Customization documentation

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Assing: 01

Subject: SCD

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.

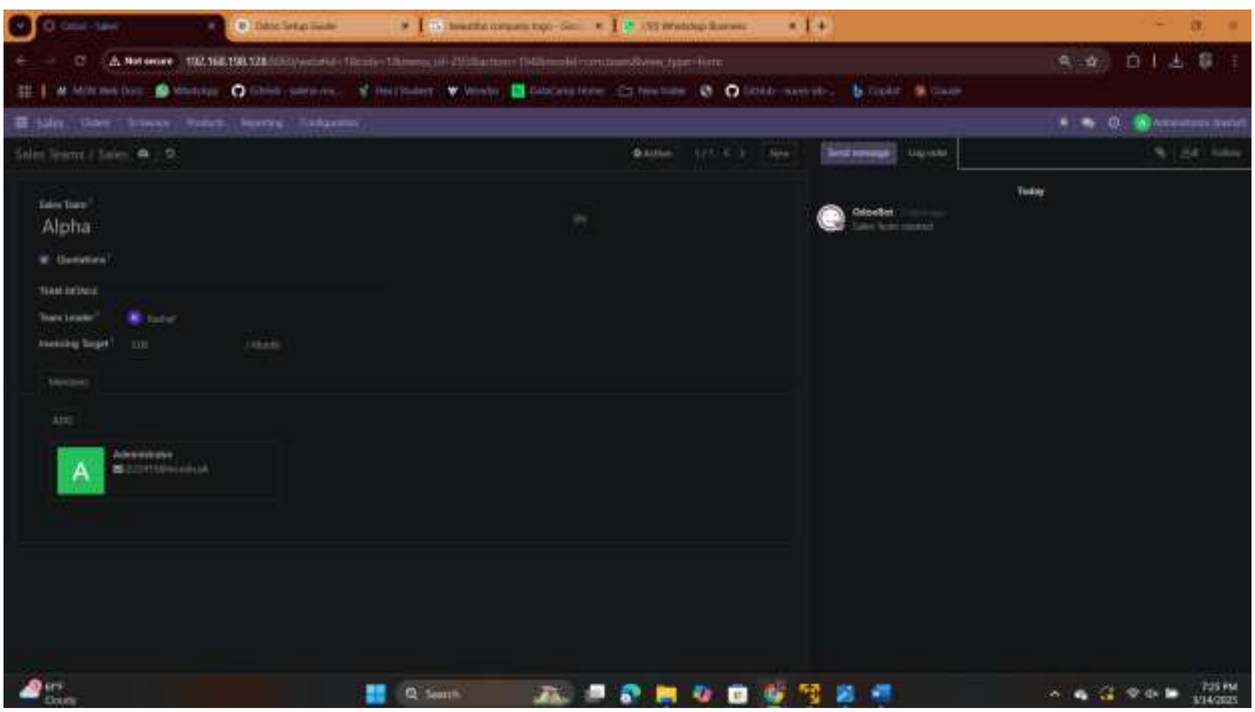
2. Customization in the Sales Module

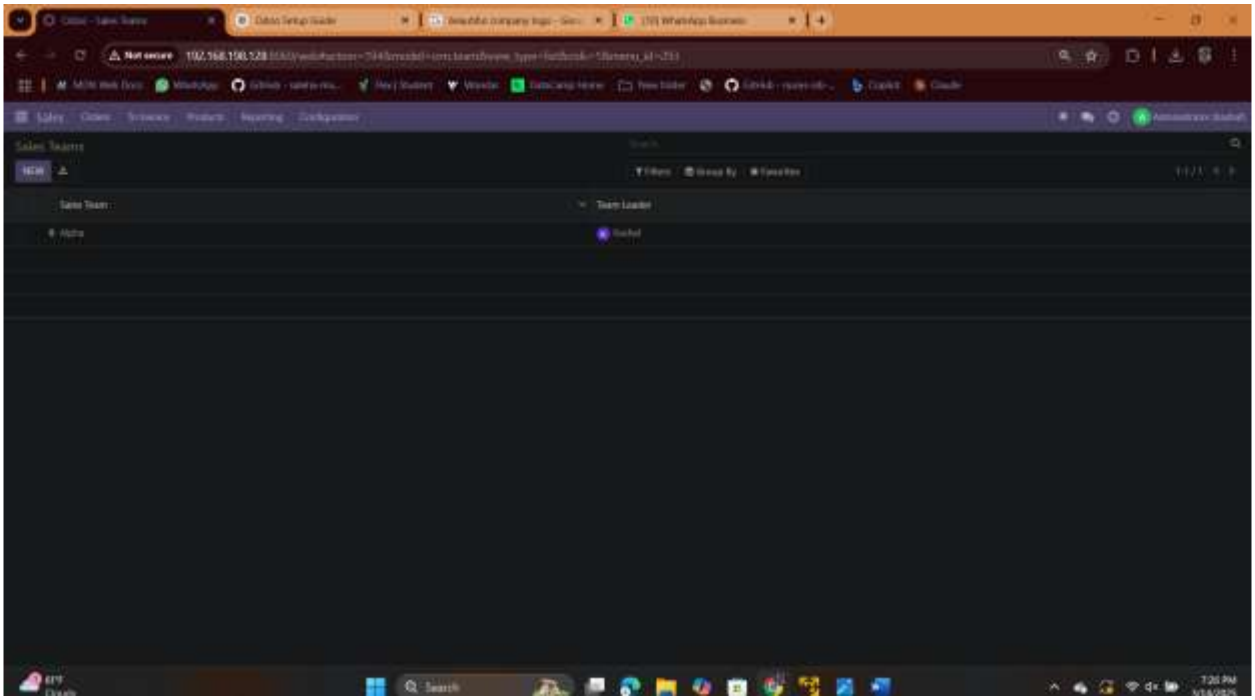
2.1 Creating and Configuring a Sales Team

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:
   - **Sales Team Name:** Alpha
   - **Assigned Members:** Added relevant sales representatives
   - **Invoicing Policy:** Configured based on business requirements
3. Clicked **Save** to finalize the sales team creation.



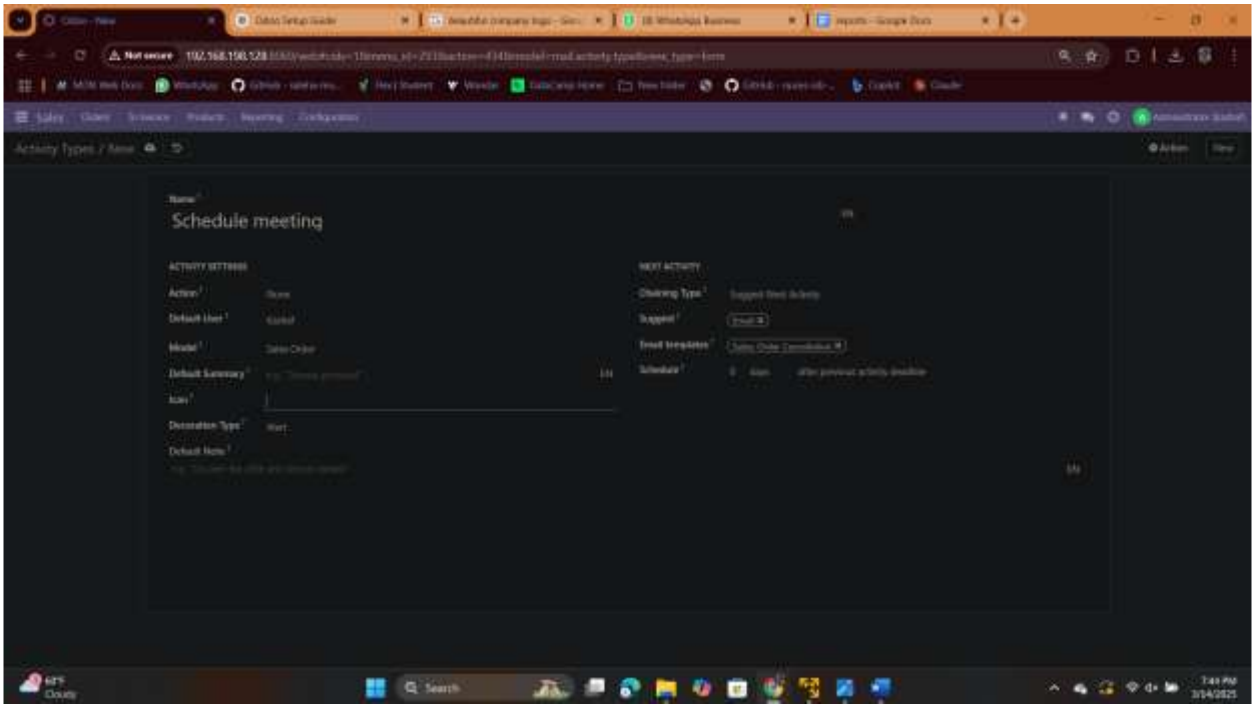


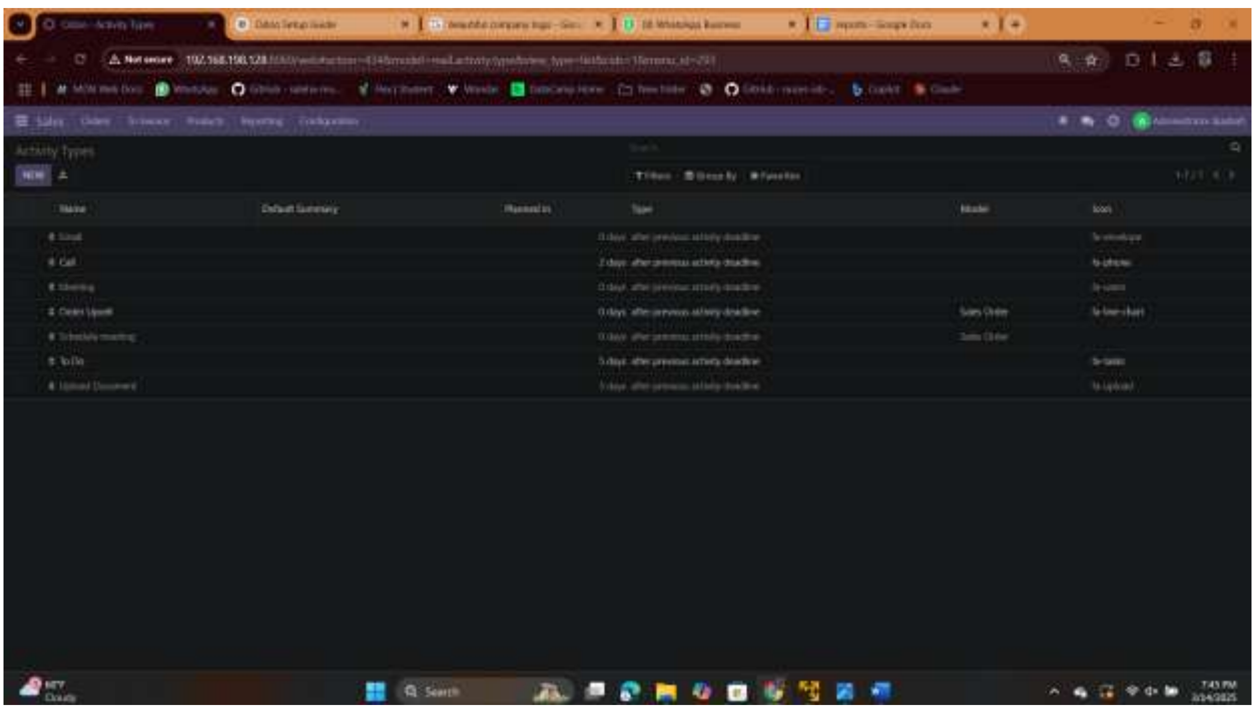
2.2 Creating a New Activity Type in Sales Configuration

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.





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.

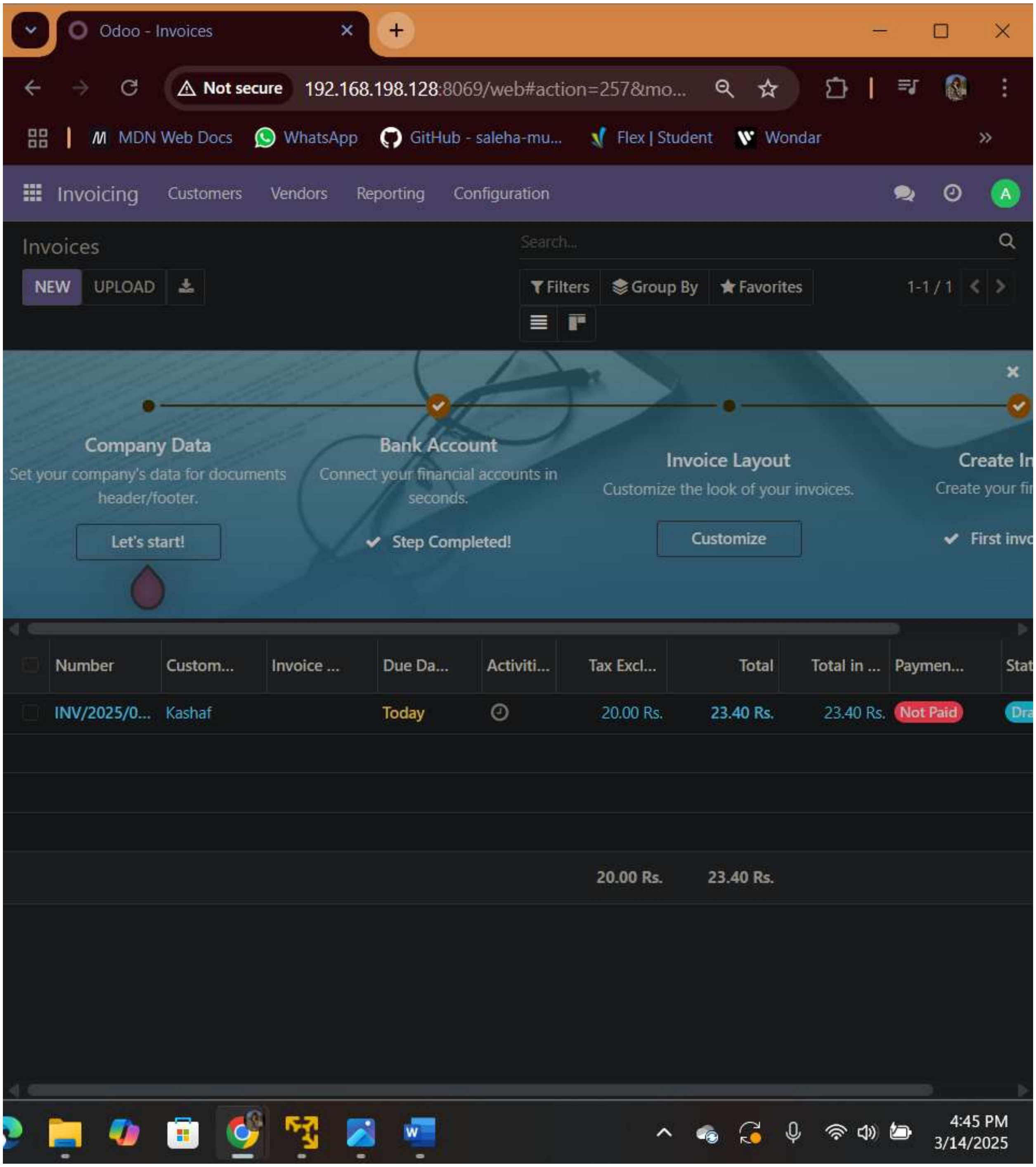
2.4 Enabling Sales Reports for Better Insights

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.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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
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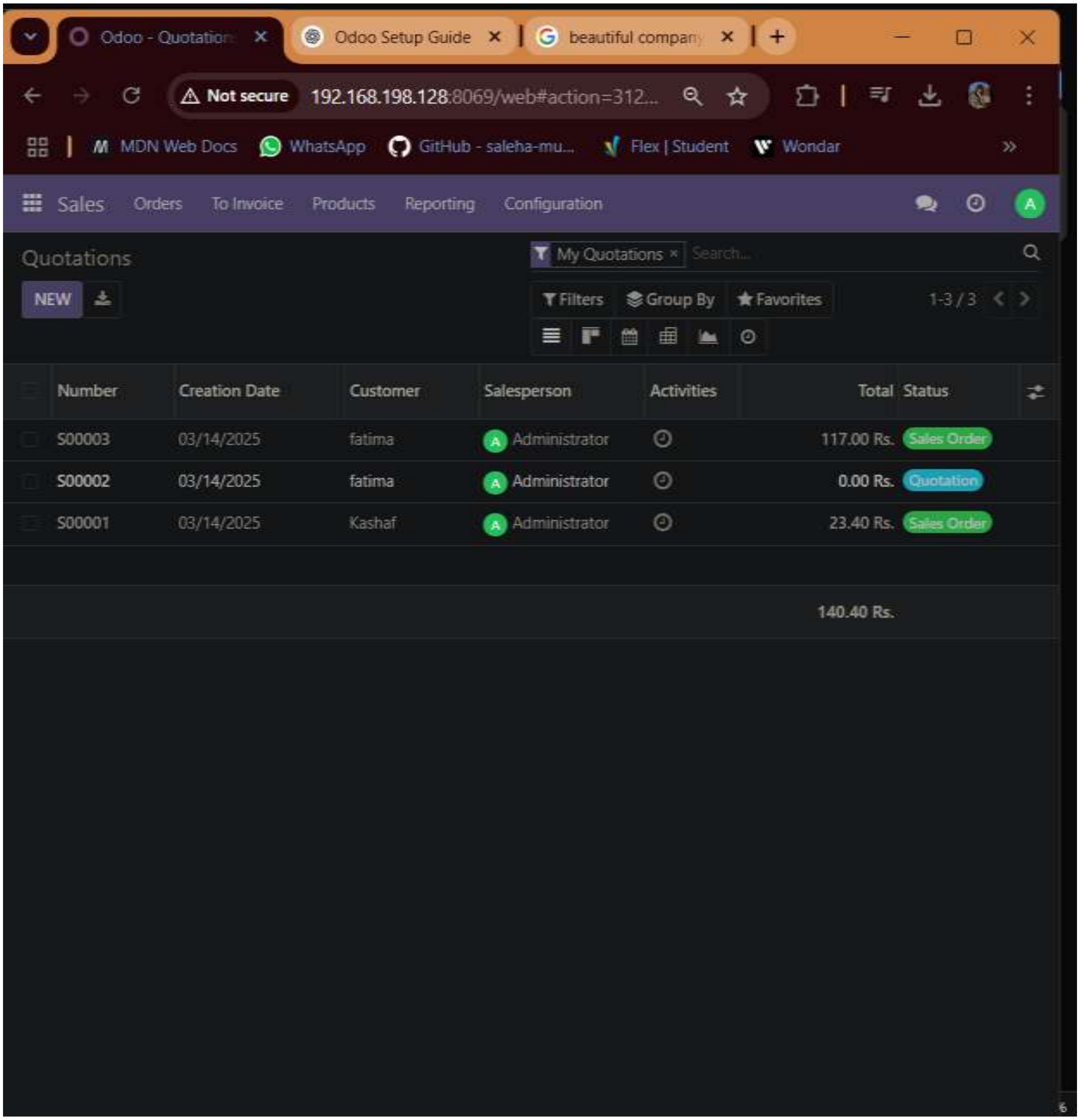
Odoo - Quotation
Odoo Setup Guide
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Number
Creation Date
Customer
Salesperson
Activities
Total
Status
S00003
03/14/2025
fatima
Administrator
117.00 Rs.
Sales Order
S00002
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Administrator
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Quotation
S00001
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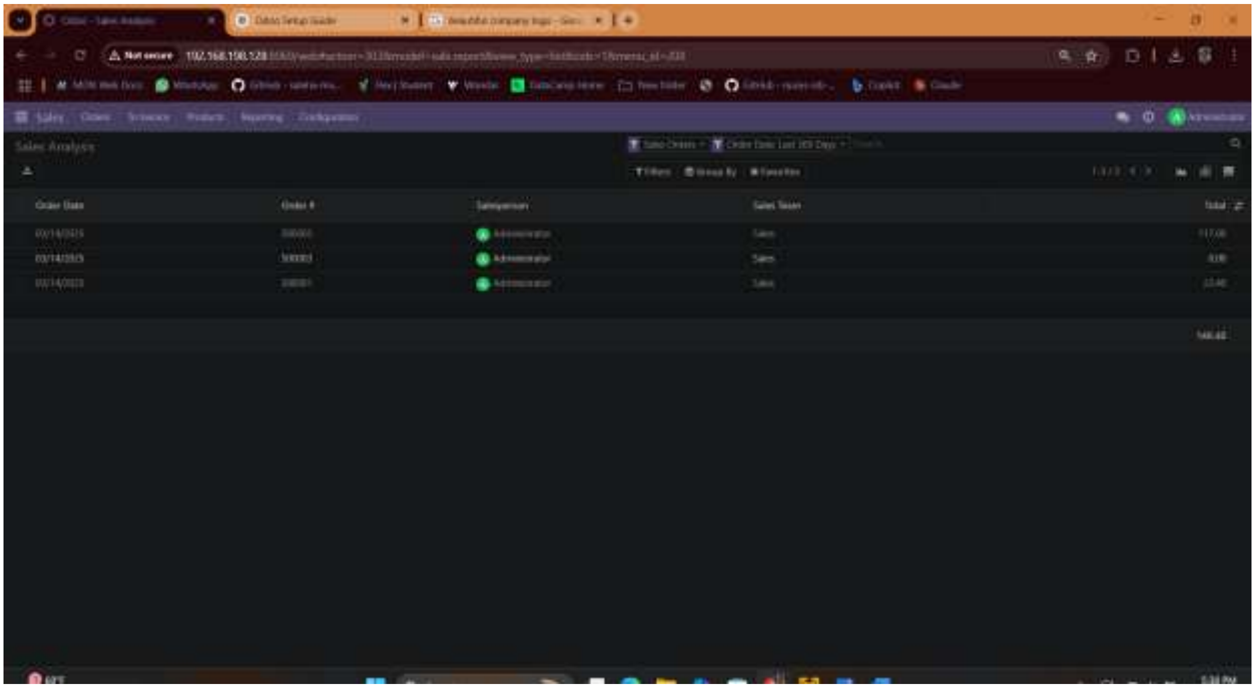
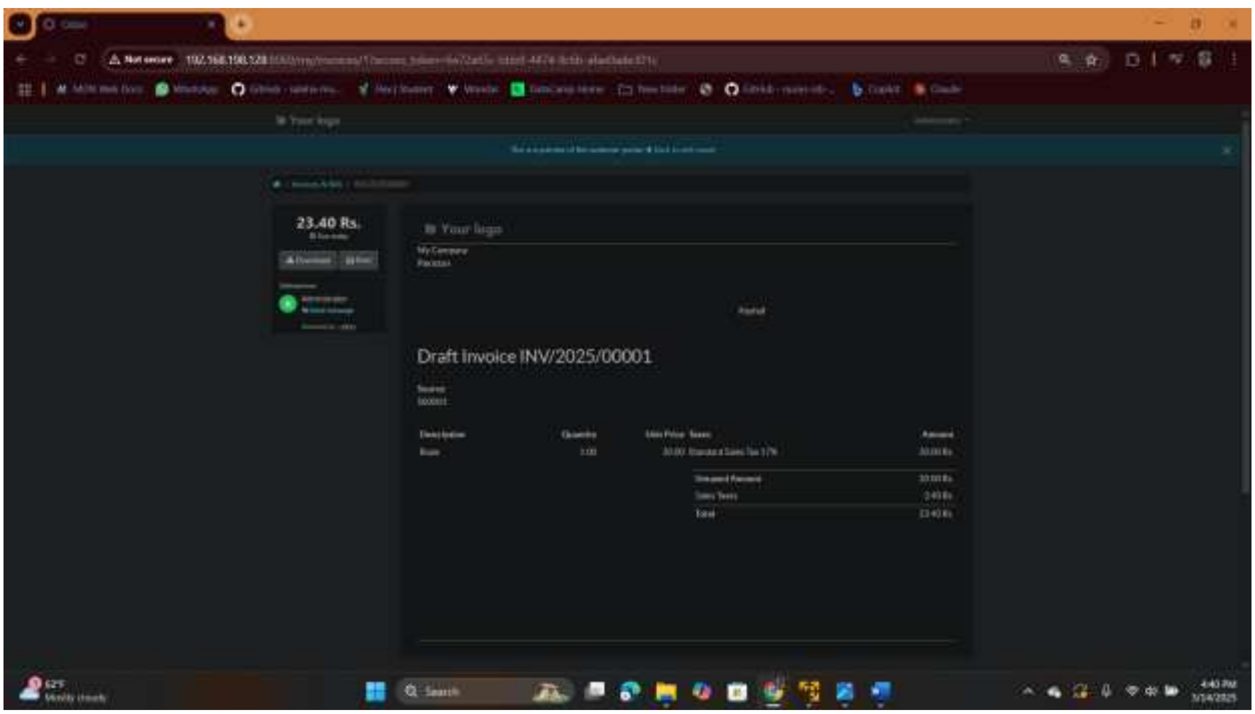
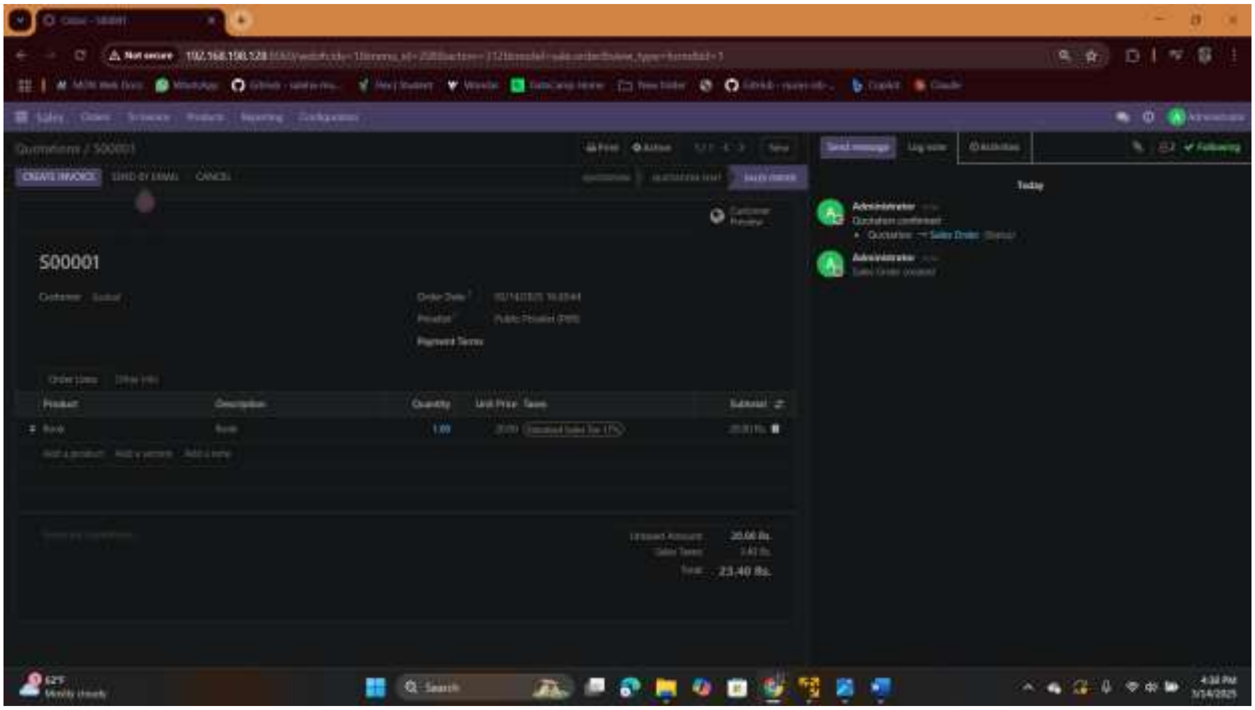
Kashaf
Administrator
23.40 Rs.
Sales Order
140.40 Rs.


Sales Analysis


Your logo
23.40 Rs.
Draft Invoice INV/2025/00001



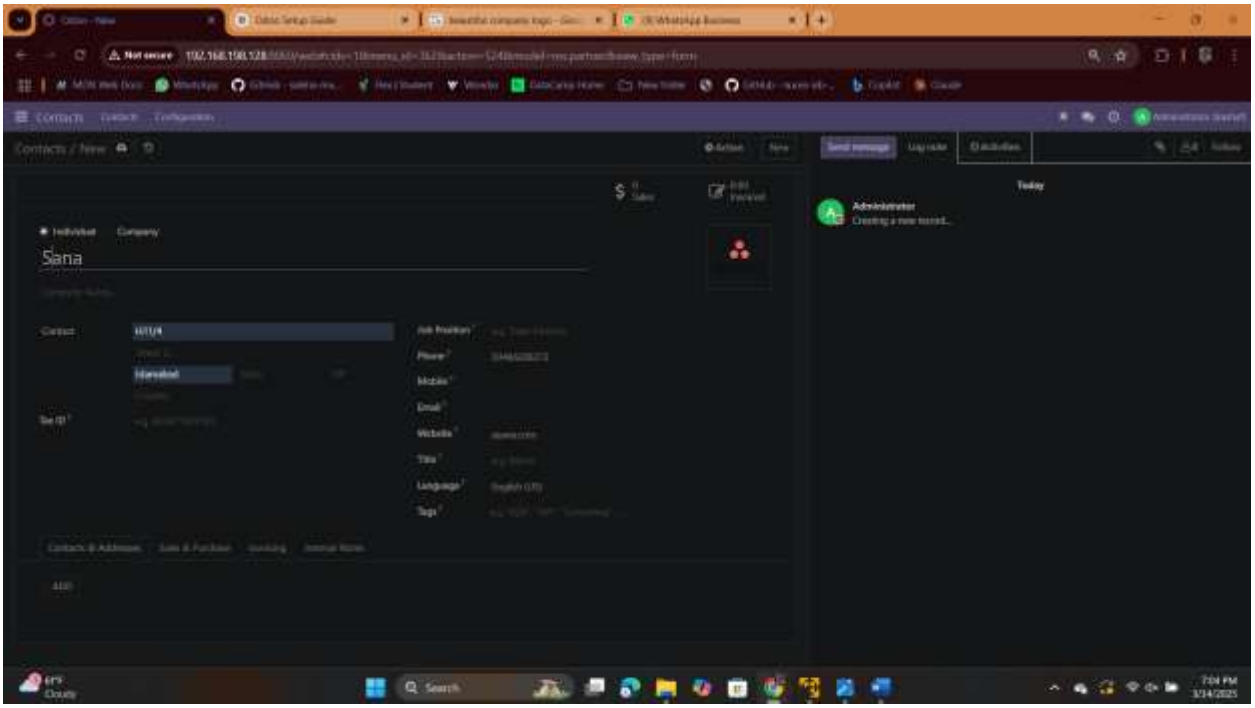
3. Customization in the Contacts Module

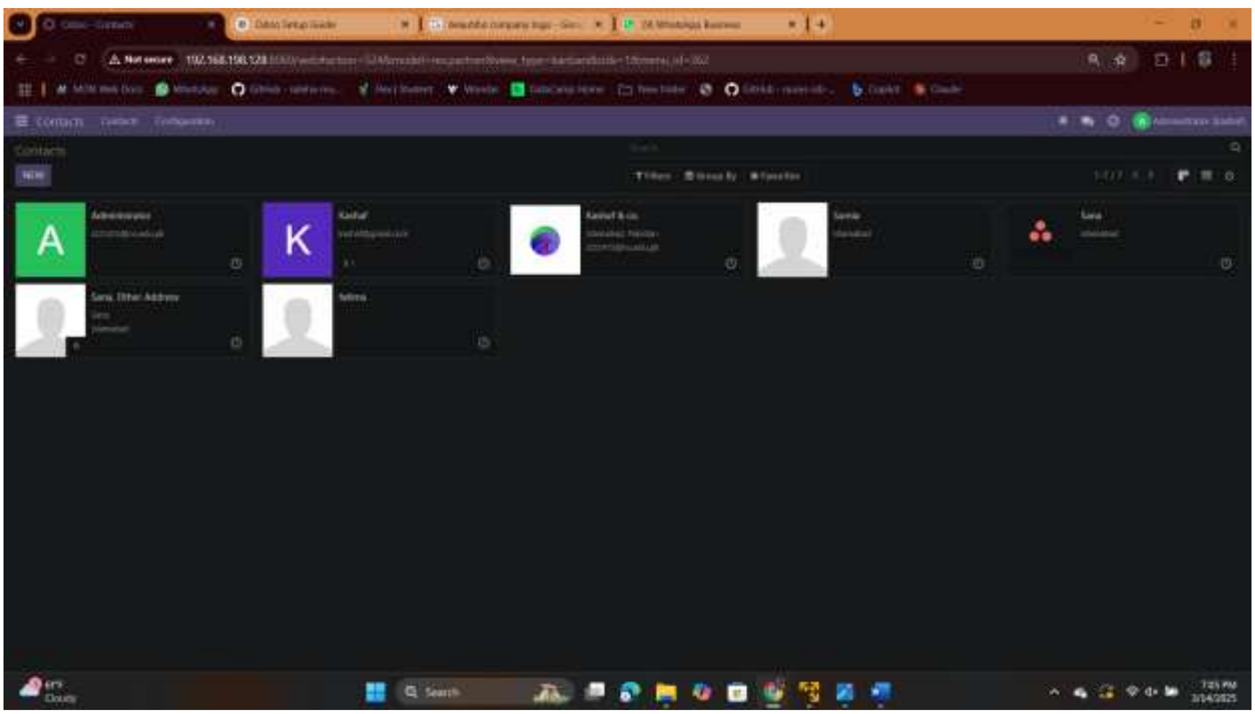
3.1 Adding New Customers & Team Members

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:
   - **Customer Name:** Kashaf
   - **Assigned Role & Channel:** Added Samia to the General Channel
3. Clicked **Save** to finalize the entries.





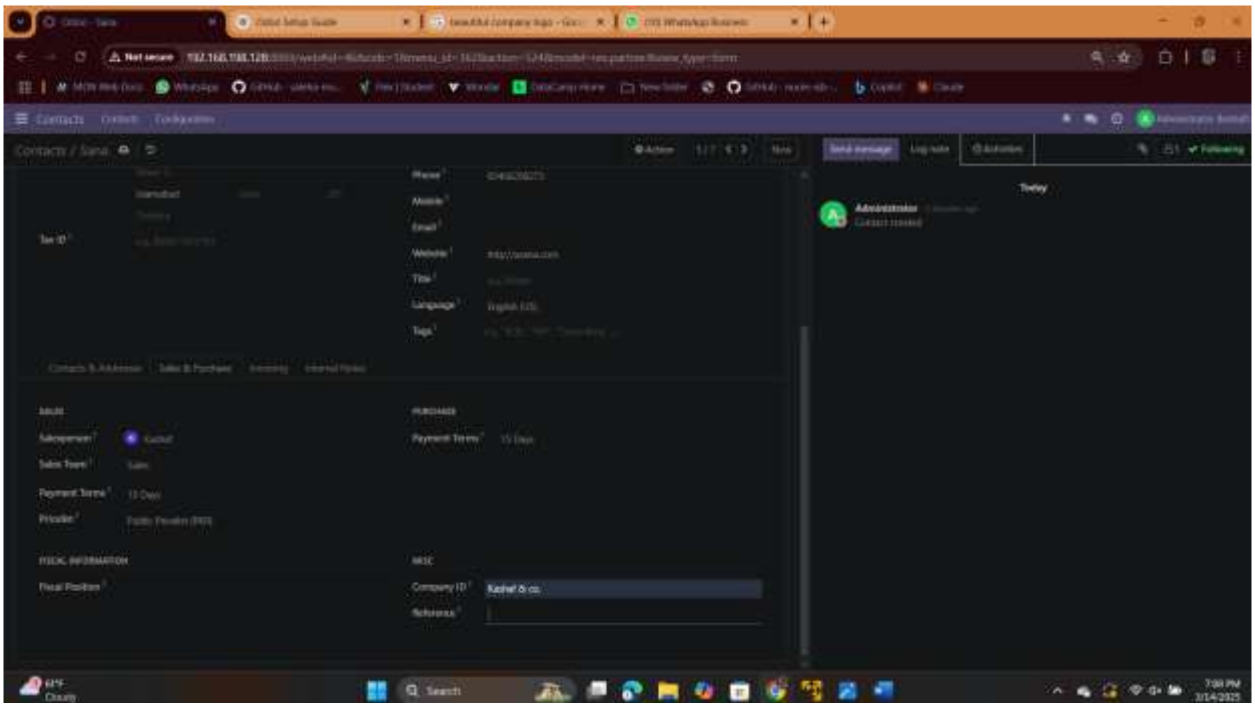
3.2 Categorizing Contacts for Better Management

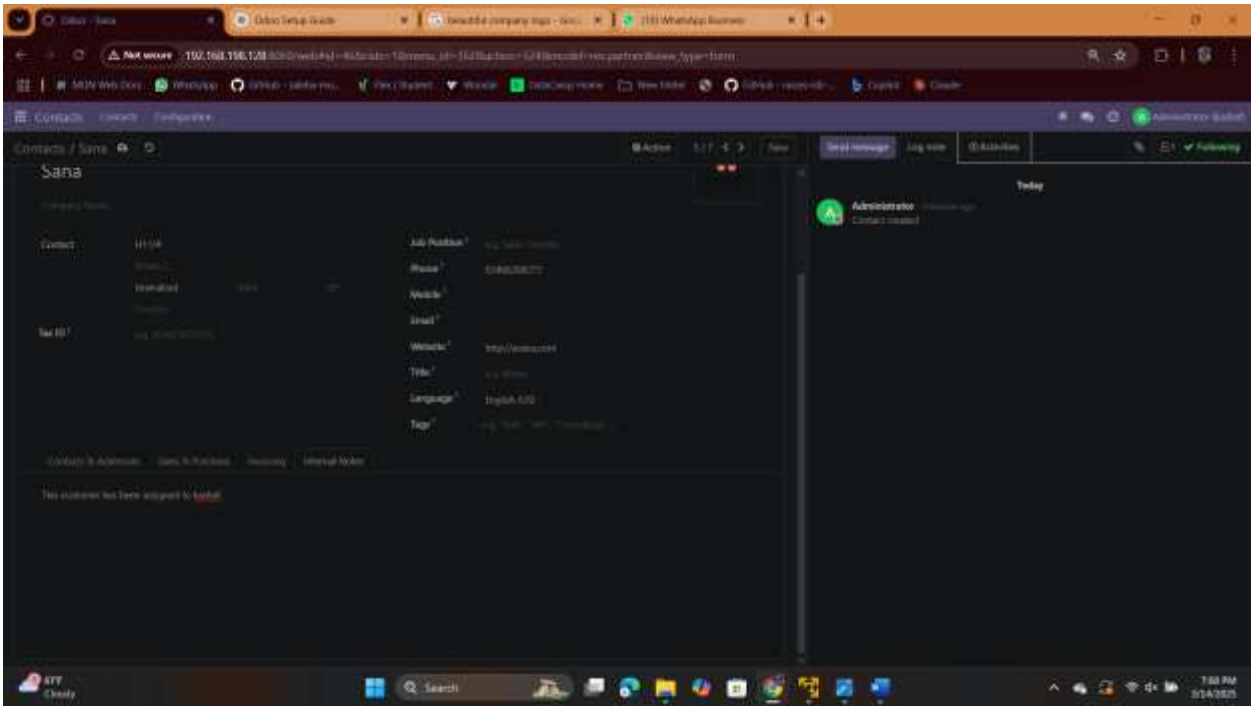
Objective: To segment contacts based on their role (Customer, Vendor, Supplier).

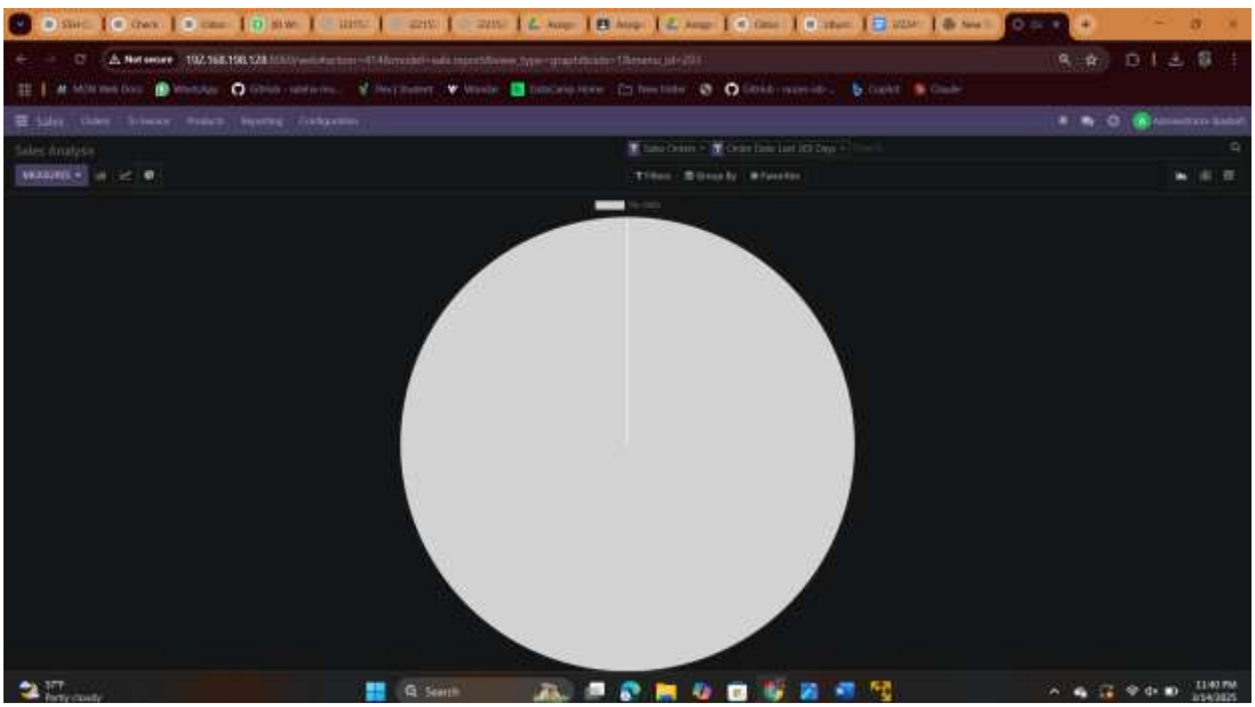
Steps:

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

Outcome: Categorized contacts for easier segmentation and sales tracking.





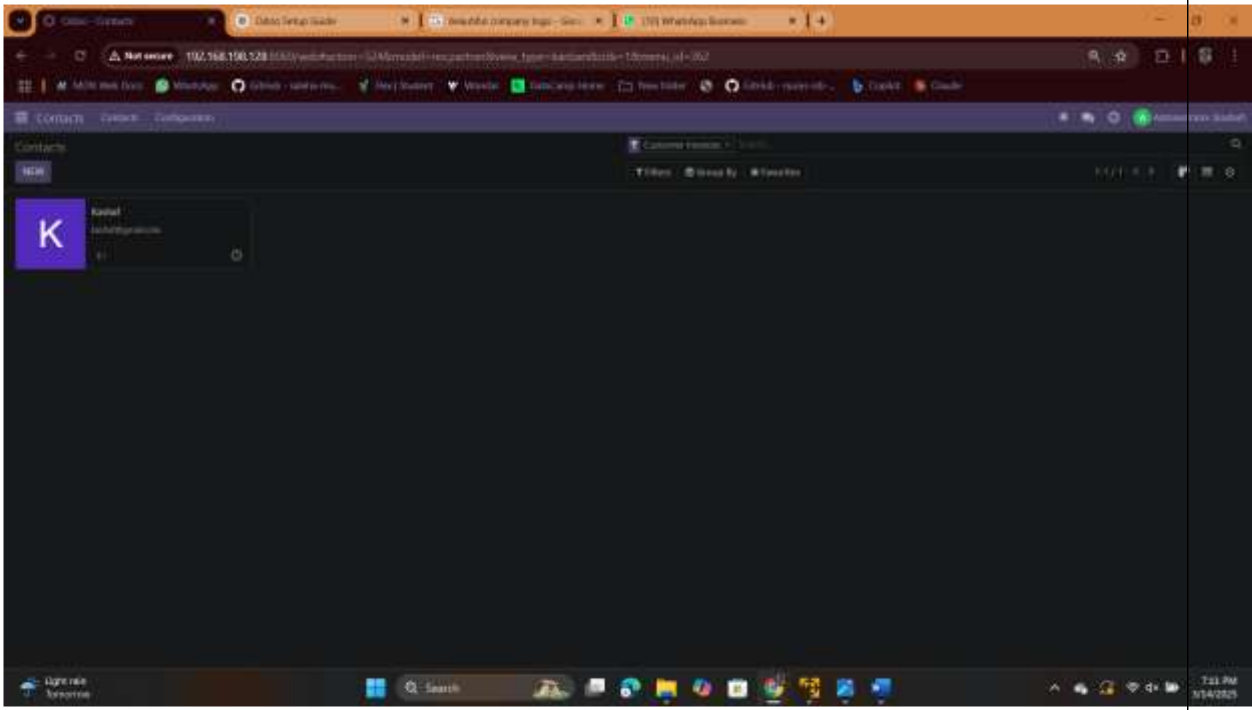


3.3 Customizing the Contact Search & Filtering

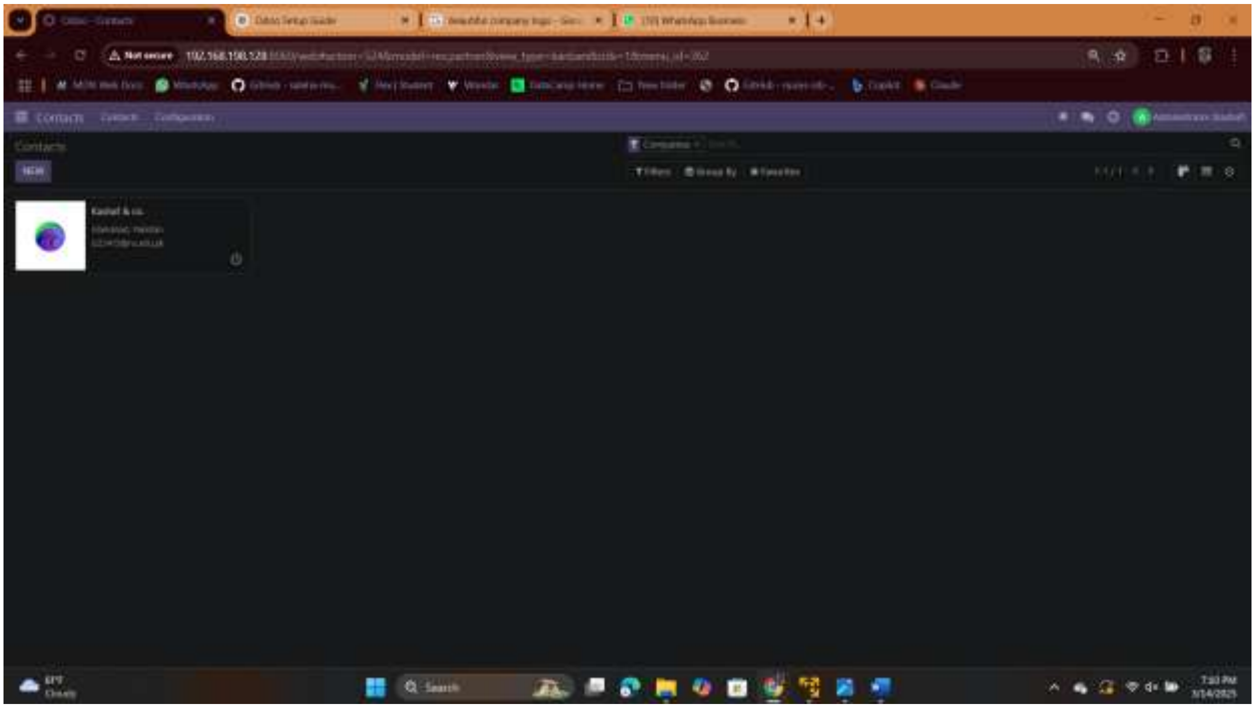
Objective: To efficiently search and filter contacts based on various criteria.

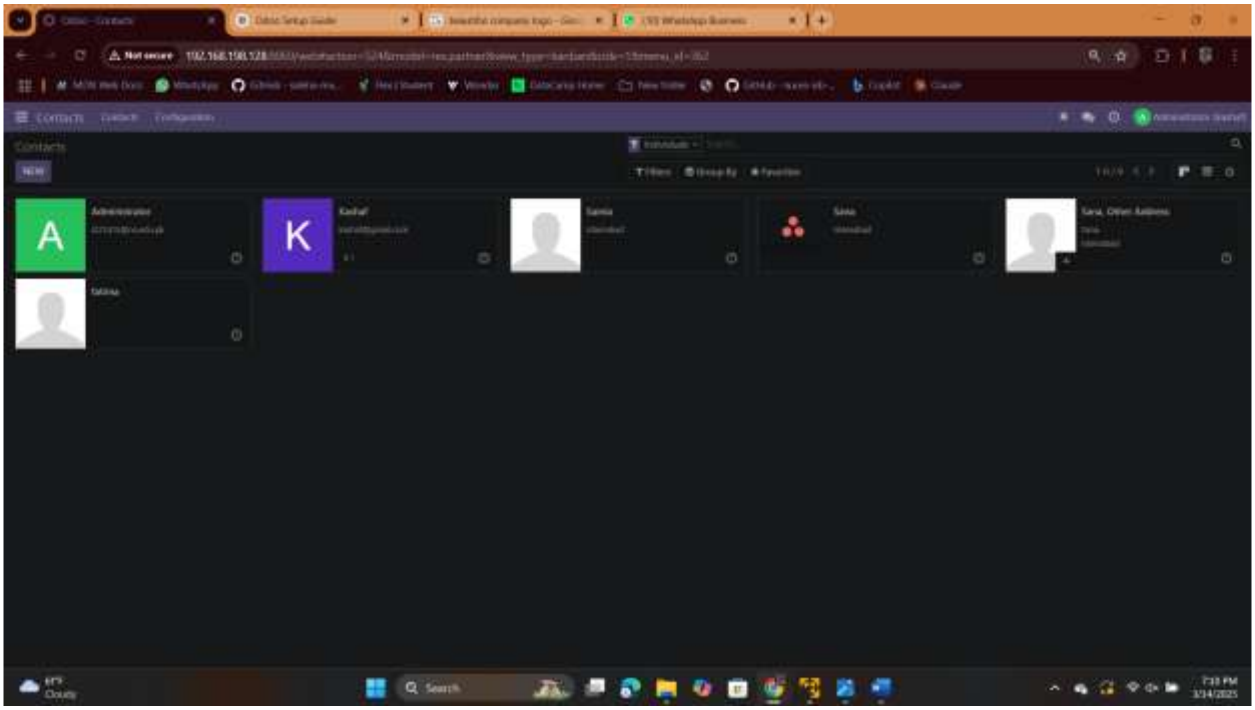
Steps:

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



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





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