

## USER MANUAL



# Clever Multiple Invoice Templates

**Version: 2.0**

**Compatibility:**

Odoo 8.x, 9.x, 10.x, 11.x

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## Introduction

Clever Multiple Invoice Templates app will assist you to maintain your invoices in a superior way. Admin can set layout of the invoice in multiple ways. There are inbuilt 6 types of invoices for the references. Admin can manipulate it the way required. Admin can view Payment History in the invoice to keep a check of order details. Admin can set Text Colors, Company Details Colors and also can add product description in the Invoice. Admin can choose diverse colors with Color Picker.

## Benefits of Clever Multiple Invoice Templates

- It is an elite app to manage Order Invoices and to make them more alluring.
- Clever Multiple Invoice Templates app will help to maintain invoices in a superior way.
- Admin can set layout of the invoice in multiple ways.
- There are inbuilt 6 types of invoices for the references. Admin can manipulate it the way required.
- Admin can view Payment History in the invoice to keep a check of order details.
- Admin can set Text Colors, Company Details Colors and also can add product description in the Invoice.
- Admin can choose diverse colors with Color Picker.

## Pre-requisites

Following points must be followed before starting the Plugin installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Clever Multiple Invoice Templates.
- An e-commerce module should be present in your instance to use this app.

# Installation

## Installation Steps

**Step 1: Download and extract the zip file.**

**Step 2: Check your Odoo add-ons path.**

- It should be same as defined in Odoo Config file.
- Config files are mostly saved in /etc folder. For e.g. /etc/odoo.conf
- Open Config file:
  - Give the command: `sudo/etc/odoo.conf`
  - Config file content: `addons_path = /opt/odoo/addons`

**Step 3: Open Terminal and go to download location**

- For e.g. if the download location path is: /home/odoo/Downloads then the command to be written in the terminal would be: `cd/home/odoo/Downloads`

**Step 4: Copy download modules to addons path**

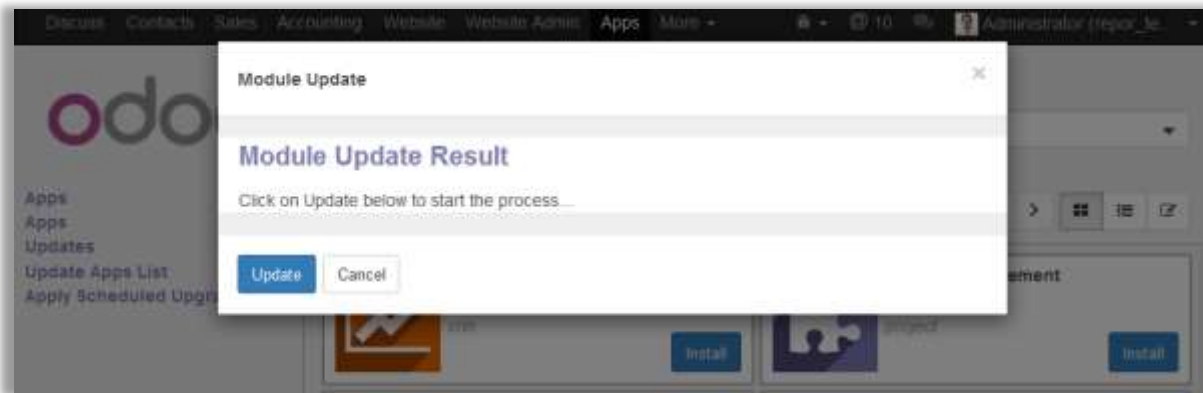
- Give the below mentioned commands to perform copy operation:
  - `$cd /home/odoo/Downloads/biztech_report_template`
  - `$cd v8`
  - `$sudocp biztech_report_template/opt/odoo/addons`

**Step 5: Restart Odoo server**

**Step 6: Login with the admin credentials in your odoo instance**

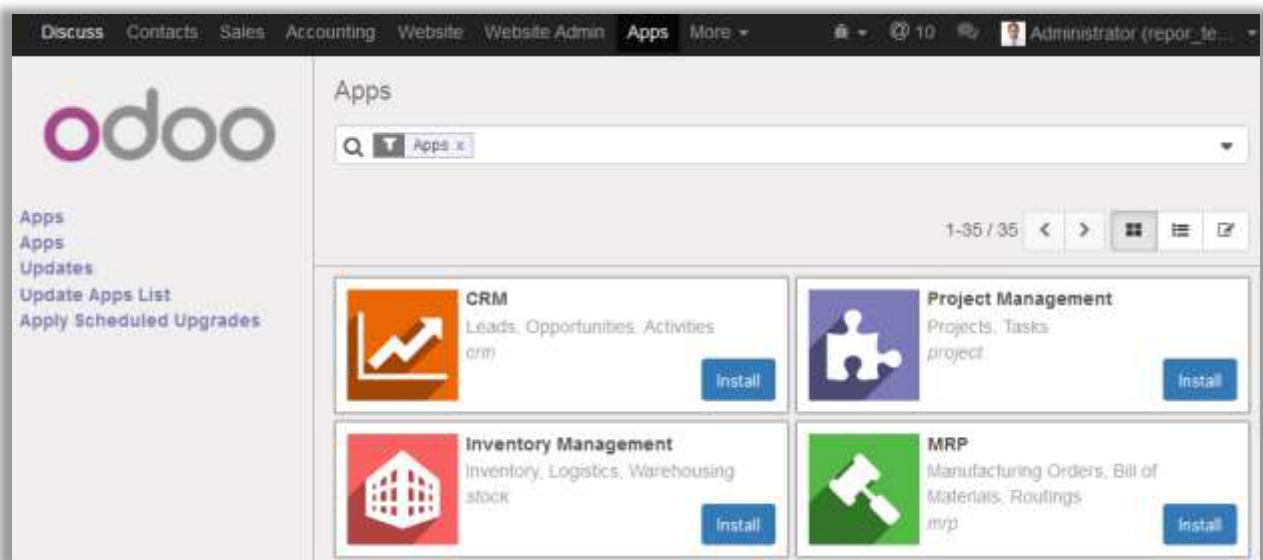
### Step 7: Go to Settings/Update Module List.

- Click on 'Update' button.



### Step 8: Go to Settings/Local Modules

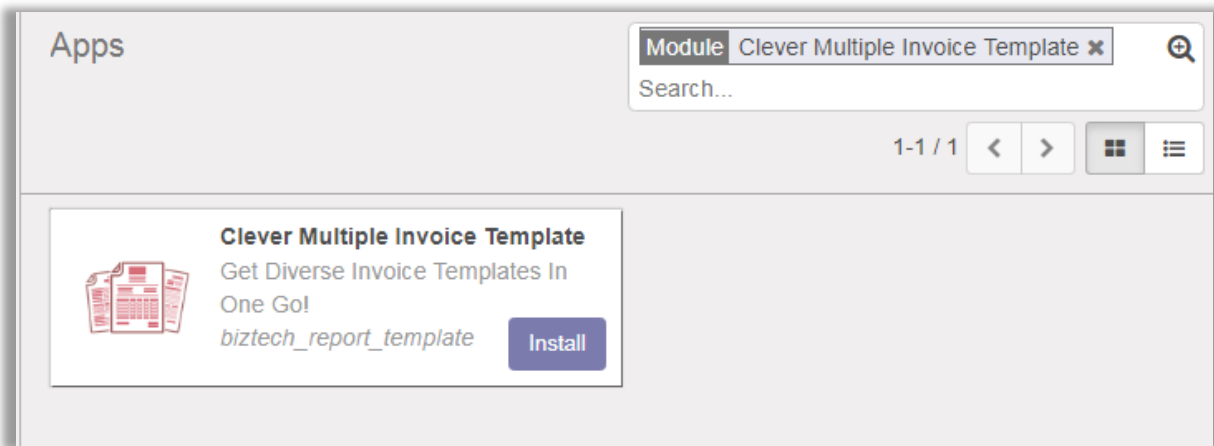
- Remove search filter.



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- Enter module name in the search box provided in the top right corner of the page. For e.g. here write “Clever Multiple Invoice Template”.
- Click on ‘Install’ button.



# App Configuration

## Configuring Invoice Template

- Go to **Settings** -> **Companies**.
- Select Your Company and click on '**Report Configurations**'. Click on '**Edit**' to Edit the Template.

## Set the Custom Footer

- To set Custom Footer Enable '**Custom Footer**'.
- Add the required Footer in Report '**Footer Box**'.
- Select the format of paper from '**Paper Format**' as required.



The screenshot displays the 'Configuration' window of the application. It is divided into three main sections: 'Custom Footer', 'Report Footer', and 'Paper format'. The 'Custom Footer' section has a checked checkbox. The 'Report Footer' section contains a text box with the following content: 'Phone: +1 555 123 8069 | Email: info@yourcompany.example.com | Website: http://www.example.com'. The 'Paper format' section features a dropdown menu currently set to 'US Letter' and a small icon to its right.

| Configuration |   |
|---------------|---|
| Custom Footer | <input checked="" type="checkbox"/>   |
| Report Footer | Phone: +1 555 123 8069   Email: info@yourcompany.example.com  <br>Website: http://www.example.com   |
| Paper format  | US Letter   |

### Set Default Report Settings

- To set the Default Report Settings navigate to '**Default Report Settings**' section manage following options:
  - **Report Logo:** Set the Report Logo for the Invoices.
  - **Default Invoice Template:** Set the Invoice Template from following 6 Options:
    - Contemporary
    - Elegant
    - Creative
    - Professional
    - Advanced
    - Exclusive

- **Template Base Color:** Set the Template Base Color for the Invoices.
- **Template Text Color:** Set the Template Text Color for the Invoices.
- **General Text Color:** Set the General Text Color for the Invoices.
- **Company Address Color:** Set the Company Address Color for the Invoices.
- **Report Watermark Logo:** Set Watermark for the Invoices.
- **Table Odd Parity Color:** Set Table Odd Parity Color for the Invoices.
- **Table Even Parity Color:** Set Table Even Parity Color for the Invoices.
- **Customer Name Color:** Set the Customer Name Color for the Invoice.

- **Customer Address Color:** Set the Customer Address Color for the Invoices.
- **Display Product Description:** Enable 'Display Product Description' to display product description on invoice.
- **Display Customer Name in Bold:** Enable 'Display Customer Name in Bold' to display Customer Name in Bold.
- **Display Company Name in Bold:** Enable 'Display Company Name in Bold' to display Company Name in Bold.
- Admin can choose any color for the editable text fields with the color picker.

The screenshot shows the 'Default Report Settings' configuration page. The left sidebar lists settings: Report Logo, Invoice Template (Contemporary), Template Base Color (#a5e4e8), Template Text Color (#0d6909), General Text Color (with a color picker), Company Name Color, Company Address Color, and Display Company Name in Bold. The main area shows settings for Report Watermark Logo, Table Odd Parity Color (#aea8a8), Table Even Parity Color (#aeb8aa), Customer Name Color (#2763a1), and Customer Address Color (#2763c1). There are also checkboxes for 'Display Product Description' and 'Display Customer Name in Bold'.

**NOTE: Watermark feature is not provided for Odoo v8.0**



### Setting Different Template for Customers

- Go to Sales -> Customers.
- Select the customer for whom you want to set template and click on **'Edit'** to set the default template for the selected customer.
- Now click on **'Report Configurations'** and choose default template for Invoices from **'Invoice Template'** dropdown list under **Invoice Template'** section.

The screenshot shows the 'Agrolait' customer profile page. At the top, there's a header with the Agrolait logo, a toggle for 'Individual' and 'Company' (with 'Company' selected), and a status 'Active'. To the right, there are summary statistics: '\$1,175.00 Invoiced' and '\$ 2 Sales'. Below the header, the customer name 'Agrolait' is displayed in a large purple box. The main form is divided into sections: 'Address' (69 rue de Namur, Street 2..., Wavre, State, 1300, Belgium), 'Phone' (+32 10 588 558), 'Mobile', 'Fax', 'Email' (agrolait@yourcompany.appjetty), and 'Language' (English). There are also 'Website' (http://www.agrolait.com) and 'Tags' (Components Buyer, Partner / IT Services). At the bottom, there are tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', 'Report Configuration', and 'Accounting'. The 'Report Configuration' tab is active, showing the 'Invoice Template' dropdown set to 'Elegant'.

Individual ☒ Company

Active

\$1,175.00 Invoiced

\$ 2 Sales

**Agrolait**

**Address**

69 rue de Namur

Street 2...

Wavre State 1300

Belgium

**Phone**

+32 10 588 558

**Mobile**

**Fax**

**Email**

agrolait@yourcompany.appjetty

**Language**

English

**Website**

http://www.agrolait.com

**Tags**

Components Buyer ✕

Partner / IT Services ✕

Tags...

Contacts & Addresses Internal Notes Sales & Purchases **Report Configuration** Accounting

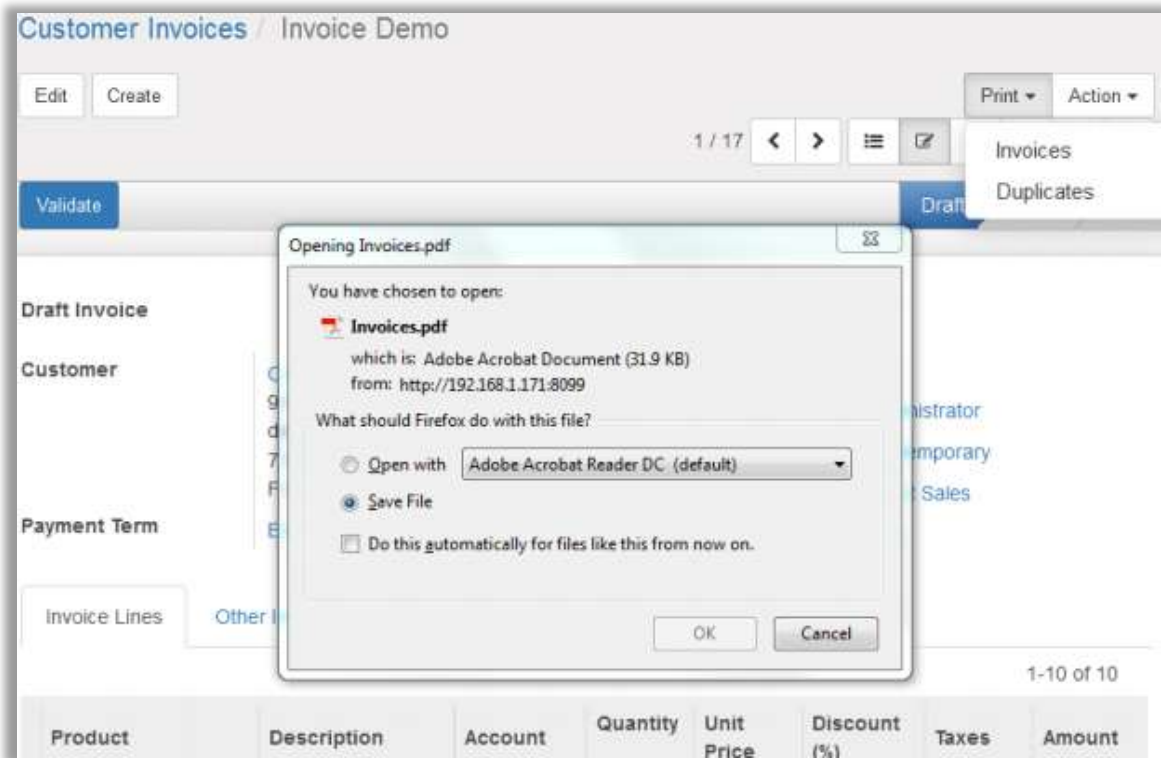
**Invoice Template**

Invoice Template

Elegant

### Printing the Invoice

- Go to **Accounting -> Customer Invoices**.
- Select any Invoice that is to be printed.
- Click on **'Print'** dropdown list and choose **'Duplicate'** option to print the invoice.



## Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-multiple-invoice-template.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to my account [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### Customization:

If you would like to customize or discuss about additional feature for **Clever Multiple Invoice Templates**, please write to [sales@appjetty.com](mailto:sales@appjetty.com)