

## USER MANUAL



# Clever All In One Report Templates

**Version: 1.4**

**Compatibility:**

Odoo 8.x, 9.x, 10.x

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## Introduction

It is an exciting app for E-Commerce store owners to provide their customer product sorting on the basis of product tags. By adding Product tag support in the store admin can specify the product tags in which they want to segment products. Customers can opt for any tag provided by admin and see products added in them.

## Benefits of Clever All In One Report Templates

- It is an excellent app to manage multiple reports of Odoo store creatively. This app will help to maintain reports in a superior way. Admin can set layout of the reports in multiple ways.
- There are inbuilt 6 types of report configurations for the references. Admin can change them the way it is required.
- Admin can view Payment History in the invoice to keep a check of order details.
- Admin can set Text Colors, Company Details Colors and also can add product description in the Invoice. Admin can choose diverse colors with Color Picker.
- Admin will be able to manage templates of Invoices, Sales Orders, Purchase Orders and Request for Quotation, Delivery Notes and Item Pick up Notes.

## Pre-requisites

Following points must be followed before starting the Plugin installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Clever All In One Report Templates.
- An e-commerce module should be present in your instance to use this app.

# Installation

## Installation Steps

**Step 1: Download and extract the zip file.**

**Step 2: Check your Odoo add-ons path.**

- It should be same as defined in Odoo Config file.
- Config files are mostly saved in /etc folder. For e.g. /etc/odoo.conf
- Open Config file:
  - Give the command: `sudo/etc/odoo.conf`
  - Config file content: `addons_path = /opt/odoo/addons`

**Step 3: Open Terminal and go to download location**

- For e.g. if the download location path is: /home/odoo/Downloads then the command to be written in the terminal would be: `cd/home/odoo/Downloads`

**Step 4: Copy download modules to addons path**

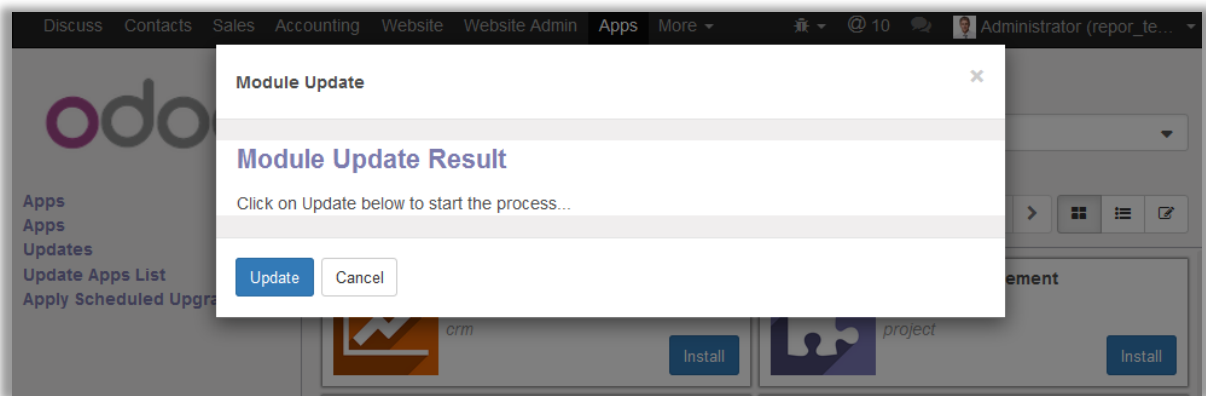
- Give the below mentioned commands to perform copy operation:
  - `$cd /home/odoo/Downloads/general_template`
  - `$cd v8`
  - `$sudocp general_template/opt/odoo/addons`

**Step 5: Restart Odoo server**

**Step 6: Login with the admin credentials in your odoo instance.**

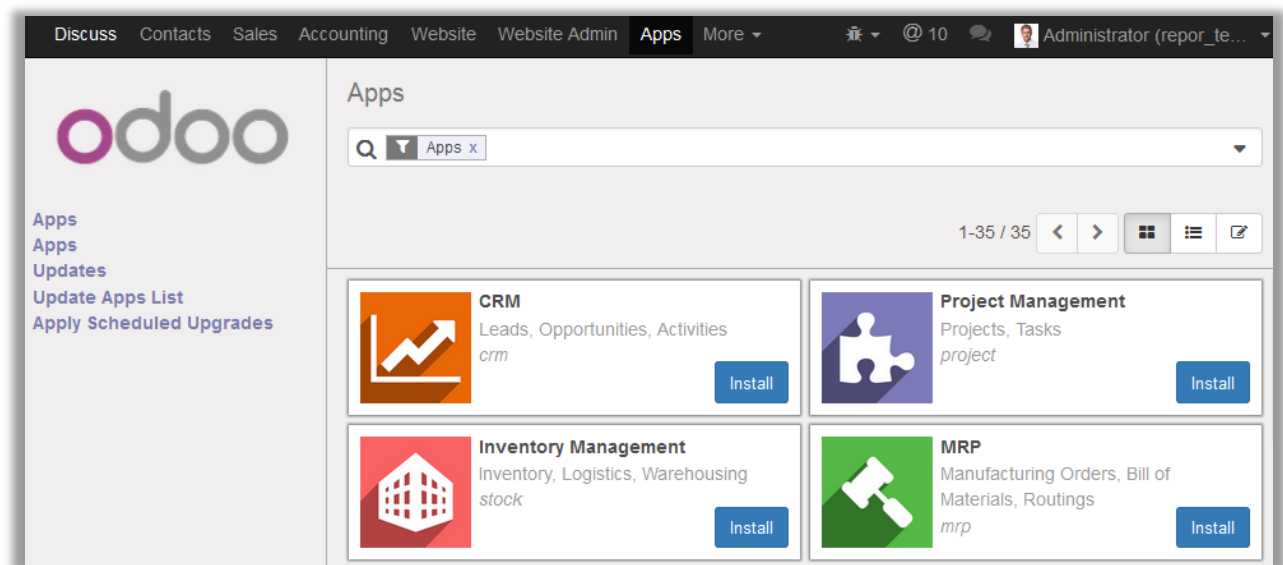
**Step 7: Go to Apps/Update Apps List.**

- Click on “Update” button.

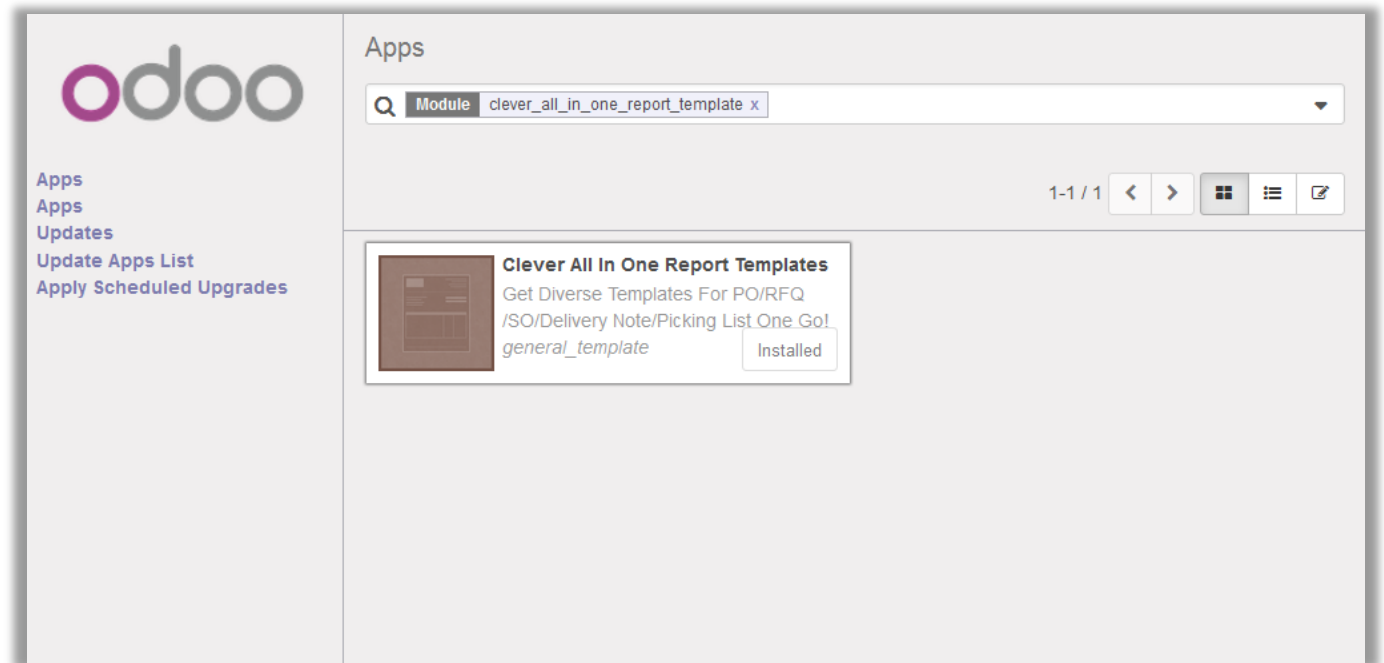


### Step 8: Go to Apps

- Remove search filter



- Enter module name in the search box provided in the top right corner of the page. For e.g. here write “clever\_all\_in\_one\_report\_template”.
- Click on install button.



# Plugin Configuration

## Step 1: Configuring Report Template

- Go to Settings -> Companies.
- Select Your Company and click on Report Configurations. Click on Edit to Edit the Template.

## Step 2: Set the Custom Footer

- To set Custom Footer Enable Custom Footer.
- Add the required Footer in Report FooterBox.
- Select the Paper Format as required.

### Configuration

|               |   |
|---------------|---|
| Custom Footer | <input checked="" type="checkbox"/>   |
| Report Footer | <div>Phone: +1 555 123 8069   Email: info@yourcompany.example.com  <br/>Website: http://www.example.com</div> |
| Paper format  | <div>US Letter</div>  |

### Step 3: Set Default Report Settings

#### Default Report Settings

Preview Template

Report Logo

Standard Template Configuration

Template Base Color


Template Text Color

General Text Color

Company Name Color

Company Address Color

Display Company Name in Bold



Contemporary

#A24689

#FFFFFF

#000000

#4D4D4F

#4D4D4F

☐

Report Watermark Logo

Table Odd Parity Color

Table Even Parity Color


Customer Name Color

Customer Address Color

Display Product Description

Display Customer Name in Bold

Display Product Image



#FFFFFF

#E6E8ED

#000000

#000000

☒

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☐

- **Template Preview:** Template preview will be shown on the basis of chosen Standard Template.
- **Report Logo:** Set the Report Logo for the Invoice.
- **Default Invoice Template:** Set the Invoice Template from following 6 Options.
  - Contemporary
  - Elegant
  - Creative
  - Professional
  - Advanced
  - Exclusive
- **Template Base Color:** Set the Template Base Color for the Invoice.
- **Template Text Color:** Set the Template Text Color for the Invoice.
- **General Text Color:** Set the General Text Color for the Invoice.
- **Company Address Color:** Set the Company Address Color for the Invoice.
- **Report Watermark Logo:** Set Watermark for the Invoices.

- **Table Odd Parity Color:** Set Table Odd Parity Color for the Invoices.
- **Table Even Parity Color:** Set Table Even Parity Color for the Invoices.
- **Customer Name Color:** Set the Customer Name Color for the Invoice.
- **Customer Address Color:** Set the Customer Address Color for the Invoice.
- **Display Product Description:** Enable Display Product Description to display product description on invoice.
- **Display Customer Name in Bold:** Enable Display Customer Name in Bold to display Customer Name in Bold.
- **Display Company Name in Bold:** Enable Display Company Name in Bold to display Company Name in Bold.
- **Display Product Image:** Enable to display the product image in the reports.
- Admin can choose any color for the editable text fields with the color picker

**Default Report Settings**

Preview Template

**Report Logo**

Biztech

Standard Template Configuration: Contemporary

Template Base Color: #A24689

Template Text Color: #FFFFFF

General Text Color: [Color Picker]

Company Name Color: [Color Bar]

Company Address Color: [Color Bar]

Display Company Name in Bold: ☐

**Report Watermark Logo**

Table Odd Parity Color: #FFFFFF

Table Even Parity Color: #E6E8ED

Customer Name Color: #000000

Customer Address Color: #000000

Display Product Description: ☒

Display Customer Name in Bold: ☐


Display Product Image: ☐

**NOTE: Watermark feature is not provided for Odoo v8.0**




### Step 4: Setting different Template for Customer


- Go to **Sales -> Customers**.
- Select the Customer you want to set Template for and click on **Report Configurations**. Click on **Edit to Set the Template**.
- Click on **Report Configurations** and choose from multiple templates to set for specific customer.




**ASUSTeK**

Not Archived

 1 Vendor Bills.

 2 Purchases

 2 Analytic Acc...

Address

31 Hong Kong street  
Taipei 106  
Taiwan

Phone

(+886) (02) 4162 2023

Mobile

Fax

Website

<http://www.asustek.com>

Email

[asusteK@yourcompany.example.com](mailto:asusteK@yourcompany.example.com)

Language

Tags

Distributor

Office Supplies

Contacts & Addresses

Internal Notes

Sales & Purchases

Accounting

Report Configuration

### Default Report Settings

|                        |              |                         |              |
|------------------------|--------------|-------------------------|--------------|
| Invoice Template       | Contemporary | Purchase Order Template | Professional |
| Sale Order Template    | Creative     | RFQ Template            | Advanced     |
| Delivery Note Template | Exclusive    | Picking List Template   | Elegant      |

### Step 5: Setting Currency for the Report

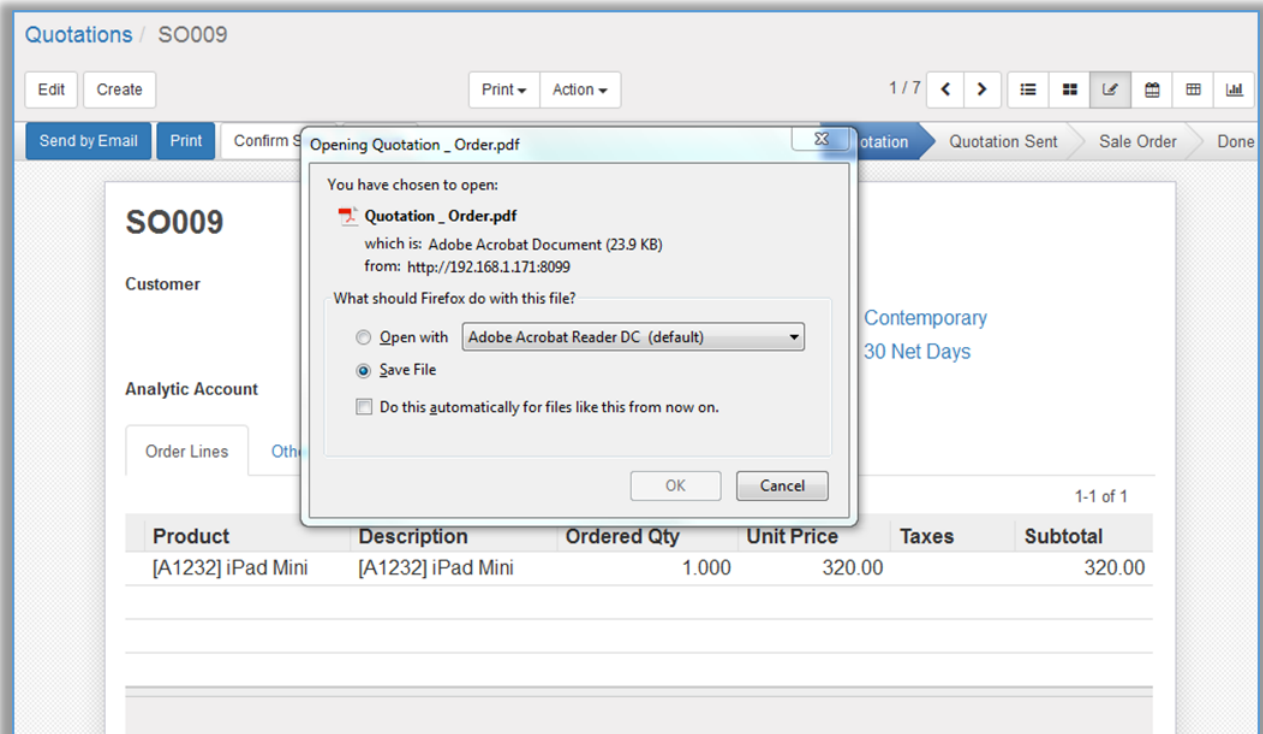
- Go to **Sales -> Customers**.
- Select the Customer for which you want to set specific currency language for and click on **Report Configurations**. Click on **Edit to Set the Template**.
- Click on **Report Configurations** and choose from multiple templates to set for specific customer.

The screenshot shows a customer profile for 'Agrolait'. At the top, there's a header with the company logo, a toggle for 'Individual' and 'Company' (with 'Company' selected), and a status bar showing 'Active', '\$1,175.00 Invoiced', and '\$ 2 Sales'. The main form is divided into two columns. The left column contains fields for 'Address' (69 rue de Namur, Street 2..., Wavre, State, 1300, Belgium), 'Website' (http://www.agrolait.com), and 'Tags' (Components Buyer, Partner / IT Services, Tags...). The right column contains fields for 'Phone' (+32 10 588 558), 'Mobile', 'Fax', 'Email' (agrolait@yourcompany.example.com), and 'Language' (English, with a dropdown menu showing Arabic / العربية, English, French / Français, and German / Deutsch). The 'Language' dropdown is currently open, highlighting 'German / Deutsch'.

### Step 6: Printing the Reports

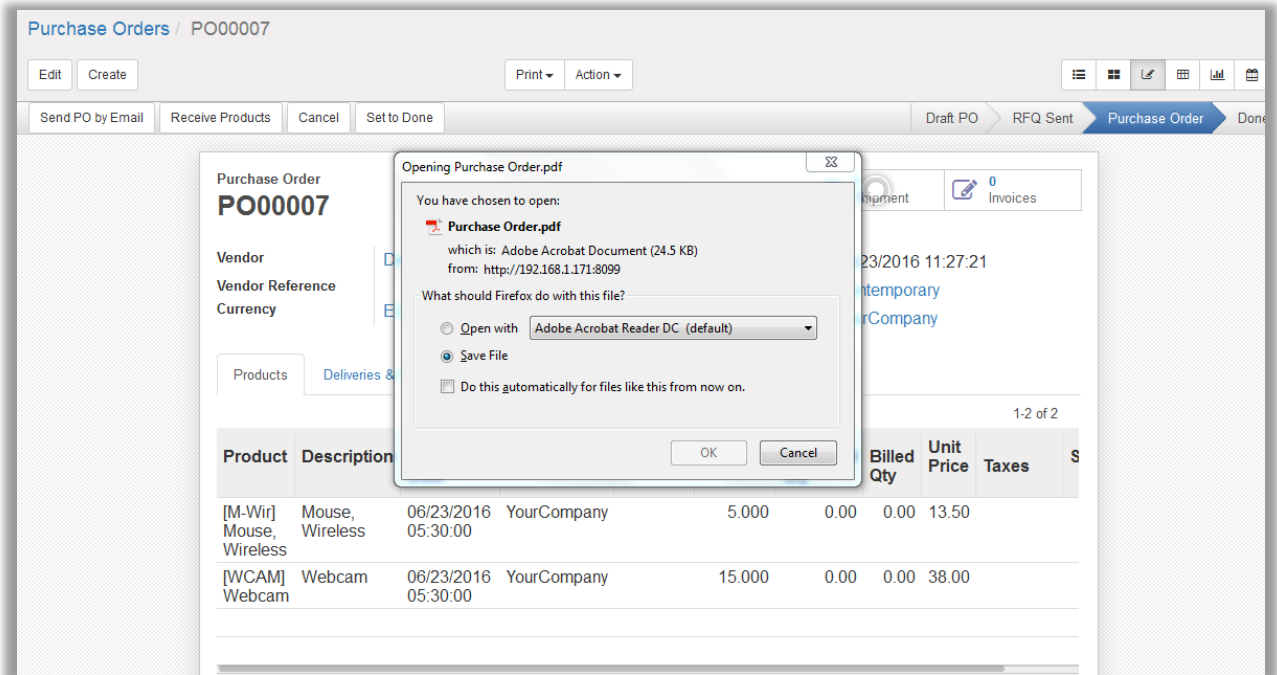
#### Printing Quotations / Sales Orders

- Go to **Sales -> Quotations**.
- Select any Quotation that you need to print.
- Click on Print to print the Quotation / Sales Orders.



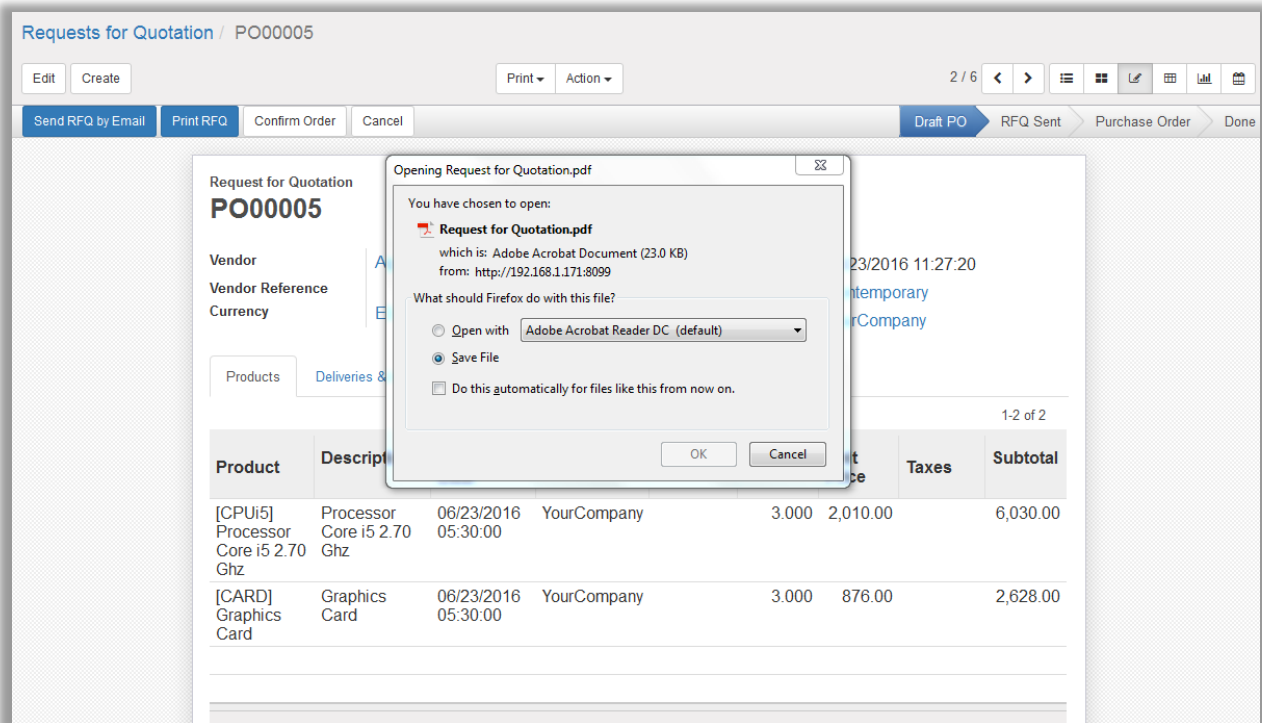
### Printing the Purchase Orders

- Go to **Purchases -> Purchase Orders**.
- Select any Purchase Order that you need to print.
- Click on **Print -> Purchase Order** to print the Purchase Order.



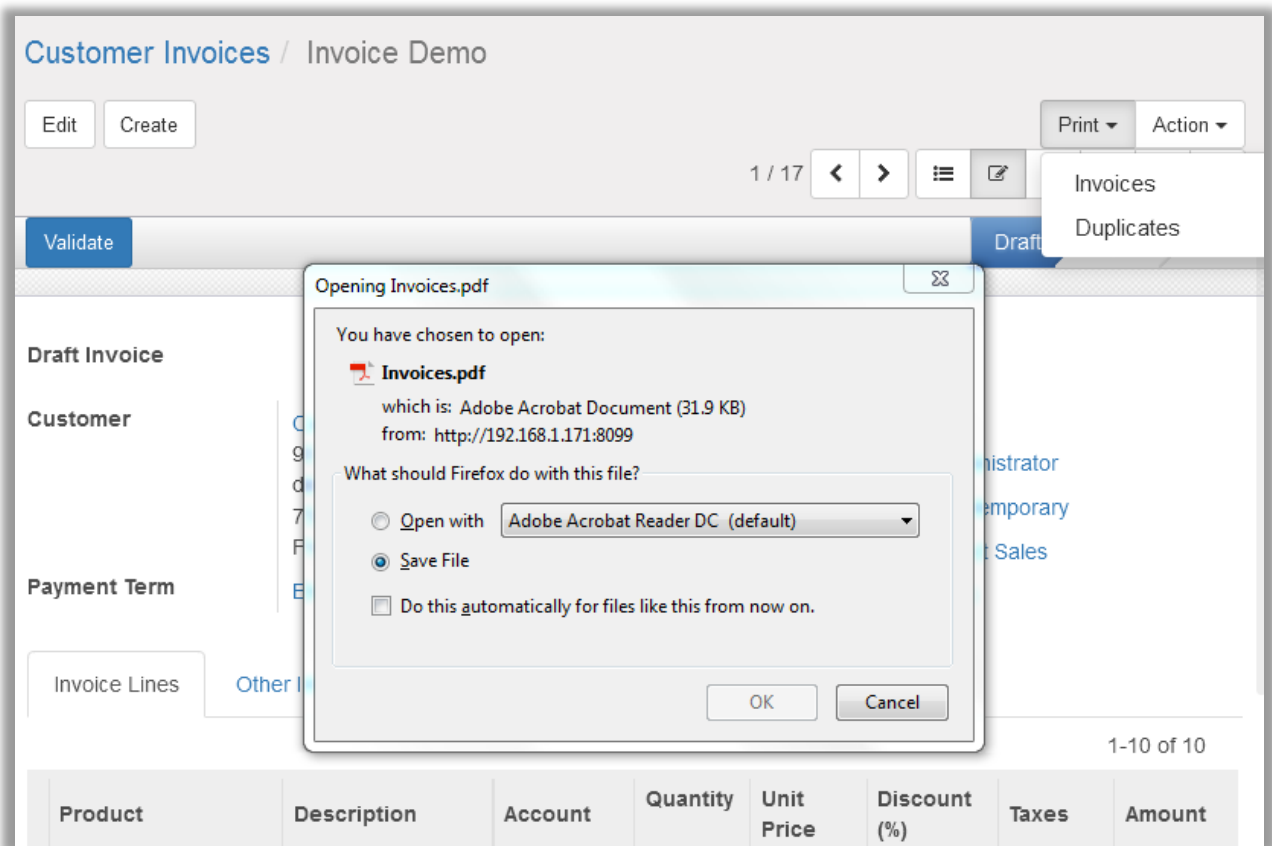
## Printing the Request For Quotation

- Go to **Purchases -> Request For Quotation**.
- Select any Quotation that you need to print.
- Click on **Print -> Request for Quotation** to print the invoice.



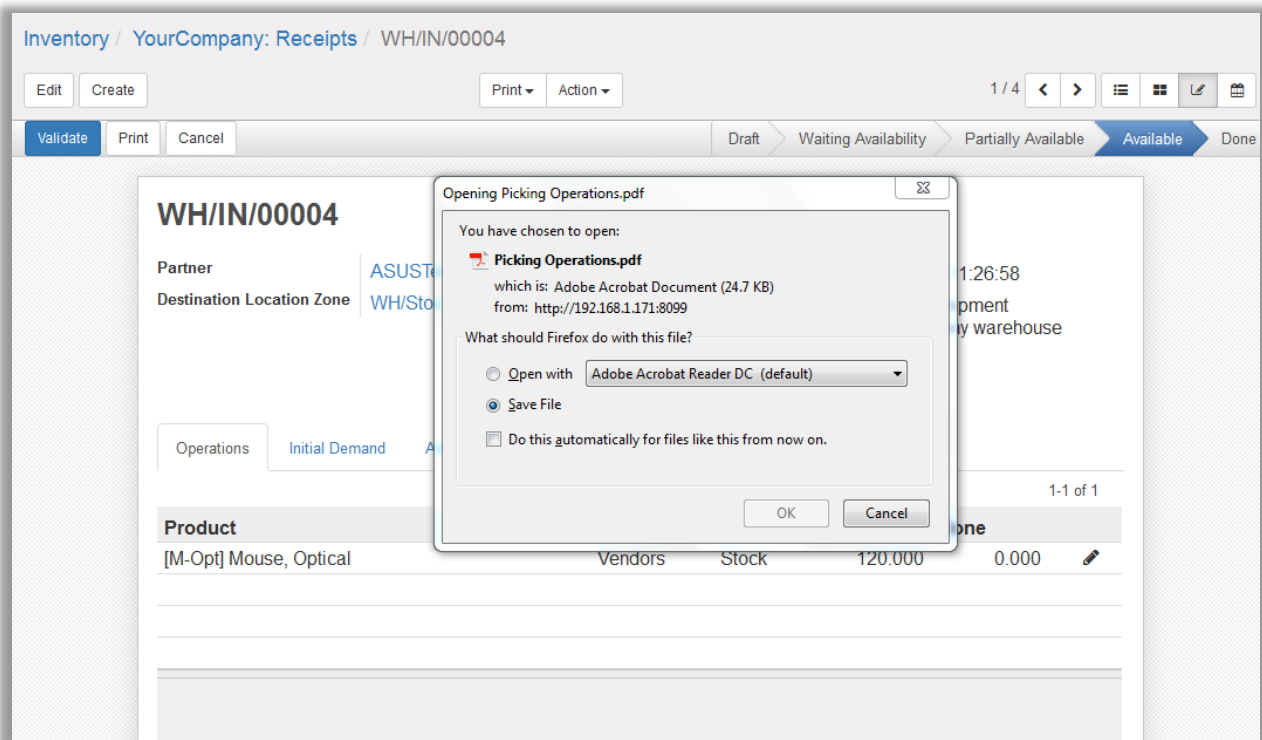
### Printing the Invoice

- Go to **Accounting -> Customer Invoices**.
- Select any Invoice that you need to print.
- Click on Print / Duplicate to print the invoice.

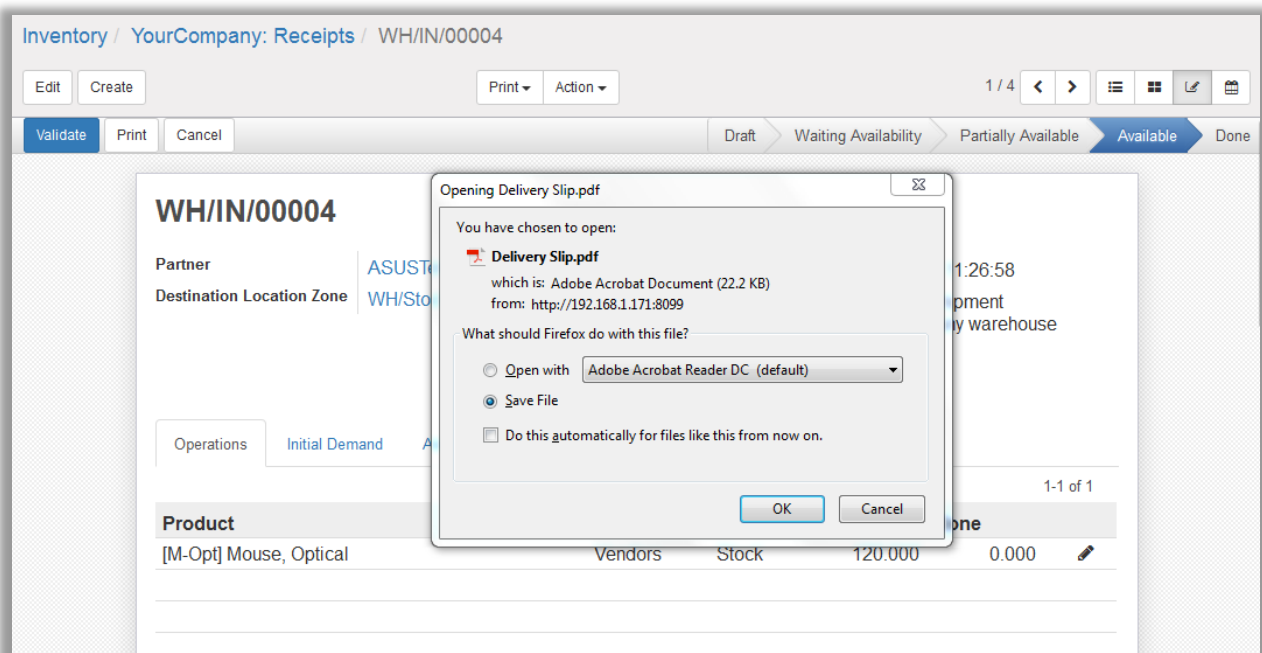


### Printing the Delivery Notes / Picking List

- Go to **Inventory -> Receipts / Internal Transfers / Delivery Orders** of any Company.
- Select any order that you need to print.
- Click on **Print -> Picking Operations** to print Picking List.



- Click on **Print -> Delivery Slip** to print Picking List



## Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-multiple-invoice-template.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to my account [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions. Our team will work to respond to your query prompt.

### Customization:

If you would like to customize or discuss about additional features for Dynamics CRM Inventory Manager, please write to [sales@appjetty.com](mailto:sales@appjetty.com)