

Odoo Study Guide

Core Concepts and Modules

- Know which applications are core to Odoo (e.g., Sales, Inventory,)
- Understand the purpose of Odoo Studio for customizing without coding.
- Recognize 'ORM' as Object Relational Mapping.
- CRM is used to manage customer relationships and sales pipelines.

Sales and Pricing

- Pricelists manage discounts and different product prices.
- Sales module allows for sending professional quotations.
- Product Variants represent different versions of a product (e.g., size, color).

Inventory and Logistics

- Inventory module tracks stock levels and product movements.
- 'Routes' configure procurement and delivery operations.
- FIFO isn't the only inventory valuation method.
- Quality control can block delivery of non-compliant items.

Manufacturing

- BOM (Bill of Materials) lists components needed to make a product.
- Work Centers define where production operations happen.
- Supports both Make-to-Order and Make-to-Stock workflows.

Human Resources

- HR management includes Employees, Payroll, and Contracts.
- Timesheets are not managed in the Project module.

Project Management

- Tasks are specific pieces of work in a project.
- Projects can include recurring tasks.

Accounting and Finance

- Analytic Accounts track costs/revenue by project/department.
- Fiscal Positions manage taxes by region or customer.
- Journal entries are mostly automated.
- Supports multiple currencies and asset depreciation.

Purchasing

- Purchase module handles vendors and purchase orders.
- Vendor price lists are manageable within the module.

Marketing and Communications

- Email Marketing module supports mass, personalized emails.
- Surveys can be created, analyzed, and exported.
- Marketing Automation is separate from basic email marketing.

User Interface and Customization

- Views define how data is presented.
- Kanban views are dynamic and rearrangeable.
- Dashboards are customizable.
- Chatter tracks communication on records but doesn't allow external collaboration.

Automation and Access

- Automated actions can be triggered by more than user interaction.
- User access includes Read, Write, and Create—not Modify.
- Tags help categorize and filter records.

Integration and Platform Features

- Odoo supports third-party integrations.
- App Store has both free and paid modules.
- Multiple companies can be managed in one database.
- Data backups are not automatic by default.