

Odoo Customization Checklist for Jewelry Manufacturing Workflow

1. Environment Setup

- Install Odoo 17 Community or Enterprise edition (recommended: latest stable release).
- Create a fresh test database and install required modules: Manufacturing, Inventory, Sales, CRM, and Quality.
- Enable Developer Mode from Settings → Activate Developer Mode.
- Set up your development environment (Python, VS Code/PyCharm, PostgreSQL, Git).
- Use terminal command to scaffold a custom module:
odoo-bin scaffold jewelry_management addons

2. Process Mapping

- Document your jewelry manufacturing flow: Design → Sampling → Order → Manufacturing → QC → Export.
- Identify which parts are already covered in Odoo and where you need customization (e.g., pricing, sampling, metal tracking).
- Create a workflow diagram or use Odoo Studio to visualize the states and transitions.

3. Custom Module Development

- Create new models in your custom module: jewelry.design, jewelry.sampling, and jewelry.production.order.
- Add fields for metal type, karat, weight, diamond details, pricing, and approval status.
- Design form and tree views in XML for easy data entry and tracking.
- Link jewelry.design to sale.order and manufacturing orders (M2O fields).
- Add state transitions for design approval, sampling, and QC sign-off.

4. Add Business Logic & Automation

- Implement dynamic pricing formula ($\text{Gold Rate} \times \text{Weight} \times \text{Purity} + \text{Diamond Value} + \text{Making Charges}$).
- Create automated workflows for approval, sampling creation, and MO generation.
- Integrate with gold rate API or add an admin panel to manually update rates.
- Add automated email/WhatsApp notifications for approvals using Odoo Discuss or external API.

5. Testing & Validation

- Create sample customer designs and go through full workflow to confirm accuracy.
- Validate inventory consumption (metal & diamond weights) during manufacturing.
- Test QC checklists, routing steps, and approvals.
- Review pricing accuracy and workflow automation with users (merchandiser, designer, QC head).

6. Deployment & Training

- Move your tested module to the production Odoo instance.
- Backup your database before deploying new modules.
- Train users by role (Merchandiser, Designer, PPC, QC, CRM).
- Enable access controls and permissions for each role.
- Schedule regular backups and enable Odoo logs for monitoring.

7. Post-Go-Live & Improvements

- Monitor workflow performance using Odoo dashboards and reports.
- Gather feedback from users for additional improvements.
- Optimize manufacturing routes, lead times, and QC templates.
- Add advanced reports (metal usage variance, delivery performance, sampling analytics).