Installation Guide

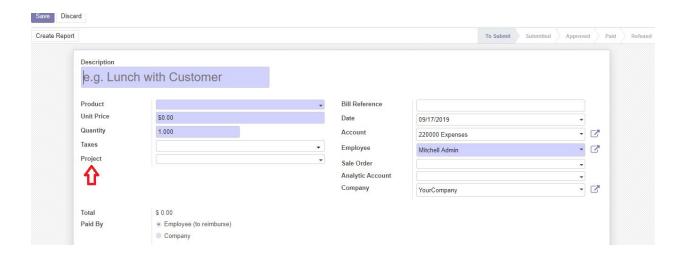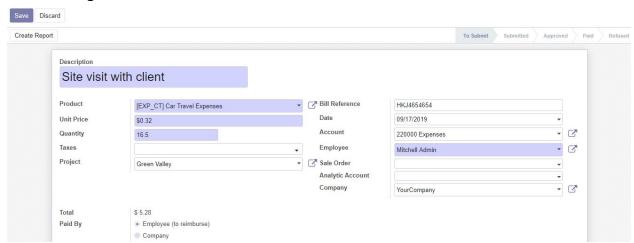# Odoo Construction Expense Management App

Prepared by

Pragmatic Techsoft Pvt. Ltd.

Pragmatic has developed a new module for the expense management related with projects. This will help companies to see and track the expenses made against the project. Managing expenses is one of the key features for any project and here in this module, Pragmatic has developed a way to do so.

After installing 'odoo_pragtech_expense', user will be able to see the following information while creating new records in Expense management.
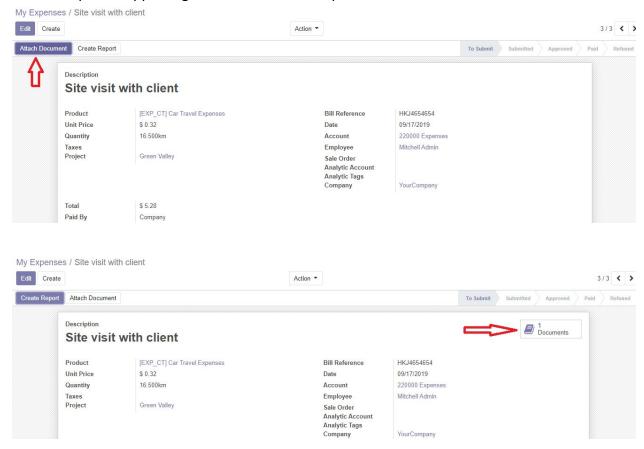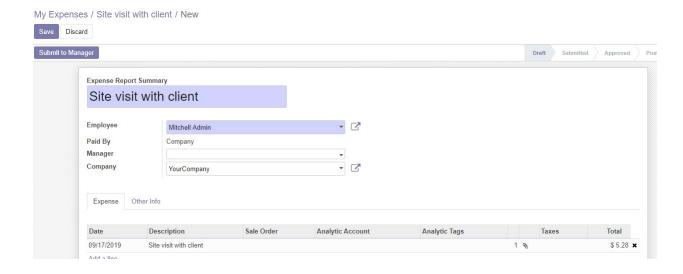

After Feeding Data

User can link this with project.
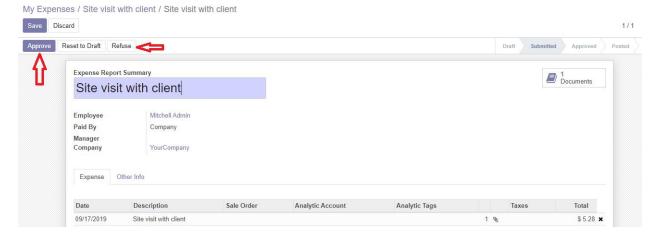In some cases, user can charge this reimbursement to the company

User can upload supporting documents for the expenses made.

User has to create report and add all lines in the expenses made, add notes and submit to manager for approval

Save Discard

Submit to Manager   Draft   Submitted   Approved   Post

Expense Report Summary
Site visit with client

Employee	Mitchell Admin
Paid By	Company
Manager	
Company	YourCompany

Expense   Other Info

Date	Description	Sale Order	Analytic Account	Analytic Tags		Taxes	Total
09/17/2019	Site visit with client				1		$ 5.28 ✕

Add a line

Manager has authority to either approve or refuse

Save Discard   1 / 1

Approve   Reset to Draft   Refuse   ⟵   Draft   Submitted   Approved   Posted

Expense Report Summary   📄 1 Documents
Site visit with client

Employee	Mitchell Admin
Paid By	Company
Manager	
Company	YourCompany

Expense   Other Info

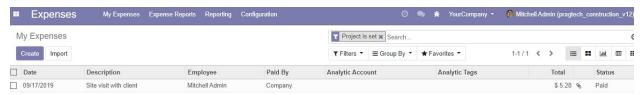| Date	Description	Sale Order	Analytic Account	Analytic Tags		Taxes	Total
09/17/2019	Site visit with client				1		$ 5.28 ✕

If its refused, employee will not get the benefit and if it's approved, then user can post the journal entries after approval from the respective manager.

Reporting
User can view the report of expense made against the project in different forms like list, kanban, graph and pivot

List View

	Expenses	My Expenses	Expense Reports	Reporting	Configuration				YourCompany ▾	Mitchell Admin (pragtech_construction_v12)

My Expenses   Project is set ✕ Search...

Create   Import   ▼ Filters ▾   ≡ Group By ▾   ★ Favorites ▾   1-1 / 1 ‹ ›

	Date	Description	Employee	Paid By	Analytic Account	Analytic Tags	Total	Status
☐	09/17/2019	Site visit with client	Mitchell Admin	Company			$ 5.28	Paid

Kanban View

My Expenses

Create Import

▼ Filters ▾   ≡ Group By ▾   ★ Favorites ▾   1-1 / 1 ‹ ›

Site visit with client	5.28
Mitchell Admin	Paid
09/17/2019	

Graph View

My Expenses

Project is set ✕ Search…

Measures ▾ 📊 📈 🥧

▼ Filters ▾   ≡ Group By ▾   📅 Time Ranges ▾   ★ Favorites ▾

● Grouped   ○ Stacked   ● Mitchell Admin

5.28
5.00

September 2019
■ Mitchell Admin 5.28

0.00

2019

Pivot View

My Expenses

Project is set ✕ Search…

Measures ▾ ⇄ ✛ ⬇

▼ Filters ▾   ≡ Group By ▾   📅 Time Ranges ▾   ★ Favorites ▾

	− Total	
	+ September 2019	
	Total	
− Total	5.28	
+ Mitchell Admin	5.28	