

# Odoo Play 17

## Buy and Sell



A visual introduction to the basics of Odoo

Apmatic Publishing

Odoo Play 17 — Buy and Sell

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# Introduction

Welcome to Odoo Play, the visual guide that introduces the fundamental concepts of Odoo in a simple way. The goal is to illustrate step by step how Odoo allows you to manage the typical business situations which occur every day. The guide makes extensive use of screenshots: they are made at high resolution so as to be easily readable and therefore useful for the purpose.

## Sell and Buy

In this guide, we will see how to use Odoo to manage a simple sell and buy workflow, from purchasing a product from a supplier to selling the product to the customer.

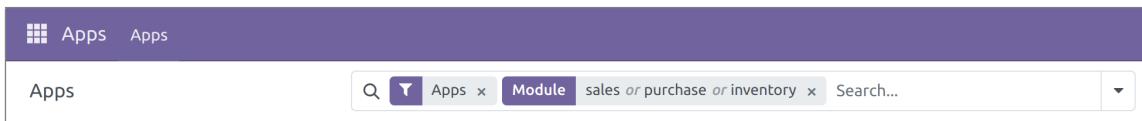
In fact, we will pretend to be the owners of Symbolic Vision, a retailer of high tech products including personal computers. Among our suppliers is TitanTech Systems, from which we purchase desktop PCs. One of our clients, the financial consultancy firm BlueSky Associates, needs a new computer and contacts us for a quote. The fictional events illustrated here take place during the month of January 2024.

The version of Odoo used in this guide is Odoo 17 Community. To begin with, we will have a brand new database available, without sample data. We are now ready to get started!

## 1. Install the required apps

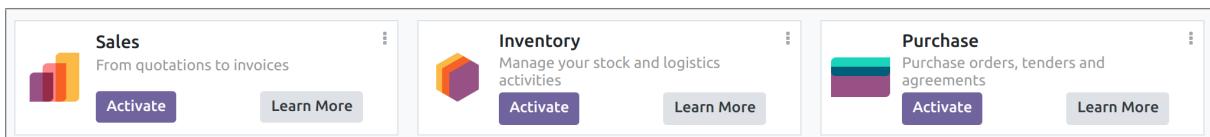
The apps we have to install are Sales, Purchase and Inventory. We can find them in the Apps menu and install each one by clicking on the Activate button, one at a time. But here we suggest a different approach.

We want to install all the required apps at the same time. To do that, start by selecting just these three apps doing a combined search.



A screenshot of the Odoo Apps search interface. The search bar contains the query "sales or purchase or inventory". The results show three modules: Sales, Inventory, and Purchase, each with an "Activate" button.

The view now shows only the Sales, Purchase and Inventory apps.



A screenshot of the Odoo Apps search results. It shows three modules: Sales, Inventory, and Purchase. Each module has a thumbnail, a name, a brief description, and two buttons: "Activate" and "Learn More".

Switch to the list view and select all of them.

Module Name	Author	Website	Latest Version	Status
Sales	Odoo S.A.	<a href="https://www.odoo.com/app/sales">https://www.odoo.com/app/sales</a>	17.0.1.0	Not Installed
Inventory	Odoo S.A.	<a href="https://www.odoo.com/app/inventory">https://www.odoo.com/app/inventory</a>	17.0.1.1	Not Installed
Purchase	Odoo S.A.	<a href="https://www.odoo.com/app/purchase">https://www.odoo.com/app/purchase</a>	17.0.1.2	Not Installed

On the toolbar, click Activate to install them in one shot.

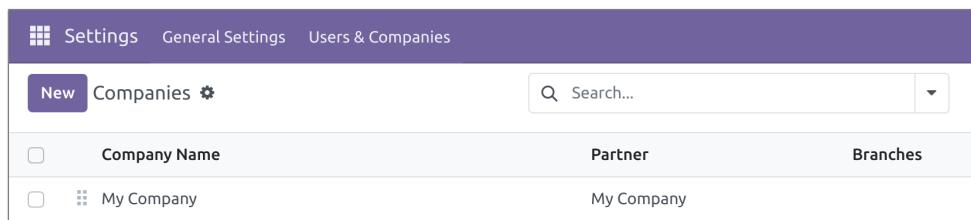


A screenshot of the Odoo Apps list view toolbar. It shows buttons for "3 selected", "Activate", "Upgrade", "Print", and "Actions". The "Activate" button is highlighted, indicating it is the current action being performed.

## 2. Configure the company

Our company is called *Symbolic Vision*. We have to update the name of the default company.

Go to Settings and click on User & Companies>Companies. Click on My Company to open the form view.



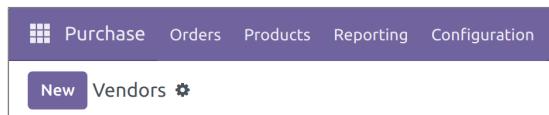
Set the Company Name and, optionally, the Email. In this guide, we are not concerned with the other fields.

A screenshot of the Odoo Company form view for 'Symbolic Vision'. The form has tabs for 'General Information' (selected) and 'Branches'. Under 'General Information', there are fields for 'Address' (Street, Street 2, City, State, ZIP), 'Phone' (Mobile, Email, Website, Email Domain), 'Tax ID', 'Company ID', 'Currency' (USD), and a 'Color' field which is currently empty. The 'Address' section shows 'United States' as the state.

### 3. Create a vendor

Before we create our first product, let's create the vendor *TitanTech Systems* that supplies that product.

Go to Purchase and click on Orders>Vendors. Click New.



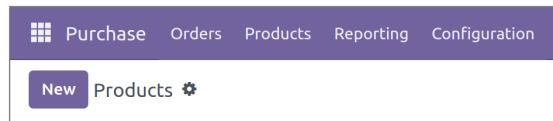
Set the vendor Name and, optionally, the Email.

The screenshot shows the "Create Vendor" form. At the top, there are two radio buttons: "Individual" (unchecked) and "Company" (checked). The company name "TitanTech Systems" is entered in the "Name" field. Below the name, there are fields for "Address" (Street, Street 2, City, State, ZIP, Country), "Phone" (Mobile, Email, Website, Tags), and "Tax ID" (example: BE0477472701). At the bottom of the form, there are tabs for "Contacts & Addresses", "Sales & Purchase", "Invoicing", and "Internal Notes". A large "Add" button is located at the bottom left of the form area.

## 4. Add a product

Now it is time to create the product *Desktop PC* that we will buy from TitanTech Systems. Its cost is 450\$ and we intend to sell it for 690\$.

Go to Purchase app and select Products>Products. Click New.



Set the Name of the product. In the General Information tab set Product Type to **Storable Product**: doing so we will be able to track the product's stock. Set also the Sales Price to 690\$ and the Cost to 450\$.

A screenshot of a product detail screen. At the top, it says "Product Name" and shows "Desktop PC" with a star icon. Below that are two checkboxes: "Can be Sold" and "Can be Purchased", both checked. To the right is a camera icon with a plus sign. The main area has tabs for "General Information", "Sales", "Purchase", "Inventory", and "Accounting". Under "General Information", "Product Type" is set to "Storable Product", "Sales Price" is \$690.00, and "Cost" is \$450.00. "Invoicing Policy" is set to "Ordered quantities". A note below states: "Storable products are physical items for which you manage the inventory level." A small blue vertical bar is to the left of the screenshot.

In the Purchase tab, click on **Add a line** and set Vendor, Price (which is equal to Cost), and Delivery Lead Time. We expect to receive this product 3 days after the confirmation of a purchase order, so the delivery lead time is 3.

General Information	Sales	Purchase	Inventory	Accounting
Vendor			Price	Delivery Lead Time
TitanTech Systems			450.00	3
Add a line				

In the Inventory tab set the Customer Lead Time to 2. This product is going to be shipped 2 days after the sale order confirmation.

General Information	Sales	Purchase	Inventory	Accounting
OPERATIONS			LOGISTICS	
<b>Routes</b> <small>?</small> <input checked="" type="checkbox"/> Buy <a href="#">View Diagram</a>			<b>Responsible</b> <small>?</small> <span style="border: 1px solid green; padding: 2px;">A</span>	Administrator
			<b>Weight</b>	0.00 kg
			<b>Volume</b>	0.00 m <sup>3</sup>
			<b>Customer Lead Time</b> <small>?</small> 2	days

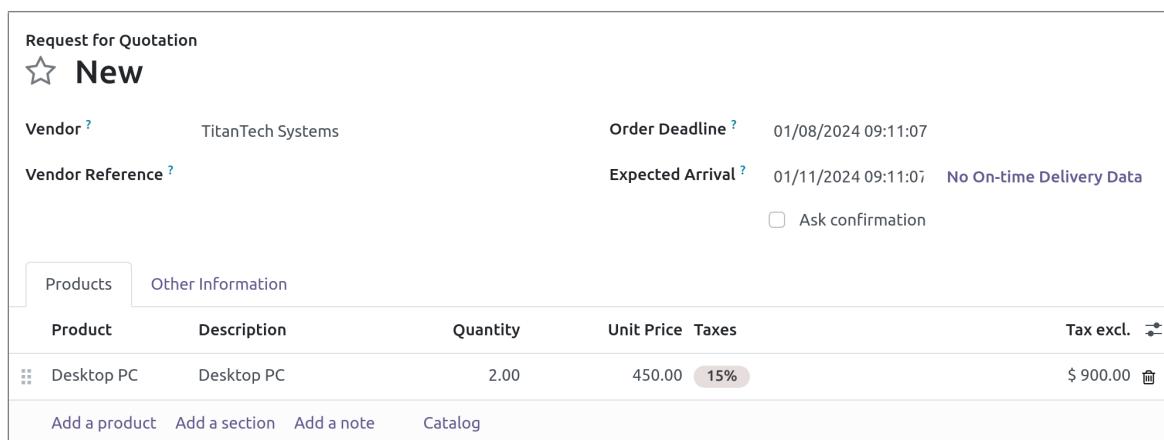
## 5. Buy products

On the morning of January 8, we are ready to create a purchase order for 2 Destop PCs.

Go to Purchase app and select Orders>Request for Quotation. Click New.



Set the Vendor and add a product line with 2 Desktop PCs. Notice that Odoo automatically sets the Order Deadline to the current date, and the Expected Arrival 3 days later.

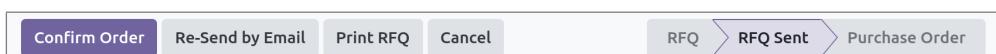


Product	Description	Quantity	Unit Price	Taxes	Tax excl.
Desktop PC	Desktop PC	2.00	450.00	15%	\$ 900.00

Optionally, send the request for quotation by email to the vendor by clicking on Send by Email.



The sales department of TitanTech Systems is very efficient: about one hour later we receive confirmation from the vendor, so we go ahead and click on Confirm Order.



The request for quotation is now the purchase order P00001; the Order Deadline is gone, replaced by a Confirmation Date set to the current date.



Vendor	TitanTech Systems	Confirmation Date	01/08/2024 10:08:40
Vendor Reference		Expected Arrival	01/11/2024 09:11:07

## 6. Receive products

On the morning of January 11, the Desktop PCs arrive at our warehouse.

Reopen the purchase order P00001: go to Purchase app, select Orders>Purchase Orders and click on it. Then click on Receive Products.



The receipt document is WH/IN/00001. We ordered 2 Desktop PCs and both arrived, so we leave the receipt as it is.

★ WH/IN/00001

Receive From ? TitanTech Systems      Scheduled Date ? 01/11/2024 09:11:07  
Deadline ? 01/11/2024 09:11:07  
Source Document ? P00001

Operations    Additional Info    Note

Product	Demand	Quantity	
Desktop PC	2.00	2.00	▲

Click on Validate: the receipt will change state, going from Ready to Done.



Notice that the Deadline date is replaced by the Effective Date, which is the date of the validation.

★ WH/IN/00001

Receive From ? TitanTech Systems      Scheduled Date ? 01/11/2024 09:11:07  
Effective Date ? 01/11/2024 08:44:50  
Source Document ? P00001

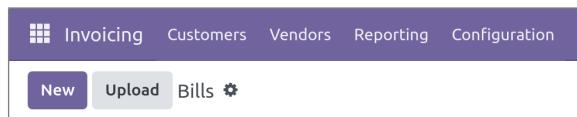
Operations    Additional Info    Note

Product	Demand	Quantity	
Desktop PC	2.00	2.00	▲

## 7. Register the vendor bill

The day after, January 12, we promptly receive the vendor's bill which we immediately register.

Go to Invoicing app and select Vendors>Bills. Click New.



Fill in the Vendor and the Bill Date, then click on Auto-Complete and select the P00001 purchase order: the product line will automatically be added.

Vendor Bill

**BILL/2024/01/0001**

Vendor ?	TitanTech Systems	Bill Date ?	01/12/2024
Bill Reference ?		Accounting Date ?	01/12/2024
Auto-Complete ?	Select a purchase order or an old bill	Payment Reference ?	
		Recipient Bank ?	
		Due Date ?	01/12/2024
			or Payment Terms

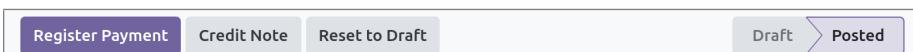
**Invoice Lines**    **Other Info**

Product	Label	Quantity	Price	Taxes	Tax excl.
Desktop PC	P00001: Desktop PC	2.00	450.00	15%	\$ 900.00

Click on Confirm: the bill will change state, going from Draft to Posted.



We decide to immediately record the payment. Click on Register Payment.



Finally, click on Create Payment.

**Register Payment**

Journal ?	Bank	Amount ?	\$ 1,035.00
Payment Method ?	Manual	Payment Date ?	01/12/2024
Recipient Bank Account ?		Memo ?	BILL/2024/01/0001
<input type="button" value="Create Payment"/> <input type="button" value="Discard"/>			

The bill is now paid.

**Vendor Bill**

**BILL/2024/01/0001**

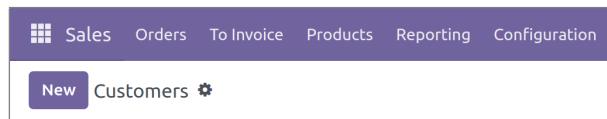
**PAID**

Vendor ?	TitanTech Systems	Bill Date ?	01/12/2024	
Bill Reference ?		Accounting Date ?	01/12/2024	
Payment Reference ?				
Recipient Bank ?				
Due Date ? 01/12/2024				
<input type="button" value="Invoice Lines"/> <input type="button" value="Other Info"/>				
Product	Label	Quantity	Price Taxes	Tax excl.
Desktop PC	P00001: Desktop PC	2.00	450.00	\$ 900.00
Terms and Conditions			Untaxed Amount:	\$ 900.00
			Tax 15%:	\$ 135.00
			Total:	<b>\$ 1,035.00</b>
Paid on 01/12/2024 \$ 1,035.00 Amount Due ?: \$ 0.00				

## 8. Create a customer

On January 16 the company *BlueSky Associates* asks us a quotation for a Desktop PC.

Before creating a quotation, let's create the customer. Go to Sales and click on Orders>Customers. Click New.



Set the customer Name and, optionally, the Email.

A screenshot of the Odoo Customer creation form. At the top left, there are radio buttons for 'Individual' and 'Company', with 'Company' selected. The customer name 'BlueSky Associates' is entered in the main field. Below the name, there are several input fields: 'Address' (Street...), 'Phone ?' (empty), 'Street 2...' (empty), 'Mobile ?' (empty), 'City' (empty), 'State' (empty), 'ZIP' (empty), 'Email ?' (info@blueskyassociates.com), 'Country' (empty), 'Website ?' (e.g. https://www.odoo.com), 'Tax ID ?' (e.g. BE0477472701), and 'Tags ?' (e.g. "B2B", "VIP", "Consulting", ...). At the bottom of the form, there are tabs for 'Contacts & Addresses' (selected), 'Sales & Purchase', 'Invoicing', and 'Internal Notes'. A large 'Add' button is located at the bottom left.

## 9. Create a quotation

It's early afternoon of January 16 and we are ready to create a new quotation for a Destop PCs.

Go to Sales app and select Orders>Quotations. Click New.



Set the Customer and add a product line with 1 Desktop PCs. Odoo automatically sets the Quotation Date to the current date, and the Expiration 1 month later.

The screenshot shows the 'New' quotation creation screen. At the top left, it says 'New'. On the left, there is a 'Customer' field set to 'BlueSky Associates'. On the right, there are fields for 'Expiration' (02/15/2024), 'Quotation Date' (01/16/2024 14:34:52), and 'Payment Terms'. Below these, there are tabs for 'Order Lines', 'Optional Products', 'Other Info', and 'Customer Signature'. The 'Order Lines' tab is active, showing a table with one row. The table has columns for 'Product', 'Description', 'Quantity', 'Unit Price', 'Taxes', and 'Tax excl.'. The row contains a product named 'Desktop PC' with a quantity of 1.00, a unit price of 690.00, and a tax of 15%, resulting in a total of \$ 690.00. At the bottom of the table, there are buttons for 'Add a product', 'Add a section', 'Add a note', and 'Catalog'.

Optionally, send the quotation by email to the customer by clicking on Send by Email.



## 10. Sell products

The following day, January 17, BlueSky Associates confirms the quotation.

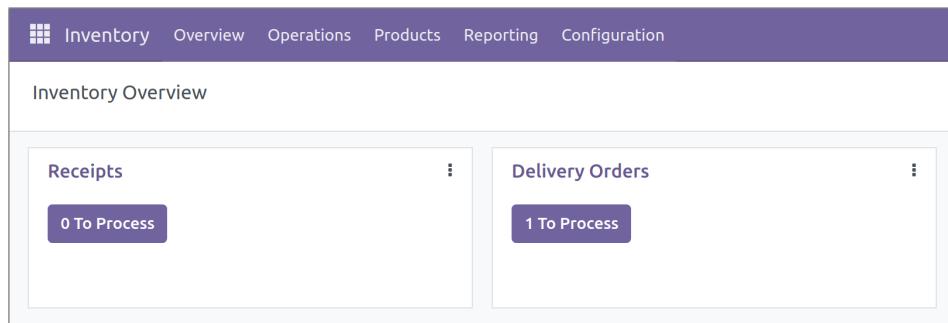
Confirm the quotation by clicking on Confirm. The Quotation Date is replaced by the Order Date, which is the date of the confirmation. We now have the sale order S00001.

S00001						
Customer ?		BlueSky Associates	Order Date ?		01/17/2024 10:37:20	
Payment Terms ?						
Order Lines	Other Info	Customer Signature				
Product	Description	Quantity	Invoiced	Unit Price	Taxes	Tax excl. ▾
Desktop PC	Desktop PC	1.00 C ▲	0.00	690.00	15%	\$ 690.00 □
Add a product	Add a section	Add a note	Catalog			
Terms and conditions...			Untaxed Amount:	\$ 690.00		
			Tax 15%:	\$ 103.50		
			Total:	\$ 793.50		

## 11. Deliver to customer

On January 19, we are ready to deliver the Desktop PC to BlueSky Associates. This is expected, as this product has a Customer Lead Time of 2 days.

Go to Inventory and click on the button in the Delivery Orders card.



There is of course only one delivery order listed, WH/OUT/00001, click on it.

Reference	Contact	Scheduled Date	Source Document	Status
WH/OUT/00001	BlueSky Associates	Today	S00001	Ready

The product to deliver is available because we already have 2 of them in our warehouse, so the delivery order is ready to be validated.

★ WH/OUT/00001

Delivery Address ?	BlueSky Associates	Scheduled Date ?	01/19/2024 10:37:20
		Deadline ?	01/19/2024 10:37:20
		Product Availability ?	Available
		Source Document ?	S00001

Operations    Additional Info    Note

Product	Demand	Quantity
Desktop PC	1.00	1.00

Click on Validate: the delivery order will change state, going from Ready to Done.



Notice that now the Deadline date is replaced by the Effective Date, which is the date of the validation.

 WH/OUT/00001	Scheduled Date <a href="#">?</a> 01/19/2024 10:37:20	
Delivery Address <a href="#">?</a> BlueSky Associates	Effective Date <a href="#">?</a> 01/19/2024 09:25:23	
	Source Document <a href="#">?</a> S00001	
<a href="#">Operations</a> <a href="#">Additional Info</a> <a href="#">Note</a>		
Product	Demand	Quantity 
Desktop PC	1.00	1.00

## 12. Invoice customer

On January 22 we create the customer invoice for the sales order S00001.

Go to Sales, click on To Invoice>Orders to Invoice, open the sales order S00001 and click on Create Invoice.

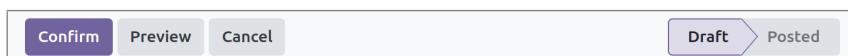


Odoo creates the new invoice INV/2024/00001.

The screenshot shows the 'Customer Invoice' creation screen. The invoice number is 'INV/2024/00001'. The customer is 'BlueSky Associates'. The invoice date is '01/22/2024'. The payment reference is 'INV/2024/00001'. The due date is '01/22/2024' and the delivery date is '01/19/2024'. There is a table with one row showing a 'Desktop PC' at a price of '\$ 690.00' and a tax of '15%'. The total amount is '\$ 793.50'. The bottom right shows the breakdown: 'Untaxed Amount: \$ 690.00', 'Tax 15%: \$ 103.50', and 'Total: \$ 793.50'.

Product	Label	Quantity	Price	Taxes	Tax excl.
Desktop PC	Desktop PC	1.00	\$ 690.00	15%	\$ 690.00

Click on Confirm: the invoice will change state, going from Draft to Posted.



After confirmation, the Invoice Date is set to the current date.

The screenshot shows the 'Customer Invoice' screen again. The invoice number is 'INV/2024/00001'. The customer is 'BlueSky Associates'. The invoice date is now '01/22/2024'. The payment reference is 'INV/2024/00001'. The due date is '01/22/2024' and the delivery date is '01/19/2024'.

## 13. Record the payment

It's the last day of January, we have already received the payment from BlueSky Associates and so we go ahead and record the payment.

Go to Invoicing and open the customer invoice INV/2024/00001.

Customer Invoice  
**INV/2024/00001**

Customer	BlueSky Associates	Invoice Date	01/22/2024
		Payment Reference	INV/2024/00001
		Due Date	01/22/2024
		Delivery Date	01/19/2024

**Invoice Lines**   **Other Info**

Product	Label	Quantity	Price	Taxes	Tax excl.
Desktop PC	Desktop PC	1.00	690.00	15%	\$ 690.00

Terms and Conditions

Untaxed Amount:	\$ 690.00
Tax 15%:	\$ 103.50
Total:	<b>\$ 793.50</b>

Amount Due: **\$ 793.50**

Click Register Payment.

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

Click Create Payment.

**Register Payment**

Journal	Bank	Amount	\$ 793.50
Payment Method	Manual	Payment Date	01/31/2024
Recipient Bank Account		Memo	INV/2024/00001

**Create Payment** **Discard**

The invoice is now paid.

**Customer Invoice**

**INV/2024/00001**

Customer	BlueSky Associates	Invoice Date	01/22/2024
		Payment Reference	INV/2024/00001
		Due Date	01/22/2024
		Delivery Date	01/19/2024

**PAID**

Invoice Lines		Other Info			
Product	Label	Quantity	Price	Taxes	Tax excl.
Desktop PC	Desktop PC	1.00	690.00	15%	\$ 690.00

Terms and Conditions	Untaxed Amount:	\$ 690.00
	Tax 15%:	\$ 103.50
	Total:	<b>\$ 793.50</b>

*Paid on 01/31/2024 \$ 793.50*

Amount Due: \$ 0.00