



USER MANUAL

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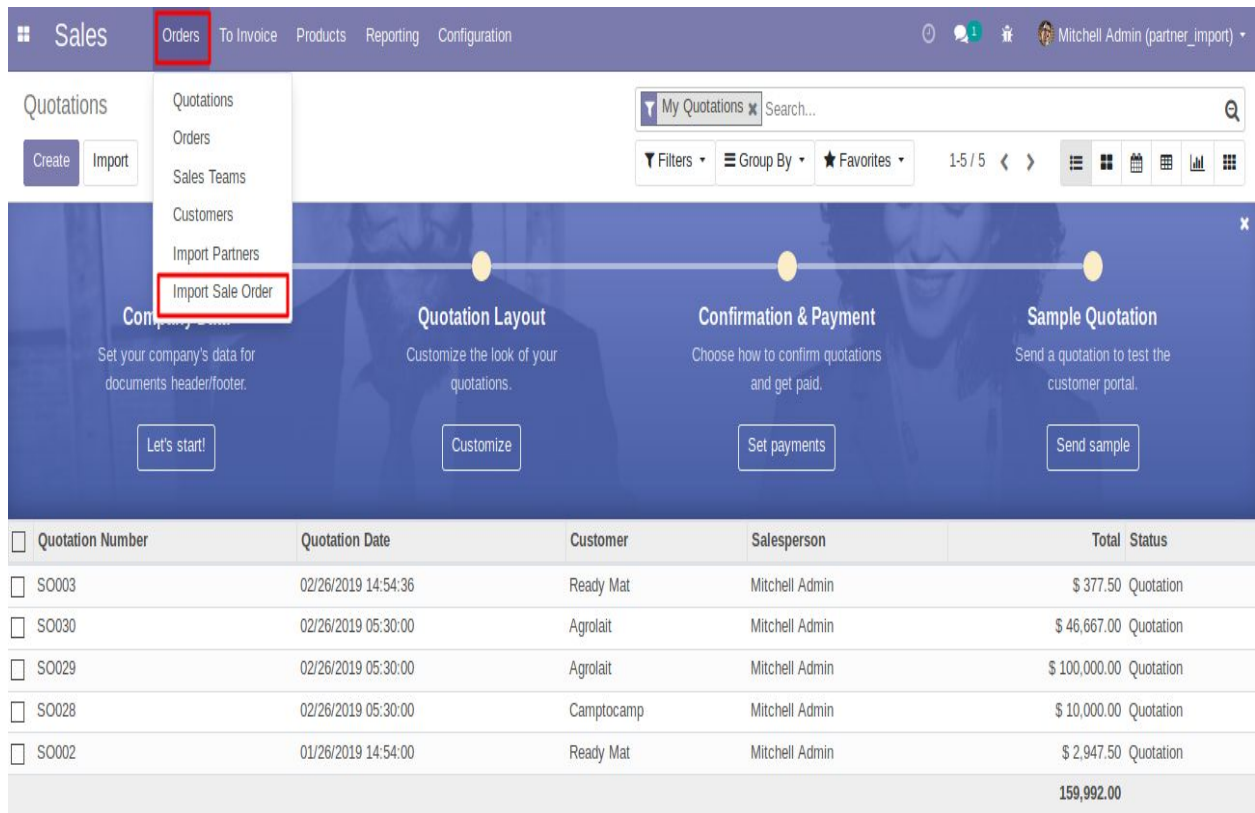
Import Sale Order Data

At Pragmatic, we have developed an app where you can import all the sale order data into Odoo very easily.

The app supports both file formats i.e. Excel and CSV. So you can import your excel file or csv file directly into Odoo.

For importing sale orders,

1. Go to Sales app-> Orders->Import Sale Order



The screenshot displays the Odoo Sales application interface. The top navigation bar includes 'Sales', 'Orders' (highlighted with a red box), 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The user is logged in as 'Mitchell Admin (partner_import)'. On the left, the 'Quotations' sidebar has 'Create' and 'Import' buttons. The 'Orders' menu is open, showing options like 'Quotations', 'Orders', 'Sales Teams', 'Customers', 'Import Partners', and 'Import Sale Order' (highlighted with a red box). The main content area features a search bar 'My Quotations' and a list of filters. Below this is a banner with four sections: 'Company Setup', 'Quotation Layout', 'Confirmation & Payment', and 'Sample Quotation'. At the bottom, a table lists quotations with columns for Quotation Number, Quotation Date, Customer, Salesperson, Total, and Status.

<input type="checkbox"/>	Quotation Number	Quotation Date	Customer	Salesperson	Total	Status
<input type="checkbox"/>	SO003	02/26/2019 14:54:36	Ready Mat	Mitchell Admin	\$ 377.50	Quotation
<input type="checkbox"/>	SO030	02/26/2019 05:30:00	Agrolait	Mitchell Admin	\$ 46,667.00	Quotation
<input type="checkbox"/>	SO029	02/26/2019 05:30:00	Agrolait	Mitchell Admin	\$ 100,000.00	Quotation
<input type="checkbox"/>	SO028	02/26/2019 05:30:00	Camptocamp	Mitchell Admin	\$ 10,000.00	Quotation
<input type="checkbox"/>	SO002	01/26/2019 14:54:00	Ready Mat	Mitchell Admin	\$ 2,947.50	Quotation
					159,992.00	

Import Sale Order

File Type

- ☒ CSV File
- ☐ XLS File

Quotation State Available

- ☒ Import Quotation in Draft Stage
- ☐ Confirm Quotation Automatically while Importing

Upload File

Upload your file

Sequence Available

Use Excel/CSV Sequence Number

Import

In CSV/Excel file you can insert following data fields:-

- [illegible]

3. Quotation State available:-

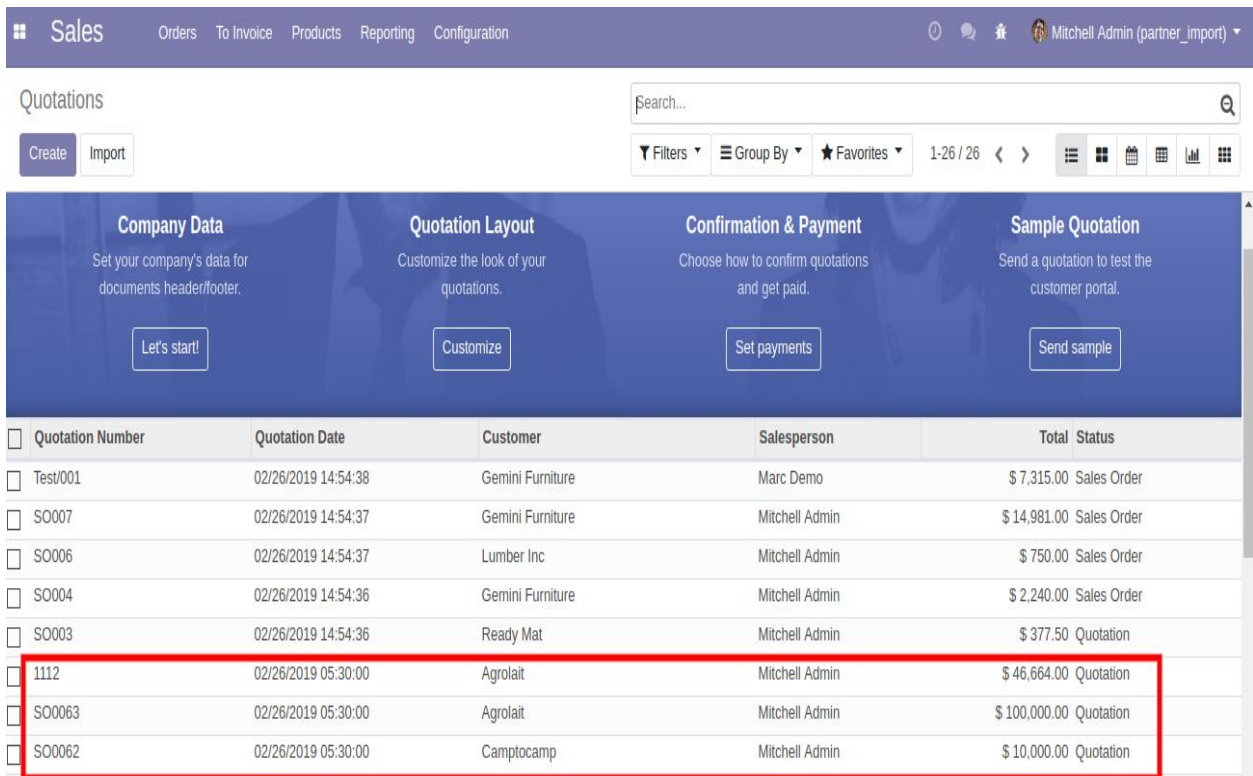
- Import Quotation in Draft Stage
- If you want to automatically confirm the quotation after importing then please select this option.

4. Then Upload required file just by clicking on Upload file button.

5. Sequence Available :-

- You can use the sequence number available in Excel/CSV file
- Or you can use the odoo default sequence numbers.

After uploading the file you can see the sale order details have been imported to odoo as follows.



The screenshot displays the Odoo Sales Quotations interface. At the top, there's a navigation bar with 'Sales' and various menu items. Below it, a search bar and filters are visible. The main section features four cards: 'Company Data', 'Quotation Layout', 'Confirmation & Payment', and 'Sample Quotation'. Below these cards is a table of quotations. The table has columns for Quotation Number, Quotation Date, Customer, Salesperson, Total, and Status. A red box highlights the last three rows of the table, which are the newly imported quotations.

Quotation Number	Quotation Date	Customer	Salesperson	Total	Status
Test/001	02/26/2019 14:54:38	Gemini Furniture	Marc Demo	\$ 7,315.00	Sales Order
SO007	02/26/2019 14:54:37	Gemini Furniture	Mitchell Admin	\$ 14,981.00	Sales Order
SO006	02/26/2019 14:54:37	Lumber Inc	Mitchell Admin	\$ 750.00	Sales Order
SO004	02/26/2019 14:54:36	Gemini Furniture	Mitchell Admin	\$ 2,240.00	Sales Order
SO003	02/26/2019 14:54:36	Ready Mat	Mitchell Admin	\$ 377.50	Quotation
1112	02/26/2019 05:30:00	Agrolait	Mitchell Admin	\$ 46,664.00	Quotation
SO0063	02/26/2019 05:30:00	Agrolait	Mitchell Admin	\$ 100,000.00	Quotation
SO0062	02/26/2019 05:30:00	Camptocamp	Mitchell Admin	\$ 10,000.00	Quotation

It is very simple to use and operations are fast paced.