



## About The Publisher

Cybrosys is a proven and well-established ISO Certified software development company which provides quality services all over the world. We have been providing reliable software services across different sectors of the software industry since 2008. Cybrosys has established its presence around the world within a short span of time. Now we serve our widespread customers around the globe via our offices located in London, Dubai, Bangalore, Kochi and Calicut. Our partnership with technology leaders like Microsoft, Sun, IBM, Symantec, and Odoo assist us to deliver high quality software solutions to our diverse customer base.

ERP solutions being our core area of service, we perform Odoo ERP customization, implementation, and allied services. Along with that, we are also into Source code sale, Custom software development, and Employee outsourcing. Earlier with our own proven ERP suite, we hit the market, however, later our focus turned towards more affordable open source solutions. Cybrosys has been a reliable and trusted service provider of Odoo at the beginning itself and our expertise have made Odoo even more user-friendly. Our uncompromised and user oriented services in the field of Odoo implementation and customization keep us distinguished among market players

“Never compromise on your needs, when we can assist you”

## **CEO's Message**

*"Hard work always pays dividend, sooner or later"*

It's been a long journey since we established Cybrosys. We have seen tides of growth and decline during the voyage. But we endured everything, and here we are, as one of the fast growing player, constantly striving to be better. It is always been the crew, their perseverance and efforts, that lead us forward. And we never gave up on our mission, in fact our mission steered our drive.

Associating with Odoo was a bold step to comply with our mission –“Develop most reliable cost effective software based on innovation and creativity”. And when we look back, what we see is the happy faces we served and the milestones we passed.

When we launch a product manual like this to assist end users, I do like to quote the second half of our mission that is, “most of all we value our existing customers and continued customer satisfaction”. In this occasion I would like to express my sincere gratitude to all the team members who worked behind this work. And I wish the work be an excellent guide to all Odoo users.

*Sainul Abideen*

*CEO, Cybrosys Technologies*

## Preface

In the beginning, it was ‘Tiny ERP’ then changed to ‘Open ERP’ and now it is ‘Odoo’, the change in name has affected Odoo in many ways, especially created a confusion among users. But every time the team has managed to rectify the issue and they were successful in it. In the new makeover, the ERP has undergone many defining changes and ‘Odoo’ is a brand new professional ERP software now. Even though there are many dedicated documents on the internet about Odoo and its functionalities, we found that a comprehensive material covering almost all important aspects of a ‘brand new ERP’ software is not anywhere. In other words, there is no one-stop reference covering the questions like, why an ERP, Why Open source, ERP, and present business environment, Why Odoo and what are its functionalities etc.

In the recent pasts, Odoo has been witnessing high customer demand from all over the world. As more users from different platforms coming into this system, service partners and community portals are also witnessing floods of queries about Odoo usage. When we analyze such queries in a broad sense, we can understand that the underlying problem is lack of a comprehensive guide. The bits of information scattered over internet is not much helpful to all users’, especially new Odoo customers. But the interesting thing is that Odoo is one of the simplest ERP solutions and it can be easily managed by any type of user.

In this book, we tried to cover all such topics a user must read in current context. This book is neither a typical user manual nor an installation and operation guide, rather a comprehensive guide which will give a user an overall outlook about Odoo ERP. After going through this book you will get an understanding of main features and functionalities of Odoo, and of course, it will give you a step by step guide to configure and use Odoo. All major modules of Odoo ERP, its workflow, main features of the modules etc. are included in the book for a better customer understanding. Each section of the book is prepared considering the ultimate business user in mind.

As an experienced service partner and community supporter, Cybrosys has made an appreciable contribution to Odoo. Our developers and resource persons are actively helping different types of users every day. The insight and confidence we got from such experiences prompted us to come with a work like this. And we have deployed our best hands to do the job. We believe this is an essential guide for any customer irrespective of their familiarity with the System. We look forward to the feedback from users, so we can improve and add more useful information to this document in upcoming versions.

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# **ERP in New Business Era**

The word ERP (Enterprise Resource Planning) and ERP software are not new to the business world. Since the advent of computer itself, different types of business management software was available. It was in late 90's, more advanced, integrated and efficient business management solutions emerged in the market called ERP solutions. In simple words, ERP refers to the systems and software packages used by organizations to manage their day-to-day business activities, like accounting, manufacturing, Sales, Purchase, Customers, and Inventory etc.

Though initially ERP usage was confined within large enterprises, today it is an inevitable factor in any business organization. Yearly, more and more business organizations are attaching ERP solutions to manage resources more effectively and they are reaping its fruit. The Classical module like Accounting, Inventory, and Manufacturing, was the primary component in earlier ERP solutions. However, the landscape is entirely different today and changing constantly. Today, an efficient ERP solution incorporate functionalities like E-Commerce, M-commerce, Data Analysis, Decision making, Cloud storage and Management, Remote Controlling etc. In other words, today's ERP is more like an intelligent decision taking system rather than a decision support system as it were. Integrated modules and cutting-edge analysis tools combined with huge possibilities of internet impart such enormous capabilities to an ERP system.

So, what are the advantages of having an efficient ERP software in your organization? It would be worth analyzing it in today's business environment.

- Increased productivity.
- Efficient management
- Integrated information
- Better analysis, Forecasting and Reporting
- Improved Security
- Mobile accessibility (Access and control your system from anywhere)
- Accurate Decision-making
- Scalability (customization meeting your changing needs)
- This list will go further if we tried to analyze each point in depth.

It is obvious from the listed points that an efficient ERP will enhance competence and productivity of any organization. So it is important to know different types of ERP solutions available in the market. There are many ERP solutions available in the market and they can be grouped into following categories for better understanding.

## **Proprietary ERP**

In simple words, proprietary ERP software means, an ERP solution developed, delivered and supported by a private company. Oracle, SAP, Microsoft Dynamics etc. are some examples of such software.

## **Open source ERP**

Open source ERP is a system whose source code is made publicly available. The open source model allows companies to access the ERP system's code and customize it using their own IT department instead of paying extra for vendor customization services and licensing, as is typically the case with closed source programs[1]. Generally software in this category is free.

Odoo, ERP Next, Dolibarr etc. are some examples of Open source ERP software.

## **Cloud based**

Traditionally, ERP and other business productivity software is located on premises, meaning your company is responsible for purchasing, housing, and maintaining the software and all related hardware. But Cloud ERP is a software that is accessed in “the Cloud” – using the Internet to access servers that are hosted remotely from your business. Nowadays more and more ERP providers (both open source and proprietary) are offering this facility to their customers.

## **Open source and Proprietary ERP- An analysis.**

There are many Open source and Proprietary ERP solutions available in the market. Having a better understanding of these two types of software is good as far as your business needs are concerned.

### **Cost**

Generally, Proprietary ERP solutions are costlier than Open source solutions. Hence it is affordable to organization irrespective of their size.

### **Dependency**

With proprietary ERP solutions, you are dependent on the service provider for all help. Whereas in Open source you are not locked with it.

### **Features**

Today, both Open source and proprietary ERP solutions are able to provide almost all advanced features

### **Customization**

Compared proprietary ERP, Open source is more customizable to individual business need.

### **Support**

Unlike in the Past, active community support and availability of more service partner are keeping open source solution on par with proprietary services.

### **Upgrades**

Upgrades and new features make an ERP competent in business environment. Both proprietary and open source solutions provide updates but we must admit that, the frequent developments in open source systems are far better than others.

# **Open Source ERP**

## **What is Open source?**

Open source, as the name indicate it is an open platform in the field of software technology. According to a widely accepted definition, open source software means a computer software with its source code made available with a license in which the copyright holder provides the rights to study, change, and distribute the software to anyone and for any purpose [2].

In historical perspective, open source software's genetics dates back to 70's when elementary software's were developed. Initially, all software products were open source in fact. Programmers shared and co-developed source codes and developers benefited from each other by it. But late with the commercialization of software products like any other commodity, software and its source code became less shared and protected by IPR. In the beginning, commercialization put a setback to open source movement, but with the advent of internet the movement again got momentum and advanced even faster. Today, open source software displays stiff competition to proprietary products with its leading presence and uncompromised performance in all arena of software solutions.

## **Open Source ERP**

Fully fledged business management software and ERP solutions were available on the market by late nineties itself. But most of them were in proprietary category. Fully fledged Open source ERP solution came into the market by 2002 and consequent years. Initially, such software were not much popular as the major proprietary players lead the industry. But later, increased online community support and inherent strength of open source technology pushed the industry forward. More and more customers attracted towards open source platform as it provided more ROI. Especially, SME sector attracted more towards this affordable service providers.

According to market research, proprietary ERP solutions still leads the market in monetary terms [4], yet Open source customer base is steadily increasing. It is obvious from the facts that, despite higher market share in monetary terms, proprietary software are facing stiff competition from more affordable open source solutions. Today, you can find all the features a proprietary ERP provides is there in open source ERP also. In fact, open source community is constantly incorporating more outstanding features to open ERPs.

Different ERP's have different set of features in their bag. Following are some essential features an ERP must have in today's business environment and you can find these features in almost all modern open ERP software.

- E-commerce module
- Cutting-edge analytical tools
- Remote control
- Cloud support
- Social media integration
- Easy customization
- Support and Upgrades

### **How open source ERP works?**

Unlike any other software, the real challenge in ERP is ensuring further support and timely upgrades for your ERP suite. This is where most of the customers are forced to choose a private player rather than an open source solution. But in today's context, open source ERP solutions rectify such problems with the help of active online community as well as paid service partners. Moreover, different versions of ERP (like Enterprise and Community in case of Odoo) make it easier for customers to ensure their future support more wisely. Cloud-based ERP software services are also making now things easier for open source ERP.

Trending open source ERP's in market basically provides following implementation options for their customers.

- **Company direct implementation, and services.**

In this case, the developer company directly gives ERP implementation and future support to customers. Usually, cloud-based ERP is provided and they will charge for it accordingly.

- **Service partners**

All open source ERP companies have authorized service partners across the globe. They provide all the assistance needed for a customer on a variable cost.

- **Free version.**

You can download and configure ERP your own. No fees and extra cost. But you can seek help from the online community for any assistance.

Apart from this, a lot of other options are also available depends on the software provider. Customers can choose an implementation plan according to their convenience.

## **Open Source ERP examples**

### **Odoo**

Odoo is an all-in-one management software that offers a range of business applications that form a complete suite of enterprise management applications targeting companies of all sizes. Odoo is an all-in-one business software including CRM, Website/e-Commerce, billing, accounting, manufacturing, warehouse- and project management, and inventory. [3]

### **Openbravo**

Openbravo is a retail-focused ERP based on a modular system. The software comes in three types. Openbravo Community edition which is free release and paid Enterprise and Professional editions. [3]

### **ERPNext**

ERPNext is an open source solution designed for small and medium businesses (SMBs). The software is a collection of apps and plugins. [3]

### **iDempiere**

iDempiere is a full-fledged ERP, with everything from invoicing to POS integration to warehouse management to forecasting. While iDempiere is open source, installing an ERP is never truly free. [3]

### **xTuple PostBooks**

xTuple makes a range of ERP and manufacturing-focused products, but the core of all these options is PostBooks. PostBooks manages the central functionality of an ERP, which is extended by xTuple's other offerings. [3]

## **Odoo as an ERP solution**

'Expand as you Grow' the tagline from Odoo conveys a lot to its customers. Started in 2005 by open source enthusiast 'Fabien Pinckaers', Odoo is now one of the leading open ERP providers across the globe. Started in the name 'Tiny ERP', and later as 'Open ERP', Odoo endured many adversaries before securing its present status. In the beginning, Odoo released everything for free. But later they have adopted a different business model in which the software and source code is still free, but customers have to pay for services provided by the Odoo service partners. The paradigm shift has brought enormous qualitative changes to Odoo. Odoo became powerful and user-friendly in consequent years and expanded its customer base, partner network, and community support [6]. And today with 2million+ customers and 730+ partner network, Odoo is one of the fastest growing open ERP solution in the world.

A bulky software with higher cost is the first thing comes to a person's mind while thinking about an ERP solution. But open source technology and new developmental methods have changed the picture altogether. Odoo is one of the simplest ERP solution available and you can witness it from the design of each module. In Odoo, each module is a separate app that can be installed to your database. That is where the word 'expand as you grow' is relevant. You just have to install the modules you needed most, and when you install a new module it will automatically integrate with your existing modules and start working.

## **Why Odoo**

### **Comprehensive yet Simple to Use**

The 5000+ modules and apps it provides make Odoo a powerful ERP. There is always a solution for your any type of need. But this bulkiness will not reduce system performance, as the user has to install needed modules only.

### **Highly updated and Regular Upgrades**

Odoo is a business solution that is designed to meet present as well as near possible business needs. Other than the classical modules like Accounting, Manufacturing, Sales etc. E-commerce, M-commerce, Business intelligence, Cloud assistance and more other modules make Odoo the need of the hour.

Another widely appreciated feature of Odoo is that it is based on a technology stack that is modern and up-to-date. These technologies continue to be developed and adapted to the latest paradigms [5].

### **Customizable and Scalable**

Since it is an Open source solution, you can customize Odoo to meet your changing needs. Either you can customize yourself or you may seek a service partner's assistance for more sophisticated customization. Odoo Apps are another feature which keeps Odoo on top. The customer can access 10000+ free and paid apps from Odoo app store to add features to their software.

### **Any Business with Less Cost**

From large enterprise to small organization, Odoo can serve any type of customer. It is simply customizable to cater any type of user needs. Similarly, the cost associated with it is affordable to any type of customer. If you need it for free, download and use it. If you need a service partner to assist then find an affordable hand from your locality.

### **Strong and Active Community**

What makes Odoo an exception to other ERP solutions is its continued strong community support. With 20000+ members and developers, Odoo community is one of the best Open ERP community in the world. You can find help on any of the issues from Odoo community portals.

### **Business Intelligence**

Odoo is not a conventional decision support system, rather it is more decision-making system. Various reports and analysis available in Odoo make your decision making simpler. And nowadays more AI apps and plugins are being contributed to Odoo App store, which in turn enhance the overall system capabilities.

## Introduction.

Free as in "freedom", not free as in "free services", this is the tagline presented by 'Fabien Pinckaers' (CEO, Odoo S.A) while adopting the new business model for open source ERP, Odoo. Thanks to such a visionary thought, without it, the idea of a game-changing open source ERP wouldn't have become a reality. Freedom to see, freedom to change, freedom to use, everything based on user's needs. That is the freedom offered by Odoo. You can acquire, customize and use an excellent ERP solution for free. Even a normal non-technical person can perform such operations. But we need a starting point, where to start and how to configure, how to customize up to your requirement etc. must be answered first.

The following sections of this book will make you intimate with the system. In this introductory part, you will get to know about different ways to acquire Odoo. The first module of this book will explain how to set up the database of your ERP and manage it. It will also provide guidelines to set up different users with different access rights to manage the system. In the next section onwards the book will guide you to each module of Odoo in a detailed way. There you can find basic configurations, general operations and other important and advanced option to run each module.

Basically, there are two versions of Odoo ERP available namely Community version and Enterprise version. While community version provides almost all the necessary features, later can provide more advanced options. You may acquire Odoo ERP solution through any of the following ways.

- **Online version** – In this case you get online access to Odoo ERP Enterprise version. And all your data and operations are managed online. Here Odoo Company directly gives you all the services needed.
- **Direct download** - You can download, customize and start using Odoo (Community version) your own. And you can access services and other helps from community portals. You may get the help of a service partner if needed.
- **Via Service Partner (Enterprise or Community version)** – you can seek the help of an authorized service partner to implement and customize Odoo for you. However, the service partner may charge you according to service. You may choose either Enterprise or Community version depends on your need.

Once you have acquired Odoo through any of these ways, the next step is creating your database (The detailed steps are described in this book). Actually, all the modules are independently organized in Odoo. In order to access a module, you must install that particular App from Odoo apps. But once it is installed, it automatically integrates with the whole system.

## **Core Modules of Odoo**

### **Accounting and Finance**

Simple yet powerful, Odoo Accounting module can be best described in these two words. You can process your transactions quickly using Odoo. Odoo's accounting is connected with all other apps of Odoo like Sale, Purchase, inventory and Human resource. This makes working with Odoo more simple and quick. You can create a customer invoice by less than two clicks from a Sale order. (Check Sales for more details). Odoo will fill all the necessary information required for invoice automatically. To enable accounting features in your Odoo ERP you have to install Accounting and finance App from Odoo.

### **Customer Relationship Management**

Integrated with Sales, Purchase and other modules, Odoo CRM effectively manages customer relation operations for you. Actually, Odoo CRM is a combination of about 8 Apps and plugins. View CRM module for a detailed explanation.

### **Purchase**

Just like the sales, it is really easy to manage our purchase related operations using Odoo. We can generate quotations, convert them to purchase order and generate bills in simple steps. Illustrated reports generated by this module makes analysis even simpler. After installing the purchase management module from the apps list, we can see the menu item 'Purchases' in our Odoo ERP.

### **Warehouse Management**

Track all the movements of products more effectively, generate automatic sales order and manage scraps in easy steps and lot more other features. Install the module 'Inventory' to enable warehouse management.

### **Manufacturing**

For any manufacturing company, it is important to track products and every manufacturing orders efficiently. The Manufacturing Module in Odoo help you to handle the complexity of Production, Manage Bill of Materials, Plan Manufacturing Orders, and Track Work Orders etc. Manufacturing module is one of the basic application in Odoo. After a successful installation of Odoo, we can find the Manufacturing app in apps. Since the manufacturing is highly integrated with Inventory Management, you can keep your inventory automatically updated with each manufacturing process.

## **Human Resource**

For an efficient HR management using Odoo, you have to install following apps from Odoo. That is, Timesheet, Employee Directory, Leave Management, Recruitment Process, Expense Tracker, and Attendants. One of the useful features of Odoo HRM module is the automation of recruitment process with the help of the website.

## **Point of Sale Management**

The Simple and user friendly interface of Odoo Point of sales module let the user to configure and complete his all POS needs with hassle free steps. You can install POS app from Odoo to enable this module. Like other modules, POS is also integrated with Inventory, Accounting and CRM modules thus providing live updating and efficient management.

## **Website and E-commerce**

Odoo is always ahead of user needs. Website and E-commerce is such a novel feature. You can make your own website and carry out E-commerce activities without depending on other third-party apps. Website also plays a big role in many other modules.

## **Project Management**

Project Management is a collection of guided process to achieve a specified target. That may include initiation, planning, assignation, controlling, analysis and closing. Project management app is one of the powerful tools in Odoo. Where we can run all projects with user-defined workflow. To enable project management functionalities in Odoo, you need to install Odoo Project App.

The following pages will give you an exact idea about Odoo and its modules.

## Basic Configurations of Odoo

You can acquire Odoo through any of the methods mentioned in the previous chapter (i.e. Introduction). The very next step is setting up your database. Whether you are using online version or onsite version, you must create your database first. It is in this Database all your data and operations are performed. You can create multiple databases if needed, and you can have different administrators for each of them. An administrator account (super user) will be created automatically when you create your first DB. This Administrator account is very important as he enjoys complete control over ERP system. Odoo provides an extra level security called Master Password to protect your database from unauthorized modifying. You may have multiple databases and administrators but only the administrator with Master Password can modify the entire database. Once you have configured a database, Odoo provides the option to delete, Backup, Restore the databases. Backup and Restore option is a useful feature provided by Odoo to protect your database.

After setting up your database, it is time to install the modules you needed from Odoo Apps. In upcoming chapters, you can find the detailed description about the apps you need to install to run a module.

In the next step, you have to create the system users. System users mean all the persons who can login and access different sections of ERP. For example, accountant, project manager, section head, department head, team lead etc. This depends upon the business and organizational hierarchy you run. Obviously, you can set access restrictions on these users. The menu and settings visible to each user are based on the access right he possesses. For example, the menu to create a manufacturing order will be visible to a user with 'Manager' privileges in manufacturing. In each module, Odoo by default provides at least two types of users with different access permission. However, the administrator can grant custom permission to these users if needed. In fact, admin can create a user with custom privileges. Another useful feature you can find in Odoo is the 'Group'. You can add multiple users under a Group and apply access restriction on the group. In other words, if you have a lot of users to manage, then the group is an efficient method.

Odoo has multilayer security system. At the top level, the administrator can restrict an individual user from accessing any module or application in Odoo by using Access Right mechanism in the user profile. Further down, the administrator can Impose Read, Write, Delete, Create permissions on Groups (i.e. any Department or a group of people) using Access control to fields. Record Rules is another feature to establish customized security.

# Database Management

## Create Database

When we install Odoo in our system we automatically redirected to **database creation** page. In that page, Odoo provides basic instructions for creating your database.



Odoo is up and running!  
Create a new database by filling out the form, you'll be able to install your first app in a minute.

**Database Name**  
odoo\_doc

**Email**  
admin

**Password**  
• eye icon

**Language** English      **Country** India

Load demonstration data (Check this box to evaluate Odoo)

**Create database** or restore a database

**Note:** - Tick the checkbox **Load Demonstration** data to fill your apps with sample data.

Click <Create Database> and you will be redirected to Odoo Apps. You can see the Apps from the app list, install any module according to your need.

**Note:** - You can create any number of database later from the same window.

The screenshot shows the Odoo Apps store interface. At the top, there is a search bar with the placeholder "Search..." and a magnifying glass icon. Below the search bar are buttons for "Filters", "Group By", and "Favorites". On the right, it shows "1-40 / 43" with navigation arrows and a list of installed and available apps. The main area displays a grid of 12 app cards:

- CRM**: Leads, Opportunities, Activities. Status: Installed.
- Project**: Projects, Tasks. Status: Installed.
- Inventory Management**: Inventory, Logistics, Warehousing. Status: Installed.
- Manufacturing**: Manufacturing Orders, Bill of Materials, Routings. Status: Install.
- Sales**: Quotations, Sales Orders, Invoicing. Status: Installed.
- Point of Sale**: Touchscreen Interface for Shops. Status: Install.
- Timesheets**. Status: Installed.
- Discuss**: Discussions, Mailing Lists, News. Status: Installed.
- Leave Management**: Holidays, Allocation and Leave Requests. Status: Installed.
- Invoicing**: Send Invoices and Track Payments. Status: Installed.
- Accounting and Finance**: Financial and Analytic Accounting. Status: Installed.
- Issue Tracking**: Support, Bug Tracker, Helpdesk. Status: Installed.
- Productivity**: Sticky notes, Collaborative, Memos. Status: Install.
- Website Builder**: Build Your Enterprise Website. Status: Installed.
- eCommerce**: Sell Your Products Online. Status: Installed.

## Delete Database

- Manage Database -> Delete

The screenshot shows the Odoo database management interface. At the top, there is a large "odoo" logo. Below it, a table lists four databases:

Database Name	Action Buttons
Crm_db	Backup, Duplicate, Delete
HRMS_Inventory	Backup, Duplicate, Delete
Hotel_management_10	Backup, Duplicate, Delete
autoline_test_10	Backup, Duplicate, Delete

## Backup and Restore Database

To Backup a Database

Backup Database ×

---

**Database Name**  
odoo\_doc

**Backup Format**  
zip (includes filestore) ▾

---

Backup

- **Manage Database -> Backup**
- Select the Backup format and click on <Backup>.

To Restore a Backup, Follow the steps

- **Manage Database -> Restore**

Choose the database to be restored, Give the database a new name and click on <continue.>

Restore Database ×

---

**File**  
 Choose file odoo\_doc\_20...6-56-51.zip

**Database Name**  
odoo\_test\_db

**This database might have been moved or copied.**

In order to avoid conflicts between databases, Odoo needs to know if this database was moved or copied. If you don't know, answer "This database is a copy".

This database is a copy  
 This database was moved

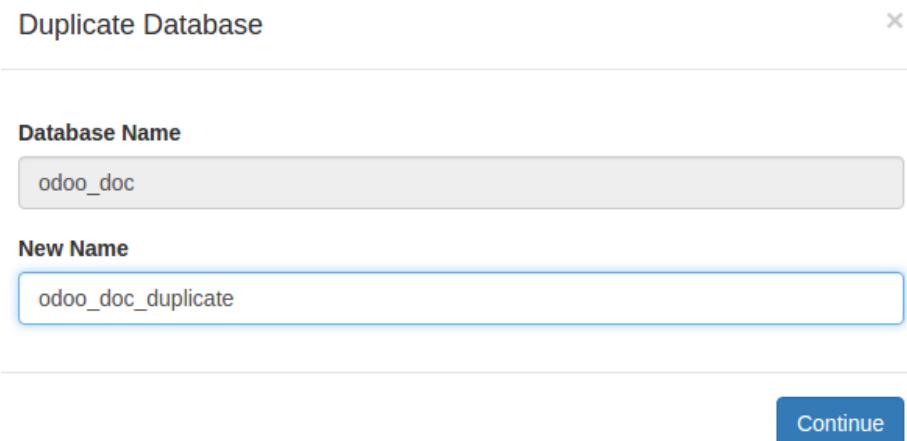
---

Continue

And after successful restoration we can see the restored database listed in the database management page.

## Duplicate Database

- **Manage Database -> Duplicate**



And After a few seconds, we can see the duplicated database in the database list.

## Master Password

**Master Password** is the key-stone element which controls entire Odoo Databases. Database creation, deletion, duplication etc. actions can't be performed without the master password. So it is advisable to create a strong master password for your Odoo system.

# USER Management

## Types of user

Basically, there are two types of user in Odoo ERP, Administrator, and normal user. **Administrator is the default user created at first** and he has complete access over Odoo system. As the administrator of your database, you are responsible for its usage. This includes the Apps you install as well as the number of users currently in use etc. **Admin can create as many as users and assign their permissions and access rights within the application.** By this method, admin can create organizational hierarchy and restrict users only to their own domain.

## Creating user

- Login to the system as administrator
- **Settings -> Users -> Create**

The screenshot shows the 'Users / New' creation form. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'Change Password' button. The main form area has a 'Name' field containing a placeholder and an 'Active' checkbox which is checked. There is also an 'Email Address' field. Below the form are four tabs: 'Access Rights', 'Oauth', 'Preferences', and 'Point of Sale'. Under 'Multi Companies', there are sections for 'Allowed Companies' (with a dropdown containing 'YourCompany') and 'Current Company' (with a dropdown also containing 'YourCompany'). Under 'Application', there are dropdowns for 'Sales' (set to 'Manager'), 'Project' (set to 'Manager'), and 'Inventory' (with a placeholder). The entire interface has a light gray background with blue highlights on buttons and selected items.

- Fill the field with user information
- Set **Access Rights** to each application for the user from dropdown
- Find more customization for the user in 'OAuth', 'Preferences', 'Point of sale' tabs.
- '**Change Password**' button can be used to set a password for the user

**Note:** - you can restrict a user from accessing a particular application by changing **Access Right** for that application from above form.

**Note:** - Admin can edit any user details from the same menu (i.e. **More->Settings->Users**) by Clicking on the user name from list.

## Delete User

- Login to the system as administrator
- **Settings -> Users**
- Select a user from list

The screenshot shows the Odoo 'Users / Demo User' screen. At the top, there are buttons for 'Edit' (highlighted in blue), 'Create', 'Print', 'Attachment(s)', and 'Action'. The status bar indicates '2 / 3' and shows 'Never Connected' and 'Confirmed' status. Below the header, there are buttons for 'Change Password' and 'Send Reset Password Instructions'. The main area displays the user profile for 'Demo User' (demo). The profile includes a photo, the name 'Demo User', the login 'demo', and a checked 'Active' checkbox. Below the profile, tabs for 'Access Rights', 'Oauth', 'Preferences', and 'Point of Sale' are visible. Under 'Multi Companies', it shows 'Allowed Companies' and 'Current Company', both set to 'YourCompany'. In the 'Application' section, it lists 'Sales' (User: Own Documents Only), 'Project' (Manager), 'Inventory' (User), and 'Manufacturing' (User).

- Action->Delete

**Note:** - Admin can perform other tasks like 'Edit user info', 'Duplicate' user etc. from the same window.

## Groups

Groups are very important security modules in Odoo. They are created to achieve **organizational hierarchy as well as impose access control to a group of users**. Admin can set access control for a group of people rather than an individual.

## Assign user to groups

- Settings > Groups

The screenshot shows the Odoo 'Settings > Groups' screen. The left sidebar has a navigation menu with 'Dashboard', 'Users', 'Groups' (which is selected and highlighted in purple), 'Companies', 'General Settings', 'Translations', 'Languages', 'Load a Translation', and 'Import / Export'. The main content area is titled 'Groups' and shows a list of 52 groups. The first group listed is 'Internal Groups'. The groups are categorized into several sections: 'Administration / Access Rights', 'Accounting & Finance / Accountant', 'Technical Settings / Addresses in Sales Orders', 'Accounting & Finance / Adviser', 'Technical Settings / Analytic Accounting', 'Technical Settings / Analytic Accounting for Purchases', 'Technical Settings / Analytic Accounting for Sales', 'Technical Settings / A warning can be set on a partner (Account)', and 'Technical Settings / A warning can be set on a partner (Stock)'. Each group entry has a checkbox next to it.

Once you know about groups, you can select groups from list of groups as shown in above figure.

The screenshot shows the Odoo application interface for managing users. At the top, there are tabs for 'Application' (selected), 'Inventory', 'Portal', 'Name' (set to 'Manager'), and 'Share Group'. Below these are tabs for 'Users' (selected), 'Inherited', 'Menus', 'Views', 'Access Rights', 'Rules', and 'Notes'. A table displays a single user record:

Name	Login	Language	Latest connection
Administrator	admin	English	07/20/2017 10:57:28

Here you can add as many as users under the Users tab so that all the security rules in that group will be applied to the user. **Access Rights** and Rules are very effective methods to implement security measures in Odoo, they are discussed in coming pages.

## External user Sign Up

What if we wish to allow an external user (like your client) to view something in your system. He can sign in to your system and view allowed areas. To enable this settings.

- ***Settings -> General Settings***

The screenshot shows the Odoo 'General Settings' configuration page. The left sidebar includes links for Discuss, Sales, Invoicing, Apps, and Settings. The main area has tabs for 'Apply' and 'Cancel'. The 'General Settings' section contains the following configuration options:

- Email:** Configure outgoing email servers, incoming email gateway, and Alias Domain (set to 0.0.0.0).
- Portal access:** Includes checkboxes for activating the customer portal, enabling password reset from Login page, and allowing external users to sign up (this checkbox is checked).
- Authentication:** Includes a checkbox for using external authentication providers (OAuth).
- Import / Export:** Includes a checkbox for allowing users to import data from CSV/XLS/XLSX/ODS files.
- Multi Company:** Includes a checkbox for managing multiple companies.
- Multi Currencies:** Includes a checkbox for allowing multi currencies.
- New users access rights:** Includes a link to edit default access rights for new users.

Under The **portal access** there is a check-box indicated **Allow external users to sign up**. Tick that checkbox and click on <Apply> button. Now you can see a signup option is enabled near login portal



Database

Email

Password

[Sign up](#)

[Manage Databases](#) | Powered by Odoo

Click on <Sign up> and you will be redirected to a new Sign Up page.



Your Email

Your Name

Password

Confirm Password

[Back to Login](#)

[Manage Databases](#) | Powered by Odoo

# Security Rules

Other than the access permission applied during the profile creation, admin can make use of following security measures to achieve high-level system security.

## Access control to fields

In Odoo, all menus and views are not viewable to all users, by default only administrator has the permission to view and control all the fields and views. Following are the major access levels an administrator can enforce on **Groups**. For example if you want to restrict some users in inventory from editing inventory details such settings can be established with this option.

### 1) perm\_read

If this is set, it means that all users that are in this group have read access on this model. If it is not set, it means that the users don't have read rights.

### 2) perm\_write

If this is set, it means that all users that are in this group have write access on this model.

### 3) perm\_create

If this is set, it means that all users that are in this group have create access on this model.

### 4) perm\_unlink

If this is set, it means that all users that are in this group have delete access on this model.

This settings can be found on following tabs

- **Settings > Groups > Access Rights**
- **Settings > Groups > Rules**

The screenshot shows the Odoo Groups interface. At the top, there are tabs for Application (Portal, Inventory), Name (Share Group, Manager), and a sidebar with tabs for Users, Inherited, Menus, Views, Access Rights, Rules, and Notes. The main area displays a table for the 'Inventory' application's 'Share Group'. The table has columns: Name, Login, Language, and Latest connection. One row is visible, showing 'Administrator' as the name, 'admin' as the login, 'English' as the language, and '07/20/2017 10:57:28' as the latest connection time. There are also three empty rows below the first one.

Name	Login	Language	Latest connection
Administrator	admin	English	07/20/2017 10:57:28

## Record Rules

This control mechanism is applied when we need more customization in access rights other than the one which are available. These are generally done by technical persons.

- **Settings > Security > Record Rules**

A record rule has:

- A model
- A set of permissions (e.g. if perm\_read is set, the rule will only be checked when reading a record)
- User groups (no group means global rule)
- A domain for filtering data (If filter matches: It is accessible, If filter does not matches: It is not accessible )

The screenshot shows the configuration interface for a Record Rule. It includes the following sections:

- General**: Fields for Name (All Leads Analysis), Object (CRM Opportunity Analysis), and Active (checked).
- Access Rights**: Options for Apply for Read (checked), Apply for Write (checked), Apply for Create (checked), and Apply for Delete (checked).
- Rule Definition (Domain Filter)**: A field containing the expression `[(1,'=',1)]`.
- Groups (no group = global)**: A section for defining user groups. It shows a table with one row: Group Name (Sales / User: All Documents) and a Global checkbox (unchecked).
- Interaction between rules**: A detailed explanation of how rules interact:
  - Global rules (non group-specific) are restrictions, and cannot be bypassed. Group-local rules grant additional permissions, but are constrained within the bounds of global ones. The first group rules restrict further than global rules, but any additional group rule will add more permissions.
  - Detailed algorithm:
    1. Global rules are combined together with a logical AND operator, and with the result of the following steps
    2. Group-specific rules are combined together with a logical OR operator
    3. If user belongs to several groups, the results from step 2 are combined with logical OR operator
  - Example: GLOBAL\_RULE\_1 AND GLOBAL\_RULE\_2 AND ( (GROUP\_A\_RULE\_1 OR GROUP\_A\_RULE\_2) OR (GROUP\_B\_RULE\_1 OR GROUP\_B\_RULE\_2) )

## **Accounting and Finance**

Simple yet powerful, Odoo Accounting module can be best described in these two words. You can process your transactions quickly using Odoo. Odoo's accounting is connected with all other apps of Odoo like Sale, Purchase, inventory and Human resource. This makes working with Odoo more simple and quick. To enable accounting features in your Odoo ERP you have to install Accounting and finance app from Odoo Apps.

There are many things which make Odoo a unique product than any other ERP Accounting modules. When we compare Odoo Accounting with other ERP suites like Microsoft Dynamics and NetSuite we can see many features which Odoo alone have. For example, Quick reconciliation, Automatic Sync, Batch Send, Third party follow-up, Payment automation, Alerts, and Expenses etc. features can be found in Odoo. But neither NetSuite nor Dynamics support all of these features but only some of them. Since all accounting transactions are associated with customers or suppliers, you get reports to perform analysis per customer/supplier such as the customer statement, revenues per customers, aged receivable/payable etc. Another exemplary option available in Odoo is its business intelligence engine which will allow you to navigate through company data in more organized manner. The graphs and diagrams plotted by BI engine is indeed a useful tool in decision making. Of course, Odoo is mobile too. You can use it to check your accounts on the go.

Following is the way Odoo deals with typical accounts and transactions.

### **Double-entry bookkeeping**

Odoo automatically creates all the journal entries for each of your accounting transactions and Odoo uses double-entry bookkeeping system i.e. all journal entries are automatically balanced.

### **Accrual and Cash Basis Methods**

Odoo supports both accrual and cash basis reporting. This allows you to report income / expense at the time transactions occur.

### **Multi-companies**

Odoo allows to manage several companies within the same database. Each company has its own chart of accounts and rules. You can get consolidation reports following your consolidation rules.

## **Multi-currencies**

Every transaction is recorded in the default currency of the company. For transactions occurring in another currency, Odoo stores both the value in the currency of the company and the value in the currency of the transaction. Odoo can generate currencies gains and losses after the reconciliation of the journal items.

## **International Standards**

Odoo accounting support more than 50 countries. The Odoo core accounting implements accounting standards that is common to all countries and customized apps are available to accommodate the specificities of individual country; like the chart of accounts, taxes, or bank interfaces.

## **Accounts Receivable & Payable**

By default, Odoo uses a single account for all account receivable entries.

## **Wide range of financial reports**

In Odoo, you can generate financial reports in real time. Odoo's reports include:

- Performance reports (such as Profit and Loss, Budget Variance)
- Position reports (such as Balance Sheet, Aged Payables, Aged Receivables)
- Cash reports (such as Bank Summary)
- Detail reports (such as Trial Balance and General Ledger)
- Management reports (such as Budgets, Executive Summary)

## **Import bank feeds automatically**

Odoo makes bank reconciliation easy by frequently importing bank statement lines from your bank directly into your Odoo account.

## **Inventory Valuation**

Odoo supports both periodic (manual) and perpetual (automated) inventory valuations.

## **Easy retained earnings**

Odoo automatically calculates your current year earnings in real time; so that no year-end journal or rollover is required. This is calculated by automatically reporting the profit and loss balance to your balance sheet report. [7]

# System Users

Basically, there are three types of users in Accounting module, who have different type of access right to the system.

The screenshot shows a user profile for 'John Doe' with the following details:

- Name: John Doe
- Email Address: johndoe@example.com
- Status: Active (indicated by a checked checkbox)

Below the profile, there are tabs for 'Access Rights' and 'Preferences'. Under 'Access Rights', there is a section titled 'Application' with the following table:

Module	Access Right
Accounting & Finance	Billing
Employees	Employee
Administration	

The 'Billing' row is highlighted with a red box.

- Billing
- Accountant
- Adviser

When we move from Billing Adviser, user will get more rights in application

- The main thing a user with only 'Billing' access right can do is create and process invoices.
- Billing user can also create new customers and vendors, Access product information, taxes, and fiscal positions.

This is all the menus available for a '**Billing**' user.



The image shows the Odoo web interface for a 'Billing' user. At the top, there is a dark header bar with two tabs: 'Discuss' and 'Accounting'. The 'Accounting' tab is highlighted with a white background and black text. Below the header is the Odoo logo, which consists of the word 'odoo' in lowercase letters, where the 'o' is purple and the rest is grey. The main content area is a light grey sidebar containing a hierarchical menu. The menu items are as follows:

- Sales**
  - Customer Invoices
  - Customers
  - Sellable Products
- Purchases**
  - Vendor Bills
  - Vendors
- Reports**
  - Business Intelligence
- Configuration**
  - Accounting
    - Taxes
    - Fiscal Positions
  - Payments
    - Payment Acquirers
    - Payment Transactions

At the bottom of the sidebar, there is a footer bar with the text 'Powered by Odoo'.

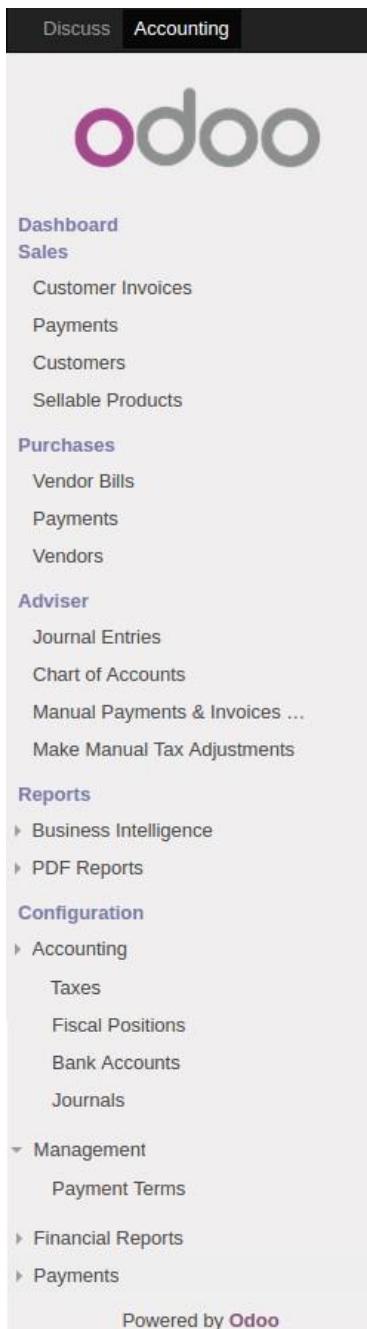
Next level of access right is '**Accountant**'. Along with the rights available for billing user, Accounts has more other rights.

- **Accountant** have access to dashboard of accounting
- **Accountant** can record payments from customers and vendors.
- He can generate all the PDF reports available.
- Also **Accountant** can configure financial reports.



The screenshot shows the Odoo Accounting dashboard. At the top, there are two tabs: 'Discuss' and 'Accounting'. The 'Accounting' tab is active. Below the tabs, the Odoo logo is displayed. The main menu is organized into sections: 'Dashboard', 'Sales' (with sub-options like Customer Invoices, Payments, Customers, and Sellable Products), 'Purchases' (with sub-options like Vendor Bills, Payments, and Vendors), 'Reports' (with sub-options like Business Intelligence, PDF Reports, Sale/Purchase Journal, Partner Ledger, General Ledger, Trial Balance, Balance Sheet, Profit and Loss, Aged Partner Balance, and Financial Report), and 'Configuration' (with sub-options like Accounting, Financial Reports, Account Reports, Account Reports Hiera..., and Payments). At the bottom of the page, it says 'Powered by Odoo'.

- **Advisor** level user have more rights than any other users in Odoo accounting.



In addition to all the rights **Accountant** have,

- **Advisor** can create products and services, they can create journal entries, Manage chart of accounts, manual payments and invoice reconciliation, and advisor can make manual tax adjustment.
- **Advisor** level user can create new journals and new payment terms in Odoo.

## Basic Configurations

First, we have to set up general configurations of the Accounting system. You can find the basic and important configuration below.

The screenshot shows the 'Chart of Accounts' configuration page. On the left, there's a sidebar with 'Chart of Account' and a link to 'Configure your company data'. The main area displays 'Indian Chart of Accounts - Standard'.

### Accounting>Configuration>Settings-> Chart of Accounts

Here we have selected the Indian chart of account. This is a Chart of account that comes along with Odoo. Odoo will automatically select Chart of account related to the country you selected while creating a database.

There is more than 50 chart of accounts comes with Odoo. You can choose as per your locality and need.

The screenshot shows the 'Fiscal Year' configuration page. It includes fields for 'Fiscal Year Last Day' (set to December 31), 'Lock Entries' (with dropdowns for 'Lock Date for Non-Advisers' and 'Lock Date').

### Accounting>Configuration>Settings-> fiscal Year

In this section we can set-up our financial year (Fiscal Year) related controls.

- From Odoo version 9 onwards, Odoo removed financial closing. But we can configure financial year last day

**Lock Entries** are to prevent editing accounting entries

**Lock Date** for Non-Advisers means a Non-Adviser level user cannot edit an accounting entry created on this date and prior. Usually, we use this for closing a period inside an open financial year.

**Lock Date** means, not even advisor level user can edit accounting entries created on or prior to this date.

So the benefit of this approach is we don't have to close financial year to get clean Profit & Loss and Balance Sheet report. Reports will be always up-to-date without closing and generating opening entries. It makes Odoo's reporting much easier and powerful.

#### Accounting>Configuration>Settings-> Accounting and Finance

**Accounting & Finance**

<b>Options</b>	Default company currency <b>INR</b>
<b>Features</b>	<input type="checkbox"/> Get dynamic accounting reports <b>Enterprise</b> <a href="#">More Info</a> <input type="checkbox"/> Analytic accounting <input type="checkbox"/> Assets management <input type="checkbox"/> Revenue Recognition <b>Enterprise</b> <input type="checkbox"/> Budget management <input type="checkbox"/> Allow Tax Cash Basis

This section is very important.

This is where we are configuring what are the features we need in our Odoo accounting system. First thing is **Default Company Currency**.

- You can change the currency rate by clicking this button. It will open a window like this

Open: Default company currency

<b>View Rates</b>	Active
Currency <b>INR</b>	Current Rate <b>1.000000</b>
<b>Price Accuracy</b>	
Rounding Factor <b>0.010000</b>	Display
Decimal places <b>2</b>	Symbol <b>₹</b>
	Symbol Position <b>After Amount</b>
<b>Save</b>	<b>Discard</b>

By clicking on '**View Rates**' button at the top, you'll see a list view of currency rates.

New / Currency Rates		Search...		
Create	Import	Filters ▾	Group By ▾	Favorites ▾
<input type="checkbox"/> Date		Rate		

Add the current rate of your currency here by clicking <Create> button.

Date	06/28/2017 05:30:00	Currency	INR
Rate	0.000000		

**Note:** All the options those are labeled **Enterprise** as are available only in enterprise version of Odoo. We will not discuss those things here.

### Accounting>Configuration>Settings

- **Analytic accounting.**

This feature can be used for many purposes like Manage Cost center concept, Invoice time spend on a task, Performance Analysis. This feature is also using for the budget management.

We will discuss these matters later

- **Asset management.**

Choosing this feature let you purchase your asset and manage the depreciation of those assets

- **Budget management.**

- **Allow Tax Cash Basis.**

Odoo supports both accrual and cash basis approach. This option allows your system to generate report in cash basis.

Accounting>Configuration>Settings>Multi Currencies

Multi Currencies	
Configuration	<input type="checkbox"/> Allow multi currencies
Configuration	<input checked="" type="checkbox"/> Allow multi currencies
Rate Difference Journal	Exchange Difference (INR) <input type="button" value=""/>

Enabling this option allows handling multiple currencies in Odoo. System will give a new option to select **Rate Difference Journal** when you **check** this checkbox.

If we receive payment against an invoice after a month of invoice creation, the exchange rate most probably changed. This **Rate Difference Journal** is used to create journal entry of loss or profit caused by the difference of currency exchange rate.

Accounting>Configuration>Settings>Invoicing and Payment

Invoicing & Payments	
Customer	<input type="checkbox"/> Allow pro-forma invoices <input type="checkbox"/> Enable payment followup management <small>Enterprise</small> More Info <input type="checkbox"/> Use batch deposit <small>Enterprise</small> More Info
Warning	<input checked="" type="radio"/> All the partners can be used in invoices <input type="radio"/> An informative or blocking warning can be set on a partner
Taxes	Default Sale Tax <small>(standard)</small> <input type="button" value=""/> Default Purchase Tax <small>(standard)</small> <input type="button" value=""/>
Payments	Configure payment acquiring methods

Under this section, if you check **Allow pro-forma** invoices, it will let you set your invoices into a state called '*Pro-forma*'.

If you have to set up any restriction or a warning message for any partner while you create an invoice for him, select **An informative or blocking warning can be set on a partner** option under warning.

The tax selected as **Default Sale Tax** and **Default Purchase Tax** will be assigned as Customer Tax and Vendor Tax of a Product/Service When you create a new one.

**Configure payment acquiring methods** Button will redirect you to the list of all Payment acquires available in Odoo. You can install the payment acquirer from that list and you can also configure them.

Use Anglo-Saxon Accounting *	<input type="checkbox"/>
Bank Accounts Prefix *	1002
Cash Accounts Prefix *	1001
# of Digits *	6
Tax calculation rounding method *	Round per Line

Enabling **Use Anglo-Saxon Accounting** will change your system's behavior into Anglo-Saxon. By default, Odoo uses continental accounting.

**Bank account prefix** and **Cash account prefix** are used to generate codes for bank and cash accounts. And **# of Digits** represents the number of digits in account code.

You have two options in **Tax calculation rounding method**

- Round per Line  
Tax amount will be rounded in each invoice line.
- Round Globally  
Rounding occurs only on total tax amount.

<b>Overdue Payments</b>	
Overdue Payments Message *	<p>Thank you in advance for your cooperation. Best Regards,</p>
(*) This configuration is related to the company you're logged into.	

**Overdue payments Message** is used on overdue report of partners. So that you can generate the report and sent it to your customer/supplier without making any modification.

Let's move to the other parts of configuration.

## Configure Customer/Supplier

How to configure a customer and other related things are covered under CRM module, however Accounting related fields is just mentioning here.

Contacts & Addresses	Internal Notes	Sales & Purchases	Accounting
<b>Sale</b>			
Customer Payment Terms	15 Days	<b>Purchase</b>	
Total Receivable	0.00₹	Vendor Payment Terms	
Degree of trust you have in this debtor	Normal Debtor	Total Payable	0.00₹
<b>Fiscal Information</b>			
Fiscal Position	Fisc Pos Hassan	<b>Accounting Entries</b>	
		Account Receivable	100400 Debtors
		Account Payable	112110 Creditors

As we see in the picture, we can select **Customer Payment Term** and **Vendor Payment Term** for this client. **Total Receivable** and **Total Payable** are only visible in developer mode.

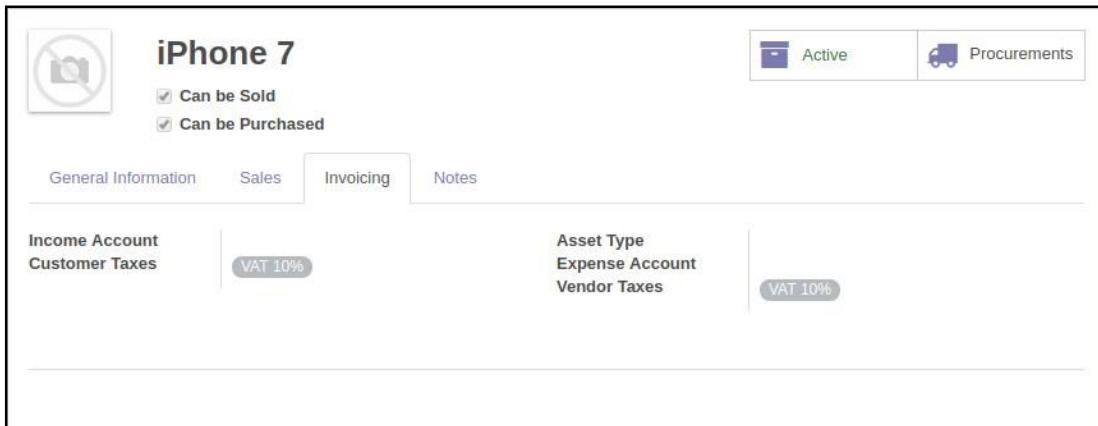
We can select the **Degree of trust you have** with this partner and also **Fiscal Position**.

**Account Receivable** and **Account Payable** will have a default value. But you can change if you want.

## Configure Products

Under the **Invoicing** tab of product form, we have

- Income Account
- Expense Account
- Customer Taxes
- Vendor Taxes



## Add New Account

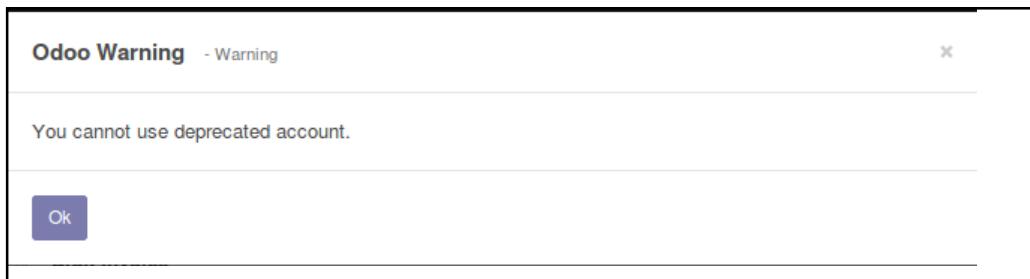
While we install Odoo, we had the option to choose our country. Using that data Odoo will install that country specific COA(Chart of Accounts). If you need more accounts in COA. You can create that from '**Chart of accounts**' menu.

### Accounting -> Advisor -> Chart of Accounts

How account type affects your reports?	
Profit & Loss	Balance Sheet
Income	Current Assets
Minus Cost of Revenue	Receivable Accounts
<b>GROSS PROFIT</b>	Prepayments
Plus Other Income	Plus Bank
Minus Expenses	Plus Fixed Assets
Expenses	Plus Non-Current Assets
Depreciation	<b>TOTAL ASSETS</b>
<b>NET PROFIT</b>	Minus Current Liabilities
	Minus Credit Card Accounts
	Minus Payable Accounts
	Minus Non-Current Liabilities
	<b>NET ASSETS</b>
	Equity
	Plus Net Profit
	<b>TOTAL EQUITY</b>

- We should be careful while selecting the **Type** of accounts. You can use the details provided on the right side of the window to select correct type.
- If we select any tax as **Default Tax** on an account, and we don't have any tax mentioned on product, then system will select this tax by default on invoices.

- We have to check the **Allow reconciliation** option. This account is used for Invoice and payment matching and reconciliation.
- If we mark an account as **Deprecated**, we cannot use that account anymore. We will get a warning message like this.



If you select an **Account Currency**, the system will force all moves for this account must have same currency.

## Configure Taxes

In Odoo we can create different type of taxes. To create a new tax or list all the taxes in your system,

**Accounting > Configuration > Accounting > Taxes**

This screenshot shows the "Taxes" configuration screen in Odoo. It includes fields for Tax Name (with a placeholder), Tax Scope (set to Sales), Tax Computation (set to Percentage of Price), Amount (set to 0.0000%), Tax Account (dropdown), and Tax Account on Refunds (dropdown). There are also tabs for "Definition" and "Advanced Options".

The screenshot shows the 'Tax' configuration screen in Odoo. At the top, there are two main fields: 'Tax Name' (empty) and 'Tax Scope' (set to 'Sales'). Below these are two tabs: 'Definition' (selected) and 'Advanced Options'. Under 'Definition', there are several fields: 'Label on Invoices' (empty), 'Tax Group' (set to 'Taxes'), 'Tags' (empty), and 'Include in Analytic Cost' (unchecked). To the right of these are three checkboxes: 'Included in Price' (unchecked), 'Affect Base of Subsequent Taxes' (unchecked), and 'Tax adjustment' (unchecked).

In the above picture you can see the mandatory fields for a tax.

- **Tax Name**

Name of the tax

- **Tax Scope**

Where to use this tax. If you select '**None**', you can only use this tax with other tax group.

- **Tax computation**

Odoo have four different types of tax computation

- Group of taxes
- Fixed
- Percentage of price
- Percentage of price tax included

### Some other options are

- **Tax account**

The account, that will be used in the invoice tax lines. Later journal entries are created using this account. If we leave it empty, then Odoo will take the default debit/credit account of Journal.

- **Tax account on refunds.**

The account used in case of refund entry.

- **Label on Invoices**

This can be used on the invoice report to represent this tax. We can add custom tags to create custom reports.

- **Include in analytic cost**

If we set this option, then the amount computed by this tax will assign to the same analytic account mentioned the invoice line.

- **Included in price**

Set this option if this tax is included in the unit price of the product/service.

- **Affect base of subsequent taxes**

If you set this option, Base amount of subsequent taxes will be sum of current base amount and tax amount of this tax.

- **Tax adjustment**

Set this option if you want this tax to be used in tax adjustment wizard.

- **Group of taxes**

This option lets us configure the tax as collection of many child taxes. Odoo will make visible the table to select the child taxes when you select this option as tax computation method.

Tax Computation		
Group of Taxes		
Tax Name	Tax Computation	Amount
Add an item		

## Configure Fiscal Positions

Odoo can handle Multi Company and multi-currency concepts. Those who are dealing with us, i.e. Customers and Suppliers, may be operating from another country or states. So the laws and regulations will be different for them. Fiscal position comes in handy in this case. **We can map taxes and accounts using fiscal position.**

Fiscal Position

Active

Tax Mapping  Account Mapping

Account on Product	Account to Use Instead
Add an item	

Legal Notes...

### Accounting > Configuration > Accounting > Fiscal Position

Tax mapping is another useful option to configure taxes.

For example:

Product Name  
**iPhone 7**

Can be Sold  
 Can be Purchased

General Information Sales Invoicing Notes

Income Account 200110 Local Sales	Asset Type
Customer Taxes VAT 10%	Expense Account
	Vendor Taxes VAT 10%

Here this product's vendor tax is configured as VAT 10%. What if I cannot purchase this product from some vendors with this tax rate (assume the tax rate is more than 10%, let's take it as 12%). In this case we can use tax mapping of fiscal position

Tax Mapping	Account Mapping
Tax on Product	Tax to Apply
VAT 10%	VAT 12% 
<a href="#">Add an item</a>	

Let's specify this fiscal position on partner master.



**Hassan Benha**

Active
0.00  Invoiced
0 Analytic Acc...

Address  
Website  
Tags

Job Position  
Phone  
Mobile  
Fax  
Email  
Title  
Language

benna@exmplae.com  
English

[Contacts & Addresses](#)
[Internal Notes](#)
[Sales & Purchases](#)
Accounting

**Sale**  
Customer Payment  
Terms  
Degree of trust you have in this debtor

**Purchase**  
Vendor Payment  
Terms

**Fiscal Information**  
Fiscal Position Fisc Pos Hassan

**Accounting Entries**  
Account Receivable 100400 Debtors  
Account Payable 112110 Creditors

- Same we can do with accounts.

Tax Mapping	Account Mapping
Account on Product	Account to Use Instead
200110 Local Sales	200120 Retail Sales 
<a href="#">Add an item</a>	

# Configure Bank Accounts

Accounting > Configuration > Accounting > Bank Accounts.

Here you can see the list of all the bank accounts configured in this system. To configure a new one click on the <Create> button. It will open a form to fill the details needed.

The screenshot shows a single row of account configuration fields. At the top is a text input field for 'Account Number'. Below it are sections for 'Bank' (with a dropdown menu), 'Debit Methods' (checkboxes for 'Manual' and 'Electronic'), 'Show in Invoices Footer Currency' (checkbox checked, with a dropdown menu), and 'Payment Methods' (checkbox checked for 'Manual').

**Show in Invoice Footer**, if we enable this feature, this account details will be displayed on Invoices and Sale orders.

**Debit method** is the method of collecting money and **Payment method** is the method for sending money

Different modules provides different methods, select according to the need.

**Create>Select** the bank from list of banks

The screenshot shows the 'Create: Bank' form. It includes fields for 'Name' (text input), 'Address' (with 'Street...', 'Street 2...', 'City', 'State', 'ZIP', and 'Country' inputs), 'Bank Identifier Code' (text input), 'Communication' (with 'Phone', 'Fax', 'Email', and 'Active' checkboxes), and buttons for 'Save' and 'Discard' at the bottom.

# Configure Journals

Accounting > Configuration > Accounting > Journals.

The screenshot shows the 'Journal' configuration screen in Odoo. It includes fields for 'Journal Name' (with a placeholder), 'Type' (dropdown menu), 'Short Code' (text input), 'Entry Sequence' (text input), and 'Default Debit Account', 'Default Credit Account', and 'Currency' (each with a dropdown menu). There are also tabs for 'Journal Entries' and 'Advanced Settings'.

Mandatory fields are

- **Name**
- **Type**

There are five types of journals in Odoo.

- Sale: Using for customer invoice journal
- Purchase
- Cash
- Bank
- General

- **Short Code:**

Odoo will create a sequence number for each journal we create. Journal entries of this journal uses this short code as the prefix of generating sequence.

There are some other fields

- **Default Debit Account:**

It is the default account for debit amount.

- **Default Credit Account:**

It is the default account for credit amount.

- **Currency**

We can specify the currency used to enter statements

here. Some additional options are available under '**Advanced Settings**'

The screenshot shows the 'Journal Entries' tab selected in the top navigation bar. Below it, there are two main sections: 'Control-Access' and 'Miscellaneous'. In the 'Control-Access' section, there is a note: 'Keep empty for no control'. Under 'Account Types Allowed', there is a dropdown menu. Under 'Accounts Allowed', there is another dropdown menu. In the 'Miscellaneous' section, there is a checkbox labeled 'Show journal on dashboard' which is checked.

Under Control-Access area, we can set some control on this journal. But these are only visible in Developer Mode

- **Account Types Allowed:**

If we mention any accounts here, this journal can only create entries to that type of accounts

- **Accounts Allowed:**

Just like types, if we mention accounts here, Journal can't use accounts other than that.

- **Show Journal on dashboard:**

Checking this option will add this journal details in to dashboard as a tile

## Configure Payment Terms

We may have to use different payment terms like, immediate payment, 30% advance and balance after one month, etc. in different situations. We can manage this with Odoo's payment terms

Payment Terms	15 Days	Active	<input checked="" type="checkbox"/>
Description on the Invoice			
Payment term: 15 Days			
<b>Terms</b>			
The last line's computation type should be "Balance" to ensure that the whole amount will be allocated.			
Due Type	Value	Number of Days	
+ Balance	0.000000	15 Day(s) after the invoice date	
Add an item			

Payment term have different due types.

- Balance
- Percentage
- Fixed amount

Also different due date computation parameters

- No of day(s) after the invoice date
- No of day(s) after the end of invoice month
- Last day of following month
- Last day of the current month

We can use the combination of these to create a new payment term.

#### For example:-

Payment term: 30% Immediate and balance at the end of the current month. In this case, we have to create a payment term with two of the above due types

Payment Terms	30% Immediate and balance at month end	Active	<input checked="" type="checkbox"/>
Description on the Invoice			
30% Immediate and balance at the end of the current month			
<b>Terms</b>			
The last line's computation type should be "Balance" to ensure that the whole amount will be allocated.			
Due Type	Value	Number of Days	
+ Percent	30.000000	0 Day(s) after the invoice date	
+ Balance	0.000000	0 Last day of current month	
Add an item			

As you can see in the above picture, we have added 'Percentage' and 'Balance' lines under terms.

In percentage,

Open: Terms

Term Type		Due Date Computation	
Type	<input type="radio"/> Balance <input checked="" type="radio"/> Percent <input type="radio"/> Fixed Amount	Number of Days	<input checked="" type="radio"/> Day(s) after the invoice date <input type="radio"/> Day(s) after the end of the invoice month (Net EOM) <input type="radio"/> Last day of following month <input type="radio"/> Last day of current month
Value	<input type="text" value="30.000000"/> %	0	days

Save Discard

We have to select '0 Day(s) after the invoice date' and put the value as 30.0

In balance,

We choose the 'Last day of current month'.

Open: Terms

Term Type		Due Date Computation	
Type	<input checked="" type="radio"/> Balance <input type="radio"/> Percent <input type="radio"/> Fixed Amount	Number of Days	<input checked="" type="radio"/> Day(s) after the invoice date <input type="radio"/> Day(s) after the end of the invoice month (Net EOM) <input type="radio"/> Last day of following month <input checked="" type="radio"/> Last day of current month

Save Discard

# Accounting Dashboard

Odoo have a nice and simple dashboard. You will get status of your accounts from the dashboard itself.

You can also go to many other parts of your accounting app from this dashboard.

The screenshot shows the Odoo Accounting Dashboard with the following sections:

- Customer Invoices**: Sale. Status: 0 Invoices to validate... 0.00 ₹ and 0 Awaiting payment... 0.00 ₹. Actions: New Invoice, More.
- Vendor Bills**: Purchase. Status: 0 Draft bills 0.00 ₹ and 0 Payments to do 0.00 ₹. Actions: New Bill, More.
- Bank**: Bank. Status: Balance in GL 0.00 ₹. Actions: New Statement, Import Statement, More.
- Cash**: Cash. Status: Balance in GL 0.00 ₹. Actions: New Transactions, More.

Timeline bars at the bottom indicate dates from 15 Jun to 5 Jul for the Bank section, and 25 Jun to 30 Jun for the Cash section.

You can create new customer invoices, vendor bills, new Bank statements, and new cash transactions from this dashboard.

This is a zoomed-in view of the Customer Invoices section of the dashboard:

- Customer Invoices**: Sale. Status: 0 Invoices to validate... 0.00 ₹ and 0 Awaiting payment... 0.00 ₹. Actions: New Invoice, More.
- Timeline bar at the bottom indicates dates from Past to Future.

When you click on 'More', you'll see more related options.

**Customer Invoices**  
Sale

**More ▾**

<b>View</b>	<b>New</b>	<b>Reports</b>
Invoices Refunds Payments Matching	Invoice Refund	Invoices Analysis
★ Favorite		Settings

There is a lot of features accessible from Dashboard. You can go to the list of different records, create new records, you can do payments matching from dashboard itself.

**Accounting Dashboard**

Favorites  Search...

1-4 / 4

<b>Customer Invoices</b> Sale	<b>Vendor Bills</b> Purchase
<b>View</b> Invoices Refunds Payments Matching	<b>View</b> Bills Refunds Payments Matching
★ Favorite	★ Favorite

<b>Bank</b> Bank	<b>Cash</b> Cash
<b>View</b> Bank Statements Search Operations	<b>View</b> Cash Statements Search Operations
Transaction Import Statement Send Money Receive Money Internal Transfer	Transaction Send Money Receive Money Internal Transfer
★ Favorite	★ Favorite

# Creating and Processing an Invoice

Accounting> Sales> Customer Invoice> Create

The screenshot shows the Odoo Customer Invoice creation interface in 'Draft Invoice' mode. The top section includes fields for Customer (Hassan Benna), Payment Terms (15 Days), Invoice Date, Salesperson (Administrator), and Currency (INR). Below this is a table for 'Invoice Lines' with columns: Product, Description, Account, Quantity, Unit Price, Discount (%), Taxes, and Amount. A single row is present, detailing an iPhone 7 purchase from account 200110 Local Sale at 1.000 units and 1,000.00 unit price, resulting in an untaxed amount of 1,000.00 and a total tax of 120.00, totaling 1,120.00. At the bottom, there is a 'Terms and conditions...' text area.

Product	Description	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhon	iPhone 7	200110 Local Sale	1.000	1,000.00	0.00	VAT 12% X	1,000.00 ₹

Untaxed Amount : 1,000.00 ₹  
Tax : 120.00 ₹  
Total : 1,120.00 ₹

Invoice in Odoo have five states.

## 1. Draft:

Draft status is used when a user is creating new or unconfirmed invoice

## 2. Pro-forma:

Pro-forma status is used when invoice don't have a sequence number. This status is not always active. We have to enable this from account settings by checking "Allow pro-forma invoices"

## 3. Open:

An invoice becomes open when the user validates the invoice. From this stage onwards invoice will have a sequence number generated by Odoo itself. Invoice will remain in this state till the user registers payment for the full amount against this invoice.

## 4. Paid:

When the invoice is fully paid.

## 5. Cancel:

Cancel status is used when user cancels an invoice.

You can see the current status of the invoice in the status bar



- Click **Add an Item** to add products to your Invoice

Product	Description	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhone	iPhone 7	200110 Local Sale	1.000	1,000.00	0.00	VAT 12%	1,000.00 ₹
Add an item							

You can see other information related to this invoices under '**Other info**' tab

Invoice Lines	Other Info	
Fiscal Position	Fisc Pos Hassan	
Journal	Customer Invoices (INR)	
Account	100400 Debtors	
Due Date	09/30/2017	
Tax Description	Tax Account	Amount
VAT 12%	112320 VAT Payable	120.00 ₹

Still our invoice is in 'Draft' state. A draft invoice won't make any difference in accounting. Accounting entries are created **only after the validation of Invoice**.

Validating an invoice will confirm the invoice. It will create a journal entry, invoice will get a sequence number, and invoice state will be in '**Open**'. Now we can make the payment against that invoice.

- You can validate an Invoice by clicking '**Validate**' button.

See the sequence code and journal entry created for this invoice in the picture below

## INV/2017/0001

Customer	Hassan Benha	Invoice Date	09/15/2017
Payment Terms	15 Days	Salesperson	Administrator

Invoice Lines

Other Info

Fiscal Position	Fisc Pos Hassan	Journal Entry	INV/2017/0001
Journal	Customer Invoices (INR)	Reference/Description	
Account	100400 Debtors		
Due Date	09/30/2017		

Tax Description	Tax Account	Amount
VAT 12%	112320 VAT Payable	120.00 ₹

This is the journal entry

## INV/2017/0001

Reconciled entries

Journal	Customer Invoices (INR)
Date	09/15/2017

Reference

Journal Items

Account	Partner	Label	Amount currency	Currency	Debit	Credit	Due date
100400 Debtors	Hassan Benha	/	0.00		1,120.00 ₹	0.00 ₹	09/30/2017
112320 VAT Payable	Hassan Benha	VAT 12%	0.00		0.00 ₹	120.00 ₹	09/15/2017
200110 Local Sales	Hassan Benha	iPhone 7	0.00		0.00 ₹	1,000.00 ₹	09/15/2017

1,120.00 1,120.00

See the debit and credit posting of the entry from this picture.



By clicking the '**Register Payment**' you can record a payment against this invoice.

The dialog box is titled 'Register Payment'. It contains the following fields:

- Payment Journal: A dropdown menu.
- Payment Date: A date picker set to 09/15/2017.
- Memo: An input field containing INV/2017/0001.
- Payment Amount: A field showing 1,120.00 with a currency symbol and INR selected.
- Buttons at the bottom: 'Validate' (blue) and 'Cancel'.

We can choose a payment journal (cash/bank/..) here and the payment amount will be the full residual amount of that invoice. If we are recording a partial payment, then we can change the value there.

- State of the invoice will become '**Paid**' once we record the full payment against it.

If the customer made any advance payment or he has any previous balance in our system, Odoo will inform you that this way

The screen shows the 'Customer Invoices / INV/2017/0001' view. The top navigation bar includes 'Edit', 'Create', 'Print', 'Action', 'Draft', 'Open', and 'Paid' buttons. A message at the top states: 'You have **outstanding payments** for this customer. You can allocate them to mark this invoice as paid.' Below this is a large input field containing the invoice number 'INV/2017/0001'.

You can assign that outstanding balance by clicking add button on that outstanding payment

## **Payments**

You can **Create/List** all the list of customer payments and vendor payments from payments menu.

Payment Type	<input type="radio"/> Send Money <input checked="" type="radio"/> Receive Money <input type="radio"/> Internal Transfer	Payment Date	09/15/2017
Customer	Hassan Benna	Memo	
Payment Journal	Cash (INR)	Payment Transaction	
Payment Amount	10000.00	INR	

## Payments have four states

- Draft
  - Posted
  - Sent
  - Reconciled

A **Draft** payment becomes **Posted** when the user clicks on validate button. Becomes **Reconciled** when it is assigned against an invoice.

# Manual Payment & Invoice Matching

**Journal Items to Reconcile**

0 / 2      Automatic reconciliation

Show  Vendors    Customers    All

Hassan Benha	Last Reconciliation : 2017-09-15	100400	Reconcile
2017-09-15	BNK1/2017/0001: Customer Payment: INV/2017/0001 : INV/2017/0001	1,120.00 ₹	
2017-09-30	INV/2017/0001	1,120.00 ₹	

John Honai	112110	Skip	
Filter...	< >		
2017-09-15	CSH1/2017/0001: Vendor Payment	5,000.00 ₹	
2017-09-16	BILL/2017/0001	8,250.00 ₹	

Tip: Hit CTRL-Enter to reconcile all the balanced items in the sheet.

This feature allows user to match the payments and invoices and reconcile them. Odoo itself will select the most matching entry. If you want to change we can do that.

**Customer Invoices**

Sale      More ▾

View	New	Reports
Invoices	Invoice	Invoices Analysis
Refunds	Refund	
<b>Payments Matching</b>		

★ Favorite      Settings

You can also access this from the dashboard.

## Manual Tax Adjustment

The screenshot shows the 'Make Manual Tax Adjustments' window. At the top left is a back arrow and the title 'Make Manual Tax Adjustments'. At the top right is a close button ('X'). Below the title is a purple header bar with the text 'Reason...'. Underneath are several input fields and dropdown menus:

- Amount:** A text input field containing '0.00'.
- Adjustment Tax:** A dropdown menu.
- Accounts:** A section with two rows.
  - Debit account:** A dropdown menu set to '100510 VAT Receivable'.
  - Credit account:** A dropdown menu set to '112320 VAT Payable'.
- Options:** A section with three rows.
  - Journal:** A dropdown menu set to 'Miscellaneous Operations (INR)'.
  - Date:** A dropdown menu set to '09/16/2017'.

At the bottom are two buttons: 'Create and post move' (highlighted in blue) and 'Cancel'.

This feature is used to manually correct the VAT declaration through a miscellaneous operation

Here you can only select the taxes marked as '**Tax Adjustment**'.

Submitting data will create a Journal entry with the details provided

## Working with Bank Statement

You can create a new bank statement and map those transactions with the general ledger transactions in Odoo.

The screenshot shows the 'Bank' module interface. At the top left is the title 'Bank' and 'Bank'. At the top right is a 'More' button with a dropdown arrow. On the left side are two buttons: 'New Statement' (highlighted in blue) and 'Import Statement'. On the right side, there are two status indicators:

- Balance in GL:** 1,120.00 ₹
- Latest Statement:** 0.00 ₹

Below these indicators is a timeline showing transaction dates: 22 Aug, 27 Aug, 1 Sep, 6 Sep, and 11 Sep. Each date has a vertical line with a small circle at the end, indicating a transaction occurred on that day.

Using the **New Statement** button we can create a new bank statement. That will open up a form like this

**Reference**

Journal	Bank (INR)	Starting Balance	0.00 ₹
Date	09/16/2017	Ending Balance	0.00 ₹

**Transactions**

Date	Label	Partner	Reference	Amount	
09/16/2017	Customer payment	Hassan Benna		1,120.00	

Add an item

Computed Balance : 1,120.00 ₹

Here you can put all the details of transactions. A bank statement have two states

- New
- Validated



We have to reconcile the statement to make it **Validated**.

**Bank Reconciliation**

0 / 1      Automatic reconciliation

Hassan Benna

100201	2017-09-16	Customer payment	1,120.00 ₹	
100201	2017-09-15	BNK1/2017/0001: CUST.IN/2017/0001 : INV/2017/0001	1,120.00 ₹	

Reconcile

Tip: Hit CTRL-Enter to reconcile all the balanced items in the sheet.

Odoo will select the most matching bank transaction record from general ledger same as payment matching.

Clicking the **Reconcile** button will complete the process.

# Asset Management

Odoo's asset management allows you to track your fixed assets like, equipment, furniture, vehicles, land, etc. You can purchase, sell and manage depreciation using Odoo

We can configure asset categories in Odoo. This will make things easier for normal users by providing complex details in category and use it in assets.

## Create Asset Type

Accounting > Configuration > Management > Asset Type

Create: Category

Asset Type  
**Computers**

**Journal Entries**

Journal	Miscellaneous Operations (IN)	Time Method Based On
Asset Account	101800 Misc Assets	Number of Entries
Depreciation Entries: Asset Account	101800 Misc Assets	One Entry Every
Depreciation Entries: Expense Account		12 months

**Periodicity**

Number of Depreciations
Ending Date
5
12 months

**Additional Options**

Auto-confirm Assets
Group Journal Entries

**Depreciation Method**

Computation Method	Linear
Prorata Temporis	Degressive

**Buttons:** Save, Discard

Advisor can give the appropriate accounts for generating journal entries here. He can also provide details to compute the depreciation. There are many things to provide

- **Time method based on:** Method to compute the depreciation date and number of depreciation lines. We have two options here.
  - **Number of depreciation:** by choosing this option we are fixing the number of depreciation and the time between two depreciations.
  - **Ending date:** This way, instead of giving the number of depreciation. We give the date that depreciation will not go beyond

**Periodicity**

Time Method Based On	<input type="radio"/> Number of Depreciations <input checked="" type="radio"/> Ending Date
One Entry Every	12 months
Ending date	<input style="width: 100px; height: 20px;" type="button" value="..."/>

- Computation Methods:** Here we can choose the method to use for computing the depreciation amount. Here also we have two options
- Auto-confirm Assets:** Ticking this option will auto confirm all the assets comes under this category when they created from the invoices.
- Group Journal Entries:** if you want to group the journal entries generated using the category, tick this option.

### Create Asset

We can create an asset in two ways:

- Manually
- From Supplier Invoice To create an asset manually,

### Accounting > Advisor > Assets

Asset Name		<b>Laptop Acer</b>		<input style="width: 100px; height: 20px;" type="button" value="..."/> 0 Items
Category	Computers	Currency	INR	<input style="width: 100px; height: 20px;" type="button" value="..."/>
Reference	<input type="text"/>	Gross Value	40000.00	<input style="width: 100px; height: 20px;" type="button" value="..."/>
Date	09/16/2017	Salvage Value	10000.00	<input style="width: 100px; height: 20px;" type="button" value="..."/>
		Residual Value	30,000.00 ₹	<input style="width: 100px; height: 20px;" type="button" value="..."/>
		Vendor	<input type="text"/>	<input style="width: 100px; height: 20px;" type="button" value="..."/>
		Invoice	<input type="text"/>	<input style="width: 100px; height: 20px;" type="button" value="..."/>
Depreciation Board		Depreciation Information		
Computation Method		<input checked="" type="radio"/> Linear <input type="radio"/> Degressive		
Time Method Based On	<input checked="" type="radio"/> Number of Depreciations <input type="radio"/> Ending Date			
Prorata Temporis	<input type="checkbox"/>			
Number of Depreciations	5			
Number of Months in a Period	12			

Here we can fill the details of your asset

- **Salvage value:** this is the amount you plan to have that cannot depreciate
- **Vendor:** The vendor from we purchased this asset
- **Invoice:** The invoice related to the purchase of this asset

An asset have three states

- Draft
- Running
- Close

Once we created an asset, we should **confirm** it. We can also click on the Compute Depreciation button to check the depreciation board before confirming the asset.



Then the asset will change to **Running** state you can see the depreciation board

Asset Name		0 Items	
<b>Laptop Acer</b>			
Category	Computers	Currency	INR
Reference Date	09/16/2017	Gross Value	40,000.00₹
		Salvage Value	10,000.00₹
		Residual Value	30,000.00₹
		Vendor Invoice	<input type="text"/>
Depreciation Board		Depreciation Information	
Depreciation Date	Cumulative Depreciation	Depreciation	Residual
01/01/2017	6,000.00	6,000.00	24,000.00
01/01/2018	12,000.00	6,000.00	18,000.00
01/01/2019	18,000.00	6,000.00	12,000.00
01/01/2020	24,000.00	6,000.00	6,000.00
01/01/2021	30,000.00	6,000.00	0.00

Draft Bill

Vendor	John Honai	Bill Date																			
Vendor Reference		Due Date																			
		Currency	INR																		
<input type="radio"/> Bill <input type="radio"/> Other Info <table border="1"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Asset Category</th> <th>Account</th> <th>Quantity</th> <th>Unit Price</th> <th>Discount (%)</th> <th>Taxes</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td colspan="9">Add an item</td> </tr> </tbody> </table>				Product	Description	Asset Category	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount	Add an item								
Product	Description	Asset Category	Account	Quantity	Unit Price	Discount (%)	Taxes	Amount													
Add an item																					

The red button indicates that related journal entry is not created and green bullet means that the journal entry has created for this line

You can sell or dispose the asset using the **Sell or Dispose** button on status bar. It will create a journal entry to post the full expense of the asset. But it won't create a sale entry or an invoice.

To modify the depreciation of an asset, Click on the <**Modify Depreciation**> button and provide the values accordingly.

**Modify Asset**

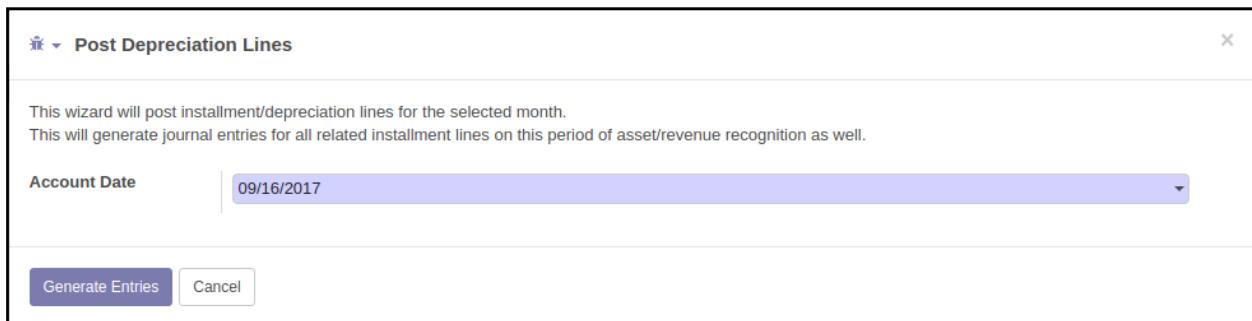
<b>Asset Durations to Modify</b>		
Reason	Laptop Acer	Period Length
		12 months
Number of Depreciations	5	
<input type="button" value="Modify"/> <input type="button" value="Cancel"/>		

*Creating an asset from supplier invoice is easier.*

We just have to give the asset category. Odoo will create asset based on the data in category and invoice. If we set asset category in product itself, then asset category in invoice line will be automatically selected.

Asset will be automatically confirmed if we tick the asset category option **Auto-confirm Assets**.

- **Accounting> Advisor> Generate Asset Entries**, is an option to trigger the generation of asset depreciation entries



## Analytic Accounting

Odoo have a feature called analytic accounting. This is an advanced feature that we can use for different purposes. Like,

- Cost center concept
- Timesheet invoicing
- Project management
- Budget management

We have to enable analytic accounting first from settings to use this feature.

We have to create analytic accounts here,

**Accounting> Configuration> Analytic Accounting>Analytic Account.**

You can select a customer for an analytic account. Then, this will be added to the name of analytic account. It will make the selection of analytic account easy.

Now you can select this analytic account in Invoices.

**Bill**

**BILL/2017/0002**

Vendor	John Honai	Bill Date	09/20/2017
Vendor Reference		Due Date	
		Currency	INR

Bill	Other Info								
Product	Description	Asset Category	Account	Analytic Account	Analytic Tags	Quantity	Unit Price	Taxes	Amount
iPhone 7	iPhone 7		210700 Purchase Expense	Administration		1.000	750.00	VAT 10%	750.00 ₹

Let's check the changes this makes.

**BILL/2017/0002**

Journal	Vendor Bills (INR)	Reference	Reconciled entries
Date	09/20/2017		

Journal Items									
Account	Partner	Label	Analytic Account	Amount currency	Currency	Debit	Credit	Due date	
112110 Creditors	John Honai /			0.00		0.00 ₹	825.00 ₹	09/20/2017	
210700 Purchase Expense	John Honai	VAT 10%	Administration	0.00		75.00 ₹	0.00 ₹	09/20/2017	
210700 Purchase Expense	John Honai	iPhone 7	Administration	0.00		750.00 ₹	0.00 ₹	09/20/2017	
825.00 825.00									

Here we can see that each debit entry have analytic entries selected. This will create an analytic entries in Odoo. You can see the analytic entries under **Accounting> Advisor> Analytic Entries**.

Description	VAT 10%	<b>Amount</b>	
Analytic Account	Administration	Amount	-75.00₹
Financial Account	210700 Purchase Expense	Amount Currency	0.00
Ref.		Product	
Partner		Unit of Measure	
Move Line	BILL/2017/0002	Quantity	1.00
Date	09/20/2017		

Description	iPhone 7	<b>Amount</b>	
Analytic Account	Administration	Amount	-750.00₹
Financial Account	210700 Purchase Expense	Amount Currency	0.00
Ref.		Product	iPhone 7
Partner		Unit of Measure	Unit(s)
Move Line	BILL/2017/0002	Quantity	1.00
Date	09/20/2017		

These are the analytic entries created. Unlike general accounting journal entry, analytic entry don't have debit/credit. It is handled with negative and positive value for 'amount'.

Administration		Active	\$ Cost/Revenue
Reference			
Customer		Tags	
		Currency	INR

By clicking this Cost/Revenue smart button we can see the analytic entries of that account.

# Budget Management

Budget management plays an important role in the success of any business. We can check our financial status with the planned details using Odoo's budget management section. Odoo uses its general and analytic accounting in budget management.

We need to configure three things to work with Odoo budget management

- Budgetary Positions
- Analytic Accounts
- Budget

Budgetary positions are a kind of mapping the general accounts with budgets Let's create a budgetary position.

We can create budgetary position from Budget form itself,

Or we can create from

- **Accounting>Configuration>management>Budgetary Position**

We are now creating a budgetary position Income.

The screenshot shows the 'Accounts' tab of the 'Budgetary Position' creation form. The 'Name' field is filled with 'Income'. The 'Accounts' table lists various general ledger accounts under the 'Income' budgetary position:

Code	Name	Action
201200	Write off Income	trash
201100	Gain on Sale of Assets	trash
201000	Interest Revenues	trash
200220	Export Services	trash
200210	Local Services	trash
200130	Export Sales	trash
200120	Retail Sales	trash
200110	Local Sales	trash

At the bottom of the table, there is a link 'Add an item'.

We have selected some General accounts under this budgetary position. Same way we are creating another one, Expense.

Name	Expense
Accounts	
Code	Name
210700	Purchase Expense
210600	Telephone Expense
210500	Internet Expense
210300	House Keeping Expense
210200	Office Rent
210100	Salary Expense
210000	Electricity Expense
Add an item	

Now we have two budgetary position in our system.

The role of analytic accounting comes when we have to get the details based on a specific Customer/Supplier or a project. We already discussed how we can create an analytic account.

So we are moving to the configuration of budget.

Budget Name	Budget-2017						
Responsible	Administrator	Period					
	01/01/2017	12/31/2017					
Budget Lines							
Budgetary Position	Analytic Account	Start Date	End Date	Planned Amount	Practical Amount	Theoretical Amount	Achievement
Add an item							
				0.00	0.00	0.00	

As we can see on the picture, we have to give a **Name** for budget and also a **Period**. Then we must add our budgetary positions we already created to this budget.

At that time we have to provide our planned amount to that position.

Open: Budget Lines

Budgetary Position	Income	Period
Planned Amount	100,000.00	01/01/2017 - 12/31/2017
Analytic Account	Project 1 - Hassan Benha	
<input type="button" value="Save &amp; Close"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Discard"/>		

- Add other necessary fields you need.

### Budget-2017

Responsible	Administrator	Period	01/01/2017 - 12/31/2017				
Budget Lines							
Budgetary Position	Analytic Account	Start Date	End Date	Planned Amount	Practical Amount	Theoretical Amount	Achievement
Income	Project 1 - Hassan Benha	01/01/2017	12/31/2017	100,000.00	0.00	72,377.66	0.00
Expense	Project 1 - Hassan Benha	01/01/2017	12/31/2017	750,000.00	0.00	542,832.44	0.00
				850,000.00	0.00	615,210.09	

Now you can see there is four columns in the table

- **Planned amount:** The amount we gave
  - **Practical Amount:** It is the actual amount
  - **Theoretical amount:** It is the amount we could have spent/ received till today  
“If the planned amount is 12000 then for one year, then on January 31st the theoretical amount will be 1000. On May 31st it will be 5000, On December 31st it will be 12000.”
  - **Achievement:** percentage of practical amount with respect to theoretical amount.
  - We have to Confirm and approve the budget
- You can check the budget any time.

# Customer Relationship Management

Customer Relationship Management, which is the most important part of a business, is simplified with Odoo CRM system. Odoo CRM is a combination of 8 Apps and Plugins. For efficient management of customer relation, you must install all the following Apps/Plugins.

- CRM

And following optional apps can further enhance CRM capabilities

- CRM Gamification
- Marketing campaign
- Survey CRM
- Contact Form
- Resellers
- Lead to Issue
- Opportunity to quotation

Since any discussion on CRM can't be completed without sales procedure, in this section we will explain CRM combined with sales module. To get sale features in your ERP you have to install following apps from Odoo.

- Sales
- Sales Teams
- Sales and MRP management
- Margins in sales orders etc.

The first application ‘sales’ alone can facilitate all sales related procedures rest is options. However, for a better sales management, you may install rest of the apps also. You can find more related applications from Apps tab in your ERP.

Comparing to other CRM applications like SalesForce, Zoho, and Sugar CRM Odoo has a lot of unique features. If we consider the case of ‘Salesforce’ Odoo has an advantage of features like Price list, Quotation Templates, eSignature, Online Payment, Invoicing, Customer Portal, Shipper Integration, Leads Tracking, Social Network Integration etc. If it is in the case of Zoho the list changes to Pipeline management, Next Action, Multiple companies per contract, Pricelist, Quotation Templates, eSignature, Drag and Drop management etc. Undoubtedly Odoo user interface is the easiest and user-friendly among all these CRM’s.

## **Some of the useful features of Odoo CRM includes**

- **Priorities activities**

Priorities the follow-up activities in pipeline and meet your targets efficiently

- **Track your sales activities.**

Track the sales stages more easily via sales pipeline Kanban view.

- **Schedule Meetings**

Schedule meetings directly from the opportunity of customer

- **Dashboards**

Get all the necessary details of ongoing and done business activities in your Dashboard

- **Get in touch with customers**

Maintain Communication with customers via email, phone, chat, and social media from within your Odoo CRM.

- **Leads Promotion**

Start campaign by sending auto generated emails to customers in Leads. Assign a salesperson to follow the lead and promote it.

- **Opportunities Analysis**

Analyze your opportunities pipeline with advanced filters, grouping, drill down, etc.

- **Lead Scoring**

Score your leads based on explicit and implicit criteria and decide which lead satisfies the benchmark to become opportunity.

- **Customized Alerts**

Set custom alerts for opportunities based on some activities

- **Analyze Opportunity lost**

Analyze the reasons behind the loss of opportunities and improve your sales efficiency.

- **GeoIP**

Detect countries, states and cities of leads automatically from your visitor IP address.

- **Automate routines and Focus on sales**

Automate routine business activities, don't waste time on maintain data.

## **Odoo CRM general workflow**

CRM in Odoo can be explained as a series of events that start with identifying a **Lead** (a future sale possibility) and passes through different stages like **Opportunity**, **Quotation**, **Sale Order** and actual sale (invoice generation and payment). Odoo integrates Customer Management module along with these processes to accomplish effective Customer Relationship Management. The basic steps involved in tracking a sale can be listed as below

**Lead:** - A possible future sale, it may be created just because a user enquired a product

**Opportunity:** - More possibility of sale. Here onwards the organization may appoint a person to follow-up the customer.

**Pipeline:** - it is a convenient mechanism provided by Odoo to track Opportunity. You can create many stages based on the possibility of the Sale and track more effectively.

**Quotation:** - once the opportunity is Won, then next level is to make a quotation and send to the customer.

Next, **Quotation** changes to **Sale Order** and then to **Invoice Generation** and **Payment**.

## **System Users**

There are three types of default user as far as CRM (Including Sales + Purchase + Customer Management) module is concerned.

**Manager:** - who will have complete access over all these Sales, Purchase modules

**User - Own documents only:** - This user will have the permission to control the documents and entries created by him. For example, you can restrict a sales executive from accessing another sales executives documents.

**User - All documents:** - may be a sales head, he has to view all the documents by all sales representative.

# **Customer Management**

## **Create customer**

Basically, in Odoo CRM a person you add is called **Partner** rather than **Customer** i.e. you can keep the entity both as a **Customer and Vendor**

- **Sales -> Customers -> Create**

The screenshot shows the 'Customers / New' creation form. At the top, there are 'Save' and 'Discard' buttons. Below them, a radio button group for 'Individual' (selected) and 'Company'. A large input field for 'Name' with a placeholder 'Company'. To the right, a summary box displays metrics: Active (0), Opportunities (0), Meetings (0), Activities (0), Unpublished On Website (0), Invoiced (0.00), Sales (\$0), and Tasks (0). The main form area has sections for 'Address' (Street, Street 2, City, State, ZIP, Country), 'Job Position' (e.g. Sales Director), 'Website' (e.g. www.odoo.com), 'Mobile', 'Fax', 'Email', 'Title', 'Tags' (Tags... dropdown), and 'Language' (English dropdown). Below these are tabs: 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases' (selected), 'Accounting', and 'Partner Assignment'. Under 'Sales & Purchases', there are two sections: 'Sale' (Is a Customer checked, Salesperson dropdown) and 'Purchase' (Is a Vendor unchecked).

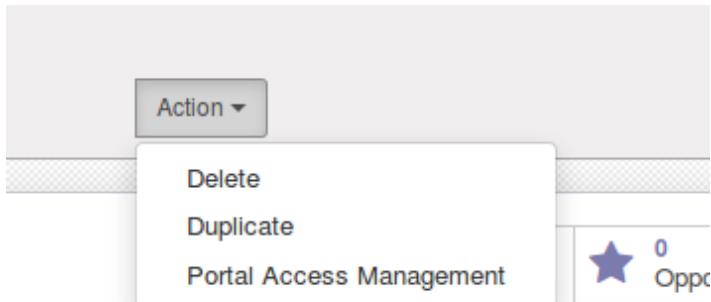
Tick **Is a Customer**, Is a Vendor check boxes in Sales & Purchases according to the nature of entity.

- Use **Partner Assignment** tab to track Geo-location of customer
- **Accounting** tab can be used to add accounting info of the entity.
- Choose between **Individual , Company** radio button accordingly
- Click on **Active** button to activate the profile for use (otherwise it will not be listed elsewhere).

If we go to the **Sales & Purchases** tab, we can specify a salesperson who is in charge of communicating with this customer. We can also choose that this customer should be able to receive email notifications or not. If this option is enabled, then this **customer will receive emails for each notification in his inbox**.

The field, '**Mailing Opt-Out**' is really useful in cases where we don't need to receive any emails from mass mailing or marketing campaigns. If this option is enabled, this customer won't receive any emails from mass mailing and marketing campaigns. The Number of bounced emails will be displayed in the 'Bounce' field.

For providing portal access, we need to configure the email and enable the '**In Portal**' option for those customers.



Upon clicking on the 'Portal Access Management' option, a new wizard will appear. Here we can enter the email address. The option 'In Portal' should be selected for those contacts to whom we wish to enable the portal access. Once we have filled the details and applied, an email will be sent to the specified email address. With the portal access enabled, the user can sign in to Odoo from the link provided in the E-mail

## Update/Delete a Customer Details

- Sales -> Customers

Click on any of the Customer from Kanban view

Customer Summary	
★ 0 Opportunities	0 Meetings
Unpublished On Website	\$0.00 Invoiced
\$ 0 Sales	0 Tasks

Functional Consultant  
thomas.passot@agrolait.example.c...  
English

- Click <Edit> to make modifications
- Or find more Details related with the customer from Action tab

**Note:** - “You can directly jump to the opportunities, meetings, invoice, Tasks, Ledger and any details linked with your customer from this window.”

# Product Management

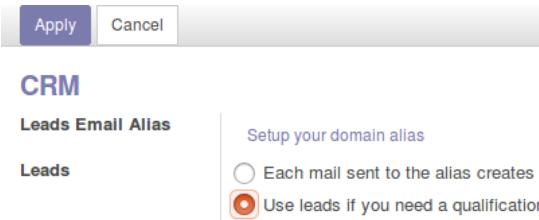
To sell any product, we must create a product or add a product to our inventory. Though it is an activity done under inventory management, Odoo Sales module provides a quick link under **Sales > Products** tab to perform product management functions like Add Product Update Stock etc. To see the full functionality and processes in Product Management refer Inventory management module

## Pre-Sale Tracking

### Lead Generation

For handling our leads with Odoo, first we have to **enable the leads option from the settings**.

- **Sales -> Configuration -> Settings**



After this option is enabled, a new menu for creating the leads will appear.

- **Sales -> Leads -> Create**

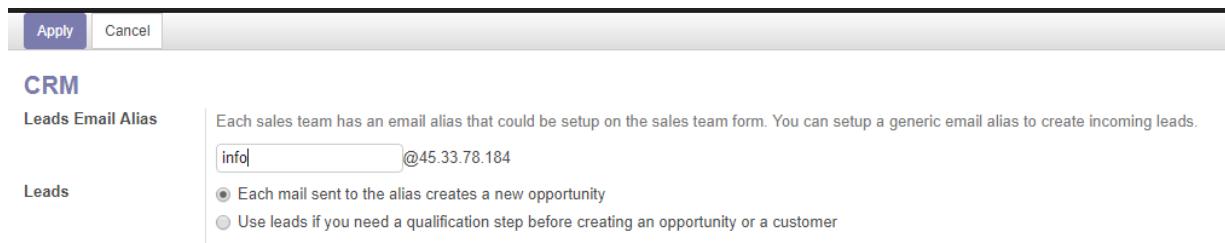
A screenshot of the Odoo Sales Leads Create form. The title bar says 'Leads / Interest In Your New Product'. It has 'Save' and 'Discard' buttons. Below that is a 'Convert to Opportunity' button. The main form is titled 'Lead' and has a status field set to 'Active'. The form fields include:

- Customer:** A dropdown menu.
- Company Name:** An input field.
- Address:** Input fields for Street, Street 2, City, State, ZIP, and Country.
- Contact Name:** An input field.
- Email:** An input field.
- Job Position:** An input field.
- Phone:** An input field.
- Mobile:** An input field.
- Fax:** An input field.
- Salesperson:** A dropdown menu currently set to 'Administrator'.
- Sales Team:** A dropdown menu currently set to 'Direct Sales'.
- Rating:** A dropdown menu with three stars highlighted.
- Tags:** A dropdown menu.

In the lead creation form, we can select a customer or we can create a new customer and link to this lead. Complete address of this customer can be specified here. There are some optional fields such as email, contact name, job position, mobile, phone, fax, etc. are available. **The corresponding salespersons details who creates this lead will be automatically filled and his sales team will also be selected automatically.**

Or you can generate Leads from Incoming Mails

There are several ways for your company to generate leads with Odoo CRM. One of them is using your company's generic email address as a trigger to create a new lead in the system. In Odoo, each one of your sales teams is linked to its own email address. You can configure this E-mail to generate Leads automatically. For this, first we need to configure the Incoming & Outgoing mail servers from settings.



## Opportunities

- Sales -> Leads

The screenshot shows the 'Leads / Information about laptop' form. At the top, there are 'Edit' and 'Create' buttons, and a header with 'Attachment(s) ▾', 'Action ▾', and page navigation '1 / 8 < >'. Below the header, a 'Convert to Opportunity' button is visible. The main area is titled 'Information about laptop' and shows the following data:

Company Name	Solar IT	Contact Name	Jose Garcia
Address	Madrid 28001	Email	jga@solar.example.com
	Spain	Job Position	Medical Illustrator
		Phone	
		Mobile	
		Fax	
Salesperson	Demo User	Rating	★★☆
Sales Team	Unknown	Tags	Product

At the bottom of the form, there are tabs for 'Internal Notes' and 'Extra Info'.

- Click Convert To Opportunity

## Convert to opportunity

- Conversion Action
- Convert to opportunity
  - Merge with existing opportunities

### Assign this opportunity to

Salesperson

Administrator

Sales Team

Direct Sales

### Customers

- Link to an existing customer
- Create a new customer
- Do not link to a customer

Create Opportunity

Cancel

If we select the conversion action '**Convert to opportunity**', then a new opportunity will be created. If '**Merge with existing opportunities**' is selected, then a new option will appear which will allow us to select the opportunities.

- Conversion Action
- Convert to opportunity
  - Merge with existing opportunities

### Assign this opportunity to

Salesperson

Administrator

Sales Team

Direct Sales

- Field: opportunity\_ids
- Object: crm.lead2opportunity.partner
- Type: many2many
- Relation: crm.lead

### Opportunities

Create Date	Opportunity	Type	Contact Name	Email	Phone	Stage	Salesperson	Sales Team
Add an item								

We can assign this opportunity to a salesperson and his team. While creating the opportunities, it is optional for us to link it with a customer. If we select the option '**Do not link with a customer**', then no customer will be linked with. There are other options available to link with existing customer or to create a new customer and link with him.

Or you can create opportunity directly

- Sales -> My Pipeline -> Create

>Create an Opportunity

---

Opportunity Title	Interest In Your New Product
Customer	
Expected Revenue	500
Rating	★ ★ ☆

---

**Create** **Discard**

**Note:** - “Once a lead is converted to Opportunity it is pipelined”

## Sales Pipeline

After creating the opportunities, it will be displayed in the Sales Pipeline section. From ‘My Pipeline’ menu, we can see that all the opportunities are grouped by their corresponding stages.

- Sales -> My Pipeline

The screenshot shows the Odoo Sales Pipeline interface. On the left, there is a sidebar with navigation links like Dashboard, Sales, Leads, Customers, My Pipeline (which is currently selected), Next Activities, Quotations, Sales Orders, Products, Product Variants, Invoicing, Sales to Invoice, Orders to Upsell, Reports, Pipeline, Leads, Activities, and Help.

The main area is titled "Your Pipeline" and shows four stages of opportunities:

- New:** Contains two items:
  - Plan to buy 60 keyboards and mouses (\$40,000.00) with a rating of ★ ★ ☆ and assigned to a contact.
  - rtyuiop with a rating of ★ ★ ☆ and assigned to a contact.
- Qualified:** Contains one item: rtyuiop with a rating of ★ ★ ☆ and assigned to a contact.
- Proposition:** Contains three items:
  - Need to customize the solution (\$4,500.00) with a rating of ★ ★ ☆ and assigned to a contact.
  - "Resource Planning" project development (\$9,000.00, Delta PC) with a rating of ★ ★ ☆ and assigned to a contact.
  - Interest in your customizable Pcs (\$15,000.00, Campocamp) with a rating of ★ ★ ☆ and assigned to a contact.
- Won:** Contains two items:
  - 2 pair rabbit (\$4,000.00, abi) with a rating of ★ ★ ☆ and assigned to a contact.
  - Need script to Import external data (\$5,600.00, Campocamp) with a rating of ★ ★ ☆ and assigned to a contact.

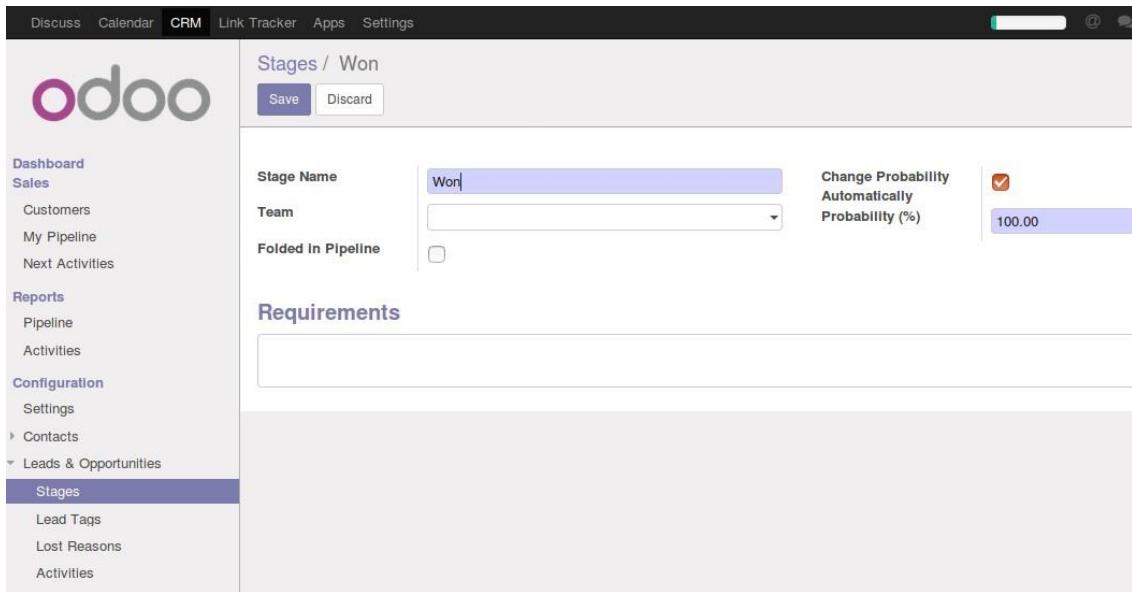
At the top right, there are filters, search bar, and other interface elements. A vertical sidebar on the right allows adding new columns.

One of the main features of Odoo is the ‘Drag and drop’ facility in this view. **We can change the status or stage of an opportunity by simply dragging from one stage to another.**

## Pipeline Configurations

We can configure the stages we want to use in our pipeline. Under the CRM module

- Configuration -> Leads and Opportunities -> Stages

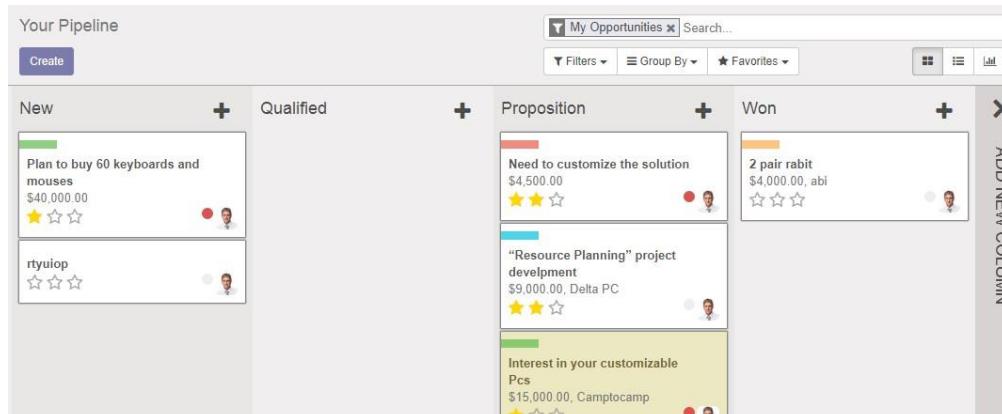


Here we need to provide a **Stage Name**, and **Stage Probability** to specify the probability of the lead when that lead is in this stage.

- We can relate this stage to a sales team if we need. **If we select a team, then this stage will be accessible to those team members only.**

## Edit/Update Pipeline Content

- Sales -> My Pipeline



- To create new opportunities, click ‘Create’ button. Edit an Existing opportunity select any of the opportunity from list.

Your Pipeline / Interest In Your New Product

Save Discard

1 / 1 < >

Mark Won Mark Lost Log Activity New Qualified Proposition Won

**Opportunity**

**Interest In Your New Product**

Expected Revenue: 500.00 € at 10 %

Customer: Hassan Benha

Email: benna@example.com

Phone:

Salesperson: Administrator

Sales Team: Direct Sales

Next Activity

Expected Closing

Rating: ★★★

Tags:

0 Meeting

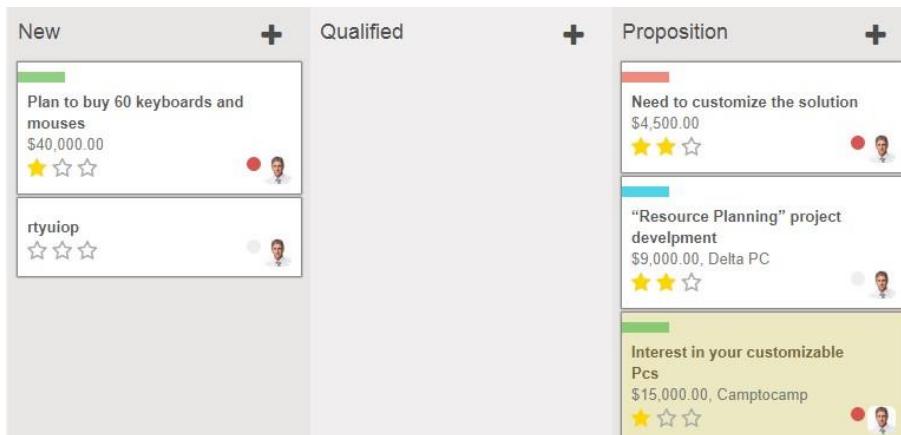
- We can use the field ‘customer’ to select the customer related with this opportunity

Expected revenue from this Opportunity and probability of winning this Lead and converting it to our sales will also be shown here. Once we have set any Meetings related to this Opportunity, it can be seen by clicking on the button at the right top corner of this form. The number of meetings will be shown. In the **Contact Information** tab, the details of the contact related to this opportunity can be specified. The buttons, ‘**Mark Won**’ and ‘**Mark Lost**’ are used to mark the opportunity as won or lost.

## Next Activity field in Pipeline

This another important settings available in Pipeline. At each stage of Pipeline we can assign next activity to be done for the follow up of that opportunity. To set next activity

- Sales -> My Pipeline**



At the right bottom of every Lead, we can see a white dot symbol, which can be used to assign **Next Activities** to this opportunity. Upon clicking it, a new wizard will appear, which will allow us to create the next activity.

Schedule an Activity

Activity:

Next Activity Date:

Summary:

Recommended activities:

- Email
- Call
- Task

**Schedule Activity** **No activity**

The **Next Activity** can be Email, Call or Task. We should set a date and summary to specify the purpose of this activity.

**Note:** - “you can track all the recorded ‘Next Activity’ from Sales -> Next Activities”

Next Activities						
		My Opportunities <input type="text"/> Search...				
<input type="button" value="Create"/> <input type="button" value="Import"/>		<input type="button"/> Filters <input type="button"/> Group By <input type="button"/> Favorites <input type="button"/> 1-4 / 4 <input type="button"/>				
Opportunity	Customer	Next Activity Date	Next Activity	Next Activity Summary	Stage	Expected Revenue
Interest in your customizable PCs	Camptocamp	07/30/2017	Call	Followup on the proposal	Proposition	15,000.00 08/08/2017
Need to customize the solution		08/01/2017	Call	Conf call with technical service	Proposition	4,500.00
Need 20 Days of Consultancy		08/03/2017	Email		Proposition	60,000.00
Plan to buy 60 keyboards and mouses		08/04/2017	Task	Meeting to go over pricing information.	New	40,000.00 08/15/2017

## Quotation

### Create Quotation

Once the opportunity has been ‘Won’, next level is initiating actual sales procedure. So first step is preparing a quotation and send it to the customer. You can create a quotation by two methods.

- **Sales -> Quotation -> Create**

Quotations / New

Save Discard

Send by Email Print Confirm Sale Cancel Quotation Quotation Sent Sales Ord

**New**

Customer: Hassan Benna

Order Date: 06/30/2017 10:13:00

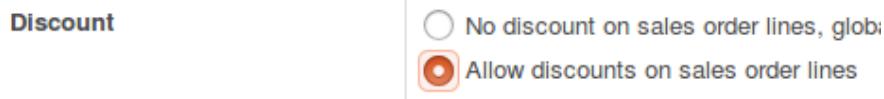
Expiration Date:

Payment Terms:

Product	Description	Ordered Qty	Unit Price	Taxes	Discount (%)	Subtotal
+ iPhone 7	iPhone 7	1.000	150.00	(standard) Input Excise Duty @ 12.36%	0.00	150.00

Add an item

- The expiration date field is used to set the validity or expiration date of this quote. (*If this field is not set, it will be automatically calculated based on the template associated with it if online quotation is installed.*)
- The **Payment Terms** specify the conditions for paying an invoice.  
(We can set it like, if the customers pays within 10 days, he will get 20% discount, etc.)
- We can provide discounts to the order lines by enabling the option from the **Settings**.



- The '**Send By Email**' button can be used to send this quotation to the customer by email.
- Under the '**Other Information**' tab, we can provide the related salesperson and his team.

Order Lines Other Information

**Sales Information**

Salesperson: Administrator

Sales Team: Direct Sales

Customer Reference:

**Invoicing**

Fiscal Position:

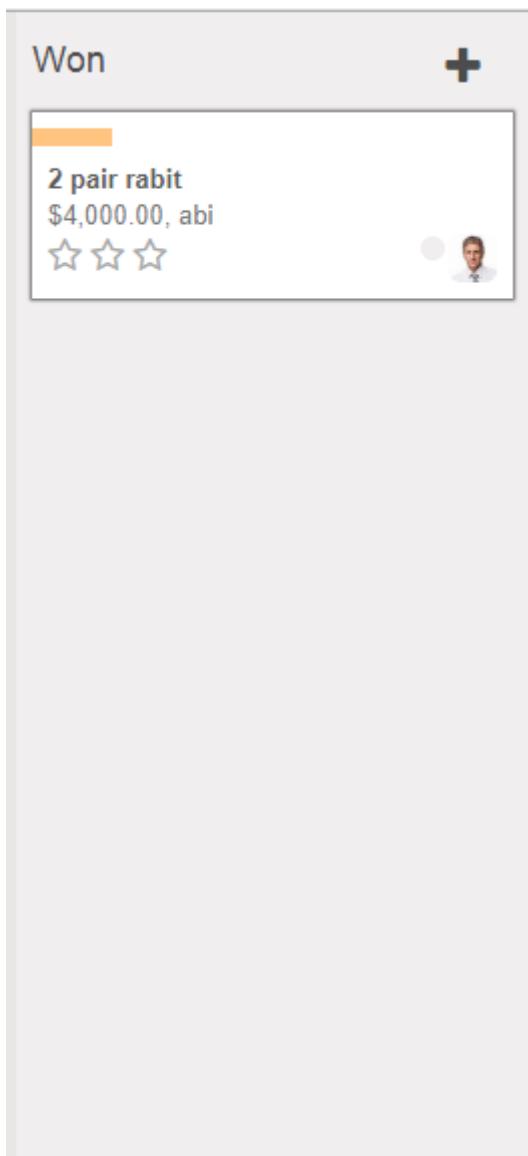
**Reporting**

Source Document:

Or you can create a Quotation from your Pipeline.

Once the opportunity is won (it reached its final confirmation stage), there is direct button to create Quotation for that opportunity.

- **Sales -> My Pipeline -> Won** (or Whatever be the final Stage) Select any of the 'Won' opportunity



Your Pipeline / 2 pair rabbit

Edit Create Attachment(s) Action 8 / 8

New Quotation Mark Lost Log Activity New Qualified Proposition Won

### 2 pair rabbit

\$4,000.00 at 100 %

Customer	abi	Next Activity	Active	0 Meeting	0 Quote(s)
Email		Expected Closing	09/26/2017		
Phone					
Salesperson	Administrator	Rating	<span style="color: #ccc;">☆ ☆ ☆</span>		
Sales Team	Direct Sales	Tags	Services		

[Internal Notes](#) [Contact Information](#)

- <New Quotation>

## Sale Order & Invoicing

### Create Sale order

As in the case of quotation we can create a sale order in two ways.

- Sales -> Sales Orders -> Create

Sales Orders / New

Save Discard Send by Email Print Confirm Sale Cancel Quotation Quotation Sent Sales Order

### New

Customer	Order Date	09/15/2017 09:08:42
	Expiration Date	
	Payment Terms	
	Delivery Method	

[Order Lines](#) [Other Information](#)

Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
Add an item							
<small>Setup default terms and conditions in your company settings.</small>							
						Untaxed Amount : 0.00	Taxes : 0.00

Here we get a window to create a Quotation create Quotation and click **Confirm Sale** to create sale order.

- Once the sale order is created you can access the same from inventory Module too.

## Create Invoice

**Sales -> Invoicing -> Sales To Invoice**

Select the sale order to invoice.

Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
[1] Ice Cream	[1] Ice Cream	1.000	0.000	0.000	100.00	Tax 15.00%	\$ 100.00

Just like the quotation, it is possible for us to specify the salesperson and the sales team related under the '**Other Information**' tab.

- The '**Lock**' button is used to lock this sale order. Once it is locked, it cannot be edited. But we can deliver or create invoices for this order.
- The invoice status of this order will be shown under the Other Information tab.
- Click **Create Invoice** to generate invoice

## Invoice Order

Invoices will be created in draft so that you can review them before validation.

- What do you want to invoice?
- Invoiceable lines
  - Invoiceable lines (deduct down payments)
  - Down payment (percentage)
  - Down payment (fixed amount)

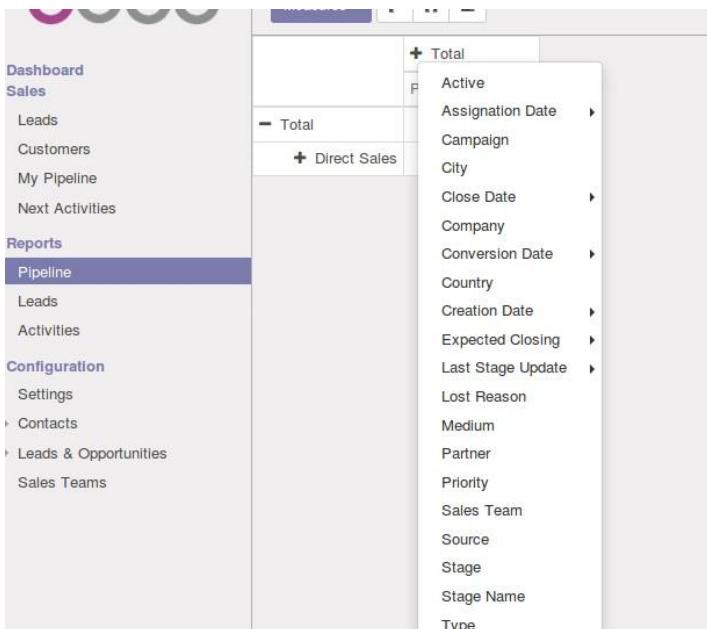
[Create and View Invoices](#) [Create Invoices](#) [Cancel](#)

- The first option will invoice all the Invoiceable products in this order.
- Second option can be used to deduct the down payment and the other two are for providing down payment.
- If the user creating this invoice does not have access in the accounting section, he can just create the invoice. But he won't be able to see or access it.

## Reporting

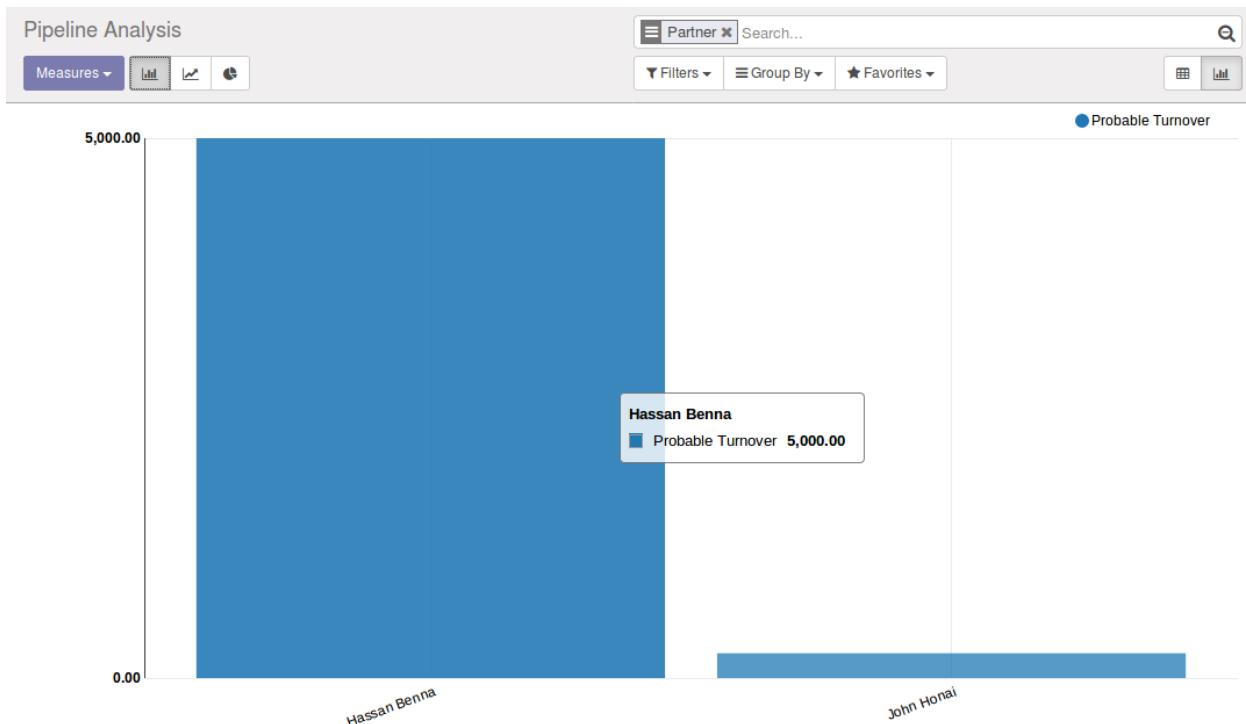
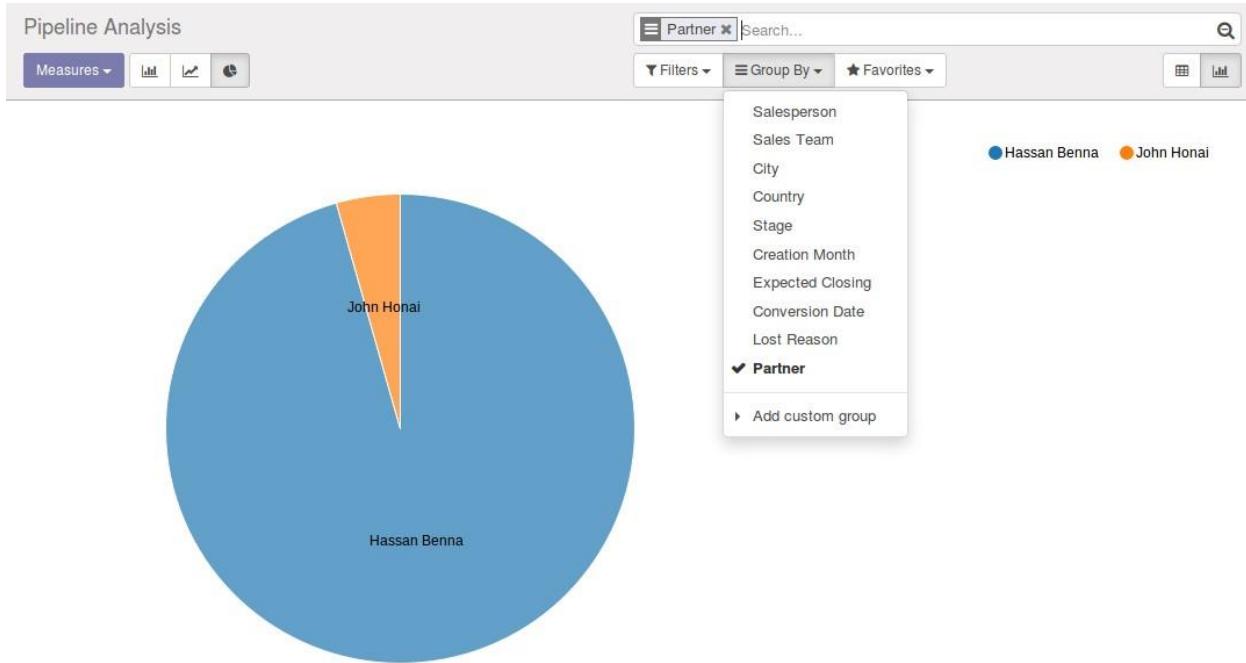
We can access several types of reports in Odoo. It is possible to analyze the Leads and Opportunities based on team, salesperson, state, etc.

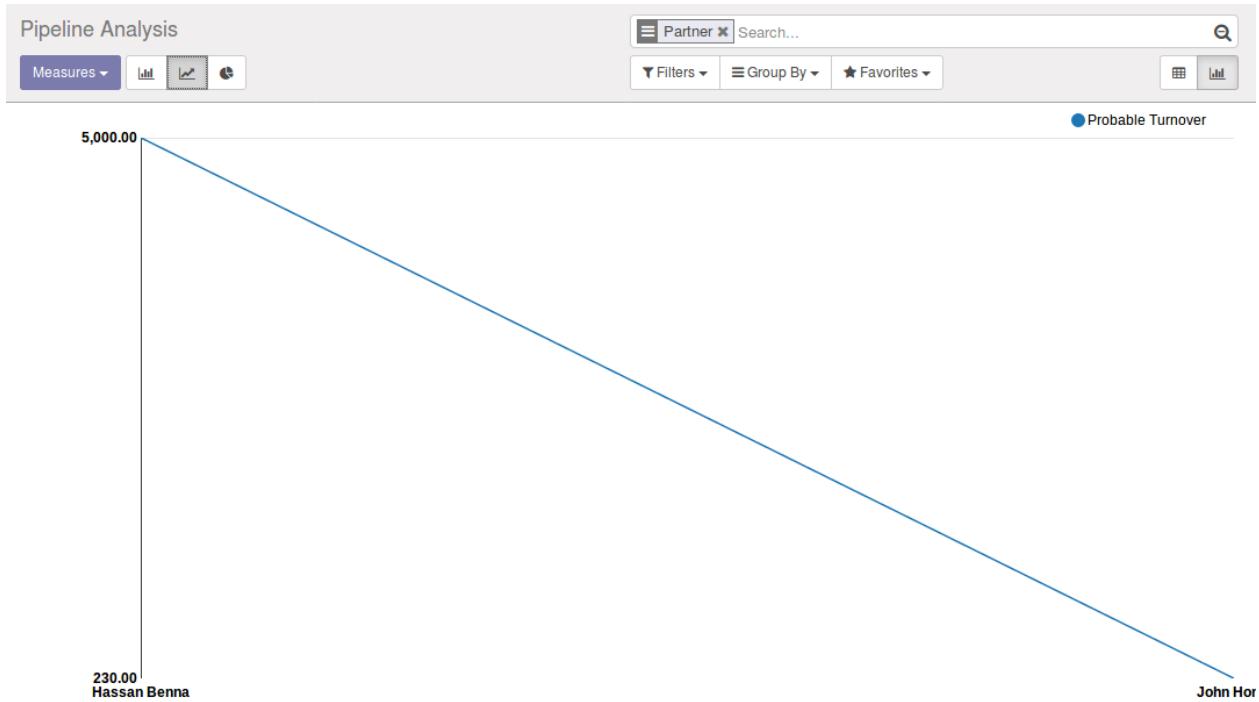
- Sales -> Reports



The screenshot shows the Odoo Sales module interface. On the left, there is a sidebar with navigation links: Dashboard, Sales (Leads, Customers, My Pipeline, Next Activities), Reports (Pipeline, Leads, Activities), Configuration (Settings, Contacts, Leads & Opportunities, Sales Teams), and a Help section. The 'Pipeline' link under 'Reports' is highlighted with a blue background. The main area displays a configuration interface for the Pipeline report. A tree view on the left lists fields: Total, Active, Assigination Date, Campaign, City, Close Date, Company, Conversion Date, Country, Creation Date, Expected Closing, Last Stage Update, Lost Reason, Medium, Partner, Priority, Sales Team, Source, Stage, Stage Name, and Type. Most of these fields have a small arrow icon next to them, indicating they are expandable. The 'Total' node has a '+' sign next to it, while 'Active' has a '-' sign.

Exapmle:-





## Other Useful Settings

### Order Upsell

- **Sales -> Invoicing -> Orders to Upsell** menu will list the orders having products with an invoicing policy based on ordered quantities for which you have delivered more than what have been ordered

### Enable more than one address field for customer

If we need to have three different addresses for customer, delivery and invoice, we need to enable this option from

- **Sales -> Configuration ->Settings ->Address**



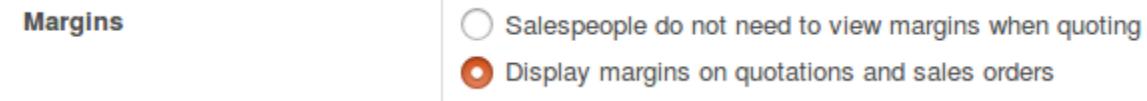
After enabling this option, we can see the new fields appeared for entering these addresses.

These addresses will be displayed in the reports also.



## Setting up margin for Sales

- **Sales -> Configuration ->Settings ->Margin**



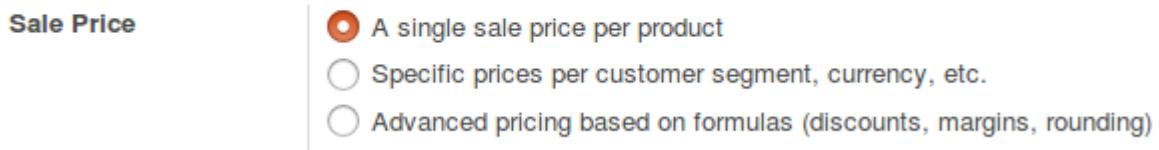
After it is enabled, we can see margin option in sale order.

## Setting Up Sales Pricelists

To use different prices for products based on customers and other criteria, we can use pricelist

- **Sales -> Configuration -> Settings -> Pricing**

## Pricing



- The first option will allow us to use a fixed price per product.
- Second option, we can set different prices for a product per each customer.
- Third can be used to create more advanced pricing rules.

## Define Next Activity

- Sales -> Configuration -> Leads and Opportunities -> Activities -> Create

Activities / New

Save Discard

Message Type

Sales Team

Description

Number of days

Default

Recommended Next Activities

- Fill the fields and <Save>

## Setup Delivery Method

- Sales -> Configuration -> Delivery methods -> Create

Delivery Methods / New

Name  
e.g. UPS Express

Provider

Margin

Description

Pricing      Destination

Fixed Price

Active      Unpublished  
On Website

- Fill the fields and <Save>
- Don't forget to mark it **Active** and **Publish on Website**

## Purchase

Just like the sales, it is really easy to manage our purchases using Odoo. We can generate quotations, convert them to purchase order and generate bills easily. After installing the Purchase Management module from the apps list, we can see the menu item 'Purchases' in our Odoo ERP. Sales and Purchase vouchers, Purchase and MRP management, Purchase requisitions etc. are some other helpful apps which can further enhance purchase management functionalities.

As you all know Purchase is a process of buying goods, service, raw materials and spare parts from suppliers for an organization. Generally, purchase management is one of the most crucial section in an organization. The purchase process in a company should be given the maximum attention. If there is a problem in the purchasing department then problems will arise in the production section, Sales section and will ultimately reduce the performance of the organization. Hence an effective purchase management mechanism is inevitable in any organization. Odoo purchase management can improve your purchase workflow depending on stock levels, sales orders, and forecast manufacturing orders and so on. Here are some features of Odoo purchase management software

Some of the useful features of Odoo Purchase management includes

- **Automate your purchasing workflow:** Here we can automatically send RFQ s- (Request for Quotations) to your suppliers based on your stocks levels. This will improve your purchase and inventory performance along with procurement rules depending on stock levels, logistic rules, and sales orders, forecast manufacturing orders, etc. Select different refill scheme for each product depending on your manufacturing / delivering strategies.
- **Supplier price lists & product availability:** We can easily make efficient purchase decisions using the best prices. With this, we can easily import suppliers' price lists and references to make quick and apt purchase decisions based on different vendor policies, quantities, and special contract conditions. We can easily track the availability of the product in your supplier's inventory and you can also check your order status.
- **Get the best offer with purchase tenders:** Get the best price by bargaining / negotiating with different vendors. We can Launch purchase tenders and simply integrate vendor's answers in the process which help us to compare proposals from different vendors; Choose the best offer and send purchase orders within seconds. We can also use reporting to analyze the proposal of your vendors afterward.

- **Get statistics on your purchases:** Analyze, forecast and efficiently plan your orders in simple steps. Get accurate statistics on your suppliers' performance through flexible reporting delivery delays, negotiated discounts on prices, quantities purchased, etc. Integrate purchases with analytic accounting to analyze your contracts' profitability.
- **Manage several companies:** By using Odoo's multi-company rules we can save time and effort. We can use a single Odoo instance to synchronize operations between different companies. By using this we can create sales orders, share customers, suppliers and products and invoice management for all companies at the same time. You can save even more time by automating the invoicing process between all the companies.
- **Fully integrated with other Odoo Apps:**

**Inventory:** Synchronize your stocks levels based on your purchases and create automatic replacement rules to avoid the out of stock situation

**Invoicing:** Convert your purchase orders in a supplier invoice to avoid double entry.

**Accounting:** Get your accounting more accurate by integrating purchase orders and invoices.

- **Control invoicing:** Odoo ERP purchase module is integrated with inventory, invoice, accounting so you can make the process simple, and accurate.

## System Users

There are three types of default user as far as CRM (Including Sales + Purchase + Customer Management) module is concerned.

**Manager:** - Who will have complete access over all these Sales, Purchase modules

**User- Own documents only:** - This user will have the permission to control the documents and entries created by him. For example, you can restrict a sales executive from accessing another sales executives documents.

**User- All documents:** - for example, a Sales Head he has to view documents created by all sales executives.

## **Odoo Purchase management general workflow.**

**A Request for Quotation (RfQ):** is used when you plan to purchase some products and you would like to receive a quote for those products. In Odoo, the Request for Quotation is used to send your list of desired products to your supplier. Once your supplier has answered your request, you can choose to go ahead with the offer and purchase or to turn down the offer.

**A Purchase Tender (PT):** also known as Call for Bids, is used to drive competition between several suppliers in order to get the best offer for a list of products. In comparison to the RfQ, a Purchase Tender is sent to multiple suppliers, stating each are competing with one another, and that the best offer will win. The main interest is that it usually leads to better offers.

**The Purchase Order (PO):** is the actual order that you place to the supplier that you chose, either through a RfQ, a Purchase Tender, or simply when you already know which supplier to order from.

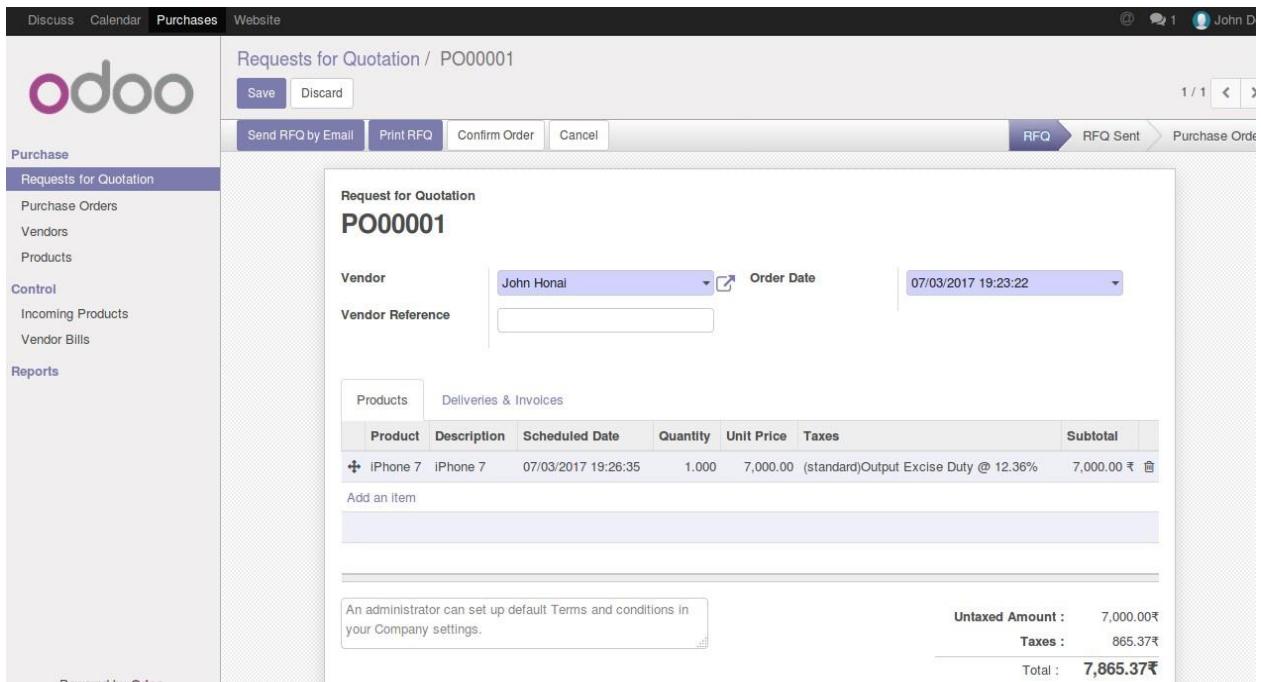
Purchase process starts from the purchase order and ends with the reception of good/service. In Odoo you can either directly create a purchase order (PO) or you can request for a quotation and create PO only after verifying the quote by the vendor. You can choose to go for Purchase Tender in case of competitive bidding. Anyway, every purchase will have a purchase order and the PO will generate an invoice, and depending on the contract with your supplier, you will be required to pay the invoice before or after delivery.

## **Quotation and Purchase Order**

### **Request for Quotation**

The quotation contains the details of the products which we want to purchase from our suppliers.

- Purchase > Request for Quotation > Create



- Select the **Supplier/Vendor**.
- The order date will be filled automatically, when we create the document.
- The scheduled date in order line specifies that when should we receive the products.

Under Deliveries & invoices Tab you can find other important fields like

Products	Deliveries & Invoices
Scheduled Date	09/15/2017 05:30:00
Deliver To	YourCompany: Receipts
Incoterm	Billing Status Payment Terms Fiscal Position Bills Received

Deliver To: Indicate delivery location (To know more about location refer inventory)

- Click Confirm Order to create new Purchase Order

Requests for Quotation / PO00001: 7,865.37 ₹

**Save** **Discard**

**Send PO by Email** **Receive Products** **Cancel** **Lock** **RFQ** **RFQ Sent**

**Purchase Order**  
**PO00001**

**Vendor** John Honai **Order Date** 07/03/2017 19:23:22  
**Vendor Reference**

**Products** **Deliveries & Invoices**

Product	Description	Scheduled Date	Quantity	Unit Price	Taxes	Subtotal
iPhone 7	iPhone 7	07/03/2017 19:26:35	1.000	7,000.00 (standard)	Output Excise Duty @ 12.36%	7,000.00 ₹

Add an item

**Shipments** 1 Shipment **Vendor Bills** 0 Vendor Bills

Click the '**Receive Products**' button,

- For receiving the products, the user must be an Inventory Manager.
- The same process can be done via Inventory module too. All the Purchase orders will be listed in inventory section.
- You can view the Shipment status from “Shipments” button

Purchase Orders / PO00001: 7,865.37 ₹ / WH/IN/00001

**Edit** **Create** **Print** **Action** 1 / 1

**Cancel** **Draft** **Waiting Availability** **Partially Available** **Available**

**WH/IN/00001**

**Partner** John Honai **Scheduled Date** 07/03/2017 19:26:35  
**Source Document** PO00001

**Operations** **Initial Demand** **Additional Info**

Product	To Do	Done
iPhone 7	1.000	0.000

# Vendor Bill

To create a Bill corresponding to a sale order

- **Sales -> Control -> Vendor Bills -> Create**

The screenshot shows the 'Purchase Orders / PO00001: 7,865.37 ₹ / Vendor Bills / New' screen. At the top, there are buttons for Save, Discard, Validate, Cancel Bill, and Draft. The main area is titled 'Draft Bill' and contains fields for Vendor (John Honal), Source Document (PO00001), Vendor Reference, Bill Date, Add Purchase Order, Due Date, and a Tax table.

Product	Description	Quantity	Unit Price	Discount (%)	Taxes	Amount
iPhone 7	PO00001: iPhone 7	1.000	7,000.00	0.00	(standard)Output Excise Duty @ 12.36%	7,000.00 ₹

Below the table, there is a section for 'Add an item' with a text input field. At the bottom, there are tabs for Tax Description, Tax Account, and Amount, with an Untaxed Amount of 7,000.00 ₹.

- Choose vendor and sale order from drop down list.
- The bill undergoes three stages namely 'Draft', 'open', 'Paid' for better control over the bill. Admin can set different user to validate those stages

# Creating Backorder

When we have fewer products to receive than the ordered, we can create backorders. In order to create a backorder, first, we have to sign in as an inventory user.

- **Purchase -> Purchase order**
- Select your purchase from list and Click <Shipment> button
- Click <Edit>

Purchase Orders / PO00002: 78,653.68 ₹ / WH/IN/00002

Save Discard 1

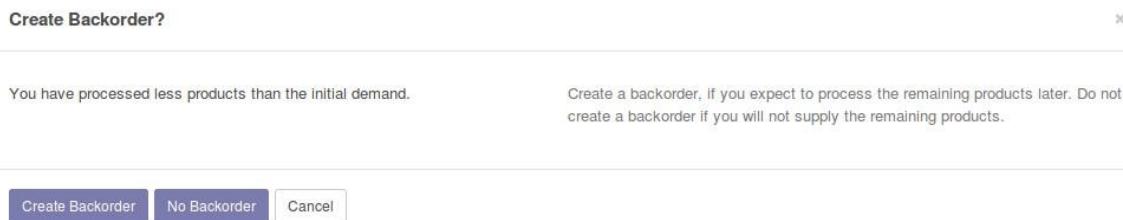
Validate Print Cancel Draft Waiting Availability Partially Available Available

## WH/IN/00002

Partner	John Honai	Scheduled Date	07/03/2017 19:44:19
		Source Document	PO00002

Operations	Initial Demand	Additional Info
<b>Product</b>	<b>To Do</b>	<b>Done</b>
iPhone 7	10.000	4.000
Add an item		

- In the 'Done' column, we can enter the number of products which we need to receive this time. If you enter less number of products than in the form then a wizard will appear asking you to confirm creating the backorder.



## Purchase Analysis

Just like in the sales there are several analysis tools available in purchase module. Under the **Reports** menu, we can analyze the purchase and suppliers.

The screenshot shows the Odoo Purchase Analysis dashboard. At the top, there's a header with the title "Purchase Analysis" and a "Measures" dropdown menu with three icons: a magnifying glass, a cross, and a download. Below the header is a tree view of purchase data categories:

- Total
- July 2017
- + iPhone 7
  - Analytic Account
  - Commercial Entity
  - Company
  - Currency
  - Date Approved
  - Fiscal Position
  - Order Date
  - Order Status
  - Partner Country
  - Product
  - Product Category
  - Product Template
  - Reference Unit of Measure
  - Responsible
  - Vendor
  - Warehouse
- Total
- John Honal
- + My Company

To the right of the tree view is a detailed table for the iPhone 7 category. The table has two columns: a label column and a value column. The data is as follows:

	Average Price
Commercial Entity	7,000.00
Company	7,000.00
Currency	7,000.00
Date Approved	7,000.00

## Vendor management

Since Odoo sales and Purchase module is associated with CRM, there is no separate vendor management in purchase, rather it access Partner management subsystem just like in the Sales module. Using this module we can add persons or entities to our system who can act either as **Customer** or **Vendor** or Both. In purchase module we can access this module under **Purchase > Vendor** tab.

To see detailed vendor/Partner management operations, Refer CRM module.

# Product Management

To Purchase any product, we must create a product in our system. Though it is an activity done under inventory management, Oddo Purchase module provide a quick link under **Purchase > Products** tab to perform product management functions like Add Product Update Stock etc. To see the full functionality and processes in Product Management refer Inventory management module.

## Other Useful configurations

### Purchase Tenders

The purchase tender or call for bids facility can be used in situations where we have a list of products to buy and multiple suppliers for that products. By using purchase tenders, we can get the best offer for the products. We will send the purchase tender to multiple suppliers and they will compete with each other and best offer will win. We will get the best offer. For enabling purchase tenders, go to

- **Purchase -> Settings**

#### Calls for Tenders

- Purchase propositions trigger draft purchase orders to a single supplier
- Allow using call for tenders to get quotes from multiple suppliers (advanced)

- Select the call for tender's option.

After this option is enabled, we can see two new menu items,

**'Purchase Agreement Types'** and **'Purchase Agreements'**.

The purchase agreement type menu can be used to create the agreement types.

## Create Purchase Tender

- Purchase -> Purchase Agreements -> Create

The screenshot shows the 'Purchase Agreements' interface for creating a tender. At the top, there are buttons for 'Confirm', 'Cancel Call', 'Draft' (highlighted in blue), 'Confirmed', 'Bid Selection', and 'Done'. The tender ID 'TE00004' is displayed prominently. Below it, the 'Responsible' field is set to 'Administrator', 'Agreement Type' is 'Purchase Tender', and 'Vendor' is listed. The 'Agreement Deadline' is 08/05/2017 11:11:44. The 'Ordering Date', 'Delivery Date', and 'Source Document' fields are empty. A table below lists a single product: 'iPhone-7' with a quantity of 1.000, ordered quantities of 0.00, and a unit price of 0.00. There is also a section for 'Terms and Conditions'.

- In the **Responsible** field, specify the person responsible for this tender.
- The **Agreement Deadline** field, select the date to bids are closed for suppliers.
- In the **Ordering Date** field, select the date to which you will place the order.

*Add the products and the quantity*

Now we can see some buttons appeared, new quotation, validate and RFQ/Orders.

The screenshot shows the 'Purchase Agreements' interface for creating a tender. At the top, there are buttons for 'New Quotation', 'Validate' (highlighted in blue), 'Cancel Call', 'Draft' (highlighted in blue), 'Confirmed', 'Bid Selection', and 'Done'. The tender ID 'TE00005' is displayed prominently. Below it, the 'Responsible' field is set to 'Administrator', 'Agreement Type' is 'Purchase Tender', and 'Vendor' is listed. The 'Agreement Deadline' is 08/05/2017 11:19:22. The 'Ordering Date', 'Delivery Date', and 'Source Document' fields are empty. A table below lists a single product: 'iPhone-7' with a quantity of 1.000, ordered quantities of 0.00, and a unit price of 0.00. To the right, a box indicates '0 RFQs/Orders'. There is also a section for 'Terms and Conditions'.

- Clicking on New Quotation will redirect us to the quotation creation form.
- Once we validate the tender, it will go to the stage ‘Bid Selection’. Go to the RFQ which we want to proceed with and confirm the order.
- Now go back to the tender and close the tender by clicking on the button ‘Done’.

## Purchase Approval

This feature allows us to set multiple levels of approval for the purchase orders. If this feature is enabled, for every purchase order the user creates, approval from the manager is required to confirm the order. If the user creates a quotation and confirms it, it will go to a waiting approval state. The purchase manager can then approve or reject it.

<b>Levels of Approvals *</b>	<input type="radio"/> Confirm purchase orders in one step <input checked="" type="radio"/> Get 2 levels of approvals to confirm a purchase order
<b>Double validation amount *</b>	500 00 <span style="float: right;">₹</span>

# Inventory Management

Inventory is the heart of the business, it is from here all other parts of the business get sufficient energy to live. If properly managed, the business remains healthy, otherwise always messy. Odoo inventory management is a resourceful module which can be utilized by any business organization irrespective of their size. It is designed in such a flexible manner. Odoo inventory is fully integrated with other applications, such as Purchase, Sales or Inventory. But is not limited to those processes, it is also fully integrated with our e-Commerce, Manufacturing and Repairs applications [8]. To Access inventory and warehouse management module in your ERP, you have to install ‘Inventory Management’ app from Odoo.

Odoo inventory management makes a worthy product to use because of the following features.

- **Clean and Fast**

Odoo Double entry inventory management, flexible design, modern user interface, mobile control and tracking mechanisms make Odoo a clean and fast performing ERP.

- **Basic operation support**

Prepare delivery order in simple steps, control and manage incoming shipments, prepare inventory counts (cycle counts), multiple location management, barcode-based packing, efficient scrap management, stock transfer option etc. Odoo support all the basic and advanced operations takes place in a warehouse.

- **Advanced Routing**

Odoo advanced routing support operations like

- Drop-shipping***

Deliver to customers straight from your supplier based on products, orders or customers.

- Cross-Docking***

Unload incoming material and directly transfer to outbound gates with little to no storage in between.

- Put away & Removal strategies***

Define your own storage and removal strategies; FIFO, nearest available zone, LIFO, etc.

- Pick - Pack - Ship***

Design your own order process flow. Deliver to customers in one step (delivery order) or several steps: picking, packing, and shipping.

- Push & Pull Routes***

Design your own product routes to automate transfer orders between warehouses or locations.

## ***Multi-Warehouses***

Manage all your warehouses with the same system and define replenishment rules between warehouses.

- **Replenishments**

To keep your inventory properly replenished, Odoo provides options like

### ***Minimum Stock***

Have proposition of purchase orders (or request for quotations) created by Odoo based on your future stock forecast.

### ***Purchase Propositions***

Get purchase order propositions based on supplier lead times, product demand and inventory forecasts.

### ***Make-to-Order***

Purchase raw materials or manufacture products to order. Define your own routes specific to warehouses, products, orders, etc.

### ***Request for Quotations***

Want to negotiate a price with suppliers every time you buy a specific product? Odoo can trigger request for quotations automatically based on future needs.

- **Traceability**

Tracking your product inside and outside the inventory is a challenging task. But Odoo traceability features like '*Lots Tracking*', '*Activity Log*', '*Serial Numbers*', '*Perpetual valuation*' make it easier for you.

- **Product Management Features**

### ***Product Types***

Odoo supports several product types that have different behavior: physical products, consumables, services, digital products.

### ***Kits***

Odoo's kitting features allows your salesperson to sell a kit, but you will deliver a set of products.

### ***Custom fields***

Add as many custom fields as you want on products to handle your business needs.

### ***Multi-Level Variants***

Define multiple level variants in just a few clicks. Create matrix based on colors, sizes, attributes, etc.

### ***Multiple unit of measures***

Odoo supports multiple unit of measures and converts automatically for you: buy a pallet of beer, sell packs of beers.

### ***Expiration Dates***

Track expiration dates on products.

### ***Multiple barcodes***

Create custom barcodes with specific codes to implement desired behaviors, such as a specific promotion.

- **Business intelligence**

The capability of Odoo BI and reporting tools are already explained in many modules. Odoo BI tools perform similar admirable jobs here in Manufacturing module by providing reports like inventory forecast, customer transaction drilldown reports, perpetual inventory valuation reports etc. [9]

If we compare Odoo Inventory with proprietary ERP Microsoft Dynamics, we can find many features like Freight Carrier Integration, Consignee stock management, etc. are not available there. And if the comparison is between SAP and Odoo, Odoo has the advantage of features like multiple variant support, Up and Down traceability, more effective barcode support etc.[10]

Before going to the detailed operations of Odoo inventory management, let's first explore some of the terms used in the modules. It will give you a better understanding about working Odoo Inventory management system.

**Warehouse:** A warehouse in Odoo is a location where you store products. It is either a physical or a virtual warehouse. It could be a store or a repository.

**Location:** Locations are used to structure storage zones within a warehouse. In addition to internal locations (your warehouse), Odoo has locations for suppliers, customers, inventory loss counter-parts, etc.

**Lots:** Lots are a batch of products identified with a unique barcode or serial number. All items of a lot are from the same product. (E.g. a set of 24 bottles) Usually, lots come from manufacturing order batches or procurements.

**Serial Number:** A serial number is a unique identifier of a specific product. Technically, serial numbers are similar to having a lot of 1 unique item.

**Unit of Measure:** Define how the quantity of products is expressed. Meters, Pounds, Pack of 24, Kilograms etc. Unit of measure of the same category (ex: size) can be converted to each other's (m, cm, mm) using a fixed ratio.

**Consumable:** A product for which you do not want to manage the inventory level (no quantity on hand or forecasted) but that you can receive and deliver. When this product is needed Odoo suppose that you always have enough stock.

**Stockable:** A product for which you want to manage the inventory level.

**Package:** A package contains several products (identified by their serial number/lots or not). Example: a box containing knives and forks.

**Procurement:** A procurement is a request for a specific quantity of products to a specific location. Procurement are automatically triggered by other documents: Sale orders, Minimum Stock Rules, and Procurement rules. You can trigger the procurement manually. When procurements are triggered automatically, you should always pay attention for the exceptions (e.g. a product should be purchased from a vendor, but no supplier is defined).

**Routes:** Routes define paths the product must follow. Routes may be applicable or not, depending on the products, sales order lines, warehouse, etc. To fulfill a procurement, the system will search for rules belonging to routes that are defined in the related product/sale order.

**Push Rules:** Push rules trigger when products enter a specific location. They automatically move the product to a new location. Whether a push rule can be used depends on applicable routes.

**Procurement Rules or Pull Rules:** Procurement rules describe how procurements on specific locations should be fulfilled e.g.: where the product should come from (source location), whether the procurement is MTO or MTS etc.

**Procurement Group:** Routes and rules define inventory moves. For every rule, a document type is provided: Picking, Packing, Delivery Order, Purchase Order etc. Moves are grouped within the same document type if their procurement group and locations are the same.

**Stock Moves:** Stock moves represent the transit of goods and materials between locations.

**Quantity On Hand:** The quantity of a specific product that is currently in a warehouse or location.

**Forecasted Quantity:** The quantity of products you can sell for a specific warehouse or location. It is defined as the Quantity on Hand - Future Delivery Orders + Future incoming shipments + Future manufactured units.

**Reordering Rules:** It defines the conditions for Odoo to automatically trigger a request for procurement (buying at a supplier or launching a manufacturing order). It is triggered when the forecasted quantity meets the minimum stock rule.

**Cross-Dock:** Cross-docking is a practice in the logistics of unloading materials from an incoming semi-trailer truck or railroad car and loading these materials directly into outbound trucks, trailers, or rail cars, with no storage in between. (Does not go to the stock, directly from incoming to packing zone)

**Drop-Shipping:** move products from the vendor/manufacturer directly to the customer (could be retailer or consumer) without going through the usual distribution channels. Products are sent directly from the vendor to the customer, without passing through your own warehouse.

**Removal Strategies:** the strategy to use to select which product to pick for a specific operation.  
Example: FIFO, LIFO, FEFO.

**Put away Strategies:** the strategy to use to decide in which location a specific product should be set when arriving somewhere. (Example: cables goes in rack 3, storage A)

**Scrap:** A product that is broken or outdated. Scrapping a product removes it from the stock. [11]

**Product variant:** Basically, we have two methods to add a product. Product with “Variant” option and standalone product. For example, if you want to add two products say iPhone 7 black, iPhone7 white, to your system. Here you may add two different products or two variants under a single product. Definitely later is the convenient method. To enable this feature, see the topic configurations.

# Manage Product

- Inventory > Inventory control > Product > Create

Products / New

Save Discard

Update Qty On Hand | Procurement Request |

 <b>Product Name</b> <b>Product Name</b>	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Unpublished On Website	<input type="checkbox"/> 0 On Hand
<input checked="" type="checkbox"/> Can be Sold	<input checked="" type="checkbox"/> 0 Forecasted	<input type="checkbox"/> Traceability	<input checked="" type="checkbox"/> 0 Reordering R...
<input checked="" type="checkbox"/> Can be Purchased	<input type="checkbox"/> Bill of Materials	<input type="checkbox"/> 0 Manufacturing	<input type="checkbox"/> Procurements
<input type="checkbox"/> Can be Expensed	<input type="checkbox"/> 0 Purchases	<input type="checkbox"/> \$ 0 Sales	
<input type="button" value="General Information"/> <input type="button" value="Inventory"/> <input type="button" value="Sales"/> <input type="button" value="Variants"/> <input type="button" value="Invoicing"/> <input type="button" value="Notes"/>			
Product Type	Stockable Product	Sale Price	1.00
Internal Reference		Cost	0.00
Barcode		Control Purchase Bills	<input checked="" type="radio"/> On ordered quantities <input checked="" type="radio"/> On received quantities
HS Code			
Internal Category	All		

All the fields under this form is very important

- **Can be sold** -> Tick this and the product will be listed in sales
- **Can be Purchased** -> tick this and the product will be listed in purchase
- **Can be Expensed** -> if the product is for Internal usage
- **Product type** -> whether the product is **Stackable, Consumable, or Service**

## Fields Under inventory Tab

 <b>iMac</b>	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Published On Website	<input type="checkbox"/> 0 On Hand
<input checked="" type="checkbox"/> Can be Sold	<input checked="" type="checkbox"/> 0 Forecasted	<input type="checkbox"/> Traceability	<input checked="" type="checkbox"/> 0 Reordering R...
<input checked="" type="checkbox"/> Can be Purchased	<input type="checkbox"/> Bill of Materials	<input type="checkbox"/> 0 Manufacturing	<input type="checkbox"/> Purchases
<input type="checkbox"/> Can be Expensed	<input type="checkbox"/> \$ 0 Sales		
<input type="button" value="General Information"/> <input type="button" value="Inventory"/> <input type="button" value="Sales"/> <input type="button" value="Variants"/> <input type="button" value="Invoicing"/> <input type="button" value="Notes"/>			
Routes	<input type="checkbox"/> Buy	Weight	9.54
	<input type="checkbox"/> Manufacture	Tracking	No Tracking
	<input type="checkbox"/> Make To Order	Volume	0.00
Procurement	Create a draft purchase order		

## Vendors

Vendor	Minimal Quantity	Price	Start Date	End Date
ASUSTeK	5.00	1,299.00		
Campnocamp	1.00	1,399.00		

- **Routes:** - The way which your company acquire this product.
- **Vendor:** - Under this section you can add the Vendors (suppliers) of this product
- **Tracking:** - internal tracking mechanism, either via Lot no or via Serial number

### Fields under Sales Tab

The screenshot shows the Sales tab selected in a navigation bar. On the left, there's a sidebar with 'Website' sections: 'Website Categories' (listing 'Computers / Computer all-in-one'), 'Alternative Products' (listing '[E-COM08] Apple In-Ear Headpho...'), 'Accessory Products' (listing 'Display Nothing'), 'Availability', and 'Styles'. On the right, 'Sale Conditions' are listed: 'Warranty' (0.00 months), 'Customer Lead Time' (0.00 days), and other tabs like 'Variants', 'Invoicing', and 'Notes' are visible at the top.

**Website Categories:** - here you can specify the category under which the product should be displayed in E-commerce website

**Alternative/Accessory Product:** - associated product to list in Website

**Under product Variant tab, as we mentioned earlier, you can add variants of this Products.**

- Click <Add an Item>
- add an Attribute for ex: color
- then add attribute Values

Based on the Attributes and values you provided, system will generate all combinations of variations under “Variants Button”.

The screenshot shows the Variant tab. At the top, there are buttons for 'Variant Prices', 'Update Qty On Hand', and 'Procurement Request'. Below is a product card for 'bjb' with a camera icon. It lists attributes: 'Can be Sold' (checked), 'Can be Purchased' (checked), and 'Can be Expensed' (unchecked). To the right is a grid of status indicators:

Active	Unpublished On Website	2 Variants
0 On Hand	0 Forecasted	Traceability
0 Reordering R...	0 Bill of Materials	0 Manufacturing
Procurements	Purchases	\$ 0 Sales

Like this

	Internal Reference	Name	Attributes	Sale Price	Quantity On Hand	Forecast Quantity	Barcode
<input type="checkbox"/>		bjb	Memory: 16 GB	1.00	0.000	0.000	
<input type="checkbox"/>		bjb	Memory: 32 GB	1.00	0.000	0.000	

- You may delete any variant you don't have.
- Follow Variant Price tab to adjust prices of all variants

**Note:** - *You can update inventory attributes like Quantity in Hand and Procurement request etc. from the same window*

**Note:** - *You can Update/Delete a product information from same menu i.e. Inventory > Inventory control > Product*

## General Configurations

- **Inventory> Configuration> Settings> Products**

### Products

Units of Measure	<input type="radio"/> Products have only one unit of measure (easier) <input checked="" type="radio"/> Some products may be sold/purchased in different units of measure (advanced)
Product Variants	<input type="radio"/> No variants on products <input checked="" type="radio"/> Products can have several attributes, defining variants (Example: size, color,...)
Packaging Methods	<input type="radio"/> Do not manage packaging <input checked="" type="radio"/> Manage available packaging options per products

- **Unit of Measure:** By ticking the second option you can Sale/Purchase products in a different unit of measure. For example, you may buy Bottle as a dozen and sell it individually.
- **Product Variant:** - Tick here to include product variance in inventory.

- **Inventory> Configuration> Settings> Traceability**

## Traceability

Lots and Serial Numbers	<input type="radio"/> Do not track individual product items <input checked="" type="radio"/> Track lots or serial numbers
Expiration Dates	<input type="radio"/> Do not use Expiration Date on serial numbers <input type="radio"/> Define Expiration Date on serial numbers
Packages	<input type="radio"/> Do not manage packaging <input type="radio"/> Record packages used on packing: pallets, boxes, ...
Product Owners	<input type="radio"/> All products in your warehouse belong to your company <input type="radio"/> Manage consignee stocks (advanced)
Barcode Interface	<input type="checkbox"/> Barcode scanner support <span style="background-color: #4F81BD; color: white; padding: 2px 5px;">Enterprise</span> <a href="#">More Info</a>

➤ **Lots and Serial Numbers:** - This field specify how you track your item in inventory.

- **Inventory> Configuration> Settings> Location and Warehouse**

## Location & Warehouse

Procurements	<input checked="" type="radio"/> Reserve products immediately after the sale order confirmation <input type="radio"/> Reserve products manually or based on automatic scheduler
Warehouses and Locations usage level	<input type="radio"/> Manage only 1 Warehouse with only 1 stock location <input type="radio"/> Manage only 1 Warehouse, composed by several stock locations <input checked="" type="radio"/> Manage several Warehouses, each one composed by several stock locations
Routes	<input type="radio"/> No automatic routing of products <input checked="" type="radio"/> Advanced routing of products using rules Minimum days to trigger a propagation of date change in pushed/pull flows: <input type="text" value="0"/>
Products	Decimal precision on weight <input type="text" value="0"/>
Dropshipping	<input checked="" type="radio"/> Suppliers always deliver to your warehouse(s) <input type="radio"/> Allow suppliers to deliver directly to your customers
Picking Waves	<input checked="" type="radio"/> Manage pickings one at a time <input type="radio"/> Manage picking in batch per worker
Minimum Stock Rules	<input checked="" type="radio"/> Set lead times in calendar days (easy) <input type="radio"/> Adapt lead times using the suppliers' open days calendars (advanced)
Warning	<input checked="" type="radio"/> All the partners can be used in pickings <input type="radio"/> An informative or blocking warning can be set on a partner

- **Procurement:** - choose the method to **Reserve** a product, after a sale order is confirmed. In second option you can set a scheduler to reserve product
- **Warehouses and Location level:** - Choose according to your usage level
- **Routes:** - Choose advanced routing, if your procurement contain more than one step
- **Drop shipping:** - this allows you to configure different delivery option for your suppliers.

# Dashboard

Dashboard give a glimpse to all the operations in your Warehouses.

The dashboard is divided into six main sections:

- Receipts YourCompany**: Shows 0 transfers.
- Internal Transfers YourCompany**: Shows 0 transfers.
- Pick YourCompany**: Shows 0 transfers.
- Pack YourCompany**: Shows 1 Transfer (Late), 1 Ready, and 1 Waiting.
- Delivery Orders YourCompany**: Shows 1 To Do (Waiting Late), 2 Ready, and 3 Waiting.
- Receipts My Company, Chicago**: Shows 0 To Receive.

- Click <More> to view all the operations in the warehouse

## Inventory -> Operations -> All Transfers

Stock Operations						
	Reference	Destination Location Zone	Partner	Scheduled Date	Source Document	Back Order of Status
<input type="checkbox"/>	Chic/IN/00004	Chic/Stock	ASUSTeK	08/01/2017 17:05:58	chicago_warehouse	Available
<input type="checkbox"/>	WH/OUT/00003	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:54	outgoing shipment your_company warehouse	Draft
<input type="checkbox"/>	WH/OUT/00005	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:54	outgoing shipment	WH/OUT/00002 Done
<input type="checkbox"/>	WH/OUT/00002	Partner Locations/Customers	ASUSTeK		outgoing shipment	Draft
<input type="checkbox"/>	WH/OUT/00001	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:53	outgoing shipment main_warehouse	Available
<input type="checkbox"/>	WH/IN/00002	WH/Stock	ASUSTeK	08/01/2017 17:05:55	incoming_shipment	Available
<input type="checkbox"/>	WH/IN/00001	WH/Stock		08/01/2017 17:05:55	incoming_shipment for test	Draft
<input type="checkbox"/>	WH/OUT/00004	Partner Locations/Customers	ASUSTeK	08/01/2017 17:05:55	your company warehouse	Draft
<input type="checkbox"/>	WH/IN/00004	WH/Stock	ASUSTeK	08/01/2017 17:05:56	incoming_shipment your_company warehouse	Available
<input type="checkbox"/>	WH/IN/00003	WH/Stock	ASUSTeK	08/01/2017 17:05:56	incoming_shipment main_warehouse	Available
<input type="checkbox"/>	Chic/IN/00002	Chic/Stock	ASUSTeK	08/01/2017 17:05:57	incoming_shipment_chicago_warehouse	Done

- You can see all confirmed Sales and Purchase orders listed here.
- You can click and view the status of each one.

Print ▾ Attachment(s) ▾ Action ▾

Mark as Todo Validate Cancel Draft Waiting Availability Partially Available Available Done

**WH/OUT/00003**

Partner	ASUSTeK	Scheduled Date	08/01/2017 17:05:54
Destination Location Zone	Partner Locations/Customers	Source Document	outgoing shipment your_company warehouse
Initial Demand		Additional Info	
Product	Quantity	Unit of Measure	Status
[PROD_DEL02] Datacard	45.000	Unit(s)	New

## Warehouse Configuration

You can add any number of warehouses under your company. As we mentioned earlier we can have multiple warehouses.

- **Inventory > Configuration > Warehouse Management > Warehouses ->Create**

Warehouse Name

Short Name Address

Warehouse Configuration

Incoming Shipments

- Receive goods directly in stock (1 step)
- Unload in input location then go to stock (2 steps)
- Unload in input location, go through a quality control before being admitted in stock (3 steps)

Outgoing Shipments

- Ship directly from stock (Ship only)
- Bring goods to output location before shipping (Pick + Ship)
- Make packages into a dedicated location, then bring them to the output location for shipping (Pick + Pack + Ship)

Purchase to resupply this warehouse

Default Resupply Warehouse

Resupply Warehouses

YourCompany  
My Company, Chicago  
Chicago Warehouse

Choose **Incoming Shipment** and **Outgoing Shipment** settings, you can choose any of your existing warehouses for **Resupply**. <Save> it and <Activate> it.

**Note:** - you can Update/Delete this Warehouse details from same menu i.e. **Inventory > Configuration > Warehouse Management > Warehouses**.

# Locations

Locations are different places in your warehouse. Or these are the different sections in your warehouse where different types of actions are done. You can add single or multiple locations. A location means a space in the warehouse, a shelf, a floor, etc. A location is part of one warehouse and it is not possible to link to another warehouse. Actually all In and Out transactions are carried out and Recorded through Locations. (If you look into Purchase order, you can see **Deliver to** option, which essentially indicate a location)

There are three types of location

- Physical Location
  - These are Locations in your warehouse
- Partner Location
  - This location not under your warehouse
- Virtual Location
  - This is a virtual location which is not available physically

You can view all the locations available under your company from

- **Inventory -> Configurations -> Locations**

Locations		Internal	Search...	Filters	Group By	Favorites	1-12 / 12	<	>
<input type="checkbox"/>	Display Name								
<input type="checkbox"/>	Chic/Stock								
<input type="checkbox"/>	My Co/Stock								
<input type="checkbox"/>	WH/Input/Order Processing								
<input type="checkbox"/>	WH/Input/Order Processing/Dispatch Zone								
<input type="checkbox"/>	WH/Input/Order Processing/Dispatch Zone/Gate A								
<input type="checkbox"/>	WH/Input/Order Processing/Dispatch Zone/Gate B								
<input type="checkbox"/>	WH/Output								
<input type="checkbox"/>	WH/Packing Zone								
<input type="checkbox"/>	WH/Stock								
<input type="checkbox"/>	WH/Stock/Shelf 1								
<input type="checkbox"/>	WH/Stock/Shelf 2								
<input type="checkbox"/>	WH/Stock/Shelf 2/Small Refrigerator								

## Create a Location

- **Inventory > Configurations > Locations > Create**

The screenshot shows the 'Locations / New' creation form in Odoo. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'Location Name' field, which is highlighted with a blue selection bar. To the right of the name field are three filter buttons: 'Active' (with a folder icon), 'Current Stock' (with a building icon), and 'Products' (with a funnel icon). The 'Parent Location' field is below the name field. The form is divided into several sections: 'Additional Information' (Location Type: 'Inventory Loss', Owner dropdown, checkboxes for 'Is a Scrap Location?' and 'Is a Return Location?'), 'Localization' (Corridor (X): 0, Shelves (Y): 0, Height (Z): 0, Barcode field), 'Accounting Information' (Stock Valuation dropdown, Account (Incoming) and Account (Outgoing) dropdowns), and 'Logistics' (Removal Strategy and Put Away Strategy dropdowns).

- **Parent location:** - in case you are creating a location under another location (location hierarchy)
  - **Owner:** - Choose a user to manage it
- Fill all other necessary fields and click <Active> and <Save>

**Note:** you can Update/delete a Location information from the same menu.

## Operations

Operation means, different operations carried out in your ware house like Receipts, Internal Transfer, and Delivery Order. These are basic operations carried out in a warehouse. However, you can add more custom operations from

- **Inventory -> Configuration -> warehouse management -> Operation Types -> Create**

The screenshot shows the 'Operation Types -> Create' configuration screen. At the top right is a button labeled 'Active'. Below it are fields for 'Picking Type Name' (with a dropdown menu), 'Reference Sequence' (dropdown), 'Warehouse' (dropdown set to 'YourCompany'), 'Type of Operation' (dropdown set to 'Customers'), and 'Picking Type for Returns' (dropdown). The 'Packs and Lots' section contains checkboxes for 'Create New Lots/Serial Numbers' and 'Use Existing Lots/Serial Numbers'. The 'Locations' section contains dropdowns for 'Default Source Location' (set to 'WH/Stock') and 'Default Destination Location' (set to 'Partner Locations/Customers').

- Fill the operation details and click <**Activate**> and <**Save**> now these operation will be listed in your Dashboard.

## Routes

it is the different possible ways through which a product is acquired or sold from your warehouse. You can simply follow single step process (like vendor's warehouse to your warehouse) or can configure multiple step routs. You can see a field asking the Rout while creating a Product. Rout ensures a sale or purchase product is properly tracked.

You can view all the Routes from

- **Inventory > Configuration > Routes**

Routes		Search...		1-8 / 8
	Create Import	Filters Group By Favorites		
<input type="checkbox"/>	Route Name			
<input type="checkbox"/>	+ Buy			
<input type="checkbox"/>	+ My Company, Chicago: Receipt in 1 step			
<input type="checkbox"/>	+ My Company, Chicago: Ship Only			
<input type="checkbox"/>	+ Chicago Warehouse: Receipt in 1 step			
<input type="checkbox"/>	+ Chicago Warehouse: Ship Only			
<input type="checkbox"/>	+ YourCompany: Pick + Pack + Ship			
<input type="checkbox"/>	+ Make To Order			
<input type="checkbox"/>	+ YourCompany: Receipt in 1 step			

You may define new Rout rules from

- **Inventory > Configuration > Routes > Create**

**Route Name**  
**YourCompany: Pick + Pack + Sh** Active

**Applicable On**  
Select the places where this route can be selected

Product Categories	<input checked="" type="checkbox"/>	Warehouses	<input type="checkbox"/>
Products	<input type="checkbox"/>	YourCompany	<input type="checkbox"/>
Sale Order Lines	<input type="checkbox"/>	Sale Order Lines	<input type="checkbox"/>

**Push Rules**

Source Location	Destination Location	Operation Name
Add an item		

**Procurement Rules**

Name	Action	Picking Type
WH: Output -> Customers	Move From Another Location	YourCompany: Delivery Orders
WH: Packing Zone -> Output	Move From Another Location	YourCompany: Pack
WH: Stock -> Packing Zone	Move From Another Location	YourCompany: Pick
Add an item		

- Tick **Product categories** to view the Rule in Product category also
- Choose the Ware house
- Click **Add an Item** to add new Rule.

**Open: Procurement Rules**

**Name**  
**WH: Packing Zone -> Output** Active

Action	<b>Move From Another Location</b>	Sequence
		20

**Applied On**

Procurement Location	WH/Output
----------------------	-----------

**Creates**

Source Location	WH/Packing Zone
Move Supply Method	Create Procurement
Picking Type	YourCompany: Pack
Partner Address	
Delay	0 days

Here the **Action** Indicate exact physical action done. (In this picture it is, 'Move from Another Location', consequently you have to fill source and destination Locations.)

Or you can choose **Buy**

The screenshot shows the 'Procurement Rules' interface. A rule named 'WH: Packing Zone -> Output' is selected. The 'Action' field is set to 'Buy'. Other fields include 'Sequence' (20), 'Applied On' (Procurement Location: WH/Output), 'Creates' (Picking Type: YourCompany: Pack), and buttons for 'Save' and 'Discard'.

- Save the Rule and add another Rule if needed. Otherwise click <active> and <save> Route.

## Unit of Measure

Different products have different unit of measure. You can Configure all these unit of measures to you inventory.

- **Inventory > Configurations > Unit of Measure > Create**

The screenshot shows the 'Unit of Measure / cm' configuration screen. Fields include:
 

- Unit of Measure:** cm
- Category:** Length / Distance
- Type:** Smaller than the reference Unit of Measure
- Ratio:** 100.0000
- Active:** checked
- Rounding Precision:** 0.01000

 A note at the bottom states: "e.g. 1 \* (reference unit) = ratio \* (this unit)".

- **Unit of Measure:** - Name of UM
- **Category:** - you may add new category or select from an existing one.

- **Type:** - here you have three options;

**Reference Unit-** Means, this will be the base unit for all units in this category (for example we can set **Meter** as base for length category.)

**Bigger than reference unit-** Example, if meter is reference unit the while you add KM you must choose this option

**Smaller than reference unit-** opposite of the above

- **Ratio:** - ratio between Reference unit and other unit

## Reordering Rules

You can create a custom Rule to replenish your Inventory automatically. For example, if you wish to re-order a product when the stock reaches 10 units. You can set a Rule, and when you **Run Scheduler** system will check this Rule and take appropriate action automatically.

- **Inventory > Inventory Control > Reordering Rules > Create**

Reordering Rules / New

Save Discard

Name	OP/00005	Warehouse	YourCompany
Product	[C-Case] Computer Case	Product Unit of Measure	Unit(s)
		Location	WH/Stock
		Procurement Group	
<b>Rules</b>		<b>Misc</b>	
Minimum Quantity	0.000	Lead Time	1 Day(s) to pur
Maximum Quantity	0.000		
Quantity Multiple	1.000		

- **Minimum Quality:** - minimum number of quantity should be kept in inventory
- **Maximum Quantity:** - Quantity upper limit
- **Quantity Multiple:** - Lowest number of items can be ordered at once
- **Procurement Group:** - Set procurement and Picking option

Create: Procurement Group

Reference	PG/000002	Procurements	Pickings
Delivery Type	Partial		
<input type="button" value="Save"/> <input type="button" value="Discard"/>			

- **Activate and Save the Rule.**

## Inventory Update

You can update stock details in two ways, first one is via going to product details and update individually. You can update multiple product details also.

- **Inventory > Inventory Adjustments > Create**

Inventory Adjustments / New

<input type="button" value="Save"/>	<input type="button" value="Discard"/>	<input type="button" value="Start Inventory"/>	Draft → In Progress → Validated												
<b>Annual Maintanance</b> <table border="1"> <tr> <td>Inventory Reference</td> <td>WH/Stock</td> <td>Inventory Date</td> <td>09/19/2017 11:00:29</td> </tr> <tr> <td>Inventory of</td> <td> <input checked="" type="radio"/> All products  <input type="radio"/> One product category  <input type="radio"/> One product only  <input type="radio"/> Select products manually  <input type="radio"/> One Lot/Serial Number         </td> <td>Force Accounting Date</td> <td><input type="text"/></td> </tr> <tr> <td>Include Exhausted Products</td> <td colspan="3"><input type="checkbox"/></td> </tr> </table>				Inventory Reference	WH/Stock	Inventory Date	09/19/2017 11:00:29	Inventory of	<input checked="" type="radio"/> All products <input type="radio"/> One product category <input type="radio"/> One product only <input type="radio"/> Select products manually <input type="radio"/> One Lot/Serial Number	Force Accounting Date	<input type="text"/>	Include Exhausted Products	<input type="checkbox"/>		
Inventory Reference	WH/Stock	Inventory Date	09/19/2017 11:00:29												
Inventory of	<input checked="" type="radio"/> All products <input type="radio"/> One product category <input type="radio"/> One product only <input type="radio"/> Select products manually <input type="radio"/> One Lot/Serial Number	Force Accounting Date	<input type="text"/>												
Include Exhausted Products	<input type="checkbox"/>														

- Give a Name, select the required products and click **Start Inventory**

Inventory Adjustments / Annual Maintenance

Edit Create Print Attachment(s) Action 4 / 4 < >

Validate Inventory Cancel Inventory Draft In Progress Validated

### Annual Maintenance

Inventoried Location	WH/Stock	Inventory Date	09/19/2017 11:04:41
Inventory of	All products	Force Accounting Date	
Include Exhausted Products	<input type="checkbox"/>		

Inventory Details

Product	UoM	Location	Lot/Serial Number	Theoretical Quantity	Real Quantity
[E-COM08] Apple In-Ear Headphones	Unit(s)	WH/Stock/Shelf 1		18.000	18.000
[E-COM10] Apple Wireless Keyboard	Unit(s)	WH/Stock/Shelf 1		21.000	21.000
[FURN004] Bolt	Unit(s)	WH/Stock		-4.000	-4.000
[E-COM05] Bose Mini Bluetooth Speaker	Unit(s)	WH/Stock/Shelf 2		8.000	8.000
[C-Case] Computer Case	Unit(s)	WH/Stock		7.000	7.000
[FURN001] Computer Desk	Unit(s)	WH/Stock		1.000	1.000
[PCSC234] Computer SC234	Unit(s)	WH/Stock		4.000	4.000
[PROD_DEL02] Datacard	Unit(s)	WH/Stock		15.000	15.000

- You can change the stock details by clicking over the product quantity.
- Commits the changes and click **<Validate>**

## Scrap

To record the scrap products in your inventory.

- **Inventory > Inventory Control > Scrap > Create**

Scrap / New

Save Discard Draft Done

### New

Product	[CONS_DEL01] Server	Location	WH/Stock
Quantity	1.00 Unit(s)	Scrap Location	Virtual Locations/Scrapped
		Source Document	
		Expected Date	09/19/2017 11:07:08

- Fill the Scrap product details and **Save**

## Scheduler

**Run Scheduler** will check all the **Reordering Rules** you created and make appropriate action.

- **Scheduler > Run Scheduler**

**Run Schedulers**

---

Compute all procurements in the background.

---

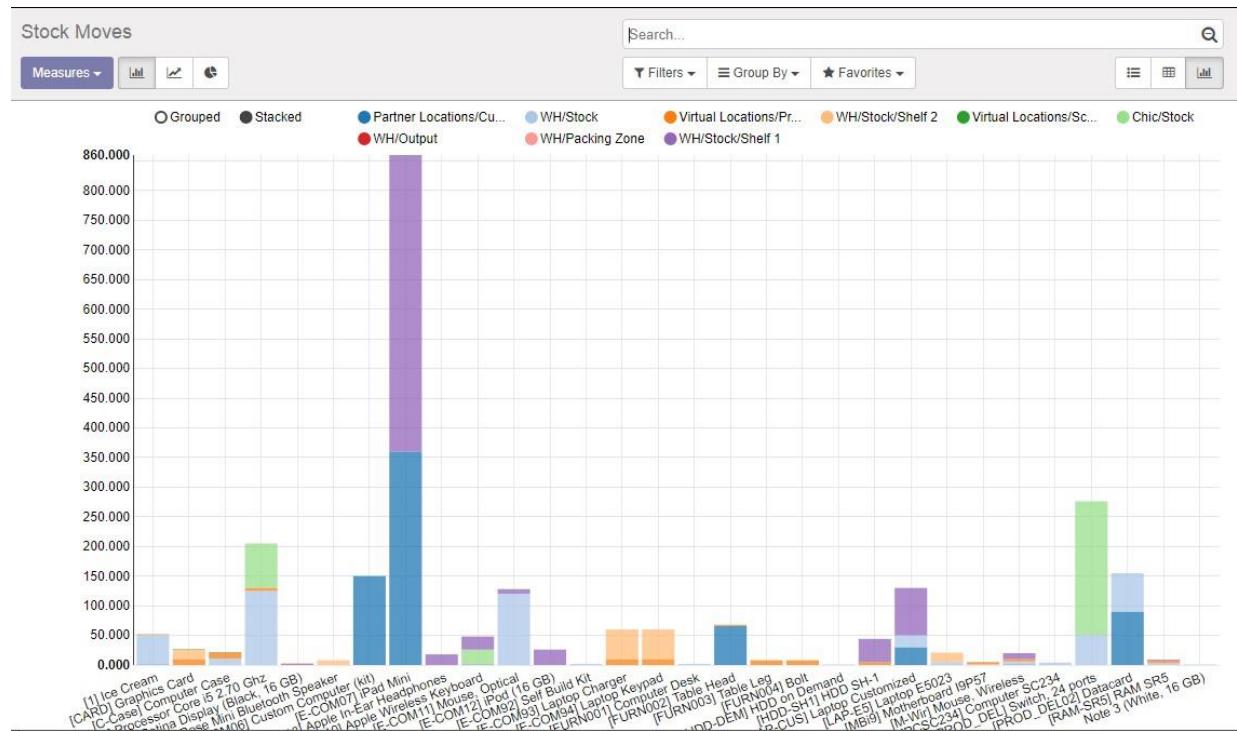
**Run Schedulers**   **Cancel**

- Click Run Scheduler

## Reports

Odoo inventory management system provides the user very effective and simple reports to make more wise decisions. You can access reports from

- **Inventory->Reports**



# Manufacturing

Manufacturing is a process of converting raw materials or components into finished goods or products. For a company which handle large quantity of manufacturing products have to track every manufacturing orders efficiently. The Manufacturing Module in Odoo help you to handle the complexity of Production, Manage Bills of Materials, Plan Manufacturing Orders, and Track Work Orders etc. Manufacturing module is one of the basic application in Odoo. You have to install ‘Manufacturing’ app from Odoo Apps to avail this module on your ERP. Since the Manufacturing module is highly integrated with Inventory Management, you can keep your inventory automatically updated with each manufacturing process.

Working methodology is very simple in Odoo manufacturing. You can create a Manufacturing Order of a product and pass it through your different stages in production line and complete production. You may customize manufacturing procedure matching your company’s process using WorkCentre and routing concepts. You can easily manage ‘Scraps’ during any stage of manufacturing procedure and ‘Unbuild’ a manufactured product if needed. Organization may assign different level users to overlook the entire manufacturing procedure for effective management of entire process.

If we compare Odoo manufacturing module with other ERP solution, like in all other modules we can find lot of unique feature which Odoo alone have. For example, features like byproducts, routing facility, single BOM for multiple product variant, MRP II scheduler, Master production scheduler, Kanban Planning, Production calendar, backward scheduling, Work orders, Repair etc. Are not available in SAP ERP while Odoo implement all of them. And against Microsoft Dynamics, Odoo have the advantage of features like Equipment / Machine Management, Work Instructions on Work Orders, Maintenance Requests from Shop Floor Terminal, Production calendar etc. [12]

Following features [13] make Odoo manufacturing module an efficient one.

- **Manage**

*Manufacturing orders*

Manage your products into assembly lines or manual assembly.

*Work orders*

Launch production of items needed in the final assembly of your products.

*Repair orders*

Manage repairs of items under warranty or as a service.

- **Schedule & plan**

***Plan manufacturing***

Get a clear view on your whole planning and easily reschedule manufacturing.

***Organize work orders***

Have access to all available resources and plan ahead with your production.

***Manage Bill of Materials***

Keep track of availability of items in stock and production time.

***WorkCentre Capacity***

MRP II scheduler using capacities and schedules of WorkCentre.

- **Define Flexible Master Data**

***Create multi-level Bills of Materials***

Set a Bill of Materials within another in order to manufacture components of a product in another Bill of Materials.

***Optional routing***

Create new routings for work orders in order to sequence your production depending on the routing used.

***Version changes***

Allow your products to evolve and add configurable options when creating orders.

***Phantom of Bill of Materials***

Create phantom BoM to manufacture and sell products in kits or to build replacement parts.

- **Quality**

***Control Points***

Automatically trigger quality checks for the manufacturing department.

***Quality Checks***

Deploy your statistical process control easily with checks.

***Quality Alerts***

Organize your work using the Kanban view of quality alerts.

- **Maintenance**

***Preventive Maintenance***

Trigger maintenance requests automatically based on KPIs.

***Corrective Maintenance***

Trigger corrective maintenance directly from the control center panel.

***Calendar***

Schedule maintenance operations with a calendar.

### **Statistics**

Get all maintenance statistics computed for you: MTBF

- **WorkCentre Control Panel**

### **Tablets**

Set tablets on every work center to organize their work efficiently.

### **Record production**

Register productions, scan products, lots or serial numbers.

### **Worksheets**

Display worksheets directly on the WorkCentre with instructions for operator.

### **Misc. Operations**

Scrap products, create quality alerts, and perform checks, right from the WorkCentre.

### **Alerts**

Use alerts to show changes or quality checks to the operator. [13]

- **Business Intelligence**

Get detailed analysis report on your production line, analyze the performance of your work centers and production, plan alternative production strategies etc. are some of the qualitative measures Odoo BI engine can suggest to you in manufacturing module.

### **System Users**

By default there are two types of user in manufacturing modules.

- **Manager:** - He is the one who manages everything, including Create BOM, Work Order, Routing procedure etc.
- **User:** - Generally he can create a manufacturing order and process it. But manager can grant more permission to this user if needed.

## **Manufacturing Order Management**

There are two ways we can produce a product with Odoo manufacturing App. We can create a manufacturing order with simple default stages and complete the production. Or we can customize our work order by setting up work center and routing mechanisms.

## Create a Manufacturing Order (Simple Method)

- Manufacturing > Operations > Manufacturing Orders > Create

The screenshot shows the Odoo web interface for creating a manufacturing order. The left sidebar has 'Operations' selected, with 'Manufacturing Orders' highlighted. The main window title is 'Manufacturing Orders / MO/00001'. The top bar includes 'Edit', 'Create', 'Print', 'Action', and status indicators '1 / 1' and 'John Doe'. Below the title, buttons for 'Check availability', 'Produce', 'Cancel', 'Scrap', and a red 'Raw materials not available!' message. A progress bar at the top right shows 'Confirmed' (blue), 'In Progress' (orange), and 'Done' (green). The main content area displays 'MO/00001' with product details: iPhone 7, Quantity To Produce: 1.000, Deadline Start: 07/03/2017 09:11:21, Responsible: John Doe, and Bill of Material: iPhone 7. Below this are tabs for 'Consumed Materials', 'Finished Products', and 'Miscellaneous'. A table shows consumed materials: iPhone components with 0.000 quantity available, 1.000 to consume, and 0.000 consumed.

- Choose a product from list (or you may create new one)
- Choose Bill of Material
- Finished product tab will show you the number of finished products.
- Consumed Material tab will display the material consumed for the production
- Click "Check availability" to see the availability of raw materials in inventory.

## Manage Production

Once you have created and confirmed a Manufacturing order, you can start production. Odoo will list all the Manufacturing orders under **Manufacturing -> Operations -> Manufacturing Orders**. You can view the status of all ongoing manufacturing order from here.

Reference	Deadline Start	Product	Quantity	Availability	Routing	Source	State
MO/00009	09/16/2017 09:11:19	[LAP-CUS] Laptop Customized	1.000	Available	Custom Assembly Line		In Progress
MO/00007	09/15/2017 16:50:25	[E-COM92] Self Build Kit	1.000	Waiting	Manual Component's Assembly		Planned
MO/00005	09/15/2017 16:01:53	[PCSC234] Computer SC234	1.000	Waiting	Assembly Line 1		Planned
MO/00003	08/01/2017 17:12:05	[FURN001] Computer Desk	1.000	Waiting	Assemble Furniture		Confirmed
MO/00001	08/01/2017 17:12:03	[PCSC234] Computer SC234	3.000	Partially Available	Assembly Line 1		Planned
				7.000			

Select a Manufacturing Order from list.

Manufacturing Orders / MO/00002

Product	iPhone 7	Deadline Start	07/03/2017 13:51:04
Quantity To Produce	10.000	Responsible	John Doe
Bill of Material	iPhone 7	Source	
<b>Consumed Materials</b>	<b>Finished Products</b>	<b>Miscellaneous</b>	
Product	Quantity Available	To Consume	Consumed
iphone components	5.000	5.000	0.000
iphone components	5.000	5.000	5.000

Inventory Moves

- Since Odoo support negative inventory support you can start production even without ensuring the raw material availability.
- Click “Produce” to start production.

*Once you start production the status bar will change as follows*

Mark as Done	Post Inventory	Scrap	Unreserve	Confirmed	In Progress	Done
--------------	----------------	-------	-----------	-----------	-------------	------

- “Mark as Done” to complete the production process
- “Post inventory” to update inventory movements.

**Note:** - You can “**unreserve**” any raw material from manufacturing order to make it available to inventory, Click “**Unreserve**” button on progress Tab to take this action.

**Note:** - you can Update/Delete any manufacturing order from **Manufacturing -> Operations -> Manufacturing Orders Tab**.

## Create a Manufacturing Order (Advanced Method)

Comparing to simple method, advanced method provide each company to configure more detailed manufacturing process such as setting up **Work Centers**, **Routing**, **Work Order** management etc.

To enable this feature

- Manufacturing -> Settings -> Manufacturing Order

## Manufacturing Order

Product Variants	<input type="radio"/> No variants on products <input checked="" type="radio"/> Products can have several attributes, defining variants (Example: size, color,...)
By-Products	<input type="radio"/> No by-products in bills of materials (A + B --> C) <input checked="" type="radio"/> Bills of materials may produce residual products (A + B --> C + D)
Routings & Planning	<input type="radio"/> Manage production by manufacturing orders <input checked="" type="radio"/> Manage production by work orders

- Enable 'Manage Production By Work Orders'

This will enable new menu in dashboard to manage Work Center, Routing and Work Order.

- Manufacturing -> Operations -> Manufacturing Order -> Create

The screenshot shows the 'Manufacturing Orders / New' screen. At the top, there are 'Save' and 'Discard' buttons. Below them is a toolbar with 'Cancel', 'Confirmed' (highlighted), 'In Progress', and 'Done'. The main area is titled 'New' and contains the following fields:

- Product: A dropdown menu.
- Quantity To Produce: A text input field containing '1.000' with a 'Update' button.
- Bill of Material: A dropdown menu.
- Deadline Start: A date picker set to '09/16/2017 10:59:14'.
- Responsible: A dropdown menu set to 'Administrator'.
- Source: An empty text input field.

Below these fields is a table with three tabs: 'Consumed Materials', 'Finished Products', and 'Miscellaneous'. The 'Consumed Materials' tab is selected, showing a single row with columns for Product, Quantity Available, To Consume, and Consumed. The 'To Consume' column has a value of '1.000'.

- Fill the fields same as before.
- Select a 'Routing' mechanism, this will be automatically filled once you choose the BoM.

*The Status bar will give you a new option **Create Work Order**, Click it to create the work order according to your routing plan*

- In new Window you will have an option to Check Availability of raw material. (Odoo support negative inventory)
- Click <Save>
- Unlike in simple method now you just created a **Work Order**, the production process has not started yet.

## Manage Production

To Start Production you have **two** option either

- Open a manufacturing order and Click “**Work Order**” button in the form.

Manufacturing Orders / MO/00011

Save	Discard	6 / 6										
Cancel	Scrap	Unreserve										
Confirmed → Planned → In Progress → Done												
<b>MO/00011</b> <div style="float: right;">0 / 3 Work Orders</div>												
Product	[LAP-CUS] Laptop Customized	Deadline Start	09/16/2017 10:59:14									
Quantity To Produce	5.000	Update	Administrator									
Bill of Material	123: [LAP-CUS] Laptop Customized	Responsible										
Routing	Custom Assembly Line	Source										
<table border="1"> <thead> <tr> <th>Consumed Materials</th> <th>Finished Products</th> <th>Miscellaneous</th> </tr> </thead> <tbody> <tr> <td>[CARD] Graphics Card</td> <td>Quantity Available: 5.000</td> <td>To Consume: 5.000 Consumed: 0.000</td> </tr> <tr> <td>[C-Case] Computer Case</td> <td></td> <td></td> </tr> </tbody> </table>				Consumed Materials	Finished Products	Miscellaneous	[CARD] Graphics Card	Quantity Available: 5.000	To Consume: 5.000 Consumed: 0.000	[C-Case] Computer Case		
Consumed Materials	Finished Products	Miscellaneous										
[CARD] Graphics Card	Quantity Available: 5.000	To Consume: 5.000 Consumed: 0.000										
[C-Case] Computer Case												

- Or you can access all your work orders from “**Manufacturing > Operations > Work Order**”

Work Orders

In Progress or Ready	Search...				
Filters	Group By	Favorites	1-5 / 5		
[PCSC234] Computer SC234 1.000 Unit(s)	MO/00005	[E-COM92] Self Build Kit 1.000 Unit(s)	MO/00007	[LAP-CUS] Laptop Customized 1.000 Unit(s)	MO/00009
[PCSC234] Computer SC234 3.000 Unit(s)	MO/00001	[LAP-CUS] Laptop Customized 5.000 Unit(s)	MO/00011		

- In the first Case you will see all the work orders listed there with their status.

Manufacturing Orders / MO/00011 / Work Orders							
				Search...			
				Filters		Group By	
				★ Favorites		1-3 / 3	
Work Order	Scheduled Date Start	Work Center	Manufacturing Order	Product	Original Production Quantity	Unit of Measure	Status
Packing	Drill Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	In Progress	
Testing	Assembly Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	Pending	
Long time assembly	Assembly Station 1	MO/00011	[LAP-CUS] Laptop Customized	5.000	Unit(s)	Pending	

- Select the Tasks from Work Order one by one and complete it.

Manufacturing Orders / MO/00009 / Work Orders / Packing

To Produce: [LAP-CUS] Laptop Customized  
Quantity Produced: 0.000 / 1.000 Unit(s) **Ready to produce**

Attachment(s) ▾

Done Pause Block Scrap Pending Ready In Progress Finished

Work Instruction Current Production Time Tracking Miscellaneous

Page: 1 of 1

No. Cleaning Steps

1 Clean weld spatter and debris off:  
A. Bracket holders ( 4 )  
B. Flange plate fixture surface  
C. Stopping blocks ( 4 sets )  
at breaks, lunch and end of shift or more frequently  
2 Use file, wire brush , air hose, rag and/or cleaner to remove more concentrated spatter or debris.  
3 Apply "Zip Dip" lightly to end of bracket holders  
4 If spatter or debris can not be removed using these methods contact Team Leader or Set up Person.

Air Hose Brush Dip" File

Critical Points

Too Much "Zip Dip" can collect weld spatter and debris causing more unscheduled downtime.  
Be cautious not to damage sensors while cleaning.  
Make sure "Points of Contact" always remain clean.

Safety

Do not leave rags inside the weld cells.  
Careful of pinch points.

Stopping Blocks

- Use 'Pause', 'Block', 'Done' Buttons to control the progress of Task.
- Done** means the Task is completed or the Task Status changes to **Finished** and you can automatically move to next Task in the Work Order.

Manufacturing Orders / MO/00009 / Work Orders							
				Search...			
				Filters		Group By	
				★ Favorites		1-3 / 3	
Work Order	Scheduled Date Start	Work Center	Manufacturing Order	Product	Original Production Quantity	Unit of Measure	Status
Packing	Drill Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	In Progress	
Testing	Assembly Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	Pending	
Long time assembly	Assembly Station 1	MO/00009	[LAP-CUS] Laptop Customized	1.000	Unit(s)	Pending	

- Complete all the processes in the Work Order to complete Production

- Once you complete all the process in Work order then you can add the product into the inventory

## Bill of Materials

BoM is the basic building block of any manufacturing process. It is the list of raw material needed to produce a product. So while creating a manufacturing order for a particular product we need to select corresponding BoM from the list. BoM will help us to create the inventory updated during manufacturing process. So before creating BoM we first need to add the Raw material to our product list in inventory.

- Manufacturing > Master Data > Bill of Materials > Create**

The screenshot shows the 'Bill of Materials / New' screen. At the top, there are 'Save' and 'Discard' buttons. Below them, there are fields for 'Product' (dropdown), 'Product Variant' (dropdown), 'Quantity' (text input with value '1.00'), and 'Routing' (dropdown). To the right, there is a 'Reference' field (dropdown) and a 'BoM Type' section with two radio buttons: 'Manufacture this product' (selected) and 'Ship this product as a set of components (kit)'. A large 'Active' checkbox is checked. Below these, there are tabs for 'Components', 'Miscellaneous', and 'Byproducts'. The 'Components' tab is selected, showing a table with columns 'Product', 'Product Quantity', 'Variants', and 'Consumed in Operation'. A 'Add an item' button is at the bottom of the table. The table is currently empty.

- Select a product from list.
- Go to **Settings -> Manufacturing Order -> Product variant** option to enable select product variant option. (In case you produce a product Variant)
- Reference** field is used to distinguish Different BoM for same product.
- Click **Add an Item** field and add the raw materials for your product.
- “Routing”**, field is used to specify the WorkCentre routing of manufacturing process.
- Under the **Miscellaneous** tab in BoM, **Sequence** defines the order in which your BoMs will be selected for production orders, with lower numbers having higher priority.

*Note: - A BoM can be later Updated/Deleted from same menu i.e. **Manufacturing > Master Data > Bill of Materials**.*

# Work center

As the name indicates, it is the Physical place in your firm where different manufacturing processes are done. You can create you work center details with all its performance indices. Later you can use this data to analyze the efficiency and other details of each work center.

## Create Work Center

- Manufacturing -> Master Data -> Work Centers ->Create

Work Centers / New

Save Discard

Active	0% OEE	0 hour(s) Lost
0 minute(s) Work Center ...	0%	Performance

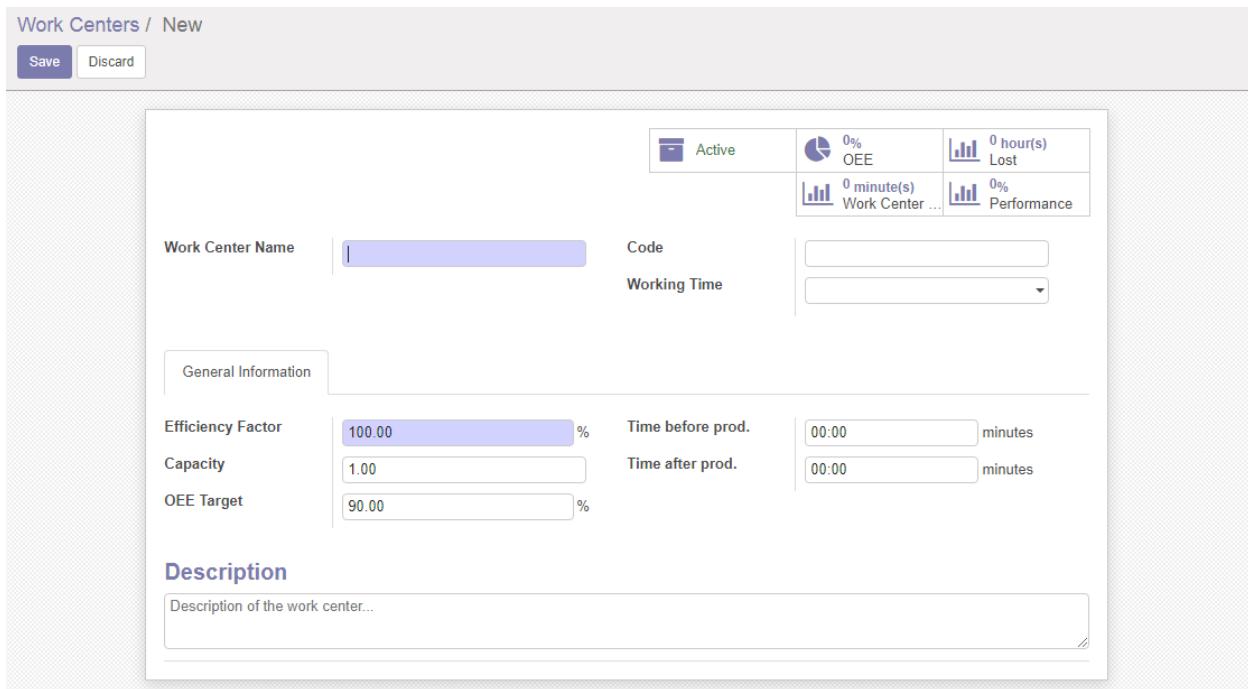
Work Center Name:  Code:   
Working Time:

General Information

Efficiency Factor: <input type="text"/> %	Time before prod.: <input type="text"/> minutes
Capacity: <input type="text"/>	Time after prod.: <input type="text"/> minutes
OEE Target: <input type="text"/> %	

Description

Description of the work center...



- Add all the necessary information including the process done here and the performance factors etc. in field
- Click <save> and mark <Active> to make it available for use.

Note: -“you can update/ Delete any work center information from same menu i.e. **Manufacturing > Master Data > Work Centers >**”

## Routing

Each product have its own routes. Manufacturing process is not a single step process it may contain many **Work Centers** and each work centers have its own processes and process time. From this menu, we can set the order or route of each manufacturing. It's purely depends on the manufacturing company process. Some company has same type of manufacturing process. Then we create one routing. Some company has different manufacturing process for different products. Then we create each multiple routing.

- **Manufacturing > Master Data > Routings > Create**

The screenshot shows the 'New' screen for creating a routing. At the top, there are 'Save' and 'Discard' buttons. Below them is a 'Time Analysis' button and an 'Active' checkbox. The main area is titled 'New' and contains a 'Routing Name' field with a placeholder 'Enter name...'. A table for 'Work Center Operations' is shown with three columns: 'Operation', 'Work Center', and 'Duration'. A button 'Add an item' is located below the table. The entire interface is designed for inputting data into a manufacturing routing.

- Give Rout a Name
- Click Add an Item to add the work centers included in this rout
- Click <save> and <Mark Active>

**Note:** - "You can Update/Delete a routing process from same menu i.e. **Manufacturing > Master Data > Routings**"

## Work Order

Once you have created and confirmed Manufacturing Order with a specific Rout. All the processes in the Rout are listed as work orders. So in order to complete a production, we must complete all the associated processes in work order. We can access Work Order related to a Manufacturing Order, either from Manufacture Order form or directly from **Manufacturing > Operations > Work Orders**

## Scrap

One of the most useful features of Odoo is that you can create Scrap at any stage of production line. You can always see a Scrap button almost all the stages of the production line. Click this button to create instant scrap entry in inventory. You can create fresh scrap entry from

- **Manufacturing -> Operations -> Scrap -> Create**

Or you can make a quick entry by clicking on **Scrap** button available on almost all forms of production.

The screenshot shows the Odoo Manufacturing Orders interface for order MO/00002. At the top, there are buttons for Edit, Create, Print, Action, and status indicators (Confirmed, In Progress, Done). A 'Scrap' button is visible. The main area displays a 'Scrap' form with fields for Product (iPhone 7), Quantity (1), and Manufacturing Order (MO/00002). At the bottom are 'Done' and 'Cancel' buttons.

- Fill the fields and Click “**Done**”. It will automatically inserted into the inventory.

## Unbuild Orders

Another useful feature in Manufacturing is Unbuild. We can unbuild the products into its bill of materials. This is actually a reverse process of production.

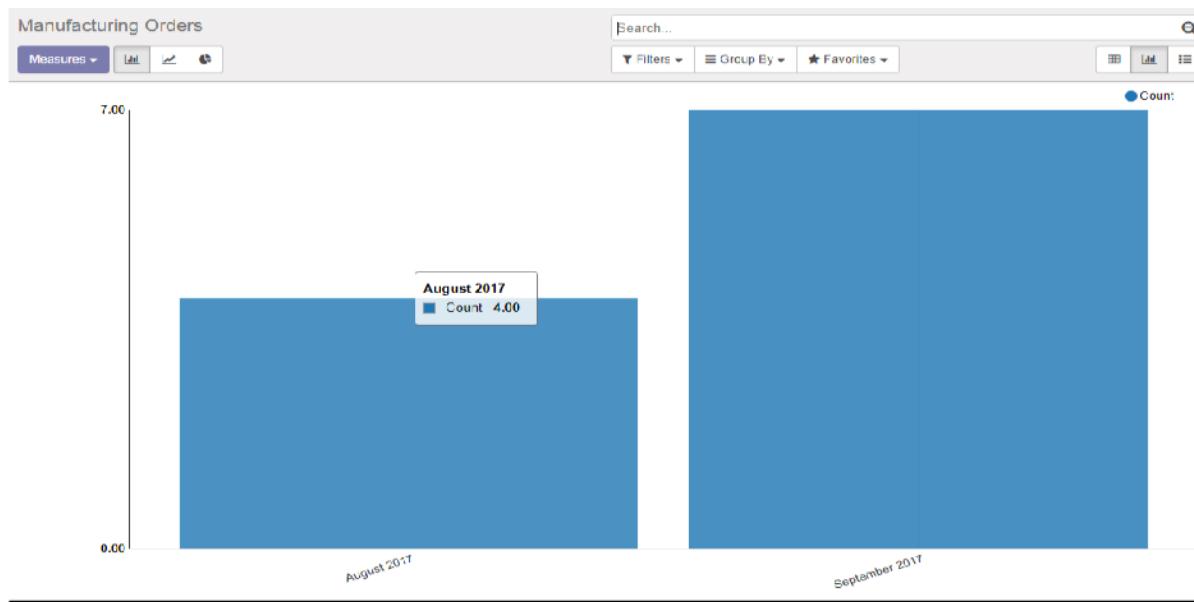
- **Manufacturing > Operations > Unbuild Orders > Create**

The screenshot shows the Odoo Manufacturing Orders interface for order UB/00001. The sidebar includes links for Operations, Manufacturing Orders, Unbuild Orders, Scrap, Workorder Messages, Master Data, Products, Bill of Materials, Reporting, Manufacturing Orders, and Configuration. The main area displays an 'Unbuild Orders' form for order UB/00001, showing a product (iPhone 7) and quantity (2.00) with a 'Bill of Material' section. A 'Moves' button is also present.

- Select the product which need to Unbuild,
- Select the bill of materials and quantity.
- If you need to specify a particular Manufacturing Order we can mention it here.
- Click <Done> and <Save>

## Reporting

Odoo Reporting tools can produce concise yet very effective reports. You can view different types of report on Manufacturing Orders, Work orders, Work center Performance etc. under Reports tab



## Configurations and Useful Settings

### Byproducts configurations

A by-product is a secondary product derived from a manufacturing process. It is not the primary product or service being produced. To activate by product feature

- Manufacturing > Settings

<b>By-Products</b>	<input checked="" type="radio"/> No by-products in bills of materials (A + B → C) <input type="radio"/> Bills of materials may produce residual products (A + B → C + D)
--------------------	---

Tick the second option to enable By Products field in BoM. After ticking this we can see an additional tab in the BOM form after the miscellaneous.

<b>Product</b>	iPhone 7	<b>Reference BoM Type</b>	<input checked="" type="checkbox"/> Active												
<b>Quantity</b>	1.00	Manufacture this product													
Components    Miscellaneous <b>Byproducts</b> <table border="1"> <thead> <tr> <th>Product</th> <th>Product Qty</th> </tr> </thead> <tbody> <tr> <td>iphone by-product</td> <td>1.000</td> </tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>				Product	Product Qty	iphone by-product	1.000								
Product	Product Qty														
iphone by-product	1.000														

- Here we can add byproducts
- If we add the byproducts it will reflect on the MRP order.

<b>Product</b>	iPhone 7	<b>Deadline Start</b>	07/11/2017 14:47:14												
<b>Quantity To Produce</b>	1.000    Update	<b>Responsible</b>	Administrator												
<b>Bill of Material</b>	iPhone 7	<b>Source</b>													
Consumed Materials <b>Finished Products</b> Miscellaneous <table border="1"> <thead> <tr> <th>Product</th> <th>To Produce</th> <th>Produced</th> </tr> </thead> <tbody> <tr> <td>iPhone 7</td> <td>1.000</td> <td>0.000</td> </tr> <tr> <td>iphone by-product</td> <td>1.000</td> <td>0.000</td> </tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>				Product	To Produce	Produced	iPhone 7	1.000	0.000	iphone by-product	1.000	0.000			
Product	To Produce	Produced													
iPhone 7	1.000	0.000													
iphone by-product	1.000	0.000													

# **Human Resource**

Odoo human resource management module is a comprehensive package to meet all your HR-related needs. It can manage the functions from Recruiting to, Employee Information Management, to Attendance and Leave management, Payroll, Expense, and Timesheet management. You have to install following apps from Odoo apps to enable HR management features.

## **Employee Directory**

This application allows you to create and manage the employee directory of your organization. You can create your organization's department hierarchy and add employees under different department matching your organization's structure. Employee contract details are configured using this module. So this is the base of HR module.

## **Attendance**

Employee attendance can be managed by installing this module. There are different attendance marking options available with Odoo. You can also add hardware for attendance marking. The module is integrated with Payroll, Leave Management, and Timesheet so that it provides a consistent attendance tracking mechanism.

## **Leave Management**

Integrated with attendance, Payroll, and Timesheet, Leave Management allows the administrator to take efficient decisions on employee leave request.

## **Payroll**

Odoo Payroll makes the complexity of payroll management simpler. You can create simple and complex salary structure based on salary rules. This salary structure can be applied to employee contract to generate monthly payment slip. From Odoo store you can also download custom payrolls for easy management.

## **Expense Management**

Expense management module enables management of expenses occurred to employees. The employee can submit their expenses and appropriate officers can take actions on such requests.

## **Timesheet Management**

It is another efficient module to manage timesheets of each employee. This is generally used for efficient management of projects or tasks.

## **Recruitment**

You can automate and monitor all recruitment with this module. Recruitment stages, criteria, qualifications etc. can be configured with this module. You can install Online Jobs app to channelize recruitment via your website.

There are some more other useful apps and plugins that you can find in Odoo App store.

Some of the features [14] of the Odoo HRM module is

- **Manage**

### ***Create employee profiles***

Gather all information concerning each employee at one place.

### ***Manage contracts***

Keep track of your employees' status, job titles, contract type and dates, and their schedule.

### ***Manage timesheets***

Create weekly and monthly timesheets and follow the time spent by your employees on projects.

### ***Handle attendance***

Keep the track of your employees' presence at work. HR managers can easily report employees' monthly presence with the menu entry and state.

### ***Manage leaves***

Manage holidays, legal leaves and sick days.

### ***Dashboards***

Get a dashboard per manager.

- **Collaborate**

### ***Enterprise social network***

Follow employees and documents, join discussion groups, share files, and chat in real time.

### ***Gamification***

Design challenges, goals and rewards with clear targets and objectives to drive engagement and reward your employees' performance. [14]

## System Users:-

Basically there are three types of users in HR management process

**Employee:** - Normal employee of office. He can mark his attendance, access the tasks assigned to him, manage his timesheet and perform other tasks associated with him.

**Officer:** - A higher level employee who has better powers and access rights like sanction leave, sanction time sheet etc.

**Manager:** - Manager who control and configure every procedure in HR module. Complete control over all level.



## Department Management

Create and manage your organizations departmental hierarchy easily with Odoo HR module.

### Create department

- Employee > department > Create

The screenshot shows the 'Departments / New' screen. At the top, there are 'Save' and 'Discard' buttons. The main area contains fields for 'Department Name' (with a placeholder 'l'), 'Parent Department' (a dropdown menu), 'Manager' (a dropdown menu), and a status checkbox labeled 'Active' which is checked. The background is light gray with a white form area.

Fill all necessary fields and click <save>

**Note:** - "to create a sub department choose the parent department from

*dropdown” Note: - “mark it as **Active**, then only the created department will be available to use”*

### Delete/Update department

#### Employee > department

- Click on <more> option from your respective department

A screenshot of a software interface. At the top, it says "Management YourCompany" and has a "More" dropdown. Below that, there's a purple button labeled "Employees". To the right, it shows "Leave Requests 14" and "Allocation Reque... 1". At the bottom, there's a section for "Absence" with a progress bar showing "0 / 1".

- Choose <Settings> from the option and make the changes you need

### View Employees in the department

- Employees > Department

A screenshot of a software interface. At the top, it says "Management YourCompany" and has a "More" dropdown. Below that, there's a purple button labeled "Employees". To the right, it shows "Leave Requests 14" and "Allocation Reque... 1". At the bottom, there's a section for "Absence" with a progress bar showing "0 / 1".

Click on <Employees> button on respective department to view employees of that department

## Department wise Report

- Employee -> department
- Click on <more> option from your respective department

The screenshot shows a dashboard titled "Administration YourCompany". It has three main sections: "To Do", "To Approve", and "Reports".

- To Do:** 0 New Applic...
- To Approve:** 0 Timesheets, 1 Leave Req..., 0 Allocation ..., 0 Expense R...
- Reports:** Timesheets, Leaves, Recruitments, Attendances, Expense Re...

At the bottom, there is a color bar and a "Settings" link.

You can click on any of the reports to view in detail

## Employee profile management

### Create an Employee Profile

- Employees > Create

The screenshot shows the "Employees / New" form. It includes fields for Name, Contact Information, Position, and other details.

**Name:** Employee's Name (with placeholder e.g. Part Time)

**Contact Information:** Working Address (YourCompany), Work Mobile, Work Location, Work Email, Work Phone.

**Position:** Department (dropdown), Job Title (dropdown), Manager, Coach, Working Time (dropdown).

**Other Information:** Other Information ...

Buttons at the top left include "Save" and "Discard".

You can jump through “Public information”, “personal information”, HR settings” tabs to find all the necessary information for an employee.

- Click <Save>

### Update/Delete an employee

- Employees > Dashboard
- Select any of the employee from the list.

The screenshot shows the Odoo Employee details window for Antoine Langlais. At the top, there are buttons for Edit, Create, Print, Attachment(s), and Action. The main area displays a profile picture of Antoine Langlais, his name, and his roles as Trainer and Employee. To the right, there are four status indicators: Active (blue box), Leaves Left (calendar icon, 0), Contracts (document icon, 0), Timesheets (clock icon, 0), and Payslips (document icon, 0). Below this, there are three tabs: Public Information (selected), Personal Information, and HR Settings. The Contact Information section contains fields for Working Address (Building 1, Second Floor), Work Mobile (antonine@openerp.com), Work Location (Work Email, Work Phone). The Position section contains fields for Department (Research & Development), Job Title (Chief Technical Officer), Manager (Coach), and Working Time.

- You can view employee info on the window, make necessary changes if needed and save
- To delete an employee click on ‘Action’ > Delete

**Note:** - “In HR Tab there is field “Related User”, using this option you can assign an employee to any ‘system user’. For example, project manager can be any employee of the firm as well as he can be the “Administrator” of the system”

# Contract management

## Add new contract

- Employees > Contract > Create

Contracts / New

Save Discard

New Running To Renew Expired

Contract Reference

Contract Reference

Employee Department

Job Title Contract Type

Employee

Information Work Permit

Salary and Advantages

Wage 0.00

Salary Structure

Advantages...

Duration

Trial Period Duration

Duration 09/13/2017

Working Schedule

Scheduled Pay Monthly

You can select 'Employee' 'Department' and other basic information from the window and assign the contract directly to an employee.

## Working Schedule:-

We can set working schedule of the Employee from here itself. Click working Schedule **Drop Down** menu to add working schedule of the employee.

Create: Working Schedule

Name Workgroup Manager

Working Time

Name	Day of Week	Work from	Work to	Starting Date	End Date
n1	Monday	00:00	00:00		

Add an item

Leaves

Reason	Resource	Working Time	Start Date	End Date

Add an item

Save Discard

- Click Add an Item to Fill duty timing and Leaves
- Click <Save>

## Update/Delete a contract

Admin can Update a contract information, contract Status or delete a contract altogether by following method

### Employees > Contract

Select the contract you wish to change

The screenshot shows the Odoo Contracts module. At the top, there's a header with 'Contracts / Marketing Executive Contract' and buttons for 'Edit' (highlighted), 'Create', 'Attachment(s) ▾', 'Action ▾', and navigation arrows. Below the header, a ribbon at the top right shows 'New' (highlighted), 'Running', 'To Renew', and 'Expired'. The main content area is titled 'Marketing Executive Contract'. It displays employee information (Roger Scott, Job Title: Marketing Executive), department (Contract Type: Employee), and salary details (Wage: 4,000.00, Salary Structure: Marketing Executive). The duration section shows a trial period from 08/01/2017 to 12/31/2017, 40 hours/week, and monthly scheduled pay. A notes section indicates it's a default contract for marketing executives.

- Make edits wherever needed and click <Save>

**Note:** "change the status of the contract by just clicking on ribbon that indicate the status"



## Leave Management

Leave management in Odoo is done through two phase at first phase employee request for leave and the HR manager or concerned level officer must sanction the leave. Odoo generates detailed report to analyses the leave behavior. Admin or concerned officer can view these reports before sanctioning leave to an employee.

## Making Leave Request

- Leaves > My Leaves > Leave Summary > Create

Leaves Summary / New

Save Discard

To Submit To Approve Approved

Description	<input type="text"/>
Leave Type	<input type="button" value="dropdown"/>
Duration	<input type="button" value="dropdown"/> <input type="button" value="dropdown"/>
	0.00 days

- Fill the fields and <save>

(Now the status of your leave is “**To Approve**”, it will be changed once concerned officer approve this leave).

## Approve leave

Once a user make a leave request, the concerned officer like HR admin must approve the same to sanction leave.

- Login as Administrator

### Leaves > Leaves to Approve

- All leave requests will be listed here
- Select a leave request and Approve or Reject

Leaves Request / John Doe on Sick Leaves : 4.00 day(s)

Edit Create Action ▾ 1 / 1 < >

Reset to Draft To Submit To Approve Approved

### John Doe on Sick Leaves : 4.00 day(s)

Description	Test Leave
Leave Type	Sick Leaves
Duration	06/05/2017 07:00:00-06/08/2017 19:00:00 4.00 days

## Leave Report

Administrator can View detailed and varying reports in his dashboard.

- Leaves > Reports

The screenshot shows the Odoo All Leaves report for September 2017. The interface includes a sidebar with navigation links like Dashboard, My Leaves, Leaves Summary, Leaves Request, Allocation Request, Leaves to Approve, Leaves, Leaves Allocation, Reports, Leave Details, Leaves, Leaves by Department, and Configuration. The main area displays a monthly calendar from September 1 to 30, 2017. Specific days are highlighted in green to indicate leave requests. For example, on September 1st, there is a note: "14:45:00 - 22:45:00 Ashley Presley on Unpaid : 1.60 day(s)". Other days like September 3rd and 4th also have similar green highlights with notes about leave requests. The bottom left of the calendar area says "Powered by Odoo".

## Leave Allocation

Unlike leave request, leave allocation is more planned leave request employee can request to allocate leave for him (generally in case of long leaves). Leave allocation option in Odoo leave management gives an easy interface to accomplish this task.

- Leaves > My leaves > Allocation Request > Create

The screenshot shows the Odoo Allocation Request / New form. At the top, there are buttons for Save, Discard, Approve, Refuse, To Submit, To Approve, and Approved. The main form contains fields for Description (with an input field), Leave Type (a dropdown menu), Duration (a numeric input field with ".00" and "days" suffix), Mode (a dropdown menu set to "By Employee"), Employee (a dropdown menu set to "Pieter Parker" with a edit icon), and Department (a dropdown menu set to "Management"). Below these fields is a text area labeled "Add a reason...".

Fill the fields and click **<Save>** to submit the leave to manager for approval

# Attendance Management

Odoo HR management includes attendance module which manages employee's attendance. Attendances are recorded according to the Check in/ Check Out actions. After installing attendance module from Odoo apps, we can see a new menu named Attendances.

## Attendance Entry

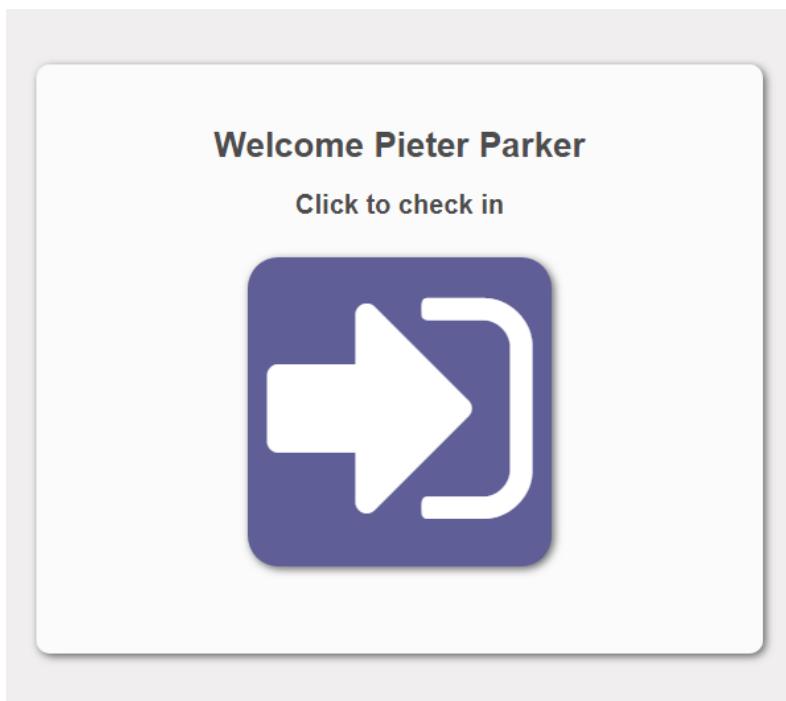
Basically there are three ways to mark attendance

- Direct login and mark attendance
- Admin Make manual check in and check out entry
- Kiosk Mode
- 

Direct login and mark attendance

Since system login credentials are generally available to officer level employees this attendance marking facility is available only for those employees who have a system login Username and Password. They can login to the system and mark their attendance from **Attendance** menu.

**Login > Attendance**



Click the image **to check in** and click again to check out.

## Admin make manual entry

Since direct login is not allowed for all users, Odoo provides another option to mark attendance. Administrator or any dedicated person can mark attendance for each employee.

- **Attendances -> Manage Attendances ->Attendances ->Create**

The screenshot shows the 'Attendances / New' screen. At the top, there are 'Save' and 'Discard' buttons. The main area contains four fields: 'Employee' (Pieter Parker), 'Check In' (09/13/2017 12:30:01), 'Check Out' (empty), and 'Sheet' (empty). The background has a light grey grid pattern.

- Mark the fields and <Save>

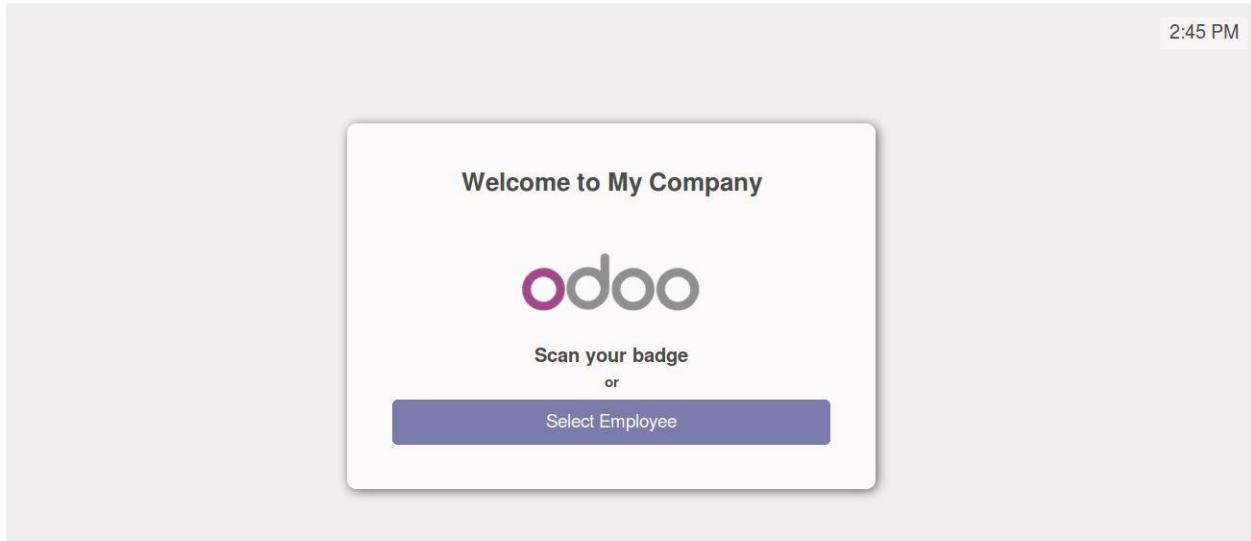
## Kiosk Mode

New Interface provided by Odoo version 10, which feeds attendances of employee using their badges or pin. The badges can print from employee form.

The screenshot shows the 'Employees / John Doe' screen. At the top, there are 'Edit' and 'Create' buttons, and a 'Print' dropdown menu with 'Leaves Summary' and 'Print Badge' options. A status bar indicates '2 / 2' and navigation arrows. Below the header, there is a summary bar with icons for 'Active' (blue square), '5 Leaves Left' (calendar icon), and '1 Contracts' (document icon). The main content area is divided into sections: 'Status' (Related User: John Doe, Badge ID: 81058979, PIN: 0346, Manual Attendance checked) and 'Current Contract' (Medical Exam, Company Vehicle, Home-Work Dist., 0). Navigation tabs at the bottom include 'Public Information', 'Personal Information', and 'HR Settings'.

Using these badges employees can Check In/out.

- Attendances -> Manage Attendances -> Kiosk Mode

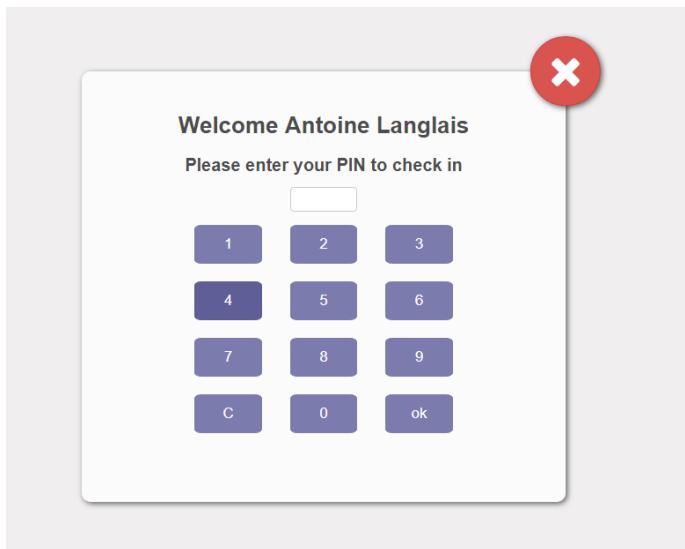


Another option is Check in/out using pin. For this we have to enable Configurations under **Attendance** menu.

**Settings**

<b>Employee PIN</b>	<input type="radio"/> Employees do not need to enter their PIN to check in manually in the "Kiosk Mode". <input checked="" type="radio"/> Employees must enter their PIN to check in manually in the "Kiosk Mode".
---------------------	---

Use “**Select Employee**” button on kiosk mode to check in/out using pin. It gives the interface to enter pin.



## Reports

Admin can view detailed attendance report on

Attendances > Report

The screenshot shows the Odoo web interface for 'Attendance Analysis'. On the left, there's a sidebar with links: 'My Attendances', 'Manage Attendances', 'Attendances', 'Employees', 'Kiosk Mode', 'Reports', and 'Configuration'. The main area has a title 'Attendance Analysis' and a 'Measures' dropdown menu with icons for search, filter, and export. Below is a table showing worked hours for four employees across two months:

	Total			Worked Hours
	+ August 2017		+ September 2017	
	Worked Hours	Worked Hours	Worked Hours	
- Total	58.40	19.32	77.72	
+ Ashley Presley		0.00	0.00	
+ Gilles Gravie	49.40		49.40	
+ Hans Anders		0.00	0.00	
+ Pieter Parker	9.00	19.32	28.32	

## PayRoll

To enable the payroll functionalities we have to install a new plugin in HR, called Payroll. To integrate payroll with accounting, you have to install another plugin that is Payroll Accounting from Odoo apps. To generate a pay slip, the **employee should have an active contract and a salary structure. Salary structures are created using different salary rules of different categories.**

### Salary Rule

Salary rules are the basic blocs for calculating an employee's salary. It specifies how to calculate DA, HRA, Gross etc. components of a person's salary.

## Create salary rule

- Pay Roll -> Salary Rule -> Create

Salary Rules / New

Save Discard

Name

Category

Code

Active

Sequence 5

Appears on Payslip

General Child Rules Inputs Description

**Conditions**

Condition Based on Always True

**Computation**

Amount Type Fixed Amount

Quantity 1.0

Fixed Amount 0.00

## Field Description

**Condition:** - set a condition to apply the Rule

Always True means the rule is always applied

Range means you can choose a salary range to apply the rule

By choosing Python expression you can configure more customization

**Computation:** - Choose the computational scheme from the options

**Contribution Register:** - Use, if third party involved in salary payment

*"Add more rules (if needed) from Child Rule tab and jump to Inputs and Description tabs to add other necessary details about Salary Rule"*

- Click Save to save the salary rule

## Update/Delete a salary rule

- Pay Roll > Salary Rule

Salary Rules		Search...		
	Name	Code	Category	Contribution Register
<input type="checkbox"/>	Basic	BASIC	Basic	
<input type="checkbox"/>	Gross	GROSS	Gross	
<input type="checkbox"/>	Net	NET	Net	Employees
<input type="checkbox"/>	House Rent Allowance	HRA	Allowance	House Rent Allowance Register
<input type="checkbox"/>	Conveyance Allowance	CA	Allowance	
<input type="checkbox"/>	Professional Tax	PT	Deduction	Professional Tax Register
<input type="checkbox"/>	Provident Fund	PF	Deduction	Provident Fund Register
<input type="checkbox"/>	Conveyance Allowance For Gravie	CAGG	Allowance	
<input type="checkbox"/>	Meal Voucher	MA	Allowance	Meal Voucher Register
<input type="checkbox"/>	Get 1% of sales	SALE	Allowance	

- Select the Pay Rule you wish to change from the list and Click <Edit> button

Salary Rules / House Rent Allowance

Edit	Create	Attachment(s) ▾	Action ▾	4 / 10
<b>House Rent Allowance</b>				
<b>Allowance</b>				
Code	HRA	Sequence	5	
Active	<input checked="" type="checkbox"/>	Appears on Payslip	<input checked="" type="checkbox"/>	
<input type="button" value="General"/> <input type="button" value="Child Rules"/> <input type="button" value="Inputs"/> <input type="button" value="Description"/>				
<b>Conditions</b>				
Condition Based on	Always True			
<b>Computation</b>				
Amount Type	Percentage (%)			
Percentage based on	contract.wage			
Quantity	1.0			
Percentage (%)	40.0000			
<b>Company Contribution</b>				
Contribution Register	House Rent Allowance Register			

- Make necessary changes in the fields and <save>
- Or you can delete the rule from Action > Delete

## Salary Structure

Salary structure is the second building block in salary computation. A company may have different salary structure for different employees. In this section we can define different salary structure with the help of basic rules we already defined.

### Create Salary Structure

- Payroll -> Configuration -> Salary Structure ->Create

The screenshot shows the Odoo interface for creating a new salary structure. The left sidebar has a 'Salary Structures' entry highlighted. The main window title is 'Salary Structures / New'. It contains fields for 'Name' and 'Parent' (set to 'Base for new structures'). Below these are sections for 'Salary Rules' and 'Contribution Registers'. The 'Salary Rules' section has a table with one row: Basic (Code: BASIC, Category: Basic, Contribution Register: Employees).

You can add any applicable salary rule to this structure to make new salary rule.

- Once finished click <Save>

### Update/Delete Salary Structure

- Payroll -> Configuration -> Salary Structure
- Select the salary Structure you wish to edit
- Click <Edit>

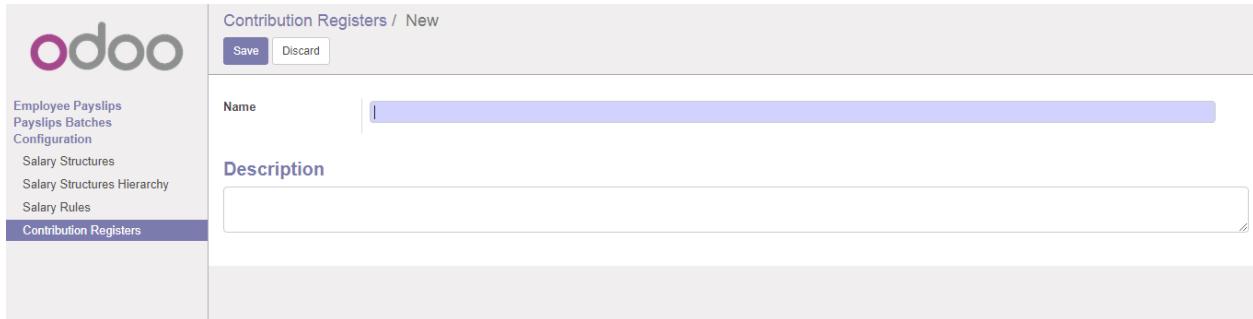
The screenshot shows the Odoo interface for editing a salary structure named 'Base for new structures'. It includes fields for 'Name' (Base for new structures) and 'Parent' (empty). The 'Salary Rules' section contains a table with three rows: Basic (Code: BASIC, Category: Basic), Gross (Code: GROSS, Category: Gross), and Net (Code: NET, Category: Net). The 'Contribution Register' column for Net is set to 'Employees'.

- Make the changes and <save>
- Or you can delete the structure altogether

## Contribution Registers

Contribution registers are used to manage the salary component contributed by external entities. You must create all contribution registers first, then it can be accessed while you create Salary Rule.

- Payroll > Contribution Register > Create



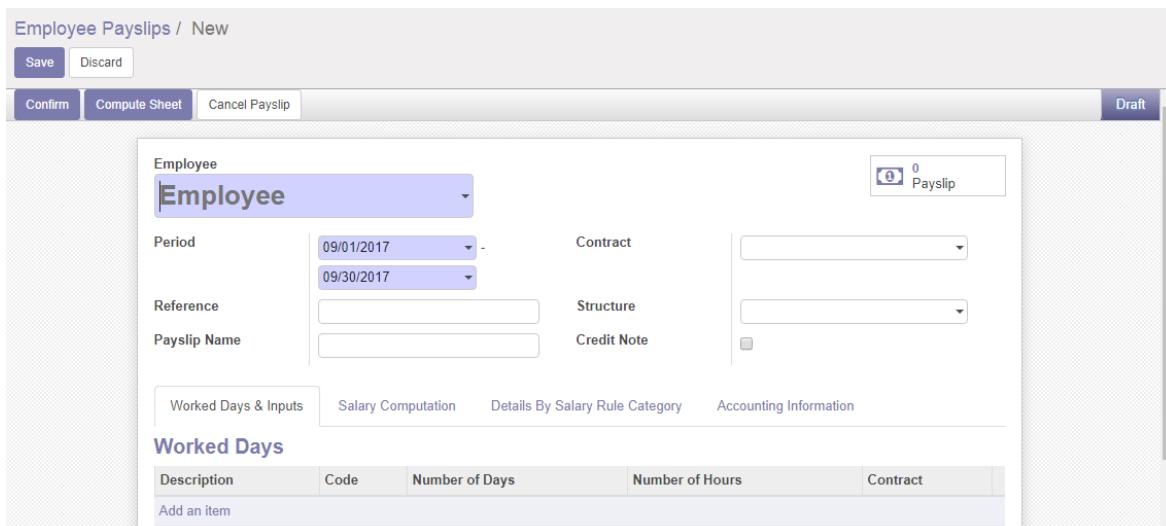
**Note:** - "you can Update or Delete Contribution Register from the same menu itself"

## Payslip

Pay slip is the ultimate output of Payroll. A pay slip undergoes different Status in Odoo Payroll management. '**Draft**', '**Waiting**', '**Done**', '**Rejected**'. These options are for the sake of proper management within the organization. A pay slip can be created by an entry level employee, but its approval must be come from a managerial employee.

### Create Pay slip

- Payroll > Employee Pay slip > Create



Once you have filled the necessary information then click **Compute Sheet** to calculate salary and **<Save>**

**Note:** - Once it is **Confirmed**, the Payslip will be in **Waiting** stage an officer level user must mark it as **Done** to get actual Approval for the Payslip. Same Rule stages are applicable to Batch Payslip also.

### Update or Delete Payslip

#### Payroll > Employee Payslip

- Select any Payslip you wish to Update/Delete > **Edit**

Employee Payslips / Salary Slip of Gilles Gravie for September-2017

Save Discard 1 / 5 < >

Refund Draft Done

Employee  
**Gilles Gravie**

Period: 09/01/2017 - 09/30/2017      Contract: Contract For Gilles Gravie

Reference: SLIP/002      Structure: Marketing Executive for Gilles Gravie

Payslip Name: Salary Slip of Gilles Gravie for September-2017      Credit Note:

Worked Days & Inputs      Salary Computation      Details By Salary Rule Category      Accounting Information

**Worked Days**

Description	Code	Number of Days	Number of Hours	Contract
Normal Working Days paid at 100%	WORK100	21.00	168.00	Contract For Gilles Gravie

21.00

**Other Inputs**

- Make changes and Save
- Or **Discard** to delete the Payslip

### Batch Payslip

Batch Payslip is used to process Payslip for group of employees. You can add number of employee to a single batch and generate Payslip simultaneously instead of individual processing.

## Create Batch Payslip

- Payroll -> Payslip Batches -> create

Payslips Batches / New

Save Discard

Close Generate Payslips Draft Close

Name

Period 09/01/2017 - 09/30/2017 Credit Note

Payslips

Reference	Employee	Payslip Name	Date From	Date To	Status
Add an item					

- Click Add an Item to add employees to list

Create: Payslips

Confirm Compute Sheet Cancel Payslip Draft

Employee Employee 0 Payslip

Period 09/01/2017 - 09/30/2017 Contract

Reference Structure

Payslip Name Credit Note

Worked Days & Inputs Salary Computation Details By Salary Rule Category Accounting Information

Worked Days

Description	Code	Number of Days	Number of Hours	Contract
Add an item				

Save & Close Save & New Discard

- Add all the employees you need to the list and <Save>.

## Update/Delete Batch Payslip

- Payroll -> Payslip Batches
- Select the Batch Slip from the list and click <Edit>

The screenshot shows the Odoo interface for managing payslip batches. At the top, there are buttons for 'Edit' and 'Create', and dropdown menus for 'Attachment(s)' and 'Action'. On the right, it shows '1 / 1' and navigation arrows. Below the header, there are buttons for 'Close', 'Generate Payslips', 'Draft', and 'Close'. The main area is titled 'new' and contains a table for 'Payslips'. The table has columns: Reference, Employee, Payslip Name, Date From, Date To, and Status. Two rows are listed:

Reference	Employee	Payslip Name	Date From	Date To	Status
	Gilles Gravie	Salary Slip of Gilles Gravie for September-2017	09/01/2017	09/30/2017	Draft
	Jack Macklin	Salary Slip of Jack Macklin for September-2017	09/01/2017	09/30/2017	Draft

- Make changes and save
- Or you can discard

## Expenses

Expenses bared to an employee can be managed with simple steps in Odoo Expense manager. Here an employee can generate, submit and track status of his expenses. There are two ways to generate expense. Either by single expense or “**Report Expense**” mode. As the name indicates former can include only single expense at a time, later can add many items and expenses in a single report.

Once the employee submits the expense details, concerned manager or officer can view it and take actions. An expense bill undergoes different states like “**Submitted**”, “**Approved**”, “**Posted**”, and “**Paid**”. These options are for sake of proper management of the expense bill within the organization just like in the case of Payslip. For example expense approval may be given by operation department and payment is done by the finance department.

## Generate an Expense

### Single expense creation

- Expenses > My Expenses > Expenses to Submit > Create

My Expenses to Submit / New

Save Discard

Submit to Manager To Submit Reported Posted

Expense Description  
e.g. Lunch with Customer

0 Documents

Product	\$ 0.00	Bill Reference
Unit Price	\$ 0.00	Date
Quantity	1.000	Account
Total	\$ 0.00	Employee
Payment By	<input checked="" type="radio"/> Employee (to reimburse) <input type="radio"/> Company	
Notes...		

- Fill the fields and click <Submit to Manager>

My Expenses to Submit / [CarTRA] Car Travel Expenses / New

Save Discard

Submitted Approved Posted Paid

Expense Report Summary  
[CarTRA] Car Travel Expenses

0 Documents

Employee	Gilles Gravie	Expense Journal	Vendor Bills (USD)
Payment By	Employee (to reimburse)		
Date	Expense Description	Taxes	Total
09/13/2017	[CarTRA] Car Travel Expenses	0	\$ 0.32
Add an item			
0.32			

"You can add more number of items to a same expense bill"

*"Once the expense is **submitted** you can see the status of the expense changes"*

- Finally save the Expense bill.

**Note:-**"Now it has to be **approved** by an officer level user. Posted means the Payslip is posted in Journal and finally **Paid** status indicate the actual Payment. All these state changes can be done by different users. Same Rule is Applicable to Expense Report also."

The screenshot shows a web-based expense reporting application. At the top, there are buttons for 'Save' and 'Discard'. Below them is a toolbar with 'Approve' and 'Refuse' buttons, followed by a status navigation bar: 'Submitted' → 'Approved' → 'Posted' → 'Paid'. The main area is titled 'Expense Report Summary' and contains a placeholder text 'e.g. Trip to NY'. It includes fields for 'Employee' (set to 'Pieter Parker') and 'Payment By'. Below these are tables for 'Date', 'Expense Description', 'Taxes', and 'Total', with a button to 'Add an item'. A document icon indicates '0 Documents'.

### Expense Report Creation (Multiple expense entry in a single bill)

- **Expenses > Expense Reports > Create**
- Click <Add Item> to add single expenses to your bill.

The screenshot shows a modal dialog titled 'Add: Expense Lines'. It features a search bar at the top with a magnifying glass icon and a page number '1-3 / 3'. Below the search bar is a table with columns: Date, Expense Description, Employee, Total, and Status. The table contains three rows of expense data:

Date	Expense Description	Employee	Total	Status
09/13/2017	[CarTRA] Car Travel Expenses	Pieter Parker	\$ 0.32	To Submit
09/13/2017	[CarTRA] Car Travel Expenses	Gilles Gravie	\$ 0.32	To Submit
08/25/2017	Travel by Air	Pieter Parker	\$ 700.00	To Submit

At the bottom of the dialog are buttons for 'Select', 'Create', and 'Cancel'.

- You can either choose an already created expense to your list or you can create new expense by clicking <Create> button
- <Save> the report and <Submit To Manager> for approval

## Approve / Pay / Reject Expense

Expense approval is the duty of concerned department Head/Officer.

### Expenses > To Approve > Expense Report To Approve

- From the list select a submitted expense, scrutinize it and take appropriate action.

The screenshot shows the 'Expense Reports to Approve / Hotel Expenses' screen. At the top, there are buttons for 'Edit', 'Create', 'Print', 'Attachment(s)', and 'Action'. A navigation bar at the top right shows 'Submitted' (1), 'Approved', 'Posted', and 'Paid'. Below this, a sub-navigation bar has 'Approve' and 'Refuse' buttons. The main content area is titled 'Hotel Expenses' and shows details for employee Pieter Parker, payment by employee, and expense journal vendor bills (USD). A table lists one expense: Date 08/25/2017, Description Hotel Expenses, Taxes 0, Total \$ 2,000.00. At the bottom, there are buttons for 'New message', 'Log an internal note', and a following indicator.

## Timesheet management

Time sheets are closely associated with project management. In HR module Odoo gives the feature to prepare **Timesheet** for each employee. The important feature of Odoo timesheet is that, it can integrate with attendance of employee, thus gives an accurate working schedule.

### Create Timesheet

- Timesheet -> My timesheet -> Create

The screenshot shows the 'My Timesheets / New' screen. At the top, there are 'Save' and 'Discard' buttons. A navigation bar at the top right shows 'New', 'Waiting Approval', and 'Approved'. The main content area starts with an 'Employee' field set to Pieter Parker, a 'Timesheet Period' from 09/11/2017 to 09/17/2017, and indicators for 0 timesheets and 0 attendances. Below this, there are tabs for 'Summary', 'Details', and 'Attendances'. The 'Summary' tab displays a grid for the week of Sep 11-17, 2017, with columns for Mon-Sun and a total column. A button 'Add a Line' is located at the bottom left of the grid. A note at the bottom says 'Click to add projects, contracts or analytic accounts.' and 'You will be able to register your working hours and activities.'

- Use dropdown list to select project and click <Add a Line> to add more projects
- Go to **Details** tab to add more details about the timesheet
- <Save> the timesheet and it will be automatically submitted to Manager for approval.

## Approve \ Reject Timesheet

Decision on a submitted timesheet is taken by a managerial level officer. Login as Admin or a managerial level officer to view Timesheet management options

- **Timesheet -> To Approve -> Timesheets to approve**

Select any Timesheet from the list to view Timesheet status. Here you can see attendance of the respective employee is integrated with time sheet for better decision making.

The screenshot shows a web-based application for managing timesheets. At the top, there are navigation buttons: 'Approve' (highlighted in blue), 'Refuse', 'New', 'Waiting Approval' (highlighted in blue), and 'Approved'. Below this, the user's name 'Pieter Parker' is displayed, along with a clock icon and '00:00 Timesheet' and a group icon with '2 Attendances'.

The main area shows a summary of the timesheet period: '09/11/2017 to 09/17/2017'. Below this, there are tabs for 'Summary', 'Details', and 'Attendances' (which is currently selected). Summary statistics show 'Total Attendance' and 'Difference' both as '19:18'. A detailed table then lists individual attendance entries:

Date	Attendance	Total Timesheet	Difference
09/12/2017	19:18	00:00	19:18
09/13/2017	00:00	00:00	00:00
	19:18	00:00	19:18

## Time sheet Report

Concerned officer can view reports on Timesheet from following menu. Detailed analytical view is available in following menu

- **Timesheet > Reports**

The screenshot shows the Odoo HR Timesheet/Attendance Report interface. On the left, there's a sidebar with links like 'My Timesheet', 'Detailed Activities', 'To Approve', 'Reports', and 'Timesheet / Attendance' (which is highlighted). The main area has a title 'HR Timesheet/Attendance Report' and a search bar with filters for 'This Week' and 'Search...'. Below the search bar is a table with columns for 'Total difference', 'Total timesheet', 'Total attendance', and 'Total difference', 'Total timesheet', 'Total attendance' for two dates: '12 Sep 2017' and '13 Sep 2017'. The table includes rows for 'Total', 'Administrator', and 'Undefined'.

	Total difference	Total timesheet	Total attendance	Total difference	Total timesheet	Total attendance	Total difference	Total timesheet	Total attendance
- Total	19:18	00:00	19:18	00:01	00:00	00:01	19:19	00:00	19:19
+ Administrator	19:18	00:00	19:18	00:01	00:00	00:01	19:19	00:00	19:19
+ Undefined	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

## Recruitment Management

The Recruitment process is one of the major challenges for HR Department and Odoo provides Recruitment modules to make ease the process. From Odoo apps we can install plugins related with HR Recruitment. Here we can see three add-ons related with Recruitment process.

The screenshot shows the Odoo App Store interface. It lists three installed modules under the 'recruitment' category: 'Recruitment Process' (Jobs, Recruitment, Applications, Job Interviews), 'Hr Recruitment Interview Forms' (Surveys), and 'Online Jobs' (Job Descriptions And Application Forms). Each module has a small icon and an 'Installed' button.

Here, online jobs plugin installs website module and will create a new page on your website named Jobs. HR Recruitment Interview forms will installs survey module for interview forms.

### Create job Openings

To create a job opening you must login as Admin or designated officer

**Recruitment -> Configuration -> Job Position -> Create**

Or

**Recruitment -> Job Position -> Create**

Job Positions / New

**Save** **Discard**

Stop Recruitment **Recruitment in Progress** **Not Recruiting**

Job Title <b>e.g. Sales Manager</b>	<b>0 Applications</b>	<b>0 Employees</b>	<b>0 Documents</b>
Department	Interview Form	Trackers	Unpublished On Website
Recruitment Responsible Specific Email Address 45.33.78.184	Job Location	YourCompany	
Expected New Employees 1			
Job Description			

- Fill the Job details and publish to Website

Now you can see the Job is listed on your Website under **Jobs Tab**

WEBSITE Content Customize Promote

Website localhost Home Shop Jobs shop2 main Contact us new | Administrator

## Our Job Offers

Join us and help disrupt the enterprise market!

Join us, we offer you an extraordinary chance to learn, to develop and to be part of an exciting experience and team.

**Experienced Developer** 4 open positions  
 1725 Slough Ave., Scranton PA 18540, United States  
 09/14/2017 08:06:57

**Marketing and Community Manager** 3 open positions  
 1725 Slough Ave., Scranton PA 18540, United States  
 09/14/2017 08:06:57

**Consultant**  
 1725 Slough Ave., Scranton PA 18540, United States  
 09/14/2017 08:06:57

**Trainee** 6 open positions  
 1725 Slough Ave., Scranton PA 18540, United States  
 unpublished  
 09/14/2017 08:06:57

## Define Recruitment procedure

Each company have its own recruitment process. You can define your own recruitment stages for recruitment.

## Recruitment > Configuration > Stages > Create

The screenshot shows the 'Stages / New' configuration interface. At the top, there are 'Save' and 'Discard' buttons. Below them, the 'Stage Definition' section includes fields for 'Stage name' (a blue placeholder bar), 'Job Specific' (a dropdown menu), 'Folded in Recruitment Pipe' (a checkbox), and 'Use template' (a dropdown menu). The 'Requirements' section contains a large, empty text area.

*"Use **Job Specific** Dropdown option to restrict the stage to specific job positions"*

## Create Recruitment Form

To choose whichever Survey/questionnaire form to be filled by candidate while applying for job, Activate same option from **Settings** menu.

The screenshot shows the 'Recruitment' settings window. It has an 'Apply' button and a 'Cancel' button at the top. The 'Interview Form' section contains two radio buttons: 'Do not use interview forms' (unchecked) and 'Use interview forms during the recruitment process' (checked).

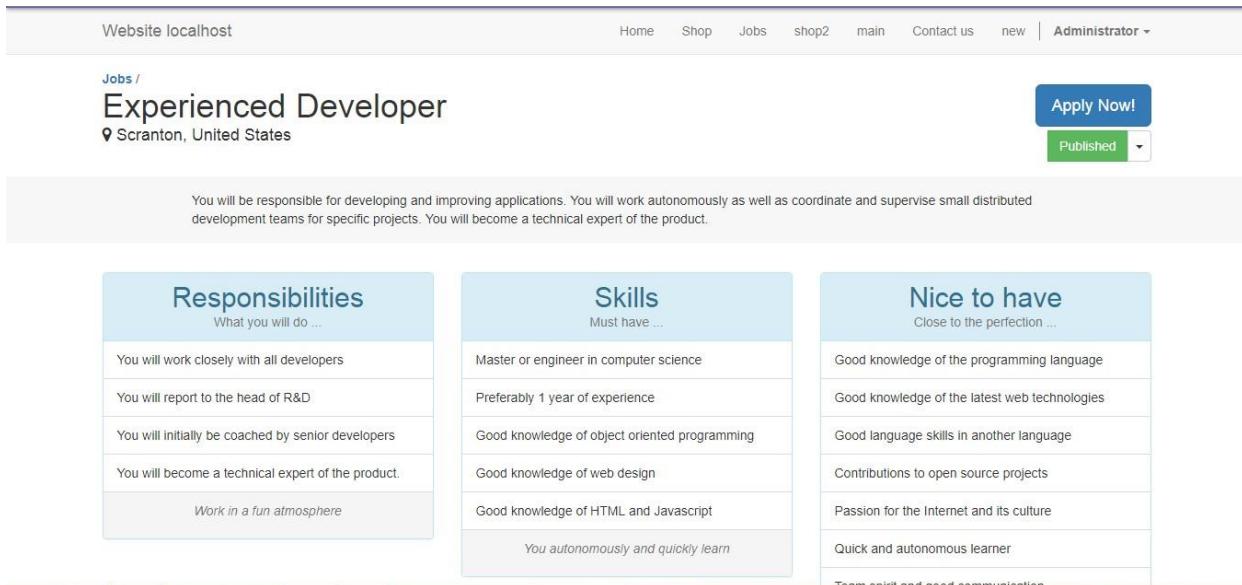
**Once you enable the option you can see an option in Job creation window to add Questionnaires**

The screenshot shows the 'Create: Interview Form' window. It has tabs for 'Design Survey' (selected), 'Draft', 'In progress', 'Closed', and 'Permanent'. The main area is titled 'Survey Title' with a blue placeholder bar. Below it are buttons for 'Edit Pages and Questions' and 'Options'. A table header row shows 'Page Title' and 'Questions'. There is a section for 'Add an item' and a scrollable list below. At the bottom are 'Save' and 'Discard' buttons.

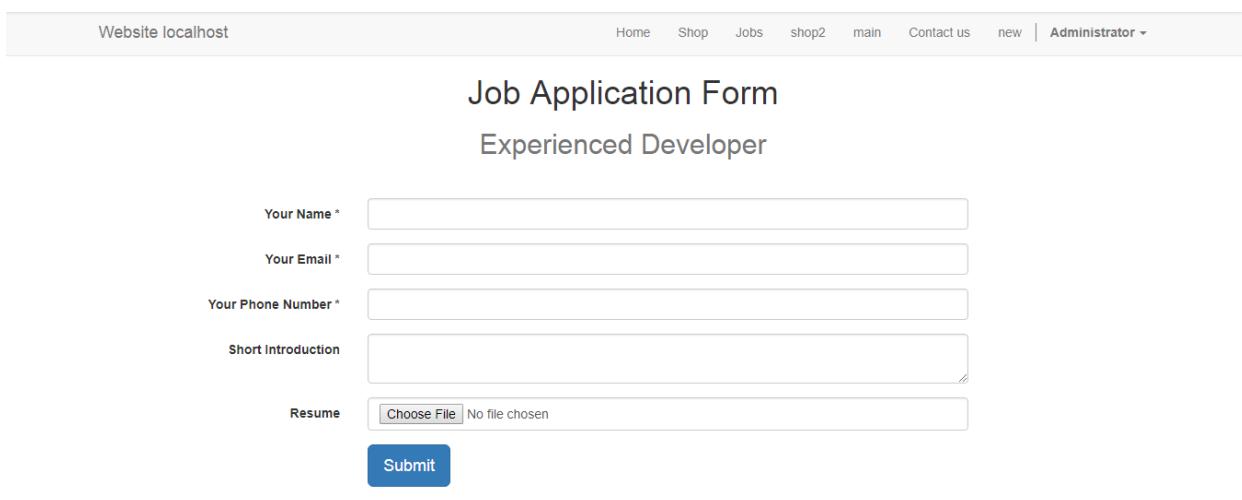
- Use Add an Item to add fields to your form
- After completion <save>

## Apply for job

Odoo provides a complete solution for recruitment process. Once you publish the created opportunities in website, jobseekers can view the same. User can view detailed advertisement and Apply by just clicking on the advertisement.



A screenshot of a job listing page on 'Website localhost'. The top navigation bar includes links for Home, Shop, Jobs, shop2, main, Contact us, new, and Administrator. The job title is 'Experienced Developer' located in Scranton, United States. A large blue button on the right says 'Apply Now!'. Below the title, there is a description: 'You will be responsible for developing and improving applications. You will work autonomously as well as coordinate and supervise small distributed development teams for specific projects. You will become a technical expert of the product.' A green button labeled 'Published' with a dropdown arrow is also present. The main content area is divided into three columns: 'Responsibilities' (What you will do ...), 'Skills' (Must have ...), and 'Nice to have' (Close to the perfection ...). The responsibilities list includes: You will work closely with all developers, You will report to the head of R&D, You will initially be coached by senior developers, You will become a technical expert of the product, and Work in a fun atmosphere. The skills list includes: Master or engineer in computer science, Preferably 1 year of experience, Good knowledge of object oriented programming, Good knowledge of web design, Good knowledge of HTML and Javascript, and You autonomously and quickly learn. The nice-to-have list includes: Good knowledge of the programming language, Good knowledge of the latest web technologies, Good language skills in another language, Contributions to open source projects, Passion for the Internet and its culture, Quick and autonomous learner, and Team spirit and good communication.



A screenshot of a 'Job Application Form' for the 'Experienced Developer' position. The form is titled 'Job Application Form' and 'Experienced Developer'. It contains five input fields: 'Your Name \*' (text input), 'Your Email \*' (text input), 'Your Phone Number \*' (text input), 'Short Introduction' (text area), and 'Resume' (file input field showing 'Choose File No file chosen'). A blue 'Submit' button is at the bottom.

By clicking on <Submit>. User submit his application.

## Process Job Application

Recruitment administrator can view all the application and related personal information listed in his dashboard.

## Recruitment > Job Position

The screenshot shows a grid of job positions. Each job position has a 'Create' button, a search bar at the top right, and a page number indicator (1-8 / 8). The jobs listed are:

- Chief Executive Officer**: Application(s) Interview Form Recruitment Done. Hired Employees: 0 / 1.
- Chief Technical Officer**: Application(s) Interview Form Recruitment Done. Hired Employees: 0 / 1.
- Consultant**: Application(s) Interview Form Recruitment Done. Hired Employees: 0 / 1.
- Experienced Developer**: Application(s) Document(s) Interview Form Recruitment Done. Hired Employees: 0 / 4.
- Human Resources Manager**: Application(s) Interview Form Recruitment Done. Hired Employees: 0 / 1.
- Marketing and Community Manager**: Application(s) Document(s) Interview Form Recruitment Done. Hired Employees: 0 / 3.
- Trainee**: Application(s) Document(s) Interview Form Recruitment Done. Hired Employees: 0 / 1.
- sales**: Application(s) Recruitment Done. Hired Employees: 0 / 1.

- Click **<Application>** View the applicants and their recruitment status.

The screenshot shows a grid of applicants across four stages:

- Initial Qualification**: Enrique Jones, Sales Manager, Marketing and Community Manager, Mobile: 9963214587, 08/15/2017: Send mail regarding our interview, 1 Documents, Rating: ★★★★☆.
- First Interview**: David Armstrong, Finance Manager, Human Resources Manager, 08/18/2017: Send mail regarding our interview, 0 Documents, Rating: ★★★★☆.
- Second Interview**: Jose, Fresher, Trainee, 08/05/2017: Send mail regarding our interview, 1 Documents, Rating: ★★★★☆.
- Contract Proposal**: Marie Justine, Trainee - MCA, Trainee, Mobile: 9988774455, 08/10/2017: Call to define rea, 0 Documentstraining.
- Contract Proposal**: Shane Williams, Programmer, Experienced Developer, Mobile: 9812398524, 08/24/2017: Send mail regard, 1 Documents.
- Contract Proposal**: Tina Augustie, Trainee - MCA, Trainee, Mobile: 9898745745, 08/15/2017: Send mail regard, 0 Documents.

- Just drag and drop to change the status of employees

## Odoo Point of sales

The shopping and consumption characteristics of consumers are changing rapidly. Unlike in the past, the customers don't have much time to spend in shops to find their desired product. Consequently, E-commerce sales are rising. Modernization and digitalization in every possible point will make shopping more interesting and hassle-free. 'Point of Sale' is an opportune place where you can utilize this digitalization technique to give an excellent customer experience. POS is the place at which a retail transaction is carried out. Generally, billing and final adjustments are made at this point. Odoo POS module combined with hardware components like the barcode scanner, POS box, etc. perform the sales procedure.

Most of the present ERP systems provides Point of Sale option with varying configurations. Apart from speedy billing option, an excellent POS can facilitate functionalities like, discount and Loyalty programs support, multiple payment type support, serve multiple customers at a time and customer specific management, Accounting etc. To enable features like this, a POS system must be integrated with CRM, Inventory, Accounting and other necessary modules in the ERP. The detailed analysis report is another must-have feature in every POS system. Sales analysis on each POS is the key factor to take sales improvement decision.

Odoo POS is an excellent ERP were you can find all these features by default. Moreover many add-ons and apps from Odoo app store further enhance the capabilities of Odoo POS like in every other module. The Simple and user-friendly interface of Odoo Point of sales module lets the user configure and complete his all sales needs with hassle-free steps.

Some of the feature [15] which makes Odoo a well performing POS app are;

- **Payments**

- Payment methods***

- Cash, checks, and credit card payment methods are available. New types of payment methods can be added as well.

- Credit/Debit cards***

- All electronic payments are handled by external payment terminals.

- Split tenders***

- A single order can be paid as a split payment between multiple parties as well as with separate payment methods.

- Currency rounding***

- Prices and payments can be rounded to the smallest denomination of the currency.

- Offline payments***

- Orders made offline are automatically synchronized when you are reconnected.

- Invoicing***

- Generate and print invoices for your business customers.

### ***Accounting***

Payments are directly integrated into Odoo Accounting to make bookkeeping simple and reliable.

### ***Customer tips***

Supports customer tipping either as an added amount or by converting change to a tip.

- ***Checkout***

#### ***Prices & discounts***

Set customer prices or offer percentage-based discounts on either a single product or the entire order.

#### ***Parallel orders***

Put orders aside and process multiple orders at the same time.

#### ***Customized receipts***

Advertise your current promotions, hours of operation, and upcoming events on your printed receipts.

#### ***Weighting at the counter***

Calculate product weight during checkout with the electronic scale integration.

#### ***Blazing fast search***

Quickly find your customers and products with the built-in search features.

#### ***Sell on the move***

With iPad and Android tablet support, sell anywhere within your store or restaurant.

#### ***Dynamic barcodes***

Embed price, weight, and discount information directly into your barcodes.

- ***Store Management***

#### ***Order history***

View all past orders as well as search by customer, product, cashier, or date.

#### ***Daily sales***

Keep track of daily sales and totals for every payment type.

#### ***Cashier accounts***

Manage multiple cashier accounts and secure them with badges or pin codes.

#### ***Cash flows***

Monitor cash register adjustments and easily verify cash contents at the end of the day.

#### ***Stock & Inventory***

Monitor your stock in real-time, manage your inventory across all locations, and review shipments with the Odoo Stock integration.

#### ***Franchises***

Pre-configure your franchises stores, overview their sales, and centrally manage their stock and accounting.

- **Customer & Loyalty**

#### ***Register customers***

Identify your customers by simply registering their email and contact address, allowing you to offer discounts and keep track of individual sales.

#### ***Identify customers***

Look-up your customers with the built-in search feature or identify them with a barcode printed on their loyalty card.

#### ***Business Customers***

Register your customer's VAT number and apply them to invoices.

#### ***Loyalty Cards***

Reward your customers with loyalty points and exchange them for gifts or discounts. Points can be earned by product, by order, or by sale amount.

- **Restaurant Management**

#### ***Floor plans***

Assign orders to tables and receive an overview of your restaurant's floors as well as make changes on the go with the graphical editor.

#### ***Manage seating***

Keep track of your guests with an overview of your restaurant's capacity and table availability.

#### ***Kitchen printing***

Send the order instructions to the bar and kitchen printers. Instructions can be sent to different printers automatically based on the product category.

#### ***Delayed orders***

Take orders for different courses of the meal at once with the ability to send them to the kitchen printer at separate times.

#### ***Kitchen order notes***

Add notes for customer's preferences, allergies, or special requests and send them to the kitchen or bar printers.

#### ***Split bills***

Let customers pay separately or at different times by splitting orders.

- **Products**

#### ***Product categories***

Organize your products with hierarchical product categories. Order them by popularity and display different categories in different point of sales.

#### ***Product Search***

Quickly find products by their name, barcode, or description with the built-in search function.

### ***Units of measure***

Sell your products with custom or preset units of measure and update your stock accordingly.

### ***Multiple barcodes***

Configure multiple barcodes for the same product with barcode nomenclatures.

### ***Product variants***

Sell different sizes, colors, or configurations of the same product with product variants.

### ***Large product count***

Odoo's Point of Sale system is capable of performing at a scale of over 100,000 products.

- ***Web Application***

#### ***Browser support***

Odoo POS is a web-based application and can be deployed on any device and OS running Chrome, Firefox, or Safari. Microsoft Windows, Apple OSX, Linux, Android, and iOS are all supported operating systems.

#### ***PC compatible***

Odoo POS can also be used on standard PCs and tablets as well as industrial touch-screen terminals.

#### ***Works offline***

Odoo's POS will keep working while offline. The web browser can be closed offline without loss of data.

#### ***HTML5 mods***

Odoo's POS is Open-Source and can be customized with HTML5/JS extension modules [15]

By default, there are two types of user in Odoo POS module. Admin can create and assign this role to any of his employees.

- Manager

He has complete control over all the POS nodes. He configures, monitor and manage it. He creates a POS and assigns it to any user. He can also Add and Update product information.

- User:-

This user will have access to only those POS assigned to him. He can log in to his POS and start the session.

## How Odoo POS works

Manager creates and configures each POS nodes in Odoo POS. The system administrator can assign this POS node to appropriate users from ‘Point of Sale’ tab in the user profile. When a POS user login to the system, he will be directed to his POS dashboard. From there he can perform sales operations. A user must start a new session or resume an existing session to perform sales operations. Moreover, a user cannot use two Point Of Sale sessions simultaneously. The important point to note in Odoo POS is that the Point Of Sale session must be closed and validated in order to generate all the accounting entries. When a salesperson close and validate his session the respective entries will be passed to accounting module, from here, the authorized person can commit the transactions made.

Some other distinctive feature of Odoo POS is listed below.

## Basic Configuration

### Setting up new payment method

To add new payment method to your POS system follow the steps.

- Click <Payment Methods>option under Configuration tab, and click on <Create> button, which will guide you to the following window

The screenshot shows the 'Payment Methods / New' configuration window. At the top left are 'Save' and 'Discard' buttons. The main area has three tabs at the bottom: 'Journal Entries' (selected), 'Advanced Settings', and 'Point of Sale'. The 'Journal Name' field is empty. The 'Type' dropdown is set to 'Cash'. Below these are 'Short Code' and 'Default Debit Account' fields. The 'Default Credit Account' field is empty. The window has a light gray background with blue highlights on input fields.

Click <Advanced Settings>, <Point of sale> tabs to find more customizable options.

## Creating new product category

Your product list can be customized/categorized according to your needs. To create a new product category follow the below procedures

- Click <POS Product Categories> option under Configuration tab, and click on <Create> button, which will guide you to the following window

The screenshot shows a software interface for creating a new product category. At the top, there are three blue circular icons. Below them, a toolbar with 'Save' and 'Discard' buttons. The main area is titled 'Pos Product Categories / New'. It contains three input fields: 'Name' (with a placeholder icon), 'Parent Category' (a dropdown menu), and 'Sequence' (a numeric input field set to 0). The background has a light grey grid pattern.

- Fill all the fields and <save> new category.

**Note:** - “you can delete or edit any particular category from the same menu.”

## Creating new Point of Sale

You can create any number of point of sales. When you create a user you can see an option to assign a POS to the user.

- Click <Point of Sale> option under Configuration tab, and click on <Create>, button, which will guide you to the following window

The screenshot shows a software interface for creating a new point of sale. At the top, there are three blue circular icons. Below them, a toolbar with 'Save' and 'Discard' buttons. The main area is titled 'Point of Sale / New'. It contains several configuration options:

- Point of Sale Name:** A text input field containing a placeholder.
- Sale Journal:** A dropdown menu set to 'POS Sale Journal (USD)'.
- Group Journal Items:** A checked checkbox.
- Default Fiscal Position:** A dropdown menu.
- Invoice Journal:** A dropdown menu set to 'Customer Invoices (USD)'.
- Barcodes:** A dropdown menu set to 'Default Nomenclature'.
- Fiscal Positions:** A dropdown menu.
- Active:** A checked checkbox.

Below these settings is a section titled 'Available Payment Methods' with a table:

Short Code	Journal Name	Type
Add an item		

- Fill all the necessary fields including Journal, payment methods for POS etc. and click <Save>.

## Adding new products to list

To Add new products to your list follow the below procedures

- Click <Product> option under <Orders> tab, and click on <Create>, button, which will guide you to the following window

The screenshot shows the 'Products / New' window. At the top, there are 'Save' and 'Discard' buttons. The main area has a 'Product Name' field containing 'Product Name'. Below it are checkboxes for 'Can be Sold', 'Can be Purchased', and 'Can be Expensed'. To the right is a summary table with columns for Active (Active), Unpublished On Website (Unpublished), Traceability (Traceability), Bill of Materials (0), Manufacturing (0), and Sales (\$ 0). Below this are tabs for General Information, Inventory, Sales, Invoicing, and Notes. Under 'General Information', there are sections for Routes (Buy, Manufacture, Make To Order) and Weight (0.00). Under 'Inventory', there are sections for Tracking (By Unique Serial Number, By Lots, No Tracking) and Volume (0.00). At the bottom is a 'Vendors' section with a table for adding items.

Active	Unpublished On Website	Traceability
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bill of Materials 0	Manufacturing 0	Sales \$ 0

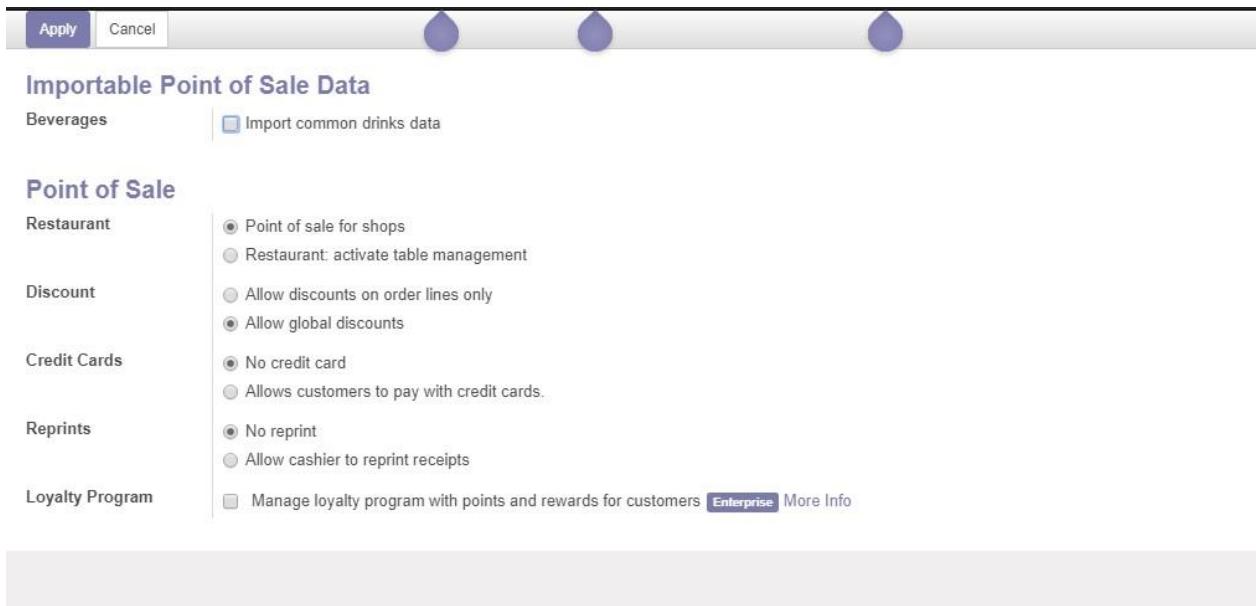
Vendor	Minimal Quantity	Price	Start Date	End Date
Add an item				

Fill the fields with product specification. Toggle between **General Info**, **Inventory**, **Sales**, and **Invoice** tabs to find more options and settings for the product and <save>.

**Note:** - “you can edit details of any particular product from the same menu (i.e. <Product> option under <Orders> tab) by clicking the image of respective product”

## Other miscellaneous configurations.

You can find some useful and important settings like activating card payment, activating restaurant mode, etc. in <settings> menu under <Configuration> Tab



### POS Restaurant mode configuration

- Find Activate table management option from <settings> menu under <Configuration> tab.

## Point of Sale

### Restaurant

- Point of sale for shops
- Restaurant: activate table management

### Floor and Table planning in Restaurant

Customize the floor and seating arrangement in your restaurant (this option will be available only after activating Restaurant configuration as in sec. 2.1)

- Click <Floor Plans> option under Configuration tab, and click on <Create>, button, which will guide you to the following window

Floor Plans / New

**Save** **Discard**

Floor Name	Point of Sale	
Background Color	rgb(210, 210, 210)	
Table Name	Seats	Shape
Add an item		
<input type="button" value="Add an item"/>		

- Click <Add an Item> to add Tables and manage seating arrangements on that floor.

**Note:** - “you can edit details of any particular Table/Floor from the same menu (i.e. <Floor Plans> option under <Configuration tab>).

### Add new Printer

Attach new printer to your POS (this facility is available only after you have activated restaurant mode).

- Click <Product> option under Orders tab, and click on <Create> button, which will guide you to the following window

Order Printers / New

**Save** **Discard**

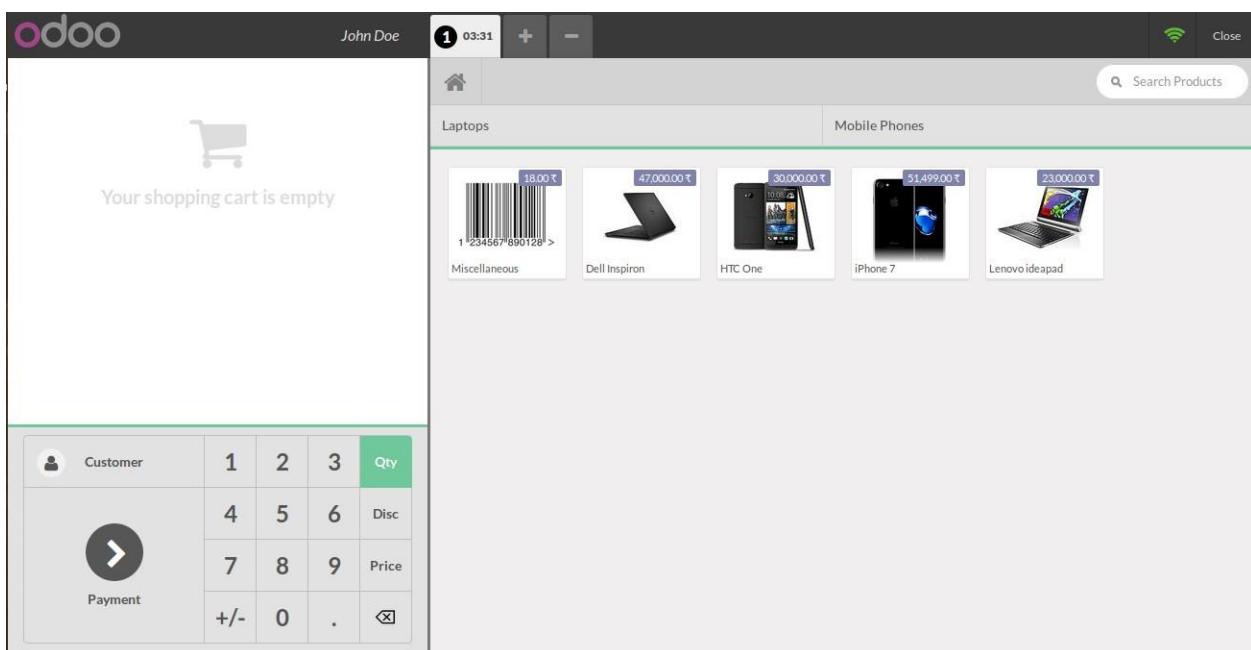
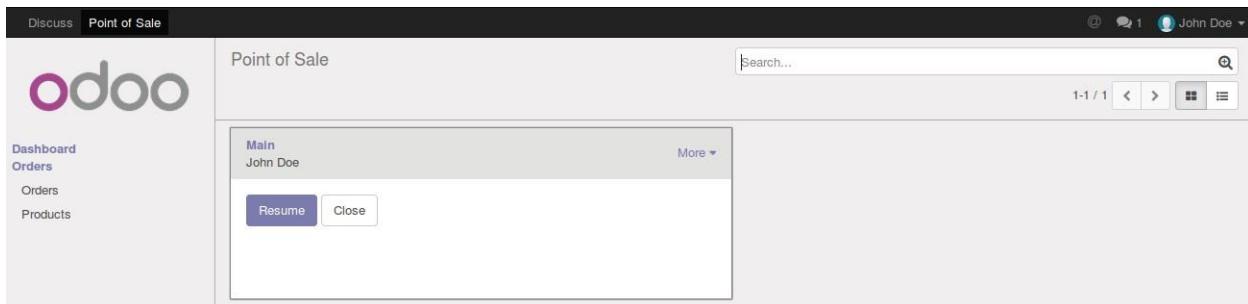
Printer Name	Printer
Proxy IP Address	
Printed Product Categories	Display Name
Add an item	
<input type="button" value="Add an item"/>	

Fill the fields with printer info and <save>.

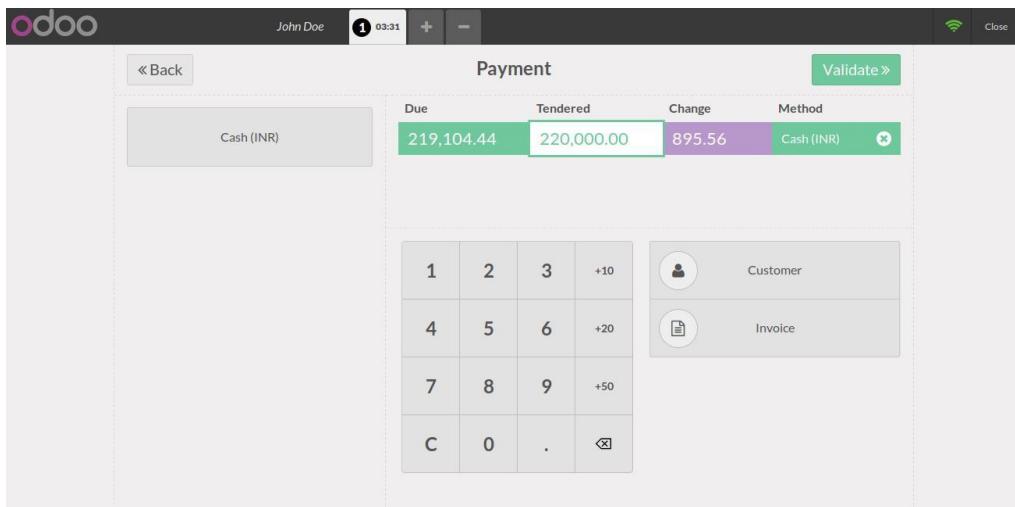
# Sales management

## Making an Order

- Once the user you login to POS, the main dashboard will be like below. <Create> a new Session or <resume> an existing Session to make an order



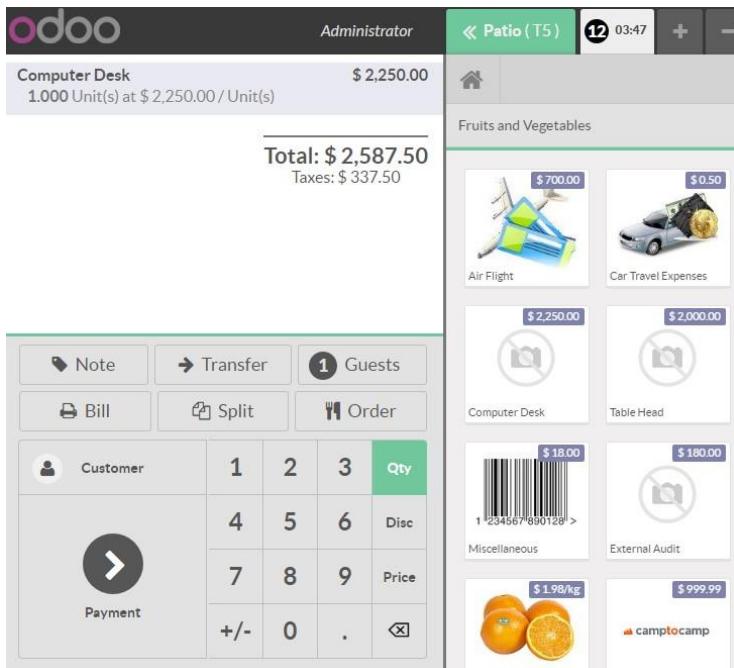
- Click on the product to add to Cart (the amount will be updated automatically)
- Use <QTY> button to enter no of quantities
- Use <Price> button to enter price manually
- Use <Disc> button to allow discount
- Click on <Payment> button to proceed to payment.



- Choose the payment method from list.
- Click <Validate> to generate invoice. Or you can
- Click on <Customer> to select a customer from your system
- Use <Invoice> option to generate invoice against the customer.
- Once the validate button is clicked system generate invoice.

### Making an Order (Restaurant Configuration)

- Select the Table/Floor from the list
- Click on the product to add to Cart (the amount will be updated automatically)



- Use <Split> option to split bill
- Use <Transfer> option transfer the table
- If completed, proceed to <Payment>option
- You can choose <Customer> option to generate bill against an existing customer

Print the receipt and Click <**Next Order**> to make another order. Click <**Close**> button to close the session.

## Reports Generation

- Select <**Order**> option under <Reports> tab to generate Order report.
- Select <**Sales**> option under reports tab to generate sales details of a particular time period.

# Odoo Website Builder

With the help of Odoo website builder you can to develop stunning websites without much effort. This feature enables any normal user to develop his own company's online presence. The website serves multiple purposes for your company. On the one hand it publishes information about your company and on the other hand, it can act as E-commerce site (See E-commerce module), HR Recruitment Portal (See HR module), and Customer portal (See Project management). You can explore these features from those modules. Here we will be discussing basic website builder functionalities. Following are some features [16] of Odoo Website builder.

- **Intuitive system**

***What you see is what you get***

Insert text styles like headers, bold, italic, lists and fonts with a simple WYSIWYG editor.

Flexible and easy to use.

***Building blocks system***

Create your page from scratch by dragging and dropping pre-made, fully customizable building blocks.

***Front end management***

Click and change content directly from the front end: no complex back end to deal with.

***Word processor text editing***

Create and update your text content through an editor designed to replicate the word processor experience.

- **Increase visits**

***Promote Tool***

Improve your ranking on search engines and your organic traffic thanks to keywords suggestions and Meta tag tool.

- **Convert leads**

***A/B test your pages***

Run several versions of one page to find out which one drives better results. Analyze results directly on Google Analytics.

***Multi-version***

Prepare multiple versions of your website and switch from one to another in one click.

***Link tracking***

Add a tracking code to your URL's and measure all your marketing campaigns from the first click to the final sale. Identify which campaigns are the most effective in attracting visitors to your website and generating revenue.

- **Enhance user experience**

***Translation tool***

Get professional standard translations with Gengo integration.

***Mobile preview***

See what your page will look like on a mobile device with the mobile preview button.

***Social media call-to-action***

Share your pages through social media networks.

***Live chat embedded***

Provide your visitors with information in real time directly on your website through a popup chat window.

- **Design features**

***Bootstrap based templates***

Easily design your own Odoo templates thanks to clean HTML structure and bootstrap CSS.

***Fluid grid layout***

Create the best layout corresponding to the devices on which the website is displayed.

***Professional themes***

Change theme in just a click, and browse through Odoo's catalog of ready-to-use themes available in our app store. [16]

## **System Users**

By default, there are two types of user in Website related modules.

- Editor and Designer:

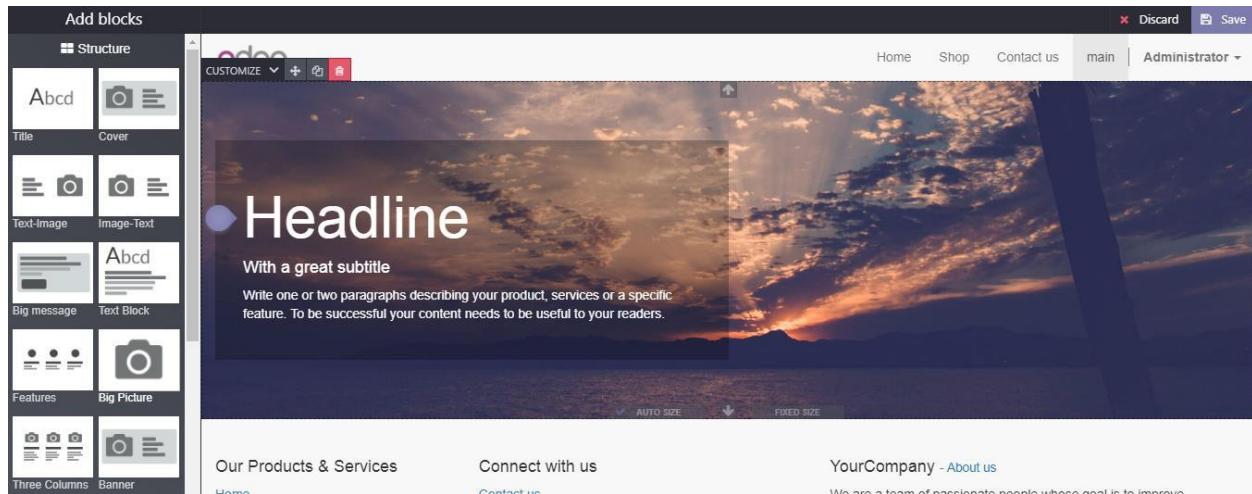
Like manager in other modules, he can access both frontend and backend of your Website. He configures your website and changes its settings like setting up payment gateway, giving portal access to customers etc.

- Restricted Editor:-

Basically front end (i.e. portal) designer. Generally, he can alter only the portal view of the site.

# Add your first Page

- Login as administrator
- Click <New> button on top right corner,
- Enter page name and click <Continue>



It will give you a default page and tools to design the page just **Drag and Drop the contents**

Click on any element to customize it

- Use the different design tools to make your website more attractive

**Don't forget to save the current design once you finished**

- To get mobile view of the website you can click, mobile preview button which is in the top left Side of menu bar.
- Once you save the page, the page will be displayed on 'Menu bar'

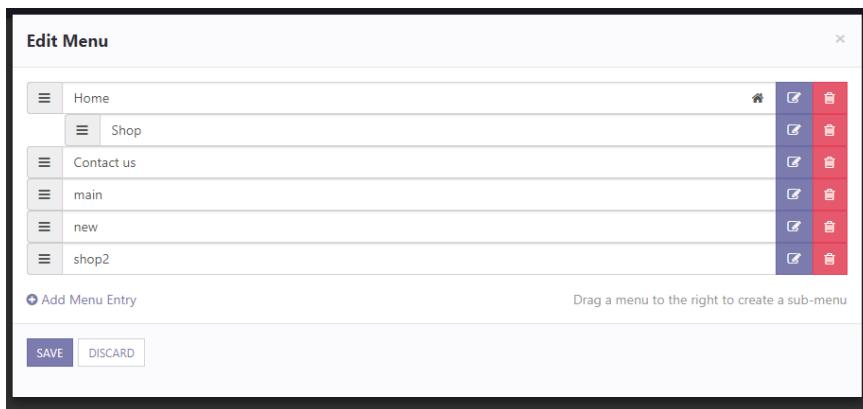


# Customize menu and appearance

## Menu and page customization

You can change the appearance of your website including Menu, and product view easily. To customize menu follow

- **Website > Content > Edit Menu**

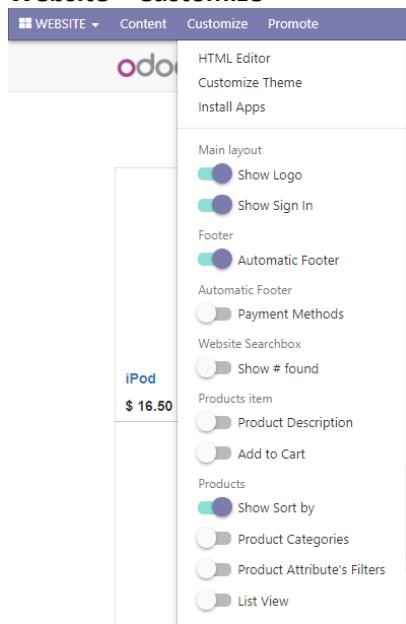


This window will assist you to create new menu options, create submenu and delete menu options.

## Appearance customization

To change the appearance of the website like the way your products are listed etc. follow

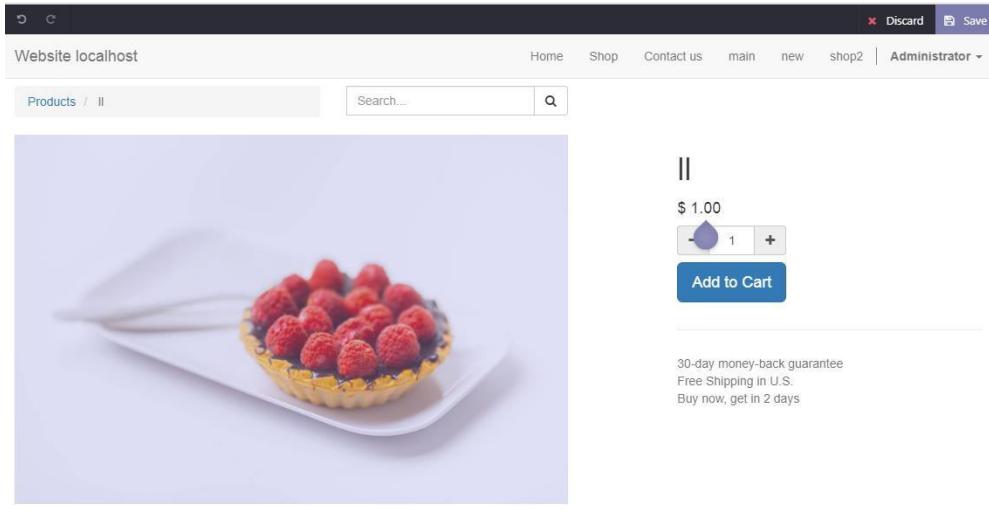
### Website > Customize



Choose from many of the useful options available to make your website more user-friendly

# List your products on site

- Website > New > New product

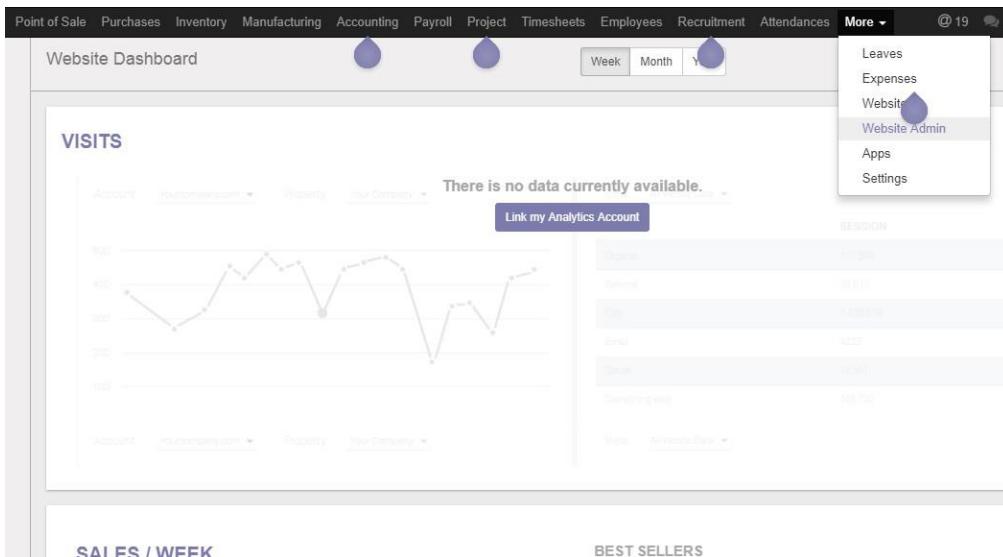


- Fill the name, image and cost and click <Save>

## SEO Integration

Odoo SEO tools combine with Google to check the relevancy of your content in real time. Get more visitors with a better-targeted content. Admin can access this facility from

- Website Admin > Settings



Here you can see the options to track and manage performance of your Website. And you can access some other settings from

- **Website > Promote > Optimize SEO**

**Promote This Page** Get this page efficiently referenced in Google to attract more visitors. ×

---

**1. Define Keywords** describing your page content

Add keyword:

Language: English ▾

Most searched topics related to your keywords, ordered by importance:

**2. Reference Your Page** using above suggested keywords

Title

Description

**3. Preview** how your page will be listed on Google

---

## E-commerce

This feature make Odoo more powerful than any other competitor. Odoo E commerce App supports you to sell your products online. You can design your own site with simple steps. Add products, configure payment and delivery methods and let public to access your site, all in simple steps. Since it is integrated with other modules like CRM, Sales, and Inventory Odoo can provide an effective platform for your business. You just have to install the eCommerce application from Odoo apps store. To further enhance the system capabilities you may install eCommerce delivery, and eCommerce optional products.

Odoo E-commerce module displays competitive features when compared to CMS service providers like Magento and Shopify. The most promising thing is that many add-on features in other CMS service providers are built in components in Odoo. Odoo enjoys the advantage of features like Product Inline Page Builder, Drag and Drop Page Builder, Buy Without Sign Up, Inline SEO Suggestion, Link tracker etc. over Magento. And over Shopify, Odoo has the advantage of options like Stock Available, Drag and Drop Page Builder, Integrated A/B testing, Inline SEO Suggestion, Multi Store Support, Advanced Taxes etc.[17]

Some of the useful features [18] of Odoo are below.

- **Design & configure**

***Inline Editing***

Create product pages using Odoo's unique 'edit inline' approach. No code required, what you see is really what you get.

***Building blocks system***

Create your product page from scratch by dragging and dropping pre-made, fully customizable building blocks. Describe products in a table to give maximum of specifications.

***Sell digital products***

You can now add digital products like eBooks to your online catalog.

***Word processor text editing***

Easily create and update your text content through an editor designed to replicate the word processor experience.

***Product variants creation***

Create a product available in several variants, like size, colors or other attributes.

***Price-lists, products and stores***

Create flexible price-lists, add variants to add to products options, and create multiple stores under one environment. Display available stock on products.

- **Integrated tools**

***Cross-selling and Upselling***

Suggest optional products related to items to increase your revenues.

***Promotional or coupon codes***

Encourage potential customers using promo codes and coupons.

***Options to boost sales***

Define product categories, use attribute search, focus on promotions, coupons or gift certificates and push best products to the top of your page in order to multiply your sales.

- **Shopping experience**

***Easy search system***

Make finding products easier by setting attributes on products (size, color, power, etc.).

***Customer on boarding***

Setup step by step instructions to help customers go to checkout with no blocking issues.

***Guest & registered user***

Customers can choose to create a user profile or as guests. Registered users can retrieve their contact information upon check out and access a portal including related messages, orders, invoices, registered claims, etc.

***Skip shipping address***

Shipping address no more required when providing only services.

***Live chat embedded***

Provide your visitors with information in real time directly on your website, and secure your sales.

***Easy checkout process***

Simple checkout to avoid losing clients.

***Customer portal***

Access tracking of orders, advanced shipping rules and return management through the customer portal.

***Order review***

See details of your order at the end of the process.

- **Payment methods**

***Fully integrated***

Allow customers to pay with Paypal, Ogone, Adyen, Buckaroo, Authorize.net and SIPS Wordline. Online payment methods redirect customers to a 'Thank you' page on your website.

- **Billing & Accounting**

### **Calculate & Bill Shipping Costs**

Get delivery costs computed automatically using Odoo's embed Delivery Method configurator.

### **Integrated Accounting package**

Odoo's chart of accounts contains national taxes, fiscal positions, accounts.

### **Tax rates**

Fiscal positions allow you to adapt tax rates to the whereabouts of your customers.

### **Chart of accounts**

Use the Custom package template to build your own chart of accounts. It embeds a set of generic preset accounts, taxes and more.

- **Reporting**

### **Sales data analytics**

Highlight the best product in terms of quantity sold. Find the best customer in terms of revenue. Display a graph with your monthly sales per product and add it to your Dashboard. Group your Sales by Partner and display the products in the column header.

[17]

## System Users

By default there are two types of user in Website related modules.

- **Editor and Designer:** Like manager in other modules he can access both front end and back end of your website. He configure your website and change its settings
- **Restricted Editor:** - Basically front end (i.e. portal) designer. Generally he can alter only the portal view of the site and products with some restriction etc.

## Product Management

### Add new Product

#### Website Admin > Products > Create

The screenshot shows the Odoo Website Admin interface for creating a new product. The main form has the following fields:

- General Information:**
  - Product Name: **Product Name**
  - Can be Sold:
  - Can be Purchased:
  - Can be Expensed:
- Inventory:**
  - Sale Price: 1.00
  - Cost: 0.00
  - Control Purchase Bills:  On ordered quantities  On received quantities
- Invoicing:**
  - Active:
  - Published On Website:
  - Traceability:
  - Bill of Materials: 0
  - Manufacturing: 0
  - Purchases: 0
  - Sales: \$0

Fill all necessary fields by switching to ‘inventory’, ‘sales’, ‘variants’, ‘invoicing’, tabs and <save> the product. It will be added to your website

## Edit Product Details

You can **Update/Edit** a product details buy just clicking on the product image from

- **Website Admin > Products**

The screenshot shows the Odoo Website Admin interface for managing products. The top navigation bar includes 'Products / [E-COM08] Apple In-Ear Headphones' and buttons for 'Edit' (highlighted), 'Create', 'Print', 'Attachment(s)', and 'Action'. A progress indicator '1 / 7' is shown with navigation arrows. Below the header, there are tabs for 'Update Qty On Hand' and 'Procurement Request'.

The main content area displays the product details for 'Apple In-Ear Headphones'. It features a thumbnail image, the product name, and several status indicators:

<input checked="" type="checkbox"/> Can be Sold	<input checked="" type="checkbox"/> Published On Website	18 On Hand
<input checked="" type="checkbox"/> Can be Purchased	<input type="checkbox"/> Traceability	<input checked="" type="checkbox"/> Reordering R...
<input type="checkbox"/> Can be Expensed	<input type="checkbox"/> Bill of Materials	<input type="checkbox"/> Manufacturing
	<input type="checkbox"/> Purchases	<input type="checkbox"/> Sales

Below these are tabs for 'General Information', 'Inventory', 'Sales', 'Variants', 'Invoicing', and 'Notes'. The 'General Information' tab is selected, showing the following data:

Product Type: Stockable Product	Sale Price: \$79.00
Internal Reference: E-COM08	Cost: \$70.00
Barcode	Control Purchase Bills
Internal Category: All / Saleable / Physical	On received quantities

At the bottom of the screen, there are buttons for 'New message', 'Log an internal note', 'Following' (with a bell icon), and a user count '1'.

- Click <Edit> button to edit product info
- <Update Quantity in Hand> to update quantity manually

## Add new Product Category

To add new product category go to

**Website Admin > Configuration > Website Product category > Create**

The screenshot shows the Odoo Website Admin interface for creating a new product category. The top navigation bar includes 'Website Product Categories / New' and buttons for 'Save' (highlighted) and 'Discard'.

The main form has fields for 'Name' (with a placeholder 'Category'), 'Parent Category' (a dropdown menu), and 'Sequence' (a numeric input field set to 0).

Choose the parent category (if applicable) and save

Edit Product Category

Delete or Edit a product category

**Website Admin > Configuration > Website Product category**

- Click on any of the listed category to update or delete it

The screenshot shows a list of website product categories. At the top, there are buttons for 'Edit' and 'Create'. Below the header, there are two blue waterdrop icons. On the right side of the header, there are buttons for 'Attachment(s) ▾', 'Action ▾', and navigation arrows ('1 / 16 < >'). The main content area displays a single category entry for 'Laptops'. It includes a placeholder image icon, a table with three columns: 'Name' (Laptops), 'Parent Category' (empty), and 'Sequence' (1). There is also a large empty white box below the table.

## Order Tracking

### View Order

To view orders received to you web site

**Website Admin > Orders > Order**

The screenshot shows the 'eCommerce Orders' page. At the top, there are buttons for 'Create' and 'Import'. To the right of these buttons is a search bar with a magnifying glass icon and the text 'From Website x Search...'. Below the search bar, there is a large blue arrow pointing upwards towards the 'Create' button. A text box below the arrow says 'Click here to add new document'. Another text box below that says 'You don't have any confirmed order from the website.'.

**Note:** - There is an option to create order manually if needed.

## View Unpaid Order

- Website Admin >Orders > Unpaid Order

The screenshot shows the Odoo website administration interface. The top navigation bar includes links for Discuss, Calendar, Sales, Point of Sale, Purchases, Inventory, Manufacturing, Accounting, Payroll, and Project. On the left, a sidebar menu lists various categories: Dashboard, Orders (Orders, Unpaid Orders), Abandoned Orders, Invoices, Catalog (Products), Configuration (Settings), and eCommerce (Website Product Catego..., Payment Acquirers). The 'Unpaid Orders' option is highlighted with a purple background. The main content area is titled 'Unpaid eCommerce Orders' and features a 'Create' button and an 'Import' button. A large blue curved arrow points from the 'Unpaid Orders' link in the sidebar up towards the 'Create' button. Below the buttons, there's a message: 'Click here to add new document' and 'You don't have any unpaid order from the website.'

## Website Settings

If we navigate to **website admin > Configuration > Settings**, then we can see more option that we can enable in our website, now let us look into it.

The screenshot shows the Odoo configuration settings for the eCommerce module. The left sidebar lists sections: Multi Images, Optional Products, Pricing Strategy, Sales Price, Shipping Management, Shipping Connectors, Merchant Connectors, and Order Confirmation Email. The right pane contains specific configuration options for each section. For example, under 'Multi Images', there are radio buttons for 'One image per product' (selected) and 'Several images per product'. Under 'Optional Products', there are radio buttons for 'One-step "add to cart"' (selected) and 'Suggest optional products when adding to cart (e.g. for a computer: warranty, software, etc.)'. Under 'Sales Price', there are radio buttons for 'A single sales price per product' (selected) and 'Several prices selectable through a drop-down list or applied automatically via Geo-IP'. Under 'Shipping Management', there are radio buttons for 'No shipping management on website' (selected), 'Delivery methods are only used internally: the customer doesn't pay for shipping costs', and 'Delivery methods are selectable on the website: the customer pays for shipping costs'. Under 'Shipping Connectors', there are checkboxes for UPS integration (Enterprise), FedEx integration (Enterprise), Temando integration (Enterprise), USPS integration (Enterprise), DHL integration (Enterprise), and eBay connector (Enterprise). A 'More Info' link is also present. Under 'Order Confirmation Email', there is a link to 'Sales Order - Send by Email'.

E.g.: Multiple image enabled product. (Settings 1)

Products / Imac

Edit Create Print Action

 **Imac**

Can be Sold  
 Can be Purchased

General Information Sales Invoicing Notes Images

 Imac  Imac

 Imac

**Active** Published On Website

(Adding multiple images)



User view of a multiple image enabled product

Like ways administrator change the settings to improve user experience from the above panel

## Set up delivery options

**Inventory > Configuration > Delivery > Delivery Methods.**

(To view this option you must activate delivery methods are selectable on the web site option from settings)

Delivery Methods / New

Name: e.g. UPS Express

Provider: Fixed Price

Margin: 0 %

Description: Description displayed on the eCommerce and on online quotations.

Pricing: Fixed Price 0.00

Destination:

Status: Active | Unpublished On Website

**Fixed Price** and **Based on Rules** two option available to set up payment option. Using **Based on Rules** option you can customize delivery method.

Open: Pricing Rules

Condition: Price >= 100.00

Sale Price: 100.00 + 2.00 \* Weight

Margin: 10 %

Save | Discard

**Note:-** the very important things is that you must click 'Published on Website' button before you quit the wizard to make the new delivery option available to users

## Configure Payment methods

- Website Admin > Configuration > E-commerce-> Payment Acquires

We can install the required payment methods from here

The screenshot shows a grid of payment acquirer configurations. Each row contains a title, a brief description, a logo, and an 'Install' or 'Configure' button.

- Buckaroo**: A payment gateway to accept online payments via credit cards. ✓ eCommerce. **SECURE with BUCK-ROO** logo. **Install** button.
- Adyen**: A payment gateway to accept online payments via credit cards, debit cards and bank transfers. ✓ eCommerce. **adyen** logo. **Install** button.
- Ingenico**: Ingenico Payment Services (formerly Ogone) supports credit cards, debit cards and bank transfers. ✓ eCommerce, ✓ Cards storage, ✓ Pay button in emails. **ingenico** logo. **Install** button.
- Authorize.net**: A payment gateway to accept online payments via credit cards and e-checks. ✓ eCommerce, ✓ Cards storage, ✓ Authorize & Capture. **Authorize.Net** logo. **Install** button.
- Sips**: A payment gateway from Atos Worldline to accept online payments via credit cards. ✓ eCommerce. **worldline** logo. **Install** button.
- Stripe**: A payment gateway to accept online payments via credit cards. ✓ eCommerce. **stripe** logo. **Install** button.
- Paypal**: PayPal is the easiest way to accept payments via Paypal or credit cards. ✓ eCommerce, ✓ Pay button in emails. **PayPal** logo. **Test** button, **Configure** button.
- PayUmoney**: PayU India is an online payments solutions company serving the Indian market. ✓ eCommerce, ✓ Subscription, ✓ Pay button in emails. **PayUmoney** logo. **Install** button.
- Wire Transfer**: Provide instructions to customers so that they can pay their orders manually. ✓ eCommerce. **Test** button, **Configure** button.
- Custom**: A generic acquirer payment acquirer. ✓ eCommerce. **Test** button, **Configure** button.

- Click <Configure>

The screenshot shows the configuration details for the Paypal provider. It includes fields for Paypal Email ID, Paypal Merchant ID, and a checked 'Use IPN' checkbox. There is also a link to 'How to configure your paypal account?'.

Payment Acquirers / Paypal

Save Discard 7 /

Provider: Paypal

Credentials Messages Configuration

Paypal Email ID: dummy

Paypal Merchant ID: dummy

Use IPN:

How to configure your paypal account?

Once you configured the settings, **Publish** the same on Web site to make it available for users

# Project Management

Project Management is a collection of guiding processes to achieve a specified target. That may include initiation, planning, assignation, controlling, analysis and closing. Project management app is one of the powerful tools in Odoo. Where we can run any type of projects with user-defined workflow. To enable project management functionalities in Odoo, you first need to install Odoo Project App.

With Odoo project management module you can define your project, add tasks in it, assign tasks to employees, manage employee timesheet and track issues associated with the project effectively. The module also provides an option to enable portal view, through which your client can track the progress of the project. Just like in all other modules, the reports generated by BI engine gives an insight to all your projects.

Some of the features [19] of the Odoo project management module is

- **Clean and fast**

## ***Modern User Interface***

A fast user interface designed for modern project management. Get all the information you need where you need it.

## ***Mobile***

Mobile-friendly. Track projects and tasks easily on the move. Stay connected, always.

## ***Filters and Groups***

Search tasks or issues easily with the smart filters. Analyze data with multi-level grouping.

## ***Fully customizable***

Customize the process of every project, rename stages and alerts according to your own activities, automate emails, etc.

- **Tasks**

## ***Customized Kanban View***

Drag & drop tasks easily with the ‘Kanban’ view. Group tasks by stages, responsible, deadline, etc. Change name of “task/issues”. Change the meaning of the green/red status. Create specific stages per project. Define the process through custom tool-tips for each stage. Create tasks from sales orders.

## ***Calendar of Deadlines***

Use the calendar view on tasks to highlight project deadlines. Simply drag & drop tasks in the calendar to reschedule.

### ***Multi-projects***

Work on single or multiple projects at the same time. Perform multi-project analysis and searches.

### ***Document Management***

Manage documents related to tasks, issues or projects. (Specifications, plans, etc.)

### ***Gantt Chart***

Manage tasks on a timeline with the Gantt chart view. The easiest way to track deadlines and timeline progress.

### ***Graphs***

Get graph charts to analyze the progress of your tasks: by stage, by responsible, by tag, by project, etc.

### ***Pivot Table Analysis***

Use the pivot table on tasks to perform deep statistical analysis on the performance of your projects.

### ***Time Tracking***

Track expected hours, effective hours, and re-forecasts on tasks.

### ***Archive tasks***

Archive tasks done and have a clear view of the other tasks you still need to work on.

- **Issues**

### ***Customer tickets***

Use issues to track support contracts, tickets, bug reports.

### ***Email integration***

Communicate with your customers by email. Everything is automatically attached to the issue to get a full visibility.

### ***Service Level***

Link SLA-related information to issues: time to open a ticket, time to close a ticket, statistics on the volumes and performances, etc.

### ***Automate actions***

Use triggers and automated actions to send automatic emails on different statuses: confirmation of ticket, customer satisfaction survey, etc.

- **Customer Services**

### ***Timesheets***

Track time on projects and tasks using the timesheet app. Available as a Chrome plugin or a mobile app.

### ***Customer Satisfaction***

Use the customer satisfaction rating survey to get feedback from customers every time you close an issue. Configure the automatic email sent to customers after each

milestone and receive their feedback directly. Analyze overall rating by project to improve your process.

#### ***Forecasts***

Forecasts projects and resources easily from the Gantt chart taking employee holidays into account. Compare forecasts with real timesheets.

#### ***Portal front-end***

Customers have access to their tickets from the portal.

- **Multi-Purpose**

#### ***Internal Projects***

Track internal projects with tasks and manage teams efficiently by setting clear priorities.

#### ***After Sales Services***

Effortlessly manage after sales services requests and configure a customized process in the Kanban view.

#### ***Support Contracts***

Automatically create issues by email, track support services and count hours on contracts.

#### ***Customer projects***

Forecast project resources, track tasks and milestones, record timesheet and analyze the performance of the team. [19]

### **System Users:-**

There are two type of users in Project Management

- **Project Manager:** - Who can create and manage projects.
- **Project User:** - Who can access the tasks assigned to him

## **Basic Management**

### **Create Project**

Either you can use the **Create** button in Dashboard or

- **Project -> Configuration -> Projects -> Create**

Project Name

Tasks as Tasks

Allow timesheets

Active

Project Manager: Administrator

Privacy:  Visible by all employees

Customer:

**Task as** field will allow you to give a custom name for your project Tasks

- Set **Project Manager**, and other privacy settings for your projects.
- **Save** and mark **Active** to make the project Available

*"Now you can see the project is listed in your **dashboard**"*

**Note:** - You can Update/Delete any project from the same menu i.e. **Project > Configuration > Projects**

### Create Task

By creating a Project you have just created the template. Now it is the time to create tasks in your Project. You can create a Task by two methods.

#### Method 1:

- **Project > Dashboard**

Projects		Search... <input type="button" value=""/>			Filters <input type="button" value=""/> Group By <input type="button" value=""/> Favorites <input type="button" value=""/>		1-6 / 6 <input type="button" value=""/> <input type="button" value=""/>	
Data Import/Export Plugin <small>data-import-export-plugin@45.33.78....</small>	5 Databases	E-Learning Integration <small>e-learning-integration@45.33.78.184</small>	3 Trainings	Internal - GAP Analysis <small>internal-gap-analysis@45.33.78.184</small>	0 Tasks	More <input type="button" value=""/> <input type="button" value=""/>	Timesheets	More <input type="button" value=""/> <input type="button" value=""/>
Research & Development <small>research-development@45.33.78.184</small>	4 Tasks	Website for Sales & WMS <small>website-for-sales-wms@45.33.78.184</small>	6 Tasks	Website Design Templates <small>website-design-templates@45.33.78....</small>	2 Designs	More <input type="button" value=""/> <input type="button" value=""/>	Timesheets	More <input type="button" value=""/> <input type="button" value=""/>

- Click the project you wish to add Task.

The screenshot shows a project management application with a top navigation bar for 'Project Data Import/Export Plugin' and search functionality. Below the navigation is a toolbar with filters, group by, and favorites. The main area is divided into four columns representing project stages:

- To Do:** Contains three tasks: 'jbjb' (starred), 'Data import + Doc' (starred), and 'Unit Testing'.
- In Progress:** Contains two tasks: 'Customer analysis + Architecture' (starred) and 'Data Export flow'.
- Done:** Contains one task: 'Modifications asked by the customer' (starred).
- Cancelled:** Contains no visible tasks.

A vertical sidebar on the right features a 'Create' button and a link to 'ADD NEW COLUMN'.

Listed are the different Stages of a Project.

- You can add a Task at any stage by Just clicking on the '+' button
- To view Update/Delete option click on the task

*Or you can follow*

- **Project > Task > Create**

The screenshot shows a 'Tasks / New' page with a 'Save' and 'Discard' button at the top. The main form is titled 'Task Title...' and includes the following fields:

- Project:** E-Learning Integration
- Assigned to:** priya
- Initially Planned Hours:** 00:00
- Deadline:** (dropdown menu)
- Tags:** (dropdown menu)
- Working Time Recorded:** 0%

Below the form are tabs for 'Description', 'Timesheets', and 'Extra Info'. The 'Description' tab contains a rich text editor toolbar with various icons for bold, italic, underline, etc.

- Choose the Project
- Assign the Task to user
- Once you choose the project you can add Timesheet for this task
- Mark <Active> and <Save>

**Note:** - You can Update / Delete any task information from the same menu i.e. **Project > Task >**

## Define Project Stages

You can define different stages for your Project. To customize the stages

- Configuration -> Stages -> Create

The screenshot shows the 'Stages / New' creation interface. At the top, there are 'Save' and 'Discard' buttons. Below them, fields for 'Stage Name' (with a placeholder) and 'Email Template' (with a dropdown menu). A checkbox labeled 'Folded in Kanban' is checked. The main area is titled 'Stage Description and Tooltips'. It contains three rows for mapping colors to labels: a grey circle, a red circle, and a green circle, each associated with a text input field. Below this, a note says 'You can also give a tooltip about the use of the stars available in the kanban and form views.' followed by a star icon and a text input field. Another note says 'You can also add a description to help your coworkers understand the meaning and purpose of the stage.' followed by a text input field with placeholder 'Add a description...'. At the bottom right of the form is a large 'Save' button.

- Fill the fields and **Save**

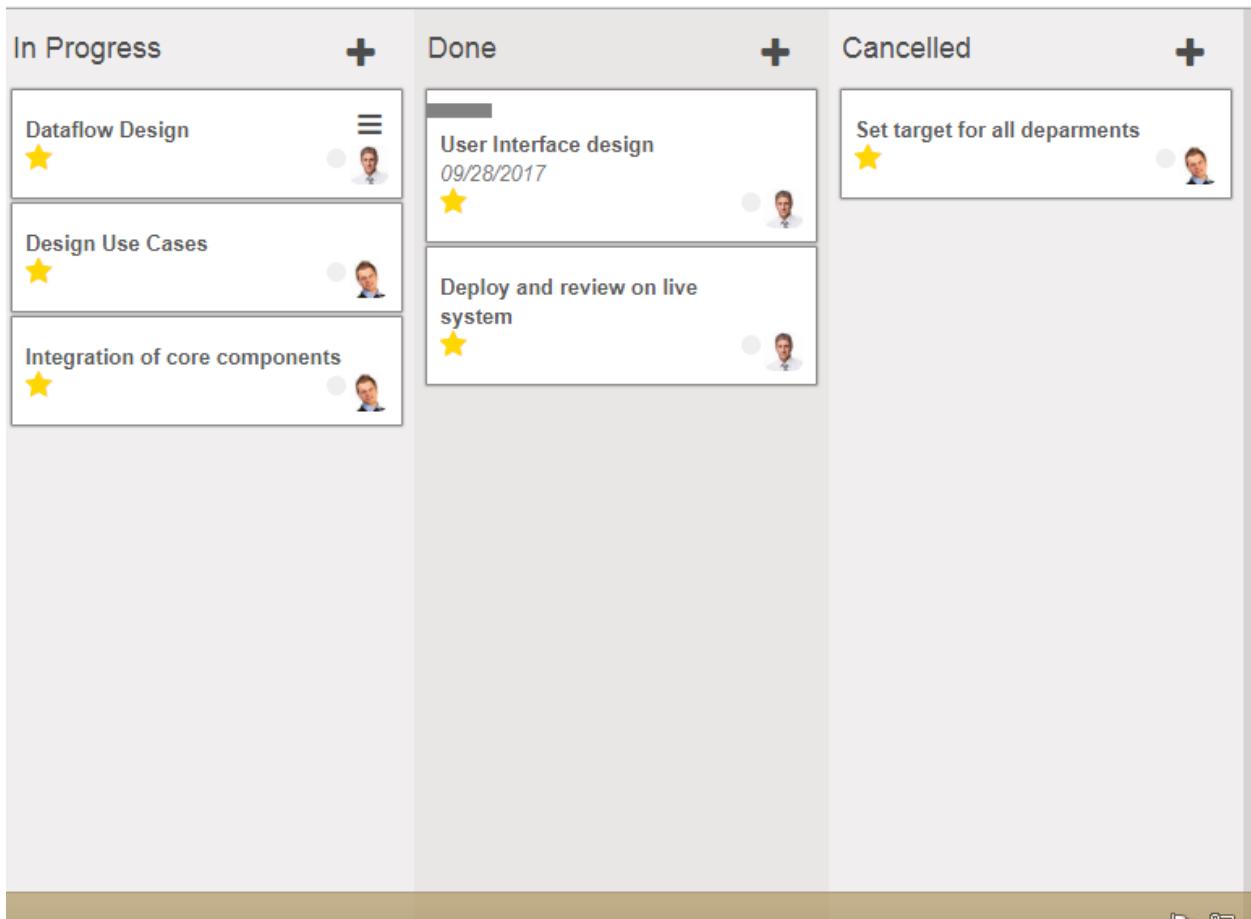
**Note:** - you can Update/Delete any stage from the same menu i.e. **Configuration > Stages**

## Timesheet management

Timesheet management is a very important aspect in Project management. After project manager creates a project and assigns its task to different user, all such users can access project Timesheet and add their contribution to it. The same operation can be done through Timesheet Management Module of Odoo. To enable this feature you must install Timesheet App from Odoo.

To add a timesheet

- Select the project from Dashboard



- Select the task you wish to add a Timesheet
- In Task details, under Timesheet menu click **Add an Item**

Description	Timesheets	Extra Info	
Date ▲	User	Description	Duration
09/06/2017	priya	help pr	01:00 <span style="font-size: small;">Delete</span>
Add an item			
<hr/>			
<hr/>			
<hr/>			

- After passing entry **Save** the Task

**Note:** - This entry will be automatically updated to employee's Personal timesheet, which he can view from **Timesheet -> My Timesheet**

**Note:** - "whenever a user Passes an entry in timesheet, the total time assigned to that task automatically reduces"

The screenshot shows a project timesheet entry for 'Lillis Emporium ERP' assigned to a 'Developer'. The entry was initially planned for 06:00 hours. The deadline is 07/03/2017, and it has the tag 'NeedAssistance'. A progress bar indicates 54% completion. The 'Timesheets' tab is selected, showing three entries: 'Designing of Task' by 'Administrator' (00:45), 'Button action & Controllers' by 'Developer' (02:15), and 'Testing' by 'Developer' (00:15). The total hours spent are 03:15, and remaining hours are 02:45.

Date	User	Description	Duration
09/14/2017	Administrator	Designing of Task	00:45
09/14/2017	Developer	Button action & Controllers	02:15
09/14/2017	Developer	Testing	00:15

Hours Spent : 03:15  
Remaining Hours : 02:45

## Issue Tracking

In project management, Issues and its tracking is a very important thing. We can enable this feature in Odoo by installing "Issue Tracking" from apps.

This *Issue Tracking* module manages issues we might face in a project like bugs and errors in a system, client complaints or material breakdowns etc. So it allows the project manager to deploy any person to work over the reported issues. **Issues should have some workflow. It will take the project's workflow automatically if we mention any project in issue form.** We can go through its fields

## Create an Issue

- Project >Search > Issue > Create

The screenshot shows a 'New' issue creation page. At the top left is the 'Issues / New' breadcrumb. Below it are 'Save' and 'Discard' buttons. The main area is titled 'Issue Summary...'. It contains several input fields: 'Assigned to' (dropdown), 'Priority' (dropdown with two stars), 'Tags' (dropdown), 'Contact' (dropdown), 'Email' (text input), and 'Project' (dropdown). Below these are tabs for 'Description' (selected) and 'Extra Info'. A large text area labeled 'Add an internal note...' is present.

- You can assign the issue to an employee to solve
- You may also set priority
- Fill the fields and **Save**

**Note:** - You can track and Update an issue progress from same menu i.e. **Project ->Search -> Issue**

The screenshot shows a 'My Issues' dashboard with a search bar and filter options. The interface includes a 'Create' button and a toolbar with various icons. The board is divided into four columns: 'To Do', 'In Progress', 'Done', and 'Cancelled'. Each column has a '+' icon to add new issues. The 'To Do' column contains four issues: 'Problem loading page Delta PC' (priority 2 stars), 'Page not Found Agrolait' (priority 2 stars), 'Programming Error China Export' (priority 2 stars), and 'Create new object ASUSTeK' (priority 2 stars). The 'In Progress' column contains three issues: 'Constraint Error ASUSTeK' (priority 2 stars), 'Patches Error in Program Agrolait' (priority 2 stars), and 'Program not giving proper output ASUSTeK' (priority 2 stars). The 'Done' column contains two issues: 'Improve Reports in HRMS China Export' (priority 2 stars) and 'Logical Error in Program ASUSTeK' (priority 2 stars). The 'Cancelled' column is currently empty.

# Report

Different Kind of Reports related to a Project as well as Issues are available under **Reports** tab.

Issues Analysis	
Measures	
	- Total
	+ September 2017
	# of Issues
- Total	17
+ Data Import/Export Plugin	1
+ E-Learning Integration	2
+ Internal - GAP Analysis	1
+ Research & Development	4
+ Website for Sales & WMS	1
+ Website Design Templates	8

## Project Customer Portal:

The Customer can analyze his project related tasks, timesheets, issues and their status through customer portal in your website. For this, we have to set the project privacy as “**Visible by following customers**” in project settings. We have to install “Website Project” and “Timesheet in Website Portal” apps from Odoo to access this features. By giving your customer the portal access, he can view the progress of his project as well as can interact with your organization.

### Portal Access Management:

To give a customer Portal access either you can create a user with Portal access by the Following procedure.

- Configuration > Project > Select the Project

**Data Import/Export Plugin**

Tasks as Databases  
Issues as Issues  
Allow timesheets

Documents	Databases	Issues
Timesheets	Active	

Project Manager: Administrator  
Privacy: Visible by following customers  
Customer: Delta PC

- Click on the customer

## Actions > Portal Access Management

Portal Access Management

Portal Other Extra Rights / Portal

Select which contacts should belong to the portal in the list below. The email address of each selected contact must be valid and unique. If necessary, you can fix any contact's email address directly in the list.

Contact	Email	In Portal
Delta PC, Charlie Bernard	charlie.bernard@wealthyandsons.example.com	<input type="checkbox"/>
Delta PC, Jessica Dupont	jessica.dupont@wealthyandsons.example.com	<input type="checkbox"/>
Delta PC, Kevin Clarke	kevin.clarke@globalsolutions.example.com	<input type="checkbox"/>
Delta PC, Morgan Rose	morgan.rose@globalsolutions.example.com	<input type="checkbox"/>
Delta PC, Richard Ellis	richard.ellis@deltapc.example.com	<input type="checkbox"/>
Delta PC, Robert Anderson	robert.anderson@chamberworks.example.com	<input type="checkbox"/>
Delta PC, Robin Smith	robin.smith@globalsolutions.example.com	<input type="checkbox"/>

This text is included in the email sent to new portal users.

Apply Cancel

- Click on the **email** of the user (to whom we want to give access)
- Tick Portal access

An invitation mail will send automatically to the customer with Username and Password to his portal. He can login to your site and see the entire project in the website.

The screenshot shows the Odoo portal interface. At the top, there is a navigation bar with links for Home, Contact us, and a dropdown for John Doe. Below the navigation bar is a search bar containing the text "My Account Projects Tasks Issues". The main content area is divided into three sections: "Your Projects" (1), "Your Tasks" (3), and "Your Issues" (1). To the right, there is a "Your Details" section showing the user's name "John Doe" and email "johndoe@example.com" with a "Change" button.

- Customer can message to project management team through his portal, and such messages will be Appended Project details

The screenshot shows a detailed view of a project task. The task has an "Initially Planned Hours" of 06:00 and a "Working Time Recorded" progress bar at 54%. The task description includes items like "Android Layouts", "Connection Strings", and "DB Backup Collection". Below the task details, there is a message from "John Doe" sent 7 hours ago asking if updated code has been committed. There are buttons for "New message", "Log an internal note", "Following", and a notification count of 2.

Initially Planned Hours	06:00	Working Time Recorded	54%
Description	Timesheets	Extra Info	
<ul style="list-style-type: none"><li>• Android Layouts</li><li>• Connection Strings</li><li>• DB Backup Collection</li></ul>			

New message Log an internal note

✓ Following 2

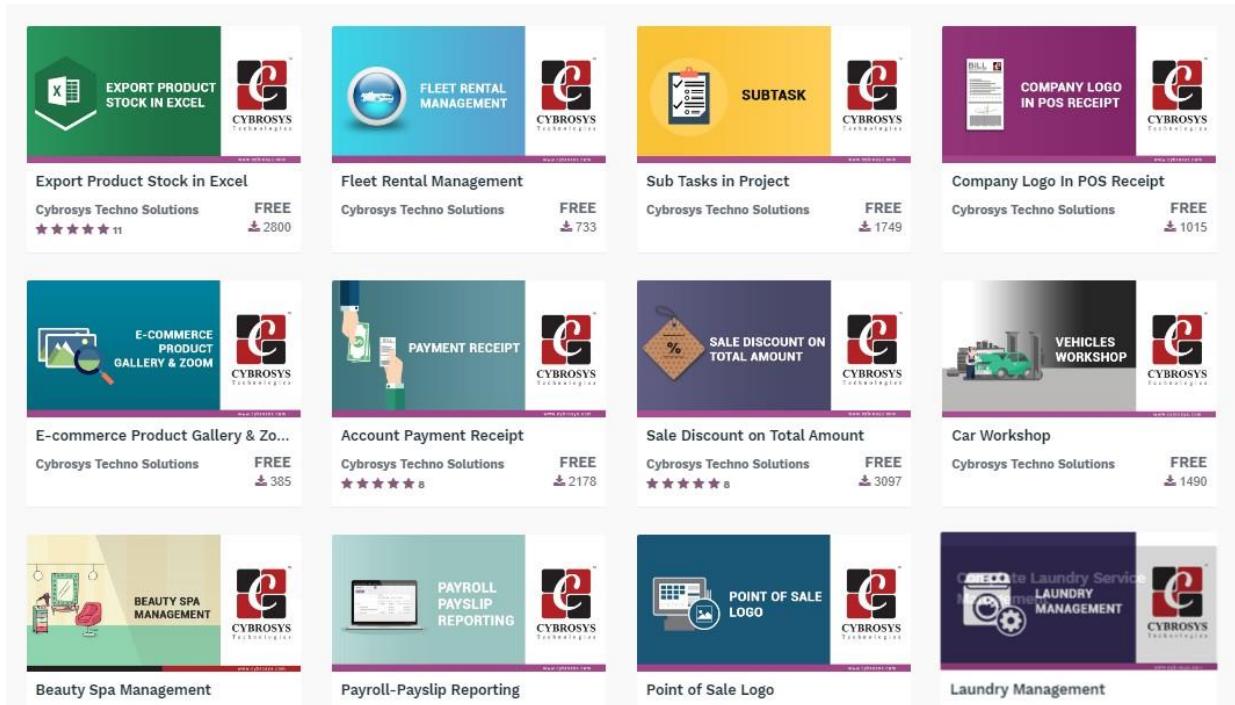
Today

John Doe - 7 hours ago  
Did you commit updated code?

## Know some of our Apps and Plugin

Cybrosys has made an immense contribution to Odoo development community by providing online community assistance through forums and community portals. But our greatest contribution is the 150+ free applications and Plugins we made available in the Odoo App store. We have made custom applications for almost all the modules. You can access these useful plugins from Odoo app store for free.

A snapshot of Cybrosys Apps



# Odoo Apps by Cybrosys

A few of the Odoo Apps from Cybrosys. View more from Odoo App store

## Product Stock Excel Report



The screenshot shows the product page for the 'Export Product Stock in Excel' app. On the left, there's a green banner with a white 'XLS' icon and the text 'EXPORT PRODUCT STOCK IN EXCEL'. To the right is the Cybrosys Technologies logo. The main title is 'Export Product Stock in Excel' by Cybrosys Techno Solutions, with a 5-star rating of 11. Below it are download links for 'v 10.0' (Third Party) and 'DOWNLOAD FOR 10.0 SERIES'. Technical details include: Technical name - export\_stockinfo\_xls, License - AGPL-3, Repository - git@github.com:CybroOdoo/CybroAddons.git, Also available for v 9.0, v 8.0, Included Dependencies - Base report.xlsx.

This Plugin helps you to export current stock report of all products to XL datasheet.

## Sub Task



The screenshot shows the product page for the 'Sub Tasks in Project' app. On the left, there's a yellow banner with a clipboard icon and the word 'SUBTASK'. To the right is the Cybrosys Technologies logo. The main title is 'Sub Tasks in Project' by Cybrosys Techno Solutions, with a 5-star rating of 1750. Below it are download links for 'v 10.0' (Third Party) and 'DOWNLOAD FOR 10.0 SERIES'. Technical details include: Technical name - project\_subtask, License - LGPL-3, Repository - git@github.com:CybroOdoo/CybroAddons.git, Also available for v 9.0.

Normally in Odoo Project Management module you can add Tasks under a particular project but no sub tasks. This plugin enable following features.

- Sub-Task Lists under Task.
- Sub-Task Count in Task Kanban View.
- Sub-Task Stages in Configuration.
- Sub-Task Analysis under Report.
- Deadline Validation for Sub-Task.
- Stage Validation for Sub-Task

## Discount in Sales



The screenshot shows the Odoo app store page for the 'Sale Discount on Total Amount' module. It features a large image of a price tag with a percentage symbol, the Cybrosys Technologies logo, and a green 'DOWNLOAD FOR 10.0 SERIES' button. To the right, detailed information is provided:

- Sale Discount on Total Amount** by Cybrosys Techno Solutions
- Rating: ★★★★☆ 8
- Version: v10.0 | Third Party | 3100
- Download button: DOWNLOAD FOR 10.0 SERIES
- Technical name: sale\_discount\_total
- License: GPL-3
- Repository: git@github.com:CybroOdoo/CybroAddons.git...
- Also available for: v9.0, v8.0

This module allows you to mention discount on Total of sale order and Total of Customer Invoice in two ways

1. As percentage
2. As Amount

## Vehicle Workshop



The screenshot shows the Odoo app store page for the 'Car Workshop' module. It features an image of a car being worked on, the Cybrosys Technologies logo, and a green 'DOWNLOAD FOR 10.0 SERIES' button. To the right, detailed information is provided:

- Car Workshop** by Cybrosys Techno Solutions
- Rating: ★★★★☆ 1492
- Version: v10.0 | Third Party | 1492
- Download button: DOWNLOAD FOR 10.0 SERIES
- Technical name: fleet\_car\_workshop
- License: GPL-3
- Repository: git@github.com:CybroOdoo/CybroAddons.git...
- Also available for: v9.0, v8.0

Car Workshop Management is an efficient app from Cybrosys to manage automobile workshop with great ease. Keep track of everything, like vehicle owner details, Works assigned, Bill details, etc. with this plugin

Some other features are as below:

- User Friendly Interface.
- Effective Time management.
- Separate Journal Configuration..
- Integrated with Accounting.
- High Scalability.

## Fleet Rental Management



The screenshot shows the Odoo app interface for Fleet Rental Management. On the left, there's a large blue header with a car icon and the text "FLEET RENTAL MANAGEMENT". To the right is the Cybrosys Technologies logo. The main content area displays various management screens related to fleet rental.

**Fleet Rental Management**  
by Cybrosys Techno Solutions

v 10.0 | Third Party | 737

[DOWNLOAD FOR 10.0 SERIES](#)

Technical name	fleet_rental
License	LGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.gi...
Also available for	v 9.0

This App facilitate vehicle rental management features in Odoo.

### Features

- Multiple Plans for Rental Contract (Days/Weeks/Months/Years).
- Integrated with Accounting Module.
- Automatically Create Recurring Invoices.
- Sending email for confirmation, first payment and recurring invoices.
- Check List Facility.
- Separate Tree view for Checklist.
- Damage Checking Facility.
- Billing Facility for Damages/Check Lists.
- Contract Payment Validations.
- Detailed Fleet Rental Analysis Report.
- Access Rights from Multiple Level.

## Account Payment Receipt



The screenshot shows the Odoo app interface for Account Payment Receipt. It features a blue header with a hand holding money and a bill icon, and the text "PAYMENT RECEIPT". To the right is the Cybrosys Technologies logo. The main content area displays various screens related to payment receipts.

**Account Payment Receipt**  
by Cybrosys Techno Solutions  
★ ★ ★ ★ 8

v 10.0 | Third Party | 2180

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Technical name	payment_receipt_invoice
License	AGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.gi...
Also available for	v 9.0

With this plugin you can generate and print Receipts for your customers and vendors.

## Beauty Spa Management



The screenshot shows the user interface of the Beauty Spa Management application. On the left, there's a decorative image of a salon interior with a pink chair and a desk. The right side has a sidebar with the title "BEAUTY SPA MANAGEMENT" and the Cybrosys Technologies logo. Below the sidebar, there's a "www.cybrosys.com" link.

**Beauty Spa Management**  
by Cybrosys Techno Solutions

v 10.0 Third Party 1313  
[DOWNLOAD FOR 10.0 SERIES](#)

Technical name	salon_management
License	LGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.gi...
Also available for	v 9.0

- Main features
- Online Booking Facility
- Accounting Facility
- Customer Notification through Mail
- User Interactive Dashboard
- Customer can view the Available chairs and order details
- Different access levels for Users and Administrator
- Track the chair user by date

## Life Line for Task



The screenshot shows the user interface of the Life Line for Task application. On the left, there's a decorative image of a progress bar with four colored segments: green (91%), yellow (72%), orange (49%), and red (19%). The right side has a sidebar with the title "LIFE LINE FOR TASK" and the Cybrosys Technologies logo. Below the sidebar, there's a "www.cybrosys.com" link.

**Lifeline for Task**  
by Cybrosys Techno Solutions  
★ ★ ★ ★ ★ 7

v 10.0 Third Party 1538  
[DOWNLOAD FOR 10.0 SERIES](#)

Technical name	project_lifeline
License	LGPL-3
Repository	git@github.com:CybroOdoo/CybroAddons.gi...
Also available for	v 9.0

You can create Life Line Bar for the task with this Plugin.

- User Defined Progress Bar Color Configuration.
- Task Lifeline Bar based on Deadline.
- Automatic Color Change of Lifeline Bar.
- Default Color for Forbidden.

## Reminders



The screenshot shows the Odoo App Store page for the "Reminders" module. The module icon features a magnifying glass over a calendar. The title "REMINDERS" is displayed in large white letters. To the right, the Cybrosys Technologies logo is shown, consisting of a stylized red and black "C" icon followed by the company name. The app details on the right include:

- Reminders** by Cybrosys Techno Solutions
- ★ ★ ★ ★ 3
- v 9.0, Third Party, 665
- [DOWNLOAD FOR 9.0 SERIES](#)
- Technical name: general\_reminders
- License: LGPL-3
- Repository: git@github.com:CybroOdoo/CybroAddons.git...

Reminders helps you to attach important dates and Tasks to any of your module.

## Automatic Developer Mode



The screenshot shows the Odoo App Store page for the "Automatic Developer Mode" module. The module icon features a person working at a laptop. The title "AUTOMATIC DEVELOPER MODE" is displayed in large white letters. To the right, the Cybrosys Technologies logo is shown. The app details on the right include:

- Automatic Developer Mode** by Cybrosys Techno Solutions
- ★ ★ ★ ★ 7
- v 10.0, Third Party, 1781
- [DOWNLOAD FOR 10.0 SERIES](#)
- Technical name: developer\_mode
- License: AGPL-3
- Repository: git@github.com:CybroOdoo/CybroAddons.git...
- Also available for: v 9.0, v 8.0

This module makes you free from activating developer mode operations repeatedly. When you login, it will trigger the DEVELOPER MODE automatically.

- Automatically Trigger Developer Mode.
- Showing Running DB on Left Top.
- Update modules easily

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