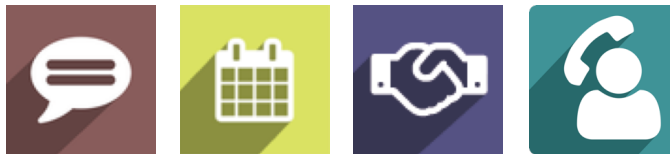


# Introduction to Odoo Business Apps

English Version



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## 1. Welcome on board

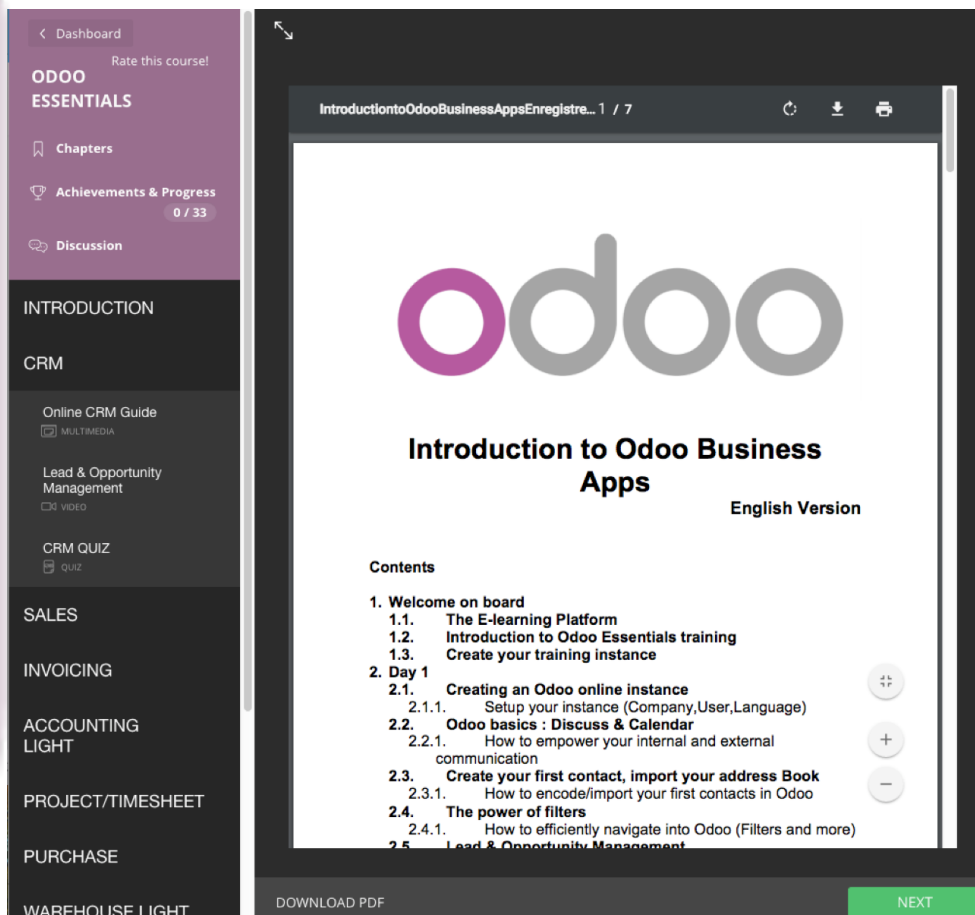
Odoo is the most popular Open Source of Business Applications, with tons of different features in various functional areas. Odoo is 100% web-based, you only need a web browser to get started (Google Chrome, Safari, Internet Explorer, Mozilla Firefox).

### 1.1 The E-learning Platform:

We have invested in an E-learning platform to structure the training. To give you the opportunity to prepare yourself at your pace. The platform is also responsive for mobile phones and tablets, giving the best Odoo learning experience wherever you want!

Each Chapter contains:

1. An introduction PDF with some explanations and exercises.
2. Training videos focused on the app.
3. A small quiz at the end.



The screenshot displays the Odoo E-learning platform interface. On the left is a sidebar menu with categories: Dashboard, ODoo ESSENTIALS, Chapters, Achievements & Progress (0 / 33), Discussion, INTRODUCTION, CRM, Online CRM Guide (MULTIMEDIA), Lead & Opportunity Management (VIDEO), CRM QUIZ (QUIZ), SALES, INVOICING, ACCOUNTING LIGHT, PROJECT/TIMESHEET, PURCHASE, and WAREHOUSE LIGHT. The main content area shows the title 'Introduction to Odoo Business Apps' with the Odoo logo and 'English Version'. Below this is a 'Contents' section listing the following topics:

- 1. Welcome on board
  - 1.1. The E-learning Platform
  - 1.2. Introduction to Odoo Essentials training
  - 1.3. Create your training instance
- 2. Day 1
  - 2.1. Creating an Odoo online instance
    - 2.1.1. Setup your instance (Company, User, Language)
  - 2.2. Odoo basics : Discuss & Calendar
    - 2.2.1. How to empower your internal and external communication
  - 2.3. Create your first contact, import your address Book
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  - 2.4. The power of filters
    - 2.4.1. How to efficiently navigate into Odoo (Filters and more)
  - 2.5. Lead & Opportunity Management

At the bottom of the main content area, there are buttons for 'DOWNLOAD PDF' and 'NEXT'.

## 1.2 Introduction to Odoo Functional training:

The Odoo Functional training has for purpose to initiate you to Odoo most popular apps such as: CRM, SALES, INVOICING, PURCHASE, PROJECT, HR, WAREHOUSE and MRP.

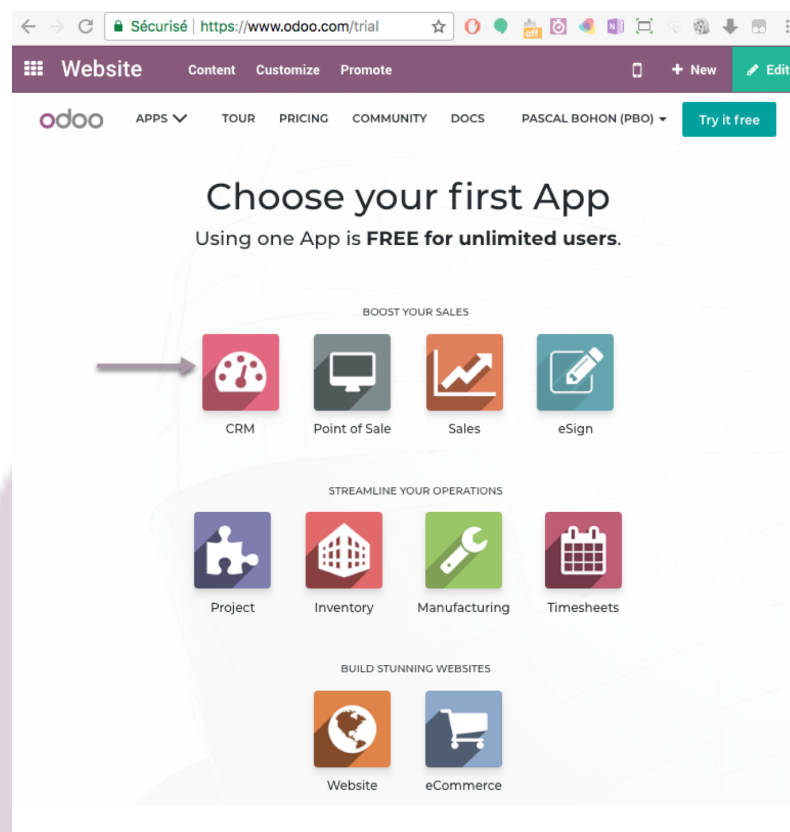
New training material will be uploaded on the go with basic and advanced topics.

## 1.3 Create your training instance:

In order to be able to train yourself during your e-learning period, you'll be able to subscribe into our SaaS platform for a training instance. The training instance will be valid for a period of 6 months, giving you enough time to train.

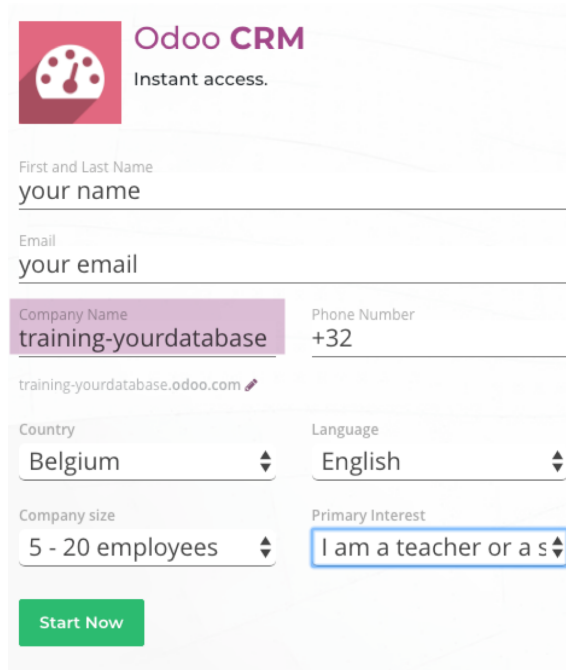
### Step 1:

Go to <https://www.odoo.com/trial> , choose the CRM app



## Step 2:

When entering your company name, which will also be the database name, precede it by “training-“ in order to activate the training trial. Click start now button. Your database is being created. Success!



The screenshot shows the Odoo CRM registration form. At the top, there is a red square logo with a white Odoo icon and the text "Odoo CRM" and "Instant access." Below this, the form has several input fields: "First and Last Name" with the placeholder "your name", "Email" with the placeholder "your email", "Company Name" with the value "training-yourdatabase", and "Phone Number" with the value "+32". Below these, there is a URL field showing "training-yourdatabase.odoo.com". Further down, there are dropdown menus for "Country" (set to "Belgium"), "Language" (set to "English"), "Company size" (set to "5 - 20 employees"), and "Primary Interest" (set to "I am a teacher or a s"). At the bottom, there is a green "Start Now" button.

## 2. Introduction

### 2.1 Creating an Odoo online instance

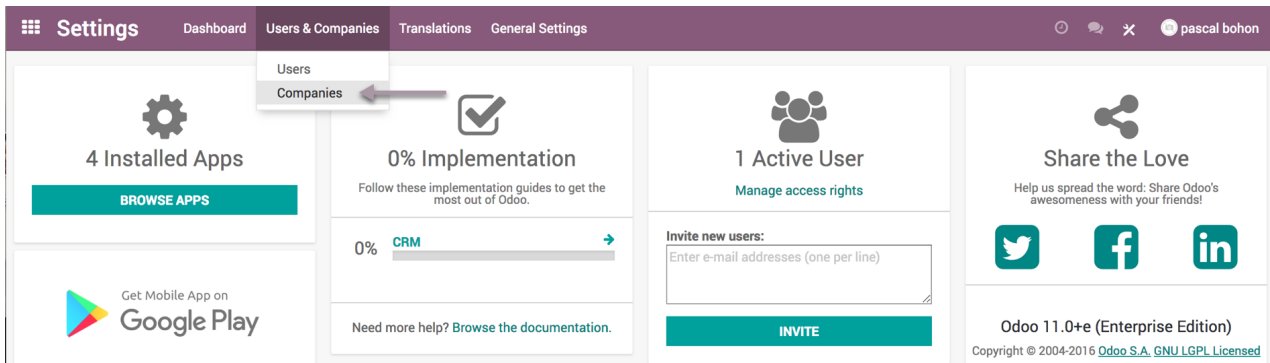
Go to <http://www.odoo.com/trial> and click CRM. Then, enter the name of your instance (with “-” if needed but without spaces or “\_”), precede the name by: training- and click Start Now. Next, enter the required data to create your Odoo account (necessary to create the admin user) and click Start Using.

You now have your own instance which will be available at the following web address: `yourname.odoo.com`. CRM has already been installed.

Let’s do some settings first!

### 2.1.1.1 Setup your instance (Company, User, Language): Enter your own data.

-> Enter company Data: Go to Settings / Users & Companies / Companies:



Company Name: **Evolve**

General Information

Address: Mainstreet, Street 2..., SAN FRANCISCO, California, 94132, United States

Company Tagline: e.g. Global Business Solutions

Website: http://www.evolve.com

Phone:

Email: info@evolve.com

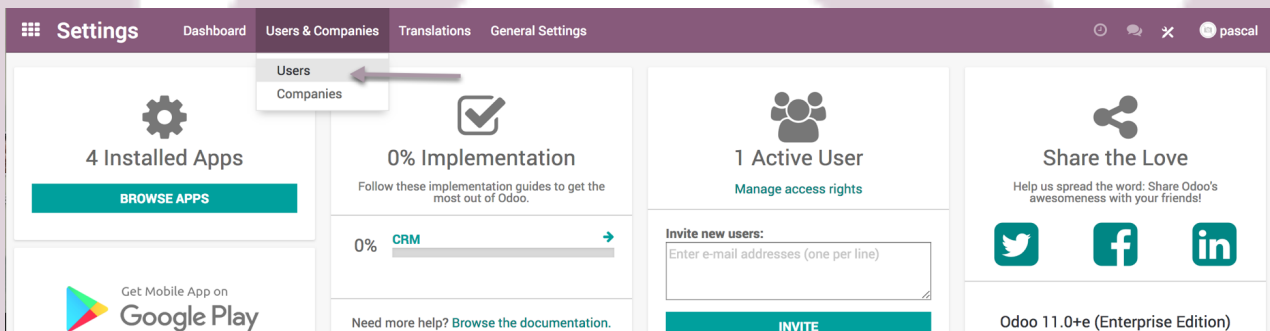
TIN:

Company Registry:

Currency: USD

Report Footer: e.g. Your Bank Accounts, one per line

-> Create user: Go to settings / Users & Companies / Users



Click 'Create' button: create new user for your colleague. Do not use same email address. Each user should have his own email to log on.

Users / New

**SAVE** DISCARD

Remember that each user will increase your monthly fee. Check out pricing on [www.odoo.com/pricing](http://www.odoo.com/pricing).

Name

Email

-> Install a second System language:

Each user can use Odoo in his own language. Go to Settings → Translations → Load a Translation and install a second language. You can set a default language for each user in the User form. You can also change it in your Preferences (top right side of the screen).

The screenshot shows the Odoo Settings interface. The top navigation bar includes 'Settings', 'Dashboard', 'Users & Companies', 'Translations', and 'General Settings'. The 'Translations' menu is open, showing 'Languages' and 'Load a Translation'. An arrow points from the 'Load a Translation' option to a modal window titled 'Load a Translation'. This modal window has a 'Language' dropdown menu with a list of languages. The first option, 'Albanian / Shqip', is selected with a checkmark. Other visible options include Amharic, Arabic, Basque, Bosnian, Bulgarian, Burmese, Catalan, Chinese (CN), Chinese (HK), Chinese (TW), and Croatian. At the bottom of the modal are 'LOAD' and 'CANCEL' buttons.

## 2.2 Odoo basics: Discuss & Calendar

### 2.2.1

-> Start a Channel:

Users can exchange messages, attach documents and receive discussion updates concerning the channel they joined.

Every time someone posts a message to the group (or replies to a message), all the followers get a notification in their Inbox.

Invite users to join the channel and start collaborating.

-> Manage your Agenda:

Get your meetings, yours holidays, ...

Get your calendar anywhere and never forget an event.

### **Exercises**

#### **A. Channel:**

1. **Create a new Channel: 'Whole Company'**
2. **Invite users to take part to the channel.**

#### **B. Agenda:**

1. **Create a meeting and share it with some attendees in you address book. They will receive a notification by email.**

## 2.3 Create your first contact, import your address Book

If you already have a list of contacts, you would waste time if you start entering each item one by one. Let's import your contact list!

- From the List view, click Import in order to import your address book saved in CSV (Comma Separated Values, can be generated from Excel, Libre Office Calc, Google Spreadsheet, ...). Have a look at the CSV file shared in your training material repository. You have to follow the same structure. It will help you to make your first import.

- Once imported, sort the contacts by inverse alphabetical order.

Note:

- In your spreadsheet file, each column has to be dedicated to a specific Odoo field. The first row contains these dedicated fields.

Tip:

- *Odoo comes with different kinds of views: List view will show an overview of similar records at a time. To get more specific information about a record, you can switch to Form view.*

### **Exercises**

**A. Import :** In your E-learning platform, you'll find a csv file with some data.

1. Try importing this file
2. Create your own csv file and import it (use the csv template on the E-learning platform).

## 2.4 The power of filters

- **Search options:** At the top right of all views (except for the Form view) you find a search bar with several tools (click '+' to activate the drop-down menu) to configure the search or group the records. The options displayed depend on the business application.
- **Search bar:** Allows to quickly find records by typing and selecting some criteria. Matching results will be displayed.
- **Filters:** allow you to apply conditions to fields. Some filters exist by default, but you can add new ones by clicking on 'Add Custom Filters)



- **Group by:** groups record in the list according to your needs (multiple levels). By selecting 'Add custom group', you can define your own group-by possibilities.
- **Favorites:** Save current search: allow to save the current filter (becomes available in Favorites).

### **Exercises**

- A. Go to <https://demo.odoo.com>
1. *In the customer module:*
    - a. *How many companies are customer?*
    - b. *How many companies are situated in the US?*
    - c. *Witch city has the most contact person?*