

Software Requirements Specification

for

Odoo 10.0

Version 1.0 approved

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Revision History

Name	Date	Reason for Changes	Version
Entire Team	November 2016	Initial Release	1.0

1.0 Introduction

1.1 Purpose

The purpose of this Software Requirements Specification is to provide a detailed description of the functional and nonfunctional requirements for Odoo 10.0, a software suite of enterprise management applications. This document will describe two applications that are included in this version of Odoo at launch: Customer Relationship Management (CRM) and Sales.

This document reflects the intentions of Odoo's business plan, and provides a basis for designing and prototyping the system.

This document is intended to be used as a reference by the members of the project team that will design, develop, implement, and verify the functionality of Odoo. This document will also be referenced during implementation and testing of the final applications.

1.2 Scope

Odoo is an open-source, web-based suite of business applications intended to help businesses efficiently manage their operations and grow. The two applications releasing at launch are CRM and Sales. These two applications will allow key decision makers in businesses to effectively engage their customers, track customer communication, and manage quotes, sales, and invoices.

As businesses grow and begin to engage more customers, it becomes increasingly important to track these customers and any relevant correspondences, which Odoo's CRM provides an organized solution for. The tools that are included in the CRM make it easy for users to use data to track leads and generate accurate forecasts. By automating certain tasks and providing a real-time overview, users will always be able to effectively and efficiently track and engage customers.

Once customers are engaged, the Sales application provides users with an easy means to automatically generate and send clean and professional sales quotes. The Sales application closes the loop of customer interaction and works hand-in-hand with the CRM application. As a user brings a customer to a point of sale, the Sales application can quickly generate a sales quote to be sent to the customer. If the customer accepts and signs off on the quote, Odoo will convert the accepted quote directly into a sales order and invoice the customer.

By working together, Odoo presents a complete solution to engage a customer from the initial point of contact to the finish, where the customer becomes a paying customer.

1.3 Document Conventions

No special typographical conventions are used in this Software Requirements Specification document. The document may contain certain terminology which users may be unfamiliar with. Appendix A contains a glossary that will list specific technical terminology.

For the purposes of this document, Customer Relationship Management shall be abbreviated as CRM.

Additionally, this document is written to be as reader friendly as possible. The document will be organized and formatted in a way that prioritizes readability while maintaining and adhering to the IEEE standard to its best ability. IEEE Std 830-1998 will be used as a base for this document.

1.4 References

- [1] K. Wiegers and J. Beatty, Software Requirements, 3rd ed. Redmond, Washington: Microsoft Press, 2013, p. 68.
- [2] "830-1998 - IEEE Recommended Practice for Software Requirements Specifications", IEEE Computer Society.
- [3] "Open Source ERP and CRM | Odoo", Odoo. [Online]. Available: <https://www.odoo.com/>.

1.5 Overview

The remaining sections of the document provide an overview of Odoo and contain the functional and nonfunctional requirements to be included.

Readers who are unfamiliar with or prefer a summary of Odoo should focus on Sections 1 and 2, Introduction and Overall Description respectively. These sections provide a brief, high-level overview of Odoo. Without getting into specifics, Section 2 provides a general view of product functions, user classes, and operating environment.

Section 3 contains detailed specifics on product functions derived from functional requirements. This section will be more technical. Readers who want to read about Odoo in greater technical detail should pay close attention to Section 3. Section 4 provides the user with an overview of external interface requirements such as user interfaces and hardware interfaces. Readers who are interested in the non-technical aspects of Odoo, such as performance, safety, and security, should read Section 5, which documents the non-functional requirements.

A glossary is provided in Appendix A in the event that any unfamiliar terminology is used.

2.0 Overall Description

2.1 Product Perspective

Odoo is a self-contained, open-source application suite intended to be used by users of a business. The CRM and Sales applications are the two applications to be delivered at Odoo launch. These products specifically target Odoo's customer base. Odoo is designed to help rising businesses effectively manage their growth. Its goal is to help customers as they grow from a \$50,000 per year company to a \$100,000 per year company.

CRM and Sales are the core applications of Odoo and will be the two applications featured at launch. This aligns with Odoo's business goal of helping companies grow. When a company utilizes a CRM, their customers are tracked and company representatives are able to easily reach out to their customers. By including the Sales application, business representatives can fully close the loop and effectively guide someone from being a lead to a paying customer. Following this process will help companies grow not only their customer base, but their revenue figures as well.

Odoo is expected to evolve and grow over time. In order for Odoo to be a competitive and versatile enterprise resource planning system, it is likely that it will evolve and add on additional applications and functionality beyond the current scope of CRM and Sales.

2.2 Product Functions

The following list contains a brief outline and description of the features in Odoo. The features are split into three categories: Core features, CRM features, and Sales features. Core features are the basic foundations of the website that CRM and Sales build upon.

Core Features

1. Log in
 - a. Appears during new sessions
 - b. Authenticates user credentials
 - c. Grants and denies access to Odoo
2. Dashboard
 - a. Allow users to view and open the pipelines of sales teams
 - b. Provides general performance metrics
 - c. Displays user-created to-do list
3. Settings
 - a. Provides users the ability to make settings changes to Odoo
 - b. Allows users to add, modify, delete activities
 - c. Allows users to add, modify, delete sales teams

CRM Features

1. Pipelines
 - a. Allows users to create, modify, delete opportunities
 - b. Users can drag and drop opportunities to update status

- c. Displays overview of all opportunities for the pipeline
- 2. Customer Management
 - a. Users can create, modify, delete customers
 - b. Supports searching through the customer list, as well as grouping and filters
 - c. Allows users to send messages to customers
- 3. Next Activities
 - a. Provide the ability to import a CSV or Excel file of next activities
 - b. Create new detailed opportunities
 - c. Users can see a list of their opportunities and the next activities to take
- 4. Reporting
 - a. Creates reports and charts of pipeline opportunities and activities
 - b. Users can customize reports by adding and removing certain measures
 - c. Supports exporting a report to an Excel file

Sales Features

- 1. Quotations
 - a. Allows users to create, modify, delete sales quotes
 - b. Allows users to select a customer and send the quote to the customer
 - c. Supports importing and exporting sales quotes
- 2. Sales Orders
 - a. Automatically turn confirmed quotes into sales orders
 - b. Supports importing and exporting sales orders
 - c. Tracks and displays the history of the initial quote
- 3. Products
 - a. Allows users to create, modify, delete saleable and purchasable products
 - b. Records individual product sales history
 - c. Supports search, filters, grouping functionality
- 4. Sales to Invoice
 - a. Displays all pending sales orders for users to create invoices
 - b. Creates invoices of different types, selectable by user
 - c. Automatically removes sales order from view once it is turned into an invoice
- 5. Orders to Upsell
 - a. Displays overview orders that can be upsold
 - b. Follows invoicing policy to determine which orders are appropriate to display
 - c. Allows user to create new quotations
- 6. Reporting
 - a. Creates reports and charts of sales
 - b. Users can customize reports by adding and removing certain measures
 - c. Supports exporting a report to an Excel file

2.3 User Classes and Characteristics

There are different classes of users that will interact with Odoo. The user classes selected represent potential classes of business users that may use Odoo. The class names and a brief description are

included. A company that uses Odoo will not have their customers use the system. Only company users are expected to access Odoo.

Customer Sales Representatives	Customer Sales Representatives are the first point of contact for customers. Individuals in this user class talk with potential customers as well as existing customers. These users will use the CRM features daily and will typically be creating and updating customers in the CRM after each call, email, or interaction with a customer.
Account Executive	Account Executives manage larger accounts and serve as an account's first point of contact. These users are similar to Customer Sales Representatives in that they are expected to use the CRM features daily. Since Account Executives typically take care of all issues and communications of their customers, these users will also need access to the Sales features as well. If a customer needs to purchase an item, the Account Executive will generate and send the quote.
Inventory Staff	Inventory Staff tracks and handles the products that a company may offer its customers. They will create and edit products, as well as track inventory and potentially audit the inventory records. Inventory Staff does not need access to the CRM, but will have access to the Sales application. They are expected to access the Sales application as needed.
Accounting Team Associates	Accounting Team Associates manage transactions and reviews the status of payments and invoices. The Accounting Team Associates will primarily utilize reports and the Sales application. In the event that deeper auditing or tracking is necessary, the Accounting Team Associates will also have access to the CRM.
Sales Managers	Sales Managers manage the Customer Sales Representatives. They interact with customers less and primarily manage their team of representatives. Sales Managers have access to the CRM as well as the Sales application. They will primarily utilize reports and manage activities.
Account Executive Managers	Account Executive Managers manage the Account Executives. Similar to Sales Managers, they interact with customers less and mainly manage their team. Account Executive Managers will have access to the CRM as well as Sales application, but will primarily utilize reports and manage activities.
Website Managers	Website Managers maintain the settings and configuration of the Odoo instance for the company. This entails responsibilities such as user management, logo management,

and certain units of measurement. Website Managers will also engage with Sales Managers and Account Executive Managers to create and update activities and sales teams for the company.

2.4 Operating Environment

Odoo supports two different operating environments. The first operating environment assumes Odoo is being used in the cloud where a business has chosen to have Odoo host the application directly. The second operating environment assumes that the business has chosen to host their own instance of Odoo.

OE-1 through OE-3 will cover the first operating environment. The second operating environment will include OE-1 through OE-3, and will include OE-4 through OE-8 as well.

- OE-1: Odoo shall operate correctly with the following web browsers: Internet Explorer 10, 11; Mozilla Firefox 48 and later; Google Chrome 50 and later; and Apple Safari 9 and later.
- OE-2: Odoo shall operate on machines with the following minimum specifications:
 - Intel Core 2 Duo processor or better
 - 2 GB RAM
 - 40 GB hard drive
 - Broadband internet connection
 - Operating system: Windows 7 or later; OS X Mountain Lion or later; Linux distros with a graphical user interface and a compatible web browser.
- OE-3: Odoo shall operate with a stable internet connection of 5 MBPS or greater.
- OE-4: Odoo shall operate correctly with mobile browsers on Android and iOS.
- OE-5: Odoo shall be hosted on a machine (preferably a server) running Windows, deb-based distros (Debian, Ubuntu), or RPM-based distros (Fedora, CentOS, RHEL).
- OE-6: Odoo shall be hosted on a server running Python 2.7.
- OE-7: Odoo shall be hosted on a server running PostgreSQL 9.3 or later.
- OE-8: Odoo shall be hosted on a server with sufficient networking requirements for access.

2.5 Design and Implementation Constraints

The primary limitations and constraints is having a locally installed instance of Odoo. Since Odoo is designed to be feature rich and allows users to perform a multitude of different management actions, working with multiple application instances along with multiple users can consume many computing resources. When running multiple instances on legacy hardware, the quality, user experience, and service of Odoo may be negatively impacted.

Other limitations such as internet bandwidth and errors in handling installation scripts are also worth considering. Odoo is meant to be fast and responsive, even with many users and transactions. There

may be an initial upfront investment of time to self-host Odoo, but there are many possibilities to assist with company growth. It also carries a degree of separation between each Odoo application.

2.6 User Documentation

Odoo is designed to be feature rich, allowing users to perform a multitude of different actions. In order to help users navigate through all of the features and to utilize them efficiently, we have online documentation for users to read. Our documentation is user-friendly, featuring step-by-step instructions, FAQs, screenshots, and videos.

Each Odoo application (CRM and Sales at launch) will have its own online documentation section. Each respective application's online documentation section will contain an "Overview" section, containing basic information introducing a user to the main concepts of the application. The application's features will be broken down into help topics on accomplishing certain tasks for the features.

Additionally, we will maintain online documentation on how to install a self-hosted instance of Odoo. The self-hosted documentation will include sections on packaged installers as well as source installs. The self-hosted documentation will include instructions for both the Community version and the Enterprise version.

Odoo will also provide online documentation for developers as well, due to the open source nature of Odoo. White papers for the applications will be available as well.

2.7 Assumption and Dependencies

Time Dependencies

As mentioned previously, the features of Odoo are divided into three groups: core features, CRM features, and Sales features. Core features are crucial to the basic functionality of the Odoo application. It is essential for these features to be implemented in order for the application to be useful.

CRM and Sales features, however, are not critical to the basic function of the application. The CRM features are necessary for CRM related functionality. Similarly, the Sales features are necessary for sSales related functionality. However, it is not required to have the Sales features implemented for CRM to function properly. Thus, it is recommended to complete the core features first. The decision on whether the CRM or Sales features should be implemented after core features will be made during the later stages of the design phase.

External Dependencies

Some of the features presented in this document rely on the existence and maintained operation of APIs. A non-exhaustive list follows.

Payments

The Sales application in Odoo requires a SIM & SMS based Mobile Money Service such as Safaricom M-PESA, Airtel Money, or MTN Mobile Money to integrate payment services.

Inventory

Odoo leverages an inventory API in order to keep accurate inventory figures in the PostgreSQL database.

3.0 System Features

Section 3 contains the system features introduced earlier in Section 2.2. This section consists of:

- 3.0: Core Functional Requirements
- 3.1: Core Features
- 3.2: CRM Features
- 3.3: Sales Features

Several functional requirements have been identified as core functional requirements. That means these functional requirements are applicable globally within Odoo.

- FR-A: Odoo shall have search functionality and allow for filters and groupings to be used.
- FR-B: Searches should be saveable as user favorites.
- FR-C: Odoo shall have a Kanban view.
- FR-D: Odoo shall have a List view.
- FR-E: Odoo shall have a Graph view.
- FR-F: Odoo shall have a Pivot view.
- FR-G: Odoo shall have a Calendar view. The calendar view provides the user with a basic calendar.
- FR-H: Odoo shall display an error message when a required field is missing.

3.1.1 Core: Log in

3.1.1.1 Description and Priority

A login page will appear during new sessions in order to authenticate users and grant access to Odoo.

Priority: low

3.1.1.2 Stimulus/Response

Stimulus: User types in credentials and clicks “Log in” button.

Response: Odoo authenticates the user and redirects the user to Application Launcher.

Stimulus: User enters web URL for Odoo.

Response: Odoo displays login page.

3.1.1.3 Functional Requirements

- FR-1: A login page shall be displayed during new sessions. If user is already authenticated, Odoo shall not show the login page and instead redirect the user directly to Application Launcher.
- FR-2: Odoo shall successfully authenticate a user if they enter correct credentials.
- FR-3: Odoo shall display an error message if user enters incorrect credentials.

3.1.2 Core: Dashboard

3.1.2.1 Description and Priority

The Dashboard will be displayed upon successful user authentication. It will show the user's to-do list, performance metrics, and the company's defined sales teams.

Priority: medium

3.1.2.2 Stimulus/Response

Stimulus: User clicks "Meetings" for Today or Next 7 Days in "To do" section.

Response: Odoo displays weekly view of a meeting calendar.

Stimulus: User clicks "Next Actions" for Today in "To do" section.

Response: Odoo displays "Next Activities" with a "Today Activities" filter.

Stimulus: User clicks "Next Actions" for Next 7 Days in "To do" section.

Response: Odoo displays "Next Activities" with a "This Week Activities" filter.

Stimulus: User clicks "My Pipeline".

Response: Odoo displays user's "Opportunities Pipeline".

Stimulus: User clicks This Month's and Last Month's "Activities Done" in the "Performance" section.

Response: Odoo displays "Activities Analysis" report.

Stimulus: User clicks This Month's and Last Month's "Won in Opportunities" in the "Performance" section.

Response: Odoo displays "Pipeline Analysis" report.

Stimulus: User clicks This Month's and Last Month's "Invoiced" in the "Performance" section.

Response: Odoo displays "Invoices Analysis" report.

Stimulus: User clicks "Activities Done", "Won in Opportunities", or "Invoiced" Target.

Response: Odoo allows user to enter a number for the selected Target.

Stimulus: User requests to see pipeline for a company sales team.

Response: Odoo displays Opportunities Pipeline for requested sales team.

3.1.2.3 Functional Requirements

- FR-4: Performance metric boxes shall turn green if the target is met.
- FR-5: User shall be able to view and update their performance metrics on the dashboard.
- FR-6: User shall be able to view their to-do list.
- FR-7: User shall be able to view the company's sales teams and available actions.
- FR-8: Odoo shall display invoicing target for each sales team if a target has been defined. A progress bar is displayed and is filled as the target is met. Click to define a target if there is no target defined.
- FR-9: User shall be able to view, create, and run reports on opportunities, sales, and quotations.
- FR-10: User shall also be able to view each sales team's pipeline.

3.1.3 Core: Settings

3.1.3.1 Description and Priority

The Settings page can be accessed through the "Configuration" menu item and allows users to modify different system-wide settings. For example, users can set different operational permissions as well as certain defaults and contact information.

Priority: medium

3.1.3.2 Stimulus/Response

Stimulus: User clicks "Apply" button.

Response: Odoo saves the settings and redirects user to Application Launcher.

Stimulus: User clicks "Cancel" button.

Response: Odoo clears any changes made in the form.

3.1.3.3 Functional Requirements

- FR-11: Odoo shall allow users to change lead email alias.
- FR-12: Odoo shall allow users to make system-wide settings changes.

3.1.4 Core: Reporting

3.1.4.1 Description and Priority

Reporting is a tool that helps users get a better understanding of where the company's strengths, weaknesses, and opportunities are through metrics. The tool allows users to modify the fields, add filtering criteria, and change the way the metrics are displayed. To access this feature, users can choose the desired type of report after selecting the "Reports" menu item.

Priority: low

3.1.4.2 Stimulus/Response

Stimulus: User clicks "Measures" button.

Response: Odoo displays a list of information fields.

Stimulus: User selects or deselects an information field in the "Measures" dropdown.

Response: Odoo displays a report with the information field(s) that are selected.

Stimulus: User clicks the "+" icon in the report table.

Response: Odoo drills up the report for the selected field.

Stimulus: User clicks the "-" icon in the report table.

Response: Odoo drills down the report for the selected field.

Stimulus: User clicks "Flip Axis" icon.

Response: Odoo switches the two axes in the report table.

Stimulus: User clicks the "Expand" icon.

Response: Odoo expands the collapsed information fields.

Stimulus: User clicks the "Download Xls" icon.

Response: Odoo generates the report in Excel format and prompts the user to download the file.

Stimulus: User clicks a column header in the report table.

Response: Odoo sorts the report by the selected column header.

Stimulus: User clicks the "Pivot" icon.

Response: Odoo displays the Pivot view.

Stimulus: User clicks "Graph" icon.

Response: Odoo displays the Bar Chart.

Stimulus: User clicks "Bar Chart" in the Graph view.

Response: Odoo displays the Bar Chart.

Stimulus: User clicks "Line Chart" icon in the Graph view.

Response: Odoo displays the Line Chart.

Stimulus: User clicks "Pie Chart" icon in the Graph view.

Response: Odoo displays the Pie Chart.

3.1.4.3 Functional Requirements

- FR-13: Odoo shall open the Pivot view by default.
- FR-14: Odoo shall allow users to sort by column headers.
- FR-15: Odoo shall only sort one column header at a time.
- FR-16: Odoo shall sort a column header in descending order when it is sorted for the first time. If the column header is already sorted in descending order, Odoo shall sort it in ascending order. If a column header is already sorted in ascending order, Odoo shall sort it in descending order.
- FR-17: Odoo shall have three visual Graph views: Bar Chart, Line Chart, and Pie Chart.
- FR-18: Odoo shall display the Bar Chart when the Graph view is opened.
- FR-19: Odoo shall allow the user to toggle the following column headers in the Pipeline Analysis Report: Probability, Probable Turnover, Delay to Assign, Delay to Close, Total Revenue, Overpassed Deadline, Number of Activities, and Count.
- FR-20: Odoo shall allow the user to toggle the following column headers in the Activities Analysis Report: Probability and Count.
- FR-21: Odoo shall allow the user to toggle the following column headers in the Sales Analysis Report: Gross Weight, Number of Lines, Number of Quantity, Untaxed Total, Quantity to Invoice, Quantity Invoiced, Volume, Quantity Delivered, Total, and Count.
- FR-22: Odoo shall allow the user to download reports in Excel format.
- FR-23: Odoo shall notify the user when no displayable measures are selected.

3.2.1 CRM: Pipelines

3.2.1.1 Description and Priority

The Odoo Pipeline helps the user keep control of the sales process by providing a full view of leads, opportunities, and customers. A pipeline is created for each sales team. The sales pipeline is a visual representation of the sales process, from the first contact to the final sale. The Opportunities Pipeline view allows the user to see each opportunity's corresponding stage in the sales process. The view also provides high level information for each opportunity such as name, expected revenue, and sales team member.

Priority: high

3.2.1.2 Stimulus/Response

Opportunities Pipeline

Stimulus: User clicks “Kanban” view.

Response: Odoo displays the Kanban view.

Stimulus: User clicks “List” view.

Response: Odoo displays the List view.

Stimulus: User clicks “Graph” view.

Response: Odoo displays the Graph view.

Stimulus: User clicks “Calendar” view.

Response: Odoo displays the Calendar view.

Stimulus: User clicks the “Pivot” view.

Response: Odoo displays the Pipeline Analysis Report.

Stimulus: User clicks “Create” button.

Response: Odoo displays “Create an Opportunity” form.

Stimulus: User selects an Opportunity.

Response: Odoo displays the “Opportunity Details” page.

Stimulus: User hovers over “New”, “Qualified”, “Proposition”, “Won” or any user created column in the Kanban view.

Response: Odoo displays the number of records for the column in a tooltip.

Stimulus: User clicks “Settings” icon next to the Column title in the Kanban view.

Response: Odoo displays a list of menu items pertaining to that column.

Stimulus: User clicks “+” next to the Column title in the Kanban view.

Response: Odoo displays a “New Opportunity” textbox in the column.

Stimulus: User clicks “Add” in the “New Opportunity” textbox in the Kanban view.

Response: Odoo adds an Opportunity with the user-inputted name.

Stimulus: User clicks “Discard” in the New Opportunity textbox in the Kanban view.

Response: Odoo closes the textbox, clearing any user-inputted data.

Stimulus: User clicks star rating for an Opportunity in the Kanban view.

Response: Odoo assigns the star rating to the Opportunity.

Stimulus: User clicks an Opportunity and drags it to another column in the Kanban view.

Response: Odoo moves the Opportunity to the column where the mouse is released.

Stimulus: User clicks “Import” button under list view.

Response: Odoo opens “Import File” page.

Stimulus: User hovers over data report elements in a Chart view.

Response: Odoo displays textual information relevant to the item.

Create an Opportunity Form

Stimulus: User clicks “Create” within the form.

Response: Odoo creates the opportunity and closes the form, redirecting the user to “Opportunities Pipeline”.

Stimulus: User clicks “Discard” button or “Exit” icon.

Response: Odoo clears any user-inputted data in the form and closes the form.

Opportunity Details Page

Stimulus: User clicks “Edit” button.

Response: Odoo displays “Edit Opportunity Details” Form.

Stimulus: User clicks “Create” button.

Response: Odoo displays the “Create an Opportunity Form (Detailed)”.

Stimulus: User clicks “Action” menu.

Response: Odoo displays a list of Opportunity actions.

Stimulus: User clicks “New Quotation” button.

Response: Odoo displays New Quotation Form.

Stimulus: User clicks “Mark Won” button.

Response: Odoo moves the opportunity to the “Won” status.

Stimulus: User clicks “Mark Lost” button.

Response: Odoo displays “Lost Reason” Form.

Stimulus: User clicks “New”, “Qualified”, “Proposition”, or “Won” stages.

Response: Odoo changes the status of the Opportunity to the selected stage.

Stimulus: User clicks “Meeting” button.

Response: Odoo displays a weekly view of the meeting calendar with a filter showing meetings where the customer is an attendee.

Stimulus: User clicks “Quotes” button.

Response: Odoo displays the quotations related to the selected opportunity.

Stimulus: User clicks “Internal Notes” button.

Response: Odoo displays the Internal Notes for the Opportunity.

Stimulus: User clicks “Contact Information” button.

Response: Odoo displays the Contact Information for the Opportunity.

Stimulus: User presses “New Message” button on customer profile view.

Response: Odoo opens textbox form for user to type and send a message.

Stimulus: User presses “Log an internal note” button on customer profile view.

Response: Odoo opens text form for user to type and log an internal note.

Stimulus: User presses left or right arrows (<) (>) in customer profile view.

Response: Odoo navigates to the previous or next customer in the database.

Opportunity Details Page - Followers

Stimulus: User clicks “Follow” button that is displayed on customer profile view if user is not yet following the customer.

Response: Odoo indicates that user is now following the customer.

Stimulus: User clicks “Following” button that is displayed on customer profile view if user is already following the customer.

Response: Odoo indicates that the user is no longer following the customer.

Stimulus: User clicks person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the customer and options to allow the user to add followers or channels.

Stimulus: User clicks “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the customer.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the customer.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the customer.

Stimulus: User clicks a follower by clicking on the follower’s name.

Response: Odoo opens the follower’s profile view.

Edit Opportunity Details Form

Stimulus: User clicks “Save” button.

Response: Odoo saves the changes made to the opportunity and displays the “Opportunity Details” Page.

Stimulus: User clicks “Discard” button.

Response: Odoo clears any user-inputted changes and displays the Opportunity Details Page.

Create an Opportunity Form (Detailed)

-Same as Edit Opportunity Details Form-

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

Lost Reason Form

Stimulus: User clicks “Submit” in the Lost Reason Form.

Response: Odoo marks the Opportunity as Lost and archives the Opportunity.

Stimulus: User clicks “Cancel” or “Exit” in the Lost Reason Form.

Response: Odoo clears any user-inputted changes in the Lost Reason Form and displays the Opportunity Details Page.

Log an Activity Form

Stimulus: User clicks “Log & Schedule Next” in the Log an Activity Form.

Response: Odoo logs the activity and opens the Next Activity Scheduler.

Stimulus: User clicks “Log Only” in the Log an Activity Form.

Response: Odoo accepts the internal note and displays the Opportunity Details Page.

Next Activity Scheduler

Stimulus: User clicks “Schedule Activity” in the Next Activity Scheduler.

Response: Odoo schedules the Activity and returns the user to the Opportunity Details Page.

Stimulus: User clicks “No Activity” or “Exit” in the Next Activity Scheduler.

Response: Odoo clears the user input and displays the Opportunity Details Page.

3.2.1.3 Functional Requirements

Opportunities Pipelines Page

- FR-24: Odoo shall display the Kanban view by default.
- FR-25: Odoo shall allow the user to create new opportunities.
- FR-26: Odoo shall allow the user to drag and drop opportunities from one stage to another.
- FR-27: Odoo shall allow the user to perform the following actions on the Pipeline columns: Fold, Edit Stage, Delete, Archive Records, and Unarchive Records.
- FR-28: Odoo shall allow the user to perform the following Actions in the Opportunity Details Page: Delete, Duplicate, and Mark as Lost.
- FR-29: Odoo shall require new Columns to have a name.
- FR-30: Odoo shall display the Bar Chart in the Graph view by default.
- FR-31: Odoo shall allow the user to select one of the following Measures in the Graph view: Probability, Color Index, Days to Close, Days to Assign, Expected Revenue, Bounce, Count.
- FR-32: Odoo shall display Expected Revenue by default in the Graph view.
- FR-33: Odoo shall keep the selected Measure when the user changes between the Bar Chart, Line Chart, and Pie Chart.
- FR-34: Odoo shall allow the user to sort by the following fields in the List view: Create Date, Opportunity, Customer, Country, Next Activity Date, Next Activity Summary, Stage, Expected Revenue, Probability, Sales Team, and Salesperson.
- FR-35: Odoo shall display the Total Expected Revenue and Average Probability in the List view.
- FR-36: Odoo shall require the user to load a CSV or Excel file before validating or importing the file on the Import a File page.
- FR-37: Odoo shall require the user to display errors on the Import a File page if the columns in the CSV or Excel file are not supported.
- FR-38: Odoo shall display the Week view by default when the Calendar view is selected.

Create an Opportunity Form

- FR-39: Odoo shall require new Opportunities to have an Opportunity Title. If the user tries to create an Opportunity without an Opportunity Title, an error shall be displayed that says "The following fields are invalid: Opportunity Title".
- FR-40: Odoo shall allow the user to select customers from the customer database.

- FR-41: Odoo shall allow the user to edit and create new customers.
- FR-42: Odoo shall only allow Doubles in the Expected Revenue field.
- FR-43: Odoo shall allow the user to provide a rating of 1 star, 2 stars, or 3 stars.

Opportunity Details Page

- FR-44: Odoo shall display the Internal notes by default.
- FR-45: Odoo shall display the following Contact Information: Customer Name, Address, Contact Name, Title, Job Position, Mobile, Fax, Opt-Out, Marketing Campaign, Marketing Medium, Market Source, Referred By.
- FR-46: Odoo shall allow the user to send messages to customers in the Opportunity Details Page.
- FR-47: Odoo shall allow the user to add attachments to messages in the Opportunity Details Page.
- FR-48: Odoo shall allow the user to compose new messages in a pop up composer in the Opportunity Details Page.
- FR-49: Odoo shall display the activity related to the Opportunity in reverse chronological order.
- FR-50: Odoo shall require the user to input the Lost Reason if an Opportunity is marked as Lost.

Edit Opportunity Details Form

- FR-51: Odoo shall observe the same functional requirements that are written for the Opportunity Details Page.

Lost Reason Form

- FR-52: Odoo shall require the user to select a Lost Reason to mark an Opportunity as Lost.
- FR-53: Odoo shall allow the user to Create and Edit Lost reasons.

Log an Activity Form

- FR-54: Odoo shall require the user to select an Activity to “Log & Schedule Next” or “Log Only”. If the Activity field is empty, Odoo shall display “The following fields are invalid: Activity”.
- FR-55: Odoo shall allow the user to enter a Summary for the Activity.
- FR-56: Odoo shall allow the user to enter the Expected Revenue for the Activity. By default, the Expected Revenue is 1,000.00.
- FR-57: Odoo shall allow the user to enter the Expected Closing Date. By default, the Expected Closing is 15 days from the date the Activity is logged.

FR-58: Odoo shall allow the user to log a detailed message.

Create an Opportunity Form (Detailed)

FR-59: The Create an Opportunity Form (Detailed) shall have the same fields as the Edit Opportunity Details Form.

Next Activity Scheduler

FR-60: Odoo shall allow the user to select an Activity.

FR-61: Odoo shall allow the user to select a Next Activity Date.

FR-62: Odoo shall allow the user to add a Summary to the Next Activity.

FR-63: Odoo shall display Recommended Activities.

3.2.2 CRM: Customer Management

3.2.2.1 Description and Priority

The CRM allows users to track and communicate with customers. Users can schedule activities and meetings with customers, as well as track all quotes, sales orders, and invoices related to a customer.

Priority: high

3.2.2.2 Stimulus/Response

Customers Page

Stimulus: User clicks customer from “Customers” page.

Response: Odoo opens the “Customer Profile View” for the selected customer.

Stimulus: User types in search keywords in search bar.

Response: Odoo performs search within customer database and presents search results.

Stimulus: User clicks “List” icon.

Response: Odoo switches to list view.

Stimulus: User clicks “Import” button under list view.

Response: Odoo opens “Import File” page.

Stimulus: User marks checkboxes next to customers in list view.

Response: Odoo displays “Action” menu.

Customers Page - Action Menu

Stimulus: User clicks “Export” button.

Response: Odoo opens “Export Data” form and allows user to export customers to a CSV file.

Stimulus: User clicks "Archive" button.

Response: Odoo archives the customers that are selected.

Stimulus: User clicks "Unarchive" button.

Response: Odoo unarchives the customers that are selected.

Stimulus: User clicks "Delete" button.

Response: Odoo deletes the customers that are selected.

Stimulus: User clicks "Partner Mass Mailing" button.

Response: Odoo opens the "Partner Mass Mailing" form, allowing the user to send a message to all selected customers.

Stimulus: User clicks "Portal Access Management" button.

Response: Odoo opens "Portal Access Management" form, allowing user to modify contact rights to access the portal.

Stimulus: User clicks "Merge Selected Contacts" button.

Response: Odoo opens "Merge Selected Contacts" form, allowing user to merge customers.

New/Modify Customer Form

Stimulus: User clicks "Create" button.

Response: Odoo displays blank new/modify customer form.

Stimulus: User clicks "Company" dropdown on new/modify customer form.

Response: Odoo displays companies that have been created and allows user to select a company.

Stimulus: User clicks "Edit" icon on avatar section of new/modify customer form.

Response: file explorer window opens and allows user to select file to upload.

Stimulus: User clicks "Trash" icon on avatar section of new/modify customer form.

Response: Odoo clears the user's avatar, if any.

Stimulus: User clicks "Create" under "Contacts & Addresses" section on the new/modify customer form.

Response: Odoo opens "Contacts & Addresses" form on the same page.

Stimulus: User clicks "Save & Close" on the Contacts & Addresses form.

Response: Odoo saves the information entered and closes the form, returning the user to the new/modify customer form.

Stimulus: User clicks "Save & New" on the "Contacts & Addresses" form.

Response: Odoo saves the information entered and displays a new blank form.

Stimulus: User clicks "Discard" on the "Contacts & Addresses" form.

Response: Odoo closes the "Contacts & Addresses" form and returns to the new/modify customer form.

Stimulus: User clicks “Exit” icon next to an existing contact or address under the “Contacts & Addresses” form.

Response: Odoo deletes the contact or address entry associated with the customer.

Stimulus: User clicks “Internal Notes” section.

Response: Odoo displays free text field for users to enter notes.

Stimulus: User clicks “Sales & Purchases”.

Response: Odoo displays miscellaneous sales related options that a user can apply to customer.

Stimulus: User clicks “Accounting” section on new/modify customer form.

Response: Odoo displays related accounting fields.

Stimulus: User clicks “Save” button.

Response: Odoo saves the new customer and displays customer information page.

Stimulus: User clicks “Discard”.

Response: User returns to the customer profile view.

Customer Profile View

Stimulus: User presses “Archive” button on customer profile view.

Response: Odoo marks customer as Archived and updates the status.

Stimulus: User presses “Opportunities” button on customer profile view.

Response: Odoo takes user to the relevant pipeline related to the customer.

Stimulus: User presses “Meetings” button on customer profile view.

Response: Odoo displays a weekly view of the meeting calendar with a filter showing meetings where the customer is an attendee.

Stimulus: User presses “Activities” button on customer profile view.

Response: Odoo displays all activities relating to the customer.

Stimulus: User presses “\$(amount) Invoiced” button on customer profile view.

Response: Odoo displays all Invoices relating to the customer.

Stimulus: User presses “Sales” button on customer profile view.

Response: Odoo displays all quotations and sales relating to the customer.

Stimulus: User presses “New Message” button on customer profile view.

Response: Odoo opens textbox form for user to type and send a message.

Stimulus: User presses “Log an internal note” button on customer profile view.

Response: Odoo opens text form for user to type and log an internal note.

Stimulus: User presses left or right arrows (<) (>) in customer profile view.

Response: Odoo navigates to the previous or next customer in the database.

Customer Profile View - Followers

Stimulus: User clicks “Follow” button that is displayed on customer profile view if user is not yet following the customer.

Response: Odoo indicates that user is now following the customer.

Stimulus: User clicks “Following” button that is displayed on customer profile view if user is already following the customer.

Response: Odoo indicates that the user is no longer following the customer.

Stimulus: User clicks person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the customer and options to allow the user to add followers or channels.

Stimulus: User clicks “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the customer.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the customer.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the customer.

Stimulus: User clicks a follower by clicking on the follower’s name.

Response: Odoo opens the follower’s profile view.

Customer Profile View - Actions Menu

Stimulus: User clicks “Action” menu.

Response: Odoo displays menu of additional actions.

Stimulus: User clicks “Delete” from Action menu.

Response: customer record is deleted.

Stimulus: User clicks “Duplicate” from Action menu.

Response: Odoo opens new/modify customer form with a copy of the customer’s information with “(copy)” appended at the end of the customer’s name.

Stimulus: User clicks “Portal Access Management” from Action menu.

Response: Odoo opens Portal Access Management form, allowing user to manage a customer’s portal access.

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

3.2.2.3 Functional Requirements

Customers Page

FR-64: Odoo shall display all active customers on the “Customers Page”.

FR-65: Odoo shall display customers in kanban view by default, but have an option for a list view.

FR-66: Odoo shall allow users to select multiple customers to perform mass actions on the selected customers.

Import File Page

FR-67: Odoo shall allow users to import customers from a file.

FR-68: Odoo shall automatically validate an uploaded file prior to importing to verify the rows and columns are correct.

FR-69: The Import File Page shall have a help button linking to online documentation regarding the import feature.

New/Modify Customer Form

FR-70: Odoo shall allow users to create new customers.

FR-71: Odoo shall accept customers or individuals as valid customers in the system.

FR-72: Users shall be able to upload avatars for each customer.

- FR-73: The modify customer form shall mimic the new customer form except that the modify customer form will contain the existing customer's information.
- FR-74: Odoo shall check the new/modify form for updated information and prompt user to confirm discarding changes when navigating off the form prior to saving.
- FR-75: Odoo shall allow customers to have additional related contacts and addresses.

Customer Profile View

- FR-76: Odoo shall allow users to send messages to customers from the customer profile view.
- FR-77: Odoo shall allow users to log internal notes only visible to other users.
- FR-78: Odoo shall display a history of interaction with the customer on the customer profile view.
- FR-79: Odoo shall allow users to track a customer's opportunities, meetings, and activities from the customer profile view.
- FR-80: Odoo shall allow users to archive and unarchive users.
- FR-81: Odoo shall allow users to view the immediate customer before and after the current customer when in customer profile view, without needing to return to the Customers Page.
- FR-82: Odoo shall track a customer's related quotes and sales.

Customer Profile View - Followers

- FR-83: Odoo shall allow users to follow and track customers.

Customer Profile View - Actions

- FR-84: Odoo shall allow users to delete customers altogether.
- FR-85: Odoo shall allow users to duplicate existing customers.
- FR-86: Odoo shall allow users to manage a customer's portal access.

3.2.3 CRM: Next Activities

3.2.3.1 Description and Priority

Next Activities displays an overview of all follow up activities that have been set for opportunities within the pipelines for all of the sales teams. New opportunities can be created from this section as well.

Priority: medium

3.2.3.2 Stimulus/Response

Next Activities Page

Stimulus: User clicks opportunity from “Next Activities” page.

Response: Odoo opens the opportunity view for the selected opportunity.

Stimulus: User types in search keywords in search bar.

Response: Odoo performs search within the list of next activities that are scheduled and presents search results.

Stimulus: User clicks “Kanban” icon.

Response: Odoo displays kanban view of next activities in a view similar to Section 3.2.1.2, “Opportunities Pipelines Page”.

Stimulus: User clicks “Calendar” icon.

Response: Odoo displays weekly view of a meeting calendar.

Stimulus: User clicks “Pivot” icon.

Response: Odoo displays the Pivot Chart view.

Stimulus: User clicks the “Graph” icon.

Response: Odoo displays the Bar Chart view, similar to Section 3.1.3.2, “Reporting”

Stimulus: User clicks “Import” button.

Response: Odoo opens “Import File” page.

Stimulus: User marks checkboxes next to customers in list view.

Response: Odoo displays “Action” menu.

Stimulus: User clicks “Create” button.

Response: Odoo opens “Create/Modify Activity” form.

Next Activities Page - Action Menu

Stimulus: User clicks “Export”.

Response: Odoo opens “Export Data” form and allows user to export opportunities to a CSV file.

Stimulus: User clicks “Delete”.

Response: Odoo deletes the opportunities that are selected.

Stimulus: User clicks “Convert to opportunities”.

Response: Odoo opens the “Convert to opportunities” form, allowing user to convert the opportunity selected to an opportunity in a pipeline, or to merge with an existing opportunity.

Stimulus: User clicks “Merge leads/opportunities”.

Response: Odoo opens “Merge leads/opportunities” form and allows user to assign the opportunity to a salesperson or sales team and allows user to merge opportunities

Stimulus: User clicks “Lead/Opportunity Mass Mail”.

Response: Odoo opens the “Lead/Opportunity Mass Mail” form, allowing the user to send a message to contacts associated with all selected opportunities.

Stimulus: User clicks “Mark Lost” button on the next activity page action menu.

Response: Odoo opens the “Lost Reason” form; user submits a reason for marking the opportunity as lost; Odoo archives the opportunity.

New/Modify Activity Form

Stimulus: User clicks “Customer” dropdown on the create/modify next activity form.

Response: Odoo displays valid customers and auto-populates the form with the customer’s information.

Stimulus: User clicks “Contact Information” button.

Response: Odoo displays additional customer contact information fields with auto-populated information.

Stimulus: User clicks “New Quotation” button.

Response: Odoo displays New Quotation Form.

Stimulus: User clicks “Mark Won” button.

Response: Odoo moves the opportunity to the “Won” status.

Stimulus: User clicks “Mark Lost” button.

Response: Odoo displays “Lost Reason” Form.

Stimulus: User clicks “Quotes” button.

Response: Odoo displays quotes related to the opportunity selected

Stimulus: User clicks “Internal Notes” button.

Response: Odoo displays the Internal Notes for the Opportunity.

Stimulus: User clicks “Contact Information” button.

Response: Odoo displays the Contact Information for the Opportunity.

Stimulus: User clicks “New Message” button.

Response: Odoo displays a form for the user to send a message to the Customer.

Next Activity View

Stimulus: User clicks “Edit” button.

Response: Odoo displays “Edit Opportunity Details” Form.

Stimulus: User clicks “Create” button.

Response: Odoo displays the “Create an Opportunity Form (Detailed)”.

Stimulus: User clicks “Action” menu.

Response: Odoo displays a list of Opportunity actions.

Stimulus: User clicks “New Quotation” button.

Response: Odoo displays New Quotation Form.

Stimulus: User clicks “Mark Won” button.

Response: Odoo moves the opportunity to the “Won” status.

Stimulus: User clicks “Mark Lost” button.

Response: Odoo displays “Lost Reason” Form.

Stimulus: User clicks “New”, “Qualified”, “Proposition”, or “Won” stages.

Response: Odoo changes the status of the Opportunity to the selected stage.

Stimulus: User clicks “Meeting” button.

Response: Odoo displays a weekly view of the meeting calendar with a filter showing meetings where the customer is an attendee.

Stimulus: User clicks “Quotes” button.

Response: Odoo displays the quotations related to the selected opportunity.

Stimulus: User clicks “Internal Notes” button.

Response: Odoo displays the Internal Notes for the Opportunity.

Stimulus: User clicks “Contact Information” button.

Response: Odoo displays the Contact Information for the Opportunity.

Stimulus: User presses “New Message” button.

Response: Odoo opens textbox form for user to type and send a message.

Stimulus: User presses “Log an internal note” button.

Response: Odoo opens text form for user to type and log an internal note.

Stimulus: User presses left or right arrows (<) (>).

Response: Odoo navigates to the previous or next customer in the database.

Next Activity View - Followers

Stimulus: User clicks “Follow” button that is displayed on customer profile view if user is not yet following the customer.

Response: Odoo indicates that user is now following the customer.

Stimulus: User clicks “Following” button that is displayed on customer profile view if user is already following the customer.

Response: Odoo indicates that the user is no longer following the customer.

Stimulus: User clicks person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the customer and options to allow the user to add followers or channels.

Stimulus: User clicks “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the customer.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the customer.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the customer.

Stimulus: User clicks a follower by clicking on the follower’s name.

Response: Odoo opens the follower’s profile view.

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

Lost Reason Form

Stimulus: User clicks “Submit” button.

Response: Odoo marks the Opportunity as Lost and archives the Opportunity.

Stimulus: User clicks “Cancel” or “Exit” button.

Response: Odoo clears any user-inputted changes in the Lost Reason Form and displays the Opportunity Details Page.

Log an Activity Form

Stimulus: User clicks “Log & Schedule Next” button.

Response: Odoo logs the activity and opens the Next Activity Scheduler.

Stimulus: User clicks “Log Only” button.

Response: Odoo accepts the internal note and displays the Opportunity Details Page.

Next Activity Scheduler

Stimulus: User clicks “Schedule Activity” button.

Response: Odoo schedules the Activity and returns the user to the Opportunity Details Page.

Stimulus: User clicks “No Activity” or “Exit” button.

Response: Odoo clears the user input and displays the Opportunity Details Page.

3.2.3.3 Functional Requirements

Next Activities Page

- FR-87: Odoo shall display an overview of all scheduled next activities and display columns containing relevant information pertaining to the next activity.
- FR-88: Odoo shall display next activities in a list view by default, but have an option for a list view.
- FR-89: Odoo shall have search functionality within the next activities page and allow for filter and groupings to be used.
- FR-90: Searches should be saveable as user favorites.
- FR-91: Odoo shall allow users to select multiple opportunities to perform mass actions on the selected opportunities.
- FR-92: Odoo shall allow user to click columns of information to sort all of the next activities in the view.

Import File Page

- FR-93: Odoo shall allow users to import customers from a file.
- FR-94: Odoo shall automatically validate an uploaded file prior to importing to verify the rows and columns are correct.
- FR-95: The Import File Page shall have a help button linking to online documentation regarding the import feature.

New/Modify Next Activity Form

- FR-96: Odoo shall allow users to create new opportunities.
- FR-97: The modify next activity form shall mimic the new next activity form except that the modify next activity form will contain the existing activity’s details.
- FR-98: Odoo shall check the new/modify form for updated information and prompt user to confirm discarding changes when navigating off the form prior to saving.

Next Activity View

- FR-99: Odoo shall allow users to send messages from the activity view.
- FR-100: Odoo shall allow users to log internal notes on activities only visible to other users.
- FR-101: Odoo shall display a history of interaction with the opportunity on the activity view.
- FR-102: Odoo shall allow users to track an activity's related meetings and quotes from the activity view.
- FR-103: Odoo shall allow users to mark an opportunity as won or lost.
- FR-104: Odoo shall allow users to create new quotes and log activity on the activity view.
- FR-105: Odoo shall allow users to view the immediate opportunity before and after the current opportunity when in next activity view, without needing to return to the Next Activities Page.
- FR-106: Odoo shall allow users to follow and track opportunities.
- FR-107: Odoo shall allow users to delete opportunities altogether.
- FR-108: Odoo shall allow users to duplicate existing opportunities.

3.3.1 Sales: Quotations

3.3.1.1 Description and Priority

The Sales application allows users to quickly view, edit, and create quotations. There is a high level view that allows the user to see all of the current quotations and their status. The application allows salespeople to create them efficiently through the use of predefined products, price lists, and templates. Users are able to modify existing quotations and progress them through the sales process.

Priority: high

3.3.1.2 Stimulus/Response

Quotations Page

Stimulus: User clicks quotation displayed on Quotations page.

Response: Odoo opens quotation view page for the selected quotation.

Stimulus: User types in search keywords in search bar.

Response: Odoo performs search within the list of quotations and presents search results.

Stimulus: User clicks "Kanban" icon

Response: Odoo displays kanban view of next activities in a view similar to Section 3.2.1.2, "Opportunities Pipelines Page".

Stimulus: User clicks “Calendar” icon.

Response: Odoo displays weekly view of a meeting calendar.

Stimulus: User clicks “Pivot” icon.

Response: Odoo displays the Pivot Chart view.

Stimulus: User clicks the “Graph” icon.

Response: Odoo displays the Bar Chart view, similar to Section 3.1.3.2, “Reporting”.

Stimulus: User clicks “Import” button.

Response: Odoo opens “Import File” page.

Stimulus: User marks checkboxes next to quotation in list view.

Response: Odoo displays “Action” and “Print” menus.

Stimulus: User clicks “Create” button.

Response: Odoo opens “Create/Modify Quotation” form.

Quotations Page - Action and Print Menus

Stimulus: User clicks “Export” in the quotations page action menu.

Response: Odoo opens “Export Data” form and allows user to export data to a CSV file.

Stimulus: User clicks “Delete” in the quotations page action menu.

Response: Odoo deletes the quotations that are selected.

Stimulus: User clicks “Invoice Order” button.

Response: Odoo opens the “Invoice Order” form, allowing user to create and view invoices for the quotations selected.

Stimulus: User clicks “Quotation/Order” button.

Response: Odoo generates the selected quotes as PDFs and allows user to download.

Create/Modify Quotations Form

Stimulus: User clicks “Customer” drop-down list in the “Create/Modify Quotation” form.

Response: Odoo displays all customers in the database and allows the user to select a customer.

Stimulus: User clicks “Order Date” drop down menu.

Response: Odoo displays the current date-and-time along with a calendar pop-up for a user-selected date-and-time.

Stimulus: User clicks “Expiration Date” drop down menu.

Responses: Odoo displays a calendar pop-up for a user-selected expiration date.

Stimulus: User clicks “Payment Terms”.

Response: Odoo displays a drop down list of three conditional terms: 15 days, 30 Net Days, and Immediate Payment.

Stimulus: User clicks “Order Line”.

Response: Odoo displays a list of customer ordered items.

Stimulus: User clicks “Add an item”.

Response: Odoo displays available products and services or allow users to create products on-the-fly.

Stimulus: User clicks “Other Information”.

Response: Odoo displays sales information and invoicing which can be filtered by salesperson, sales team, customer reference, and fiscal position.

Stimulus: User clicks “Setup default terms and conditions in your company settings” textfield.

Response: Odoo will allow the user to add a custom description of the terms and conditions.

Stimulus: User clicks “Send By Email”.

Response: Odoo will send the sales order to the selected customer.

Stimulus: User clicks “Confirm Sale” in the “Create/Modify Quotation” form.

Response: Quotations becomes a sales order. The user can now view the sales order in the sales order page.

Quotations View

Stimulus: User presses “Edit” button.

Response: Odoo opens the Create/Modify Quotations form for the quotation currently open.

Stimulus: User presses “Create” button.

Response: Odoo opens a blank Create/Modify Quotations form.

Stimulus: User presses “Print” menu drop down.

Response: Odoo displays the print menu in the earlier section, “Quotations Page - Action and Print Menus”.

Stimulus: User presses “Action” menu drop down.

Response: Odoo displays the action menu in the earlier section, “Quotations Page - Action and Print Menus”.

Stimulus: User presses “Send by email” button.

Response: Odoo opens a text editor and allows user to email the sales quotation to recipients, updates quotation status to “Quotation sent” if user sends email.

Stimulus: User presses “Confirm sale” button.

Response: Odoo updates the quotation status to “Sales order” and converts it to a sales order.

Side note: at this point, the view crosses into sales order view and is no longer considered a quotation

Stimulus: User presses “Print” button.

Response: Odoo generates the selected quotes as PDFs and allows user to download.

Stimulus: User presses “Cancel” button.

Response: Odoo changes quotation status to “Cancelled”.

Stimulus: User presses “New Message” button on quotations view.

Response: Odoo opens textbox form for user to type and send a message.

Stimulus: User presses “Log an internal note” button on quotations view.

Response: Odoo opens text form for user to type and log an internal note.

Stimulus: User presses left or right arrows (<) (>) in quotations view.

Response: Odoo navigates to the previous or next quotation in the database.

Quotations View – Followers

Stimulus: User presses “Follow” button that is displayed on quotation view if user is not yet following the quotation.

Response: Odoo indicates that user is now following the quotation.

Stimulus: User presses “Following” button that is displayed on quotation profile view if user is already following the quotation.

Response: Odoo indicates that the user is no longer following the quotation.

Stimulus: User presses person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the quotation and options to allow the user to add followers or channels.

Stimulus: User presses “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the quotation.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the quotation.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the quotation.

Stimulus: User clicks a follower by clicking on the follower’s name.

Response: Odoo opens the follower’s profile view.

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

3.3.1.3 Functional Requirements

Create/Modify Quotations Form

- FR-109: Odoo shall update the Quotation from Quotation to Quotation Sent when it is printed or sent by email.
- FR-110: Odoo shall allow the user to enter the following fields for Quotations: Customer, Order Date, Expiration Date, Payment Terms, Products, Item Description, Ordered Quantity, Unit Price, Taxes, Subtotal, Untaxed Amount, Taxes, Total, and Terms and Conditions.
- FR-111: Odoo shall not allow fields to be modified when a Quotation is locked.
- FR-112: Odoo shall observe the *Customer Profile View - Followers* for the followers section.
- FR-113: Odoo shall omit any user changes made if user clicks cancel.
- FR-114: A Salesperson is required to create a quotation.
- FR-115: A Customer is required to create a quotation.
- FR-116: An Ordered Date is required to create a quotation.
- FR-117: Odoo shall not allow users to edit order lines, customers and confirmed sales dates on locked quotation.
- FR-118: Odoo Shall allow users to create and edit new quotation.
- FR-119: Odoo shall display an error message if required input field is missing from a new quotation.
- FR-120: Odoo shall display an error message if Customer field, Invoice Address, Delivery Address, Price List and Currency input field is missing from a new sales quotation.

3.3.2 Sales: Sales Orders

3.3.2.1 Description and Priority

Sales Orders are sent to the customer confirming a product purchase. From there, users are able to invoice sales orders and collect payments. Users can organize, view and manage multiple Sales Orders fast and efficiently.

Priority: high

3.3.2.2 Stimulus/Response

Sales Order Page

Stimulus: User clicks a Sales Order.

Response: Odoo opens Sales Order view for the selected sales order.

Stimulus: User types in search keywords in search bar.

Response: Odoo performs search within the list of quotations and presents search results.

Stimulus: User clicks “Kanban” icon.

Response: Odoo displays Kanban View of next activities in a view similar to Section 3.2.1.2, “Opportunities Pipelines Page”.

Stimulus: User clicks “Calendar” icon.

Response: Odoo displays weekly view of a meeting calendar.

Stimulus: User clicks “Pivot” icon.

Response: Odoo displays the Pivot Chart view.

Stimulus: User clicks the “Graph” icon.

Response: Odoo displays the Bar Chart view, similar to Section 3.1.3.2, “Reporting” .

Stimulus: User clicks “Import” button.

Response: Odoo opens “Import File” page.

Stimulus: User marks checkboxes next to quotation in list view.

Response: Odoo displays “Action” and “Print” menus.

Stimulus: User clicks “Create” button.

Response: Odoo opens “Create/Modify Sales Order” form.

Sales Order Page - Action and Print Menus

Stimulus: User clicks “Export” in the quotations page action menu.

Response: Odoo opens “Export Data” form and allows user to export data to a CSV file.

Stimulus: User clicks “Delete” in the quotations page action menu.

Response: Odoo deletes the quotations that are selected.

Stimulus: User clicks “Invoice Order”.

Response: Odoo opens the “Invoice Order” form, allowing user to create and view invoices for the quotations selected.

Stimulus: User clicks “Quotation/Order” in the quotations page print menu.

Response: Odoo generates the selected quotes as PDFs and allows user to download.

Create/Modify Sales Order Form

Stimulus: User clicks “Create” button.

Response: Odoo displays a new Sales Order form.

Stimulus: User clicks “Customer” dropdown list.

Response: Odoo displays all customers in the database and allows the user to select a customer.

Stimulus: User clicks “Order Date” drop down menu.

Response: Odoo displays the current date-and-time along with a calendar pop-up for a user-selected date-and-time.

Stimulus: User clicks “Expiration Date” dropdown menu.

Responses: Odoo displays a calendar pop-up for a user-selected expiration date.

Stimulus: User clicks “Payment Terms”.

Response: Odoo displays a drop down list of three conditional terms: 15 days, 30 Net Days, and Immediate Payment.

Stimulus: User clicks “Order Line”.

Response: Odoo displays a list of customer ordered items.

Stimulus: User clicks “Add an item”.

Response: Odoo displays available products and services or allow users to create products on-the-fly.

Stimulus: User clicks “Other Information”.

Response: Odoo displays sales information and invoicing which can be filtered by salesperson, sales team, customer reference, and fiscal position.

Stimulus: User clicks “Setup default terms and conditions in your company settings” textfield.

Response: Odoo allows the user to add a custom description of the terms and conditions.

Stimulus: User clicks “Send By Email”.

Response: Odoo will send the sales order to the selected customer.

Stimulus: User clicks “Confirm Sale”.

Response: Odoo updates the Quotation to become a Sales Order. The user can now view the sales order in the Sales Order page .

Sales Order View

Stimulus: User clicks “Edit” button.

Response: Odoo opens the “Create/Modify Sales Order” form for the quotation currently open.

Stimulus: User clicks "Create" button.

Response: Odoo opens a blank "Create/Modify Sales Order" form.

Stimulus: User clicks "Print" menu dropdown.

Response: Odoo displays the print menu in the earlier section, "Sales Order Page - Action and Print Menus" .

Stimulus: User clicks "Action" menu dropdown.

Response: Odoo displays the action menu in the earlier section, "Sales Order Page - Action and Print Menus".

Stimulus: User clicks "Create Invoice" button.

Response: Odoo opens "Invoice Order" form.

Stimulus: User clicks "Print" button.

Response: Odoo generates the selected quotes as PDFs and allows user to download.

Stimulus: User clicks "Send by email" button.

Response: Odoo opens a text editor and allows user to email the sales quotation to recipients.

Stimulus: User clicks "Cancel" button.

Response: Odoo changes sales order status to "Cancelled".

Stimulus: User clicks "Lock" button.

Response: Odoo changes sales order status to "Locked".

Stimulus: User clicks "New Message" button.

Response: Odoo opens textbox form for user to type and send a message.

Stimulus: User clicks "Log an internal note" button.

Response: Odoo opens text form for user to type and log an internal note.

Stimulus: User clicks left or right arrows (<) (>) in quotations view.

Response: Odoo navigates to the previous or next quotation in the database.

Sales Order View - Followers

Stimulus: User clicks "Follow" button.

Response: Odoo indicates that the user is now following the Sales Order.

Stimulus: User clicks "Following" button that is displayed on Sales Order profile view if user is already following the Sales Order.

Response: Odoo indicates that the user is no longer following the Sales Order.

Stimulus: User clicks person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the Sales Order and options to allow the user to add followers or channels.

Stimulus: User clicks "Add Followers" menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the Sales Order.

Stimulus: User clicks “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the Sales Order.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the Sales Order.

Stimulus: User clicks a follower by clicking on the follower’s name.

Response: Odoo opens the follower’s profile view.

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

3.3.2.3 Functional Requirements

Create a new sales order

FR-121: A Salesperson is required to create a Sales Order.

FR-122: A Customer is required to create a Sales Order.

FR-123: An Ordered Date is required to create a Sales Order.

FR-124: Odoo shall not allow users to edit order lines, customers and confirmed sales dates on locked Sales Order.

- FR-125: Odoo shall allow users to create and edit new Sales Order.
- FR-126: Odoo shall display an error message if required input field is missing from a new sales order quotation.
- FR-127: Odoo shall display an error message if Customer field is missing from a new sales order quotation.
- FR-128: Odoo shall display an error message if Invoice Address field is missing from a new sales order quotation.
- FR-129: Odoo shall display an error message if Delivery Address field is missing from a new sales order quotation.
- FR-130: Odoo shall display an error message if Price List input field is missing from a new sales order quotation.
- FR-131: Odoo shall display an error message if Currency input field is missing from a new sales order quotation.

Sales Order - Followers

- FR-132: Odoo shall allow the user to follow the displayed Sales Order if the user is not following the Sales Order.
- FR-133: Odoo shall allow the user to unfollow the displayed Sales Order if the user is following the Sales Order.

Import File Page

- FR-134: Odoo shall allow users to import customers from a file.
- FR-135: Odoo shall automatically validate an uploaded file prior to importing to verify the rows and columns are correct.
- FR-136: The Import File Page shall have a help button linking to online documentation regarding the import feature.

3.3.3 Sales: Products

3.3.3.1 Description and Priority

Every item that you sell on Odoo is a product, service or a consumable. Add products, details and prices easily with the Sales application. To grab your customer's attention, users can upload product images, set custom prices and offer special discounts. Quickly and efficiently, users can also view, organize and keep track of all products to sell. Know exactly how a product is doing; users can see which customers purchase what product, check the amount of products sold and see the amount of revenue generated.

Priority: high

3.3.3.2 Stimulus/Response

Products Page

Stimulus: User clicks “Products” from Sales Menu Bar Under “Sales”.

Response: Odoo displays a list of active and archived products.

Stimulus: User clicks “Kanban” icon.

Response: Odoo displays a Kanban view of active and archived products along with product image, product name, and price.

Stimulus: User clicks “List” icon.

Response: Odoo displays a List view of active and archived products along with product internal reference, product name, and sale price, product cost, internal category, and product type.

Stimulus: User types in search keywords in search bar.

Response: Odoo performs a search within the list of products and presents search results which can be filtered by internal reference, name, sales price, cost, internal category, product type and whether it can be sold or can be purchased.

Create/Modify Products Form

Stimulus: User clicks “Product Name”.

Response: Odoo displays a text field for the Product Name the user wants to specify.

Stimulus: User clicks “Edit” icon on avatar section.

Response: File explorer window opens and allows user to select file to upload.

Stimulus: User check marks “Can be Sold”.

Response: Odoo marks the product with whether the user decides if the product can be sold or not.

Stimulus: User check marks “Can be Purchased”.

Response: Odoo marks the product with whether the user decides if the product can be purchased or not.

Stimulus: User clicks “Product Type”.

Response: Odoo displays a drop-down list detailing whether the user decides if the product is a service or a consumable.

Stimulus: User clicks “Internal Reference”.

Response: Odoo displays a blank text field for a product code or reference the user can specify.

Stimulus: User clicks “Sales Price”.

Response: Odoo displays a text field the user can specify for the amount which the product is to be sold or purchased.

Stimulus: User clicks “Cost”.

Response: Odoo displays a text field for the user to specify the actual cost of the product.

Stimulus: User clicks “Active”.

Response: By default, Odoo marks the product active.

Stimulus: User clicks "Archive".

Response: As an option, Odoo can mark a product to be archived only; later to be active.

Product Details Page

Stimulus: User clicks "Edit".

Response: Odoo opens Edit Products Details Page.

Stimulus: User clicks "Print".

Response: Odoo generates a product label for the selected product as PDF and allows user to download.

Stimulus: User clicks "Action".

Response: Odoo displays a drop down list of options to delete and/or duplicate a product.

Stimulus: User clicks "General Information".

Response: Odoo displays product details including: product type, internal reference, bar code, sale price and cost in a read-only format.

Stimulus: User clicks "Sales".

Response: Odoo displays all related sales orders for the selected product.

Stimulus: User clicks "Invoicing".

Response: Odoo displays current policies and taxes (customer and vendor) for the selected product.

Stimulus: User clicks "Notes".

Response: Odoo displays any additional notes about the product and descriptions for quotations.

Stimulus: User clicks "Active".

Response: Odoo will mark the product active for sales and purchases.

Stimulus: User clicks "Archive".

Response: Odoo will mark the product for archiving.

Product View - Followers

Stimulus: User clicks "Follow" button that is displayed on Product view if user is not yet following the product.

Response: Odoo indicates that user is now following the product.

Stimulus: User presses "Following" button that is displayed on product profile view if user is already following the product.

Response: Odoo indicates that the user is no longer following the product.

Stimulus: User presses person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the product and options to allow the user to add followers or channels.

Stimulus: User presses “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the product.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the product.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the product.

Stimulus: User clicks a follower by clicking on the follower’s name

Response: Odoo opens the follower’s profile view.

Import File Page

Stimulus: User clicks “Load File” button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks “Reload File” button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks “Help” button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks “Validate” button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks “Import” button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks “Cancel” button.

Response: Odoo returns to customer list view.

3.3.3.3 Functional Requirements

Error Handling and Exceptions

FR-137: Odoo shall display an error message if Product name field is missing when user saves a new product.

FR-138: Internal reference must be unique when creating a new product.

FR-139: Odoo shall allow the user to edit and specify product name, the amount of the product to be sold or purchased and the actual cost of the product.

Action Interface

- FR-140: Odoo shall display a text field for the Product Name the user wants to specify.
- FR-141: Odoo shall display a checkbox field whether the user decides if the product can be sold.
- FR-142: Odoo shall display a checkbox field whether the user decides if the product can be purchased.
- FR-143: Odoo shall display a drop-down list detailing whether the user decides if the product is a service or a consumable.
- FR-144: Odoo shall display a text field for the amount of product to be sold or purchased.
- FR-145: Odoo shall display a text field for the user to specify the actual cost of the product.

3.3.4 Sales: Sales to Invoice

3.3.4.1 Description and Priority

The Sales application displays a status showing all available orders ready to be invoice. Users can find all orders and send sales invoices one-after-another or, keep track, manage and send multiple sale invoices all at once.

Priority: high

3.3.4.2 Stimulus/Response

Sales to Invoice Page

Stimulus: User clicks "Sales to Invoice" from Sales Menu Bar Under "Invoicing".

Response: Odoo displays a list of confirmed Sales Invoices.

Stimulus: User clicks "Kanban" icon.

Response: Odoo displays a Kanban view of confirmed Sales to Invoice.

Stimulus: User clicks "calendar" icon.

Response: Odoo displays a calendar view of confirmed Sales to Invoice dates.

Stimulus: User clicks "Pivot" icon.

Response: Odoo displays a pivot chart of Sales to Invoice.

Stimulus: User clicks "Exit" icon.

Response: Odoo deletes selected Sales Invoice.

Stimulus: User clicks "Graph" icon.

Response: Odoo displays a detailed graphical view of Sales to Invoices.

Create/Modify Sales to Invoice Form

Stimulus: User clicks “Create” button in the Sales to Invoice View Page.

Response: Odoo displays a Create/Modify Sales to Invoice Form.

Stimulus: User clicks “Customer” drop-down list in the Create/Modify Sales to Invoice Form.

Response: Odoo displays all customers in the database and allows the user to select a customer.

Stimulus: User clicks “Order Date” drop down menu in the Create/Modify Sales to Invoice Form.

Response: Odoo displays the current date-and-time along with a calendar pop-up for a user-selected date-and-time.

Stimulus: User clicks “Expiration Date” drop down menu in the Create/Modify Sales to Invoice Form.

Responses: Odoo displays a calendar pop-up for a user-selected expiration date.

Stimulus: User clicks “Payment Terms” in the Create/Modify Sales to Invoice Form.

Response: Odoo displays three conditional terms: 15 days, 30 Net Days, and Immediate Payment.

Stimulus: User clicks “Order Line” in the Create/Modify Sales to Invoice Form.

Response: Odoo displays a list of customer ordered items.

Stimulus: User clicks “Add an item” in the Create/Modify Sales to Invoice Form.

Response: Odoo displays available products and services or allow users to create products on-the-fly.

Stimulus: User clicks “Other Information” in the Create/Modify Sales to Invoice Form.

Response: Odoo displays sales information and invoicing which can be filtered by salesperson, sales team, customer reference, and fiscal position.

Stimulus: User clicks “Setup default terms and conditions in your company settings textfield”.

Response: Odoo will allow the user to add a custom description of the terms and conditions.

Stimulus: User clicks “Send By Email”.

Response: Odoo will send the Sales to Invoice to the selected customer.

Stimulus: User clicks “Confirm Sale” in the Create/Modify Sales to Invoice Form.

Response: Quotations becomes a Sales Order. The user can now view the Sales Invoice in the sales order page.

Sales to Invoice Details Page

Stimulus: User clicks a sales invoice from the list in the Sales to Invoice View Page.

Response: Odoo displays details of the Sales Invoice including customer name, confirmed date, payment terms, Order Line and total amount including taxes or any discounts.

Stimulus: User clicks “Cancel” button in the Sales to Invoice Details Page.

Response: Odoo will omit any user changes made to a Sales Invoice.

Stimulus: User clicks “Lock” button in the Sales to Invoice Details Page.

Response: Odoo will lock a selected Sales to Invoice from any user changes.

Stimulus: User clicks “Actions” in the Sales to Invoice Details Page.

Response: Odoo will display a drop down list of options to delete, duplicate, and invoice order for a Sales Invoice.

Stimulus: User clicks “Print” in the Sales to Invoice Details Page.

Response: Odoo will print the currently selected Sales Invoice.

Stimulus: User clicks “Edit” button in the Sales to Invoice Details Page.

Response: Odoo will reopen a Sales to Invoice form and will allow the user to edit an Order Line.

Stimulus: User clicks “Import” button under list view.

Response: Odoo opens “Import a file” page and allows the user to import a Sales to Invoice.

Stimulus: User clicks “Internal Notes” in the Sales to Invoice Details Page.

Response: Odoo displays the Internal Notes for the Sales to Invoice.

Stimulus: User clicks “Contact Information” in the Sales to Invoice Details Page.

Response: Odoo displays the Contact Information for the Opportunity.

Stimulus: User clicks “New Message” in the Sales to Invoice Details Page.

Response: Odoo displays a form for the user to send a message to the Customer.

Sales to Invoice Page - Followers

Stimulus: User clicks “Follow” button that is displayed on customer profile view if user is not yet following the customer.

Response: Odoo indicates that user is now following the customer.

Stimulus: User clicks “Following” button that is displayed on customer profile view if user is already following the customer.

Response: Odoo indicates that the user is no longer following the customer.

Stimulus: User clicks person icon with number next to it.

Response: Odoo displays followers menu with a list of users following the customer and options to allow the user to add followers or channels.

Stimulus: User clicks “Add Followers” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add other users to follow the customer.

Stimulus: User presses “Add Channels” menu item on the followers menu.

Response: Odoo opens “Invite Follower” form and allows user to add channels to follow the customer.

Stimulus: User clicks “Edit” icon next to a follower’s name.

Response: Odoo opens “Edit Subscription” form and allows user to check mark which sections the user should subscribe to.

Stimulus: User clicks “Exit” icon next to a follower’s name.

Response: Odoo removes user as a follower of the customer.

Stimulus: User clicks a follower by clicking on the follower's name.

Response: Odoo opens the follower's profile view.

Import File Page

Stimulus: User clicks "Load File" button.

Response: file explorer opens, allowing user to select a file to import.

Stimulus: User clicks "Reload File" button.

Response: Odoo reopens the selected file for upload.

Stimulus: User clicks "Help" button.

Response: Odoo opens new tab displaying online help documentation.

Stimulus: User clicks "Validate" button.

Response: Odoo validates the rows in the file to be imported.

Stimulus: User clicks "Import" button.

Response: Odoo imports the rows as customers.

Stimulus: User clicks "Cancel" button.

Response: Odoo returns to customer list view.

3.3.4.3 Functional Requirements

Creating New Sales to Invoice

FR-146: Odoo shall display a text field for the Customer Name the user wants to specify or select.

FR-147: Odoo shall display a pop-up calendar if the user specify a different sales invoice order date.

FR-148: Odoo shall display a pop-up calendar if the user specify a Sales to Invoice Expiration Date.

FR-149: Odoo shall display a drop-down list detailing whether the user decides if conditional terms are: 15 days, 30 Net Days, and Immediate Payment.

FR-150: Odoo shall display the following Order Lines of confirmed sales invoices: Product Name, Description: Quantity Ordered, Delivered Status, UnitPrice, Taxes, and Sub Total.

FR-151: Odoo shall display a text field for the user to specify the Terms and Conditions for Sales to Invoice.

FR-152: Odoo shall display available products and services or allow users to create products or service on-the-fly.

Error Handling and Exceptions

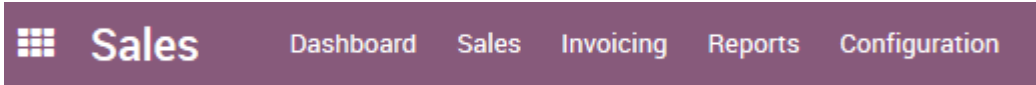
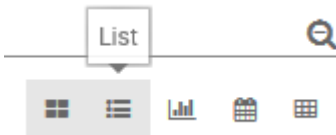



- FR-153: Odoo shall display an error message if required input field is missing from a new sales to invoice quotation.
- FR-154: Odoo shall display an error message if Customer field is missing from a new sales to invoice quotation.
- FR-155: Odoo shall display an error message if Invoice Address field is missing from a new sales to invoice quotation.
- FR-156: Odoo shall display an error message if Delivery Address field is missing from a new sales to invoice quotation.
- FR-157: Odoo shall display an error message if Price List input field is missing from a new sales to invoice quotation.
- FR-158: Odoo shall display an error message if Currency input field is missing from a new sales to invoice quotation.

Action Events

- FR-159: Odoo will omit any user changes made to a sales invoices when user cancels.
- FR-160: Odoo will lock a selected sales invoice from any user changes when sales invoice is locked.
- FR-161: Odoo shall reopen a sales invoice form and allow the user to edit order lines when user selects "Edit" button in the sale to invoice details page.

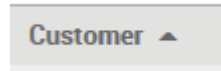
4.0 External Interface Requirements

4.1 User Interfaces

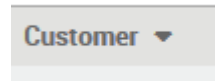
	
UI-1:	Odoo shall have a top navigation bar with with the following items: Dashboard, Sales, Invoicing, Reports, and Configuration.
UI-2:	Odoo shall use a fluid width on all pages to be compatible with different sized windows and screen resolutions.
	
UI-3:	Each graphical icon shall have alt text that explains what the icon represents.
UI-4:	The alt text shall be visible only when the user hovers over the graphical icon for 2 seconds.
	
UI-5:	Each button, link, and menu item shall either change background color or change text color to indicate the user has hovered over the button or link.
	
UI-6:	Certain buttons and links shall visually indicate when it is clicked on.
UI-7:	Each clickable link and field shall be green to indicate that the user can click on it.
UI-8:	A navigation menu shall remain open once a user has clicked a top level item.
	
UI-9:	The No Symbol (circle with a diagonal line through it running from top left to bottom right) shall be displayed when a navigation arrow cannot be clicked on.

— Total	1	1	17	20	2	1	42
+ November 2016	1	1	17	20	2	1	42

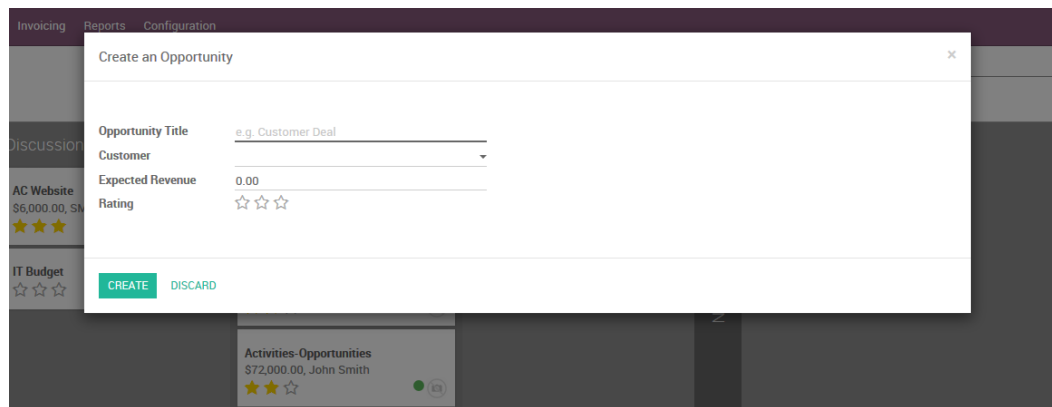
UI-10: The entire row shall be highlighted when a cell or row header is hovered over.



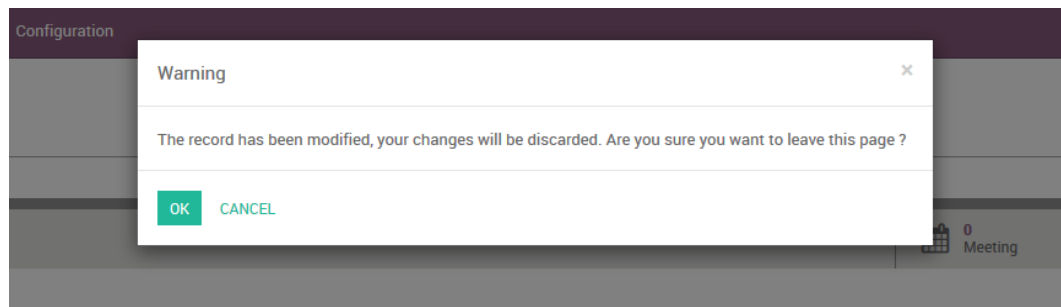
UI-11: An up arrow shall be displayed next to the column text when the column is sorted in ascending order.



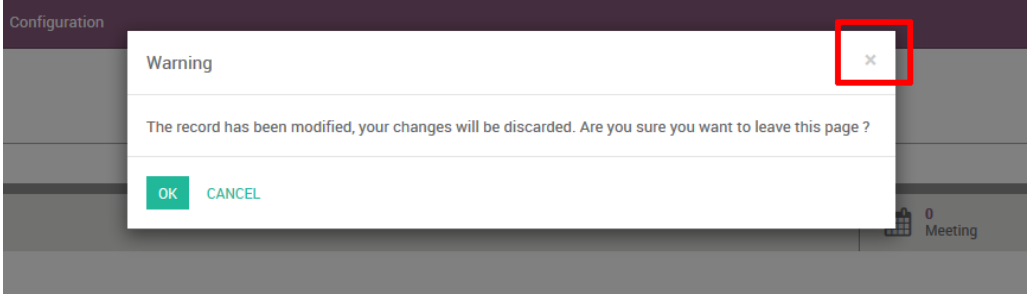
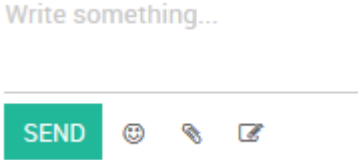
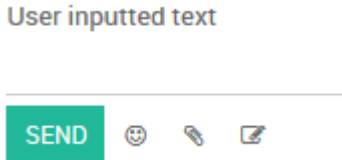
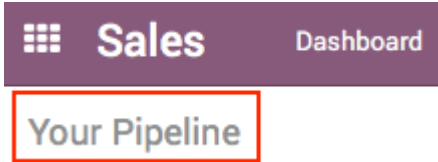
UI-12: A down arrow shall be displayed next to the column text when the column is sorted in descending order.

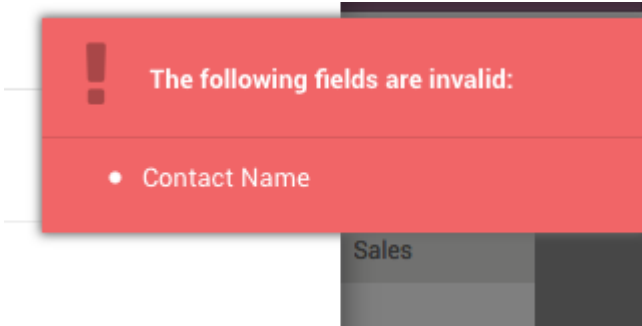

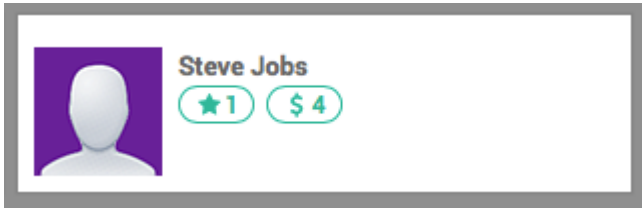
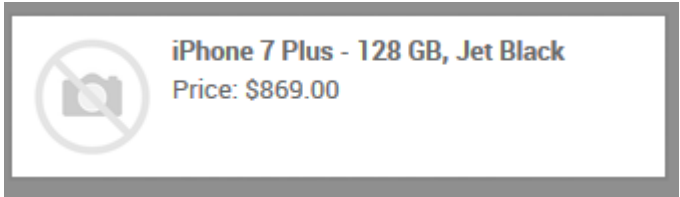


UI-13: Simple forms shall be displayed in a popup form inline.



UI-14: A modal dialog shall be displayed for warning messages.

	
UI-15:	An exit icon shall be displayed for inform popups.
	
UI-16:	Text indicators shall be displayed in the textbox when there is no text input.
	
UI-17:	Text indicators shall disappear in the textbox when there is text input.
UI-18:	Colors shall be reused throughout Odoo when possible.
UI-19:	Font sizes shall be reused for similar attributes throughout Odoo when possible.
UI-20:	Fonts shall be reused throughout Odoo when possible.
	
UI-21:	A bar containing the page title shall be displayed on each page.
UI-22:	A different color background shall be displayed for the current view.
UI-23:	Certain notes and messages shall be updated using ajax.

	<div> <div>Opportunity</div> <div>e.g. Product Pricing</div> </div>
UI-24:	Textfield error messages shall turn the text label red.
	
UI-25:	An error notification shall be displayed when a required field is empty.
	
UI-26:	Row background colors in list views shall be alternating.
	
UI-27:	A filler icon shall be displayed when there is no customer image.
	
UI-28:	A filler icon shall be displayed when there is no product image.

4.2 Hardware Interfaces

No external hardware interfaces have been identified.

4.3 Software Interfaces

Odoo supports exporting to a PDF and an Excel spreadsheet.

Some of the features presented in this document rely on the existence and maintained operation of APIs. The external software interfaces listed below contain no additional details since they fall outside of the scope of this release. We may reevaluate the option to develop these systems on our own as Odoo expands and requires custom features that cannot be accomplished using the existing solutions.

- Payments
 - The Sales application in Odoo requires a SIM & SMS based Mobile Money Service such as Safaricom M-PESA, Airtel Money, or MTN Mobile Money to integrate payment services.
- Inventory
 - Odoo leverages an inventory API in order to keep accurate inventory figures in the PostgreSQL database.

4.4 Communications Interfaces

- CI-1: Odoo shall have a network server to send emails to companies, customers, and contacts when a user requests to do so.
- CI-2: Odoo shall have a network server to send sales quotes, orders, and invoices via email to the associated contact when a user requests to do so.
- CI-3: Odoo shall have a database system that stores user accounts and settings.
- CI-4: Odoo shall have a database system that stores sales teams and targets.
- CI-5: Odoo shall have a database system that stores customers.
- CI-6: Odoo shall have a database system that stores products.
- CI-7: Odoo shall have a database system that stores activities.
- CI-8: Odoo shall have a database system that stores opportunities.
- CI-9: Odoo shall have a server to retrieve information from the database and calculate payments.

5.0 Other Nonfunctional Requirements

5.1 Performance Requirements

Odoo is designed to scale with company growth. Performance itself is impacted most by the hosting environment. A server with lower-end specifications will accommodate only a few users at a time; a server with higher-end specifications will accommodate far more users.

Optimal performance for both lower-end servers and higher-end servers is a priority for the Odoo development team. Each web page shall load within a reasonable amount of time, no more than 5 seconds per load.

Emails that are to be sent to users should be sent from the server within 10-15 minutes. There is no way to guarantee that the recipient email provider will receive the email within that timeframe. However, the email should be transmitted from Odoo's server within that 10-15 minute timeframe.

All edits, changes, and modifications should be confirmed and saved within 10 seconds of submission. For example, users should not have to wait in order to see a customer address update.

5.2 Safety Requirements

Odoo will not affect the data stored outside of its servers nor will it affect any other applications installed on the system. It cannot cause any damage to the user's system.

5.3 Security Requirements

Sensitive information may be stored in Odoo, such as customer contact information, related quotes, sales orders, invoices, and other information. Due to the nature of this information, users must first authenticate themselves prior to being able to access Odoo.

A user registration page is not to be included. Users who access Odoo must have an account created for them by an authorized Odoo user. This requirement is in place to prevent unauthorized users from registering accounts.

Odoo-hosted companies (companies that have elected Odoo to host their applications) shall have a separate set of security requirements that fall outside of the scope of this project. Odoo's hosting team shall maintain the security requirements for hosting.

5.4 Software Quality Attributes

Usability is kept in mind when designing the graphical user interface. Although Odoo is designed to be rich in features, it is a priority to ensure that information is presented in an attractive, organized, and responsive fashion.

Odoo is designed to be portable by being accessible through a web browser. Depending on how a company decides to host Odoo, it can be accessible from any location, transcending geographical and time zone restrictions. This web browser access also allows users to be flexible with their choice of

platform. Users are not restricted to a specific operating system, as long as it has a capable web browser.

Scalability is important as it is possible for some companies to underestimate the amount of resources necessary to meet their needs. Odoo allows companies to increase the number of servers and databases seamlessly. Companies are able to change up their system as their business needs evolve over time.

Odoo attempts to ensure correctness to the greatest possible extent by checking for required fields in forms. When a user attempts to save or discard a form without entering all of the required fields, Odoo will display an error and notify the user. However, not each field is required and not each required field is validated at this time for the benefit of flexibility. Companies can easily modify the fields required and add in validation to meet their needs.

5.5 Business Rules

Adaptability, availability, and flexibility are important software attributes for Odoo. Given that company sizes, organizational structure, and use cases for Odoo will vary, we felt that it would be most beneficial for companies to define business rules on their own. The software allows companies to create and upload their own templates.

Appendix A: Glossary

Word	Definition
Archive	Some item that is no longer considered active can be archived for record purposes. Any item that is archived can be returned to active status.
CRM	Customer relationship management systems manage a company's interactions with current and potential customers. It tracks communication and correspondence and automates sales, marketing, customer service, and support processes.
Customers	A customer is any contact, company, customer, lead, or opportunity within your Odoo database.
Dashboard	A dashboard is a central location that provides an overview or information from different fields on one screen.
Filters	Filters search results by keywords and references.
Group By	Users can group search results by customers, salesperson, order month and/or user defined custom groups.
Import	Files containing data can be imported in order to quickly create multiple entries within the application.
Internal Notes	A salesperson may add additional notes to a product, service or customer, which can be only view within the sales team
Kanban View	Kanban view is a visual workflow tool that displays records as "cards". These records can be grouped in columns or ungrouped.
Leads	A lead is a potential contact to reach out to to make them aware of your company (if not already) and to pursue for a sale.
List View	List view is a view that displays all elements in a row-by-row list.
Next Activities	Next activities are suggested succeeding actions for an opportunity based on the stage, created by a user or the system.
Opportunities	Leads who have shown interest in your company and products become opportunities that are handed off to a sales representative.

Order Line	Order lines specifies product purchases made by a customer which includes: product name, description, ordered quantity, unit price, sales taxes, and sub total.
Pipelines	Pipelines are a visual representation of a sales process, from first contact to final sale.
Products	Products are merchandise or services that are offered to customers.
Quotations	Sales quotations allows prospective customers to see the cost of what they would like.
Ratings	Ratings are assessments of opportunities based on a comparative assessment.
Reports	Reports are informational and presentable views of data that are generated.
Sales Cycles	Sales cycles are a sequence of phases used by a company to convert a lead into a customer.
Sales Orders	Sales orders are product or service orders issued to customers by a business.
Sales Stages	Sales stages are steps in the sales process that customers move through. They allow salespeople and managers to track progression.
Sales Teams	Sales teams are groups of salespeople who work closely together meet sales goals.
Salespeople	Salespeople are individuals who work for the company and assigned to specific opportunities.
Targets	Targets are goals defined by users. Some targets are for individual users, while others are for the sales team or organization.