



Savoir-faire
LINUX®



odoo
ICTC Training program

Versioning

Version	Date de version	Auteur / Contributeurs	Nature des modifications
2.0	2017-03-20	Carolandrea Guerrero Mickaël Brard Julien Jézéquel-Bréard	Initial diffusion
2.1	2017-05-26	Julien Jézéquel-Bréard	Minor modifications of content

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Inventory Management

Outcomes

- Manage multiple warehouses and locations,
- Create routes and picking waves ,
- Track items within kits and bundles at the product level,
- Control inventory across sales channels (receiving, issuing, and moving of stock),
- Planning and replenishment products.

Inventory Strategies

Supply Chain & Inventory Strategies

1. Product / Material & Transport	2. Warehouse Operations	3. Warehouse Optimization	4. Logistics Performance
<ul style="list-style-type: none">→ Inventory Levels / Valuation Methods→ Stocks Methods→ Procurement Strategy→ Distribution Networking Planning→ Return Management	<ul style="list-style-type: none">→ Delivery Order→ Raw material to manufacture→ Incoming Shipments	<ul style="list-style-type: none">→ Lean Warehousing→ Wave Management→ Location Management→ Sub-Assembly and Kitting Zones→ Cross-Docking→ Labor Outsourcing→ Reverse Logistics / Back-Haul	<ul style="list-style-type: none">→ Supplier Evaluation→ Optimal Supply Chain→ Reducing delivery time→ Reducing storage→ Optimize Distribution costs→ Optimize workforce costs→ Optimize quality→ Optimize facilities & equipment

odoo Inventory



Warehouse Management



Location Management



Picking & Packing



Shipping Operations

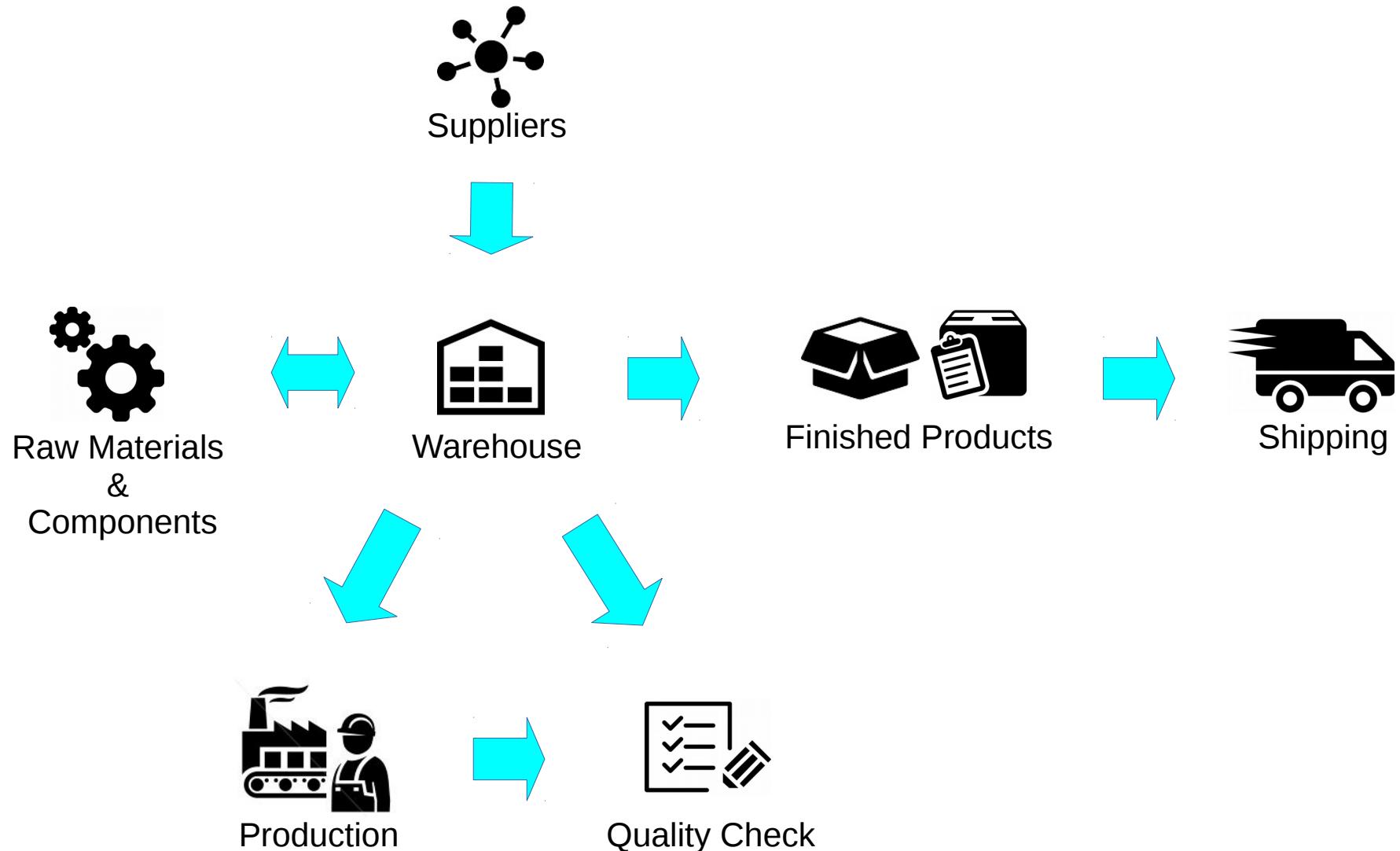


Inventory Management



Bar code System

Inventory – Process Overview



Inventory – Stock Allocation strategy



→ **Equal Stock Allocation** – Each sales channel will have same stock quantity.
On 1 000 items available in stock : 250 will be dedicated for each above channel

→ **Trend Stock Allocation** – It is based on sales numbers of each sales channel.
Sales repartition : In-store : 25 % - E-commerce : 60 % - B2B : 15%.

For 1000 items in stock :

In-store dedicated stock : 250

E-commerce : 600

B2B : 150

→ **Universal Stock Allocation** – A single stock for all sales channel.

Inventory – Stock Allocation

Allocated item definition : **Inventory item** not yet withdrawn from the storage but reserved for a specific purpose, and therefore unavailable for other purposes.*

Not to confuse with the allocation strategy. This correspond to the daily stock management.

Example : For a sale or a manufacturing operation, your item might be physically in stock, but not longer available, since it has been reserved by ERP users for its operation.

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Internal logistics

Warehouse Process – Operations Type

1 Receiving

- Schedule carrier
- Unload Vehicle
- Inspect for damage

2 Put - away

- Identify Product
- Identify Product Location
- Move products
- Update records

3 Storage

- Equipment
- Stock Location

4 Order Picking

- Information
- Walk & Pick
- Batch Picking

5 Shipping Preparation

- Packing
- Labeling
- Stacking

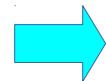
6 Shipping

- Schedule Carrier
- Load vehicle
- Bill of Loading
- Record Update

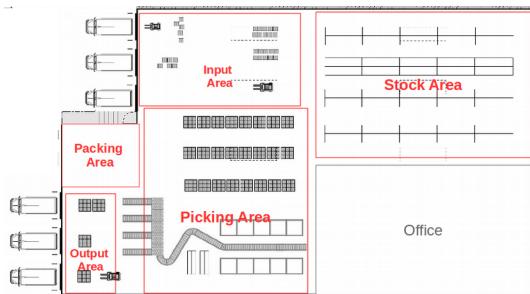
Warehouse vs. Location



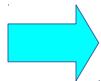
Warehouse



It is a building or place in which items are stocked.



Location



It is a specific space within the warehouse.

There are 3 types of locations :

- **Physical Location** – Internal location that is part of the warehouse. It can be the loading and unloading area, a shelf or a department, etc.

- **Partner Location** – Space within a customer and/or vendor's warehouse. You are not the owner of the warehouse.

- **Virtual Location** – The place does not physically exist, but in which products can be placed while they are not physically in an inventory yet (Procurements), Inventory loss, Scrap location.

Exercise : Settings Warehouse

Canadian Colors would like to transfer the set of brushes to its point of sales « Color Stores ». Before, they must register the Color Stores as warehouses.

Warehouse Name	Short Name
WH Color Store #1	WHCS1
WH Color Store #2	WHCS2
WH Color Store #3	WHCS3
WH Color Store #4	WHCS4
WH Color Store #5	WHCS5
WH Color Store #6	WHCS6

TO DO

- Select manage several Warehouses with several stock locations option in settings inventory module.
- Create warehouses.

odoo Inventory – Locations & Warehouses

Settings ➤ Location & Warehouse ➤ Manage several Warehouses, each one composed by several stock locations

The screenshot shows the Odoo Inventory settings interface. At the top, there are tabs for Dashboard, Operations, Inventory Control, Schedulers, Reports, and Configuration. Below the tabs, there are two buttons: 'APPLY' (green) and 'CANCEL' (grey). The main content area is divided into sections:

- Traceability**:
 - Lots and Serial Numbers: Do not track individual product items Track lots or serial numbers
 - Expiration Dates: Do not use Expiration Date on serial numbers Define Expiration Date on serial numbers
 - Packages: Do not manage packaging Record packages used on packing: pallets, boxes, ...
 - Product Owners: All products in your warehouse belong to your company Manage consignee stocks (advanced)
 - Barcode Interface: Barcode scanner support [More Info](#)
- Stock Accounting**:
 - Landed Costs: No landed costs Include landed costs in product costing computation
 - Inventory Valuation: Periodic inventory valuation (recommended) Perpetual inventory valuation (stock move generates accounting entries)
- Shipping Connectors**:
 - Carriers: DHL integration FedEx integration Temando integration UPS integration USPS integration
- Location & Warehouse**:
 - Procurements: Reserve products immediately after the sale order confirmation Reserve products manually or based on automatic scheduler
 - Warehouses and Locations usage level: Manage only 1 Warehouse with only 1 stock location Manage only 1 Warehouse, composed by several stock locations Manage several Warehouses, each one composed by several stock locations
 - Routes: No automatic routing of products Advanced routing of products using rules
 - Dropshipping: Suppliers always deliver to your warehouse(s) Allow suppliers to deliver directly to your customers
 - Picking Waves: Manage pickings one at a time Manage picking in batch per worker
 - Minimum Stock Rules: Set lead times in calendar days (easy) Set lead times in working days (faster)

odoo Inventory – Settings Warehouses

The screenshot shows the Odoo Inventory interface. In the top navigation bar, the 'Inventory' module is selected. Below it, the 'Warehouses' section is visible, featuring a 'CREATE' button highlighted with a red box. A dropdown menu is open over the 'CREATE' button, showing several options: 'Settings', 'Warehouse Management', and 'Warehouses'. The 'Warehouses' option is also highlighted with a red box. To the right of the dropdown, there is a search bar and a table with one row showing 'Canadian Colors Inc' under 'Address'. At the bottom of the screen, a large gray area is partially visible.

The screenshot shows the 'Warehouses / New' creation form. The top navigation bar is identical to the previous screenshot. The main form has a title 'Warehouses / New'. It contains fields for 'Warehouse Name' (set to 'WH Color Store #1'), 'Short Name' (set to 'WHCST1'), 'Address' (set to 'Canadian Colors Inc'), and status indicators for 'Active' (checked) and 'Routes' (unchecked). Below the form, there is a large gray area.

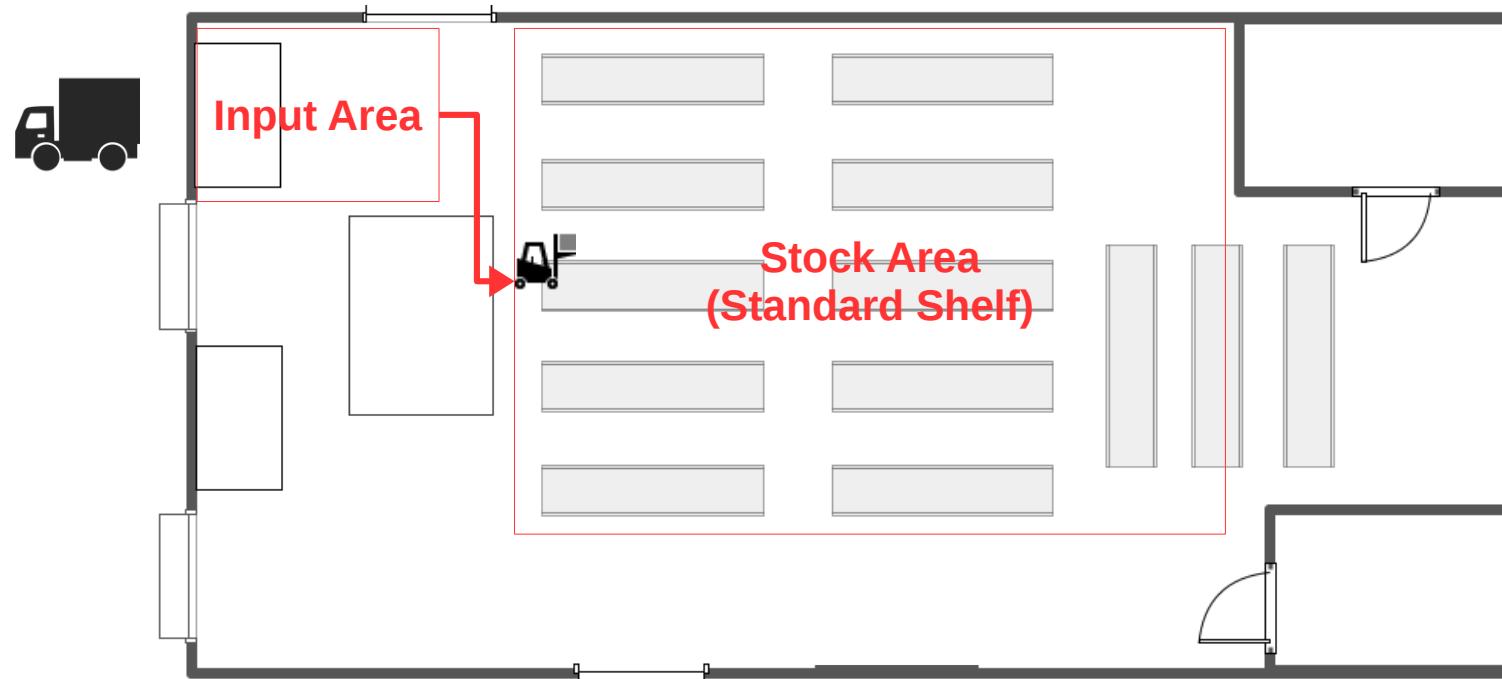
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Inbound logistics

Incoming Shipments

1

Receipt & Stock

- One step – Receive products directly in stock. Companies having small warehouse which does not require a high stock of items or does not sell perishable items. For example, according to the product type, the stock could be the standard type of storage or the floor storage.



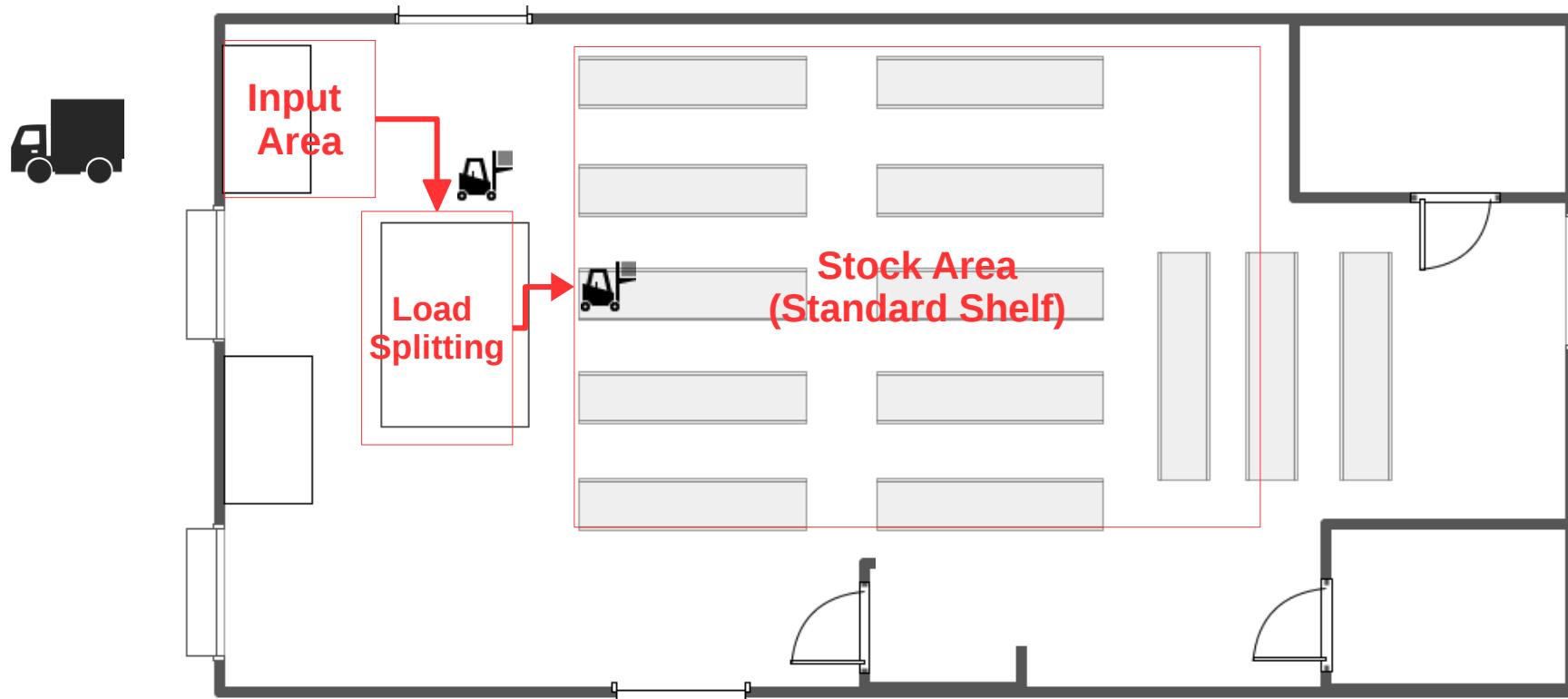
Incoming Shipments

2

Load Splitting

Stock

- Two steps – Unload products in input location before going to stock. Screening and sorting processes before going to stock.

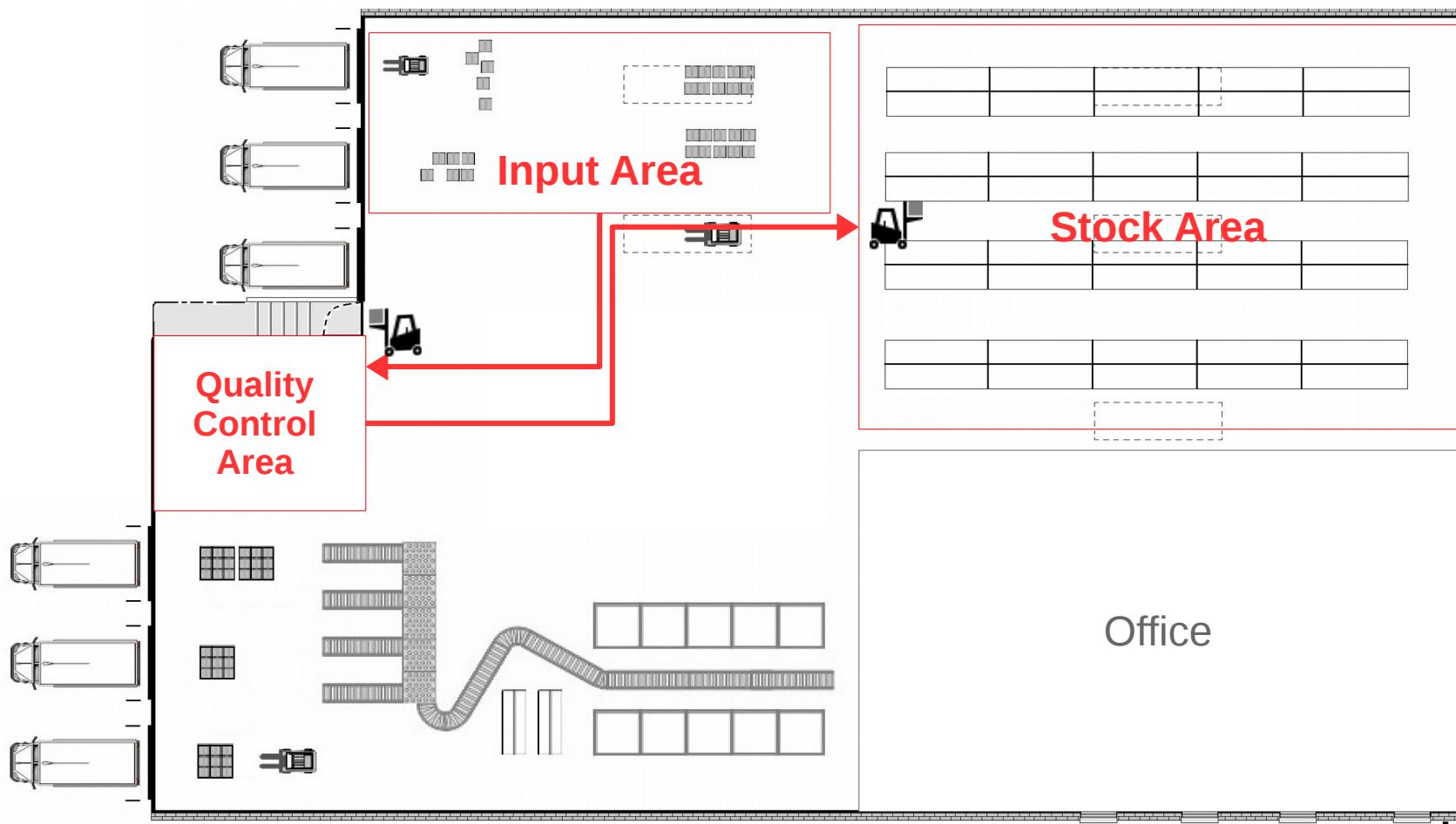


Incoming Shipments

3

Unload Quality Control Stock

- Three steps – Unload in input location, go through a quality control before being admitted in stock.



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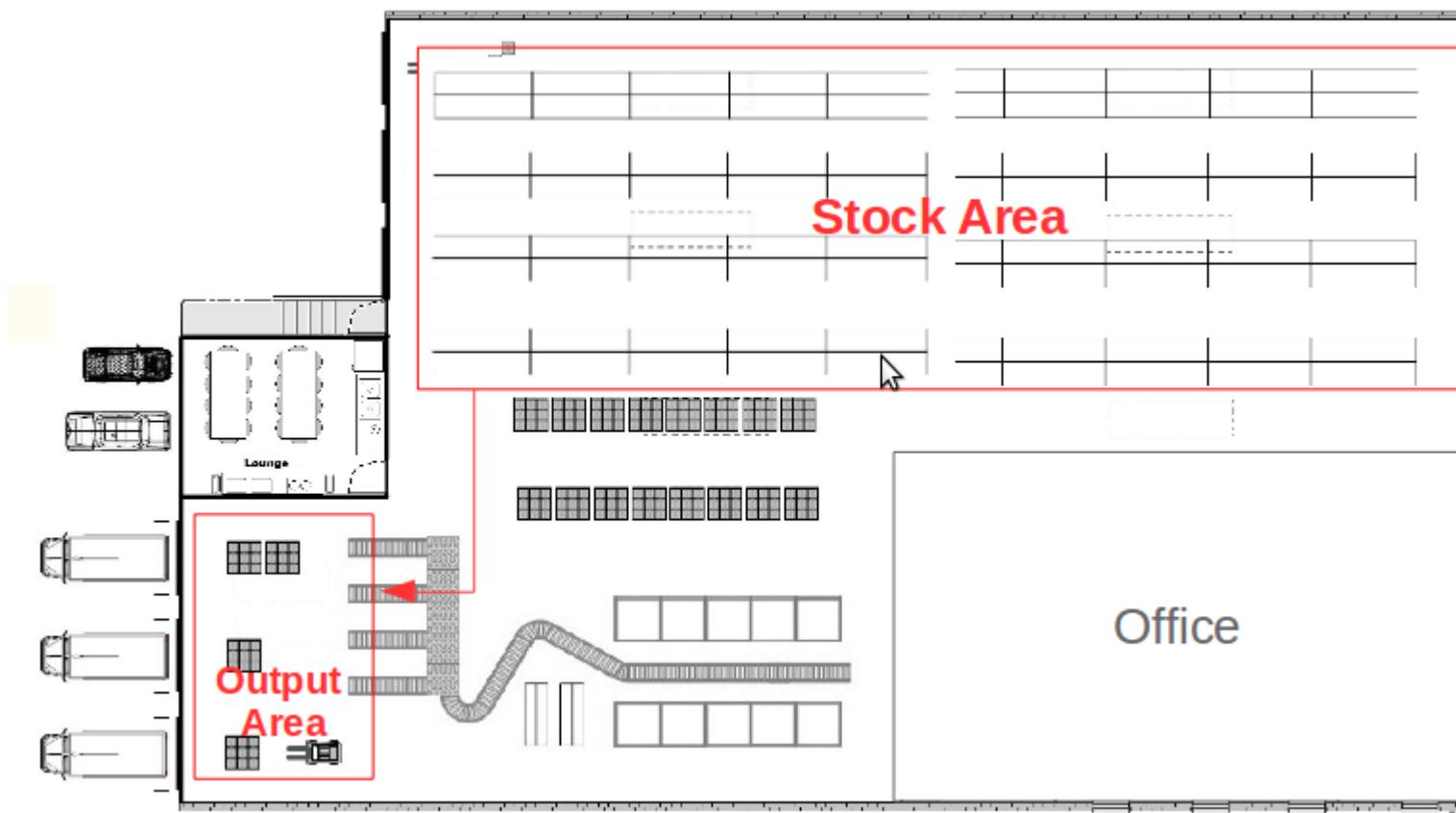
Outbound logistics

Outgoing Shipments

1

Shipping

- One step – Ship directly from stock (ship only). No packing or picking area.



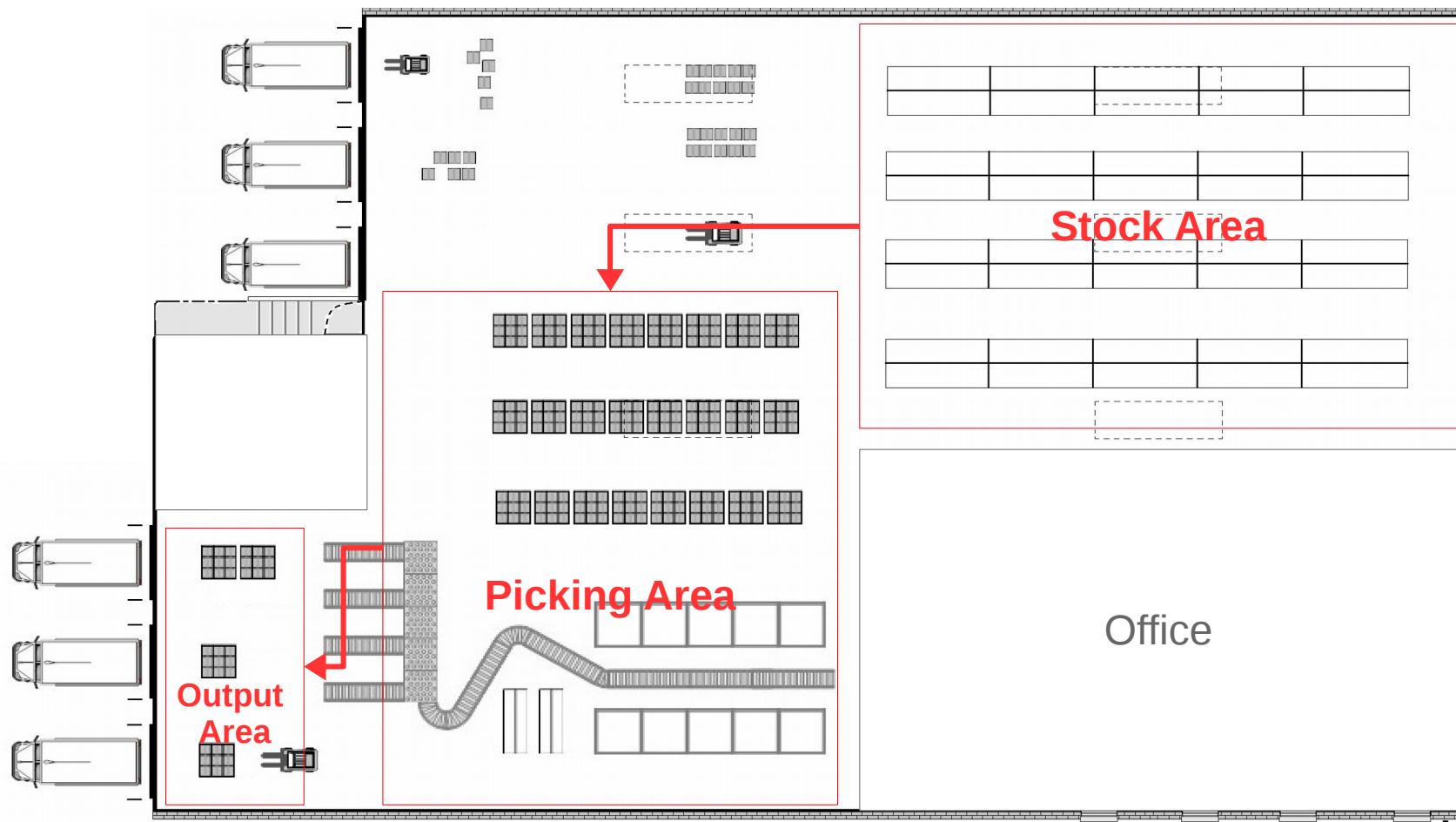
Outgoing Shipments

2

Pick

Ship

- Two steps – Bring goods to output location before shipping. Inventory methods such as FIFO, LIFO, and FEFO require having at least two steps to handle a shipment.



Outgoing Shippings

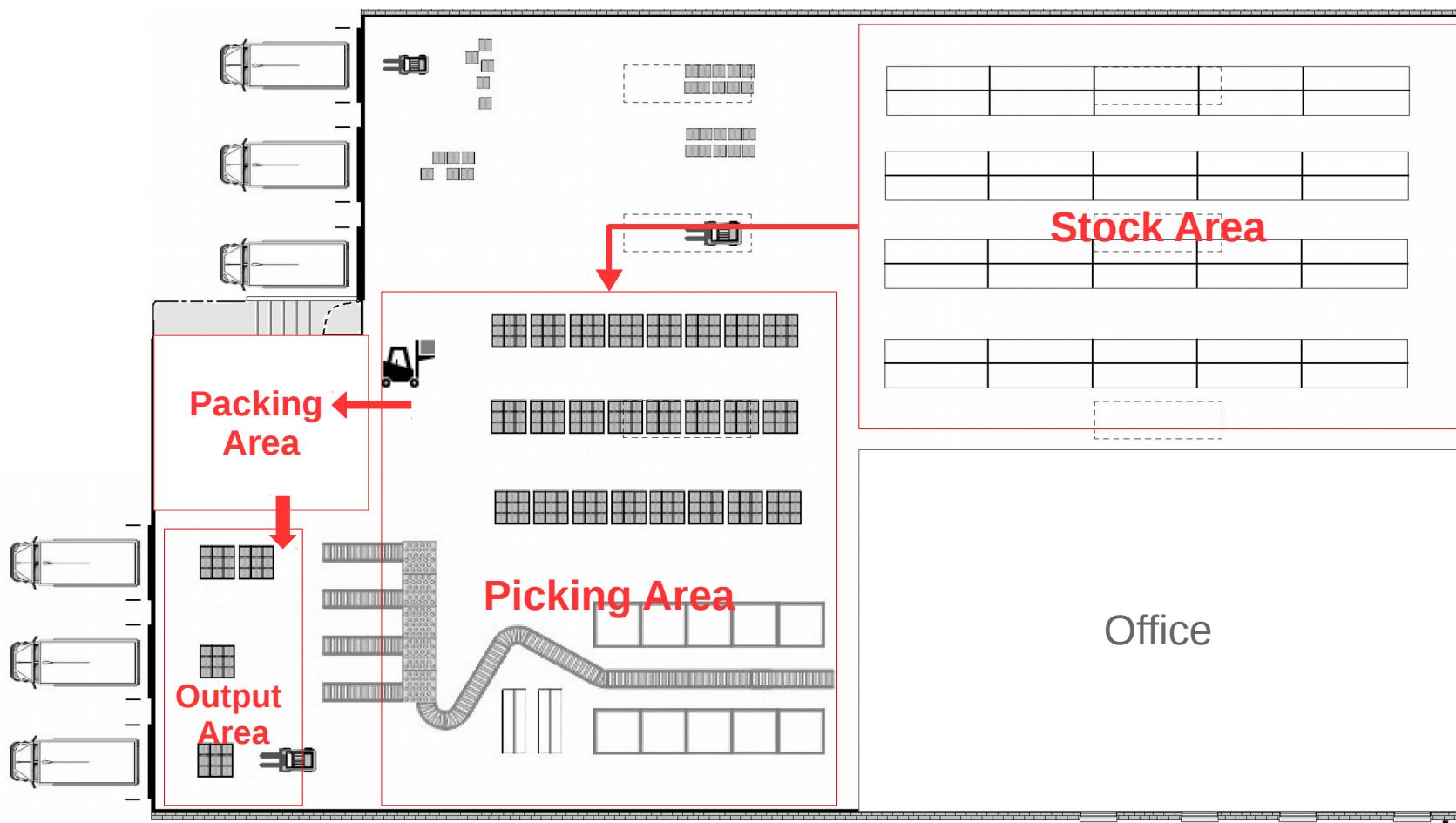
3

Pick

Pack

Ship

- Three steps – Make packages into a dedicated location, then bring them to the output location. Mainly used for handling very large stocks.



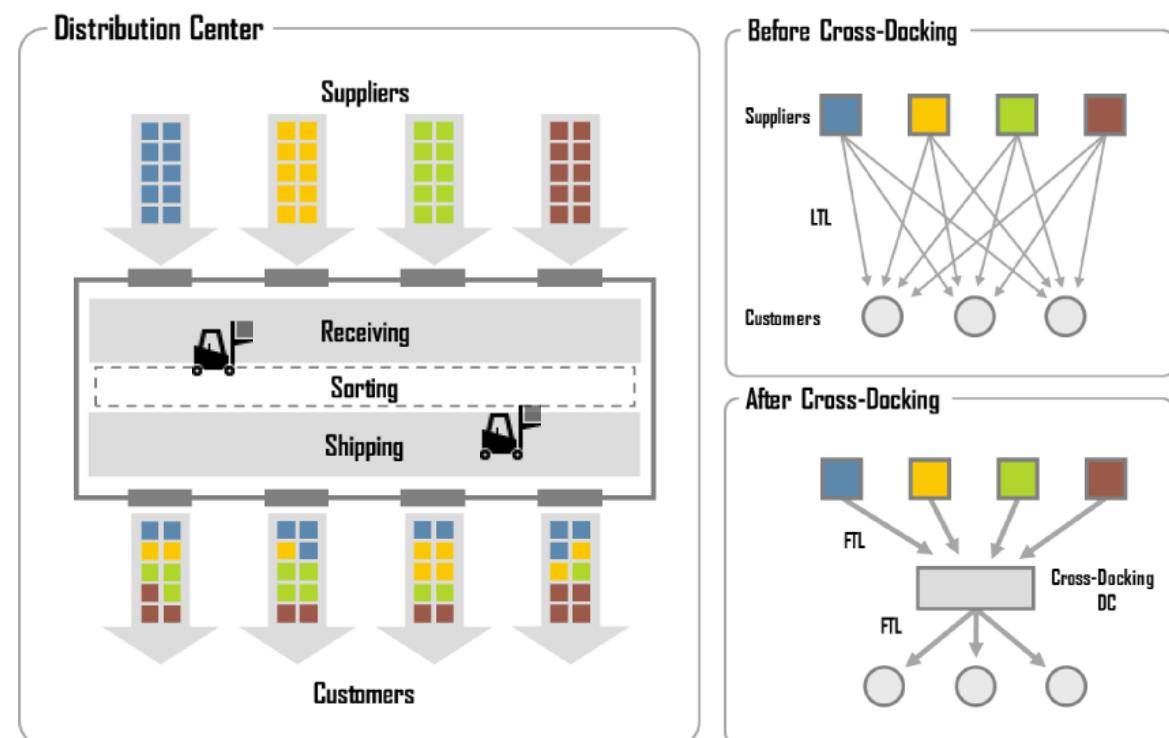
Special model : Cross-Docking

Receiving Sorting Shipping

Interface between 2 Warehouses or Business units. Products enter and exit the platform in a sequence of operation, without stock entry.

Cross docking manages products with docking area where product directly pass from supplier location to customer delivery through the platform. Allows using fully loaded trucks. Used in retail logistic.

Order items by weight,
size, quantity, and
location



odoo Inventory – Location Configuration

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration

Location & Warehouse

Procurements

- Reserve products immediately after the sale order confirmation
- Reserve products manually or based on automatic scheduler

Warehouses and Locations usage level

- Manage only 1 Warehouse with only 1 stock location
- Manage only 1 Warehouse, composed by several stock locations
- Manage several Warehouses, each one composed by several stock locations

Routes

- No automatic routing of products
- Advanced routing of products using rules

Dropshipping

Minimum days to trigger a propagation of date change in pushed/pull flows. 0

- Suppliers always deliver to your warehouse(s)
- Allow suppliers to deliver directly to your customers

Picking Waves

- Manage pickings one at a time
- Manage picking in batch per worker

Minimum Stock Rules

- Set lead times in calendar days (easy)
- Adapt lead times using the suppliers' open days calendars (advanced)

Warning

- All the partners can be used in pickings
- An informative or blocking warning can be set on a partner

odoo Inventory – Warehouse Configuration

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration Active Routes

Warehouses / WH Color Store #1

SAVE DISCARD 2 / 4

Warehouse Name: WH Color Store #1

Short Name: WHCS1 Company: Canadian Colors Inc

WAREHOUSE CONFIGURATION

Incoming Shipments:

- Receive goods directly in stock (1 step)
- Unload in input location then go to stock (2 steps)
- Unload in input location, go through a quality control before being admitted in stock (3 steps)

Outgoing Shipments:

- Ship directly from stock (Ship only)
- Bring goods to output location before shipping (Pick + Ship)
- Make packages into a dedicated location, then bring them to the output location for shipping (Pick + Pack + Ship)

Manufacture in this Warehouse:

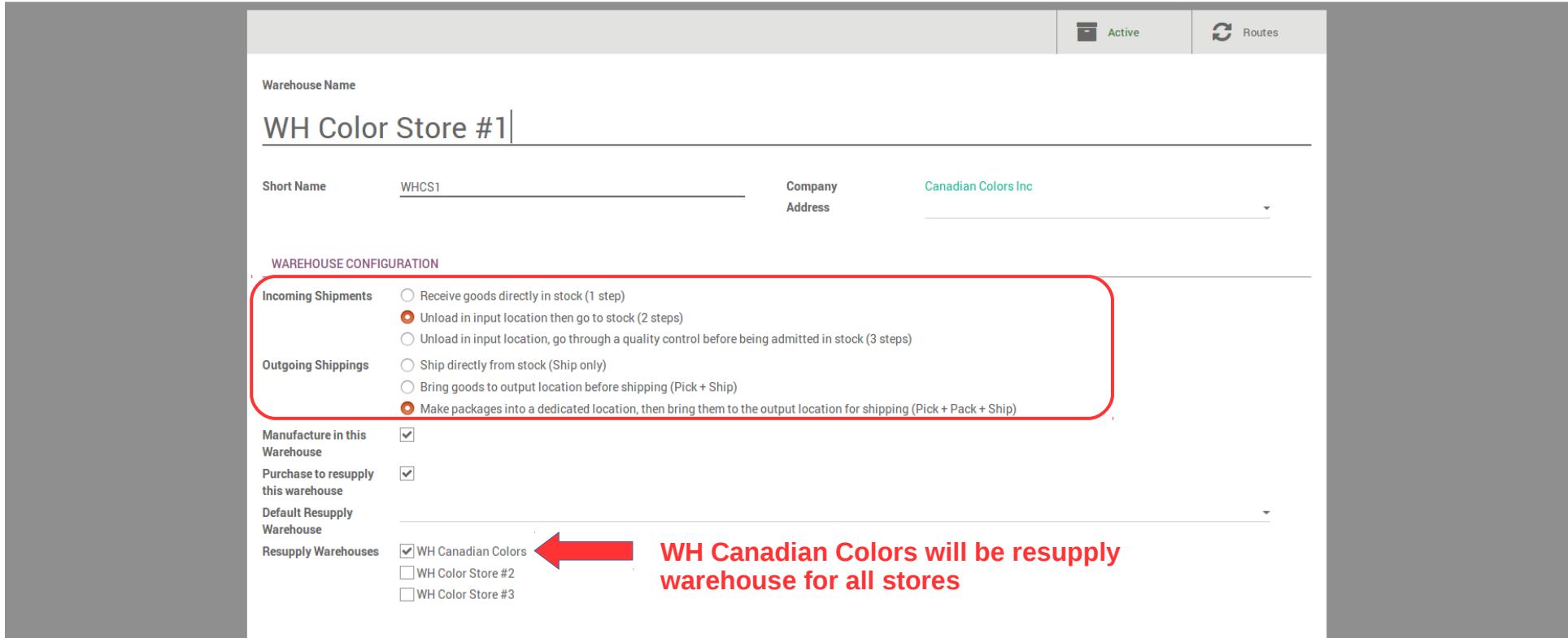
Purchase to resupply this warehouse:

Default Resupply Warehouse:

Resupply Warehouses:

- WH Canadian Colors
- WH Color Store #2
- WH Color Store #3

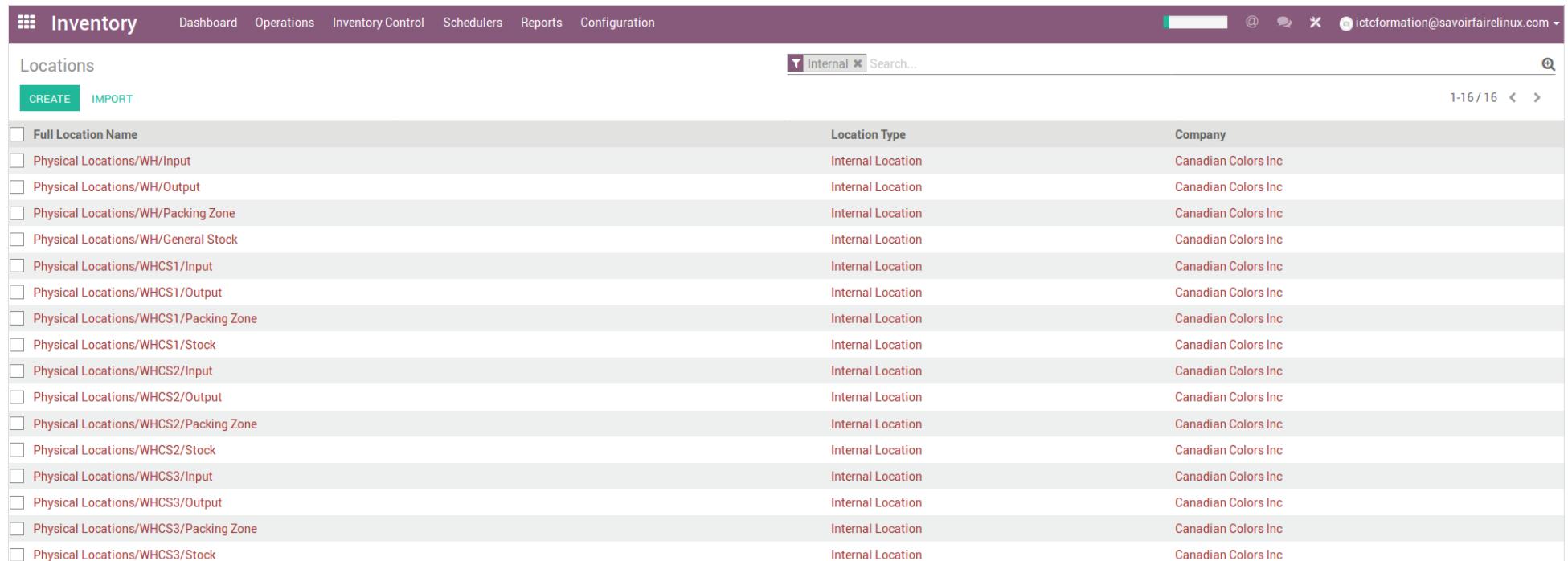
WH Canadian Colors will be resupply warehouse for all stores



According to Incoming Shipment and Outcoming Shipping selection, the system creates the warehouse locations and operations types in the system by default.

odoo Inventory – Location Configuration

Warehouse locations by default :



The screenshot shows the Odoo Inventory Locations configuration screen. The top navigation bar includes links for Dashboard, Operations, Inventory Control, Schedulers, Reports, and Configuration. The main title is "Locations". Below the title, there are "CREATE" and "IMPORT" buttons. A search bar contains the text "Internal". The main content area displays a table of warehouse locations:

Full Location Name	Location Type	Company
Physical Locations/WH/Input	Internal Location	Canadian Colors Inc
Physical Locations/WH/Output	Internal Location	Canadian Colors Inc
Physical Locations/WH/Packing Zone	Internal Location	Canadian Colors Inc
Physical Locations/WH/General Stock	Internal Location	Canadian Colors Inc
Physical Locations/WHCS1/Input	Internal Location	Canadian Colors Inc
Physical Locations/WHCS1/Output	Internal Location	Canadian Colors Inc
Physical Locations/WHCS1/Packing Zone	Internal Location	Canadian Colors Inc
Physical Locations/WHCS1/Stock	Internal Location	Canadian Colors Inc
Physical Locations/WHCS2/Input	Internal Location	Canadian Colors Inc
Physical Locations/WHCS2/Output	Internal Location	Canadian Colors Inc
Physical Locations/WHCS2/Packing Zone	Internal Location	Canadian Colors Inc
Physical Locations/WHCS2/Stock	Internal Location	Canadian Colors Inc
Physical Locations/WHCS3/Input	Internal Location	Canadian Colors Inc
Physical Locations/WHCS3/Output	Internal Location	Canadian Colors Inc
Physical Locations/WHCS3/Packing Zone	Internal Location	Canadian Colors Inc
Physical Locations/WHCS3/Stock	Internal Location	Canadian Colors Inc

odoo Inventory – Operations Types

Operations Types by default :

Inventory			
All Operations		Search...	
CREATE IMPORT			
<input type="checkbox"/>	Picking Type Name	Warehouse	Reference Sequence
<input type="checkbox"/>	+ Receipts	WH Canadian Colors	edu-ictcSequence in
<input type="checkbox"/>	+ Internal Transfers	WH Canadian Colors	edu-ictcSequence internal
<input type="checkbox"/>	+ Pick	WH Canadian Colors	edu-ictcSequence picking
<input type="checkbox"/>	+ Pack	WH Canadian Colors	edu-ictcSequence packing
<input type="checkbox"/>	+ Delivery Orders	WH Canadian Colors	edu-ictcSequence out
<input type="checkbox"/>	+ Manufacturing	WH Canadian Colors	Production order
<input type="checkbox"/>	+ Receipts	WH Color Store #1	WH Color Store #1Sequence in
<input type="checkbox"/>	+ Internal Transfers	WH Color Store #1	WH Color Store #1Sequence internal
<input type="checkbox"/>	+ Pick	WH Color Store #1	WH Color Store #1Sequence picking
<input type="checkbox"/>	+ Pack	WH Color Store #1	WH Color Store #1Sequence packing
<input type="checkbox"/>	+ Delivery Orders	WH Color Store #1	WH Color Store #1Sequence out
<input type="checkbox"/>	+ Manufacturing	WH Color Store #1	Production order
<input type="checkbox"/>	+ Receipts	WH Color Store #2	WH Color Store #2Sequence in
<input type="checkbox"/>	+ Internal Transfers	WH Color Store #2	WH Color Store #2Sequence internal
<input type="checkbox"/>	+ Pick	WH Color Store #2	WH Color Store #2Sequence picking
<input type="checkbox"/>	+ Pack	WH Color Store #2	WH Color Store #2Sequence packing
<input type="checkbox"/>	+ Delivery Orders	WH Color Store #2	WH Color Store #2Sequence out
<input type="checkbox"/>	+ Manufacturing	WH Color Store #2	Production order
<input type="checkbox"/>	+ Receipts	WH Color Store #3	WH Color Store #3Sequence in
<input type="checkbox"/>	+ Internal Transfers	WH Color Store #3	WH Color Store #3Sequence internal
<input type="checkbox"/>	+ Pick	WH Color Store #3	WH Color Store #3Sequence picking
<input type="checkbox"/>	+ Pack	WH Color Store #3	WH Color Store #3Sequence packing
<input type="checkbox"/>	+ Delivery Orders	WH Color Store #3	WH Color Store #3Sequence out
<input type="checkbox"/>	+ Manufacturing	WH Color Store #3	Production order

Exercise : Warehouse Configuration

TO DO

- According to the warehouse layout (WH Canadian Colors), set up the incoming shipments in 2 steps (unload in input location before going to stock) and the outgoing Shippings in 3 steps (Pick + Pack + Ship).
- For stores, set up the product reception directly in stock and the outgoing Shippings in 2 steps (Pick + Ship).
- The warehouse (WH Canadian Colors) will be the resupply warehouse for stores.

Exercise : Delivery Orders (pick + pack + ship)

TO DO

- Take « Paintcolor » customer and create a sales order of 200 units of any product.
- For this customer, edit two (2) delivery addresses (Only Ontario). 100 units of the product will be delivered for each destination.
- Make the delivery taking the following flow of stock moves between locations :

WH/Stock  **WH/Packing Zone**  **WH/Output**  **Final Destination**

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Logistics Strategies

Exercise : Locations & Logistic Strategies

Canadian Colors wants to set up its logistic strategies only for its main warehouse (Physical Locations/WH/Stock). To do this, you must consider the following information :

- The company has divided its stock according to the type of product :

Product Category	Description	Warehouse Storage (Put Away Strategy)	Location Name	Parent Location
Adhesives	Product with standard box packaging	Standard Shelf	General Stock	WH
Paints				
Agrochemicals				
Professional tools	High rotation small product	Mezzanine	Mezzanine Stock	WH

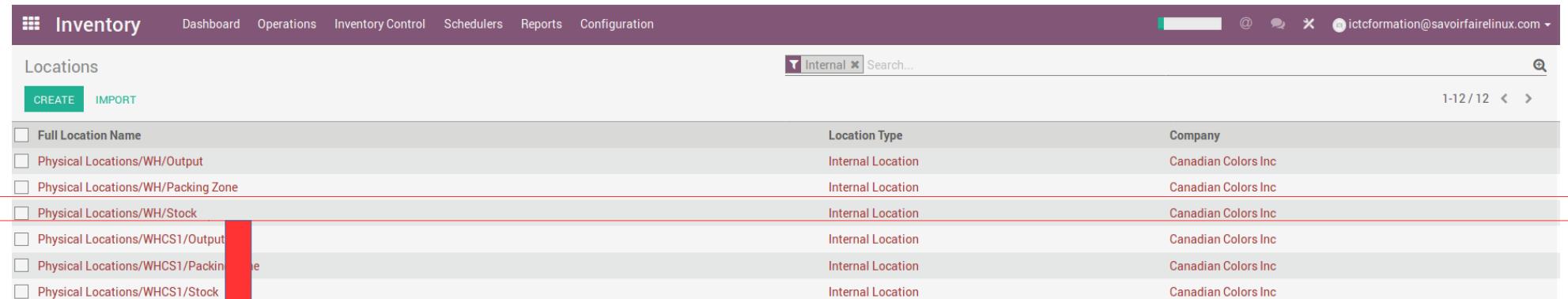
- As Removal Strategy, the FIFO accounting will be the method chosen by the company to manage warehouses, inventory, and stock.

Exercise : Locations & Logistic Strategies

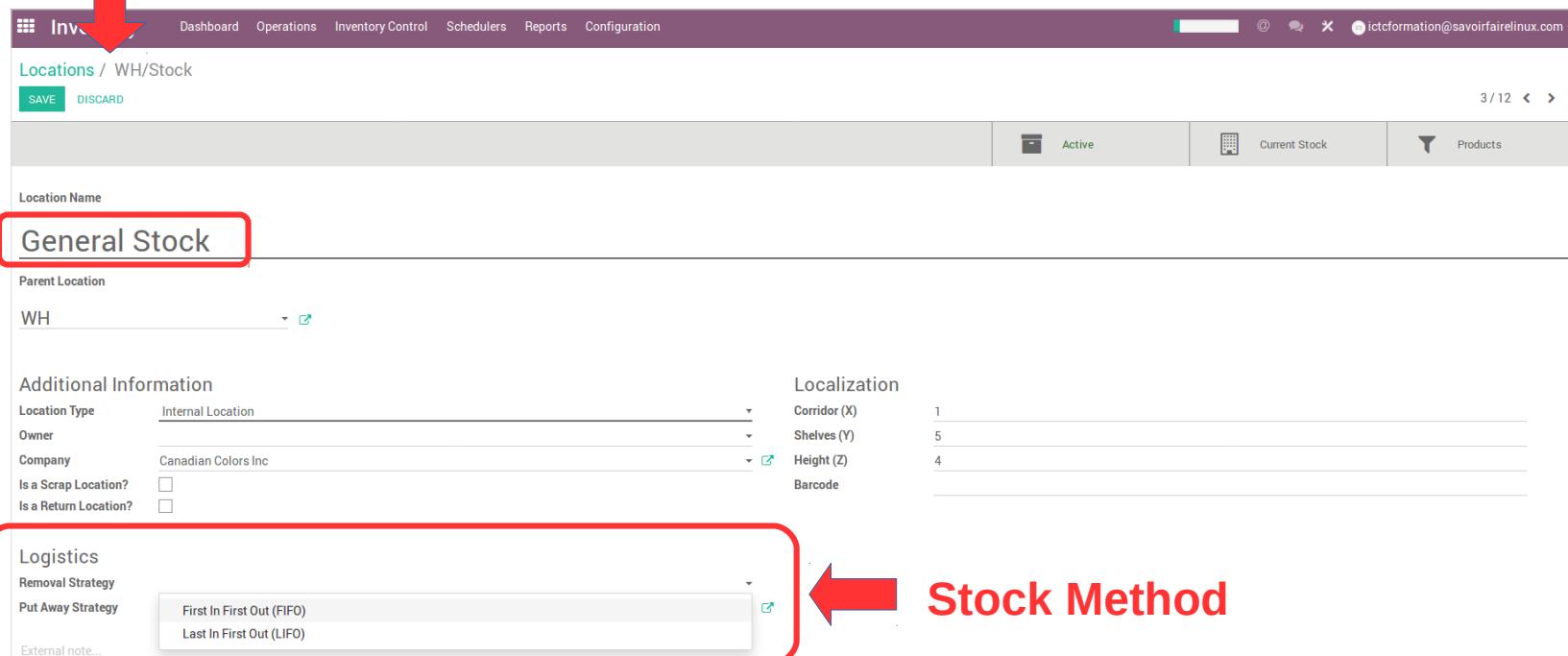
TO DO

- Take in « Locations » - Physical Locations/WH/Stock – and change the location name as « General Stock ».
- According to the information above, set the Removal and Put-away Strategies for this location.
- Create the Location « Mezzanine » and set the logistics strategies for this location as well.

odoo Inventory - Location & Logistics Strategies



	Location Type	Company
<input type="checkbox"/> Full Location Name		
<input type="checkbox"/> Physical Locations/WH/Output	Internal Location	Canadian Colors Inc
<input type="checkbox"/> Physical Locations/WH/Packing Zone	Internal Location	Canadian Colors Inc
<input checked="" type="checkbox"/> Physical Locations/WH/Stock	Internal Location	Canadian Colors Inc
<input type="checkbox"/> Physical Locations/WHCS1/Output	Internal Location	Canadian Colors Inc
<input type="checkbox"/> Physical Locations/WHCS1/Packing Zone	Internal Location	Canadian Colors Inc
<input type="checkbox"/> Physical Locations/WHCS1/Stock	Internal Location	Canadian Colors Inc



Inventory

Dashboard Operations Inventory Control Schedulers Reports Configuration

Internal Search...

CREATE IMPORT

1-12 / 12

Location Name	Parent Location	Localization
General Stock	WH	Corridor (X): 1 Shelves (Y): 5 Height (Z): 4

SAVE DISCARD

3 / 12

Locations / WH/Stock

General Stock

Parent Location: WH

Additional Information

Location Type: Internal Location

Owner: Canadian Colors Inc

Company: Canadian Colors Inc

Is a Scrap Location?

Is a Return Location?

Logistics

Removal Strategy: First In First Out (FIFO)

Put Away Strategy: Last In First Out (LIFO)

External note:

Stock Method

odoo Inventory – Location & Logistics Strategies

Locations / WH/Mezzanine Stock

SAVE **DISCARD** Create the new location and fill out informations

Location Name
Mezzanine Stock

Parent Location
WH

Additional Information

Location Type	Internal Location	Localization
Owner		Corridor (X) 0
Company	edu-Inventory Management	Shelves (Y) 0
Is a Scrap Location?	<input type="checkbox"/>	Height (Z) 0
Is a Return Location?	<input type="checkbox"/>	Barcode

Logistics

Removal Strategy	First In First Out (FIFO)	
Put Away Strategy	Mezzanine	Clic to edit and modify Put Away Strategy details 

odoo Inventory – Location & Logistics Strategies

Open: Put Away Strategy ×

Name	Standard Shelf
Method	Fixed Location

Fixed Locations Per Categories

Product Category	Location	
All / Agrochemicals	WH/General Stock	
All / Adhesives	WH/General Stock	
All / Paints	WH/General Stock	

[Add an item](#)

SAVE [DISCARD](#)

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Inter-warehouse transfers

Exercise : Inter-warehouse transfers

Canadian Colors wants to transfer the set of brushes to its point of sales « Color Stores ».

According to the following distribution rules:

	Inventory transfer	Source Location	Final Destination
Color Store #1	10	WH/Mezzanine Stock	WHCS1/Stock
Color Store #2	40	WH/Mezzanine Stock	WHCS2/Stock
Color Store #3	70	WH/Mezzanine Stock	WHCS3/Stock
Color Store #4	50	WH/Mezzanine Stock	WHCS4/Stock
Color Store #5	60	WH/Mezzanine Stock	WHCS5/Stock
Color Store #6	60	WH/Mezzanine Stock	WHCS6/Stock
Total	290		

- Create *internal transfers per store*. From the dashboard, select an *internal movement* of one of the two warehouses. The route to apply :

WH/General Stock → WH/Output → WHCS1/Input → WHCS1/Stock

- Pay attention taking the physical locations by the warehouse to make the transfers.

odoo Internal Transfers (Mezzanine - Output)

The screenshot shows the Odoo Internal Transfers interface. At the top left, there's a sidebar with 'Internal Transfers' and 'WH Canadian Colors'. Below it are buttons for 'View', 'New', 'All', 'Ready', 'Waiting', and 'Transfer' (which is highlighted with a red box). To the right is a 'More' dropdown. At the bottom are color swatches and a 'Settings' link.

The main area has a header with 'Inventory', 'Dashboard', 'Operations', 'Inventory Control', 'Schedulers', 'Reports', and 'Configuration'. On the right, there's a user icon and an email address: ictformation@savoirfairelinux.com.

The main form is titled 'Inventory / New'. It has buttons for 'SAVE', 'DISCARD', 'MARK AS TODO', 'VALIDATE', and 'CANCEL'. Above the form, there are status indicators: DRAFT, WAITING AVAILABILITY, PARTIALLY AVAILABLE, AVAILABLE, and DONE. A red arrow points from the 'Transfer' button in the sidebar up to the 'MARK AS TODO' button in the form.

The form itself has fields for 'Source Location Zone' (WH/Mezzanine Stock), 'Destination Location Zone' (WH/Output), 'Scheduled Date' (03/15/2017 18:47:58), and 'Source Document' (e.g. P00032). Below these are tabs for 'INITIAL DEMAND' and 'ADDITIONAL INFO'. Under 'INITIAL DEMAND', there's a table with columns: Product, Quantity, Unit of Measure, and Status. A row for 'Painting Scraper Set 1' has a quantity of 290.000, unit 'Unit', and status 'New'. A red box highlights this row. There's also a 'Add an item' button and a note about adding internal notes.

- If you select **Validate**, Odoo will process all quantities to transfer.
- If you select **Mark as TODO**, Odoo will put the transfer in **Waiting Availability** status. Click on **Reserve** to reserve a number of products in your source warehouse.

odoo Inventory – Stock Moves

The screenshot shows the Odoo Inventory module's Stock Moves list view. The top navigation bar includes links for Dashboard, Operations, Inventory Control, Schedulers, Reports, and Configuration. The main title is "Stock Moves". A red arrow points to the "Stock Moves" tab in the navigation bar. A red box highlights the last four rows of the list view, which show stock moves from "WH/INT/00007" to "WH/Mezzanine Stock" with quantity 290.000.

Stock Moves						
Inventory Valuation			Search...			
Stock Moves			1-80 / 82			
Procurement Exceptions						
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00002	Painting Scraper #4	10.000	Unit	WH/General Stock	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00002	Painting Scraper #5	10.000	Unit	WH/General Stock	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00004	Painting Scraper #1	40.000	Unit	WH/General Stock	WHCS2/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00004	Painting Scraper #2	40.000	Unit	WH/General Stock	WHCS2/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00004	Painting Scraper #3	40.000	Unit	WH/General Stock	WHCS2/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00004	Painting Scraper #4	40.000	Unit	WH/General Stock	WHCS2/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00004	Painting Scraper #5	40.000	Unit	WH/General Stock	WHCS2/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00005	Painting Scraper #1	10.000	Unit	WH/General Stock	WHCS1
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00005	Painting Scraper #2	10.000	Unit	WH/General Stock	WHCS1
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00005	Painting Scraper #3	10.000	Unit	WH/General Stock	WHCS1
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00005	Painting Scraper #4	10.000	Unit	WH/General Stock	WHCS1
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00005	Painting Scraper #5	10.000	Unit	WH/General Stock	WHCS1
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00006	Painting Scraper #1	10.000	Unit	WH/General Stock	WHCS1/Input
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00006	Painting Scraper #2	10.000	Unit	WH/General Stock	WHCS1/Input
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00006	Painting Scraper #3	10.000	Unit	WH/General Stock	WHCS1/Input
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00006	Painting Scraper #4	10.000	Unit	WH/General Stock	WHCS1/Input
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00006	Painting Scraper #5	10.000	Unit	WH/General Stock	WHCS1/Input
<input type="checkbox"/> Painting Scraper Set 1	WHCS1/INT/00001	Painting Scraper #1	10.000	Unit	WHCS1/Input	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WHCS1/INT/00001	Painting Scraper #2	10.000	Unit	WHCS1/Input	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WHCS1/INT/00001	Painting Scraper #3	10.000	Unit	WHCS1/Input	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WHCS1/INT/00001	Painting Scraper #4	10.000	Unit	WHCS1/Input	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WHCS1/INT/00001	Painting Scraper #5	10.000	Unit	WHCS1/Input	WHCS1/Stock
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00007	Painting Scraper #1	290.000	Unit	WH/Mezzanine Stock	WH/Output
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00007	Painting Scraper #2	290.000	Unit	WH/Mezzanine Stock	WH/Output
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00007	Painting Scraper #3	290.000	Unit	WH/Mezzanine Stock	WH/Output
<input type="checkbox"/> Painting Scraper Set 1	WH/INT/00007	Painting Scraper #4	290.000	Unit	WH/Mezzanine Stock	WH/Output

odoo Internal Transfers (Mezzanine - Output)

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration

Stock Operations / WH/INT/00007

Print Attachment(s) Action 11 / 12 < >

RESERVE FORCE AVAILABILITY CANCEL SCRAP

DRAFT WAITING AVAILABILITY PARTIALLY AVAILABLE AVAILABLE DONE

↑

WH/INT/00007

Source Location Zone: WH/Mezzanine Stock
Destination Location Zone: WH/Output

Scheduled Date: 03/15/2017 18:47:58
Source Document:

INITIAL DEMAND ADDITIONAL INFO

Product	Quantity	Unit of Measure	Status
Painting Scraper #1	290.000	Unit	Waiting Availability
Painting Scraper #2	290.000	Unit	Waiting Availability
Painting Scraper #3	290.000	Unit	Waiting Availability
Painting Scraper #4	290.000	Unit	Waiting Availability
Painting Scraper #5	290.000	Unit	Waiting Availability

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration

Stock Operations / WH/INT/00007

Print Attachment(s) Action 11 / 12 < >

VALIDATE PRINT CANCEL SCRAP

DRAFT WAITING AVAILABILITY PARTIALLY AVAILABLE AVAILABLE DONE

↑

WH/INT/00007

Source Location Zone: WH/Mezzanine Stock
Destination Location Zone: WH/Output

Scheduled Date: 03/15/2017 18:47:58
Source Document:

OPERATIONS INITIAL DEMAND ADDITIONAL INFO

Product	Quantity	Unit of Measure	Status
Painting Scraper #1	290.000	Unit	Available
Painting Scraper #2	290.000	Unit	Available
Painting Scraper #3	290.000	Unit	Available
Painting Scraper #4	290.000	Unit	Available
Painting Scraper #5	290.000	Unit	Available

odoo Internal Transfers - Traceability

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration

Stock Operations / WH/INT/00007

Print Attachment(s) Action

11 / 13 < >

EDIT CREATE

PRINT RETURN SCRAP

DRAFT WAITING AVAILABILITY PARTIALLY AVAILABLE AVAILABLE DONE

Up/Down Traceability

WH/INT/00007

Source Location Zone: WH/Mezzanine Stock
Destination Location Zone: WH/Output

Scheduled Date: 03/15/2017 18:47:58
Source Document

OPERATIONS INITIAL DEMAND ADDITIONAL INFO

Product	Unit of Measure	From	To	To Do	Done
Painting Scraper #1	Unit	Mezzanine Stock	Output	290.000	290.000
Painting Scraper #2	Unit	Mezzanine Stock	Output	290.000	290.000
Painting Scraper #3	Unit	Mezzanine Stock	Output	290.000	290.000
Painting Scraper #4	Unit	Mezzanine Stock	Output	290.000	290.000
Painting Scraper #5	Unit	Mezzanine Stock	Output	290.000	290.000

Upstream Traceability

PRODUCT	QUANTITY	LOCATION SOURCE	LOCATION DESTINATION
▶ Painting Scraper #1 WH/INT/00007	-290.0 Unit	Mezzanine Stock	Output
▶ Painting Scraper #1 WH/INT/00007	290.0 Unit	Mezzanine Stock	Output
▶ Painting Scraper #2	-290.0 Unit		
▶ Painting Scraper #2	290.0 Unit		
▶ Painting Scraper #3	-290.0 Unit		
▶ Painting Scraper #3	290.0 Unit		
▶ Painting Scraper #4	-290.0 Unit		
▶ Painting Scraper #4	290.0 Unit		
▶ Painting Scraper #5	-290.0 Unit		
▶ Painting Scraper #5	290.0 Unit		

odoo Internal Transfers (WH/Output - Store/Input)

Inventory / WH Canadian Colors: Internal Transfers / New

SAVE DISCARD

MARK AS TODO VALIDATE CANCEL

DRAFT WAITING AVAILABILITY PARTIALLY AVAILABLE AVAILABLE DONE

Source Location Zone: WH/Output Destination Location Zone: WHCS1/Input

Scheduled Date: 03/15/2017 19:14:36 Source Document: e.g. P00032

INITIAL DEMAND ADDITIONAL INFO

Product	Quantity	Unit of Measure	Status
Painting Scraper Set 1	10.000	Unit	New
Add an item			

Add an internal note that will be printed on the Picking Operations sheet

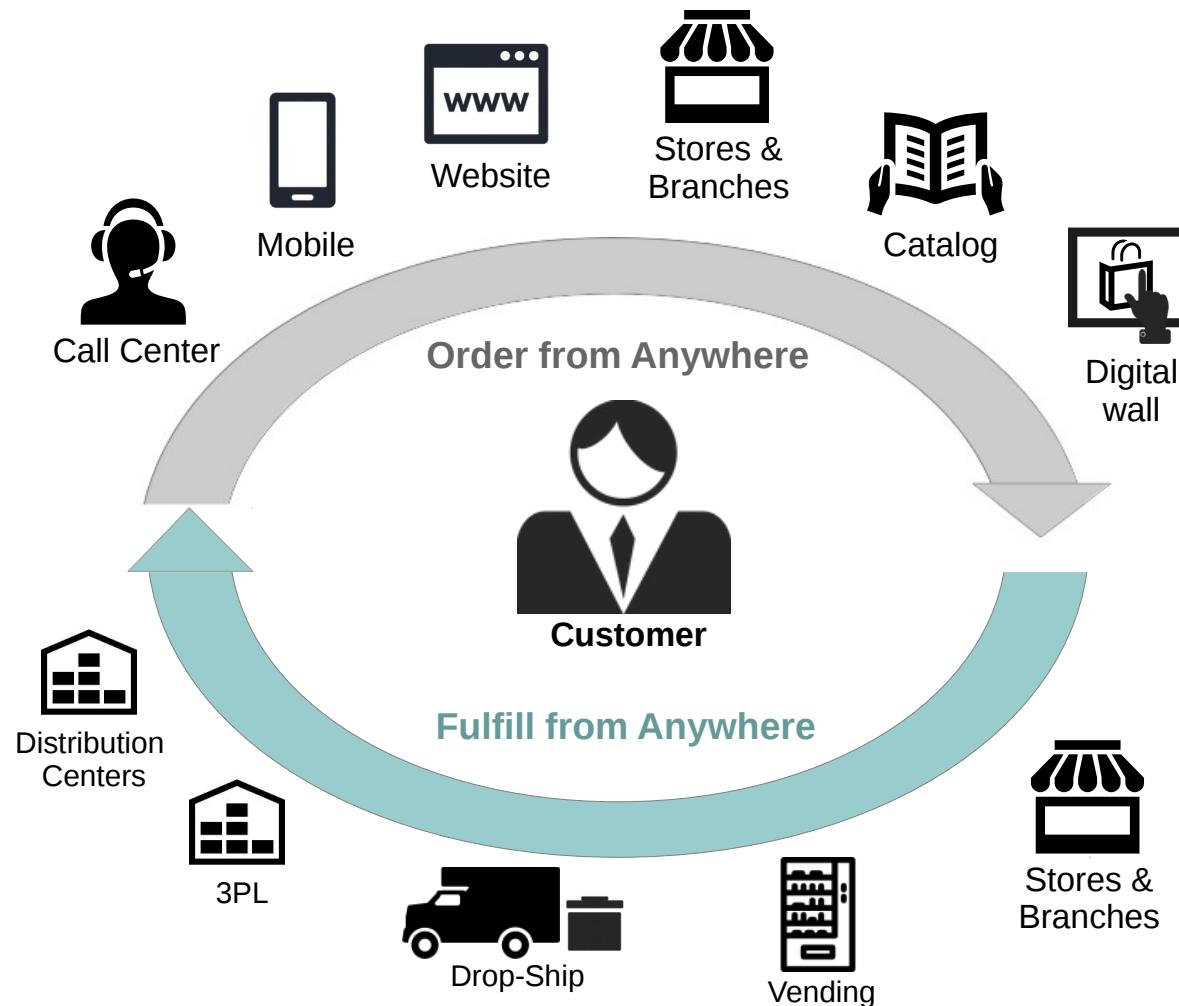


odoo

Omni-channel Fulfillment

Fulfillment Operations for Omni-Channel

- The complete process from point of sales inquiry to delivery of a product to the customer.



How to use « drop-shipping »

- Orders will be shipped straight from suppliers to customers
- Only for products that you can not or do not want to keep in stock
- For niche products. For example, products with high demand and are being offered by large suppliers
- Although you do not handle the direct delivery, you should provide customers a tracking number.

odoo Configuring drop-shipping

Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration

Shipping Connectors

Carriers

- DHL integration
- FedEx integration
- Temando integration
- UPS integration
- USPS integration

Location & Warehouse

Procurements

- Reserve products immediately after the sale order confirmation
- Reserve products manually or based on automatic scheduler

Warehouses and Locations usage level

- Manage only 1 Warehouse with only 1 stock location
- Manage only 1 Warehouse, composed by several stock locations
- Manage several Warehouses, each one composed by several stock locations

Routes

- No automatic routing of products
- Advanced routing of products using rules

Dropshipping

- Suppliers always deliver to your warehouse(s)
- Allow suppliers to deliver directly to your customers

Picking Waves

- Manage pickings one at a time
- Manage picking in batch per worker

Minimum Stock Rules

- Set lead times in calendar days (easy)
- Adapt lead times using the suppliers' open days calendars (advanced)

Warning

- All the partners can be used in pickings
- An informative or blocking warning can be set on a partner

Exercise : Delivery from supplier to customer directly

TO DO

- Create the product « Scaffolding » which is provided by « Turbo Inc ». Due to the extra dimension of this product, the supplier is responsible for making the direct delivery to customers. Sale price 1.200\$CAD
- Add « Turbo Inc » as the supplier for this product
- Select Drop-shipping as logistics route
- Create a sales order for this product. Choose an existing customer or create a new one if you want
- Confirm the sending from the vendor to the customer, go back to **INVENTORY** app. On the dashboard, click on **TO RECEIVE** on the drop-ship card.

odoo Drop-shipping product

Product Name
Scaffolding

Can be Sold
 Can be Purchased

GENERAL INFORMATION INVENTORY SALES VARIANTS INVOICING NOTES

Routes

<input type="checkbox"/> WH Color Store #1: Supply Product from WH Canadian Colors	Weight	0.00
<input checked="" type="checkbox"/> Drop Shipping	Volume	0.00
<input type="checkbox"/> Manufacture		
<input checked="" type="checkbox"/> Buy		
<input type="checkbox"/> Make To Order		
<input type="checkbox"/> WH Color Store #2: Cross-Dock		
<input type="checkbox"/> WH Color Store #3: Cross-Dock		
<input type="checkbox"/> WH Color Store #1: Cross-Dock		
<input type="checkbox"/> WH Canadian Colors: Cross-Dock		

Procurement

Create a draft purchase order
 Propose a call for tenders

Internal Category All / Professional Tools

Vendors

Vendor	Minimal Quantity	Price	Start Date	End Date
Turbo Inc	1.00	1,200.00		

Add an item

odoo Drop-shipping sales order

Sales Dashboard Sales Invoicing Reports Configuration

Order Routing

No order specific routes like MTO or drop shipping
 Choose specific routes on sales order lines (advanced)

Sales Dashboard Sales Invoicing Reports Configuration ictcf@formation@savoirfairelinux.com

Sales Orders / SO006 2 / 2

EDIT CREATE Print Attachment(s) Action

SEND BY EMAIL PRINT CONFIRM SALE CANCEL QUOTATION QUOTATION SENT SALES ORDER

SO006

Customer: Canadian Art Inc Order Date: 03/16/2017 16:05:59
Expiration Date: 03/23/2017 Pricelist: Public Pricelist (CAD)
Payment Terms: Immediate Payment

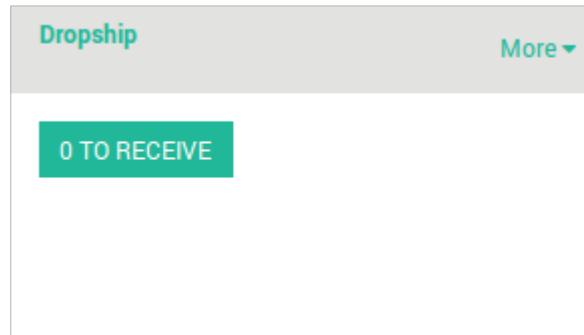
ORDER LINES OTHER INFORMATION

Product	Description	Ordered Qty	Delivered	Invoiced	Unit of Measure	Analytic Tags	Route	Unit Price	Taxes	Discount (%)	Subtotal
Scaffolding	Scaffolding	1.000	0.000	0.000	Unit		Drop Shipping	1,200.00	GST for sales - 5%	0.00	1,200.00

Untaxed Amount : 1,200.00\$
Taxes : 60.00\$
Total : 1,260.00\$



odoo Drop-shipping Confirmation

A screenshot of the Odoo Inventory module. The top navigation bar includes "Inventory", "Dashboard", "Operations", "Inventory Control", "Schedulers", "Reports", and "Configuration". On the far right, there is a user icon and the email "ictformation@savoirfairelinux.com".

The main area shows a "New" record for "Dropship". The top toolbar has buttons for "SAVE", "DISCARD", "MARK AS TODO", "VALIDATE", and "CANCEL". To the right of the toolbar are status buttons: "DRAFT", "WAITING AVAILABILITY", "PARTIALLY AVAILABLE", "AVAILABLE", and "DONE".

INITIAL DEMAND

Product	Quantity	Unit of Measure	Status
Scaffolding	1.000	Unit	New

[Add an item](#)

Add an internal note that will be printed on the Picking Operations sheet

odoo

Inventory Adjustments

Inventory Level



**Critical point
&
Big assets**

**Merchandise
inventory just to**

- provide a good **Service Customer**
- have a good **Inventory productivity**
- have a good **ROI**
- accurate accounting of inventory quantities and cost
- prevent large year end write-downs

Inventory Adjustments

- An inventory adjustment is used to synchronize the inventory/stock to account for issues that occur outside the normal business flow (e.g. receipts, sales, stock counts, etc.)
- An inventory adjustment impacts the stock ledger as the inventory value for a location is impacted. Ending stock value will be decreased/increased (over-valued or de-valued)
- An inventory adjustment item should be a transaction-level item

Types of adjustments

- **Cycle Count** – Adjust quantities when the cause can not be explained.
- **Defective Loss** – Inventory that is damaged and can not be sold or sent back to the vendor.
- **Obsolete Loss** – Item in good condition but not generating any sales volume. It creates a carrying cost.
Once items are removed from inventory, physically they are removed from the warehouse.
- **Inventory Receipt Corrections** – Adjust quantity received.
- **Average Cost** – Adjust quantities, incorrect cost, and new cost to enter the correct average cost that needs to be adjusted.
- **Misc. Adjustments** – Donation, Free items, Samples, Sales Promo, Theft, warehouse use.

Exercise : Annual Inventory Cycle Count

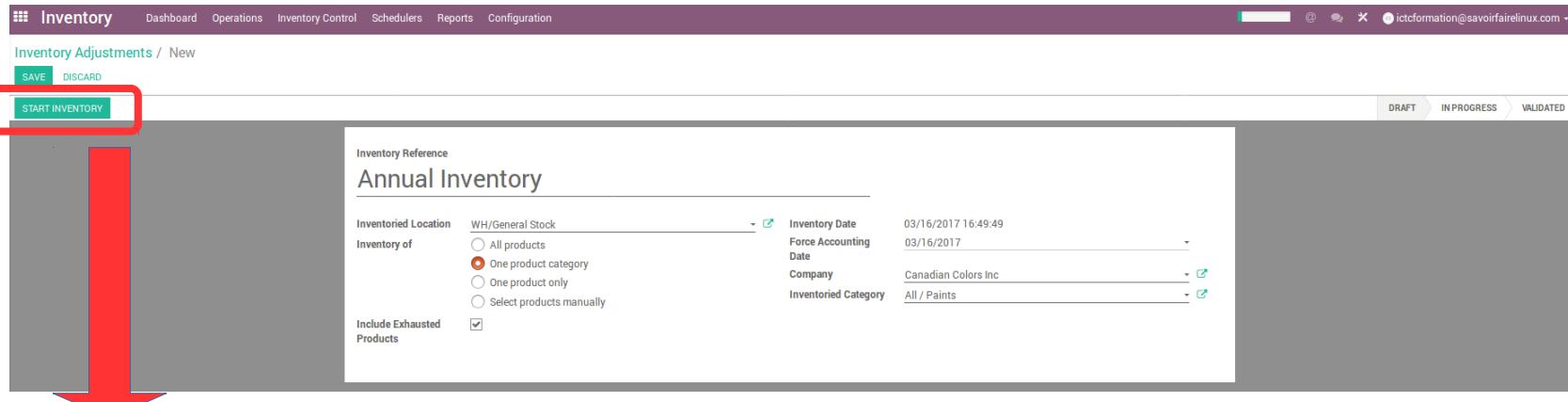
As an annual activity, Canadian Colors wants to do a general inventory count for both the main warehouse and stores.

TO DO

- Using the Inventory Adjustment option, generate the annual inventory activity for each warehouse/store by location (e.g WH/General Stcck)

- Select if you want to do the inventory for all products or for one product. You must specify the product or category.

odoo Inventory Adjustments



This screenshot shows the 'Inventory Adjustments / Annual Inventory' screen after the inventory has been validated. At the top, there are 'EDIT' and 'CREATE' buttons. Below them is a red box containing 'VALIDATE INVENTORY' and 'CANCEL INVENTORY' buttons, which are highlighted with a red arrow pointing down from the previous screenshot. The main form area is titled 'Annual Inventory' and displays the same information as the previous screen. Below this, a table titled 'INVENTORY DETAILS' lists products and their quantities. The table has columns for Product, UoM, Location, Theoretical Quantity, and Real Quantity. All entries show a theoretical quantity of 1,000.000 and a real quantity of 1,000.000. At the bottom, there is a section titled 'Notes' with the following bullet points:

- Inventory adjustments will be made by comparing the theoretical and the checked quantities.
- You can delete lines to ignore some products.
- If a product is not at the right place, set the checked quantity to 0 and create a new line with correct location.

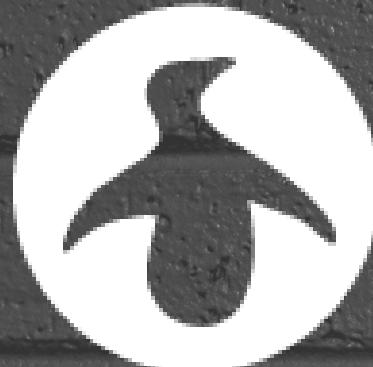
Contributions

This document has been authored and distributed by the functional team of Odoo, Savoir-faire Linux :

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You can download this training document, use and modify it (within diposal and limits of the applicable licence CC-BY-NC-SA), at the following url :

<https://github.com/savoirfairelinux/training-odoo>



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