

Reporting, Spreadsheet and Dashboard: use cases

Transform raw data into actionable insights



Before starting

In order to help you solving the use case, please refer to the link below for formulas to be used :

- a) [Spreadsheet - written documentation](#)
 - Subsections: Link Odoo data, Functions, Global Filters
- b) [List of Odoo formulas to be used](#)
- c) Some useful excel formulas for the use cases:
 - EDATE
 - NETWORKDAYS
 - \$ to block a column or row (F4 to block both)
 - SORTN
 - IF or IFERROR
 - VLOOKUP
 - AVERAGE AND AVERAGEIF
 - TRANSPOSE

First steps



- 1) Go to [DB template](#) and create a new database
- 2) **Implement** the 4 following **use cases**. Make sure to remember what you configured exactly (the 5th one is optional)
- 3) **Correct** each use case with your trainer.

Exercise 1: Sales Performance Spreadsheet

A **Sales Manager** requests a spreadsheet to monitor the team's sales performance and profitability **for a given month**.

They want to see:

- All **confirmed sales orders** from this month and:
 - Customer name
 - Salesperson
 - Order date
 - Total amount
 - Margin
- They need to be able **to sort** the list by Total Amount or Margin

Exercise 2: Let's play with the Pivot view

Who is the best salesperson of my company? I want to get a *nice* overview of the top 3 of my best salespeople, for a specific period of time (per month or quarter)

This overview should be done in the Dashboard app. In addition to that, I'd like to have a comparison between the sales performance and the monthly (or quarterly) KPI to be reached by the salesperson.

Exercise 2: expected result *(NB: you may have different values)*

rection

Select period...

Select year...

Merlin Bendlin

337,514.50€

↑2150.1%

Guilhem Vandenborre

275,742.00€

↑1738.3%

Damien Verlinden

268,277.50€

↑2582.8%

Exercise 3: Let's play with the List view

My company has a bad reputation for taking too long to deliver. I want to keep an eye on the issue.

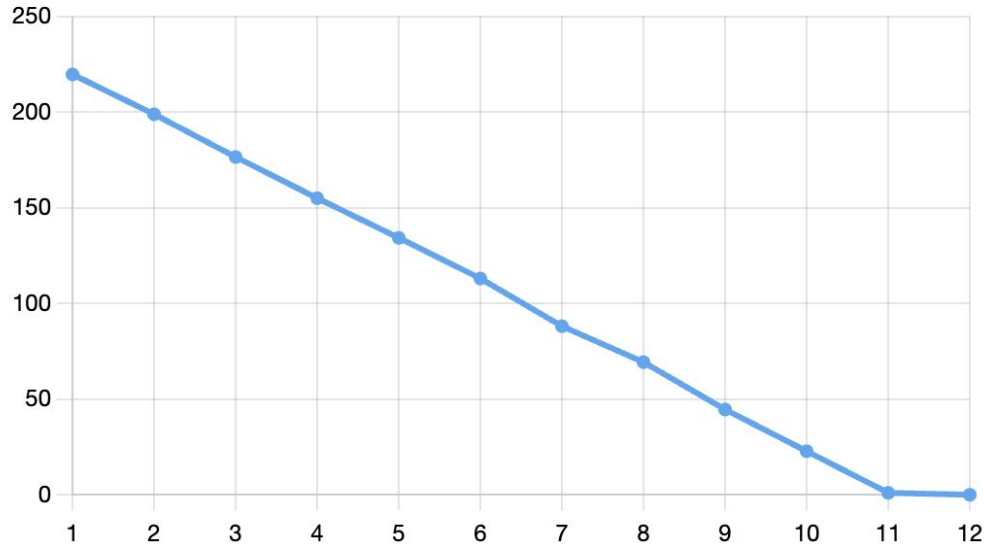
- Compute the average number of working days between the confirmation of the order and the first delivery.
- Then show the evolution of this average per month or per salesperson.

Exercise 3: expected result *(NB: you may have different values)*

2024

✕ Salesperson

Average delivery delay per year



Average delivery time

10.33033333

↑0.33

Exercise 4: Let's play with the Quote calculator

I have a Kitchen quotation template where I would expect automatic computation of the total sales price and transport **cost**, based on the client needs. It seems to be feasible in Odoo 18, how can it be done? —

Here is the current calculator we use

<https://docs.google.com/spreadsheets/d/1dJgO8lvDufhsMVgCWkfUTSMLaYyCM-dULoHVqbEZ2Jk/edit?usp=sharing>. Can we reproduce it in Odoo and link it to quotation lines?

PS: example is available here <https://www.youtube.com/watch?v=093AX4bjOik>

Kitchen Price Calculator

File Edit View Insert Format Data

% .0 .00 123 ▾ 10 ▾ B I G A ↩ ☒ ≡ ▾ ▾ ▾ ▾ ▾ ▾ f(x)

	A	B	C	D	E	F	G	H	I	J	K	L
1	KITCHEN FACTORY											
2		Client name:				Yellow fields should be adapted						
3		Quotation date:				Red fields are the output of the quotation calculator						
4												
5												
6												
7		Components to be added:	Count	Unit Price :	Subtotal :	Unit volume (m³)	Volume total (m³)					
8		Fridge		899	0	1.5	0					
9		Oven		399	0	0.7	0					
10		Microwave		129	0	0.3	0					
11		Dishwasher		399	0	1	0					
12		Hood		99	0	0.5	0					
13		Baking Tray		349	0	0.2	0					
14		Subtotal (components)			0		0					
15		Dimensions of the kitchen (in m):										
16		Length		149	0	0.2	0					
17		Height		119	0	0.2	0					
18		Number of doors		59	0	0.2	0					
19		Subtotal (dimensions)			0		0					
20												
21												
22		Total price of the kitchen :		0								
23		Total Volume		0								
24												
25		Vehicle										
26		Distance (km)										
27		Fixed cost										
28		Cost/km										
29												
30		Transport cost :	\$0.00									
31												
32												
33												

Transport costs

Volume min (m³)	Volume max (m³)	Vehicle	Fixed Cost (\$)	Cost/km
0	3	Small Van	\$50.00	\$0.25
3	6	Medium Van	\$75.00	\$0.30
6	10	Large Van	\$100.00	\$0.35
10	15	Light Truck	\$150.00	\$0.40
15	25	Medium Truck	\$200.00	\$0.50
25	40	Heavy Truck	\$300.00	\$0.60

Exercise 5 (optional):

How did my product sales evolve in the past 6 months?

This overview should be done in the Dashboard app. It should display the top 5 decreasing products, in terms of sales amount compared to the previous month (this month vs previous month).

Exercise 5: expected result (NB: you may have different values)

correction

September

2024

✕

Decreasing rate	Product name	M	M-1	M-2	M-3	M-4	M-5
-100.00%	[WINT006] Boots	0.00€	11,550.00€	0.00€	10,359.00€	7,462.00€	6,916.00€
-100.00%	[WINT003] Coat	0.00€	2,704.00€	0.00€	4,581.00€	9,939.00€	17,027.00€
-100.00%	[WINT002] Jacket	0.00€	4,116.00€	0.00€		13,142.00€	20,656.00€
-100.00%	[WINT005] Scarf	0.00€	624.00€	456.00€	3,828.00€	2,350.00€	960.00€
-100.00%	[SUIT001] Suit pants		6,351.00€		14,202.00€	9,301.00€	5,108.00€

