Odoo ERP User Manual

Graduation Project
Implementation of Odoo Retail Management System

Business Study: Raneen Co.

DEPI - Odoo Application Consultant Track

Next Academy
NEXT13 _CAI1_ERP4_G1e
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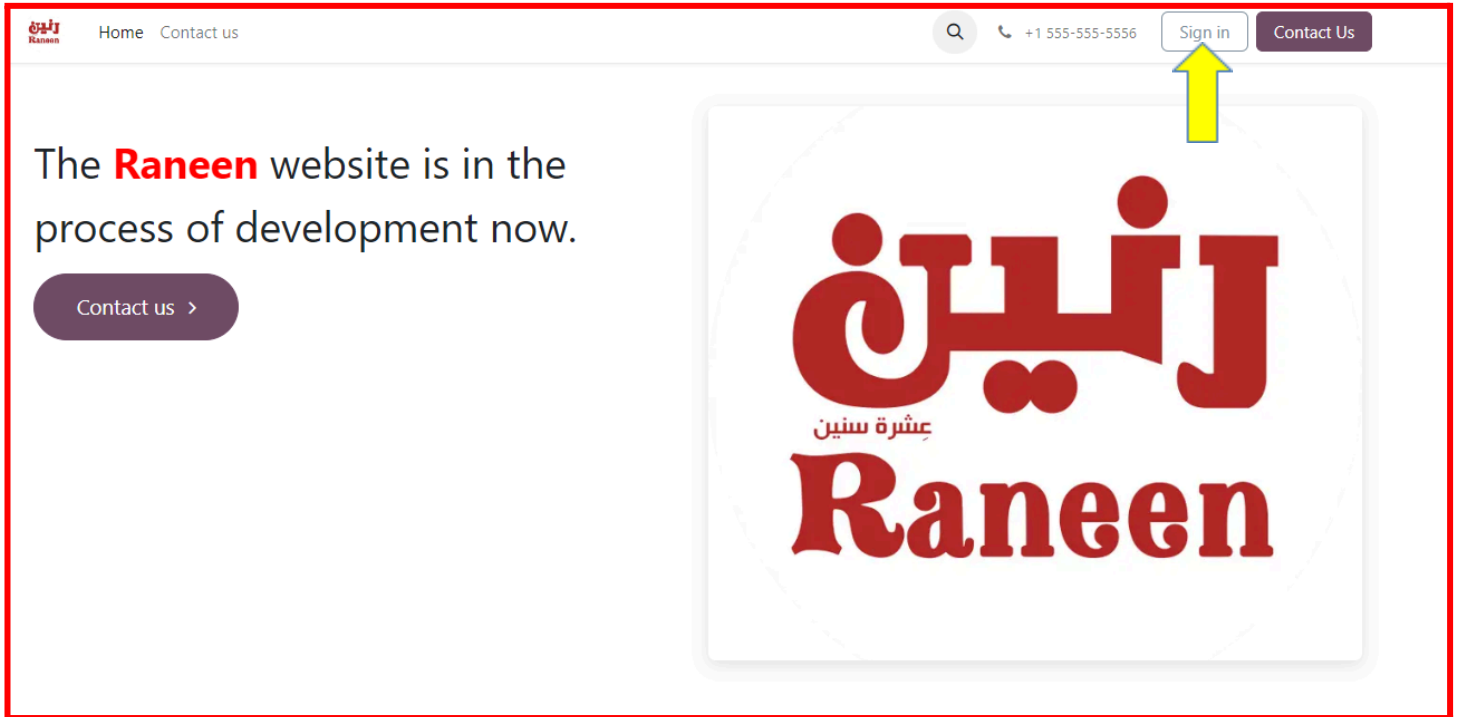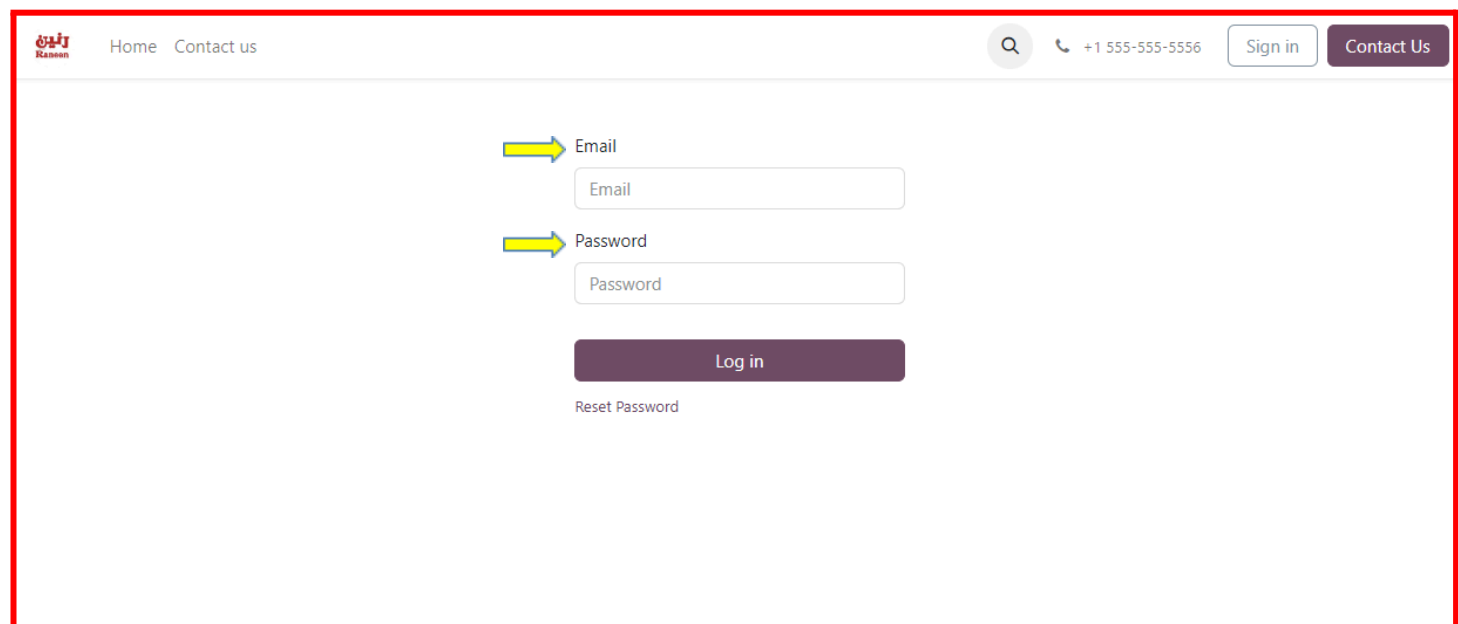# Table Of Content

1. Introduction

Welcome to the Odoo ERP system! This user manual is designed to guide Raneen's staff through the core functionalities of Odoo ERP, specifically focusing on Sales, Purchases, Inventory, and Accounting modules.
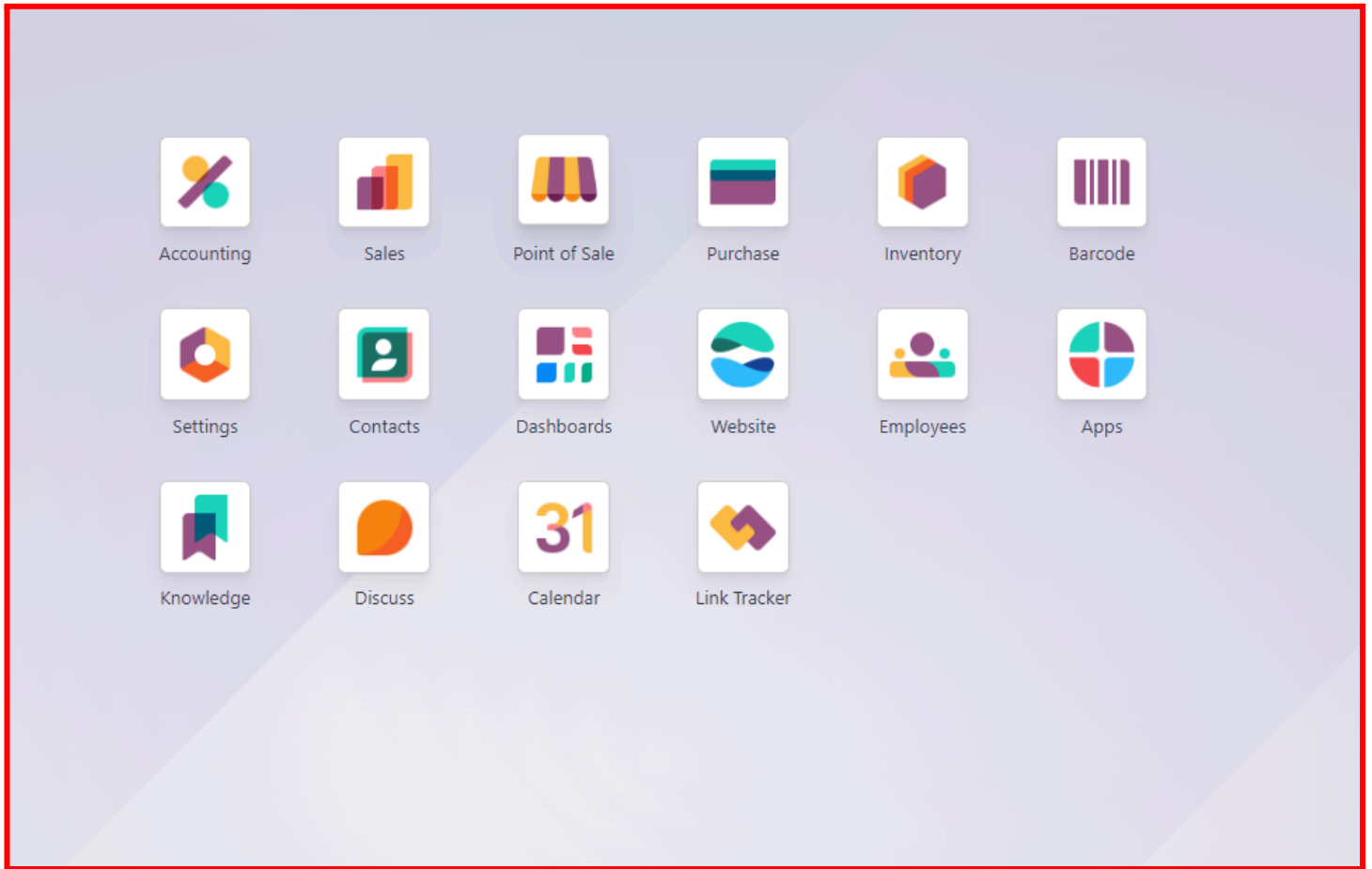
Open any web browser >> https://edu-raneen-test1.odoo.com

Login with your credential

Based on your **access rights**, you will see your modules

2. Sales Module

2.1 Creating a Sales Order

1. **Navigate to the Sales Module:**
   o Go to the main dashboard and click on the "Sales" icon.
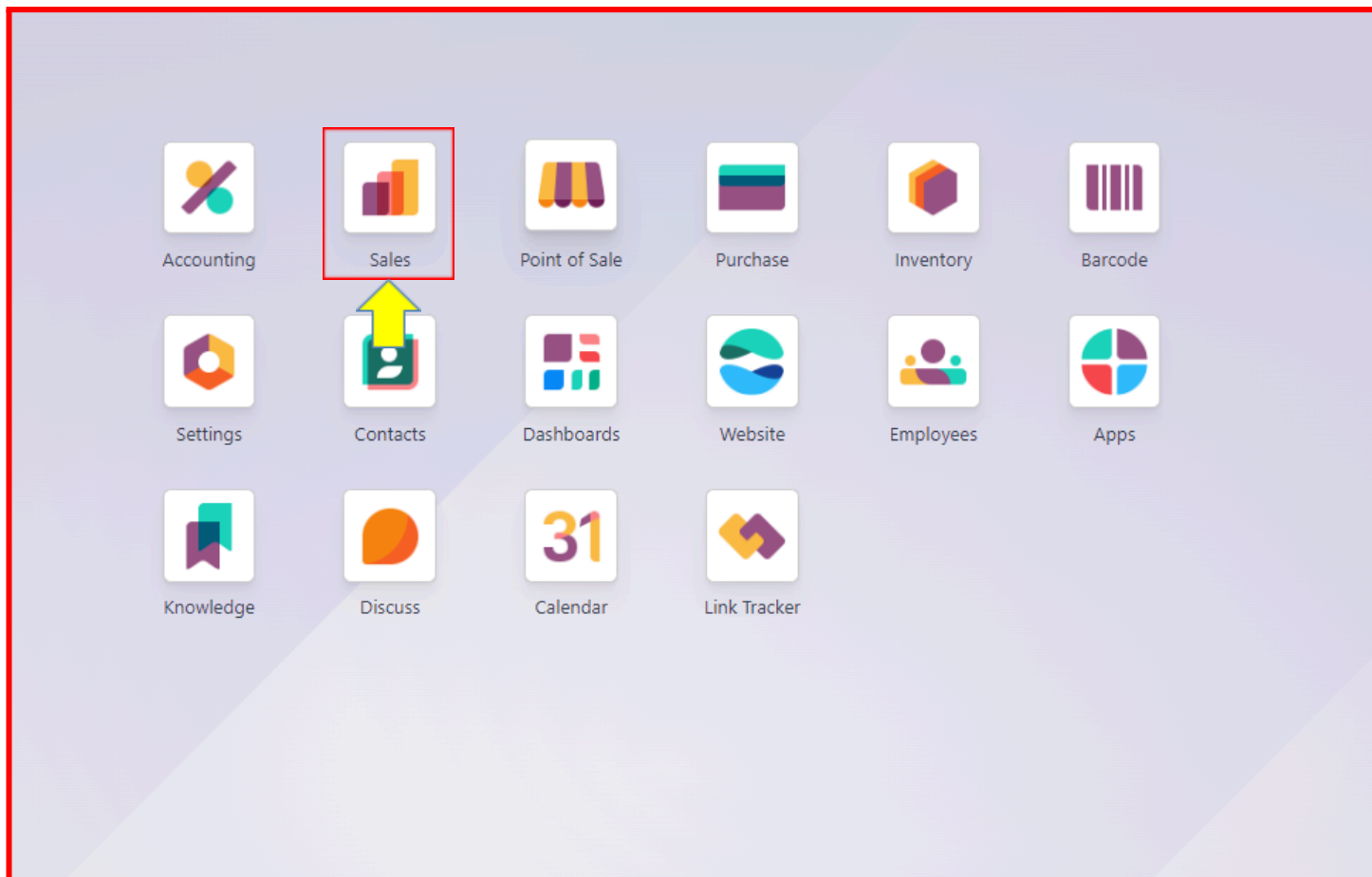
2. **Create a New Sales Order:**
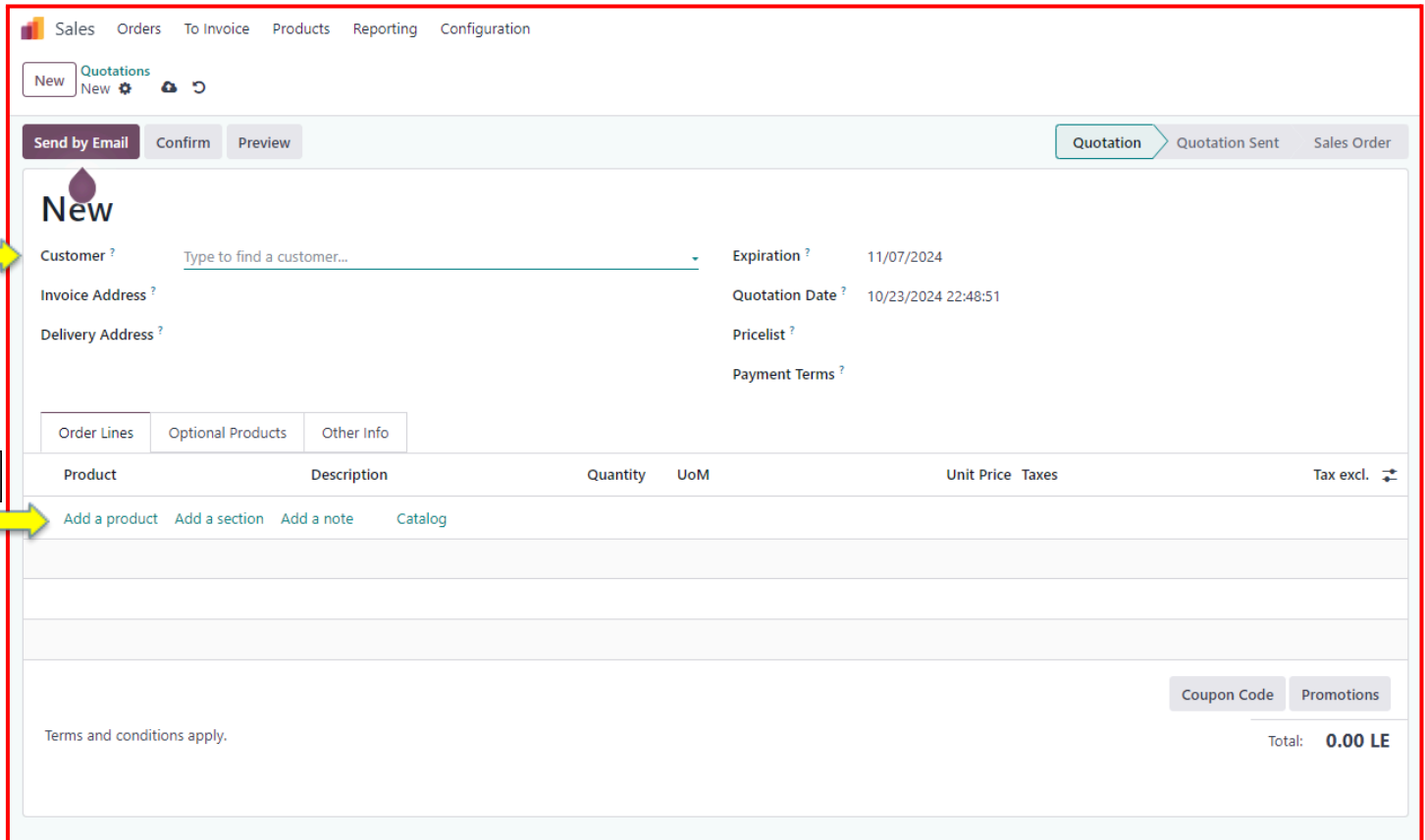   o Click the **Create** button in the Sales Order view.

3. **Add Customer Details:**
   o Select the customer from the drop-down list or create a new customer.
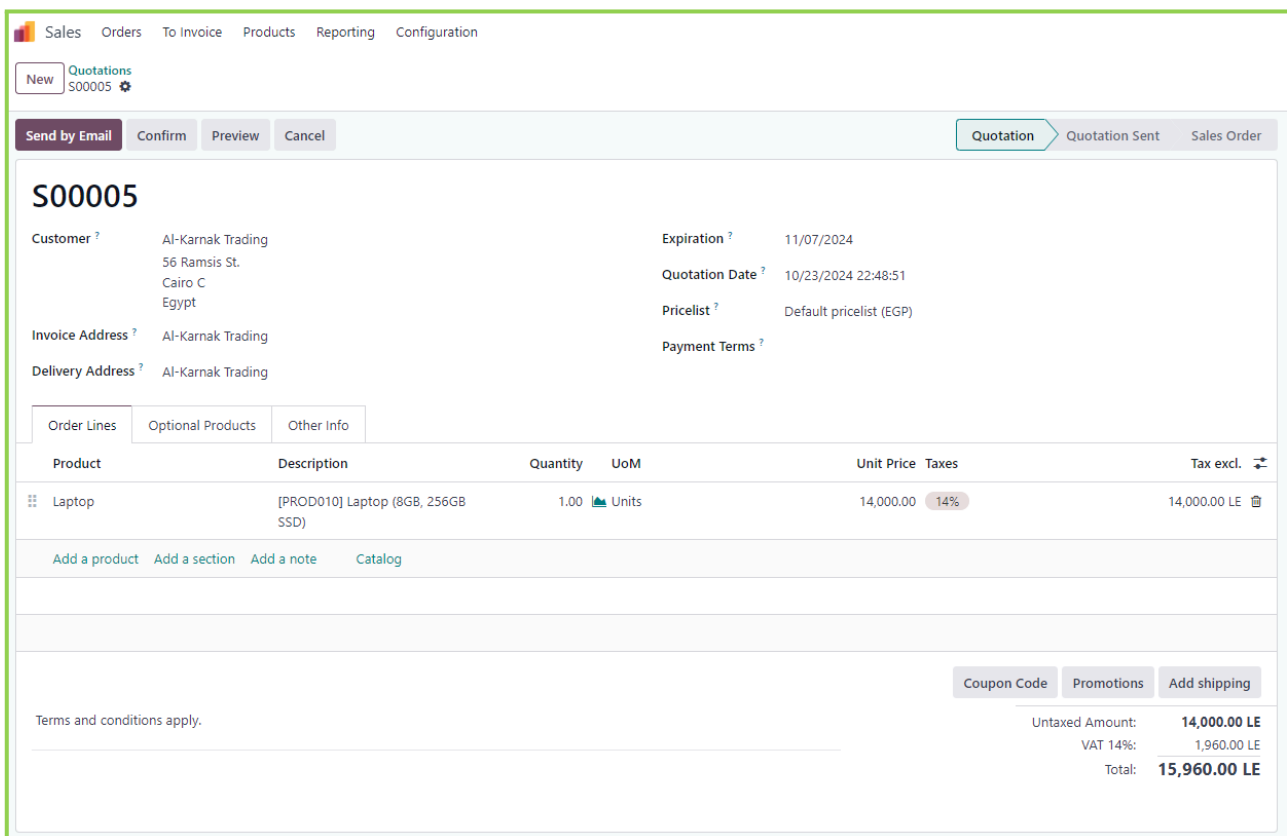
4. **Add Products:**
   o Click **Add a Product** and select the products for the order.
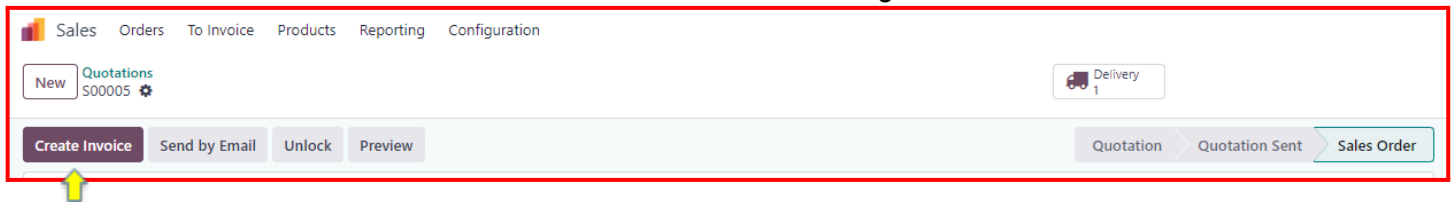

Example:

Confirm the Sales Order:

- o Click **Confirm** to finalize the order.
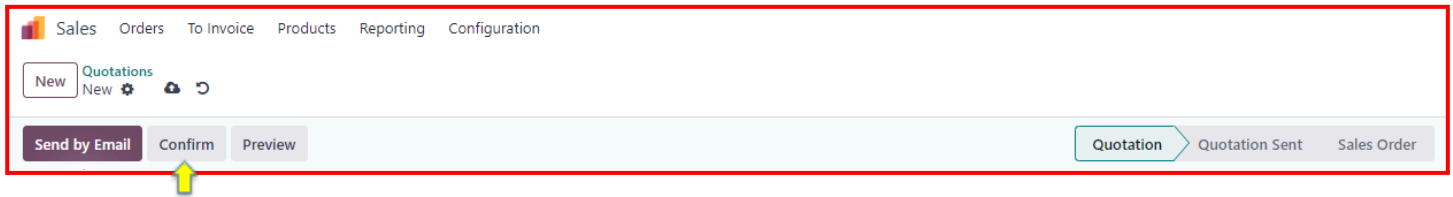
5. **Generate an Invoice:**

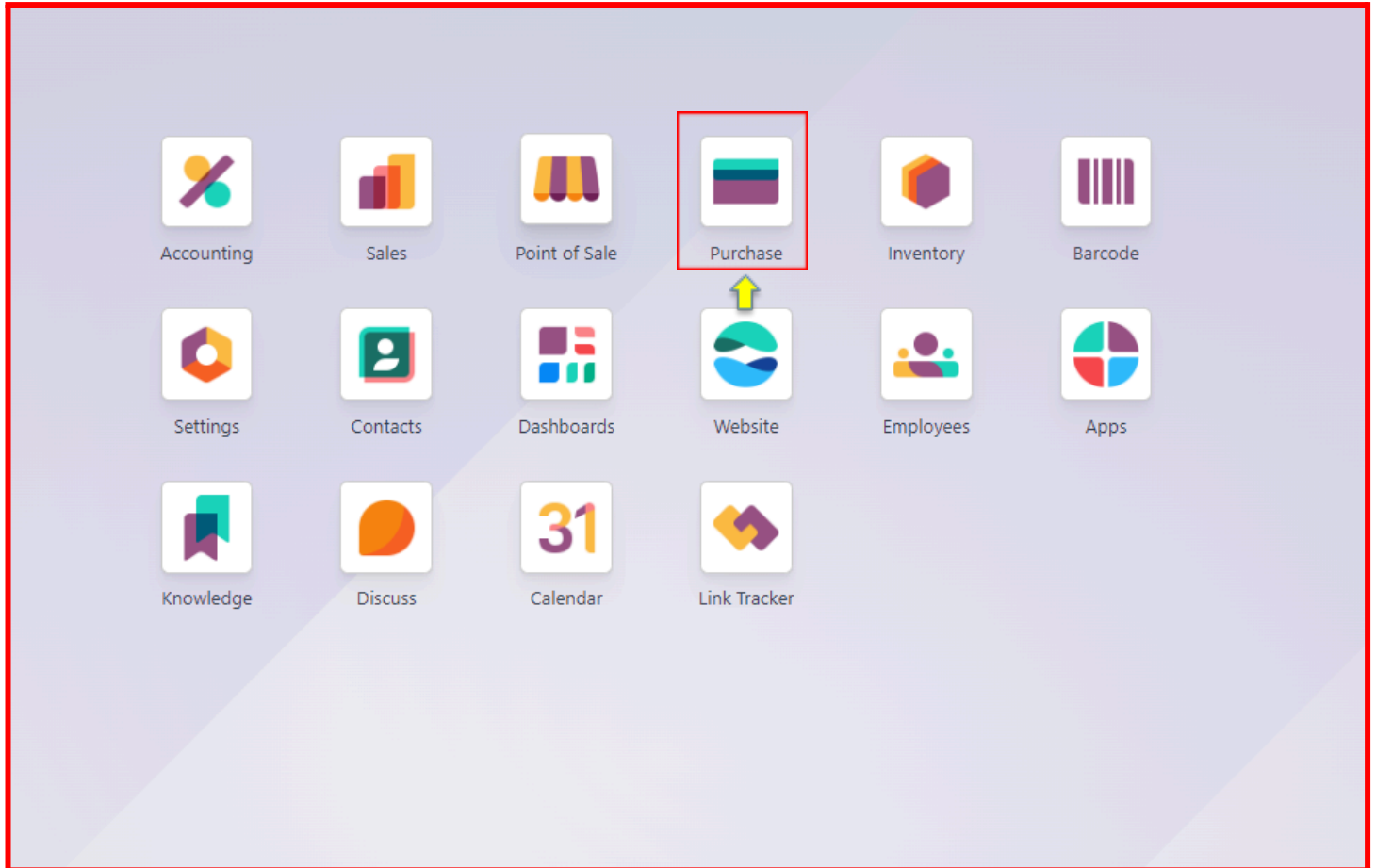- o Go to the "Invoices" tab and click **Create Invoice** to generate the customer invoice.

3. Purchases Module

3.1 Creating a Purchase Order

1. **Navigate to the Purchases Module:**
   o Click on the "Purchases" icon from the main dashboard.

2. **Create a New Purchase Order:**
   o Click **Create** to initiate a new purchase order.

3. Add Vendor and Products:

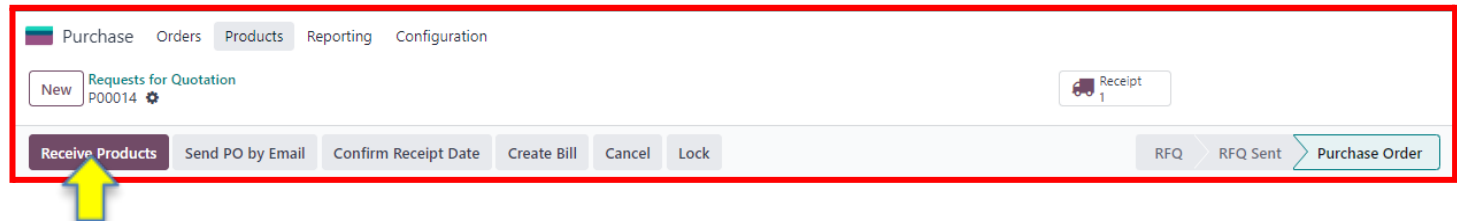o Select a vendor and add the items you are purchasing.

Example:

4. **Confirm the Purchase Order:**
   - Once the order is reviewed, click **Confirm** to validate.

5. **Receive Products:**
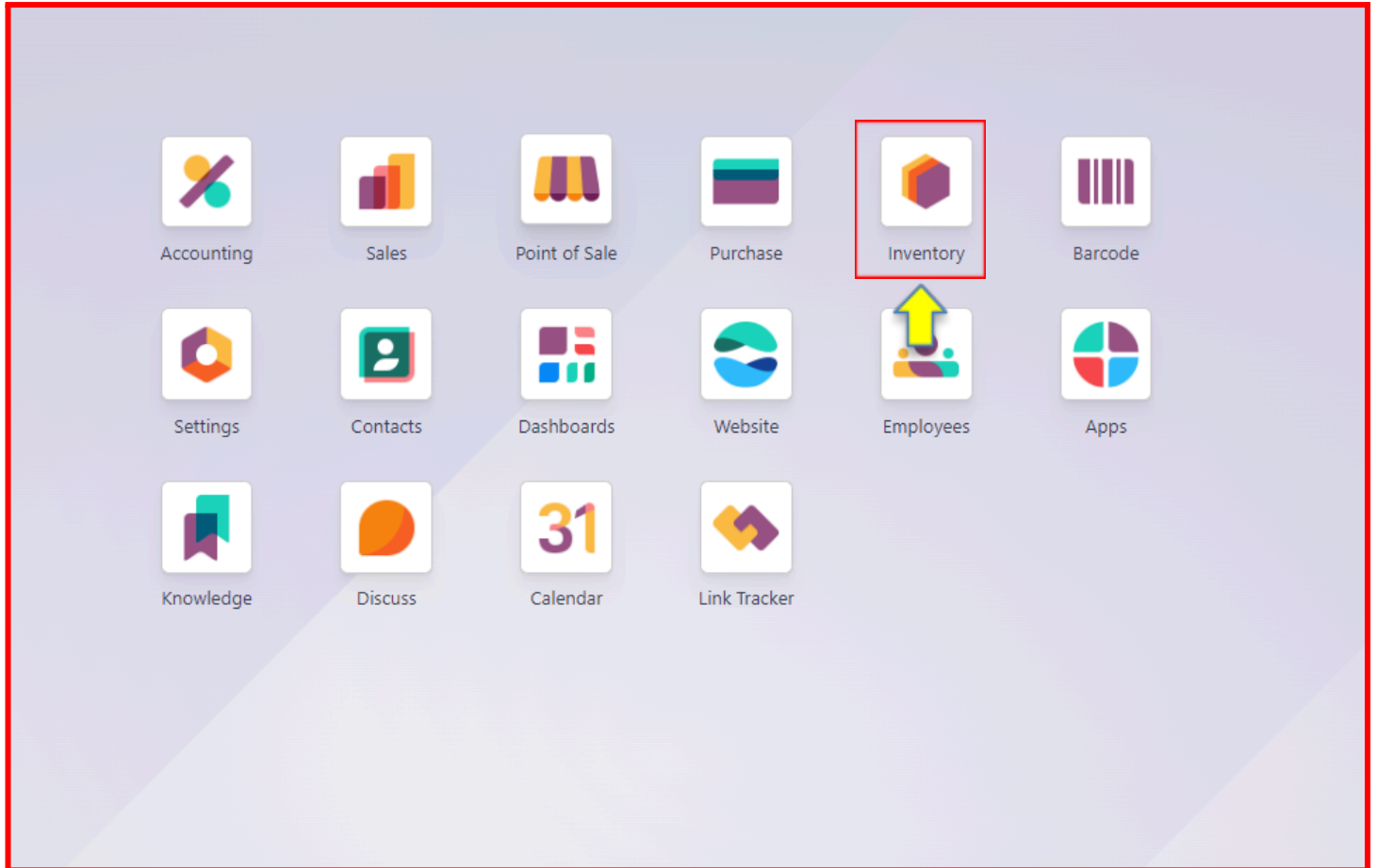   - After confirmation, click on **Receive Products** to register the incoming shipment.
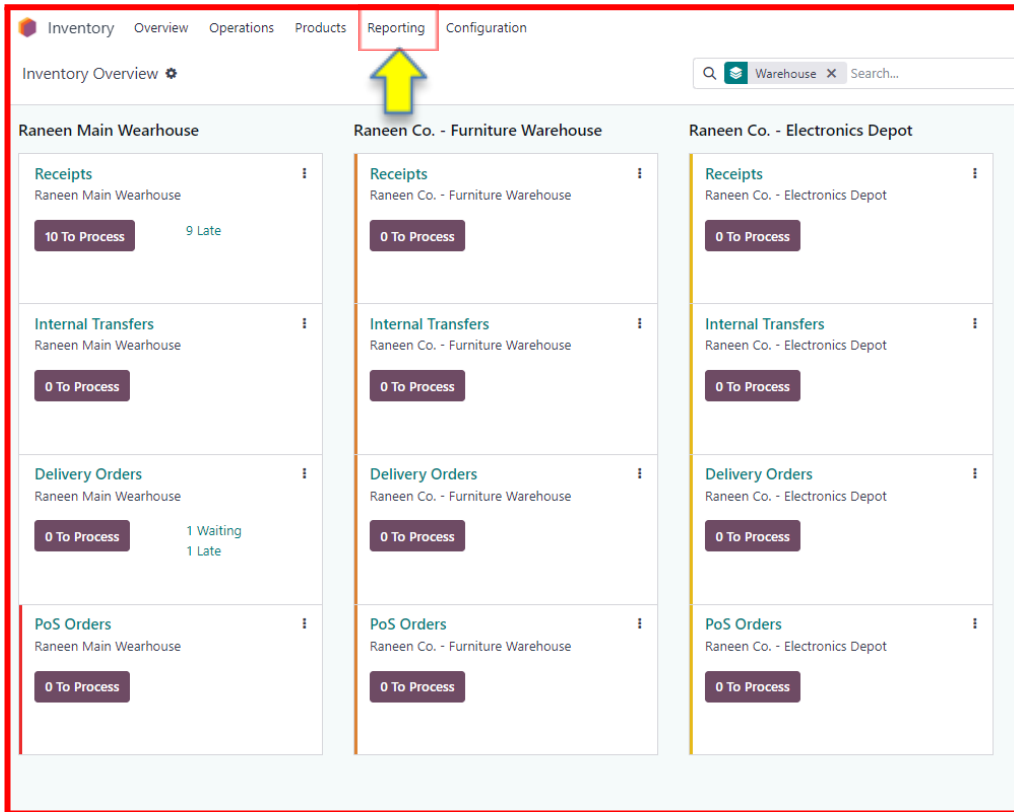
4. Inventory Module

4.1 Managing Inventory

1. **Navigate to the Inventory Module:**
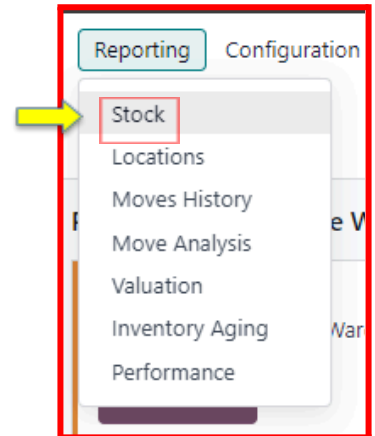   - Click on the "Inventory" icon from the main dashboard.

2. Checking Stock Levels:

o   In the **Inventory Dashboard**, go to **Reporting** view **stock** levels for all products.

Product	Unit Cost	Total Value	On Hand	Reordering Min Qty	Free to Use	Incoming	Outgoing	Unit			
[PROD001] LED TV (55)	7,500.00 LE	1,132,500.00 LE	151.00	50.00	151.00	0.00	0.00	Units	History	Replenishment	Locations
[PROD002] Refrigerator (350L)	6,500.00 LE	65,000.00 LE	10.00	10.00	10.00	80.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD003] Air Conditioner (1.5HP)	8,000.00 LE	560,000.00 LE	70.00	20.00	70.00	1.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD004] Sofa Set (Brown)	10,000.00 LE	100,000.00 LE	10.00	10.00	10.00	30.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD005] Washing Machine (6KG)	5,800.00 LE	255,200.00 LE	44.00	40.00	44.00	65.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD006] Dining Table Set (4Seaters)	9,000.00 LE	189,000.00 LE	21.00	20.00	21.00	39.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD007] Smartphone (64GB)	10,000.00 LE	250,000.00 LE	25.00	25.00	25.00	150.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD007] Smartphone (256GB)	0.00 LE	0.00 LE	26.00	25.00	26.00	0.00	0.00	Units	History	Replenishment	Locations
[PROD008] Microwave Oven (20L)	2,300.00 LE	23,000.00 LE	10.00	10.00	10.00	91.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD009] Mattress (Queen)	6,500.00 LE	71,500.00 LE	11.00	10.00	11.00	70.00	0.00	Units	History	Replenishment	Locations Forecast
[PROD010] Laptop (8GB, 256GB SSD)	12,701.61 LE	393,750.00 LE	31.00	25.00	31.00	45.00	1.00	Units	History	Replenishment	Locations Forecast
Dining Table Set (6Seaters)	0.00 LE	0.00 LE	0.00	0.00	0.00	1.00	0.00	Units	History	Replenishment	Forecast
Laptop (16GB, 256GB SSD)	14,490.00 LE	144,900.00 LE	10.00	0.00	10.00	0.00	0.00	Units	History	Replenishment	Locations
Laptop (8GB, 512GB SSD)	12,075.00 LE	120,750.00 LE	10.00	0.00	10.00	0.00	0.00	Units	History	Replenishment	Locations
Laptop (16GB, 512GB SSD)	14,490.00 LE	144,900.00 LE	10.00	0.00	10.00	0.00	0.00	Units	History	Replenishment	Locations
Smartphone (128GB)	0.00 LE	0.00 LE	0.00	0.00	0.00	0.00	0.00	Units	History	Replenishment	
		3,450,500.00 LE	439.00		439.00	572.00	1.00				

3. Product Movements:
- o Track incoming and outgoing product movements.

4. Internal Transfers:

- o To transfer products between warehouses, click **Transfers** and initiate an internal transfer.

5. Accounting Module

5.1 <mark>Creating Customer Invoices</mark>

1. **Navigate to the Accounting Module:**
    o Go to the "Accounting" module from the main **dashboard** >> **Customer** > **Invoices**.

Now, Select **New**
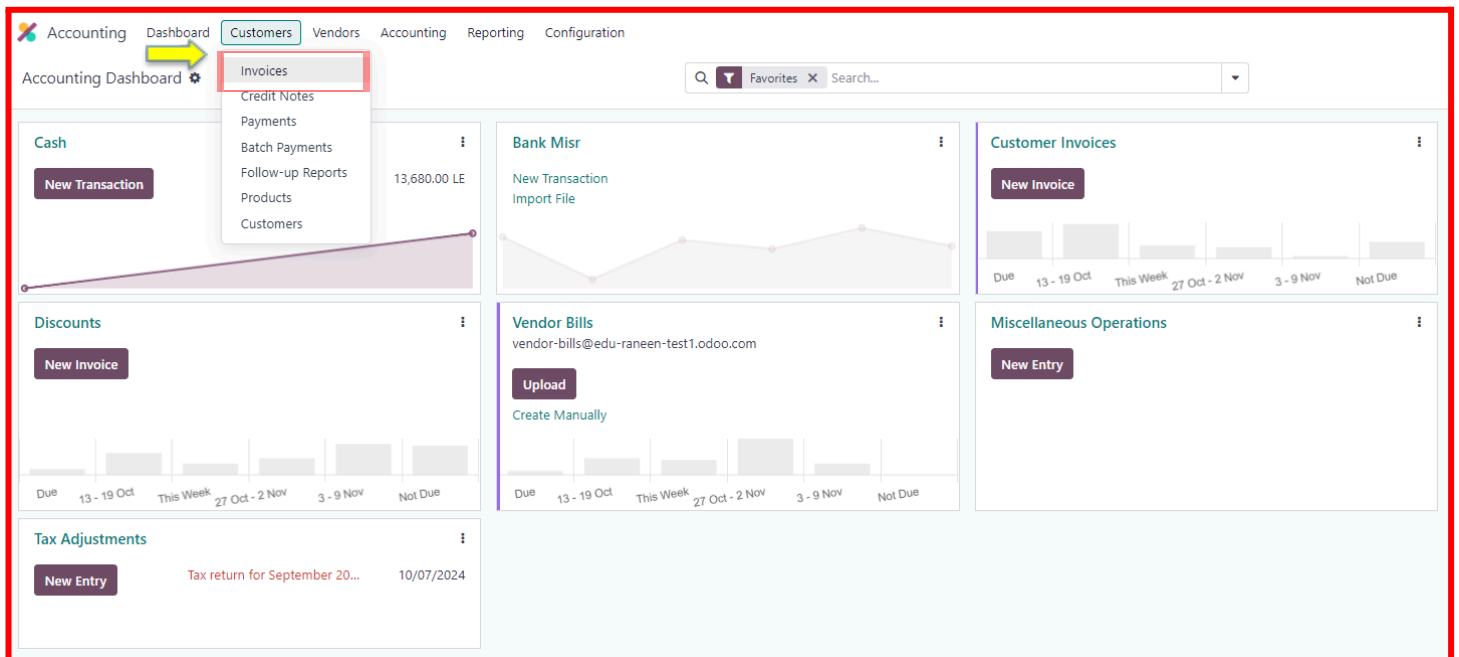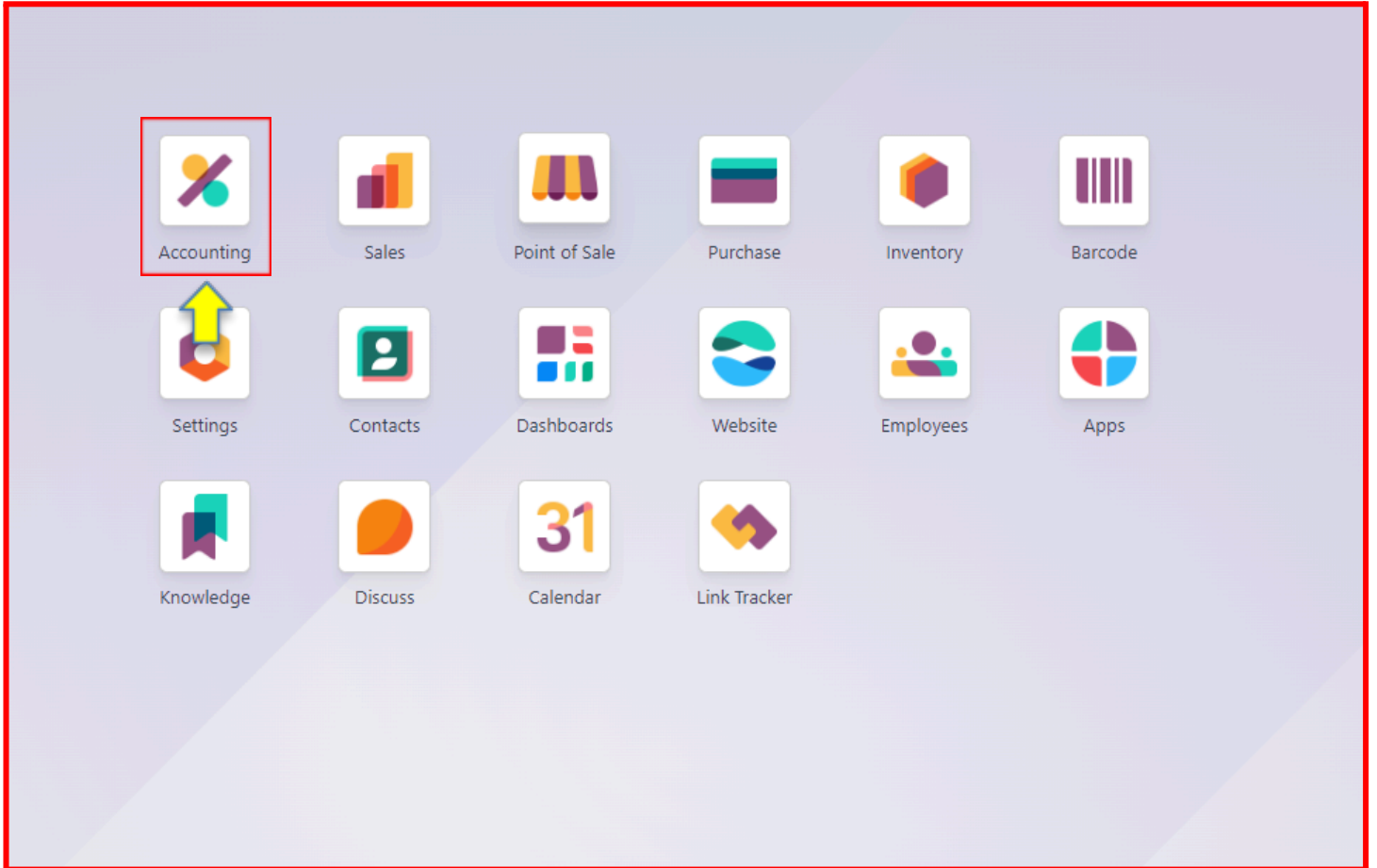
Complete the invoice data

Example:

Generate Invoices:

- o Click **Customer Invoices** >> **Confirm** > to generate a new invoice.

2. **Register Payments:**

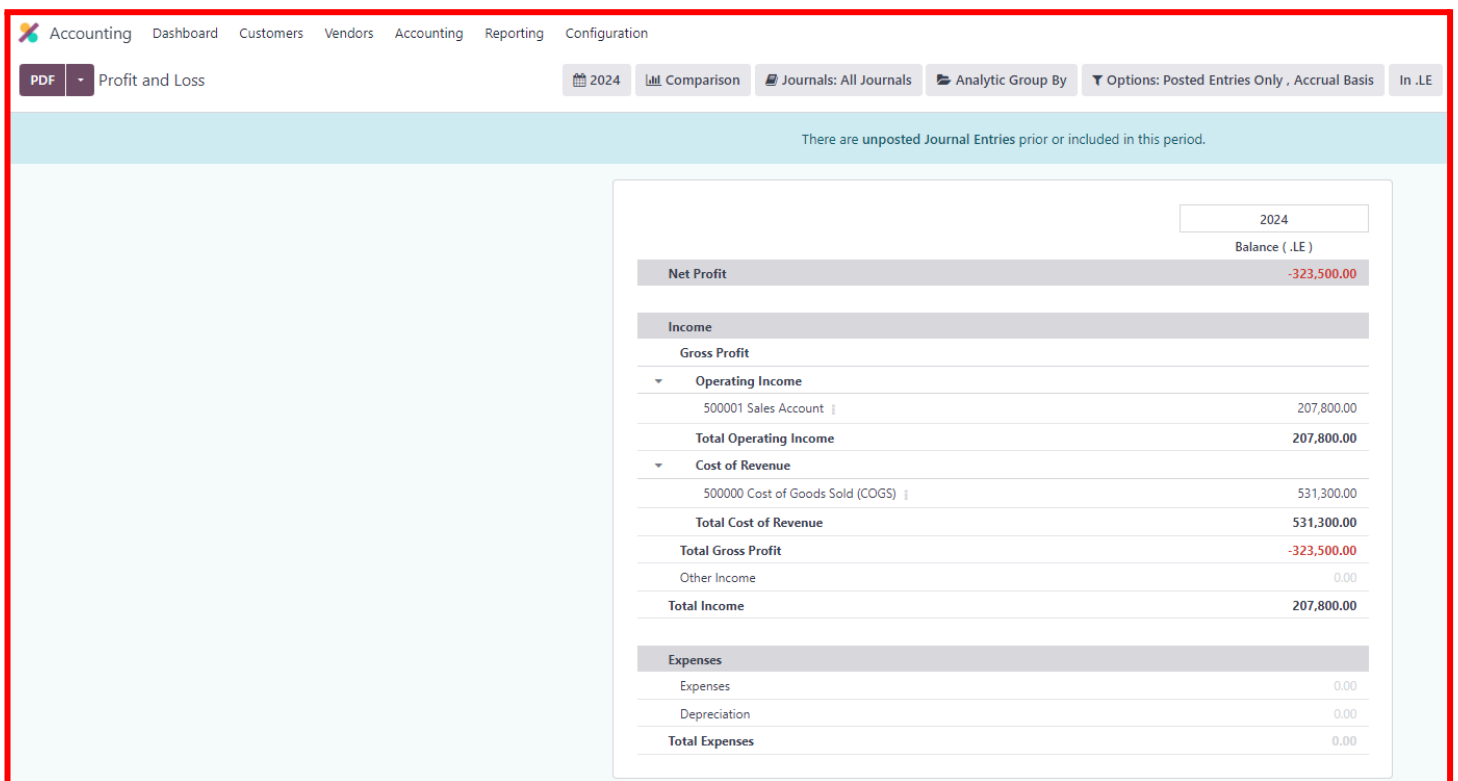- o Once the customer pays, register the payment against the invoice by clicking **Register Payment**.

3. **Viewing Financial Reports:**
   - Access key financial reports such as the **Profit & Loss statement** or **Balance Sheet** by clicking on the **Reports** tab.

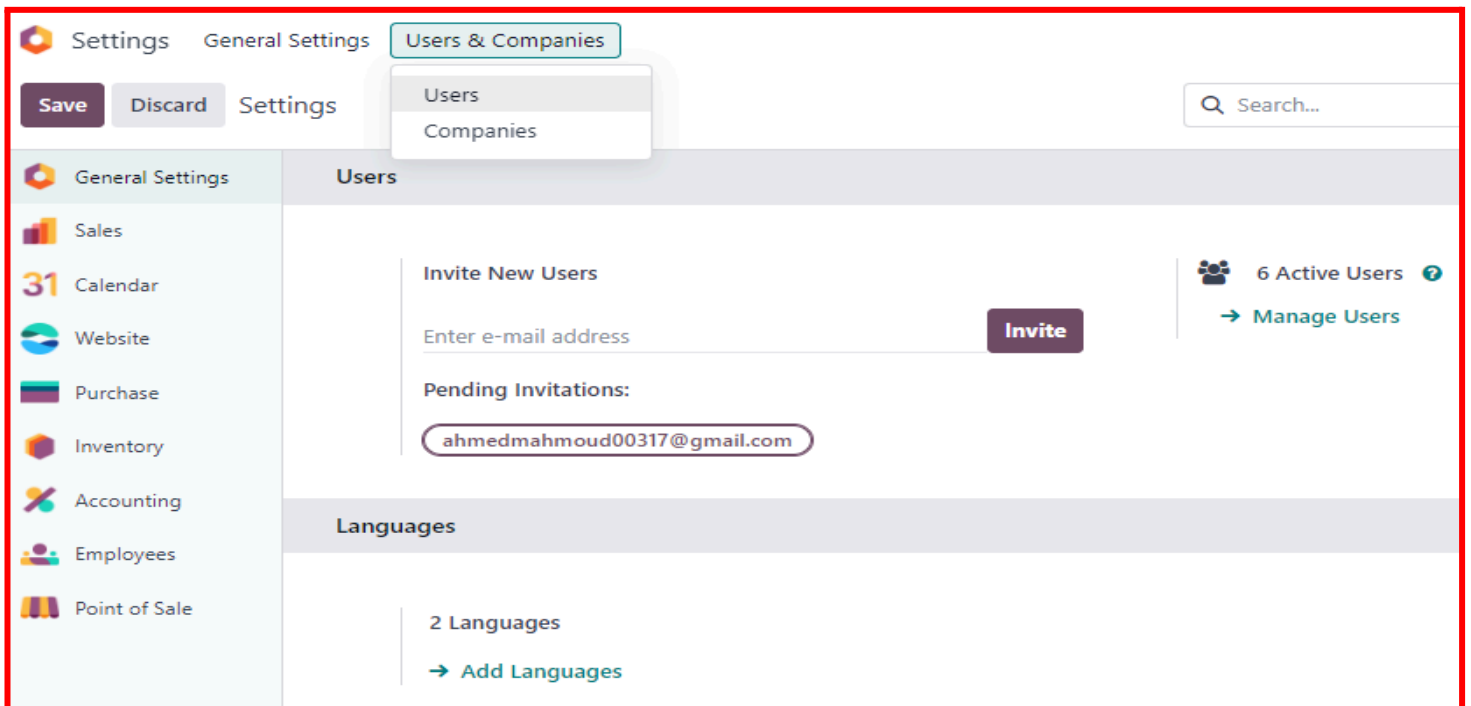# 6. User Roles and Permissions

6.1 Assigning User Roles

1. **Navigate to Settings:**
   ○ Go to **Settings** from the main menu.
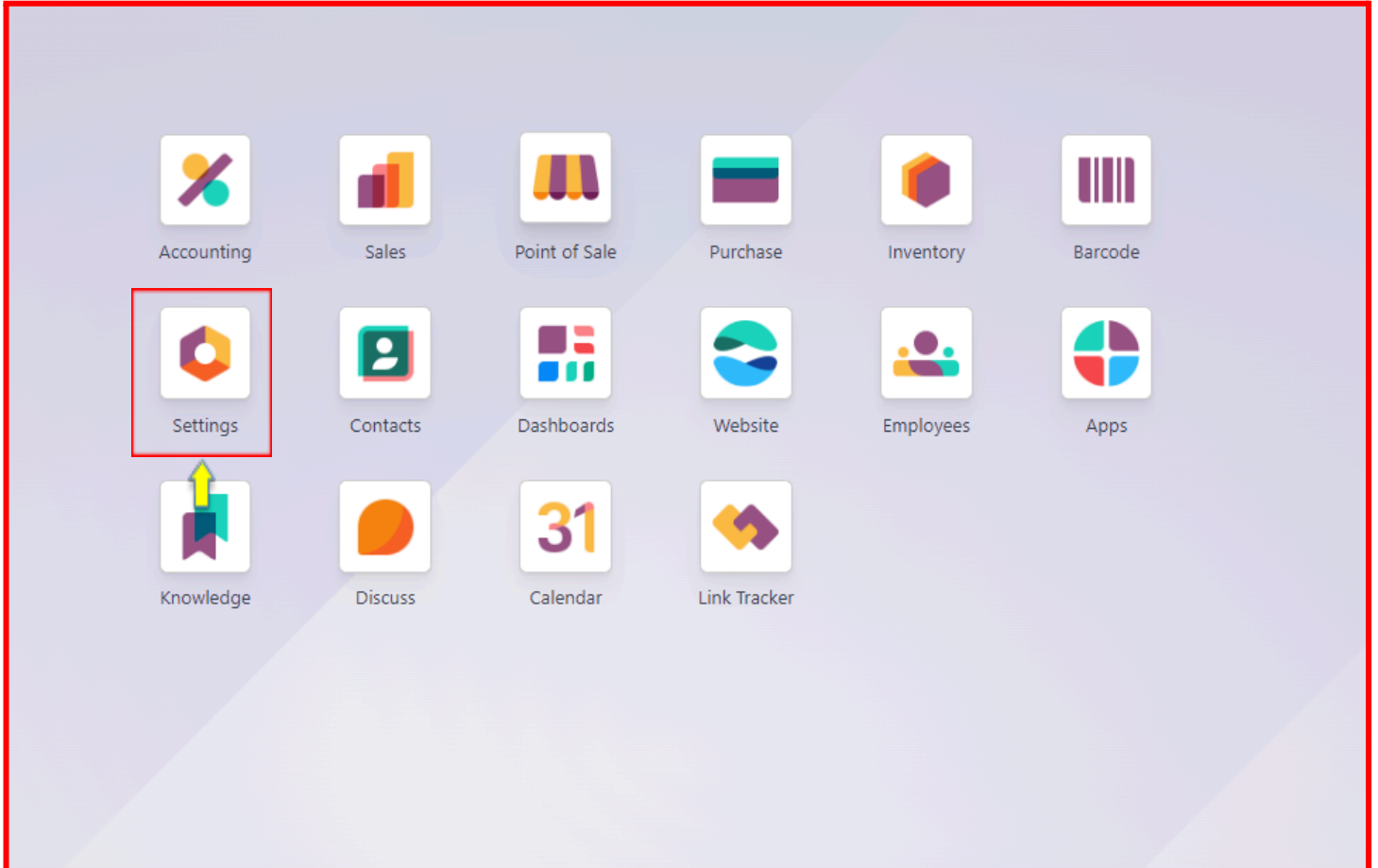
2. **Assign User Roles:**
   ○ Assign roles like **Sales Manager, Accountant, Inventory Specialist**, etc., to different users based on their department.

Select the needed module access

7. System Help and Support

If you encounter any issues while using Odoo, refer to the support section within the system or contact the IT department for assistance.

Open new support ticket: https://www.odoo.com/help
Email: help@odoo.com
Phone: +254 207 640 404