



Configuration Report

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

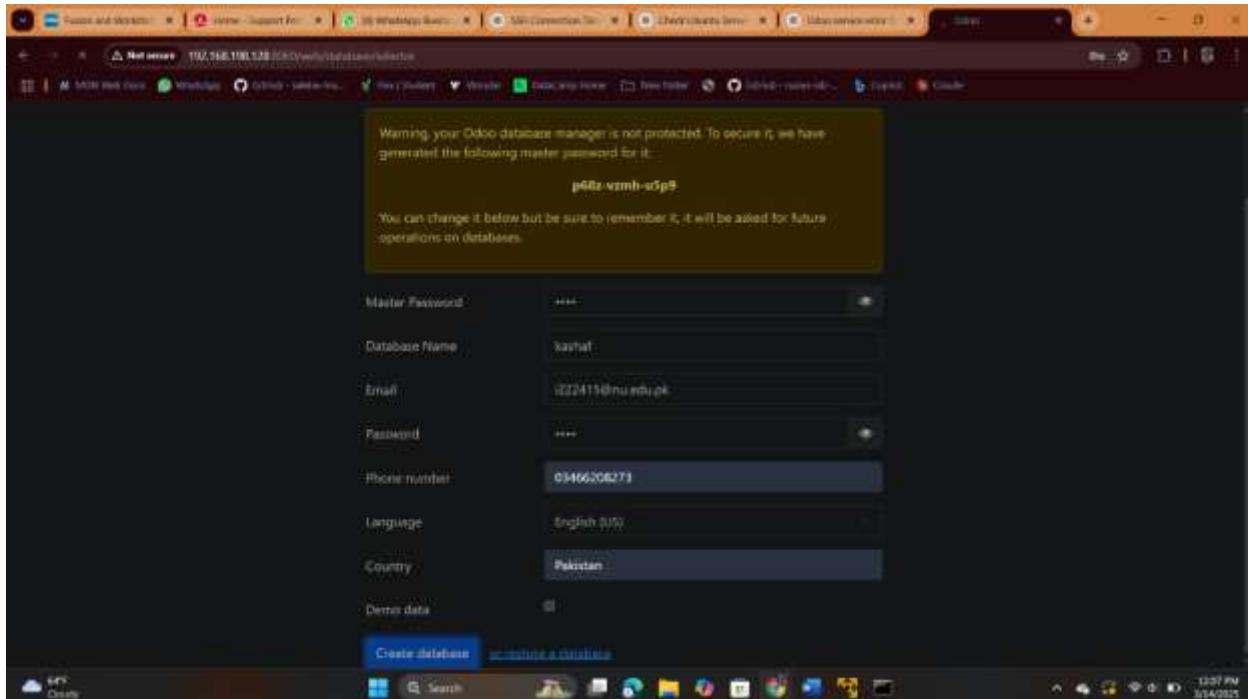
2.1. *Logging into Odoo Web Interface*

- 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

- Enter the credentials



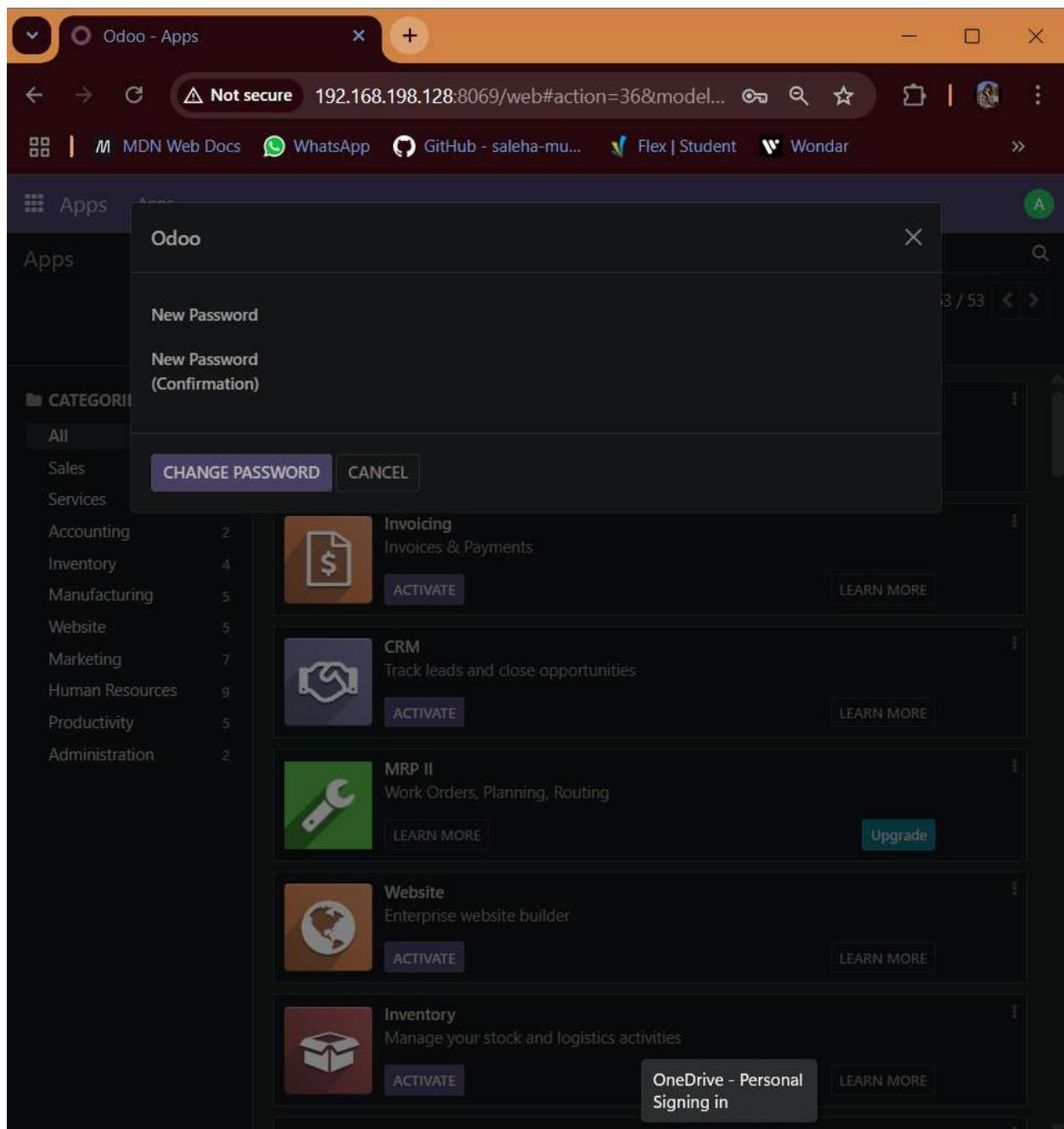
- Click "Create Database" to access the dashboard.



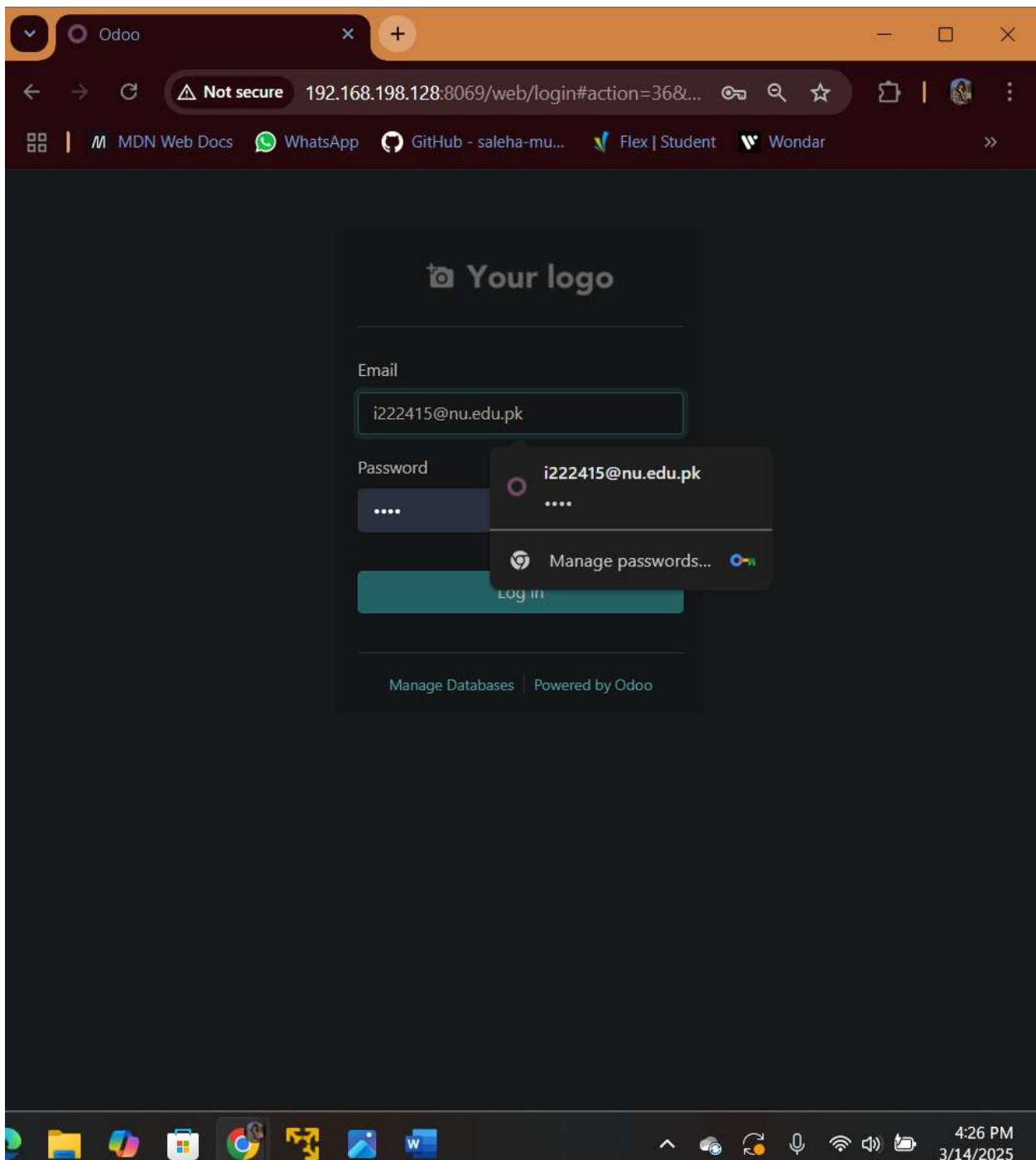
2.2. Change the default password and create a new user account with administrative privileges.

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.

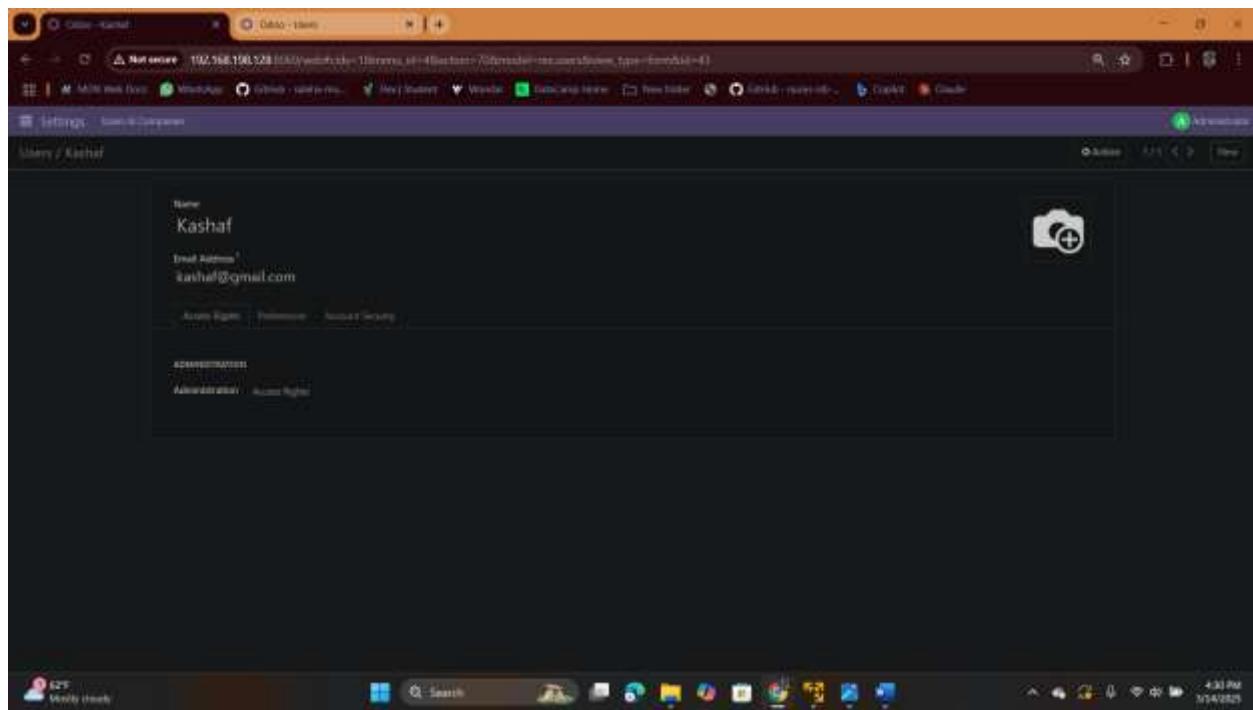


c) Log out and log back in to verify the change.



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.



The screenshot shows a web browser window with the title 'Odoo - Users'. The address bar indicates the URL is '192.168.198.128:8069/web#action=70&model=res...'. The page displays a list of users under the 'Internal Users' filter. The columns are 'Name', 'Login', 'Language', and 'Latest authentication'. There are two entries: 'Administrator' (login i222415@nu.edu.pk, language English (US), latest auth 03/14/2025 16:26:58) and 'Kashaf' (login kashaf@gmail.com, language English (US)). The browser's toolbar at the bottom includes icons for file operations, search, and refresh, along with system status indicators like battery level and signal strength.

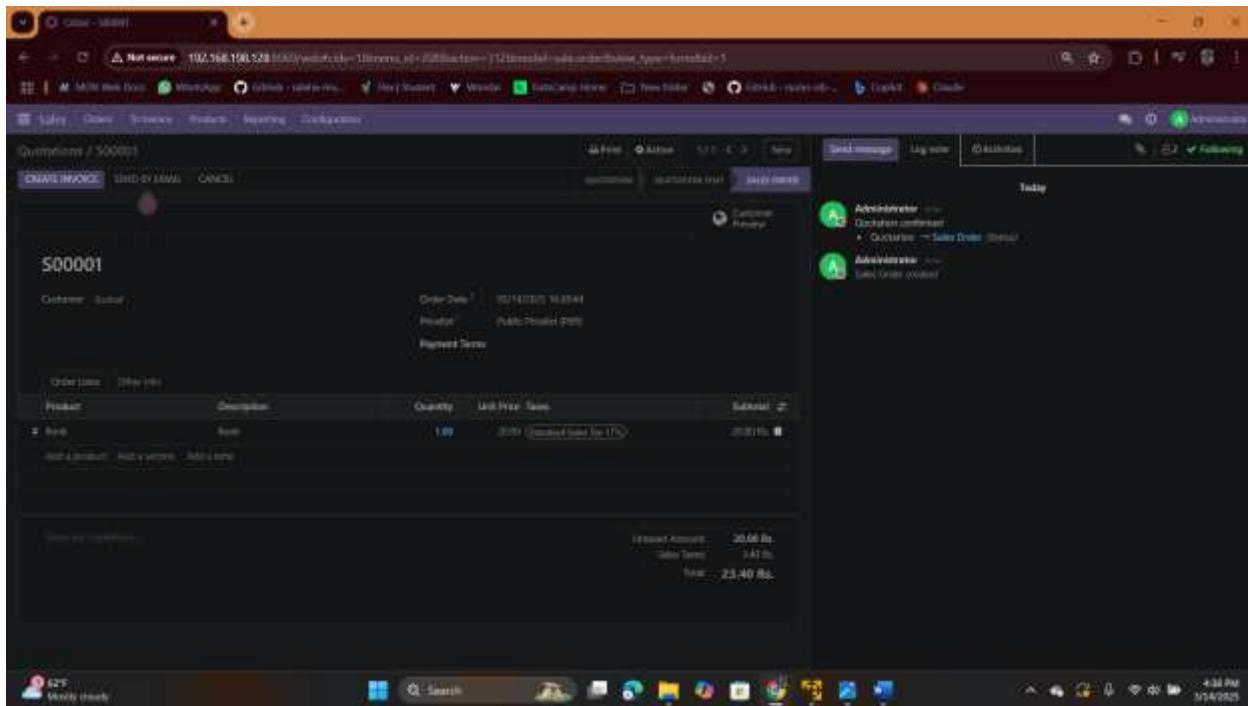
Name	Login	Language	Latest authentication
Administrator	i222415@nu.edu.pk	English (US)	03/14/2025 16:26:58
Kashaf	kashaf@gmail.com	English (US)	

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

- 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.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Odoo - IN' and displays the Odoo Sales module. The page is for Quotations / S00001 / INV/2025/00001. The status bar at the top right shows 'DRAFT' and 'POSTED'. A green diagonal banner across the middle of the page indicates the invoice is PAID. The customer information is listed as Kashaf. The invoice date is 03/14/2025. The payment reference is INV/2025/00001. The due date is also 03/14/2025. The currency is PKR. The invoice lines table shows one item: Book at 20.00 units, resulting in a subtotal of 0.00 Rs. The total amount due is also 0.00 Rs. At the bottom left, there is a weather widget showing 61°F and Cloudy. The bottom right features a search bar and other system icons.

Customer Invoice
INV/2025/00001

Customer ? Kashaf

Invoice Date ? 03/14/2025

Payment Reference ? INV/2025/00001

Due Date ? 03/14/2025

Currency ? PKR

Invoice Lines Other Info

Product	Label	Quantity	Price	Taxes	Subtotal
Book	Book	20.00	0.00		0.00 Rs.

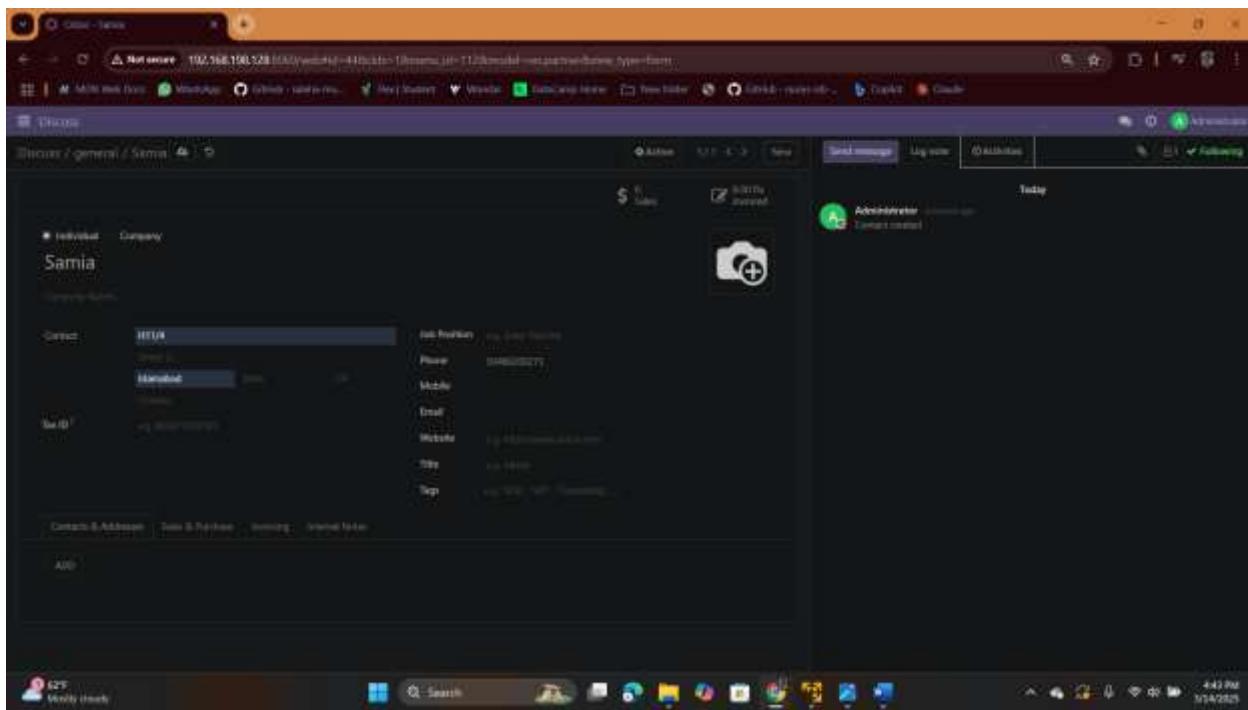
Total: 0.00 Rs.

Amount Due ?: 0.00 Rs.

1 61°F
Cloudy

Search

- 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.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Odoo - Co" and displays the Odoo Companies module at the URL 192.168.198.128:8069/web#action=53&model=res.partner. The browser status bar indicates "Not secure".

The Odoo interface has a dark blue header with navigation links: "Settings", "General Settings", "Users & Companies", "Translations", and "Technical". On the right side of the header is a user profile icon.

The main content area is titled "Companies" and contains a search bar with placeholder text "Search...". Below the search bar are three buttons: "Filters", "Group By", and "Favorites". A page number "1-1 / 1" and navigation arrows are also present.

The data grid displays a single record:

	Company Name	Partner
<input type="checkbox"/>	◆ Kashaf & co.	Kashaf & co.

Odoo - Ka | Odoo Setu | beautiful c | (9) WhatsApp | +

Not secure 192.168.198.128:8069/web#id=1&cids=1&menu_id...

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Settings General Settings Users & Companies Translations Technical

Companies / Kashaf & co.

Print Action 1 / 1 New

Company Name? Kashaf & co.

General Information

Contact? Kashaf & co.

Address? H11/4
Street 2...
Islamabad State 04403
Pakistan

Tax ID?

Company ID?

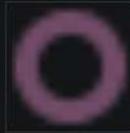
Currency? PKR

Phone? 03466208273

Mobile?

Email? i222415@nu.edu.pk

Website? e.g. https://www.odoo.com

Company Favicon? 

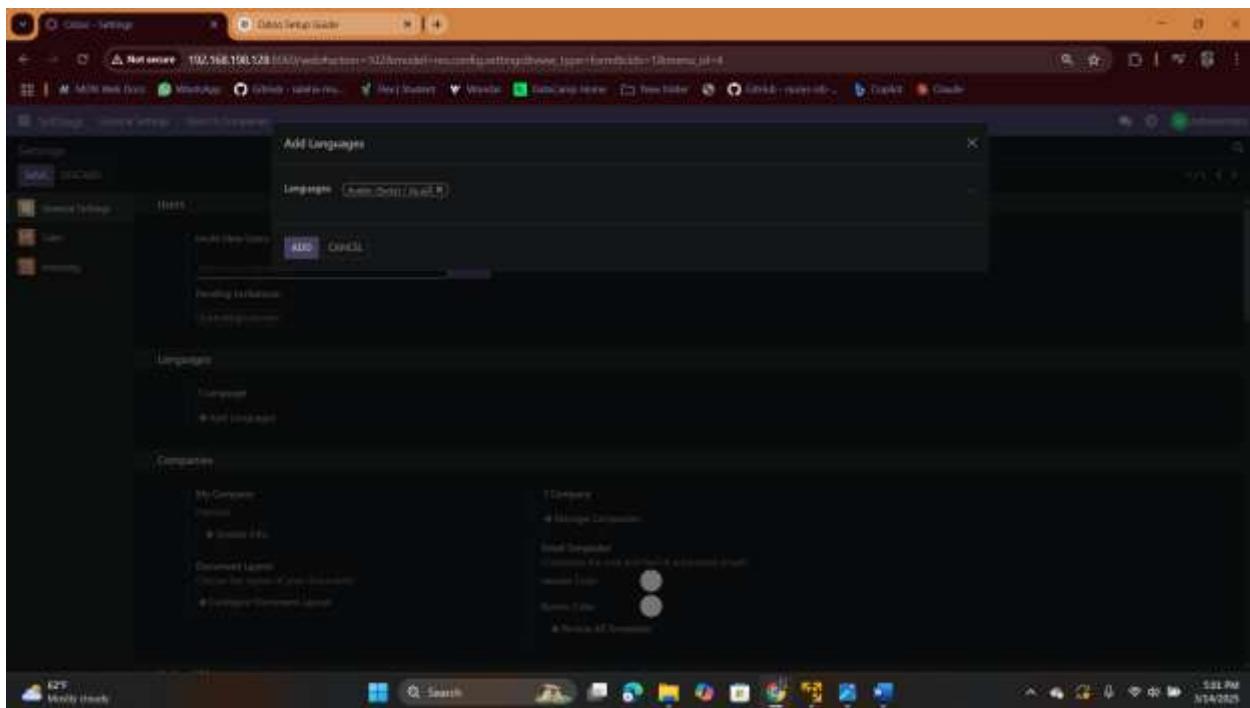
a) Go to Settings → General Settings.

The screenshot shows the Odoo web interface with three tabs open: 'Odoo - My Company' (active), 'Odoo Setup Guide', and 'beautiful company'. The address bar indicates the URL is 192.168.198.128:8069/web#id=1&cids=1. The main content area displays the 'Settings / My Company' page. The company name is 'Kashaf & co.' with a logo. The 'General Information' tab is selected, showing the following details:

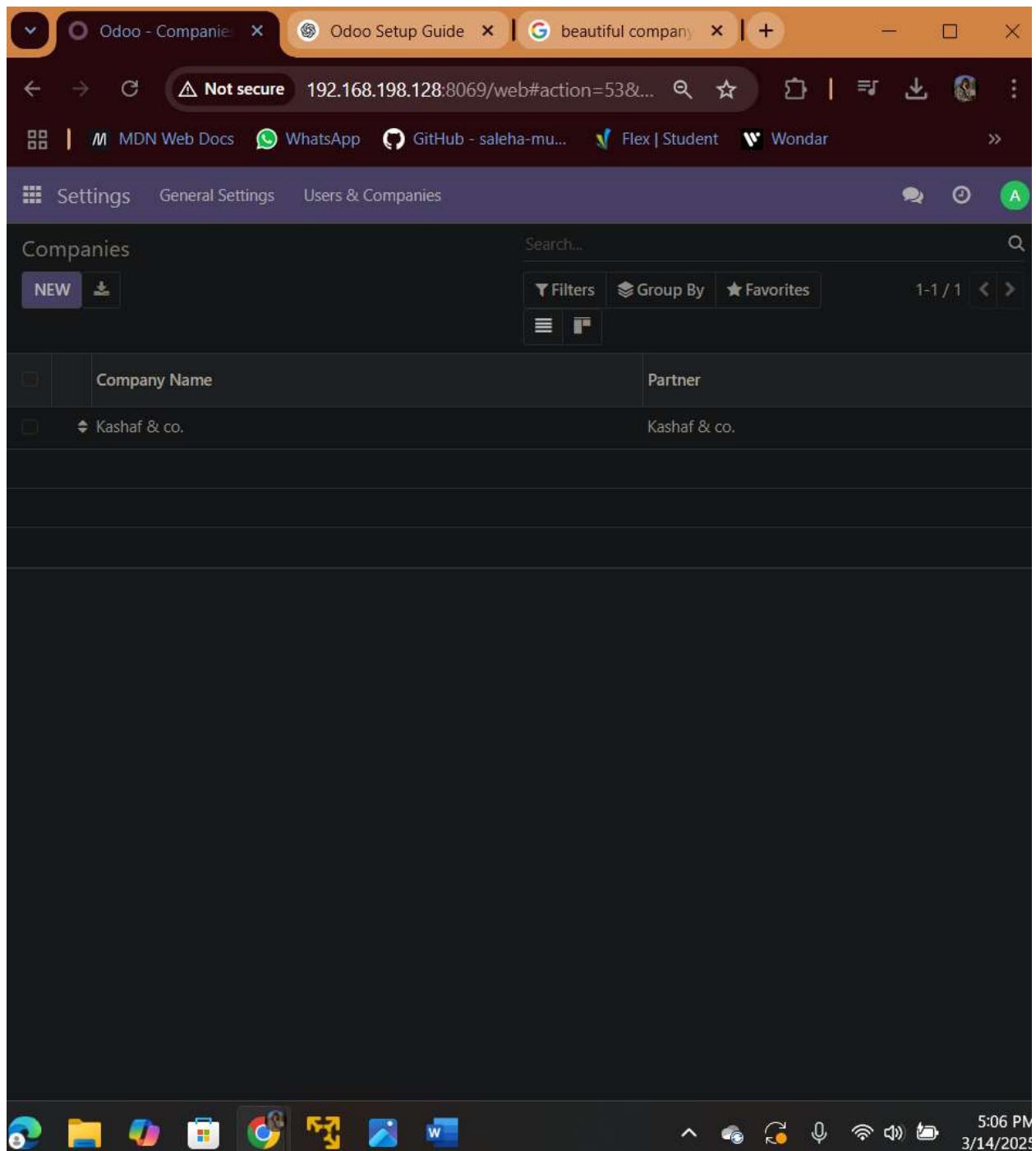
Address	H11/4	
Street 2...		
Islamabad	State	04403
Pakistan		
Tax ID?		
Company ID?		
Currency	PKR	
Phone	03466208273	
Mobile		
Email	i222415@nu.edu.pk	
Website	e.g. https://www.odoo.com	

At the bottom, there are buttons for 'Send message', 'Log note', and social sharing (Facebook, Twitter, LinkedIn). The system tray at the bottom right shows the date and time as 3/14/2025, 5:06 PM.

b) Updated the following details

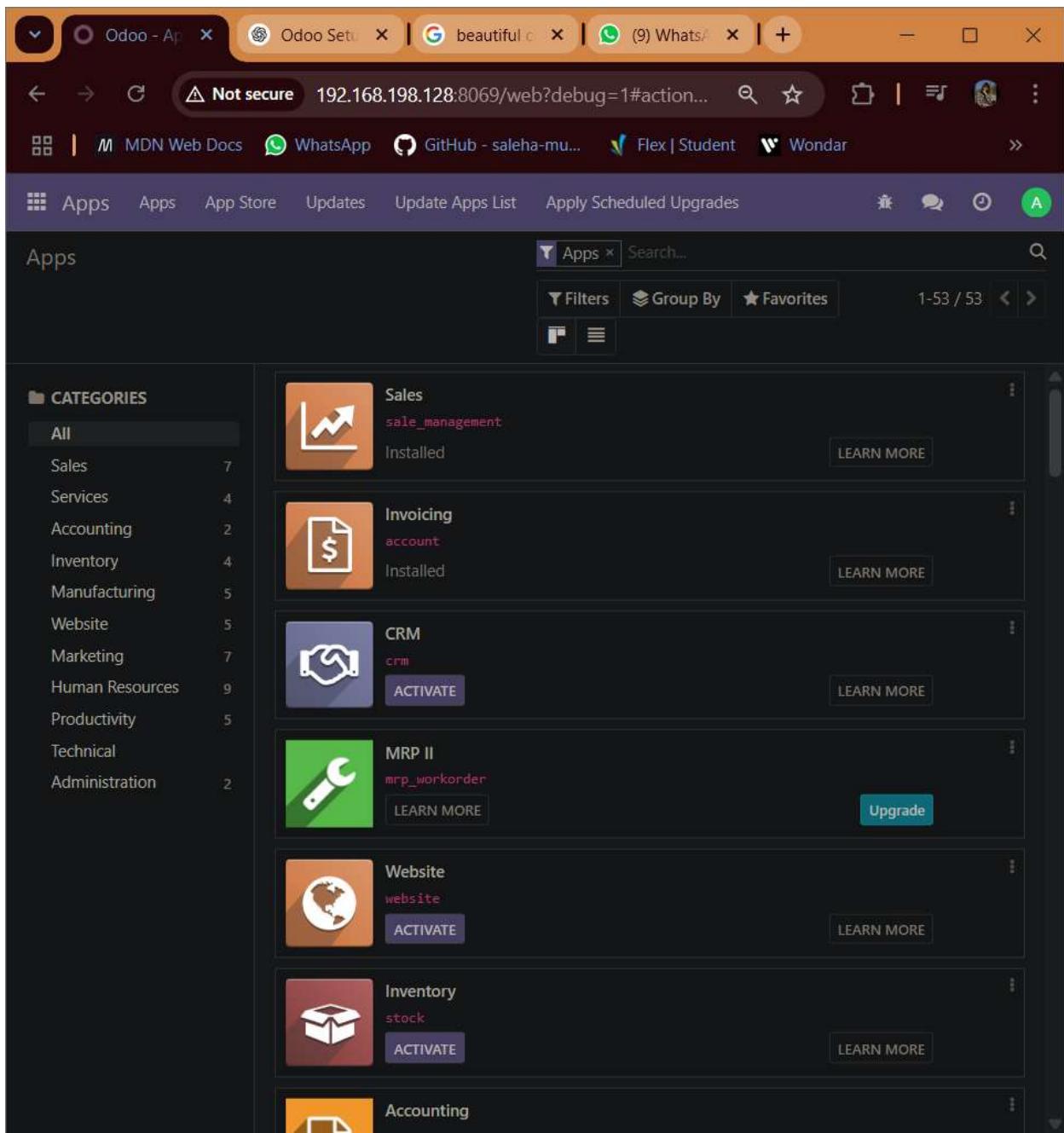


c) Clicked Save to apply changes.



2.5. *Installing Additional Modules*

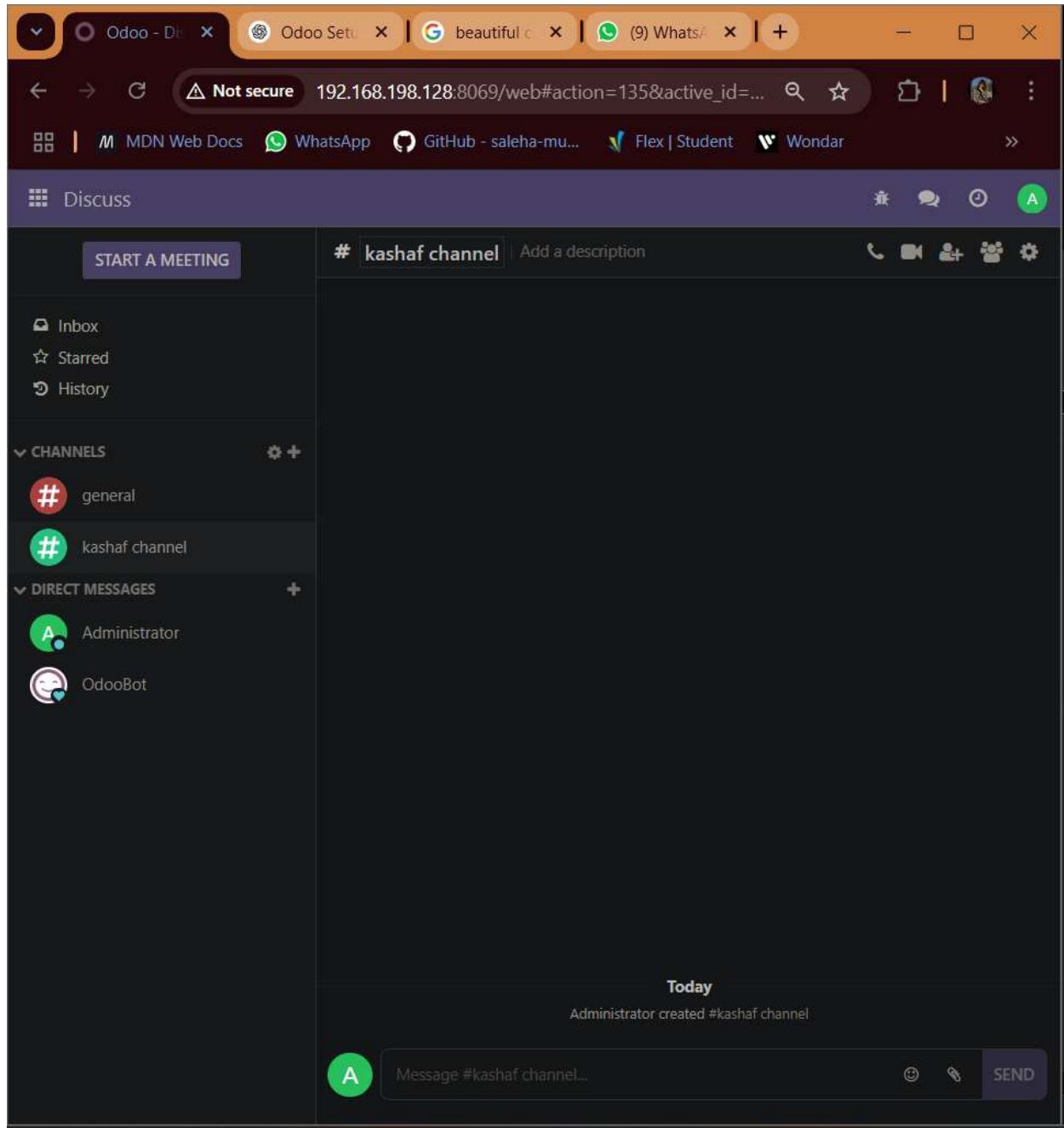
- a) From the **Apps** section, searched for and installed:
 - i. Sales Module
 - ii. Inventory Module



b) Verified that the modules appeared on the dashboard.

2.5. Creating a Communication Channel

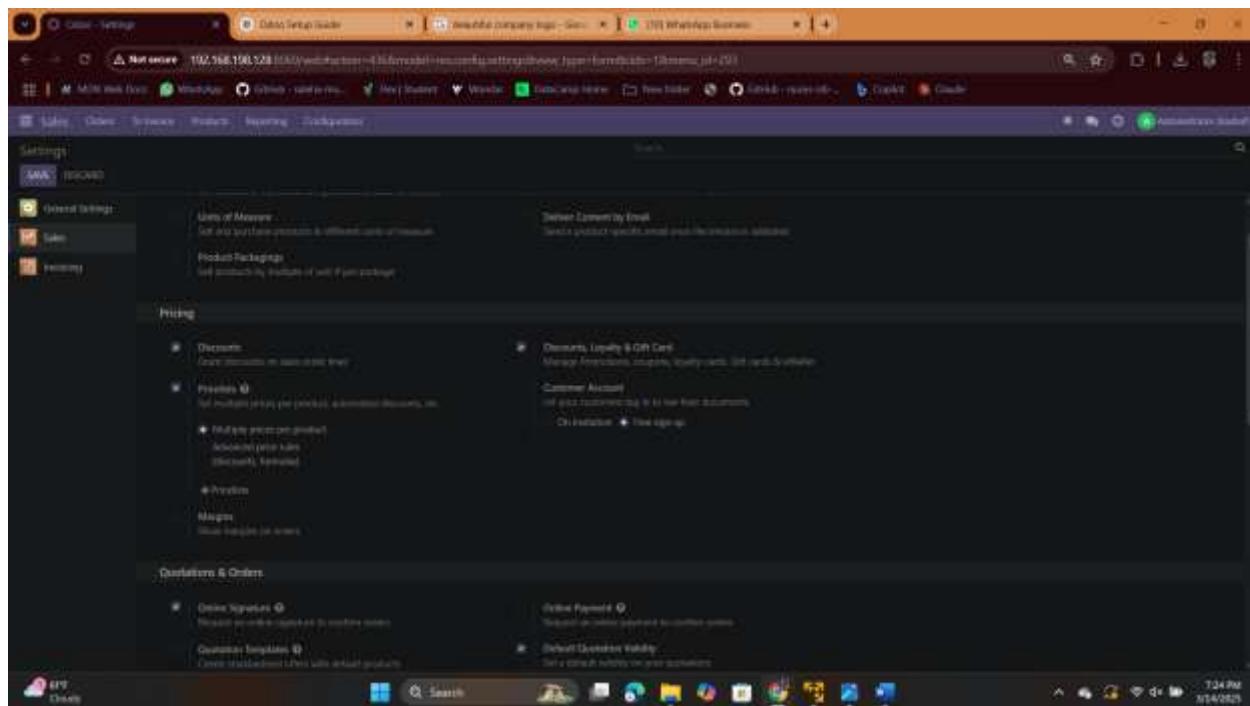
- A new channel named "**Kashaf Channel**" was created for internal discussions.



3. Advanced Configuration & Customization

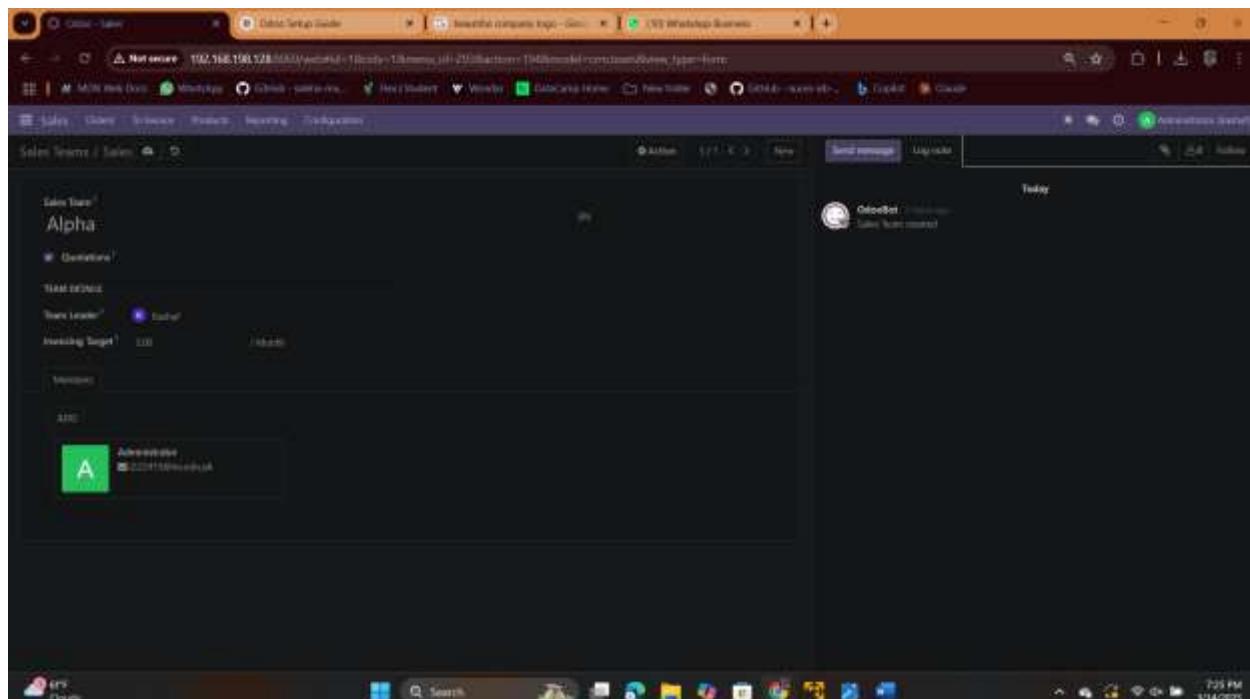
3.1. Exploring Sales and Inventory Modules Configuration options

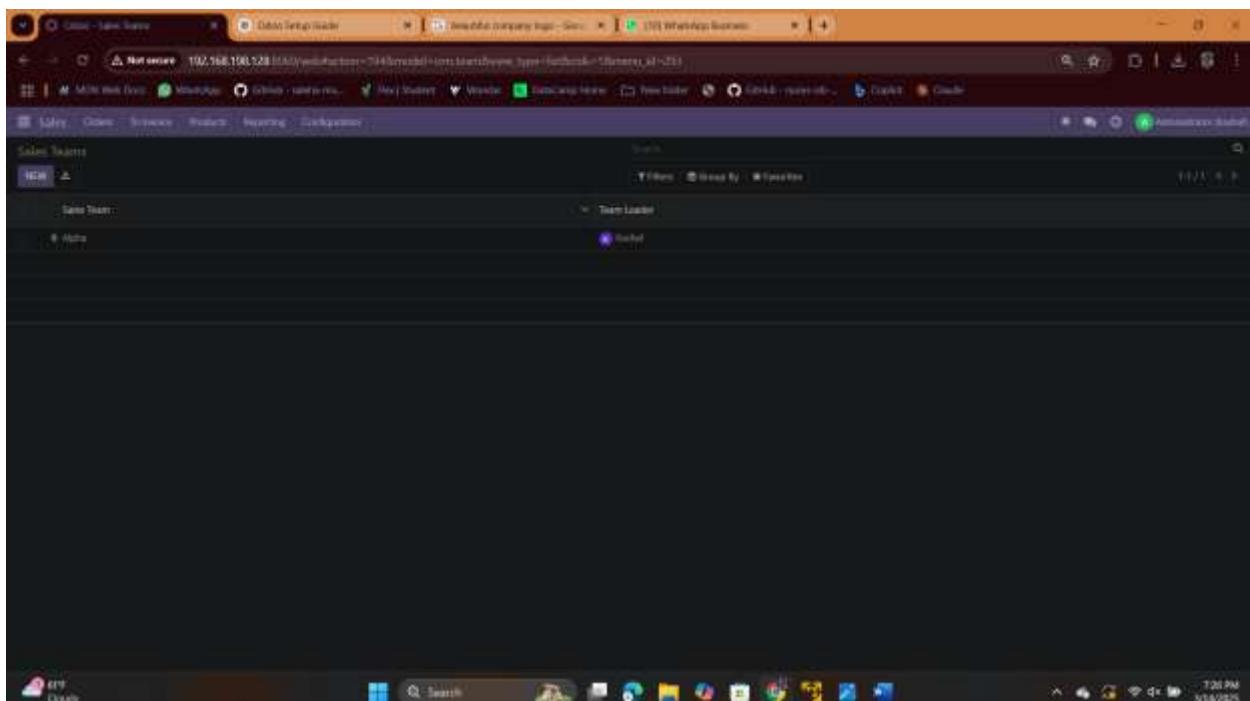
- The **Sales and Inventory Modules** were chosen for customization.



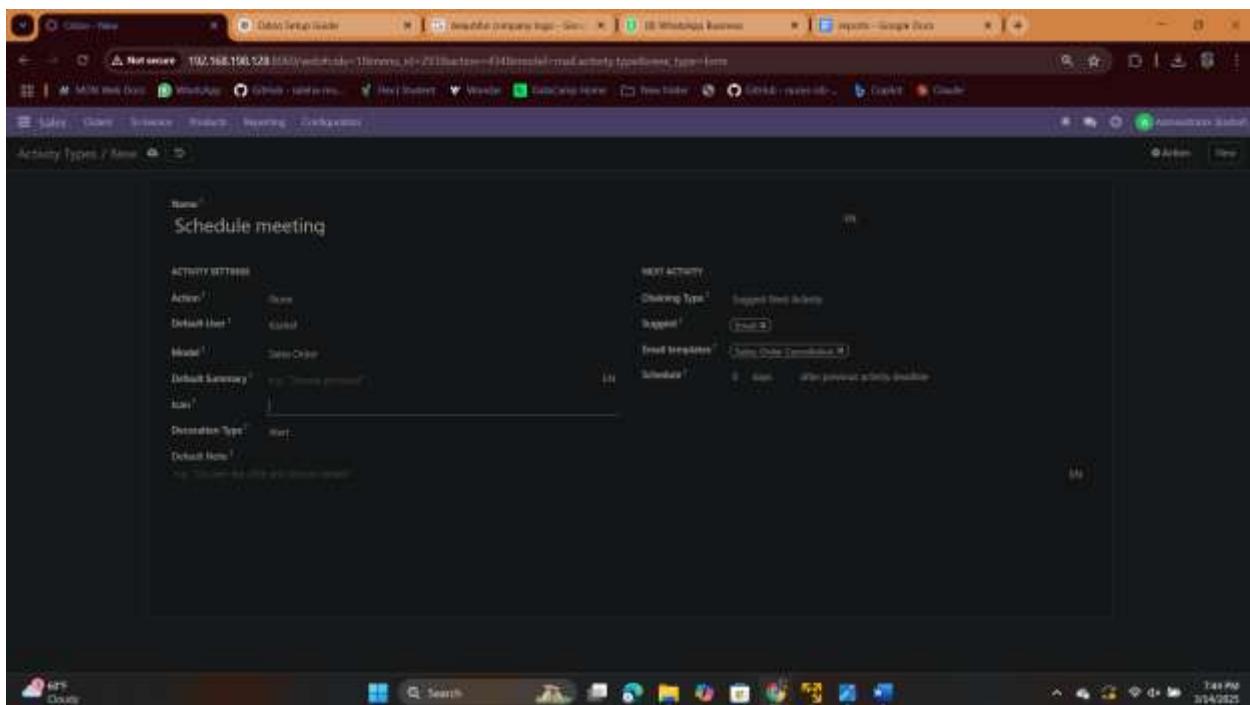
b) Key configurations in the Sales Module:

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





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



Name	Default Summary	Frequency	Type	Model	Icon
Call	2 days after previous activity deadline	2 days after previous activity deadline	To phone	Sales Order	Phone
Call	2 days after previous activity deadline	2 days after previous activity deadline	To phone	Sales Order	Phone
Meeting	2 days after previous activity deadline	2 days after previous activity deadline	To meet	Sales Order	Meet
Online meeting	0 days after previous activity deadline	0 days after previous activity deadline	To meet	Sales Order	Meet
To Do	5 days after previous activity deadline	5 days after previous activity deadline	To do	Sales Order	To do
Upload Document	5 days after previous activity deadline	5 days after previous activity deadline	To upload	Sales Order	Upload

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 - New beautiful company reports - Google

Not secure 192.168.198.128:8069/web#cid=1&menu_id...

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Settings General Settings Users & Companies Translations Technical

Fields / New New

Field Name ? x.abc EN

Field Label ? abc EN

Model ? Account

Field Type ? binary EN

Field Help ? EN

Properties Access Rights Miscellaneous

BASE PROPERTIES

Required ?

Readonly ?

Stored ? EN

Indexed ?

Copied ? EN

ADVANCED PROPERTIES

Related Field ?

Dependencies ?

Compute ? 1 | How to define a computed field

This screenshot shows the Odoo web interface for creating a new field. The field is defined as a 'binary' type with the name 'x.abc' and label 'abc'. It is associated with the 'Account' model. The 'Required' and 'Copied' checkboxes are checked. The 'Stored' checkbox is also checked and has 'EN' next to it. The 'Compute' section shows a value of 1. There are tabs for Properties, Access Rights, and Miscellaneous.

The screenshot shows a web browser window with three tabs open: 'Odoo - Fields', 'beautiful company', and 'reports - Google'. The 'Odoo - Fields' tab is active and displays the 'Fields' list. The URL in the address bar is '192.168.198.128:8069/web#action=19&mod...'. The page has a dark theme. At the top, there are navigation icons and a search bar with the placeholder 'Field abc x Search...'. Below the search bar are buttons for 'Filters', 'Group By', and 'Favorites'. A progress bar indicates '1-1 / 1'. The main table has columns: Field Name, Field Label, Model, Field Type, Type, Indexed, Stored, Readonly, and Related Model. One row is visible, showing 'x_abc' as the Field Name, 'abc' as the Field Label, 'Account' as the Model, 'binary' as the Field Type, 'Custom Field' as the Type, and checked boxes for Indexed, Stored, and Readonly. The bottom of the screen shows a taskbar with various icons and the system tray with the date and time '7:51 PM 3/14/2025'.

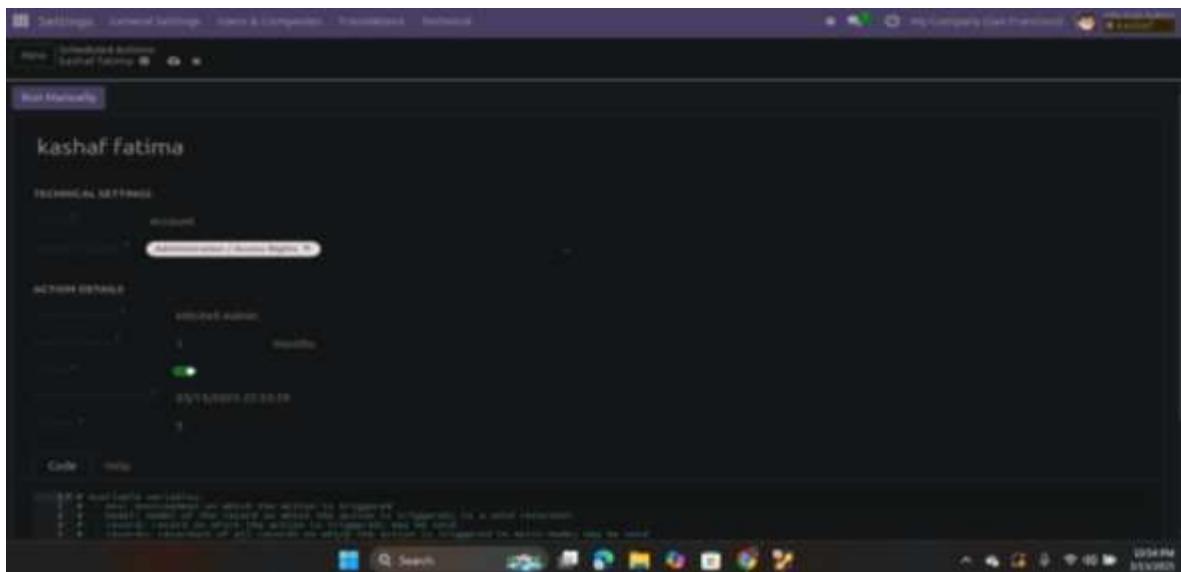
	Field Name	Field Label	Model	Field Type	Type	Indexed	Stored	Readonly	Related Model
<input type="checkbox"/>	x_abc	abc	Account	binary	Custom Field	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

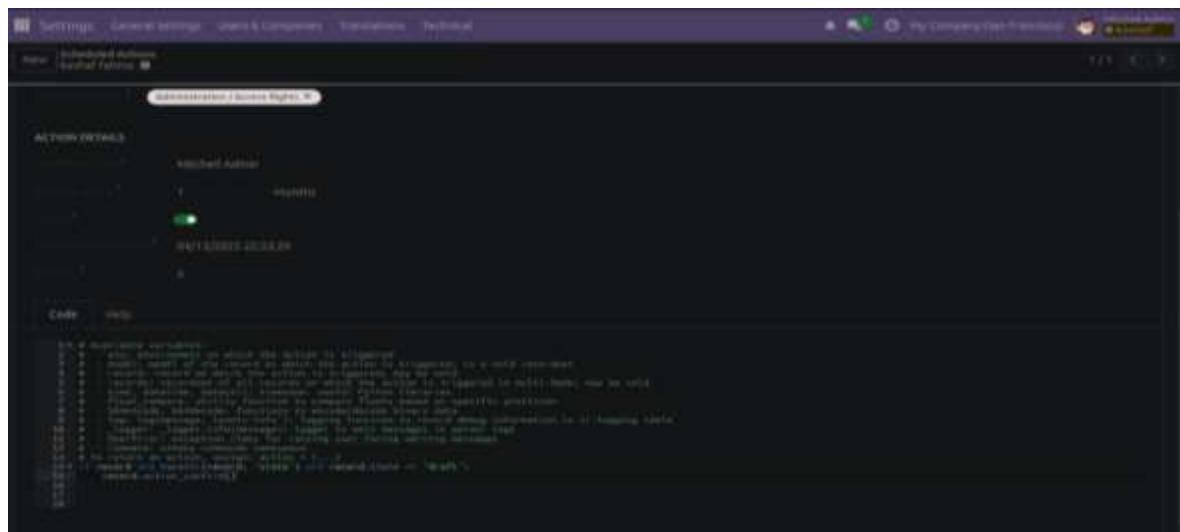
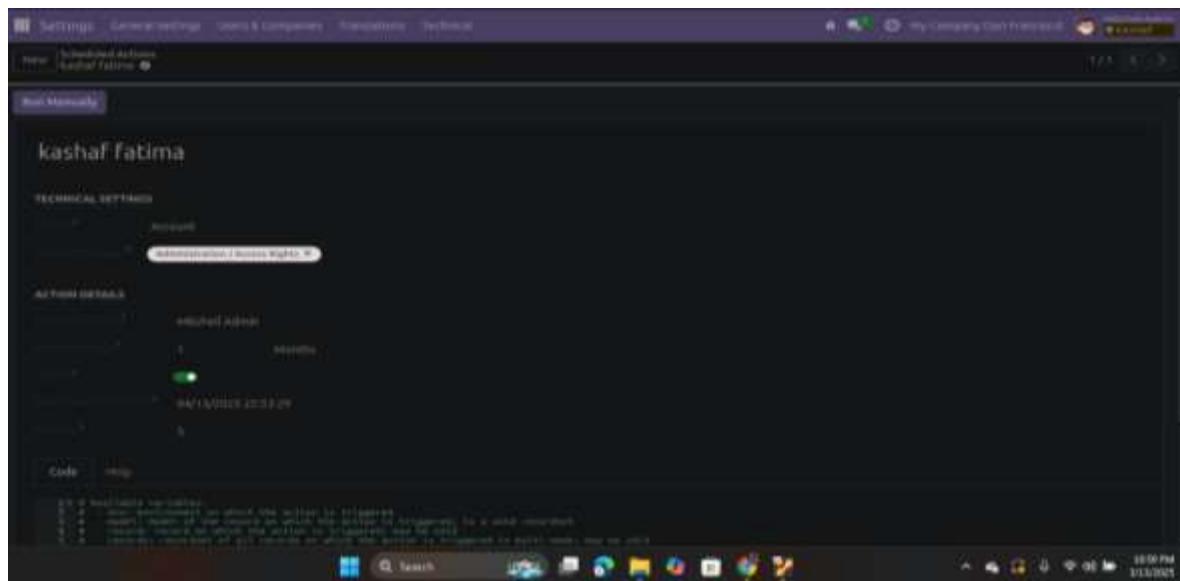
- b) Clicked Create, selected the appropriate module, and added a custom field.

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

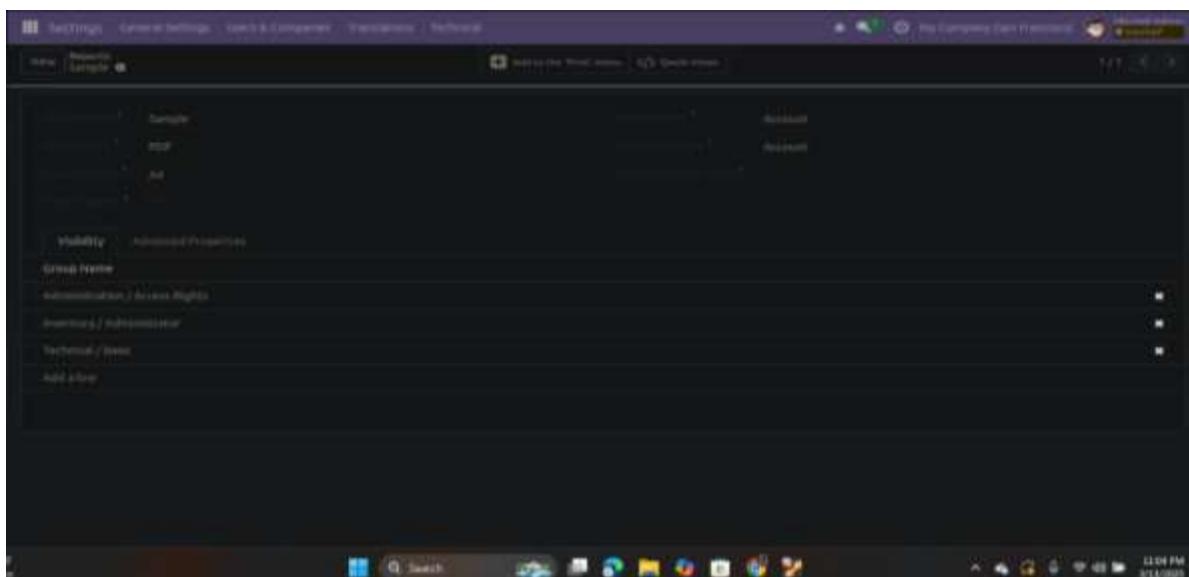


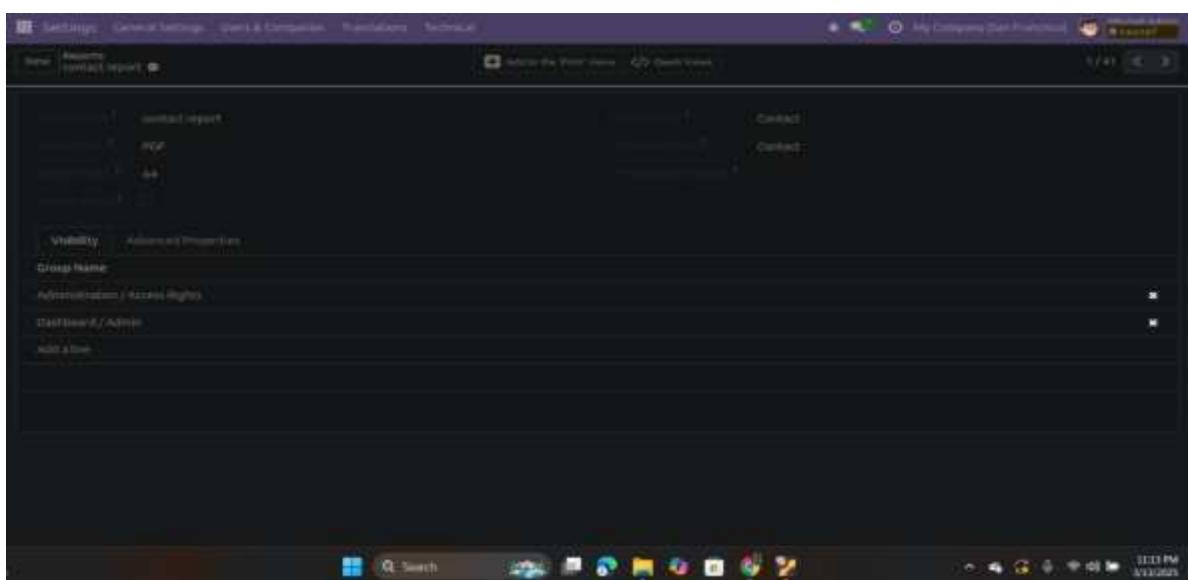
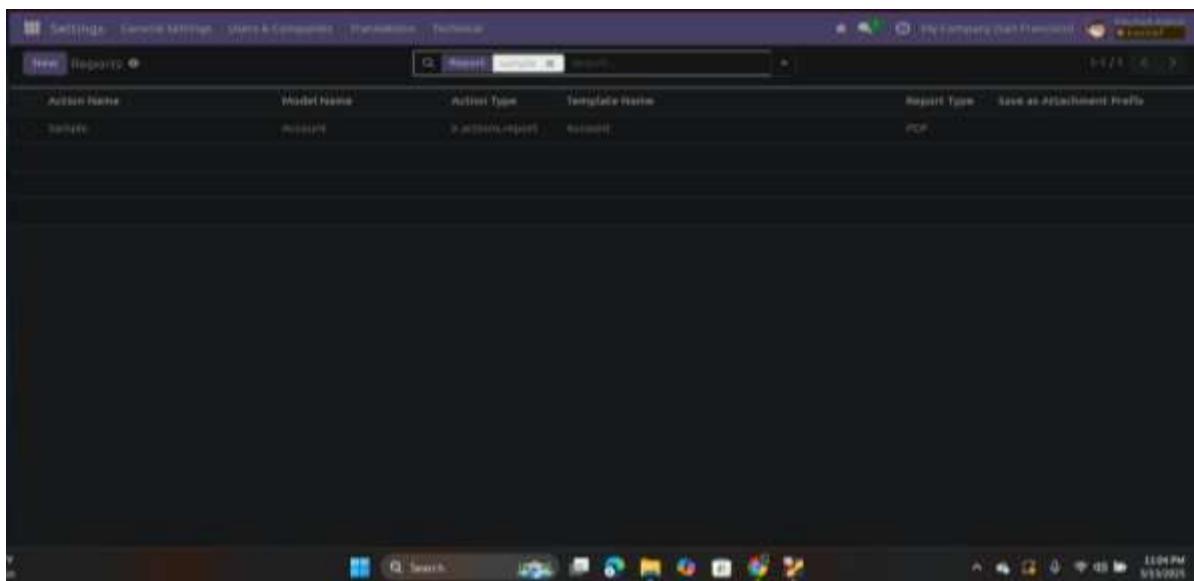


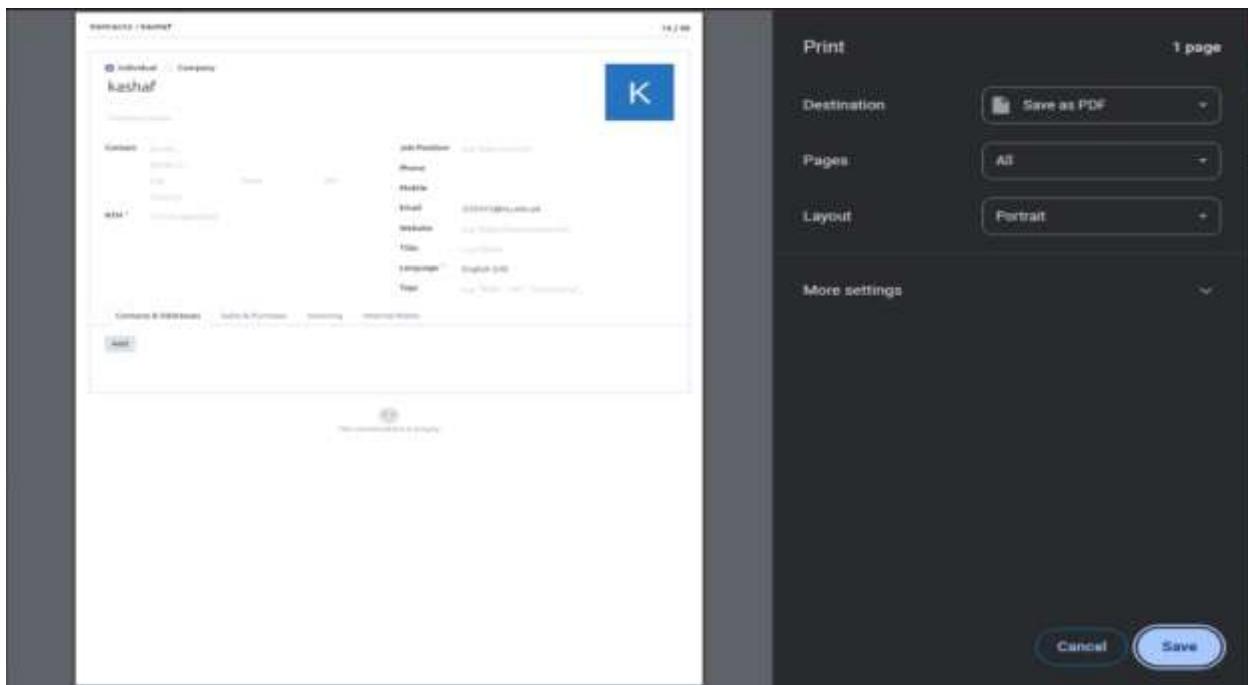
Priority	Action Name	Model	Next Execution Date	Interval	Interval Unit	Active
2	Account: Price draft updated with sales price enabled and accounting date up to today.	Journal Entry	03/14/2023 07:00:07	1	Days	on
3	Reset Auto-reload internal data	Automatic Values	03/14/2023 00:00:00	1	Days	on
2	User: Portal User Deletion	Users Deletion Request	03/14/2023 00:00:07	1	Days	on
3	Signal: Errors	Signal	03/14/2023 00:00:09	1	Days	on
3	Chanel: Chanel member unrole	Chanel Member	03/14/2023 22:00:02	1	Days	on
3	Display: Asset settings Unrole	Asset Setting	03/14/2023 22:00:02	1	Days	on
3	Vertical: Politics	Account	03/13/2023 22:00:09	1	Months	on
3	Mail: Email Queue Manager	Outgoing Mail	03/13/2023 03:00:00	1	Hours	on
3	Mail: Post scheduled messages	Scheduled Message	03/14/2023 22:00:02	1	Days	on
3	AMBI: send web push notification	Push Notifications	03/14/2023 22:00:02	1	Days	on
3	Notifications: Delete notifications older than 6 months	Message Notifications	03/14/2023 22:00:02	1	Days	on
3	Notifications: Notify scheduled messages	Scheduled Messages	03/14/2023 22:00:02	1	Hours	on
3	Partner: Autocomplete Sync with Immobilis	Partner Autocomplete Sync	03/14/2023 22:00:02	1	Hours	on
3	Procurement: run scheduled	Procurement Group	03/14/2023 22:00:09	1	Days	on
3	Serial: Devices automatically	Journal Entry	03/14/2023 02:00:07	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

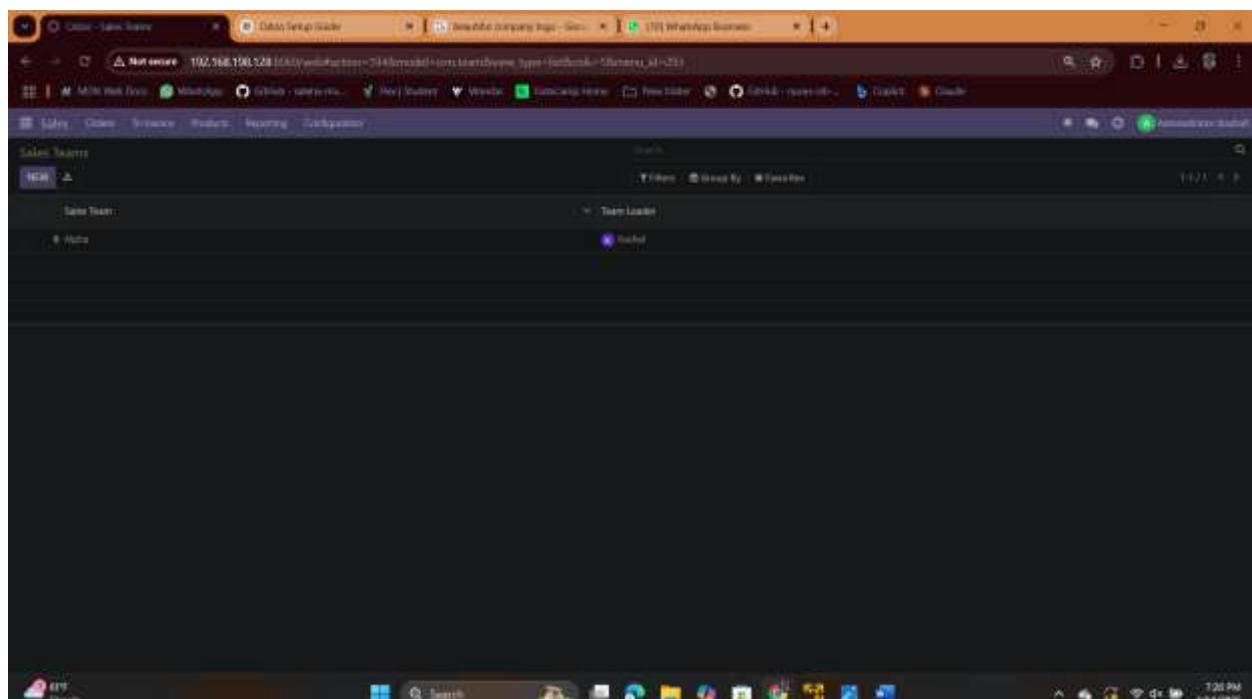
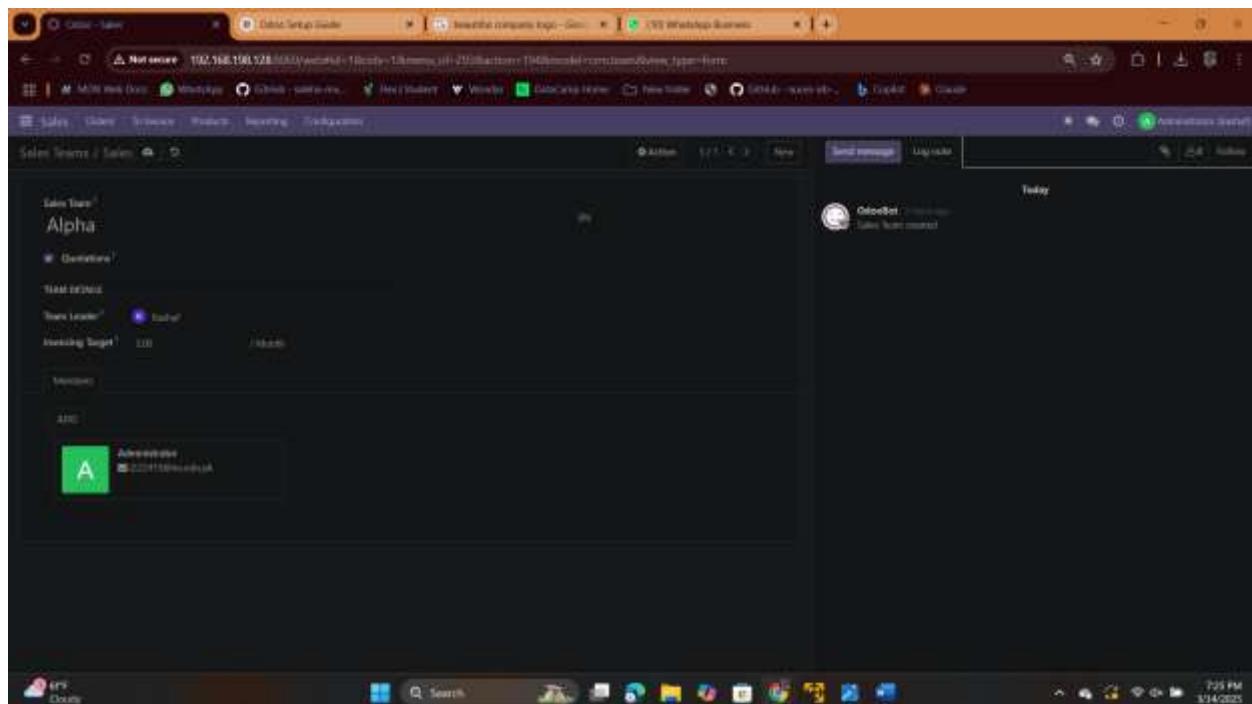
Test Steps:

1. Navigate to **Sales** → **Configuration** → **Sales Teams**.
2. Click **Create** and enter the following details:
 - o Sales Team Name: **Alpha**
 - o 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 shows a web browser window with multiple tabs open. The active tab is titled 'Odoo - IN' and displays the Odoo Sales Quotations module. The URL is 192.168.198.128:8069/web#id=1&cids=1&menu_id=1. The page shows a quotation for customer 'Kashaf' with reference 'INV/2025/00001'. The status is 'POSTED' and it is marked as 'PAID'. The total amount due is 0.00 Rs. The weather widget at the bottom left shows '61°F Cloudy'.

Quotations / S00001 / INV/2025/00001

Customer Invoice
INV/2025/00001

Customer? Kashaf

Invoice Date? 03/14/2025

Payment Reference? INV/2025/00001

Due Date? 03/14/2025

Currency? PKR

Invoice Lines Other Info

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

61°F
Cloudy

Search

Odoo - Invoices

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

MDN Web Docs WhatsApp GitHub - saleha-mu... Flex | Student Wondar

Invoicing Customers Vendors Reporting Configuration

Invoices Search... NEW UPLOAD

Filters Group By Favorites 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.

Create In Create your fi First inv...

Number	Custom...	Invoice ...	Due Da...	Activiti...	Tax Excl...	Total	Total in ...	Paymen...	Stat...
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

The screenshot shows the Odoo Invoices module. At the top, there's a navigation bar with tabs for Invoicing, Customers, Vendors, Reporting, and Configuration. Below that is a search bar and a toolbar with buttons for NEW, UPLOAD, and download. The main area has four sections: Company Data (with a 'Let's start!' button), Bank Account (marked as 'Step Completed!'), Invoice Layout, and Create In. Below these sections is a table displaying an invoice record with columns for Number, Custom..., Invoice ..., Due Da..., Activiti..., Tax Excl..., Total, Total in ..., Paymen..., and Stat... (partially cut off). The invoice details are: Number: INV/2025/0..., Customer: Kashaf, Due Date: Today, Activity: (empty), Tax Excl: 20.00 Rs., Total: 23.40 Rs., Total in: 23.40 Rs., Payment Status: Not Paid, Status: Draft. At the bottom right, there's a system tray with icons for file operations and system status, and a timestamp: 4:45 PM 3/14/2025.