



Customization documentation

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Customization Documentation

1. Introduction

This document details the customization and integration efforts made within the Sales and Contacts modules of Odoo. The customization includes modifying configurations, adding new sales teams, creating custom activities, generating invoices, and enhancing the overall workflow for sales and customer management.

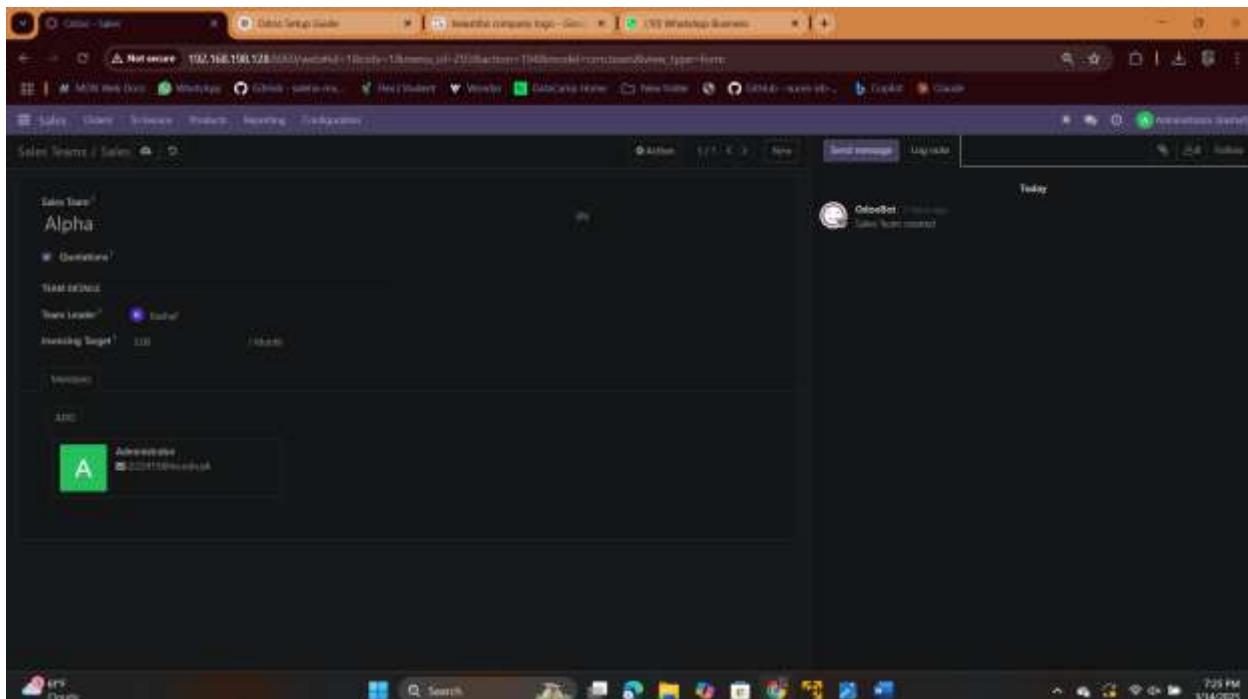
2. Customization in the Sales Module

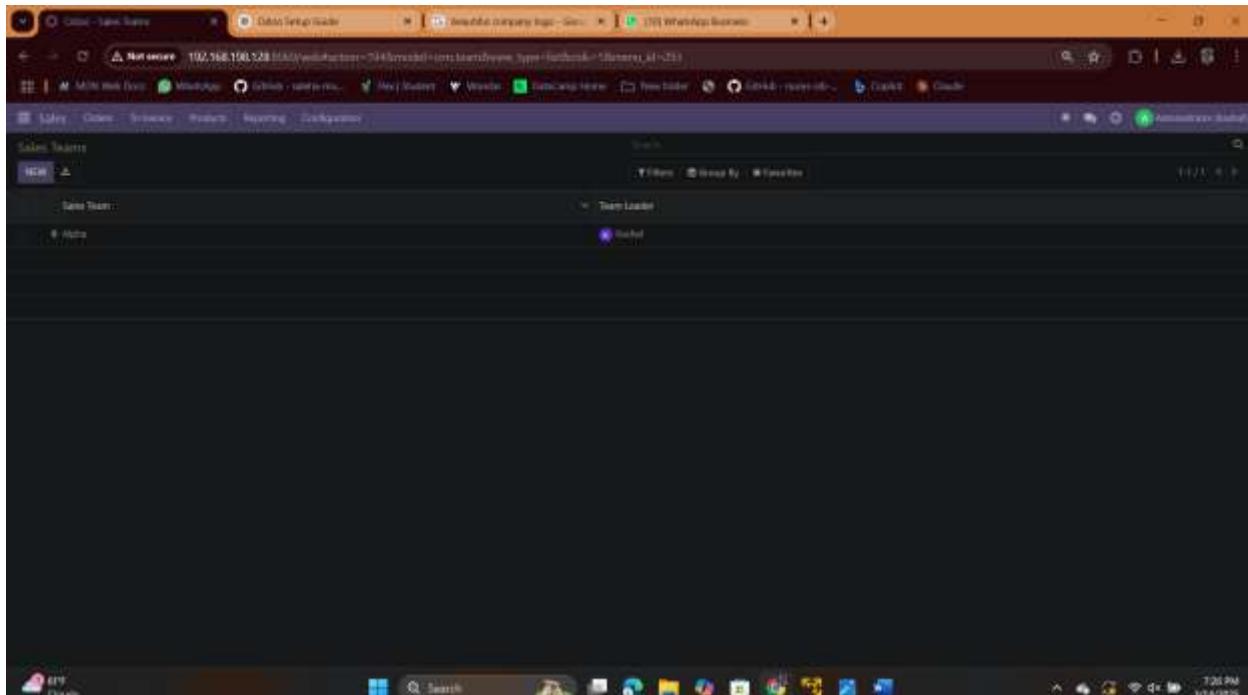
2.1 Creating and Configuring a Sales Team

Objective: To organize the sales process efficiently by creating a dedicated sales team.

Steps:

1. Navigated to **Sales Module → Configuration → Sales Teams**.
2. Clicked **Create** and entered:
 - o **Sales Team Name:** Alpha
 - o **Assigned Members:** Added relevant sales representatives
 - o **Invoicing Policy:** Configured based on business requirements
3. Clicked **Save** to finalize the sales team creation.



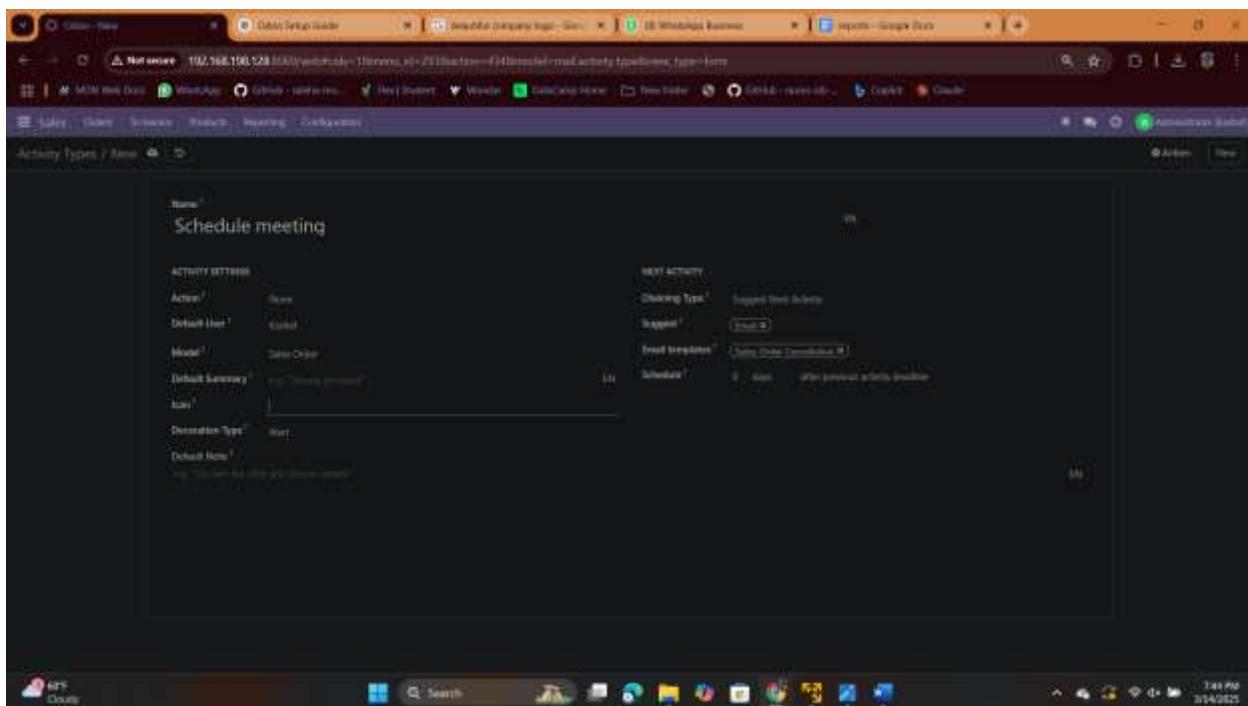


2.2 Creating a New Activity Type in Sales Configuration

Objective: To streamline the sales process by defining new activity types for better tracking.

Steps:

1. Navigated to **Sales Module** → **Configuration** → **Activity Types**.
2. Clicked **Create** and entered
3. Clicked **Save** to apply the changes.



The screenshot shows a list of activity types in Oracle Database SQL Developer. The table includes columns for Name, Default Summary, Reminders, Type, Model, and Score.

Name	Default Summary	Reminders	Type	Model	Score
E-mail		0 days, after previous activity deadline		None	100
E-call		2 days, after previous activity deadline		None	100
E-meeting		0 days, after previous activity deadline		None	100
E-Clean Up Work		0 days, after previous activity deadline		Sales Order	100
E-Schedule meeting		0 days, after previous activity deadline		Sales Order	100
E-Tell		5 days, after previous activity deadline		None	100
E-Upload Document		3 days, after previous activity deadline		None	100

2.3 Creating and Managing Customer Invoices

Objective: To generate invoices for customer purchases efficiently.

Steps:

1. Navigated to **Sales Module** → **Orders** → **Quotations**.
2. Clicked **Create** and filled in:
 - **Customer Name:** Kashaf
 - **Product:** Books (20 units)
 - **Price & Tax Details:** Configured based on the product settings
3. Clicked **Save** and **Confirm** to convert the quotation into a Sales Order.
4. Navigated to **Invoicing** → **Create Invoice** and validated the invoice.

2.4 Enabling Sales Reports for Better Insights

Objective: To analyze sales data for better decision-making.

Steps:

1. Navigated to **Sales Module** → **Reporting** → **Sales Analysis**.
2. Used filters to analyze sales based on:
 - **Customers**
 - **Products Sold**
3. Exported reports for review.

Outcome: Sales performance could be tracked more effectively using the reporting features.

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 of 4:45 PM on 3/14/2025.

The screenshot shows the Odoo Quotations module interface. At the top, there are three tabs: "Odoo - Quotation" (highlighted), "Odoo Setup Guide", and "beautiful company". The address bar indicates the URL is 192.168.198.128:8069/web#action=312... and the page title is "Not secure". Below the header, there are links for "MDN Web Docs", "WhatsApp", "GitHub - saleha-mu...", "Flex | Student", and "Wonder". The main menu includes "Sales", "Orders", "To Invoice", "Products", "Reporting", and "Configuration". A green badge with the letter "A" is visible in the top right corner.

The "Quotations" screen displays a list of three entries:

	Number	Creation Date	Customer	Salesperson	Activities	Total	Status
<input type="checkbox"/>	S00003	03/14/2025	fatima	Administrator		117.00 Rs.	Sales Order
<input type="checkbox"/>	S00002	03/14/2025	fatima	Administrator		0.00 Rs.	Quotation
<input type="checkbox"/>	S00001	03/14/2025	Kashaf	Administrator		23.40 Rs.	Sales Order

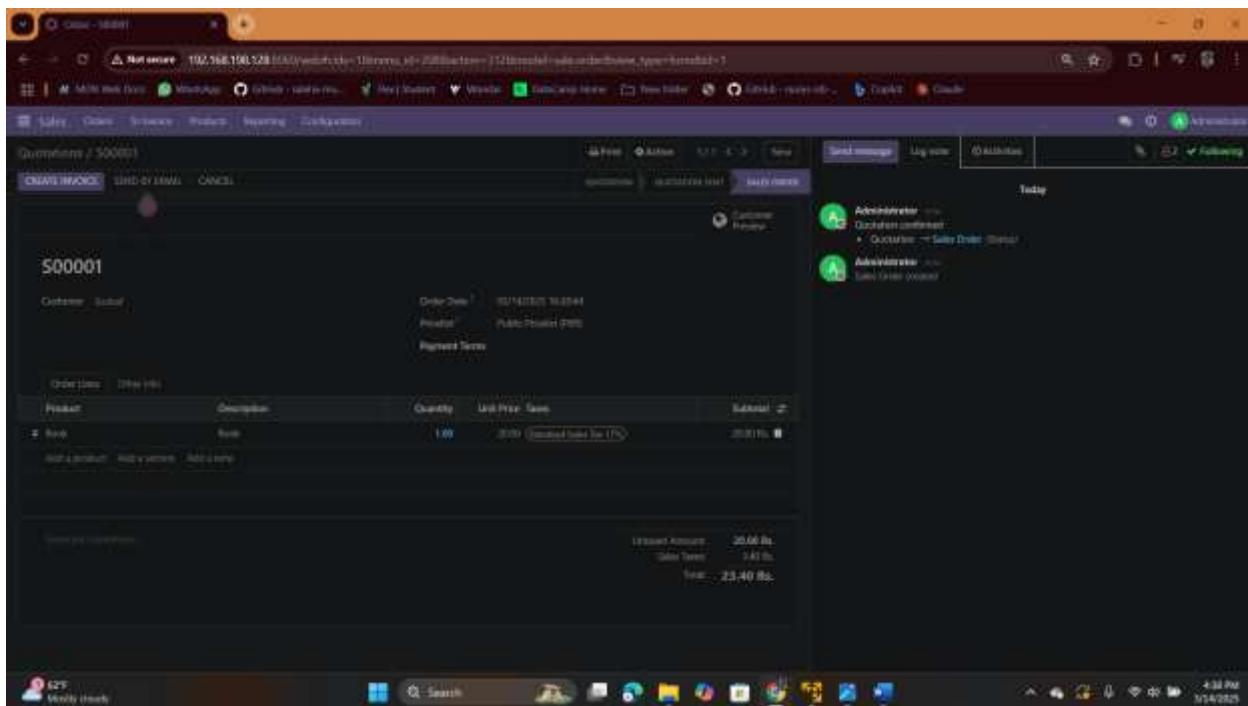
A summary at the bottom right indicates a total of 140.40 Rs.

Sales Analysis					
Order Date	Order #	Customer	Sales Team	Total Sales	Profit Margin
01/15/2023	10001	Administrator	Sales Team	\$100.00	10%
01/16/2023	10002	Administrator	Sales Team	\$200.00	10%
01/17/2023	10003	Administrator	Sales Team	\$300.00	10%

A screenshot of a web browser displaying a dark-themed accounting application. The top navigation bar shows the URL as 'Not secure 192.168.180.128 https://monsoon.ubiquitysoft.com/login-4474-0.html#/leads/27'. Below the URL is a toolbar with various icons for file operations like 'New', 'Open', 'Save', etc. The main content area is titled 'Draft Invoice INV/2025/00001'. It shows a summary section with a total amount of '23.40 Rs.' and a note 'Your logo' with a placeholder 'My Company Logo'. A table below details the invoice items:

Description	Quantity	Unit Price (Rate)	Amount
Item	1.00	30.00 INR + 6% GST	30.00 Rs.
		Grand Total	30.00 Rs.
		Gross Total	29.40 Rs.
		Total	23.40 Rs.

The bottom of the screen shows a taskbar with various application icons and system status indicators.



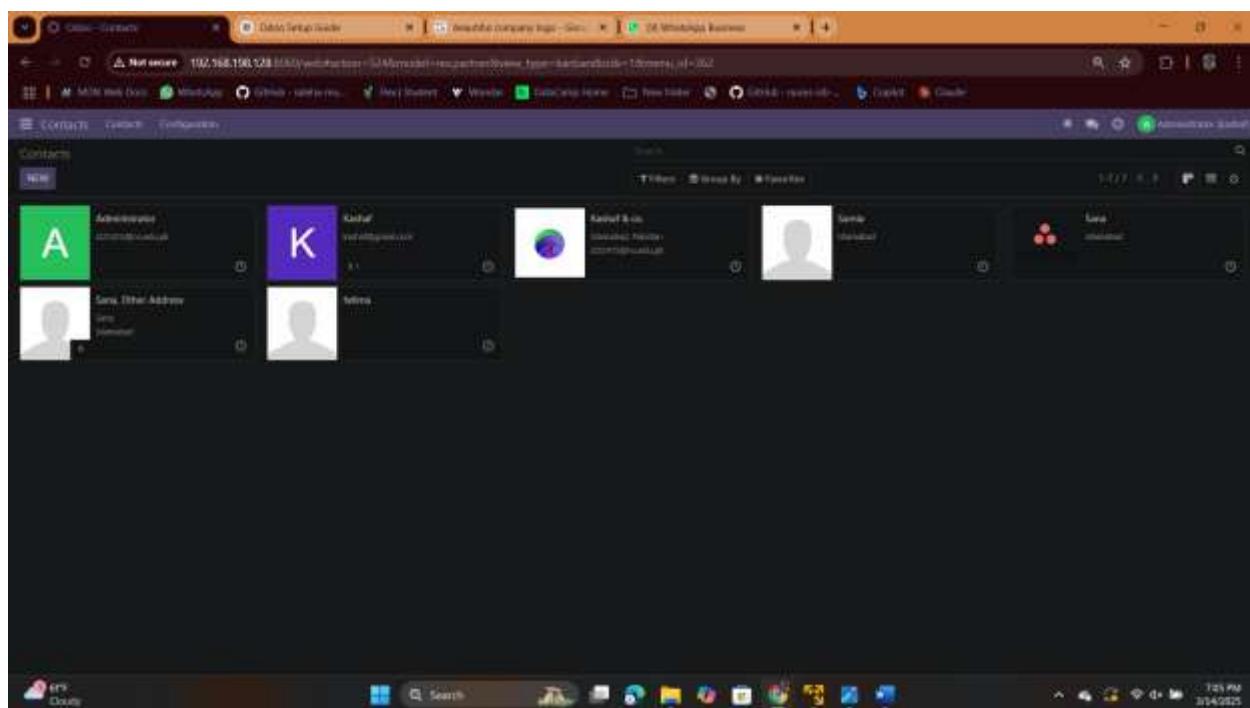
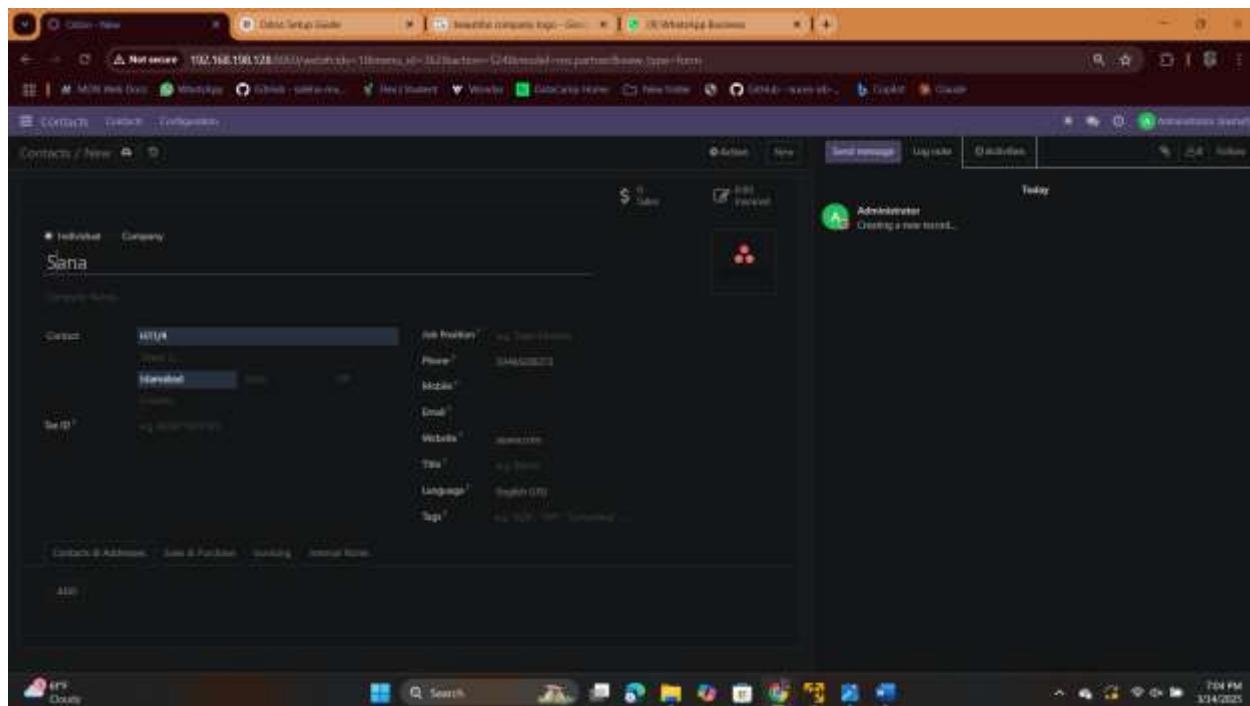
3. Customization in the Contacts Module

3.1 Adding New Customers & Team Members

Objective: To maintain an updated record of customers and sales team members.

Steps:

1. Navigated to **Contacts Module → Create**.
2. Added new customers and team members:
 - o **Customer Name:** Kashaf
 - o **Assigned Role & Channel:** Added Samia to the General Channel
3. Clicked **Save** to finalize the entries.



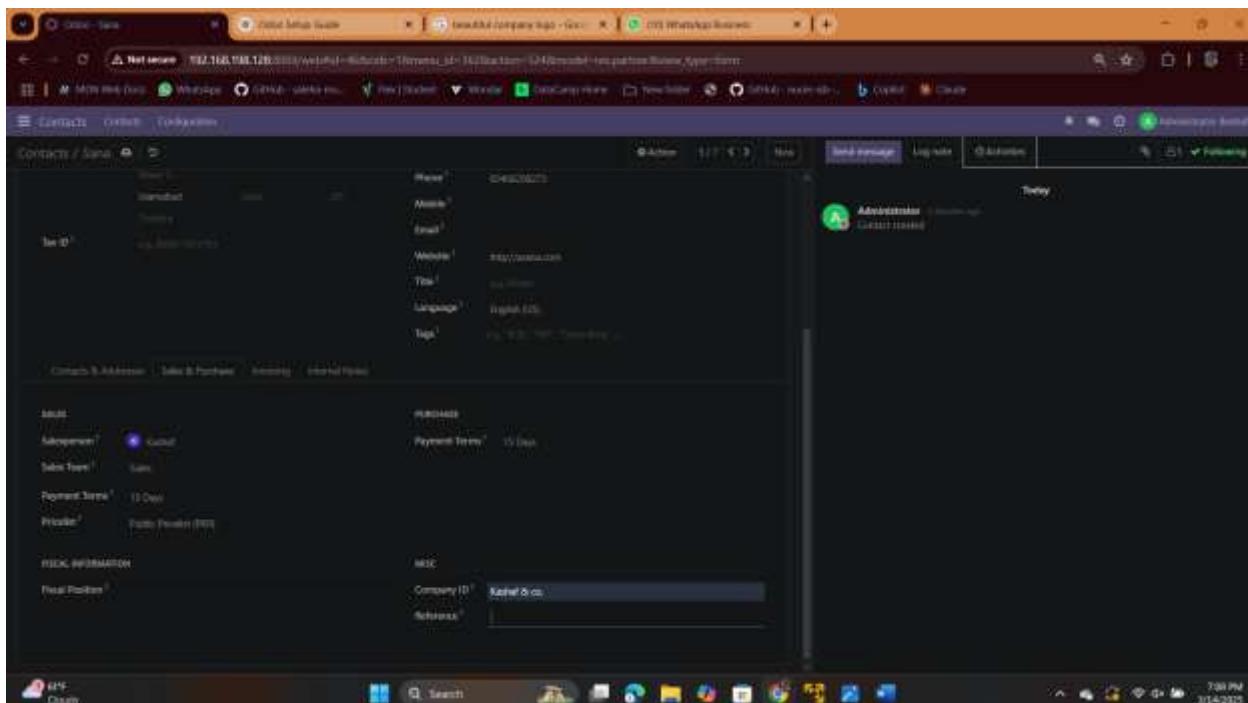
3.2 Categorizing Contacts for Better Management

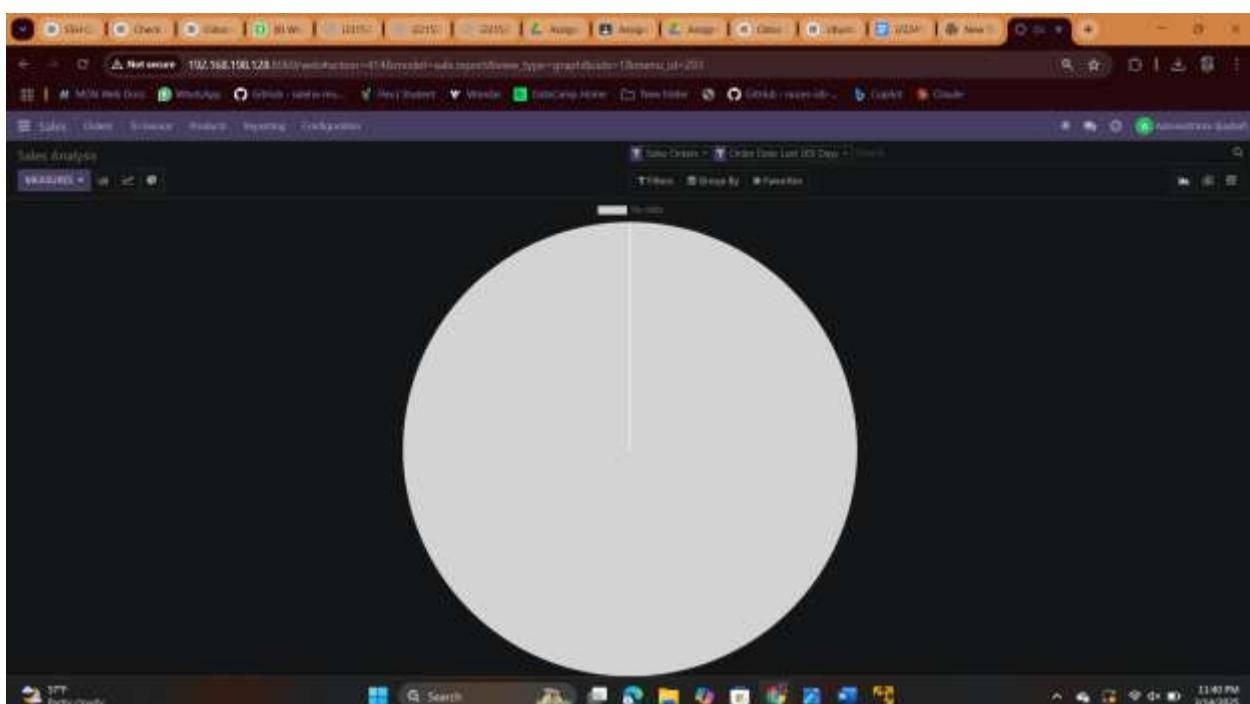
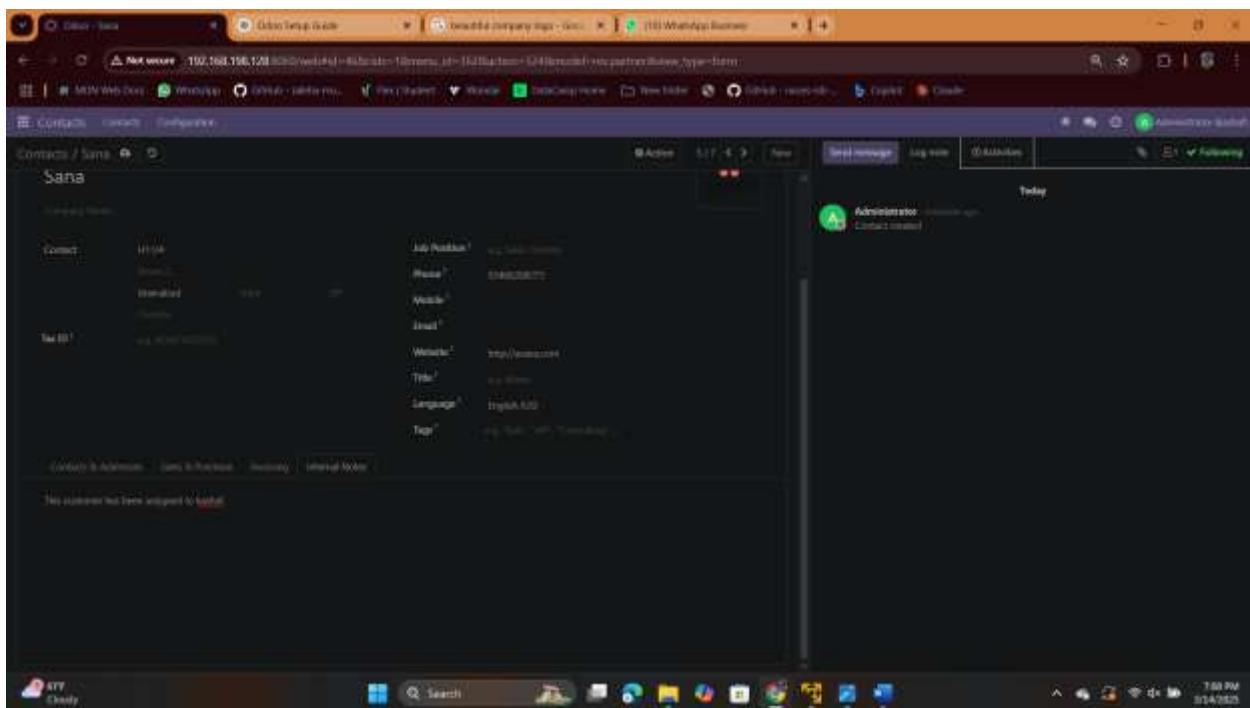
Objective: To segment contacts based on their role (Customer, Vendor, Supplier).

Steps:

1. Opened an existing contact record.
2. Edited the **Sales & Purchase** tab:
 - o Selected **Customer or Vendor**
 - o Assigned a **Salesperson**
 - o Defined **Payment Terms**
3. Clicked **Save** to apply the changes.

Outcome: Categorized contacts for easier segmentation and sales tracking.



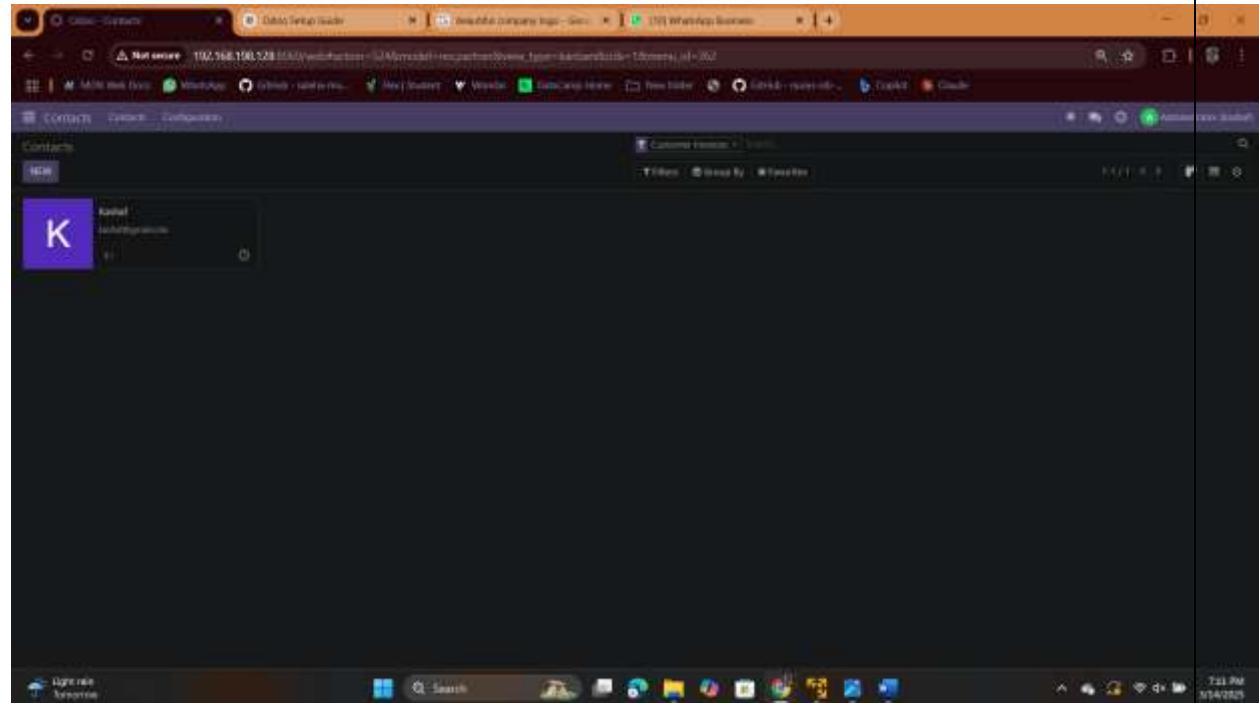


3.3 Customizing the Contact Search & Filtering

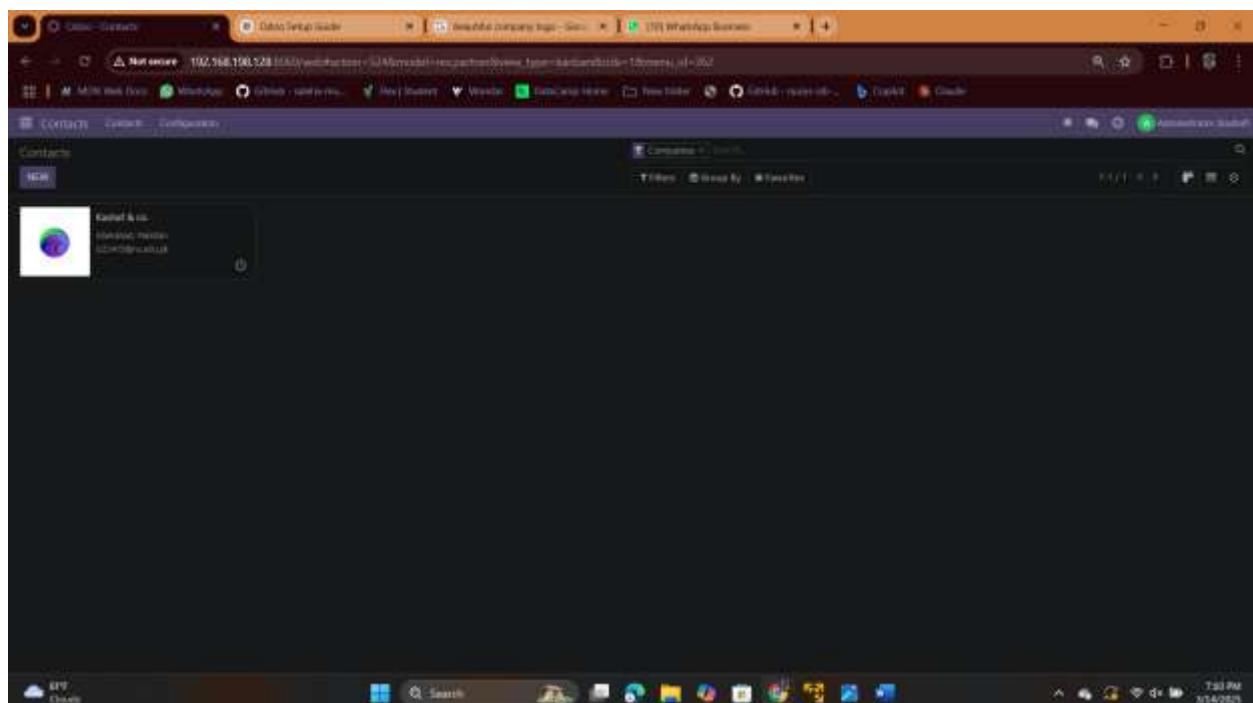
Objective: To efficiently search and filter contacts based on various criteria.

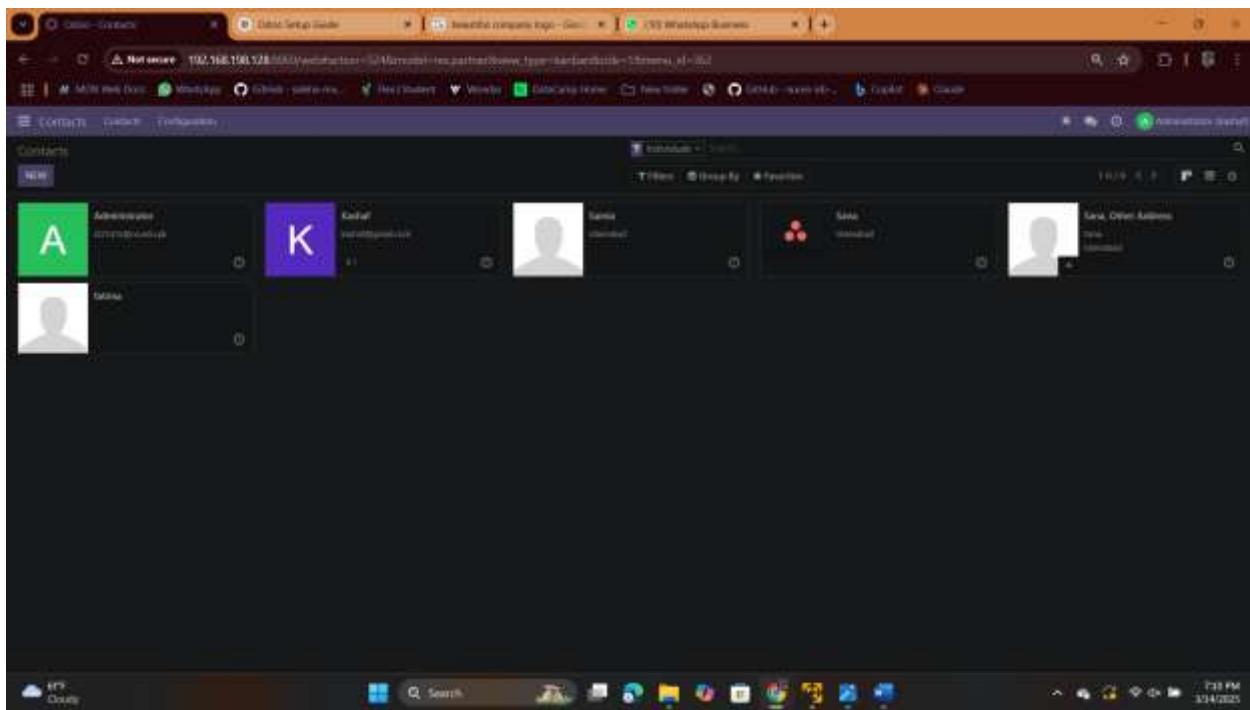
Steps:

1. Used the **Search Bar** to find specific contacts.
2. Applied filters:
 - o **Customers Only:** Displayed customer records



- o **Companies vs. Individuals:** Grouped contacts accordingly





3. Used **Group By** to categorize contacts based on **Country, Company, or Salesperson**.

