

User Guide

Odoo SaaS Script Software as a Service Saaskit



PRAGMATIC

Prepared by

Pragmatic Techsoft Pvt. Ltd.

Are you starting to offer Odoo to your customers in the cloud. Do you want to avoid having to write the Subscription Management, Recurring Billing ?

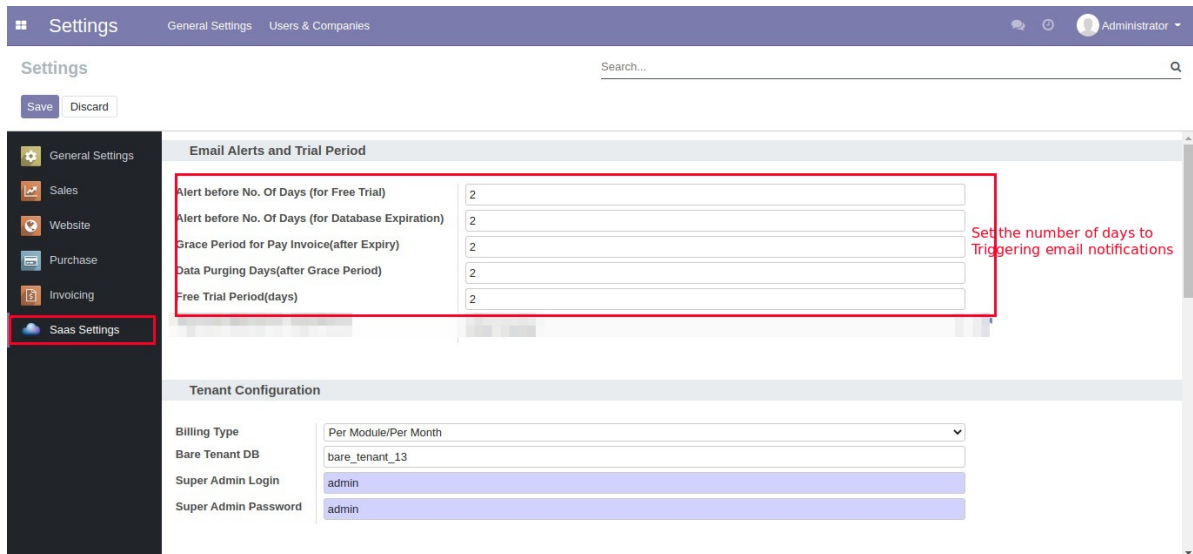
Avail Odoo as a Service(SaaS) on your servers with Odoo SaaS Kit.

- Using Odoo as a Service (SaaS) is a minimal requirement service which uses least server resources. This helps in bringing down the cost substantially.
- On the other hand, Odoo Saas setup is a bit hard and providing the service to others only compounds the challenges.
- With Odoo SaaS Kit, you get the necessary ready-to-use structure to start your own Odoo SaaS service.

We need valid domain (which support Subdomain) which will be pointing to saasmaster database. All tenant databases shall be accessed as a sub domain link.

SaaS Kit Configurations

For SaaS Configurations you will need to go to. Make sure you have given full access rights to the user for SaaS Module



The screenshot shows the Odoo SaaS Kit configuration interface. The top navigation bar includes 'Settings', 'General Settings', and 'Users & Companies'. The left sidebar lists various modules, with 'SaaS Settings' highlighted. The main content area is divided into two sections: 'Email Alerts and Trial Period' and 'Tenant Configuration'.

Email Alerts and Trial Period

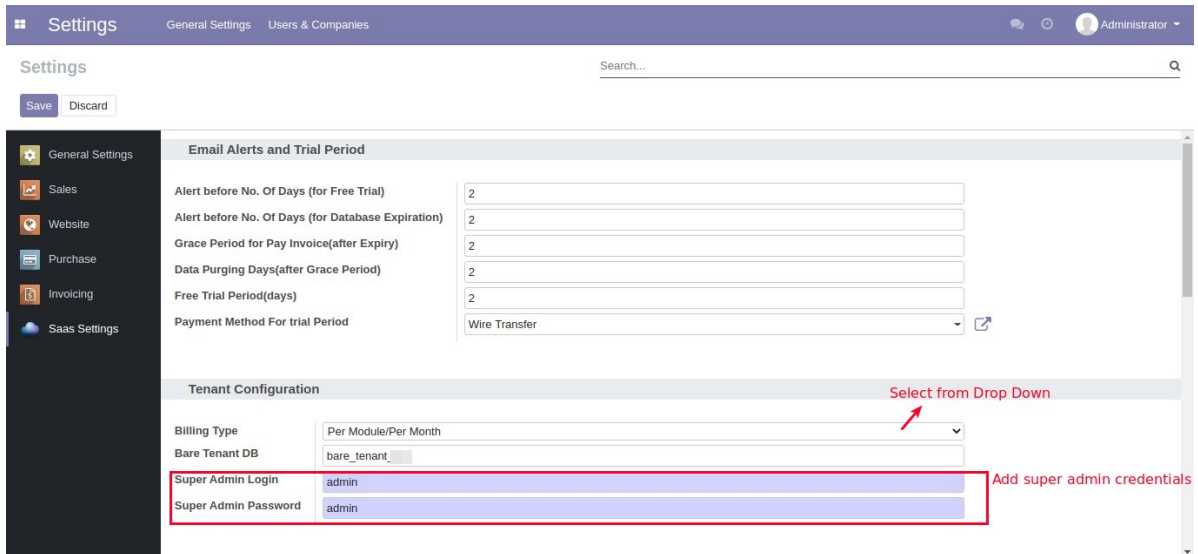
Alert before No. Of Days (for Free Trial)	2
Alert before No. Of Days (for Database Expiration)	2
Grace Period for Pay Invoice(after Expiry)	2
Data Purging Days(after Grace Period)	2
Free Trial Period(days)	2

A red box highlights the input fields for the first five rows of the 'Email Alerts and Trial Period' section. A red annotation to the right of the box reads: 'Set the number of days to Triggering email notifications'.

Tenant Configuration

Billing Type	Per Module/Per Month
Bare Tenant DB	bare_tenant_13
Super Admin Login	admin
Super Admin Password	admin

- User need to configure the pricing policy for the sell of saaS . Currently module offers pricing on /module/user/month basis. Define Super user & Password in this configuration. This will allow user to login in tenant database using these credentials.



Settings General Settings Users & Companies Administrator

Settings Search...

Save Discard

Email Alerts and Trial Period

Alert before No. Of Days (for Free Trial) 2

Alert before No. Of Days (for Database Expiration) 2

Grace Period for Pay Invoice(after Expiry) 2

Data Purging Days(after Grace Period) 2

Free Trial Period(days) 2

Payment Method For trial Period Wire Transfer

Tenant Configuration Select from Drop Down

Billing Type Per Module/Per Month

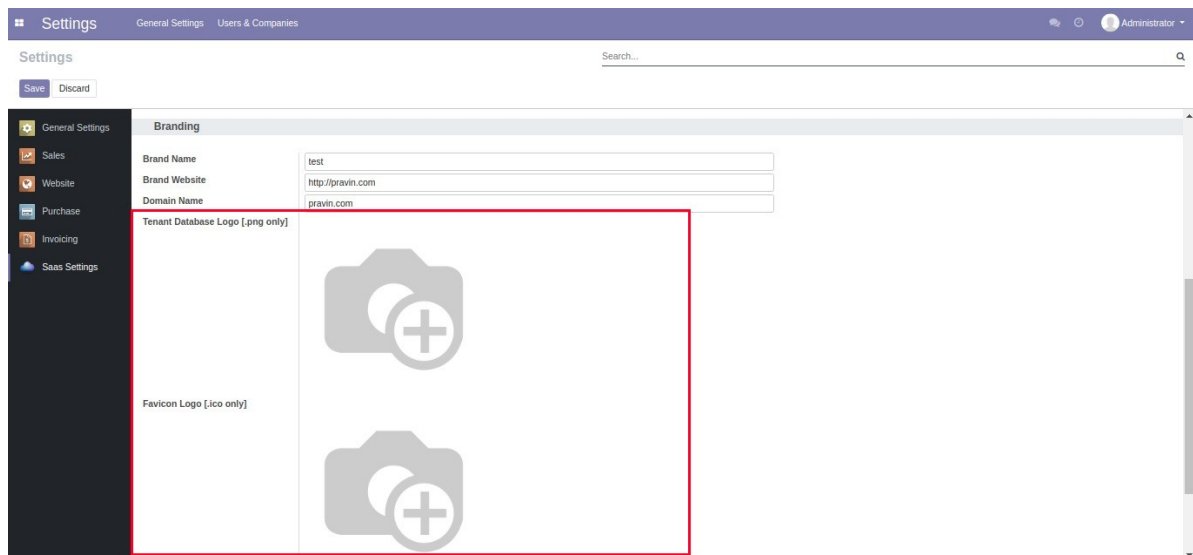
Bare Tenant DB bare_tenant

Super Admin Login admin

Super Admin Password admin

Add super admin credentials

- You can assign hosting company logo and fevicon to appear on the browser in the following section



Settings General Settings Users & Companies Administrator

Settings Search...

Save Discard

Branding

Brand Name test

Brand Website http://pravin.com

Domain Name pravin.com

Tenant Database Logo [png only]

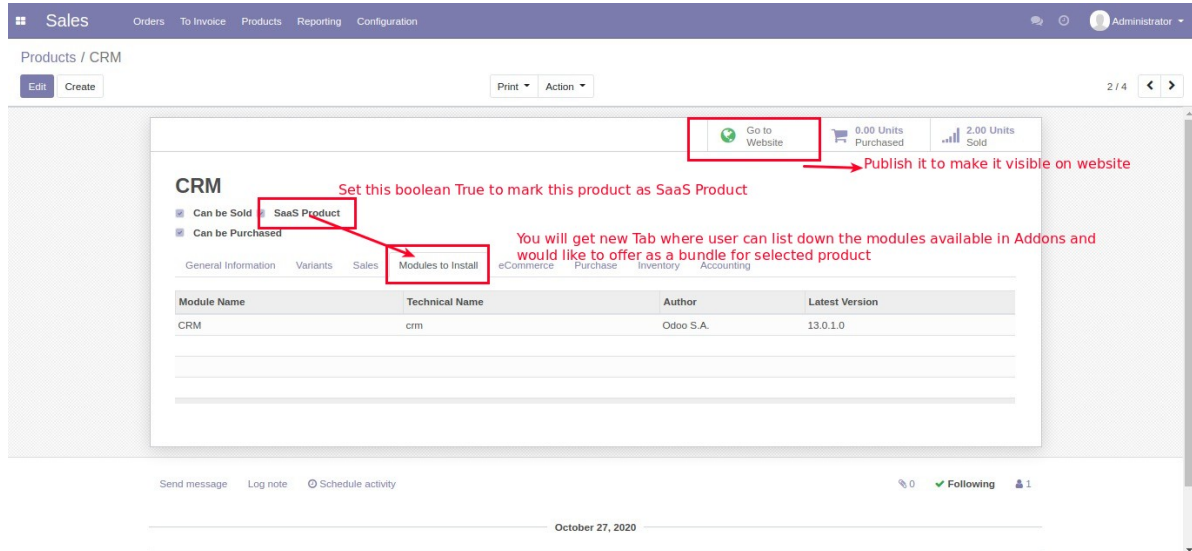
Favicon Logo [ico only]

In Brand Name : Put Company name

In Brand website : input related domain name with https or http

in Domain name: input related domain name without https or http

- User will have to configure the SaaS Product which will be available for website users to select in their order request. Assign the sale price for the product on /module/user/month basis.



Sales Orders To Invoice Products Reporting Configuration Administrator

Products / CRM

Print Action 2 / 4

CRM

Go to Website 0.00 Units Purchased 2.00 Units Sold

Set this boolean True to mark this product as SaaS Product

Can be Sold ☒ SaaS Product

Can be Purchased ☒

General Information Variants Sales **Modules to Install** eCommerce Purchase Inventory Accounting

You will get new Tab where user can list down the modules available in Addons and would like to offer as a bundle for selected product

Module Name	Technical Name	Author	Latest Version
CRM	crm	Odoo S.A.	13.0.1.0

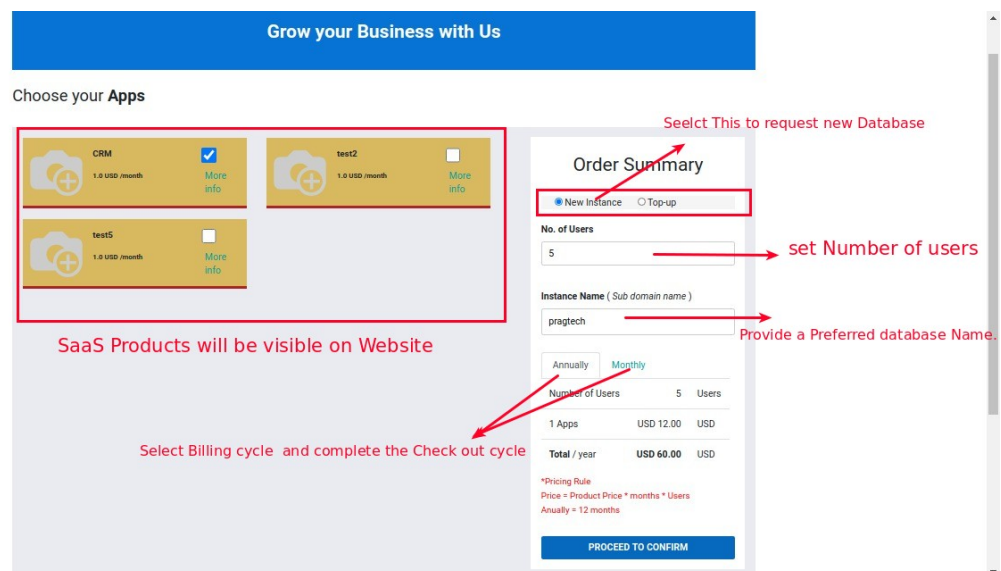
Send message Log note Schedule activity 0 Following 1

October 27, 2020

SaaS Kit Transactions

1. New database creation request

- Web site user will have to login and create an account in order to request for the new database creation request. When user goes to SHOP page he will see following screen



Grow your Business with Us

Choose your Apps

CRM 1.0 USD /month ☒ More info

test2 1.0 USD /month ☐ More info

test5 1.0 USD /month ☐ More info

SaaS Products will be visible on Website

Select Billing cycle and complete the Check out cycle

Select This to request new Database

Order Summary

☒ New Instance ☐ Top-up

No. of Users: 5 (set Number of users)

Instance Name (Sub domain name): pragtech (Provide a Preferred database Name.)

Annually Monthly

Number of Users: 5 Users

1 Apps USD 12.00 USD

Total / year USD 60.00 USD

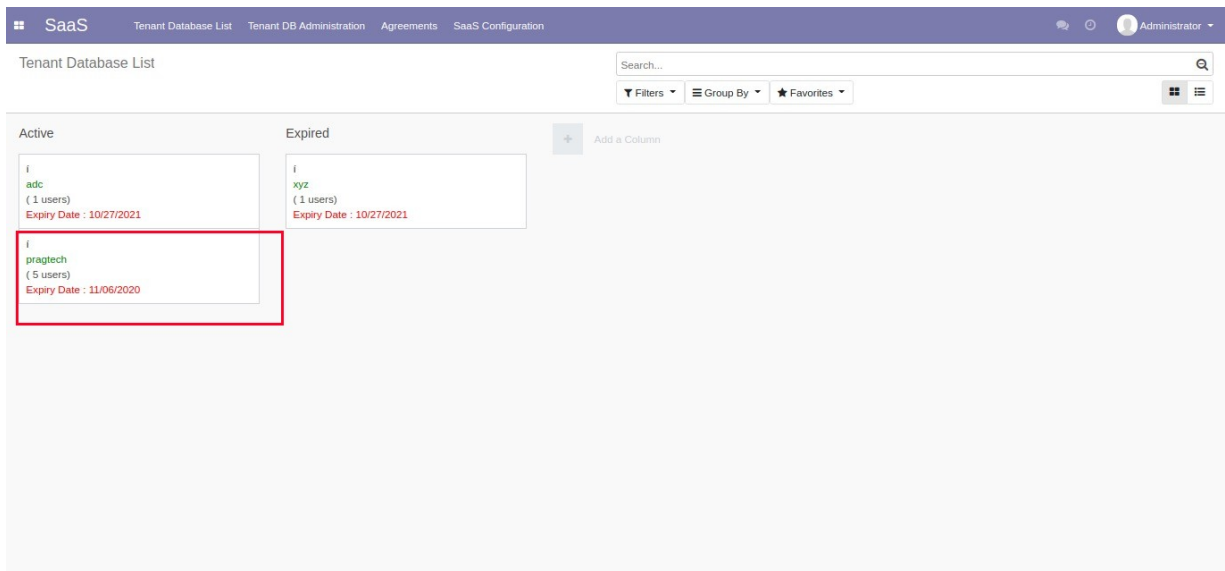
*Pricing Rule
Price = Product Price * months * Users
Annually = 12 months

PROCEED TO CONFIRM

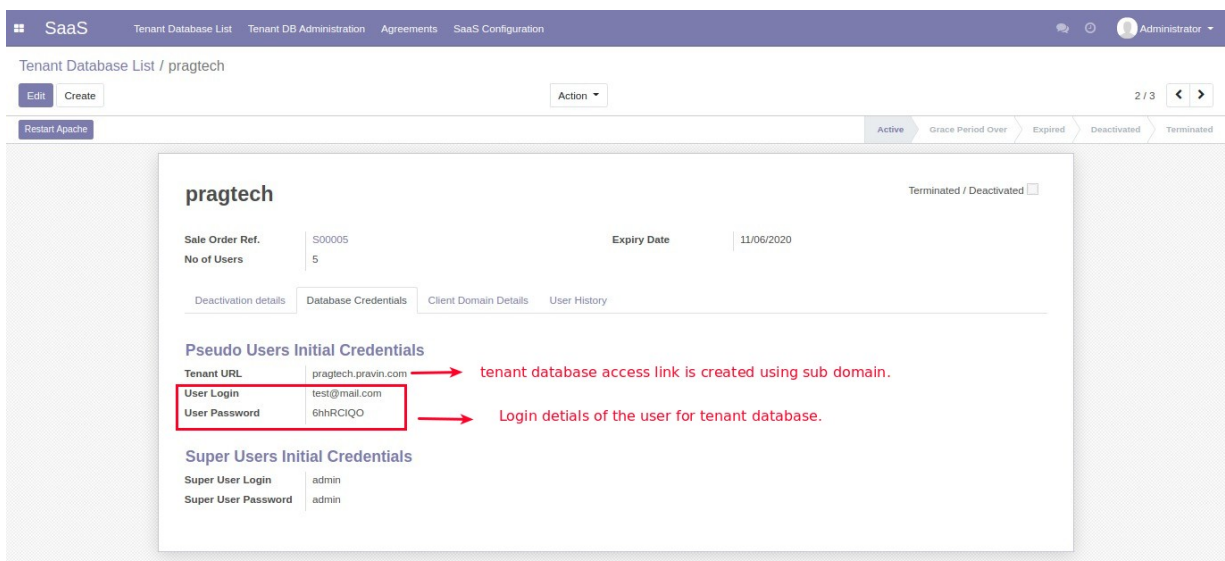
Provide appropriate information in the as mentioned above and complete the checkout

process. This will create a sales order in the back end.

2. Login to the saasmaster database and open the related Sales Order and confirm it. On confirmation Odoo will start creating the database and will install those modules which are selected in the new database creation request.
3. After completing the process user can see the newly created database in a “Tenant Database List” in Saasmaster database.



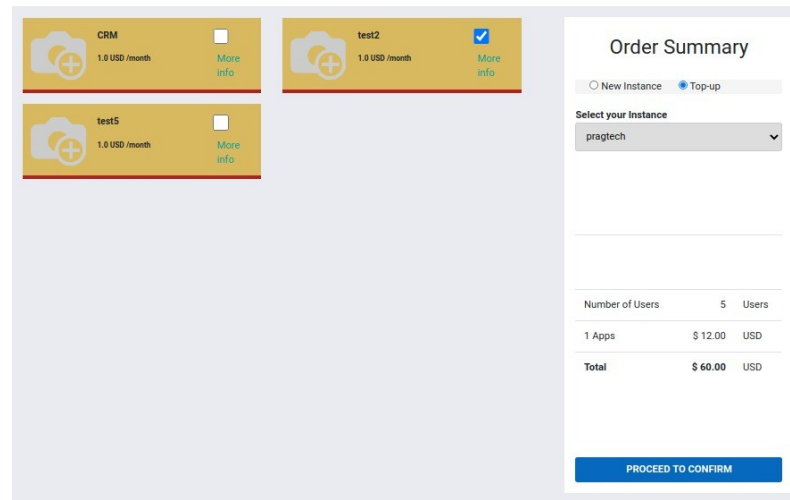
4. If you click on the given database and go to the “Database Credentials” tab then use can see the access url for that database user ID and the password of the user. This information gets emailed to the customer on the registered email ID



2. Top-up Request

- Using Top-up request customer can add additional modules in the existing database. For this website user will login to website of saasmaster database and goto SHOP. He will select “Top-Up” and need to select the existing databases he has created from the account

Choose your Apps



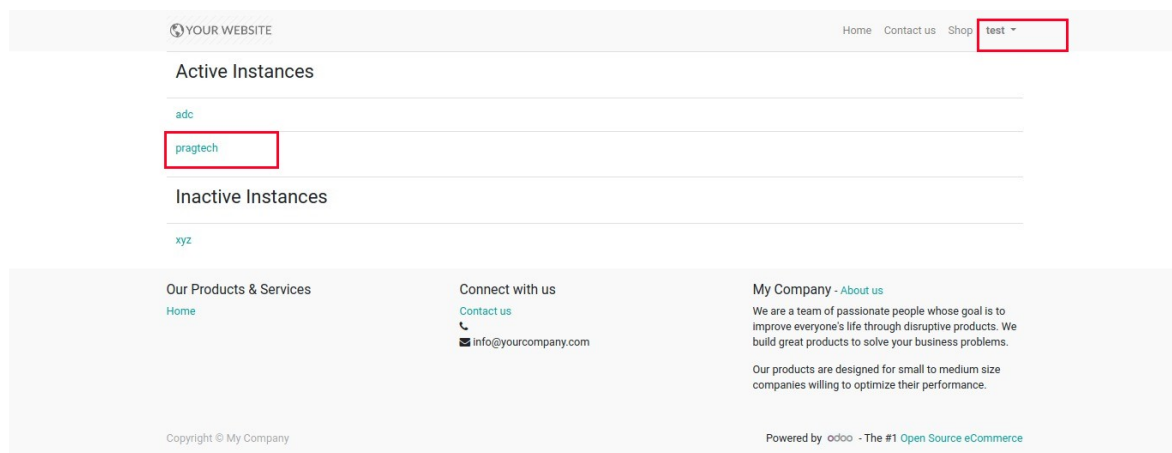
The screenshot shows a 'Choose your Apps' interface. On the left, there are three modules: CRM (1.0 USD /month), test2 (1.0 USD /month), and test5 (1.0 USD /month). The 'test2' module is selected with a blue checkmark. On the right, there is an 'Order Summary' section. It includes a radio button for 'New Instance' and a selected radio button for 'Top-up'. Below this is a dropdown menu for 'Select your Instance' with 'pragtech' selected. The summary table shows: Number of Users: 5 Users; 1 Apps: \$ 12.00 USD; Total: \$ 60.00 USD. At the bottom is a blue button labeled 'PROCEED TO CONFIRM'.

- Then select the modules you need to install in the selected database. And proceed with the checkout process. This considerer the number of users allowed in that Database for billing purpose.
- On Completion of Checkout process, Operations user will have to confirm the order manually and on confirmation it will install modules to the selected database.

3. Tenant Account Activities on saasmaster database

1. Checking Databases

- When Website customer log in to saasmaster database then they can see list of Databases created with given login so far under “My Account menu → My Instances”



The screenshot shows the 'My Account' page. At the top, there is a navigation bar with 'YOUR WEBSITE' and links for 'Home', 'Contact us', 'Shop', and 'test'. Below this, the 'Active Instances' section is visible, showing a list of instances: 'adc' and 'pragtech'. The 'pragtech' instance is highlighted with a red box. Below this is the 'Inactive Instances' section, showing a list of instances: 'xyz'. At the bottom, there is a footer with 'Our Products & Services', 'Connect with us', and 'My Company - About us'.

2. Clicking on the Database name will take you to the details page which shows following information.

YOUR WEBSITE

Home Contact us Shop test

pragtech

Number of Users :	5 Add more
Expiry Date :	2020-11-06
URL :	pragtech.pravin.com
Tenant Admin User :	test@mail.com

Users

	test	test@mail.com	Pseudo User(Tenant Admin User)
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Our Products & Services

[Home](#)

Connect with us

[Contact us](#)
info@yourcompany.com

My Company - About us

We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.

Our products are designed for small to medium size companies willing to optimize their performance.

Copyright © My Company

Powered by odoo - The #1 Open Source eCommerce

2. Increasing Number of Users

1. If customer wants to increase the number of users for a particular Database then customer need to select the required database as shown in above steps

YOUR WEBSITE

Home Contact us Shop test

pragtech

Number of Users :	5 Add more	Click here to increase number of users and hit confirm. This will immediately increase the user limit and additional users will get billed in next billing cycle
Expiry Date :	2020-11-06	
URL :	pragtech.pravin.com	
Tenant Admin User :	test@mail.com	

Users

	test	test@mail.com	Pseudo User(Tenant Admin User)
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Our Products & Services

[Home](#)

Connect with us

[Contact us](#)
info@yourcompany.com

My Company - About us

We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.

Our products are designed for small to medium size companies willing to optimize their performance.

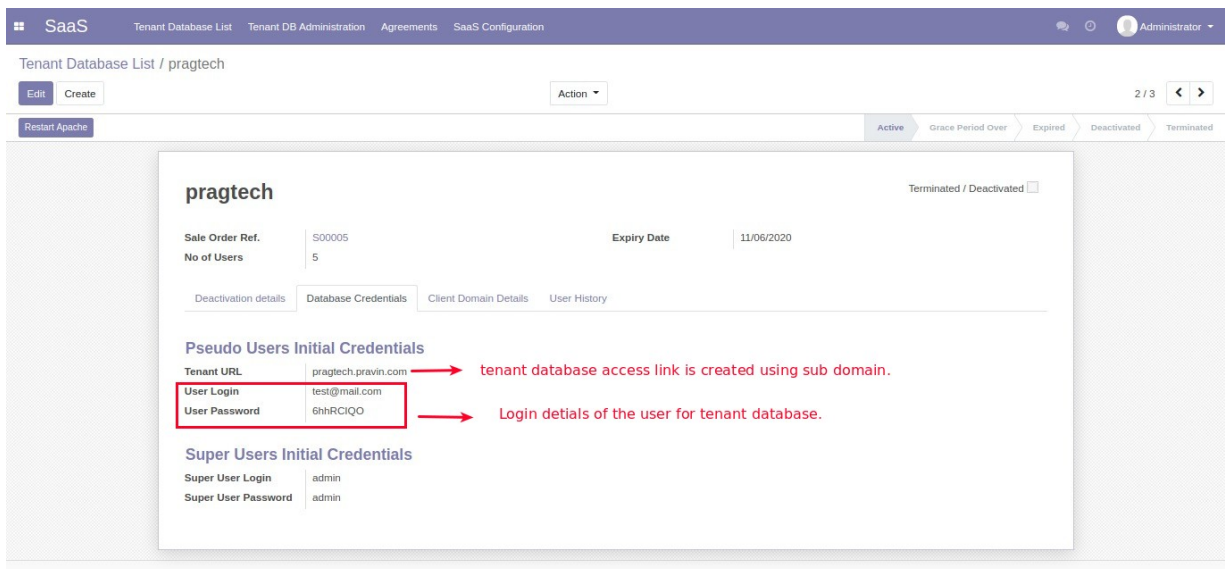
Copyright © My Company

Powered by odoo - The #1 Open Source eCommerce

2. Click on “Add more to increase number of users and hit confirm. This will immediately increase the user limit and additional users will get billed in next billing cycle

4. Tenant Login to Tenant Database

Tenant user will get login in to the database using the credentials generated

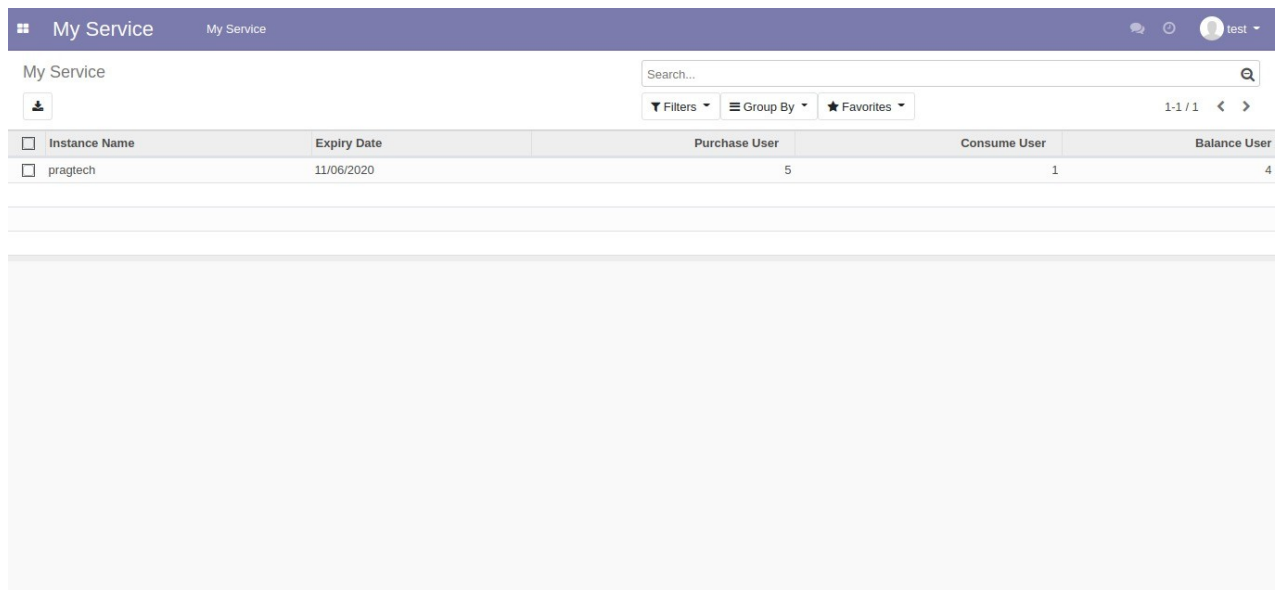


The screenshot shows the 'SaaS' interface with a navigation bar containing 'Tenant Database List', 'Tenant DB Administration', 'Agreements', and 'SaaS Configuration'. The main content area displays the 'pragtech' tenant details. A modal window titled 'pragtech' is open, showing the following information:

- Sale Order Ref.:** S00005
- No of Users:** 5
- Expiry Date:** 11/06/2020
- Database Credentials:**
 - Tenant URL:** pragtech.pravin.com
 - User Login:** test@mail.com
 - User Password:** 6nhRCIQO
- Super Users Initial Credentials:**
 - Super User Login:** admin
 - Super User Password:** admin

Red arrows point from the 'pragtech.pravin.com' and 'test@mail.com' fields to the text: 'tenant database access link is created using sub domain.' and 'Login details of the user for tenant database.' respectively.

Tenant will see following screen when they login



The screenshot shows the 'My Service' interface. At the top, there is a search bar and a 'Filters' button. Below this is a table with the following columns: 'Instance Name', 'Expiry Date', 'Purchase User', 'Consume User', and 'Balance User'. The table contains one row for the 'pragtech' instance.

Instance Name	Expiry Date	Purchase User	Consume User	Balance User
pragtech	11/06/2020	5	1	4

Tenant can continue working on Tenant database