

INSTALLATION MANUAL

ODOO Power BI Connector

Before proceeding (Important) :

Please ensure that you have PowerBI Desktop installed on your Windows machine.

Requesting License Key :

Please visit following link : <https://odoo.techneith.com/request/>

The screenshot shows a web form titled "Request License Key". At the top center is a purple rocket ship icon. The form contains several input fields and dropdown menus:

- Your Name
- Select Odoo App
- Your Email
- Odoo Version
- Company name
- Select Python Version
- Sale Order Reference No. *
- Production Url (<https://www.abc.com>)
- Select Odoo Edition
- Staging Url (optional)

A large red "Submit" button is located at the bottom of the form. Below the form is a "Notes:" section containing the following bullet points:

- ** Please mention your python version like 2.x.x (2.6.x,2.7.x .. etc) or 3.x.x (3.6.x,3.7.x,3.8.x .. etc)
- If you are requesting for power-bi or tableau then make sure you have Power BI desktop or tableau desktop installed in your system
- Kindly note that the demo will be valid for 15 days only
- Please specify both Production and Staging URL (Testing) as the module would work on these instances only then.
- Please check protocol used with staging and production Url is either http or https but recommended one is https.

Fill the form. You will need following details :

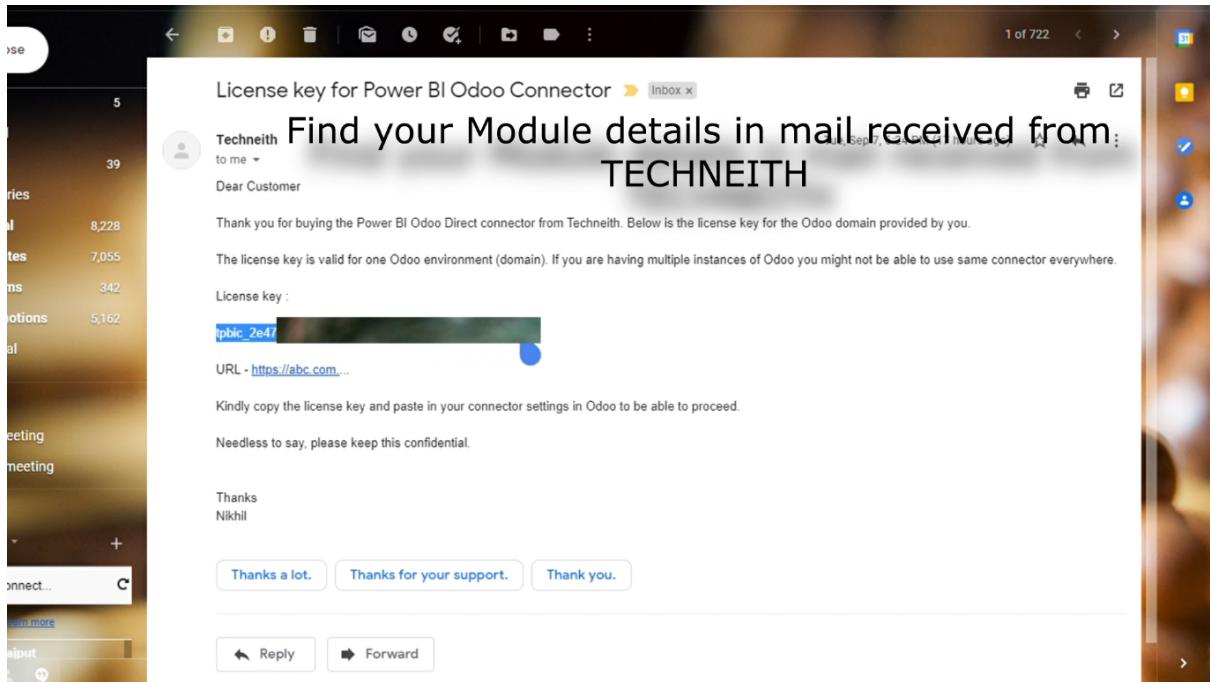
- Name
- Name of Organization
- Odoo Production and Staging URL
- Purchase/Invoice Number (your odoo purchase order number)

On submitting the form successfully you will receive your license key on the e-mail you mentioned in the form within 24 hours.

STEP 1 : Module Verification

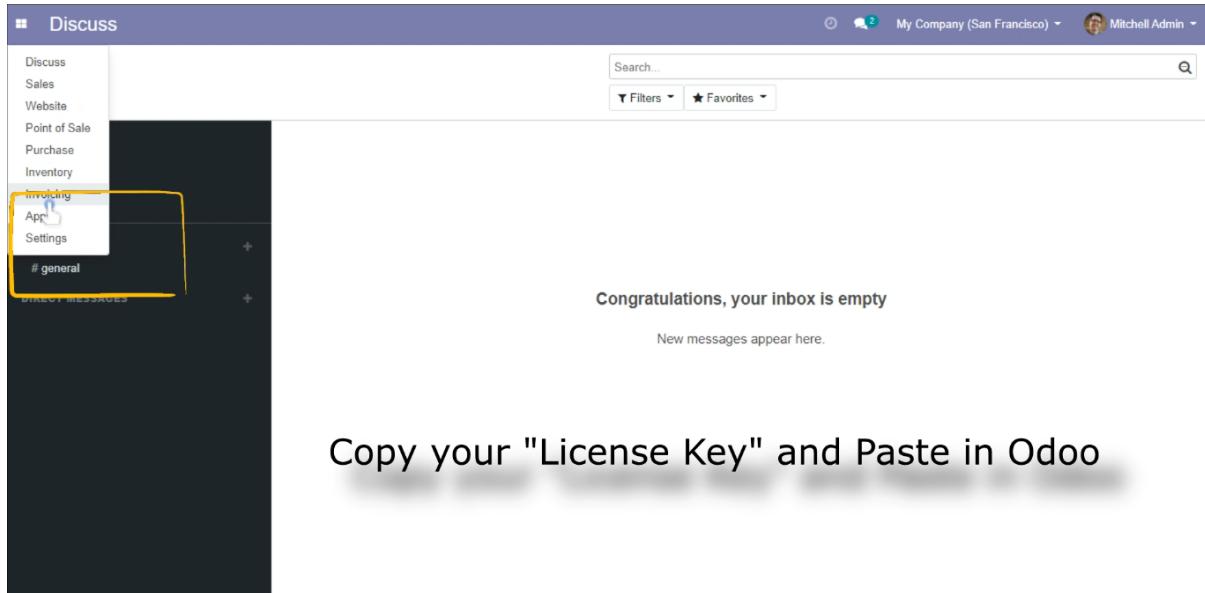
Install Module on your Odoo and follow below steps to verify your module

1.1 : Copy your License Key from email received from Techneith



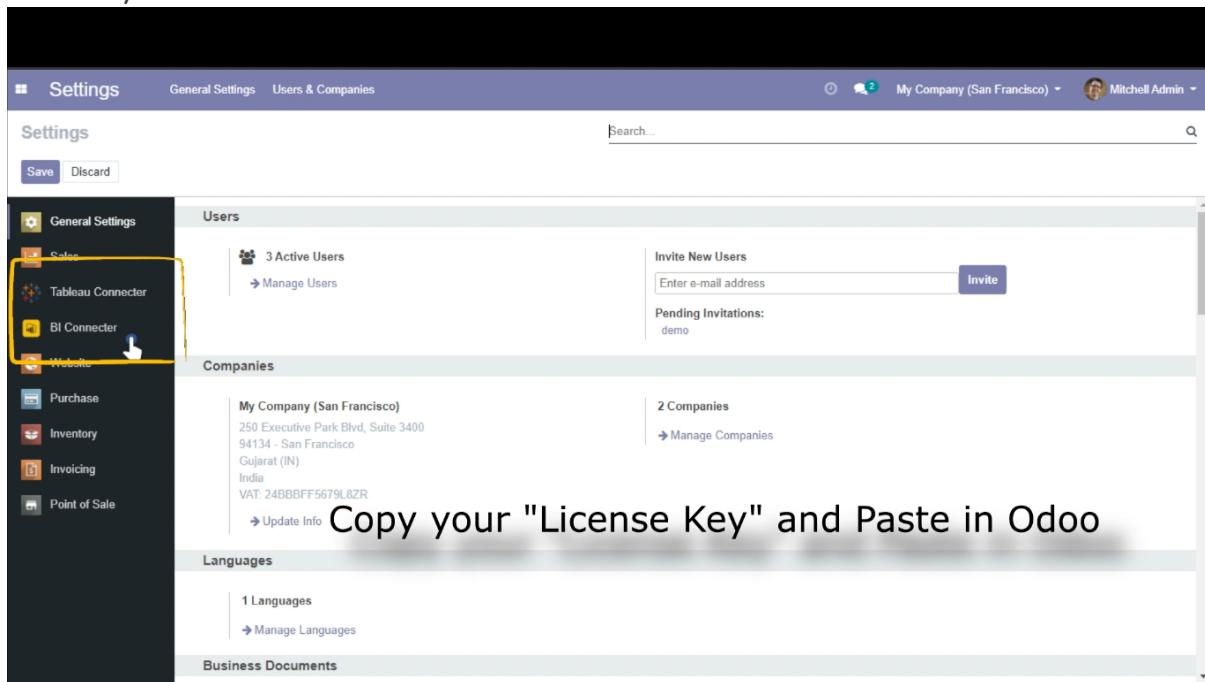
1.2 : Head to your OODOO and make sure you have installed the **PowerBI Connector Module.**

Once you have installed the module go to the **Settings** page.



Copy your "License Key" and Paste in Odoo

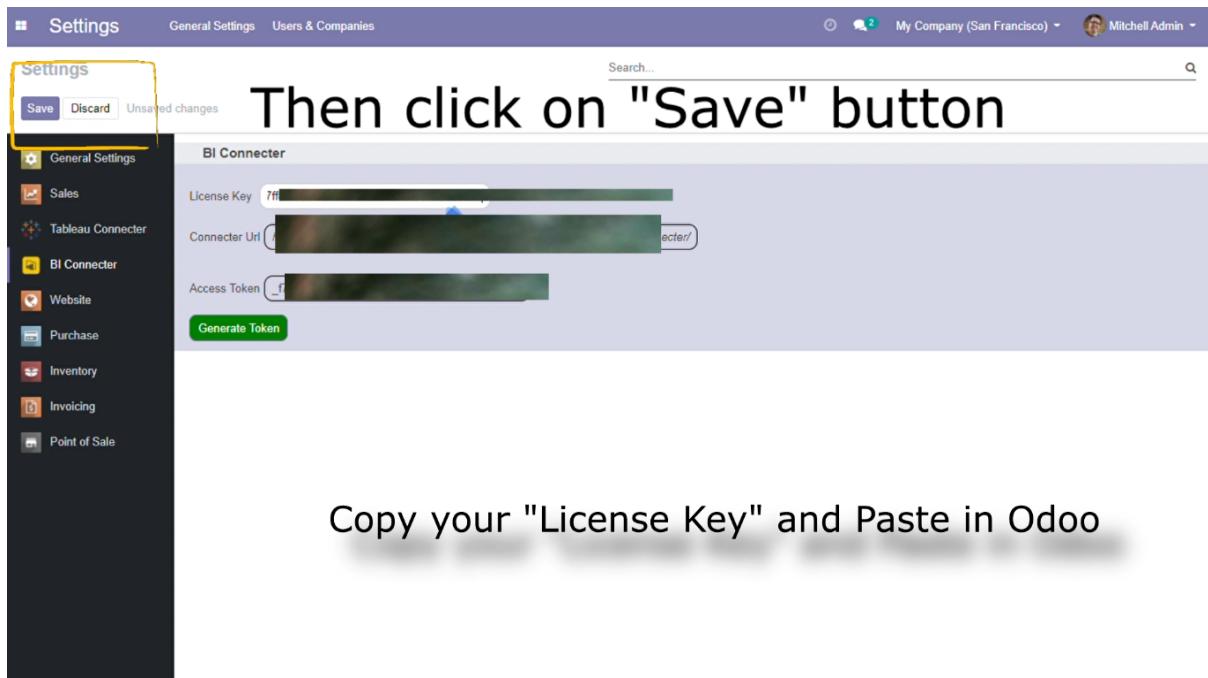
1.3 : **Click Bi Connector on left panel** (this will be available only after PowerBI Connector Module is installed on your OODOO)



1.4 : Paste your License Key in the License Key field (was copied in **Step 1.1**).

Then click Save and then Generate Token

(This generates your credentials to be used in PowerBI Desktop)



STEP 2 : Desktop Configuration

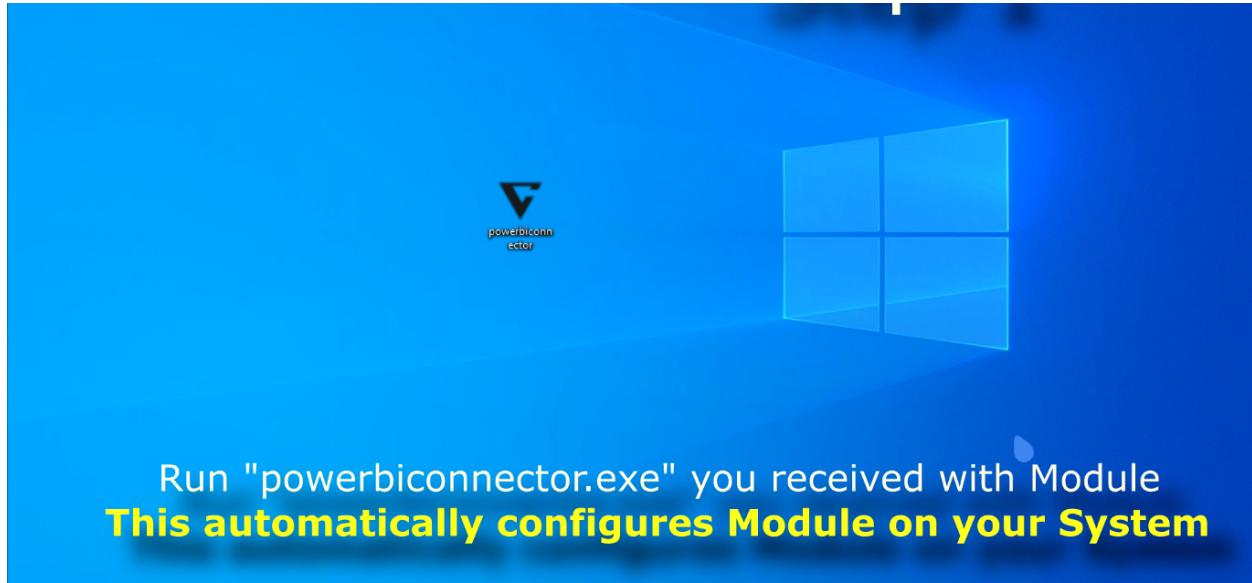
Use the below link to download the EXE file and run it on the Windows machine on which Power BI Desktop is installed.

Link :

<https://www.dropbox.com/s/y7xmd9xa252ovbg/powerbiconnector-3.exe>

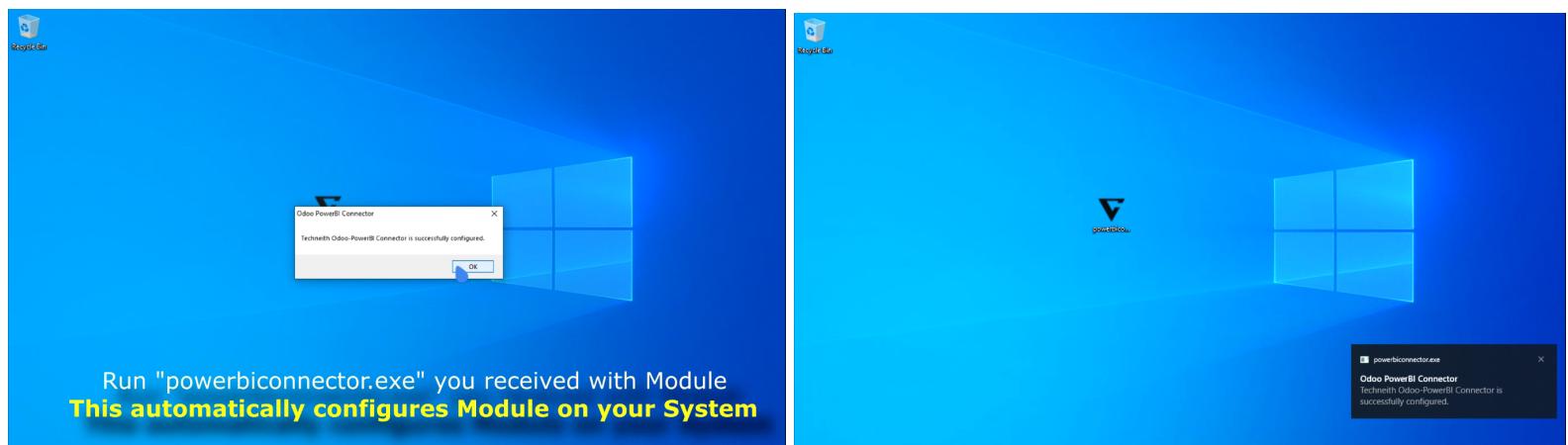
Run **powerbiconnector.exe** on your Windows machine.
(Right click on **powerbiconnector.exe** and click **Run as Administrator**)

This configures your PowerBI Desktop with Odoo Connector



After Running **powerbiconnector.exe** you can see feedback message and notification (as shown in below images)

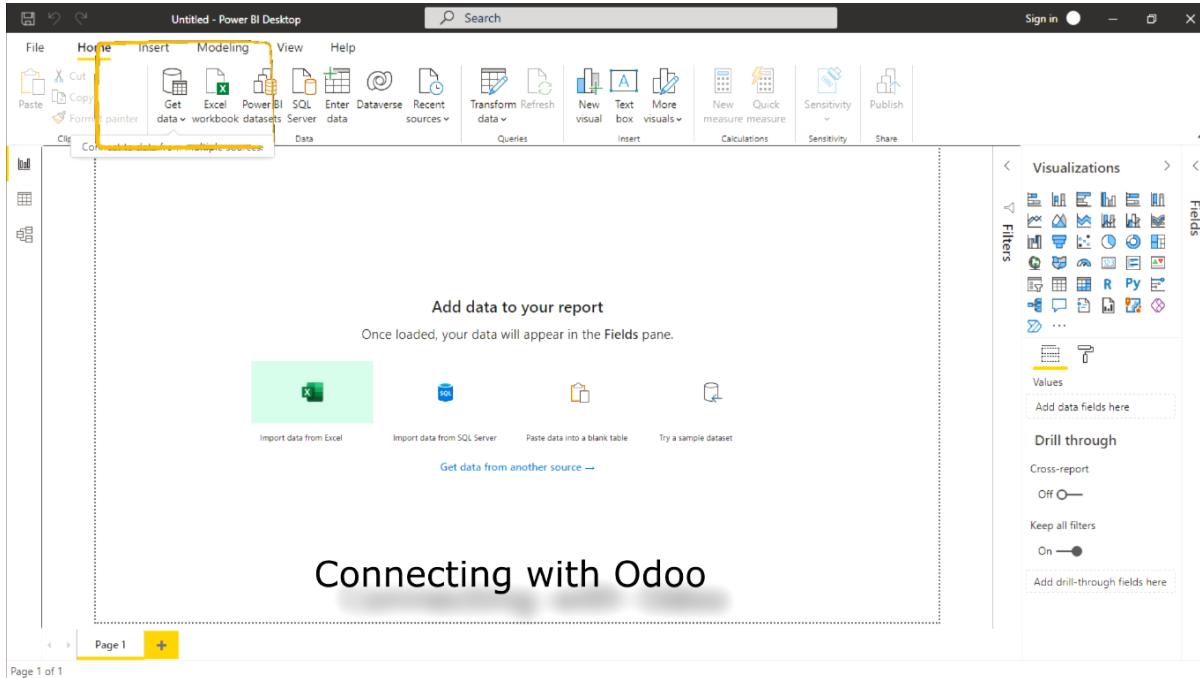
This confirms our configuration is done successfully



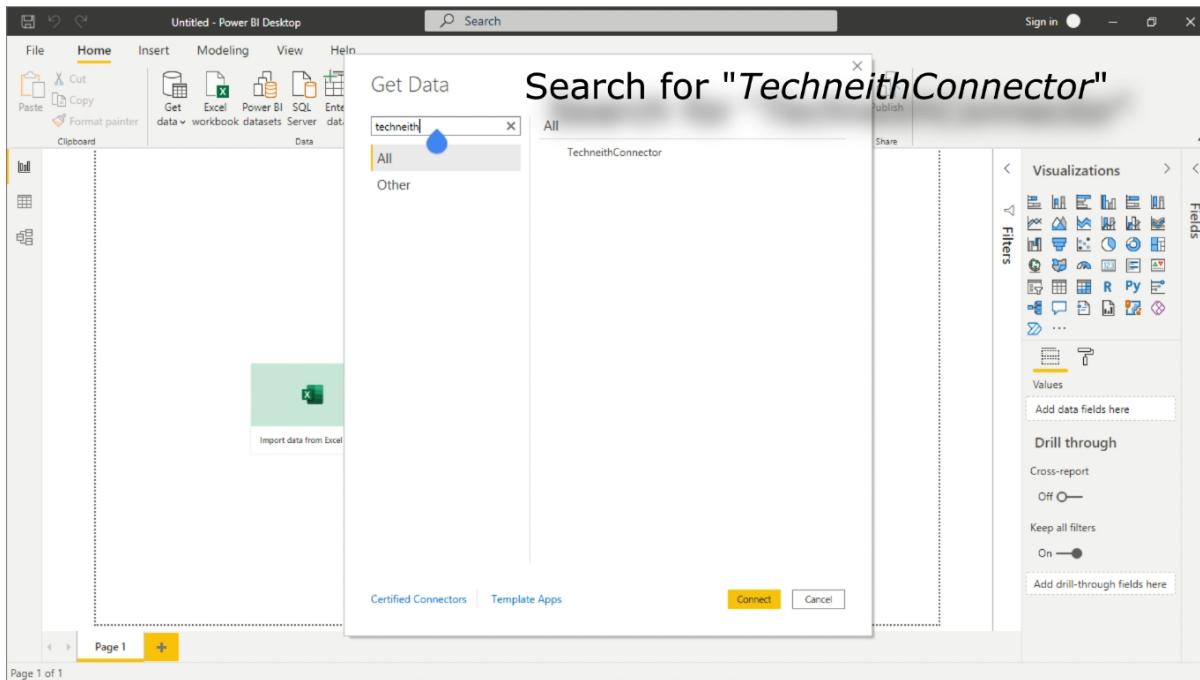
STEP 3 : Connecting with Odoo

Follow below steps to connect PowerBI with OODOO

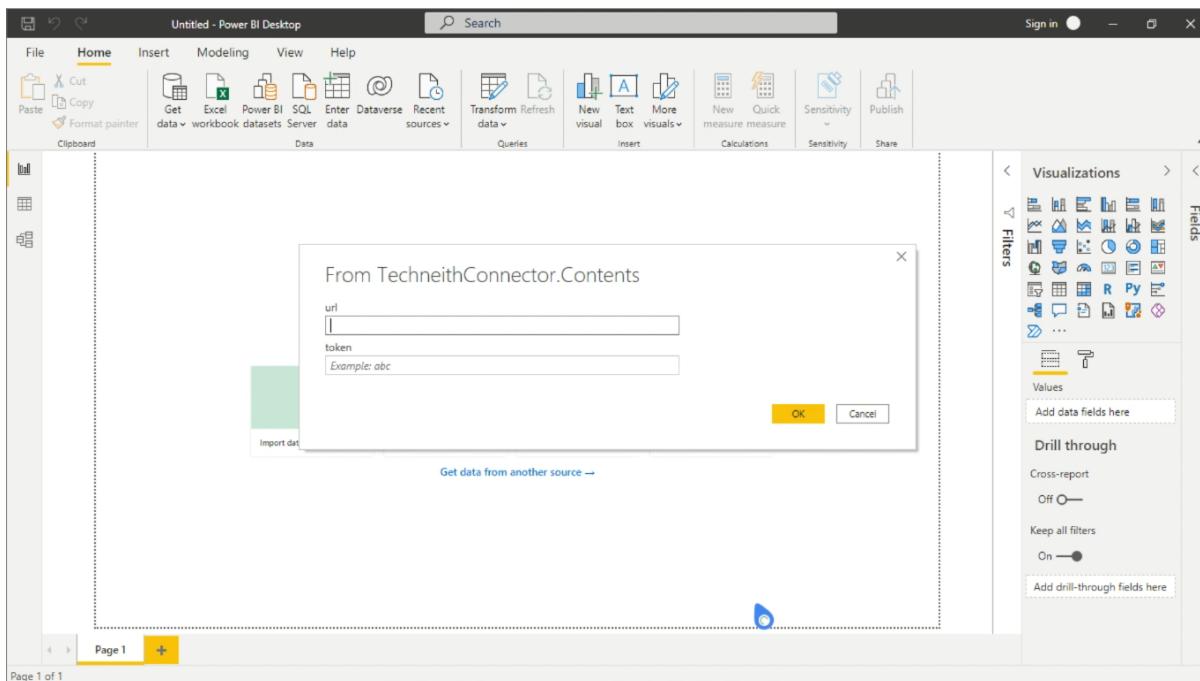
3.1 : Click **Get Data** on Home Tab in PowerBI Desktop



3.2 : Search for **TechneithConnector** in the Get Data window. Then click **Connect**.



You will see the following screen.



We will fill these contents in Step 4

STEP 4 (A) : Linking and Data Fetching

Follow below steps to link connector and fetch data (If you didn't fill the query)

4A.1 : Copy and Paste Connector Url and Access Token from OODOO (generated in step 1.4) to PowerBI Connector window (left in step 3.2)

The screenshot shows the Odoo Settings interface under General Settings. On the left sidebar, there are several icons including Sales, Tableau Connector, BI Connector, Website, Purchase, Inventory, Invoicing, and Point of Sale. Under the BI Connector section, there is a 'License Key' field with placeholder text 'tp...', a 'Connector Url' field with placeholder text 'http://...', and an 'Access Token' field with placeholder text 'Exemple abc...'. A green 'Generate Token' button is visible. At the top, there are 'Save' and 'Discard' buttons, and a message 'Unsaved changes'.

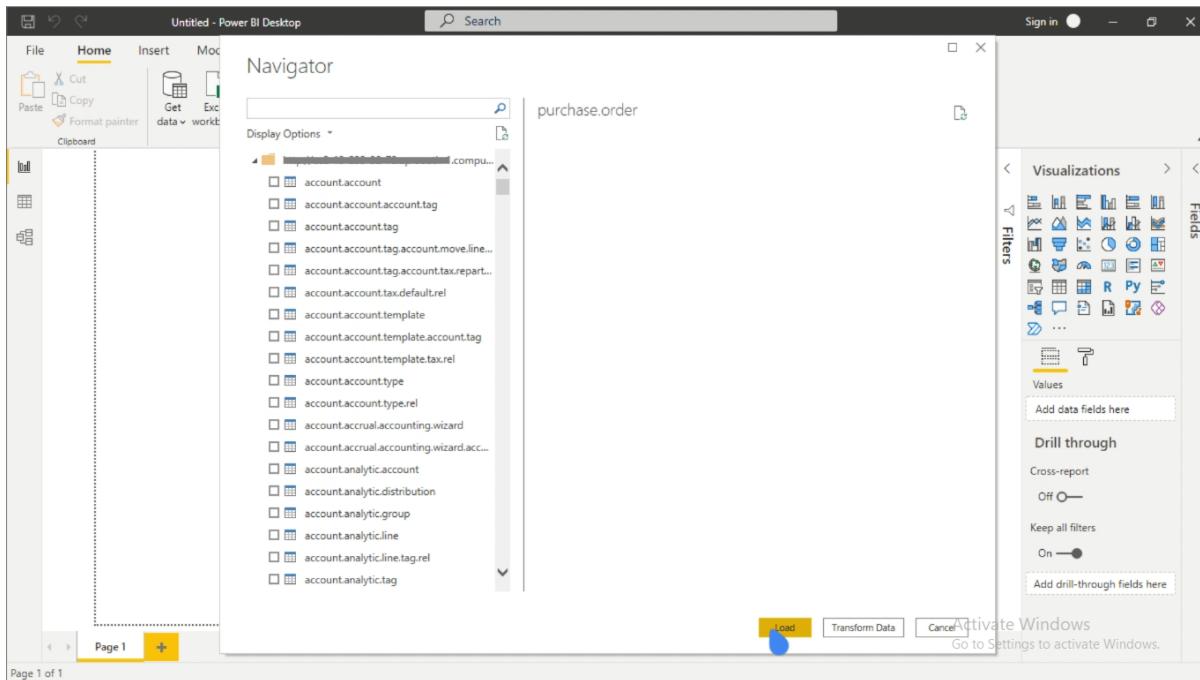
Copy from here and Paste Connector Credentials to PowerBI Desktop

The screenshot shows the PowerBI Desktop interface with a 'Get data from another source' dialog box open. The dialog contains fields for 'url' (with placeholder 'http://.../tableau') and 'token' (with placeholder 'Exemple abc...'). Below the fields are 'Import data' and 'OK' buttons. The main PowerBI Desktop window shows a blank report area with a 'Visualizations' pane on the right containing various chart and table icons.

Copy from here and Paste Connector Credentials to PowerBI Desktop

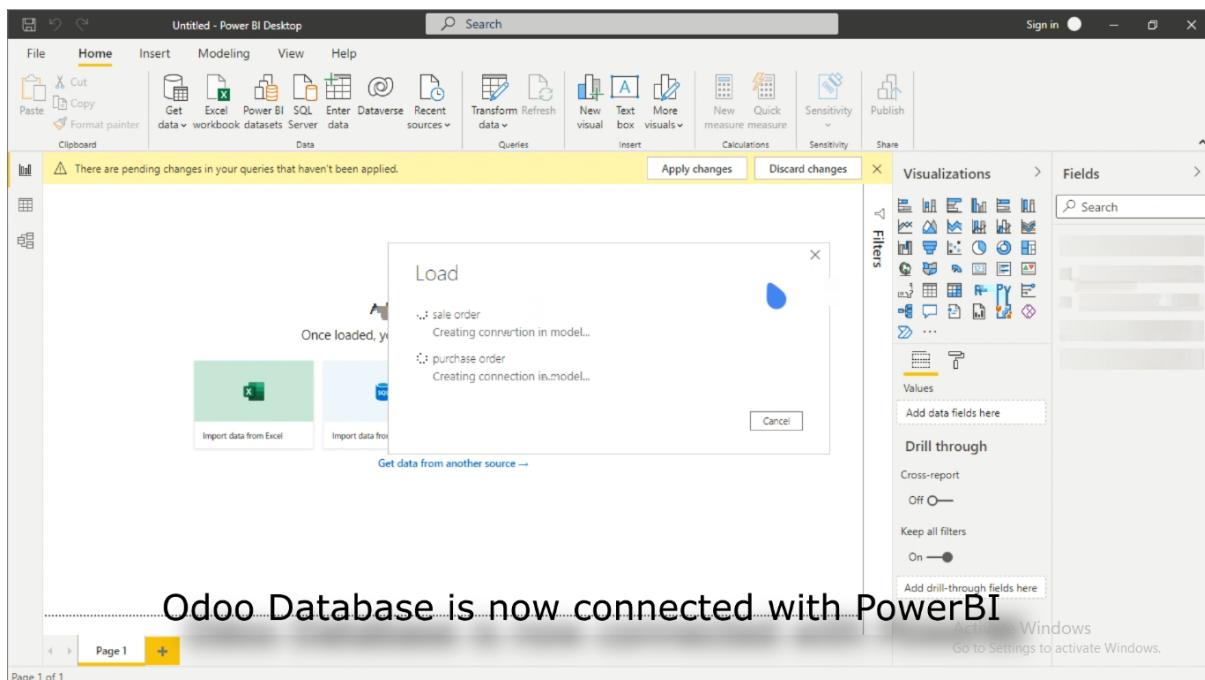
After step 4A.1 click OK.

4A.2 : You can see **tables** from your OODOO database.
Select tables you want to continue with in PowerBI and click Load.



4A.3 : Tables are being fetched and You can see loading as shown in the below image.

Note : Time to load data depends on the size of data to be fetched



4A.4 : Odoo Database is now connected successfully with PowerBI Desktop and you can see content of your tables

The screenshot shows the PowerBI Desktop interface with a table titled "Tables from Odoo Dataset". The table has columns: access_token, state, date_order, validity_date, create_date, confirmation_date, user_id, partner_id, partner_invoice_id, partner_shipping_id, and partner_ref. The data consists of approximately 58 rows of sales order information. To the right of the table is a "FIELDS" pane listing various Odoo fields such as sale_order, activity_date_due, amount_tax, amount_total, amount_total % diff, amount_total average, amount_unpaid, analytic_account_id, campaign_id, client_order_ref, company_id, confirmation_date, count of order_date, count of state % diff, count of state total, create_date, create_uid, date_order, fiscal_position_id, and name. The PowerBI ribbon at the top includes tabs for File, Home, Modeling, and Help.

How to
Reflect Data change in PowerBI Desktop
if there is change in data in ODOO

Click on the Refresh in Home tab.
 (This loads and reflects the changes happened to data in ODOO)

Table: financials (700 rows)

Note : If you are using this module on trial. Visit www.techneith.com to make this module yours for lifetime. It is a one time price you pay on our website and enjoy for lifetime.

For any queries contact us at info@techneith.com