Sales Module

1. Sales Overview and View in sales module
2. Sales Configuration settings
   - Enabling features:
   - **Product Catalog** [Variants- Variant grid entry- Product configurator- Unit of Measure- Deliver Content by Email- Product Packagings]
   - **Pricing** [Discounts- Coupons & Promotions- Customer Account- Margins- Pricelists]
   - **Quotations & Orders** [Online Signature- Online Payment- Confirmation Email- Quotation Templates- Quotation Builder- Customer Addresses- Default Quotation Validity- Sale Warnings- Lock Confirmed Sales- Pro-Forma Invoice]
   - **Shipping** [Delivery Methods- Incoterms- FedEx Connector- bpost Connector- UPS Connector- DHL USA Connector- USPS Connector- Easypost Connector]
   - **Invoicing** [Invoicing Policy- Down Payments] - Automatic invoicing
   - **Connectors** [Amazon Sync, eBay]

3. Sale order: Quotation- Send by email- Sales order - Reseller- Invoice - Margin - applying [Pricelist, quotation template- Promotion & Coupons- Incoterms - Rounding - Fiscal Position- Shipping policy- warehouse- Payment terms- Referrer-shipping charge- coupons -Promotions- Discounts- Tags] - Scheduling Activity- Send message- Log Note-Lock Orders for confirmed Sales -Order Status- Lead Time- Expected Delivery date- Customer Invoice- Invoice status- Register Payment- Down payments- Automatic invoicing
4. Importing Sale orders
5. Sales Return - Credit note
6. Shipping policy: Types: As soon as possible -When all products are ready
7. Invoicing Policy: Types - Ordered Quantities - Delivered Quantities - Invoice creation - proforma invoice- Customer taxes
8. Sales Teams: Create Sales team- adding Team leader- Sales Person- Invoicing target- Adding salesperson & team to order - Sales team analysis
9. Customer: Creation - Importing- Multiple addresses - each field, tabs and smart tab of customer form
10. Order to Invoice - Order to Upsell

11. Product creation and Importing
    Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging-Lead Time- Product Income & Expense Accounts
12. Product variants creation and importing
    Attributes creation - variants creation mode - Variant pricing - Variant importing
13. Price list: Use of pricelist- Types of pricelist - Multiple prices per product - Advanced price rules (discounts, formulas)- Apply on product/Variant/categories- Price computation based on fixed price, percentage or formula (computing on sales price/cost price/pricelist)- Use of Rounding Method, Minimum Margin, Maximum Margin, Surcharge
14. Coupons & Promotions: Use- Coupon programs- Promotion programs- Applying on Based on Customers, Products order [Applying Conditions- Validity- Setting Rewards], Applying discounts & Rewards
15. Quotation templates: Use- Creation - Quotation Builder - Validity - Terms and conditions
16. Unit of measure: Unit of measure - UoM Category and assigned to the product, How multi UoM apply on SO & PO- Group Products in POS
17. Use and difference between product configurator and Variant Grid entry
18. Use of 'Deliver Content by Email'
19. Discounts apply on sale order- Down payments
20. Managing Customer account [On Invitation- Free sign Up] - Portal access to Partners- Data available in customer portal
21. Sales Margins in amount and percentage
22. Terms and conditions: Default- Quotation template
23. Online payment & Signature for the customer invoice
24. Adding delivery address and invoice address on order
25. Setting default Quotation Validity
26. Setting Sales warnings and blockings to product and customers
27. Inco-terms-Tags- Activity Types
28. Shipping connectors: FedEx Connector- bpost Connector- UPS Connector- DHL USA Connector- USPS Connector- Easypost Connector - Shipping Methods - Shipping Cost Calculation [Based on fixed price- Based on Rules- Free shipping limit- Restricting shipping to country groups]
29. Connectors Amazon sync and ebay
30. Sales Report: Dashboard - Sales - Different view and report- PDF & XLSX format- Pivot view- Filter- Group By- Comparison- Favourites- Insert in spreadsheet

a. Sales report of current month including Quantity ordered,Quantity delivered,Quantity Invoiced,Quantity To Invoice, Untaxed total,total
b. Sales report of current month with margin
c. Sales achieved by each Salesperson & Sales Team

31. Sales Access Rights: User Documents only, Own documents only, Administrator
32. Types of Users: Internal User, Portal User, Public user

Purchase Module

1. Purchase Overview -Dashboard- values- Order status- different views
2. Purchase Configuration settings - Enabling features:
    - **Orders** [Purchase Order Approval- Lock Confirmed Orders- Purchase Agreements- Warnings- Receipt Reminder]
    - **Invoicing** [Bill Control- 3-way matching: purchases, receptions and bills]
    - **Products** [Variants- Variant Grid Entry- Product Packaging]
    - **Logistics** [Dropshipping]
3. Purchase order: Creation- Request for Quotation- Send by Email- Vendor Confirmation- Purchase Order- Products- Other Information- Warehouse- Fiscal position- Payment Terms- Lock Confirmed Orders- Receipt- Bill- Bill status
4. Importing Purchase orders
5. Purchase return- Debit Note - Scrap
6. Vendor: Creation - Importing- Multiple addresses - each field, tabs and smart tab of vendor form
7. Purchase Agreement: Types- Call for tender- Blanket Order- Configurations
8. Product creation and Importing
   Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging-Lead Time
9. Product variants creation and importing
   Attributes creation - variants creation mode -eCommerce Filter Visibility- Variant pricing - Variant importing
10. Vendor Pricelist - Delivery lead time- Vendor pricelist priority
11. Product Attributes: creation - variants creation mode

12. Product categories: Parent category- Removal Strategy- Routes- Reserve Packagings- Costing method- Inventory valuation- Account Properties- Stock Account properties- Need for each account and when they get affected
13. Purchase order Approval
14. Warnings in orders for products or vendors
15. Lock Confirmed Orders
16. Receipt Remainder - vendor confirmation- On-time Delivery Rate
17. Bill Control Policies: Types - Ordered quantities- Received quantities- Vendor Taxes
18. 3-way matching: purchases, receptions and bills [conditions: Yes, No, Exception]
19. Variant Grid Entry
20. Dropshipping
21. Purchase Reports: Dashboard- Purchase report- Different view and report- PDF & XLSX format- Pivot view- Filter- Group By- Comparison- Favourites- Insert in spreadsheet
    a. Purchase report of current month including ordered quantity, received quantity, quantity billed, to be billed, untaxed total, total
    b. Purchase report based on warehouse
    c. Purchase report based on the purchase created by each purchase representative and its status
22. Purchase Module Access rights

Inventory Module

1. Inventory Overview
2. Inventory Configuration settings - Enabling features:
    - **Operations** [Packages- Batch Transfer - Wave Transfer- Picking Policy- Warnings- Reservation- Quality & Quality worksheet- Reception report- Show Reception Report at Validation- Annual Inventory Day and Month]
    - **Barcode** [Barcode Scanner- Nomenclature -Configure product barcode- Print barcode commands & demosheets]
    - **Shipping** [Email Confirmation- SMS Confirmation - Signature- Delivery Methods]
    - **Shipping Connectors** [FedEx Connector- bpost Connector- UPS Connector- DHL USA Connector- USPS Connector- Easypost Connector]

- **Products** [Variants- Units of Measure- Product Packagings]
- **Traceability** [Lots & Serial Numbers - Expiration Dates- Display Lots & Serial Numbers on Delivery Slips- Display Expiration Dates on Delivery Slips- Consignment]
- **Valuation** [Landed Costs- Display Lots & Serial Numbers on Invoices-Default Journal]
- **Warehouse** [Storage Locations- Multi-Step Routes- Storage Categories]
- **Advanced Scheduling** [Security Lead Time for Sales- Security Lead Time for Purchase- Days to Purchase]

1. Warehouse management: Creation - configuration- Storage locations & Multi-step routes- Multiwarehouses- Incoming shipments- Outgoing shipments- Resupply rules
2. Cross Docking
3. Locations: Creation- Types of locations- View- Internal locations- Customer locations- Vendor location- Inventory loss- Production- Transit Location- Removal strategy[FIFO- LIFO- FEFO]- Putaway Rules- Current Stock- Cyclic inventories [Inventory frequency- Last effective inventory-Next expected Inventory]
4. Routes: Default routes[Buy- Manufacture- Replenish on Order MTO- Dropship- Crossdock-resupply routes]- Custom Route Creation- Rules for routes[Pull Rule, Push rule, pull & Push]- Routes application on product categories, Products, packagings, warehouse & sales order.
5. Rules: Pull From- Push To- Pull & Push- Buy -Manufacture- Each and every field in the form.
6. Operations Types: Receipts-Delivery orders-Internal transfers-Manufacturing-PoS Orders- Creation- use of each fields in creation form- Configuration
7. Storage Categories- Storage Category Capacity
8. Putaway Rules: Creation and application
9. Product categories: Parent category- Removal Strategy[FIFO- LIFO- FEFO]- Routes- Costing methods[Standard- AVCO- FIFO]- Inventory valuations [Manual-Automated]- Account Properties- Stock Account properties- Reserve Packagings [Reserve Only Full Packagings- Reserve Partial Packagings]
10. Attributes creation - variants creation mode- eCommerce Filter Visibility
11. Product Packaging- Apply on both sale & purchase
12. Packages - Disposable and reusable- Package Types

13. Reordering Rules: Apply on products and warehouses- replenishment calculation- Replenishment information [forecast description]
14. Barcode Nomenclature- Regular expressions
15. Unit of measure: Unit of measure - UoM Category- Multi UoM to the product.
16. Shipping Methods : Shipping cost based on Provider, Fixed price, based on rules- Free Shipping
17. Packages Types
18. Transfers: Internal transfers- Receipts- Delivery orders- Pick- Pack- Inter company transfer- Intra company transfer
19. Batch transfer: Batch picking- Picking Policy - Wave transfer
20. Replenishment & Reordering Rules- Replenish quantity calculation
21. Inventory Adjustment: Locations- Products- Include Exhausted Products- Counted quantities- Accounting Date- Opening Stock- Negative quantity
22. Scrap Management: Scrap orders- Scrap Locations
23. Landed costs: landed cost product- Split method- effect on inventory-on transfer - On MO
24. Run Scheduler
25. Product creation and Importing

    Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging-Lead Time
26. Product variants creation and importing

    Attributes creation - variants creation mode - Variant pricing - Variant importing
27. Lot & Serial Number: Expiration- Product expiry & Alert
28. Reservation: Immediately after sales order confirmation- Manually or based on automatic scheduler
29. Email confirmation- SMS confirmation on delivery order- Signature
30. Consignment
31. Lead time & security lead time: customer lead time- Delivery Lead time- Manufacturing Lead Time- Security Lead Time for Sales- Security Lead Time for Purchase- Days to Purchase
32. Reporting : Warehouse Analysis - Inventory Report- Forecast Inventory- Inventory Valuation- Stock Moves- Product Moves- Different Views- Filter- Group by- Comparison- Insert in Spreadsheet
    a. Warehouse Analysis- Cohort view

b. Stock report of the start of the current Month
c. Today’s stock report at each location
d. Current stock details of Location WH/Stock
e. Report of expired products
f. Report of all done deliveries of current month [Includes each OUT transfers, products and count]

33. Module Access rights

Accounting Module

1. Accounting overview: Initial setup [First bill- Bank accounts- Accounting Period- Chart Of Accounts]- Journals- Adding Opening Balance
2. Configuration settings:
   - **Fiscal Localization**
   - **Taxes** [Default Taxes- Tax Return Periodicity- Rounding Method- TaxCloud-TaxCloud Categories- EU Digital Goods VAT- Cash Basis]
   - **Currencies** [Main Currency -Multi-Currencies- Post Exchange difference entries in- Automatic Currency Rates]
   - **Customer Invoices** [Default Sending Options- Snail Mail- Default Terms & Conditions- Line Subtotals Tax Display- Warnings- Cash Rounding- Default Incoterm- Intrastat- Sale Receipt]
   - **Customer Payments** [Invoice Online Payment- Batch Payments- SEPA Direct Debit (SDD)- QR Codes]
   - **Vendor Bills** [Bill Digitalization- OCR Single Invoice Line Per Tax- Purchase Receipt- Predict vendor bill accounts]
   - **Vendor Payments** [Checks- SEPA Credit Transfer (SCT)]
   - **Bank & Cash** [Inter-Banks Transfers- Automatic Import- CSV Import-OFX Import- QIF Import- CAMT Import- Anglo-Saxon Accounting]
   - **Fiscal Periods** [Fiscal Year- Fiscal Years- Invoicing Switch Threshold]
   - **Analytics** [Analytic Accounting- Analytic Tags- Budget Management- Margin Analysis]
   - **Reporting** [Add totals below sections]
3. Customers :

4. Customer Invoice- Creation- Invoice status- Journal entries -Ledger Posting- Invoice Re-Sequencing- Credit Notes- Creation - Resequencing- Each and every fields- Journal entries -Ledger Posting- Rounding [Up/Down/Half Up]- Fiscal Position
5. Customer Receipts- Customer Payments- Payment methods[Manual/Electronic/check] -Printing Check -Payment matching - Reconciliation- Batch payments
6. Follow up- Reports - Follow Up-Levels- Setting Activities based on Due date
7. Direct debit mandates - SEPA Direct Debit (SDD)
8. Product: creation and Importing- Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging-Lead Time
9. Customer: Creation - Importing- Multiple addresses - each field, tabs and smart tab of customer form

1. Vendors:
    - Bill - Creation- Debit Notes- Bill status- Journal entries -Ledger Posting- Refunds- Creation Each and every fields- Journal entries -Ledger Posting
    - Vendor Receipts - Vendor Payments- Payment methods- Payment matching - Reconciliation- Batch payments
    - Product: creation and Importing- Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging-Lead Time
    - Vendor: Creation - Importing- Multiple addresses - each field, tabs and smart tab of customer form
2. Employee expense management
3. Accounting:
    - Miscellaneous: Journal entries- Journal Items- Journals [sale- purchase-bank and cash-Miscellaneous]-Payment configuration in cash and Bank Journals- Ledgers [Partner ledger- General Ledger]
    - Automatic Transfer
    - Reconciliation- Payment Matching- Bank statement creation/importing- Bank reconciliation
    - Lock dates: Lock Date for Non-Advisers- Lock Date for All Users- Tax Lock Date- Tax Adjustments- Fiscal year closing
    - Budget Management- Budgetary Position- budget calculation planned amount, practical amount, theoretical amount- Each and every fields - Budget computation- budget Analysis- Use of analytic account in budget management

- Asset management- Asset models- Depreciation Method [Straight Line- Declining- Declining then Straight Line]- Computation- Book value, Salvage value, residual value- each and every field- Existing Depreciation Schedule- Automating Assets- Post Automatically -To check- Depreciation Schedule- Ledger posting- Affecting reports
- Deferred Revenues- Deferred Revenue model- Depreciation Method- Existing Depreciation Schedule- Automate Deferred Revenue - Post Automatically -To check- Depreciation Schedule- Ledger posting- Affecting reports
- Deferred Expenses- Deferred Expense model- Depreciation Method- Existing Depreciation Schedule- Automate Deferred Expense - Post Automatically -To check- Depreciation Schedule- Ledger posting- Affecting reports
- Analytic Accounting: Use of analytic account- Creating Analytic Accounts- Analytic Account Groups- Analytic Defaults Rules- Analytic Items- Analytic Tags- Analytic Report
- Payment Terms- Payment terms application on SO/PO, Identifying due amount based on payment terms- Incoterms- Intrastat Code
- Add a bank Account- Creation- bank statements- Online synchronisation- Bank reconciliation
- Reconciliation Models- Manually create a write-off on clicked button- Suggest counterpart values- Match existing invoices/bills- each and every field- Setting counterpart for reconciliation
- Chart Of Accounts- Creation - Importing- Account Types- Nature- Account Groups- Account tags- taxes- Opening Balance update
- Tax - Scope - Tax configuration- Tax include in price- Tax included/ tax Excluded on orderline subtotal
- Cash Basis & Accrual basis- Tax report - Cash Basis Taxes
- Journals: Creation- Configuration- Journal entries - Payment Configuration- Advanced setting- each and every fields - Journal Groups
- Fiscal Position: Tax mapping- Account mapping- Detect automatically
- Currencies- Multi currency - Currency Rates- Auto update currency rate- Exchange differences- unrealised currency gain or loss- Decimal accuracy
- Decimal accuracy: Changing decimal accuracy for products price, Quantity
- Payment Acquirers- Payment Icons-Payment Transactions- Saved Payment Data

- Product categories: Parent category- Removal Strategy[FIFO- LIFO- FEFO]- Routes- Costing methods[Standard- AVCO- FIFO]- Inventory valuations [Manual-Automated]- Account Properties- Stock Account properties
- Cash Rounding [Up- Down- Half Up]- Rounding Method [Round per Line, Round Globally]
- Disallowed Expense- Disallowed Expenses Categories- Disallowed Expenses Report
- Module Access rights
- Reporting:
- Tax Report - Financial Report
- Profit and Loss- Balance Sheet- Executive Summary- Cash Flow Statement- Check Register
- Partner Report: Partner Ledger- Aged Receivable- Aged Payable
- Audit Reports: General Ledger- Trial Balance- Consolidated Journals- Tax Report- Intrastat Report- EC Sales List- Journals Audit
- Management: Invoice Analysis- Analytic Report- Unrealized Currency Gains/Losses- Depreciation Schedule-Budgets Analysis- Product Margins
- Multi company - All above reports

CRM Module

1. CRM Overview: Pipeline- View- Filter- Group by-Stages- Opportunities-My Pipeline
2. Configuration Setting- Enabling features:
    - **CRM** [Leads- Incoming Emails- Recurring Revenues- Predictive Lead Scoring- Multi teams- Rule-Based Assignment]
    - **Lead Generation** [Visits to Leads- Lead Enrichment- Lead Mining- Outlook CRM Extension]
    - **Partners Commissions** [Automatic PO frequency- Minimum PO amount total]
3. Lead Creation: What is lead - creation- Need for every fields in lead form- Won/Lost- Lost reason- lead source- Probability - Recurring Revenues- Similar Leads mergings- Converting to Opportunity- My Pipeline- Stages - tags- Activity Scheduling- Creating Quotation - My quotations- Sale order- Send message- Log Note - Restoring Lead/opportunity

4. Sales Team: Create Sales team- adding Team leader- Sales Person- Invoicing target- Adding salesperson & team to order - Sales team analysis- Team members
5. Rule-Based Assignment- Team assignment- Leads assignment
6. Customer: Creation - Importing- Multiple addresses - each field, tabs and smart tab of customer form
7. Activity Types: Creation- Model specific- User specific- Next Activity- Recommending Activity
8. Predictive Lead Scoring - Update Probability
9. Lead Generation:
    - Incoming emails- website- Live Chat- Discuss
    - Lead Enrichment -Enrich leads on demand only- Enrich all leads automatically
    - Visits to Leads- Visits to Leads- Lead Generation views
    - Lead Mining - Lead Mining Requests
    - Outlook CRM Extension
10. Reseller: Commission Plans- Partner Level- Partner Activations- Partnership Analysis
11. Odoo Spreadsheet: Reinsert pivot table- Reinsert pivot Cell- Conditional formatting- Applying Filters
12. Reporting : Dashboard- Forecast- Lead analysis- Pipeline Analysis- Pipeline activity analysis- Partnerships- Different view - cohort view - Filter- GroupBy- Comparison- Favourites
    a. Lost leads of each sales person
    b. Report of leads generated from campaigns and the expected revenue
    c. Count of opportunity generated by each salesperson on every month
13. Module Access rights

Point Of Sale

1. Overview of Point of Sale
2. Configuration setting: Enabling Features
   [Default Sales Tax - Pricelists- Multi-Currencies- Cash Rounding- Adyen-Vantiv (US & Canada- Ingenico (BENELUX)- Six- Inventory Management]
3. Point of Sale: Creation - Configuration [Shop - Restaurant]
    - **Shop:** [Authorized Employees- Manage Orders- Product Configurator- Category Pictures- Restrict Product Categories- Start Category- Large Scrollbars- Connected Devices: IoT Box- Direct Devices- Taxes: Fiscal Position per Order-

Fiscal Position- Default Pricelist- Product Prices- Advanced Pricelists- Global Discounts- Manual Discounts- Loyalty Program- Price Control- Payments:Payment Methods- Cash Rounding- Advanced Cash Control- Tips- Bills & Receipts: Header & Footer- Automatic Receipt Printing- Invoicing- Inventory: Operation Type- Accounting: Journal Entries- Sales Reporting: Sales Team]

- **Restaurant**: [Is a Bar/Restaurant- Authorized Employees- Floors & Tables- Notes- Manage Orders- Product Configurator- Category Pictures- Restrict Product Categories- Start Category- Large Scrollbars- Connected Devices: IoT Box- Direct Devices- Order Printer- Taxes: Fiscal Position per Order- Fiscal
- Advanced features in Odoo 15 Pos

Project

1. Project Overview: Projects, tasks, overview, planning, rating
2. Configuration Setting: Enabling features:
   - Collaborative Pads- Subtasks- Customer Ratings- Recurring Tasks- task dependencies- Project Stages- Planning- Timesheets- Profitability
3. Project: Creation -Project stages and tracking- project Visibility- Analytic Account - Timesheet management [Manual - Timesheet timer] - Types of Project [Billable- Fixed- No Task]- Adding products for Tasks- Worksheets management- Customer Ratings- Planning resources on project tasks- Extra Quotations- Collaborative Pads- Sub-tasks- Recurring Tasks]- project Invoicing [to Different customer- Unique Customer]- Pricing [Project Rate- Employee Rate]- service invoicing Policies [Fixed- Timesheet costs- Milestones]
4. Tasks & Sub-tasks: Overview- view- Filter & Group by- Creation-Different task views- Task Stages- Task Assignees and followers- Subtask creation- Blocked By and Gantt View- Collaborative Pads- Recurrent task- Field service- Products- Worksheets- Timesheet management- Employee cost- Tags- Activity Types- Quotation- sales orders- setting task & subtask visibility to assigned person only
5. Stages: Project stages- Task stages- sales team assignation- Email notification on stage change- Rating
6. Project Updates: Project updates- Burnt down charts- Milestones- Project cost and Revenue calculation- Project profitability- Smart tabs and other options

7. Reporting: Different views- Tasks Analysis- Timesheet and Planning Analysis- Customer Ratings- Project Costs and Revenues
8. Module Access rights

Manufacturing

1. Manufacturing Overview: Workcenter- Work order- Plan Orders
2. Configuration Settings: Enabling Features:
   - **Operations** [Work Orders -Subcontracting- Timer- Quality- Lock Quantities To ConsumeBy- Products]
   - **Planning** [Master Production Schedule- Security Lead Time]
3. Workcenter: Creation - Alternative workcenters- Production Information- Costing Information- Equipments- Iot triggers- Performance- OEE calculation- each and every fields-Smart tabs: Load -Lost- Performance- Operations- OEE
4. Operations: Creation- Assigned to workcenter- each and every fields
5. Bill of Materials: Creating BOM for products- Components- Cost Share- Operations - Copy Existing Operations- Setting QC points- By Products- Manufacturing readiness- Consumption Flexibility- BoM Types- Cost and Structure- Routing Performance- ECOs- multi BOMs- each and every fields- Smart tabs
6. BoM Types: [Manufacture- Kit- Subcontracting]
7. Product creation and Importing
8. Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Available in POS- PoS Product Category- Product variants
9. Lot & Serial Number: Expiration
1. Manufacturing: MO creation- MO Status- Setting priority to MO- Manufacturing Lead Time- Work orders and status- Run scheduler- By products managing- Stock movements

- Traceability- scraping- Adding components- Maintenance request passing- Quality Alerts- Cost Analysis- Analytic Accounting- Smart tabs

2. Unbilding orders
3. Planning: [Planning By Production- Planning By Work center-]
4. Master Production Schedule: Time Range- Number of Columns- Adding Product- Replenishing- Each and every fields- Rows- Indirect demand- safety stock- Color coding- Replenishment calculation]
5. Report: Manufacturing Orders- work orders- Overall Equipment Effectiveness- Production analysis- Different views -filter- group by
6. Module Access rights

Maintenance

1. Maintenance Overview: Maintenance teams- Requests - reporting
2. Maintenance team creation
3. Equipment: Equipment Category Creation -Machines & tools Creation- each and every field in equipments- MTBF -MTBR- Preventive Maintenance Frequency- Work center- Equipments in workcenter
4. Maintenance Requests: Request creation - Maintenance Stages- Activity Types- Maintenance Type [Corrective- Preventive]- Maintenance requests from Manufacturing Order- Maintenance calendar- Different views
5. Reporting: Maintenance Requests- Different views-filter- group by
6. Module Access rights

Product Lifecycle Management (PLM)

1. PLM Overview: ECO types- ECO stages- Approvals- ECO tags- Creation and Configuration- Each and every fields
2. Engineering Change Orders: ECO request- Product Revision- BoM Revision- ECO stages- Approval for revision
3. Master Data:
    - **Products:** Product Types - Product categories- Each tabs, fields, smart tabs inside product form-

- **BoM**: Creating BOM for products- Components- Operations-Setting QC points- By Products- Manufacturing readiness- Consumption Flexibility- BoM Types- Cost and Structure- Routing Performance- ECOs- multi BOMs- each and every fields
- **Workcenter:** Creation - Alternative workcenters- Production Information- Costing Information- Equipments- Iot triggers- Performance- OEE- each and every fields

4. Reporting: ECO report- Different Views
5. Module Access rights

Quality

1. Quality Overview: Quality teams and configurations
2. Configuration: Quality Teams- Creation- Quality Alert Stages- Quality Tags- quality worksheet Templates
3. Quality Control: Creating Quality Control Points for different operations, products and product categories- each and every fields- Quality Checks- Quality Alerts- Corrective Actions- Preventive Actions
4. Products- Product Variants- Lot/Serial Numbers
5. Reporting: Quality Checks- Quality Alerts- Different Views
6. Module Access rights

Repairs

1. Repair Orders: Create- Set Priority- Add/Remove Parts- Invoice Method [No invoice- Before Repair- After Repair]- Quotation- Repair Notes- Quotation Notes
2. Configuration : Repair Order Tags
3. Reporting: Repair Orders- Different Views- Group By- Filter

Website & Ecommerce

1. Dashboard
    - Website & Ecommerce Dashboard: Company Data- Payment Methods- Taxes- Ecommerce Sales Analysis- Filters- Comparison- Favorites

- Analytics: Visits- Sessions- Google analytics Data for websites- Last week- Last month- Last year

1. Configuration- Enabling Features:
    - **Select the Website to Configure** [Create website [Odoo Default themes & templates]- Choose website]
    - **Website** [Go to Website- Pick a theme- Add features- Install & setting language- Domain- Specific User Account- Content Delivery Network (CDN)-Default Social Share Image- Cookies Bar- Social Media- Events PWA]
    - **Features** [Google Maps- Twitter Roller- Slides- Live Chat- Customer Account]
    - **Products** [Variants- Optional Products- Digital Content- Wishlists- Product Comparison Tool- Inventory management - Stay on page after adding to cart- Base Unit Price]
    - **Pricing** [Product Prices- Tax-Included- Tax-Excluded- Pricelists- Discounts- Sell in Multi-Currencies- Coupons & Promotions- Gift Cards]
    - **Shipping**[Shipping address- Shipping Cost- FedEx- bpost- UPS- DHL- USPS- Easypost]
    - **Invoicing** [Invoicing Policy- Automatic invoice]
    - **Orders Followup** [Assignment- Abandoned Carts- Confirmation Email]
    - **Communication** [Contact Form]
    - **Web Push Notifications (Social app)** [Enable Web Push Notifications- Use your own Firebase account
    - **SEO** [Google Analytics- Console Google Search- Google Analytics Dashboard]
2. Website: Create website- Both front end and Back end operations- Each and every Fields- Creating Pages-Manage Pages- page Properties- Menu Creation- Designing website- Different Snippets [Donation, Embed Codes-Color Gradient- Background shapes & animations-search snippets- Video building blocks and other snippets, styles]- Structures - Styles- options- Features- Dynamic Content- Inner contents- Website customisations- HTML/JS/CSS editor- Optimize SEO- link Tracker- Publishing Website- Switching websites and languages- Language Translation- Customize features in all pages of website like shop, blog, courses,events, appointment, contact us etc- Apps- pages- Redirects- Website Menu- chat rooms
3. Ecommerce: ecommerce shop customizations- Product creation and customization- Customize features- Add to cart- Buy now -Filter by prices- product comparison- Sort by- views- Inventory management- Ecommerce Category and Attributes listing- Inventory

management of products- setting Alternative product & Optional products- Payment using acquirers- Automatic Invoicing- Online payment

4. Payment Acquirers: Activation - Configuration- Online payment using acquirers- Shipping Methods- Shipping Cost - Saved Payment Data- Payment Transactions- Payment Icons- Online payment from customer portal- managing payment method from my account.
5. Orders: Website orders- Unpaid Orders- Abandoned Carts- Customer management
6. Product creation and Importing
   Product Types - Product categories- Each tabs, fields, smart tabs inside product form- Product Packaging- Publishing in Website- Inventory management- Ecommerce category - Digital products
7. Product variants creation and importing
   Attributes creation - variants creation mode - Variant pricing - Variant importing- Attribute Categories- eCommerce filter Visibility
8. Promotions & Coupon: Sending Coupons- Apply promotion on website sale- Discounts- Rewards- Pricelists: Applying multiple prices- Each and every fields in the form
9. Blogs: Creating Blog post- Publishing in website- SEO meta data- Blog- Tags- tag Category- Customize
10. Forum: Creating Forum- Forum Posts -Tags- Setting Ranks- Granting badge through challenges- Close reasons- Customize
11. Online Appointments- Schedule appointments- setting Availability, slots,Questions and messages- publish in website
12. Twitter Walls: Walls- Tweets
13. Visitors: website visitors- Views to Urls & Pages
14. Groups: Mailing List Groups- List Moderation Rulings
15. Reporting: Online Sales analysis- Group By- Filters- Different View
16. Module Access rights

HR Modules

Employee

1. Employee overview: Employee creation- filter by company & department

2. Configuration: Features:
    - **Employees** [Presence Control- Advanced Presence Control- Skills Management]
    - **Work Organization** [Company Working Hours]
    - **Employee Update Rights** [Employee Editing]
    - **Extra Time of Allocation** [Extra Time Off Allocation on contract signature]
3. Employee creation- each and every field- tabs- Smart tabs
4. Resume [Skill management module- Skills- Tags- resume Types] - work information- Private information- HR settings
5. Creating Departments- Job Positions- Work Locations- Departure Reason- Planning Types- Plans- Launch plan to employee
6. Employee contract-Templates- Adding salary information and other incentives- salary structure- working time- Related User- Employee challenges- Badges- Goal History- salary Package configurator
7. Employee directory- Schedule Activity form kanban view
8. Reporting: Contract- Employee Presence- Group By- Filters- Different View

Recruitment

1. Recruitment Overview: Job Positions
2. Configuration- Features:
    - Job Posting- Online Posting
    - Interview forms
    - Salary Package Configurator
3. Department creation
4. Job Position: Create job position- adding description- Publish in website- Applicant management- Interview stages- recruiting-Refusing- Refuse reason- Employee conversion- Tags -Degrees- sources of Applicants- Departments- Activity Types
5. Application: By job positions- All Application
6. Reporting: recruitment Analysis- Group By- Filters- Different View

Referrals

1. Configuration: Onboarding messages- Create friends & Levels- Referral Rewards
2. Dashboard: Choosing Avatar- Level up points- View jobs- Email a friend-Rewards

3. Refer friend- share in social media- Alerts- referral points
4. Reporting: Employees Referral Analysis- Group By- Filters- Different View

Attendance

1. Configuration: Employee Pin- Count Extra hours
2. Check In/Check Out- Kiosk Mode -Use employee pin to mark attendance
3. Attendance: Attendance check- employees- Extra time
4. Reporting : Attendance Analysis- Group By- Filters- Different View

Appraisal

1. Appraisal overview: Appraisal Requests- Status- Filter- Group By- Different views
2. Configuration- Feature enable:
    - Appraisal plan - 360 Feedback
    - Feedback Templates: Employee Feedback Template - Manager Feedback Template
3. Appraisal: Request- Private Note- Appraisal Plans -Goals & Skills- Evaluation Scale- Surveys- Ask Feedback
4. Report: Appraisal Analysis- Group By- Filters- Different View

Surveys

1. Survey Overview: Create survey- Types of questions- Description- Options for questions [layout- Progression Mode- Survey Time Limit- Selection], Candidates [Access Mode- Appraisal Managers Only- Login Required- Attempts Limit], Scoring, Live Session
2. Questions- Suggested Values-Participations- Detailed Answers

Expenses

1. Expense dashboard: My Expenses to Report- My Expenses to Report- My Reports- Expense Status
2. Configuration- features enable:
    - Incoming Emails
    - Reimburse in Payslip
    - Expense Digitalization (OCR)
3. Expenses: Expense product [Create- Invoicing Policy- Re-Invoice Expenses]- Create expense- Activity Types- Each and every field- Paid By- Submit- Reimbursement- Expense from incoming mail
4. Expense Reports: Expense Reports to Approve- Expense Reports To Post- Expense Reports To Pay- All Reports- Report Status
5. Reporting: Expense Analysis- Group By- Filters- Different View

Time Off

1. Time off overview: Dashboard- Different views- New Time off- New allocation
2. Configuration:
    - Time off type: Create - each and every fields- Time off approval- Allocation Approval- Allocation to time off type- Time off request- Deduct Extra Hours- Attach supporting Documents
    - Allocation request- Time off request -Activity Types
3. Managers: Time off- Manager Approval- Manager Allocation [Regular Allocation- Accrual Allocation]- Mode [employee- Company- Department- Employee Tag] -Accrual Plans- Public Holidays
4. My Time Off: My time off Requests- My Allocations
5. Everyone: All Time Off- Group By- Filters- Different View
6. Reporting: Time Off Analysis [By employee- By time off Type]- Allocations- Group By- Filters- Different View

Payroll

1. Payroll overview- Employee- Contracts- wage- Salary information- Attachment of Salary- Contract status
2. Configuration feature enable:
    - Payroll rules- HR Localisation package-
    - Accounting : Post payroll entries to accounting - Payroll SEPA
    - Deferred Time Off
3. Salary structures- Structure Types- Rules - Other inputs- Working times- Work entry types
4. Work entries- Conflicts [Approve /Refuse]- Time off to Report
5. Generating Payslips- Status- Payslips To Pay- All payslips- Employee Payslips- Payslips Batches- calculation- reimbursing employee expense in payroll
6. Reporting: Payroll Analysis- Work Entry Analysis- salary Attachment report- Meal Vouchers- Attachment of Salary- Group By- Filters- Different View

Approvals

1. Configuration : Create Approval Types - Options- Approvers
2. My Approvals: New Request creation- Approvals- My Requests
3. Products & Variants
4. Manager: Approvals to Review- All Approvals

Planning

1. Planning overview: Schedule by Resource- Schedule by Role- By Project- By Sales Order- Open shift assigning- Send & Publish- Copy previous week plan
2. Configuration feature:
    - Allow Unassignment
    - Recurring Shifts
3. Creating Roles- Shift templates- Shift recurrence- assigning to employee- employee unassignment - Employee shifts/My shifts- Resources
4. Reporting: Planning analysis -Group By- Filters- Measures- Different Views- insert in spreadsheet

Timesheets

1. Timesheet overview: Timer- Adding timesheet- My timesheet- All Timesheet- Timesheet to validate [Last week- Last month]- Validating timesheet
2. Configuration feature enable:
   - **Time Encoding** [Encoding Unit-hrs/day]- Awesome Timesheet
   - **Billing** [Time Billing, Invoicing Policy]
   - **Timesheet Control** [Employee Reminder- Manager Reminder]
   - **Record Time Off**
   - **Time Billing**
3. Reporting: Timesheets By Employee- Timesheets By Project- Timesheets By Task- Timesheets By Billing Type- Timesheet / Attendance- Group By- Filters- Measures- Different Views- insert in spreadsheet

Fleet

1. Fleet overview: Vehicle- Fleet management stages
2. Configuration features: End Date Contract Alert- New Vehicle Request
3. Vehicle Management: Vehicle Models- Model category- Service Types- Manufactures- Vehicle Status- Vehicle Tags- Activity Types- Create Vehicle- each and every field-Smart tabs- Driver assignment- Vehicle contract management- vehicle service management- Service Types & Cost-Odometers
4. Mobility card- disallowed expenses from fleet
5. Reporting: Cost analysis

Lunch

1. Lunch module overview: Categories- vendor
2. Configuration features:
   - Lunch Overdraft
3. Vendors - Products- product Categories- Locations
4. Lunch Alert- Order [Creation- New Order- My Order History- My account History]
5. Manager [Today's Orders-Control Vendors- Control Accounts- Cash Moves]

**** Access rights of every HR module must follow**

Marketing Modules

Email Marketing

1. Configuration features:
    - Mailing Campaigns
    - Blacklist Option when Unsubscribing
    - Dedicated Server
2. Mailing: Creating [Mailing Lists-Mailing List Contacts]- Mass mailing- Mail status- Creating Mail body- Use of Dynamic Placeholder Generator- Using dedicated server for mailing- Settings- Each and every field- Link Tracker
3. Email campaigns: Create [Campaign Stages- Campaign Tags- email Campaigns]- Sending mails/sms/push notifications/social post- Lead generation from marketing campaign- Revenue obtained- Quotations- Each and every field
4. Blacklisting Email Addresses
5. Report: Mass Mailing Analysis- Group By- Filters- Measures- Different Views- insert in spreadsheet

SMS Marketing

1. SMS Marketing: Creating [Marketing SMS- SMS content- Settings- mailing contacts- Use of Dynamic Placeholder Generator]- Each and every field
2. Create: Contacts - contact lists- Campaigns- Use and configuring SMS campaign- Each and every field- Link Tracker- Blacklisting Phone Numbers
3. Report: SMS Marketing Analysis- Group By- Filters- Measures- Different Views- insert in spreadsheet

Social Marketing

1. Configuration features:
    - Facebook Account Configuration: Use your own Facebook Account
    - LinkedIn Account Configuration: Use your own LinkedIn Account
    - Twitter Account Configuration: Use your own Twitter Account

- Demo Mode: Enable Demo Mode

2. Overview: Demo Data- Add stream from existing accounts/link new accounts- Add New post on social media & website- Managing posts from social marketing modules- Synchronise
3. Posts: Creating social posts- Add New post on social media & website- post status
4. Campaigns- Visitors- Communicate with visitors- Social Media, Social Accounts &Social Streams using

Marketing Automation

1. Marketing automation of Campaign: Creating Campaigns- Targeting specific audiences- Creating automated actions on various activity- each and every fields- Smart tabs
2. Reporting: Link tracker- traces of activities- Participants

**** Access rights of marketing modules must follow**

Small Modules

Consolidation

1. Dashboard: Overview- Need & Scope of consolidation- Chart of Accounts- Analysis period
2. Consolidation: Creating Consolidated Companies- Target to a particular currency- creating Account groups and Consolidated accounts to groups- setting Company periods- Analysis period- Creating Consolidated reports of multi company- Consolidated Entries

Studio Module

1. Toggle Studio- Customisation [Change background- Import- Export]
2. Creating New App- Use of New Model & Existing Model- New Model Features [Contact details- User assignment- Date & Calendar- Date range & Gantt- Pipeline stages- Tags- Picture- Notes- Monetary value- Company- Custom Sorting- Chatter- Archiving]

3. Customisations on different views- Form view: Adding New fields [Text- Multiline- Integer- Decimal- Html- Monetary- Date- Date & Time- Checkbox- selection- File- One2Many- Many2many- Many2one- Image- Tags- Priority- Signature- Related Fields]- existing fields- Components [Tabs- Columns]- View & Properties of each fields- setting fields Invisible/Required/Read only based on conditions- Default values-Limit visibility to groups- Setting Approvals on buttons
4. PipeLine status - Smart buttons- Adding Menus- Customising Reports- Reload from attachment- Translations- Setting automated Actions- Access Controls- Creating filter Rules- Sorting- Mass editing- Website customisation

Subscriptions

1. Subscription Template: Creating template- Invoicing- Terms and conditions- Health Check
2. Subscription Stages- Rating Email Template- Subscription Alerts [Applying actions on conditions]- Close reason- Activity Types
3. Creating Subscriptions- Subscription products- Subscription to renew- Upsell- Changes in subscription- Subscription closable by customer
4. Reporting: Subscriptions Analysis- Retention Analysis- Revenue KPIs- Salesperson Dashboard- Group By- Filter- Different views

Events

1. Events Overview: Events and stages
2. Configuration features:
    - Events [Schedule & Tracks- Live Broadcast- Event Gamification- Community Chat Rooms- Online Exhibitors]
    - Registration [Selling Tickets- Online Ticketing- Questions]
    - Attendance [Barcode & Barcode Nomenclature]
3. Event Templates [Setting Location- Communication mail templates- Limiting no. of seats- Attendee management- Automatically Confirm Registrations- Questions to Attendees]- Event Stages- Events Mail Schedulers- Event Tags Categories

4. Events: Creating Events - Adding event Template- Event Tracks creation- Each and every field- track Stages- Track Locations-Track Tags- Track Tag Categories- Track Visitors- Event Sponsors- Sponsor Types- Event Attendees- Rooms- Quizzes- Quiz questions- Ticket management- Publishing event in website- Website menus- Event Registration & Registration Desk- Event Badges
5. Reporting: Events Analysis- Attendees- Different views, group by & filter data

Rental

1. Rental Overview: Rental Status- Invoice status
2. Configuration features:
3. **Rental [** Default Padding Time- Default Delay Costs- Digital Documents**]**
1. Rental Products: Create rental products- setting Rental Pricing & Reservations- Customer creation
2. Rental Orders: Create orders- Orders to pick up- Orders to return- Scheduled Rentals- Status and color coding- Signing rental Agreement- - rental return & Invoicing
3. Report: Rental Analysis- Different views, group by & filter data

Data Cleaning

1. Need for data cleaning module
2. Configuring Rules:
    - **Field Cleaning Rule**: Create cleaning rules on different models- Cleaning Mode Manual/Automatic- Notify Users- Field cleaning record generation- Applying rule on records
    - **Deduplication Rules**: Create deduplication Rules on different Models- Merge Mode- Duplicate Removal- Notify Users- Each and every fields- generating duplicate records- Merging Records

Documents

1. Document Management: Uploading documents- Requesting Document- Sharing Document- Filtering documents by workspace and tags
2. Configuration Features:
    - **Files Centralization** [Human Resources- Product- Project- Recruitment- Accounting]
3. Create workspaces- Tags- Access rights to workspace- Creating Workflow Actions- Applying Actions on documents- Sharing documents- Splitting large documents- Replacing Document- Spreadsheet templates- Shares & Emails

Elearning

1. eLearning Overview: Courses details- Review- Duration- Attendee details
2. Configuration Features:
    - **eLearning** [Forum- Mailing- Certifications- Sell on eCommerce]
3. eLearning Courses: Create Groups- Course tags- Creating Course [Course type- Access rights- Karma Reward Points & Access Rights- Smart tabs- each and every field]- Course contents [Content document Types- Adding Additional Resources- Quiz questions and rewards- Statistics]- Certification- Publishing and selling course in online
4. Creating certifications
5. Course review and rating- eLearning Forums & Posts
6. Reporting: Courses- Contents- eLearning Revenues- Rating- Quizzes-eLearning Forum Posts- Certifications- Different views, group by & filter data

Helpdesk

1. Helpdesk Overview: Dashboard- Performance data [Daily Targets- Happy Rating- Success rating]- Helpdesk teams analysis
2. Helpdesk Team creation: Configuration [Adding team members- Ticket Assignment Method- Incoming emails create tickets - Live chat- Website Form ticket creation- Sell & Track Hours- Invoicing- SLA Policies- Canned Responses- Customer Rating- Help Center- eLearning- Ticket closing-After Sales management like repair,refund, return, providing coupons- Field Service request raising]

3. SLA Policies: Create- Apply on helpdesk team- Priority- Ticket Type- Target stages
4. Help desk ticket creation: each and every field- Ticket Types- Ticket Tags- Assigning to team and responsible- Plan onsite interventions- Timesheets- All Tickets- My Tickets
5. Reporting: Helpdesk Ticket Analysis- SLA Status Analysis- Different views, group by & filter data

Field Service

1. Field Service Overview: tasks planned for today & future- Map view- Different views, group by & filter data
2. Configuration Features:
    - Time and Material:invoice your time and material
    - Extra Quotations
    - Worksheets
1. Worksheet Templates- Designing- Applying on projects & Tasks- Projects- Products- Service products- Service Invoicing Policy- Service Tracking- tags
2. Create Field service tasks- Assigning operator- Adding timesheets- Materials- quotations & Invoicing- My Tasks- All tasks [To schedule- To Invoice]- Map
3. Planning : By user- By Project- By Worksheet- Unassigned Tasks- Gantt view- Different views, group by & filter data
4. Reporting: Task Analysis- Different views, group by & filter data

Livechat

1. Creating Live chat channel- Configuring chat appearance- live chat in website- canned responses- Operators of live chat- Visitor management- Lead generation from live chat- Feedback
2. Report: Dashboard- Session History- Session Statistics- Operator Analysis- Customer Ratings- Different views, group by & filter data

Discuss

1. Discuss Inbox- Starred- history- creating private channel- Public channel- Setting Privacy and member to a channel- Direct messages
2. Canned response in messages- Creating leads, tickets and other tools

Dashboard

1. My dashboard: Adding filters to Dashboard-
2. Google spreadsheet: Add to google spreadsheets
3. Layout Changing

Calendar

1. Meetings in Calendar- Responsible & Attendees management- Syn with google- Syn with Outlook-Different views, group by & filter data
2. Online Appointments- Schedule appointments- setting Availability, slots,Questions and messages- publish in website
3. Reporting: Online Appointments -All Appointments- Different views, group by & filter data

Contacts

1. Creating Contacts: [Company- Individual]- Adding multiple addresses- each and every fields, Smart tabs- Importing contacts
2. Creating Contact Tags- Contact Titles- Industries- Countries- Fed. States- Country Group- Banks- Bank Accounts

Members

1. Members: Create & Import
2. Membership product configuration- Buying membership

Notes

1. Notes: creating - sharing- usage of collaborative pads- Stages- tags

Sign

1. Overview: Documents to sign- Uploading templates/Documents- Properties- Modify Templates- Sign requests- Signed documents- Share doc for signing- Add Field Types to Document- Signature Item Role- Signature Request Items

IoT

1. Need of IoT box- Connect an IoT Box- Overview on how devices connect with Iot Box- Connected devices

Barcode

1. Barcode Scanning- Scan operation type, locations,document- Inventory adjustments, batch transfer using barcode scanners.

**** Access rights of every module must follow**
**** General Setting**

1. **User Creation- Types of Users- Access Rights- Technical settings- Muli companies- Setting language- Timezone- user groups- record rules**
2. **Creating companies- Inter-Company Transactions**
3. **Supporting odoo Languages & Language translation**
4. **Setting external mail servers- create email templates- set paper formats**
5. **Decimal accuracy- Automated actions- scheduled actions**
6. **Sequence changing on different models.**

Small modules Day-1

- Email marketing , SMS Marketing, Marketing Automation, Social Marketing
- Consolidation
- Field service
- Helpdesk
- LiveChat
- Subscription
- Barcode
- Quality
- Documents
- Sign
- Members

Small modules Day-2

- Studio
- E-learning
- Survey
- Events
- Rental
- Data Cleaning
- Dashboard
- Contacts
- Calendar
- Discuss
- Notes
- IoT