bottom, there are buttons for 'Coupon Code', 'Promotions', and 'Discount'.

Product	Description	Quantity	Unit Price	Taxes	Disc.%	Tax excl.
Canon Oce ColorWave 650	Canon Oce ColorWave 650	1.00	80,000.00	0.00	80,000.00 LE	
5% on your order	Discount: 5% on your order	1.00	-4,000.00	0.00	-4,000.00 LE	

Total: **76,000.00 LE**

Margin: 6,000.00 LE (7.89%)

Shipping Methods

Configurations>>Settings>>Delivery Methods

The sidebar shows 'Sales' as the active tab. The main area is titled 'Shipping' and contains a section for 'Delivery Methods'. It lists three options: 'UPS Connector' (checked), 'DHL Express Connector' (unchecked), and 'FedEx Connector' (unchecked). Each option has a description below it.

Configurations>>Shipping Methods>>new

The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The 'Configuration' tab is active. On the left, under 'New', there's a 'Shipping Methods' section with three items: 'Delivery Method' (unchecked), 'Standard delivery' (unchecked), and 'Cairo Transportation' (unchecked). A dropdown menu on the right lists various configuration categories: Settings, Sales Teams, Sales Orders, Shipping Methods (selected), Tags, Products, Attributes, Product Categories, Online Payments, Payment Providers, Payment Methods, and Activity Plans.

Shipping Method

Cairo Transportation

Provider Fixed Price

[Install more Providers](#)

Fixed Price LE500.00

Free if order amount is above ?

Delivery Product Transportation

Destination Availability

Description

Filling this form allows you to filter delivery carriers according to the delivery address of your customer.

Countries

States

Zip Prefixes ?

Please select a country before choosing a state or a zip prefix.

Quotations>>Add Shipping

Order Lines	Optional Products	Product	Shipping Method	Total Order Weight	Cost	Disc.%	Tax excl.
Canon Image Press C700			Cairo Transportation	0.00	500.00 LE	0.00	150,000.00 LE
Add a product	Add a section						

Add **Discard**

Order Lines	Optional Products	Other Info	Product	Description	Quantity	Unit Price	Taxes	Disc.%	Tax excl.
Canon Image Press C700			Canon Image Press C700	Canon Image Press C700	3.00	50,000.00		0.00	150,000.00 LE
Transportation			Cairo Transportation		1.00	500.00		0.00	500.00 LE
Add a product	Add a section	Add a note	Catalog						

Order to invoice

S00017

Customer: ٩٤٥٣٩ القاهرة Egypt

Order Date: 10/15/2024 04:05:23

Pricelist: Default EGP pricelist (EGP)

Payment Terms

Order Lines	Other Info	Product	Description	Quantity	Invoiced	Unit Price	Taxes	Disc.%	Payment Terms
		Canon Oce ColorWave 650	Canon Oce ColorWave 650	1.00	0.00	80,000.00		0.00	

To invoice>>Order to Invoice

Sales	Orders	To Invoice	Products	Reporting	Configuration	
Orders to Invoice						Search...
Number	Order Date	Customer	Salesperson	Activities	Total	Invoice Status
S00017	10/15/2024 04:05:23	العاشرة	A Ahmed	Order Upsell	80,000.00 LE	To Invoice
80,000.00 LE						

Order To Upsell

New	Quotations	S00020		Delivery 1	Invoices 1		1 / 1	< >
						Quotation	Quotation Sent	Sales Order
S00020								
Customer	الاسكندرية للمعادن		Order Date	10/15/2024 05:10:22				
	94543	الأقصر	Pricelist	Default EGP pricelist (EGP)				
	Egypt		Payment Terms					
Order Lines	Other info							
Product	Description	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	Tax excl.
Canon Image Press C700	Canon Image Press C700	1.00	0.00	1.00	50,000.00		0.00	50,000.00 LE

Create invoice

I validate (2)

Operations	Additional Info	Note
Product	Demand	Quantity
Canon Image Press C700	1.00	2.00

Sales	Orders	To Invoice	Products	Reporting	Configuration	
Orders to Upsell						Search...
Number	Order Date	Customer	Salesperson	Activities	Total	Invoice Status
S00020	10/15/2024 05:10:22	الاسكندرية للمعادن	A Ahmed	Order Upsell	50,000.00 LE	Upselling Opportunity
50,000.00 LE						

Operations	Additional Info	Note
Product	Demand	Quantity
Canon Image Press C700	1.00	2.00
Canon Image Press C700	1.00	50,000.00
50,000.00 LE		

Invoice

Orders to Upsell / S00020
INV/2024/00005

Sale Orders 1 / 1 < >

Customer Invoice

INV/2024/00005

Customer	الاسكندرية للمعادن 94543 Egypt	Invoice Date	10/15/2024
		Payment Reference	INV/2024/00005
		Due Date	10/15/2024
		Journal	Customer Invoices

Invoice Lines **Journal Items** **Other Info**

Product	Label	Account	Quantity	Price	Taxes	Tax excl.
Canon Image Press C700	Canon Image Press C700	4031 Product Sales (Canon Printers)	1.00	50,000.00		50,000.00 LE

Create Discounts:

Settings>> Check Discounts

Sales Orders To Invoice Products Reporting Configuration

Save **Discard** **Settings** **Unsaved changes** **Search...**

Pricing

- Discounts** Grant discounts on sales order lines
- Promotions, Loyalty & Gift Card** Manage Promotions, Coupons, Loyalty cards, Gift cards & eWallet
- Pricelists** Set multiple prices per product, automated discounts, etc.
- Margins** Show margins on orders

Orders>> Quotations>> New

Sales Orders To Invoice Products Reporting Configuration

New **Quotations** S0005

S0005

Customer	الجاصدة 94539 Egypt	Expiration	11/09/2024
		Payment Terms	30 Days

Order Lines **Optional Products** **Other Info**

Product	Description	Quantity	Unit Price	Disc.%	Tax excl.
EPSON L14150	EPSON L14150	5.00	25.000.00	10.00	112,500.00 LE

Add a product Add a section Add a note Catalog

Discount

Total: **112,500.00 LE**

Terms and conditions...

Lock Confirmed Sales

Sales Orders To Invoice Products Reporting Configuration

Save Discard Settings Unsaved changes Search...

General Settings CRM Sales

Lock Confirmed Sales
No longer edit orders once confirmed

New Quotations S00006 Delivery 1 / 1 < >

Create Invoice Send by Email Unlock Preview Quotation Quotation Sent Sales Order

S00006

Customer: الاسكندرية للمعادن
الأنفصار
94543 Egypt

Order Date: 10/10/2024 01:13:04
Payment Terms: 15 Days

Locked

sale Warnings Messages (Customers, Products)

Settings>> sale Warnings

Save Discard Settings Search...

General Settings CRM

Sale Warnings
Get warnings in orders for products or customers

Orders>> Customers>> Internal Notes>> warning on the Purchase Order>> Warning>> (Warning, Blocking Messages)

Sales Orders To Invoice Products Reporting Configuration

New Customers الখوبن

Meetings 0 Opportunities 0 Sales \$ 3 Purchases 0 More

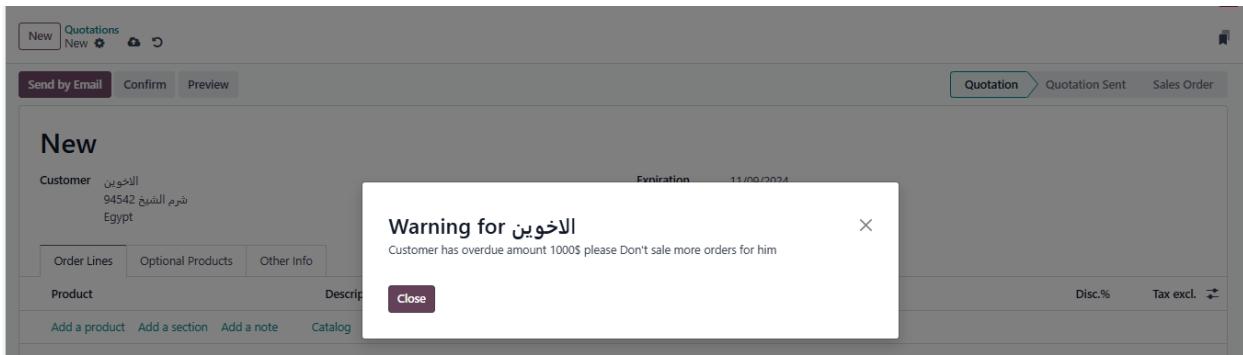
Contacts & Addresses Sales & Purchase Accounting Internal Notes

Internal notes...

WARNING ON THE SALES ORDER

Warning

Customer has overdue amount 1000\$ please Don't sale more orders for him



Products>> Products>> Sales>> Warning When selling this product>> Warning>>(Warning, Blocking Messages)

Product Name: HP Designjet T2600

General Information Attributes & Variants Sales Purchase Inventory Accounting

UPSELL & CROSS-SELL

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

SALES DESCRIPTION

WARNING WHEN SELLING THIS PRODUCT

Warning i Blocking Message

Message don't sale From Product

Quotations S00007

Customer: Egypt 94545 طنطا Egypt

Order Lines Optional Products Other Info

Product Description

Type to find a product...

Add a product Add a section Add a note Catalog

Close

Expiry: 11/09/2024

Disc.% Tax excl.

Sales Reporting

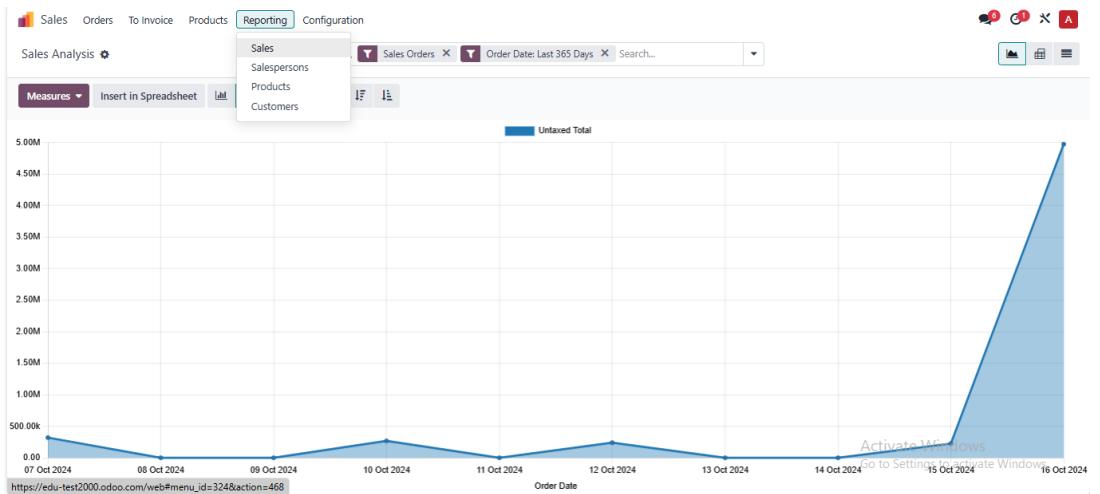
Quotations>> (Group By Or Filter)>>SalesPerson

The screenshot shows the Odoo Sales Quotations module. It displays several open sales orders across three tabs:

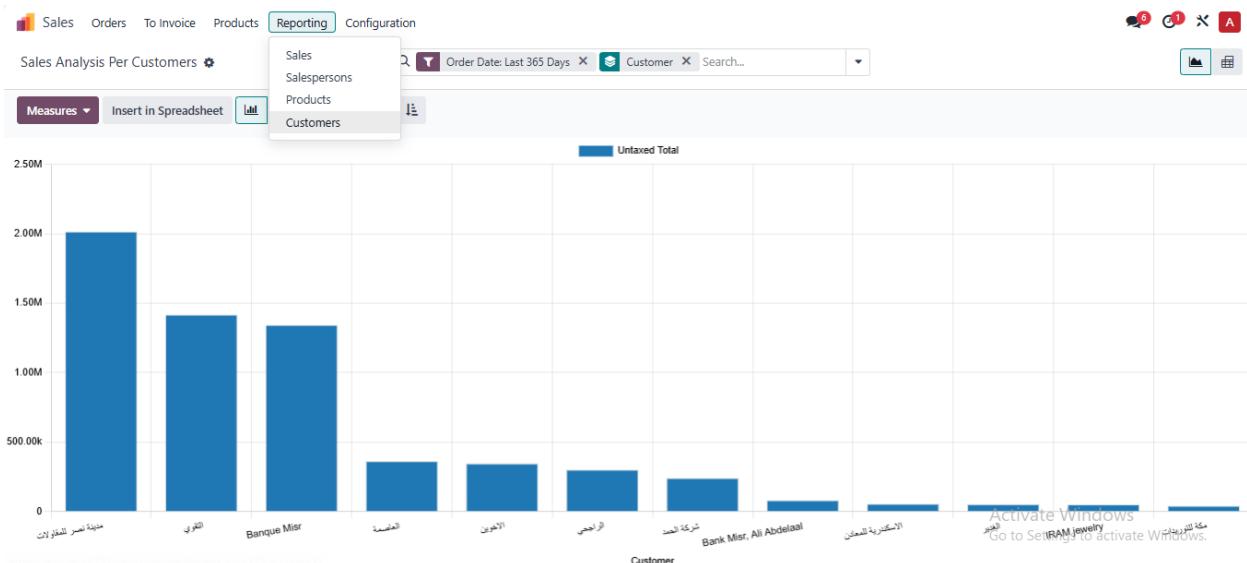
- Ahmed** tab (left): Shows 14 sales orders. One order to "مدينة نصر للمقاولات" worth 17,250.00 LE and another to "مدينة نصر للمقاولات" worth 460,000.00 LE.
- Maha SP3** tab (middle): Shows 3 sales orders. One to "IRAM jewelry" worth 57,500.00 LE and another to "العذير" worth 17,250.00 LE.
- Mostafa** tab (right): Shows 2 sales orders. One to "Bank Mi" worth 500,000.00 LE.

Filters and Group By options are visible on the left side of the interface.

Reporting>>Sales



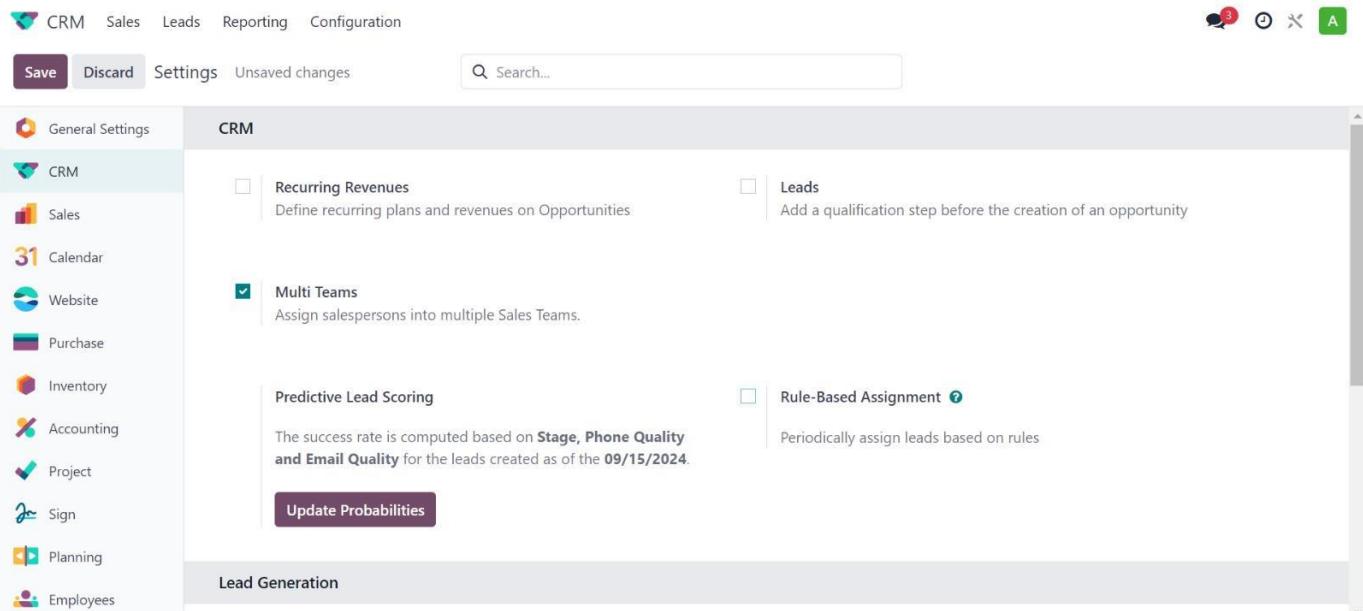
Reporting>>Customers



CRM Module

اولا : تفعيل CRM في Multi teams
الخطوات :

CRM > Configuration > Settings > Multi Teams



ثانيا : Sales teams
اضافة Team leaders و Salespersons
الخطوات :

1. اضافة Team Leader و تفعيل صلاحيات ادارة المجموعة :

Settings > Users & companies > Users > New •

• تفعيل ميزة Sales في Administrator مع الحرص على عدم اعطاء صلاحيات في الاقسام الاخرى

The screenshot shows the Odoo 'Users & Companies' module. A user named 'Mostafa' is being created. In the 'Access Rights' tab, under the 'SALES' section, 'Sales' and 'Sign' are listed as 'Administrator'. Under the 'SERVICES' section, 'Appointment' and 'Project' are listed as 'User'. Other tabs like 'Preferences' and 'Account Security' are also visible.

2. اضافة وتفعيل صلاحياتهم Team Members

Settings > Users & companies > Users > New •

• تفعيل ميزة Sales في User : Documents

The screenshot shows the Odoo 'Users & Companies' module. A user named 'Maha SP3' is being created. In the 'Access Rights' tab, under the 'SALES' section, 'Sales' is listed as 'User: All Documents' and 'Sign' is listed as 'User: Own Templates'. Under the 'SERVICES' section, 'Appointment' and 'Project' are listed as 'User'. Other tabs like 'Preferences' and 'Account Security' are also visible.

الخطوات :

CRM > Configuration > sales teams

يتم الضغط على new و من ثم ملئ البيانات الخاصه بها و يتم اختيار قائد الفريق وايضا اضافه الاعضاء

The screenshot shows the Odoo CRM interface for configuring sales teams. The top navigation bar includes CRM, Sales, Leads, Reporting, Configuration, and a message icon with 3 notifications. The current page is 'Sales Teams' under 'Cairo Sales Team'. The main content area is titled 'Assign Leads' and displays the details for the 'Cairo Sales Team'. It shows the team leader is 'Yassier Sales Admin 3' and the email alias is 'acc.hassan.sayed'. The team accepts emails from everyone and has an invoicing target of 'LE400,000.00 / Month'. The 'ASSIGNMENT RULES' section indicates 4 leads assigned this month on a maximum of 120, with a domain rule matching all records. Below this, there are tabs for 'Members' and an 'Add' button. A list of team members is shown: Rana SP1, Aya SP2, hassan, and another unnamed member. Each member has a lead assignment status of 'Leads (30 days)'.

ثالثا : يتم عمل leads

CRM > Leads

يتم الضغط على new و ملئ البيانات الخاصه بها و ايضا يتم اختيار مسؤول المبيعات و اختيار فريق المبيعات

New Leads RadioShack Egypt

Convert to Opportunity Lost

RadioShack Egypt

Probability

91.67 %

Company Name [?] RadioShack Egypt

Contact Name

Title

Address 79 Mossadak, Ad Doqi, Giza Governorate, Egypt

Email info@radioshack.com.eg

Street 2...

Job Position

City

State

ZIP

Phone

Egypt

Mobile

Website [?] https://www.radioshack.com.eg

Priority ★★☆

Language

Tags [?]Salesperson  Maha SP3

Sales Team Cairo Sales Team

ومن ثم نضغط على Convert to Opportunity > Create Opportunity

Convert to opportunity

Conversion Action Convert to opportunity Merge with existing opportunities

ASSIGN THIS OPPORTUNITY TO

Salesperson Maha SP3

Sales Team Luxor Team

CUSTOMER

 Create a new customer Link to an existing customer Do not link to a customer**Create Opportunity**

Cancel

ومن ثم يتم ملئ البيانات الخاصة بالفرصه القائمه كال التالي سواء

هناك عده مراحل \ Won \ Lost \ Qualified \ Proposition \ نقوم باختيار المناسب ل تلك الفرصة

The screenshot shows a CRM application interface. At the top, there are navigation links: CRM, Sales, Leads, Reporting, Configuration. Below the header, there's a toolbar with buttons for New, Leads / RadioShack Egypt, and a search bar. On the right side of the toolbar are icons for notifications (3), user profile, and other settings.

The main content area displays a lead record for "RadioShack Egypt". The lead details include:

- Expected Revenue: LE200,000.00 + LE1,000.00 Monthly
- Probability: at 91.67 %
- Customer: RadioShack Egypt
- Email: info@radioshack.com.eg
- Phone: +20 128 923 7678
- Salesperson: Maha SP3
- Expected Closing: 10/22/2024
- Rating: ★★☆
- Tags: (empty)

Below the lead details, there are two tabs: Internal Notes and Extra Information. A placeholder text "Add a description..." is visible.

At the bottom of the lead record, there are buttons for New Quotation, Won, Lost, and a status dropdown showing "Qualified 1d". To the right of the status dropdown are buttons for Proposition, Won, and Lost.

و من ثم نضغط على New Quotation و من بعدها نقوم ب اضافه المنتجات , الكميه , الضرائب , ومن ثم نقوم بالاختيار فترة السداد و نقوم بالضغط على Confirm

New ... / RadioShack Egypt / RadioShack Egypt
New

New

Customer	RadioShack Egypt 79 Mossadak, Ad Doqi, Giza Governorate, Egypt	Expiration	11/17/2024																										
Pricelist	Default EGP pricelist (EGP)																												
Payment Terms	15 Days																												
<table border="1"> <tr> <td>Order Lines</td> <td>Optional Products</td> <td>Other Info</td> <td></td> </tr> <tr> <td colspan="4"> <table border="0"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Quantity</th> <th>Unit Price</th> <th>Taxes</th> <th>Disc.%</th> <th>Tax excl.</th> </tr> </thead> <tbody> <tr> <td>Canon Oce ColorWave 650</td> <td>Canon Oce ColorWave 650</td> <td>2.00 </td> <td>80,000.00</td> <td>14% Cash Basis </td> <td>1% S </td> <td>0.00 160,000.00 LE </td> </tr> </tbody> </table> </td> </tr> <tr> <td colspan="4"> Add a product Add a section Add a note Catalog </td> </tr> </table>				Order Lines	Optional Products	Other Info		<table border="0"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Quantity</th> <th>Unit Price</th> <th>Taxes</th> <th>Disc.%</th> <th>Tax excl.</th> </tr> </thead> <tbody> <tr> <td>Canon Oce ColorWave 650</td> <td>Canon Oce ColorWave 650</td> <td>2.00 </td> <td>80,000.00</td> <td>14% Cash Basis </td> <td>1% S </td> <td>0.00 160,000.00 LE </td> </tr> </tbody> </table>				Product	Description	Quantity	Unit Price	Taxes	Disc.%	Tax excl.	Canon Oce ColorWave 650	Canon Oce ColorWave 650	2.00	80,000.00	14% Cash Basis	1% S	0.00 160,000.00 LE	Add a product Add a section Add a note Catalog			
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Add a product Add a section Add a note Catalog																													

سوف تتحول الى Sales order و من بعدها في حالة اصدار فاتوره نقوم بالضغط على Create invoice و من ثم نضغط Confirm و من ثم الضغط على Regular invoice

New ... / RadioShack Egypt / RadioShack Egypt
S00047



1 / 1 < >

Create Invoice

Send by Email	Unlock	Preview	Quotation	Quotation Sent	Sales Order
---------------	--------	---------	-----------	----------------	-------------

S00047

Customer	RadioShack Egypt 79 Mossadak, Ad Doqi, Giza Governorate, Egypt	Order Date	10/18/2024 00:07:28																															
Pricelist	Default EGP pricelist (EGP)																																	
Payment Terms	15 Days																																	
<table border="1"> <tr> <td>Order Lines</td> <td>Other Info</td> <td colspan="3"> Locked </td> </tr> <tr> <td colspan="5"> <table border="0"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Quantity</th> <th>Invoiced</th> <th>Unit Price</th> <th>Taxes</th> <th>Disc.%</th> <th>Tax excl.</th> </tr> </thead> <tbody> <tr> <td>Canon Oce ColorWave 650</td> <td>Canon Oce ColorWave 650</td> <td>2.00 </td> <td>0.00</td> <td>80,000.00</td> <td>1% S </td> <td>14% Cash Basis </td> <td>0.00 160,000.00 LE </td> </tr> </tbody> </table> </td> </tr> <tr> <td colspan="5"> Coupon Code Promotions Discount Add shipping </td> </tr> </table>				Order Lines	Other Info	Locked			<table border="0"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Quantity</th> <th>Invoiced</th> <th>Unit Price</th> <th>Taxes</th> <th>Disc.%</th> <th>Tax excl.</th> </tr> </thead> <tbody> <tr> <td>Canon Oce ColorWave 650</td> <td>Canon Oce ColorWave 650</td> <td>2.00 </td> <td>0.00</td> <td>80,000.00</td> <td>1% S </td> <td>14% Cash Basis </td> <td>0.00 160,000.00 LE </td> </tr> </tbody> </table>					Product	Description	Quantity	Invoiced	Unit Price	Taxes	Disc.%	Tax excl.	Canon Oce ColorWave 650	Canon Oce ColorWave 650	2.00	0.00	80,000.00	1% S	14% Cash Basis	0.00 160,000.00 LE	Coupon Code Promotions Discount Add shipping				
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Coupon Code Promotions Discount Add shipping																																		

CRM Sales Leads Reporting Configuration

New ... / RadioShack Egypt / S00047 Sale Orders 1 Draft Invoice 1 / 1 < >

Confirm **Preview** **Cancel** **Draft** **Posted**

RadioShack Egypt has reached its credit limit of: 100,000.00 LE
Total amount due (including this document): 184,000.00 LE

Customer Invoice

Draft

Customer	RadioShack Egypt 79 Mossadak, Ad Doqi, Giza Governorate, Egypt	Invoice Date	10/18/2024
		Payment Reference	?
		Payment terms	15 Days
		Journal	Customer Invoices

Invoice Lines Journal Items Other Info

Product	Label	Account	Quantity	Price	Taxes	Tax excl.
Canon Oce ColorWave 650	Canon Oce ColorWave 650	4031 Product Sales (Canon Printers)	2.00	80,000.00	1% S 14% Cash Basis	160,000.00 LE

Add a line Add a section Add a note

CRM Sales Leads Reporting Configuration

New ... / RadioShack Egypt / S00047 Sale Orders 1 INV/2024/00022 1 / 1 < >

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

Customer Invoice

INV/2024/00022

Customer	RadioShack Egypt 79 Mossadak, Ad Doqi, Giza Governorate, Egypt	Invoice Date	10/18/2024
		Payment Reference	?
		Payment terms	15 Days
		Journal	Customer Invoices

Invoice Lines Journal Items Other Info

Product	Label	Account	Quantity	Price	Taxes	Tax excl.
Canon Oce ColorWave 650	Canon Oce ColorWave 650	4031 Product Sales (Canon Printers)	2.00	80,000.00	1% S 14% Cash Basis	160,000.00 LE

إدارة الفرص الضائعة (Manage Lost Opportunities)

الهدف: إدارة وتحليل الفرص الضائعة لمعرفة أسباب عدم إتمام الصفقات.

الخطوات :

CRM > pipeline

يتم الضغط على الفرصة القائمة و من ثم نضغط من داخلها على lost

The screenshot shows a CRM pipeline interface. At the top, there are tabs for CRM, Sales, Leads, Reporting, and Configuration. Below that, a navigation bar includes 'New', 'Pipeline', 'RadioShack Egypt', and status indicators for 'No Meeting', 'Quotations 0', and 'Orders \$ 160,000.00 LE'. On the right, there are icons for a profile, notifications (3), and other settings.

The main area displays a single opportunity record for 'RadioShack Egypt'. The record details include:

- Expected Revenue:** LE200,000.00 + LE1,000.00
- Probability:** Monthly at 91.67 %
- Customer:** RadioShack Egypt
- Salesperson:** Maha SP3
- Email:** info@radioshack.com.eg
- Phone:** +20 128 923 7678
- Expected Closing:** 10/22/2024
- Tags:** (three star icon)

Below the record, there are tabs for 'Internal Notes' and 'Extra Information', with a placeholder 'Add a description...'. At the bottom, there is a large button labeled 'CRM > pipeline : lost'.

و هناك خطوه اخرى نقل الفرص لمرحلة lost

The screenshot shows a CRM pipeline interface with four stages: Qualified, Proposition, Won, and Lost. Each stage has its own summary and a list of opportunities.

- Qualified:** 290k + 3,500. Opportunities include:
 - شراء 4 ماكينات طباعة
 - 240,000.00 LE + 2,000.00 LE Monthly
 - Banque Misr
 - Correct
 - Aswan Sales Team
 - ☆☆☆ (rating)
- Proposition:** 150k + 2,000. Opportunities include:
 - شراء 5 طابعات كانون
 - 150,000.00 LE + 2,000.00 LE Monthly
 - الراجحي
 - Correct
 - Luxor Team
 - ☆☆☆ (rating)
- Won:** 0 + 0. Opportunities include:
 - شراء 18 احبار
 - 30,000.00 LE + 1,000.00 LE Monthly
 - Nofal
 - Incorrect
 - Cairo Sales Team
 - ☆☆☆ (rating)
- Lost:** 0 + 0. Opportunities include:
 - شراء 10 اخبار طباعة
 - 20,000.00 LE + 500.00 LE Monthly
 - العاشرة
 - Correct
 - Luxor Team
 - ☆☆☆ (rating)

و من ثم نقوم بتحديد اسباب فقدان الفرصة واضافتها او تعديلها من خلال :

CRM app > Configuration > Lost Reasons

و يمكن اضافة بعض التعديلات باستخدام Odoo Studio Module مثل تثبيت

kanban view لجعل الواجهة أكثر سهولة في وضع Group By Stage

Activity Plans

يمكننا عمل خطط مختلفة لآلية التواصل مع العملاء من خلال Activity plans
وذلك من خلال CRM>Configuration>Activity Plans

Name	Steps Count	Department
Name	2	
خطة تطوير البنوك	2	
خطة تسليم المنتج	4	

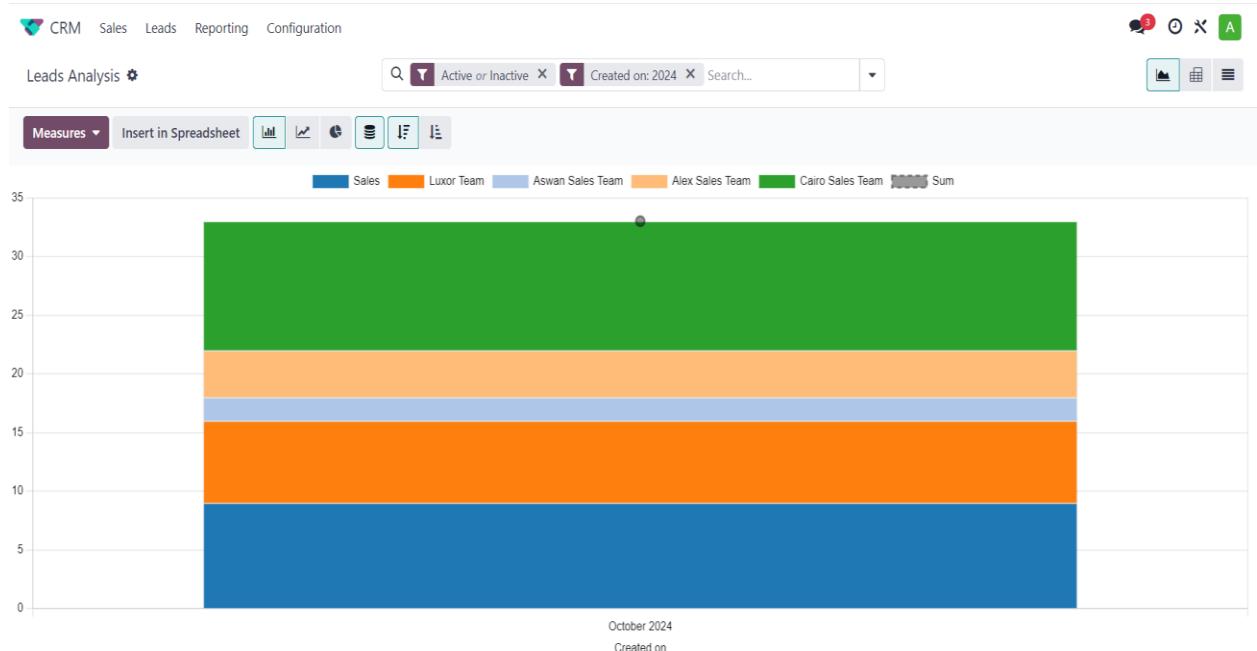
و من ثم يمكننا اضافة الية الخطة من خلال اضافة Lines و يمكننا ايضا تحديد الموظف المسؤول عن كل خطوة من خلال تحديد Assignment من خانة Default User

Activity Type	Summary	Assignment	Assigned to
To-Do	التأكد من توافر المنتج	Default user	Inventory
Meeting	تحديد موعد تسليم مع العميل	Ask at launch	hassan Accountant Ahmed Ali Aya SP2 Crm Inventory
To-Do	التأكد من تسليم المنتج للعميل	Ask at launch	
Upload Document	رفع صورة من اصل التعاقد مع العميل	Ask at launch	

و يمكن اضافة بعض التقارير : Reporting Leads :
الخطوات :

CRM < Reporting < Leads

و هذا التقرير يوضح جميع فرق المبيعات و فرص المبيعات المتعلقة بكل فريق



و بالامكان اختيار اي تقرير نريده لمعرفة اي شئ خاص بفرق المبيعات سواء Kpis او اي شئ اخر من خلال هذه الخطوه :

