



Odoo Online Book

Release 12.0

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This book is dedicated for entrepreneur who wants to implement all-in-one business application out-of-the box for their business.

Odoo Book is an online book written based on Community and Enterprise Edition. This book covers best implementation practice for most used applications such as Sales, Purchase, Inventory, Financial Accounting and Manufacturing.

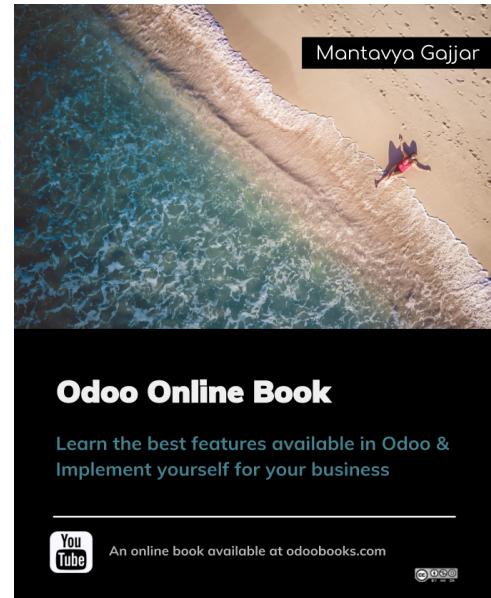
Note: Please comment on the page below, if you have any question related to that topic. You can also send an email to mail@mantavyagajjar.in to propose new topics you would like to have on the book.

You can subscribe to [Youtube](#) channel to receive an instance update about the new videos and pages on this book.

- toc
- genindex

CHAPTER 1

About Odoo Online Book



Odoo online book is dedicated for functional consultants or entrepreneur who wants to implement or use odoo online all-in-one business application out-of-the box. This is an online book written based on Odoo **Community** and **Enterprise** Edition. This book covers best implementation approach for most used applications such as Sales, Purchase, Inventory, Financial Accounting and Manufacturing.

1.1 Why this book?

After writing Odoo 10 Implementation Cookbook, I realized that it is too difficult to have the latest and up-to-date printed book of each version for the fast evolving business application. Odoo release its stable version every 12 to 15 months. The aim of this book is to guide you through step-by-step configuration for business problems.

1.2 Credits

Thanks to all the contributors of Odoo Official Documentation project as many pages/topics of this book was actually taken from <https://www.odoo.com/documentation>.

1.3 License

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1.4 Updates

You can subscribe to [Youtube](#) channel to receive an instance update about the new videos and pages on this book.

You can follow [Twitter](#) channel to get the updates about the book.

1.5 About the Author

Mantavya Gajjar has 12+ years' experience in Odoo, starting from TinyERP and OpenERP. He started his career as a developer, he developed many new features in TinyERP, OpenERP and Odoo. He has graduate and postgraduate degrees in Computer Applications from Gujarat Vidyapith. In June 2006, he started working for Axelor and TinyERP at Ahmadabad. He has initiated web client for TinyERP and mobile application project for Odoo.

He was the first international employee appointed to establish a branch of TinyERP in India (Ahmadabad, Gujarat). He has done everything from registering a legal company to setting up the physical office and recruitment at India. He has interviewed more than eight thousand candidates in the last 12 years, and he has selected and trained more than three hundred employees for the Indian branch. Most professionals working on Odoo in India are trained by him. As a result, today India (Ahmadabad, Gujarat) is called the Hub of Odoo Developers, and over a thousand Odoo developers are available only in Gujarat.

Mantavya is actively engaged with many universities in preparing and reviewing the syllabus for the Computer Applications and Computer Science courses. He has reviewed thousands of academic student projects. As an alumnus of the Gujarat Vidyapith Computer Science Alumni Association, he contributes his free time to various social activities. He also plays the role of a trustee member and treasurer at Gujarat Vidyapith Computer Science Alumni Association.

1.6 About the Reviewer

Nikunj Jani earned a masters degree in computer applications from Gujarat, India. He began his career in 2007 as a software engineer with an MNC called SATYAM COMPUTERS. In 2009, he joined TinyERP, a division of Odoo, S.A. in India as a team lead. During his tenure of 8+ years with Odoo, he has worked with several versions, including 5.0, 6.0, 6.1, 7.0, 8.0, 9.0, 10.0, and 11.0. He has worked as a functional consultant (business analyst), training manager, and project manager.

Currently, he is the product owner and heads a usability and testing team at Odoo (India) for the upcoming versions. Nikunj is an open source enthusiast who has given 35+ international functional trainings/consultancies to Odoo partners, prospects, and end customers.

Nikunj has a total of 10 years of IT experience, and his specialties include training, consultancy, analysis, project management, usability, and testing new features of Odoo.

1.7 Preface

The Odoo online book covers the implementation best practices and approach to configure the business applications out-of-the-box. With this approach you can configure your Odoo online instance or Odoo.sh or locally installed Odoo on your server.

1.8 Page structure

Each single page on this book have the real time business case and how that business can be configured with Odoo standard features. The page divides in the specific sections, each sections give you enough information to solve the business problem. The major sections as below.

1.8.1 Problem statement

The page has a single line problem statement such as “Create my first quotation”, give you brief information about the business situation, where it uses and which business requires to deal with such situation. Most of the problem statement are “how to ..” questions.

1.8.2 Business case

This section gives you a real-life business case.

1.8.3 Configuration

This sections give you a step-by-step configuration, that help you to fit the real-life business problem in Odoo using the standard features. Some of the page give you steps to configure the options.

1.8.4 Video

This section gives you a link on the PDF or embedded videos on the online book, that shows you the detailed configuration steps and the steps to execute the business case. You can get access to all the videos used in this book at [Youtube](#).

1.8.5 See also

This section has the useful links to the related business cases.

1.9 Conventions

There are different text styles, that used to differentiate the informations, like **Bold text** used to name any screen label, menus, or static information available on the screen while *Italic text* always represents the value.

Images are used to illustrate the confirmation or result, you can understand the topics explain about the which business features and configuration.

CHAPTER 2

Start with Odoo Online

2.1 Introduction

Odoo (On Demand Open Object) is an open source suite of business applications; it became the world's most downloaded and used business application software, with more than 5 million users worldwide. According to Wikipedia, Odoo is an all-in-one management software that offers a range of business applications that form a complete suite of enterprise management applications. The Odoo solution is ideal for SMEs, but fits both small and large companies alike. Odoo is an all-in-one business software capable of covering all business needs, including CRM, website/e-commerce, billing, accounting, manufacturing, warehouse, project management, and inventory, all seamlessly integrated.

Tip: In 2005, Fabien Pinckaers, the Founder and CEO of Odoo, started to develop his first software product, TinyERP. Later in the beginning of 2009 it was renamed to OpenERP, in May 2014, the company was renamed Odoo, a name that has no restrictions and can allow the company to grow in whichever direction.

Odoo offers two different versions of the solution; Odoo Enterprise and Odoo Community Edition. The community edition is free to download and can be used anywhere. The Enterprise edition comes with many out of the box applications, unlimited support software support, migration service. The Enterprise edition can be available as Odoo Online SaaS (Software as a Service) or on Odoo.sh or you can install on your private server too.

The Odoo Online version is hosted on a cloud, and the first app is offered for free for unlimited users. After the first app, there is a fixed monthly subscription fee for the number of apps installed and the number of users. The Community version is the open source version and available for free to use on your own server.

Today, more and more companies are choosing to host their business application on an Odoo online cloud platform, it is too costly for the companies to host their business application on local hardware. This approach requires not only a lot of capital to buy hardware and software licenses, but also creates a lot of responsibilities and risk in backing up data and ensuring stability of the business application.

Let's see, how to implement the most useful business application with step-by-step configurations on Odoo online platform or your own server.

2.2 Manage Instance

2.2.1 Create first Odoo instance

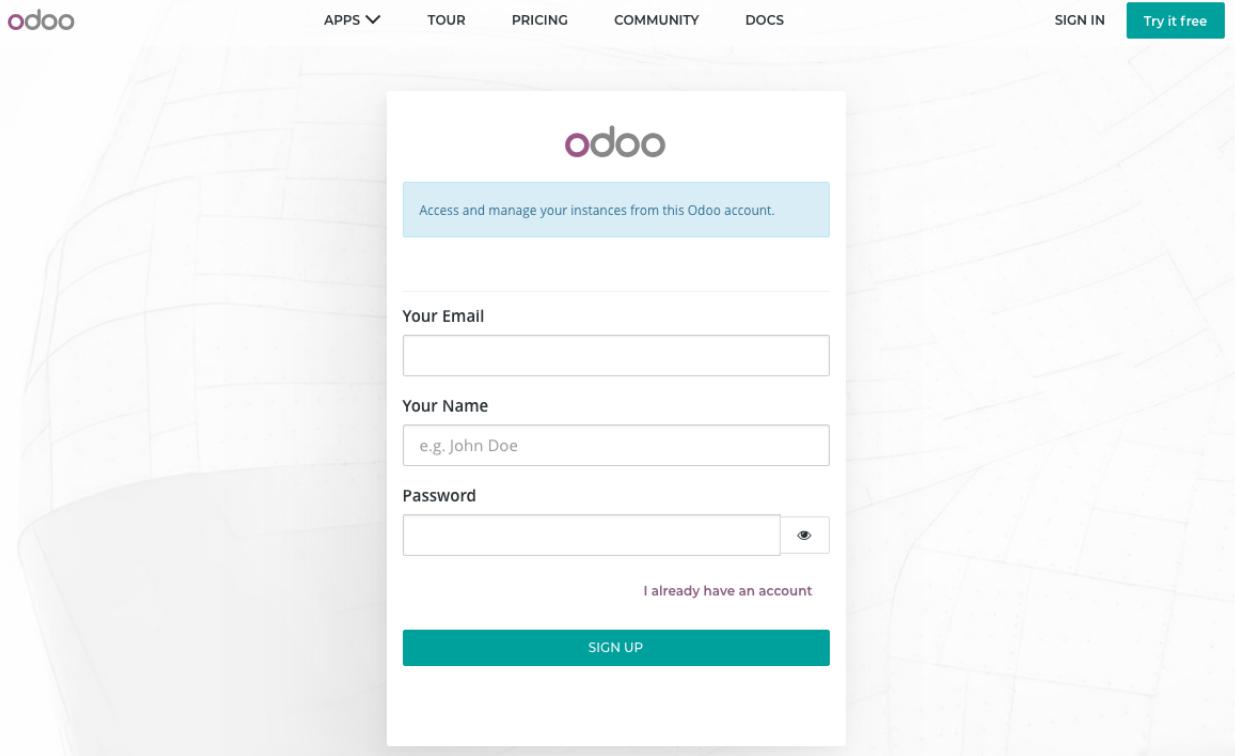
Accessing the Odoo online SaaS version could be very simple across all its different platform available. To start using the Odoo online version you need web browser.

Tip: Odoo is a web based business application designed to run on various modern web browsers. Supported web browsers included

- Google Chrome (recommended)
 - Firefox
 - Safari
-

Signup at [odoo.com](https://www.odoo.com/web/signup)

Make sure that before create a new instance, you have an account at [odoo.com](https://www.odoo.com), if not please create an account, visit <https://www.odoo.com/web/signup> to create a new account.



Create an instance

You can start with one application, the first application you start is free for unlimited users or you can continue the additional applications on the monthly subscription basics.

Login into [odoo.com](https://accounts.odoo.com/trial), open the link <https://accounts.odoo.com/trial> and choose your first application you would like to start with, I choose CRM application to start with.

Choose your first App

Using one App is **FREE** for unlimited users.

BOOST YOUR SALES



CRM



Point of Sale



Sales



eSign

STREAMLINE YOUR OPERATIONS



Project



Inventory



Manufacturing



Timesheets

BUILD STUNNING WEBSITES



Website



eCommerce

MANAGE YOUR FINANCIAL RECORDS



Invoicing



Accounting

GROW YOUR MARKETING REACH



Mass Mailing



Events

BUILD YOUR APPS



Studio

You will be asked to enter your name, email and phone number, the company name decide what will be your sub-domain on odoo.com. I have entered **My Company**, the subdomain allocated me is my-company.odoo.com, however you can change the subdomain by clicking on it.

odoo APPS ▾ TOUR PRICING COMMUNITY DOCS MANTAVYA GAJJAR (MGA) ▾ Try it free

Odoo CRM

Instant access.

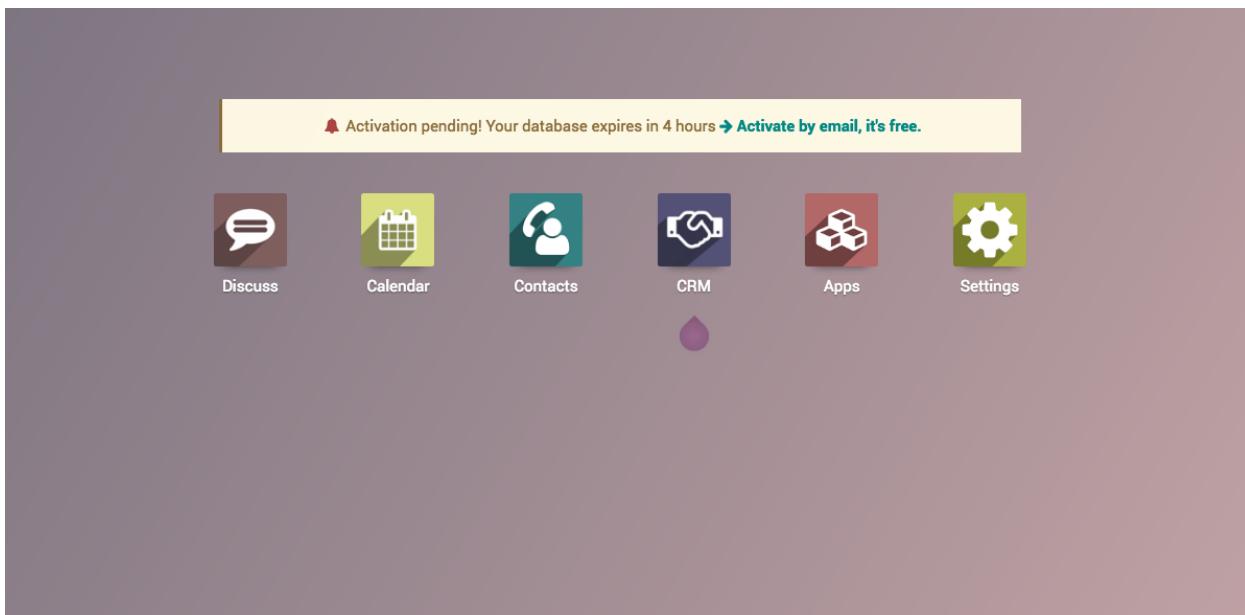
First and Last Name <input type="text" value="Mantavya Gajjar (mga)"/>		
Email <input type="text" value="mga@odoo.com"/>		
Company Name <input style="background-color: #ffffcc; border: 1px solid #ccc;" type="text" value="My Company"/>	Phone Number <input style="background-color: #ffffcc; border: 1px solid #ccc;" type="text" value="+919898098981"/>	
Odoo Domain <input style="border: 2px solid red; border-radius: 5px; width: 100%; height: 20px;" type="text" value="my-company"/>	.odoo.com	
Country <input style="border: 1px solid #ccc; border-radius: 5px; width: 100%; height: 20px;" type="text" value="India"/>	Language <input style="border: 1px solid #ccc; border-radius: 5px; width: 100%; height: 20px;" type="text" value="English"/>	
Company size <input style="border: 1px solid #ccc; border-radius: 5px; width: 100%; height: 20px;" type="text" value="< 5 employees"/>	Primary Interest <input style="border: 1px solid #ccc; border-radius: 5px; width: 100%; height: 20px;" type="text" value="Use it in my company"/>	

➤ By clicking on Start Now you accept our [Subscription Agreement](#) and [Privacy Policy](#)

Start Now

Activate an instance

The first screen you will get on successful instance creation is your home screen. The list of apps will be installed and appeared based on first selected app.



The instance has to be activated with in 4 hours to keep it running forever, else it will be expired in next 4 hours and you may lose changes made to an instance.

Tip: You may lose the data and instance, if you have not activated within 4 hours. If you not receive an email, click on [Activate by email](#) link to resend the activation email.

Video

Let's see how to get start with the first free application, activate it and start using the Odoo online instance. Access the video at <https://www.youtube.com/watch?v=fAi-NGirE44>

2.2.2 Duplicate an Odoo instance

It is advisable to make a duplicate copy of the production database before you change the configuration or try to implement the new feature. You can be sure that production environment will remain stable while working with the test instance. On Odoo online you can create as many as test instance you want. You can create a test instance:

- Before you change anything using Studio App
- To get a test drive for the new features
- To Test the complex configuration
- To test the user acceptance, before you push new feature into production

Danger: Make sure that you verify the url on your browser before you change any configuration of your instance.

Let's see how you can create a test instance before to change any configuration on your production instance. Access the video at <https://www.youtube.com/watch?v=IxILl8z5I7w>

Video

2.3 Mobile

2.3.1 Access Odoo on your mobile phone or tablet

The first Odoo mobile application was launched with the release on Odoo 10. Beginning of the Odoo 9, Odoo have started to adapt the mobile compatible design which will perfect for the desktop and mobile view, different types of views and menus are designed to flow and format properly on mobiles and tablets.

Odoo has also released an iOS mobile application along with the release of Odoo version 11. Today Odoo support mobile application for Android and iOS both mobile based operating systems. You can download the Odoo official mobile application from their respective apps stores for Android download it from Google Play store and for iOS download it from Apple apps store.

Warning: Odoo mobile application is not support with the Odoo community version. Only Odoo Enterprise and Odoo Online versions are compatible with Android and iOS mobile applications.

Let's see the installation of mobile application on Android based mobile, connect it with the Odoo online platform or locally hosted instance and get an access to all the Odoo applications on your mobile.

2.4 User and Features

2.4.1 Manage users and access rights

You have an opportunity to invite your colleagues to signup on the instance during the activation process, you may see the below screen during the signup.

The screenshot shows a user interface for inviting colleagues. At the top left is the Odoo logo. Below it, the text "Invite your colleagues" is displayed. There are three input fields: 1. Name: Nikunj Jani, Email: jni@odoo.com; 2. Name: Harshad Modi, Email: hmo@odoo.com; 3. Name: _____, Email: _____ (empty). At the bottom are two buttons: "Skip" and a teal-colored "Send Invites" button.



Enter the Name and Email address of your colleagues and click on the Send Invitation button.

The screenshot shows a summary of completed tasks: "✓ Your database has been activated", "✓ 2 invitations have been sent", and "☐ 0/2 Invited users logged-in". At the bottom is a teal-colored button labeled "Go to myskinny-demo.odoo.com".



Create user

You can create an user manually or import the list of users (email address) to signup. You can create an unlimited users as soon as you are using single application.

You need name and email address to send the signup invitation email. The email will be sent automatically with signup link, when you create a new user.

Dashboard / Users / Nikunj Jani

SAVE **DISCARD**

3 / 4 < >

SEND AN INVITATION EMAIL

NEVER CONNECTED CONFIRMED

Remember that each user will increase your monthly fee. Check out pricing on www.odoo.com/pricing.

An invitation email containing the following subscription link has been sent:
https://myskinny-demo.odoo.com/web/reset_password?token=i89WGwmFlhpjR5KB1GFT&db=myskinny-demo

Application	Access Rights
Sales	Manager
Inventory	Manager
Accounting & Finance	Advisor
Purchases	Manager
Employees	Manager

Tip: Make sure that you assign correct access rights before you create the new user. Either user have a full access or user may not be able to access certain features when access rights are not configured properly.

All the users with status NEVER CONNECTED shows that, they did not sign up, verify the Email address is correct incase, if they did not receive signup email.

Change access rights

Odoo assign full (manager for all the applications) access rights to all users created through invitation during activation, you may review their access rights on the user form and change if needed.

Name: Nikunj Jani
Email: jni@odoo.com

Access Rights: Active

Module	Role
Sales	Manager
Inventory	Manager
Accounting & Finance	Advisor
Purchases	Manager
Employees	Manager
Expenses	Manager
Helpdesk	Manager
Administration	Settings

Other
Access to Private Addresses:

You can set custom access rights for new users from General Settings.

Settings

SAVE DISCARD

Search...

CRM

Sales

Purchase

Inventory

Invoicing

Employees

Expenses

General Settings

Users

Access Rights
Set custom access rights for new users
→ Default Access Rights

Password Reset
Enable password reset from Login page

Customer Account
Let your customers log in to see their docum
On invitation (B2B)
Free sign up (B2C)

Import & Export
Allow users to import data from CSV/XLS/XL

Multi-company

Multi-company
Manage multiple legal entities with separate accounting

Click on the Default Access Rights like you will see Default User Template user. Access rights for the new users will be copied from this user.

Tip: The additional the rights can be given later from the user configuration before or after user signup.

Let's see how to invite new users to signup and start using the features on Odoo online instance.

2.4.2 Access system settings using developer mode

Odoo application can be viewed in different modes, the default is normal mode suitable for normal users, it designed for great user experience. Odoo runs in three different modes:

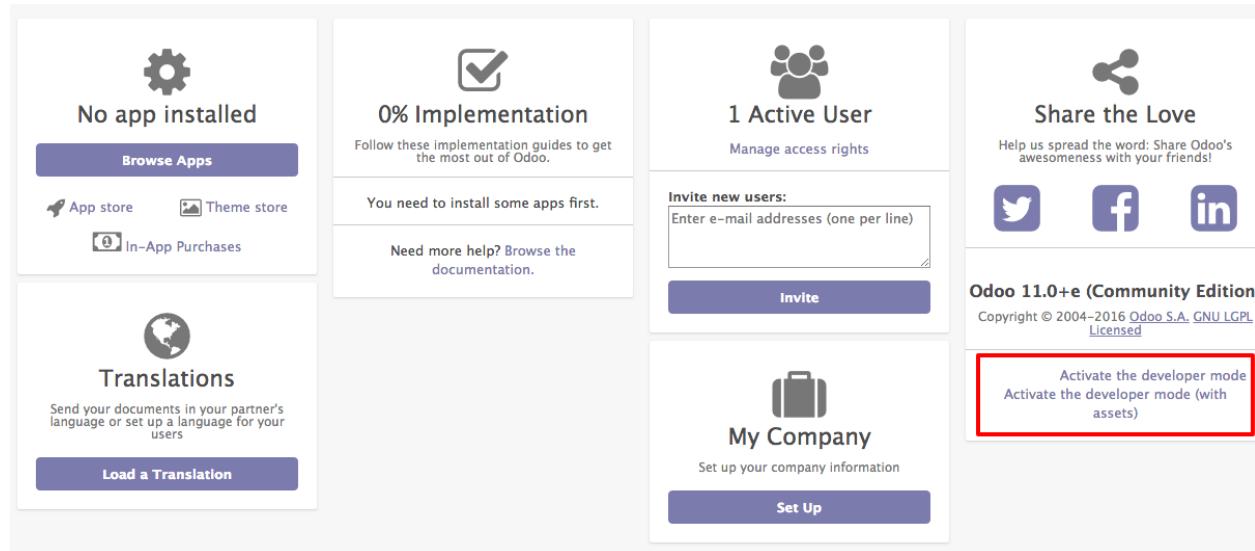
- Normal mode: The default mode; most users are in this mode during production use.
- Developer mode: The name itself suggests something related to technical stuff. You can enter into the configuration of the application and Odoo's internal system, as well.
- Developer mode with assets: In addition to the developer mode, this loads all the resources separately such as JavaScript, CSS files, and images, instead of loading them in a bundle.

Warning: Developer mode with assets mode may be slower than all the other modes, you developer! you are welcome to this mode.

Enter into Debug mode

You can enter into debug mode by adding debug argument in the URL, i.e. Change <https://my-company.odoo.com/web?#home> to <https://my-company.odoo.com/web?debug=#home>.

The second easy way is to enter into Settings, click on the Activate the developer mode link below the version information.



You will be able to see the Technical menu under the Settings application on successful activation of the debug mode, you can access all the system settings there.

Video

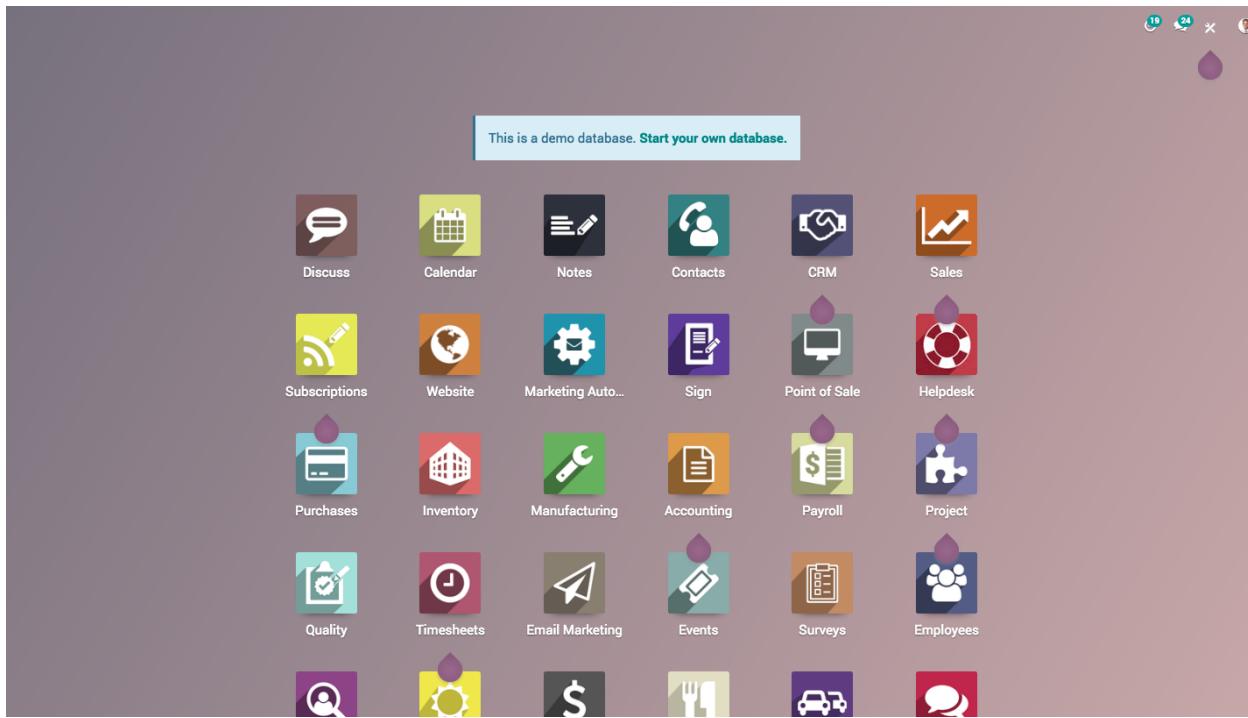
Let's see how to activate the developer mode and debug the assets.

2.4.3 How to test upcoming features?

Odoo offers a platform where you can test latest stable version of the Odoo software or you can also test the upcoming features from development version.

Odoo Online Demo

Odoo instant demonstration can be found at <https://demo.odoo.com>. Online demo is perfect fit for the visitors who wanted to test the latest stable Odoo software without installing or creating an online instance, demo instance will be refreshed every 24 hours automatically so all the data created by you will be erased automatically.



Tip: Don't worry if your URL will be changed from <https://demo.odoo.com> to <https://demo1.odoo.com>, <https://demo2.odoo.com> or <https://demo3.odoo.com>, Odoo started many demo instance, you will be redirected to the instance having low traffic.

Test upcoming features

Odoo Runbot is automated test platform user for the continuous integration designed and developed by Odoo SA. It is integrated with [github.com](#) to test each and every committee made by the Odoo developers. Odoo Employees worldwide use this platform for the internal testing before merging any feature into the master branch.

The screenshot shows the Odoo runbot interface with a list of commits across different branches. The branches listed are:

- Branch**
- 10.0 5h**: ID fo... (Branch or pull) - 65.24% coverage. Status: [Fix] portal: use expected pe... (blue)
- 11.0 1h**: Branch or pull - 66.69% coverage. Status: [Fix] mass_mailing: URI too long (blue)
- 9.0 4n**: Branch or pull - 62.31% coverage. Status: [Fix] crm: Access rights issues... (blue)
- master 7m**: Branch or pull - 66.69% coverage. Status: [IMP] mail: add moderation on ch... (blue)
- saaS-11.2 1h**: Branch or pull - 66.64% coverage. Status: [MERGE] forward port branch 11.0... (blue)

Each commit card includes details such as author, commit hash, age, time, and dependencies. The background color of each card indicates the status of the committee: green for successful tests without errors, red for errors in the code, and blue for tests currently being run by the runbot.

Background colours of committee represents the status of the committee, Green represents successfully tested without any ERROR while Red represents ERROR in the code, either code is not clean or there is any test-case failed. You can not connect the committee which are in Blue color as there are currently being tested by the runbot.

Most of the features under development can be found under `odoo-dev/odoo` or `odoo-dev/enterprise` menu, branche name started with `master-` are the features under development while `10-xxx-xxx` or `11-xxx-xxx` are the fixes for the respective versions.

Connect to the test instance

You can connect and test every single committee on the development branch, click on the `Sign in` to this build icon.

Tip: The default username will be `admin` and password will be `admin` too for all the instance, if may not able to connect in case some visitor has changed the password.

You can perform the test on two different databases:

- Installed all the applications with demo data
- Installed only base application without demo data - you have to install additional applications you want to test.

Danger: Online Demo and Runbot is not suitable platform to prepare the demo as no guarantee to get the same data all the time, because several users using those instances so data may change without notifications.

CHAPTER 3

Customer Relationship Management

3.1 Organize the pipeline

3.1.1 Get organized by planning activities

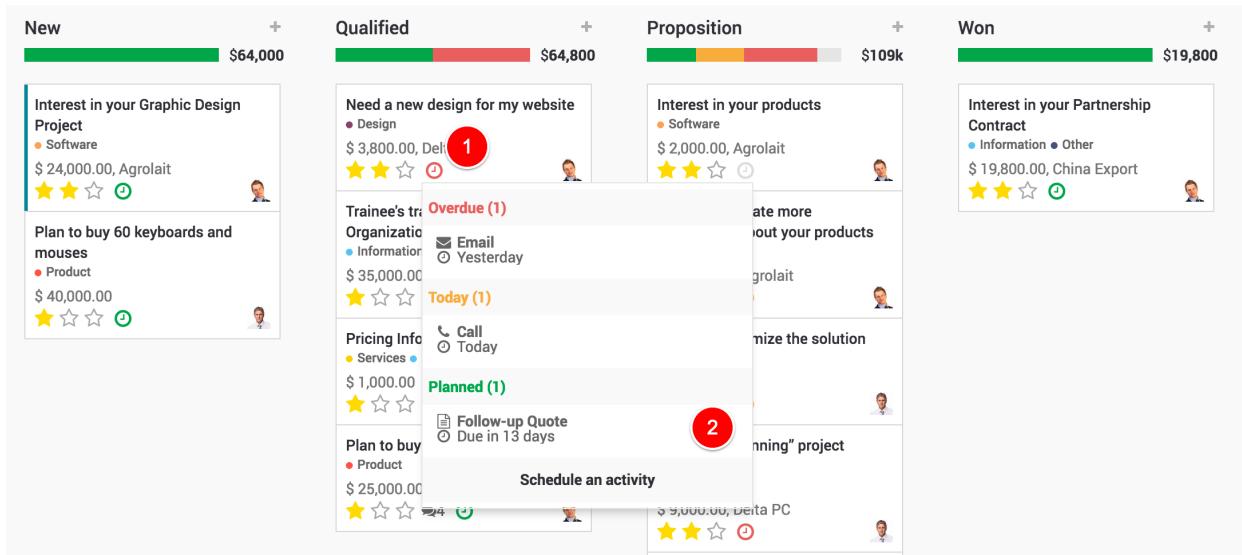
Planning activities is the perfect way to keep on track of your work. Get reminded of what needs to be done and schedule the next activities to undertake.

Your activities are available wherever you are in Odoo. It is easy to manage the priorities of your work.

The screenshot shows the Odoo Sales dashboard. On the left, there's a large orange icon representing a chart with an upward arrow, labeled "Sales". To the right, a sidebar displays four categories: "Lead/Opportunity" (4 Late, 2 Today, 8 Future), "Applicant" (2 Late, 0 Today, 1 Future), "Task" (1 Late, 0 Today, 1 Future), and "Quotation" (1 Late, 1 Today, 1 Future). At the top right, there are notifications for 11 messages and 24 tasks, and a user profile for "Administrator". Below the sidebar, there are two more icons: a blue one with three people and a purple one with a magnifying glass over a person.

Track activities

Activities can be tracked on every single document. Here is an example for opportunities:

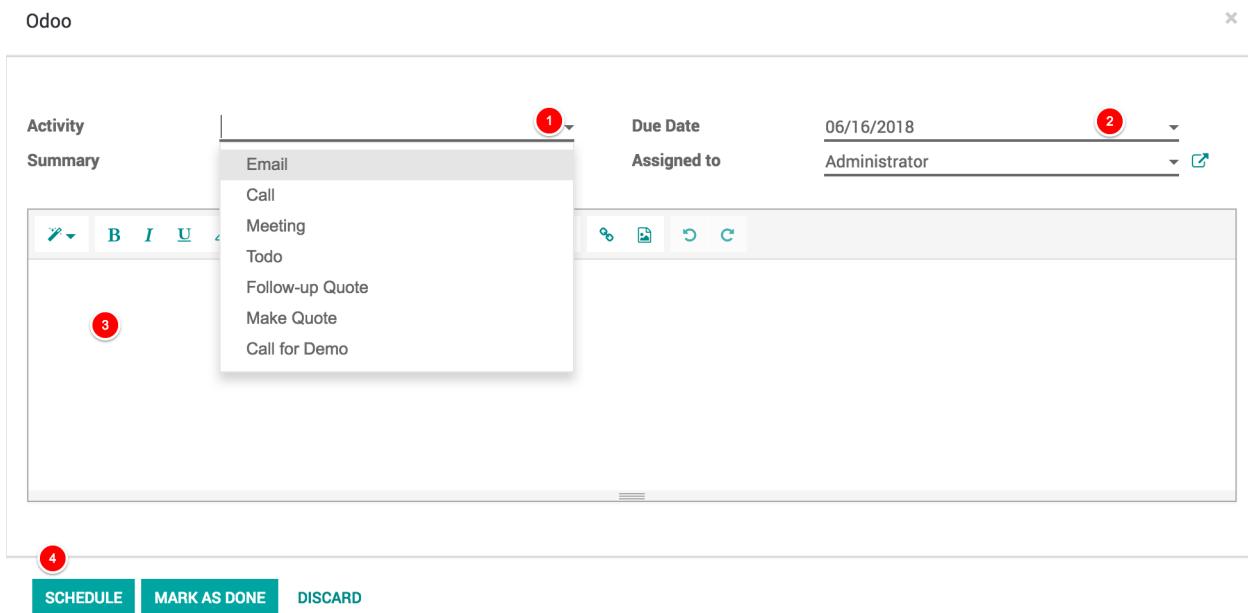


You can have activities which are due, or to be performed today or in future, this can be tracked on two places, kanban card or below the form view.



Schedule next activity

Activities can be planned and managed from the chatters or from the kanban views on opportunity card.



The first activity can be schedule or new activity can be scheduled as soon as you complete the first one.

Set your activity types

A number of generic activities types are available by default in Odoo (e.g. call, email, meeting, etc.). If you would like to set new ones, go to **Settings / General settings / Activity** types.

		Active
Name	Email	
Category	Other	Recommended Next Activities
Summary	<input checked="" type="checkbox"/> Call	
After	0 days	Default Next Activity
	after previous activity deadline	

The next activity “*Call*” will be proposed, when you finish the “*Email*” activity.

Schedule meetings

Activities are planned for specific days. If you need to set hours, go with the Meeting activity type. When scheduling one, the calendar will simply open to let you select a time slot.

Video

Access the video at <https://www.youtube.com/watch?v=zO5u0EjzlkY>

Video

Access the video at https://drive.google.com/file/d/1RNEIbZ_Gn-jGGgWjBxFDbXrOTaGMszmY/view

3.1.2 Manage lost opportunities

While working with your opportunities, you might lose some of them. You may want to keep track of those opportunities with the reasons you lost them and also the ways to recover them in the future.

Business case

The company planning to revised the price of the product they are selling and they would like to make a test offer or announcement about the opportunity who lost because of the reason “*Too Expensive*”.

Mark an opportunity as lost

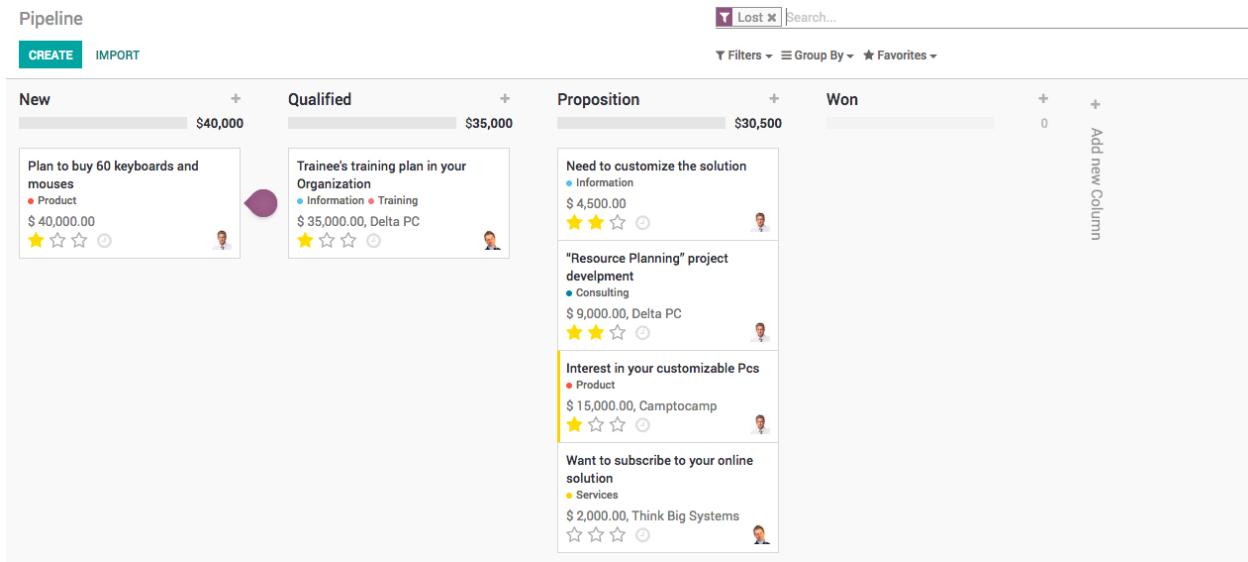
While in your pipeline, select any opportunity you have to mark as lost, you will see a **Mark Lost** button, by clicking on that you have to select the lost reason, that can then select an existing **Lost Reason** or create a new one right there.



Tip: You will find your **Lost Reasons** under **Configuration / Lost Reasons**. You can manage the reasons from if you want to better organize the lost reason.

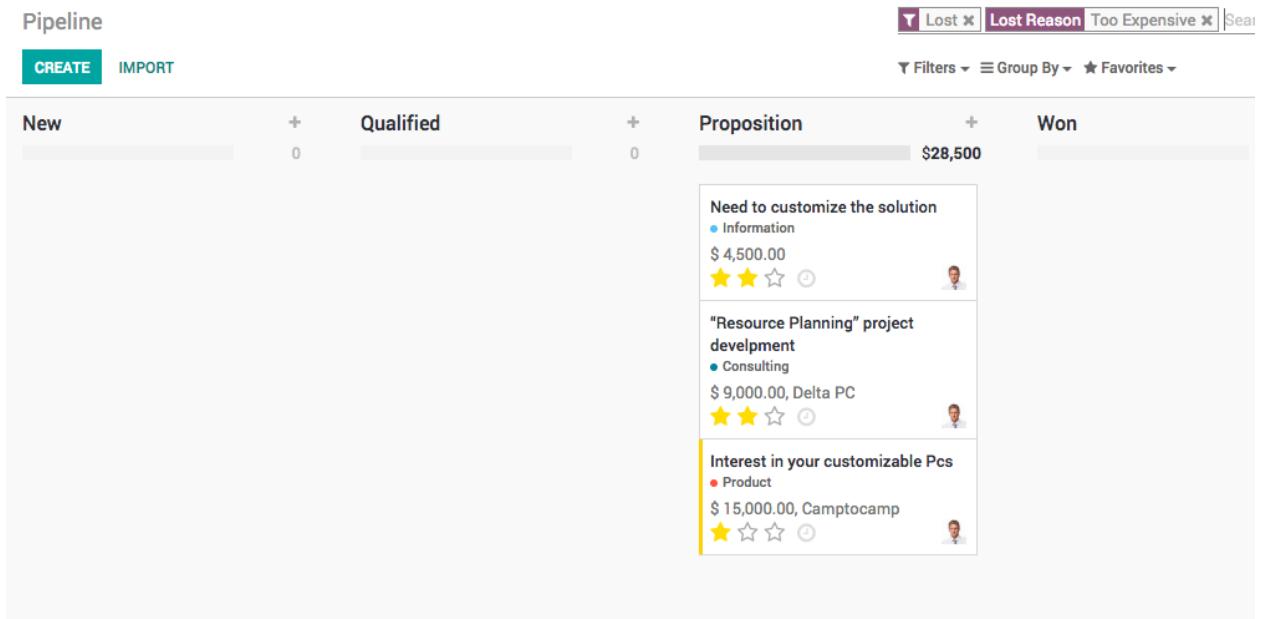
Retrieve lost opportunities

To retrieve lost opportunities and do actions on them (send an email, make a feedback call, etc.), select the **Lost** filter in the search bar.



You will then see all your lost opportunities. If you want to refine them further, you can add a filter on the **Lost Reason**.

For Example, *Too Expensive*.



Restore lost opportunities

From the kanban view with the filter(s) in place, you can select any opportunity you wish and work on it as usual. You can also restore it by clicking on **Archived**.

The screenshot shows the Odoo Opportunity Detail View. At the top right, there are buttons for 'Meeting' (with 0 meetings) and 'Archived'. A red 'Lost' button is also present. The main title is 'Need to customize the solution'. Below it, the status is '\$ 4,500.00 at 0 %'. The details section includes fields for Customer (Email: henry@elight.com), Salesperson (Administrator), Sales Channel (Europe), Priority (2 stars), Tags (Information), and Lost Reason (Too expensive). The 'Expected Closing' field is empty.

You can switch to **List View** select the opportunities you want to restore, from Action click on Unarchive to restore multiple opportunities at once.

The screenshot shows the Odoo Opportunity List View. On the left, there are filters: 'Pipeline', 'CREATE', and 'IMPORT'. The main table lists three opportunities. A context menu is open over the first two opportunities, showing options like 'Action', 'Filters', 'Group By', 'Favorites', 'Export', 'Archive', and 'Unarchive'. The 'Unarchive' option is highlighted. The table columns include Create Date, Opportunity, Customer, Country, Next Action, Stage, Expected Revenue, Probability, Sales Channel, and Salesperson. The total expected revenue is \$28,500.00.

https://drive.google.com/file/d/1Q_3SkHgHap_a7zUXGTyjDaaYVzotqOxa/preview

3.1.3 Automatic leads assignation to team members

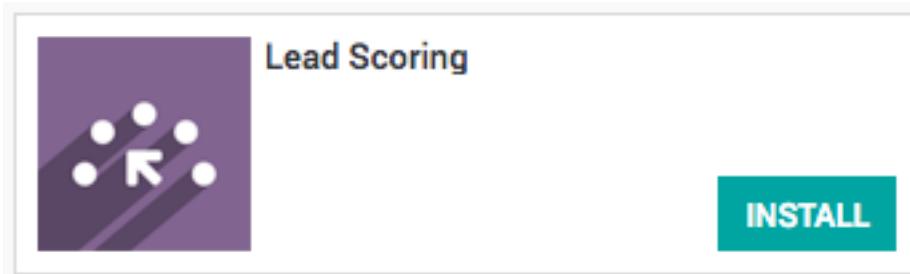
There are multiple sales people working within the sales team, the number of leads increased you have to increased the number of people to work on. The problem starts for the team manager to assign the leads to them when team grows, let's see how you can make the team manager life easy with automatic leads assignation.

Business case

The company have a increased the team size to process the maximum leads per day as they start getting many new leads. They would like to first convert leads into opportunity and assign to the team members within team.

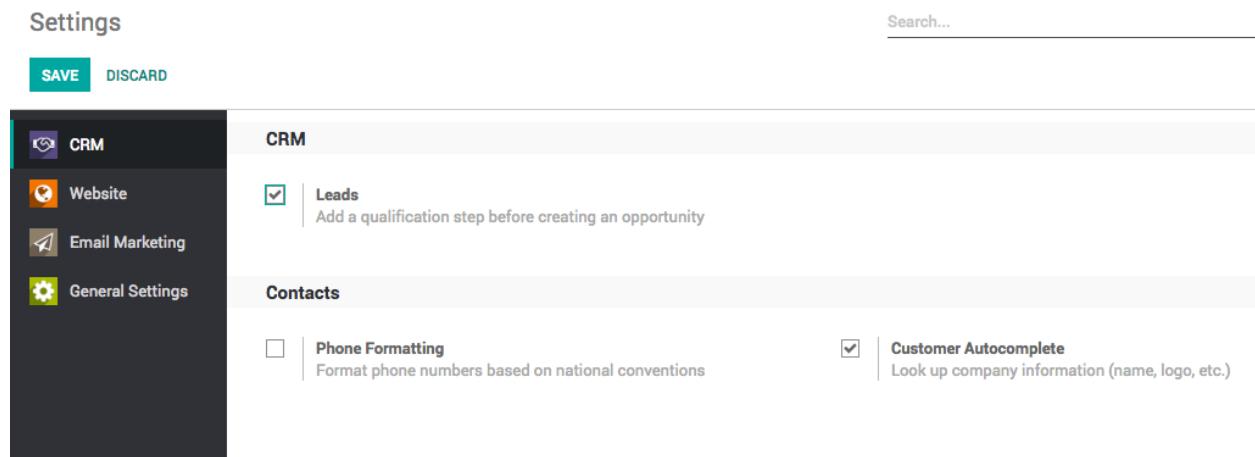
Configuration

Install a module **Lead Scoring** under your **Apps** page available in Odoo Enterprise only.



Qualification step before creating an opportunity

The default sales activity is managed with the opportunity pipeline, you can change that to add the qualification stage before creating an opportunity.



Assumed that you start getting leads into the team, by default all those leads are unassigned.

Add members to your sales channel

You can add members to the sales team; that way those members will see the pipeline structure of the sales team when opening it. Any lead/opportunity assigned to them will link to the sales team. Therefore, you can only be a member of one channel.

You can define maximum leads that should be assigned to the member within 30 days, this will ease the process of assigning the leads to the member easily.

The screenshot shows the Odoo user settings for a user named 'Salesman'. The top bar says 'Open: Salesman'. The main area is titled 'Demo User'. It has a 'SaleTeam' field set to 'Direct Sales'. Under 'Maximum Leads / 30 days', the value is '30'. There's also a 'Domain' field with a dropdown arrow. At the bottom are 'SAVE' and 'DISCARD' buttons.

You can also add the specific domain on each user to be sure that each user get the specific leads to work on based on their expertise or country, etc...

Tip: You can define the size of batch using system parameters `website_crm_score.bundle_size` that defines the number of leads going to be process on each lead assignation schedule.

Activate the lead assignation scheduler

Enable into the debug mode and goto Schedule Action form home screen, just type the word.

The screenshot shows the Odoo Schedule Action form. The action name is 'Crm Score: lead assignation'. The 'Model' is set to 'Sales Channel' and 'Action To Do' is 'Execute Python Code'. The 'Scheduler User' is 'Administrator'. The 'Next Execution Date' is '08/23/2018 22:51:43'. The 'Number of Calls' is '-1', 'Priority' is '5', and 'Repeat Missed' is checked. Below the form, there is a code editor with one line of Python code: 'model.direct_assign_leads()'. A 'Python Code' button is highlighted in blue, indicating it is the active tab.

Search for the *Crm Score: lead assignation* and **Switch On** the schedule action, it will automatically process 50 leads every day. If you want to assign frequent you can switch to Hours instead of Days.

Tip: You can check leads assignation manually by clicking on the Run Manually button on the schedule action.

As soon as the number of leads increase, on each schedule action you have to process more leads, you can do it by setting the system parameters. Create a new system parameters with key `website_crm_score.bundle_size` and set the value.

The screenshot shows the Odoo System Parameters form. A new parameter is being created with the key 'website_crm_score.bundle_size' and the value '250'. There are 'SAVE' and 'DISCARD' buttons at the top right, and a page navigation indicator '16 / 16 < >'.

Video

Access the video at https://drive.google.com/file/d/1EJsfk3MtppcdyzhB_xCvHqC05ZNkPSRj/view

3.1.4 Manage multiple sales teams

You can spread your sales activities into the multiple sale teams depending on the product, service or region, the purpose of setting different sales team might also be to setup the different sales process too.

Business case

The company have a different customer segments **retailer** and **distributors** and they wants to manage through different set of people as the business rules are different along with the sales tactics.

Configuration

Assumed that the **CRM** application is installed.

Create a new sales channel

To create a new **Sales Channel**, goto **Configuration / Sales Channels** under the **CRM Application**. There you can set an email alias to it, every message sent to that email address will create a lead/opportunity under that sale team.

The screenshot shows the 'Sales Channel' configuration screen for a channel named 'Retailer'. At the top right, there is a 'Active' status indicator. Below the title, there is a checked checkbox labeled 'Pipeline'. Under 'Channel Leader', the name 'Kinjal Dave' is listed with a dropdown arrow and a link icon. Under 'Email Alias', the address 'retail' is followed by '@mycompany.com'. At the bottom of this section, there are tabs for 'Team Members' and 'Dashboard', with 'Team Members' being the active tab. In the 'Team Members' section, there is a green 'ADD' button. Below it, five user profiles are listed: Ajay Patel, Kinjal Dave, Kiran Shah, Nikunj Jani, and Vijay Patel. Each profile has a small red 'X' icon to its right. The entire interface is contained within a light gray box.

Add members to your sales channel

You can add members to any channel; that way those members will see the pipeline structure of the sales channel when opening it. Any lead/opportunity assigned to them will link to the sales channel. Therefore, you can only be a member of one channel. This will ease the process review of the team manager.

Add: Channel Members

<input type="checkbox"/> Name	Login	Language	Latest connection
<input type="checkbox"/> Administrator	admin	English	08/25/2018 12:14:44
<input checked="" type="checkbox"/> Ajay Patel	ajay@odoo.com	English	
<input checked="" type="checkbox"/> Kinjal Dave	kinjal@odoo.com	English	
<input checked="" type="checkbox"/> Kiran Shah	kiran@odoo.com	English	
<input checked="" type="checkbox"/> Nikunj Jani	jni@odoo.com	English	
<input checked="" type="checkbox"/> Vijay Patel	vijay@odoo.com	English	

SELECT **CREATE** **CANCEL**

Channel specific sales stages

To jump to the stages for the specific sales challenge go to **Reporting / Sales Channels** under the CRM Application, click on the Pipeline to see the sales process for the specific sales team. The default stages will be looking as below.

Sales Channels / Opportunities

New	+	Qualified	+	Proposition	+	Won	+	+
0		0		0		0		

CREATE **EXPORT** **Add new Column**

Click on the **Add new column** to create a new stage in the sales team, let's create **Qualified Sponsor** stage and drag and drop between the **Qualified** and **Proposition** stage.

Sales Channels / Opportunities

New	+	Qualified	+	Qualified Sponsor	+	Proposition	+	Won	+
0		0		0		0		0	

CREATE **EXPORT** **0 records** **Add new Column**

The stage can be set for the specific team by adding **Team** on the configuration of that stage. Click on the gear icon to **Edit Stage**, by default this stage will be available to all the sales channel, when no **Team** set on stage.

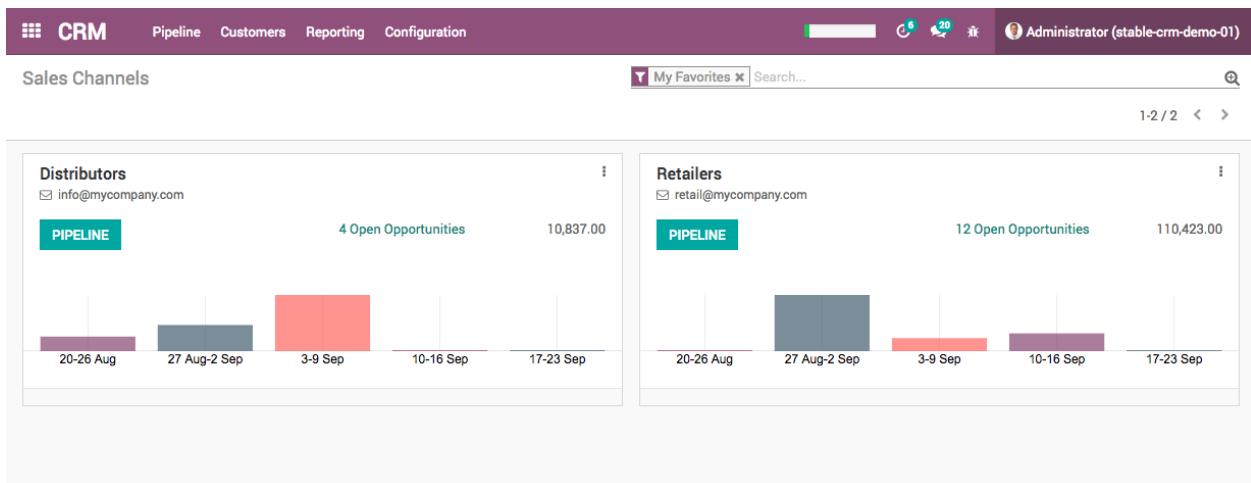
Edit Column ×

Stage Name	<input type="text" value="Qualified Sponsor"/>	Change Probability <input type="checkbox"/>
Team	<input type="text" value="Retailer"/>	
Folded in Pipeline	<input type="button" value="Create and Edit..."/>	
Requirements		

SAVE **DISCARD**

Sales channel dashboard

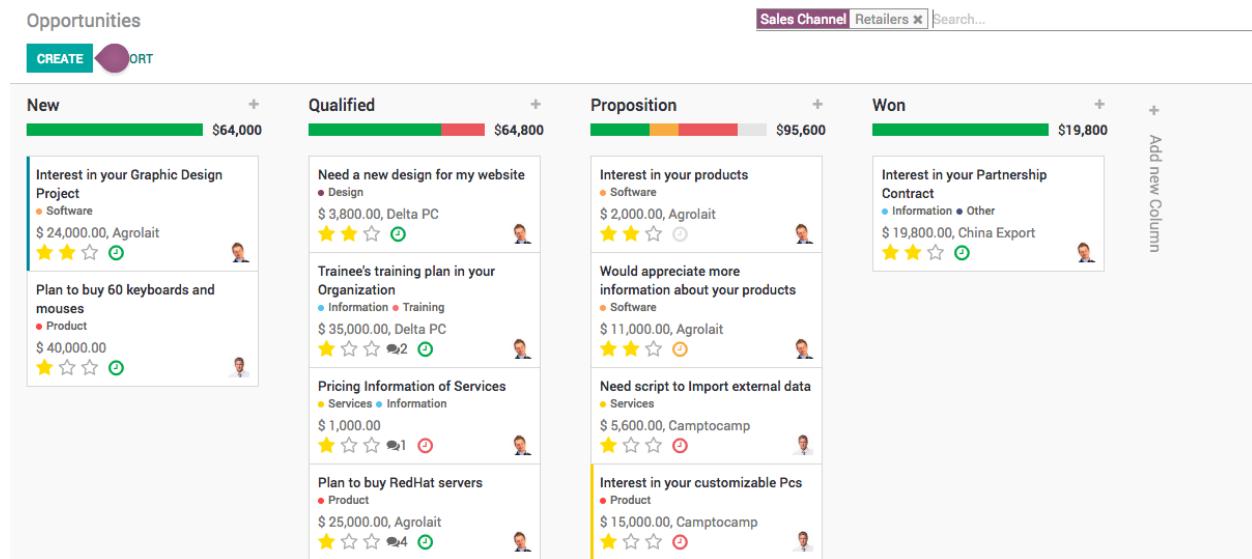
To see the operations and results of all the sales channel at a glance, the sales manager has an access to the **Sales Channel Dashboard** under **Reporting**.



It is shared with the whole ecosystem so every revenue stream is included in it: Sales, eCommerce, PoS, etc.

Sales pipe for specific channel

Click on the **Pipeline** button on sales channel to see the sales pipe for any specific channel, you will find all of its opportunities related to that sales channel.



Tip: Lead score is an application which help you to assign the leads to the respective team members with in team.

3.2 Acquire leads

3.2.1 Convert leads into opportunities

Opportunity is a qualified lead, specific deal has met certain criteria which indicate a high value to the business, or a high probability of closing but when you have details of your visitors, it is just a lead. You have to get the enough details from your visitors, if matches with your business interest you can convert them into opportunity.

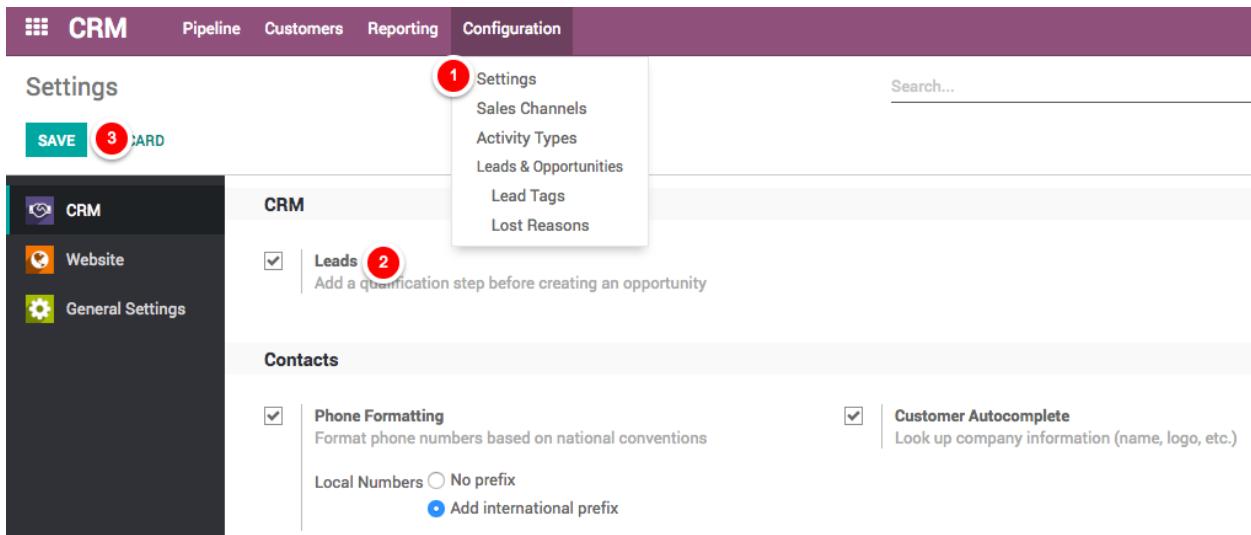
You can collect the leads instead of creating an opportunity and setup the process to qualify those leads before you convert them into opportunity.

Business case

Assumed that **My company** is collecting contacts of all the visitors, through contact us page or visitor tracking system. Create an leads from the contact information and qualify them before converting them into an opportunities.

Configuration

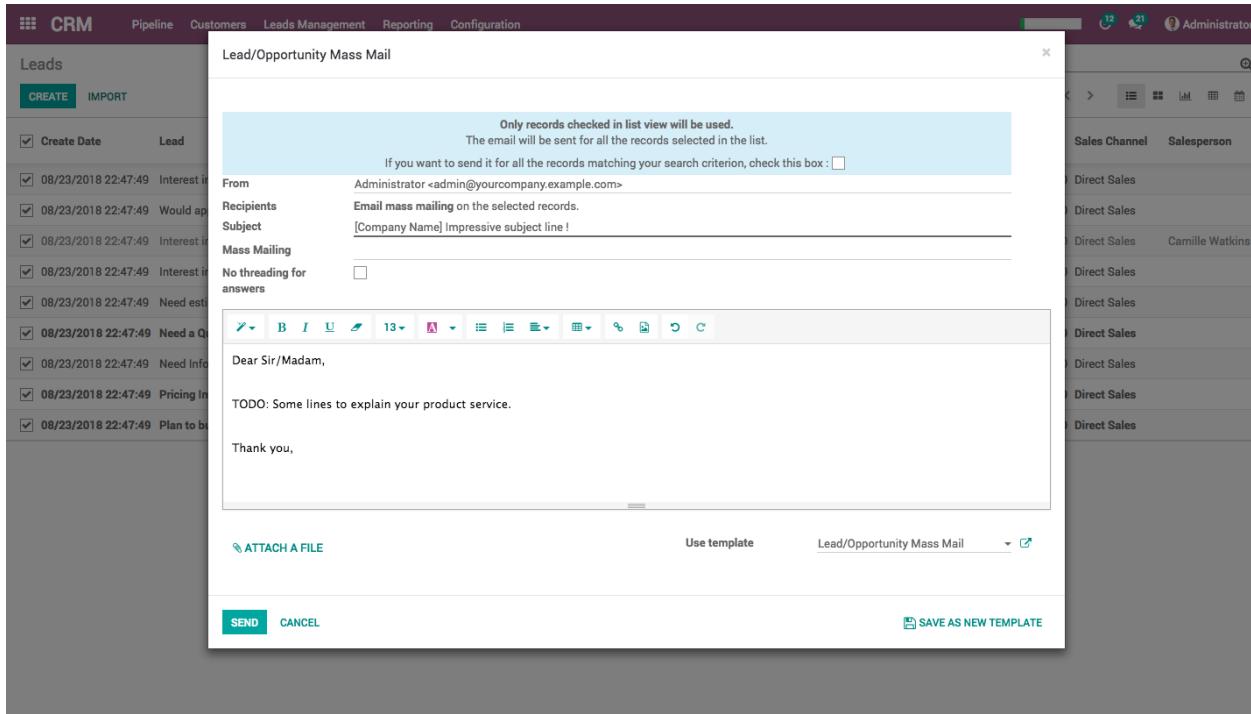
By default you have an opportunity created in the sales channel, you can have leads when someone contact you on the website contact us page or send an email to sales@mycompany.com, to activate leads goto **CRM / Configuration / Settings** and activate the **Leads** feature.



You will now have a new submenu **Leads** under **Pipeline** where they will aggregate.

Qualify Leads

Send the mass mail on new leads received everyday, prepare a good description of your product service details in an email and try to get more information from leads and their expectations from your products or service.



Tip: Define a good subject, include your product / service name into the [] square bracket, that make sure that your email will not go to the spam.

You can convert those leads into the opportunity, when your visitor reply to your email which was sent in mass mail.

Convert lead into an opportunity

The leads can be converted to an opportunity either manually or automatic depending on the volume of leads you have.

Manual conversion

Every day review your leads having reply from the prospects and convert all those leads into an opportunities. You can apply filter **Unread Messages**

The screenshot shows the Odoo CRM interface with the 'Leads' module selected. At the top, there's a purple header bar with tabs for CRM, Pipeline, Customers, Leads Management, Reporting, and Configuration. On the right of the header are icons for Unread Messages (14), Notifications (21), and Administrator. Below the header is a toolbar with 'CREATE' and 'IMPORT' buttons, and search/filter options including 'Unread Messages' and 'Search...'. The main area is a table listing leads. The first lead has an 'Unread Message' icon next to it. The columns include Create Date, Lead Name, Contact Name, City, Country, Email, Phone, Score, Sales Channel, and Salesperson. The leads listed are:

Create Date	Lead	Contact Name	City	Country	Email	Phone	Score	Sales Channel	Salesperson
08/23/2018 22:47:49	Need a Quotation for Computers with Accessories	Carrie Helle	Philadelphia	United States	helle@stoneit.example.com	+1 813 494 5005	13.00	Direct Sales	
08/23/2018 22:47:49	Pricing Information of Services	Oliver Passot	Brussels	Belgium	olivier.passot@balmer.inc.sa	+32 469 12 45 78	17.00	Direct Sales	
08/23/2018 22:47:49	Plan to buy RedHat servers		Wavre	Belgium	agrolait@yourcompany.example.com	+32 10 588 558	17.00	Direct Sales	

Open the wizard Convert to Opportunity wizard form the Action menu and you are ready to convert selected leads into opportunities.

The screenshot shows the 'Convert to opportunities' wizard. It starts with a title 'Convert to opportunities' and a close button. Below it is a section titled 'Conversion Options' with a red circle labeled '1' over the 'Convert to opportunity' radio button. There are also 'Merge with existing opportunities' and 'Apply deduplication' checkboxes. The next section is 'Assign these opportunities to' with a red circle labeled '2' over the 'Sales Channel' dropdown which contains 'Direct Sales'. Below it are 'Salesmen' and 'Force assignment' sections. The next section is 'Leads with existing duplicates (for information)' with a red circle labeled '3' over a table showing one lead with details: Create Date 08/23/2018 22:47:49, Opportunity 'Plan to buy RedHat servers', Type 'Lead', Contact Name 'agrolait@yourcompany.example.com', Email 'agrolait@yourcompany.example.com', Phone '+32 10 588 558', Stage 'New', and Sales Channel 'Direct Sales'. The final section is 'Customers' with a red circle labeled '4' over the 'Use existing partner or create' radio button. The bottom of the wizard has a green 'CONVERT TO OPPORTUNITIES' button with a red circle labeled '5' over it, and a small 'CEL' badge.

Apply duplication option will be selected automatically when system detect the duplicate leads in the system based on the email or phone number, duplicated leads will be displayed below form.

You can change the **Sales channel** if you would like to transfer the opportunity in other channel. You can choose either you would like to link the opportunity with customer by selecting existing or create a new or leave empty. You can create a customer later at the time of create a proposal for them.

The **Salesman** has to be assigned manually while converting leads into opportunity.

Automatic conversion

The automatic conversion and assignation of the opportunity can be done with the help of Lead Score application. You have to install and configure the scoring rules and assignation rules in order to convert leads into opportunity and assign to the correct member in the team.

You can define domain on the sales channel which will fetch leads accordingly and convert it into the opportunity. The domain may include lead scores, page visited by visitor, and other information such as country, city, availability of the email or phone.

Please go through **Automatic leads assignation to team members** topic in Customer Relationship Management section.

3.2.2 Generate leads/opportunities from emails

Every sales channel is capable create lead/opportunity form the incoming emails. You can define the email alias when that receive an email the lead/opportunity will be created in that sales channel.

The screenshot shows the 'Retailer' sales channel configuration. At the top, there's a 'Pipeline' checkbox (checked) and a 'Channel Leader' dropdown set to 'Kinjal Dave'. Below that is an 'Email Alias' field with 'sales' and '@mycompany.com'. A navigation bar at the bottom has tabs for 'Team Members' (selected) and 'Dashboard'. Under 'Team Members', there's a list of five team members: Ajay Patel, Kinjal Dave, Kiran Shah, Nikunj Jani, and Vijay Patel, each with a small profile icon and a red 'X' button to remove them.

By default, any email sent to *sales@mycompany.com* will create an opportunity in the pipeline of the default sales channel.

Configure email aliases

Each sales channel can have its own email alias, to generate leads/opportunities automatically assigned to it. It is useful if you manage several sales teams with specific business processes.

You will find the configuration of sales channels under **Configuration / Sales Channels**.

The screenshot shows the Odoo CRM interface for 'Sales Channels'. At the top, there's a navigation bar with 'CRM' selected, followed by 'Pipeline', 'Customers', 'Leads Management', 'Reporting', and 'Configuration'. Below the navigation is a search bar labeled 'Search...'. Underneath the search bar are buttons for 'CREATE' and 'IMPORT'. To the right of these buttons are filters: 'Filters ▾', 'Group By ▾', and 'Favorites ▾'. The main area displays a list of sales channels with checkboxes next to each name: 'Sales Channel', 'America', 'Europe', 'Point of Sale', 'Website', and 'eBay'. A 'Channel Leader' column is visible on the right side of the list.

Video

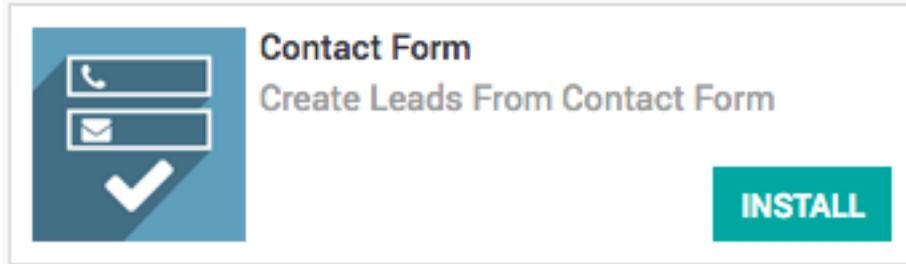
Access the video at <https://www.youtube.com/watch?v=79OehLEHOYU>

3.2.3 Generate leads/opportunities from your website contact page

Automating the lead/opportunity generation will considerably improve your efficiency. Any visitor using the contact form on your website will create a lead/opportunity in the pipeline.

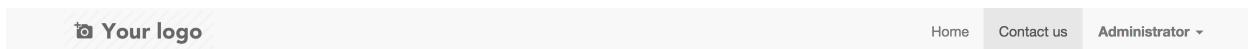
Configuration

To activate the contact us page on your website you have to install the Contact Form application from the Apps.



Contact us page

You benefit from ready-to-use contact form on your Odoo website that will generate leads/opportunities automatically.



Contact us

Contact us about anything related to our company or services.

We'll do our best to get back to you as soon as possible.

Your Name *	<input type="text"/>
Phone Number	<input type="text"/>
Email *	<input type="text"/>
Your Company *	<input type="text"/>
Subject *	<input type="text"/>
Your Question *	<input type="text"/>

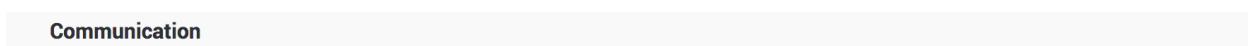
YourCompany
↳ 1725 Slough Ave.
Scranton PA 18540
United States
↳ +1 555 123 8069
✉ info@yourcompany.example.com

↳ [Google Maps](#)

Send

Default sales team

Contact form creates an lead/opportunity into the specific sales channel, to change that specific sales channel, go to **Website / Configuration / Settings** under **Communication** section you will find the **Contact Form** info and where to change the default **Sales Channel** or **Salesperson**.



Note: If the same visitors uses the contact form twice, the second information will be added to the first lead/opportunity in the chatter.

Contact us page

Let's go and fill some information into the contact us page and submit the form.

Contact us

Contact us about anything related to our company or services.

We'll do our best to get back to you as soon as possible.

My Company
📍 United States
✉️ info@yourcompany.com

📍 Google Maps

Your Name *	Rajesh Gajjar
Phone Number	09898098981
Email *	rajesh.gajjar@gmail.com
Your Company *	Odoo India
Subject *	Home appliances distributorship
Your Question *	Interested to get the Home appliances distributorship in Ahmedabad area

Send

Submit for form, visitor will get the **thank you** page having the emergency contact detail in case if they would like to connect quickly before sales people contact them.

Opportunity in the sales pipe

The opportunity will be created in the default sales channel set on the configuration.

The screenshot shows the Odoo Opportunity creation interface. At the top right, there is a 'Meeting' button with a calendar icon and a '0' count. The main title is 'Home appliances distributorship'. Below it, there are fields for 'Expected Revenue' (\$0.00) and 'Probability' (at 10%). There are dropdowns for 'Customer' (set to 'rajesh.gajjar@gmail.com'), 'Email' (same as customer), 'Phone' (09898098981), 'Salesperson' (empty), 'Sales Channel' (set to 'Retailer'), 'Priority' (three stars), and 'Tags' (empty). At the bottom left, there are tabs for 'Internal Notes' (selected) and 'Contact Information'. A note in the notes field says 'Interested to get the Home appliances distributorship in Ahmedabad area'.

Formatting the phone or mobile numbers

Validate contact (phone,mobile) numbers and normalize them on leads and contacts, use the national format for your company country.

The screenshot shows the Odoo Opportunity form for an opportunity named "Home appliances distributorship". The form includes fields for Expected Revenue (\$0.00), Probability (at 10%), Customer (Email: rajesh.gajjar@gmail.com, Phone: +91 98092 89812), Salesperson, Sales Channel (Retailer), Expected Closing, Priority (3 stars), and Tags.

Opportunity		Meeting	
Expected Revenue	\$0.00	Probability	at 10 %
Customer		Expected Closing	
Email	rajesh.gajjar@gmail.com		
Phone	+91 98092 89812		
Salesperson		Priority	☆☆☆
Sales Channel	Retailer	Tags	

Video

Access the video at <https://www.youtube.com/watch?v=Q4FujRKnUHM>

3.3 Marketing Activity

3.3.1 Which marketing platform bring more visitors

The biggest challenge for every business is *how do I drive more traffic to my online store?*, If you able to get the visitor you can convert them into customers. There are many ways to increase the visitors, advertise on the social media marketing is one of the proven way to get attract move visitor.

But the questions is *which social media can bring more visitor and where to invest?*, depending on your product and consumer you should choose the social media platform to invest for the marketing, still it is worth to track which marketing platform bring how many users on your website.

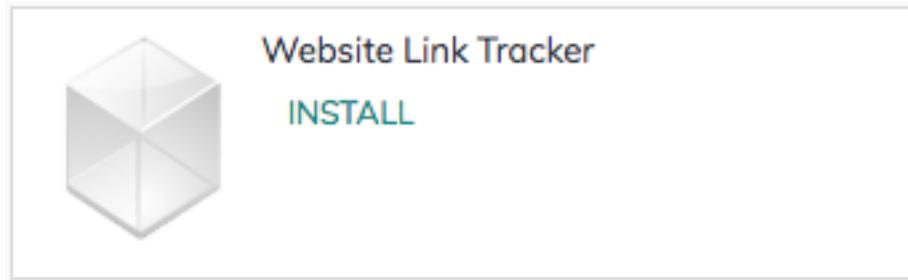
Business case

The *My Company* is running a electronic ecommerce store, they want to invest in the paid marketing on different social media platform such as Facebook, Pinterest, Instagram and Google.

The want to see which marketing platform drives how many new users so that they can focus more on the platform which brings more traffic.

Configuration

Assumed that the **Website Builder** and **eCommerce** applications are already installed. What we need is an Link tracker application which is supporting application to the website.



Install the Website Link Tracker application if it is not installed automatically.

Create a link to share

You can share any website page from your website with the link tracker. It can be a Product, Shop, Home Page, Job Post or News from the Blogs. To create a sharable link that generates statistics, visit that page and go to **Promote / Track this Page**.

Link Tracker

URL Share this page with a short link that includes analytics trackers.
Campaign Those trackers can be used in Google Analytics to track clicks and visitors, or in Odoo reports to track opportunities and related revenues.
Medium
Source
Get tracked link

Your tracked links

Newest | Most Clicked | Recently Used

0	clicks	SuperVisions Computer Science Alumni Association	Copy	Stats
		https://mga.odoo.com/r/lI8	Christmas Special	Google Adwords

Click on the **Get tracked link** button will generate the link that can be shared and that link generates the statistical analysis, such as how many people visited by date, and from which country.

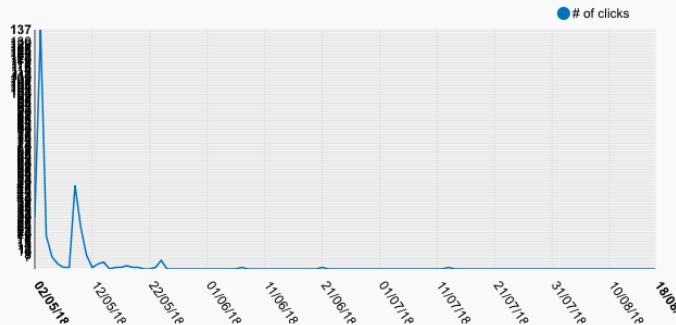
Tip: To generate the correct statistics, you have to set up Odoo correctly on reverse proxy and GeoIP data on Nginx. If not configured correctly you may get the number of visits but not the country information.

The statistics will look like below.

Statistics

All Time | Last Month | Last Week

301 clicks



18 countries



3.3.2 Measure which marketing campaign bring more opportunities

The biggest challenge for every business is *how do I drive more traffic to my online store?*, If you able to get the visitor you can convert them into customers. There are many ways to increase the visitors, advertise on the social media marketing is one of the proven way to get attract move visitor.

But the questions is *which social media can bring more opportunities to me?*, depending on your product and consumer you should choose the social media platform to invest for the marketing, still it is worth to track which marketing platform bring how many users on your website.

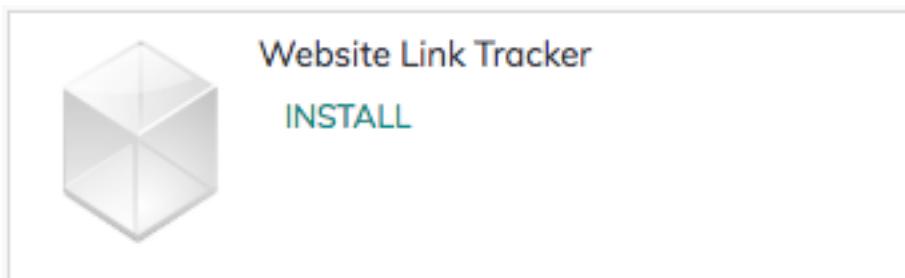
Business case

The *My Company* is running a electronic ecommerce store, they want to invest in the paid marketing on different social media platform such as Facebook, Pinterest, Instagram and Google.

The want to see *which marketing platform how many new opportunities?* so that they can focus more on the platform which brings more business.

Configuration

Assumed that the **Website Builder** and **eCommerce** applications are already installed. What we need is an Link tracker application which is supporting application to the website.



Install the **Website Link Tracker** application if it is not installed automatically.

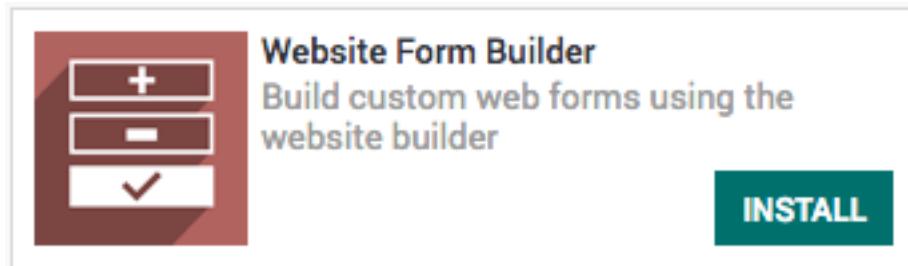
Contact us form

Install the contact us form on the website, so that when user fill the contact detail to get more information about the product, you can have an opportunity created in the CRM application.

Generate leads/opportunities from your website contact page - https://odoobooks.com/en/11.0/crm/generate_lead_from_webstie.html

Form Builder

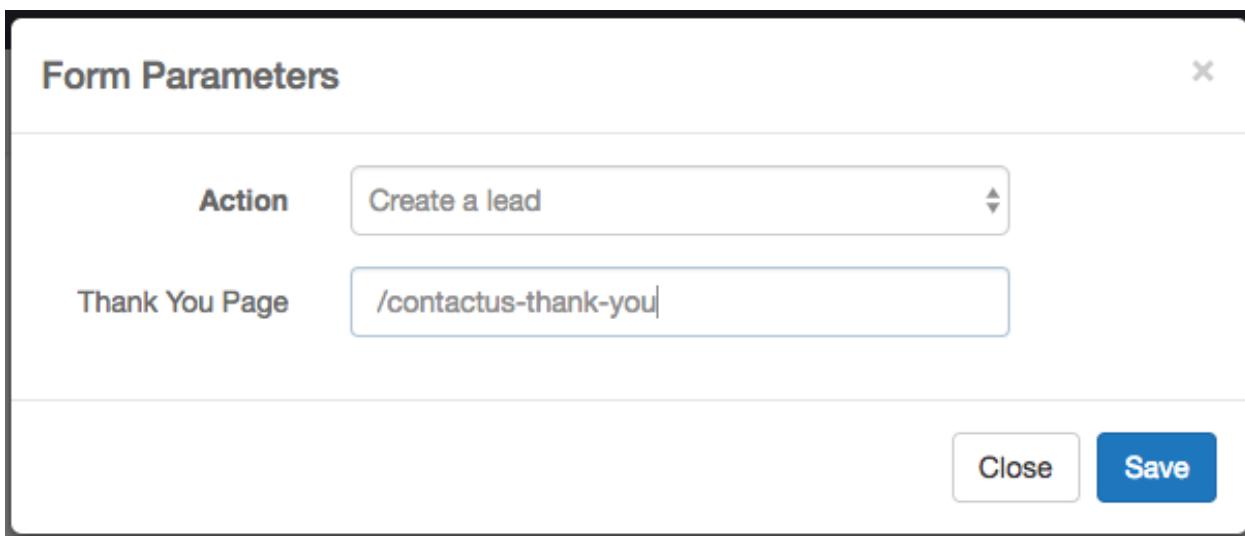
It would be great if you will be able to add the contact us form on any other webpages in your website, it will allows user to make a quick contact to you.



As soon as the application installed you will see a new widget on the website called Form Builder.

Add contact us form on product page

You can add the contact us page on the frequently sold product page, which help us to generate the leads. Drag and drop the **Form builder** widget, select the option Create a lead.



The default fields will be added to the screen, **Opportunity**, you can change the label to **Subject** and add additional fields from the widget customization option, such as Name, Email and Mobile.

Bulk order

Contact us

A great way to catch your reader's attention is to tell a story. Everything you consider writing can be told as a story.

Great stories have personality. Consider telling a great story that provides personality. Writing a story with personality for potential clients will assist with making a relationship connection. This shows up in small quirks like word choices or phrases. Write from your point of view, not from someone else's experience.

Great stories are for everyone even when only written for just one person. If you try to write with a wide general audience in mind, your story will ring false and be bland. No one will be interested. Write for one person. If it's genuine for the one, it's genuine for the rest.

The screenshot shows the Odoo Form Builder interface. On the left, there's a sidebar with options like 'Change Form Parameters', 'Add an existing field', and 'Add a custom field'. The main area contains four input fields: 'Subject *' (with placeholder 'Email'), 'Your Name *' (placeholder 'Name'), 'Email *' (placeholder 'Email'), and 'Mobile *' (placeholder 'Mobile'). Below these fields is a blue 'Send' button.

Create a link to share

You can share any website page from your website with the link tracker. It can be a Product, Shop, Home Page, Job Post or News from the Blogs. To create a sharable link that generates statistics, visit that page and go to **Promote / Track this Page**.

Link Tracker

The screenshot shows the Link Tracker interface. It includes fields for 'URL' (mga.odoo.com/blog/news-room-1/post/), 'Campaign' (Christmas Special), 'Medium' (Google Adwords), and 'Source' (Search engine). There is also a note: 'Share this page with a short link that includes analytics trackers.' Below these fields is a blue 'Get tracked link' button.

Your tracked links

Newest | Most Clicked | Recently Used

0	clicks	https://mga.odoo.com/r/l18	Copy	Stats
		Christmas Special Google Adwords Search engine		

Click on the **Get tracked link** button will generate the link that can be shared and that link generates the statistical analysis, such as how many people visited by date, and from which country.

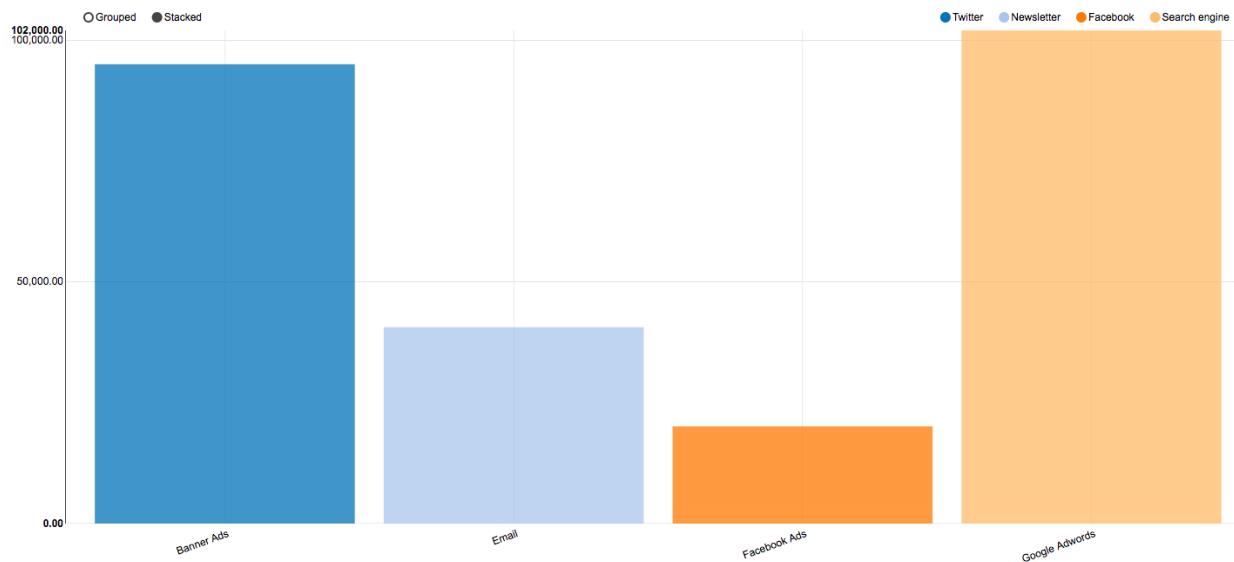
Creating an opportunities

Visitor visit the page through the link you shared on the **Google Searching**, the visitor will be tracked and same information will be attached to the **Campaign**, **Medium** and **Source**, when opportunities created.

Internal Notes		Contact Information		
Customer Name	Rediff Mail		Contact Name	Will McEncroe
Address	Kensington Road 189		Job Position	Title
Street 2...			Mobile	
Melbourne	State	ZIP	Opt-Out	<input type="checkbox"/>
Australia				
Website	e.g. www.odoo.com			
Marketing		Misc		
Campaign	Christmas Special		Referred By	
Medium	Google Adwords			
Source	Search engine			

Campaign Analysis

The number of opportunities can be grouped by the **Source** and **Medium** to check which platform bring how many opportunities coming from which marketing platform.



Can be analysed in detail by applying group by **Source** and then **Medium**. It will give us more clear view on from where the opportunities coming from.

Pipeline

MEASURES ▾

Medium > Source Search...

Filters ▾ Group By ▾ Favorites ▾

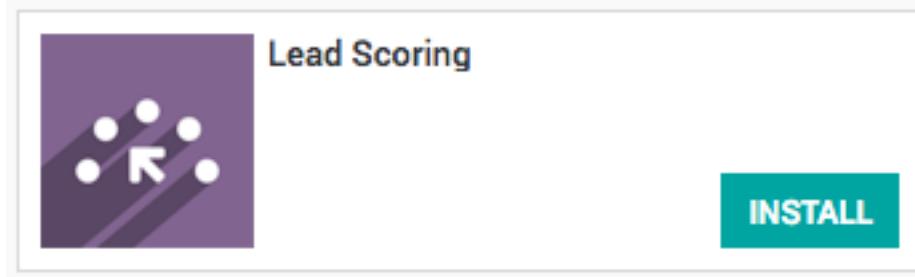
+ Total		
	Count	Expected Revenue
- Total	15	257,700.00
- Search engine	5	102,000.00
+ Google Adwords	5	102,000.00
- Newsletter	4	40,600.00
+ Email	4	40,600.00
- Facebook	4	20,100.00
+ Facebook Ads	4	20,100.00
- Twitter	2	95,000.00
+ Banner Ads	2	95,000.00

3.3.3 Measure the score for an opportunity based on the user behaviour on your website

Tracking your website pages will give you much more information about the interests of your website visitors. Every tracked page they visit will be recorded on your lead/opportunity if they use the contact form on your website.

Configuration

To use this feature, install the module **Lead Scoring** under your Apps page available in Odoo Enterprise only.



Track a webpage

You can track any static page you want on your website under the **Promote tab** you will find **Optimize SEO**. There you will see a **Track Page** checkbox to track this page.

Promote Page Get this page efficiently referenced in search engines to attract more visitors. X

Page Title	Home Website localhost
Description	

Preview how your page will be listed on Google

Home | Website localhost
http://localhost:8069/
[The description will be generated by google unless you specify one]

Define Keywords

describing your page content

Keyword	English	Add
---------	---------	-----

Track Page to better score your leads:

Save **Discard**

You have to visit all the pages and enabled this option for individual pages you want to track on your website.

Create scoring rules

You now have a new menu in your **CRM** app called **Leads Management / Scoring Rules** where you can manage your scoring rules. Here's an example for a *Pricing Page Score*, you can modify for whatever criteria you wish to score your leads on. You can add as many criterias as you wish.

Scores / Aboutus Score

SAVE **DISCARD** 6 / 8 < >

Pricing Page Score

Rule Type	Scoring
Value	8.00
Domain	[[score_pageview_ids.url, 'ilike', '%/pricing']]
Event-based rule	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

0 Leads

Every hour a new leads without a score will be automatically scanned and assigned their right score according to your scoring rules.

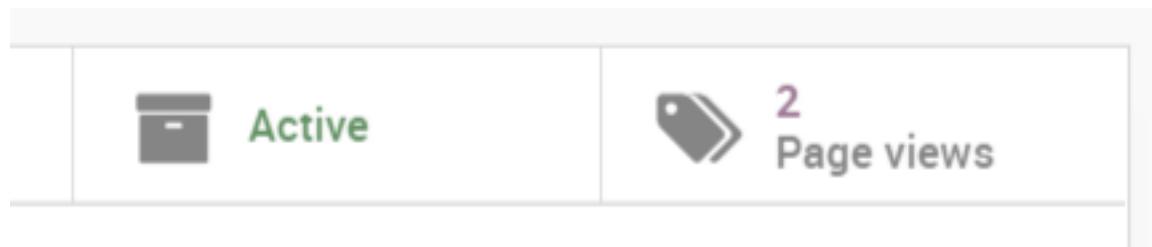
Tip: You can select **Event-based rule** for new rule you are about to create if you want to apply on all the existing leads which was previously computed.

Value on the score rules will be count cumulative to compute the leads/opportunities score when more than one rule found applied for the lead/opportunity.

See visited pages in opportunities

Now each time a lead is created from the contact page it will keep track of the pages visited by that visitor. You have two ways to see those pages, on the top right corner of your lead/opportunity you can see a **Page Views** button but also further down you will see them in the chatter too.

Both will update if the viewer comes back to your website and visits more pages.



The feature will not repeat multiple viewings of the same pages in the chatter. Your customers will no longer be able to keep any secrets from you!

Compute Score

The scheduler executes every hours and compute the score for newly added lead/opportunity.

The **Scoring rules** will be applied those matching with the lead/opportunities details and score will be the summation of values from all those rules.

Marketing			Misc		
Campaign	Christmas Special	▼ <input checked="" type="checkbox"/>	Days to Assign	0.00	
Medium	Google Adwords	▼ <input checked="" type="checkbox"/>	Days to Close	0.00	
Source	Search engine	▼ <input checked="" type="checkbox"/>	Referred By		
Scoring					
Scoring Rules	<input type="button" value="Belgium Score"/> <input type="button" value="Not China Score"/> <input type="button" value="Email"/>				
Language					

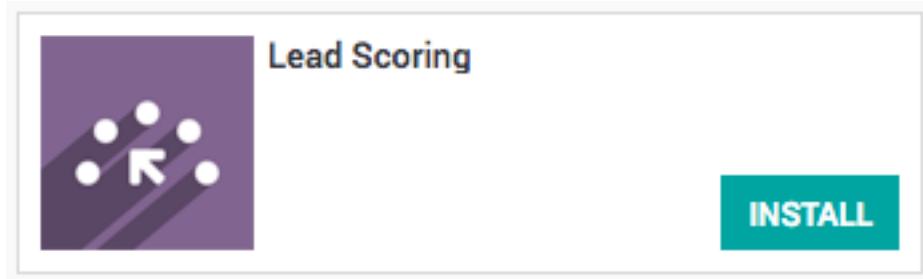
3.3.4 Assign leads based on scoring

With Leads Scoring you can automatically rank your leads based on selected criterias. See how you can *measure the score for an opportunity based on the user behaviour on website*.

For example you could score customers from your country higher or the ones that visited specific pages on your website.

Configuration

Install a module **Lead Scoring** under your **Apps** page available in Odoo Enterprise only.



Generate Leads

Leads/Opportunities can be generated through the below listed methods

- Generate leads/opportunities from emails
- Generate leads/opportunities from your website contact page

Create scoring rules

You now have a new menu in your **CRM** app called **Leads Management / Scoring Rules** where you can manage your scoring rules. Here's an example for a *Pricing Page Score*, you can modify for whatever criteria you wish to score your leads on. You can add as many criterias as you wish.

A screenshot of the Odoo CRM interface. At the top left, it says "Scores / Aboutus Score". There are "SAVE" and "DISCARD" buttons. At the top right, it shows "6 / 8" and navigation arrows. In the top right corner of the main area, there is a "Leads" button with a tag icon and the number "0". The main area has a title "Pricing Page Score". Below the title is a table with the following data:

Rule Type	Scoring
Value	8.00
Domain	[[score_pageview_ids.url', 'ilike', '%/pricing']]
Event-based rule	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

Every hour every lead without a score will be automatically scanned and assigned their right score according to your scoring rules.

Assign leads

Once the scores computed, leads can have enough information to classify that it belongs to which sales team. Lead be assigned to specific teams using the same domain mechanism. To do so go to **CRM / Leads Management / Team Assignton** and apply a specific domain on each team.

This domain may include lead scores, page visited by visitor, and other information such as country, city, availability of the email or phone.

Please go through **Automatic leads assignation to team members** topic in Customer Relationship Management section.

3.3.5 Email marketing on the lost activity to reactive them

Massmail is a great tool to send the bulk emails to your contacts. Reactive the old leads could bring your a business, nothing wrong to send them an email which could reactive opportunities from them lost once.

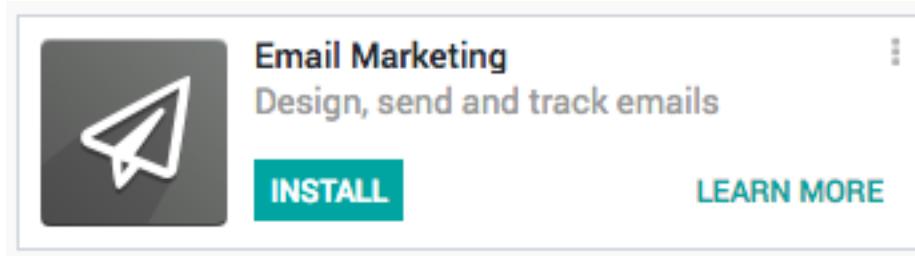
Tip: The correct reason required on the old leads before you send email to them, like discount on the product/service to only those customers who lost actually because of the budget.

Business case

Let's send the offer to have 20% discount on the product/service, who actually lost because they did not have a budget.

Configuration

Email Marketing is a separate app required to be installed separately, this app is not limited to use with the CRM or Sales, It can be used to send the email in bulk for Recruitment, Mailing List, Participants of the Event, etc.



Create mass mail

Create a mass mail from the Email Marketing / Mailings, you need an attractive subject, choose *Leads / Opportunity* in the **Recipients** field, below that you can actually defines the criteria to choose the leads / opportunities which will receive the email from this mass mailing.

I choose all the leads which was Lost and the reason for mark as lost because, they do not have Not enough budget.

Mailings / December special offer, 20% flat discount

SAVE **DISCARD**

SEND NOW **SCHEDULE** **TEST** **DRAFT** **IN QUEUE** **SENDING** **SENT**

Subject: December special offer, 20% flat discount

Recipients: Lead/Opportunity
Match records with **ALL** of the following rules:

- Is Lost **is** **set (true)** → **129 RECORD(S)**
- Lost Reason **=** **Not enough budget**

Mail Body **Options**

Select a template

Send Emails

The process of sending an email takes time based on the number of email to send and how fast your email service provider.

Test before you send

It is advisable to check how email looks in your mailbox before you send it to the prospects, you can check by sending a copy of the email to your own email account by clicking on **Test** button.

Test Mailing

Send a sample of this mailing to the above of email addresses for test purpose.

Recipients: Administrator <admin@example.com>

SEND SAMPLE MAIL **CANCEL**

Send to all

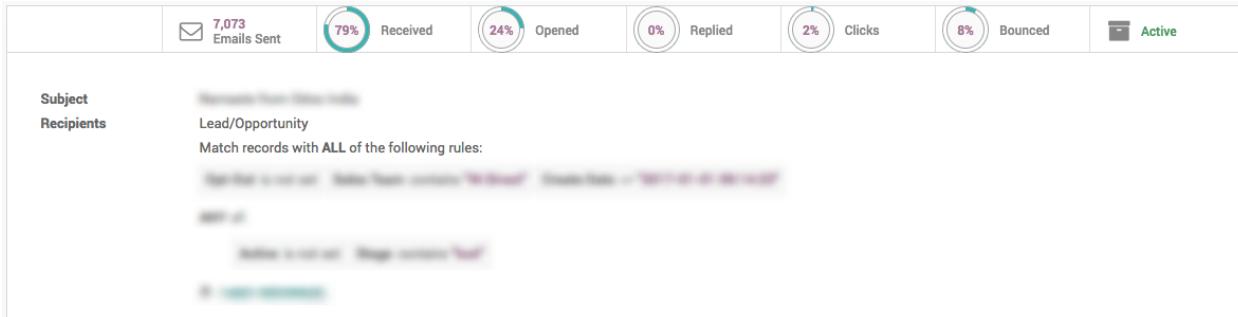
If you found the email looks well on your mailbox, you can send email to all the leads/opportunities who are selected on the mailing.

By default email marketing will be scheduled for the specific date and time and will be processed accordingly. Emails will be generated and queued in the system, automatic scheduler will process that email queue and send those emails.

Note: Some mail marketing may take time to send the emails depending on the email providers, some email may go to spam if your provider does not configure well or the subject and content of the email looks like a spam mail.

Statistics

Statistics will be enabled as soon as schedule start processing the email, you can actually see the number of email sent, bounced, opened by the receiver, replied on that email or number of user clicks on the link if you attached any links in the email.



CHAPTER 4

Sales & Invoicing

4.1 Introduction

4.2 Sales Quotation

4.2.1 Create your first quotation

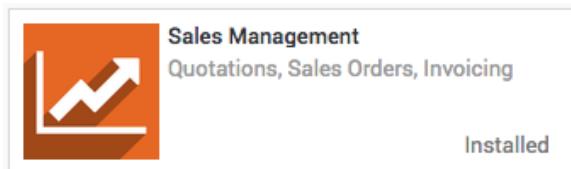
Quotations are documents sent to prospects to offer an estimated price for a particular set of products or services. The prospects can accept the quotation, in which case the seller will have to issue a sales order, or refuse it.

Business case

For example, *My Company* sells electronic products and a client *John Deo* showed interest in buying 3 *iPads* to facilitate their operations. I would like to send them a quotation for those *iPads* with a sales price of *320 USD* per *iPad* with a **5% discount**.

Configuration

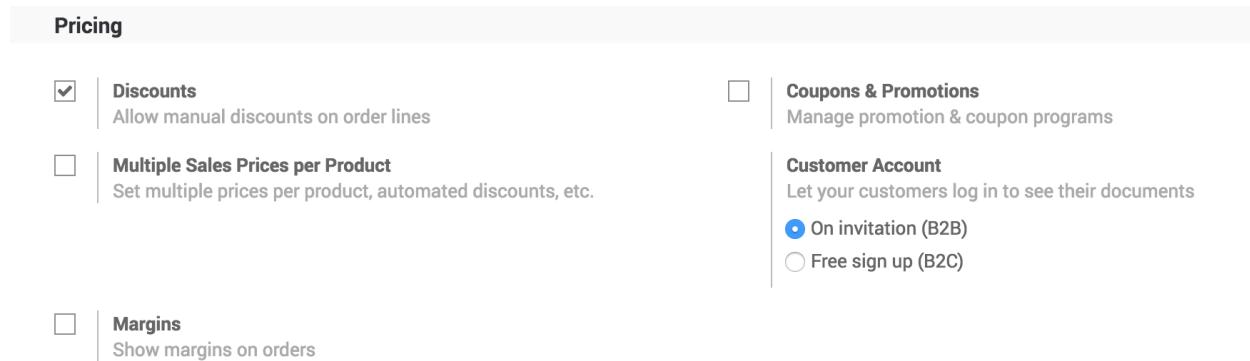
Install the **Sales Management** application. In order to be able to issue quotation, you'll need to install the **Sales Management** application from the **Apps** in the Odoo backend.



Discounts on sales order line

Allowing discounts on quotations is a common sales practice to improve the chances to convert the prospect into a customer.

In our business case, we want to grant 5% discount to our customer *John Deo* on the sale price. To enable the feature, go into the **Sales** application, select **Configuration / Settings** and, under **Pricing** section, select it and **APPLY** to allow manual discounts on order lines.



Create your quotation

To create your first quotation, go to **Sales / Quotations** and click on **CREATE**. Then, complete your quotation as follows:

Customer and Products

The basic elements to add to any quotation are the prospects or customer (the person you will send your quotation to) and the products you want to sell.

From the quotation view, choose the prospect from the **Customer** drop-down list and under **Order Lines**, click on **Add an item** and select your product. Do not forget to manually add the number of items under **Ordered Quantity** and the **Discount** if applicable.

Quotations / SO001

SAVE **DISCARD**

SEND BY EMAIL **PRINT** **CONFIRM SALE** **CANCEL**

1 / 1 < >

QUOTATION QUOTATION SENT SALES ORDER

SO001

Customer	John Doe	Expiration Date	07/31/2018			
		Payment Terms	Immediate Payment			
<input checked="" type="checkbox"/> Order Lines <input type="checkbox"/> Other Information						
Product	Description	Ordered Qty	Unit Price	Taxes	Discount (%)	Subtotal
+	iPad Mini	3.000	320.00	Tax 15.00%	5.00	\$ 912.00
Add an item						
<small>1 year warranty and support provided from apple inc.</small>						
					Untaxed Amount:	\$ 912.00
					Taxes:	\$ 136.80
					Total:	\$ 1,048.80

To apply 5% discount enter 5 in the **Discount (%)**. The discount should be entered between 0 to 100, it computes discount in percentage.

If you don't have any customer or product created before on your Odoo instance yet, you can create them on the fly directly from your quotations:

- To add a new customer, click on the **Customer drop-down menu** and click on **Create and edit**. In this new window, you will be able to record all the customer details, such as the address, website, phone number and person of contact.
- To add a new product, under **Order Line**, click on **Add an item**, click on **Create and Edit** on the drop-down list of **Product** field. You will be able to record your product information (product type, cost, sale price, invoicing policy, etc.) along with a picture.

Taxes

To parameter taxes, simply go on the **Taxes** field of the order line and click on **Create and Edit**. Fill in the details (for example if you are subject to a 15% tax on your sales, simply fill in the right amount in percentage) and save.

			<input checked="" type="checkbox"/> Active	
Tax Name	Tax 15.00%		Tax Scope	Sales
<input checked="" type="checkbox"/> Definition <input type="checkbox"/> Advanced Options				
Tax Computation	Percentage of Price			
Amount	15.0000 %			

Terms and conditions

You can select the expiration date of your quotation and add your company's terms and conditions directly in your quotation (see picture below).

Preview quotation

You can check the quotation before you send to the customer by email, click on the **PRINT** button (upper left corner). You will see the popup window that ask for company master details such as address, contact, email, VAT number, and report layout you want to set for your company.

Choose Your Document Layout x

Update your company details and upload your logo to get a beautiful document.

Company Name
My Company 

General Information

Address	Street...	Website	http://www.yourcompany.com
	Street 2...	Phone	
City	State	Email	info@yourcompany.com
United States		TIN	
Company Tagline	e.g. Global Business Solutions	Company Registry	
		Currency	USD Activate more currencies.
		Report Footer	e.g. Your Bank Accounts, one per line

Report Layout Preview



SAVE Cancel

Click on the **SAVE** button to apply the settings, now you are ready to print your first quotation. Click on the **PRINT** button again, you will get the printable PDF version of your quotation.

Tip: Update your company's details (address, website, logo, etc) can be changed later by clicking on the link **Change Document Template** under the **Settings / General Settings**.

Video

Access the video at <https://www.youtube.com/watch?v=N0kcHM2msHE>

4.2.2 Send quotation by email

Quotations are documents sent to customers to offer an estimated price for a particular set of goods or services. The customer can accept the quotation, in which case the seller will have to issue a sales order, or refuse it.

In traditional business process people use to send the quotation by courier, it is not efficient way as it delays the negotiation and quotation confirmation process, Odoo allows you to send the quotation by email and real-time discuss through email on the quotation.

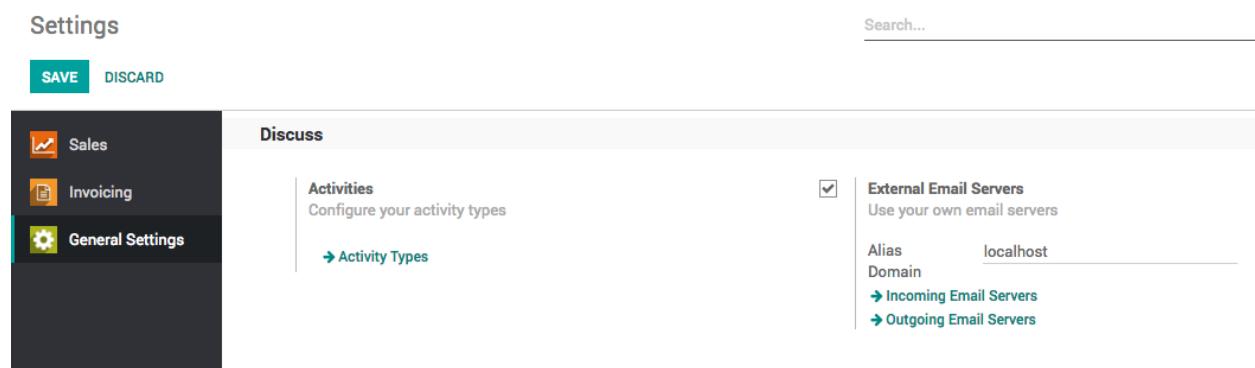
Business case

Let's send your first quotation by email, so that customer can view and start negotiation on the quotation.

Configuration

You don't need any configuration when you are using Odoo online. Email feature is already configured and working out-of-the-box on Odoo online platform.

You need to configure the external email server, if you are not using Odoo online platform, to be precise you need to configure an incoming and outgoing mail servers.



Tip: If you configure only Outgoing Email Servers you will be able to send the quotation but not receive any feedback from prospects through email

Email address on customer

Make sure you have entered the correct email address in the **Email** field, when you create a new customer.

Send by mail

Assumed that the quotation is prepared and ready to be shared with prospect, click on the **SEND BY EMAIL** button to send the quotation by email, automatic email will be prepared based on the predefined template which prepares the beautiful email with content and attachment on the email, review the email content, you can also add the content if you wish and send by clicking on the **SEND** button.

Odoo ×

Recipients Followers of the document and
[Agrolait](#) Add contacts to notify...

Subject My Company Quotation (Ref S0006)

Dear Agrolait ,
Here is the quotation **S0006** amounting in \$ 1,048.80 from My Company.

[View quotation](#)

An email has been sent to Agrolait

SO006_draft.pdf X

 [ATTACH A FILE](#)

[Use template](#) [Sales Order - Send by Email](#) X

SEND CANCEL  [SAVE AS NEW TEMPLATE](#)

Enter email address

You may be asked to enter the email address before send an email, if you have not entered the email at the time of creating the customer.

Please complete customer's informations and email X

Individual Company

Agrolait 

Company ▼

Job Position e.g. Sales Director

Email []

Phone []

Mobile []

SAVE DISCARD

Enter the valid email address and you are ready to send the quotation by email.

Chatter

All the communication made to this quotation can be tracked in chatter, messages send to customer or received from the customer are available below quotation. All the communication history will be preserved and available when quotation gets converted to sales order.

Video

Access the video at <https://www.youtube.com/watch?v=TUcNeJ4CSVg>

4.2.3 Change your quotation layout

All the legal documents such as sales order or invoice required to be printed on the company letterhead with header and footer. You can choose a document layout from 4 different layouts available in Odoo according to your need.

Business case

Let's switch to the beautiful layout. So, not only quotation but all the legal document will be printed with the same layout.

Configuration

The quotation layout can be changed from the **Settings / General Settings** under the **Document Template** section you can change the document layout.



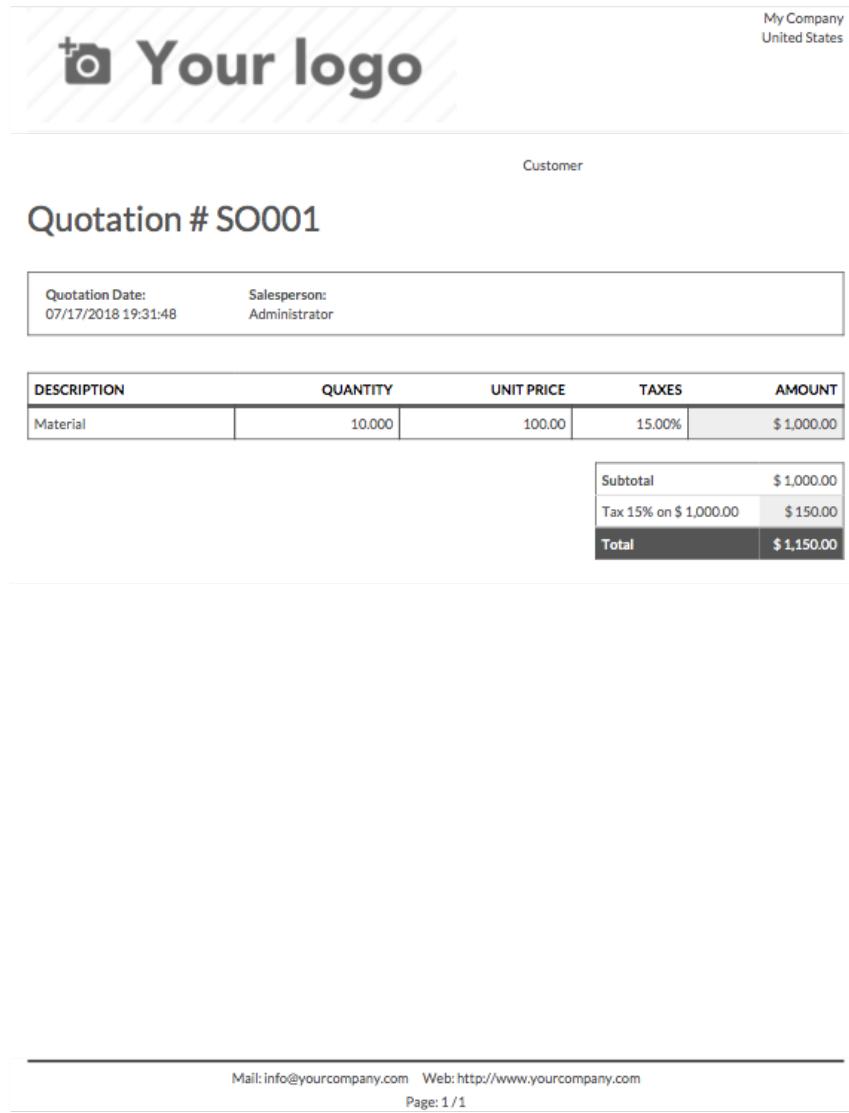
Enter the company information such as name, address, currency and logo. Bottom of the popup windows you can choose the layout for all your legal document which will be printed with header and footer.

Tip: Do not forget to select the company logo, you can click on Preview link to check how it looks before you choose.

Choose the appropriate layout and apply the setting.

Print quotation

The default layout will be switched to the selected one on the configuration, now your quotation will be printed with



the new layout.

4.2.4 Set default terms and condition on quotation

Every quotation issued to the prospect need to have terms and conditions, those terms and conditions are accepted by the customer at the time of accepting the quotation.

The most common terms and conditions includes the payment terms, delivery date, and tax clarification, there are many other points as below can be included in the terms and conditions:

- Acceptance
- Payment Terms
- Taxes

- Warranty
- Claims
- Returns
- Shipment
- Security Interest
- Cancellation
- Indemnification
- Governing Law

Business case

Let's take an example of the trading company, they need to define the terms and conditions required by their nature of business, the terms and conditions should be applied to all the quotation created by any salesman. They want to set the below point as a default terms and conditions:

- Delivery of the goods will take 10 working days
- Other taxes such as octroi will be charges extra
- 100% payment should be released at the time of confirmation

Configuration

Assumed that the **Sales Management** application is already installed.

Default terms and conditions

Let's go to Sales / Configuration / Settings, enable the default terms and conditions and enter all the conditions those required to be set by default on all the quotation.

The screenshot shows the Odoo Sales Configuration Settings page. On the left, there is a sidebar with icons for Sales, Website, Invoicing, and General Settings. Below these are two buttons: 'SAVE' (highlighted in green) and 'DISCARD'. The main area has a search bar at the top right. Under the 'Quotations Templates' section, there is a checkbox for 'Tax-Included Prices' which is unchecked. Below it, there is a checked checkbox for 'Quotations Templates' with a sub-section for 'Design standardized offers' containing a 'Default Template' dropdown and a link to 'Quotation Templates'. Further down, there is another checked checkbox for 'Default Terms & Conditions' with a sub-section for 'Show standard terms & conditions on orders' containing the three bullet points listed earlier: 'Delivery of the goods will take 10 working days', 'Other taxes such as octroi will be charges extra', and '100% payment should be released at the time of confirmation'. To the right of these sections are two other checkboxes: 'Customer Addresses' (unchecked) and 'Warnings' (unchecked), each with a descriptive subtitle.

Click on **SAVE** to apply the settings.

Create a quotation

Goto **Sales / Orders / Quotations** and create a new quotation, you will notice that quotation is empty but the default terms and conditions are set on it.

New

Customer: [dropdown] Expiration Date: [dropdown]
Quotation Template: [dropdown] Payment Terms: [dropdown]

Order Lines	Suggested Products	Other Information			
Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Add an item					

Delivery of the goods will take 10 working days
Other taxes such as octroi will be charges extra
100% payment should be released at the time of confirmation

Untaxed Amount:	0.00
Taxes:	0.00
Total:	0.00

The salesman can make the changes as per the requirement but you can be sure that salesman will never forget to add the default terms and conditions.

Tip: The payment terms will be added automatically at the end of every quotation as a part of the terms and conditions in the printed quotation if any.

Video

Access the video at <https://www.youtube.com/watch?v=hqY5eZxgfRs>

4.2.5 Apply default taxes on products or sales order

Taxes applied in your country are installed automatically for most localizations. Default taxes set in orders and invoices come from each product's Invoicing tab. Such taxes are used when you sell to companies that are in the same country/state than you.

Business case

Let's set the default sales and purchase tax to Tax 15.00%.

Configuration

All the new products created in the Odoo take the default tax set in the **Accounting/Invoicing** settings. To change the default taxes set for any new product created, goto **Invoicing / Configuration / Settings**.

Taxes

Default Taxes Default taxes applied to local transactions		Rounding Method How total tax amount is computed in orders and invoices
Sales Tax	Tax 15.00%	<input checked="" type="radio"/> Round per Line <input type="radio"/> Round Globally
Purchase Tax	Tax 15.00%	
<input type="checkbox"/> TaxCloud Compute tax rates based on U.S. ZIP codes		<input type="checkbox"/> EU Digital Goods VAT Apply right VAT rates for digital products sold in EU

Create new product

Let's create a new product, the default tax which was applied should be applied on this product.

Product Name: Material

Can be Sold
 Can be Purchased

General Information Sales Invoicing Notes

Receivables: Customer Taxes: Tax 15.00% Payables: Vendor Taxes:

Create sales order

Let's create a new order and select the same product on the order line, the tax which was set on the products should be applied on the sales order line tax field.

New

Customer: Customer Expiration Date: Payment Terms:

Order Lines Other Information

Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Material	Material	1.000	100.00	Tax 15.00%	\$ 100.00

Add an item

Setup default terms and conditions in your sales settings ...

Untaxed Amount: \$ 100.00
Taxes: \$ 15.00
Total: \$ 115.00

Now, your salesman do not have to remember that what taxes to be applied on which product.

Video

Access the video at <https://www.youtube.com/watch?v=tq3e17Ccjxk>

4.2.6 Sections on sales orders, sort products in sections with subtotals and page-breaks

Some business who delivers products and services, they need to prepare a quotation that differentiate the products based on Service and Material part. This section will help customer to understand what the total cost of the Material and Service separately.

Business case

Let's take an example of the trading and service company who wants to send the quotation for Air-condition, related material to install it and Installation service.

Configuration

Assumed **Sales Management** application is installed.

Sections on sales orders

Goto **Sales / Configuration / Settings** and enable **Sections on Sales Orders** feature that allows to create sections, sort products in sections with subtotals and page-breaks.

Quotations & Orders

Tax Display
Line subtotals in sales orders
 Tax-Excluded Prices
 Tax-Included Prices

Quotations Templates
Design standardized offers
Default Template
→ [Quotation Templates](#)

Default Terms & Conditions
Show standard terms & conditions on orders

Sections on Sales Orders
Sort products in sections with subtotals and page-breaks
→ [Order Line Sections](#)

Pro-Forma Invoice
Allows you to send Pro-Forma Invoice to your customers

Online Signature & Payment
Let your customers sign & pay online

Customer Addresses
Set specific billing and shipping addresses

Warnings
Get warnings in orders for products or customers

Lock Confirmed Orders
No longer edit orders once confirmed

Configure the sections

The two sections *Service* and *Material* are available by default, you can configure those sections from **Sales / Configuration / Report Layout Categories**.

Report Configuration			
		Search...	⊕
CREATE		IMPORT	1-2 / 2 < >
<input type="checkbox"/>	Name	Add subtotal	Add pagebreak
<input type="checkbox"/>	Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Material	<input checked="" type="checkbox"/>	<input type="checkbox"/>

There are 4 parameters available which can configure each section, that decided how section will be printed on reports.

- **Name** - name of the section to be displayed on the report
- **Add subtotal** - if selected, the subtotal will be displayed for section
- **Add pagebreak** - if selected, once this section print on page, the next section will be printed on the next page. Uncheck Add pagebreak in Service section, if you would like to see all the section on single page.
- **Sequence** - decided the order of the section to be printed on the report

Create a sales order

Create a sales order, select customer and products such as *Split Air Conditioner - 1.5T*, *Copper pipe* and *Installation Service*, beside each product you have to select this product comes into which section.

SO003

Customer	China Export	Expiration Date
Quotation Template		Payment Terms

Order Lines	Suggested Products	Other Information				
Product	Section	Description	Ordered Qty	Unit Price	Taxes	Subtotal
⊕ Installation Service	Services	Split Air Conditioner - Installation Service	1.000	350.00	Tax 15.00%	\$ 350.00
⊕ Split Air Conditioner - 1.5T	Material	Split Air Conditioner - 1.5T	1.000	650.00	Tax 15.00%	\$ 650.00
⊕ Copper pipe	Material	Copper pipe	10.000	12.50	Tax 15.00%	\$ 125.00

[Add an item](#)

Setup default terms and conditions in your sales settings ...

Untaxed Amount:	\$ 1,125.00
Taxes:	\$ 168.75
Total:	\$ 1,293.75

Print sales order

You are ready to print your sales order by sections with subtotals for each sections.

The screenshot shows a Sales Quotation template. At the top left is a placeholder for 'Your logo'. To its right, under 'My Company', it says 'United States'. Below this, the text 'China Export' is visible. The main title 'Quotation # SO003' is centered above a table. The table has the following data:

DESCRIPTION	QUANTITY	UNIT PRICE	TAXES	AMOUNT
• Services				
Split Air Conditioner - Installation Service	1.000	350.00	15.00%	\$ 350.00
				Subtotal: \$ 350.00
• Material				
Split Air Conditioner - 1.5T	1.000	650.00	15.00%	\$ 650.00
Copper pipe	10.000	12.50	15.00%	\$ 125.00
				Subtotal: \$ 775.00
Subtotal				\$ 1,125.00
Tax 15% on \$ 1,125.00				\$ 168.75
Total				\$ 1,293.75

Video

Access the video at <https://www.youtube.com/watch?v=BKiUsvBpkUg>

4.3 Quotation Template

4.3.1 Create quick quotation using quotation template

If you often sell the same products or services, you can save a lot of time by creating standard quotation templates. By using a quotation template you can send a complete quotation in no time.

Business case

The service company who is selling the offshore projects to their customers with standard set of service products such as Project manager days, Developer days, and Project setup fee. The developers days are minimum to 20 days and project manager are one third of the developer days.

Configuration

Assumed that **Sales Management** application is installed.

Quotation template

Quotation template is a great feature that allows user to create offers with group of products those are sold together.

Quotations & Orders

Tax Display
Line subtotals in sales orders
 Tax-Excluded Prices
 Tax-Included Prices

Quotations Templates
Design standardized offers
Default Template Offshore Projects
↳ **Quotation Temp** Default Template
Offshore Projects
[Create and Edit...](#)

Default Terms & C
Show standard terms

Sections on Sales Orders
Sort products in sections with subtotals and page-breaks

Online Signature & Payment
Let your customers sign & pay online

Customer Addresses
Set specific billing and shipping addresses

Warnings
Get warnings in orders for products or customers

Lock Confirmed Orders
No longer edit orders once confirmed

Create a products

Create the list of products that you are going to sale together, in our business case the list of products of type service are as below:

- Offshore Project Setup Fee
- Project Manager Consulting Days
- Developer Days

Create your quotation template

The quotation templates can be found under **Sales / Configuration / Quotation Template**, create or edit an existing template. Enter the appropriate name of the template and select the list of product(s) and their quantity as well as the expiration time for the quotation.

Active
Edit Template

Quotation Template

Offshore Projects

Quotation expires after 30 days

Lines	Suggested Products	Confirmation
Product	Description	Quantity
Offshore project setup fee	Offshore project setup fee	1.00
Project manager days	Project manager days	5.00
Developer days	Developer days	20.00

Add an item

Terms and conditions specific to the offshore projects.

Tip: You can also specify discount, if discount option is activated in the Sales settings.

You can edit the customer interface of the template that they see to accept or pay the quotation. This lets you describe your company, services and products. When you click on **Edit Template** you will be brought to the quotation template editor.

Add blocks
X Discard
Save

Structure
Your logo

Title
Cover

Text-Image
Image-Text

Big Message
Text Block

Features
Big Picture

Three Columns
Slider

Image Gallery
Comparisons

Company Team
Call to Action

66
99

About us
Offshore setup fee
Project manager days
Developer days
Terms & Conditions

Template Header: this content will appear on all quotations using this template.
Titles with style **Heading 1** and **Heading 2** will be used to generate the table of content automatically.

About us

And a great subtitle too

A great way to catch your reader's attention is to tell a story. Everything you consider writing can be told as a story. **Great stories have personality.** Consider telling a great story that provides personality. Writing a story with personality for potential clients will assist with making a relationship connection. This shows up in small quirks like word choices or phrases. Write from your point of view, not from someone else's experience. **Great stories are for everyone even when only written for just one person.** If you try to write with a wide general audience in mind, your story will ring false and be bland. No one will be interested. Write for one person. If it's genuine for the one, it's genuine for the rest.

What we do

The quotation template editor lets you edit the description content thanks to drag & drop of building blocks. To describe your products add a content block in the zone dedicated to each product.

Note: The description set for the products will be used in all quotations templates containing those products.

Create a quotation

When creating a quotation, you have to select a template, product in that template will be added to your quotation.

New

Customer	China Export	Expiration Date	08/17/2018		
Quotation Template	Offshore Projects	Payment Terms			
<input type="button" value="Default Template"/> <input type="button" value="Offshore Projects"/>					
Order Lines	<input type="button" value="Sugg."/>				
Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Offshore project setup fee	Offshore project setup fee	1.000	500.00	Tax 15.00%	\$ 500.00
Project manager days	Project manager days	5.000	200.00	Tax 15.00%	\$ 1,000.00
Developer days	Developer days	20.000	120.00	Tax 15.00%	\$ 2,400.00
Add an item					
Terms and conditions specific to the offshore projects.					
				Untaxed Amount:	\$ 3,900.00
				Taxes:	\$ 585.00
				Total:	\$ 4,485.00

Tip: You can select a template to be suggested by default in the Sales settings.

Send quotation by email

You have to send the quotation by email, so that the quotation can be viewed, accept or reject or paid online by the customer.

Quotation viewed by customer

As a salesman you can start the follow-up on the quotation as soon as you see that a quotation viewed by customer. Everytime customer open the quotation preview you will have a message in chatter, this features of the quotation template help salesman to understand the customer interest on quotation.

[Send message](#)
[Log note](#)
[Schedule activity](#)

 Following

 2

Today

Note by **China Export** - 2 minutes ago
 Quotation viewed by customer

Administrator - 2 minutes ago

 Dear China Export ,

Here is the quotation **SO004** amounting in \$ 4,485.00 from My Company.

[Accept and sign online](#)

(or view attached PDF)

You can reply to this email if you have any questions.
 Thank you,
[read more](#)

Tip: Please remove the attached pdf quotation at the time sending quotation by mail, if you want customer open the quotation preview.

Video

Access the video at <https://www.youtube.com/watch?v=2b7QcMnA3EA>

4.3.2 Increase your sales with suggested products

The use of suggested products is an attempt to offer related and useful products to your client. For instance, a client purchasing a cell phone could be shown accessories like a protective case, a screen cover, and a headset.

Business case

The consulting company want to add the suggested product such as *Software training program* on the quotation when they make a quotation for *Offshore Projects*.

Configuration

Assumed that the **Sales Management** application is installed and quotation template is configured well for the *Offshore Project*.

Suggested products

Open the Offshore Project quotation template, add the product(s) under the **Suggested Product** tab on quotation template. In our case let's add the Software training program as a service product.

Quotation Template
Offshore Projects

Quotation expires after 30 days

Lines Suggested Products Confirmation

Product	Description	Quantity
Software training program	Software training program, a 5 days of functional training program for the consultant.	1.00

Add an item

Terms and conditions specific to the offshore projects.

Send the quotation

Prepare and send the quotation to customer by email. Customer can see the quotation a full product or service detailed specification along with the quoted price, and suggested products at the end. If customer find valuable products or service in suggested products they can directly add them in to quotation by themself before they approve and pay quotation online.

✓ Accept Order

Ask Changes Reject

Introduction
Your Quotation SO004
About us
Offshore setup fee
Project manager days
Developer days

Pricing

Terms & Conditions
Suggested Products
History

This offer expires in
⌚ 31 days

Pricing

Products	Quantity	Taxes	Unit Price	Amount
Offshore project setup fee	1.000 Unit(s)	Tax 15.00%	\$ 500.00	\$ 500.00
Project manager days	5.000 Unit(s)	Tax 15.00%	\$ 200.00	\$ 1,000.00
Developer days	20.000 Unit(s)	Tax 15.00%	\$ 120.00	\$ 2,400.00
			Subtotal:	\$ 3,900.00
			Taxes:	\$ 585.00
			Total:	\$ 4,485.00

Terms & Conditions

Terms and conditions specific to the offshore projects.

Suggested Products

Product	Price
Software training program	\$ 2,500.00

✓ Accept

Feedback

✗ Reject

4.3.3 Online customer approval on quotation

Sending an online quotation can speed up the negotiation process, customer can negotiate and approve the quotation online, this can boost up your sales process and minimise the sales cycle.

Business case

The service company who is selling the *Support pack* which is service offered at fixed price. As soon as customer accept the proposal, customer can start sending the support requests. The company wants to get the online signature from the customer and customer can release the payment based on the payment terms.

Configuration

Assumed that you have installed **Sales Management** application, configure the quotation template for the support packs.

4.3. Quotation Template

69

Online signature

The **Confirmation Mode** on the quotation template available on the **Confirmation** tab is set to *Online Signature* by default. The customer can confirm the quotation by themselves by signing the quotation. Keep it as it is when you just want the online signature from customer.

Create and send quotation by email

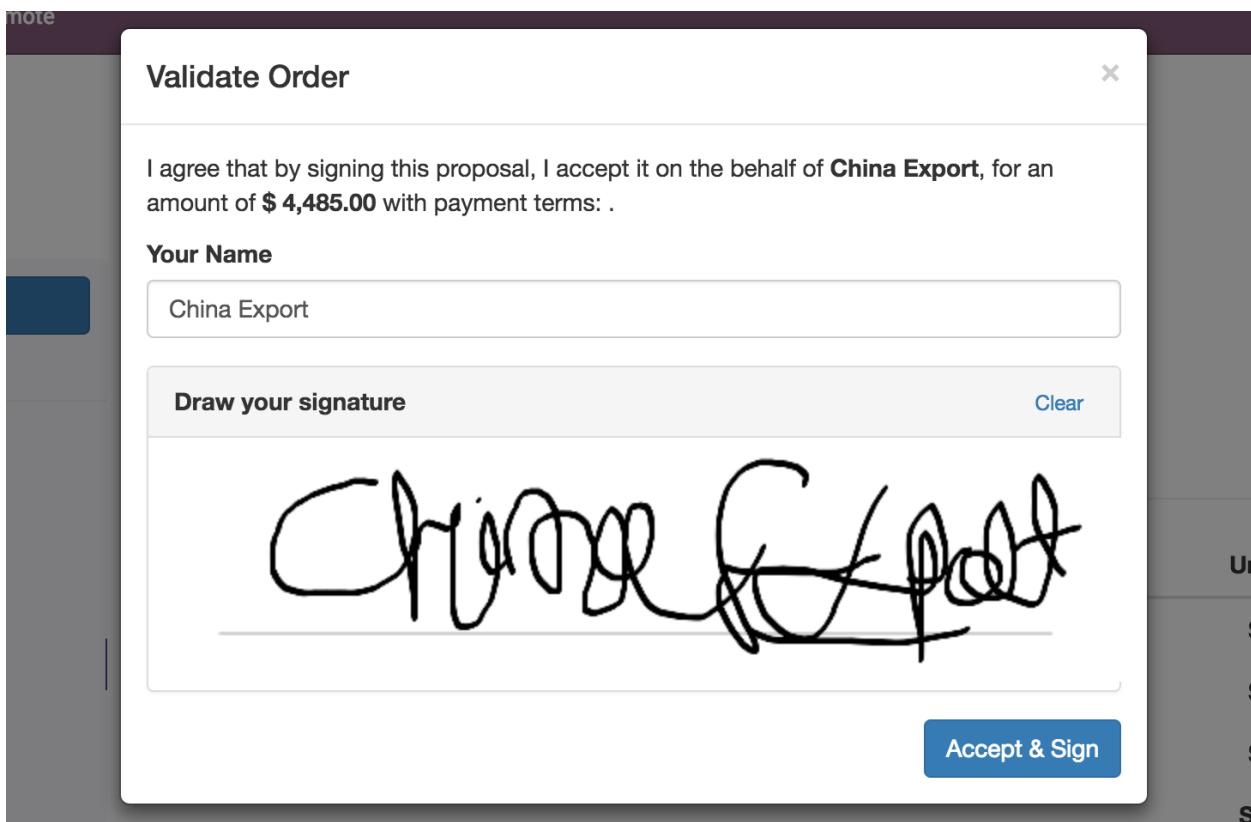
Create a quotation select customer, select quotation template. Before you send the quotation to customer make sure that **Confirmation Mode** is set to *Online signature* on quotation under the **Other Information** tab.

The screenshot shows the Odoo Sales Quotation creation interface. At the top, the reference number 'SO004' is displayed. Below it, the 'Customer' field is set to 'China Export' and the 'Quotation Template' is set to 'Offshore Projects'. The 'Expiration Date' is '08/17/2018' and the 'Payment Terms' dropdown is empty. The 'Other Information' tab is currently selected, indicated by a red box around its label. Under the 'Sales Information' section, the 'Salesperson' is 'Administrator', 'Sales Channel' is 'Sales', and 'Customer Reference' is empty. The 'Confirmation Mode' is set to 'Online Signature' (indicated by a checked blue radio button). In the 'Invoicing' section, the 'Order Date' is '07/18/2018 20:16:22' and the 'Fiscal Position' dropdown is empty.

Tip: You can change the **Confirmation Mode** for each quotation regardless of the configuration on quotation template.

Accept quotation

Customer can review the quotation online, once it suits his/her need than he/she can accept the quotation by clicking on the **Accept Order** and signing the quotation online.



The quotation accepted and signed by the customer will be confirmed and converted to sales order in backend. It will automatically triggers the next business process in backend such as creating a delivery order, manufacturing order or create a task or project in the project management depending on your configuration.

Tip: Customer can accept and sign online quotation which are not expired yet. The expiration date will be computed on quotation based on the number of days defined on quotation template in **Quotation expires after** field. However the specific **Expiration Date** can be set on the quotation manually before you send the quotation by email.

Reject quotation

The quotation will be set to **Cancelled** state in the backend once it has been rejected by the customer online, however it can be reset to draft modified and send it back to the customer when you are in negotiation process.

Video

Access the video at <https://www.youtube.com/watch?v=NBfqS4L1KQc>

4.3.4 Online customer approval and payment on quotation

Sending an online quotation can speed up the negotiation process, customer can negotiate and approve the quotation online, this can boost up your sales process and minimise the sales cycle.

Getting online approval on quotation is good but getting paid online is great, it will be really cool to get online payment from the customer along with the approval of quotation.

Business case

The service company who is selling the *Support pack* which is service offered at fixed price. As soon as customer make the online payment, they can start getting the support by sending support request. The company wants to get the online payment instead of signature from the customer to start the support service.

Configuration

Assumed that you have installed **Sales Management** application, configure the quotation template for the support packs.

Online payment

The **Confirmation Mode** on the quotation template available on the **Configuration** tab is set to *Online Signature* by default, change it to *Online Payment*. The customer have to pay online to confirm the quotation by themselves.

Accept online payment

Installing the **Sales Management** application also installed the **Invoicing** application, the payment acquire needs to be activated from the list of payment acquires (payment gateways) available in Odoo. All the payment acquires can be found and activated from **Invoicing / Configuration / Payment Acquirers**. Install and configure the payment acquirer, which suits your requirement.

I have installed and configure the *Authorised.net* payment acquirer.

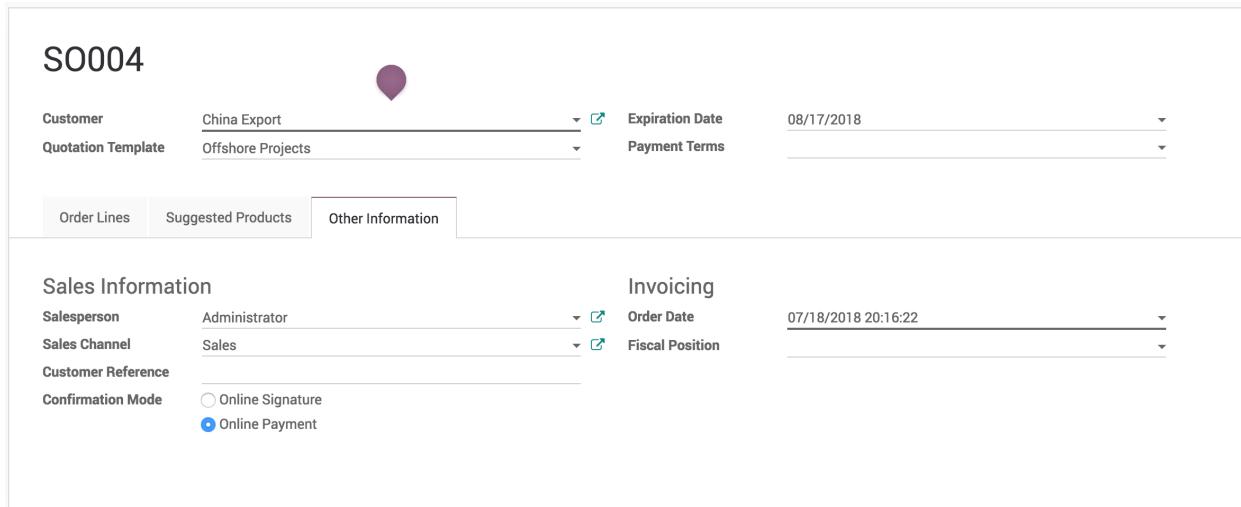


Tip: Do not forget to **Publish** configured payment acquire to force customer to pay by that and unpublish other acquire such as **Wire Transfer**.

I have also made change to **Payment Flow** from *Redirect to the acquirer website* to *Payment from Odoo* as i want to process the payment directly from Odoo without redirecting to acquirer website. You can switch to **Production** as soon as everything configured and working properly.

Create and send quotation by email

Create a quotation select customer, select quotation template. Before you send the quotation to customer make sure that **Confirmation Mode** is set to *Online Payment* on quotation under the **Other Information** tab.

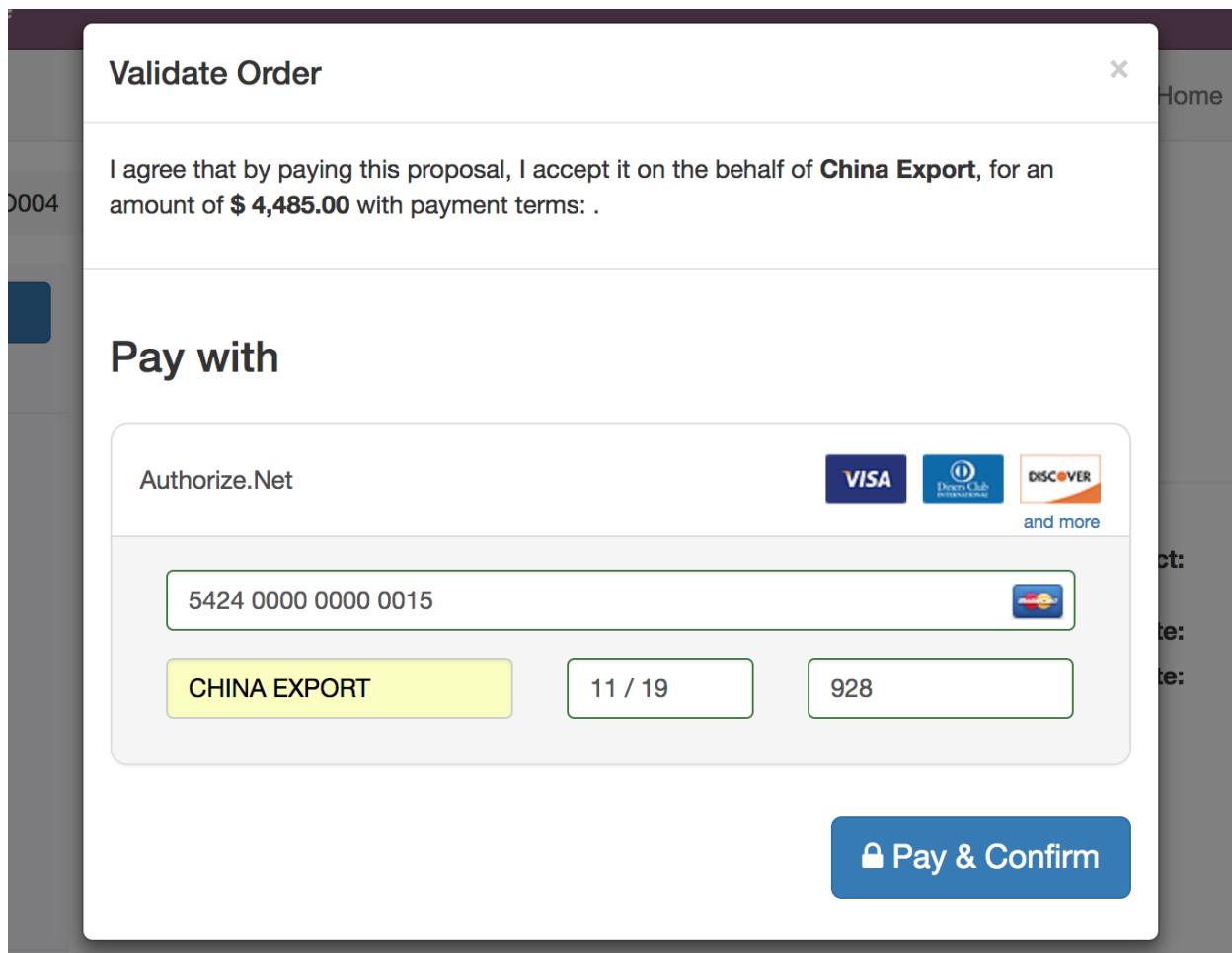


The screenshot shows the Odoo Sales Quotation creation interface. At the top, it displays the quotation number "SO004". Below the header, there are fields for "Customer" (set to "China Export") and "Quotation Template" (set to "Offshore Projects"). To the right of these fields are "Expiration Date" (set to "08/17/2018") and "Payment Terms". Below these fields is a tab navigation bar with three tabs: "Order Lines", "Suggested Products", and "Other Information". The "Other Information" tab is currently selected, indicated by a highlighted border. In the "Other Information" section, there are two main groups of fields: "Sales Information" and "Invoicing". Under "Sales Information", there are fields for "Salesperson" (set to "Administrator"), "Sales Channel" (set to "Sales"), "Customer Reference", and "Confirmation Mode". The "Confirmation Mode" field contains two radio button options: "Online Signature" (unchecked) and "Online Payment" (checked). Under "Invoicing", there are fields for "Order Date" (set to "07/18/2018 20:16:22") and "Fiscal Position".

Tip: You can change the **Confirmation Mode** for each quotation regardless of the configuration on quotation template.

Accept and pay online

Customer can review the quotation online, once it suite their need that can accept the quotation by clicking on the **Accept Order** and make the online payment on the quotation.



The quotation accepted and paid by the customer online will convert quotation to sales order in backend.

Warning: Make sure that customer has correct contract details before they process for the online payment. Some payment acquirer required complete customer details.

Tip: Customer can accept and pay online quotation which are not expired yet. The expiration date will be computed on quotation based on the number of days defined on quotation template in **Quotation expires after** field. However the specific **Expiration Date** can be set on the quotation manually before you send the quotation by email.

The quotation converted to sales order and It will automatically triggers the next business process in backend such as creating a delivery order, manufacturing order or create a task or project in the project management depending on your configuration.

The screenshot shows a Sales Order (SO004) for China Export. The customer details are: China Export, 307, Wonchai, Business Plus Street 203, Wonchai 302901, Hong Kong. The Quotation Template is Offshore Projects. The Confirmation Date is 07/19/2018 00:19:17. The Payment Terms are not explicitly listed. The order contains three items:

Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
Offshore project setup fee	Offshore project setup fee	1.000	0.000	0.000	500.00	Tax 15.00%	\$ 500.00
Project manager days	Project manager days	5.000	0.000	0.000	200.00	Tax 15.00%	\$ 1,000.00
Developer days	Developer days	20.000	0.000	0.000	120.00	Tax 15.00%	\$ 2,400.00

Terms and conditions specific to the offshore projects.

Untaxed Amount: \$ 3,900.00
Taxes: \$ 585.00
Total: \$ 4,485.00

The Transaction is attached to the confirmed sales order, you can click on the transaction and get the status and reference about the online payment made by customer. It is set to **Done** and **Acquirer Reference** number is available on the transaction when payment was successfully processed.

The transaction status steps are: DRAFT > PENDING > AUTHORIZED > DONE > REFUNDING > REFUNDED > ERROR > CANCELED.

Reference	SO004	Acquirer	Authorize.Net
Amount	4,485.00 USD	Payment Token	XXXXXXXXXXXX0015 - CHINA EXPORT
Fees	0.00	Acquirer Reference	60106098004
Customer	China Export 307, Wonchai, Business Plus Street 203 Wonchai 302901 Hong Kong	Creation Date	07/19/2018 00:19:15
		Validation Date	07/19/2018 00:19:17

Message

Reject quotation

The quotation will be set to **Cancelled** state in the backend once it has been rejected by the customer online, however it can be reset to draft modified and send it back to the customer when you are in negotiation process.

Video

Access the video at <https://www.youtube.com/watch?v=MJZevBuebyM>

4.4 Product and Pricing

4.4.1 Apply discount on quotation

Allowing discounts on quotations is a common sales practice to improve the chances to convert the prospect into a customer, adding discounts on the quotation encourage the prospect to close the deal quickly.

Business case

My company would like to send a quotation for an *iPad Mini* at a sales price of *320 USD* per *iPad* at a **5% discounted** price.

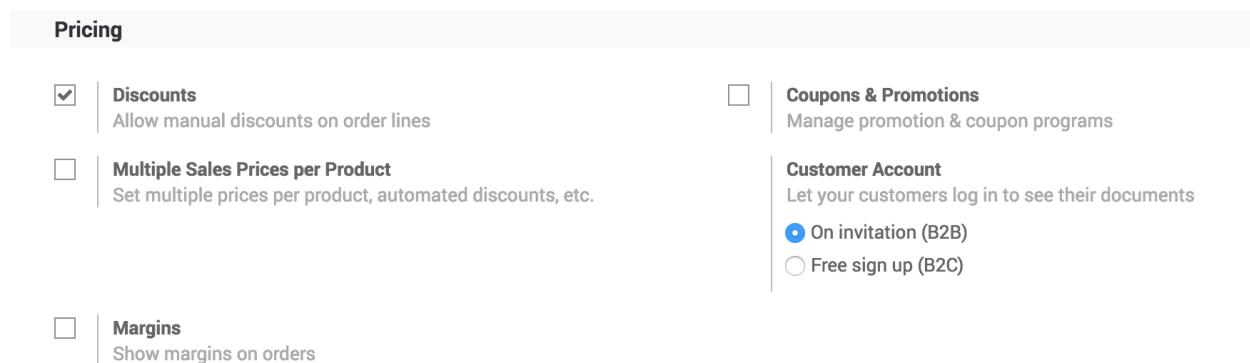
Configuration

Assumed that the **Sales Management** application installed.

Discounts

In this business case, we would like to offer **5%** discount to our customer on the sale price.

Discounts feature can be activated from **Configuration / Settings**, under the **Pricing** section.



Create a quotation

Quotation can be created from **Sales / Order / Quotations**, click on **CREATE** button to create a new quotation, select customer and add product *iPad Mini* on the quotation, the default price you will see is **320\$**.

Apply discount

By default the discount will not be applied as we choose to apply manual discount, to apply **5% discount** enter **5** in the **Discount (%)** field for *iPad Mini* product in the sales order line.

Tip: The discount should be entered between 0 to 100, it computes discount in percentage. The price will change automatically when you enter the discount.

SO005

Customer: China Export Expiration Date:

Quotation Template:

Order Lines	Suggested Products	Other Information				
Product	Description	Ordered Qty	Unit Price	Taxes	Discount (%)	Subtotal
<input type="checkbox"/> iPad Mini	iPad Mini	320.000	1.00	Tax 15.00%	5.00	\$ 304.00
Add an item						

Setup default terms and conditions in your sales settings ...

Untaxed Amount:	\$ 304.00
Taxes:	\$ 45.60
Total:	\$ 349.60

Printing quotation

Discount column will be appeared on the quotation when you have applied discount on any of the product on quotation. Don't be surprised if you don't see the discount column on the quotation, which means that you have not applied discount on any of the product on quotation as you don't want to offer discount to your customer.

Tip: All the taxes applicable on the product will be computed on the discounted product price (i.e. Taxes will be computed on **Subtotal**)

Video

Access the video at <https://www.youtube.com/watch?v=tq3e17Ccjkx>

4.4.2 Adapt product price based on customer segment (e.g. Retailer or Distributor)

Sales and distribution business works on the margin basics, the percentage of margin are fixed for the distributors based on their turnover. The MRP of the product is decided included the margins for the retailers, stockist, distributors. In this section you will see how pricelist can help you to achieve to define the product price based on the customer type (retailer and distributors).

Business case

The *My Company* sells the electronic products such as *Computers*, *Laptops*, and *Printers*, they want to set up the pricing rules for their *Retailer* and *Distributors*. The price they would like to offer are as below:

Product	Sales Price (MRP)	Distributors (Price)	Retailer (Price)
Laptops	1099	900	999
Desktop	999	740	799
Printer	499	330	399
Tablet	799	620	699

Configuration

Assumed that the **Sales Management** application installed, let's see what are the other configuration you have to do before you execute the business case.

Pricelist

To setup the customer segment specific price you have to enable the feature called **Multiple Sales Prices per Product** available under the **Sales / Configuration / Settings**. Keep the default option selected **Multiple prices per product (e.g. customer segments, currencies)** under the **Sales Pricelist** option, using that you can define the customer segment specific pricelist.

Pricing

- Discounts**
Allow manual discounts on order lines
- Coupons & Promotions**
Manage promotion & coupon programs
- Multiple Sales Prices per Product**
Set multiple prices per product, automated discounts, etc.
 - Multiple prices per product (e.g. customer segments, currencies)**
 - Prices computed from formulas (discounts, margins, roundings)
- Customer Account**
Let your customers log in to see their documents
 - On invitation (B2B)
 - Free sign up (B2C)
- Margins**
Show margins on orders

Product

Let's create the products you are selling, to create the products go to **Sales / Catalog / Products**, create a product, enter the **Name**, set **Image** and **Sales Price**, the customer specific price you can define under the **Sales** tab.

Product Name	Image	Sales	Active
Laptop		\$ 0 Sales	Active

General Information

Laptop

Can be Sold
 Can be Purchased

Sales **Invoicing** **Notes**

Pricing

Pricelist	Price	Min. Quantity	Start Date	End Date
Distributor Pricelist (USD)	900.00	1		
Retailer Pricelist (USD)	999.00	1		
Distributor Pricelist (USD)	790.00	5		

Create and Edit...

Create a pricelist if not created before, enter the name of the pricelist (i.e. Retailer Pricelist) and click on **Create “Retailer Pricelist”** link, enter the **Price** and **Min. Quantity**, keep the Min. Quantity to 1 by default if you don't want to put the constraint on the minimum order quantity.

You can create a multiple lines for the same pricelist (i.e. *Distributor Pricelist*) in case you want to offer a special price to the distributor, when they buy more than 1 quantity. (i.e. **Distributors** can get the *Laptop* at 790 price, if they order minimum 5 or more quantities)

The **Start Date** and **End Date** is used to limit the offer for a specific dates, assume that you want to offer a special price for the Christmas (i.e. **Start Date** to *20/12/2018* and **End Date** to *31/12/2018*)

Customer

The customers can be defined as a distributor or retailer by setting the specific pricelist on them. Pricelist can be set on the customer form under the **Sales & Purchases** tab.

The screenshot shows the Odoo Customer form for a company named "China Exporters". The top bar includes buttons for Customer Ledger, Sales (1), Active, and Invoiced. Below the title, there are tabs for Individual and Company, with Company selected. The main form fields include:

- Address:** Street..., Street 2..., City, State, ZIP, Country.
- TIN:** e.g. BE0477472701.
- Tags:** Tags... dropdown.
- Phone:** Mobile, Email, Website, Language (English).
- Image:** A placeholder for a company logo, showing a red silhouette of a person's head.

Below the address section, there are tabs for Contacts & Addresses, Internal Notes, Sales & Purchases (which is currently selected), and Invoicing.

Sale: Is a Customer (checkbox checked), Sale Pricelist (dropdown set to Distributor Pricelist (USD)), Misc (Internal Reference, Industry).

Purchase: Is a Vendor (checkbox unchecked).

Payments: 0 Bank account(s), 0 Credit card(s).

A dropdown menu for the Sale Pricelist shows options: Public Pricelist (USD), Retailer Pricelist (USD), Distributor Pricelist (USD), and Create and Edit... (highlighted).

Create sale order

Let's send a quotation to your customer, create the quotation from **Sales / Orders / Quotation**, depending on the customer the pricelist will be set on the quotation and the product price will be appeared accordingly, when you add products on the quotation.

New

Customer	China Exporters	Expiration Date			
Pricelist	Distributor Pricelist (USD)				
Payment Terms					
<input checked="" type="checkbox"/> Order Lines <input type="checkbox"/> Other Information					
Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
⊕ Laptop	Laptop	10.000	790.00	Tax 15.00%	\$ 7,900.00
Add an item					
Setup default terms and conditions in your sales settings ...					
Untaxed Amount: \$ 7,900.00 Taxes: \$ 1,185.00 Total: \$ 9,085.00					

Create a quotation for *China Export* (Distributor), add 50 quantity of Laptop, the special price 790/unit applied as we prepare the quotation for more than 5 quantity.

Tip: Pricelist can be changed on the quotation after selecting a customer. The pricelist selected on the quotation have the higher priority over the pricelist assigned to the customer.

Now, a salesman can create quotations quickly regardless of the customer type and price offered to them, of course a correct pricelist have to be configured when you create customer, it can be reviewed later depending on the turnover.

Video

Access the video at <https://www.youtube.com/watch?v=MKStY2Tt1l0>

4.4.3 Adapt product price based on customer country or location (e.g. Price in € or \$)

An international sales and distribution business network required accurate price conversion or the price rules according to the customer's country. During quotation process some business prefer to have the rate conversion while some business wants to define the price based on the geographic locations irrespective of currency conversion. You can configure both business case using the pricelist.

Business case

Odoo wants to apply pricing rules for the customer irrespective of the currency conversion based on the customer location. They divide whole world into three different region and specific price for each region.

Product	America (USD)	Europe & Middle East (EUR)	ASIA (USD)
Odoo Enterprise (Users)	28	24	16

Configuration

Assumed that the **Sales Management** application installed, **Invoicing** application will be installed as an dependant of the sales application.

Multi Currency

You need a multiple currency support, to prepare a quotation in foreign currency. **Multi-Currencies** feature can be activated from **Invoicing / Configuration / Settings** available under the **Currencies** section.

Main Currency	<input checked="" type="checkbox"/> Multi-Currencies
Main currency of your company	Record transactions in foreign currencies
Currency	USD
Automatic Currency Rates	
Update exchange rates automatically	
Service	European Central Bank
Interval	Manually
Next Run	(cron icon)

Tip: Select **Automatic Currency Rate** to get the accurate currency conversion rate when you do want a currency conversion to prepare the quotation, set *Daily* for the **Internal** field, the rate can be updated from different exchange services such as *European Central Bank, Federal Tax Administration or Mexican Bank*.

Pricelist

To setup the price based on the customer segment or country, you have to enable the **Multiple Sales Prices per Product** feature available under the **Sales / Configuration / Settings** under the **Pricing** section. Keep the default option **Multiple prices per product (e.g. customer segments, currencies)** selected under the **Sales Pricelist** option.

Pricing

- | | |
|--|--|
| <input type="checkbox"/> Discounts
Allow manual discounts on order lines | <input type="checkbox"/> Coupons & Promotions
Manage promotion & coupon programs |
| <input checked="" type="checkbox"/> Multiple Sales Prices per Product
Set multiple prices per product, automated discounts, etc. | |
| Multiple prices per product
<input checked="" type="radio"/> (e.g. customer segments, currencies)
Prices computed from
<input type="radio"/> formulas (discounts, margins, roundings) | |
| → Pricelists | |
| <input type="checkbox"/> Margins
Show margins on orders | |

To create a new pricelist goto **Sales / Catalog / Pricelist**, create a three different pricelist, set the **Currency** field on each pricelist. Let's create a pricelist for european and middle east customers where we offer the price in EUR (€).

Enter **EMEA Pricelist** in the **Name** field, select **EUR** in the **Currency** field and add the **Europe** in the **Country Group** field.

Note: The country group is used to assign pricelist automatically when customer is being created. So, even if your salesman forgot to assign pricelist the system will assign automatically when customer's country is set on the customer.

Product

Let's create the product **Laptop**, goto **Sales / Catalog / Products** to create the product, enter **Name**, set **Image** and **Sales Price**, the country specific price or currency specific price can be defined under the **Sales** tab.

The screenshot shows the Odoo Product Form for 'Enterprise Contract (User)'. At the top right, there are status indicators: '\$ 0 Sales' and 'Active'. Below the title, there are two checked checkboxes: 'Can be Sold' and 'Can be Purchased'. A green icon representing a building or contract is displayed. The tabs at the bottom are 'General Information' (selected), 'Sales', 'Invoicing', and 'Notes'. In the 'Pricing' section, there is a table with columns: Pricelist, Price, Min. Quantity, Start Date, and End Date. It lists two entries: 'Public Pricelist (USD)' with a price of 24.00 and 'EMEA Pricelist (EUR)' with a price of 18.00. Both entries have a quantity of 1. There is also a link 'Add an item'.

Pricelist	Price	Min. Quantity	Start Date	End Date
Public Pricelist (USD)	24.00	1		
EMEA Pricelist (EUR)	18.00	1		
Add an item				

Select the Pricelist and enter the Price, the price entered is respective of the currency defined on the pricelist (i.e. in this case we have defined 24 USD and 18 EUR).

You can create multiple lines for the same pricelist, in case you want to offer a special price to customers, when they buy more than 1 quantity.

The **Start Date** and **End Date** is used to limit the offer for a specific dates, assume that you want to offer a special price for the *Christmas* (i.e. **Start Date** to *20/12/2018* and **End Date** to *31/12/2018*)

Customer

Create a customer, enter the name, city, country and other contact details such as email and mobile and save the customer detail, as soon as you save the customer the pricelist will be assigned on the customer automatically based on the customer's country, review the pricelist set on the customer form under the **Sales & Purchases** tab.

<input type="radio"/> Individual	<input checked="" type="radio"/> Company		Customer Ledger		\$ 1 Sales		Active		\$ 0.00 Invoiced
China Exporters									
Address		Street...	Phone						
		Street 2...	Mobile						
Paris		State	Email						
France		ZIP	Website						
TIN	e.g. BE0477472701			Language	http://chinaexporters.xyz				
Tags	Tags...			English					
Contacts & Addresses		Internal Notes	Sales & Purchases	Invoicing					
Sale			Purchase						
Is a Customer <input checked="" type="checkbox"/>			Is a Vendor <input type="checkbox"/>						
Salesperson									
Sale Pricelist EMEA Pricelist (EUR)									
Misc			Payments						
Internal Reference			0 Bank account(s)						
Industry			0 Credit card(s)						

However, you can change it manually, if system detect wrong pricelist, you may choose same country on more than one country group which was assigned to different pricelists.

Create a quotation

Let's send a quotation to your european customer, create the quotation from **Sales / Orders / Quotation**, pricelist will be set on the quotation and currency of the quotation will be changed accordingly, the product price will be appeared accordingly, when you add products on the quotation.

New									
Customer	China Exporters			Expiration Date					
Order Lines	Other Information								
Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal				
Enterprise Contract (User)	Enterprise Contract (User)	10.000	18.00	Tax 15.00% x	180.00 €				
Add an item									
Setup default terms and conditions in your sales settings ...									
Untaxed Amount: 180.00 € Taxes: 27.00 € Total: 207.00 €									

Create a quotation for *China Export*, add 10 quantity of *Enterprise Contract (Users)*, 14 EUR /user applied as we

prepare the quotation in EUR currency.

Now, a salesman can create quotations quickly regardless of the customer type and price offered to them, of course a correct pricelist have to be configured when you create customer, it can be reviewed later depending on the turnover.

Price based on currency conversion

Remove all the lines on the product **Pricing** and set correct **Sales Price** on the product form.

The screenshot shows the Odoo Product Form for 'Enterprise Contract (User)'. At the top right, there are icons for Sales (\$ 0) and Active status. Below the title, there are two checked checkboxes: 'Can be Sold' and 'Can be Purchased'. The tab bar includes General Information, Sales, Invoicing, and Notes, with General Information selected. Under Product Type, 'Consumable' is chosen. Category is set to 'All'. Under Internal Reference, there is a barcode field. The Sales Price is listed as \$24.00, and Cost is \$0.00. A green icon of a building is displayed on the right.

The price defined on the product is respective to the company currency (USD). Let's create a quotation for the same customer and see what price will be proposed by the pricelist.

The screenshot shows the Odoo Sales Quotation Form for Sales Order SO003. The customer is set to 'China Exporters'. The pricelist is 'EMEA Pricelist (EUR)'. The payment terms dropdown is empty. The Order Lines tab is active, showing one item: 'Enterprise Contract (User)' with a quantity of 1.000, unit price of 20.40, and taxes applied (Tax 15.00% x). The subtotal is 20.40 €. The Other Information tab is also visible. At the bottom, there are setup notes for default terms and conditions, and a summary table showing Untaxed Amount (20.40 €), Taxes (3.06 €), and Total (23.46 €).

Video

Access the video at <https://www.youtube.com/watch?v=YMXc4W5cHNg>

4.4.4 Compute and apply discount automatically based on the pricelist

Allowing discounts on quotations is a common sales practice to improve the chances to convert the prospect into a customer, when you are not offering discount to all the customers, keep it manual and offer when customer demands. In case you have to apply discount for specific customer or products every time, it is quite difficult for salesman to remember those products or customer and apply the discount manually on each quotation.

Business case

The trading company “*My Company*” manufactures the *Computer Desk* and selling to their distributors and to retail customers.

They sell to retail customer at a public price of 3200 but when they sell to distributors the price would be 2240, and they show the percentage of the discount which was offered on the public price.

Configuration

Assumed that you have installed the **Sales Management** application.

Discount

By applying discount on the quotation, the product price will get decreased, the discount will be visible to the customer on quotation, this will encourage the customer to close the deal quickly.

The discount feature has to be enabled to show the percentage of the discount offered to the customer on quotation, it can be activated from **Sales / Configuration / Settings**.

Product Pricing

You need a pricelist to apply the product price based on the business rules such as discount or periodically price variations for a product(s). Let's go to **Sales / Configuration / Settings** and activate the **Multiple Sales Prices per Product options** as of now we will keep the **Multiple prices per product** (e.g. **customer segments, currencies**) option selected by default.

Let's create a *Distributor Pricelist*, the Public Pricelist available as a default, the pricelist can be accessed from **Sales / Catalog / Pricelists**. Create pricelist name it as *Distributor Pricelist* and change the **Discount Policy** to *Show public price & discount to the customer*.

Pricelists / New

SAVE **DISCARD**

The screenshot shows the Odoo Pricelist creation interface. At the top right, there is a status bar with a 'Active' button. Below it, the title 'Distributor Pricelist' is displayed. Under 'Discount Policy', the option 'Show public price & discount to the customer' is selected. In the 'Country Groups' section, there is a 'Name' field containing 'Add an item' and a large empty text area below it.

The discount policy decides, whether the discount will be computed based on the pricelist and will be visible to customer on quotation or not. When you choose *Discount included in the price* the product price will be computed by applying the discount (%) and discount will not be visible to customer on quotation.

Tip: The *Discount included in the price* option can be used to apply the price variation such as commodity price, it may decrease or increased.

Create a product

Let's create the product and define the pricing rules so depending on the customer the price will be applied automatically. The **Pricing** rules can be applied under the **Sales** tab on product form.

The screenshot shows the Odoo Product creation interface. At the top right, there is a status bar with '\$ 0 Sales' and an 'Active' button. The product name is 'Computer Desk'. Under 'General Information', the checkboxes 'Can be Sold' and 'Can be Purchased' are checked. Below the tabs 'General Information', 'Sales' (which is active), 'Invoicing', and 'Notes', the 'Pricing' section is shown. It lists two pricelists: 'Distributor Pricelist (USD)' with a price of 2,240.00 and 'Public Pricelist (USD)' with a price of 3,200.00. There is also an 'Add an item' button.

I have created two pricing rules, one for *Distributor Pricelist* and another for *Public Pricelist*. The customer which do not comes under any of those pricing rules the **Sales Price** defined on the product will be applied in that case.

Create a customer

Create a customer *China Export* of type distributor, we will offer the *Computer Desk* to them at a special price.

The screenshot shows the Odoo interface for creating a new customer record. At the top, there are several status indicators: 'Customer Ledger' (edit icon), '\$ 0 Sales' (edit icon), 'Active' (checkbox), and '\$ 0.00 Invoiced' (edit icon). Below these are two radio buttons: 'Individual' (unchecked) and 'Company' (checked). The company name 'China Export' is entered in the 'Name' field, which also features a small icon of three buildings.

Address: Fields for Street, Street 2, City, State, ZIP, Country, and TIN (e.g., BE0477472701). There is also a 'Tags...' dropdown.

Phone: Fields for Phone, Mobile, Email, Website (e.g., www.odoo.com), and Language (English).

Sale: 'Is a Customer' checkbox is checked. 'Salesperson' and 'Sale Pricelist' (set to 'Distributor Pricelist (USD)') are dropdown fields.

Purchase: 'Is a Vendor' checkbox is unchecked.

Misc: 'Internal Reference' and 'Industry' dropdown fields.

Payments: Shows 0 Bank account(s) and 0 Credit card(s).

At the bottom, tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases' (selected), and 'Invoicing' are visible.

To define this customer as a distributor, select the *Distributor Pricelist (USD)* in **Sales Pricelist** field available under the **Sales & Purchase** tab.

Create a quotation

Create a quotation from **Sales / Orders / Quotations**, select the *China Export* as a customer, a *Distributor Pricelist (USD)* will be selected automatically on the quotation. Now add the product *Computer Desk* on the order lines, **Unit Price** will be set to **3200** but **Subtotal** computed and shows **2240** as an automatic **30%** discount computed and set on the **Discount** field based on the *Distributor Pricelist*.

SO002

Customer	John Doe	Expiration Date				
Pricelist	Distributor Pricelist (USD)					
Payment Terms						
<input checked="" type="checkbox"/> Order Lines <input type="checkbox"/> Other Information						
Product	Description	Ordered Qty	Unit Price	Taxes	Discount (%)	Subtotal
Computer Desk	Computer Desk	1.000	3,200.00		30.00	\$ 2,240.00
Add an item						
Setup default terms and conditions in your sales settings ...						
Untaxed Amount: \$ 2,240.00 Taxes: \$ 0.00 Total: \$ 2,240.00						

The 30% is computed based on the difference between price offered to distributors and the product **Sales Price**. I.e. $3200 - 2240 = 960$ which is 30% of the 3200 price.

Video

Access the video at <https://www.youtube.com/watch?v=J41EpiT0a5g>

4.4.5 Compute sell price and margin based on product cost price (AVCO costing method)

The most common business case where you want to decide the sell price based on your cost of the product purchase price.

Business case

The **My Company** is a distributor of *Laptop*, they purchase a laptop from the default supplier and sell to retail customers, there are sometimes frequent price changes, so **My Company** wants to set up the inventory costing and based on cost they can define the product and add 35% margin and sell to their customers.

Configuration

- Install **Sales Management**, **Purchase Management & Accounting** and **Finance** apps
- Create a product *Laptop*
- Set the Internal Category to *All / Saleable*
- Set **Costing Method** to *Average Cost (AVCO)* on *All / Saleable* category
- Define *Default Supplier* as a vendor with the cost price of *Laptop*.
- Activate the **Multiple Sales Prices per Product** and **Margins** under the **Sales / Configuration / Settings**.
- Change existing price list *Public Pricelist* and add new pricelist item, they increase the Laptop price by 35%.

Video

Access the video at <https://www.youtube.com/watch?v=t2P70HKk3rE>

4.4.6 Define the product sales price per company

Video

Access the video at <https://www.youtube.com/watch?v=MCnwS0ZVrM8>

4.5 Sales Margin

4.5.1 Compute margin on sale order

Some business wants the realtime computation of the margins so that sales manager or person can propose the best price to the customer.

Let's take the business case, sales manager check the margin on order and decide whether we can allow additional discount to the customer or not.

Configuration

Install the **Sales Management** application.



Note: If you want to check Margin feature for *Average Cost (AVCO)* install **Purchase Management**. Installation of sales and purchase will install other applications such as **Inventory Management** and **Invoicing Management**.

Margins

Go to Sales / Configuration / Settings select **Margins** and apply the setting. This will show margins on orders.

Pricing

- | | |
|---|--|
| <input checked="" type="checkbox"/> Discounts
Allow manual discounts on order lines | <input type="checkbox"/> Coupons & Promotions
Manage promotion & coupon programs |
| <input type="checkbox"/> Multiple Sales Prices per Product
Set multiple prices per product, automated discounts, etc. | Customer Account
Let your customers log in to see their documents |
| <input checked="" type="radio"/> On invitation (B2B)
<input type="radio"/> Free sign up (B2C) | |
| <input checked="" type="checkbox"/> Margins
Show margins on orders | |

Products

Enter the product **Sales Price** and **Cost** accordingly, enter the latest sales and cost price.

On Hand	Forecasted	Product Moves	Sales	Min: 0.00	Purchases	Active																														
0	0		\$ 9	Min: 0.00	2																															
Product Name Laptop <div style="float: right; margin-top: -20px;">  </div> <div style="clear: both; margin-top: 10px;"> <input checked="" type="checkbox"/> Can be Sold <input checked="" type="checkbox"/> Can be Purchased </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 15%;">General Information</td> <td style="width: 15%;">Sales</td> <td style="width: 15%;">Purchase</td> <td style="width: 15%;">Inventory</td> <td style="width: 15%;">Invoicing</td> <td style="width: 15%;">Notes</td> </tr> <tr> <td>Product Type</td> <td>Stockable Product</td> <td></td> <td></td> <td style="text-align: right;">Sales Price \$1,200.00</td> <td></td> </tr> <tr> <td>Category</td> <td>All / Saleable</td> <td></td> <td></td> <td style="text-align: right;">Cost \$900.00</td> <td></td> </tr> <tr> <td>Internal Reference</td> <td colspan="5"></td> </tr> <tr> <td>Barcode</td> <td colspan="5"></td> </tr> </table>							General Information	Sales	Purchase	Inventory	Invoicing	Notes	Product Type	Stockable Product			Sales Price \$1,200.00		Category	All / Saleable			Cost \$900.00		Internal Reference						Barcode					
General Information	Sales	Purchase	Inventory	Invoicing	Notes																															
Product Type	Stockable Product			Sales Price \$1,200.00																																
Category	All / Saleable			Cost \$900.00																																
Internal Reference																																				
Barcode																																				

I have entered \$1200 sales price and \$900 cost price, also defined the \$900 purchase price on the vendor pricelist.

Tip: Product **Cost** will be computed automatically when you set the product costing method to *Average Cost (AVCO)* or *First in First Out (FIFO)*. The FIFO method does not give you correct costing in some case.

Create Sales order

Let's create a quotation, select the customer on quotation and product on order line. The margin will be computed as soon as you select the product, the difference between **Unit Price** and **Cost** is margin. The **Margin** be computed based on the difference for each lines on sale order.

The screenshot shows the Odoo Sales Quotation interface for quotation SO004. The top section includes fields for Customer (Retail Customer), Expiration Date, and Payment Terms. Below this is a table with two tabs: 'Order Lines' (selected) and 'Other Information'. The 'Order Lines' tab displays a single item: a Laptop with a quantity of 1.000, a Unit Price of \$1,200.00, and a Cost of \$800.00. A red box highlights the Unit Price and Cost columns. The 'Other Information' tab shows a summary: Untaxed Amount (\$1,200.00), Taxes (\$0.00), Total (\$1,200.00), and Margin (\$400.00). A red arrow points from the highlighted cost value in the table to the Margin value in the summary.

Product	Description	Ordered Qty	Unit Price	Cost	Taxes	Discount (%)	Subtotal
Laptop	Laptop	1.000	1,200.00	800.00		0.00	\$ 1,200.00

Setup default terms and conditions in your sales settings ...

Untaxed Amount:	\$ 1,200.00
Taxes:	\$ 0.00
Total:	\$ 1,200.00
Margin:	\$ 400.00

Now, it will be easy for the sales manager to check what's the margin on quotation. For **SO004** it is 25%, its a good deal to go with, let's move forward and confirm the order.

Video

Access the video at <https://www.youtube.com/watch?v=GzhZi2296Z8>

4.6 Unit of Measure

4.6.1 Sale and purchase in different unit of measure

Video

Access the video at <https://www.youtube.com/watch?v=x33djiothAc>

4.6.2 How to sell and purchase products in different units of measure, and apply better pricing?

Video

Access the video at https://www.youtube.com/watch?v=Ui6_-GInV9w

4.7 Product and Tax

4.7.1 How to manage prices for Business to Customer (tax included)?

Video

Access the video at <https://www.youtube.com/watch?v=SRsMh0vqM2w>

4.7.2 How to manage product prices for B2B (tax excluded) and B2C (tax included)?

Video

Access the video at <https://www.youtube.com/watch?v=S6yNzHBEyOI>

4.8 Invoicing

4.8.1 Send Pro-Forma Invoice to your customers

Video

Access the video at <https://www.youtube.com/watch?v=4ew-PmcTdmo>

4.8.2 Create Invoice for the ordered quantity

Video

Access the video at <https://www.youtube.com/watch?v=7bXoYgFEyxc>

4.8.3 Create Invoice based on the delivered quantity, when inventory app is not installed

Video

Access the video at <https://www.youtube.com/watch?v=KWzwLfzqhnw>

4.8.4 Create credit note from sales order, when customer return the product

Video

Access the video at <https://www.youtube.com/watch?v=uJgz8Bx5xqk>

4.8.5 How to create single invoice from multiple sales orders?

Video

Access the video at <https://www.youtube.com/watch?v=oU-qvZ7Ly7I>

4.9 Delivery Charges

4.9.1 Free delivery if order total is more then \$2000

Odoo can handle various delivery methods, but it is not activated by default. Delivery methods can be used for normal sale or you can also use for your e-commerce order.

Delivery methods allow you to manage the transport company, the price and the destination.

Tip: You can even integrate Odoo with external shippers to compute the real price and the packagings.

Configuration

Activate the Shipping Costs feature from Sales / Configuration / Settings.

Shipping

- Shipping Costs**
Compute shipping costs on orders
- Incoterms**
Display incoterms on orders & invoices
- UPS**
Compute shipping costs and ship with UPS
- FedEx**
Compute shipping costs and ship with FedEx
- bpst**
Compute shipping costs and ship with bpst
- Delivery Date**
Manage delivery dates from sales orders
- Order-Specific Routes**
Apply special routes from orders (e.g. dropshipping, MTO)
- DHL USA**
Compute shipping costs and ship with DHL
- USPS**
Compute shipping costs and ship with USPS
- Easypost**
Compute shipping costs and ship with Easypost

Note: Activating the Shipping Costs will install the Inventory application if it was not installed previously.

Setup the delivery charges

Let's assume that you deliver the product at fixed \$50 and you deliver for free when total order value is more than \$2000.

Name	Delivery charges
Provider	<input checked="" type="radio"/> Fixed Price <input type="radio"/> Based on Rules Install more Providers
Margin on Rate	<input checked="" type="checkbox"/> Free if order amount is above <input type="text"/> 2,000.00 Delivery Product
Pricing	<input type="text"/> 50.00
Destination Availability	

Goto Sales / Configure / Delivery Methods rename the existing method *Free delivery charges* to *Delivery charges* add the \$50 in the **Fixed Price**.

Tip: If you have a multiple delivery methods having a fixed price, please create a separate Delivery Product for each method.

Setup product price

Do not forget to add the correct product price when creating the products.

The screenshot shows the Odoo Product creation interface. A Laptop product has been created with the following details:

- Product Name:** Laptop
- Can be Sold:** checked
- Can be Purchased:** checked
- General Information:** Sales Price: \$1,250.00
- Product Type:** Consumable
- Product Category:** All
- Internal Reference:** (empty)
- Barcode:** (empty)
- HS Code:** (empty)
- Sales Price:** \$1,250.00
- Customer Taxes:** (Tax 15.00% x)
- TaxCloud Category:** (empty)
- Cost:** \$950.00

Adding delivery cost to the quotation

You can now choose the Delivery Method on your sale order. If you want to invoice the price of the delivery charge on the sale order, click on Set price, it will add a line with the name of the delivery method as a product.

The screenshot shows the Odoo Sale Order creation interface for order SO002. The order details are as follows:

- Customer:** (1) Customer
- Delivery Method:** (3) Delivery charges (\$0.00)
- Delivery charges:** \$0.00 (4) (Info: The shipping is free because the order amount exceeds 2000.00. (The actual shipping cost is: 50.00))
- Order Lines:**

Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Laptop (2)	Laptop	1.000	1,250.00	(Tax 15.00%)	\$ 1,250.00
Mobile	Mobile	1.000	850.00	(Tax 15.00%)	\$ 850.00
[Delivery] Delivery charges	Delivery charges	1.000	0.00	(Tax 15.00%)	\$ 0.00
- Other Information:**
 - Untaxed Amount: \$ 2,100.00
 - Taxes: \$ 315.00
 - Total: \$ 2,415.00

Video

Access the video at <https://www.youtube.com/watch?v=JPpUPbTeJD0>

4.9.2 Calculate shipping rates based on product weight

Odoo can handle various delivery methods, but it is not activated by default. Delivery methods can be used for normal sale or you can also use for your e-commerce order.

Delivery methods allow you to manage the transport company, the price and the destination.

Tip: You can even integrate Odoo with external shippers to compute the real price and the packagings.

Configuration

Activate the Shipping Costs feature from Sales / Configuration / Settings.

Shipping	
<input checked="" type="checkbox"/> Shipping Costs	Compute shipping costs on orders
→ Delivery Methods	
<input type="checkbox"/> Incoterms	Display incoterms on orders & invoices
<input type="checkbox"/> UPS	Compute shipping costs and ship with UPS
<input type="checkbox"/> FedEx	Compute shipping costs and ship with FedEx
<input type="checkbox"/> bpost	Compute shipping costs and ship with bpost
<input type="checkbox"/> Delivery Date	Manage delivery dates from sales orders
<input type="checkbox"/> Order-Specific Routes	Apply special routes from orders (e.g. dropshipping, MTO)
<input type="checkbox"/> DHL USA	Compute shipping costs and ship with DHL
<input type="checkbox"/> USPS	Compute shipping costs and ship with USPS
<input type="checkbox"/> Easypost	Compute shipping costs and ship with Easypost

Note: Activating the Shipping Costs will install the Inventory application if it was not installed previously.

Setup the delivery charges

Let's assume that you deliver the product to your customer through postal service and the service charges you based on weight. Postal service deliver to all over the USA at \$20 fixed rates if the weight upto 1kg, when weight is above 1kg, they charge \$8 for every 1kg.

Name ①
Postal Delivery

Provider
② Fixed Price Based on Rules [Install more Providers](#)

Margin on Rate
 Free if order amount is above
Delivery Product
0 %
[Delivery] Delivery charges ③

Pricing **Destination Availability**

④ Name
+ if weight <= 1.0 then fixed price 20.0
+ if weight > 1.0 then 8.0 times weight
[Add a line](#)

Goto Sales / Configure / Delivery Methods and create a new method *Postal Delivery*, select **Based on Rule** for **Provide** as the delivery cost is based on the weight and create a two rules.

Open: Pricing Rules

Condition	Weight	<=	1.00
Delivery Cost	20.00	+ 0.00	* Weight

SAVE & CLOSE **SAVE & NEW** **DISCARD**

Setup product weight

Do not forget to add the correct product weight while creating the products.

Product Name
Laptop

Can be Sold
 Can be Purchased

General Information **Sales** **Purchase** **Inventory**

Product Type Consumable **Sales Price** \$1,250.00
Product Category All **Customer Taxes** Tax 15.00%
Internal Reference
Barcode
HS Code

Weight	1.50	kg
Volume	0.00	m³

Responsible Administrator

Tip: Compute and set the product weight including weight of delivery package.

Adding delivery cost to the quotation

You can now choose the Delivery Method on your sale order. If you want to invoice the price of the delivery charge on the sale order, click on Set price, it will add a line with the name of the delivery method as a product.

SO003

Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Laptop	Laptop	1.000	1,250.00	(Tax 15.00%)	\$ 1,250.00
[Delivery] Delivery charges	Postal Delivery	1.000	12.00	(Tax 15.00%)	\$ 12.00

Terms and conditions... (note: you can setup default ones in the Configuration menu)

Untaxed Amount: \$ 1,262.00
Taxes: \$ 189.30
Total: \$ 1,451.30

Video

Access the video at <https://www.youtube.com/watch?v=o1QOCiWOnwk>

4.10 Manage Inventory

4.10.1 How to trigger the purchase of products based on sales?

Video

Access the video at <https://www.youtube.com/watch?v=76d-yIrcRKs>

4.11 Service Product

4.11.1 How to invoice milestones of a project?

There are different kind of service sales: prepaid volume of hours/days (e.g. support contract), billing based on time and material (e.g. billing consulting hours) or a fixed price contract (e.g. a project).

Milestone invoicing can be used for expensive or large scale projects, with each milestone representing a clear sequence of work that will incrementally build up to the completion of the contract. For example, a marketing agency hired for a

new product launch could break down a project into the following milestones, each of them considered as one service with a fixed price on the sale order :

- Milestone 1 : Marketing strategy audit - 5 000 euros
- Milestone 2 : Brand Identity - 10 000 euros
- Milestone 3 : Campaign launch & PR - 8 500 euros

In this case, an invoice will be sent to the customer each time a milestone will be successfully reached. That invoicing method is comfortable both for the company which is ensured to get a steady cash flow throughout the project lifetime and for the client who can monitor the project's progress and pay in several times.

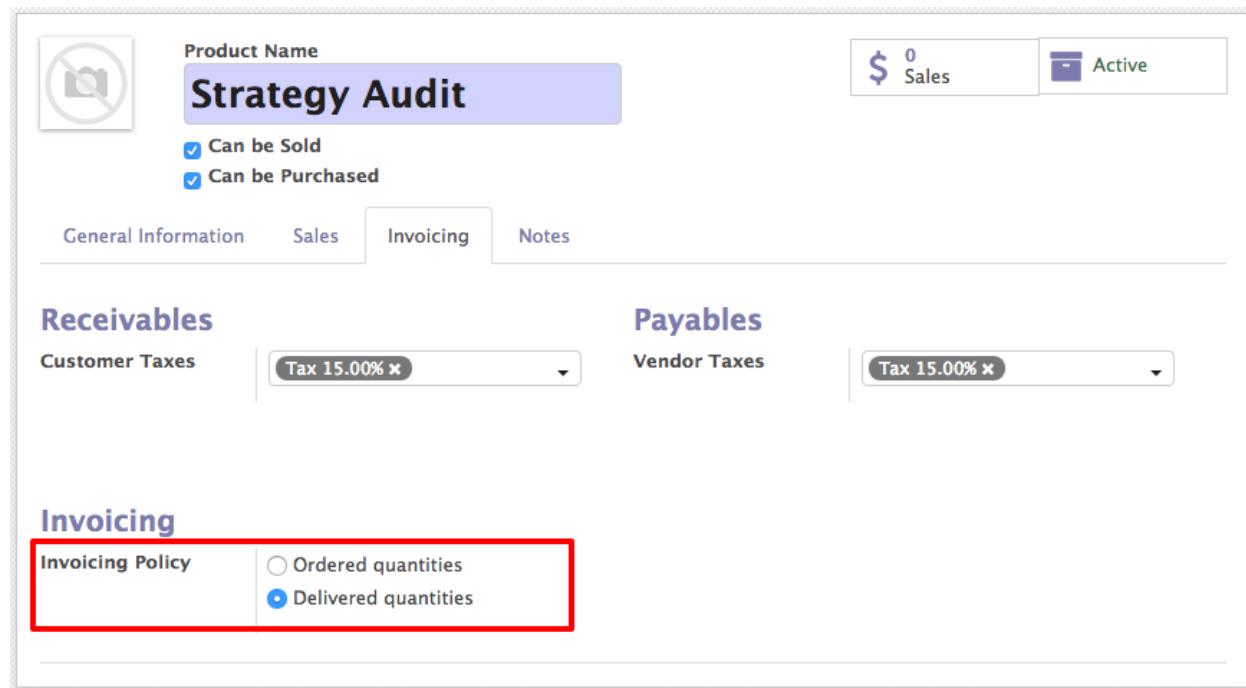
Note: You can also use milestones to invoice percentages of the entire project. For example, for a million euros project, your company might require a 15% upfront payment, 30% at the midpoint and the balance at the contract conclusion. In that case, each payment will be considered as one milestone.

Configuration

In order to sell services and to send invoices, you need to install the Sales application, from the Apps icon.

In Odoo, each milestone of your project is considered as a product. From the Sales application, use the menu Sales → Products, create a new product with the following setup:

- Name: Strategy audit
- Product Type: Service
- Invoicing Policy: Delivered Quantities, since you will invoice your milestone after it has been delivered
- Track Service: Manually set quantities on order, as you complete each milestone, you will manually update their quantity from the Delivered tab on your sale order



The screenshot shows the 'Product' creation screen in Odoo. At the top, there is a 'Product Name' field containing 'Strategy Audit'. To the left of the name is a small icon of a document with a slash through it. To the right are two status indicators: '\$ 0 Sales' and a blue square labeled 'Active'. Below the product name, there are two checked checkboxes: 'Can be Sold' and 'Can be Purchased'. Underneath these, there are tabs for 'General Information', 'Sales', 'Invoicing', and 'Notes', with 'Invoicing' being the active tab. The 'Invoicing' tab contains sections for 'Receivables' and 'Payables', each with a dropdown menu showing 'Tax 15.00% x'. At the bottom of the 'Invoicing' section, there is a 'Invoicing Policy' field with two radio button options: 'Ordered quantities' and 'Delivered quantities'. The 'Delivered quantities' option is selected and highlighted with a red border.

Note: Apply the same configuration for the others milestones.

Quotations and sale orders

Now that your milestones (or products) are created, you can create a quotation or a sale order with each line corresponding to one milestone. For each line, set the Ordered Quantity to 1 as each milestone is completed once. Once the quotation is confirmed and transformed into a sale order, you will be able to change the delivered quantities when the corresponding milestone has been achieved.

The screenshot shows the Odoo Sale Order interface for SO022. At the top, it displays the customer as Agrolait, an expiration date of 07/06/2018, and payment terms of 30 Net Days. The main area shows three items in the Order Lines tab:

Product	Description	Ordered Qty	Unit Price	Taxes	Subtotal
Strategy Audit	Strategy Audit	1.000	5,000.00	Tax 15.00%	\$ 5,000.00
Rebranding	Rebranding	1.000	10,000.00	Tax 15.00%	\$ 10,000.00
Campaign launch & PR	Campaign launch & PR	1.000	8,500.00	Tax 15.00%	\$ 8,500.00

Below the table, there is a note about setting default terms and conditions, followed by a summary of the total amount:

- Untaxed Amount: \$ 23,500.00
- Taxes: \$ 3,525.00
- Total: \$ 27,025.00

Invoice milestones

Let's assume that your first milestone (the strategy audit) has been successfully delivered and you want to invoice it to your customer. On the sale order, click on Edit and set the Delivered Quantity of the related product to 1.

Tip: As soon as the above modification has been saved, you will notice that the color of the line has changed to blue, meaning that the service can now be invoiced. In the same time, the invoice status of the SO has changed from Nothing To Invoice to To Invoice

Click on Create invoice and, in the new window that pops up, select Invoiceable lines and validate. It will create a new invoice (in draft status) with only the strategy audit product as invoiceable.

Draft Invoice

Product	Description	Quantity	Unit Price	Taxes	Subtotal
Strategy Audit	Strategy Audit	1.000	5,000.00	Tax 15.00%	\$ 5,000.00

Untaxed Amount: \$ 5,000.00
Tax: \$ 750.00
Total: \$ 5,750.00

Note: In order to be able to invoice a product, you need to set up the Accounting application and to configure an accounting journal and a chart of account. Click on the following link to learn more: [How to setup Odoo Accounting?](#)

Back on your sale order, you will notice that the Invoiced column of your order line has been updated accordingly and that the Invoice Status is back to Nothing to Invoice.

Follow the same workflow to invoice your remaining milestones.

Video

Access the video at <https://www.youtube.com/watch?v=m7Fmq0H3qo8>

4.11.2 How to create task from sales order and invoice based on timesheet?

Video

Access the video at <https://www.youtube.com/watch?v=NTgArimc5MI>

4.12 Subscription

4.12.1 Set up recurring invoice, that help you to invoice regularly

Video

Access the video at <https://www.youtube.com/watch?v=iHardy2xBLU>

4.12.2 Sell subscriptions through sales quotation

Video

Access the video at https://www.youtube.com/watch?v=r9kVUJo_k5E

4.12.3 Sell subscription through eCommerce platform, receive payment through card (auto-debit)

Video

Access the video at <https://www.youtube.com/watch?v=P0O6rTA1kec>

4.13 Customer Portal

4.13.1 How to get customer approval on quotation through customer portal?

Access the video at <https://www.youtube.com/watch?v=IEl0v3968kk>

4.13.2 How to get online payment on quotation through customer portal?

Video

Access the video at <https://www.youtube.com/watch?v=DZ6OsPzM-G4>

4.13.3 Confirm quotation online and pay Invoice through customer portal

Video

Access the video at <https://www.youtube.com/watch?v=m0ydtBqPrwY>

CHAPTER 5

Accounting and Finance

5.1 Odoo Accounting

Access the video at <https://www.youtube.com/watch?v=6XgKPjgyoec>

5.1.1 Transcript

Odoo is beautiful accounting software designed for the needs of the 21st century.

Odoo connects directly to your bank or paypal account. Transactions are synchronized every hour and reconciliation is blazing fast. It's like magic.

Instantly create invoices and send them with just a click. No need to print them.

Odoo can send them for you by email or regular mail.

Your customers pay online, meaning you get your money right away.

Odoo accounting is connected with all Odoo our apps such as sale, purchase, inventory and subscriptions.

This way, recording vendor bills is also super quick. Set a vendor, select the purchase order and Odoo fills in everything for you automatically.

Then, just use the SEPA protocol or print checks to pay vendors in batches.

It's that easy with Odoo.

Wait, there is more. You will love the Odoo reports. From legal statements to executive summaries, they are fast and dynamic. Use Odoo's business intelligence feature to navigate through all your companies data.

Of course, Odoo is mobile too. You can use it to check your accounts on the go.

Try Odoo now, and join 2 millions of happy users.

5.2 The Accounting behind Odoo

This page summarises the way Odoo deals with typical accounts and transactions.

5.2.1 Double-entry bookkeeping

Odoo automatically creates all the behind-the-scenes journal entries for each of your accounting transactions: customer invoices, point of sale order, expenses, inventory moves, etc.

Odoo uses the rules of double-entry bookkeeping system: all journal entries are automatically balanced (sum of debits = sum of credits).

5.2.2 Accrual and Cash Basis Methods

Odoo support both accrual and cash basis reporting. This allows you to report income / expense at the time transactions occur (i.e., accrual basis), or when payment is made or received (i.e., cash basis).

5.2.3 Multi-companies

Odoo allows to manage several companies within the same database. Each company has its own chart of accounts and rules. You can get consolidation reports following your consolidation rules.

Users can access several companies but always work in one company at a time.

5.2.4 Multi-currencies

Every transaction is recorded in the default currency of the company. For transactions occurring in another currency, Odoo stores both the value in the currency of the company and the value in the currency of the transaction. Odoo can generate currencies gains and losses after the reconciliation of the journal items.

Currency rates are updated once a day using a yahoo.com online web-service.

5.2.5 International Standards

Odoo accounting support more than 50 countries. The Odoo core accounting implement accounting standards that is common to all countries and specific modules exists per country for the specificities of the country like the chart of accounts, taxes, or bank interfaces.

In particular, Odoo's core accounting engine supports:

- Anglo-Saxon Accounting (U.S., U.K., and other English-speaking countries including Ireland, Canada, Australia, and New Zealand) where cost of good sold are reported when products are sold/delivered.
- European accounting where expenses are accounted at the supplier bill.
- Storno accounting (Italy) where refund invoices have negative credit/debit instead of reverting the original journal items.
- Odoo also have modules to comply with IFRS rules.

5.2.6 Accounts Receivable & Payable

By default, Odoo uses a single account for all account receivable entries and one for all accounts payable entries. You can create separate accounts per customers/suppliers, but you don't need to.

As transactions are associated to customers or suppliers, you get reports to perform analysis per customer/supplier such as the customer statement, revenues per customers, aged receivable/payables, ...

5.2.7 Wide range of financial reports

In Odoo, you can generate financial reports in real time. Odoo's reports range from basic accounting reports to advanced management reports. Odoo's reports include:

- Performance reports (such as Profit and Loss, Budget Variance)
- Position reports (such as Balance Sheet, Aged Payables, Aged Receivables)
- Cash reports (such as Bank Summary)
- Detail reports (such as Trial Balance and General Ledger)
- Management reports (such as Budgets, Executive Summary)
- Odoo's report engine allows you to customize your own report based on your own formulae.

5.2.8 Import bank feeds automatically

Bank reconciliation is a process that matches your bank statement lines, as supplied by the bank, to your accounting transactions in the general ledger. Odoo makes bank reconciliation easy by frequently importing bank statement lines from your bank directly into your Odoo account. This means you can have a daily view of your cashflow without having to log into your online banking or wait for your paper bank statements.

Odoo speeds up bank reconciliation by matching most of your imported bank statement lines to your accounting transactions. Odoo also remembers how you've treated other bank statement lines and provides suggested general ledger transactions.

5.2.9 Calculates the tax you owe your tax authority

Odoo totals all your accounting transactions for your tax period and uses these totals to calculate your tax obligation. You can then check your sales tax by running Odoo's Tax Report.

5.2.10 Inventory Valuation

Odoo support both periodic (manual) and perpetual (automated) inventory valuations. The available methods are standard price, average price, LIFO (for countries allowing it) and FIFO.

5.2.11 Easy retained earnings

Retained earnings is the portion of income retained by your business. Odoo automatically calculates your current year earnings in real time so no year-end journal or rollover is required. This is calculated by reporting the profit and loss balance to your balance sheet report automatically.

5.3 Customer Invoice

5.3.1 Create first customer invoice and register payment

Video

Access the video at <https://www.youtube.com/watch?v=rCOaO26xM68>

5.3.2 How to match payment against an invoice?

Video

Access the video at <https://www.youtube.com/watch?v=22ZCLf5gIUG>

5.3.3 How to setup cash discounts?

Video

Access the video at <https://www.youtube.com/watch?v=uNksgDgzKj8>

5.3.4 Reset invoice numbering based on the date range (monthly invoice book)

Video

Access the video at https://www.youtube.com/watch?v=kFJNthxZ_cA

5.4 Payment Terms

5.4.1 How to setup and use payment terms?

Video

Access the video at <https://www.youtube.com/watch?v=lagIgJBW-r4>

5.4.2 How to define an installment plan on customer invoices?

Video

Access the video at <https://www.youtube.com/watch?v=VL56Qsv0mzY>

5.4.3 Warning message on credit limit reached and block further invoice when it cross limits

Video

Access the video at <https://www.youtube.com/watch?v=CGMiClvEuuc>

5.5 Payment & Followups

5.5.1 What are the different ways to record a payment?

Video

Access the video at <https://www.youtube.com/watch?v=0UGvSCXxCn0>

5.5.2 How to track uncleared customer check in bank?

Video

Access the video at <https://www.youtube.com/watch?v=EmCvqT8jiQs>

5.5.3 Create invoice, receive and register partial payment on invoice

Video

Access the video at <https://www.youtube.com/watch?v=yAkzrzE94c0>

5.5.4 How to automate customer follow-ups with plans?

Video

Access the video at <https://www.youtube.com/watch?v=otuzF6CcUrA>

5.5.5 Receive advance payment from customer and match against invoice later

Video

Access the video at <https://www.youtube.com/watch?v=GMq-wCrDeDw>

5.5.6 How to print customer ledger?

Video

Access the video at <https://www.youtube.com/watch?v=97lbK9zKYAQ>

5.6 Setup Accounting

5.6.1 How to setup Company Information, Bank Accounts and Fiscal Period?

Video

Access the video at https://www.youtube.com/watch?v=mmPNI2TY_Jw

5.6.2 How to setup Odoo Accounting and Import opening balance?

Video

Access the video at https://www.youtube.com/watch?v=ybnQN_ip0gQ

5.7 Taxes & Duties

5.7.1 Apply tax based on local or export sales

Video

Access the video at <https://www.youtube.com/watch?v=RUnVpurD6gQ>

5.7.2 Manage withholding taxes, ledger and payment to government

A withholding tax, also called a retention tax, it is a government requirement for the payer of a customer invoice to withhold or deduct tax from the payment, and pay that tax to the government. In most jurisdictions, withholding tax applies to employment income.

With normal taxes, the tax is added to the subtotal to give you the total to pay. As opposed to normal taxes, withholding taxes are deducted from the amount to pay, as the tax will be paid by the customer.

As, an example, in Colombia you may have the following vendor bills:

Vendor Bill BILL/2018/0001

Invoice Date:
08/14/2018

Description	Quantity	Unit Price	Taxes	Amount
Consulting Service	10.000	100.00	15.00%, 10%	\$ 1,000.00

Subtotal	\$ 1,000.00
Tax 15%	\$ 150.00
Retention Tax	\$ -100.00
Total	\$ 1,050.00
<i>Paid on 2018-08-14</i>	\$ 1,050.00
Amount Due	\$ 0.00

In this example, the company who sent the invoice was of 1000\$ + 15% Tax the customer has to deduct the 10% tax and pay to the government.

Video

Access the video at <https://www.youtube.com/watch?v=b23D98Vpf4w>

5.8 Credit Notes

5.8.1 How to reject customer invoice, which is not issued to customer?

Video

Access the video at <https://www.youtube.com/watch?v=-kG0gjRa1SE>

5.8.2 How to modify the confirmed customer invoice?

Video

Access the video at <https://www.youtube.com/watch?v=SfNSZ5UL31E>

5.8.3 How to refund a fully paid customer invoice?

Video

Access the video at <https://www.youtube.com/watch?v=xibj9GBkHiE>

5.8.4 How to refund the partially paid invoice?

Video

Access the video at <https://www.youtube.com/watch?v=mJCEtbbnyvc>

5.9 Bank & Cash

5.9.1 How to do Bank Reconciliation in Odoo?

Video

Access the video at <https://www.youtube.com/watch?v=A-96JQ6B-bI>

5.9.2 How to manage the bank reconciliation process?

Video

Access the video at <https://www.youtube.com/watch?v=A-96JQ6B-bI>

5.9.3 Import bank statement (ofx format) and quick bank reconciliation

Video

Access the video at https://www.youtube.com/watch?v=YdbPaP_8yO0

5.9.4 Transferring money from bank account to petty cash (Cash withdrawal)

Video

Access the video at <https://www.youtube.com/watch?v=bNvWbWFNTP8>

5.10 Indian Localization

5.10.1 Multiple tax included in price, i.e.Indian GST Tax

Video

Access the video at <https://www.youtube.com/watch?v=R2XP2t8-g14>

5.10.2 Track tax deduction at source and certificate receivable, (customer invoice)

TDS stands for **Tax Deducted at Source**. It was introduced to collect tax at the source from where an individual's income is generated.

The government uses TDS as a tool to collect tax in order to minimise tax evasion by taxing the income (partially or wholly) at the time it is generated rather than at a later date.

TDS is applicable on the various incomes such as salaries, interest received, commission received, consulting or professional services, job-work, etc.

Read more at: https://www.incometaxindia.gov.in/Pages/Deposit_TDS_TCS.aspx

Business case

The *My Company* is a consulting company selling a professional consulting services their regular customer *China Export*. The customer will deducts the TDS @ 10% rate and make the payment against the bill.

Video

Access the video at <https://www.youtube.com/watch?v=d9Mx00lHxoU>

5.10.3 Manage tax deduction at source, tax ledger, compute payable and pay through bank (vendor bill)

TDS stands for **Tax Deducted at Source**. It was introduced to collect tax at the source from where an individual's income is generated.

The government uses TDS as a tool to collect tax in order to minimise tax evasion by taxing the income (partially or wholly) at the time it is generated rather than at a later date.

TDS is applicable on the various incomes such as salaries, interest received, commission received, consulting or professional services, job-work, etc.

Read more at: https://www.incometaxindia.gov.in/Pages/Deposit_TDS_TCS.aspx

Business case

The *My Company* gets the professional consulting services from *Ajay Consulting Services* we have to deduct the TDS @ 10% and deposit to the government by the 7th of next month.

Video

Access the video at <https://www.youtube.com/watch?v=wuhBfG2khys>

5.10.4 Manage tax deduction at source (TDS) with accounting entries

Video

Access the video at <https://www.youtube.com/watch?v=DxJNSjAfJ20>

5.11 Multi Currency

5.11.1 How to prepare invoice in foreign currency?

Video

Access the video at <https://www.youtube.com/watch?v=70-MY4AFCU>

5.12 Vendor Bills & Payments

5.12.1 Purchase order to vendor bill, payment through check

Video

Access the video at <https://www.youtube.com/watch?v=oAFcDFNBkCE>

5.12.2 How to register cash sales and expense in account?

Video

Access the video at <https://www.youtube.com/watch?v=m7wjxc3Mbck>

5.12.3 How to pay vendor bills by check and print check from Odoo accounting?

Video

Access the video at <https://www.youtube.com/watch?v=Lw4vX1A8tNE>

5.12.4 How to manage batch deposits of checks?

Video

Access the video at <https://www.youtube.com/watch?v=yIlGdN00o2k>

5.12.5 How to pay several vendor bills at once?

Video

Access the video at <https://www.youtube.com/watch?v=1TBV0gUSq84>

5.12.6 Register partial payment while paying to multiple vendor bills

Video

Access the video at <https://www.youtube.com/watch?v=O51ACPIaiOA>

5.12.7 How to forecast future vendor bills to pay?

Video

Access the video at <https://www.youtube.com/watch?v=4bbIW506cM8>

5.12.8 How to create single vendor bill from multiple purchase orders?

Video

Access the video at <https://www.youtube.com/watch?v=eVKzzkfZzE0>

5.13 Inventory Valuation (Anglo-Saxons)

5.13.1 Compute the inventory valuation in P&L and BS (using standard costing and manual valuation)

The manual inventory valuation method suggest that the valuation of an inventory has to be managed manually in financial accounting. The periodic journal entry has to be passed on regular intervals so as to keep the valuation in balance sheet and cost of goods sold in profit and loss account.

On every regular interval an accounting entry has to be passed as below:

Description	Debit	Credit
Inventory Valuation		800
Cost of Goods Sold	800	

To compute the cost of goods sold use the below formula

$\text{COGS} = \text{Inventory Valuation as per Balance sheet} - \text{Inventory Valuation as per Inventory}$

Product Cost price

As your inventory costing method is standards, you are allowed to change the cost price of the product, assumed that you increase the cost price.

Tip: Make sure you change the cost price on the product once your valuation is equal for inventory and balance sheet, else you may have a wrong cost of goods sold entry.

When you see a COGS is having a negative value it means that your value of the inventory increased in warehouse this should be reflect in the balance sheet too.

To increase the value in balance sheet you have to pass below journal entry

Description	Debit	Credit
Inventory Valuation	800	
Inventory Valuation Difference		800

Or, when you see a COGS is having a positive value it means that your value of the inventory decreased in warehouse and this should be reflect in the balance sheet too.

To decrease the value in balance sheet you have to pass below journal entry

Description	Debit	Credit
Inventory Valuation		800
Inventory Valuation Difference	800	

Video

Access the video at <https://www.youtube.com/watch?v=pVsdiEl6OJw>

See also:

- *Compute the inventory valuation in P&L and BS (fifo costing method and manual valuation)*
- *Compute the inventory valuation in P&L and BS (average costing method and manual valuation)*

5.13.2 Compute the inventory valuation in P&L and BS (fifo costing method and manual valuation)

The manual inventory valuation method suggest that the valuation of an inventory has to be manage manually in financial accounting. The periodic journal entry has to be passed on regular internal so keep updated the valuation in balance sheet and cost of goods sold in profit and loss account.

On every regular internal an accounting entry has to be passed as below:

Description	Debit	Credit
Inventory Valuation		800
Cost of Goods Sold	800	

To compute the cost of goods sold use the below formula

$$\text{COGS} = \text{Inventory Valuation as per Balance sheet} - \text{Inventory Valuation as per Inventory}$$

Product Cost price

The cost price on the product page always display the cost of last unit sold or consumed or scrapped from the stock. If you change that manually it will not make any changes in the system.

Tip: Hide the product cost field, if all of your products have FIFO as the inventory costing method, even-users will never get confused.

Video

Access the video at https://www.youtube.com/watch?v=_TFhth_Uzc4

See also:

- *Compute the inventory valuation in P&L and BS (using standard costing and manual valuation)*
- *Compute the inventory valuation in P&L and BS (average costing method and manual valuation)*

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On every regular internal an accounting entry has to be passed as below:

Description	Debit	Credit
Inventory Valuation		800
Cost of Goods Sold	800	

To compute the cost of goods sold use the below formula

$$\text{COGS} = \text{Inventory Valuation as per Balance sheet} - \text{Inventory Valuation as per Inventory}$$

Product Cost price

As your inventory costing method is average, you are allowed to change the cost price of the product, assumed that you increase the cost price.

Tip: Make sure you change the cost price on the product once your valuation is equal for inventory and balance sheet, else you may have a wrong cost of goods sold entry.

When you see a COGS is having a negative value it means that your value of the inventory increased in warehouse this should be reflect in the balance sheet too.

To increase the value in balance sheet you have to pass below journal entry

Description	Debit	Credit
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To decrease the value in balance sheet you have to pass below journal entry

Description	Debit	Credit
Inventory Valuation		800
Inventory Valuation Difference	800	

Video

Access the video at <https://www.youtube.com/watch?v=aHa8jjJsEKA>

See also:

- *Compute the inventory valuation in P&L and BS (using standard costing and manual valuation)*
- *Compute the inventory valuation in P&L and BS (fifo costing method and manual valuation)*

5.13.4 Correct cost of good sold accounting entry for kit type product using anglo saxon method

Video

Access the video at <https://www.youtube.com/watch?v=6-KYnZOTO9A>

5.13.5 Inventory valuation and compute the cost of goods sold

Video

Access the video at <https://www.youtube.com/watch?v=PlN0r1Acroo>

See also:

- *Correct cost of good sold accounting entry for kit type product using anglo saxon method*

CHAPTER 6

Inventory Management

6.1 Product & Stock

6.1.1 How to setup a minimum stock rule?

Video

Access the video at https://www.youtube.com/watch?v=4oN_81i1Qfs

6.1.2 Compute stock for the kit product based on the component stock

Video

Access the video at <https://www.youtube.com/watch?v=m7wjxc3Mbck>

6.2 Delivery Order

6.2.1 How to use different invoice and delivery addresses?

Video

Access the video at https://www.youtube.com/watch?v=fHp5-UUp_U

6.2.2 How to amendment products on delivery order? (Installed only inventory application)

Video

Access the video at <https://www.youtube.com/watch?v=qakpa5hy83k>

6.3 Incoming Shipment

6.3.1 How to control product received? (Receive entirely & partially)

Video

Access the video at <https://www.youtube.com/watch?v=tpUsy1XNQak>

6.3.2 How to transfer dairy products to fridge (cold storage) when it arrives to inventory?

Video

Access the video at <https://www.youtube.com/watch?v=zdybPdzdVNw>

6.4 Inventory Costing

6.4.1 Compute the cost of product (standard price)

Business case

The **My Company** is a distributor of *Laptop*, they purchase a laptop from the default supplier and sell to retail customers, they do not maintain the stock, they always purchase on demand so **Standard pricing** is perfect costing method for them. Some times they benefit or loss if they have stock and product price change as they directly change the product cost price which impacts on their inventory value.

Configuration

- Install **Sales Management**, **Purchase Management & Accounting** and **Finance** apps
- Create a product *Laptop*
- Set the Internal Category to *All / Saleable*.
- Default costing method on the category is Standard pricing.
- Define *Default Supplier* as a vendor with the cost price of *Laptop*.
- Purchase 2 unit of Laptop at different rate then the Standard price, inventory value will be computed based on the product Standard price field.

Note: This method is less useful in the real-life.

Video

Access the video at <https://www.youtube.com/watch?v=TEHOwOjrRWM>

See also:

- *Compute the cost of product (average costing)*
- *Compute the cost of product (first in first out method)*
- *Compute sell price and margin based on product cost price (AVCO costing method)*

6.4.2 Compute the cost of product (average costing)

The average costing method help you to decide the product sell price, each time you purchase the product new cost will be updated based on the existing stock and purchased stock value.

Business case

The **My Company** is a distributor of *Laptop*, they purchase a laptop from the default supplier and sell to retail customers, there are sometime frequent price change, so **My Company** wants to setup the inventory costing and based on average cost method.

Configuration

- Install **Sales Management**, **Purchase Management & Accounting** and **Finance** apps
- Create a product *Laptop*
- Set the Internal Category to *All / Saleable*
- Set **Costing Method** to *Average Cost (AVCO)* on *All / Saleable* category
- Define *Default Supplier* as a vendor with the cost price of *Laptop*.
- Purchase 3 unit of Laptop at different rates, the product will be computed on each reception by doing an average based on the purchase price.

Tip: Assumed that you have a 10 unit of laptop cost of 8500 (the inventory value will be same as the cost), you purchase new 10 laptop at the price of 830 each. The new cost price will be computed by an average of total cost vs units. $840 = (8500 + 8300) / 20$ (10 existing stock + 10 new purchase)

Video

Access the video at <https://www.youtube.com/watch?v=QjdRX6El-4M>

See also:

- *Compute the cost of product (standard price)*
- *Compute the cost of product (first in first out method)*
- *Compute sell price and margin based on product cost price (AVCO costing method)*

6.4.3 Compute the cost of product (first in first out method)

The fifo costing method help you to compute the accurate profit in the profit and loss account based on the all the purchase expense and sell price. You can add the landed cost (the cost of transportation) if you do a real time inventory valuation with fifo costing method. Each time you remove the products from warehouse the cost will be computed on the product **Cost** field

Configuration

- Install **Sales Management**, **Purchase Management & Accounting** and **Finance** apps
- Create a product *Laptop*
- Set the Internal Category to *All / Saleable*
- Set **Costing Method** to *Average Cost (AVCO)* on *All / Saleable* category
- Define *Default Supplier* as a vendor with the cost price of *Laptop*.
- Purchase 3 unit of Laptop at different rates, the product will be computed on each reception by doing an average based on the purchase price.

Tip: The FIFO is same as the Real price costing, follows the accounting FIFO and not forcing for warehouse FIFO removal strategy.

Video

Access the video at <https://www.youtube.com/watch?v=a8UXCiETC38>

See also:

- *Compute the cost of product (standard price)*
- *Compute the cost of product (average costing)*
- *Compute sell price and margin based on product cost price (AVCO costing method)*

6.5 Inventory Valuation (Anglo-Saxons)

6.5.1 Compute the inventory valuation in P&L and BS (using standard costing and manual valuation)

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- *Compute the cost of product (standard price)*
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- *Compute sell price and margin based on product cost price (AVCO costing method)*
- *Compute the inventory valuation in P&L and BS (fifo costing method and manual valuation)*
- *Compute the inventory valuation in P&L and BS (average costing method and manual valuation)*

6.5.2 Compute the inventory valuation in P&L and BS (fifo costing method and manual valuation)

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Tip: Hide the product cost field, if all of your products have FIFO as the inventory costing method, even-users will never get confused.

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- *Compute the cost of product (standard price)*
- *Compute the cost of product (first in first out method)*
- *Compute sell price and margin based on product cost price (AVCO costing method)*
- *Compute the inventory valuation in P&L and BS (using standard costing and manual valuation)*
- *Compute the inventory valuation in P&L and BS (average costing method and manual valuation)*

6.5.3 Compute the inventory valuation in P&L and BS (average costing method and manual valuation)

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Description	Debit	Credit
Inventory Valuation		800
Inventory Valuation Difference	800	

Video

Access the video at <https://www.youtube.com/watch?v=aHa8jjJsEKA>

See also:

- [Compute the cost of product \(standard price\)](#)
- [Compute the cost of product \(first in first out method\)](#)
- [Compute sell price and margin based on product cost price \(AVCO costing method\)](#)
- [Compute the inventory valuation in P&L and BS \(using standard costing and manual valuation\)](#)
- [Compute the inventory valuation in P&L and BS \(fifo costing method and manual valuation\)](#)

Purchase Management

7.1 Request for Quotation

7.1.1 How to create a Request for Quotation?

Video

Access the video at <https://www.youtube.com/watch?v=ksSvpBKRoI4>

7.1.2 How to trigger the purchase of products based on sales?

Video

Access the video at <https://www.youtube.com/watch?v=76d-yIrcRKh>

7.1.3 How to setup drop-shipping?

Video

Access the video at <https://www.youtube.com/watch?v=B839OZpB95U>

7.1.4 How to setup two levels of approval for purchase orders?

Video

Access the video at <https://www.youtube.com/watch?v=C8wdohr6Z10>

7.2 Supplier Pricelist

7.2.1 How to search for product based on supplier code or name on purchase order?

Video

Access the video at <https://www.youtube.com/watch?v=dBKetExCKNE>

7.3 Purchase Exception

7.3.1 How to buy from new supplier with drop ship policy, when you default supplier reject the order?

Video

Access the video at <https://www.youtube.com/watch?v=kGKOb4oW6yU>

7.3.2 How to cancel confirmed purchase order or confirmed purchase order received partial shipment?

Video

Access the video at <https://www.youtube.com/watch?v=rGgoldYzLls>

7.4 Vendor Bills

7.4.1 How to control vendor bills, pay vendor bills based on reception?

Video

Access the video at <https://www.youtube.com/watch?v=d05bZbrc8og>

7.5 Purchase Agreement

7.5.1 How to manage bulk purchase through tender process?

Video

Access the video at <https://www.youtube.com/watch?v=1TBV0gUSq84>

7.5.2 How to purchase partially at two vendors for the same purchase tenders?

Video

Access the video at <https://www.youtube.com/watch?v=482c0gxqGMs>

7.6 Inventory Costing

7.7 Advance Topics

7.7.1 How to sell chemical products along with the containers and manage the re-filling process?

Video

Access the video at <https://www.youtube.com/watch?v=MPVaObaqCm4>

CHAPTER 8

Point of Sale

8.1 Point of Sale

8.1.1 Use customers on point of sale and access the customer ledger

Registering your customers will give you the ability to grant them various privileges such as discounts, loyalty program, specific communication. It will also be required if they want an invoice and registering them will make any future interaction with them faster.

Video

Access the video at <https://www.youtube.com/watch?v=ev2HnMPqXLs>

8.1.2 Create a customer invoice for selected orders on Point of Sale

Some of your customers might request an invoice when buying from your Point of Sale, you can easily manage it directly from the PoS interface.

Video

Access the video at <https://www.youtube.com/watch?v=tnIvcBZZvCs>

8.1.3 Launch a limited period offers on Point of Sale

Entice your customers and increase your revenue by offering time-limited or seasonal discounts. Odoo has a powerful pricelist feature to support a pricing strategy tailored to your business.

Video

Access the video at <https://www.youtube.com/watch?v=NK4ZDqlq-9Y>

8.1.4 Manage cash round-up or down at Point of Sale cash payment

Video

Access the video at <https://www.youtube.com/watch?v=c6-hjrvdVZM>

8.1.5 Apply discount on specific product price or on order value

If you seldom use discounts, applying manual discounts might be the easiest solution for your Point of Sale.

You can either apply a discount on the whole order or on specific products.

Business case

The shop *My company* wants to apply the discount for the specific product, or on whole order based on the customer.

Video

Access the video at https://www.youtube.com/watch?v=MIpedINE_Qg

8.1.6 Retain your walk-in customers, setup customer retention program (loyalty program)

Encourage your customers to continue to shop at your point of sale with a Loyalty Program.

Business case

The shop *My Company* wants to setup the customer retention program, that offers a 0.25 loyalty point to customer for each 1\$ they spent in the shop.

Customer can later use those points, each point equivalent to 1\$ to pay their bills later. There is no limit on number of points they earn and spent.

Video

Access the video at <https://www.youtube.com/watch?v=8DYbAMS3jno>

8.1.7 Sales return through Point of Sale

Video

Access the video at <https://www.youtube.com/watch?v=ub3hRhasLtM>

8.2 Session Management

8.2.1 How to print z-report from Odoo point of sale?

Video

Access the video at <https://www.youtube.com/watch?v=hcAAfo5DwYI>

8.2.2 Print z-report at the end of the day for each terminal separately and grouped

Video

Access the video at <https://www.youtube.com/watch?v=42qrXd7JrfE>

8.3 Barcode Scanner

8.3.1 Scan weight of the product through barcode in Point of sale

Point of sale may need to scan the product weight to decide the price. There are multiple ways to get the weight into point of sale, some of them are as below

- You are selling predefined packs (based on weight) of the products, and you want to know which pack has been scanned at the terminal to decide the price. i.e. pack of 250grm, pack of 500grm, pack of 1kg etc.
- You sell the items in loose packaging form, where customer create their own custom pack depending on their need, they do weight and generate the barcode accordingly.
- The third way is more easier to use in real-life but most complex to configure in Odoo, is to attached the weight scale machine to the point of sales terminal.

Business case

The small fruit shop sells the predefined packs of the Apples, they create a packs in advance such as Pack of 250grm, Pack of 500grm or Pack of 1kg. They would like to compute the price of the pack depending on the pack scan at the terminal.

Tip: You can scan **Product price** or **Discount** from the barcode, you need to configure the barcode rules under Nomenclature (i.e. Goto Point of sale session configuration and enable **Barcode Scanner** option)

Video

Access the video at <https://www.youtube.com/watch?v=L-kRofdfdLc>

8.3.2 Scan product price through barcode in Point of Sale (Dynamic pricing without pricelist)

The great featurer is pricelist can be applied to the point of sale in Odoo. However it is not easy to configure the pricelist for the point of sale, also it increase the size in number of data that load at the point of sale startup.

Odoo point of sales able to read the understand the barcode well so that, it can fetch the product price form the barcode, and they works well without loading lots of data and defining the complex pricelist rules for the point of sale. You can create a barcode with price in below business scenarios.

- The manufacturer print the barcode with the price, as the price often changes.
- You can create your own barcode as you want to run the promotion scheams untile the stock.

Business case

The shop **My Company** wonts the run the promotion program on some products, for the limited stock available in the shop.

Configuration

You have to create the barcode rules under the point of sale barcode nomenclature. The defaule rule is already exist with the name *Price Barcodes 2 Decimals* the **Barcode Pattern** is *23.....{NNNDD}* it describes that the total size of the barcode is 12 digit.

It start with 23, then 5 digit product code at last it have the 5 digit product price can be configured.

Tip: The barcode on the product has to be configre the 12 digit i.e. 231234500000. keep last 5 digit as 0 as it may different according to the price.

Video

Access the video at <https://www.youtube.com/watch?v=xbPLx-KRh2s>

8.3.3 Scanning manufacturer barcode at Point of Sale (Scan same product for multiple barcodes)

Video

Access the video at <https://www.youtube.com/watch?v=E6zum4RCCzw>

8.4 Accounting

8.4.1 How to do credit sale through the point of sale

Video

Access the video at <https://www.youtube.com/watch?v=zHH1uqCVJEc>

8.4.2 How to pay invoice through wallet in Point of Sale?

Video

Access the video at https://www.youtube.com/watch?v=_UVBUIsG3nU

8.4.3 Sales return through Point of Sale terminal, receive product and return cash

Video

Access the video at <https://www.youtube.com/watch?v=F1N82xHpC6s>

8.4.4 Sales return through Point of Sale terminal (working with customer invoice and credit note)

Video

Access the video at <https://www.youtube.com/watch?v=6rrfML6vZfw>

CHAPTER 9

Project Management

9.1 Project & Task

9.1.1 How to create task from sales order and invoice based on timesheet?

Video

Access the video at <https://www.youtube.com/watch?v=NTgArimc5MI>

9.1.2 Create default stages in the project created through Sales order

Video

Access the video at <https://www.youtube.com/watch?v=IjfQBadSHs4>

9.1.3 How to gather feedback from customers?

Video

Access the video at <https://www.youtube.com/watch?v=cBRQ73hEHog>

9.2 Timesheet

9.2.1 How to record time spent on Task and Project?

Video

Access the video at <https://www.youtube.com/watch?v=ScMYXe2N004>

9.2.2 Record time spent using Awesome Timesheet - Chrome plugin

Video

Access the video at <https://www.youtube.com/watch?v=OvLfGJdCPGA>

9.3 Helpdesk

9.3.1 Managing service tickets and service contracts

Video

Access the video at <https://www.youtube.com/watch?v=4TRq5HeLprk>

9.4 Customer Portal

9.4.1 How to allow the customer to view timesheet on their task and projects?

Video

Access the video at <https://www.youtube.com/watch?v=cBRQ73hEHog>

CHAPTER 10

Manufacturing

10.1 Inventory

10.1.1 How to issue material to factory location to start manufacturing order?

Video

Access the video at <https://www.youtube.com/watch?v=3MuhLtDM7tM>

10.1.2 Manage stock of liquid products in warehouse (unit vs ml)

Video

Access the video at <https://www.youtube.com/watch?v=4zIxKotfyw4>

10.1.3 Compute stock for the kit product based on the component stock

Video

Access the video at <https://www.youtube.com/watch?v=m7wjxc3Mbck>

10.2 By-Products

10.2.1 Wooden, Glass or Plastic sheet consumption during the manufacturing process

Video

Access the video at <https://www.youtube.com/watch?v=o-aQaXeQe6A>

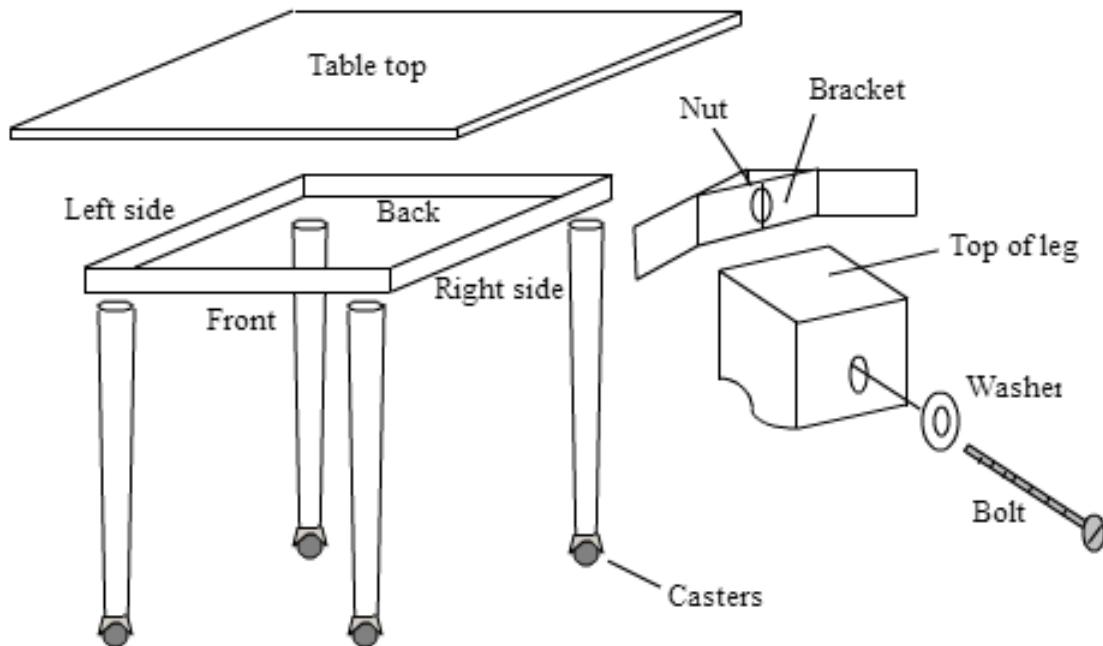
10.3 Subcontracting

10.3.1 Setup subcontracting in manufacturing process

Most manufacturing companies outsource some part of the job contracting work to other manufacturing companies to get the best expertise methodology and resource to produce the world class product (i.e Most reputed companies smart phones are assembled in China is the best example of the subcontracting)

In this document we will show you steps to setup the subcontracting business flow, Issue the raw material to your contractor and get the semi-finished product which will be consumed later to prepare the final product in our factory.

Let's take an example of Table, to produce the table we need 1 table top and table frame, 4 legs and some consumable like bracket and bolt, assumed that table is laminated by third party contractor where we supply wood sheet and lamination sheet to prepare the laminated table top.



Configuration

Install manufacturing, purchase, inventory applications in order to create the full subcontracting flow.

Create location

By default production is the location where all the manufacturing order processed, all the material issued from stock location to Production location, and once production completed the final product pushed back to the stock location.

We need separate location which is not part of our warehouse, we will call it subcontracting. It will be easy to track the material issued to the subcontractor, also we can define reorder level on that location.

Tip: You can enable the multi location from Inventory / Configuration / Settings, select Storage Locations and apply the setting.

To create the location go to Inventory / Configuration / Location, create an internal location named as Contractor under the WH.

The screenshot shows the 'Locations / New' creation screen in Odoo. At the top, there are 'SAVE' and 'DISCARD' buttons. Below them is a toolbar with filters for 'Current Stock', 'Products', and 'Active'. The main area starts with a 'Location Name' field containing 'Contractor'. Under 'Parent Location', 'WH' is selected. In the 'Additional Information' section, 'Location Type' is set to 'Internal Location', 'Owner' is listed, and checkboxes for 'Is a Scrap Location?' and 'Is a Return Location?' are both unchecked. In the 'Localization' section, fields for 'Corridor (X)', 'Shelves (Y)', and 'Height (Z)' are all set to '0', and there is a 'Barcode' field. Below these are sections for 'Logistics', 'Removal Strategy', and 'Put Away Strategy', each with dropdown menus.

Enable routes

Inventory route plays a key role to create the subcontracting flow, using routes we are able to make the custom flow for the inventory, like Issue material to contractor and receive finished material from contractor.

To create the custom route go to Inventory / Configuration / Settings and select Multi-Step Routes, Storage Locations will be selected automatically.

The screenshot shows the 'Configuration / Settings' screen with the 'Warehouse' tab selected. On the left, there are several checkboxes with descriptions: 'Storage Locations' (checked, description: 'Track product location in your warehouse'), 'Multi-Step Routes' (checked, description: 'Use your own routes and putaway strategies'), 'Set Warehouse Routes' (link to 'Multi-Step Routes'), and 'Set Putaway Strategies on Locations' (link to 'Multi-Step Routes'). On the right, there is another checkbox for 'Multi-Warehouses' (unchecked, description: 'Manage several warehouses').

Let's create a two different routes, which can be selectable on the product routes

- Material - select this route on the product which can be issued to the contractor
- Subcontracting - select this route when you want contractor to be product and send it to our warehouse (stock location)

Material Route

Material route, select Product and Product Category under the Applicable On options.

Route Name

Material

Applicable On

Select the places where this route can be selected

Product Categories



Products

Warehouses



Push Rules

Source Location

Destination Location

Operation Name

Add an item

Procurement Rules

Name	Action	Operation Type
+ Issue Material	Move From Another Location	My Company: Delivery Orders
<p>Add an item</p>		

Create a Procurement that applied on the Contractor location and ask our Stock location to fulfill the requirement by stock transfer.

Open: Procurement Rules ×

	<input checked="" type="checkbox"/> Active
Name Issue Material	
Action	Move From Another Location
Applied On	
Procurement Location	WH/Contractor
Creates	
Source Location	WH/Stock
Move Supply Method	Take From Stock
Operation Type	My Company: Delivery Orders
Partner Address	
Delay	2 days

SAVE & CLOSE SAVE & NEW DISCARD

Subcontracting Route

Same way create second route “Subcontracting” that create a manufacturing order at contractor location when we need that semi-finished material in our stock.

Route Name

Subcontracting

Applicable On

Select the places where this route can be selected

Product Categories	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>

Warehouses	<input type="checkbox"/>
------------	--------------------------

Push Rules

Source Location	Destination Location	Operation Name
Add an item		

Procurement Rules

Name	Action	Operation Type
Subcontracting	Manufacture	My Company: Subcontracting

Create a procurement rules that applied on WH/Stock location and ask WH/Contractor location to fulfil by creating a manufacturing order. This configuration will create the manufacturing order at Contractor location and looking for the

material at WH/Contractor location and once Tabletop produced it will be pushed to WH/Stock location.

Open: Procurement Rules

		<input checked="" type="checkbox"/> Active	
Name			
Subcontracting			
Action	Manufacture		
Applied On	Creates		
Procurement Location	WH/Stock	Source Location	WH/Contractor
	<input checked="" type="checkbox"/>	Operation Type	My Company: Subcontracting
	<input checked="" type="checkbox"/>		
SAVE	DISCARD		

To separate the contractor's manufacturing orders from the normal manufacturing orders you should create a new operation type which will be appeared on the warehouse dashboard.

Open: Operation Type

		<input checked="" type="checkbox"/> Active	
Operation Types Name	Subcontracting	Type of Operation	Manufacturing Operation
Reference Sequence	Subcontracting	<input checked="" type="checkbox"/>	
Locations			
Default Source Location	WH/Contractor	<input checked="" type="checkbox"/>	
Default Destination Location	WH/Stock	<input checked="" type="checkbox"/>	
SAVE	DISCARD		

Products

Let's create the Tabletop product and select the correct route on this product, select Subcontracting as this product is manufactured but at contractor location, we just need to supply them wooden and lamination sheet.

On Hand Forecasted Product Moves Reordering Rul... Bill of Materials Manufacturing Purchases Active

Product Name
Tabletop 

Can be Sold
 Can be Purchased

General Information Sales Purchase **Inventory** Invoicing Notes

Operations		Logistics	
Routes	<input type="checkbox"/> Material <input checked="" type="checkbox"/> Subcontracting <input type="checkbox"/> Manufacture <input type="checkbox"/> Buy <input type="checkbox"/> Make To Order	Weight	0.00 kg
Manufacturing Lead Time	5 days	Volume	0.00 m³
Customer Lead Time	0.00 days	Responsible	Administrator 

When you create a Wooden and Lamination sheet select the Material and Buy routs on those products.

On Hand Forecasted Product Moves Reordering Rul... Bill of Materials Manufacturing Purchases Active

Product Name
Wooden sheet 

Can be Sold
 Can be Purchased

General Information Sales Purchase **Inventory** Invoicing Notes

Operations		Logistics	
Routes	<input checked="" type="checkbox"/> Material <input type="checkbox"/> Subcontracting <input type="checkbox"/> Manufacture <input checked="" type="checkbox"/> Buy <input type="checkbox"/> Make To Order	Weight	0.00 kg
Manufacturing Lead Time	0.00 days	Volume	0.00 m³
Customer Lead Time	0.00 days	Responsible	Administrator 

When this products required at contractor location it will create the delivery order in our warehouse and when this product required in our warehouse we will buy it from the vendors.

Note: Define the vendor under the purchase tab and define the re-order level for both location WH/Stock and WH/Contractor depending on the needs.

Define the other raw material such as lags, table frame, bracket and bolt as stockable and define respective vendors and re-order level for each products. The bolt can be defined as consumable with the minimum stock level.

Bill of Material

Define two different bill or material one for Tabletop and second for the Table (final product).

Product: Tabletop
Quantity: 1.00
BoM Type: Manufacture this product
Components: Wooden sheet (1.00), Laminate sheet (1.00)
Miscellaneous: None
Add an item

Once you define the bill of material for Table it will be looking as below, print the BOM Structure form Print manu on the Table's bill of material.

BOM Structure

BOM Name	Quantity	BOM Ref
Table	1.00	
Tabletop	1.0	
Wooden sheet	1.0	
Laminate sheet	1.0	
Table frame	1.0	
Table lag	4.0	
Bracket	4.0	
Bolt	8.0	

Cost Structure

Make sure that you have configure the correct cost on each product to compute the cost of the finished and semi-finished raw material.

Table

1.0 Unit(s)

Cost Structure

Reference	Raw Materials	Quantity	Unit Cost	Total Cost
	Tabletop	1.000	\$ 80.00	\$ 80.00
	Table frame	1.000	\$ 25.00	\$ 25.00
	Table lag	4.000	\$ 12.00	\$ 48.00
	Bracket	4.000	\$ 4.00	\$ 16.00
	Bolt	8.000	\$ 0.50	\$ 4.00
Total Cost of Components				\$ 173.00

Let's add a new consumable product on the Table top bill of material to include the cost of contractor, I have considered that to produce each table top contractor will charge us \$5 as a service and delivery charges.

I have added that cost to the my Table top bill of material, and cost computed based on the components and service is not \$80.

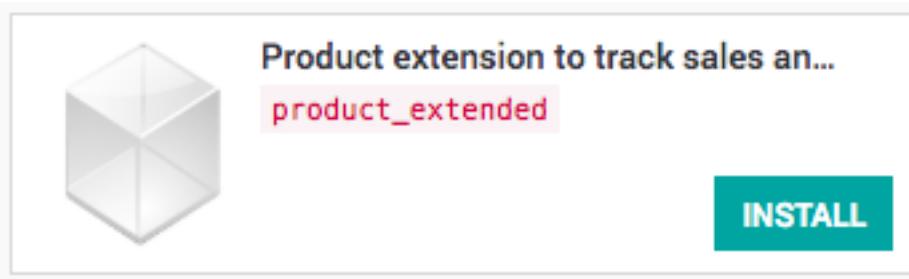
Tabletop

1.0 Unit(s)

Cost Structure

Reference	Raw Materials	Quantity	Unit Cost	Total Cost
	Wooden sheet	1.000	\$ 45.00	\$ 45.00
	Laminate sheet	1.000	\$ 30.00	\$ 30.00
	Contractor cost	1.000	\$ 5.00	\$ 5.00
Total Cost of Components				\$ 80.00

Tip: You can also install the Product extension to track sales and purchases app to compute the cost of the product based on the cost of material consumed.



Reorder Rules

Make sure that you defined the reorder rules for each product respectively to the locations. The reorder rules have to be defined for both WH/Stock and WH/Contractor location.

Reordering Rules		Warehouse	Location	Product	Minimum Quantity	Maximum Quantity
CREATE IMPORT						
<input type="checkbox"/>	Name					
▼ WH/Contractor (3)					0.000	0.000
	<input type="checkbox"/> OP/00005	My Company	WH/Contractor	Laminate sheet	0.000	0.000
	<input type="checkbox"/> OP/00007	My Company	WH/Contractor	Wooden sheet	0.000	0.000
	<input type="checkbox"/> OP/00009	My Company	WH/Contractor	Tabletop	0.000	0.000
▼ WH/Stock (6)					20.000	135.000
	<input type="checkbox"/> OP/00001	My Company	WH/Stock	Bracket	20.000	50.000
	<input type="checkbox"/> OP/00002	My Company	WH/Stock	Table frame	0.000	5.000
	<input type="checkbox"/> OP/00003	My Company	WH/Stock	Table lag	0.000	40.000
	<input type="checkbox"/> OP/00004	My Company	WH/Stock	Laminate sheet	0.000	20.000
	<input type="checkbox"/> OP/00006	My Company	WH/Stock	Wooden sheet	0.000	20.000
	<input type="checkbox"/> OP/00008	My Company	WH/Stock	Tabletop	0.000	0.000

Run the Scheduler from Inventory application, you should get the first request for quotation under the Purchase application as below.

Request for Quotation
PO00001

Vendor	China Export	Order Date	07/04/2018 00:01:23			
Vendor Reference		Source Document	OP/00006, OP/00001, OP/00004, OP/00003, OP/00002			
<input checked="" type="radio"/> Products <input type="radio"/> Deliveries & Invoices						
Product	Description	Scheduled Date	Quantity	Unit Price	Taxes	Subtotal
Wooden sheet	Wooden sheet	07/05/2018 00:01:23	20.000	45.00		\$ 900.00
Bracket	Bracket	07/05/2018 00:01:23	50.000	4.00		\$ 200.00
Laminate sheet	Laminate sheet	07/05/2018 00:01:23	20.000	30.00		\$ 600.00
Table lag	Table lag	07/05/2018 00:01:23	40.000	12.00		\$ 480.00
Table frame	Table frame	07/05/2018 00:01:23	10.000	25.00		\$ 250.00

[Add an item](#)

Define your terms and conditions ...

Untaxed Amount:	\$ 2,430.00
Taxes:	\$ 0.00
Total:	\$ 2,430.00

Confirm the purchase and receive the raw material to have the seamless test for the subcontracting business flow.

Manufacturing order

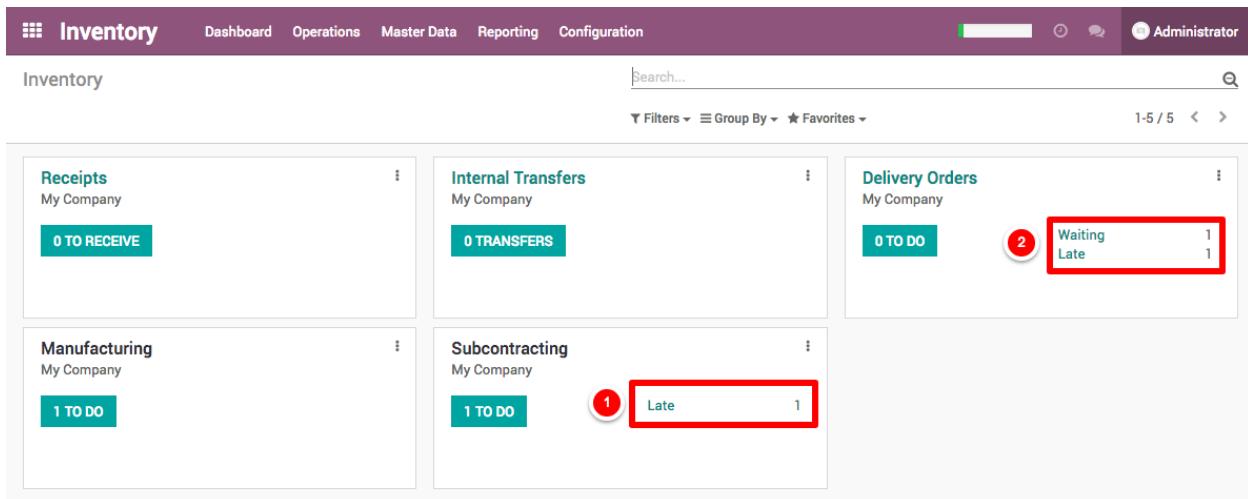
Everything is setup and now we are ready to test our first manufacturing order that triggers subcontracting flow. Create the manufacturing order for 1 Table, save and check on Check Availability button.

MO/00001

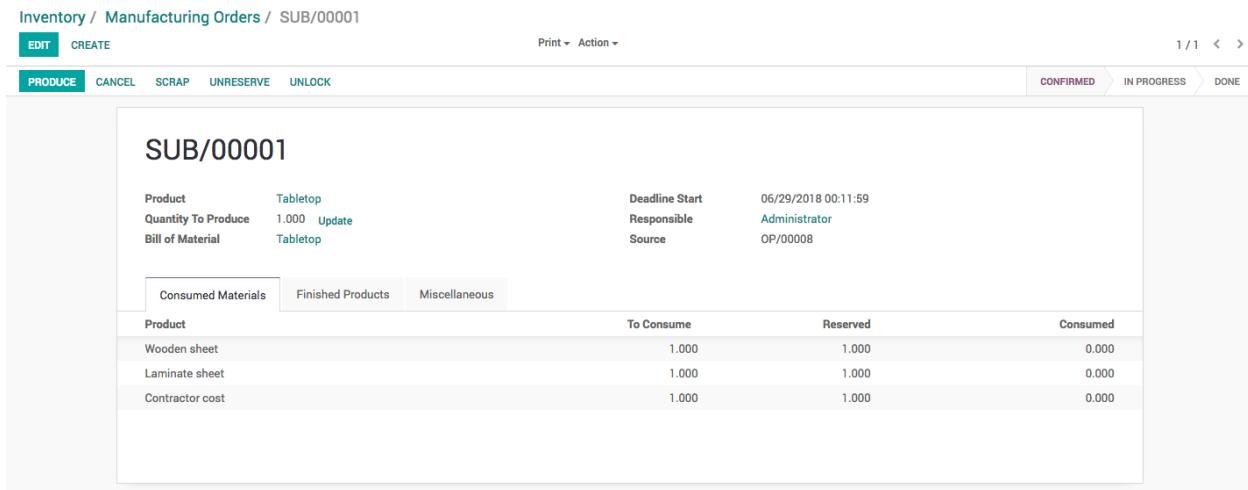
Product	Table	Update	Deadline Start	07/03/2018 00:10:05
Quantity To Produce	1.000		Responsible	Administrator
Bill of Material	Table		Source	
<input checked="" type="radio"/> Consumed Materials <input type="radio"/> Finished Products <input type="radio"/> Miscellaneous				
Product	To Consume	Reserved	Consumed	
Tabletop	1.000	0.000	0.000	
Table frame	1.000	1.000	0.000	
Table lag	4.000	4.000	0.000	
Bracket	4.000	4.000	0.000	
Bolt	8.000	8.000	0.000	

All the material except Tabletop will be marked as available.

Go to Inventory application and run the scheduler 2 times, you will notice after each scheduler run you will see the updates on the dashboard. First time it will create the manufacturing order at Subcontracting options and then delivery order on the Delivery operation.



Open the delivery order and process it, as soon as you process the manufacturing order at Contractor location will be ready to process.



Process and manufacturing the set it mask as done. When contractor's manufacturing order processed and mark as done, the Tabletop will be marked as received in our warehouse and we are ready to process the order for the Table in our factory.

The screenshot shows the Odoo Manufacturing Orders interface for a manufacturing order (MO) with ID MO/00001. The product is a 'Table'. The bill of material includes components like 'Tabletop', 'Table frame', 'Table lag', 'Bracket', and 'Bolt'. The consumption table shows the quantity required for each component: Tabletop (1.000), Table frame (1.000), Table lag (4.000), Bracket (4.000), and Bolt (8.000). The status bar at the top right indicates the order is 'CONFIRMED'.

Finally produce the table and set this manufacturing order as done by clicking on the Mark as Done button. Check the inventory level it has been looking as below.

<input type="checkbox"/> Product	Location	Reserved	On Hand
		0.00	130.00
<input type="checkbox"/> Wooden sheet	WH/Stock	0.00	19.00
<input type="checkbox"/> Bracket	WH/Stock	0.00	46.00
<input type="checkbox"/> Laminate sheet	WH/Stock	0.00	19.00
<input type="checkbox"/> Table lag	WH/Stock	0.00	36.00
<input type="checkbox"/> Table frame	WH/Stock	0.00	9.00
<input type="checkbox"/> Table	WH/Stock	0.00	1.00

Contractor Bill

Receive the vendor bill and create it manually.

Video

Access the video at https://www.youtube.com/watch?v=mms3U_2T8Nc

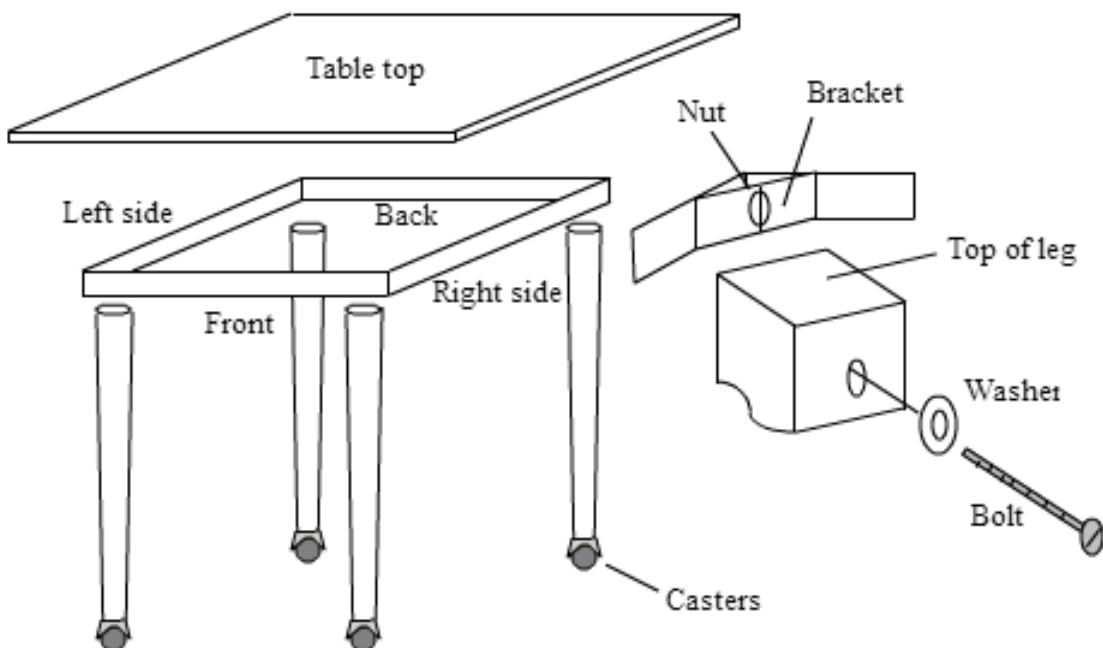
10.3.2 Setup subcontracting in manufacturing process (Dropship Material)

Most manufacturing companies outsource some part of the job contracting work to other manufacturing companies to get the best expertise methodology and resource to produce the world class product (i.e. Most reputed companies smart phones are assembled in China is the best example of the subcontracting).

In this document we will show you steps to setup the subcontracting business flow. Issue some raw material to your contractor from your warehouse and some raw material ask your vendor to make the direct delivery to contractor location.

Contractor will produce the semi-finished product which will be consumed later to prepare the final product in our factory.

Let's take an example of Table, to produce the table we need 1 table top and table frame, 4 lags and some consumable like bracket and bolt, assumed that table is laminated by third party contractor where we supply wood sheet and lamination sheet will be supplied by our vendor directly to prepare the laminated table top.



Configuration

Install manufacturing, purchase, inventory applications in order to create the full subcontracting flow.

Create location

By default production is the location where all the manufacturing order processed, all the material issued from stock location to Production location, and once production completed the final product pushed back to the stock location.

We need separate location which is not part of our warehouse, we will call it subcontracting. It will be easy to track the material issued to the subcontractor, also we can define reorder level on that location.

Tip: You can enable the multi location from Inventory / Configuration / Settings, select Storage Locations and apply the setting.

To create the location go to Inventory / Configuration / Location, create an internal location named as Contractor under the WH.

Locations / New

Contractor

Parent Location

WH

Additional Information

Location Type	Internal Location
Owner	None
Is a Scrap Location?	<input type="checkbox"/>
Is a Return Location?	<input type="checkbox"/>

Localization

Corridor (X)	0
Shelves (Y)	0
Height (Z)	0
Barcode	

Logistics

Removal Strategy	
Put Away Strategy	

Enable routes

Inventory route plays a key role to create the subcontracting flow, using routes we are able make the custom flow for the inventory, like Issue material to contractor and receive finished material from contractor.

To create the custom route go to Inventory / Configuration / Settings and select Multi-Step Routes, Storage Locations will be selected automatically.

Warehouse

Storage Locations
Track product location in your warehouse

Multi-Warehouses
Manage several warehouses

Multi-Step Routes
Use your own routes and putaway strategies

→ Set Warehouse Routes
→ Set Putaway Strategies on Locations

Let's create a two different routes, which can be selectable on the product routes

- Material - select this route on the product which can be issued to the contractor
- Subcontracting - select this route when you want contractor to be product and send it to our warehouse (stock location)

Material Route (Buy and Deliver)

Material route, select Product and Product Category under the Applicable On options.

Route Name

Material (Buy -> Deliver)**Applicable On**

Select the places where this route can be selected

Product Categories	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>

Warehouses

**Push Rules**

Source Location

Destination Location

Operation Name

[Add an item](#)**Procurement Rules**

Name	Action	Operation Type
+ Issue Material	Move From Another Location	My Company: Delivery Orders
Add an item		

Create a Procurement that applied on the Contractor location and ask our Stock location to fulfill the requirement by stock transfer.

Open: Procurement Rules



Name

Issue Material

Action

Move From Another Location

**Applied On**

Procurement Location

WH/Contractor

Creates

Source Location

WH/Stock



Move Supply Method

Take From Stock



Operation Type

My Company: Delivery Orders



Partner Address

Delay

2

days

[SAVE & CLOSE](#)[SAVE & NEW](#)[DISCARD](#)

Tip: Material Route (Buy and Deliver) route first check the material at WH/Stock location and buy when enough stock is not available.

Material Route (Dropship)

Material route, select Product and Product Category under the Applicable On options.

Material (Dropship)

Applicable On

Select the places where this route can be selected

Product Categories	<input type="checkbox"/>	Warehouses	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>		

Push Rules

Source Location	Destination Location	Operation Name

Procurement Rules

Name	Action	Operation Type
Purchase	Buy	My Company: Direct Delivery

Create a Procurement that perform the Buy operation when stock or product is not available at WH/Contractor location.

Open: Procurement Rules ×

		Active
Name		
Purchase		
Action	Buy	
Applied On		Creates
Procurement Location	WH/Contractor	Operation Type
		My Company: Direct Delivery
<input type="button" value="SAVE"/> <input type="button" value="DISCARD"/>		

Tip: Material Route (Dropship) route first check the material at WH/Stock location and buy when enough stock is not available.

Subcontracting Route

Same way create second route “Subcontracting” that create a manufacturing order at contractor location when we need that semi-finished material in our stock.

Route Name

Subcontracting

Applicable On

Select the places where this route can be selected

Product Categories
 Products

Warehouses

Push Rules

Source Location

Destination Location

Operation Name

Add an item

Procurement Rules

Name	Action	Operation Type	
⊕ Subcontracting	Manufacture	My Company: Subcontracting	
Add an item			

Create a procurement rules that applied on WH/Stock location and ask WH/Contractor location to fulfil by creating a manufacturing order. This configuration will create the manufacturing order at Contractor location and looking for the material at WH/Contractor location and once Tabletop produced it will be pushed to WH/Stock location.

Open: Procurement Rules ×

Active

Name

Subcontracting

Action

Manufacture

Applied On

Procurement Location

WH/Stock

Creates

Source Location

WH/Contractor

Operation Type

My Company: Subcontracting

SAVE **DISCARD**

To separate the contractor's manufacturing orders from the normal manufacturing orders you should create a new operation type which will be appeared on the warehouse dashboard.

Open: Operation Type

<input checked="" type="checkbox"/> Active	X
Operation Types Name: Subcontracting Reference Sequence: Subcontracting	
Type of Operation:	Manufacturing Operation
Locations Default Source Location: WH/Contractor Default Destination Location: WH/Stock	
SAVE DISCARD	

Products

Let's create the Tabletop product and select the correct route on this product, select Subcontracting as this product is manufactured but at contractor location, we just need to supply them wooden and lamination sheet.

Cost Analysis	On Hand	Forecasted	Product Moves	Reordering Rule	Bill of Materials	Used In	More
Product Name: Tabletop 							
<input checked="" type="checkbox"/> Can be Sold <input checked="" type="checkbox"/> Can be Purchased							
General Information Sales Purchase Inventory Invoicing Notes							
Operations Routes: <input type="checkbox"/> Material (Buy -> Deliver) <input type="checkbox"/> Material (Dropship) <input checked="" type="checkbox"/> Subcontracting <input type="checkbox"/> Buy <input type="checkbox"/> Manufacture <input type="checkbox"/> Make To Order				Logistics Weight: 0.00 kg Volume: 0.00 m³ Responsible: Administrator			
Manufacturing Lead Time: 5.00 days		Customer Lead Time: 0.00 days					

When you create a Wooden sheet select the Material (Buy -> Deliver) and Buy routes.

On Hand: 20 | Forecasted: 20 | Product Moves: 2 | Reordering Rule: 0 | Bill of Materials: 1 | Used In: 0 | Manufacturing: 0 | More ▾

Product Name
Wooden sheet

Can be Sold
 Can be Purchased

General Information | Sales | Purchase | **Inventory** | Invoicing | Notes

Operations

Routes	<input checked="" type="checkbox"/> Material (Buy -> Deliver) <input type="checkbox"/> Material (Dropship) <input type="checkbox"/> Subcontracting <input checked="" type="checkbox"/> Buy <input type="checkbox"/> Manufacture <input type="checkbox"/> Make To Order
--------	---

Manufacturing Lead Time: 0.00 days
Customer Lead Time: 0.00 days

Logistics

Weight	0.00	kg
Volume	0.00	m³
Responsible	Administrator	dropdown

When you create a Lamination sheet select the Material (Dropship) route.

On Hand: 0 | Forecasted: 0 | Product Moves: 2 | Reordering Rule: 0 | Bill of Materials: 1 | Used In: 0 | Manufacturing: 0 | More ▾

Product Name
Laminate sheet

Can be Sold
 Can be Purchased

General Information | Purchase | **Inventory** | Invoicing | Notes

Operations

Routes	<input type="checkbox"/> Material (Buy -> Deliver) <input checked="" type="checkbox"/> Material (Dropship) <input type="checkbox"/> Subcontracting <input type="checkbox"/> Buy <input type="checkbox"/> Manufacture <input type="checkbox"/> Make To Order
--------	--

Manufacturing Lead Time: 0.00 days
Customer Lead Time: 0.00 days

Logistics

Weight	0.00	kg
Volume	0.00	m³
Responsible	Administrator	dropdown

Depending on the product routes will be applied, delivery and purchase order will be created for the Wooden sheet while Lamination sheet will create the purchase order and direct delivery from vendor location.

Note: Define the vendor under the purchase tab and define the re-order level for location WH/Stock and WH/Contractor depending on the needs.

Define the other raw material such as lags, table frame, bracket and bolt as stockable and define respective vendors and re-order level for each products. The bolt can be defined as consumable with the minimum stock level.

Bill of Material

Define two different bill of material one for Tabletop and second for the Table (final product).

Product	Tabletop	Reference	<input checked="" type="checkbox"/> Manufacture this product
Quantity	1.00	BoM Type	<input type="radio"/> Kit
<input checked="" type="radio"/> Components <input type="radio"/> Miscellaneous			
Product		Product Quantity	
+ Wooden sheet		1.000 <input type="checkbox"/>	
+ Laminate sheet		1.000 <input type="checkbox"/>	
Add an item			

Once you define the bill of material for Table it will be looking as below, print the BOM Structure form Print manu on the Table's bill of material.

BOM Structure

BOM Name	Quantity	BOM Ref
Table	1.00	
Tabletop	1.0	
Wooden sheet	1.0	
Laminate sheet	1.0	
Table frame	1.0	
Table lag	4.0	
Bracket	4.0	
Bolt	8.0	

Cost Structure

Make sure that you have configure the correct cost on each product to compute the cost of the finished and semi-finished raw material.

Table

1.0 Unit(s)

Cost Structure

Reference	Raw Materials	Quantity	Unit Cost	Total Cost
	Tabletop	1.000	\$ 80.00	\$ 80.00
	Table frame	1.000	\$ 25.00	\$ 25.00
	Table lag	4.000	\$ 12.00	\$ 48.00
	Bracket	4.000	\$ 4.00	\$ 16.00
	Bolt	8.000	\$ 0.50	\$ 4.00
Total Cost of Components				\$ 173.00

Let's add a new consumable product on the Table top bill of material to include the cost of contractor, I have considered that to produce each table top contractor will charge us \$5 as a service and delivery charges.

I have added that cost to the my Table top bill of material, and cost computed based on the components and service is not \$80.

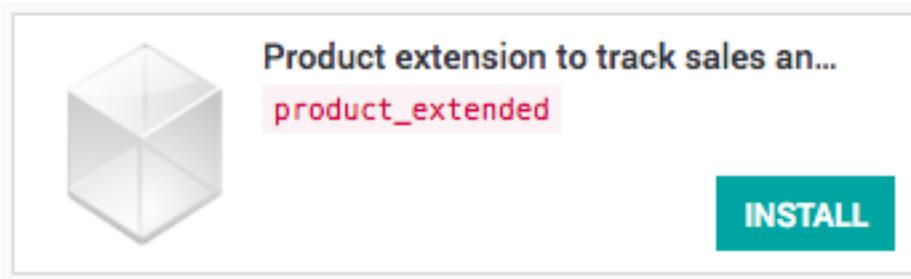
Tabletop

1.0 Unit(s)

Cost Structure

Reference	Raw Materials	Quantity	Unit Cost	Total Cost
	Wooden sheet	1.000	\$ 45.00	\$ 45.00
	Laminate sheet	1.000	\$ 30.00	\$ 30.00
	Contractor cost	1.000	\$ 5.00	\$ 5.00
Total Cost of Components				\$ 80.00

Tip: You can also install the Product extension to track sales and purchases app to compute the cost of the product based on the cost of material consumed.



Reorder Rules

Make sure that you defined the reorder rules for each product respectively to the locations. The reorder rules have to be defined for both WH/Stock and WH/Contractor location.

Reordering Rules		Warehouse	Location	Product	Minimum Quantity	Maximum Quantity
CREATE IMPORT						
▼ WH/Contractor (3)					0.000	0.000
		OP/00005	My Company	WH/Contractor	Laminate sheet	0.000
		OP/00007	My Company	WH/Contractor	Wooden sheet	0.000
		OP/00009	My Company	WH/Contractor	Tabletop	0.000
▼ WH/Stock (6)					20.000	135.000
		OP/00001	My Company	WH/Stock	Bracket	20.000
		OP/00002	My Company	WH/Stock	Table frame	0.000
		OP/00003	My Company	WH/Stock	Table lag	0.000
		OP/00004	My Company	WH/Stock	Laminate sheet	0.000
		OP/00006	My Company	WH/Stock	Wooden sheet	0.000
		OP/00008	My Company	WH/Stock	Tabletop	0.000

Run the Scheduler from Inventory application, you should get the first request for quotation under the Purchase application as below.

Request for Quotation
PO00001

Vendor	China Export	Order Date	07/04/2018 00:01:23			
Vendor Reference		Source Document	OP/00006, OP/00001, OP/00004, OP/00003, OP/00002			
<input checked="" type="radio"/> Products <input type="radio"/> Deliveries & Invoices						
Product	Description	Scheduled Date	Quantity	Unit Price	Taxes	Subtotal
Wooden sheet	Wooden sheet	07/05/2018 00:01:23	20.000	45.00		\$ 900.00
Bracket	Bracket	07/05/2018 00:01:23	50.000	4.00		\$ 200.00
Laminate sheet	Laminate sheet	07/05/2018 00:01:23	20.000	30.00		\$ 600.00
Table lag	Table lag	07/05/2018 00:01:23	40.000	12.00		\$ 480.00
Table frame	Table frame	07/05/2018 00:01:23	10.000	25.00		\$ 250.00

[Add an item](#)

Define your terms and conditions ...

Untaxed Amount:	\$ 2,430.00
Taxes:	\$ 0.00
Total:	\$ 2,430.00

Confirm the purchase and receive the raw material to have the seamless test for the subcontracting business flow.

Manufacturing order

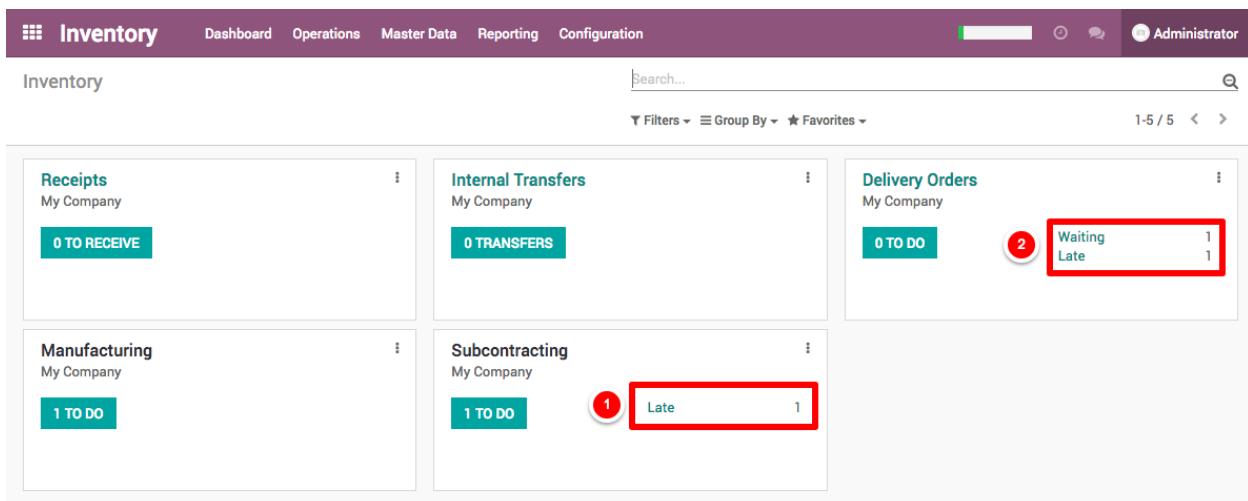
Everything is setup and now we are ready to test our first manufacturing order that triggers subcontracting flow. Create the manufacturing order for 1 Table, save and check on Check Availability button.

MO/00001

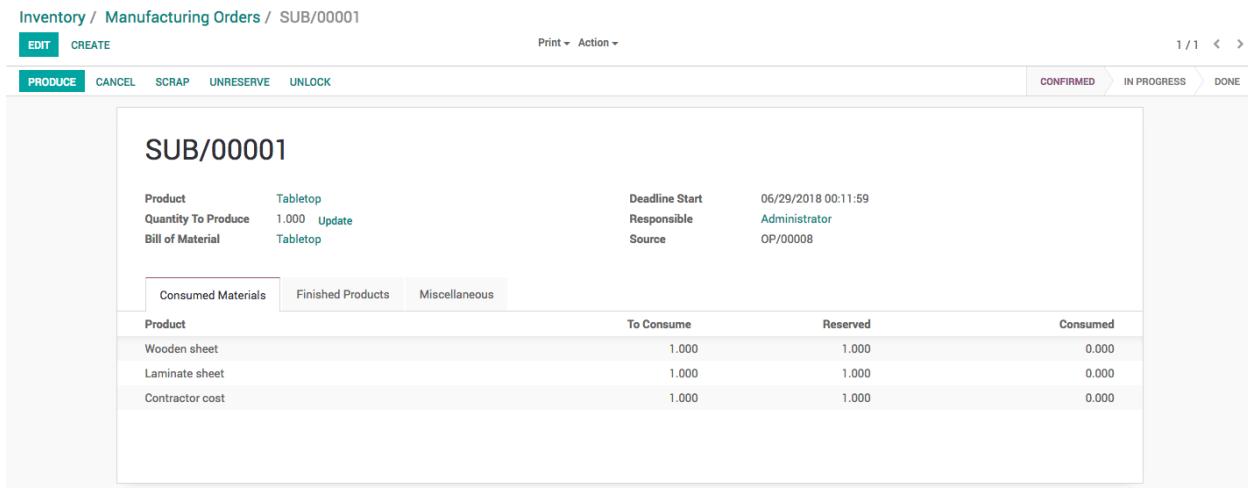
Product	Table	Update	Deadline Start	07/03/2018 00:10:05
Quantity To Produce	1.000		Responsible	Administrator
Bill of Material	Table		Source	
<input checked="" type="radio"/> Consumed Materials <input type="radio"/> Finished Products <input type="radio"/> Miscellaneous				
Product	To Consume	Reserved	Consumed	
Tabletop	1.000	0.000	0.000	
Table frame	1.000	1.000	0.000	
Table lag	4.000	4.000	0.000	
Bracket	4.000	4.000	0.000	
Bolt	8.000	8.000	0.000	

All the material except Tabletop will be marked as available.

Go to Inventory application and run the scheduler 2 times, you will notice after each scheduler run you will see the updates on the dashboard. First time it will create the manufacturing order at Subcontracting options and then delivery order on the Delivery operation.



Open the delivery order and process it, as soon as you process the manufacturing order at Contractor location will be ready to process.



Process and manufacturing the set it mask as done. When contractor's manufacturing order processed and mark as done, the Tabletop will be marked as received in our warehouse and we are ready to process the order for the Table in our factory.

The screenshot shows the Odoo Manufacturing Orders interface for Manufacturing Order MO/00001. The top navigation bar includes 'Manufacturing Orders / MO/00001', 'EDIT' (highlighted), 'CREATE', 'Print', 'Action', 'PRODUCE' (highlighted), 'CANCEL', 'SCRAP', 'UNRESERVE', 'UNLOCK', and status indicators 'CONFIRMED', 'IN PROGRESS', and 'DONE'. The main content area displays the order details: Product 'Table', Quantity To Produce '1.000', Bill of Material 'Table' (with a 'Update' link). It also shows the Deadline Start as '07/03/2018 00:10:05', Responsible 'Administrator', and Source. Below this is a table showing consumed materials:

Consumed Materials	Product	To Consume	Reserved	Consumed
	Tabletop	1.000	1.000	0.000
	Table frame	1.000	1.000	0.000
	Table lag	4.000	4.000	0.000
	Bracket	4.000	4.000	0.000
	Bolt	8.000	8.000	0.000

Finally produce the table and set this manufacturing order as done by clicking on the Mark as Done button. Check the inventory level it has been looking as below.

<input type="checkbox"/> Product	Location	Reserved	On Hand
		0.00	130.00
<input type="checkbox"/> Wooden sheet	WH/Stock	0.00	19.00
<input type="checkbox"/> Bracket	WH/Stock	0.00	46.00
<input type="checkbox"/> Laminate sheet	WH/Stock	0.00	19.00
<input type="checkbox"/> Table lag	WH/Stock	0.00	36.00
<input type="checkbox"/> Table frame	WH/Stock	0.00	9.00
<input type="checkbox"/> Table	WH/Stock	0.00	1.00

Contractor Bill

Receive the vendor bill and create it manually.

Video

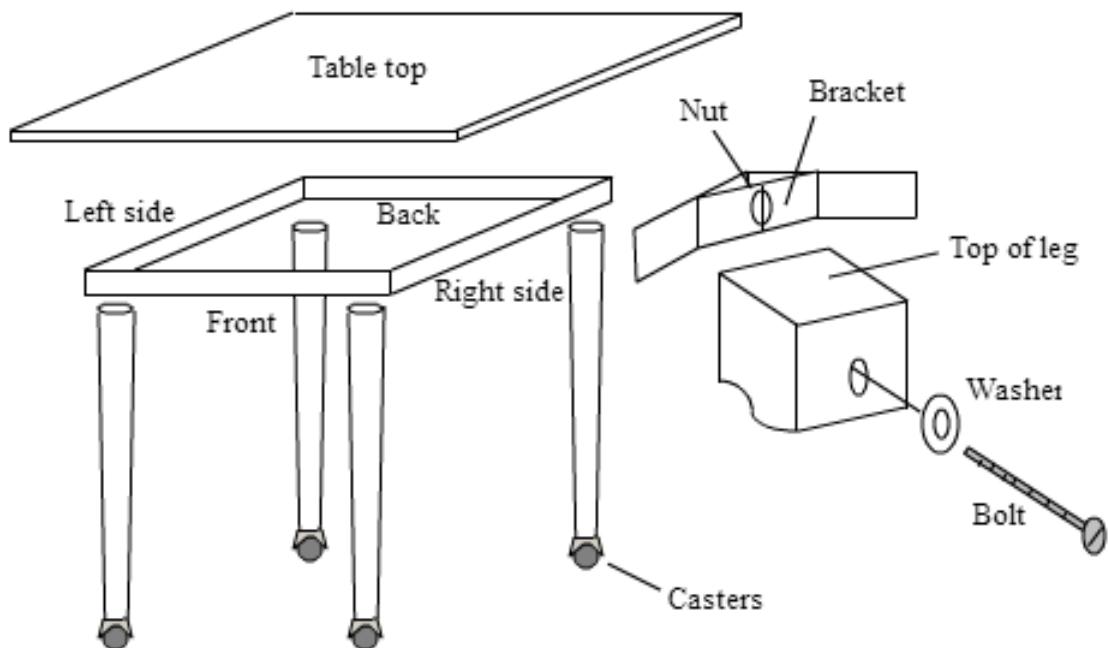
Access the video at <https://www.youtube.com/watch?v=esoHqzckMxI>

10.3.3 Subcontracting process for contractors

Like we *setup subcontracting in manufacturing process* for companies who outsource the contracting work, the contractor need the setup at other side, he get the requirement form factory to perform the some part of the final product. The outsourcing company send the raw material to build the product and pay for the job work done.

In this document we will show you steps to setup the subcontracting business flow for the contractors, get the raw material to and produce the semi-finished product delivery the product get paid for the job work done.

Let's take an example of Table, to produce the table we need 1 table top and table frame, 4 lags and some consumable like bracket and bolt, assumed that tabletop is laminated by third party contractor by us, we get the wood sheet and lamination sheet to prepare the laminated table top.



Configuration

Install **Sales Management**, **Manufacturing** applications, the **Inventory Management** and **Invoicing** applications will be installed automatically.

Setup Inventory

In order to setup the contractors workflow the multiple warehouse and some custom routes is required, lets enable them from the **Inventory** application. Go to **Inventory / Configuration / Settings** and activate the **Multi-Warehouses** and **Multi-Step Routes** the **Storage Locations** will be selected automatically.

Warehouse

<input checked="" type="checkbox"/> Storage Locations Track product location in your warehouse → Locations	<input checked="" type="checkbox"/> Multi-Warehouses Manage several warehouses → Warehouses
<input checked="" type="checkbox"/> Multi-Step Routes Use your own routes and putaway strategies → Set Warehouse Routes → Set Putaway Strategies on Locations	

Create Warehouse

In order to separate the internal and outsource manufacturing orders we need to setup the other warehouse, the default warehouse we will use as an internal and new warehouse we will setup as a **Factory** where we will process all the outsourcing orders.

The screenshot shows the Odoo warehouse creation interface. At the top, there are buttons for 'Routes' and 'Active'. Below that, the 'Warehouse Name' field contains 'Factory'. Under 'Short Name', the value 'FT' is entered. In the 'Address' field, 'My Company' is selected. A 'Warehouse Configuration' tab is open, showing settings for 'Incoming Shipments' (radio buttons for receiving goods directly or via quality control) and 'Outgoing Shipments' (radio buttons for shipping directly from stock or via pick + ship). The 'Manufacture in this Warehouse' checkbox is checked. The 'Default Resupply Warehouse' dropdown is empty. Under 'Resupply Warehouses', the 'My Company' checkbox is checked. There is also a small 'Edit' icon in the top right corner of the form.

You should get the 8 inventory operations on the Inventory dashboard, 4 operations for each warehouse. i.e. *Receipts*, *Internal Transfer*, *Delivery Orders* and *Manufacturing*.

Tip: Make sure that you keep selected for *Manufacture in this Warehouse* field on the warehouse.

Create Material Route

The contractor flow is same as the standard manufacturing process, where we create a manufacturing order and buy the material on demand through purchase process. In this process we have to ask customer who provide us the manufacturing job, the material we will get we do not have to pay for it as it does not come through purchase process.

We will create a new route *Material* which should be selected on the product, which is going to be supplied by the customer along with the contracting order.

Go to *Inventory / Configuration / Routes*, create a new route called *Material*

		<input checked="" type="checkbox"/> Active
Route Name Material		
Applicable On Select the places where this route can be selected		
Product Categories <input type="checkbox"/>		Warehouses <input type="checkbox"/>
Products <input checked="" type="checkbox"/>		

Create a *Procurement Rules* that moves the material from *Vendor Location* to *Factory Stock* location, select *Factory: Receipts* on **Operation Type** as an incoming shipment should be created under that operation.

Open: Procurement Rules ×		
<input checked="" type="checkbox"/> Active		
Name Procure material		
Action	Move From Another Location ▼	
Applied On		
Procurement Location	FT/Stock	✖
Creates		
Source Location	Partner Locations/Vendors ✖	
Move Supply Method	Take From Stock ▼	
Operation Type	Factory: Receipts ✖	
Partner Address		
Delay	0	days
SAVE & CLOSE SAVE & NEW DISCARD		

Products

Let's create the *Tabletop* product, it is *Stockable Product* product, select the *Manufacturing* and *Make to Order* routes. The manufacturing order for the tabletop will be created when we have a job order.

	0 On Hand	0 Forecasted	Product Moves	0 Reordering Rul...	0 Bill of Materials	0 Manufacturing	Active
Product Name	Tabletop						
<input checked="" type="checkbox"/> Can be Sold <input checked="" type="checkbox"/> Can be Purchased							
General Information		Sales	Inventory	Notes			
Operations Routes <input type="checkbox"/> Material <input checked="" type="checkbox"/> Manufacture <input checked="" type="checkbox"/> Make To Order Manufacturing Lead Time 5.00 days Customer Lead Time 7.00 days				Logistics Weight 0.00 kg Volume 0.00 m³ Responsible Administrator			

The **Sales Price** on the *Tabletop* product is actually the cost of the production and not the cost Tabletop. When we sell the *Tabletop* we actually sell the job work to produce the *Tabletop*.

Note: Set the **Manufacturing Lead Time** to 5 and **Customer Lead Time** to 7. This will used to compute the schedule dates for the manufacturing order, delivery order.

Create a Wooden and Lamination sheet and select the *Material* and *Make to Order* routes on those products.

	0 On Hand	0 Forecasted	Product Moves	0 Reordering Rul...	0 Bill of Materials	0 Manufacturing	Active
Product Name	Wooden sheet						
<input type="checkbox"/> Can be Sold <input checked="" type="checkbox"/> Can be Purchased							
General Information		Inventory	Notes				
Operations Routes <input checked="" type="checkbox"/> Material <input type="checkbox"/> Manufacture <input checked="" type="checkbox"/> Make To Order Manufacturing Lead Time 0.00 days Customer Lead Time 0.00 days				Logistics Weight 0.00 kg Volume 0.00 m³ Responsible Administrator			

Bill of Material

Define the bill or material for *Tabletop*, that consume *Wooden sheet* and *Laminated sheet* as a raw material.

Product: Tabletop | Reference: Tabletop 8X4 FT^{*}

Quantity: 1.00 | BoM Type: Manufacture this product

Product	Product Quantity
Wooden sheet	1.000
Laminated sheet	1.000

Add an item

During the manufacturing, contractor cares about the cost of the service and resources such as electricity and manpower and machine. Set the cost of the material to 0 and add those cost as a consumable product on the bill of material. At the end of the manufacturing process you will get the exact cost of the job work.

Reorder Rules

We don't need any reorder rules as all the material will be procured on demand from the customer.

Sale Order

Let's assume that we receive the work order to prepare the 10 *Tabletop* form *China Export*.

SO001

Customer: China Export | Expiration Date: | Payment Terms: |

Order Lines	Other Information
Product: Tabletop Description: Tabletop Ordered Qty: 10.000 Unit Price: 1.00 Taxes: Subtotal: \$ 10.00	

Add an item

Setup default terms and conditions in your sales settings ...

Untaxed Amount:	\$ 10.00
Taxes:	\$ 0.00
Total:	\$ 10.00

Tip: You will find two Delivery attached to the Sales order, one is the actual delivery order while second it the incoming shipment which ask for the material to supply form the customer to build the Tabletop.

The *Unit price* is the price for the job work to produce for each table. Make sure that you change the **Warehouse** to *Factory* as we process all the outsourcing work in that warehouse.

SO001

Customer	<input type="text" value="China Export"/>	Expiration Date												
		Payment Terms												
<input type="button" value="Order Lines"/> <input type="button" value="Other Information"/>														
Shipping Information <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Warehouse</td> <td style="width: 50%;"><input type="text" value="Factory"/></td> </tr> <tr> <td>Shipping Policy</td> <td><input type="text" value="My Company"/></td> </tr> <tr> <td></td> <td><input type="text" value="Factory"/></td> </tr> </table>		Warehouse	<input type="text" value="Factory"/>	Shipping Policy	<input type="text" value="My Company"/>		<input type="text" value="Factory"/>	Sales Information <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Salesperson</td> <td style="width: 50%; text-align: right;">Administrator</td> </tr> <tr> <td>Sales Channel</td> <td style="text-align: right;">Sales</td> </tr> <tr> <td></td> <td style="text-align: right;">Customer Reference</td> </tr> </table>	Salesperson	Administrator	Sales Channel	Sales		Customer Reference
Warehouse	<input type="text" value="Factory"/>													
Shipping Policy	<input type="text" value="My Company"/>													
	<input type="text" value="Factory"/>													
Salesperson	Administrator													
Sales Channel	Sales													
	Customer Reference													
Invoicing <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Order Date</td> <td style="width: 50%; text-align: right;">07/10/2018 23:12:11</td> </tr> <tr> <td>Fiscal Position</td> <td></td> </tr> </table>				Order Date	07/10/2018 23:12:11	Fiscal Position								
Order Date	07/10/2018 23:12:11													
Fiscal Position														

Confirm the order, it creates the *Delivery Order* and *Manufacturing order* and *Receipts* in the Factory warehouse.

Inventory Search... 1-8 / 8 < >

Receipts My Company 0 TO RECEIVE	Internal Transfers My Company 0 TRANSFERS	Delivery Orders My Company 0 TO DO
Manufacturing My Company 0 TO DO	Receipts Factory 1 TO RECEIVE 3	Internal Transfers Factory 0 TRANSFERS
Delivery Orders Factory 0 TO DO 1 Waiting 1	Manufacturing Factory 1 TO DO 2 Waiting 1	

Manufacturing Order

The sales order creates the delivery order, that triggers manufacturing order and that triggers reception order. The complete flow is triggered through Make to order route so you have **SO001** in **Source Document** on delivery, manufacturing and incoming shipment.

FT/IN/00001

Partner	China Export	Scheduled Date	07/12/2018 23:17:40
Source Location	Partner Locations/Vendors	Source Document	S0001
<input type="button" value="Operations"/> <input type="button" value="Additional Info"/>			
Product Wooden sheet Laminated sheet Add an item		Initial Demand	Done
10.000		10.000	0.000
10.000		10.000	0.000

When you have a multiple orders from different customers, manufacturing orders will be ready to produce only for the customer who supply the material.

MO/00001

Product	Tabletop	Deadline Start	07/12/2018 23:17:40
Quantity To Produce	10.000 Update	Responsible	Administrator
Bill of Material	Tabletop 8X4 FT": Tabletop	Source	S0001
<input type="button" value="Consumed Materials"/> <input type="button" value="Finished Products"/> <input type="button" value="Miscellaneous"/>			
Product Wooden sheet Laminated sheet		To Consume	Reserved
10.000		10.000	0.000
10.000		10.000	0.000

Let's process the incoming shipment at reception and process the manufacturing order. The delivery order will be ready when manufacturing order completed.

Job work Invoice

You are ready to prepare the send the invoice for the job work once the delivery done. Create an invoice and send it to customer, this is the an invoice for the job work and not for the selling of the Tabletop.

Invoice Number:
INV/2018/0002

Customer	China Export	Invoice Date	07/10/2018
Payment Terms		Due Date	07/10/2018
		Salesperson	Administrator
		Sales Channel	Sales

Invoice Lines **Other Info**

Product	Description	Quantity	Unit Price	Taxes	Subtotal
Tabletop	Tabletop	10.000	20.00		\$ 200.00
Add an item					

Untaxed Amount: \$ 200.00
Tax: \$ 0.00
Total: **\$ 200.00**

Tip: You can set the Invoicing Policy on the Tabletop product that takes care for the invoicing process.

Video

Access the video at https://www.youtube.com/watch?v=JPHB5_DiZfI

CHAPTER 11

Human Resource

11.1 Employee

11.1.1 Show organizational chart on employee form

Video

Access the video at <https://www.youtube.com/watch?v=NpXoieYwb7I>

11.1.2 Managing Employee Leaves

Planning and forecasting tasks and projects required the updated information for the resource availability. Leave management application helps to provide the updated information for employee unavailability. Leave management application in Odoo can be used independant or integrated with Project Forecasting application for the better planning of any long term project.

There are many business cases where tracking of employee leaves are necessary, let's see how Odoo Leaves application will answer all those business cases.

Business case

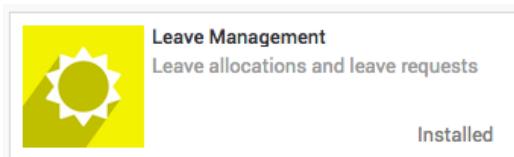
The types of leave and number of leave available for each leave types are as below in our business case.

- The leave cycle starts from January 2018
- Working schedule for all the employees are morning 8 am to 5 pm with 1 hour of lunch break
- Full time employees have 12 Legal leaves for the year 2018
- Part time employees have 12 half leaves for the year 2018
- All employees are eligible to get the 6 Sick Leaves during the year 2018, however employees can have more sick leaves if needed with medical certificates

- Employee can have the Compensatory Days off in some cases where employee have worked on off days
- Let's configure all the above business cases in Odoo and get the updated leave information for all the employees.

Configuration

Install the Leaves application from Apps menu on your instance, only an Administrator user can perform installation operation.



Make sure that you have a updated leave policy ready, let's take a business case and configure the number of leave available to each employees for each leave types.

Working schedule

As per business case the working schedule for all the employees are morning 8 am to 5 pm with 1 hour of lunch break. To configure the working schedule please goto *Settings* → *Technical* → *Resources* → *Working Time*, create a one if the default working schedule does not meet your requirement.

The screenshot shows the 'Working Time' configuration screen. At the top, there are two tabs: 'Leaves' and 'Work Resources'. Below the tabs, the title 'Standard 40 Hours/Week' is displayed. The main area is a table with the following columns: Name, Day of Week, Work from, Work to, Starting Date, and End Date. The table lists daily work shifts from Monday Morning to Friday Evening. The 'Starting Date' and 'End Date' columns are empty for all rows. An 'Add an item' button is located at the bottom left of the table.

Name	Day of Week	Work from	Work to	Starting Date	End Date
Monday Morning	Monday	08:00	12:00		
Monday Evening	Monday	13:00	17:00		
Tuesday Morning	Tuesday	08:00	12:00		
Tuesday Evening	Tuesday	13:00	17:00		
Wednesday Morning	Wednesday	08:00	12:00		
Wednesday Evening	Wednesday	13:00	17:00		
Thursday Morning	Thursday	08:00	12:00		
Thursday Evening	Thursday	13:00	17:00		
Friday Morning	Friday	08:00	12:00		
Friday Evening	Friday	13:00	17:00		

I have created the Standard 40 Hours/Week schedule, almost all the employees are working under this schedule. Leave the **Starting Date** and **End Date** empty if you would like to use this schedule throughout the year or until the changes required in working time.

Default Working Schedule

This can be set as a default working schedule for every new employee created in the system, goto *Configurations* → *Settings* under the **Employees** application.

Settings

SAVE **DISCARD**

Employees

General Settings

Work Organization

Company Working Hours
Set default calendar used to compute time allocation for leaves, timesheets, ...

Standard 40 Hours/Week

- Standard 40 Hours/Week
- Standard 35 Hours/Week
- Standard 38 Hours/Week
- [Create and Edit...](#)

Show Organizational Chart
Show organizational chart on employee form.

Warning: Changing the **Company Working Hours** will not change the working schedule for the existing employees, the new employees created after the change will have this working schedule as a default.

When you have a new employee joining in the company, the default company working hours will be applied to that employee, however it can be change if required for the specific employees at the time of creation or later.

New Employee

Name: Active

e.g. Part Time

Work Information **Private Information** **HR Settings**

Contact Information

Work Address	My Company	<input checked="" type="checkbox"/>
Work Location	<input type="text"/>	
Work Email	<input type="text"/>	
Work Mobile	<input type="text"/>	
Work Phone	<input type="text"/>	

Other Information ...

Position

Department	<input type="text"/>
Job Position	<input type="text"/>
Manager	<input type="text"/>
Coach	<input type="text"/>
Working Hours	<input checked="" type="checkbox"/>

Standard 40 Hours/Week

- Standard 40 Hours/Week
- Standard 35 Hours/Week
- Standard 38 Hours/Week
- [Create and Edit...](#)

Employees number of leaves also required to compute the salary statement for every month so that unpaid leaves can be deducted from the salary.

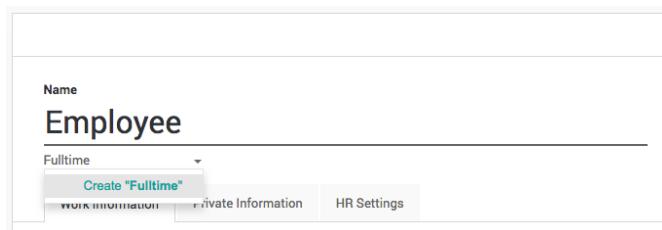
Tip: The working schedule can be change for specific employees directly on the employee configuration.

Employee Tags

Create an associate employee with tags are an important feature that allows us to automate allocation of leave quickly, the leave can be allocated either by Employee or by Tags, immagin when you have thousand of employees and you have to assign different types of leaves. When you work by Employee it increase a lots of work for the HR office or manager.

Create and assign the tags to the employee carefully, as based on the tags leaves will be allocated. In our business case we will create a **Fulltime** and **Parttime** two different tags to differentiate the employees at the time of leave allocation.

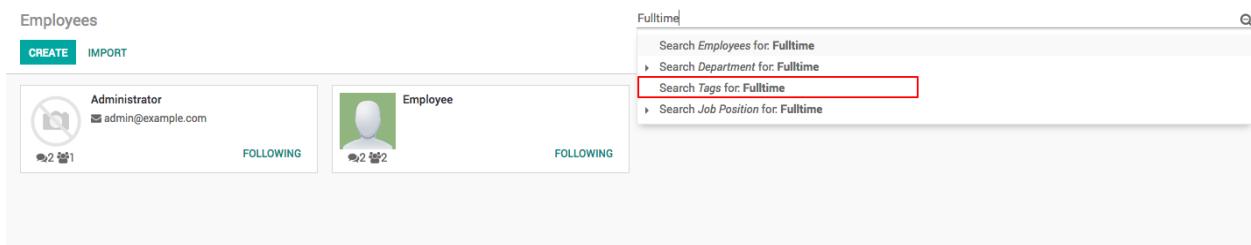
The simplest way to create the tags is directly from the employee form, just type the tag name and choose option to create that tag with Odoo's quick create feature.



Click on Create “Fulltime” link to create and assign created tag to new employee being created.

Note: You can assign multiple tags to the employee that helps you to group the employees and search them quickly when needed.

You can verify the list of employees for the correct assignation of tags from the employee directory. Goto Employees and enter **Fulltime** and search for the Tags.

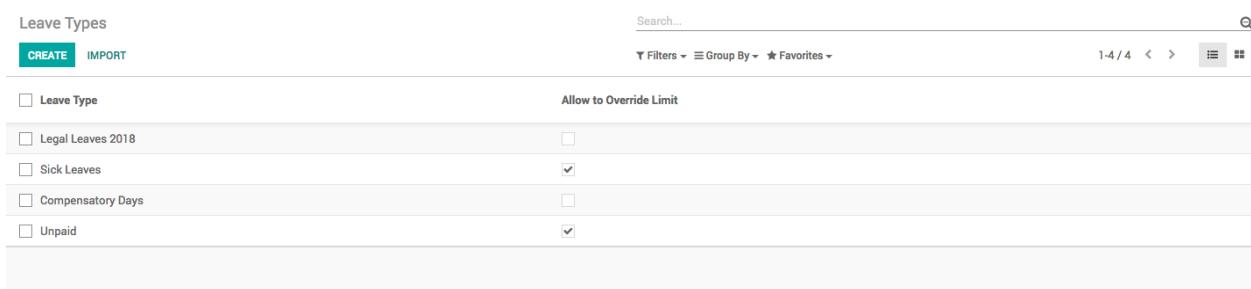


Make sure that you have verified the list of assigned employee on each tags, fix it before you proceed for the leave allocation.

Leave Types

Default leave types are already given in the Odoo as a standard data, however you can create more if needed according to your business case.

The leave types can be access from *Configuration* menu under the Leaves application.



You can create a new type or change the existing according to the business rules you need. You can change the below fields to adapt your business rules on leave type.

Apply Double Validation: Check this field when you want that the approval of the leave will be done by Department Manager and HR Manager.

Allow to Override Limit: The number of leave are always predefined, however you can allow to request for more leave than the defined/allocated, i.e. sick leaves can be requested more than assigned.

Meeting Type: Once a leave is validated, Odoo will create a meeting of this type on the correspondent calendar.

Color in Report: This color will be used to To display the specific types of leave in with color in PDF report.

Description	Sick Leaves	Options	
Leave Type	Sick Leaves	Meeting Type	Employee Leaves
Apply Double Validation	<input type="checkbox"/>	Color in Report	Red
Allow to Override Limit	<input checked="" type="checkbox"/>		

As a business case **Sick Leaves** may extend. So, check **Allow to Override Limit** field on the view.

Leave Allocation

Leaves can allocated by HR Manager or Officer or Department Manager at anytime to employees. The yearly leave allocation will be done by HR Officer or Manager in the beginning of every year while Department Manager can allocate the Compensatory leaves. Let's create the yearly leave allocation.

To assign the leave goto *My Leaves → Allocation Request* under the **Leaves** application and click on CREATE button.

APPRAVE	REFUSE	TO SUBMIT	TO APPROVE	APPROVED																
<table border="1"> <tr> <td>Description</td> <td>Leave Type</td> <td>Mode</td> <td>Department</td> </tr> <tr> <td>Sick Leaves</td> <td>Sick Leaves</td> <td>By Employee</td> <td>Sales</td> </tr> <tr> <td>Duration</td> <td>0.00 days</td> <td>Employee</td> <td>Employee</td> </tr> <tr> <td colspan="2">Add a reason...</td> <td colspan="2"></td> </tr> </table>					Description	Leave Type	Mode	Department	Sick Leaves	Sick Leaves	By Employee	Sales	Duration	0.00 days	Employee	Employee	Add a reason...			
Description	Leave Type	Mode	Department																	
Sick Leaves	Sick Leaves	By Employee	Sales																	
Duration	0.00 days	Employee	Employee																	
Add a reason...																				

By default you can assign the leaves to selected employees, employees can also create the allocation request to ask for the compensatory leave, which will be reviewed and approved by Manager or HR Office later.

Leave by Employee Tags

It is advisable to allocate all the yearly leaves to the employees by their tags, it will save lots of time to create many records, each for an individual employee.

Allocation Request / Allocation of Legal Leaves 2018 : 12.00 day(s) To Employee

CONFIRM

1 / 1 < >

TO SUBMIT TO APPROVE APPROVED

**Allocation of Legal Leaves 2018 : 12.00 day(s)
To Employee**

Description	12 legal leaves to all employees	Mode	By Employee Tag
Leave Type	Legal Leaves 2018	Employee Tag	Fulltime
Duration	12.00 days		
Add a reason...			

Select the Leave Type and enter the Duration (duration is always in days). Change the Mode from By Employees to By Employee Tags and select the specific tag in Employee Tag field, it is group of employees to whom we are going to assign the 12 legal leaves.

By default the leave allocation will be in draft, it has to be requested for the approval, click on CONFIRM button to ask for the approval, HR Manager have the rights to approve the allocation request.

As soon as the allocation request approved, Odoo will create an individual leave allocation request for each employee who belongs to selected tag.

Allocation Request							
CREATE		IMPORT		Search...			
				Filters		Group By	
Employee	Allocation Mode	Employee Tag	Leave Type	Description	Allocated Days	Start Date	End Date
<input type="checkbox"/> Employee	By Employee		Legal Leaves 2018	12 legal leaves to all employees	12.00		Approved
<input type="checkbox"/> Administrator	By Employee		Legal Leaves 2018	12 legal leaves to all employees	12.00		Approved
<input type="checkbox"/>	By Employee Tag	Fulltime	Legal Leaves 2018	12 legal leaves to all employees	12.00		Approved

36.00

Compensatory Leaves

Employee can create a leave request manually, enter the appropriate **Description**, **Duration** and select the type *Compensatory Days* in the **Leave Type** field.

Allocation Request / Allocation of Compensatory Days : 1.00 day(s) To Employee

SAVE **DISCARD**

2 / 2 < >

RESET TO DRAFT

TO SUBMIT **TO APPROVE** **APPROVED**

Allocation of Compensatory Days : 1.00 day(s) To Employee

Description Worked on weekend to fix problem 3rd February 2018
 Leave Type Compensatory Days
 Duration 1.00 days

Work for a full day at the client location to fix the problem on the server.

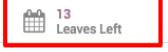
As an employee you have already applied, you have to wait for the approval for your department manager or hr manager.

Leave Summary

As soon as the yearly leave allocated, it is advisable for all the employees to check their leave summary for the allocated leaves. Leave summary for an individual employees can be checked from Leaves application, the first screen will be leave summary.

Leaves Summary						
		Filters			Search...	
CREATE IMPORT						
Employee	Request Type	Description	Number of Days	Start Date	End Date	Leave Type
▼ Legal Leaves 2018 (1)			12.00			Status
□ Employee	Allocation Request	12 legal leaves to all employees	12.00			Legal Leaves 2018 Approved
▼ Sick Leaves (1)			6.00			Sick Leaves Approved
□ Employee	Allocation Request	6 Sick Leaves	6.00			
▼ Compensatory Days (1)			1.00			Compensatory Days To Approve
□ Employee	Allocation Request	Worked on weekend to fix problem 3rd February 2018	1.00			
19.00						

Employee can see their leaves it can be allocated or requested, whether their status approved or rejected. The actual leaves available to the employees will be displayed on the employees form.

Employee <small>Fulltime</small>	 13 Leaves Left	 Active
		

11.2 Employee Expense

11.2.1 Manage advance payment, employee expenses and reconciliation

Video

Access the video at <https://www.youtube.com/watch?v=t7PS7EOiPLM>

CHAPTER 12

Website and eCommerce

12.1 Website

12.1.1 How to generate leads or opportunities through website contact us page?

Video

Access the video at <https://www.youtube.com/watch?v=Q4FujRKnUHM>

12.2 Products

12.2.1 How to configure product variants that looks perfect on eCommerce page?

Video

Access the video at <https://www.youtube.com/watch?v=6UkRfAu4xvE>

12.2.2 Ordering products, variant attribute and values on the products page

Video

Access the video at <https://www.youtube.com/watch?v=0-QgV9HDU6M>

12.3 Delivery Cost

12.3.1 Allow your customer to choose Normal or Express delivery at checkout

Video

Access the video at <https://www.youtube.com/watch?v=4mqUBAuqO18>

12.3.2 Show delivery methods depending on the customer address

Video

Access the video at <https://www.youtube.com/watch?v=NlxgevrT9O4>

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