appjetty

USER MANUAL

CLEVER ALL IN ONE REPORT TEMPLATES

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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

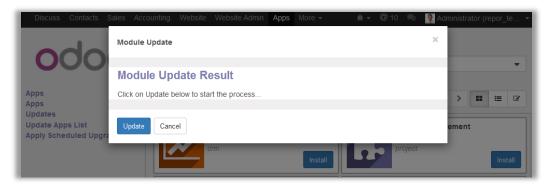**Step 4: Copy download modules to addons path**

- 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.

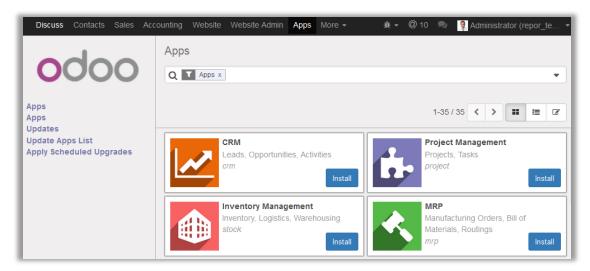**Step 6: Login with the admin credentials in your Odoo instance.**

Step 7: Go to the Apps/Update Apps List.
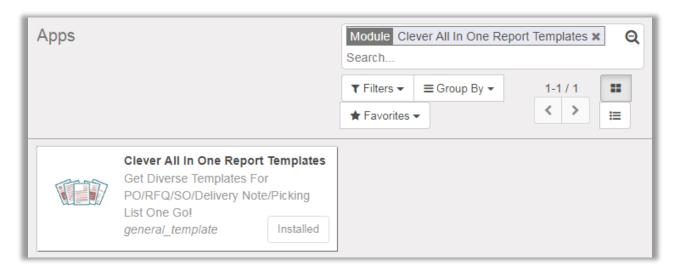
- Click on **'Update'** button.

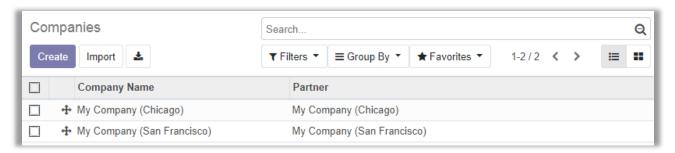**Step 8: Go to Apps**

- 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".
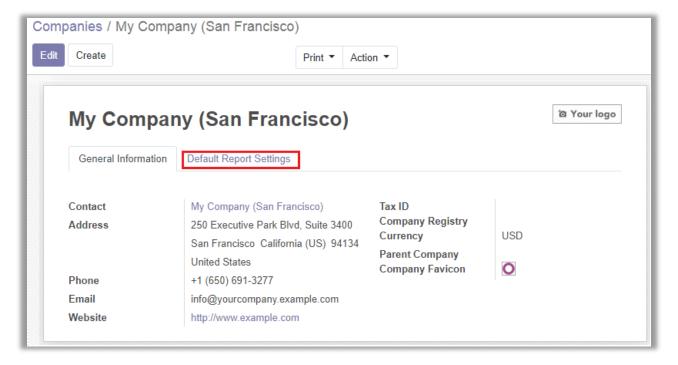
- Click on **'Install'** button.

App Configuration

Configuring 'Default Report Templates'

- You can set the Report Templates for the Companies.

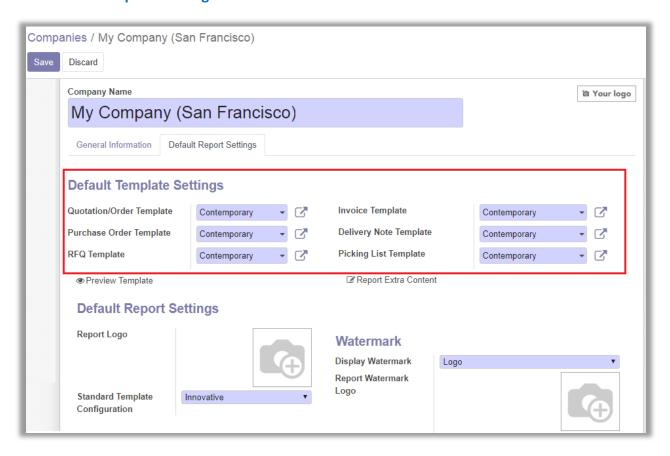- Go to **Settings -> User & Companies** (on header) -> **Companies**

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

- Now click on **'Edit' button** to edit the template and Report.
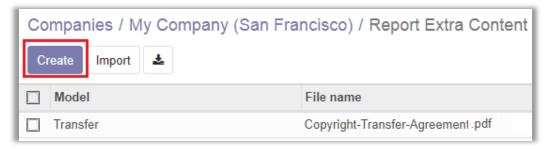
Set 'Default Template Settings'

- 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.
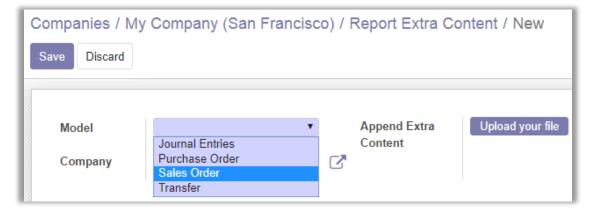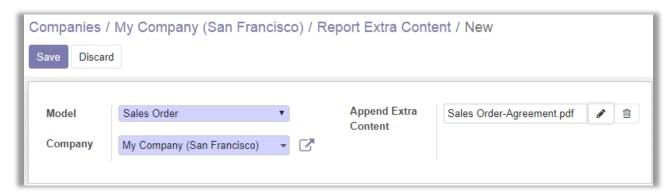
Extra Content Configuration

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

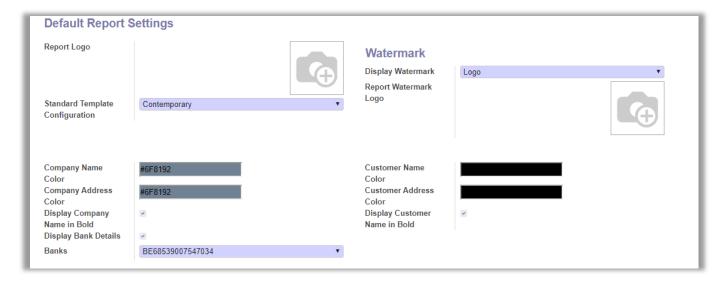- You can edit the existing or create a new one.

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

- 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
    - Contemporary
    - Creative
    - Elegant

    - Exclusive
    - Incredible
    - Innovative
    - Professional

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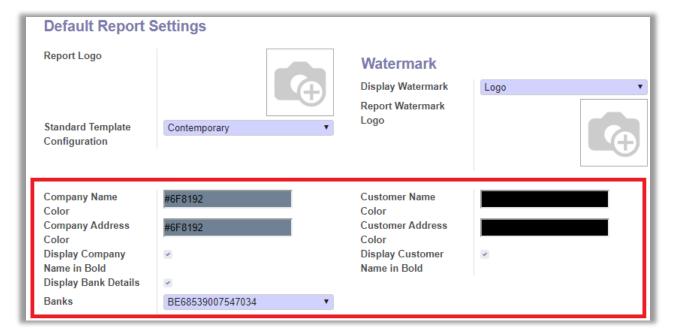
  - **Standard Template Configuration**:

- 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.

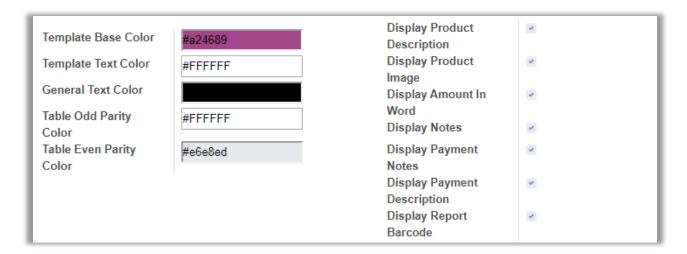**NOTE**: Watermark feature is not provided for Odoo v8.0

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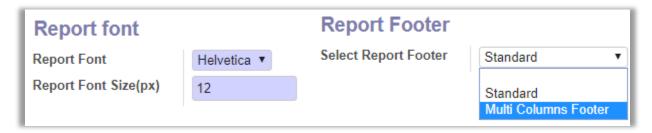
Left side options: (Settings for displaying the details of Template & Table content)

- **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.
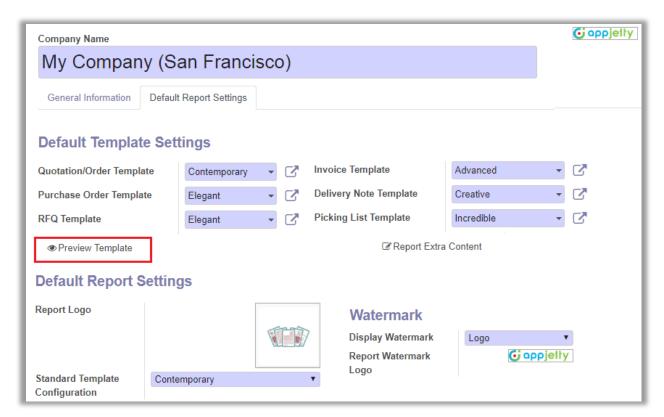
Report Font & Footer

- 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

- 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

- 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**.

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**.

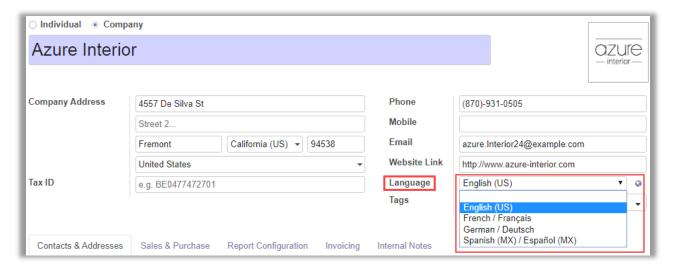- Select the customer and then click on **'Edit'** to set the default template for the selected customer.

- 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.
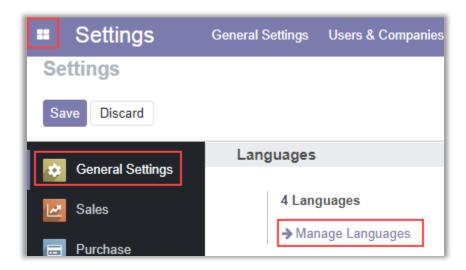
Configure Language for Report

- 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.

- 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**.
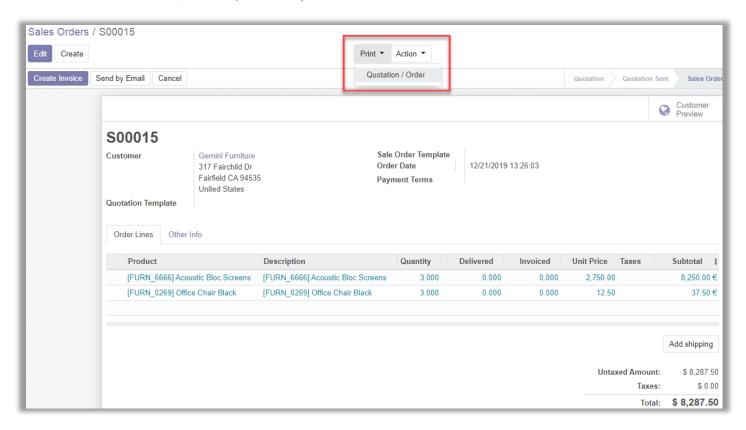

- Click on the **Manage Languages** to choose the language and load the chosen language. Save the changes.

Printing the Reports
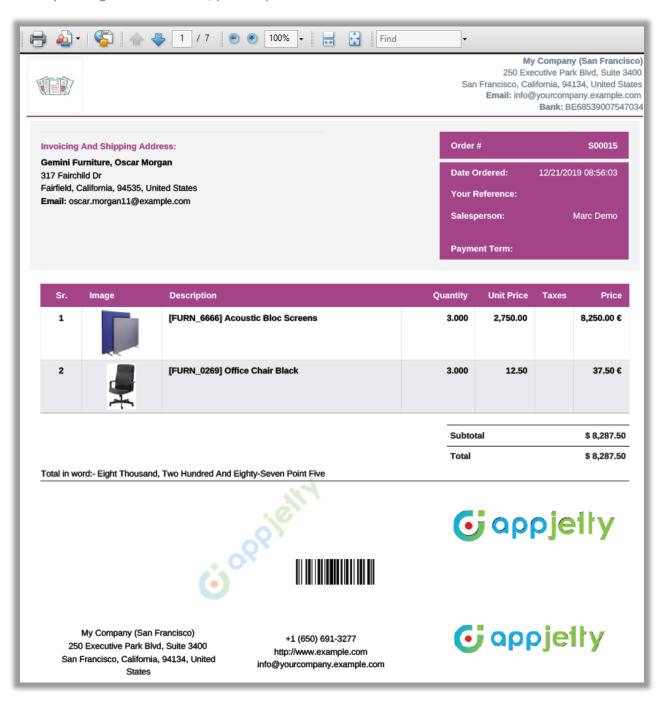
Printing option for the Sales Orders

- 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.

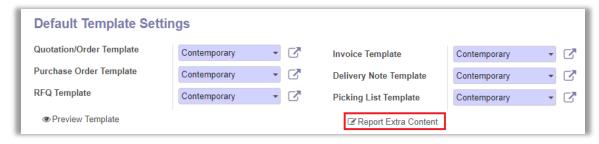- By clicking on **Quotation / Order**, you can print out *or* download the PDF of the Sales Order.

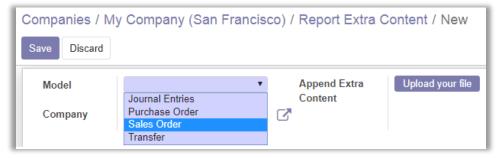## Printing Sales Orders - PDF

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

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.
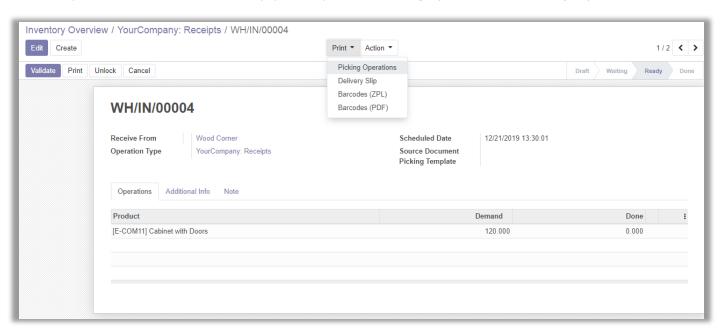

- The extra content file will be attached with the Sales Order.

- 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**.

- 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**)

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- 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