

INSTALLATION MANUAL

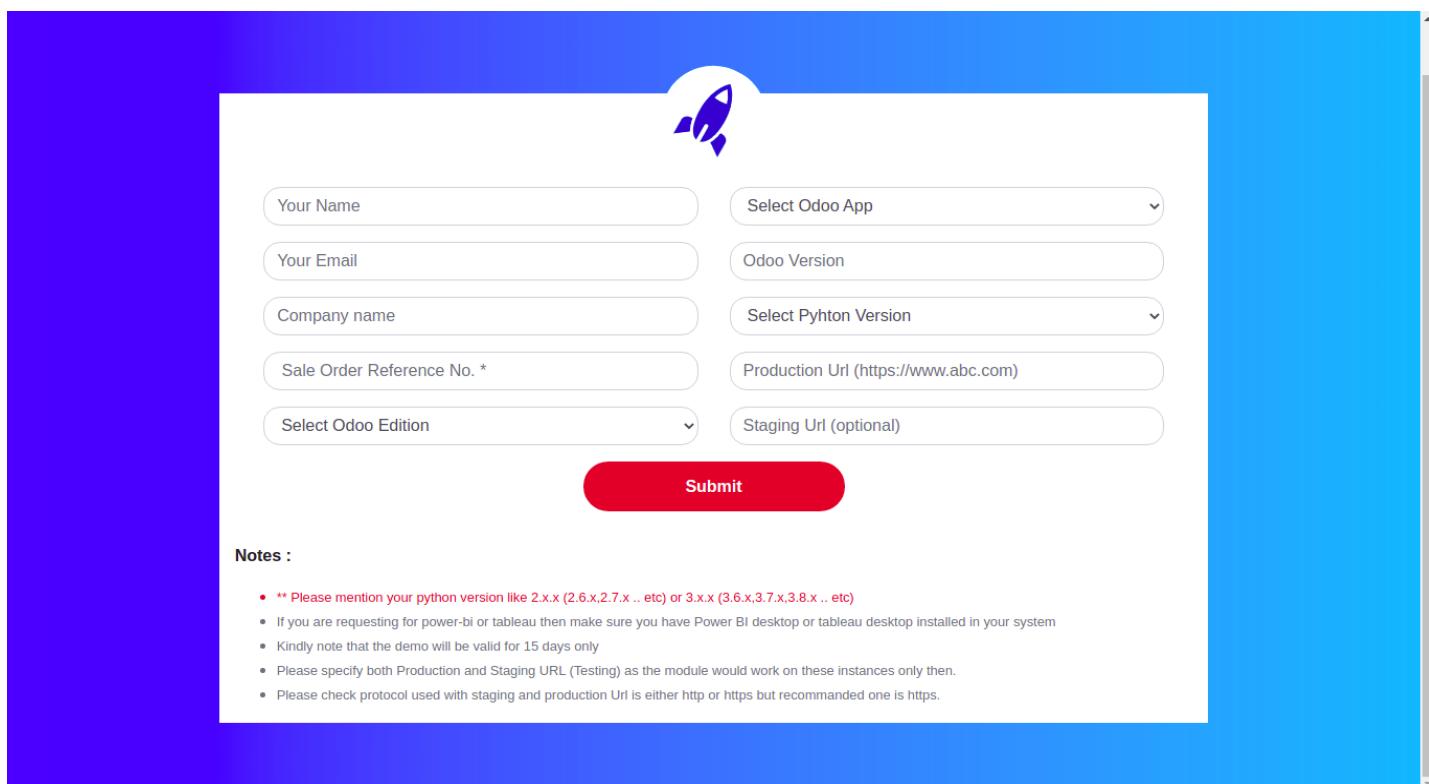
ODOO Power BI Connector

Before proceeding (**Important**) :

Please ensure that you have **PowerBI Desktop** installed on your Windows machine.

Requesting License Key :

Please visit following link : <https://odoo.techneith.com/request/>



The screenshot shows a web form titled "Request License Key". At the top center is a purple rocket ship icon. Below it are two rows of input fields. The first row contains "Your Name" and "Select Odoo App". The second row contains "Your Email" and "Odoo Version". The third row contains "Company name" and "Select Python Version". The fourth row contains "Sale Order Reference No. *" and "Production Url (https://www.abc.com)". The fifth row contains "Select Odoo Edition" and "Staging Url (optional)". A red "Submit" button is at the bottom. Below the form is a "Notes :" section with a bulleted list of instructions.

Notes :

- ** Please mention your python version like 2.x.x (2.6.x,2.7.x .. etc) or 3.x.x (3.6.x,3.7.x,3.8.x .. etc)
- If you are requesting for power-bi or tableau then make sure you have Power BI desktop or tableau desktop installed in your system
- Kindly note that the demo will be valid for 15 days only
- Please specify both Production and Staging URL (Testing) as the module would work on these instances only then.
- Please check protocol used with staging and production Url is either http or https but recommended one is https.

Fill the form. You will need following details :

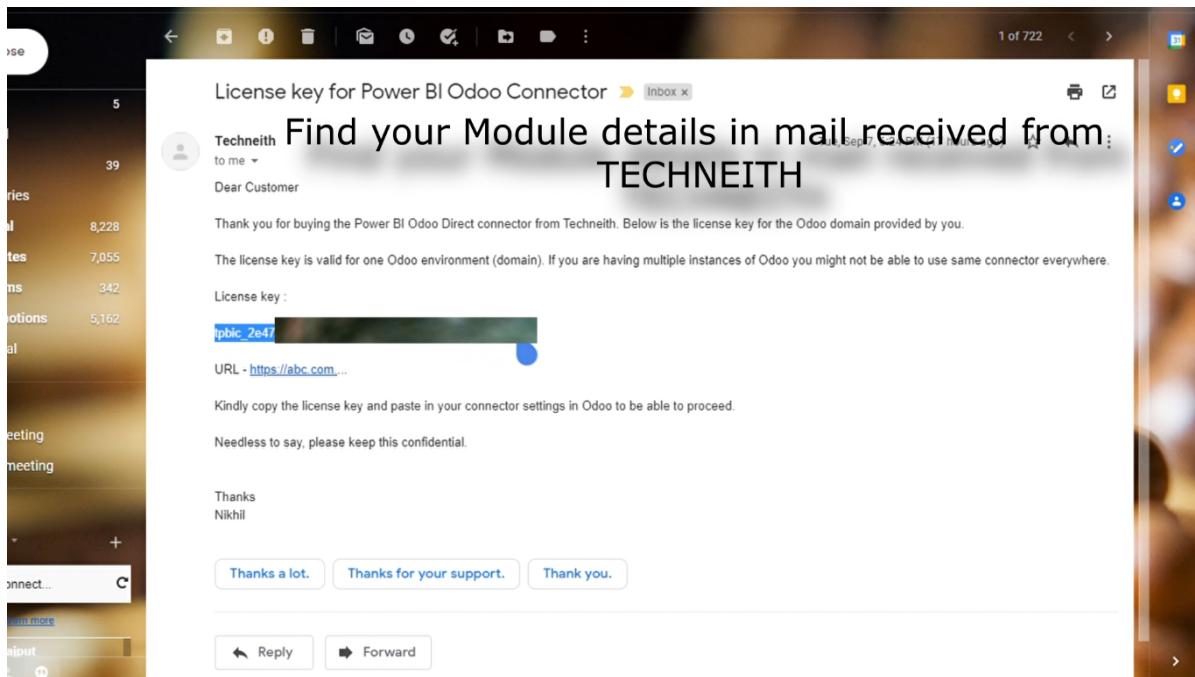
- Name
- Name of Organization
- Odoo Production and Staging URL
- Purchase/Invoice Number

On submitting the form successfully you will receive your license key on the e-mail you mentioned in the form within 48 hours.

STEP 1 : Module Verification

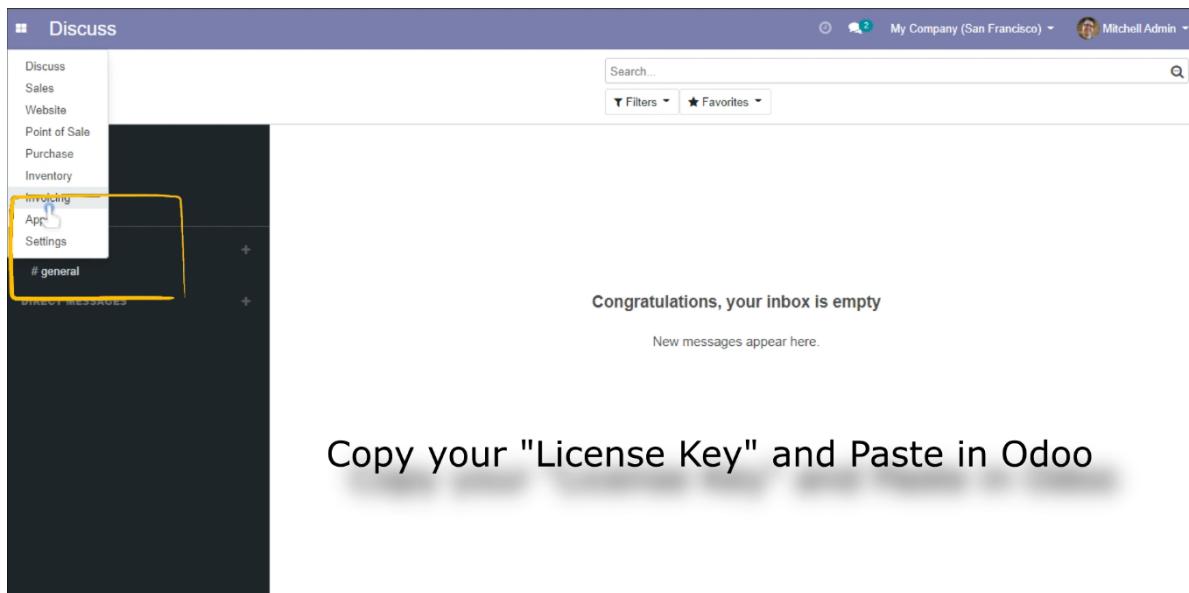
Install Module on your Odoo and follow below steps to verify your module

1.1 : Copy your License Key from email received from Techneith

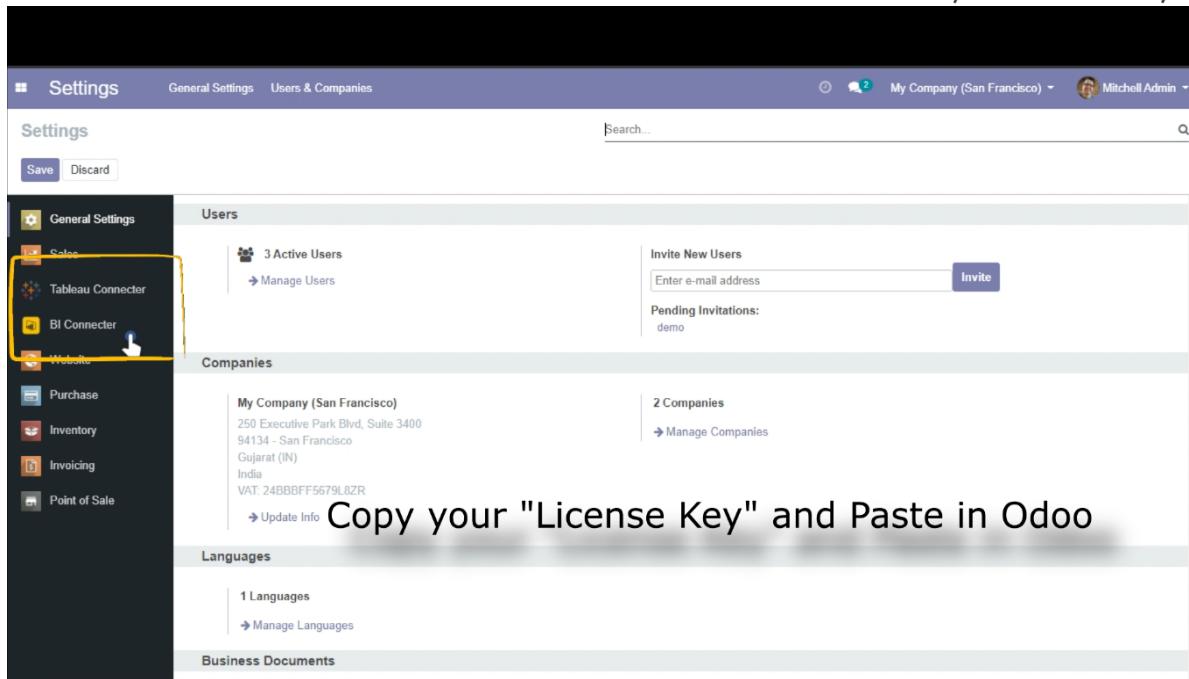


1.2 : Head to your OODOO and make sure you have installed the **PowerBI Connector Module.**

Once you have installed the module go to the **Settings page**.



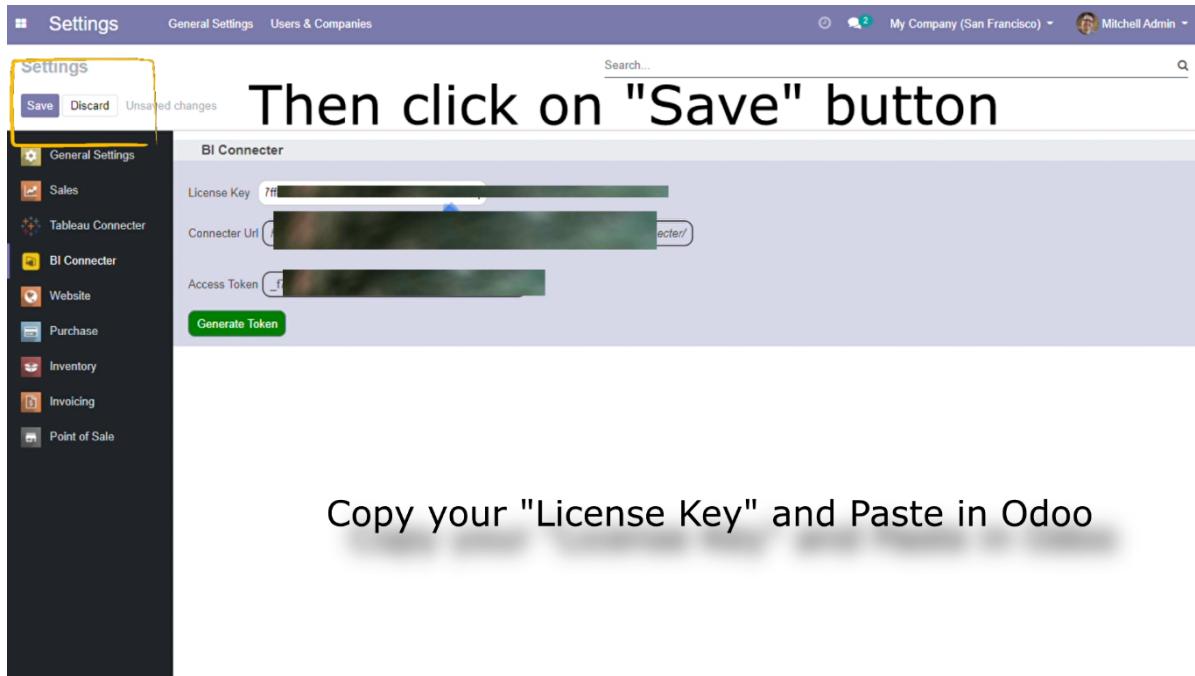
1.3 : Click Bi Connector on left panel (this will be available only after PowerBI Connector Module is installed on your OODOO)



1.4 : Paste your License Key in the License Key field (was copied in **Step 1.1**).

Then click **Save** and then **Generate Token**

(This generates your credentials to be used in PowerBI Desktop)



STEP 2 : Desktop Configuration

Use the below link to download the EXE file and run it on the Windows machine on which Power BI Desktop is installed.

Link :

<https://mega.nz/file/NvBUiRyR#8Q7-Kq7QyS8Hcpfuq7KsjwLpw5VFnpVACH0jKlZfHQ>

Run `powerbiconnector.exe` on your Windows machine.
(Right click on `powerbiconnector.exe` and click Run as Administrator)

This configures your PowerBI Desktop with Odoo Connector



Run "powerbiconnector.exe" you received with Module
This automatically configures Module on your System

After Running powerbiconnector.exe you can see feedback message and notification (as shown in below images)

This confirms our configuration is done successfully

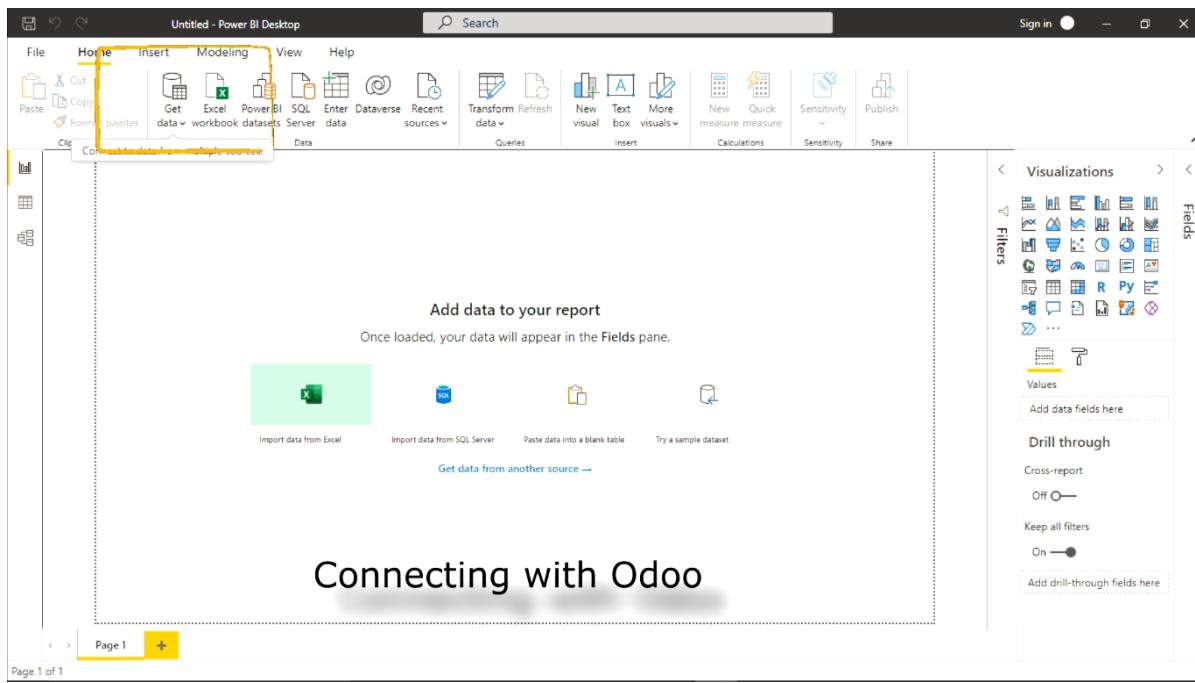
Run "powerbiconnector.exe" you received with Module
This automatically configures Module on your System

powerbiconnector.exe
Odoo PowerBI Connector
Techneth Odoo-PowerBI Connector is successfully configured.

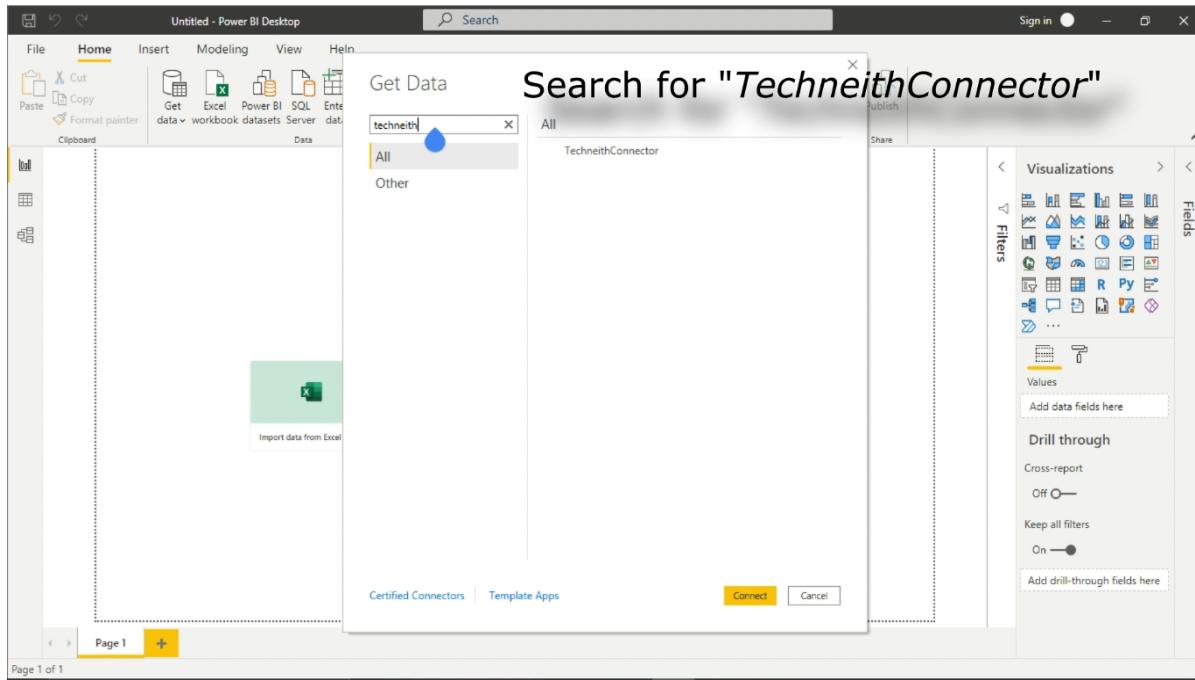
STEP 3 : Connecting with Odoo

Follow below steps to connect PowerBI with OODOO

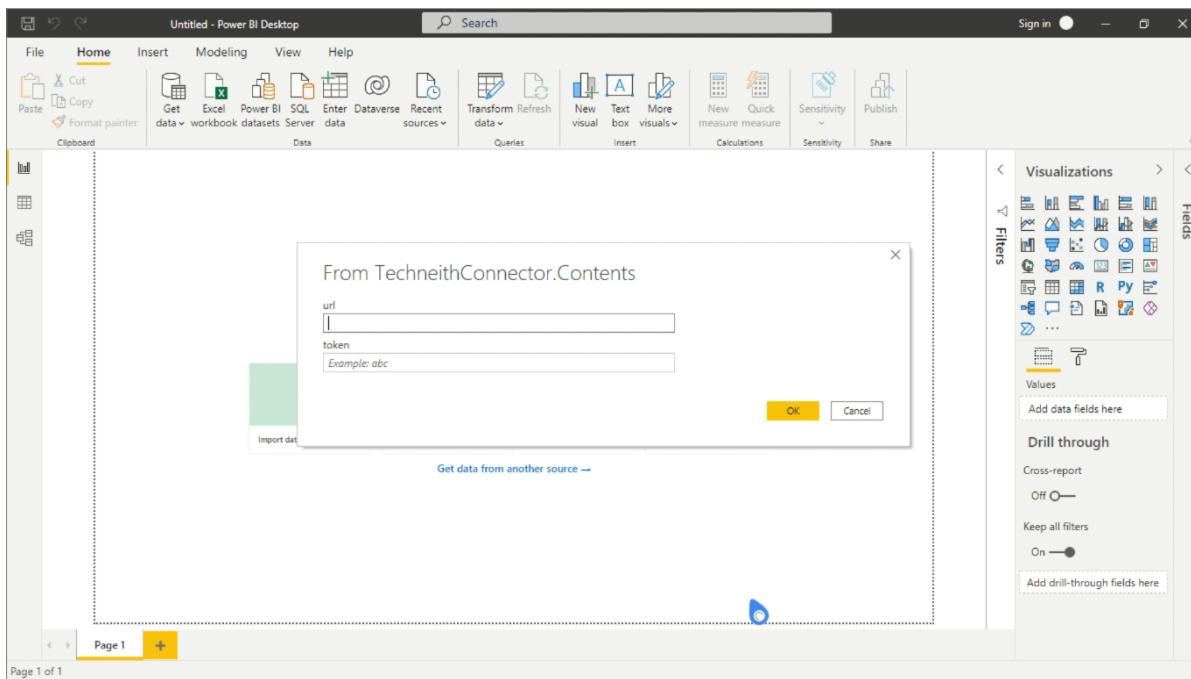
3.1 : Click **Get Data** on Home Tab in PowerBI Desktop



3.2 : Search for TechneithConnector in the Get Data window.
Then click Connect.



You will see the following screen.



We will fill these contents in **Step 4**

STEP 4 : Linking and Data Fetching

Follow below steps to link connector and fetch data

4.1 : Copy and Paste Connector Url and Access Token from ODOO (generated in step 1.4) to PowerBI Connector window (left in step 3.2)

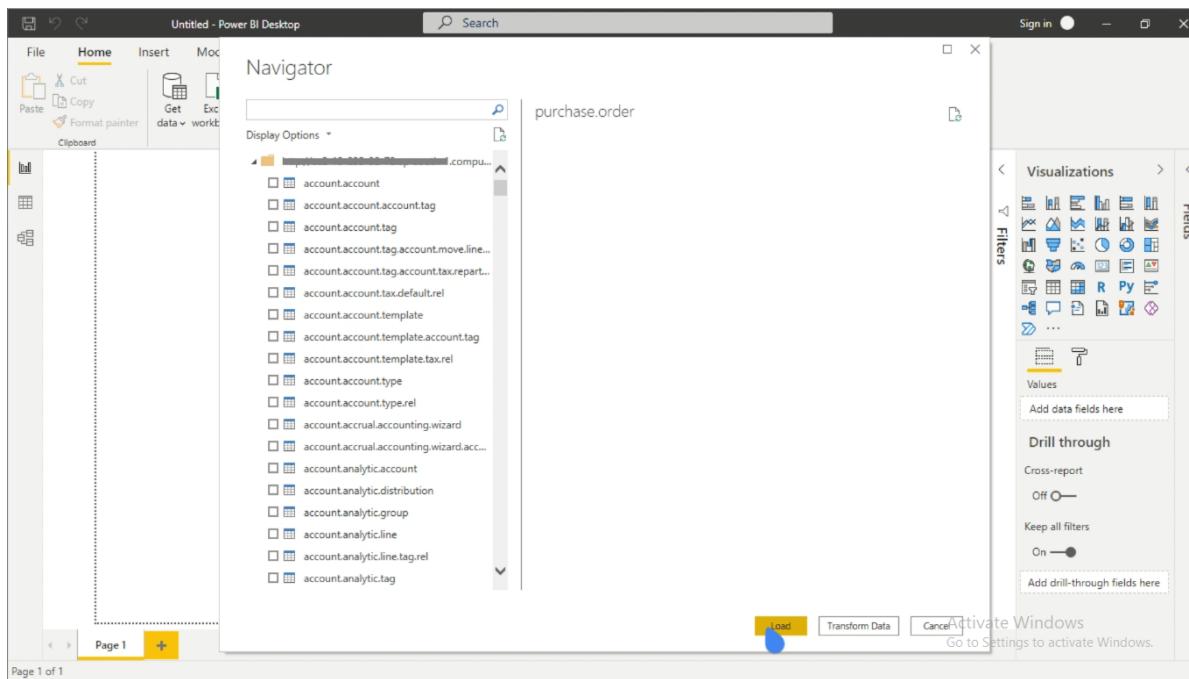
Copy from here and Paste Connector Credentials to PowerBI Desktop

Copy from here and Paste Connector Credentials to PowerBI Desktop

After step 4.1 click **OK**.

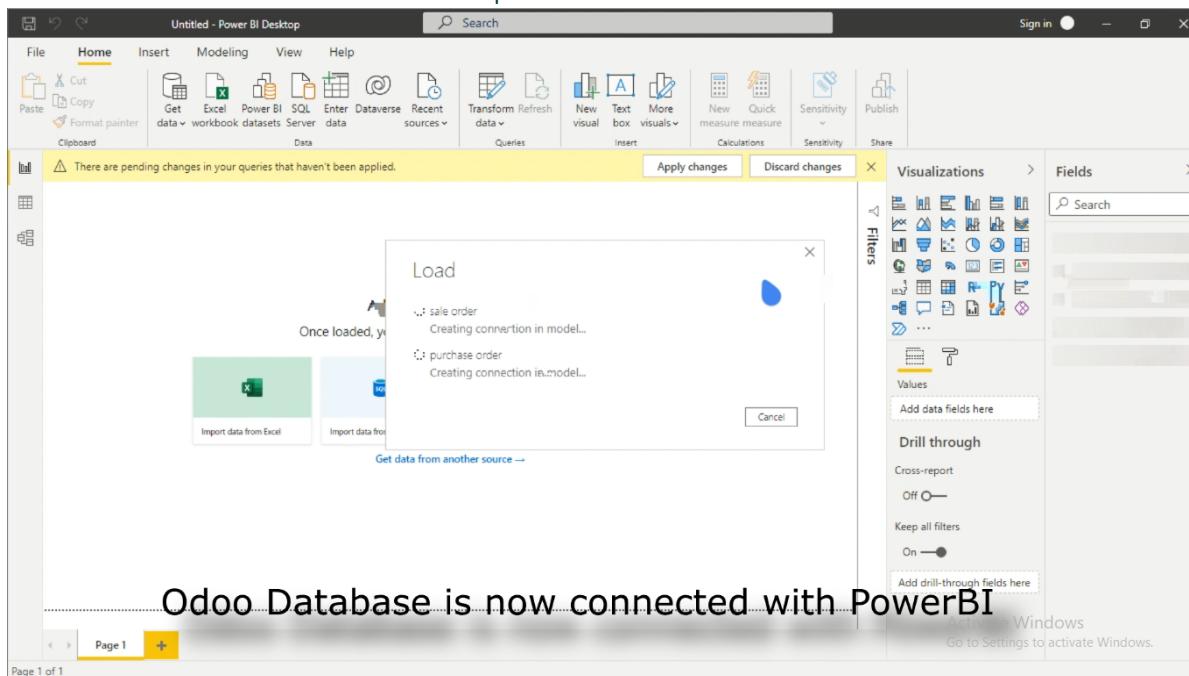
4.2 : You can see tables from your ODOO database.

Select tables you want to continue with in PowerBI and click Load.



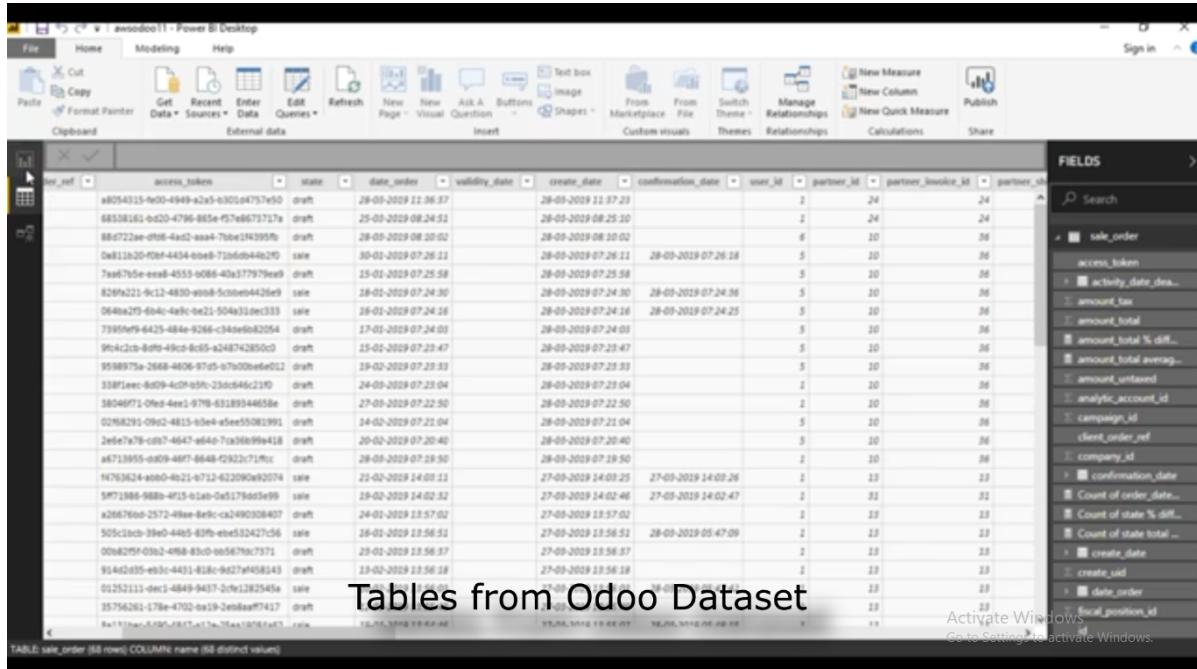
4.3 : Tables are being fetched and You can see loading as shown in the below image.

Note : Time to load data depends on the size of data to be fetched



Odoo Database is now connected with PowerBI

4.4 : Odoo Database is now connected successfully with PowerBI Desktop and you can see content of your tables



How to

Reflect Data change in PowerBI Desktop if there is change in data in ODOO

Click on the **Refresh** in Home tab.

(This loads and reflects the changes happened to data in ODOO)

powerbi - Power BI Desktop

File Home Help Table tools

Cut Copy Paste Get data Excel Power BI Data Source Refresh Transform New measure Manage roles View as Publish

Clipboard Data Calculations Security Share

Get the latest data by refreshing all visuals in this report.

Table: financials (700 rows)

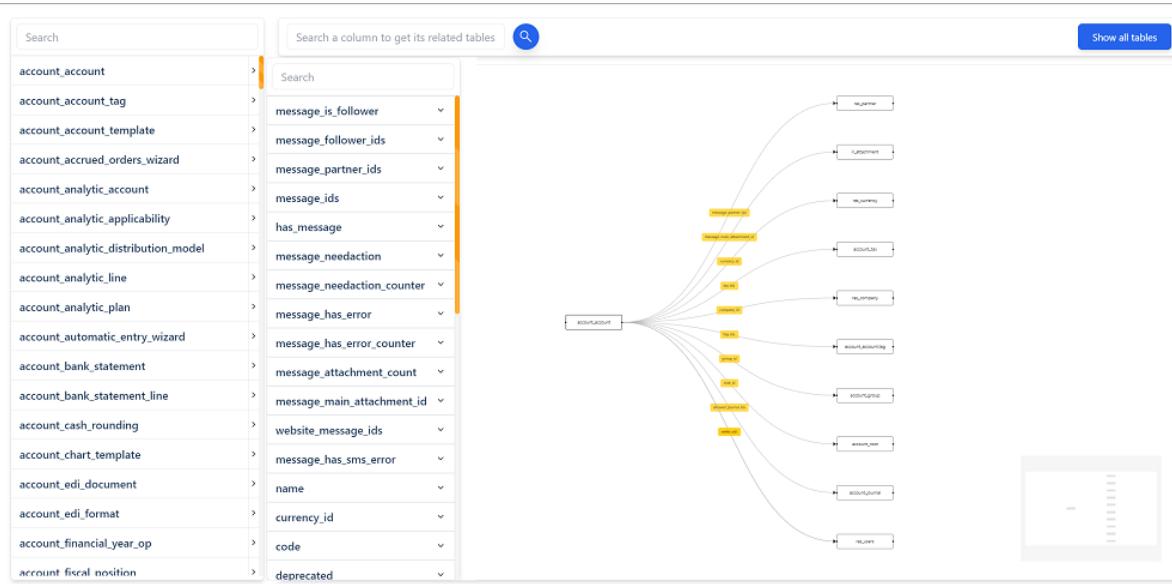
Fields

- financials
 - Sales
 - COGS
 - Country
 - Date
 - Discount Band
 - Discounts
 - Gross Sales
 - Manufacturing Price
 - Month Name
 - Month Number
 - Product
 - Profit
 - Segment
 - Sale Price
 - Units Sold
 - Year
- Sheet1
 - Sales
 - COGS

Check the Best Module for

Odoo Table Relationship Diagram

With Graphical View and Custom SQL Execution



To Know more about Odoo Data Model, visit:
<https://techneith.com/products/odoo-data-model/>

Note : If you are using this module on trial. Visit <https://techneith.com/> to make this module yours for lifetime. It is a one time price you pay on our website and enjoy for lifetime.

For any query contact info@techneith.com
