

# Odoo General and Demo

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August 12th, 2018

AHT

I. Introduction

II. General Settings

III - CRM

IV - Sales

V. Odoo Studio

VI. Planning

VII - Timesheets

VIII. Approvals

IX. Appointments

X. Accounting

XI. HR

# **I. Introduction**

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# 1 - What is Odoo

*Odoo is a comprehensive open-source enterprise resource planning (ERP) software made up of an integrated suite of business modules*

## 2 - Odoo Modules

- CRM
- Sales
- e-Commerce
- Accounting
- Inventory
- Manufacturing
- Employees

### 3 - Odoo ERP Implementation methodology:

1. Install basic Odoo.
2. Set up the load balancing if you need
3. Set up the database.
4. Install Odoo applications.
5. Install customized apps if any.
6. Configure the basic master like company info, user details, etc..
7. Configure user wise access levels.
8. And use.

## **II. General Settings**

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[Settings/User](<https://www.odoo.com/documentation/userIntroduction>)  
General Settings CRM Sales Odoo Studio Planning Timesheets  
Approvals Appointments Accounting

## 2 - Companies

- Edit current company
- Manage company

Company Name



General Information

Contact

Address

Street...

Street 2...

CityStateZIP

Country

Phone

Email

Website


VAT

Company Registry

Currency

Company Favicon

VND



**Figure 1:** Settings/Company/New

## 3 - Groups

- Groups defines rules to models within an application

Settings

General Settings +

2

2

YourCompany ✕

Mitchell Admin (aht-training) ▾

Groups

Internal Groups x search...

CREATE IMPORT

Filters Group By Favorites

1-38 / 38 < >

☐ Invoicing / Billing

☐ Invoicing / Billing Administrator

☐ Extra Rights / Contact Creation

☐ Technical Settings / Discount on lines

☐ Website / Editor and Designer

☐ User types / Internal User

Technical Settings / Discount on lines

Application

User types

Name

Internal User

Share Group ☐

Users

Inherited

Menus

Views

Access Rights

Record Rules

Notes

Name

Login

Language

Latest authentication

Company

Mitchell Admin

maiptn8399@gmail.com

09/23/2020 17:48:01

YourCompany

## 4 - Business documents:

- config layout: tagline, footer, logo, ...
- edit layout
- use custom layout

### ✦ Configure your document layout



#### Layout

☒ Standard

☐ Background

☐ Boxed

☐ Clean

#### Company Logo

Your logo

#### Colors



#### Font

Lato

#### Company Tagline

dknfklwleiw

#### Footer

nothing  
nothing  
nothing

#### Paper format

A4

Your logo

Invoice INV/2019/0005

Invoice Date:  
02/05/2019

Payment Terms:  
End of the month

Source:  
SO022

Description	Quantity	Unit Price	Amount
[SKU001] Server	2.000	190.00	\$ 380.00
[SKU002] Computer	1.000	1250.00	\$ 1250.00
Subtotal			\$ 1630.00
Total			\$ 1630.00

+1 (650) 691-3277 info@example.com example.com

SAVE

CANCEL

# 5 - Statistics

## Digest email: subscribe/unsubscribe, edit, create

Settings / Digest Emails / Weekly Stats in Odoo

EDIT CREATE Action 1 / 1 < >

UNSUBSCRIBE ME DEACTIVATE FOR EVERYONE SEND NOW ACTIVATED DEACTIVATED

### Weekly Stats in Odoo

Periodicity: Weekly  
Email Template: Digest: Default main template  
Next Send Date: 09/30/2020

KPIs Recipients How to customize your digest?

General		CRM	
Connected Users	<input checked="" type="checkbox"/>	New Leads/Opportunities	<input checked="" type="checkbox"/>
Messages	<input checked="" type="checkbox"/>	Opportunities Won	<input checked="" type="checkbox"/>
Invoicing		Sales	
Revenue	<input checked="" type="checkbox"/>	All Sales	<input checked="" type="checkbox"/>

## 6 - Others

### Contacts

#### Send SMS

Send texts to your contacts

→ [Buy credits](#)



#### Partner Autocomplete

Automatically enrich your contact base with company data

→ [Buy credits](#)

### Discuss

#### Activities

Configure your activity types

→ [Activity Types](#)



#### External Email Servers

Use your own email servers

### Users



#### Default Access Rights

Set custom access rights for new users



#### Password Reset

Enable password reset from Login page



#### Show Effect

Add fun feedback and motivate your employees

#### Customer Account

Let your customers log in to see their documents

☒ On invitation

☐ Free sign up



#### Import & Export

Allow users to import data from CSV/XLS/XLSX/ODS files

### In-App Purchases

#### Odoo IAP

View your IAP Services and recharge your credits

→ [View My Services](#)

## 7 - Others

### Products

#### Weight Measurement

Choose the unit to measure weight

☒ Kilogram

☐ Pound

#### Volume unit of measure

In which unit of measure do you manage your volumes

☒ Cubic Meters

☐ Cubic Feet

### Multi-Company

☐ Inter-Company Transactions 

Automatically generate counterpart documents for orders/invoices between companies

### Odoo Cloud Notification (OCN)

☐ Push Notifications

Get notifications on Android and iOS application

## **III - CRM**

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# 1 - CRM settings

- Leads designates an individual who might become your customer, but currently isn't. Leads are usually converted to contacts, companies and deals (opportunities) or are 'junked'.

**CRM**

☐ **Leads**  
Add a qualification step before the creation of an opportunity

**Predictive Lead Scoring**  
Let statistical analysis determine the probability to close a lead

Fields used in probability computation:

State ✕ Country ✕ Phone Quality ✕ Email Quality ✕

Source ✕

Consider leads created as of the 09/02/2020

**Lead Generation**

☐ **Visits to Leads**  
Convert visitors of your website into leads and perform data enrichment based on their IP address

☐ **Lead Enrichment**  
Enrich your leads automatically with company data based on their email address

☐ **Lead Mining**  
Generate new leads based on their country, industry, size, etc.

## 2 - CRM workflow

- Acquire leads: by emails, website -> list of leads
- Convert leads into opportunity (manually | lead mining)
  - New
  - Qualified
  - Proposition
  - Won

### 3 - CRM Scenarios:

- Planning activity
- Generate leads/opportunities from emails/webpage
- Demo an opportunity lifecycle (+ send quotation, manage lost)

- CRM Settings
- Sale team: leader, members, email...
- activity types
- pipeline: stages, tags, lost reasons (add, rm, edit),
- leads: change lead to opportunity, lead gen, lead mining, lead enrich, ... ( money)

## **IV - Sales**

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# 1 - Sales workflow

- Create a quotation
- Send it to your customer
- Wait for confirmation
- Confirm the sales order
- Create an invoice.

## 2 - Sales Scenarios

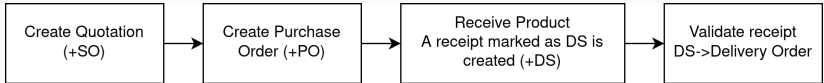
- Create and send quotations
  - use quotation template: product, optional products, signature, paid, deadline, deliver and invoicing address, term & condition
  - deliver lead time, price

### 3 - Dropshipping

- Enable dropshipping (purchase settings, product)
- PO is automatically generated when creating quotations
- When PO is confirmed and received, SO with update the delivery info



### 3 - Dropshipping



## **V. Odoo Studio**

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*An Odoo Module can contain a number of elements, such as: business objects (models), object views, data files, web controllers, and static web data. An application is a collection of modules.*

*Model usually represents a concept from the real world. Example: Odoo has models for Sales Orders, Users, Countries, etc.*

### 3 - Field

- scalar: number/text
- relational field: provide the option to link the data of one model with the data of another model.

New Fields	
<input type="text" value="Ab"/> Text char	<input type="text" value="Multiline Text"/> Multiline Text text
<input type="text" value="N°"/> Integer integer	<input type="text" value="1.5"/> Decimal float
<input type="text" value="Html"/> Html html	<input type="text" value="€"/> Monetary monetary
<input type="text" value="Date"/> Date date	<input type="text" value="Date &amp; Time"/> Date & Time datetime
<input checked="" type="checkbox"/> Checkbox boolean	<input type="text" value="Selection"/> Selection selection
<input type="text" value="File"/> File binary	<input type="text" value="One2many"/> One2many one2many
<input type="text" value="Many2one"/> Many2one many2one	<input type="text" value="Many2many"/> Many2many many2many
<input type="text" value="Image"/> Image binary	<input type="text" value="Tags"/> Tags many2many
<input type="text" value="Priority"/> Priority selection	<input type="text" value="Signature"/> Signature binary
<input type="text" value="Related Field"/> Related Field related	

## 4 - View and Menu

- View: define how records are displayed
  - type view: form, list, kanban
- A Menu

## **VI. Planning**

---

# 1 - Time Shift Planning

## View time shifts

Planning Schedule

Employee x Search

ADD + TODAY + DAY WEEK MONTH YEAR COPY PREVIOUS WEEK SEND SCHEDULE

Filters Group By Favorites

Shift View	27 September 2020 - 03 October 2020						
	Sunday, 27th	Monday, 28th	Tuesday, 29th	Wednesday, 30th	Thursday, 1st	Friday, 2nd	Saturday, 3rd
Open Shifts			8:00 AM - 2:00 PM Chef			8:00 AM - 4:00 PM Bartender	
Anita Oliver		8:00 AM - 4:00 PM Water		8:00 AM - 4:00 PM Water	8:00 AM - 4:00 PM Water	8:00 AM - 4:00 PM Water	
Randall Lewis		8:00 AM - 2:00 PM Chef		8:00 AM - 2:00 PM Chef	8:00 AM - 2:00 PM Chef	8:00 AM - 2:00 PM Chef	
Marc Demo		8:00 AM - 4:00 PM Bartender	8:00 AM - 4:00 PM Bartender	8:00 AM - 4:00 PM Bartender	8:00 AM - 4:00 PM Bartender		
Sharlene Rhodes		4:00 PM - 12:00 AM Bartender	4:00 PM - 12:00 AM Bartender	4:00 PM - 12:00 AM Bartender	4:00 PM - 12:00 AM Bartender	4:00 PM - 12:00 AM Bartender	
Jennie Fletcher		4:00 PM - 12:00 AM Water	4:00 PM - 12:00 AM Water				
Toni Jimenez		4:00 PM - 10:00 PM Chef	4:00 PM - 10:00 PM Chef	4:00 PM - 10:00 PM Chef	4:00 PM - 10:00 PM Chef	4:00 PM - 10:00 PM Chef	
Doris Cole			8:00 AM - 4:00 PM Water				
Mitchell Adnan				4:00 PM - 12:00 AM Water	4:00 PM - 12:00 AM Water	4:00 PM - 12:00 AM Water	



## 2 - Create Time Shift

- Recurrent shift
- Plan time for task
- Save shift as template
- Duplicate plan from previous week

Open

Planning Templates

☐ 8 AM - 2 PM Chef ☐ 8 AM - 4 PM Bartender ☐ 8 AM - 4 PM Waiter ☐ 2 PM - 10 PM Chef ☐ 4 PM - 12 AM Bartender ☐ 4 PM - 12 AM Waiter

Employee

Mitchell Admin

▼

🔗

Start date

09/28/2020 13:00:00

▼

Role

▼

End date

09/28/2020 22:00:00

▼

Project

▼

Allocated hours

09:00

Company

Demo Company

▼

🔗

Allocated Time (%)

100.00

Repeat

☐

Note

☐ Save as a Template

SAVE

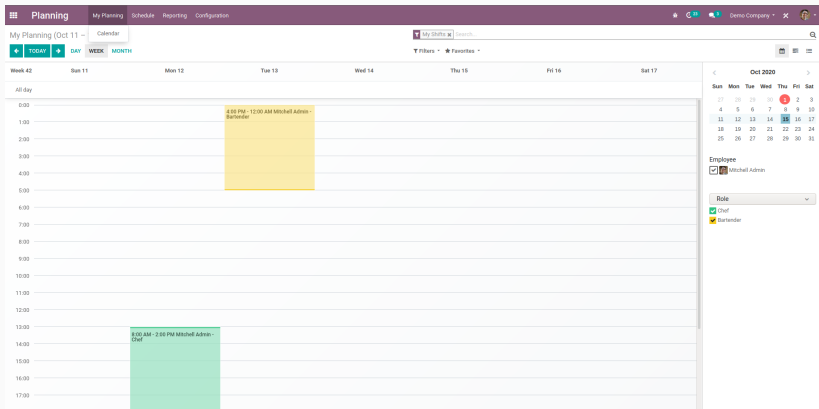
PUBLISH & SEND

PUBLISH

DISCARD

## 3 - Publish and Send Week Plan

- Automate by set up Scheduled Action



## **VII - Timesheets**


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# 1 - Timesheet Settings

## Time Encoding

### Encoding Unit

Set the time unit used to record your timesheets

Hours 

### Round timesheets

Minimal duration  minutes

Rounding up  minutes



### Awesome Timesheet

Synchronize time spent with our web/mobile apps



## Billing

### Time Billing

Sell services and invoice time spent

[→ Configure your services](#)

### Invoicing Policy

Record time spent and invoice it based on:


- ☒ All recorded timesheets  
☐ Approved timesheets only

## Timesheet Control



### Employee Reminder

Activate a periodical email reminder for timesheet users

Frequency  days  



### Manager Reminder

Activate a periodical email reminder for timesheet managers



Frequency  days  

## Time Off



### Record Time Off

Create timesheets upon time off validation

Project   

Task  

## 2 - Timesheet on a task

- Create timesheet
- Employee reminder

Add a Line

Project

Date

10/01/2020

Task

Time Spent

00:00

Hours

Employee

Mitchell Admin

SAVE

DISCARD

### 3 - Task Analysis (Project Module)

#### Tasks Analysis

MEASURES ▾



# Days to Deadline

# of Tasks

# Working Days to Assign

# Working Days to Close

✓ Effective Hours

✓ Planned Hours

Progress

Remaining Hours

✓ Count

AGR - S00039 (2)

+ DPC - S00040 (2)

+ Total

Count	Effective Hours	Planned Hours
-------	-----------------	---------------

45	116.16	1,007.00
----	--------	----------

10	37.33	285.00
----	-------	--------

10	0.00	261.00
----	------	--------

4	22.00	340.00
---	-------	--------

1	0.00	50.00
---	------	-------

1	0.00	10.00
---	------	-------

5	20.08	50.00
---	-------	-------

1	32.00	10.00
---	-------	-------

## 4 - Planning Analysis (Project Module)

Planning Analysis							Search...	
MEASURES ▾							Filters ▾    Group By ▾    Time Ranges ▾    ★ Favorites	
	- Total							
	+ W51 2019		+ W52 2019		+ W53 2019			
	Allocated Time (%)	Effective hours	Allocated Time (%)	Effective hours	Allocated Time (%)	Effective hours	Allocated Time (%)	Effective hours
- Total	300.00	0.00	3,000.00	0.00	2,700.00	0.00	6,000.00	0.00
+ Mitchell Admin			300.00	0.00	200.00	0.00	500.00	0.00
+ Anita Oliver	100.00	0.00	400.00	0.00	200.00	0.00	700.00	0.00
+ Sharlene Rhodes			500.00	0.00	300.00	0.00	800.00	0.00
+ Randall Lewis	100.00	0.00	400.00	0.00	400.00	0.00	900.00	0.00
+ Jennie Fletcher			200.00	0.00	500.00	0.00	700.00	0.00
+ Marc Demo	100.00	0.00	400.00	0.00	400.00	0.00	900.00	0.00
+ Toni Jimenez			500.00	0.00	300.00	0.00	800.00	0.00
+ Doris Cole			100.00	0.00	100.00	0.00	200.00	0.00
+ Total								
+ Undefined			200.00	0.00	300.00	0.00	500.00	0.00

## 5 - HR Analysis (Timesheets)

HR Timesheet/Attendance Report

Search...

MEASURES ▾

⇄ + ⬇

▼ Filters ▾

≡ Group By ▾

📅 Time Ranges ▾

	- Total						
	+ 12 Aug 2019			+ 13 Aug 2019			+ 14 Aug
	Total Difference	Total Timesheet	Total Attendance	Total Difference	Total Timesheet	Total Attendance	Total Diffe
- Total	-08:00	08:00	00:00	-08:00	08:00	00:00	-
+ Mitchell Admin	-08:00	08:00	00:00	-08:00	08:00	00:00	
+ Marc Demo							



## **VIII. Approvals**

---

# 1 - Approval Types

Name

Business Trip

Description

Options

Fields

Document

☐ Required

☒ Optional

Contact

☐ Required

☐ Optional

☒ None

Date

☐ Required

☐ Optional

☒ None

Period

☒ Required

☐ Optional

☐ None

Items

☐ Required

☐ Optional

☒ None

Quantity

☐ Required

☐ Optional

☒ None

Amount

☐ Required

☐ Optional

☒ None

Reference

☐ Required

☐ Optional

☒ None

Payment

☐ Required

☐ Optional

☒ None

Location

☒ Required

☐ Optional

☐ None

Approvers

Employee's Manager

☒

Approvers

Mitchell Admin x

Minimum Approval

1



## 2 - Create New Request

Dashboard / New

SAVE

DISCARD

SUBMIT

ATTACH DOCUMENT

TO SUBMIT

SUBMITTED

APPROVED

REFUSED

CANCEL

Approval Subject

Business Trip

Request Owner

Mitchell Admin

Category

Business Trip

Date Confirmed

Period

From:

to:

Location

Description

Approver(s)

## 3 - Manage Requests

Approvals to Review / Business Trip

EDIT

Action ▾

1 / 1 < >

APPROVE

REFUSE

CANCEL

ATTACH DOCUMENT

TO SUBMIT

SUBMITTED

APPROVED

REFUSED

CANCEL

### Business Trip

Request Owner Mitchell Admin  
Category Business Trip  
Date Confirmed 10/01/2020 11:44:49  
Period From: 10/13/2020 11:44:31  
to: 10/22/2020 11:44:31  
Location abc

Description

Approver(s)

## **IX. Appointments**

---

# 1 - Create Online Appointments

- Define scheduling rules

Online Appointments / Schedule a Demo

SAVE

DISCARD

1 / 1 < >

Appointment Type

## Schedule a Demo

Scheduling & Availability

Slots

Questions

Messages

**Appointment Duration** 01:00 \_\_\_\_\_ hours  
**Schedule Appointment** at least 01:00 \_\_\_\_\_ hours  
before  
and not after 15 \_\_\_\_\_  
days  
**Allow Cancelling** until 01:00 \_\_\_\_\_ hours  
before

**Timezone** Europe/Brussels ▾  
**Reminders** Notification - 15 Minutes ✕ ▾  
**Location** 215 Vine St. Scranton Pennsylvania 18503  
**Assignment Method** Random ▾  
**Restrict Countries** ▾

### Available Employees

Employee Name	Working Hours
---------------	---------------

Mitchell Admin	Standard 40 hours/week
----------------	------------------------

Marc Demo	Standard 40 hours/week
-----------	------------------------

[Add a line](#)

<https://demo5.odoo.com/website/calendar/schedule>

<https://demo5.odoo.com/website/calendar/schedule>

## 2 - Register An Appointment

YOUR WEBSITE

Home Shop Events Forum Blog Jobs Courses Live Support Appointment Contact us Mitchell Admin

### Appointment Time

Appointment Time Confirmation

Registered

October 2020

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	09:00 11:00 13:00 15:00	23	24	25	
26	27		30	31	1	

Time displayed in Europe/Brussels timezone

Our Products & Services






Home

Connect with us

Contact us

+1 (850) 691-3277

info@yourcompany.example.com



Demo Company - About us

We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.

Our products are designed for small to medium size companies willing to optimize their performance.

YOUR WEBSITE

Home Shop Events Forum Blog Jobs Courses Live Support Appointment Contact us Mitchell Admin

### Appointment: Schedule a Demo with Mitchell Admin

Your appointment has been successfully booked!

We thank you for your interest in our products! Please make sure to arrive **15 minutes** before your appointment.

Where: Mon Oct 12, 2020, 1:00:00 PM  
(timezone: Europe/Brussels)

Duration: 1 hour

Location: 215 Vine St. Scranton Pennsylvania 18503

Attendee: Mitchell Admin

Description: Country: United States  
Mobile: 32345425  
Email: admin@yourcompany.example.com

Add to Outlook

Add to Google Calendar

Cancel / Reschedule

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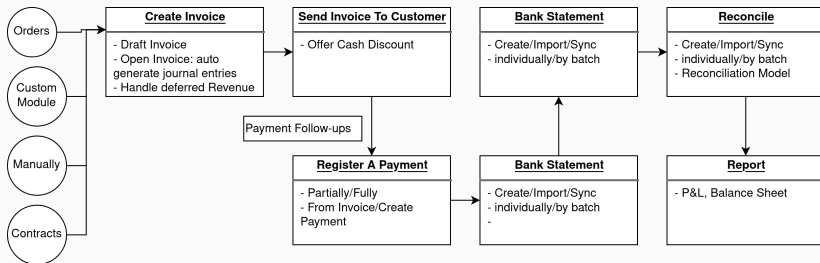
38

## **X. Accounting**

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# 1 - Overview








# 1 - Overview

- Create Journal Entry
- Create Journal Item
- Follow-up payments, follow up level

## YourCompany

To remind customers of paying their invoices, you can define different actions depending on how severely overdue the customer is. These actions are bundled into follow-up levels that are triggered when the due date of an invoice has passed a certain number of days. If there are other overdue invoices for the same customer, the actions of the most overdue invoice will be executed.

Follow-Up Action	Due Days	Send an Email	Send a Letter	Manual Action	
First reminder email	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Second reminder letter and email	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Third reminder: phone the customer	40	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Urging reminder email	50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Urging reminder letter	60	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[Add a line](#)

- Support internal transfer

# 1 - Customer Invoice to Payments

- Create invoice

Panoramica della contabilità / New

SAVE DISCARD

POST PREVIEW

DRAFT POSTED

## Draft Invoice

Customer	Coin gourmand	Invoice Date	09/27/2020
Delivery Address	Coin gourmand	Payment Terms	15 Days
Reference		Journal	Customer Invoices (USD)
		Company	Demo Company

Invoice Lines Journal Items Other Info

Product	Label	Account	Quantity	Price	Taxes	Subtotal
+ [DESK0005] Customizable Des...	[DESK0005] Customizable Desk (CONFIG) (Custom, White) 160x80cm, with large legs.	400000 Product Sales	1.000	750.00	Tax 15.00%	750.00

Add a line Add a section Add a note

Untaxed Amount:	\$ 750.00
Tax 15%:	\$ 112.50
<b>Total:</b>	<b>\$ 862.50</b>

Add an internal note...

# 1 - Customer Invoice to Payments

- Create invoice (Offer cash discount)

Draft Invoice

Customer

Azure Interior, Callen Diaz

Invoice Date

10/02/2020

Delivery Address

Azure Interior, Callen Diaz

Payment Terms

10% discount in first week

Reference

Journal

Customer Invoices (9350)

Company

Demo Company

Invoice Lines

Journal Items

Other Info

Account	Label	Debit	Credit	Tax Code	
201000 Tax Received	Tax 10.00%	0.00	112.54		11
121000 Account Receivable		\$ 779.77	\$ 0.00		10
121000 Account Receivable		\$ 66.31	\$ 0.00		10
400000 Product Sales	[CONFLR9957] Book	0.00	0.00		10
400000 Product Sales	[DESK0000] Customizable Desk [CONFIG] (Custom, White) 160x80cm, with large legs	0.00	750.00		10
Add a line					
		\$63.68	\$63.68		

Open Payment Terms

Payment Terms

10% discount in first week

Company

Demo Company

Description on the Invoice

None

Terms

The last line's computation type should be "Balance" to ensure that the whole amount will be allocated.

Due Type	Value	Number of Days	Options	Day of the month
+ Percent	90.000000	7	days after the invoice date	0
+ Balance	0.000000	30	days after the invoice date	0
Add a line				

SAVE

DISCARD

# 1 - Customer Invoice to Payments

- Register a payment from a customer invoice (auto reconcile)
- Create a new payment (payment matching)

Panoramica della contabilità / INV/2020/0006

SAVE DISCARD

SEND & PRINT REGISTER PAYMENT PREVIEW ADD CREDIT NOTE RESET TO DRAFT

DRAFT POST

Customer Invoice

INV/2020/0006

Customer

Coin gourmand  
Rr. e Durrësit, Pall. M.C. Inerte  
Kati.1, Laprakë, Tirana, Shqipëri  
Tirana  
Albania

Invoice Date

09/27/2020

Payment Terms

15 Days

Journal

Customer Invoices (USD)

Company

Demo Company

Delivery Address

Coin gourmand

Reference

Invoice Lines

Journal Items

Other Info

Account	Label	Debit	Credit	Tax Grids	
400000 Product Sales	[DESK0005] Customizable Desk (CONFIG) (Custom, White) 160x80cm, with large legs.	\$ 0.00	\$ 750.00		
251000 Tax Received	Tax 15.00%	\$ 0.00	\$ 112.50		
121000 Account Receivable	INV/2020/0006	\$ 862.50	\$ 0.00		
		862.50	862.50		

# 1 - Customer Invoice to Payments

- Register a payment from a customer invoice (auto reconcile)
- Create a new payment (payment matching)

Accounting Dashboard / Invoices / INV/2020/10/0004

EDIT

CREATE

Print

Action

SEND & PRINT

REGISTER PAYMENT

PREVIEW

ADD CREDIT NOTE

RESET TO DRAFT

DRAFT

POSTED

Customer Invoice

INV/2020/10/0004

Customer

Deco Addict

77 Santa Barbara Rd  
Pleasant Hill CA 94523  
United States

Delivery Address

Deco Addict

Payment Reference

INV/2020/10/0004

Invoice Date

10/12/2020

Due Date

30 Days

Journal

Customer Invoices

Electronic invoicing

Sent

PARTIAL

Invoice Lines

Journal Items


Other Info

Product	Label	Account	Quantity	Price	Taxes	Subtotal
[DESK0004] Customizable Desk (CONFIG) (Alum...	[DESK0004] Customizable Desk (CONFIG) (Aluminium, Black) 160x80cm, with large legs.	400000 Product Sal...	1.00	800.40	Tax 15.00%	\$ 800.40

Untaxed Amount: \$ 800.40

Tax 15%: \$ 120.06

Total: \$ 920.46

 Paid on 10/12/2020 \$ 820.46

# 1 - Customer Invoice to Payments

- Auto-reconcile the invoice with corresponding payments

Payments / BNK1/2020/10/0001

**SAVE** DISCARD

RESET TO DRAFT MARK AS SENT

DRAFT **POSTED**

☰ 1 Invoice

## BNK1/2020/10/0001

Payment Type	Receive Money	Journal	Bank
Partner Type	Customer	Recipient Bank	BE68539007547034
Customer/Vendor	Deco Addict	Account	
Destination Account	121000 Account Receivable	Journal Entry	BNK1/2020/10/0001 (INV/2020/10/0004)
Is Internal Transfer	<input type="checkbox"/>		
Company	Demo Company		
Amount	\$ 820.46		
Date	10/12/2020		
Memo	INV/2020/10/0004		

**Figure 3:** Payment paid from invoice

# 1 - Customer Invoice to Payments

- Payment that is created manually have to do Payment Matching (upper right button)

Payments / BNK1/2020/10/0004

**SAVE** DISCARD

RESET TO DRAFT MARK AS SENT

DRAFT POSTED

\$ Payment Matching

## BNK1/2020/10/0004

Payment Type	Receive Money	Journal	Bank
Partner Type	Customer	Recipient Bank	
Customer/Vendor	<a href="#">Coin gourmand</a>	Account	
Destination Account	121000 Account Receivable	Journal Entry	<a href="#">BNK1/2020/10/0004</a>
Is Internal Transfer	<input type="checkbox"/>		
Company	Demo Company		
Amount	\$ 100.00		
Date	10/12/2020		
Memo			

**Figure 4:** Payment created manually



# 1 - Customer Invoice to Payments

Accounting Dashboard / BNK1 Statement 2020/01/00002

**SAVE** DISCARD

RECONCILE RESET TO NEW

NEW **PROCESSING** VALIDATED

Journal Entries

**Reference**

**BNK1 Statement 2020/01/00002**

Journal	Bank	Starting Balance	\$ 9,944.87
Date	10/12/2020	Ending Balance	\$ 10,865.33
Company	Demo Company		

Transactions

Date	Label	Partner	Amount
10/12/2020	INV/2020/0004		\$ 920.46

Computed Balance: **\$ 10,865.33**

**Figure 5: Bank statement**

# 1 - Customer Invoice to Payments

Select Partner

VALIDATE

101401	10/12/2020	INV/2020/0004	\$ 920.46	
Choose counterpart or Create Write-off			\$ 920.46	

Customer/Vendor Matching







Manual Operations

Filter on account, label, partner, amount,...

211000	10/31/2018	Azure Interior: BILL/2018/09/0001 : INV/2018/0057	\$ 541.10	
121000	09/21/2020	Deco Addict: INV/2020/09/0001		\$ 365,125.00
101402	10/12/2020	Deco Addict: BNK1/2020/10/0001: Customer Payment \$ 820.46 - Deco Addict - 10/12/2020 : INV/2020 /10/0004		\$ 820.46
101402	10/12/2020	Deco Addict: BNK1/2020/10/0002: Customer Payment \$ 100.00 - Deco Addict - 10/12/2020 : INV/2020 /10/0004		\$ 100.00
121000	11/07/2020	Deco Addict: INV/2020/10/0002		\$ 169,625.00
121000	11/07/2020	Deco Addict: INV/2020/10/0003		\$ 143,750.00
121000	11/30/2020	Azure Interior: INV/2020/10/0001		\$ 365,125.00

Figure 6: Reconciliation

# 1 - Customer Invoice to Payments

Deco Addict					<b>VALIDATE</b>	
101401	10/12/2020	IN	<a href="#">External link</a>	\$ 920.46		
101402	10/12/2020	BNK1/2020/10/0001: Customer Payment \$ 820.46 - Deco Addict - 10/12/2020 : INV/2020/10/0004			 \$ 820.46	
101402	10/12/2020	BNK1/2020/10/0002: Customer Payment \$ 100.00 - Deco Addict - 10/12/2020 : INV/2020/10/0004			 \$ 100.00	

**Figure 7: Reconciliation**

## 2 - Vendor Bills to Payments

- Create/Upload Bills (different rounding methods)
- Batch Payment
  - Inbound batch type (customer batch payment)
  - Outbound batch type (vendor batch payment)

## 2 - Vendor Bills to Payments

Entries are posted when confirm the bills

Bills / BILL/2020/10/0004

SAVE DISCARD

REGISTER PAYMENT ADD CREDIT NOTE RESET TO DRAFT DRAFT POSTED

Vendor Bill

BILL/2020/10/0004

Vendor

Bloom GmbH  
Bahnenstraße 55  
10117 Berlin  
Germany

Delivery Address

Bloom GmbH

Bill Reference

Payment Reference

Recipient Bank

Bill Date

10/12/2020

Accounting Date

10/12/2020

Due Date

10/12/2020

Journal

Vendor Bills

Invoice Lines Journal Items Other Info

Account	Label	Debit	Credit	Tax Grids	
110200 Stock Interim (Received)	DESK0004 Customizable Desk (CONF02) (Aluminium, Black)	\$ 900.00	\$ 0.00		
131000 Tax Paid	Tax 15.00%	\$ 75.00	\$ 0.00		
211000 Account Payable		\$ 0.00	\$ 975.00		
		575.00	575.00		

INVOICE

Invoice Number # INV-410360740

Invoice Date 8/11/1981

Billing Information

Company

Non ultricies, libero non mattis pulvinar, nulla pede ullamcorper augue, a suscipit nulla elit ac nulla.

Name

Chesney Riatt

Address

7 Delladonna Drive, 30745 Sloan Place  
Columbus, Georgia, 31904  
United States

Email

warrior@exampl.com

Shipping Information

Name

Chesney Riatt

Address

7 Delladonna Drive, 30745 Sloan Place  
Columbus, Georgia, 31904  
United States


Products

Description	Quantity	Unit Price
Carver - Seed		\$12.00
Olives - Cooking		\$43.00

Figure 8: Vendor Bill

## 3 - Auto Reconciliation

- Reconciliation Model

 0 Journal Entries

**Name**  
**Invoices Matching Rule**

**Type**

- ☐ Manually create a write-off on clicked button.
- ☐ Suggest counterpart values.
- ☒ Match existing invoices/bills.

**Auto-validate** ☐

**Conditions on Bank Statement Line**

**Journals**

**Amount Nature**

- ☐ Amount Received
- ☐ Amount Paid
- ☒ Amount Paid/Received

**Amount**

**Label**

**Note**

**Transaction Type**

**Same Currency Matching** ☒

**Amount Matching** ☒ 100.00 %  
This parameter will be bypassed in case of a statement line communication matching exactly existing entries

**Partner Is Set & Matches** ☒

**Restrict Partners to**

**Restrict Partner Categories to**

## 4 - Handle Deferred Revenues

*Odoo Accounting handles deferred revenues by spreading them in multiple entries that are automatically created in draft mode and then posted periodically.*

- Deferred revenue model: create Deferred Revenue entries faster.

Deferred Revenue Models / New

SAVE

DISCARD

Deferred Revenue Model name

10 years warranty

Depreciation Method

Number of  
Recognitions 10 Years

Prorata Temporis ☒

Accounting

Company Demo Company

Revenue Account 450000 Other Income

Deferred Revenue Account Deferred Revenue Account

Journal

## 4 - Handle Deferred Revenues

- Deferred revenue

### 10 year warranty

#### Asset Values

Original Value \$ 300.00  
Acquisition Date 10/02/2020

#### Depreciation Method

Number of Recognitions 10 Years  
Prorata Temporis ☒ Prorata Date 10/02/2020  
First Recognition Date 12/31/2020

#### Current Values

Residual Amount to Recognize \$ 300.00  
Deferred Revenue Amount \$ 300.00

#### Accounting

Company Demo Company  
Revenue Account 450000 Other Income  
Deferred Revenue Account 222000 Deferred Revenue Account  
Journal Miscellaneous Operations (USD)

Revenue Board

Related Sales

Reference	Revenue Date ▼	Revenue	Cumulative Revenue	Next Period Revenue	Journal Entry
10 year warranty (prorata entry)	12/31/2020	\$ 7.46	\$ 7.46	\$ 292.54 /	
10 year warranty (1/10)	12/31/2021	\$ 30.00	\$ 37.46	\$ 262.54 /	
10 year warranty (2/10)	12/31/2022	\$ 30.00	\$ 67.46	\$ 232.54 /	
10 year warranty (3/10)	12/31/2023	\$ 30.00	\$ 97.46	\$ 202.54 /	
10 year warranty (4/10)	12/31/2024	\$ 30.00	\$ 127.46	\$ 172.54 /	
10 year warranty (5/10)	12/31/2025	\$ 30.00	\$ 157.46	\$ 142.54 /	
10 year warranty (6/10)	12/31/2026	\$ 30.00	\$ 187.46	\$ 112.54 /	
10 year warranty (7/10)	12/31/2027	\$ 30.00	\$ 217.46	\$ 82.54 /	
10 year warranty (8/10)	12/31/2028	\$ 30.00	\$ 247.46	\$ 52.54 /	
10 year warranty (9/10)	12/31/2029	\$ 30.00	\$ 277.46	\$ 22.54 /	
10 year warranty (10/10)	12/31/2030	\$ 22.54	\$ 300.00	\$ 0.00 /	



## 5 - Credit Notes and Refund

- invoice mistake
- goods return
- service rejection
- damaged delivered goods



### Create a Credit Note

- Partial/Full/Full+Draft Invoice
- Create New
- Add to Invoice (refund customer)
- Add to Vendor Bill (vendor refund)  
(automatically validate & reconcile with original invoice/bill)

## 5 - Credit Notes and Refund

Customer Credit Note

RINV/2020/0001

Customer

Deco Addict  
77 Santa Barbara Rd  
Pleasant Hill CA 94523  
United States

Invoice Date

10/05/2020

Payment Terms

10/05/2020

Journal

Customer Invoices (USD)

Company

Demo Company

Delivery Address

Reference

Reversal of: INV/2020/0004, broken

PAID

Invoice Lines

Journal Items

Other Info

Product	Label	Account	Quantity	Price	Taxes	Subtotal	
[FURN_6741] Large Meeting Table	[FURN_6741] Large Meeting Table Conference room table	400000 Product Sales	5.000	642.00		3,210.00	
[FURN_8220] Four Person Desk	[FURN_8220] Four Person Desk Four person modern office workstation	400000 Product Sales	5.000	280.00		1,400.00	

Untaxed Amount:

\$ 4,610.00

Total:

\$ 4,610.00

Paid on 10/05/2020

\$ 4,610.00

Amount Due:

\$ 0.00

Figure 9: Credit Note

## 6 - Invoice Online Payment

### Paypal

PayPal is the easiest way to accept payments via Paypal or credit cards.

- ✓ Online Payment
- ✓ Payment Status Tracking

Disabled



ACTIVATE

### Wire Transfer

Provide instructions to customers so that they can pay their orders manually.



Enabled

### Ingenico

Ingenico Payment Services (formerly Ogone) supports a wide range of payment methods: credit cards, debit cards, bank transfers, Bancontact, iDeal, Giropay.

- ✓ Online Payment
- ✓ Payment Status Tracking
- ✓ Subscriptions
- ✓ Save Cards
- ✓ Embedded Credit Card Form



INSTALL

### Authorize.net

A payment gateway to accept online payments via credit cards and e-checks.

- ✓ Online Payment
- ✓ Payment Status Tracking
- ✓ Subscriptions
- ✓ Save Cards
- ✓ Manual Capture
- ✓ Embedded Credit Card Form



INSTALL

### Pay with



☒ Paypal



☐ Wire Transfer

Pay Now

Your logo

/ Invoices & Bills / INV/2020

**1,694.00 €**  
Due today

Pay Now

Download Print

Salesperson

## 7 - Register Customer Payments by Checks

The first journal entry is created by registering the payment on the invoice. The second one is created when registering the bank statement.

Account	Debit	Credit	Reconciliation
Account Receivable		100	Invoice ABC
Undeposited funds	100		Check 0123

Account	Debit	Credit	Reconciliation
Undeposited funds		100	Check 0123
Bank	100		

A journal  
recon  
entry.

Acco

Acco  
Rece

Bank

## 7.1 - Undeposited Funds

Accounting

DashboardSalesPurchasesAdviserReportingConfiguration

Register Payment

Payment Method

Checks (EUR)

Payment Date

07/08/2015

Payment Amount

254826.00 €

Memo

Ref. 2100-2919-02101

VALIDATE

 or 

Cancel

Customer

Epic Technologies

Invoice Date

07/08/2015

Reconciled Entries

CHK/2020/0001

Reference

Check 2100-2919-02101

Accounting Date

10/05/2020

Journal

Checks (USD)

Company

Demo Company

Journal Items

Other Info

Account	Partner	Label	Debit	Credit	Tax Grids
121000 Account Receivable	Gemini Furniture	Customer Payment: INV/2020/0007	\$ 0.00	\$ 862.50	
144100 Undeposited Checks	Gemini Furniture	CUST.IN/2020/0002	\$ 862.50	\$ 0.00	
			862.50	862.50	

## 8 - Multicurrencies

- Live currency rate
- auto record exchange gain and loss

### Currencies

☒ **Main Currency**  
Main currency of your company

Currency USD

☒ **Automatic Currency Rates**  
Update exchange rates automatically

Service European Central Bank

Interval Daily

Next Run 10/06/2020

☒ **Multi-Currencies**  
Record transactions in foreign currencies

[➔ Activate Other Currencies](#)

Exchange Exchange Difference (USD)

Gain or Loss

Journal

Journal Entries / BNK1/2020/0004 (INV/2020/0006)

Posted

Journal Entry

Search...

/ Journal Items

Filters

Group By

1-3 / 3

<input type="checkbox"/> Date	Company	Journal ...	Account	Partner	Label	Matching	Debit	Credit	Amount in...
10/07/2020	EXCH/2020/0002						137.25	0.00	0.00
10/07/2020	BNK1/2020/0004	(INV/2020/0006) - Coin gourmand					0.00	887.25	-892.48
10/06/2020	INV/2020/0006 - Coin gourmand						750.00	0.00	892.48
							887.25	887.25	

## 9 - Bank and Cash

---

- Cash register
- Synchronize PayPal
- Synchronize bank account

## 10 - Reconciliation Model

- Write-off button
- Suggestion of counterpart values
- Match existing invoice/bills





# 11.1 - Taxes

- add/edit/active/deactive tax
- verify VAT number
- withholding tax (Retention tax group, negative value)

Tax Name	Tax 15.00%	Tax Scope	Purchases
Tax Computation	Percentage of Price Tax Included	Amount	15.0000 %
Active	<input checked="" type="checkbox"/>		

Definition

Advanced Options

### Repartition for Invoices

	%	Based On	Account	Tax Grids
+		Base		
+	100.00	of tax	131000 Tax Paid	
Add a line				

### Repartition for Credit Notes

	%	Based On	Account	Tax Grids
+		Base		
+	100.00	of tax	131000 Tax Paid	
Add a line				

## 11.1 - Taxes

- add/edit/active/deactive tax
- verify VAT number
- withholding tax (Retention tax group, negative value)

Tax Name	<u>Tax 15.00%</u>	Tax Scope	<u>Purchases</u>
Tax Computation	<u>Percentage of Price Tax Included</u>	Amount	<u>15.0000</u> %
Active	<input checked="" type="checkbox"/>		

Definition	Advanced Options
------------	------------------

Label on Invoices	<u>15.00%</u>	Included in Price	<input type="checkbox"/>
Tax Group	<u>Tax 15%</u>	Affect Base of	<input type="checkbox"/>
Company	<u>Demo Company</u>	Subsequent Taxes	

## 11.2 - Fiscal Position

*If a customer has a specific fiscal position, the default tax may be replaced by another*

- specific tax on a specific product
- TaxCloud API
- tax and account mapping

Fiscal Position	European Companies	Detect Automatically	<input checked="" type="checkbox"/>
Use TaxCloud API	<input type="checkbox"/>	VAT required	<input checked="" type="checkbox"/>
Company	Demo Company	Country Group	Europe
		Country	

Tax Mapping	Account Mapping
-------------	-----------------

Tax on Product	Tax to Apply
Tax 15.00% (Sales)	0 (Sales)
Tax 15.00% (Purchases)	0 (Sales)

## 11.2 - Fiscal Position

- automatically applied, based on some rules
- manually applied on a transaction
- assigned to a partner, on its contact form

## 11.3 - Tax Include/Exclude

*Handle the very specific use case where you need to handle the two prices (tax excluded and included) on the product form within the same company.*

## 11.3 - Tax Include/Exclude

- choose only one and stick to it: price without taxes or price with taxes included
- define which default tax related to the product
- let Odoo compute the other one automatically, based on the pricelist and fiscal position
- negotiate your contracts with customers accordingly

## 11.3 - Tax Include/Exclude

1. always store the default price TAX EXCLUDED on the product form, and apply a tax (price included on the product form)
2. create a pricelist with prices in TAX INCLUDED, for specific customers
3. create a fiscal position that switches the tax excluded to a tax included
4. assign both the pricelist and the fiscal position to customers who want to benefit to this pricelist and fiscal position



## 11.3 - Tax Include/Exclude

- your product default sale price is 8.26€ tax excluded
- but we want to sell it at 10€, tax included, in our shops or eCommerce website

## 11.4 - Cash Basis Tax

<b>Tax Name</b>	Tax 15.00%	<b>Tax Type</b>	Sales
<b>Tax Computation</b>	Percentage of Price	<b>Tax Scope</b>	
<b>Active</b>	<input checked="" type="checkbox"/>	<b>Amount</b>	15.0000%

Definition

Advanced Options

<b>Label on Invoices</b>	15.00%	<b>Included in Price</b>	<input type="checkbox"/>
<b>Tax Group</b>	Tax 15%	<b>Affect Base of Subsequent Taxes</b>	<input type="checkbox"/>
<b>Company</b>	Demo Company	<b>Tax Due</b>	Based on Payment
		<b>Cash Basis Transition Account</b>	111050 Temporary Tax Account

## 11.4 - Cash Basis Tax



### Cash Basis

Allow to configure taxes using cash basis

Tax Cash  
Basis  
Journal

Cash Basis Taxes



Base Tax  
Received  
Account

400000 Product Sales



## 12 - Reports

- Customize Reports
- Convert pivot view to spreadsheet and access from Documents module
- export report to xlsx

Accounting	Reporting	Configuration
	Generic Statements	
	Profit and Loss	
	Balance Sheet	
	Executive Summary	
	Cash Flow Statement	
	Partner Reports	
	Partner Ledger	
	Aged Receivable	
	Aged Payable	
	Audit Reports	
	General Ledger	
	Trial Balance	
	Consolidated Journals	
	Tax Report	
	Journals Audit	
	Management	
	Invoice Analysis	
	Depreciation Schedule	

# 13 - Analytic Accounting

Analytic Accounts / Project XYZ - Azure Interior

SAVE

DISCARD

2 / 2 < >

\$ Cost/Revenue

Analytic Account

Project XYZ

Reference

RD

Group

Projects

-

🔗

Customer

Azure Interior

-

🔗

Company

Demo Company

-

🔗

Analytic Report

PRINT PREVIEW

EXPORT (XLSX)

SAVE

📅 Oct 2020

🔍 Analytic

⌵ Options:

	Reference	Partner	Balance
▼ Projects			\$ -15,000.00
Project XYZ ▾	RD	Azure Interior	\$ -15,000.00
Asustek ▾		Wood Corner	\$ 0.00
Camp to Camp ▾		Azure Interior	\$ 0.00
CampToCamp ▾		Azure Interior	\$ 0.00
Deco Addict ▾		Deco Addict	\$ 0.00
Delta PC ▾		Ready Mat	\$ 0.00
Desertic - Hispafuentes ▾		Azure Interior	\$ 0.00
Lumber Inc ▾		Lumber Inc	\$ 0.00
Luminous Technologies ▾		Gemini Furniture	\$ 0.00
Millennium Industries ▾		Gemini Furniture	\$ 0.00
Nebula ▾		Azure Interior	\$ 0.00
Our Super Product ▾		Deco Addict	\$ 0.00
Seagate P2 ▾		Deco Addict	\$ 0.00
Spark Systems ▾		Wood Corner	\$ 0.00
▶ Departments			\$ 0.00
▶ Internal			\$ 0.00
▶ Accounts without a group			\$ -3,550.00

# 13 - Analytic Accounting



Analytic Tags / Bookcase

**SAVE** DISCARD 2 / 2 < >

Analytic Tag Bookcase

Analytic Distribution ☒

Company

Analytic Account	Percentage
[RD] Project XYZ - Azure Interior	100.00 
[OD] Office Design	100.00 
Add a line	

- auto create an analytic account when creating a project

# 14 - Inventory Valuation

Balance Sheet		
PRINT PREVIEW	EXPORT (XLSX)	SAVE
As of 10/07/2020 • Comparison: • Journals: All • Analytic • Options: Posted Entries Only •		
ASSETS	\$ 733,547.45	TA
Current Assets	\$ 733,547.45	CA
Bank and Cash Accounts	\$ 4,841.87	BA
Receivables	\$ 730,250.00	REC
Current Assets	\$ -1,544.42	CAS
101702 Bank Suspense Account	\$ -4,841.87	
110100 Stock Valuation	\$ 1,100.00	
110200 Stock Interim (Received)	\$ -350.00	
131000 Tax Paid	\$ 2,547.45	
Prepayments	\$ 0.00	PRE
Plus Fixed Assets	\$ 0.00	FA
Plus Non-current Assets	\$ 0.00	PNCA

# 15 - Asset Management

Assets / New

SAVE

DISCARD

CONFIRM

COMPUTE DEPRECIATION

DRAFT

RUNNING

0

Posted Entries

Asset Name

e.g. Laptop iBook

Asset Values

Set manually the original values or select the related purchases

Original Value

\$0.00

Acquisition Date

12/31/2020

Current Values

Not Depreciable Value

\$0.00

Depreciable Value

\$ 0.00

Book Value

\$ 0.00

Depreciation Method

Method ☒ Straight Line ☐ Degressive ☐ Accelerated Degressive

Duration

5

Years

Prorata Temporis

☐

Start Depreciating

12/31/2020

Accounting

Company

Demo Company

Fixed Asset Account

Depreciation Account

Expense Account

Journal

Analytic Account

Analytic Tag

Existing Depreciation Schedule

Depreciated Amount

\$0.00

Existing Depreciations

0

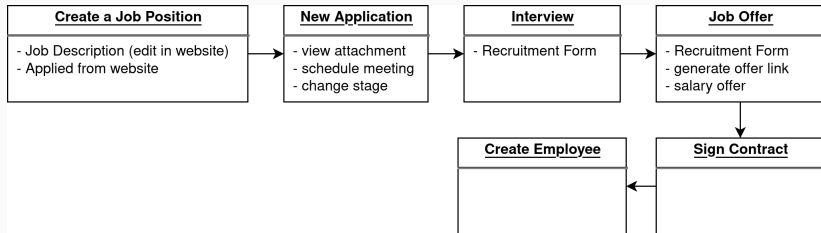
First Depreciation Date



## **XI. HR**

---

# 1. Recruitment



# 1. Recruitment

Create: Contract Template ×

NEW RUNNING EXPIRED CANCELLED

## HR Contract Template

Employee		Start Date	10/08/2020
Department		End Date	
Job Position		Working Schedule	Standard 40 hours/week
Company	Demo Company	HR Responsible	
Contract Type	PFI		
Salary Structure Type	Employee		

Contract Details

Salary Information

Monthly Advantages in Cash

Wage	10.00	/ month
Wage update with holidays retenues	9.87	/ month

Employee Costs

Employee Budget	120.00	/ year
Monthly Equivalent Cost	10.00	/ month

Yearly Advantages

Paid Time Off	3	/ year
---------------	---	--------

SAVE

DISCARD

## 2. Referral Recruitment

- referral links has tracker
- config:
  - levels
  - rewards
  - alert
  - onboarding

Dashboard / Job Positions

Search...

▼ Filters    ≡ Group By    ★ Favorites

### Consultant

1 Open Position 85 Points

We are currently looking for someone like that to join our Consultant team.

[REFER FRIEND](#) [MORE INFO](#)

[SHARE NOW](#) [SHARE NOW](#) [SHARE NOW](#) [SHARE NOW](#)

### Marketing and Community Manager

3 Open Positions 85 Points

The Marketing Manager defines the mid- to long-term marketing strategy for his covered market segments in the World. He develops and monitors the annual budget in collaboration with Sales. He defines the products and customers portfolio according to the marketing plan. This mission requires strong collaboration with Technical Service and Sales.

[REFER FRIEND](#) [MORE INFO](#)

[SHARE NOW](#) [SHARE NOW](#) [SHARE NOW](#) [SHARE NOW](#)

### Experienced Developer

4 Open Positions 85 Points

We are currently looking for someone like that to join our Web team. Someone who can snap out of coding and perform analysis or meet clients to explain the technical possibilities that can meet their needs.

[REFER FRIEND](#) [MORE INFO](#)

[1 CLICK\(5\)](#) [SHARE NOW](#) [SHARE NOW](#) [SHARE NOW](#)

## 2. Referral Recruitment

Alerts / New

SAVE

DISCARD

Date From	10/11/2020	▼
Date To	10/22/2020	▼
Company	Demo Company	▼ 
On Click	<p><input type="radio"/> Not Clickable</p> <p><input checked="" type="radio"/> Go to All Jobs</p> <p><input type="radio"/> Specify URL</p>	
Alert	<u>New jobs were added!</u>	

## 3. Employee

Employees / Noob Misa

EDIT CREATE

Print Action

### Noob Misa

Marketing Officer



Work Mobile

Work Phone +1 (650) 691-3277 SMS

Work Email

Company Demo Company

Department

Manager

Coach

Marketing

Mitchell Admin

Audrey Peterson

Resumé

Work Information

Private Information

HR Settings

#### Location

Work Address

Demo Company  
250 Executive Park Blvd, Suite 3400  
San Francisco CA 94134  
United States

Work Location

#### Approvers

Time Off Mitchell Admin

Expense Mitchell Admin

Timesheet Mitchell Admin

#### Schedule

Working Hours Standard 40 hours/week

Timezone Europe/Brussels

#### Planning

Default Planning Role

Planning Roles

#### Organization Chart



Mitchell Admin  
Chief Executive Officer

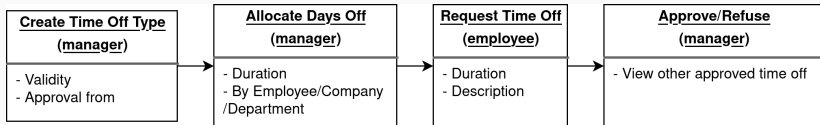
6



Noob Misa  
Marketing Officer

## 4. Attendance

- Employee PIN/badge (kiosk mode)
- Time off application:
  - Time off type
  - Allocate day off for each type
  - Request a Time Off
  - Report



## 4. Attendance

### Sick Time Off

#### Options

Payroll Code

Take Time Off in

☒ Day

☐ Half Day

☐ Hours

#### Validity

From

01/01/2020

To

#### Allocation Requests

Mode

☒ No Limit

☐ Allow Employees Requests

☐ Set by Time Off Officer

Responsible

Mitchell Admin

#### Time Off Requests

Approval

☐ No Validation

☒ By Time Off Officer

☐ By Employee's Manager

☐ By Employee's Manager and Time Off Officer

#### Notification

Time Off Notification Subtype

Sick Time Off

Allocation Notification Subtype

Allocation

#### Calendar

Display Time Off in Calendar

☒

Color in Report

Red

Company

Demo Company

#### Timesheet

Project

Internal

Task for timesheet

Time Off



## 4. Attendance

All Time Off / Mitchell Admin on Annual Time Off: 1.00 days (2020-10-23)

EDITCREATE

Action

VALIDATEREFUSE

TO APPROVESECOND APPROVALAPPROVED

Annual Time Off

DatesFrom 10/23/2020 To 10/23/2020

Duration1.00 Days

Description

ModeBy Employee

EmployeeMitchell Admin

DepartmentManagement

Reported in last  
payslips

Manager's Comment

Mitchell Admin in 2020

Sick Time Off2 day(s)

Management in October

Sharlene Rhodes: 1 day(s)

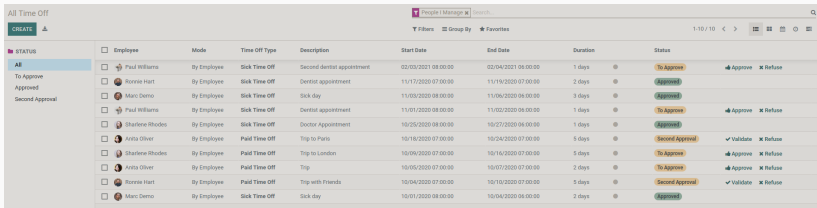
10/25/2020 - 10/26/2020

Mitchell Admin: 2 day(s)

10/20/2020 - 10/22/2020

## 4. Attendance

- An employee's leave can only be approved by a user in the HR Officer group (or higher)




The screenshot displays the 'All Time Off' application interface. At the top, there's a header with 'All Time Off' on the left, 'People | Manage' and a search bar in the center, and a user profile icon on the right. Below the header, there's a navigation bar with 'CREATE' and a dropdown arrow. The main content area is a table with columns: Employee, Mode, Time Off Type, Description, Start Date, End Date, Duration, and Status. The table lists several time-off requests for different employees, including Paul Williams, Ronnie Hart, Marc Demro, and Sharlene Rhodes. Each request has a checkbox, a status button (e.g., 'To Approve', 'Approved', 'Second Approval'), and action buttons (e.g., 'Approve', 'Refuse', 'Validate').


STATUS	Employee	Mode	Time Off Type	Description	Start Date	End Date	Duration	Status	
All	<input type="checkbox"/> Paul Williams	By Employee	Sick Time Off	Second dental appointment	02/03/2021 08:00:00	02/04/2021 08:00:00	1 days	To Approve	Approve Refuse
To Approve	<input type="checkbox"/> Ronnie Hart	By Employee	Sick Time Off	Dentist appointment	11/17/2020 07:00:00	11/19/2020 07:00:00	2 days	Approved	
Approved	<input type="checkbox"/> Marc Demro	By Employee	Sick Time Off	Sick day	11/03/2020 08:00:00	11/06/2020 08:00:00	3 days	Approved	
Second Approval	<input type="checkbox"/> Paul Williams	By Employee	Sick Time Off	Dental appointment	11/01/2020 08:00:00	11/02/2020 08:00:00	1 days	To Approve	Approve Refuse
	<input type="checkbox"/> Sharlene Rhodes	By Employee	Sick Time Off	Doctor Appointment	10/25/2020 08:00:00	10/27/2020 08:00:00	1 days	Approved	
	<input type="checkbox"/> Anita Oliver	By Employee	Paid Time Off	Trip to Paris	10/18/2020 07:00:00	10/24/2020 07:00:00	5 days	Second Approval	Validate Refuse
	<input type="checkbox"/> Sharlene Rhodes	By Employee	Paid Time Off	Trip to London	10/09/2020 07:00:00	10/16/2020 07:00:00	5 days	To Approve	Approve Refuse
	<input type="checkbox"/> Anita Oliver	By Employee	Paid Time Off	Trip	10/05/2020 07:00:00	10/07/2020 07:00:00	2 days	To Approve	Approve Refuse
	<input type="checkbox"/> Ronnie Hart	By Employee	Paid Time Off	Trip with friends	10/04/2020 07:00:00	10/10/2020 07:00:00	5 days	Second Approval	Validate Refuse
	<input type="checkbox"/> Marc Demro	By Employee	Sick Time Off	Sick day	10/01/2020 08:00:00	10/04/2020 08:00:00	2 days	Approved	

## 5. Appraisal



- Request(from employee)/Create

### Appraisal


☒ **Appraisal Plans**   
Automatically generate appraisals  
[→ Appraisal Plans](#)

☐ **360 Feedback**   
Ask to fill a survey to other employees





**Confirmation Email Template**  
Automatic email sent after confirm the appraisal  











Employee	Hr Appraisal: Confirm Appri	
Manager	Hr Appraisal: Confirm Appri	

### Feedback Templates

**Feedback Templates**   
Configure Feedback Templates by Job

#### Employee Feedback Template

 B I U  NAN  A 





Does my company recognize my value ?











What are the elements that would have the best impact on my work performance?

What are my best achievement(s) since my last appraisal?

What do I like / dislike about my job, the company or the management?

#### Manager Feedback Template

 B I U  NAN  A 

What are the responsibilities that the employee performs effectively?

How could the employee improve?

Short term (6-months) actions / decisions / objectives

Long term (>6months) career discussion, where does the employee want to go, how to help him reach this path?

88

## 5. Appraisal

- Request(from employee)/Create

Employees / Anita Oliver / Anita Oliver

SAVE

DISCARD

CONFIRM

TO CONFIRM

CONFIRMED

DONE

Employee's Goals

No Meeting

Employee

Anita Oliver

▼

✎

Manager

Ronnie Hart

▼

Appraisal Deadline

10/22/2020

▼

Job Position

Experienced Developer

Company

Demo Company

Employee Feedback

Does my company recognize my value ?

What are the elements that would have the best impact on my work performance?

What are my best achievement(s) since my last appraisal?

What do I like / dislike about my job, the company or the management?

How can I improve (skills, attitude, etc)?

Manager Feedback

What are the responsibilities that the employee performs effectively?

How could the employee improve?

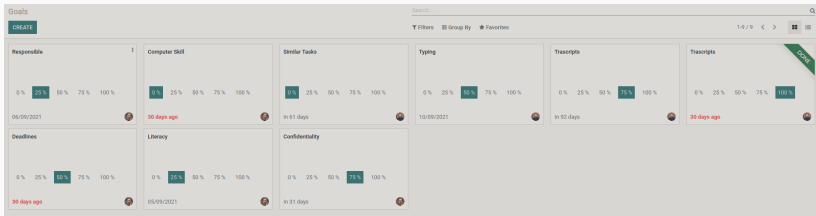
Short term (<6months) actions / decisions / objectives

Long term (>6months) career discussion, where does the employee want to go, how to help him reach this path?

89

# 5. Appraisal

- Goals



## 6. Manage Skills and Resumes

- Skills Management (employee)

Resumé

Work Information

Private Information

HR Settings

Experience

ADD

10/09/2020 - Current

Demo Company

eating

09/01/2019 - 08/31/2020

Internship in MISA Inc

Education

ADD

01/01/2016 - 07/31/2018

NOOB University

Skills

Languages

ADD

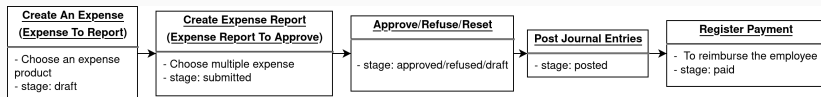
SpanishB275%

Music

ADD

SingingL250%

## 7. Expenses



## 7. Expenses

- Expense Products

Expense Products / [EXP\_AF] Air Flight

SAVE

DISCARD

Product Name

Air Flight



### General Information

Cost 700.00

Internal Reference EXP\_AF

*Use this reference as a subject prefix when submitting by email.*

Company

### Accounting

Expense Account

Vendor Taxes

Customer Taxes

### Invoicing

Invoicing Policy Delivered quantities

Re-Invoice Expenses At cost



# 7. Expenses

- Expense Report

My Expenses to Report / Laptop / Business Trip

EDIT CREATE

Print Action


APPROVE REFUSE RESET TO DRAFT

DRAFT SUBMITTED APPROVED POSTED PAID

0 Documents

## Business Trip

**Employee**  
Manager  
**Paid By**  
Company

 Mitchell Admin  
Employee (to reimburse)  
Demo Company

Expense Other Info

Expense Date	Description	Customer to Reinvoice	Taxes	Total
10/09/2020	Travel Fee Flight	0 <a href="#">View Attachments</a>	Tax 15.00%	\$ 805.00
04/03/2020	Laptop	0 <a href="#">View Attachments</a>		889.00 €
04/03/2020	Screen	0 <a href="#">View Attachments</a>		289.00 €

Total Amount: \$ 2,316.84

## 7. Expenses

- Auto create entry and reconcile

BNK1/2020/10/0002 (Mitchell Admin: Lunch in Ne...

EDIT

CREATE

Print

Action

1 / 1

< >

REVERSE ENTRY

RESET TO DRAFT

DRAFT

POSTED

Reconciled  
Entries

### BNK1/2020/10/0002

Reference Mitchell Admin: Lunch in NewYork

Accounting Date 10/09/2020

Journal Bank

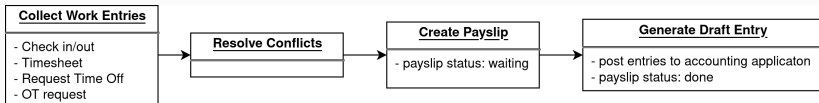
Journal Items

Other Info

Account	Partner	Label	Debit	Credit	Tax Grids	
101403 Outstand...	Mitchell Admin	Vendor Payment \$ 20.00 - Mitchell Admin - 10/09/2020	\$ 0.00	\$ 20.00		
211000 Account ...	Mitchell Admin	Vendor Payment \$ 20.00 - Mitchell Admin - 10/09/2020	\$ 20.00	\$ 0.00		

## 8. Payroll

- Contract contains information about salary structure type, pay structures



## 8. Payroll

- Payroll generate payslip depends on employee's contracts

Create: Contract Template ×

NEW RUNNING EXPIRED CANCELLED

### HR Contract Template

Employee		Start Date	10/08/2020
Department		End Date	
Job Position		Working Schedule	Standard 40 hours/week
Company	Demo Company	HR Responsible	
Contract Type	PFI		
Salary Structure Type	Employee		

Contract Details Salary Information

#### Monthly Advantages in Cash

Wage	10.00	/ month
Wage update with holidays retenues	9.87	/ month


#### Employee Costs

Employee Budget	120.00	/ year
Monthly Equivalent Cost	10.00	/ month

#### Yearly Advantages

Paid Time Off	3	/ year
---------------	---	--------

## 8. Payroll

 2 Structures

### Employee

Country		Default Scheduled Pay	Monthly
Wage Type	Monthly Fixed Wage	Default Working Hours	Standard 40 hours/week
		Regular Pay Structure	Regular Pay
		Default Work Entry Type	Attendance

**Figure 11:** Salary Structure Type

## 8. Payroll

### Regular Pay

Type

Employee

Report

Payslip

Use Worked Day Lines

☒

Scheduled Pay

Monthly

Country

Salary Journal

Salaries

Salary Rules

Unpaid Work Entry Types

Other Input

Name	Code	Category	Partner
Basic Salary	BASIC	Basic	
House Rent Allowance	HRA	Allowance	House Rent Allowance Register
Conveyance Allowance	CA	Allowance	
Conveyance Allowance For Gravie	CAGG	Allowance	
Meal Voucher	MA	Allowance	Meal Voucher Register
Sum of Allowance category	SUMALW	Allowance	
Gross	GROSS	Gross	
Provident Fund	PF	Deduction	Provident Fund Register
Professional Tax	PT	Deduction	Professional Tax Register
Net Salary	NET	Net	

Figure 12: Pay Structure

## 8. Payroll

Name  
**Basic Salary**

---

Category  
**Basic**

---

Code **BASIC** Sequence **1**

Salary Structure **Regular Pay** Active ☒

Appears on Payslip ☒

**General** Description Accounting

---

Conditions

Condition Based on **Always True**

---

Computation

Amount Type **Python Code**

Python Code **result = payslip.paid\_amount**

---









Company Contribution

Partner

---

**Figure 13: Salary Rule**

## 8. Payroll

Work Entry Types		Search...	
<a href="#">CREATE</a> 		 Filters	 Group By  Favorites 1-10 / 10    
<input type="checkbox"/>	Name	Code	
<input type="checkbox"/>	+ Attendance	WORK100	
<input type="checkbox"/>	+ Generic Time Off	LEAVE100	
<input type="checkbox"/>	+ Compensatory Time Off	LEAVE105	
<input type="checkbox"/>	+ Home Working	WORK110	
<input type="checkbox"/>	+ Unpaid	LEAVE90	
<input type="checkbox"/>	+ Sick Time Off	LEAVE110	
<input type="checkbox"/>	+ Legal Leaves 2020	LEAVE120	
<input type="checkbox"/>	+ Extra Hours	WORK300	
<input type="checkbox"/>	+ Long Term Time Off	LEAVE200	
<input type="checkbox"/>	+ Out of Contract	OUT	

**Figure 14:** Work Entry Types



## 9. Payroll

- Resolve conflicts before generating payslips

Work Entry

Search...

← TODAY → DAY WEEK MONTH GENERATE PAYSLIPS

▼ Filters ▢ Group By ★ Favorites

Work Entries	11 October 2020 - 17 October 2020						
	Sunday, 11th	Monday, 12th	Tuesday, 13th	Wednesday, 14th	Thursday, 15th	Friday, 16th	Saturday, 17th
Anita Oliver		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	
Mitchell Admin		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	
Randall Lewis		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	
Roger Scott		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	
Ronnie Hart		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	
Walter Horton		Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	Attendance: ...	

Figure 15: Work Entry

## 9. Payroll

Payslips To Pay / Salary Slip - Walter Horton - September 2020

[EDIT](#)[CREATE](#)[Print](#)[Action](#)[CREATE DRAFT ENTRY](#)[COMPUTE SHEET](#)[CANCEL PAYSIP](#)[RECOMPUTE WORKED DAYS](#)[PRINT](#)[DRAFT](#)[WAITING](#)[DONE](#)

### Walter Horton

Period 09/01/2020 - 09/30/2020

Reference SLIP/024

Contract [Walter Horton Contract](#)

Structure [Regular Pay](#)



Payslip Name Salary Slip - Walter Horton - September 2020

[Worked Days & Inputs](#)[Salary Computation](#)[Accounting Information](#)

Name	Code	Category	Quantity	Rate (%)	Rule	Amount	Total
Basic Salary	BASIC	Basic	1.00	100.0000	Basic Salary	4,600.00	4,600.00
House Rent Allowance	HRA	Allowance	1.00	40.0000	House Rent Allowance	4,600.00	1,840.00
Conveyance Allowance	CA	Allowance	1.00	100.0000	Conveyance Allowance	800.00	800.00
Conveyance Allowance For Gravie	CAGG	Allowance	1.00	100.0000	Conveyance Allowance For Gravie	600.00	600.00
Meal Voucher	MA	Allowance	22.00	100.0000	Meal Voucher	10.00	220.00
Sum of Allowance category	SUMALW	Allowance	1.00	100.0000	Sum of Allowance category	0.00	0.00
Gross	GROSS	Gross	1.00	100.0000	Gross	8,060.00	8,060.00
Provident Fund	PF	Deduction	1.00	-12.5000	Provident Fund	4,600.00	-575.00
Professional Tax	PT	Deduction	1.00	100.0000	Professional Tax	-200.00	-200.00
Net Salary	NET	Net	1.00	100.0000	Net Salary	7,285.00	7,285.00

Figure 16: Payslip

## 9. Payroll

Journal Entries							Search...
<a href="#">CREATE</a> 							▼ Filters   ≡ Group By   ★ Favorites
							1-19 / 19   <   >
<input type="checkbox"/> Date	Number	Partner	Reference	Journal	Company	Total	Status
<input type="checkbox"/> 10/31/2020	SAL/2020/10/0001		October 2020	Salaries	Demo Company	10,840.00	<a href="#">Draft</a>
<input type="checkbox"/> 10/31/2020	/		October 2020	Salaries	Demo Company	12,300.00	<a href="#">Draft</a>
<input type="checkbox"/> 10/31/2020	/		October 2020	Salaries	Demo Company	12,300.00	<a href="#">Draft</a>
<input type="checkbox"/> 10/31/2020	/		October 2020	Salaries	Demo Company	10,840.00	<a href="#">Draft</a>

**Figure 17:** Generate entries from payslips

## 9. Payroll

Other features: - report the expenses in payslip to reimburse employee directly in payslip - structure types: defining payroll localization - payroll structure: rule to compute the payslip - structure + computation rules = salary rules

# 10. Fleet Management

Fleet

Vehicles

Reporting

Configuration

Vehicles / Opel/Astra

EDIT

CREATE

Vehicles

Contracts

Services

Odometers

5

Action

NEW REQUEST

TO ORDER

ORDERED

REGISTERED

DOWNGRADED

RESERVE

WAITING LIST

1 Drivers History

1 Contracts

1 Services

14 Odometer

Opel/Astra

1-ACK-205

Senior

Employee Car

Break

Driver

Driver

Mobility Card

Future Driver

Plan To Change Car

Assignment Date

Location

Grand-Rosiere

Contract

Manager

First Contract Date

Mitchell Admin

10/06/2020

Engine

Transmission

Fuel Type

CO2 Emissions

Horsepower

0.00 g/km

0

Vehicle

Last Odometer

Immatriculation Date

Chassis Number

Catalog Value (VAT Incl.)

Purchase Value

Residual Value

Company

Demo Company

Model

Seats Number

Doors Number

Color

Model Year

0

5

Black

Description

## 10. Fleet Management

Vehicles / Opel/Astra/1-ACK-205 / Contracts / Leasing Opel/Astra/1-ACK-205

EDIT CREATE

Action

CLOSE CONTRACT

INCOMING IN PROGRESS EXPIRED CLOSED

### Leasing Opel/Astra/1-ACK-205

#### Contract Information

Responsible	Mitchell Admin
Type	Leasing
Vendor	Deco Addict
Reference	
Activation Cost	\$ 0.00
Recurring Cost	\$ 150.00 Weekly

#### Vehicle Information

Vehicle	Opel/Astra/1-ACK-205
Current Driver	YourCompany, Marc Demo
Invoice Date	01/01/2020
Contract Start Date	12/22/2019
Contract Expiration Date	10/05/2020

#### Included Services

Depreciation and Interests Tax roll Omnium

#### Terms and Conditions

Weekly leasing contract

Figure 19: Vehicles Contract

## 10. Fleet Management

Vehicles / Opel/Astra/1-ACK-205 / Services / New

SAVE

DISCARD

TO DO

RUNNING

DONE

CANCELLED

Description

Service Type

Date

Cost

Vendor

Repair and maintenance

10/13/2020

\$0.00

Vehicle

Driver

Odometer Value

Opel/Astra/1-ACK-205

YourCompany, Marc Demo

0.00

km

Notes

Write here any other information related to the service completed.

**Figure 20: Vehicle Service**

Thank you for listening!



- Odoo doc vietsub
- Odoo Book from OpenERP

# Contacts

Contacts / Azure Interior

[EDIT](#) [CREATE](#)

[Action](#)

★ 2 Opportunities

📅 1 Meetings

\$ 0 Sales

🔄 0 Subscriptions

☰ 6 Tasks

🎫 5 Tickets

🛒 2 Purchases

More -

## Azure Interior

### Company Address

4557 De Silva St  
Fremont California (US) 94538  
United States

Tax ID

### Phone

+58 212 681 0538 [SMS](#)

### Mobile

### Email

[vauxoo@yourcompany.example.com](mailto:vauxoo@yourcompany.example.com)

### Website Link

<http://www.azure-interior.com>

### Tags

[Services](#)

🚚 100 %  
On-time Rate

☰ \$ 365,125.00  
Due

📄 \$ 317,500.00  
Invoiced

📄 2  
Vendor Bills

📄 Partner Ledger

📄 0  
Documents

🌐 Go to  
Website

### Contacts & Addresses

[Sales & Purchase](#)

[Accounting](#)

[Internal Notes](#)

[Partner Assignment](#)



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