



Configuration Repost

Name: Kashaf Fatima

Roll no. : 22i-2415

Section: SE-6F

Assin : 01

Subject: SCD

Odoo Configuration Report

1. Introduction

This report provides a detailed summary of the configuration steps performed in Odoo 17, covering basic and advanced settings. It includes the setup of company details, installation of essential modules, and customization of sales and inventory workflows. Each step is documented with configurations made and tests conducted to ensure functionality.

2. Initial Configuration

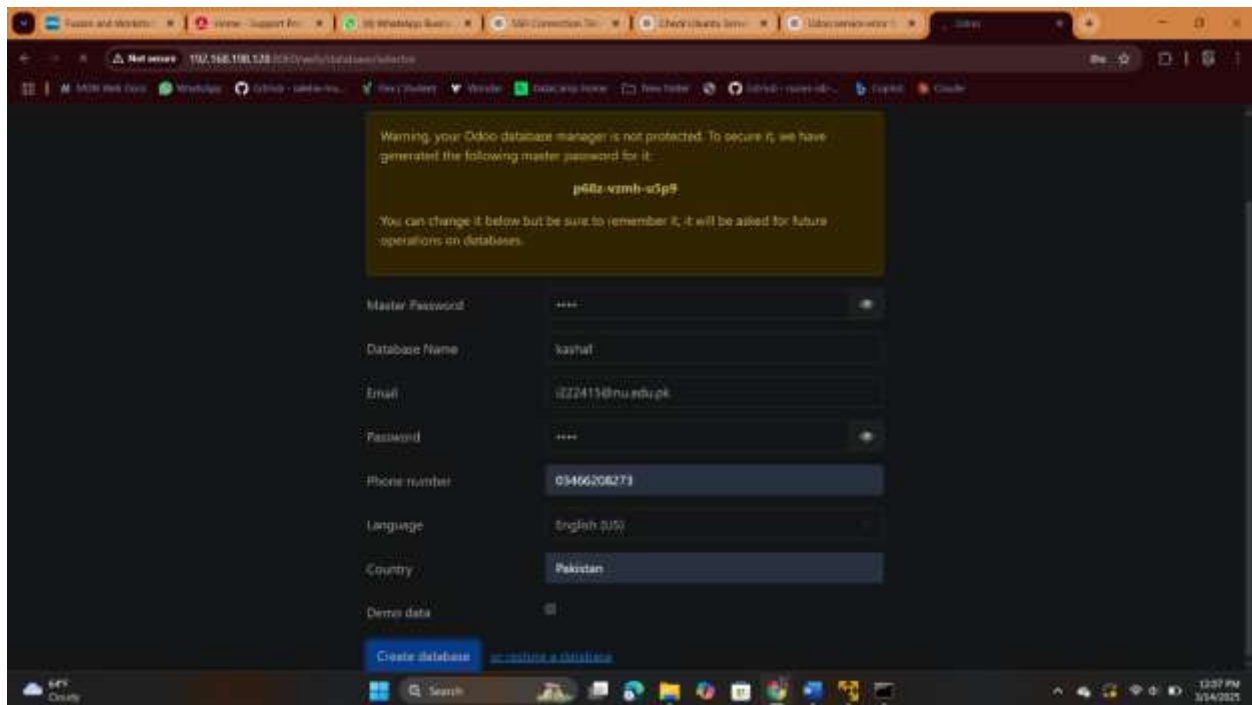
2.1. *Logging into Odoo Web Interface*

- a) Open the browser and access Odoo at:

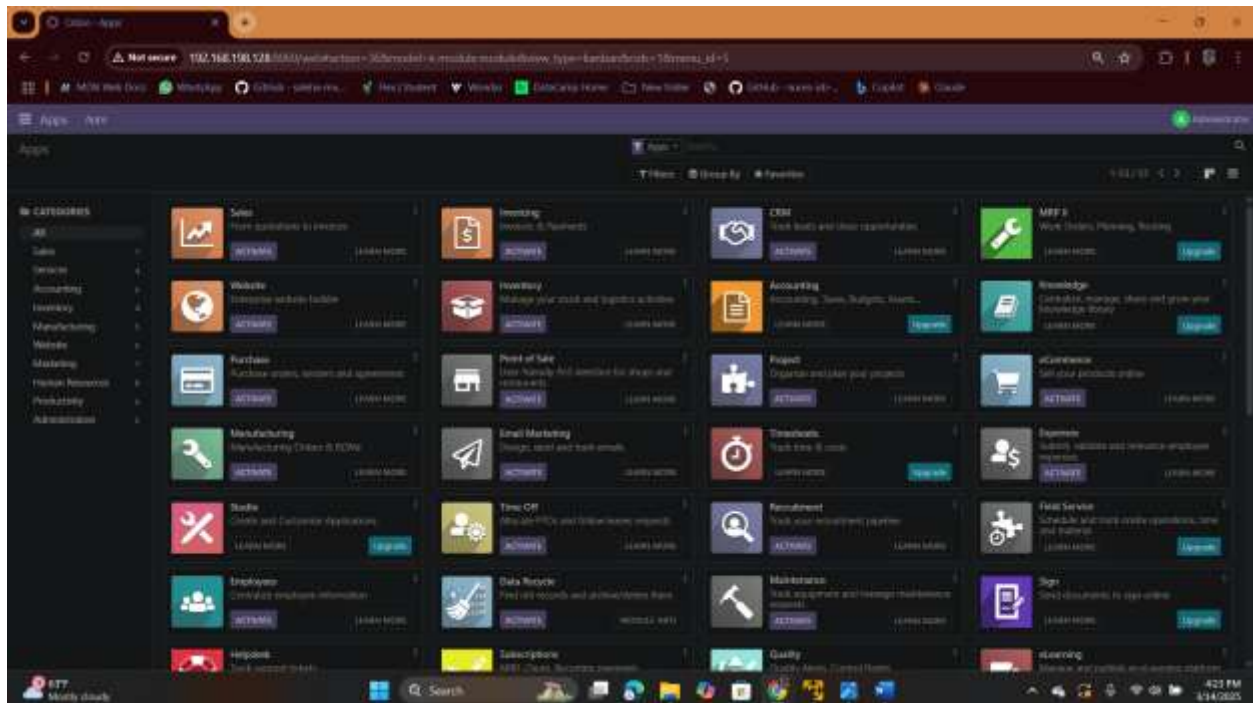
URL:

http://192.168.198.128:8069/web#action=36&model=ir.module.module&view_type=kanban&cids=1&menu_id=5

- b) Enter the credentials



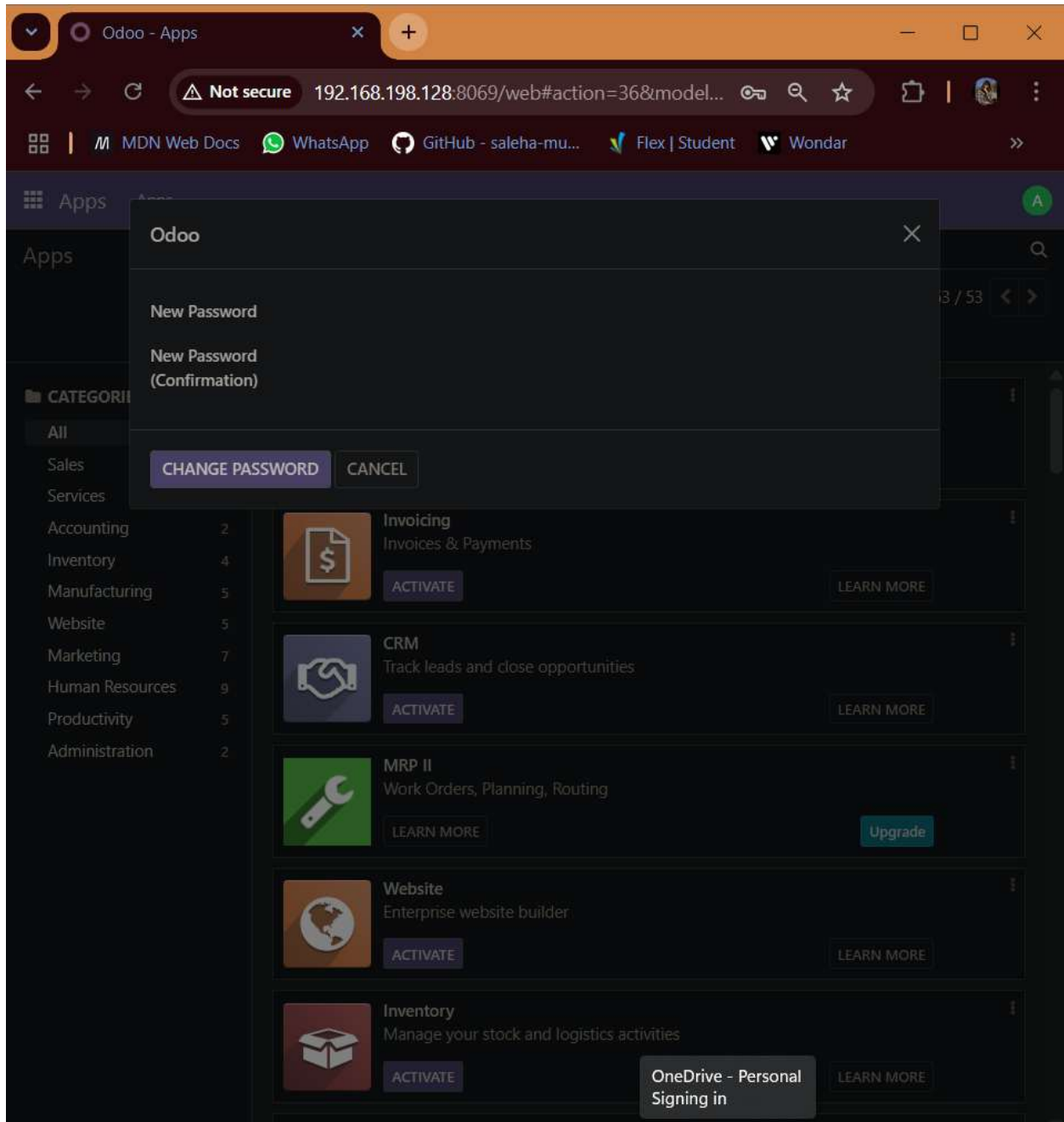
- c) Click "Create Database" in to access the dashboard.



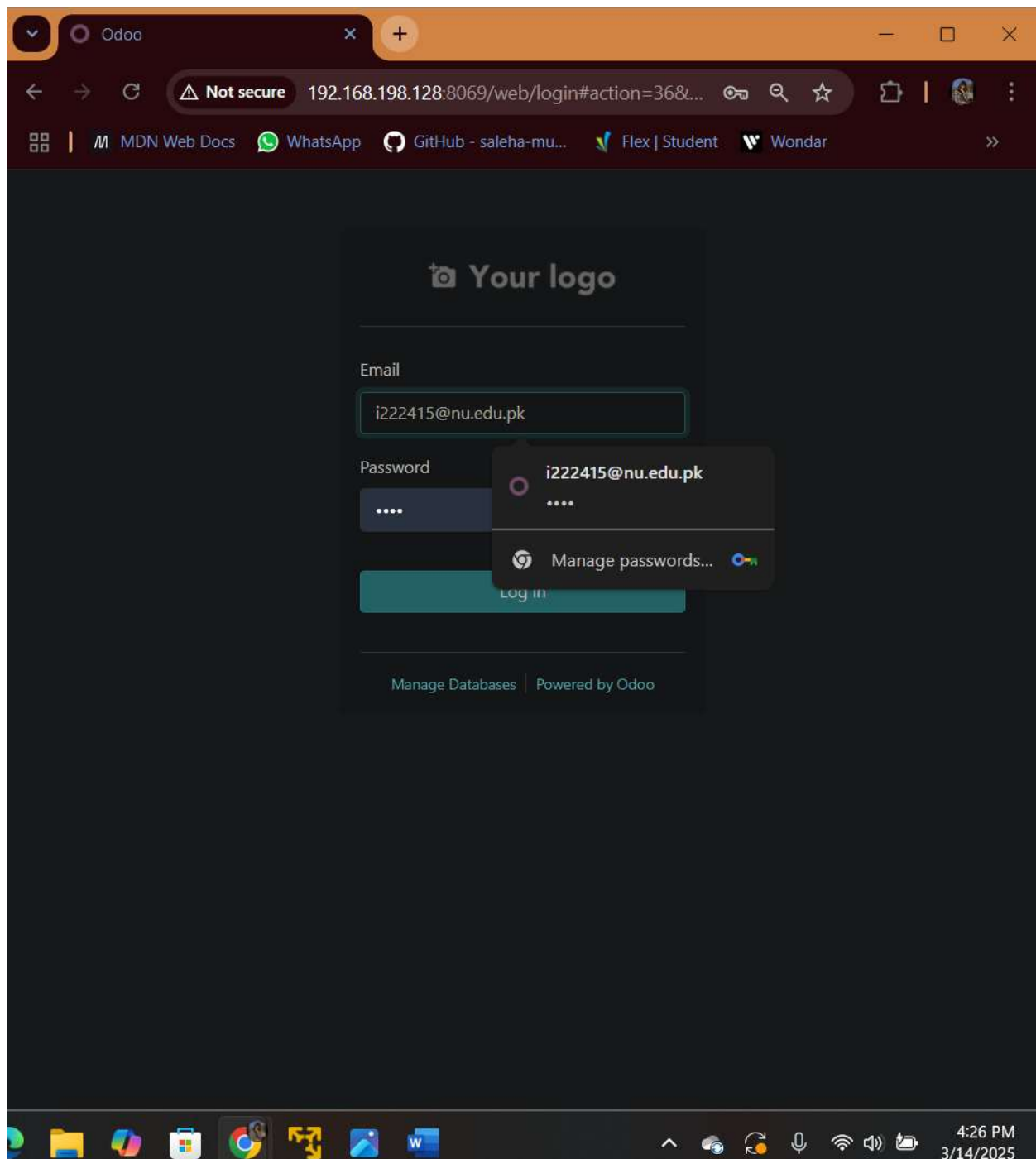
2.2. *Change the default password and create a new user account with administrative privileges.*

2.2.1 *Changing the Default Password*

- a) Click on the profile icon (top-right corner) and select **Preferences**.
- b) Click Change Password, enter a strong new password, and save it.

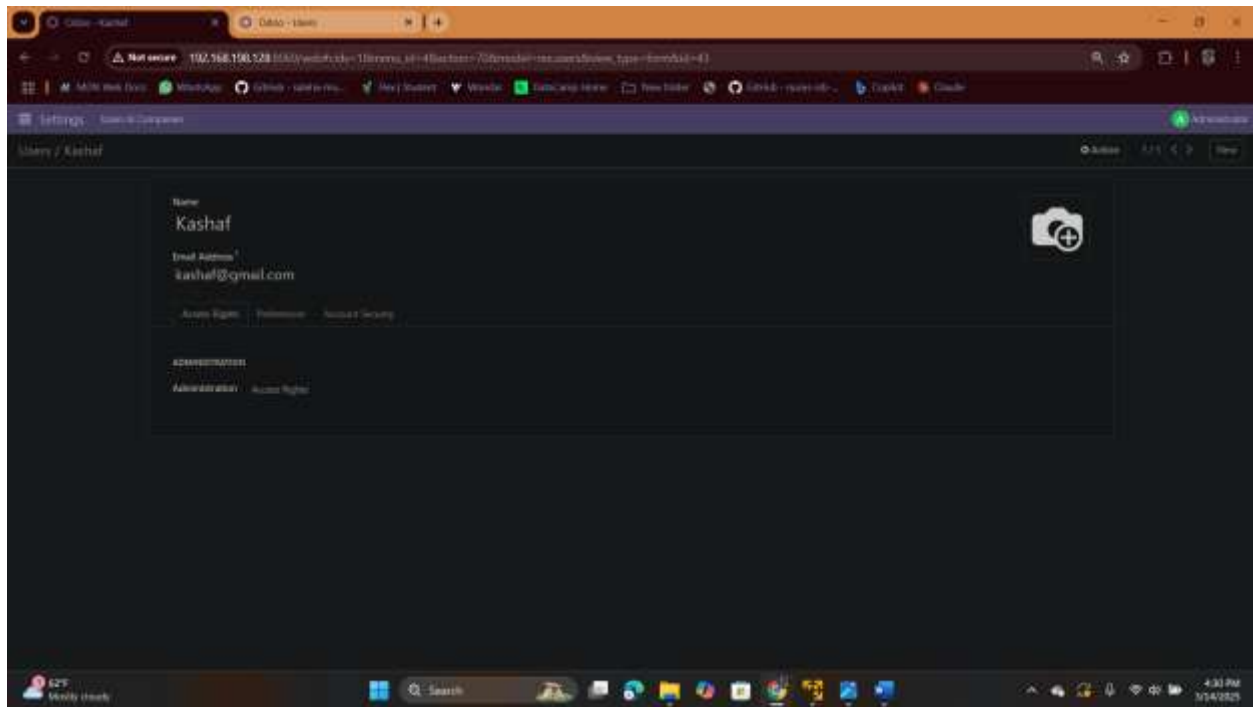


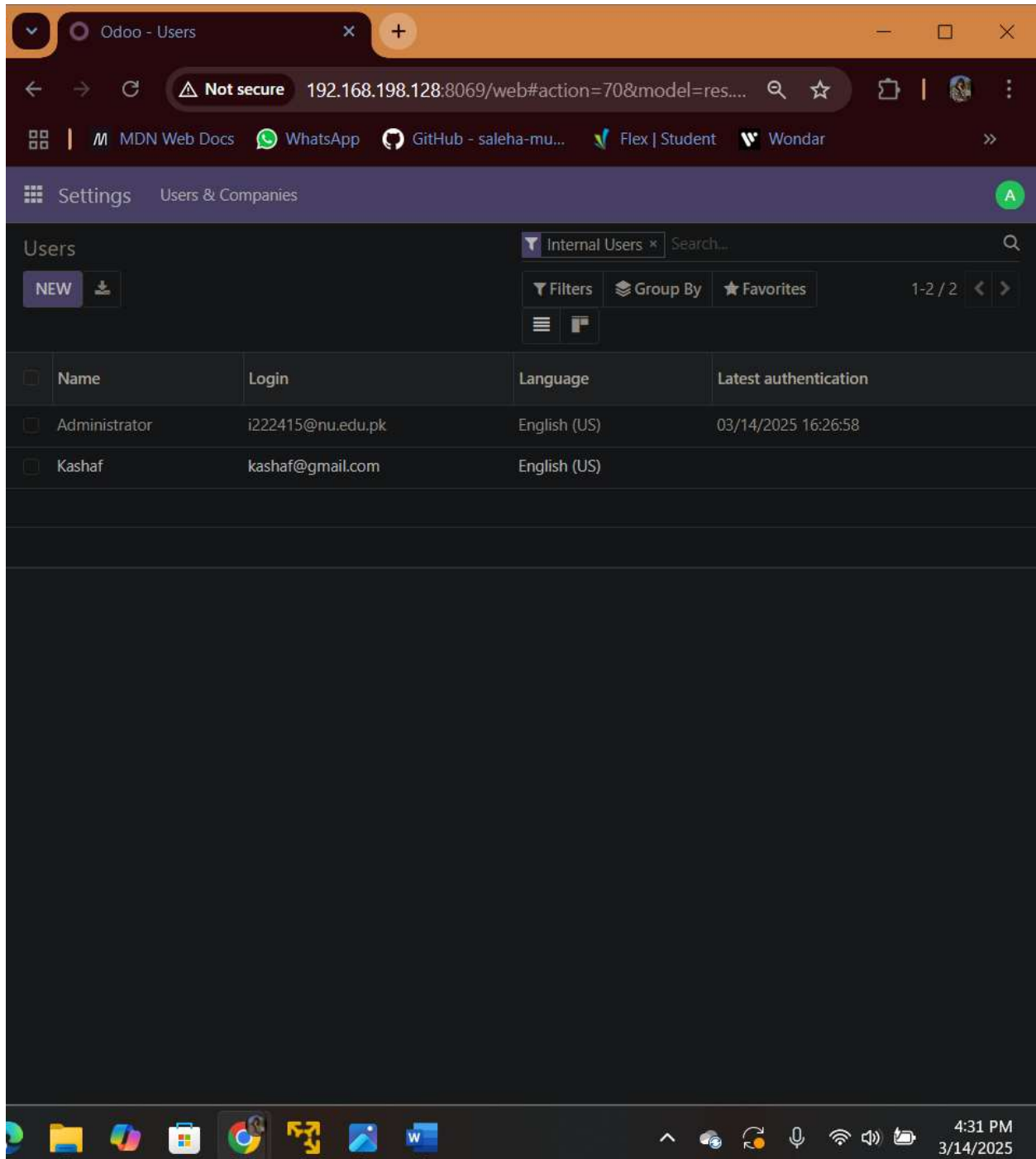
c) Log out and log back in to verify the change.



2.2.2 *Creating a New Admin User*

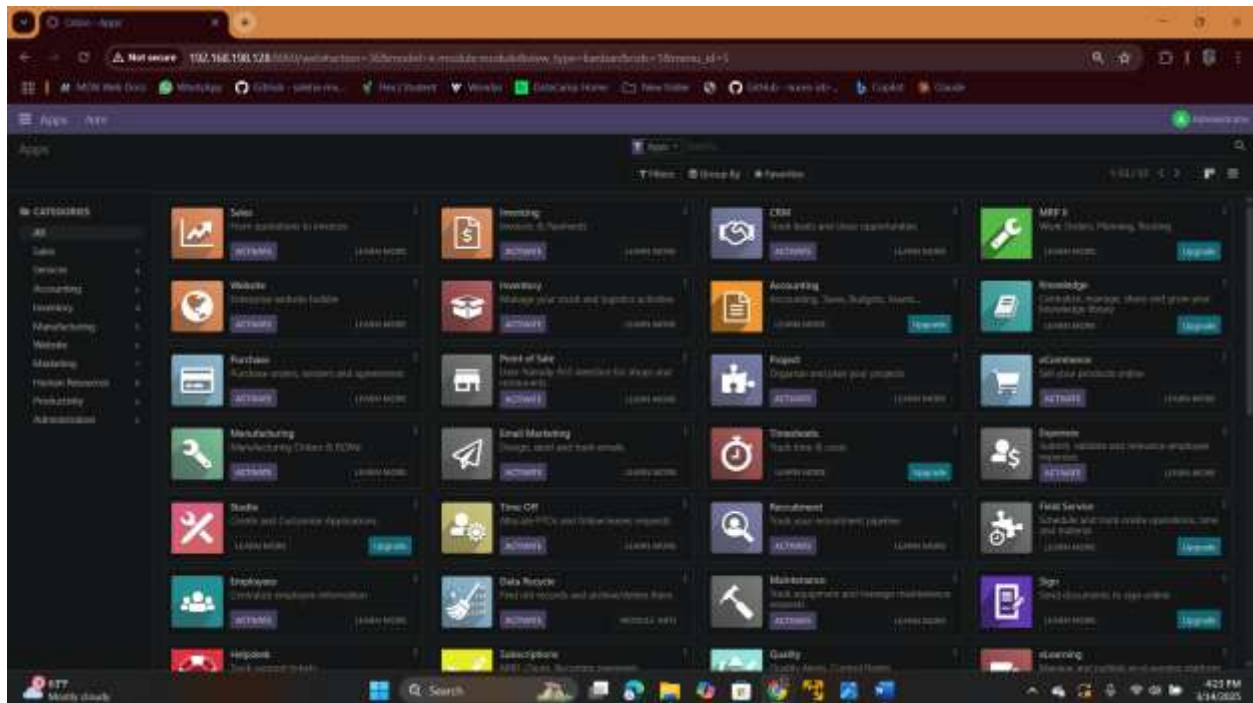
- a) Navigate to Settings → Manage Users.
- b) Click Create and enter details
- c) Click Save to finalize user creation.



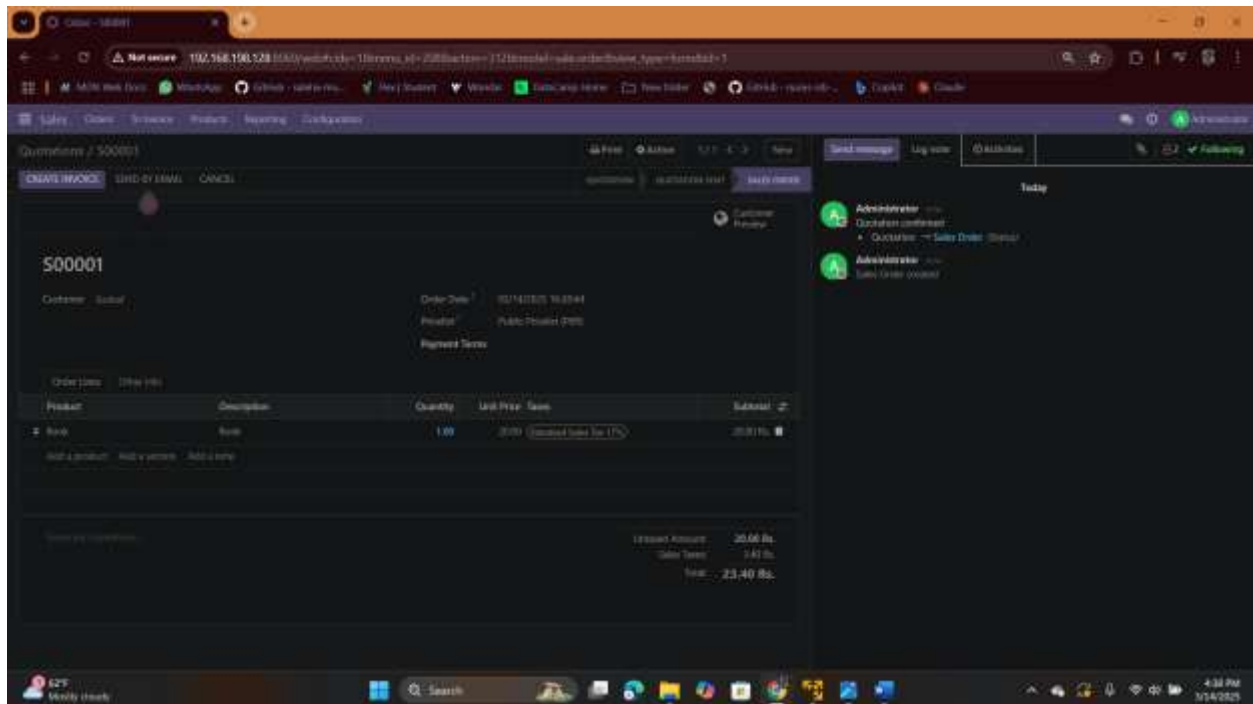


2.3. *Explore the Odoo dashboard and familiarize yourself with the different modules available.*

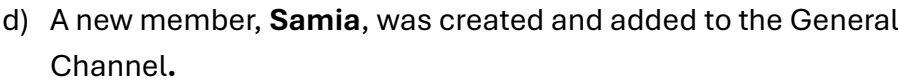
- a) After logging in, the dashboard displays various modules like Sales, Inventory, and Accounting.



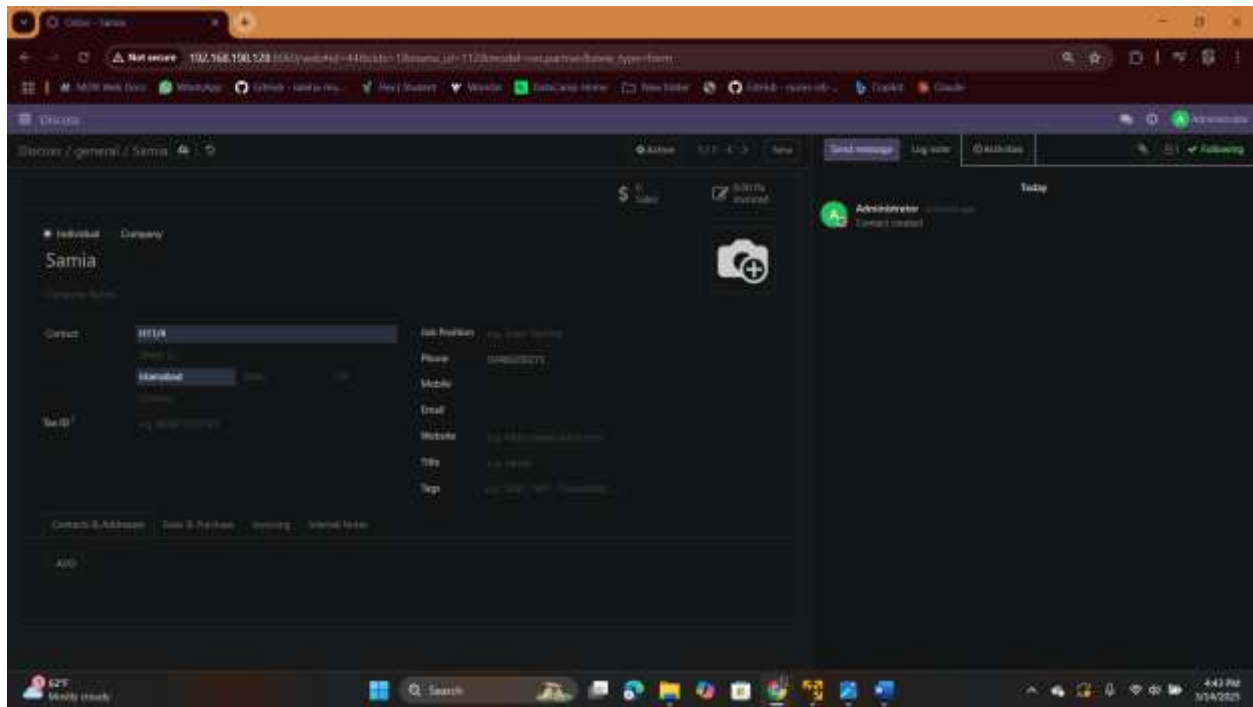
b) The Sales Module was activated.



c) A customer invoice was created for "Kashaf," purchasing 20 books in a quotation.

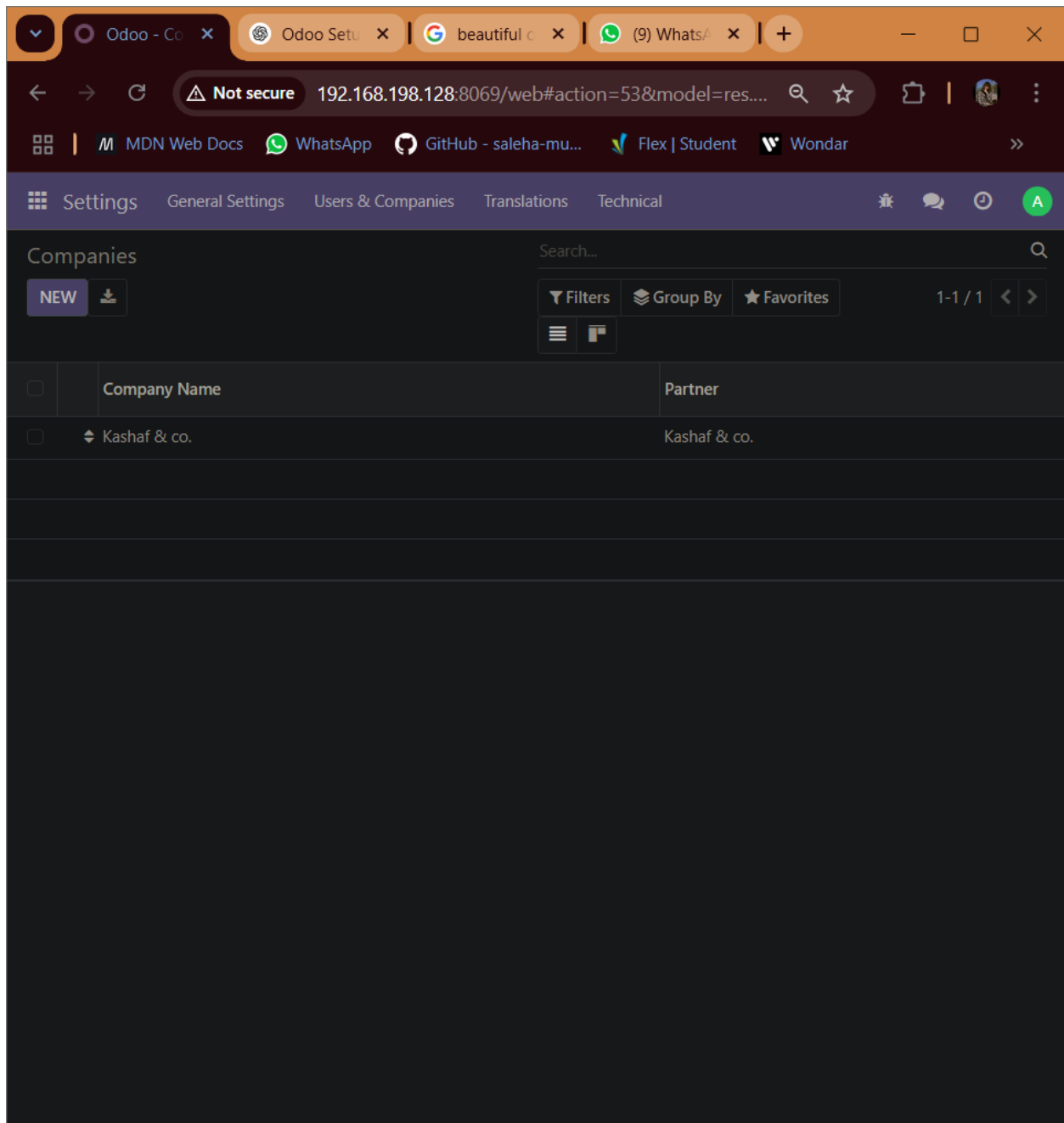


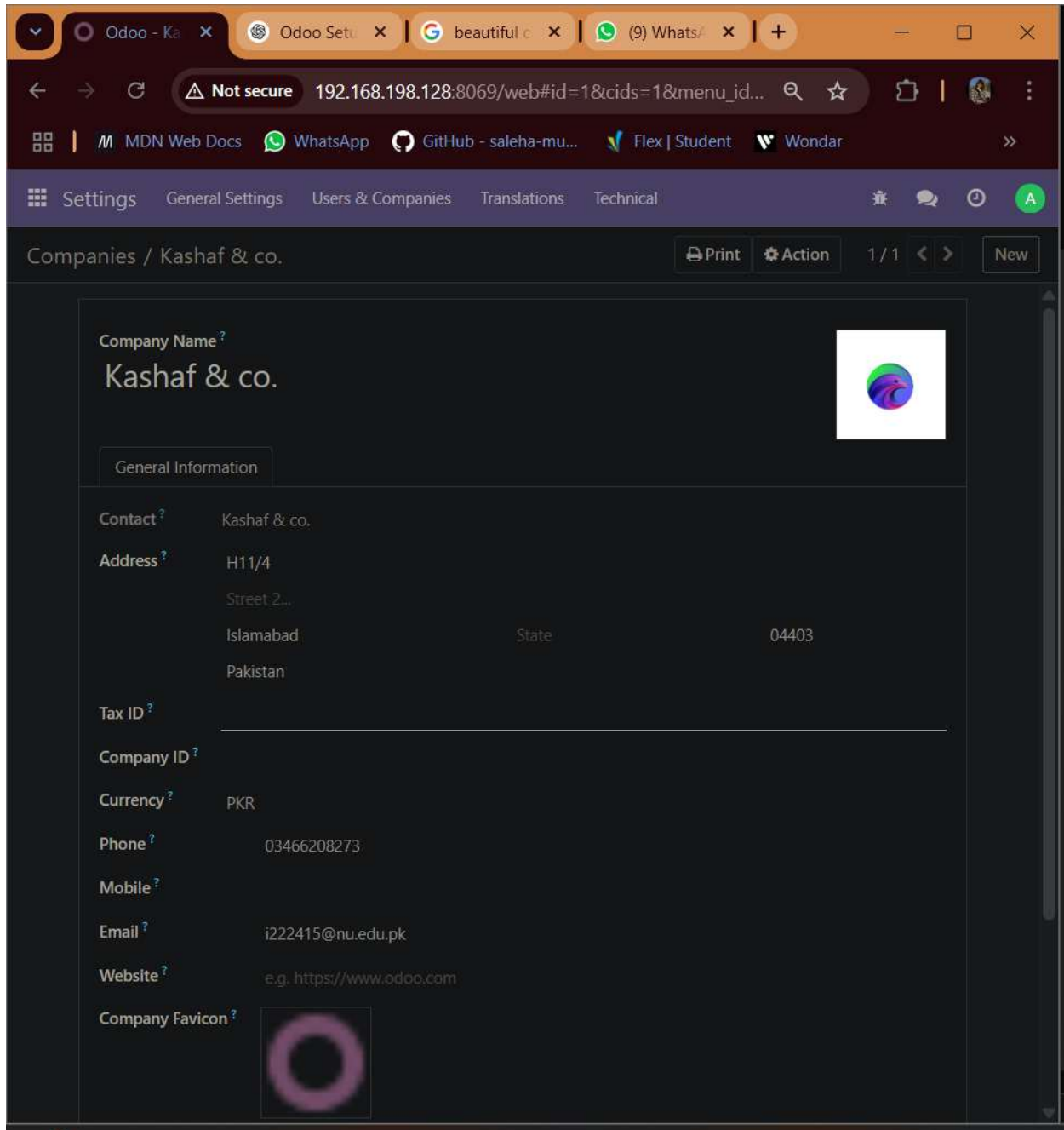
d) A new member, **Samia**, was created and added to the General Channel.



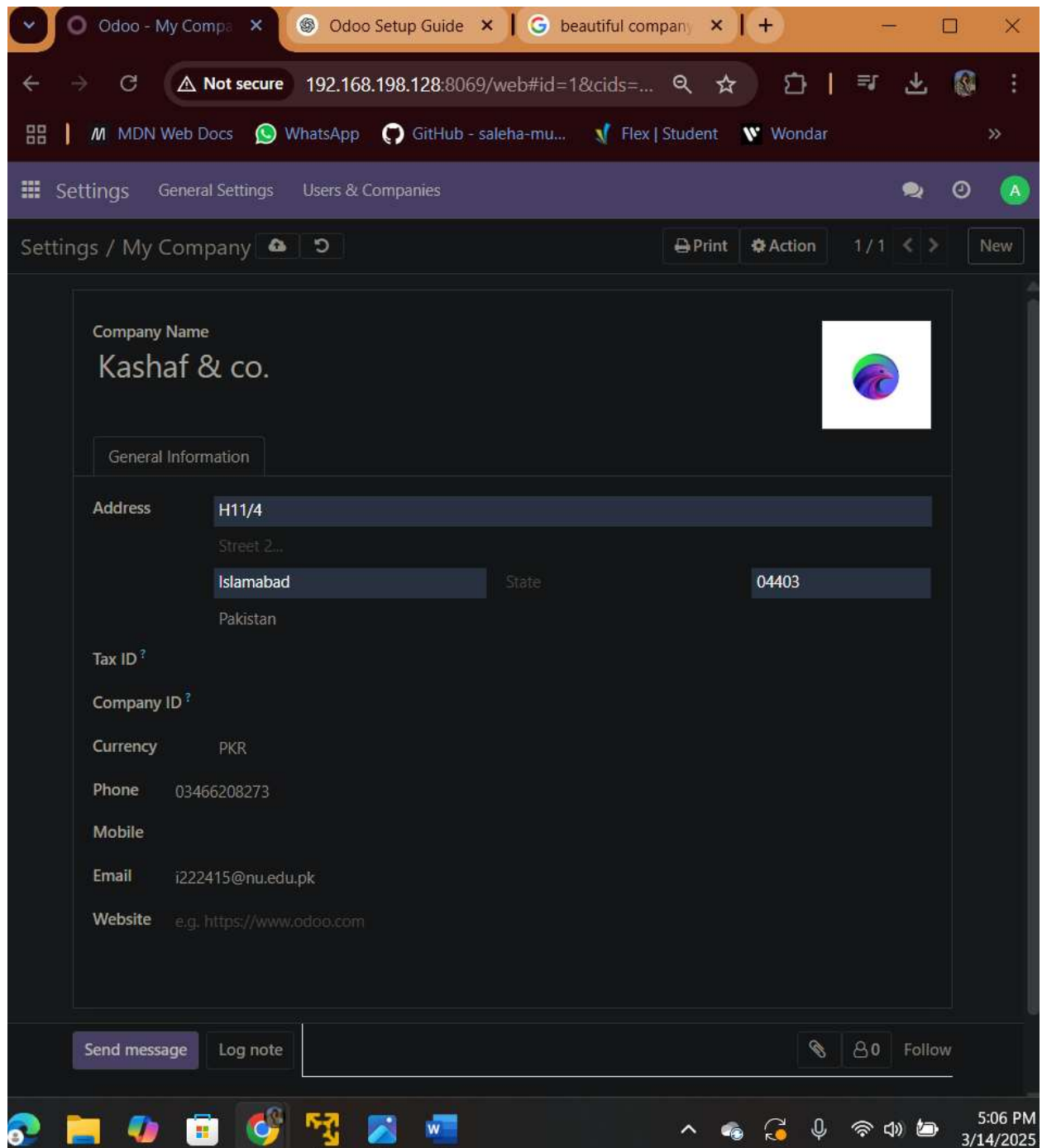
2.4. *Configure basic settings such as company information, currency, language, and timezone.*

- A company named "**Kashaf & Co.**" was created in the system with the necessary details.

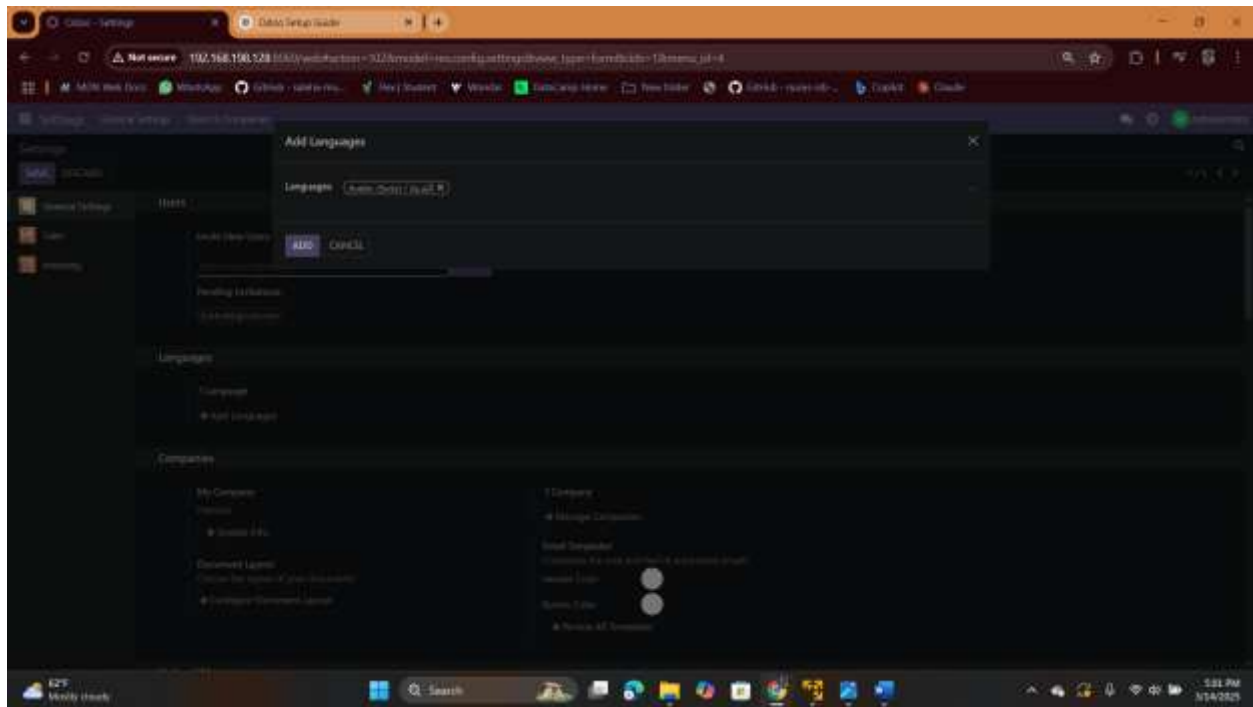




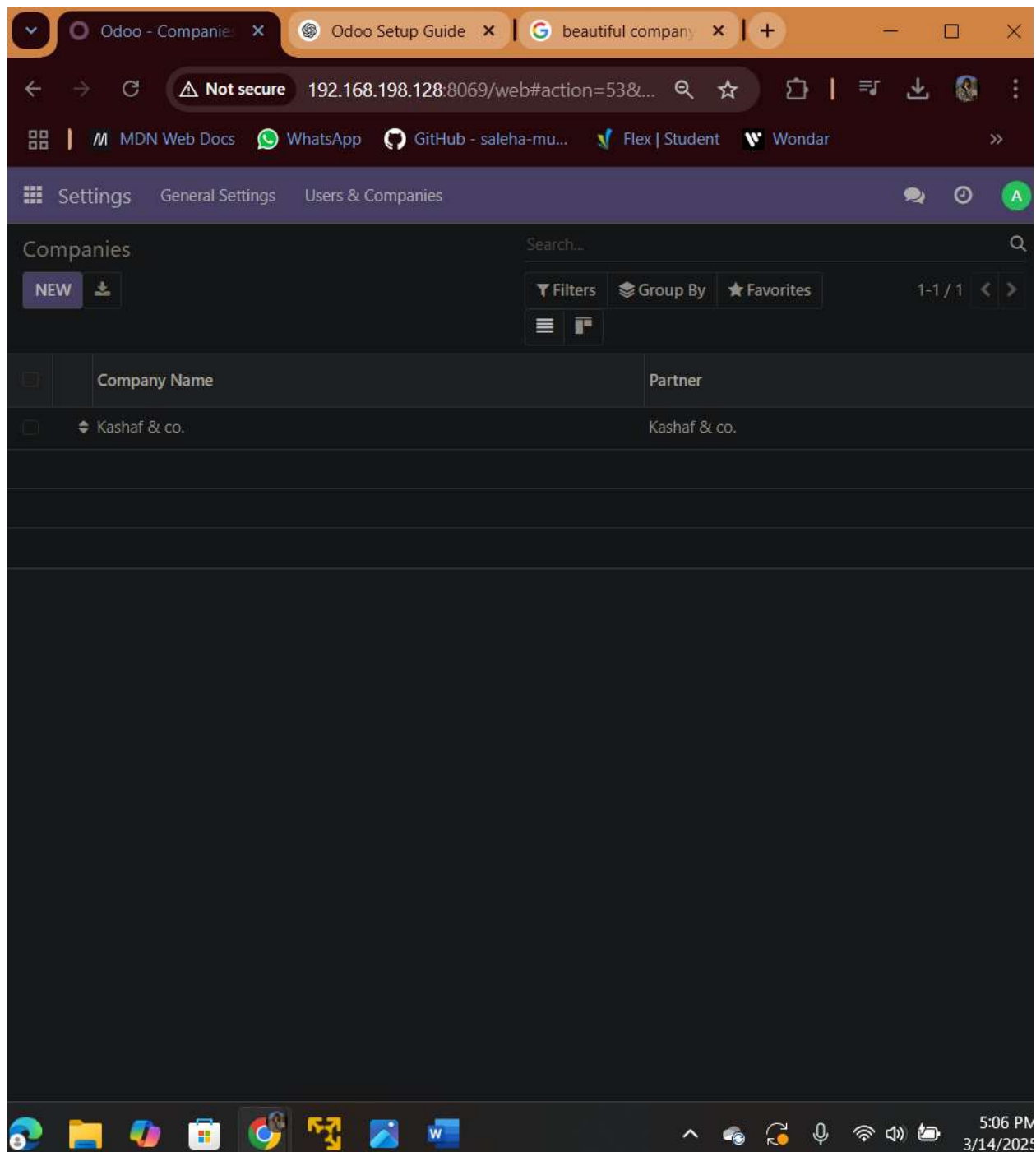
a) Go to Settings → General Settings.



b) Updated the following details



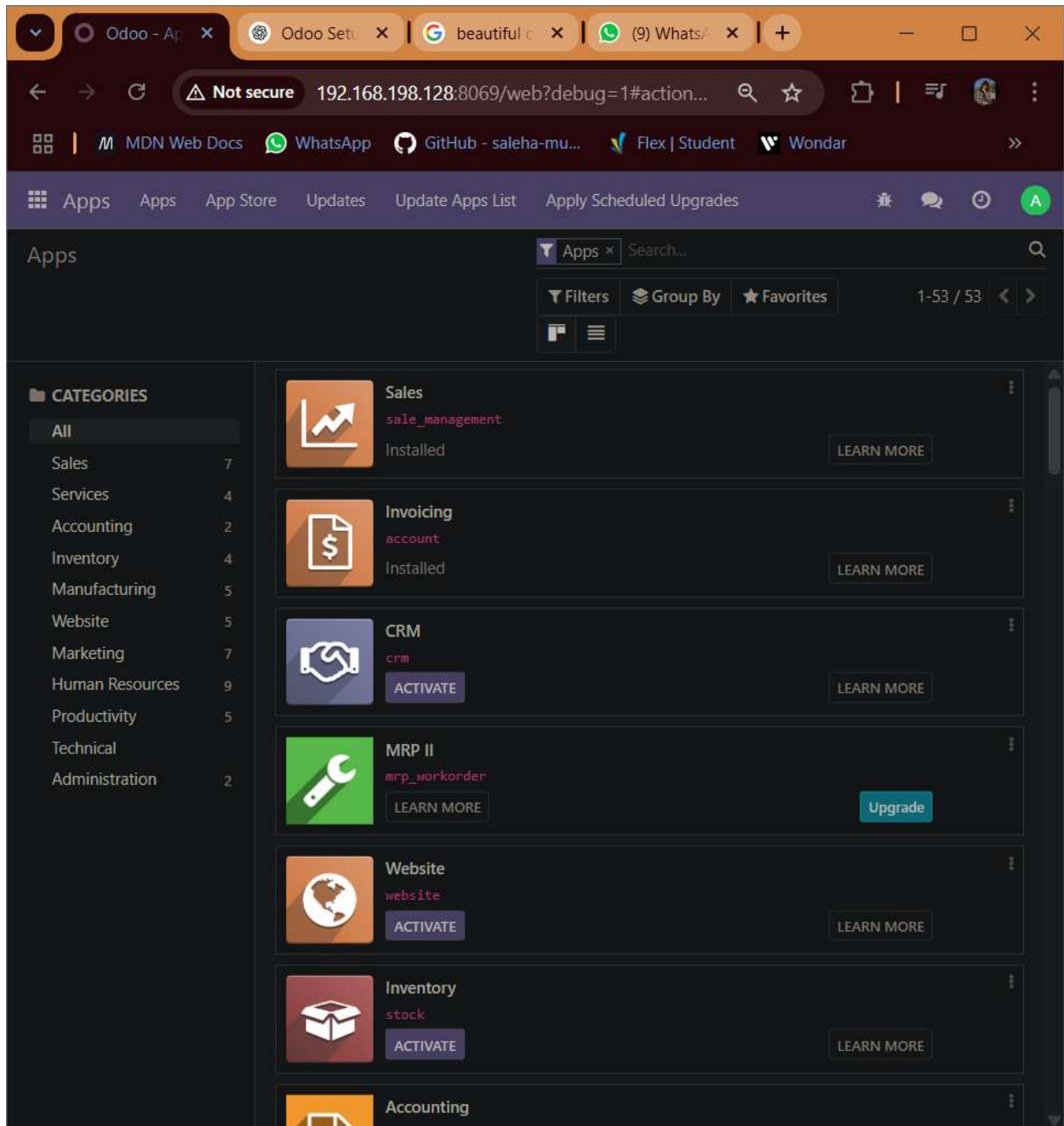
c) Clicked Save to apply changes.



2.5. *Installing Additional Modules*

a) From the **Apps** section, searched for and installed:

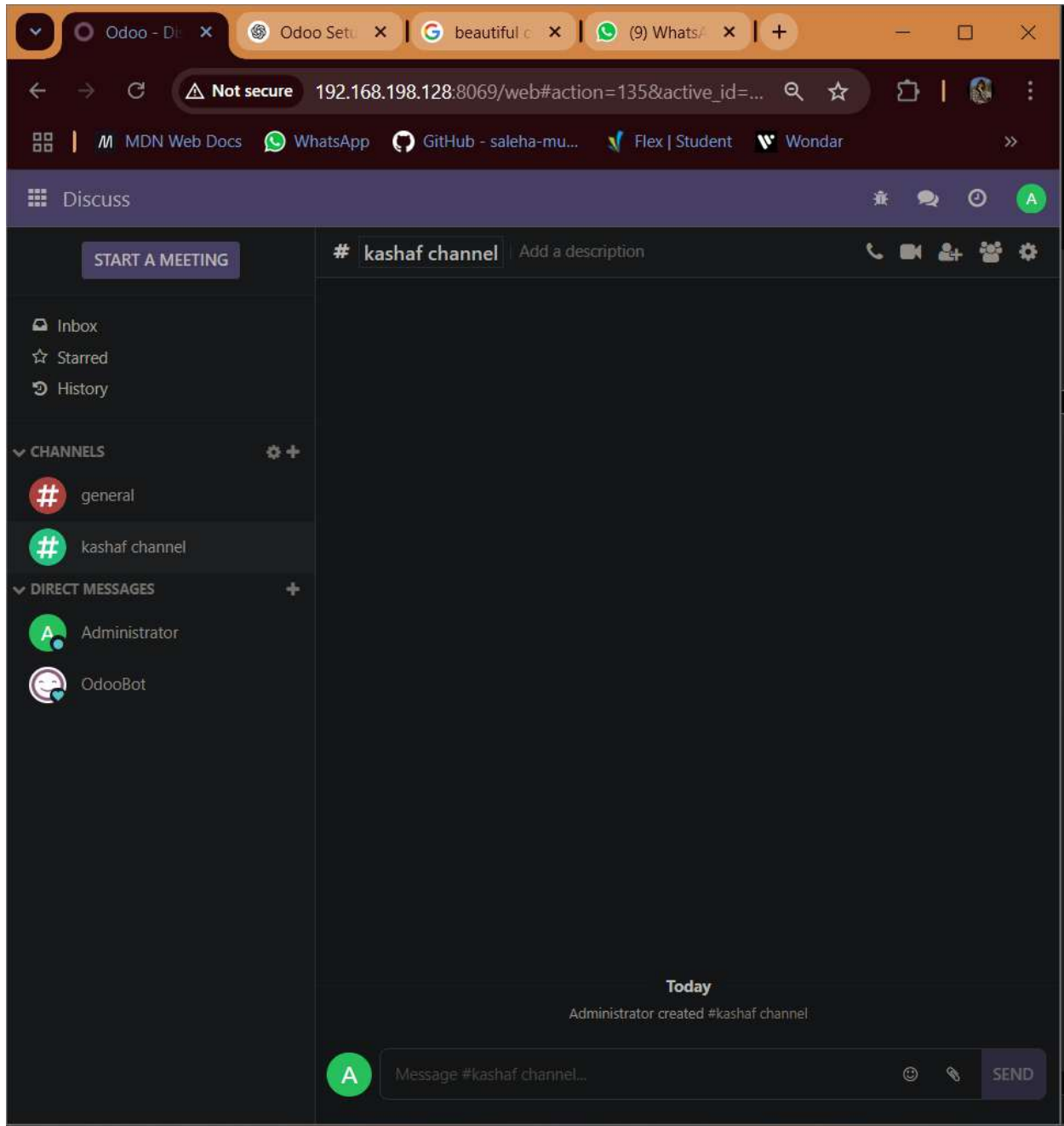
- i. Sales Module
- ii. Inventory Module



b) Verified that the modules appeared on the dashboard.

2.5. Creating a Communication Channel

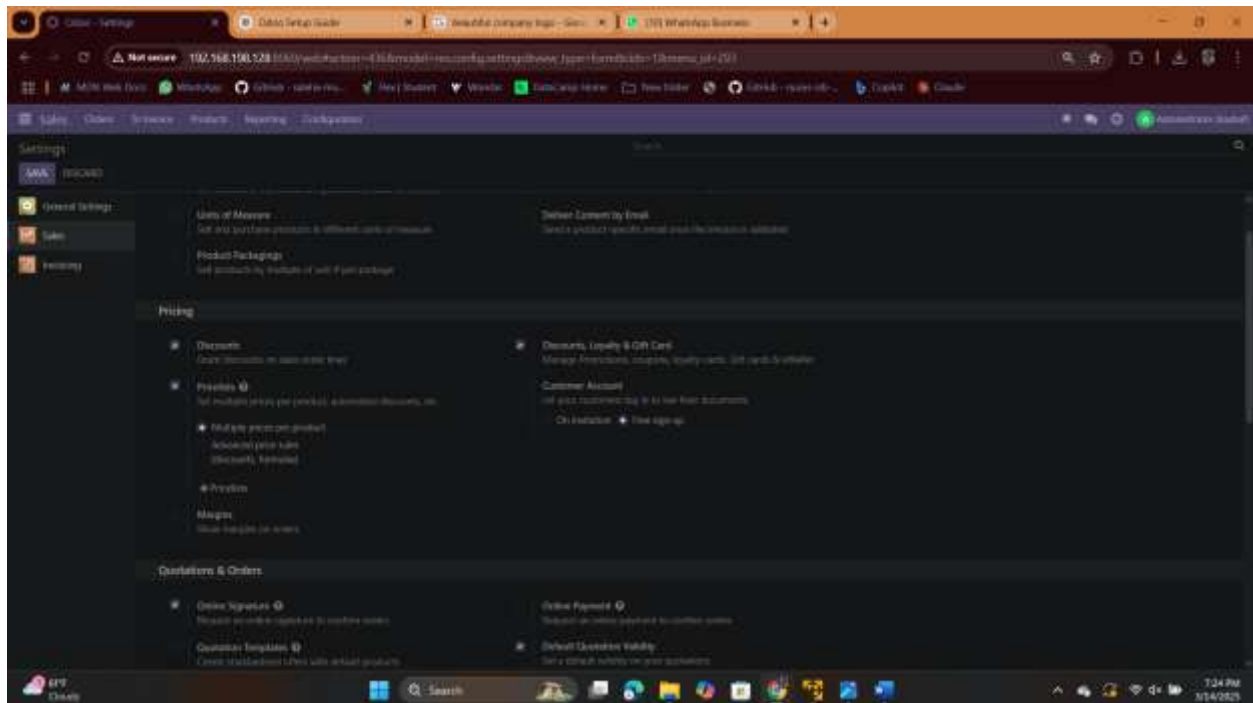
- A new channel named "**Kashaf Channel**" was created for internal discussions.



3. Advanced Configuration & Customization

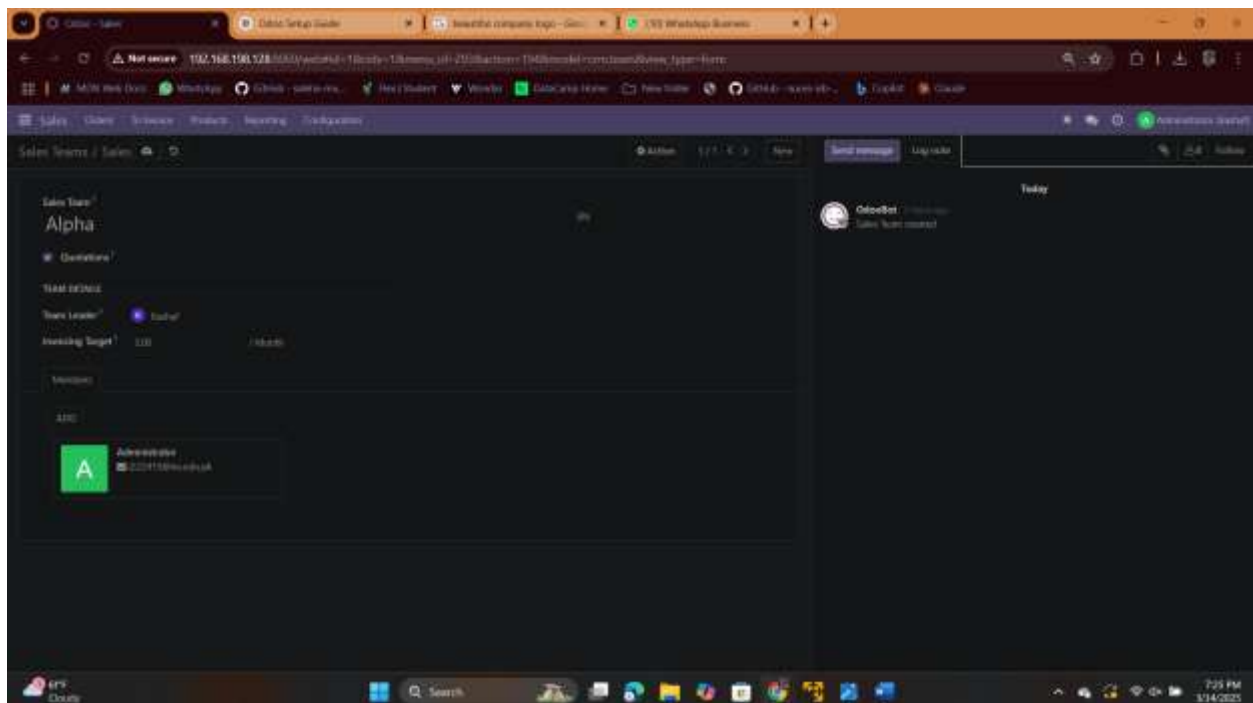
3.1. Exploring Sales and Inventory Modules Configuration options

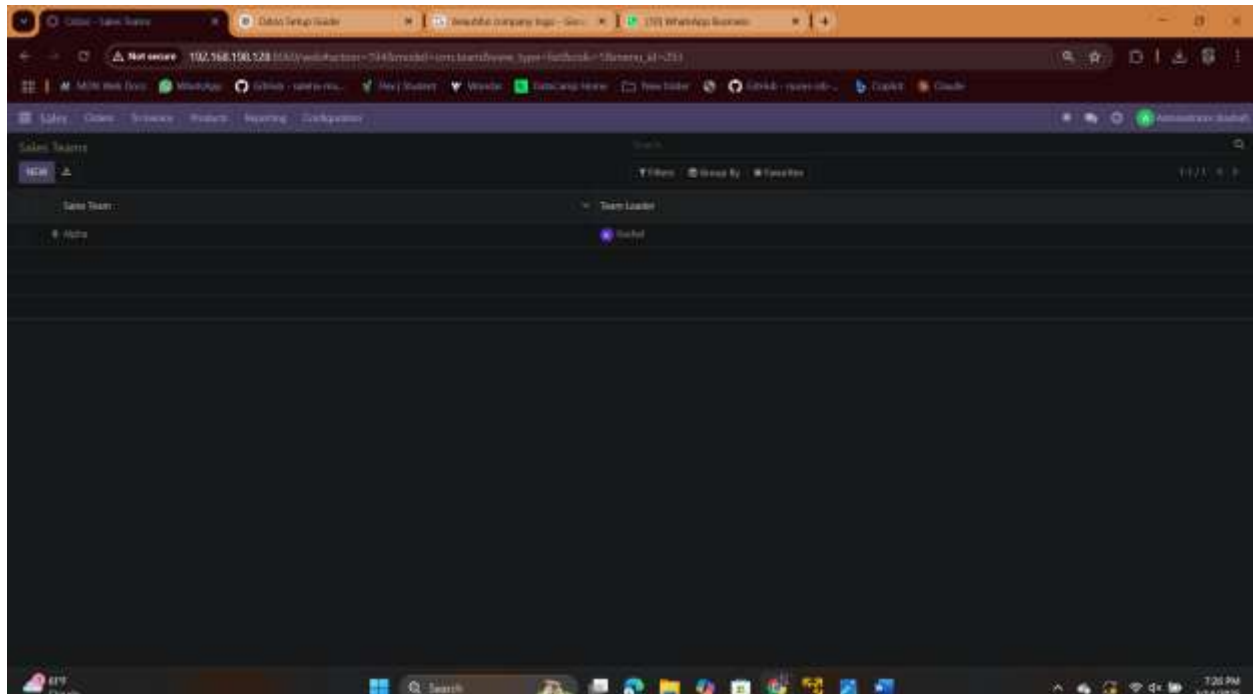
- a) The **Sales and Inventory Modules** were chosen for customization.



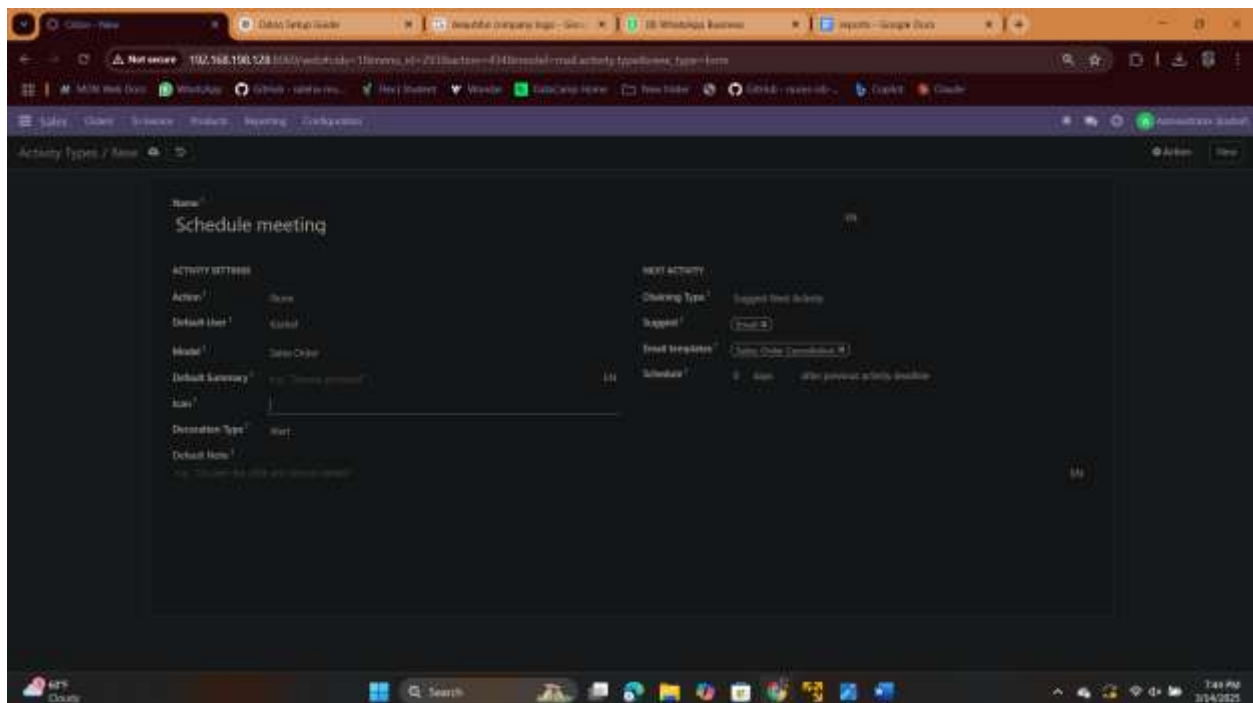
b) Key configurations in the Sales Module:

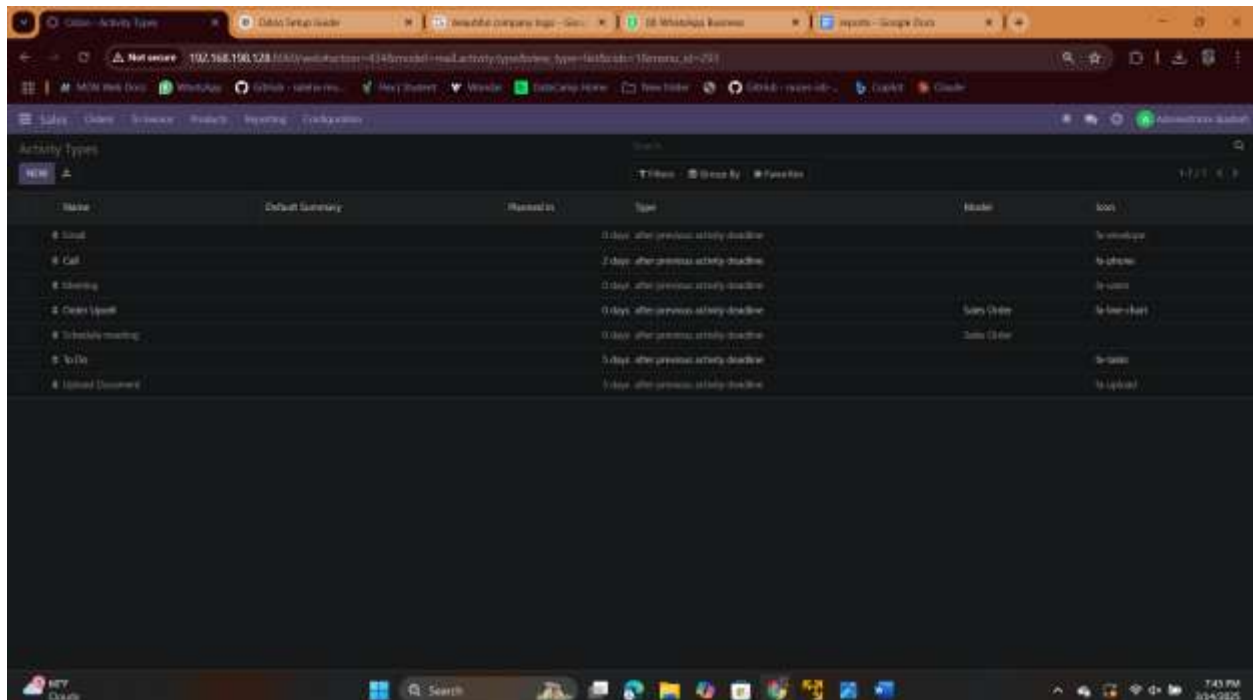
- i. Created a new Sales Team (Alpha) under Configurations → Sales Teams.





ii. Configured a new **Activity Type** in Sales settings.





3.2. *Customize the chosen module by adding custom fields, modifying workflows, or creating new reports.*

3.2.1 Adding a Custom Field

a) Navigated to Settings → Technical → Fields.

Odoo - Newbeautiful companyreports - Google

Not secure192.168.198.128:8069/web#cids=1&menu_id...MDN Web DocsWhatsAppGitHub - saleha-mu...Flex | StudentWondar

SettingsGeneral SettingsUsers & CompaniesTranslationsTechnical

Fields / NewNew

Field Name?x_abc

Field Label?abcEN

Model?Account

Field Type?binary

Field Help?EN

PropertiesAccess RightsMiscellaneous

BASE PROPERTIES

Required?☐

Readonly?☐

Stored?☒

Indexed?☐

Copied?☒

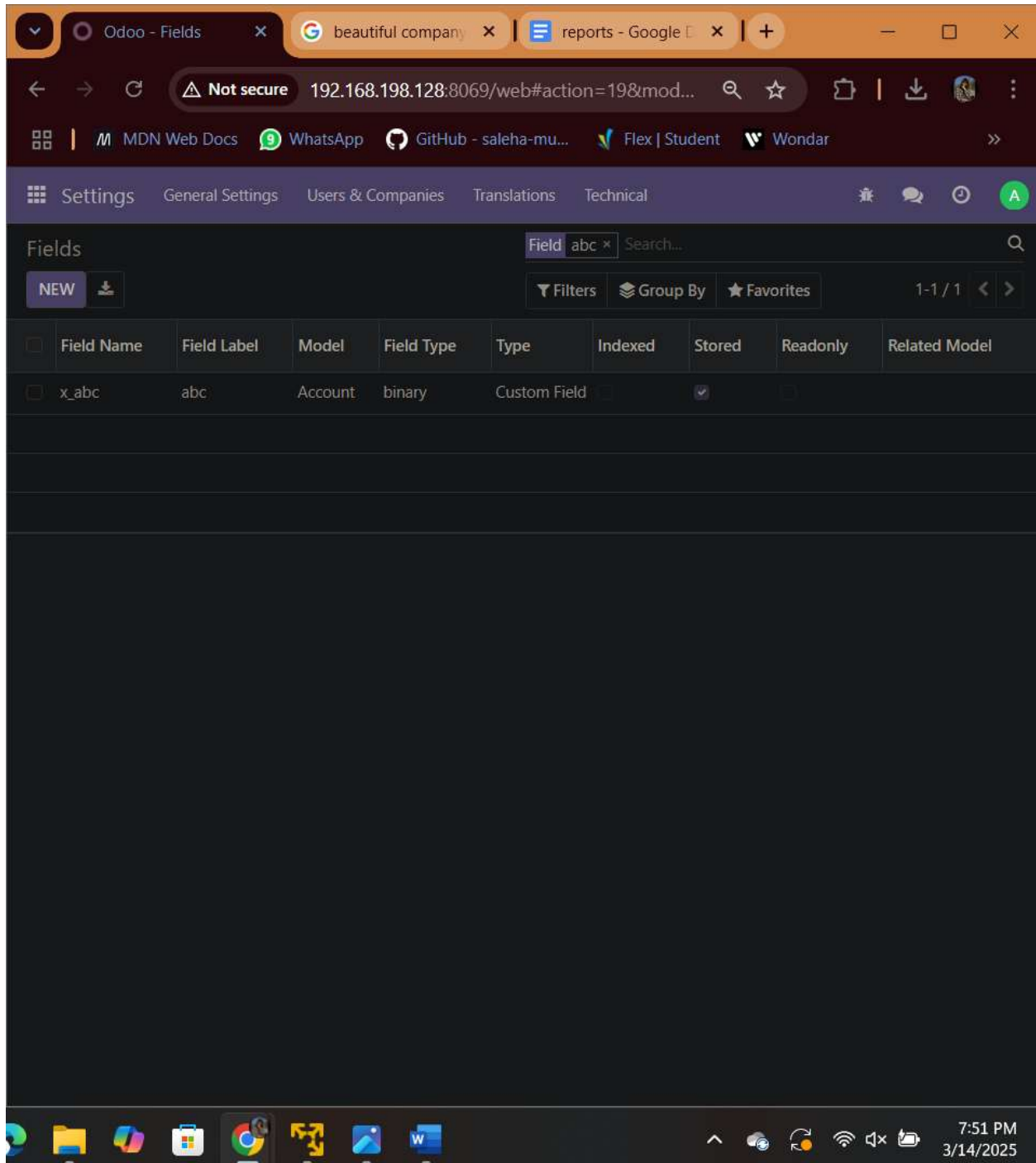
ADVANCED PROPERTIES

Related Field?

Dependencies?

Compute?1

How to define a computed field

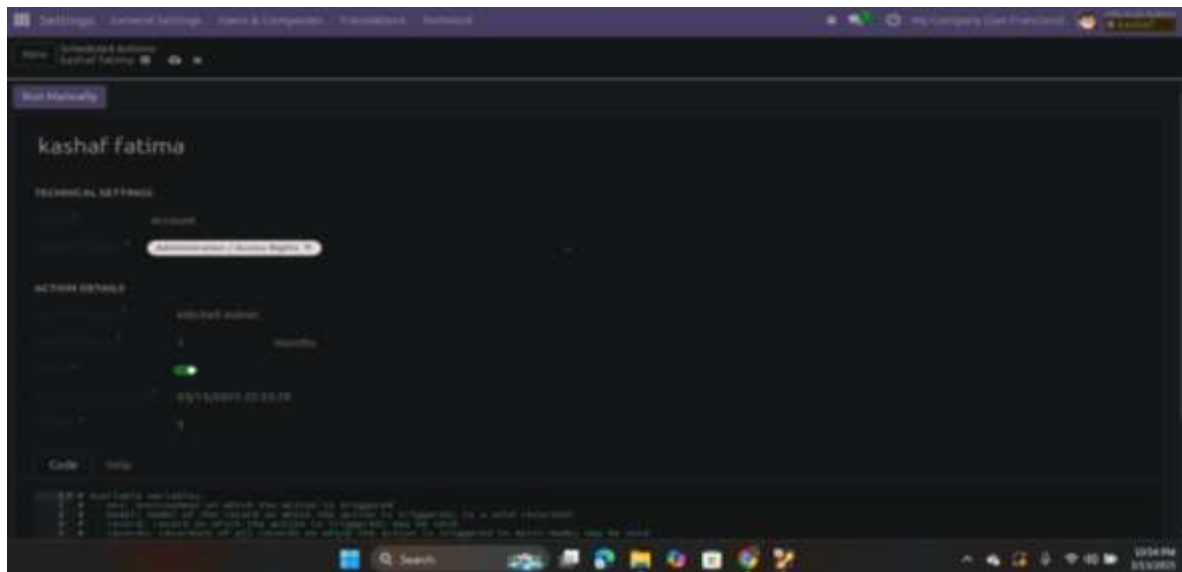


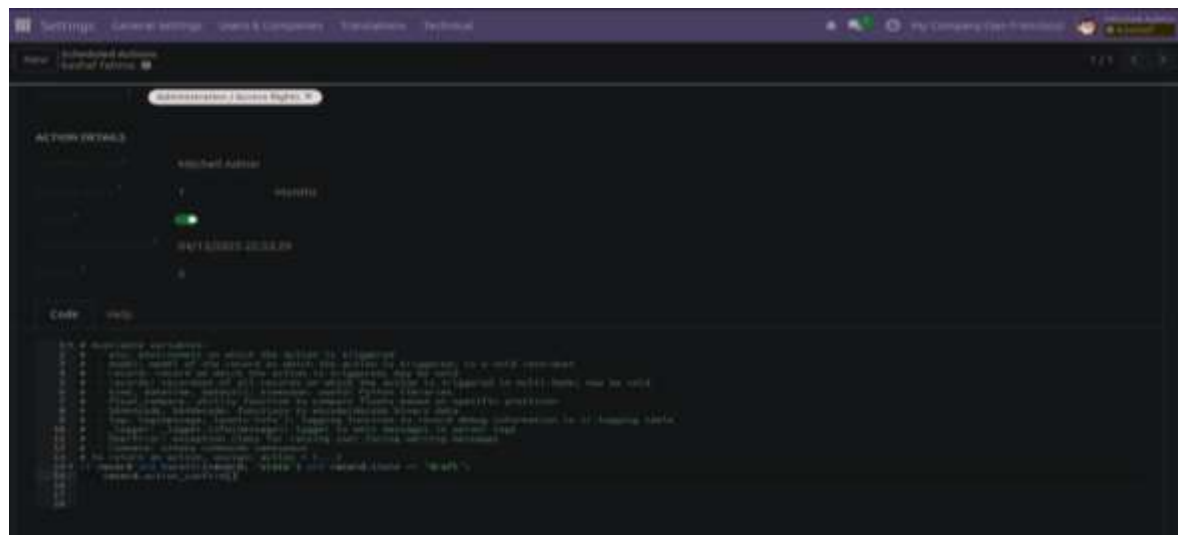
- b) Clicked Create, selected the appropriate module, and added a custom field.

3.2.2 Adding a Custom Field Modifying a Workflow

- a) Navigate to Scheduled Actions:
 - Go to **Settings > Technical > Automation > Scheduled Actions**
- b) Create a New Scheduled Action:
 - Click **Create**
- c) Enter the Required Details:
 - **Action Name:** Auto Confirm Sales Order
 - **Model:** Sales Order (sale.order)
 - **Trigger:** On Creation
 - **Action:** Execute Python Code
- d) Enter the Python Code:

```
if record and record.state == 'draft':  
    record.action_confirm()
```
- e) Save and Test the Workflow:
 - Click Save
 - Run the action manually to test its functionality

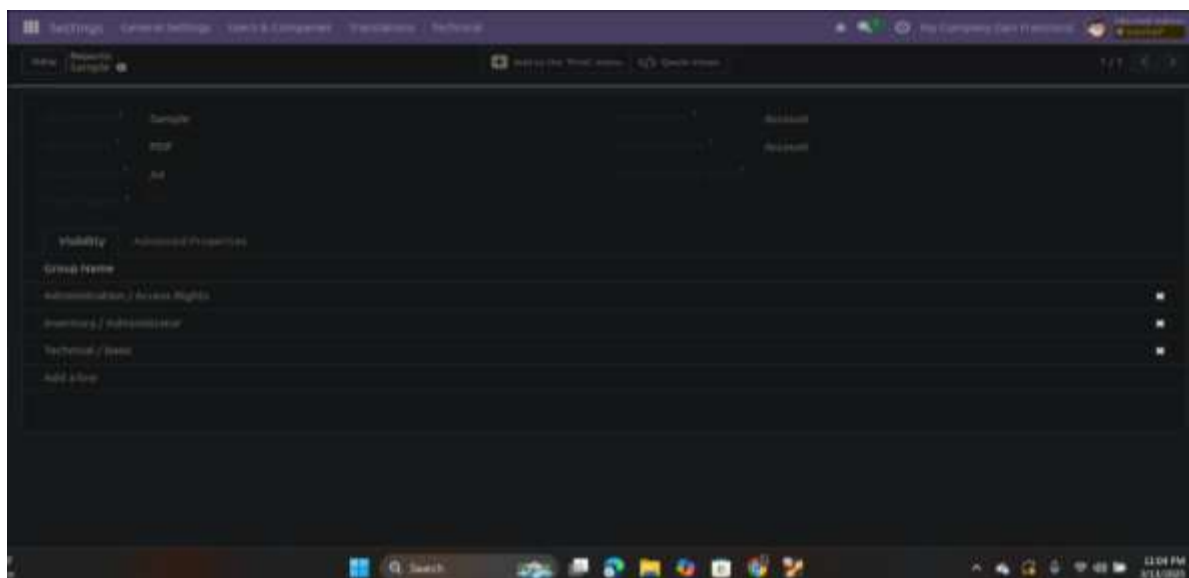


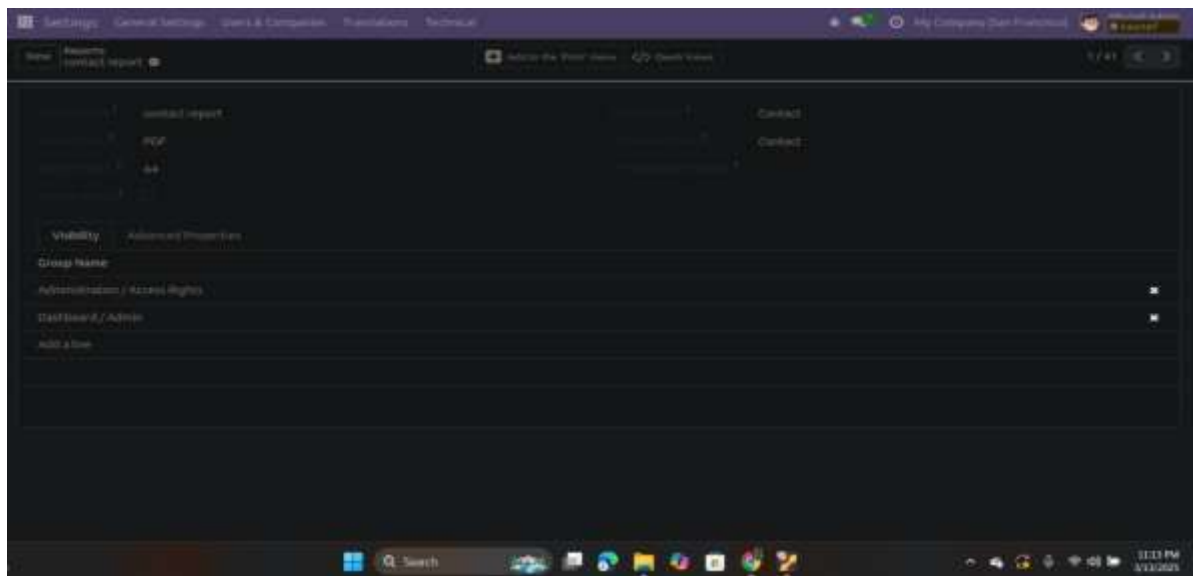
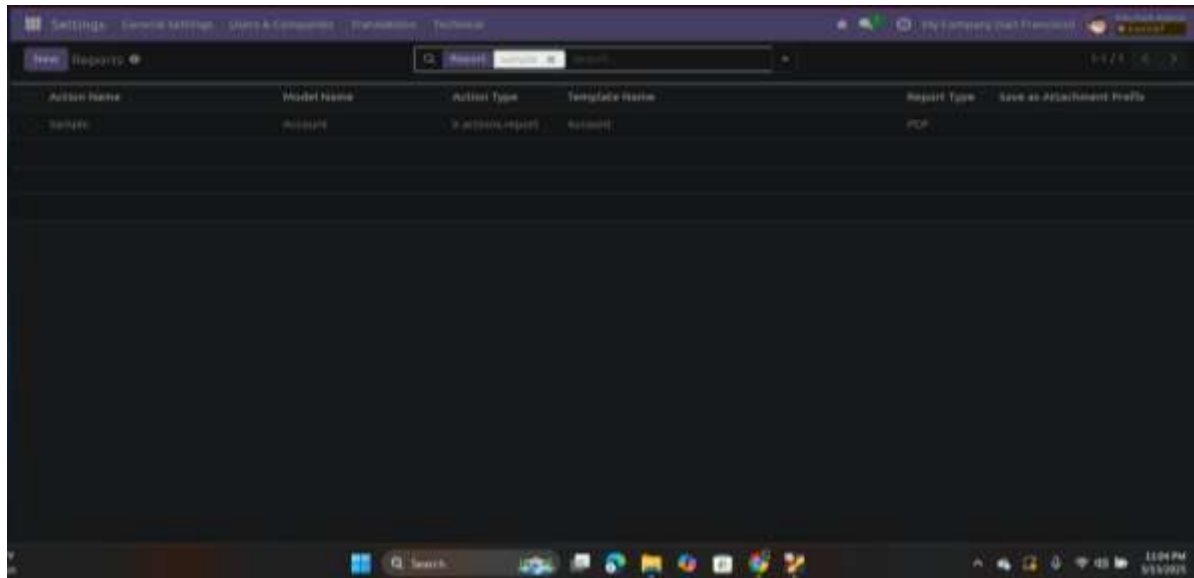


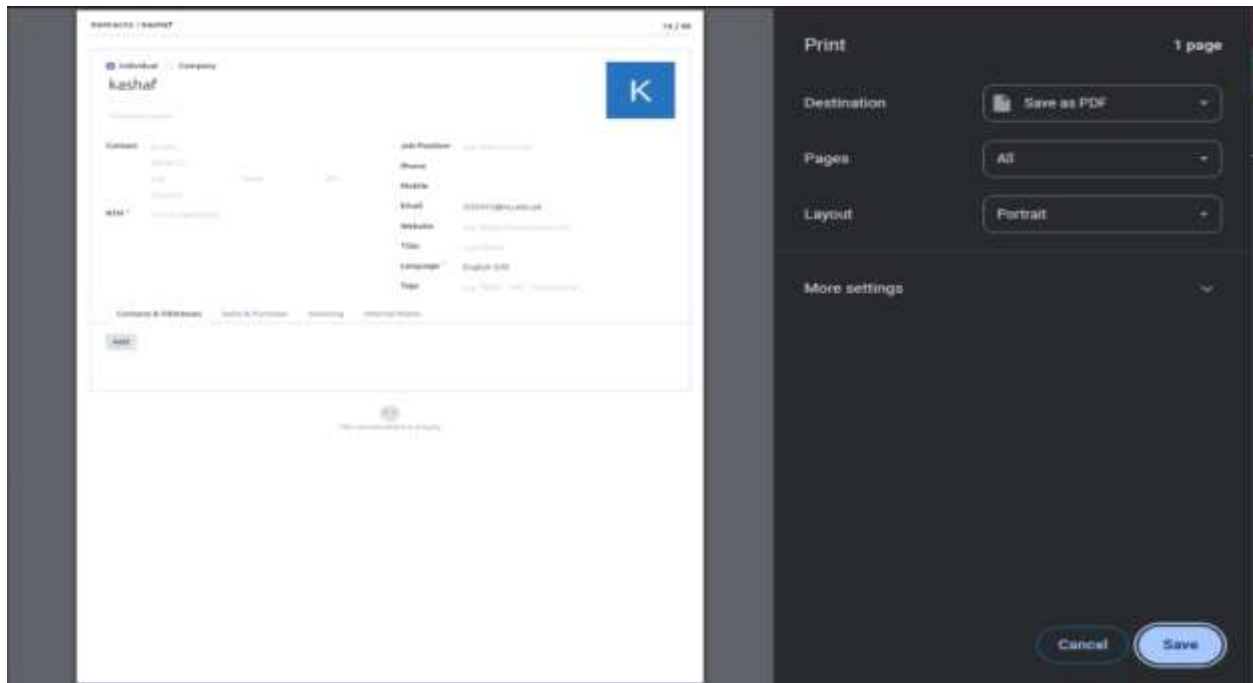
Settings - General Settings - Users & Companies - Translations - Technical						
Scheduled Actions						
Priority	Action Name	Module	Next Execution Date	Interval	Interval Unit	Active
1	Account: Post draft entries with auto_post enabled and accounting date up to today	Journal Entry	03/14/2025 07:00:07	1	Days	on
2	Reop: Auto-revision internal data	Automatic revision	03/14/2025 00:01:32	1	Days	on
4	Reop: Portal users Deletion	Users Deletion Request	03/14/2025 00:01:32	1	Days	on
5	Opport: Drafts	Drafts	03/14/2025 00:01:30	1	Days	on
5	Channel: Channel member update	Channel Member	03/14/2025 00:00:00	1	Days	on
5	Disclose: User settings update	User Settings	03/14/2025 00:00:00	1	Days	on
5	Account: Reconcile	Account	04/11/2025 22:00:00	1	Months	on
6	Mail: Email Queue Manager	Outgoing Mail	03/14/2025 00:00:00	1	Hours	on
6	Mail: Post scheduled messages	Scheduled Message	03/14/2025 00:00:00	1	Days	on
6	Mail: send web push notification	Push Notifications	03/14/2025 00:00:00	1	Days	on
6	Notification: Delete notifications older than 6 month	Message Notifications	03/14/2025 00:00:00	1	Days	on
6	Notification: Notify scheduled messages	Scheduled Messages	03/14/2025 00:00:00	1	Hours	on
6	Partner: Autocomplete Sync with remote DB	Partner Autocomplete Sync	03/14/2025 00:00:00	1	Hours	on
6	Procurement: run schedule	Procurement Group	03/14/2025 00:00:00	1	Days	on
7	Send invoices automatically	Journal Entry	03/14/2025 00:00:00	1	Days	on

3.2.3 Creating Custom Reports

- Select Settings > Technical > Reporting > Reports > Create New Report.
- Choose the module (e.g., Sales Orders).
- Add necessary fields (Order Reference, Customer, Total Amount).
- Save and test by printing a report.







3.3. Test Cases & Results

Test Case 1: Creating and Configuring a Sales Team

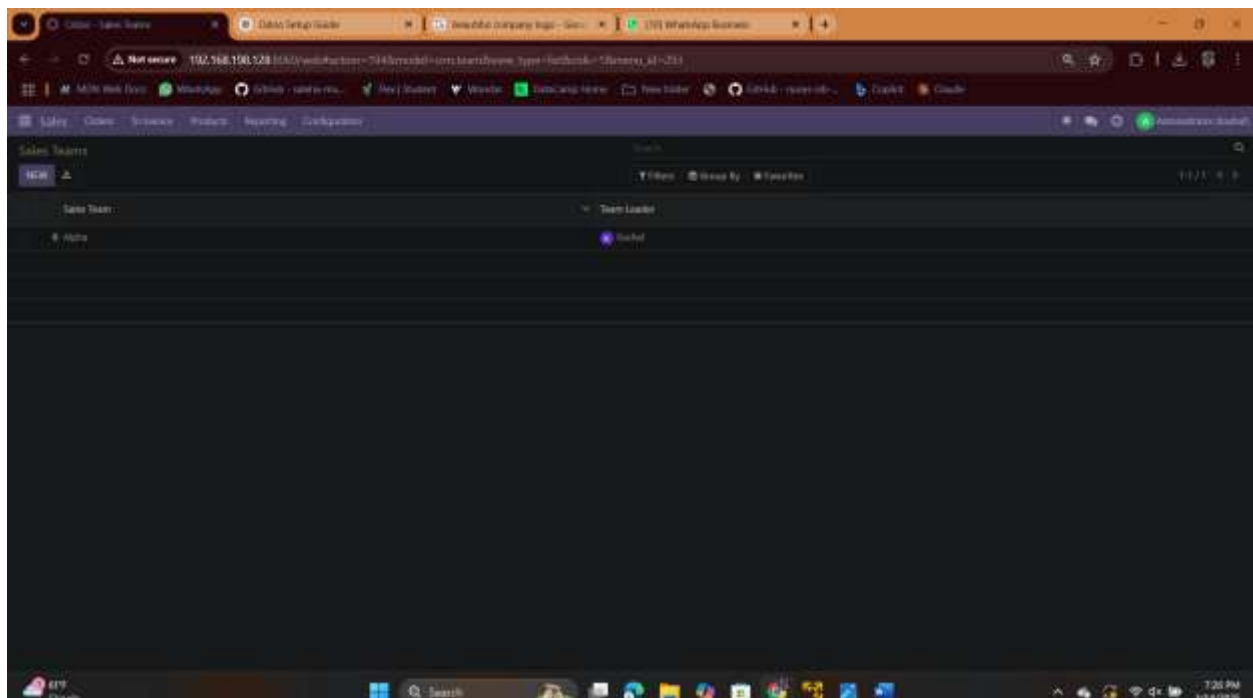
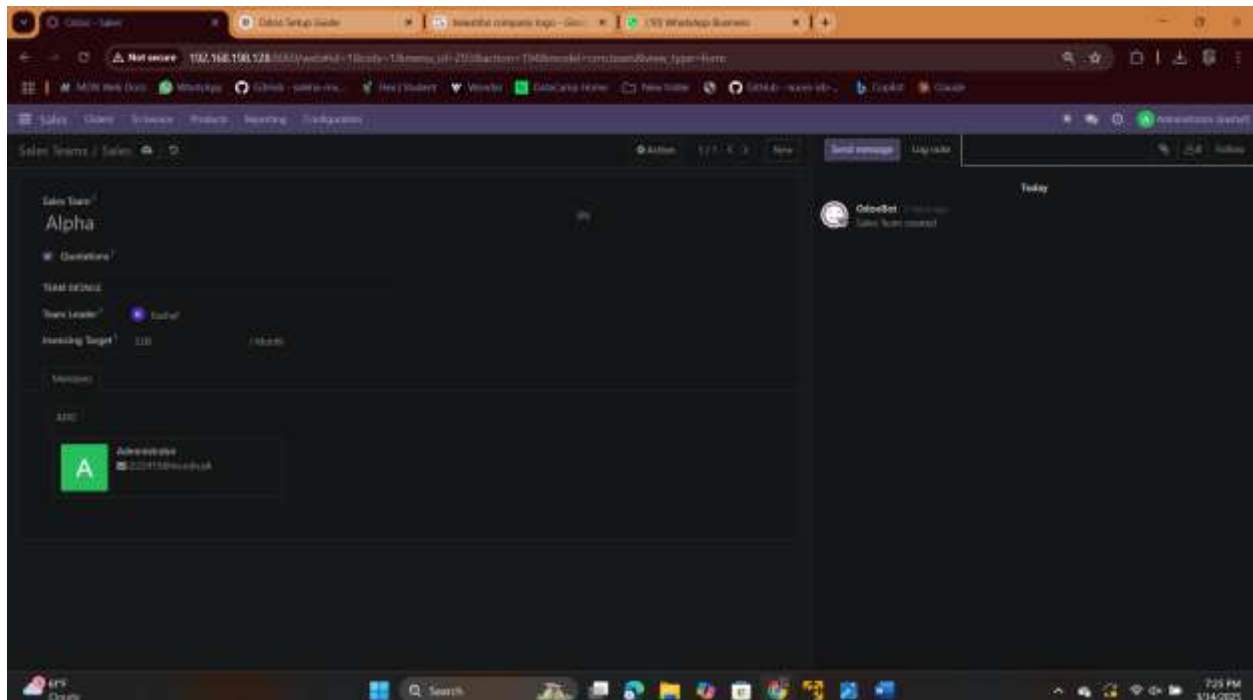
Test Steps:

1. Navigate to **Sales → Configuration → Sales Teams**.
2. Click **Create** and enter the following details:
 - Sales Team Name: **Alpha**
 - Assigned Members: **At least one salesperson**
3. Click **Save** and verify that the team appears in the list.

Expected Outcome:

- The "Alpha" sales team is successfully created and visible in the sales team list.

Test Result: Passed



Test Case 2: Creating a Customer Invoice

Test Steps:

1. Navigate to **Sales → Orders → Quotations**.

2. Click **Create**, select **Customer (Kashaf)**, add **Products (Books - 20 units)**, and save.
3. Click **Confirm** to convert it into a Sales Order.
4. Navigate to **Invoicing → Create Invoice** and validate.

Expected Outcome:

- The quotation converts into a sales order.
- An invoice is generated and linked to the customer.

Test Result: Passed

The screenshot displays the Odoo 16.0 web interface. The top navigation bar shows the following menu items: Sales, Orders, To Invoice, Products, Reporting, and Configuration. The breadcrumb trail indicates the current location: Quotations / S00001 / INV/2025/00001. The invoice is titled "Customer Invoice" and is marked as "PAID". The invoice details are as follows:

Field	Value
Customer	Kashaf
Invoice Date	03/14/2025
Payment Reference	INV/2025/00001
Due Date	03/14/2025
Currency	PKR

The invoice lines table is as follows:

Product	Label	Quantity	Price	Taxes	Subtotal
Book	Book	20.00	0.00		0.00 Rs.
Total: 0.00 Rs.					
Amount Due: 0.00 Rs.					

The bottom status bar shows the weather as 61°F Cloudy and a search bar.

Odoo - Invoices

Not secure 192.168.198.128:8069/web#action=257&mo...

MDN Web DocsWhatsAppGitHub - saleha-mu...Flex | StudentWondar

InvoicingCustomersVendorsReportingConfiguration

Invoices

NEWUPLOAD

Search...

FiltersGroup ByFavorites

1-1 / 1

Company Data

Set your company's data for documents header/footer.

Let's start!

Bank Account

Connect your financial accounts in seconds.

Step Completed!

Invoice Layout

Customize the look of your invoices.

Customize

Create In

Create your fir

First invo

<input type="checkbox"/>	Number	Custom...	Invoice ...	Due Da...	Activiti...	Tax Excl...	Total	Total in ...	Paymen...	Stat
<input type="checkbox"/>	INV/2025/0...	Kashaf		Today		20.00 Rs.	23.40 Rs.	23.40 Rs.	Not Paid	Dra
						20.00 Rs.	23.40 Rs.			

4:45 PM

3/14/2025