Odoo ERP System User Manual

Table of Contents

---

1. Introduction

This section provides an overview of Odoo, highlighting its purpose, primary features, and target users.

Example: Odoo ERP is designed to help businesses manage core operations such as finance, sales, human resources, and inventory through a unified interface. Key features include seamless accounting, CRM, sales management, and customizable modules for industry-specific needs.

---

2. System Requirements.

- **Operating System:** Windows Server 2016/2019, Ubuntu 18.04 or later

- **Processor:** Intel i5 or higher

- **Memory:** 8 GB RAM minimum, 16 GB recommended

- **Storage:** 2 GB available space for installation; additional space for databases

- **Additional Requirements:** Internet connection for updates

---

3. Installation Guide

Step-by-step instructions on how to install the Odoo ERP system.

1. Download the installer from the official Odoo website.

2. Run the setup file as an administrator.

3. Follow the on-screen instructions to complete the installation.

4. After installation, access Odoo by visiting your local server IP or the web-based interface.

---

4. Getting Started

Guidelines for initial setup after installation, including setting up an account and system configuration.

- Open Odoo in your browser by navigating to the local IP address.

- Log in using the default admin credentials or create a new admin account.

- Configure initial settings, such as the company profile, currency, and user roles.

---

5. Features Overview

- **Dashboard:** Provides a visual overview of your business's KPIs, financial reports, and workflow summaries.

- **Sales Management:** Manage quotes, orders, and customer interactions seamlessly.

- **Inventory:** Automate stock replenishment and track warehouse operations.

- **Integrations:** Connect Odoo with external apps like PayPal, Stripe, and QuickBooks.

---

6. User Interface Guide

- **Main Menu:** Access modules such as Sales, Accounting, Inventory, and CRM from the top navigation bar.

- **Sidebar:** View ongoing tasks or quickly switch between modules and reports.

- **Toolbar:** Create new documents, such as invoices or sales orders, with one click.

---

7. How to Perform Tasks

Task 1: Creating a New Module

1. From the Developer Mode, click on "Create New Module."

2. Define the module's name, purpose, and fields.

3. Set user permissions and assign the module to relevant users.

Task 2: Configuring a Sales Workflow

1. Navigate to the Sales module and click on "Configure Workflow."

2. Customize the stages, such as Quotation, Order Confirmation, and Invoicing.

3. Set automation rules for transitioning between stages.

Task 3: Managing Inventory

1. Go to the Inventory module and click "Manage Warehouse."

2. Set stock levels, reorder rules, and automate purchase orders.

3. Track items through the warehouse using barcode scanning.

---

8. Troubleshooting

Solutions to common issues in Odoo.

Example:

- **Issue:** Modules are not loading correctly. **Solution:** Ensure that Odoo is updated to the latest version and all necessary dependencies are installed.

---

9. FAQ

- **Q: How do I back up my Odoo database? A:** Navigate to the database management screen and click "Backup." You can download a copy of your database.

---

10. Contact Support

- **Email:** support@odoo.com

- **Phone:** +1 (800) 654-9876

- **Website:** www.odoo.com/support