

USER MANUAL



Clever All In One Report Templates

Version: 2.3

Compatibility:

Odoo 12.x and 13.x

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Introduction

Odoo Clever All in One Report Templates is a perfect solution for you as it helps you to customize store reports based on your business requirements. With the help of Odoo All in One Report Templates app, you can effortlessly manage report creation in Odoo. Feel free to customize all the fields of your reports right from your company name to customer address!

Benefits of Clever All In One Report Templates

- It is an excellent app to manage multiple reports of Odoo store creatively. This app will help you maintain reports in a superior way. Admin can set layout of the reports in multiple ways.
- There are inbuilt 8 types of report configurations for the references. Admin can customize them the way they want.
- Admin can view Payment History in the invoice to keep a track of order details.
- Admin can set Text Colors, Company Details Colors and Product Description also in the Invoice. Admin can choose diverse colors with Color Picker.
- Admin will be able to manage templates of Invoices, Sales Orders, Purchase Orders and Request for Quotation, Delivery Notes and Item Pick up Notes.

Pre-requisites

Following points must be followed before starting the Plugin installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Clever All In One Report Templates.
- For Report layout, header and footer are preferable in this wkhtmltopdf 0.12.1 (with patched qt) or wkhtmltopdf 0.12.5 (with patched qt) version.
- You need to install img2pdf, num2words and fpdf.

Installation

Installation Steps

Step 1: Download and extract the zip file.

Step 2: Check your Odoo add-ons path.

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

Step 3: Open Terminal and go to the download location

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

Step 4: Copy download modules to addons path

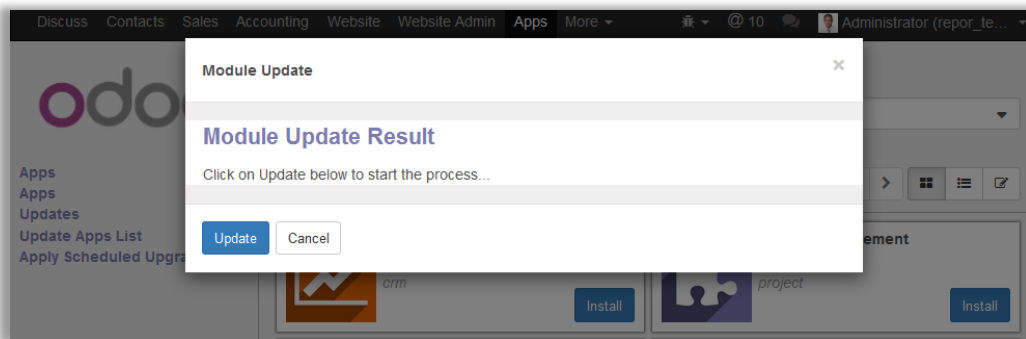
- Give the below mentioned commands to perform copy operation:
 - `$cd /home/odoo/Downloads/general_template`
 - `$cd v8`
 - `$sudocp general_template/opt/odoo/addons`

Step 5: Restart Odoo server.

Step 6: Login with the admin credentials in your Odoo instance.

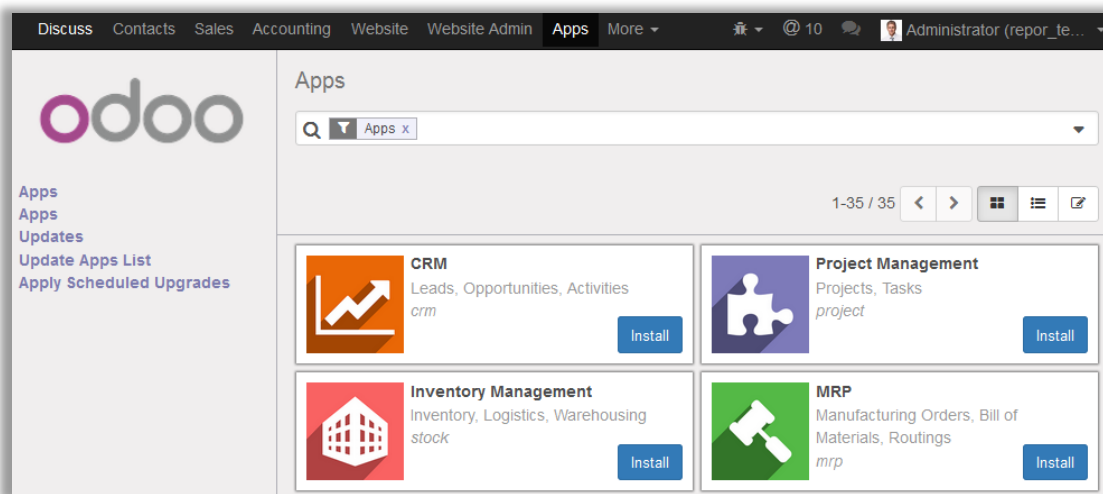
Step 7: Go to the Apps/Update Apps List.

- Click on 'Update' button.

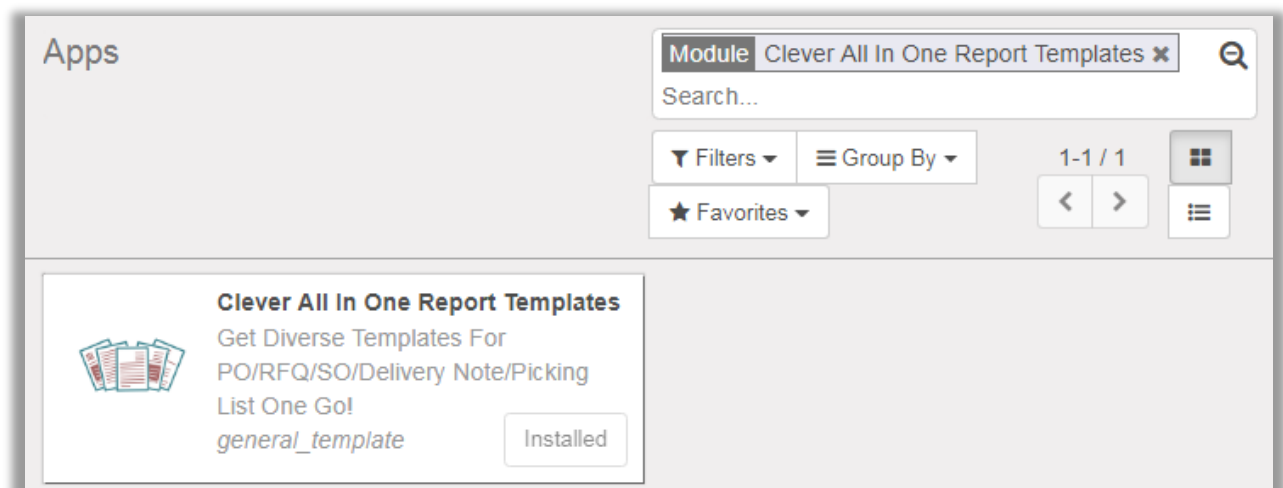


Step 8: Go to Apps

- Remove 'Apps' search filter.



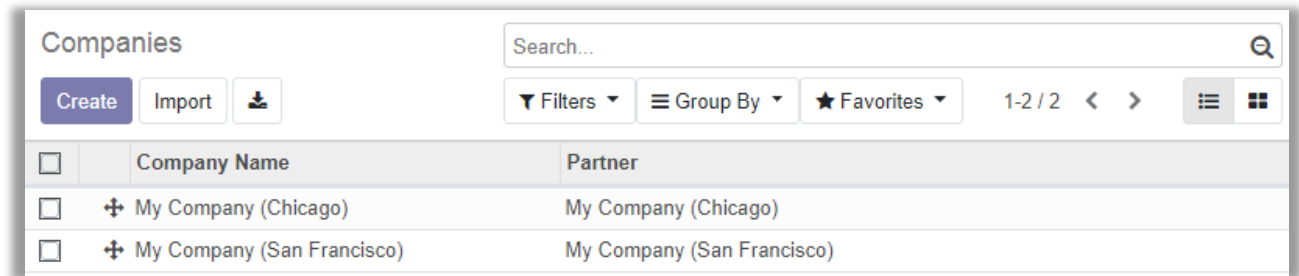
- Enter the module name in the search box provided in the top right corner of the page. For e.g. here write "Clever All In One Report Templates".
- Click on 'Install' button.



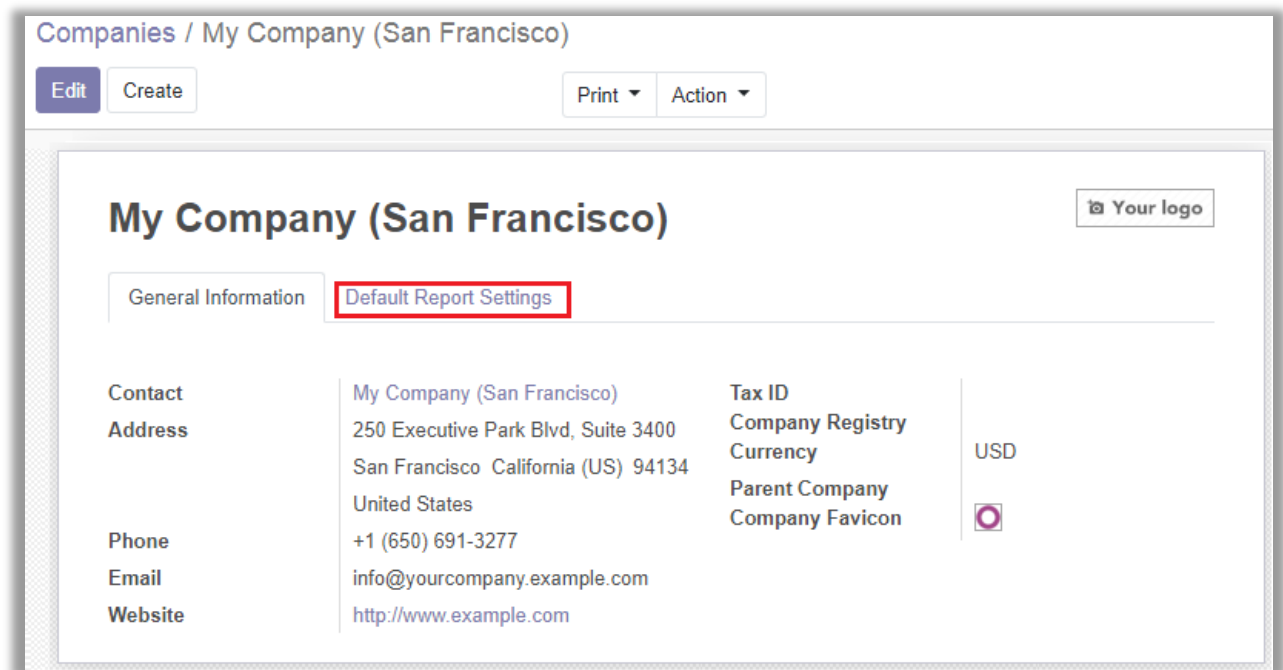
App Configuration

Configuring 'Default Report Templates'

- You can set the Report Templates for the Companies.
- Go to **Settings -> User & Companies** (on header) -> **Companies**



- Select your company and click on the **'Default Report Settings'** tab.




- Now click on **'Edit'** button to edit the template and Report.

Set 'Default Template Settings'







Companies / My Company (San Francisco)



Save Discard

Company Name
My Company (San Francisco) 


General Information Default Report Settings


Default Template Settings

Quotation/Order Template	Contemporary 	Invoice Template	Contemporary 
Purchase Order Template	Contemporary 	Delivery Note Template	Contemporary 
RFQ Template	Contemporary 	Picking List Template	Contemporary 

 Preview Template  Report Extra Content


Default Report Settings


Report Logo 

Standard Template Configuration Innovative 

Watermark

Display Watermark Report Watermark Logo

Logo 



- Choose the default template for each of the following reports:
 - **Quotation/Order Template:** Choose the default template for 'Quotation/Order Report'.
 - **Purchase Order Template:** Choose the default template for 'Purchase Order Report'.
 - **RFQ Template:** Choose the default template for 'RFQ Report'.
 - **Invoice Template:** Choose the default template for 'Invoice Report'.
 - **Delivery Note Template:** Choose the default template for 'Delivery Note Report'.
 - **Picking List Template:** Choose the default template for 'Picking List Report'.
- **Preview Template:** Template preview will be shown on the basis of chosen **Standard Template Configuration** which is given under the "Default Report Settings" section.
- **Report Extra Content:** Set the customized content like Terms & Condition, Product brochure, Manuals, any kind of promotional content etc. by attaching the PDF, Image or Doc. File with no limit on No. of pages.

Extra Content Configuration

Default Template Settings

Quotation/Order Template	Contemporary		Invoice Template	Contemporary	
Purchase Order Template	Contemporary		Delivery Note Template	Contemporary	
RFQ Template	Contemporary		Picking List Template	Contemporary	

Preview Template

[Report Extra Content](#)

- By clicking on **Report Extra Content** text, you will get the list of Report Extra Content.

Companies / My Company (San Francisco) / Report Extra Content

[Create](#) [Import](#)

<input type="checkbox"/>	Model	File name
<input type="checkbox"/>	Transfer	Copyright-Transfer-Agreement .pdf

- You can edit the existing or create a new one.

Companies / My Company (San Francisco) / Report Extra Content / New

[Save](#) [Discard](#)

Model	<div>▼</div> <div>Journal Entries</div> <div>Purchase Order</div> <div>Sales Order</div> <div>Transfer</div>	Append Extra Content		Upload your file
Company				

- You must select the **Model** for which you want to add extra content within it.

Companies / My Company (San Francisco) / Report Extra Content / New

[Save](#) [Discard](#)

Model	Sales Order	Append Extra Content	Sales Order-Agreement.pdf		
Company	My Company (San Francisco)				

- Select the 'Company' and 'Append' the Extra Content like PDF, Doc., Image etc.
- As per above configuration, the attached content will be shown along with the Sales order.

Default Report Settings (Content Related)

- To set the Default Report Settings navigate to **‘Default Report Settings’** section to manage following options:
 - **Standard Template Configuration:** Choose the default template for all the Reports from following **8 options**:
 - Advanced
 - Exclusive
 - Contemporary
 - Incredible
 - Creative
 - Innovative
 - Elegant
 - Professional

Default Report Settings

Report Logo

Standard Template Configuration: Contemporary

Company Name: #6F8192

Company Address: #6F8192

Display Company Name in Bold: ☒

Display Bank Details: ☒

Banks: BE68539007547034

Watermark

Display Watermark: ☐

Report Watermark Logo

Customer Name: [Redacted]

Customer Address: [Redacted]

Display Customer Name in Bold: ☒

- **Report Logo:** Set the Report Logo for the reports.
- **Standard Template Configuration:**

Company Name: #6F8192

Color: [Color Picker]

Company Address: [Redacted]

Display Company Name in Bold: ☒

Display Bank Details: ☒

Banks: [Redacted]

- The Color Picker tool is given to choose any color for the editable text fields.

Watermark

- You can set the Logo, Text or Status as **Watermark** in the Report.
- If you select the Text, insert the Watermark Text. You can format its color and font size.

Watermark

Display Watermark

Report Watermark

Logo

Logo
 Logo
Text
 Status

Watermark

Display Watermark

Watermark Text

Watermark Text Color

Watermark Text Font Size(em)

Text
 WatermarkText
 #a24689
 9

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

Default Report Settings

Report Logo



Standard Template Configuration


Contemporary

Watermark

Display Watermark

Report Watermark

Logo



<p>Company Name Color</p> <div style="border: 1px solid #ccc; padding: 2px;">#6F8192</div> <p>Company Address Color</p> <div style="border: 1px solid #ccc; padding: 2px;">#6F8192</div> <p>Display Company Name in Bold</p> <input checked="" type="checkbox"/> <p>Display Bank Details</p> <input checked="" type="checkbox"/> <p>Banks</p> <div style="border: 1px solid #ccc; padding: 2px;">BE68539007547034</div>	<p>Customer Name Color</p> <div style="background-color: black; height: 15px; width: 100%;"></div> <p>Customer Address Color</p> <div style="background-color: black; height: 15px; width: 100%;"></div> <p>Display Customer Name in Bold</p> <input checked="" type="checkbox"/>
---	---

Left side options: (Settings for displaying Company's details)

- You can set the 'text color' for **Company Name** and **Company Address**.
- If you want to display the 'Company Name' in bold format, tick the check box.
- If you want to display the **Bank details**, tick the **Display Bank Details** option. After ticking this option, the drop-down option named **Banks** will be enabled to let you select the Bank details like Account No.

Right side options: (Settings for displaying Customer's details)

- You can set the 'text color' for **Customer Name** and **Customer Address**.
- If you want to display the 'Customer Name' in bold format, tick the check box.

Template Base Color	#a24689	Display Product Description	<input checked="" type="checkbox"/>
Template Text Color	#FFFFFF	Display Product Image	<input checked="" type="checkbox"/>
General Text Color		Display Amount In Word	<input checked="" type="checkbox"/>
Table Odd Parity Color	#FFFFFF	Display Notes	<input checked="" type="checkbox"/>
Table Even Parity Color	#e6e8ed	Display Payment Notes	<input checked="" type="checkbox"/>
		Display Payment Description	<input checked="" type="checkbox"/>
		Display Report Barcode	<input checked="" type="checkbox"/>

Left side options: (Settings for displaying the details of Template & Table content)

- **Template Base Color:** Set the Template Base Color for the reports.
- **Template Text Color:** Set the Template Text Color for the reports.
- **General Text Color:** Set the General Text Color for the reports.
- **Table Odd Parity Color:** Set Table Odd Parity Color for the reports.
- **Table Even Parity Color:** Set Table Even Parity Color for the reports.

Right side options:

- You can enable the following options to display on the reports:
 - **Display Product Description:** Enable this option to display product description.
 - **Display Product Image:** Enable this option to show the product images.
 - **Display Amount in Words:** Enable this option to display the Bill Amount in the words.
 - **Display Notes:** Enable this option to display the Note in the reports.
 - **Display Payment Notes:** Enable this option to display the Payment related notes.
 - **Display Payment Description:** Enable this option to display Payment related any description.
 - **Display Report Barcode:** Enable this option to display Barcode in the reports.

Report Font & Footer

Report font

Report Font Helvetica ▼

Report Font Size(px) 12

Report Footer

Select Report Footer Standard ▼

Standard

Multi Columns Footer


- Select the required the **Report Font** and **Font Size**.
- Select the Footer for Report. 'Clever All In One Report Templates' app provides you with a **Multi Columns Footer**.

Signature

Signature

Display Signature ☒


Signature



- If you want to display unique signature, tick the checkbox of **Display Signature** and choose the **logo** or any **icon** of the signature.

Preview Template

Company Name



My Company (San Francisco)

General Information

Default Report Settings

Default Template Settings


Quotation/Order Template	Contemporary ▼	✎	Invoice Template	Advanced ▼	✎
Purchase Order Template	Elegant ▼	✎	Delivery Note Template	Creative ▼	✎
RFQ Template	Elegant ▼	✎	Picking List Template	Incredible ▼	✎

Preview Template

☒ Report Extra Content

Default Report Settings


Report Logo



Standard Template Configuration Contemporary ▼


Watermark

Display Watermark Logo ▼

Report Watermark Logo 

- If you want to Preview the Template, click on **Preview Template** text.

- The Template preview will be shown on the basis of chosen **Standard Template Configuration**.



BIZTECH IT CONSULTANCY PVT. LTD.
C/801, Dev Aurum Commercial,
Prahald Nagar, Gujarat, India.
Mobile: +91-987-962-2024
Email: Sales@Biztechconsultancy.Com

Invoice To:
Biztech IT Consultancy Pvt. Ltd.
C/801, Dev Aurum Commercial,
Prahald Nagar, Gujarat, India.
Mobile: +91-987-962-2024
Email: Sales@Biztechconsultancy.Com

Invoice No:	123456789135
Invoice Date:	15 March, 2016
PO:	SO/124/4567
Order Date:	10 March, 2016
Due Date:	20 March, 2016


Sr.	Description	Quantity	Unit Price	Taxes	Price
1	Mackbook Pro	1	900.00		900.00
2	Apple Mobile	2	500.00	5.00%	1000.00
Sub Total					1900.00
Taxes					50.00
TOTAL					1950.00

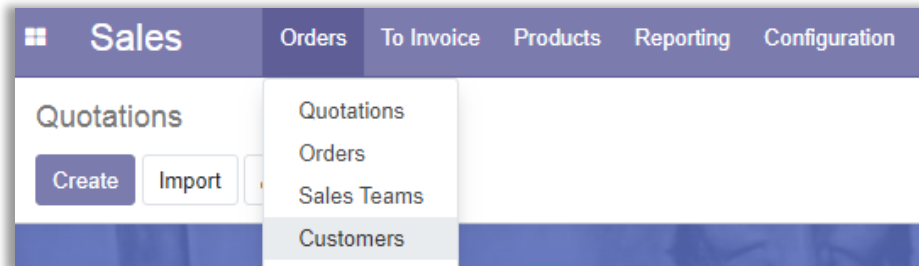
Payment History

Sr.	Date	Method	Ref.	Amount
1	01 February, 2016	Online Bank Transfer	4569896347	1500.00

- PAYMENT TERM:**30 DAYS
- COMMENT:**WE ARE A HIGHLY QUALIFIED TEAM OF WELL-ROUNDED SOFTWARE
- FISCAL POSITION REMARK:**20% VAT APPLIES TO ALL ELECTRONIC DEVICES

Set Default Report Template for Customers

- You can also set the Default Report Templates for the Customers.
- For that, go to **Menu icon**  -> **Sales -> Orders -> Customers**.



- Click on the **Customers**.
- Select the customer and then click on **'Edit'** to set the default template for the selected customer.

☐ Individual ☒ Company

Azure Interior

Company Address: 4557 De Silva St
Street 2...
Fremont California (US) 94538
United States
Tax ID: e.g. BE0477472701

Phone: (870)-931-0505
Mobile:
Email: azure.Interior24@example.com
Website Link: http://www.azure-interior.com
Language: English (US)
Tags: Services x Tags...


Contacts & Addresses Sales & Purchase **Report Configuration** Invoicing Internal Notes

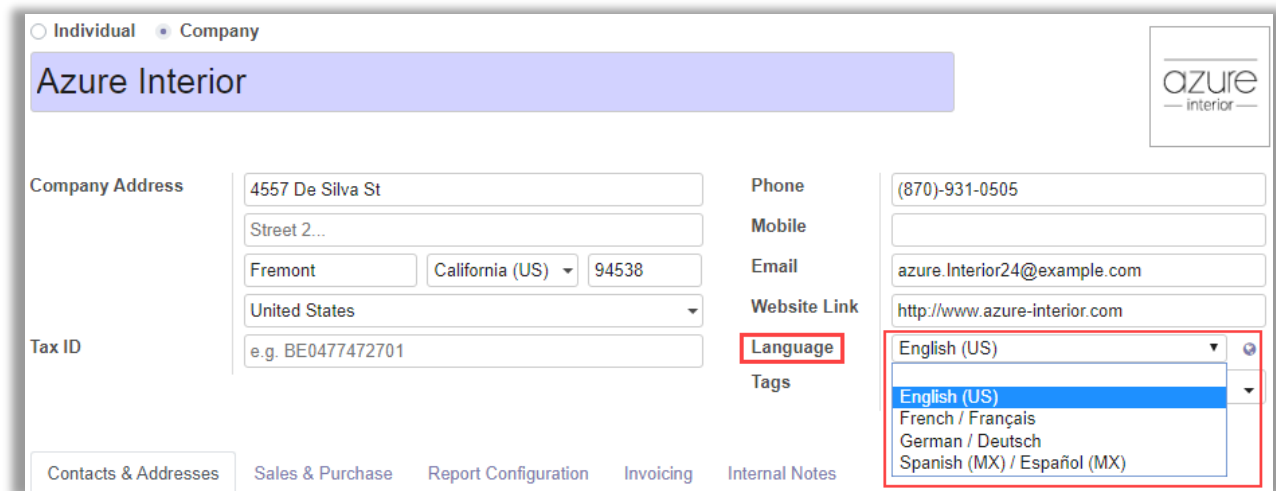
Default Report Settings

Invoice Template	Advanced	Purchase Order Template	Elegant
Sale Order Template	Innovative	RFQ Template	Contemporary
Delivery Note Template	Exclusive	Picking List Template	Innovative

- Click on the **'Report Configuration'** tab and choose the templates for the following reports:
 - Invoice
 - Purchase Order
 - Sales Order
 - RFQ Template
 - Delivery Note
 - Picking List
- Select the **'Default Template'** as per your requirement and save the changes.

Configure Language for Report

- Click on **Menu icon**  -> **Sales -> Customers**.
- Now select the customer for which you want to set specific **language** and click on **'Edit'** to set the required language from 'Language' dropdown list.



Individual ☐ Company ☒

Azure Interior

Company Address: 4557 De Silva St
Street 2...
Fremont California (US) 94538
United States
Tax ID: e.g. BE0477472701

Phone: (870)-931-0505
Mobile:
Email: azure.Interior24@example.com
Website Link: http://www.azure-interior.com

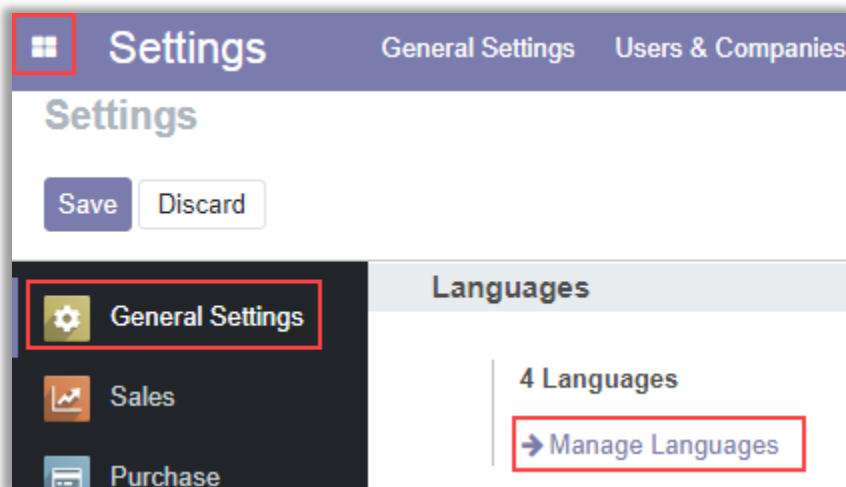
Language: English (US)
English (US)
French / Français
German / Deutsch
Spanish (MX) / Español (MX)

Tags

Contacts & Addresses Sales & Purchase Report Configuration Invoicing Internal Notes

- By using this Language selection, you can display the amount in words in the language which is selected here.


Note: You can set the language from the **Menu icon**  -> **Settings -> Manage Languages**.



- Click on the **Manage Languages** to choose the language and load the chosen language. Save the changes.

Printing the Reports

Printing option for the Sales Orders

- Go to **Menu**  icon **Sales -> Sales Orders**.
- Select any Sales Order from the list of Sales Orders that is to be printed.
- Click on **Print -> Quotation / Order** to print the Sales Order.

Sales Orders / S00015

[Edit](#) [Create](#)

[Create Invoice](#) [Send by Email](#) [Cancel](#)

[Print](#) [Action](#)

[Quotation / Order](#)

[Customer Preview](#)

S00015

Customer Gemini Furniture
317 Fairchild Dr
Fairfield CA 94535
United States

Sale Order Template
Order Date 12/21/2019 13:26:03
Payment Terms

Quotation Template

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

Product	Description	Quantity	Delivered	Invoiced	Unit Price	Taxes	Subtotal
[FURN_6666] Acoustic Bloc Screens	[FURN_6666] Acoustic Bloc Screens	3.000	0.000	0.000	2,750.00		8,250.00 €
[FURN_0269] Office Chair Black	[FURN_0269] Office Chair Black	3.000	0.000	0.000	12.50		37.50 €















[Add shipping](#)


Untaxed Amount: \$ 8,287.50
Taxes: \$ 0.00
Total: \$ 8,287.50

- By clicking on **Quotation / Order**, you can print out *or* download the PDF of the Sales Order.

Printing Sales Orders - PDF

- By clicking on the Print icon, you can print the PDF of Sales Order.



My Company (San Francisco)
 250 Executive Park Blvd, Suite 3400
 San Francisco, California, 94134, United States
 Email: info@yourcompany.example.com
 Bank: BE68539007547034

Invoicing And Shipping Address:

Gemini Furniture, Oscar Morgan
 317 Fairchild Dr
 Fairfield, California, 94535, United States
 Email: oscar.morgan11@example.com



Order # S00015

Date Ordered: 12/21/2019 08:56:03

Your Reference:

Salesperson: Marc Demo





Payment Term:

Sr.	Image	Description	Quantity	Unit Price	Taxes	Price
1		[FURN_6666] Acoustic Bloc Screens	3.000	2,750.00		8,250.00 €
2		[FURN_0269] Office Chair Black	3.000	12.50		37.50 €

Subtotal \$ 8,287.50

Total \$ 8,287.50

Total in word:- Eight Thousand, Two Hundred And Eighty-Seven Point Five

My Company (San Francisco)
 250 Executive Park Blvd, Suite 3400
 San Francisco, California, 94134, United States

+1 (650) 691-3277
<http://www.example.com>
info@yourcompany.example.com

Printing Sales Orders with Extra Content - PDF

- If the **extra content** like Terms & Conditions, Notes etc. is added with the selection of 'Sales Order' as **Model** during the Template Settings, the content will be attached with Sales Orders PDF.

Default Template Settings

Quotation/Order Template	Contemporary		Invoice Template	Contemporary	
Purchase Order Template	Contemporary		Delivery Note Template	Contemporary	
RFQ Template	Contemporary		Picking List Template	Contemporary	


[Preview Template](#) [Report Extra Content](#)

Companies / My Company (San Francisco) / Report Extra Content / New

[Save](#) [Discard](#)

Model	<div> <div></div> <div>Journal Entries</div> <div>Purchase Order</div> <div>Sales Order</div> <div>Transfer</div> </div>	Append Extra Content	Upload your file
Company			

- The extra content file will be attached with the Sales Order.

<p>My Company (San Francisco) 250 Executive Park Blvd, Suite 3400 San Francisco, California, 94134, United States</p>	<p>+1 (650) 691-3277 http://www.example.com info@yourcompany.example.com</p>	
--	---	---

Copyright Transfer Agreement: Example of CTA

This is an example of the Copyright Transfer Agreement (CTA) that you will be asked to complete if your paper is accepted for publication. This document is for your information only – please **do NOT** complete this version of the form. If your paper is accepted you will receive further instructions about how to complete the form.

[JOURNAL NAME]

Published by Wiley on behalf of _____ (the "Owner")

or

Published by Wiley (the "Owner")

or

Published by Wiley and _____ (together the "Owner")

- Similarly, you can configure the extra content for Journal Entries, Purchase Orders and the Transfer Details.

Printing Inventory

- To print the details of the Inventory, you can print the **Picking Operation** and **Delivery Slip**.

Inventory Overview / YourCompany: Receipts / WH/IN/00004

Edit Create

Print Action

1 / 2 < >

Validate Print Unlock Cancel

Draft Waiting Ready Done





WH/IN/00004

Receive From | Wood Corner
Operation Type | YourCompany: Receipts

Scheduled Date | 12/21/2019 13:30:01
Source Document
Picking Template

Operations Additional Info Note

Product	Demand	Done	
[E-COM11] Cabinet with Doors	120.000	0.000	

- Similarly, you can print out for the following Reports:
 - Sales Quotations (Menu icon  -> Sales -> Orders -> Quotations)
 - Request for Quotation (Menu icon  -> Purchase -> Orders -> Request for Quotation)
 - Purchase Orders (Menu icon  -> Purchase -> Orders -> Purchase Orders)
 - Invoices (Menu icon  -> Invoicing)

Contact Us

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



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-all-in-one-report-templates.htm> and click on the Live Chat button for instant support.



Tickets

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

Customization:

If you would like to customize or discuss about additional features for **Odoo Clever All in One Report Templates App**, please write to sales@appjetty.com