



UPGRADE PROJECT: BEHIND THE SCENES



How to upgrade, what
you can learn and what
others should watch out
for.



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Why upgrading matters

- New features, security and efficiency
- Stay on a supported version.
- Avoid the risk of unexpected breakdowns of old/custom code



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Assessment & Planning

- Audit existing modules and customisations.
- Identify version discrepancies and deprecated functionality.
- Impact and timeline estimation



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Clean Up First

- Remove unused modules/workflows.
- Remove duplicates and incorrect data, archive obsolete entries.
- Review the quality and compatibility of custom modules.



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Custom Module Strategy

- Use inheritance or extension.
- Update custom modules in the dev sandbox first.
- Write upgrade scripts for renaming or mapping changed fields/models.



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Testing & Staging

- Create a test/staging version and run full tests.
- Include all workflows, integrations and reports.
- Simulate real-volume data and peak usage.
- Fix issues early!



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Cutover & Production Go-Live

- Back up everything.
- Select a time when activity is low.
- Monitor logs and have a rollback plan.
- Share communication and downtime expectations with users.



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Post-Upgrade & Adoption

- Train users on new features and UI changes.
- Gather feedback and track issues early.
- Monitor performance and error rates.



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- Upgrading != just technical, but cultural & process change.
- Specific effort on cleaning & testing pays off massively



What's your biggest concern when thinking about an **odoo** upgrade?



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