

User Guide

Odoo 18.0

Core features

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CHAPTER 1

About IROKOO

1.1 Odoo 18 documentation: manual and exercise book

IROKOO offers a complete training set made of two complementary documents:

- **The reference manual.** This main document holds every theoretical and functional explanation of Odoo 18, organised by module. It serves both as course material and as reference documentation.
- **The practical exercise book.** This companion document puts the concepts into practice through a fictional company (MécaPrécis Industries). It follows the implementation of Odoo step by step in a realistic setting.

Note

The two documents are meant to be used side by side: read the manual to understand the concepts, then apply them by working through the matching exercises.

Tip

To get the most out of this training, we recommend that you:

- read the theory chapter in the manual first;
- then carry out the matching practical exercises;
- come back to the manual to go deeper on a point when needed.

1.2 The alliance of experts that drives your growth with Odoo

IROKOO has been an Odoo Gold partner since 2022, specialising in the implementation and the optimisation of Odoo solutions for businesses. Our mission is to secure your projects on a solid in-house foundation and to speed up your success through our extended ecosystem. Born of experience pooled from several fields (organisational, functional, technical, industrial, accounting and management), IROKOO supports you effectively in your digital work with Odoo.

Note

As an Odoo Gold partner, IROKOO guarantees a level of expertise recognised and validated by the publisher, and with it the quality of our implementations.

1.3 Our services

IROKOO offers a full range of services to secure the success of your Odoo project:

1. **Odoo implementation**: a tailored setup matched to your needs.
2. **Training**: bespoke sessions for users at every level.
3. **Technical support**: continuous support and problem solving.
4. **Specific development**: extensions and customisations answering your own needs.
5. **Process optimisation**: analysis and improvement of your workflows.
6. **Migration**: a smooth transition to the new versions of Odoo.
7. **Integration**: connecting Odoo with your existing tools and systems.
8. **AI agents**: intelligent solutions to automate and optimise your processes.

Our proven implementation method delivers projects on time, within budget and to a high standard of quality:

1. a thorough analysis of your needs and of your existing processes;
2. the design of a solution aligned with your strategic objectives;

3. configuration and customisation matched to your industry;
4. full training of your teams for successful adoption;
5. continuous support after go-live, to maximise your return on investment.

1.4 Our Odoo expertise

With more than 10 years of experience in Odoo implementation and more than 20 years in ERP integration, our team of 34 experts brings you:

- a thorough understanding of Odoo best practice;
- real functional experience in business, for a hands-on approach;
- a strategic view for optimising your business processes;
- technical mastery for bespoke development and integration;
- a knowledge of sector specifics, to fit your field of activity.

Our experience in figures

- more than 120 Odoo projects successfully implemented;
- more than 150 ERP projects in the overall experience of our contributors;
- more than 10 years of experience in Odoo implementation;
- 34 experts devoted to your projects;
- a national presence: Paris, Tours, Montpellier, Avignon, Blois, Le Mans, Nantes, Strasbourg, Lyon.

1.5 Why choose IROKOO

Choosing IROKOO as the partner for your Odoo project gives you:

1. **Technical excellence**: a certified team whose skills are validated by Odoo.
2. **A pragmatic approach**: realistic solutions matched to your context.
3. **A long-term view**: support that goes beyond the initial implementation.
4. **A commitment to results**: satisfaction measured against concrete objectives.
5. **Skills transfer**: an emphasis on the autonomy of your teams.

Tip

IROKOO favours a collaborative approach that involves your teams throughout the project, which secures better adoption of the solution and an effective transfer of skills.

1.6 Contacting us

To start your Odoo project or to find out more about our services:

- Website: www.irokoo.fr
- Email: info@irokoo.fr
- Phone: 07 80 90 11 37

Book a personalised demonstration or an assessment of your needs by visiting our website.

CHAPTER 2

Introduction

2.1 About this guide

Tip

This user guide for Odoo 18 is designed to support you both in getting started and in the daily use of your Odoo system. It covers the core features and the essential processes you will meet every day. The document is structured so that it can be read right through, for thorough training, or consulted on a particular point as the need arises.

2.2 What is Odoo?

Odoo is a complete suite of business applications covering the whole range of an organisation's needs: sales, CRM, purchasing, inventory, accounting, manufacturing, project management, human resources, website and e-commerce. All these applications are fully integrated with one another, which gives a smooth and consistent user experience.

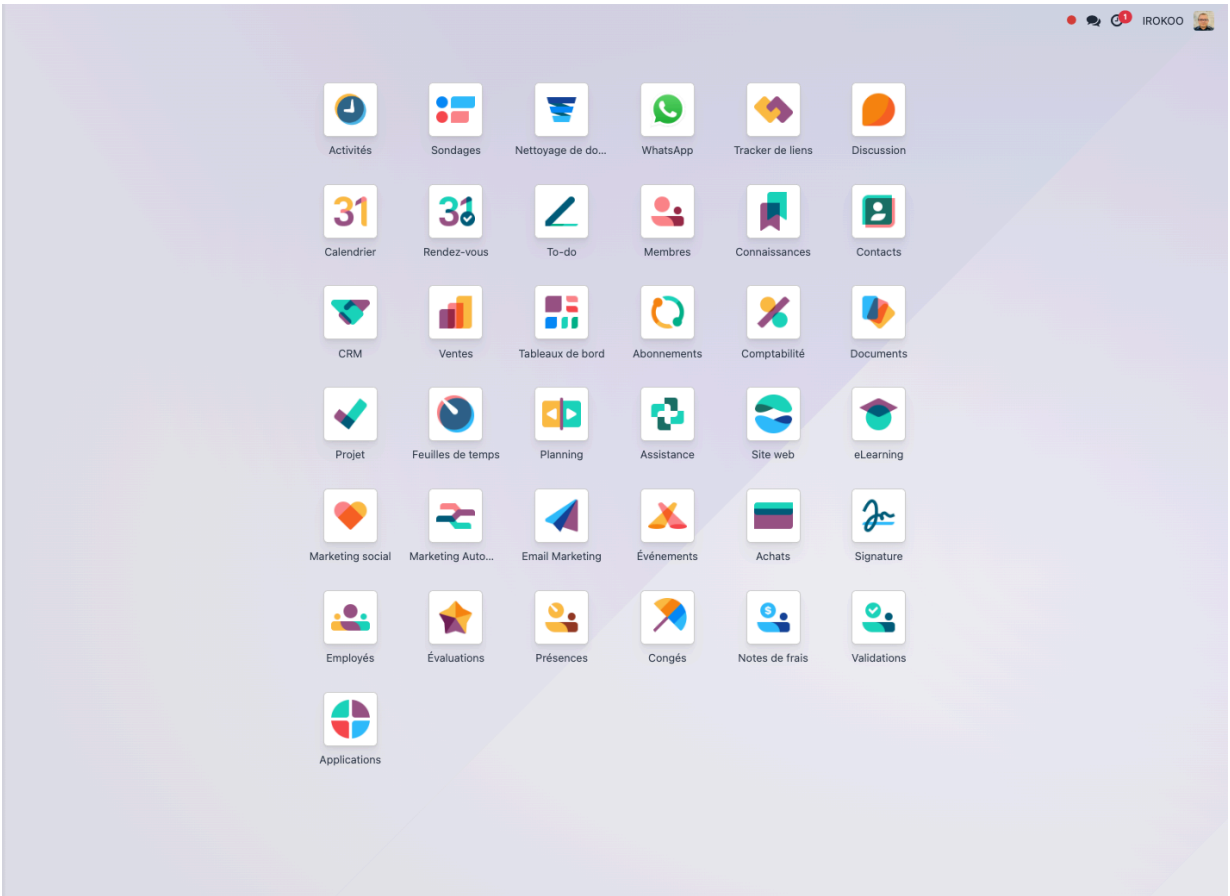


Figure 2.1: The complete ecosystem of Odoo applications

Odoo comes in two editions:

- **Odoo Community Edition**: the free open-source edition with the essential features.
- **Odoo Enterprise Edition**: the full edition, which adds advanced features, official support and guaranteed updates.

2.3 The founding principles of Odoo

2.3.1 A modular approach

Odoo works on a modular principle: you choose the applications you need and can add others as your business develops. Every application shares the same database, which keeps information consistent across the system.

Tip

In Odoo 18, installing applications is faster still thanks to optimised dependency handling, which shortens deployment time considerably.

2.3.2 Hosting options

Odoo offers several hosting arrangements to answer the needs of different businesses:

1. **Odoo Online (SaaS)**: hosted in the cloud by Odoo.
   - immediate go-live;
   - automatic updates;
   - maintenance handled by Odoo;
   - a monthly or yearly subscription including the hosting;
   - ideal for small and medium-sized businesses wanting a quick start with no technical infrastructure.
2. **Odoo On-Premise**: hosted on your own servers or infrastructure.
   - full control of the environment;
   - advanced customisation of the code;
   - direct integration with your internal systems;
   - updates handled on your own schedule;
   - suited to businesses with specific requirements or regulatory constraints.
3. **Odoo.sh**: a platform-as-a-service for Odoo.
   - development, test and production environments;
   - Git integration for versioning the code;
   - automated deployment;
   - easy handling of branches and versions;
   - a hybrid solution, ideal for projects that need specific development.

Note

The choice of hosting depends on your customisation needs, on your internal technical resources and on your security or data confidentiality constraints.

2.3.3 Client-server and responsive architecture

Odoo 18 rests on a modern architecture:

- a responsive web interface suited to every device (desktop, tablet, smartphone);
- dedicated mobile applications for iOS and Android;
- a full REST API for integration with other systems;
- an OWL (Odoo Web Library) component architecture for a responsive user interface.

2.3.4 Integrated workflows

The Odoo applications are built to work together seamlessly. For example:

- a confirmed quotation can create a delivery order automatically;
- receiving products can generate a vendor bill;
- a paid invoice updates your accounting automatically;
- a service contract generates recurring invoices automatically.

Note

This native integration avoids double entry and considerably reduces the risk of error, while giving full traceability of the transactions.

2.3.5 Customisation and flexibility

Odoo 18 offers several levels of customisation to fit your own processes:

- straightforward configuration through the standard user interface;
- Odoo Studio (Enterprise) for no-code customisation of forms, views and fields;
- advanced automation rules with conditional triggers;
- creation of custom reports and dashboards;
- development of bespoke modules, for very specific needs.

2.3.6 Collaboration and communication tools

Collaboration is at the heart of Odoo 18:

- messaging built into every document (the chatter);
- handling of activities and reminders;
- real-time discussions and topic channels;
- document sharing with fine-grained access control;
- shared calendars and synchronisation with outside tools.

2.3.7 Compliance and localisation

Odoo 18 is built to meet legal and tax requirements in many countries:

- charts of accounts preconfigured by country;
- automated tax handling (VAT and others);
- electronic invoices compliant with local regulations;
- export formats compatible with official filings;
- regular updates to keep legal compliance.

2.4 How to use this guide

2.4.1 Structure of the document

This guide is organised into chapters covering the various features of Odoo 18:

1. **First steps with Odoo**: a quick start and the essential actions.
2. **The interface**: to get familiar with the Odoo environment.
3. **Contact management**: creating and handling customers, vendors and prospects.
4. **Product management**: configuring products, services and variants.
5. **Sales management**: from quotation to invoice.
6. **CRM**: customer relationship management.
7. **Purchase management**: from requests for quotation to vendor payment.
8. **Inventory management**: receipts, deliveries and stocktaking.
9. **Accounting and finance**: invoicing, payments and financial reports.
10. **Manufacturing**: production and manufacturing orders.
11. **Project management**: organising tasks and tracking time.
12. **Analysis and reporting**: dashboards and decision-support tools.
13. **Workflows and automation**: automation rules.

Tip

Each chapter can be consulted on its own, but we recommend reading at least the “First steps” and “The interface” chapters before tackling the business modules.

2.4.2 Ways of reading

This guide is designed to suit different kinds of user and different learning styles:

1. **Beginner**: if you are new to Odoo, start with the “First steps” chapter and work through the chapters in order, for a gradual understanding.
2. **User in a hurry**: if you have a particular task to carry out, go straight to the matching chapter. To draw up a quotation, for instance, go directly to “Sales management”.
3. **Administrator**: if you are an administrator or a developer, you can work through the chapters in order or consult them independently as the need arises.
4. **Trainer**: if you are a trainer, you can use this guide as material for your sessions. The chapters can be followed in order or selected according to the training programme.

2.4.3 Conventions used

To make reading easier, this guide uses the following conventions:

– **Bold text**: interface elements (menus, buttons, fields).
– *Italic text*: important concepts or specific terms.
– Underlined text: references to other sections of the document.
– Fixed-width text: code or technical commands.

Step-by-step procedures are presented as numbered lists, and coloured boxes highlight the points that deserve attention.

Relation with the exercise book

This theoretical guide comes with a practical exercise book which lets you apply the concepts presented through a concrete implementation case for a manufacturing company. Each main section of this guide refers to the matching step in the exercise book.

2.4.4 Further resources

For a deeper understanding and for complementary material, you can consult:

– **Online documentation**: www.odoo.com/documentation/18.0
– **Tutorial videos**: www.odoo.com/slides
– **IROKOO training**: www.irokoo.fr/formations-odoo

CHAPTER 3

Initial setup

Relation with the exercise book

This chapter matches Step 1 of the exercise book: **creating and configuring the company**.

3.1 Company settings

To configure the basic information of your business:

1. Open **Settings → Users & Companies → Companies**.
2. Select your company.
3. Complete the information: name, logo, address, contact details.
4. Fill in the tax data (VAT number and the like).
5. Save the changes.

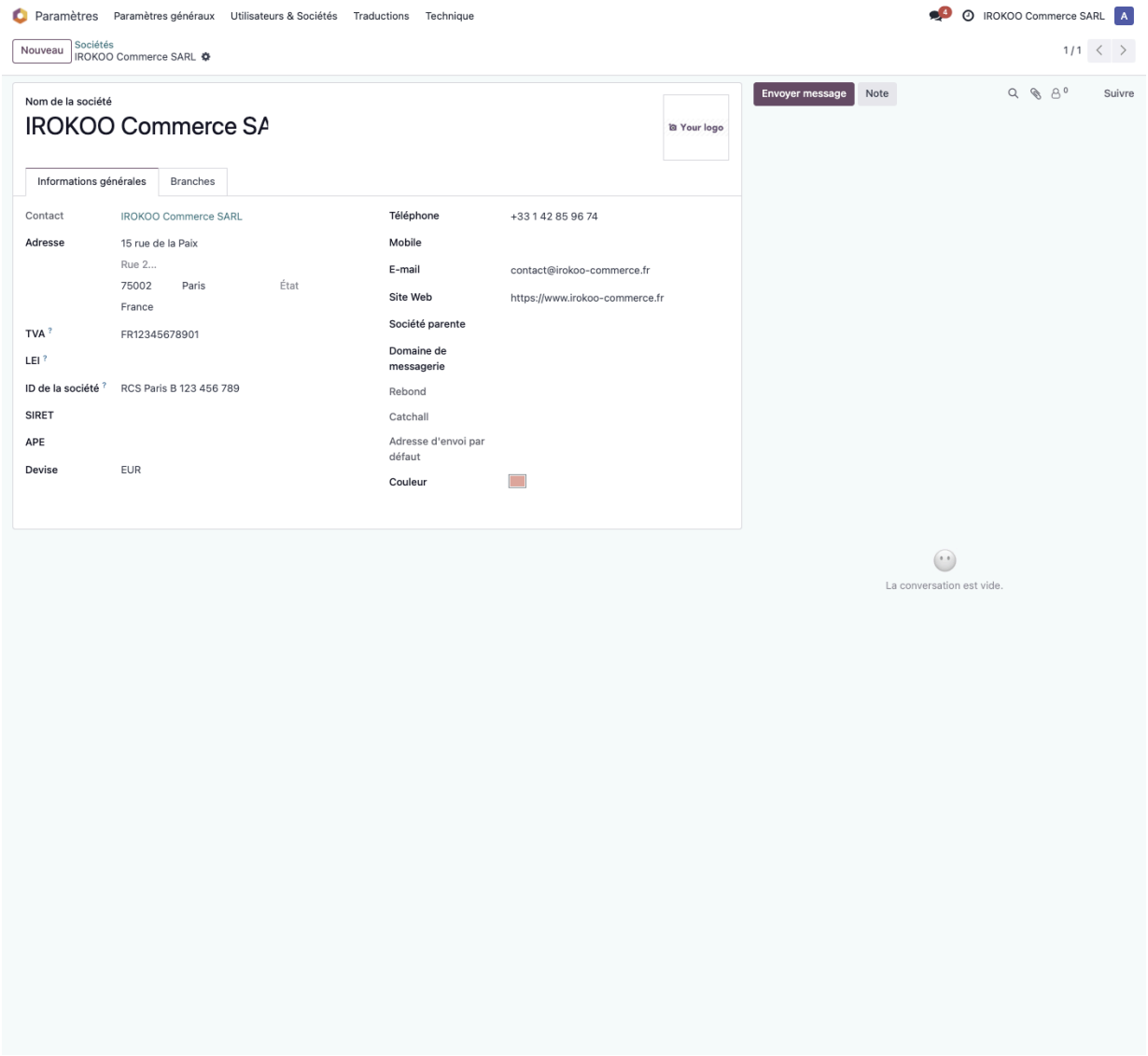


Figure 3.1: The company configuration screen

Tip

> Configuring your company information correctly is essential, because that data appears on all your official documents (quotations, invoices and so on).

3.2 Managing users

3.2.1 Creating users

To add new users to your system:

1. Open **Settings → Users & Companies → Users**.
2. Click **New** for a new user.
3. Fill in the essential information:
   - first name and surname;
   - business email address, which will serve as the login;
   - company, in a multi-company environment;
   - language and timezone.
4. Set the appropriate access rights.
5. Send an invitation by email.

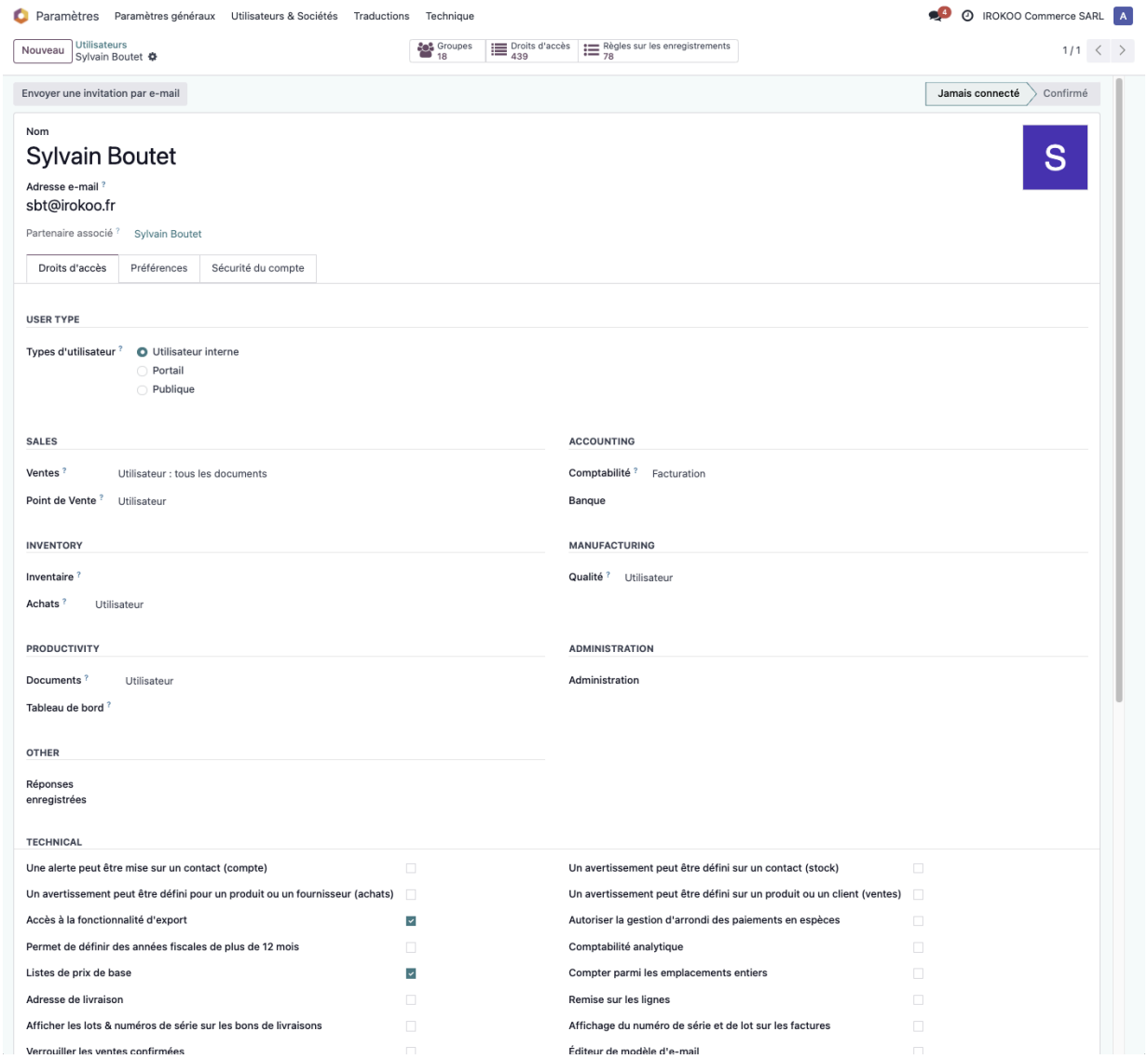


Figure 3.2: The user management screen

3.2.2 Security groups

Odoo handles access rights through a system of security groups:

- each group gives access to specific features;
- a user can belong to several groups;
- groups are organised by application;
- some groups are hierarchical: an administrator group includes the rights of the groups below it.

Note

Always grant each user the minimum rights they need, following the principle of least privilege. You can easily extend those rights later if the need arises.

3.3 Installing applications

To install the applications you need:

1. Open **Apps** from the main menu.
2. Use the search bar to find the applications you want.
3. Click the **Install** button for each application required.
4. Wait for the installation to finish: dependencies are installed automatically.
5. Reach the new applications from the main menu.

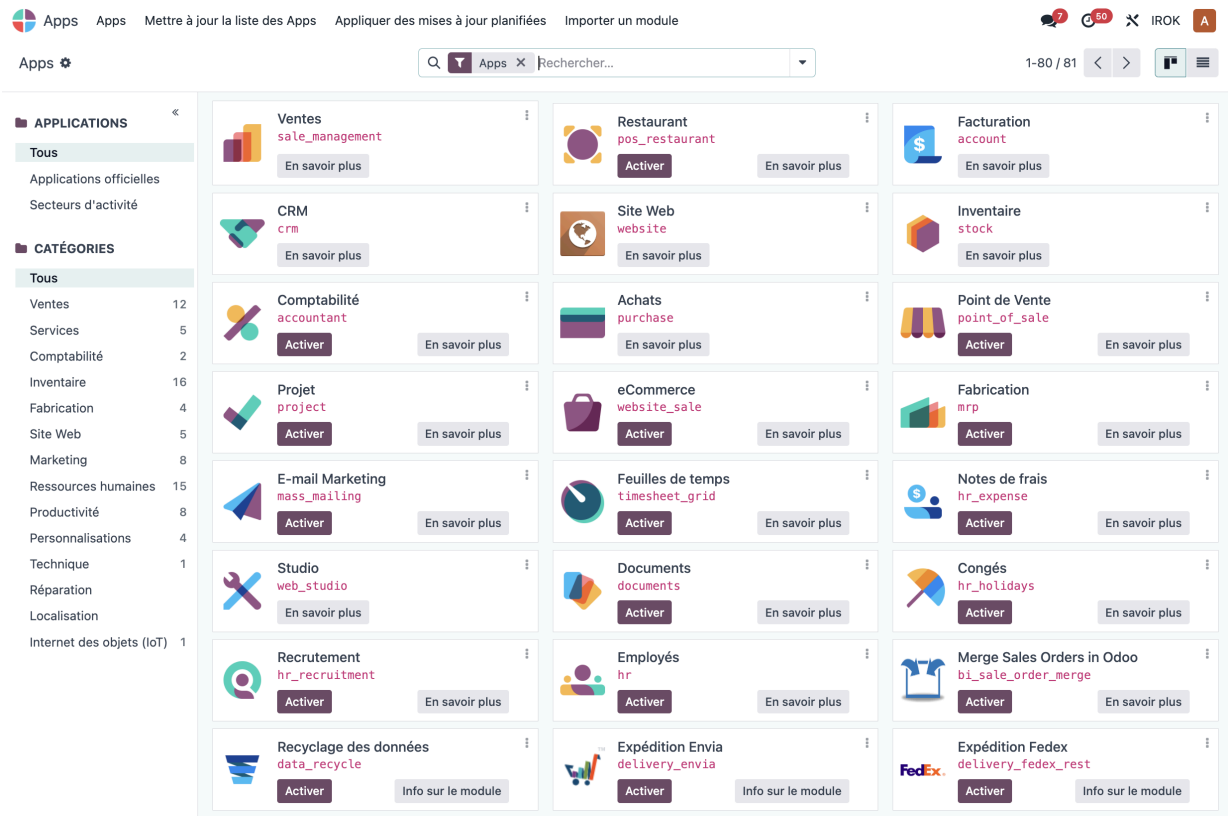


Figure 3.3: The application installation screen

3.4 General company settings

3.4.1 Configuring the general preferences

To set the global parameters of the system:

1. Open **Settings → General Settings**.
2. Configure the options to suit your needs.
3. Click **Save** to apply the changes.

3.4.2 Multi-company settings

If you handle several legal entities:

1. First create the various companies as described above.
2. Open **Settings → Users & Companies → Users**.
3. For each user, configure:
   - the company or companies the user has access to;
   - the default company at start-up.

Tip

In a multi-company environment, the user can switch between companies through the selector in the user menu, at the top right of the screen.

3.5 Key points to check before starting

Before going on to configure the individual modules, make sure that:

- the company information is complete and correct;
- the key users are created with the appropriate access rights;
- every application needed is installed;
- the general settings match your needs;
- where applicable, the multi-company structure is correctly defined.

Note

Careful initial configuration avoids later problems and makes the system easier for your teams to adopt.

CHAPTER 4

CRM: from lead to won quotation

Relation with the exercise book

This chapter matches Step 2 of the exercise book: **setting up the CRM and handling opportunities**. It gives you the theoretical concepts you need to understand how to run your sales pipeline, from first contact through to conversion into a quotation.

4.1 Introduction to the CRM

4.1.1 What is the CRM in Odoo?

Odoo's CRM (Customer Relationship Management) module lets you:

- organise your sales activity;
- follow leads and convert opportunities;
- run your sales pipeline;
- plan and follow your sales activities;
- analyse the performance of your teams;
- obtain accurate sales forecasts.

Note

Odoo's CRM is fully integrated with the other modules, notably contacts, sales and marketing, which gives a 360-degree view of your customers.

4.2 Configuring the CRM

4.2.1 General settings

To configure the CRM to suit your needs:

1. Open **CRM → Configuration → Settings**.
2. Enable the relevant features:
   - **Leads**, for handling unqualified prospects;
   - **Multi Teams**, if you have several sales teams;
   - **Predictive Lead Scoring**, to score your prospects automatically;
   - **Lead Enrichment**, to complete the information automatically.
3. Save the settings.

4.2.2 The sales pipeline

The pipeline represents the stages of the sales process. Each stage matches a key moment of your sales cycle.

1. Open **CRM → Configuration → Pipeline → Stages**.
2. Define the stages that suit your sales cycle:
   - **New**: first contact with the prospect;
   - **Qualified**: qualified prospect with an identified need;
   - **Proposition**: quotation or proposal sent;
   - **Negotiation**: discussion of the terms;
   - **Won**: opportunity secured.
3. For each stage, configure:
   - **Stage Name**: the label that will appear in the pipeline;
   - **Sequence**: the display order of the stages, a lower number coming earlier;
   - **Is Won Stage?**: tick this if the stage represents a successful sale;

- **Folded in Pipeline**: to hide the stage in the kanban view when it is empty;
- **Sales Team**: assignment to a specific team, optional;
- **Requirements**: a description of the criteria for reaching this stage.

Tip

Stages marked as won let Odoo compute your conversion rates and realised revenue automatically in the reports.

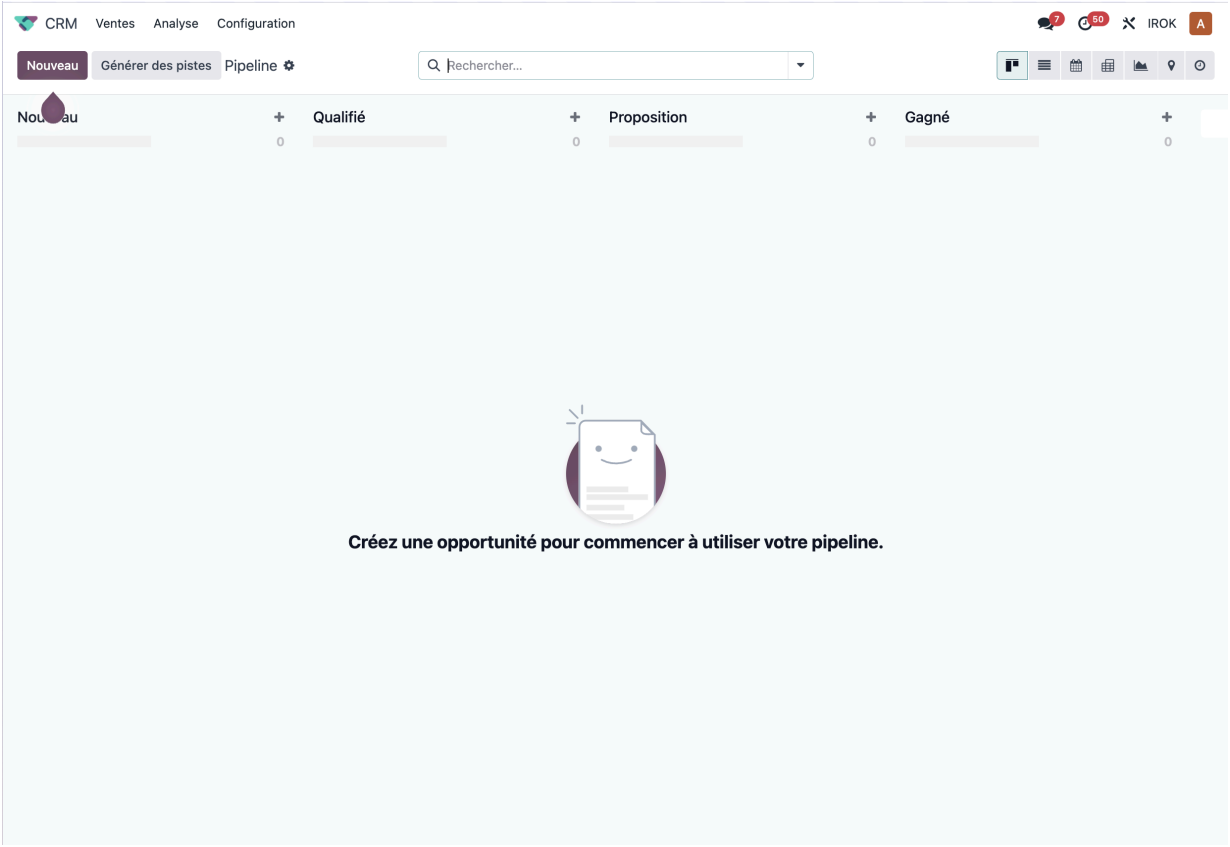


Figure 4.1: Configuring the sales pipeline in Odoo

4.3 Handling leads and opportunities

4.3.1 Creating a lead

To record a new prospect:

1. Open **CRM → Leads**.
2. Click **New**.
3. Fill in the essential information:
   - the name of the lead, that is the subject of the opportunity;
   - the contact and the company concerned;
   - the source of the lead: website, trade show, referral and so on;
   - email and phone;
   - the sales team and the salesperson responsible;
   - tags, to classify it.
4. Save the lead.

4.3.2 Qualification and conversion

To convert a lead into an opportunity:

1. Open the lead concerned.
2. Once it is qualified, click **Qualify**.

3. Choose the appropriate action:
   - create an opportunity;
   - merge with an existing opportunity;
   - create a customer.
4. Confirm the conversion.

Tip

Conversion turns a lead (a potential contact with limited information) into a more concrete opportunity with identified business potential.

4.3.3 Handling opportunities

To follow your opportunities and move them forward:

1. Open the **CRM** module: you land directly on the kanban view.
2. By default the **My Pipeline** filter is active and displays your opportunities.
3. The opportunities are organised in columns matching the sales stages.
4. To move an opportunity forward:
   - drag the card to the next stage;
   - or open the opportunity and change the **Stage** field.
5. For each opportunity, keep up to date:
   - the expected revenue;
   - the expected closing date;
   - the planned activities;
   - the notes and the communications.
6. Use the other filters available to see:
   - **All opportunities**: the overall view of the team;
   - **My Activities**: opportunities with activities to handle;
   - custom filters, to suit your needs.

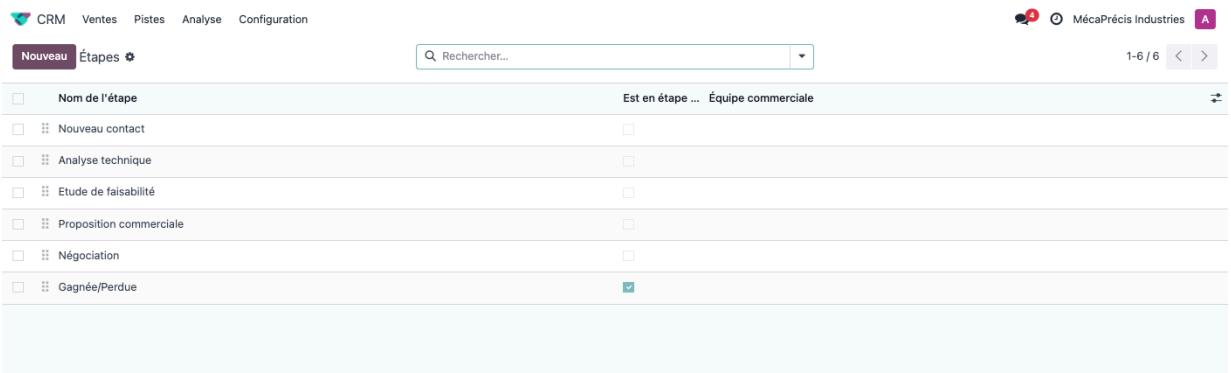


Figure 4.2: Following opportunities in the CRM pipeline

4.4 Sales activities

4.4.1 Planning activities

To organise your sales actions you have several routes.

From a single opportunity:

1. Open the opportunity concerned.
2. In the chatter, the communication area, click **Activities**.
3. Click **Schedule Activity**.
4. Select the type of activity:
   - phone call;
   - meeting;

  - email;
  - to-do.
5. Set a due date.
6. Assign the activity to a user.
7. Add a descriptive note.
8. Schedule the activity.

From the overall Activities view:

1. In the **CRM** module, click the **Activities** icon in the view switcher.
2. That view is one of Odoo's standard views, like List, Kanban or Calendar.
3. It displays the opportunities organised by type of planned activity.
4. The columns represent the different types of activity: email, call, meeting, to-do and so on.
5. To plan a new activity:
   - click **Schedule Activity** under an opportunity;
   - or use the button at the foot of the column.
6. To handle the existing activities:
   - drag an opportunity from one column to another to change the type of activity;
   - click an opportunity to see the detail and mark the activity as done;
   - use the filters to see your own activities or those of your team.

4.4.2 Following activities

The Activities view lets you see and handle all your sales activities in an organised way:

1. In the **CRM** module, select the **Activities** view, the clock icon.
2. The opportunities are organised in columns by type of activity.
3. Each column represents a specific type of activity: email, call, meeting, to-do and so on.
4. To handle an activity:
   - click the opportunity to open its detail;
   - mark the activity as done in the chatter;
   - plan the next activity if needed.
5. Use drag and drop to move an opportunity to another type of activity.
6. The "My Pipeline" filter lets you see your own activities only.

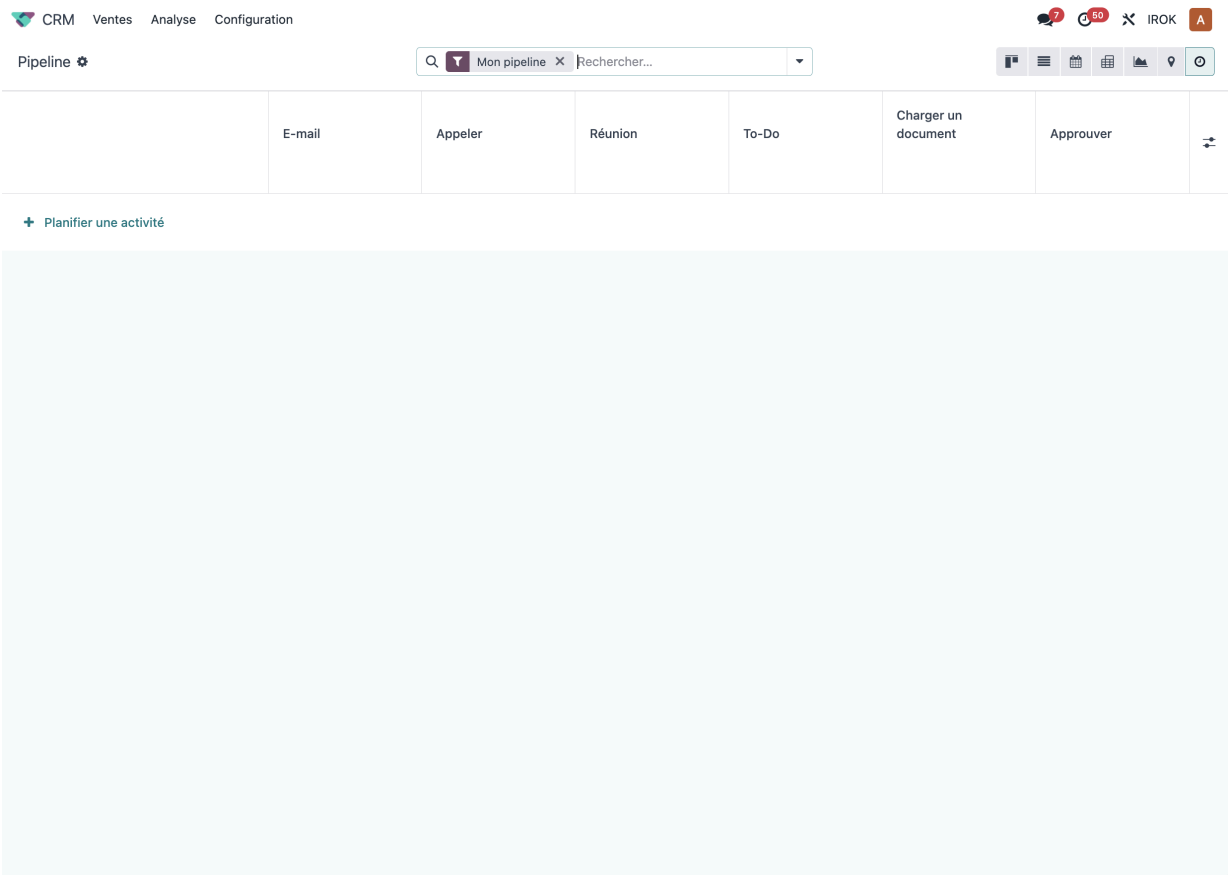


Figure 4.3: The sales activity dashboard

4.5 Analysing sales performance

4.5.1 The CRM dashboard

To analyse sales activity:

1. Open **CRM** → **Reporting** → **Pipeline**.
2. Consult the key indicators:
   - forecast revenue by period;
   - conversion rate by stage;
   - performance by salesperson or team;
   - current pipeline against targets.
3. Use the filters to refine the analysis: period, team, salesperson and so on.

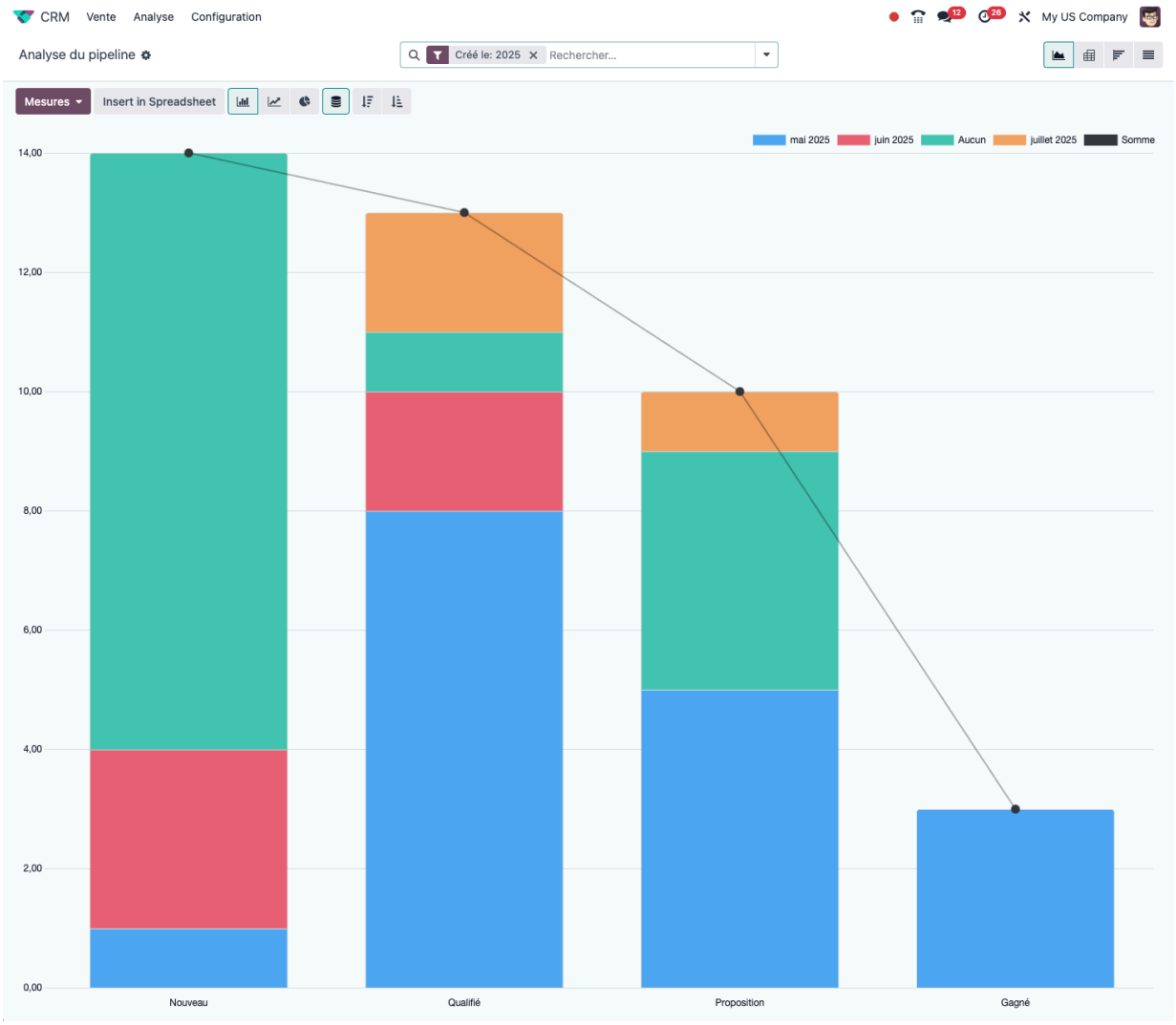


Figure 4.4: The CRM analysis dashboard

4.6 From the CRM to the sale

4.6.1 Creating a quotation from an opportunity

To turn an opportunity into an order:

1. From a qualified opportunity, click **New Quotation**.
2. The system generates a pre-filled quotation with:
   - the customer of the opportunity;
   - the salesperson responsible;
   - a reference to the source opportunity.
3. Complete the quotation with the products and the terms.
4. Send the quotation to the customer.

4.6.2 Winning an opportunity

When a customer accepts your proposal:

1. Open the opportunity concerned.
2. Click the **Mark Won** button.
3. The opportunity is marked as won in your pipeline.
4. If a quotation is linked to the opportunity, you will have to confirm it by hand to turn it into a sales order.

Tip

This integration between CRM and Sales gives full traceability of the customer journey, from first contact through to the sale being concluded.

4.7 Good practice for running the CRM effectively

Advice for getting the most out of it:

- **Qualification**: define clear criteria for qualifying your leads and opportunities.
- **Planning**: systematically schedule the next action after every interaction.
- **Reporting**: review your performance regularly to identify your strengths and where to improve.
- **Regular follow-up**: update your pipeline at least once a week.
- **Documentation**: record the history of the interactions in the notes of each opportunity.
- **Forecasting**: keep your closing dates and expected revenue up to date for reliable forecasts.

CHAPTER 5

Products and services

Relation with the exercise book

This chapter matches Step 3 of the exercise book: **creating the items and the categories**. It gives you the concepts you need to configure your products and services effectively, and to organise them into categories in Odoo.

5.1 Introduction to products in Odoo

Odoo uses the word “product” for both physical goods and services. Products sit at the heart of many business processes:

- they are sold to customers, on quotations and orders;
- they are bought from vendors;
- they are held in your inventory;
- they are manufactured in your workshop.

Note

A well-configured product makes the daily running of your business considerably easier. Take the time to structure your product catalogue properly.

5.2 Types of product

Odoo offers several types of product to suit your needs.

Main types:

- **Goods**: tangible physical products that you supply.
- **Service**: intangible work, such as consulting or maintenance.
- **Combo**: lets you build products offering several choices by category.

For physical goods, a further distinction:

- **Track Inventory** ticked: a storable product whose stock you track precisely.
- **Track Inventory** cleared: a consumable product whose stock you do not track.

Tip

In Odoo 18, the storable/consumable distinction is made through the **Track Inventory** checkbox in the Inventory tab, and not through the product type.

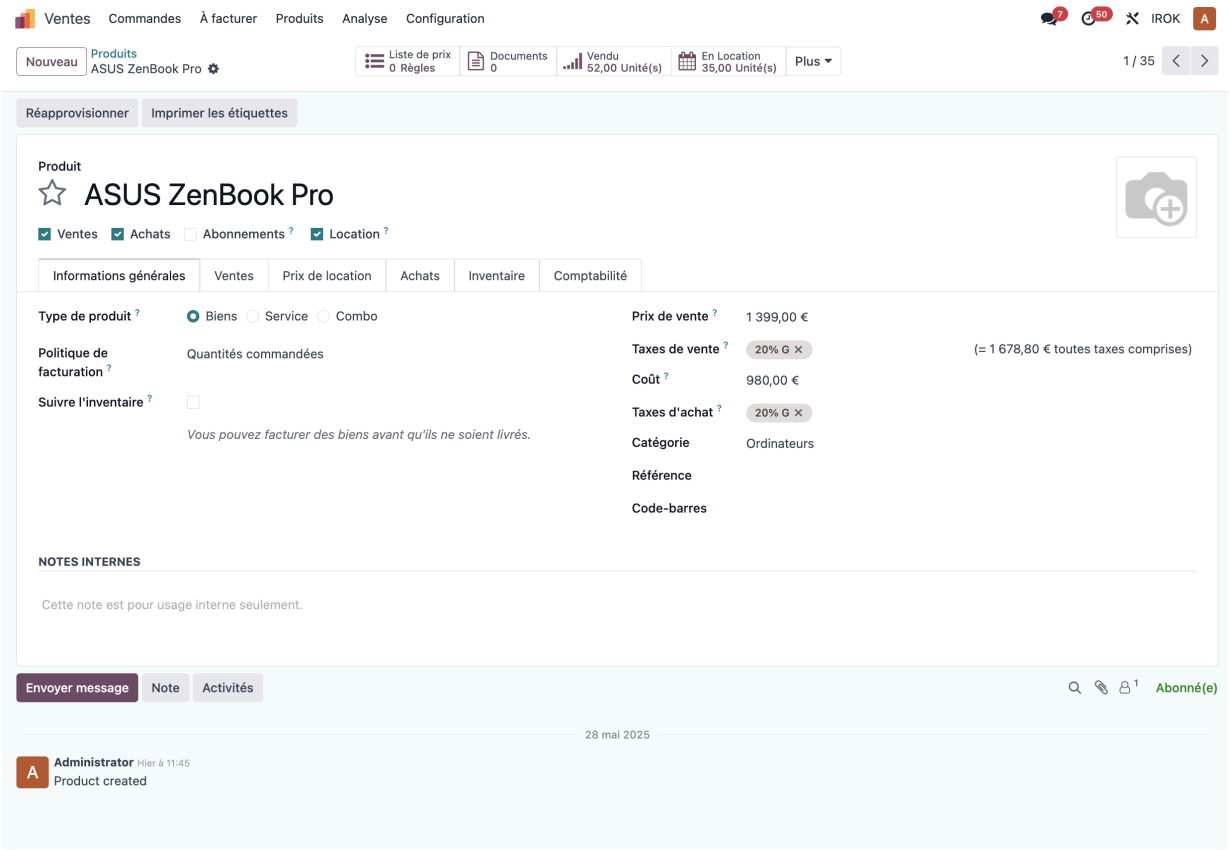


Figure 5.1: The different types of product in Odoo

5.3 Creating a new product

5.3.1 Steps for creating a product

To add a new product to your catalogue:

1. Open the **Sales**, **Purchase** or **Inventory** module.
2. Click **Products** in the left-hand menu.
3. Click the **Create** button.
4. Fill in the basic information:
   - the product name;
   - the product type: Goods, Service or Combo;
   - the sales price;
   - the purchase cost;
   - the product category.
5. Configure the additional tabs as needed.
6. Click **Save**.

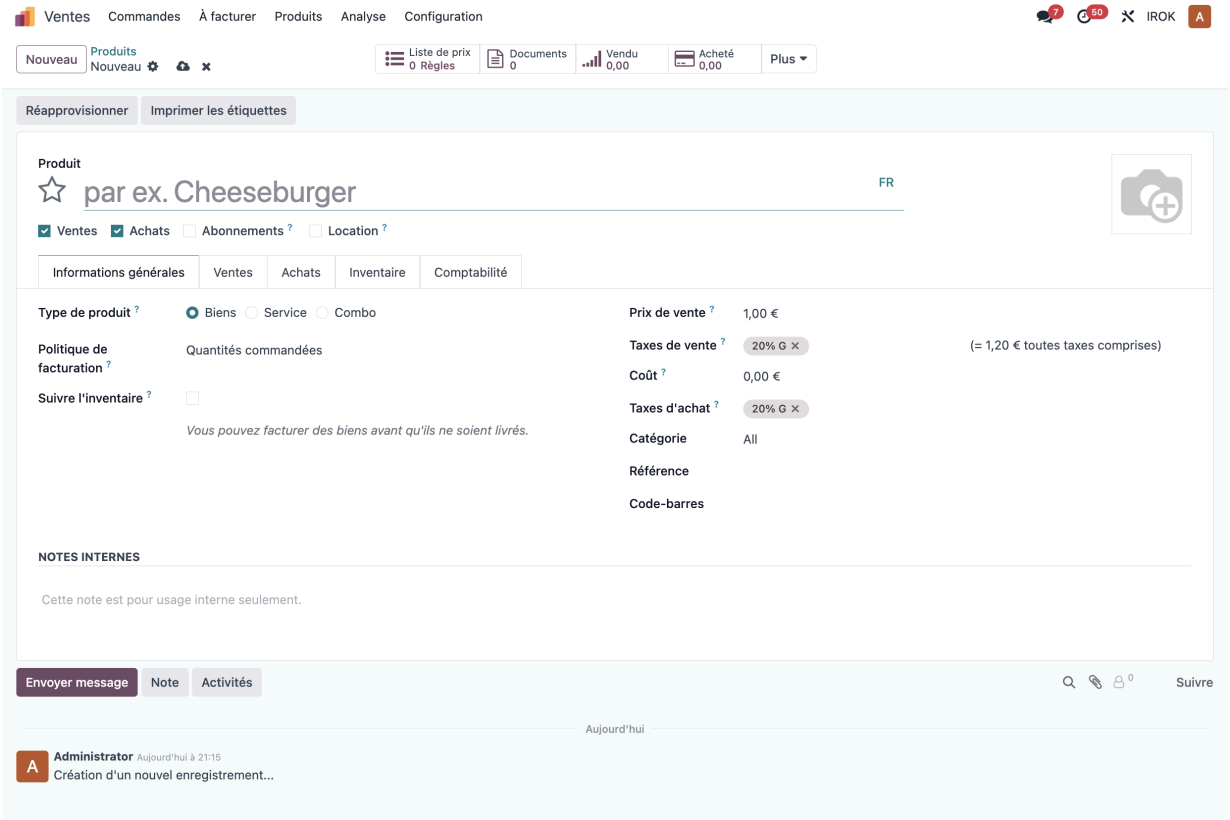


Figure 5.2: The product creation form

5.3.2 General information

The **General** tab holds the basic information of the product:

- **Internal reference**: the product's internal code.
- **Barcode**: an EAN13 or UPC-A code for scanning.
- **Vendor Reference**: the code used by your vendor.
- **Category**: a logical group for organising your products.
- **Unit of Measure**: the base unit (piece, kg, m and so on).
- **Purchase unit of measure**: if it differs from the base unit.

Tip

Well-organised product categories make navigation and analysis easier. Build a hierarchy that reflects your business.

5.3.3 Sales information

The **Sales** tab lets you configure:

- **Sales Price**: the list price of the product.
- **Customer taxes**: VAT or any other applicable tax.
- **Sales description**: the text that will appear on quotations.
- **Available on Website**: for online sales.

Sales price. You can define:

- a fixed standard price;
- pricing rules: quantity discounts, customer discounts and so on;
- specific pricelists, by region or by category of customer.

5.3.4 Purchase information

The **Purchase** tab lets you configure:

- **Vendors**: the list of vendors for this product.
- **Purchase price**: the supply cost.
- **Vendor taxes**: VAT or any other applicable tax.
- **Purchase description**: the text that will appear on purchase orders.

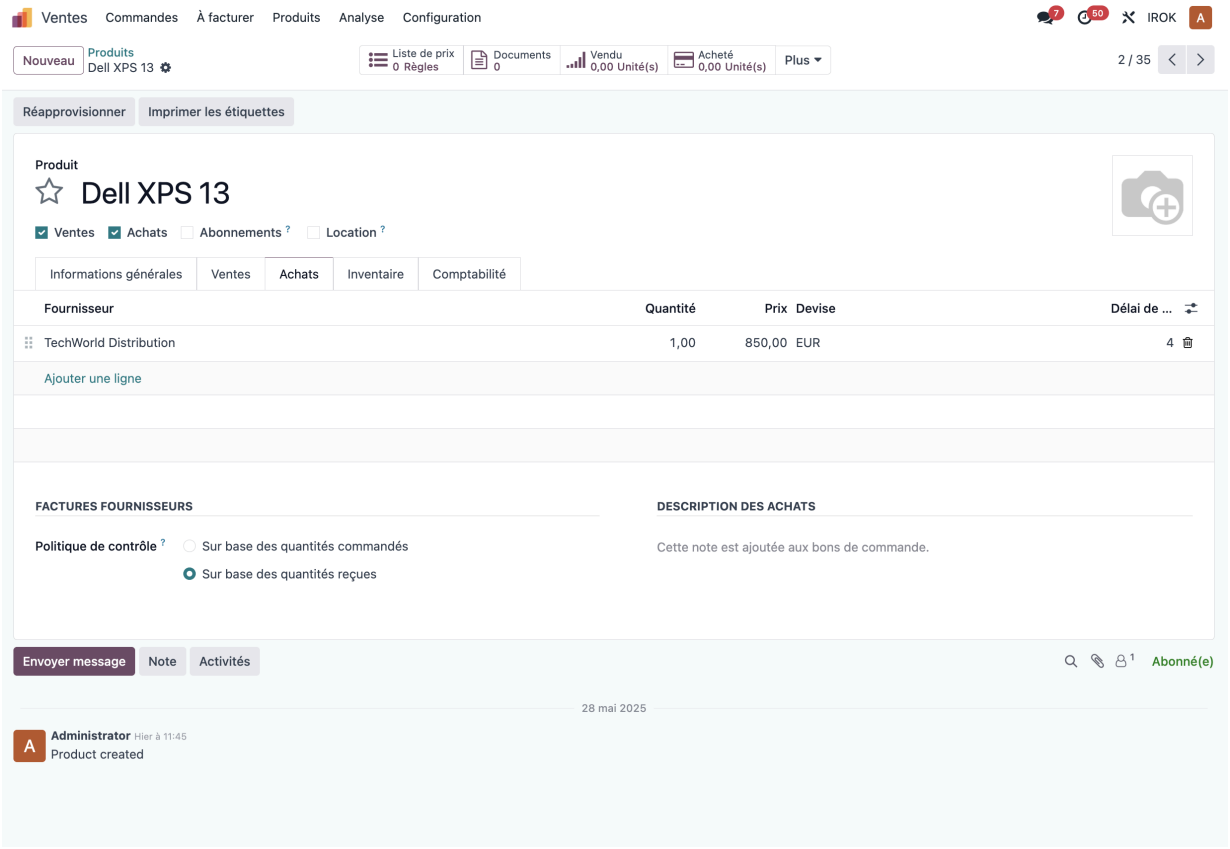


Figure 5.3: Configuring the purchase information of a product

5.3.5 Inventory

For storable products, the **Inventory** tab lets you configure:

- **Routes**: the supply flows (purchase, manufacture and so on).
- **Delivery Lead Time**: the average delivery time.
- **Minimum stock**: the replenishment threshold.
- **Reordering Rules**: automation of purchasing.
- **Stock Location**: where the product sits in your warehouse.

Note

For storable products, make sure the minimum stock levels and the reordering rules are properly configured, to avoid shortages.

5.4 Handling product variants

5.4.1 The concept of variants

Odoo lets you handle several variants of the same base product (different sizes, colours and so on) without creating separate product records.

An example of variants. A t-shirt can have:

- several sizes: S, M, L, XL;
- several colours: white, black, red, blue.

That gives sixteen possible combinations, handled as variants of a single base product.

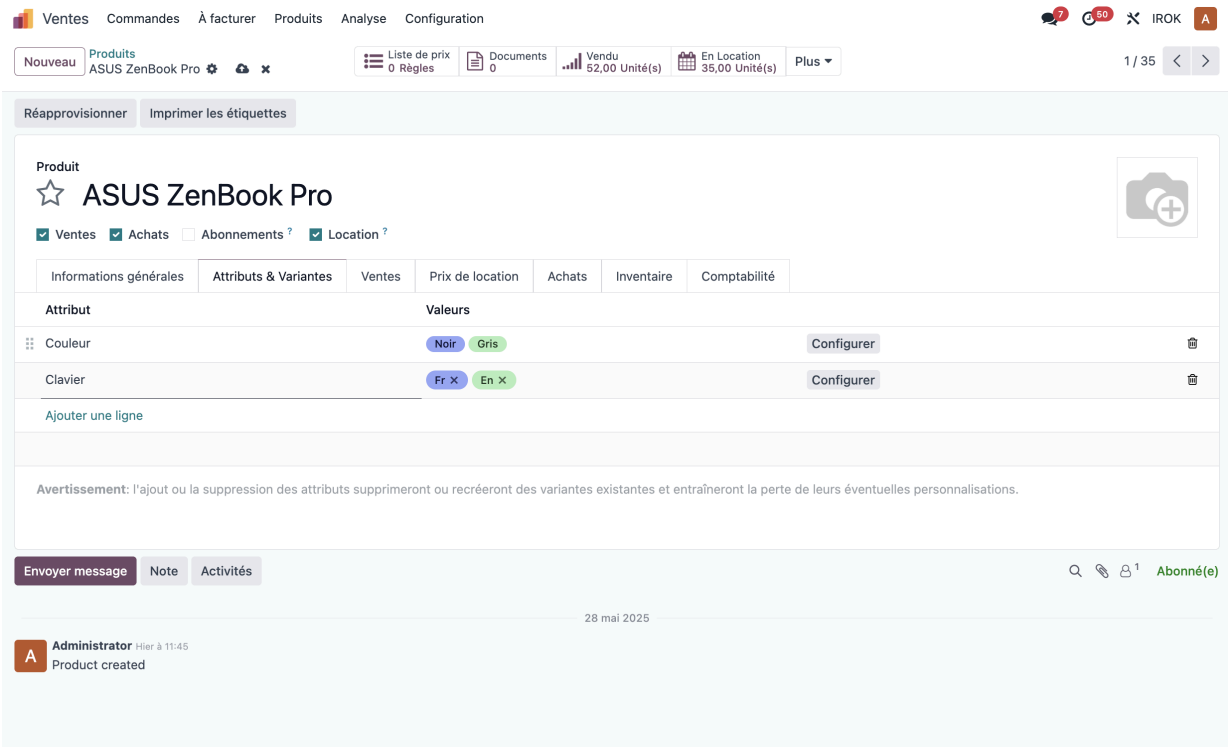


Figure 5.4: Configuring product variants

5.4.2 Configuring variants

To configure a product with variants:

1. Create a new product.
2. In the **Attributes** tab, click to add a line.
3. Select or create an attribute, “Size” for instance.
4. Add the possible values: “S”, “M”, “L”, “XL”.
5. Repeat for each attribute: colour, material and so on.
6. Odoo generates every possible combination automatically.

Tip

You can disable particular combinations if they are not available in your catalogue.

5.5 Organising the catalogue

5.5.1 Product categories

Categories let you organise your catalogue logically:

1. Open **Inventory → Configuration → Products → Product Categories**.
2. Build a hierarchy of categories and sub-categories.
3. Assign each product to the appropriate category.

A recommended category structure:

– create main categories by type of product (Electronics, Furniture, Services and so on);
– add more specific sub-categories (Computers, Screens, Peripherals);
– use no more than three levels, to keep navigation fluid.

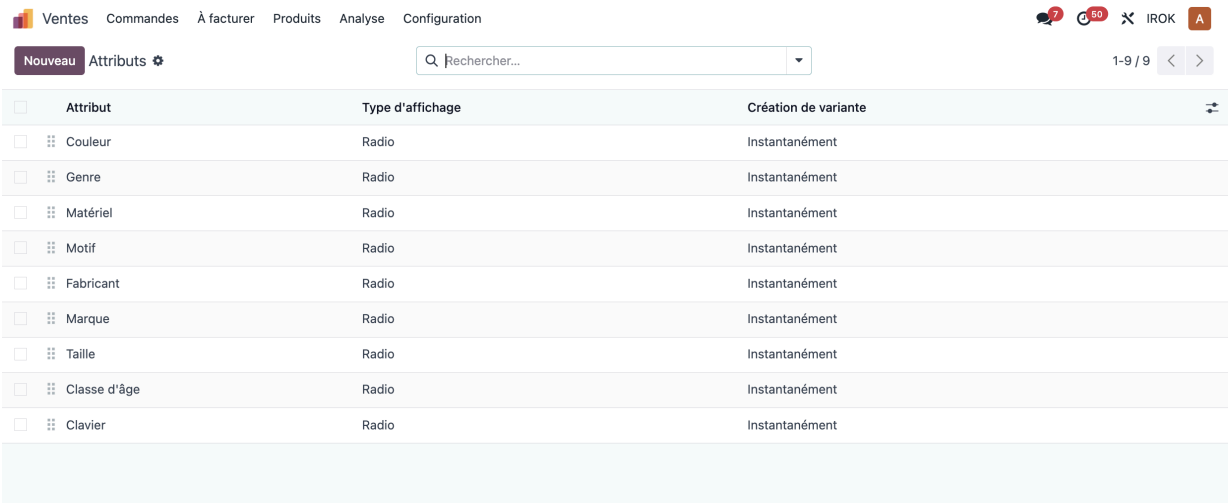


Figure 5.5: The hierarchy of product categories

5.5.2 Using tags

Tags complement categories by allowing a cross-cutting classification:

- a product belongs to a single category but can carry several tags;
- tags can be used for temporary promotions, special characteristics and so on;
- they make filtering in searches easier.

Tip

Combine categories (a vertical classification) and tags (a horizontal one) for the best organisation of your catalogue.

5.6 Advanced pricing

5.6.1 Pricelists

Odoo lets you handle several price structures:

1. Open **Sales → Products → Pricelists**.
2. Create the lists you need: retail, wholesale, export and so on.
3. Define the calculation rules: a percentage discount, a fixed amount and so on.
4. Assign those lists to the appropriate customers or categories of customer.

Examples of pricelists:

- list price: 100% of the standard price;
- reseller price: 80% of the standard price;
- wholesale price: 70% of the standard price plus a volume discount;
- promotional price: a temporary special price.

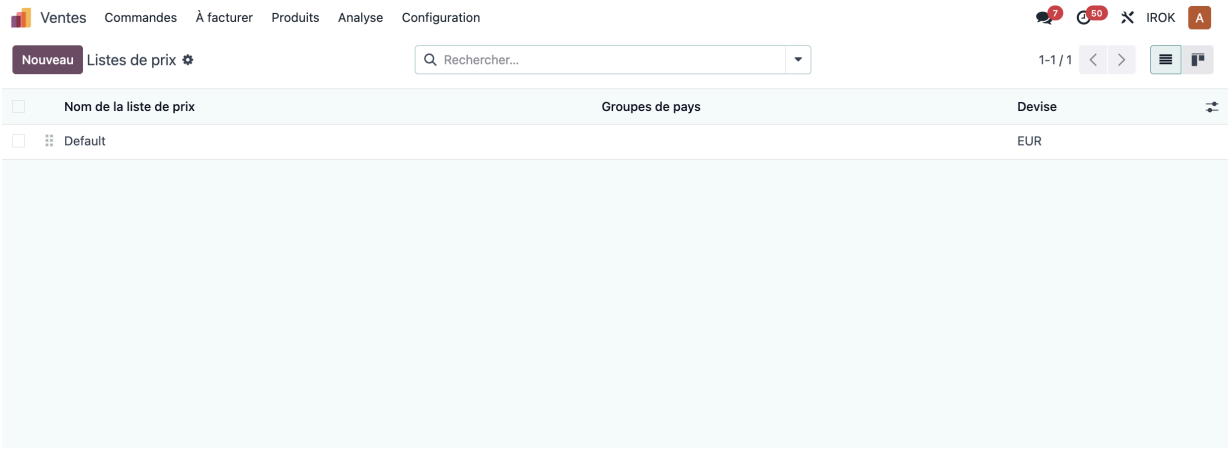


Figure 5.6: Configuring a pricelist with specific rules

5.6.2 Quantity discounts

To configure discounts based on quantity:

1. Open an existing pricelist.
2. Add a pricing rule.
3. Select the calculation method: percentage, fixed amount and so on.
4. Set the minimum quantity that triggers the discount.
5. You can create several discount breaks for the same product.

Tip

Quantity discounts encourage customers to increase their order volume. They work particularly well for consumables or for products bought repeatedly.

5.7 Handling costs

5.7.1 Costing methods

Odoo offers several methods for valuing stock:

- **Standard cost**: a fixed value set by hand.
- **Average cost (AVCO)**: the weighted average of the purchase costs.
- **FIFO**: first in, first out.
- **LIFO**: last in, first out, not available in every country.

Note

The costing method must be consistent with your accounting practice and with the regulations of your country. Consult your accountant to choose the most suitable method.

5.7.2 Updating costs

To update the standard costs:

1. Open the product concerned.
2. In the **Cost** field, change the value.
3. Save the changes.
4. Odoo can generate an accounting entry to reflect that revaluation.

5.8 Specific products and services

5.8.1 Handling services

Services in Odoo can be handled in several ways:

- **Basic services**: defined with a fixed price.

- **Time-based services**: invoiced on the time spent.
- **Subscription services**: invoiced automatically on a recurring basis.

Configuring a time-based service:

1. Create a product of type “Service”.
2. Enable time tracking in the Sales tab.
3. Set the invoicing method: prepaid, on timesheets and so on.
4. The hours spent can be tracked in the Project module.

5.8.2 Returnable items

For returnable packaging or containers:

1. Create a separate product for the returnable item.
2. Configure it as a storable product.
3. Link it to the main product in the advanced settings.
4. The system will handle the return flows automatically.

Note

Handling returnable items calls for specific configuration of the stock flows, so that returns and refunds are tracked correctly.

5.9 Importing products in bulk

To create many products quickly:

1. Prepare a CSV or Excel file with your product data.
2. Open the product list view.
3. Click **Import**.
4. Follow the import wizard to map the columns.
5. Confirm and run the import.

Tip

Start by importing a small sample to check that the format is right, then run the full import once you are satisfied with the result.

5.10 Good practice and advice

Advice for handling products effectively:

- adopt a consistent naming convention for all your products;
- use internal references systematically, to make searching easier;
- structure your categories before you start creating many products;
- complete every description, to make your teams’ work easier;
- attach good-quality images to your product records;
- review your costs regularly to keep your pricing relevant.

Note

The quality of your product catalogue has a direct effect on the efficiency of your sales, purchasing and logistics teams. An initial investment in a sound structure pays for itself many times over.

CHAPTER 6

Purchase management

Relation with the exercise book

This chapter matches Step 4 of the exercise book: **purchasing**. It gives you the concepts you need to run your supply processes effectively, from the request for quotation through to paying the vendor.

6.1 Introduction to purchasing in Odoo

Odoo's Purchase module lets you handle the whole supply cycle:

- creating and following requests for quotation;
- handling purchase orders;
- checking goods receipts;
- checking and validating vendor bills;
- analysing purchasing performance.

Note

Running purchasing well is essential to control costs and to keep the products your business needs available.

6.2 Initial configuration

6.2.1 Purchase settings

To configure the module to suit your needs:

1. Open **Purchase → Configuration → Settings**.
2. Set the main options:
   - **Purchase order approval**: enable it if you want an approval workflow.
   - **Lock confirmed orders**: to prevent changes after confirmation.
   - **Receipt reminders**: to send automatic reminders to vendors.
   - **Purchase Agreements**: an advanced feature for framework agreements, an optional module.
3. Click **Save** to apply the settings.

6.2.2 Configuring vendors

To work effectively with vendors:

1. Open **Contacts → Contacts**.
2. Create or edit the vendor contacts.
3. In the **Sales & Purchase** tab, configure:
   - the default payment terms;
   - the currencies accepted;
   - the average lead times.

6.2.3 Linking vendors to products

For each product you can define its potential vendors:

1. Open the product record.
2. In the **Purchase** tab, click **Add a line**.
3. For each vendor, set:
   - the vendor's name;
   - the purchase price;
   - the minimum quantity;

- the lead time;
- the vendor's reference.

4. You can add several alternative vendors.

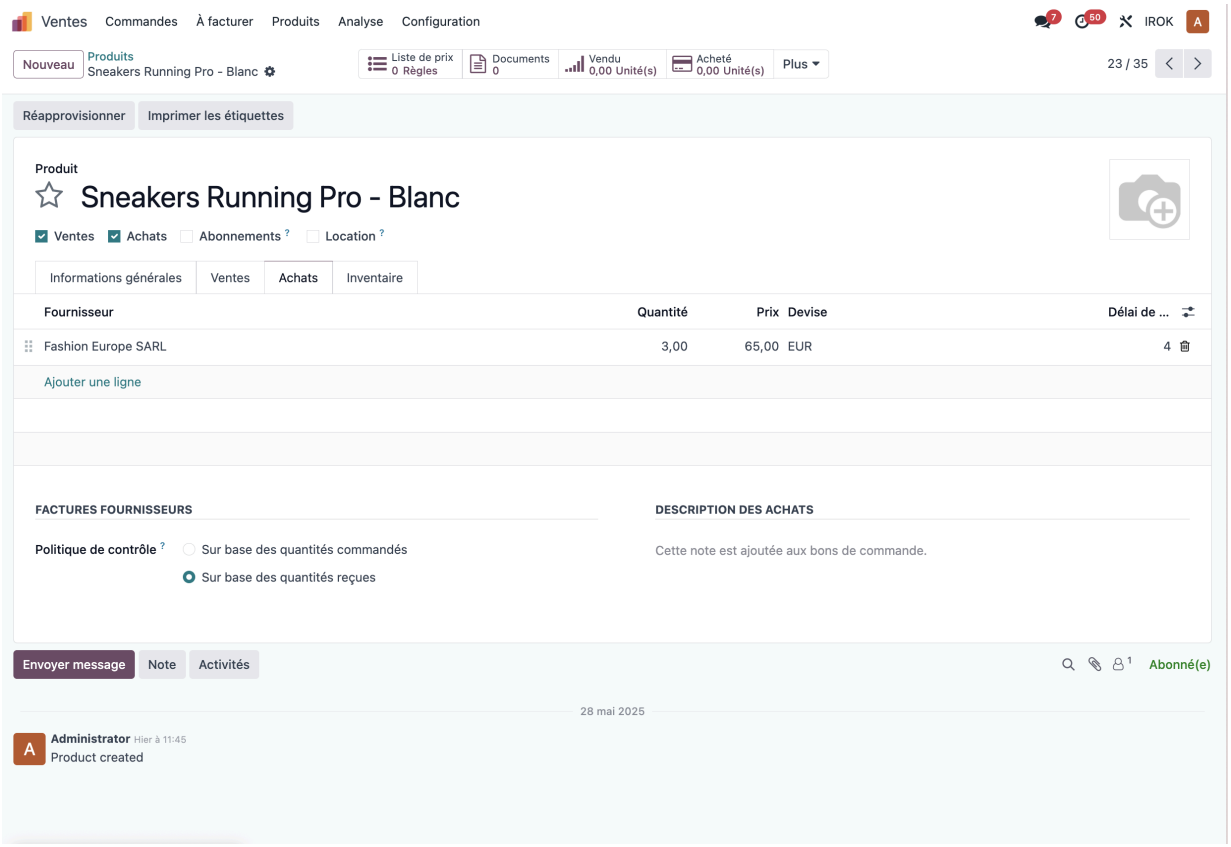


Figure 6.1: Linking a vendor to an item with its terms

Tip

When you create a request for quotation, Odoo automatically offers the preferred vendor for each product, along with the matching terms.

6.3 The purchasing process

6.3.1 Creating a request for quotation

To ask your vendors for a quotation:

1. Open **Purchase → Orders → Requests for Quotation**.
2. Click **Create**.
3. Select the vendor.
4. Add the products required with the quantities wanted.
5. For each line, check:
   - the unit price, offered automatically when it is set on the product record;
   - the expected delivery date;
   - the applicable taxes.
6. Save the request.
7. Use the send button to email it to the vendor.

The request for quotation is the starting point of the purchasing process and lets you ask vendors for their prices.

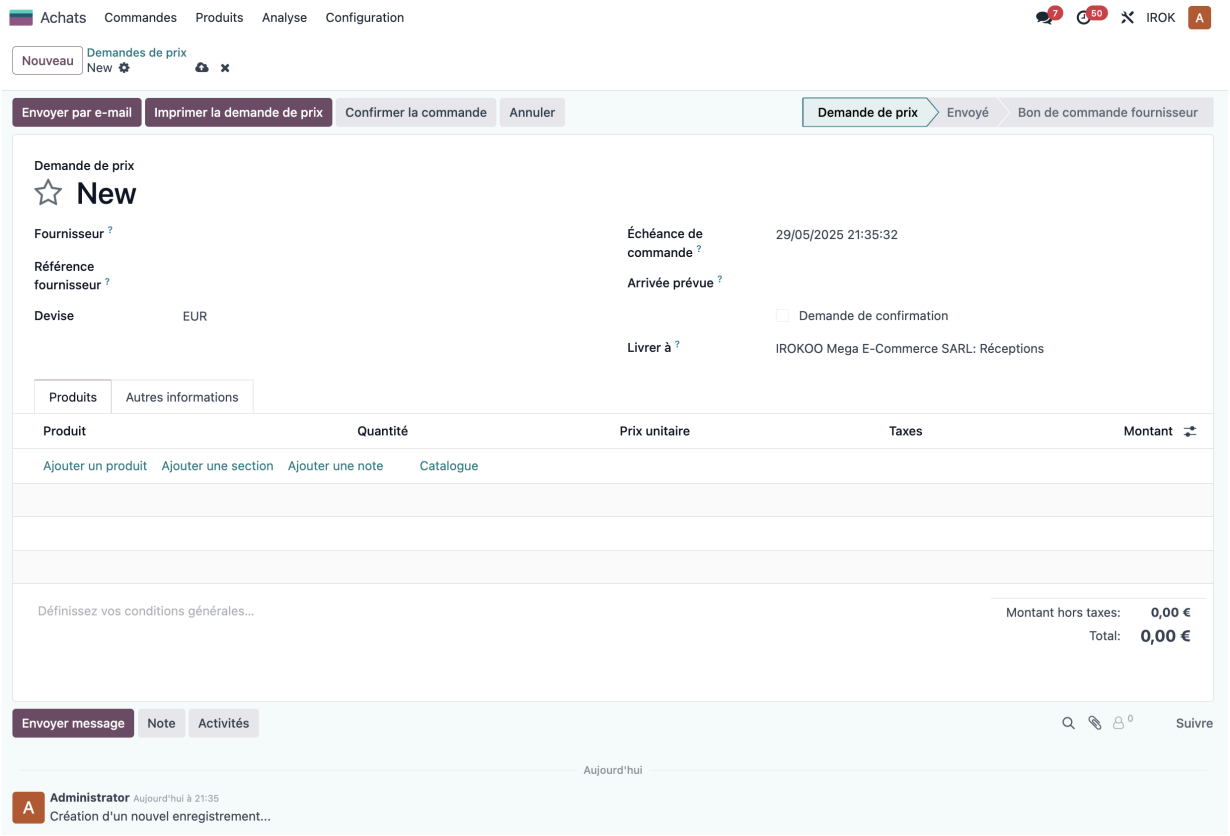


Figure 6.2: Creating a request for quotation

6.3.2 Converting into a purchase order

Once the vendor's confirmation has arrived:

1. Open the request for quotation concerned.
2. Adjust the prices if the vendor's answer calls for it.
3. Click **Confirm Order**.
4. The request becomes a purchase order with a new status.
5. A receipt is created automatically in the Inventory module.

Tip

You can configure several levels of approval for purchase orders according to their amount. That gives tighter control over significant spending.

6.4 Receiving products

6.4.1 Validating receipts

To record the receipt of the products ordered:

1. From the purchase order, click the **Receipt** button.
2. Check the products and the quantities to receive.
3. If the delivery is complete, simply click **Validate**.
4. For a partial delivery, adjust the quantities received and then validate.
5. The system automatically creates a new receipt for the quantities outstanding.

Validating receipts automatically updates the stock levels and the status of the orders.

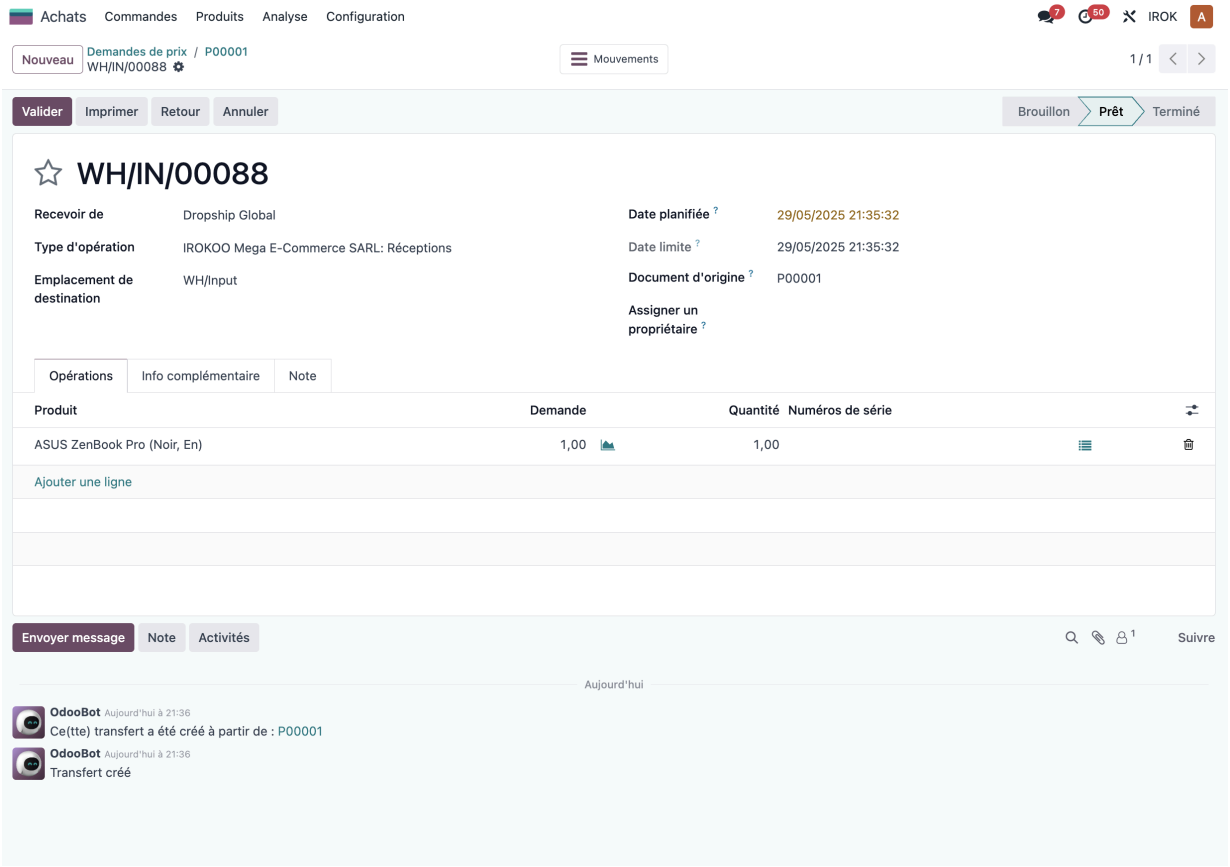


Figure 6.3: Validating a goods receipt

6.4.2 Handling partial deliveries

If your vendor delivers only part of the order:

1. On the receipt, change the **Done** column to state the quantities actually received.
2. Validate that partial receipt.
3. Odoo automatically creates a new receipt for the quantities missing.
4. That new receipt stays pending until the next delivery.

Note

Following partial deliveries is essential to keep your stock accurate and to track the items still awaited.

6.5 Handling vendor bills

6.5.1 Creating and validating bills

To handle your vendors' bills:

1. From the purchase order, click **Create Invoice**.
2. Choose the invoicing method according to the product configuration:
   - **On ordered quantities**: a bill based on the quantities ordered;
   - **On received quantities**: a bill based on the quantities actually received.
3. Check the amounts and the taxes.
4. Click to create the draft bill.
5. Check the bill, then click **Validate**.

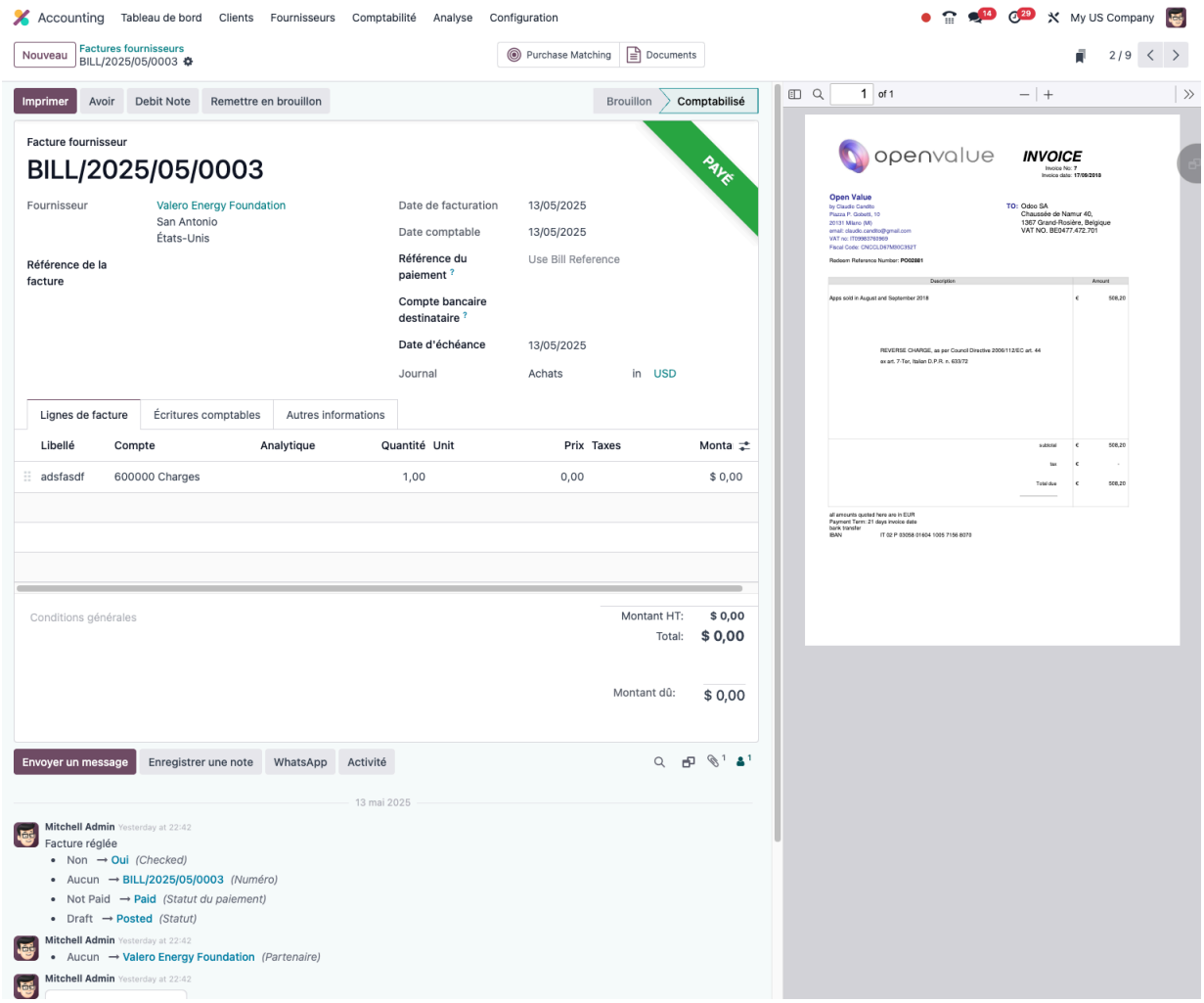


Figure 6.4: Creating a vendor bill from an order

6.5.2 Recording payments

To handle payments to vendors:

1. Open the bill concerned.
2. Click **Register a payment**.
3. Fill in:
   - the amount of the payment;
   - the date;
   - the payment method (cheque, transfer and so on);
   - the bank account used.
4. Confirm the payment.
5. The bill moves to the “Paid” status.

Tip

To pay several bills from the same vendor in one operation, use the **Vendor Payments** entry in the Accounting menu.

6.6 Automatic replenishment

6.6.1 Reordering rules

To automate your purchase orders:

1. Open **Inventory** → **Operations** → **Procurement** → **Replenishment**.

2. Create rules for each critical product:
   - the product concerned;
   - the minimum stock level;
   - the quantity to order;
   - the order multiple, for instance ordering in boxes of twelve;
   - the lead time.
3. Enable automatic supply in the settings.

6.6.2 Running the scheduler

To generate purchase proposals automatically:

1. Run the scheduler from the Inventory operations.
2. Odoo analyses the stock levels, the sales orders and the reordering rules.
3. Purchase proposals are generated.
4. Check those proposals in **Purchase → Orders → Requests for Quotation**.
5. Confirm the relevant proposals to create the requests for quotation.

Note

The scheduler can be configured to run automatically every night, which simplifies the daily running of stock.

6.7 Purchase analysis and reports

6.7.1 Analysing purchases

Odoo offers several tools for analysing your purchases:

1. **Purchase Analysis**: an overview of the orders by vendor, product and period.
2. **Order report**: to follow the status of your orders in progress.
3. **Receipt report**: to monitor the deliveries expected.
4. **Vendor performance**: to assess your vendors on quality, lead time and price.

6.7.2 Key performance indicators

To steer your purchasing activity, follow these indicators:

- average lead time by vendor;
- adherence to the promised dates;
- the gap between the negotiated price and the invoiced price;
- purchase volume by vendor, that is how concentrated your purchasing is;
- the quality of the goods delivered, measured by the rejection rate.

Tip

Build custom dashboards in Odoo to follow those key indicators and make decisions easier.

6.8 Advanced features

Note

The features described in this section require optional modules that are not part of the base Odoo installation. Contact your system administrator to have them enabled.

6.8.1 Purchase agreements

Purchase agreements let you negotiate long-term contracts with your vendors:

1. Open **Purchase → Orders → Purchase Agreements**.
2. Create a new agreement, setting:
   - the vendor;

- the period of validity;
- the products concerned with their negotiated prices;
- the minimum or maximum quantities.

3. Once the agreement is confirmed, you can create orders based on it.

Purchase agreements let you formalise your understandings with vendors and simplify recurring orders.

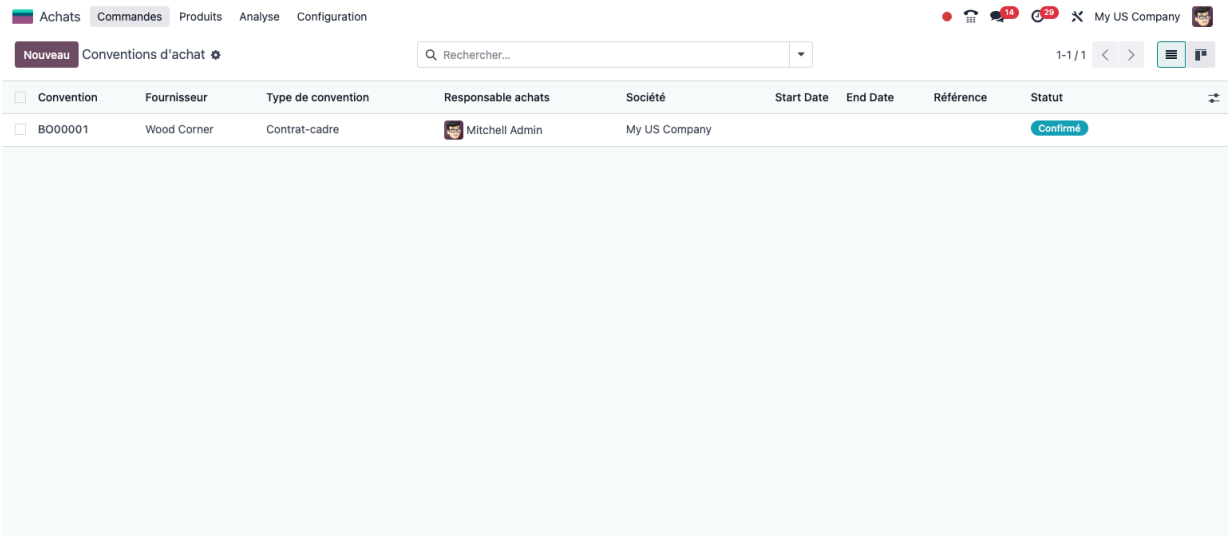


Figure 6.5: Configuring a vendor purchase agreement

6.8.2 Purchase requests

To let teams ask for supplies:

1. Enable the feature in the purchase settings.
2. Users can create purchase requests from the Purchase menu.
3. Those requests follow an approval process before being turned into orders.

Tip

Purchase requests are particularly useful in large organisations, where purchasing decisions have to follow an approval hierarchy.

6.9 Handling subcontracting

6.9.1 Configuring subcontracting

To run your subcontracted operations effectively:

1. Create a service product for each subcontracted operation.
2. Configure your subcontractors as vendors.
3. Include those operations in the manufacturing bills of materials.
4. State that they are subcontracted steps.

Note

Subcontracting in Odoo combines the Purchase, Inventory, Manufacturing and MRP Subcontracting modules to give full tracking of the process. That advanced feature calls for specific configuration of the bills of materials and of the production flows.

6.9.2 The subcontracting flow

A typical subcontracting process comprises:

1. sending the raw materials to the subcontractor;
2. tracking the materials in transit;

3. receiving the processed products;
4. invoicing the subcontracting service.

6.10 Good practice and advice

Advice for improving your purchasing:

- **Consolidation**: group your orders by vendor to obtain better terms and reduce delivery costs.
- **History**: analyse the price history to spot trends and negotiate effectively.
- **Assessment**: put in place a regular assessment of your vendors.
- **Anticipation**: use reordering rules to avoid shortages.
- **Checking**: systematically check that deliveries and bills are as agreed.
- **Alternatives**: always identify at least two vendors for your strategic products.

Note

Rigorous purchasing can improve your profitability considerably. Depending on the sector, purchases often represent 50 to 70% of the cost of goods sold.

CHAPTER 7

Inventory

Relation with the exercise book

This chapter matches Step 5 of the exercise book: **configuring the inventory**, in particular three-step receipts (receive, quality control, put in stock) and two-step shipping (pick and ship).

7.1 Introduction to inventory

Odoo's Inventory module lets you:

- track stock levels accurately;
- handle goods receipts and deliveries;
- carry out physical stocktakes;
- organise your warehouse with locations;
- plan replenishment;
- analyse the valuation of your stock.

Note

Running stock well is crucial to avoid shortages, to limit overstocking and to make the best use of your cash.

7.2 Initial configuration

7.2.1 Inventory settings

To configure the module to suit your needs:

1. Open **Inventory → Configuration → Settings**.
2. Enable the features you need:
   - **Multi-warehouse**: if you run several storage sites.
   - **Multi-Step Routes**: for complex receipt and shipping processes.
   - **Lots & Serial Numbers**: for product traceability.
   - **Storage Locations**: for a fine-grained organisation of the warehouse.
   - **Packaging**: to handle packagings.
   - **Quality**: for checks before storage.
3. Save the settings.

Note

The multi-step configuration requires the **Multi-Step Routes** option to be enabled in the Inventory settings. That feature matters particularly to businesses with strict quality requirements or complex logistics.

7.3 Warehouse structure

7.3.1 Configuring warehouses

To define your storage spaces:

1. Open **Inventory → Configuration → Warehouse Management → Warehouses**.
2. For each warehouse, configure:
   - the name and the short code;
   - the address;

  - the person responsible.
3. Save the information.

7.3.2 Structure of the locations

Structure your storage space logically:

1. Open **Inventory → Configuration → Warehouse Management → Locations**.
2. Build a consistent hierarchy of locations:
   - a receiving location;
   - a quality control location;
   - main storage, with sub-locations: aisles, shelves and so on;
   - a shipping location;
   - special locations: returns, quarantine and so on.

Tip

A consistent naming scheme for your locations (ZONE-AISLE-SHELF-LEVEL for instance) makes navigation and picking considerably easier.

7.4 Configuring stock operations

7.4.1 Operation types

Operation types define how products move through your warehouse:

1. Open **Inventory → Configuration → Warehouse Management → Operations Types**.
2. Configure the three-step receipt operations:
   - initial receipt, into the receiving location;
   - quality control;
   - transfer into final storage.
3. Configure the two-step delivery operations:
   - picking;
   - shipping.

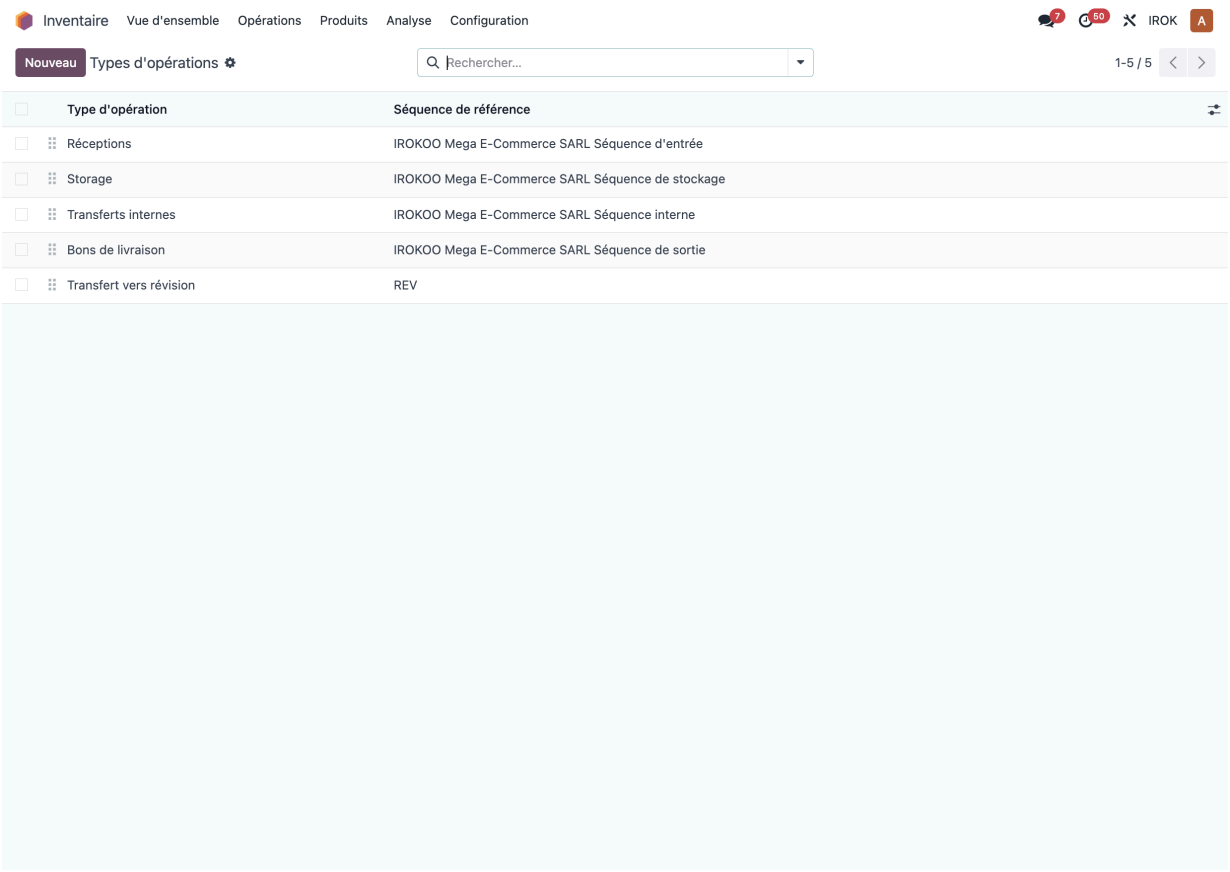


Figure 7.1: Configuring the inventory operation types

7.4.2 Configuring multi-step flows

To put a three-step receipt process in place:

1. Open **Inventory → Configuration → Warehouse Management → Warehouses**.
2. Select the warehouse to configure.
3. In the **Configuration** tab, set:
   - incoming: **Receive, Quality Control, then Store (3 steps)**
   - outgoing: **Pick then Deliver (2 steps)**.
4. Save the changes.
5. Odoo automatically creates the matching operation types and rules.

7.5 Receiving goods

7.5.1 The three-step receipt process

Here is how the complete receipt process works:

1. **Step 1: initial receipt.**
   - The goods arrive at the warehouse.
   - The receipt is recorded in Odoo, with the gross quantities.
   - The products are placed in the inbound location.
2. **Step 2: quality control.**
   - Transfer to the quality control location.
   - Detailed checking of the products against the criteria set.
   - Where goods do not conform, a return or quarantine process.
3. **Step 3: storage.**
   - The approved products are transferred to their final storage locations.
   - The quantities available for sale are updated.
   - The receipt process is closed.

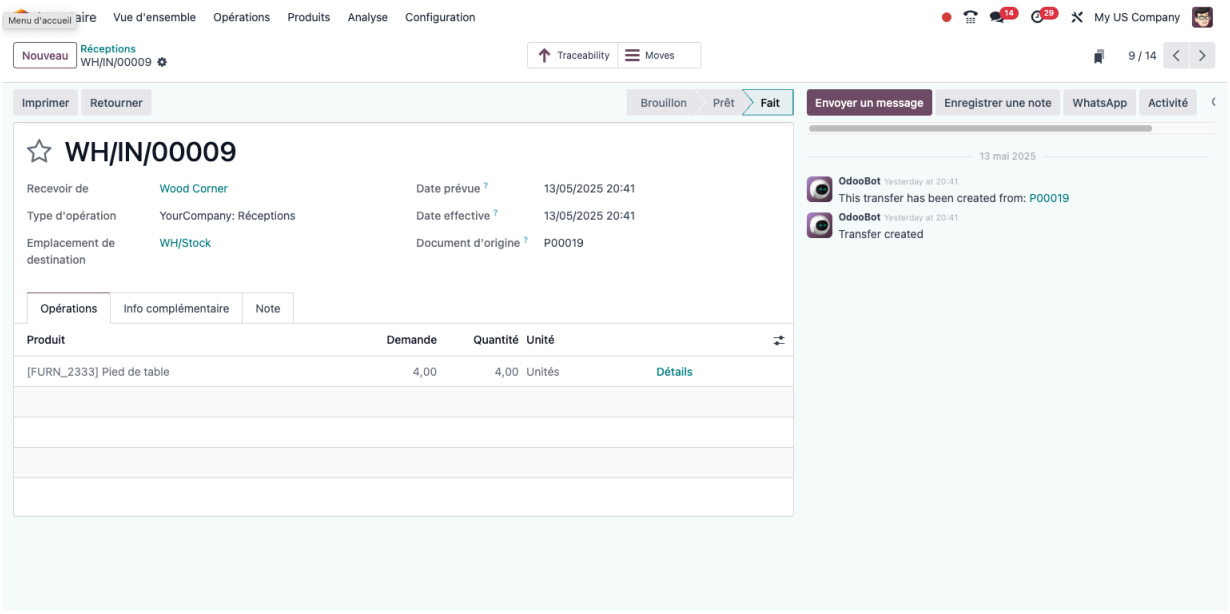


Figure 7.2: The product receipt screen

7.6 Delivering products

7.6.1 The two-step shipping process

The shipping process runs as follows:

1. **Step 1: picking.**
   - A picking order is generated from the sales orders.
   - The products are collected from the storage locations.
   - They are gathered in the outbound location.
2. **Step 2: delivery.**
   - The products are packed.
   - The shipping documents are prepared.
   - The goods are loaded and sent to the customer.

Tip

Use picking waves to shorten the walking in the warehouse, by grouping several orders into a single collection round.

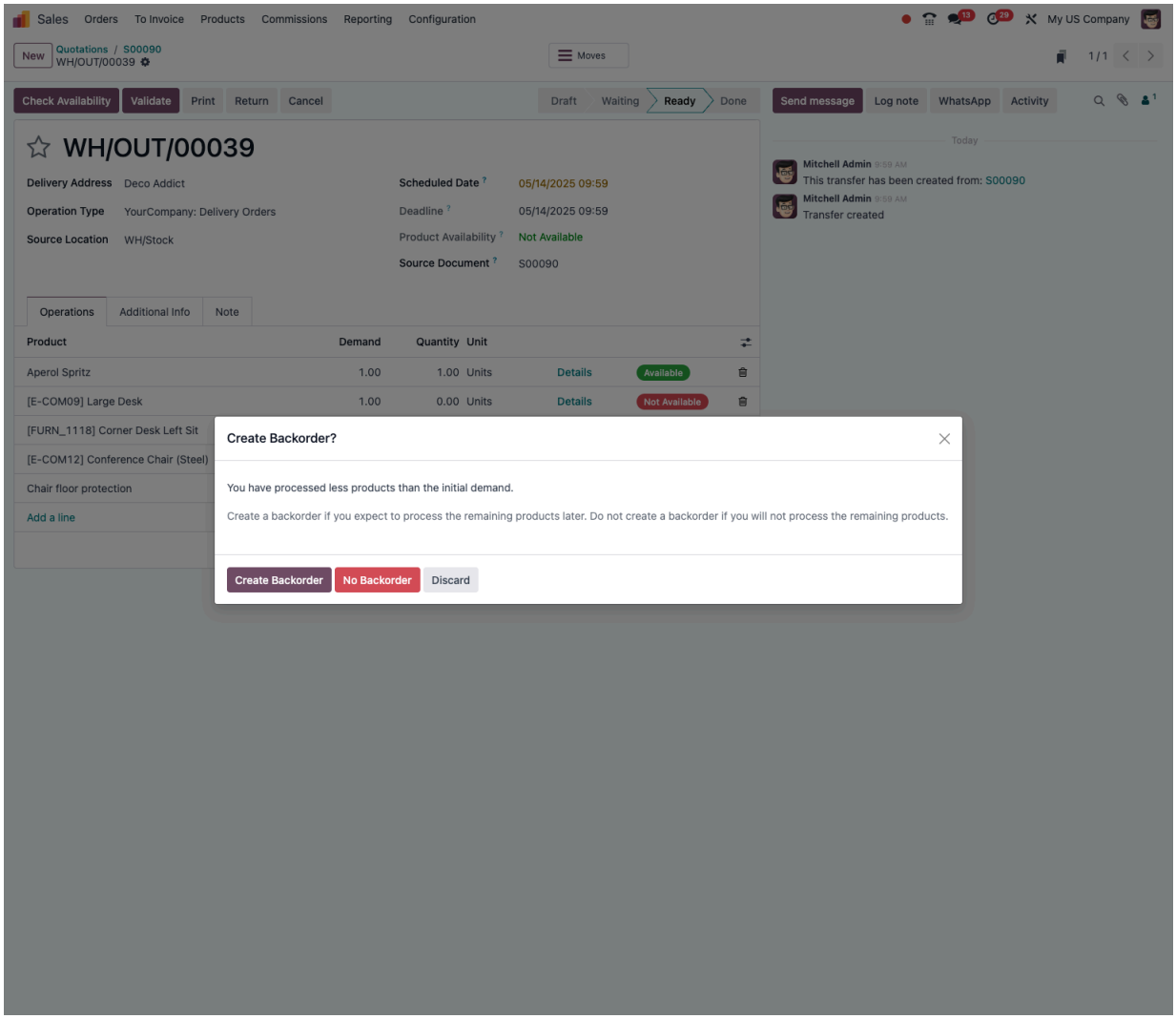


Figure 7.3: Handling a partial delivery

7.7 Reordering rules

7.7.1 Configuring automatic rules

To keep stock at the right level:

1. Open **Inventory** → **Operations** → **Procurement** → **Replenishment**.
2. Create a new rule, setting:
   - the product concerned;
   - the minimum quantity, the trigger threshold;
   - the maximum quantity, the target level;
   - the order multiple, for instance ordering in boxes of ten;
   - the estimated lead time.
3. Enable the automatic option to generate purchase proposals with no manual step.

Note

Well-set reordering rules avoid both stock-outs and excessive capital tied up in inventory.

7.8 Physical stocktakes

7.8.1 Carrying out a stocktake

To check and adjust your stock levels:

1. Open **Inventory → Operations → Adjustments → Physical Inventory**.
2. Create a new count, setting:
   - the name and the planned date;
   - the products concerned, all of them or a selection;
   - the locations to count.
3. Start the count.
4. Count the products physically.
5. Enter the actual quantities counted.
6. Validate the count to adjust the stock automatically.

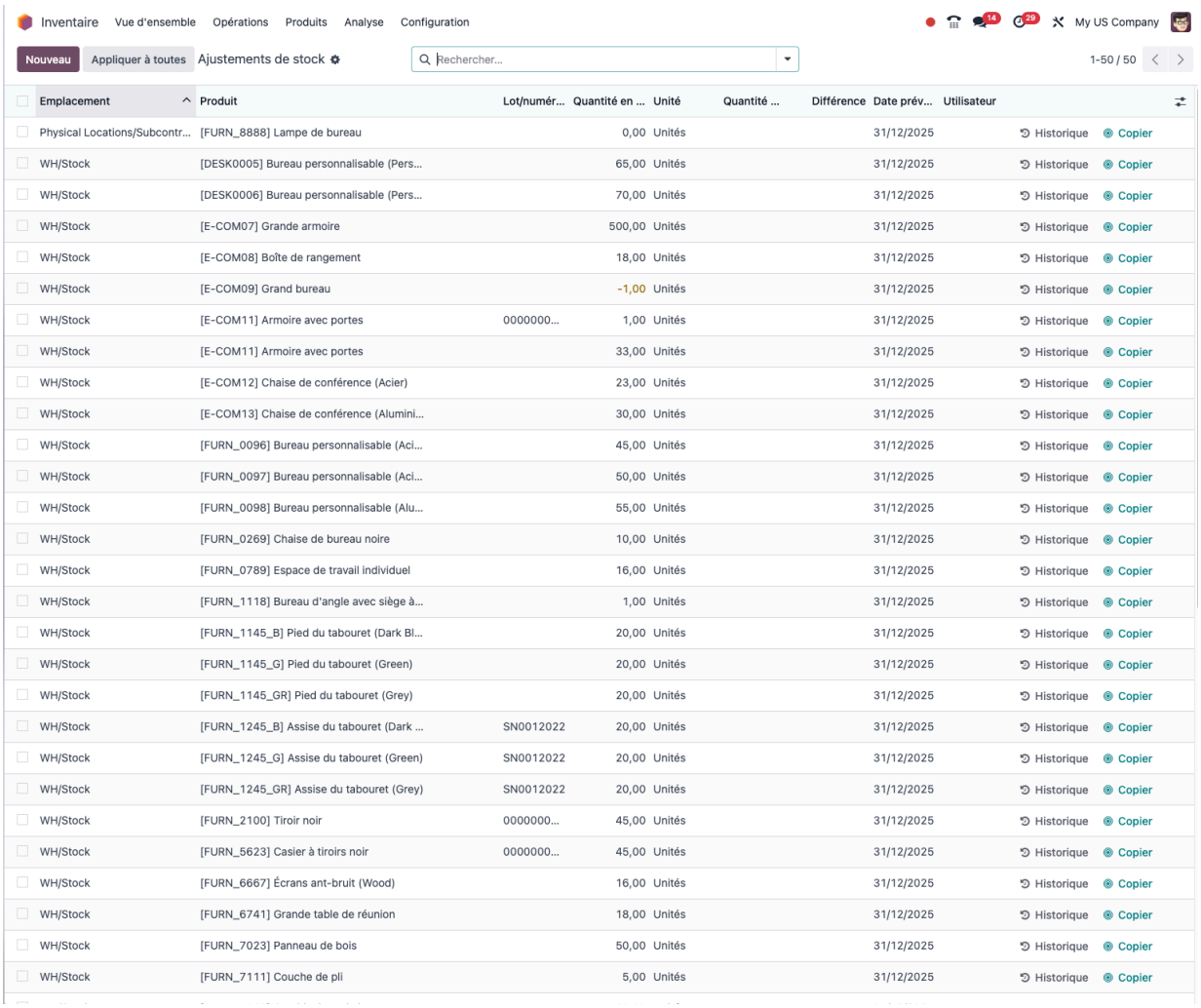


Figure 7.4: Carrying out a physical stocktake

7.9 Product traceability

7.9.1 Handling lots and serial numbers

To track your products precisely:

1. Configure traceability on the product record:
   - **By Lots**: for products made or received in groups;
   - **By serial numbers**: for products tracked one by one.
2. During stock operations:
   - assign or create lot or serial numbers on receipt;
   - state the lots or serials on moves and shipments;
   - follow the full history through **Inventory → Reporting → Moves History**.

Tip

Traceability by lot or serial number is essential in regulated industries (food, pharmaceutical, aerospace) and makes handling potential recalls easier.

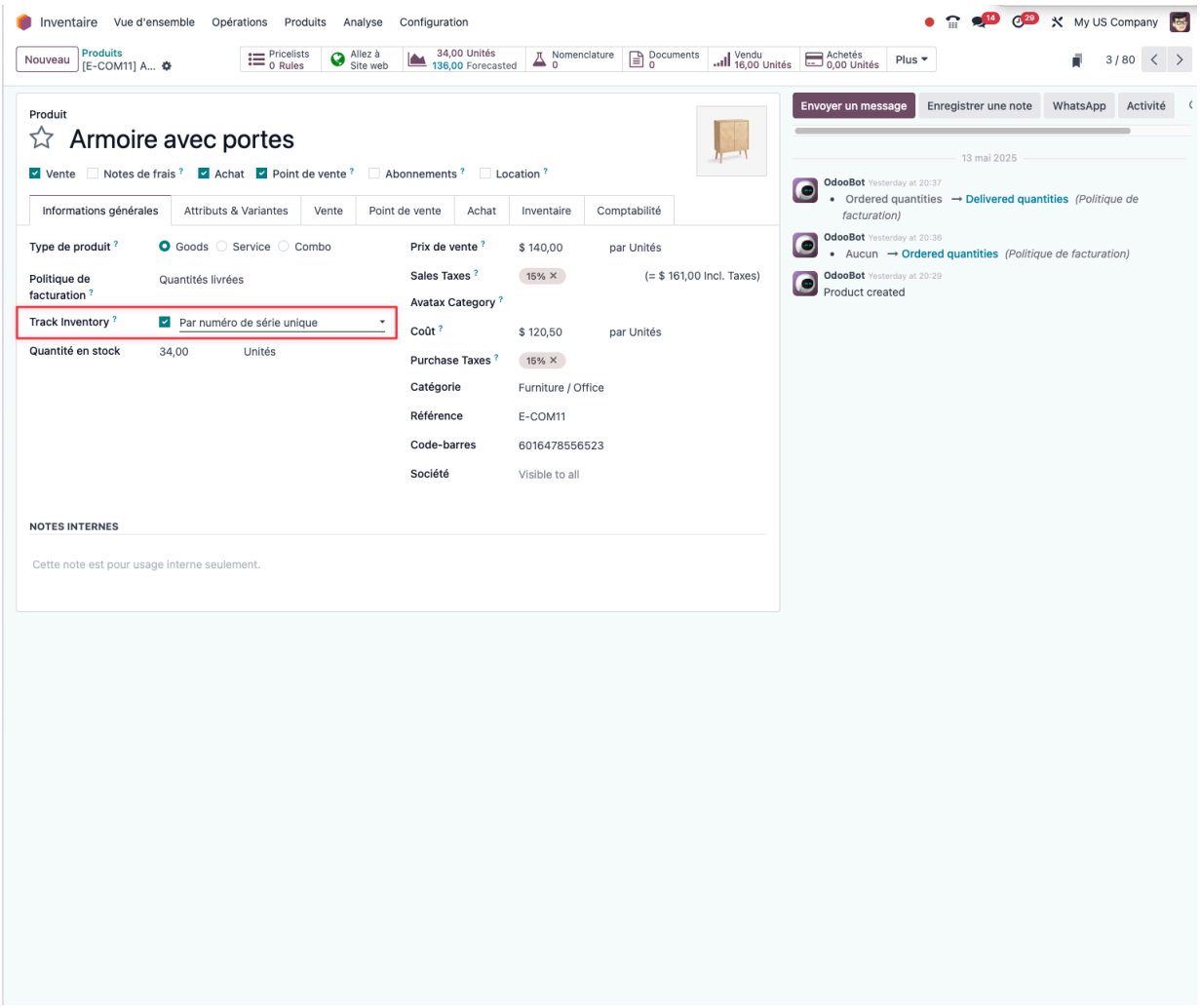


Figure 7.5: Following the traceability of a product

7.10 Reports and analysis

To analyse how you run your stock:

1. **Stock valuation**: the financial value of your inventory.
2. **Stock Moves**: the detailed history of every transaction.
3. **Forecast**: a forward view of future stock levels.
4. **Performance**: an analysis of turnover and of logistics efficiency.

Note

Reviewing those reports regularly will show you where your supply chain can be improved.

7.11 Key points for running inventory well

- define a clear and consistent warehouse structure;
- configure the multi-step flows carefully to match your processes;
- put reordering rules in place suited to each category of product;
- carry out regular counts, ideally on a rolling basis;

- use traceability for critical or regulated products;
- review the performance of your stock management regularly.

Tip

The quality of your stock management depends as much on the operational processes as on their configuration in Odoo. Make sure your teams are properly trained in the procedures defined.

CHAPTER 8

Sales and contacts

Relation with the exercise book

This chapter matches Steps 2 and 6 of the exercise book: **setting up the customer contacts** and **first quotations and sales**. It gives you the concepts you need to handle your contacts and the whole sales cycle, from quotation through to delivery of the goods.

8.1 Handling contacts

8.1.1 Introduction to contacts

In Odoo, contacts gather all your business partners: customers, prospects, vendors, employees and so on. Keeping them in one place maintains a single consistent database for every application.

Note

The same contact can hold several roles at once: being both a customer and a vendor, for instance.

8.1.2 Types of contact

Companies and individuals. Odoo distinguishes two main types of contact:

1. **Companies**: legal entities (businesses, associations, institutions and so on).
2. **Individuals**: natural persons.

Individuals can be attached to a company, which builds a hierarchy of contacts, useful for handling the different people within the same organisation.

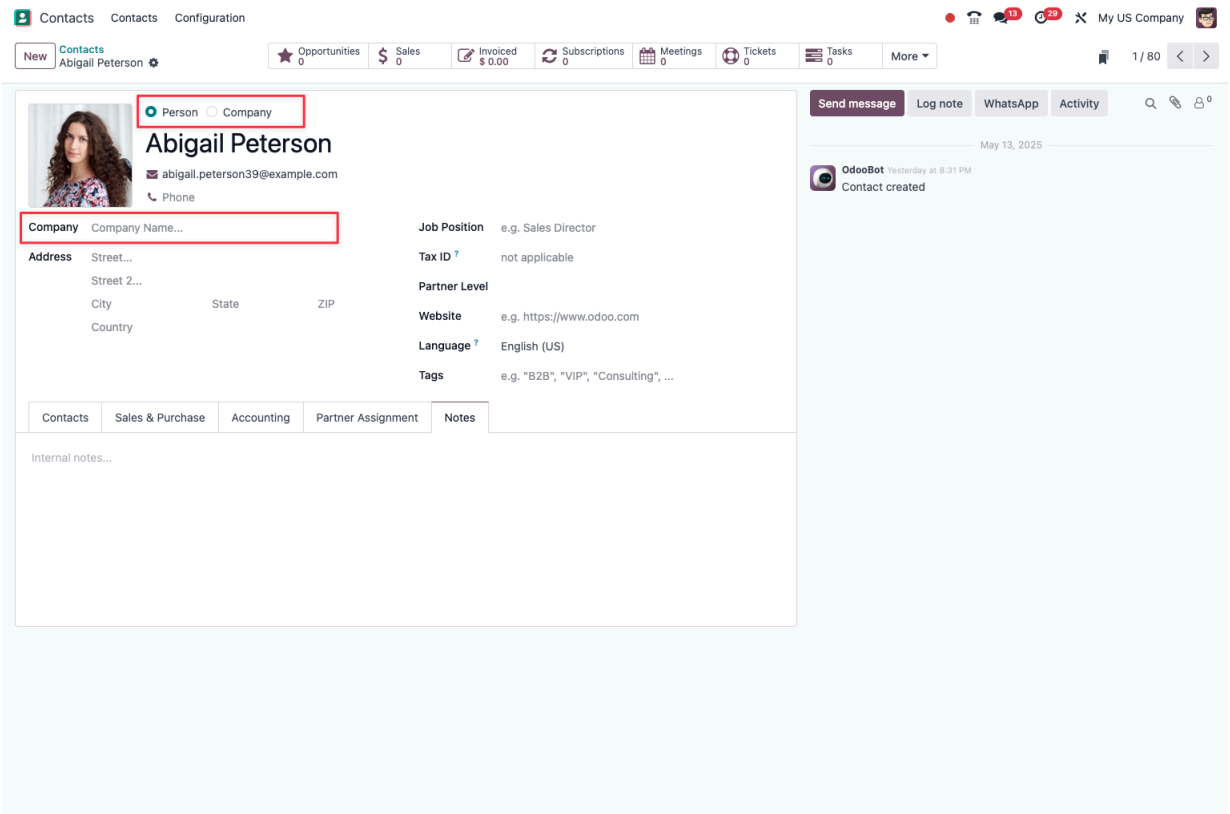


Figure 8.1: Telling a company contact from an individual

Partner categories. Contacts can be classified by their role in your business:

- **Customers**: partners who buy your products or services.
- **Vendors**: partners you buy from.
- **Prospects**: potential customers not yet converted.
- **Other**: any other partner you need (banks, public bodies and so on).

Tip

In Odoo, the customer/vendor classification works through an automatic ranking system. There is no "is a customer" or "is a vendor" checkbox. Instead Odoo uses `customer_rank` and `supplier_rank` fields which rise on their own:

- when you create a customer invoice, the customer rank rises;
- when you create a vendor bill, the supplier rank rises;
- the higher the rank, the earlier the partner appears in the lists.

8.1.3 Creating and editing contacts

Reaching the Contacts module. To handle your contacts:

1. Click the **Contacts** application in the main menu.
2. Or reach it from any application through the application switcher.

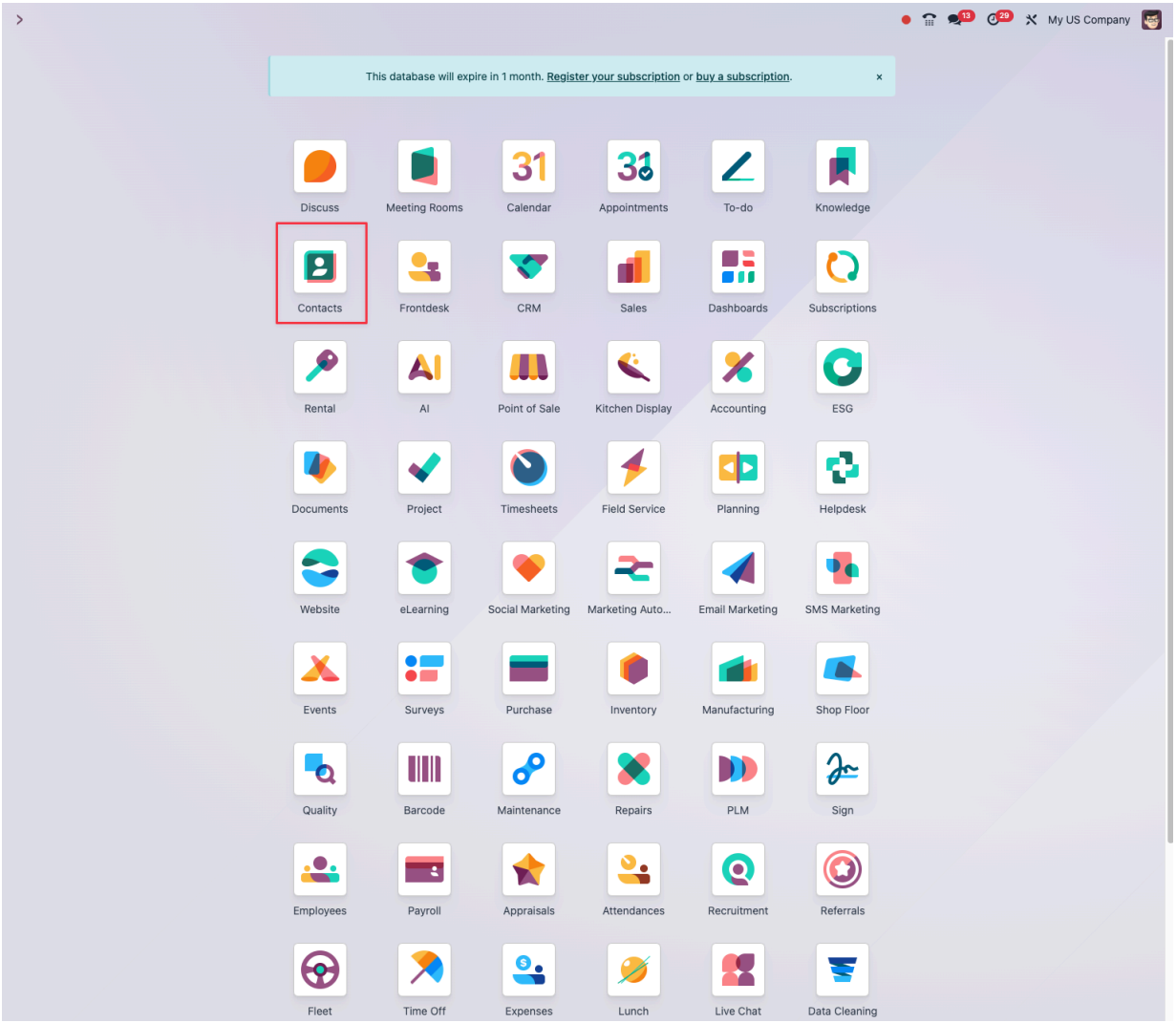


Figure 8.2: The Contacts application in the Odoo interface

Creating a new contact. To add a new contact:

1. In the Contacts application, click **Create**.

2. Choose the type of contact: company or individual.
3. Fill in the basic information:
   - the name, that is the registered name for a company;
   - the full address: street, city, postcode, country;
   - the contact details: phone, mobile, email;
   - the website, for a company.
4. If needed, set the status: customer and/or vendor.
5. Add tags to classify the contact.
6. Click **Save**.

Adding a contact attached to a company. To create an individual contact attached to a company:

1. Open the company record.
2. Go to the **Contacts & Addresses** tab.
3. Click **Add**.
4. Fill in the contact's information:
   - first name and surname;
   - job position in the company;
   - direct contact details: phone, email.
5. Click **Save & Close**.

Note

Contacts attached to a company inherit its address by default, but you can state a different address where needed.

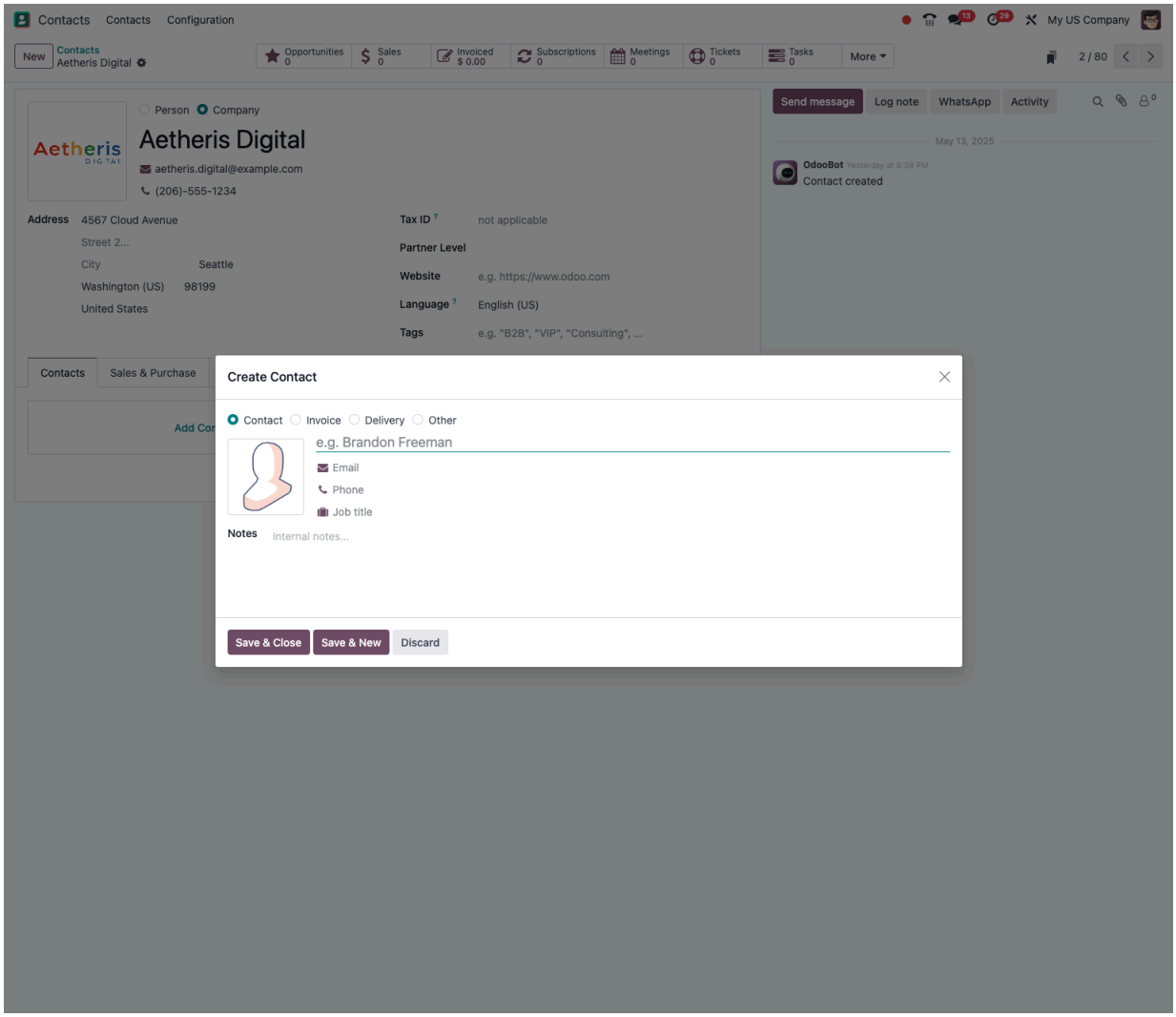


Figure 8.3: Individual contacts attached to a company

Editing an existing contact. To update a contact's information:

1. Find the contact in the list, or use the search bar.
2. Click their name to open the record.
3. Click the **Edit** button.
4. Make the changes needed.
5. Click **Save**.

To edit several contacts at once:

1. In list view, select the contacts to edit by ticking their boxes.
2. Click the first row of the list in the column to change.
3. Change the value of the column: the change applies to every contact selected.
4. Click **Save**.

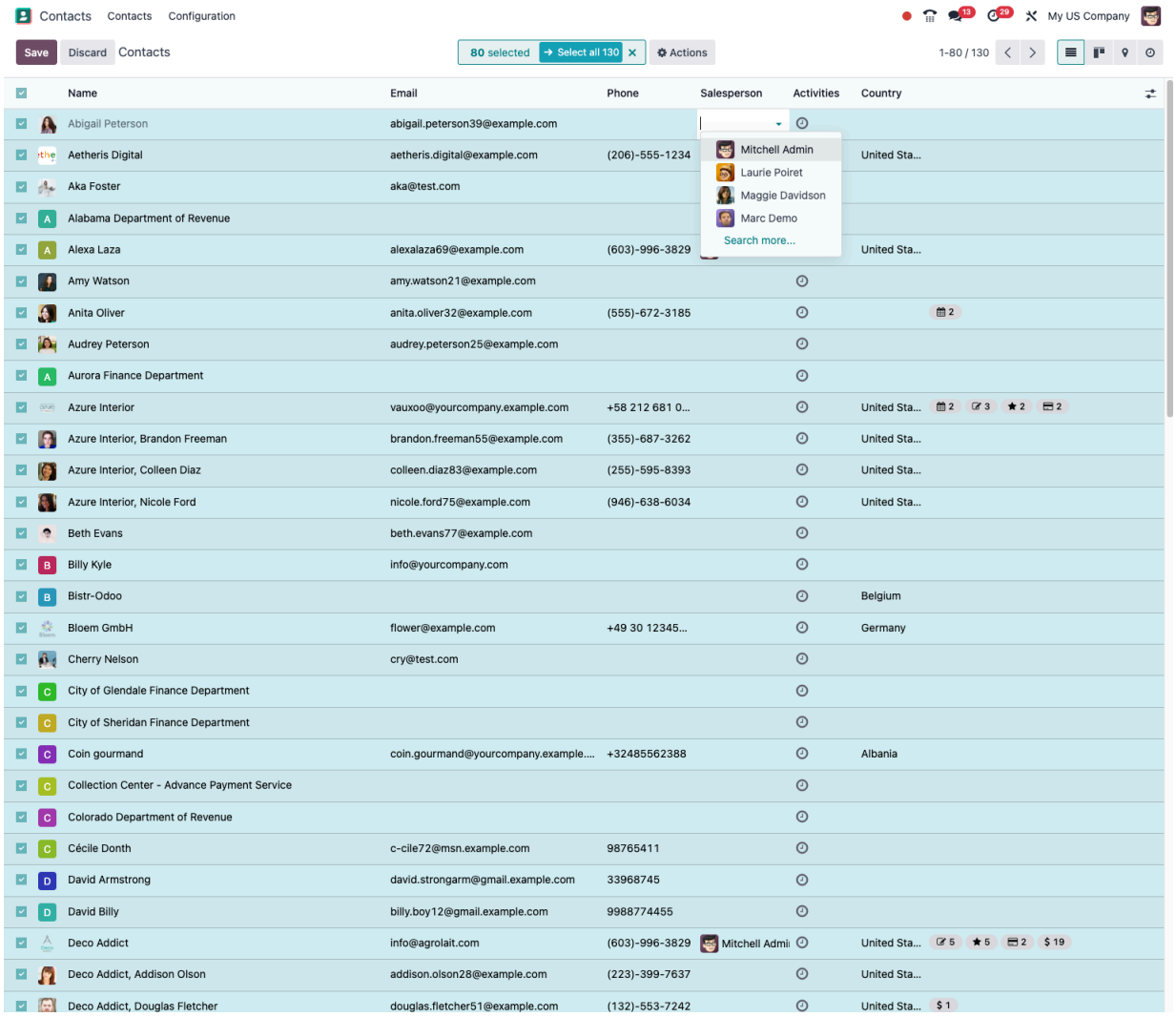


Figure 8.4: Editing contacts in bulk

8.2 Introduction to sales in Odoo

Odoo's Sales module handles the whole sales cycle, from quotation through to invoicing, by way of the order and the delivery. This chapter details the main steps of the sales process and explains how to use those features effectively day to day.

Note

The standard sales process in Odoo generally follows this sequence: quotation, confirmed order, delivery, invoice, payment.

8.3 Initial configuration

8.3.1 Sales settings

To configure the Sales module to suit your needs:

1. Open **Sales → Configuration → Settings**.
2. Configure the main options:
   - **Quotations**: numbering format, default validity period.
   - **Team management**: enabling sales teams.
   - **Electronic signature**: for online acceptance of quotations.
   - **Online Payment**: to let customers pay straight from the quotation.
3. Advanced options:

  - **Variants**: to handle different versions of the same item.
  - **Units of Measure**: to sell in different units (pieces, kg, boxes and so on).
  - **Pricing**: multiple pricelists, discounts and so on.
4. Click **Save** to apply the settings.

8.3.2 Sales teams

To organise your sales force:

1. Open **Sales → Configuration → Sales Teams**.
2. Create or edit the teams to suit your needs:
   - the team name: by region, product or customer segment;
   - the team leader;
   - the team members;
   - the sales targets.
3. Each salesperson can belong to one or several teams.

Tip

Defining sales teams organises the sales work better and makes it easier to analyse performance by segment of activity.

8.4 Quotations

8.4.1 Creating a new quotation

To create a new quotation in Odoo:

1. Open the **Sales** module.
2. Click **Quotations** in the side menu.
3. Click the **Create** button.
4. Fill in the information of the quotation:
   - select the customer, or create a new one;
   - check the expiration date;
   - choose the sales team and the salesperson responsible;
   - add the product lines by clicking **Add a product**
   - for each line, state the quantity and check the price;
   - apply discounts where needed.
5. Check the payment and delivery terms.
6. Click **Save**.

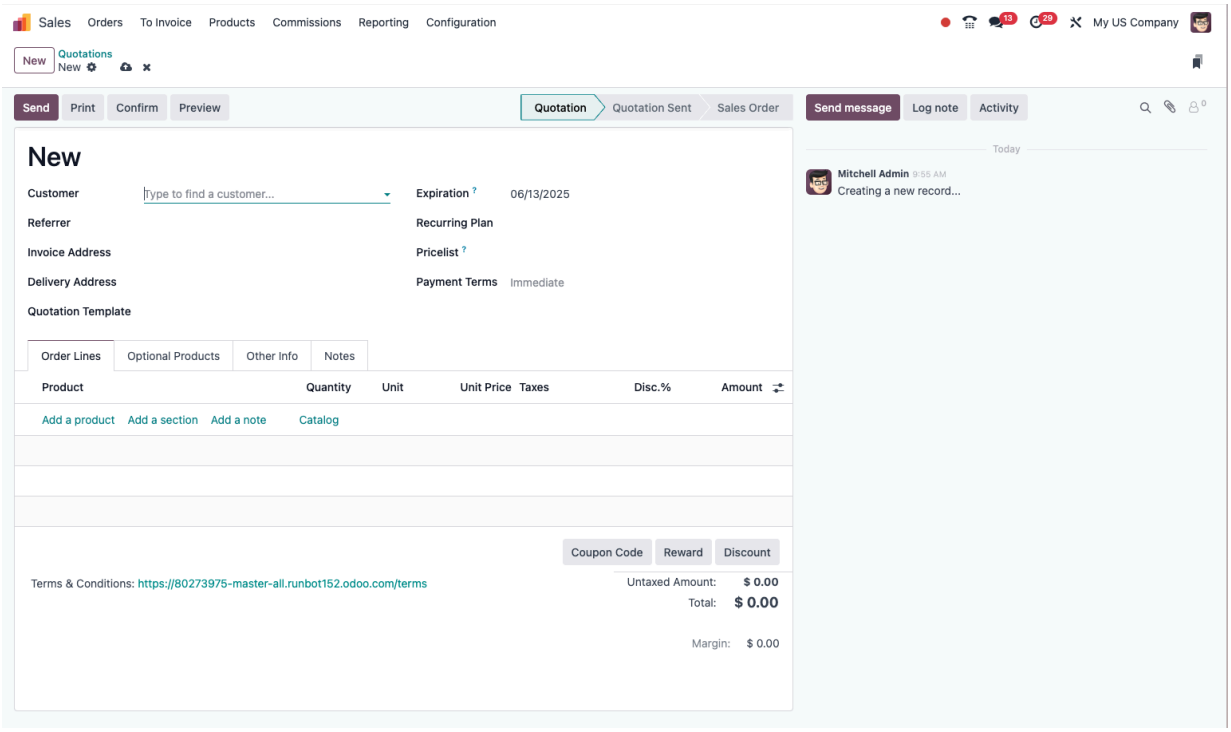


Figure 8.5: The quotation creation form

Tip

To create similar quotations quickly, use the **Duplicate** option on an existing quotation, then change only the information that differs.

8.4.2 Using quotation templates

Note

Quotation templates require the “Sales Management” module (`sale_management`), which extends the base Sale module. The feature is not available with the Sale module alone.

Quotation templates save time by preconfiguring standard offers.

1. Open **Sales → Configuration → Sales Orders → Quotation Templates**.
2. Click **Create** to define a new template.
3. Give the template a name.
4. Add the products you generally include.
5. Configure the default validity, payment and delivery options.
6. Save the template.

To use a template when creating a quotation:

1. On a new quotation, click **Use Template**.
2. Select the template you want.
3. The quotation is pre-filled with the information of the template.
4. Adapt the detail where needed.

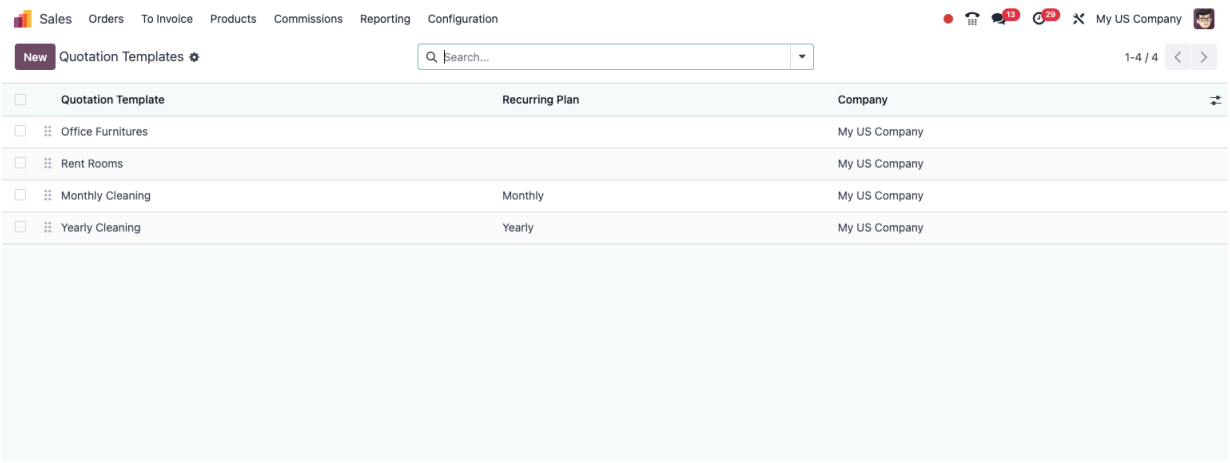


Figure 8.6: Selecting and applying a quotation template

Add optional products to your quotations to offer extras or alternatives:

1. On a quotation, go to the **Optional Products** tab.
2. Click **Add a line** to include an optional product.
3. State the quantity and the price.

When the customer views the quotation online, they can select the options they want to add to their order.

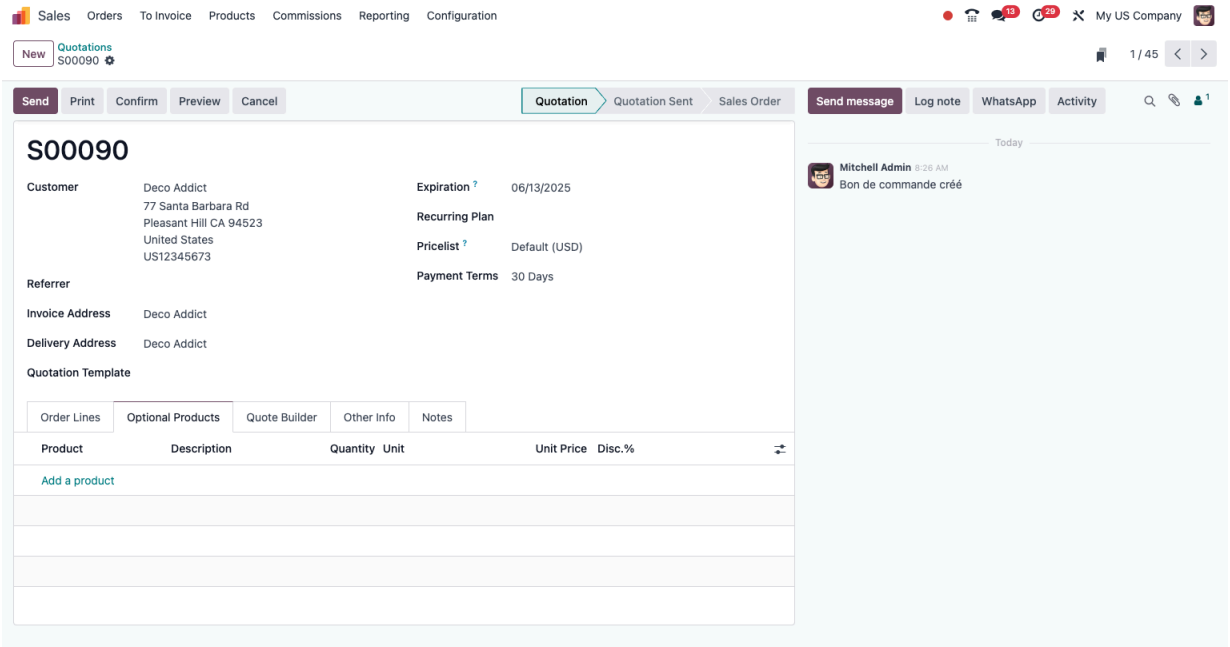


Figure 8.7: Configuring optional products on a quotation

8.4.3 Sending the quotation to the customer

Once the quotation is created, you can send it to the customer:

1. Click the send-by-email button.
2. Check and personalise the message where needed.
3. Click **Send**.

You can also:

- click **Print** to produce a PDF of the quotation;
- use the **Share** option to obtain a link you can send to the customer.

Note

The customer can accept the quotation online, either by signing it electronically or by paying online, when those options are enabled.

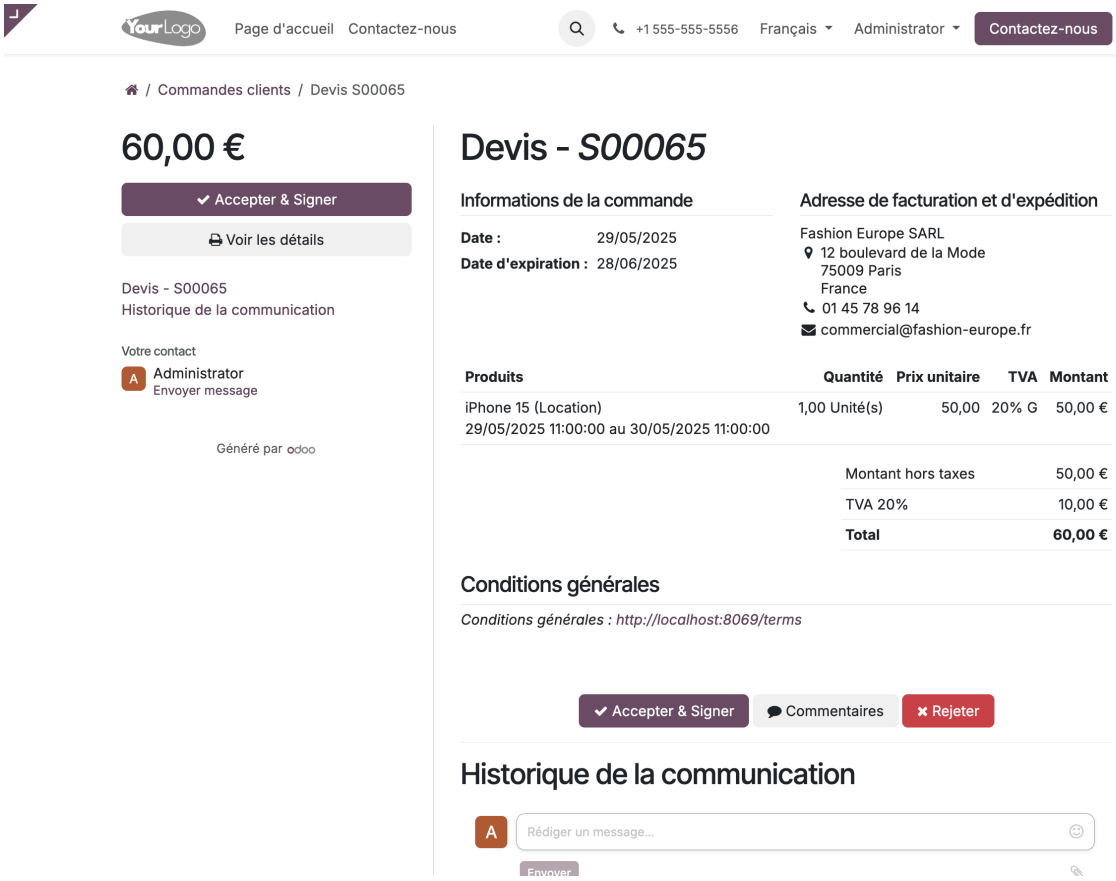


Figure 8.8: The quotation seen in the customer portal

8.5 Sales orders

8.5.1 Converting a quotation into an order

When a customer accepts a quotation, you turn it into a firm order:

1. Open the quotation concerned.
2. Click the **Confirm** button.
3. The quotation becomes an order, and the number changes format.
4. The status moves to **Sales Order**.

If you have enabled online signature or online payment:

1. the customer can confirm the quotation straight from the customer portal;
2. once it is signed or paid, depending on your settings, the quotation is converted into an order automatically;
3. a notification tells you of that conversion.

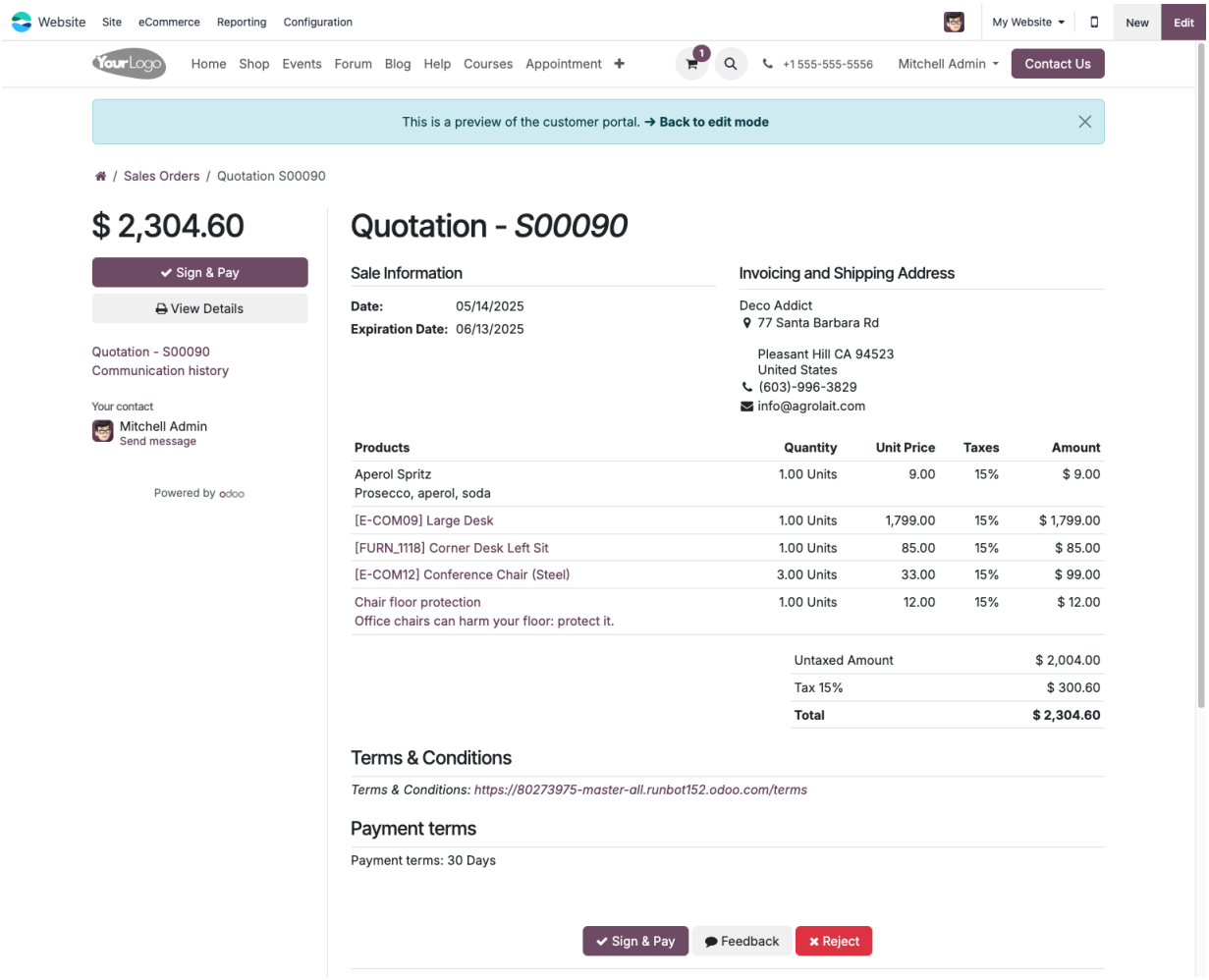


Figure 8.9: A customer accepting a quotation online

8.5.2 Editing an order

Even after confirmation you may sometimes need to change an order:

1. Open the order concerned.
2. Click **Edit**.
3. Make the changes needed.
4. Click **Save**.

Tip

Whether an order can be changed after confirmation depends on how far the delivery and invoicing have progressed. If products have already been delivered or invoiced, some changes may be impossible or may call for extra steps.

8.6 Delivering the products

8.6.1 Creating a delivery order

Once the order is confirmed, Odoo creates a delivery order automatically:

1. On the order, click the **Delivery** smart button.
2. You are taken to the matching delivery order.
3. Check the quantities and the products to deliver.
4. If everything is right, click **Validate** to confirm the delivery.
5. The status of the transfer moves to “Done”.

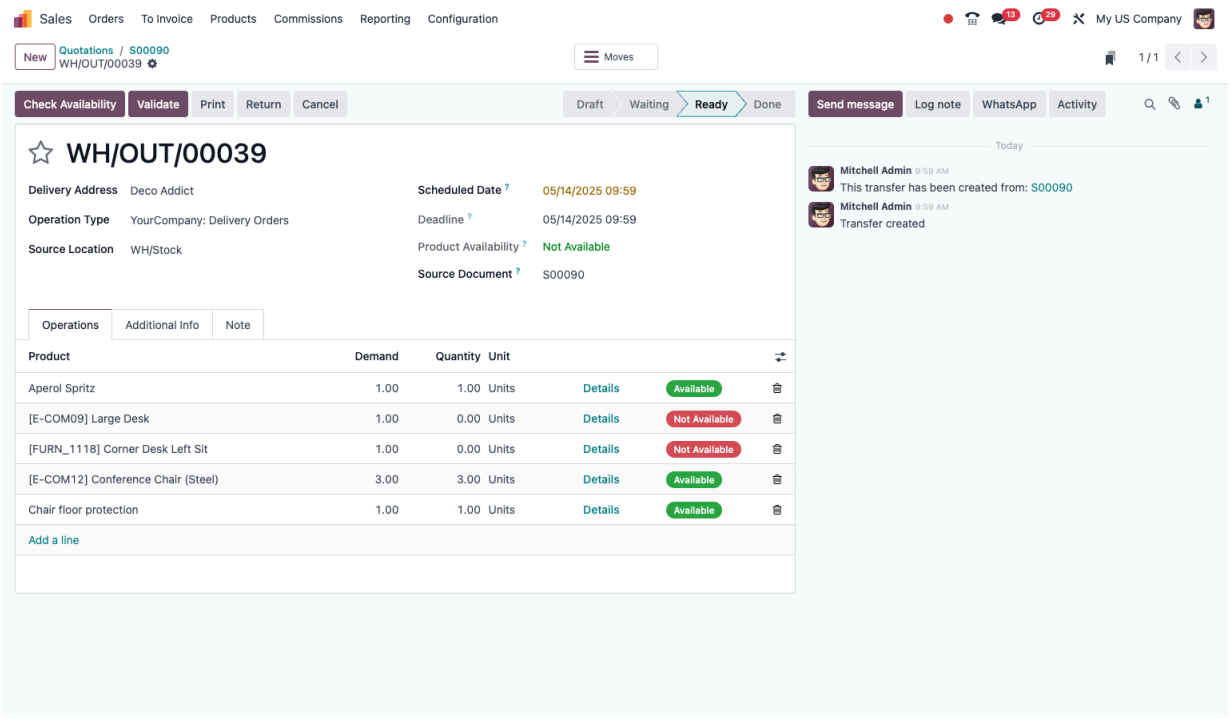


Figure 8.10: Validating a delivery order

If you can deliver only part of the order:

1. On the delivery order, change the **Done** quantities to reflect what you are actually delivering.
2. Click **Validate**.
3. Odoo automatically creates a new delivery order for the quantities outstanding.

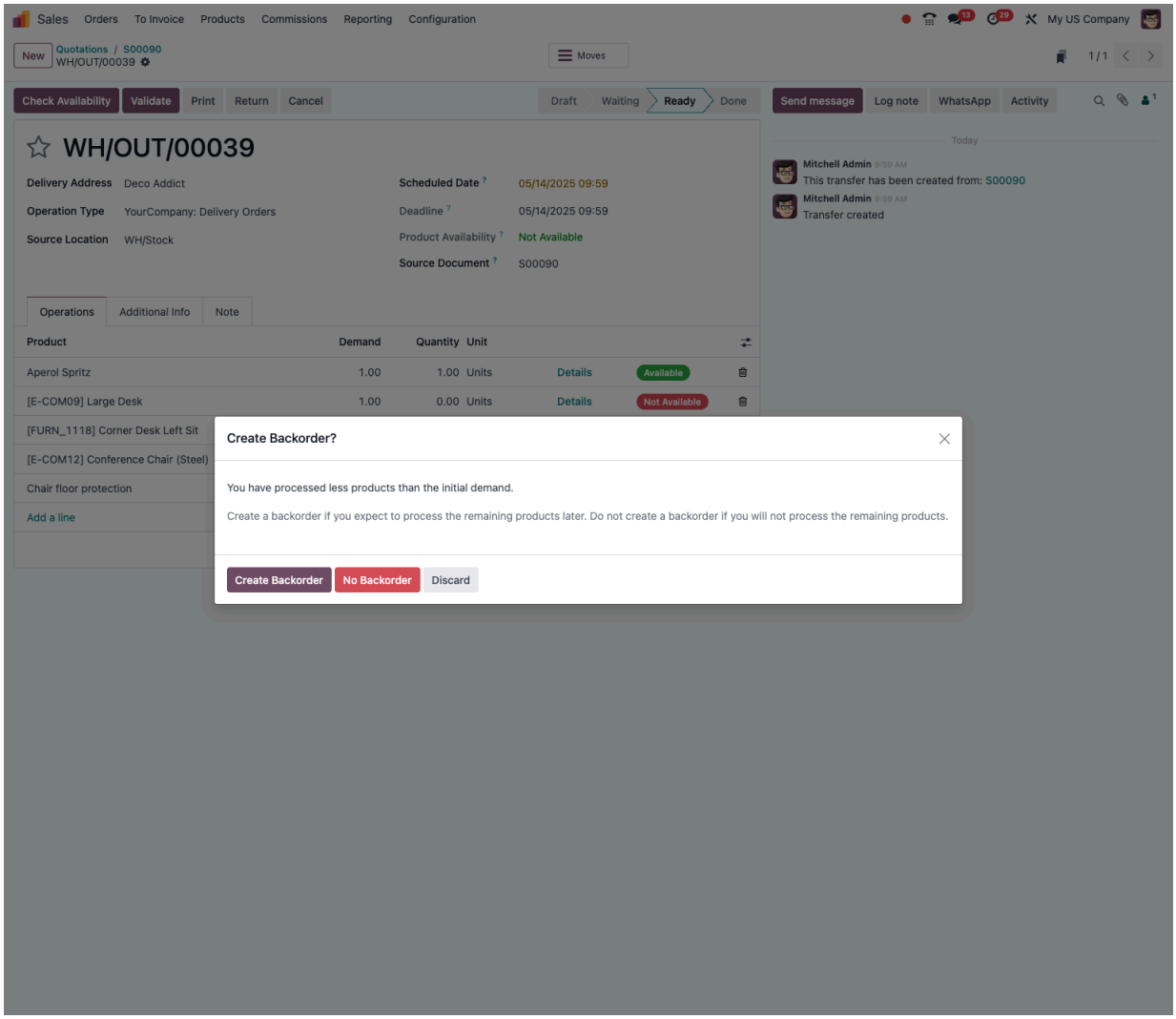


Figure 8.11: Handling a partial delivery

8.6.2 Printing the delivery note

To print the delivery note:

1. On the delivery order, click **Print**.
2. Select **Delivery Slip**.
3. The PDF opens in a new window.
4. Print or save the document as you need.

8.7 Pricing and discounts

8.7.1 Pricelists

To handle different price structures:

1. Open **Sales → Products → Pricelists**.
2. Create the pricelists that suit your market segments:
   - list prices;
   - reseller prices;
   - key account prices;
   - promotional prices.
3. For each list, define:
   - the currency it applies in;
   - the calculation rules;
   - the conditions under which it applies: quantities, period and so on.

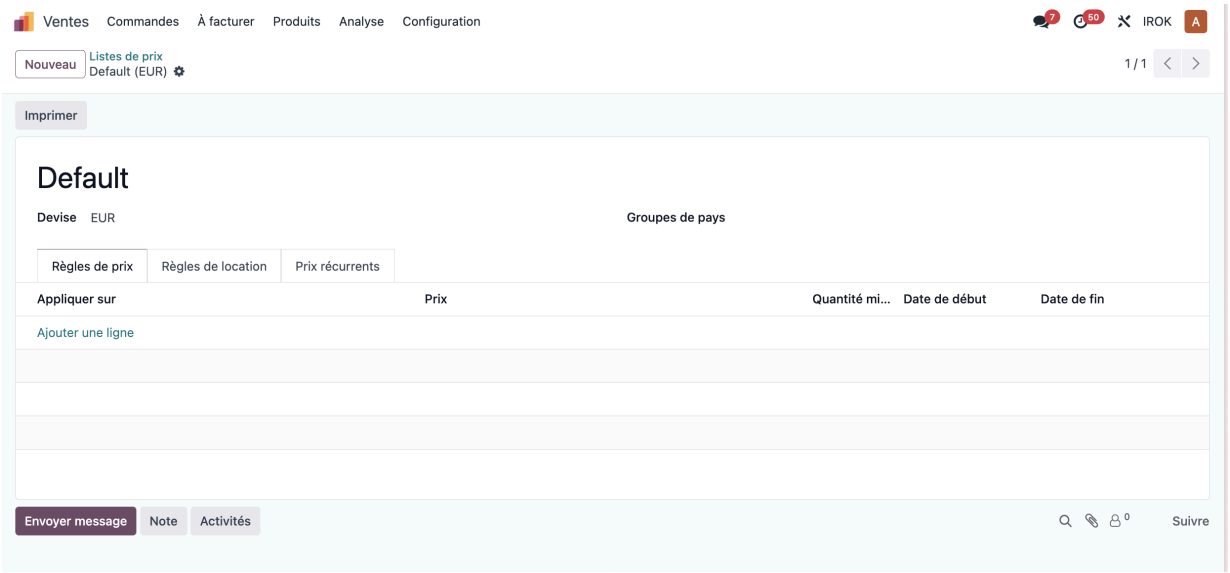


Figure 8.12: Configuring pricelists

8.7.2 Discounts

To apply discounts on your quotations:

1. **Line discount**: enter a percentage directly in the discount column of a product line.
2. **Global discount**: in the “Other Info” tab, apply a discount on the total.
3. **Automatic discounts**: through the pricelists, configure rules based on:
   - the quantities ordered;
   - the total amount of the order;
   - the product category;
   - a specific customer.

Tip

Quantity discounts encourage your customers to increase their order volumes. They are an effective upselling tool.

8.8 Sales analysis

8.8.1 The sales dashboard

Odoo offers a complete dashboard for analysing your sales performance:

1. Open the sales reporting dashboard.
2. See your key indicators: value of quotations, orders, revenue and so on.
3. Use the filters to refine the analysis by period, team, product and so on.

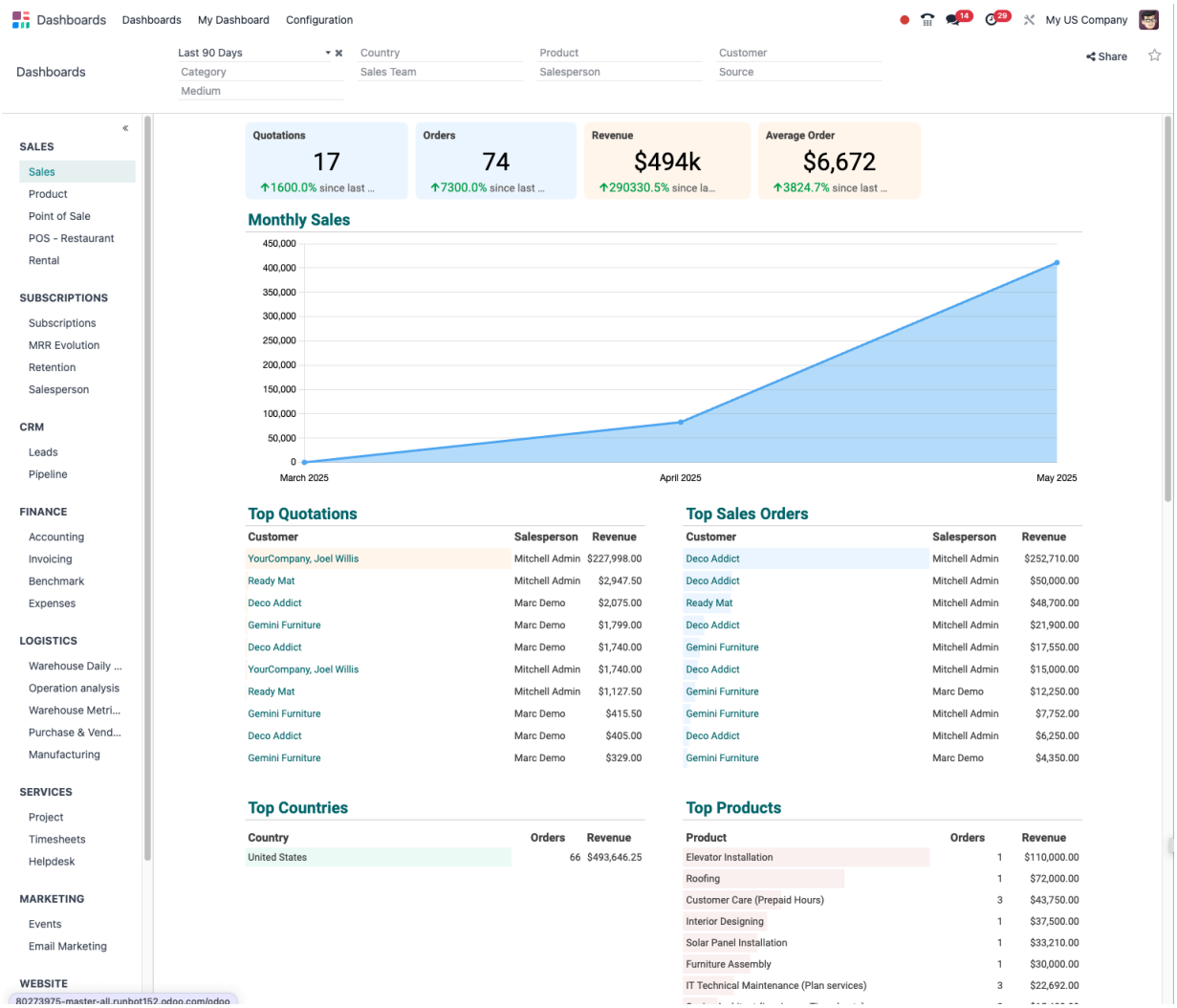


Figure 8.13: The sales dashboard

8.8.2 Detailed reports

For deeper analysis:

1. Open **Sales → Reporting → Sales**.
2. Choose the type of report you want: by customer, product, salesperson and so on.
3. Use the filters and groupings to tailor your analysis.
4. Click **Measures** to select the indicators to display.
5. Export the data to CSV or XLS where needed.

Tip

Use the **Favorites** option to save your custom reports and reach them quickly afterwards.

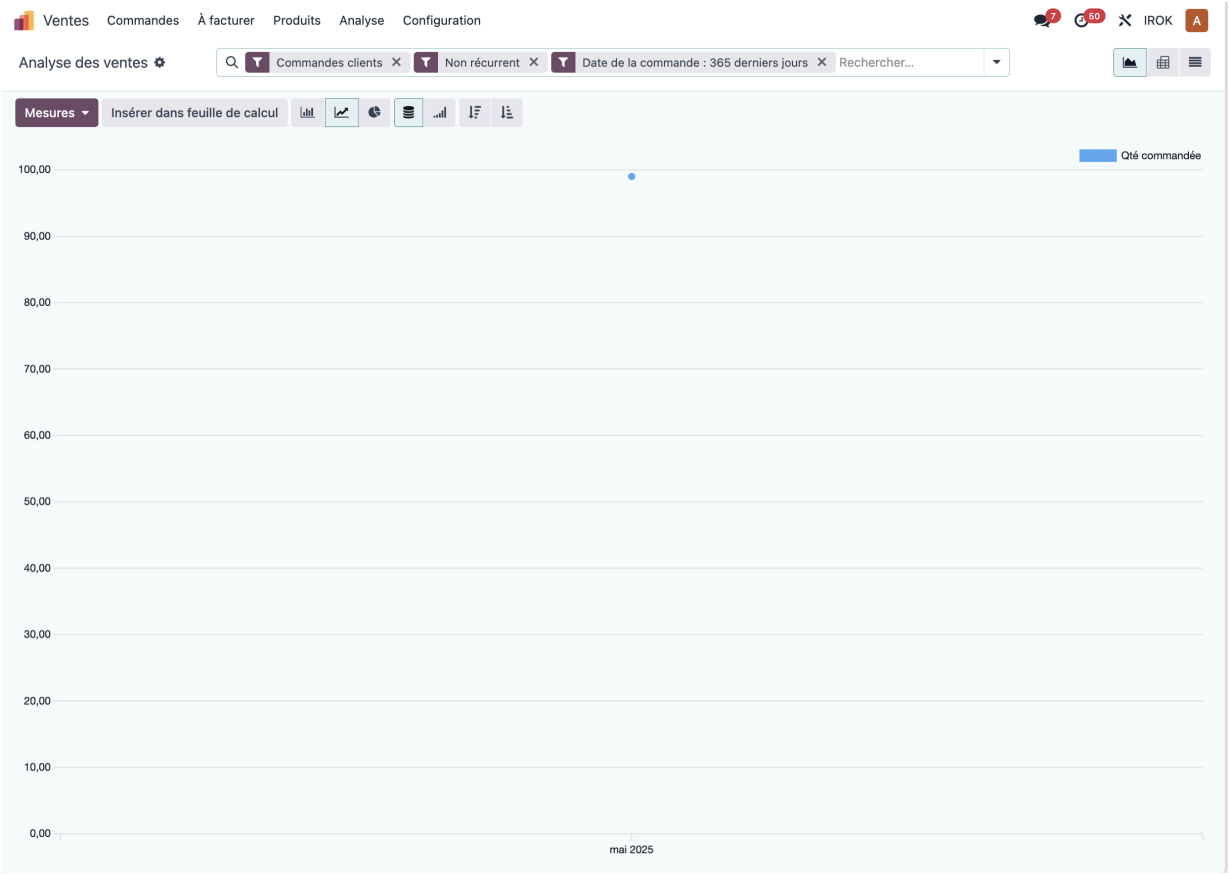


Figure 8.14: Detailed sales analysis

8.9 Handling sales targets

8.9.1 Setting the targets

To steer the performance of your teams:

1. Open the sales configuration and create a target, stating:
   - the period concerned;
   - the team or the salesperson targeted;
   - the amount or the number of sales to reach;
   - the type of target: revenue, margin, new customers and so on.
2. Follow progress on the sales dashboard.

Note

Setting clear and reachable targets is a powerful motivator for your sales teams.

8.10 Recurring sales and subscriptions

Note

The subscriptions feature requires the optional “Subscriptions” module, which is not part of the base Odoo installation. It is generally available in the Enterprise edition or as an additional module.

8.10.1 Configuring subscriptions

To handle contracts and recurring sales:

1. Open the Subscriptions application.
2. Create a new subscription template:
   - define the products or services included;

- configure the periodicity: monthly, quarterly, yearly;
- state the renewal terms;
- set up automatic invoicing.

3. Apply that template to your customers.

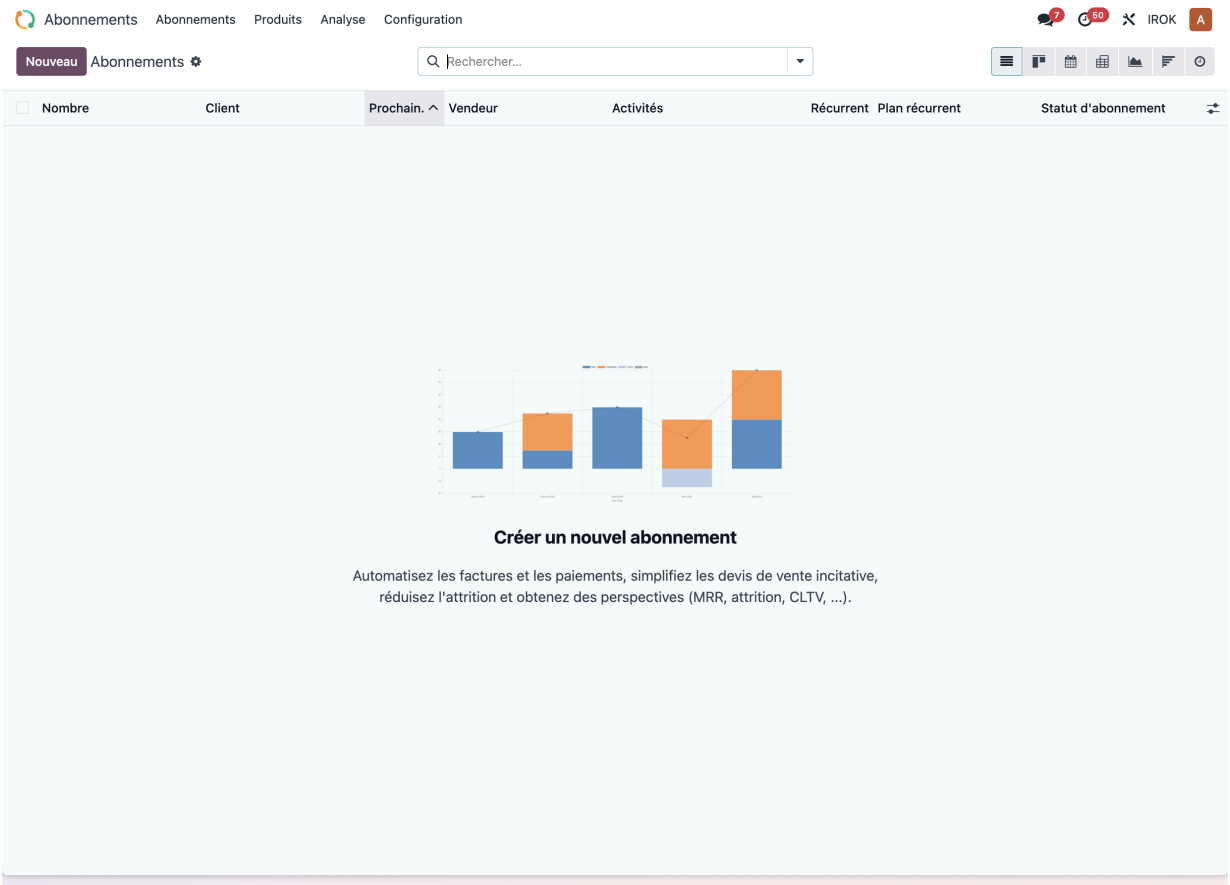


Figure 8.15: Handling subscriptions and recurring sales

Tip

Recurring sales make your revenue more predictable and strengthen customer loyalty.

8.11 A complete process, end to end

8.11.1 A worked case: from quotation to delivery

Here is a concrete example illustrating the whole sales process in Odoo:

1. **Creating the quotation:**
   - company ABC asks for a quotation for 10 units of product X and 5 units of product Y;
   - a quotation is created with the products requested;
   - a commercial discount of 5% is applied to the total;
   - the quotation is emailed to the customer.
2. **Confirming the order:**
   - the customer approves the quotation through the customer portal;
   - the quotation becomes an order;
   - a delivery order is created automatically.
3. **Delivery:**
   - the products are prepared in the warehouse;
   - the delivery order is validated;
   - the delivery note is printed to go with the goods.

8.12 First steps for a new salesperson

8.12.1 A salesperson's daily guide

A recommended daily routine:

1. **8:30**: look at the sales dashboard.
2. **9:00**: check the activities planned for the day.
3. **9:30**: follow up the quotations awaiting an answer.
4. **10:30**: check the newly qualified opportunities.
5. **11:30**: draw up quotations for the urgent requests.
6. **14:00**: make your planned calls and hold your meetings.
7. **16:00**: check the state of the deliveries under way.
8. **17:00**: plan your activities for the next day.
9. **17:30**: update your opportunities and your forecasts.

8.12.2 The five essential shortcuts

Shortcut	Action
`Alt` + `N`	Create a new quotation quickly
`Alt` + `S`	Save your work in progress
`Ctrl` + `K`	Global search, to find a customer quickly
`Alt` + `E`	Display the archived records, such as former customers
`Alt` + `Shift` + `M`	Open the Action menu for the advanced options

Note

On a Mac, press `Control` on any Odoo screen to see every keyboard shortcut available in the current context.

8.13 Tips and good practice

8.13.1 Improving the sales process

Good practice for quotations:

- create quotation templates for your most common offers;
- use optional products to raise your average order value;
- set an expiration date to prompt the customer to decide;
- personalise your quotation emails to make them more compelling;
- follow the state of your outstanding quotations regularly.

Improving deliveries:

- check product availability before confirming an order;
- use partial deliveries for the products available;
- communicate with customers proactively when there is a delay;
- automate the shipping notifications.

Maximising your sales:

- analyse your conversion rates by product and by customer regularly;
- identify inactive customers and set up follow-up actions;
- use the reports to identify the products with the most potential;
- create targeted promotions on slow-moving products;
- set up alerts for regular customers who have not ordered for some time.

8.13.2 Solving common problems

The order is locked and cannot be changed.

1. Check whether a delivery or an invoice already exists for that order.
2. If so, you will have to cancel those documents first.
3. For deliveries: go back to the delivery order and click **Cancel**.
4. For invoices: create a credit note to reverse the existing invoice.
5. Once those documents are cancelled, you can change the order.

The price displayed does not match the pricelist.

1. Check the pricelist applied to the customer on their record.
2. Check the active discounts or promotions that might affect the price.
3. Check whether specific pricing rules apply: quantity, date and so on.
4. Make sure the currency used is the right one.

Note

In Odoo, almost every problem has a logical explanation. In case of doubt, consult the message history attached to the order or to the document concerned, which often holds clues about what was done earlier.

CHAPTER 9

Invoicing

Relation with the exercise book

This chapter gives you the concepts you need to handle your customer and vendor invoices effectively, and to follow the payments.

9.1 Introduction to invoicing in Odoo

Odoo's Invoicing module (also called Accounting) handles all the financial flows tied to sales and purchases. It creates the invoices, follows the payments and makes bank reconciliation easier, all while preparing the data for the accounts.

Note

Even if you do not use Odoo for full accounting, the Invoicing module remains essential for the commercial and financial follow-up of your business.

9.2 Configuring the Invoicing module

9.2.1 Basic settings

To configure the module to suit your needs:

1. Open **Accounting → Configuration → Settings**.
2. Configure the main options:
   - **Chart of Accounts**: select the one matching your country.
   - **Main Currency**: the reference currency for your accounts.
   - **Fiscal periods**: the definition of the financial year.
   - **Taxes**: configuring the various VAT rates.
3. Advanced options, as you need them:
   - **Multiple currencies**: to invoice in different currencies.
   - **Credit note handling**: for refunds and corrections.
   - **Analytic Accounting**: to allocate expenses and revenue.
4. Click **Save** to apply the settings.

9.2.2 Configuring the journals

Journals are the entry points for recording transactions:

1. Open **Accounting → Configuration → Accounting → Journals**.
2. Check the predefined journals:
   - the sales journal;
   - the purchase journal;
   - the bank journal;
   - the cash journal;
   - the miscellaneous operations journal.
3. Tailor the numbering sequences to your organisation.

Tip

You can create several sales journals to separate your activities, sales of goods on one side and services on the other for instance.

9.2.3 Configuring the payment terms

Define the standard payment terms for your customers and vendors:

1. Open **Accounting** → **Configuration** → **Invoicing** → **Payment Terms**.
2. Create or edit the terms to match your practice:
   - immediate;
   - 15 days;
   - 30 days end of month;
   - 45 days end of month;
   - and so on.
3. Those terms are then offered automatically when invoices are created.

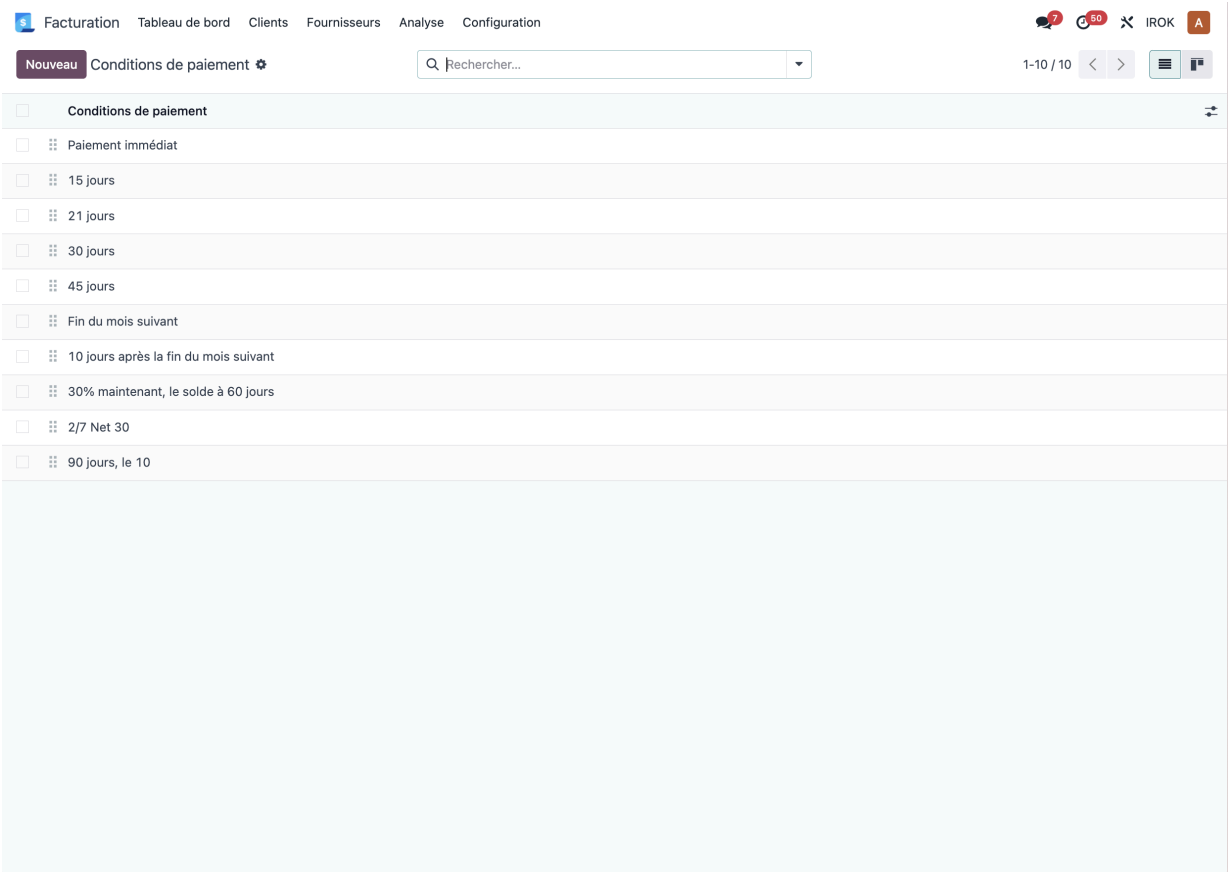


Figure 9.1: Configuring the payment terms

9.2.4 Configuring Peppol electronic invoicing

Peppol is an international standardised network for transmitting invoices electronically:

1. Open **Accounting** → **Configuration** → **Settings**.
2. Enable electronic invoicing through Peppol.
3. Follow the instructions to configure your Peppol access point.

Note

Electronic invoicing through Peppol is becoming mandatory in many European countries. In France it is being rolled out in stages between 2024 and 2026 according to the size of the business. Peppol allows electronic invoices to be exchanged securely between businesses, whatever accounting software they use. The standardised format speeds up processing and improves tax compliance.

9.3 Customer invoicing

9.3.1 Creating an invoice

To create a customer invoice by hand:

1. Open **Accounting** → **Customers** → **Invoices**.
2. Click **Create**.
3. Fill in the main information:
   - select the customer;
   - set the invoice date;
   - choose the payment terms;
   - add the product or service lines;
   - check the taxes applied.
4. Click **Save** to create a draft.
5. Check the document, then click **Validate** to confirm the invoice.

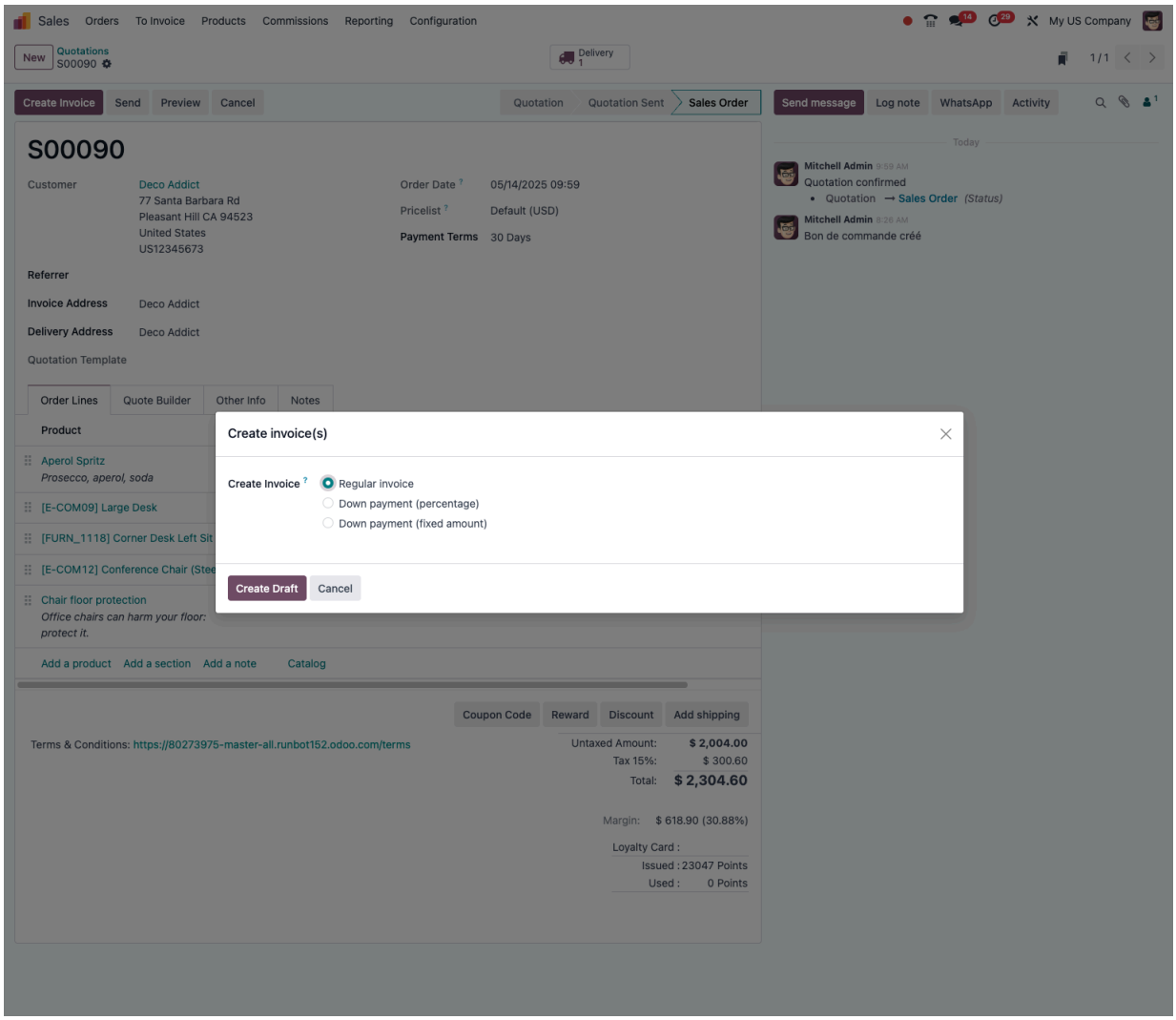


Figure 9.2: The customer invoice creation form

9.3.2 Invoicing from a sales order

To invoice an existing sales order:

1. Open the sales order concerned in the Sales module.
2. Click the **Create Invoice** button.
3. Choose the invoicing mode:
   - **Regular invoice**: invoicing the whole order;

- **Down payment**: partial invoicing, as a percentage or a fixed amount;
- **Delivered quantities**: invoicing based on the products already delivered.

4. Check the information and adjust it where needed.
5. Click **Create Invoice** then **Validate**.

Note

When you invoice from a sales order, the lines are linked automatically, which makes it easier to follow partial invoicing and the overall status of the order.

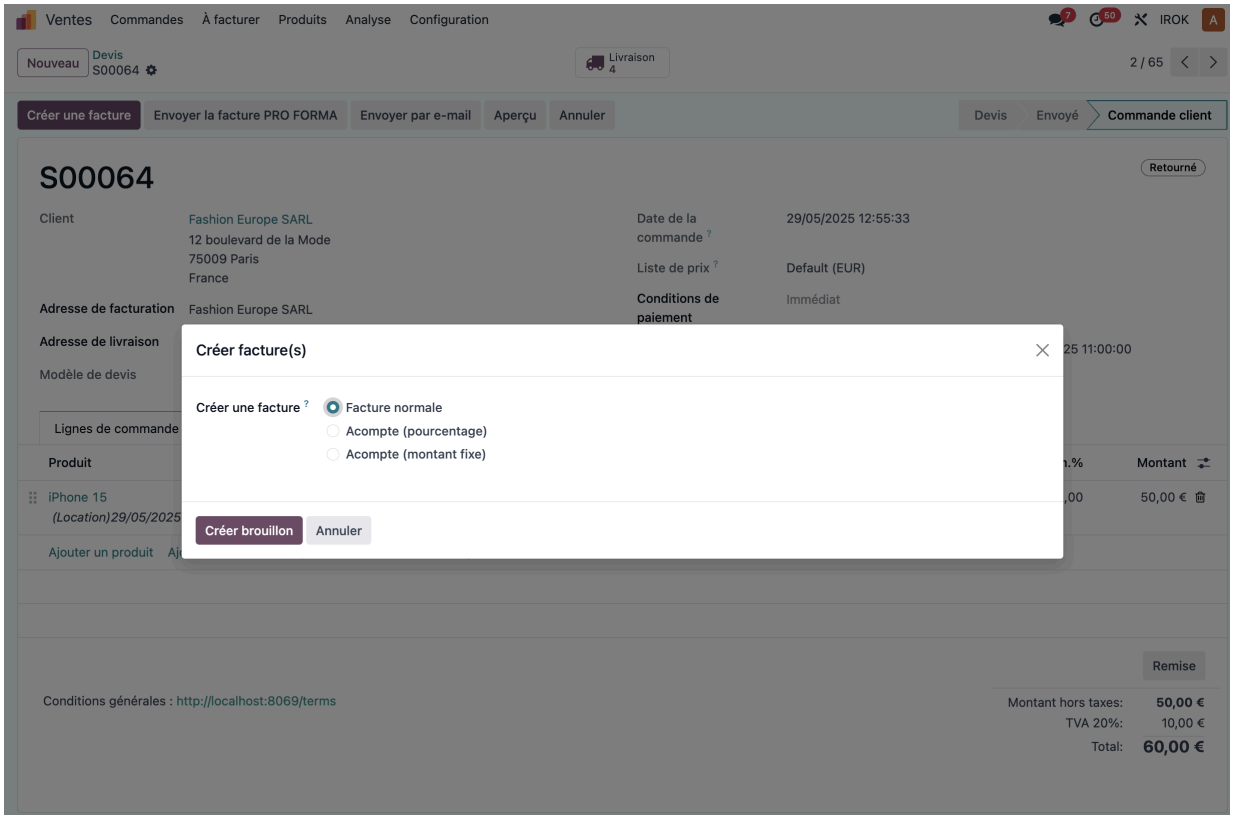


Figure 9.3: Creating an invoice from a sales order

9.3.3 Grouped invoicing

To invoice several orders from the same customer on a single invoice:

1. Open the orders to invoice in the Sales module.
2. Select several orders from the same customer.
3. Click **Action** then **Create Invoices**.
4. Configure the grouping options:
   - by order, giving one invoice per order;
   - by customer, giving a single invoice gathering every order.
5. Confirm to create the invoice or invoices.

Tip

Grouped invoicing is particularly useful for regular customers placing many small orders. It reduces the number of invoices to handle and simplifies payment follow-up.

9.3.4 Recurring invoicing

To automate the invoicing of recurring services:

Note

> In Odoo, recurring invoicing uses the auto-post mechanism rather than separate “recurring invoice templates”. The feature is configured directly on the draft invoices.

1. Create a draft invoice for the recurring service.
2. On the invoice, configure the auto-post settings:
   - the frequency: monthly, quarterly, yearly;
   - the date of the next generation;
   - the end date, optionally.
3. Validate the initial invoice.
4. The system then creates the following invoices automatically at the periodicity defined.

9.4 Handling customer payments

9.4.1 Recording a payment

To record the payment of an invoice:

1. Open the invoice concerned.
2. Click the **Register a payment** button.
3. Fill in the details of the payment:
   - the amount, the outstanding balance by default;
   - the date of the payment;
   - the journal: bank, cash and so on;
   - the payment method: cheque, transfer, card and so on;
   - the payment reference, such as a cheque number.
4. Click **Validate** to confirm the payment.
5. The invoice moves to the “Paid” status.

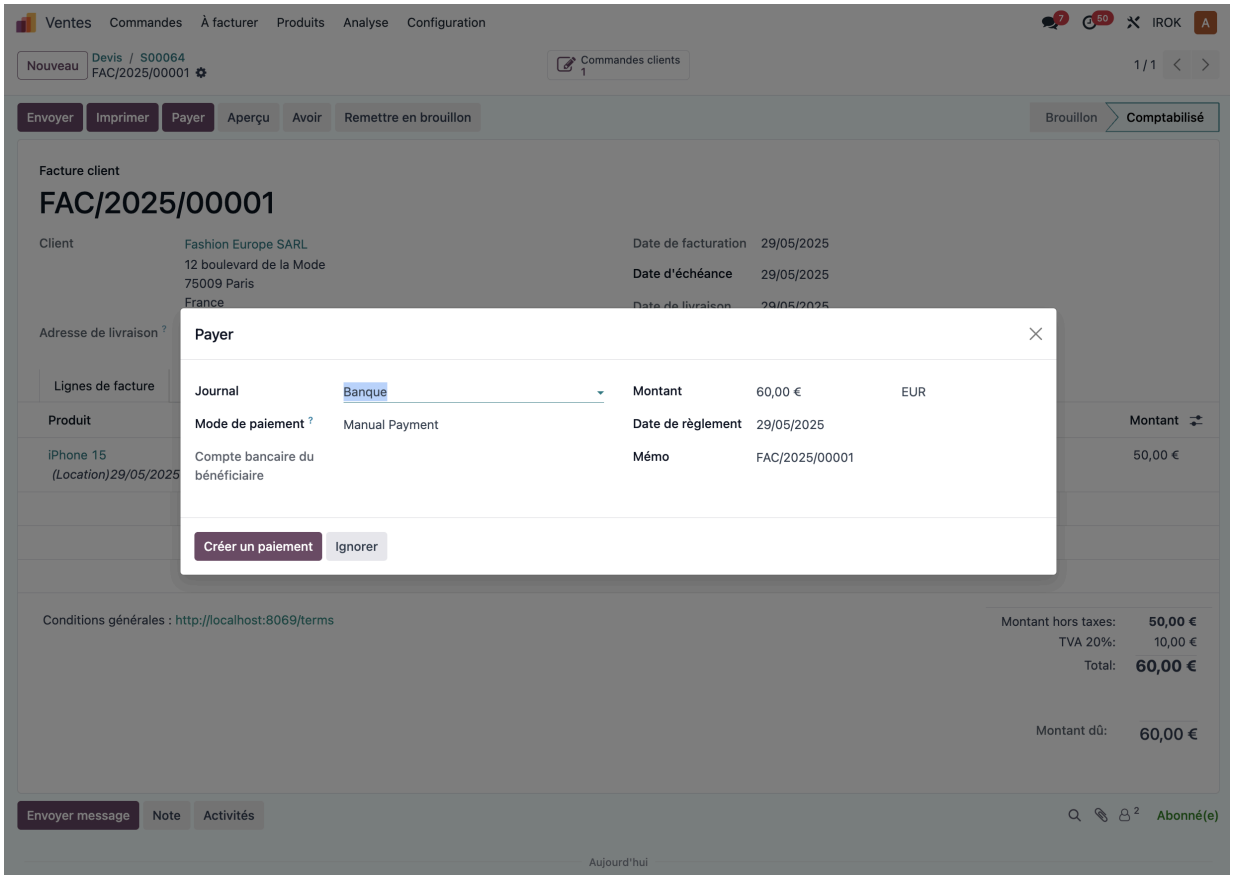


Figure 9.4: Recording the payment of a customer invoice

9.4.2 Partial payments

To record a down payment or a partial payment:

1. Follow the same procedure as for a full payment.
2. Change the amount to the sum actually received.
3. Confirm the payment.
4. The invoice moves to the “Partially paid” status.
5. An outstanding balance appears on the invoice.

Tip

You can record as many partial payments as needed until the invoice is settled in full.

9.4.3 Grouped payments

To handle several customer payments in a single operation:

1. Open **Accounting** → **Customers** → **Payments**.
2. Click **Create**.
3. Select the customer concerned.
4. Odoo displays every open invoice of that customer.
5. Fill in the amounts paid against each invoice.
6. Complete the payment information: method, date, reference.
7. Confirm the grouped payment.

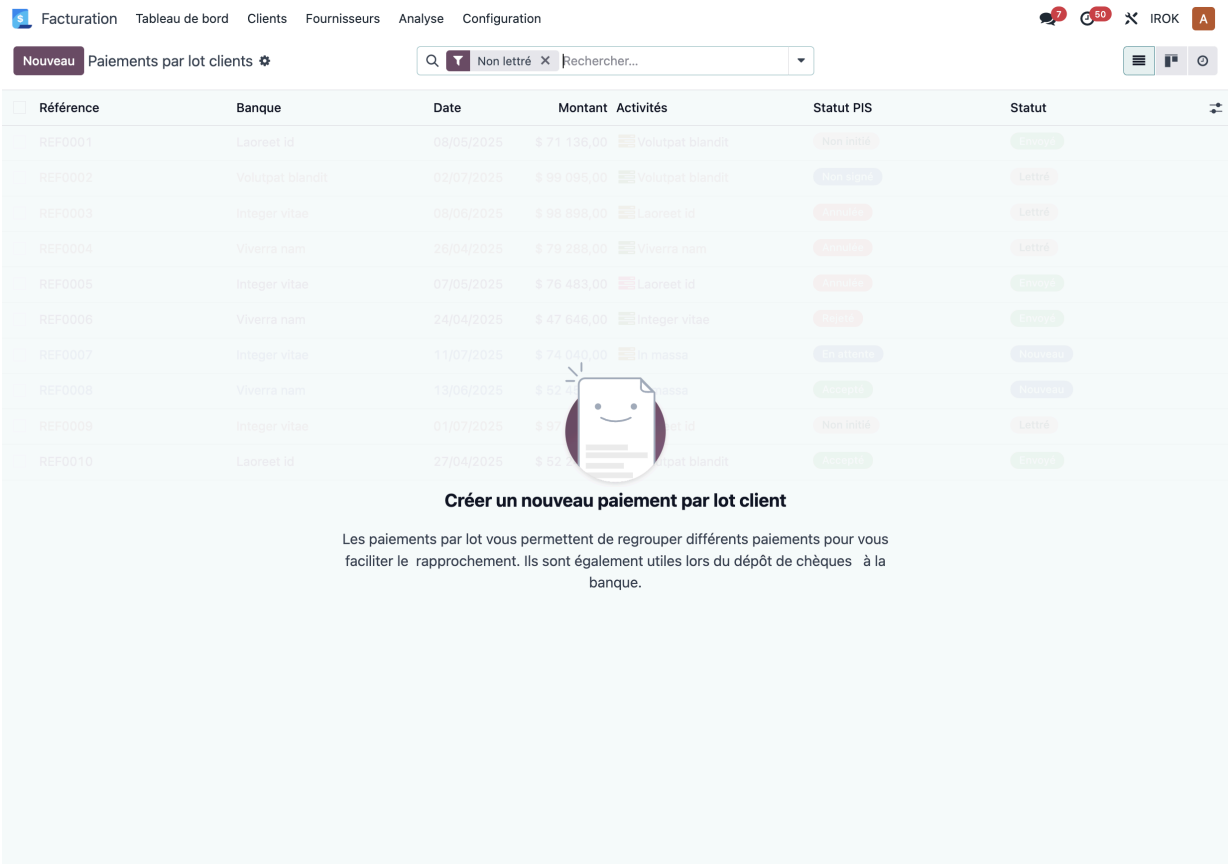


Figure 9.5: Handling grouped payments

9.5 Handling vendor bills

9.5.1 Entering vendor bills

To record a vendor bill:

1. Open **Accounting** → **Vendors** → **Bills**.

2. Click **Create**.
3. Select the vendor.
4. Fill in the vendor's reference, that is their own invoice number.
5. State the bill date.
6. Add the lines matching the products or services bought.
7. Check the taxes and the accounts.
8. Save, then validate the bill.

9.5.2 Vendor bills from purchase orders

To create a bill from a purchase order:

1. Open the purchase order concerned.
2. Click **Create Invoice**.
3. Choose the invoicing method:
   - on ordered quantities: invoicing the whole order;
   - on received quantities: only the products already received.
4. Check the information carried over from the order.
5. Add the vendor's reference.
6. Validate the bill.

Note

When a vendor bill arrives, always compare the prices and quantities with the matching purchase order, to catch any difference.

9.5.3 Paying vendor bills

To record the payment of a vendor bill:

1. Open the bill concerned.
2. Click **Register a payment**.
3. Fill in the details of the payment:
   - the amount;
   - the journal, that is the bank;
   - the date;
   - the payment method;
   - the reference, such as a transfer number.
4. Confirm the payment.

9.6 Credit notes and refunds

9.6.1 Creating a customer credit note

To handle a product return or to grant a reduction after invoicing:

1. Open the invoice concerned.
2. Click the **Credit Note** button.
3. In the **Credit Note** window, fill in the reason shown on the credit note.
4. Update the journal and the reversal date where needed.
5. Choose one of the two options:
   - **Reverse**: creates a draft credit note with the details of the original invoice, which allows partial changes;
   - **Reverse and Create Invoice**: creates the credit note, validates it, reconciles it against the invoice and opens a new invoice.
6. Confirm the credit note if you chose the first option.

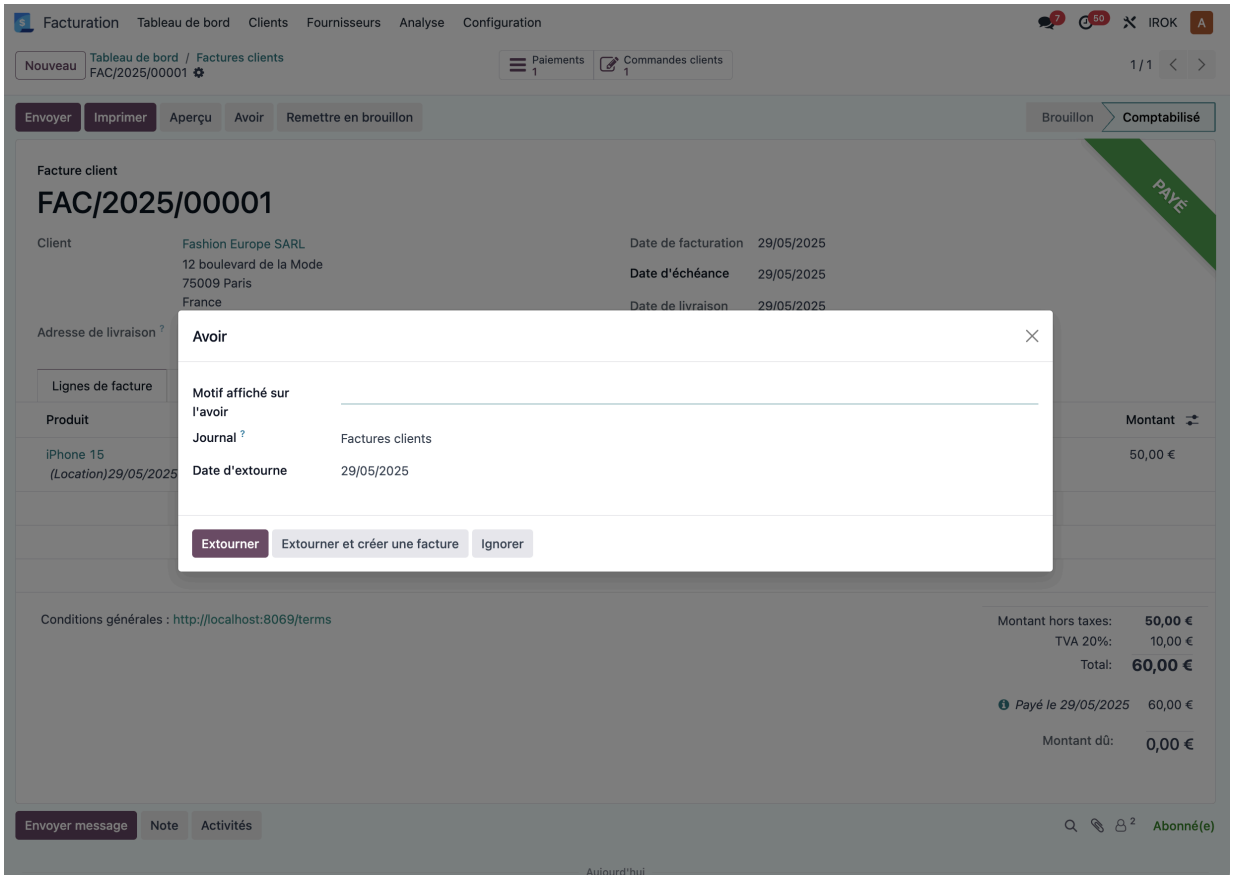


Figure 9.6: Creating a customer credit note

9.6.2 Refunding a customer

To refund a customer:

1. If you created a credit note to keep as such:
   - open the credit note concerned;
   - click **Register a payment**
   - select the refund option;
   - complete the refund information;
   - confirm the operation.
2. The status of the credit note moves to “Paid”.

Tip

You can also use a credit note to offset future invoices from the same customer, with no refund made. That is often preferable for keeping the customer’s loyalty.

9.7 Follow-up and chasing

9.7.1 Following unpaid invoices

To handle customer exposure effectively:

1. Open **Accounting → Customers → Invoices**.
2. Apply the **Unpaid** filter to see only the unpaid invoices.
3. See every invoice awaiting settlement.
4. Filter by:
   - due date;
   - customer;
   - amount;

  - age.
5. Export the list where an outside tool is needed.

9.7.2 Automatic chasing

Note

Automatic chasing requires the “Account Followup” module, which is available in Odoo Enterprise only. The feature is not part of the Community edition.

To automate payment reminders:

1. Open the follow-up configuration in Accounting, available in Odoo Enterprise only.
2. Configure several levels of chasing:
   - level 1: a polite reminder, 7 days after the due date;
   - level 2: a firm chase, 14 days after the due date;
   - level 3: a formal notice, 30 days after the due date.
3. For each level, tailor:
   - the text of the message;
   - the trigger delay;
   - the way it is sent: email, letter.
4. Enable automatic chasing in the settings.

Note

A well-configured chasing system improves your payment times significantly and reduces your working capital requirement.

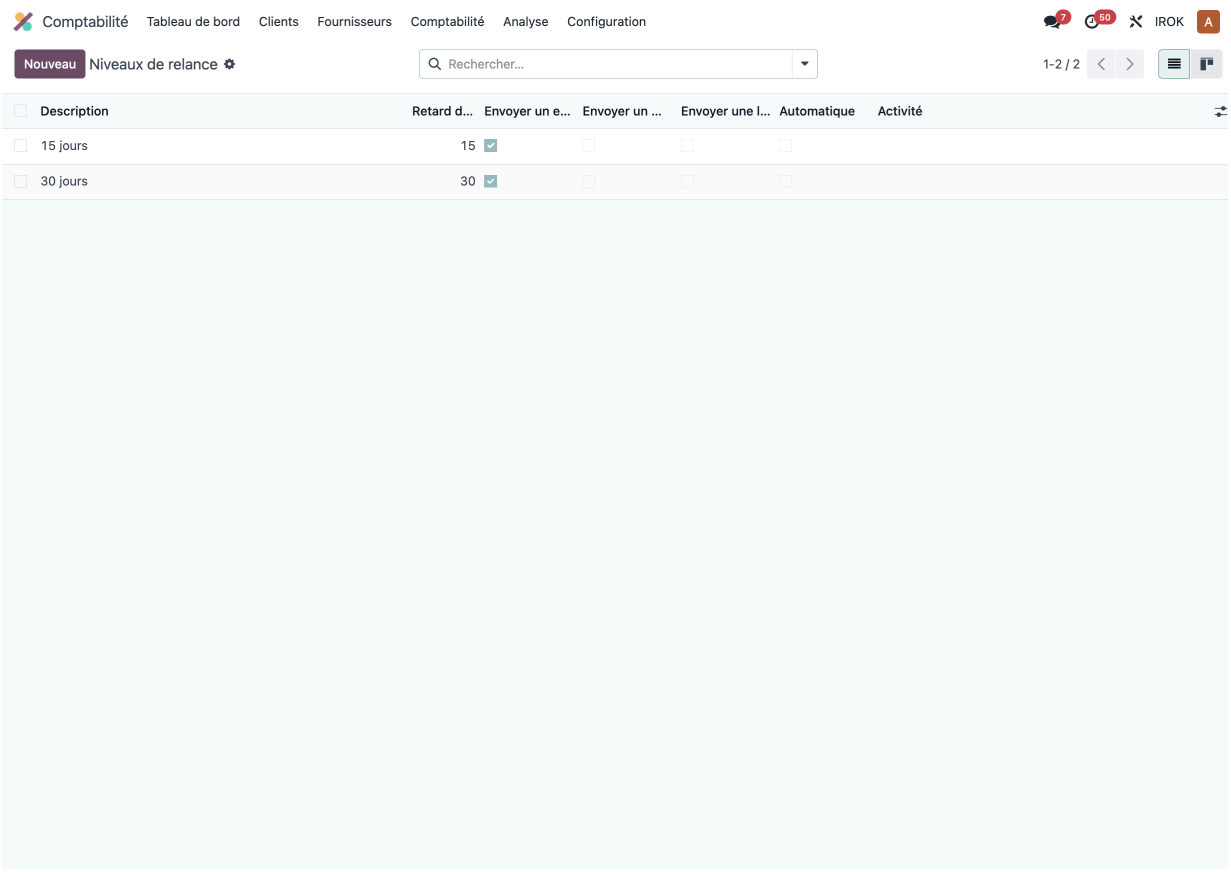


Figure 9.7: Configuring the customer follow-up levels

9.8 Financial reports

9.8.1 Invoicing reports

Odoo offers several standard reports for following your invoicing:

1. **Sales journal**: a chronological list of the invoices issued.
2. **Purchase journal**: a chronological list of the bills received.
3. **Aged Receivable**: a forecast of the receipts to come.
4. **Aged Payable**: a forecast of the payments to come.
5. **Turnover analysis**: a breakdown by product, customer and so on.

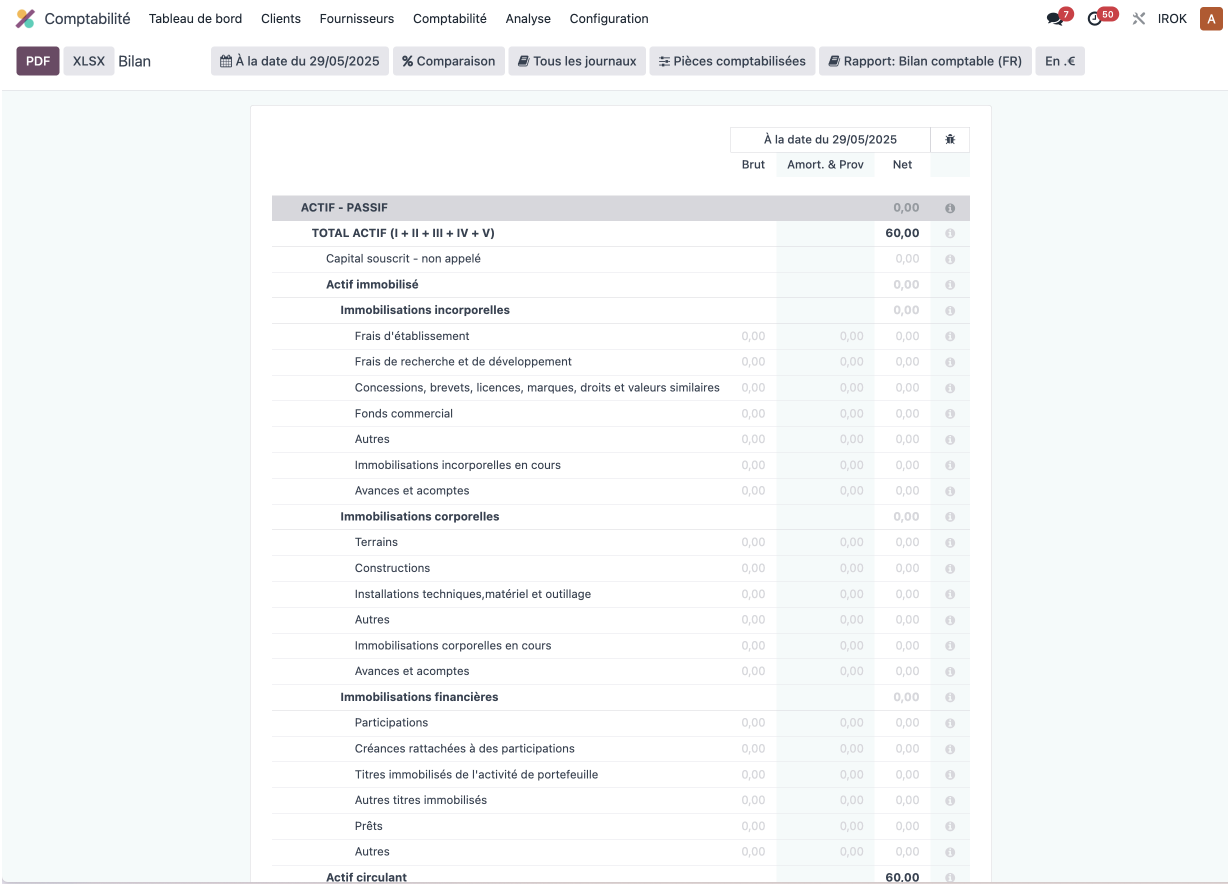


Figure 9.8: Examples of the financial reports available

9.8.2 Custom dashboards

To build summary views suited to your needs:

Note

Odoo's main dashboard is reached from the Accounting application. It automatically displays summary information on your journals and financial indicators. Advanced dashboard customisation generally calls for specific development or for outside reporting tools.

1. Open the Accounting dashboard to see the predefined indicators.
2. Look at the widgets available:
   - a summary of the journals with their current balances;
   - invoices awaiting payment;
   - payments to process;
   - planned activities.
3. Use the analysis reports for more detailed views.
4. For advanced dashboards, look at the Odoo App Store for specialised modules.

Tip

Build dashboards for different users: a cash-oriented one for the finance director, a sales-oriented one for the sales director, and so on.

9.9 Tax and filings

9.9.1 Handling VAT

Note

Modules required: automated tax filings require the Enterprise modules "Account Reports" (`account_reports`) and "French Reports" (`l10n_fr_reports`). Those features considerably extend the base capabilities of Odoo Community.

With the Enterprise modules installed, to follow and file VAT:

1. Open **Accounting → Reporting → Statement Reports → Tax Return**.
2. Select the period concerned.
3. Consult the VAT report, which automatically details:
   - VAT collected on sales, with French rounding;
   - deductible VAT on purchases;
   - the net balance payable to the tax authority.
4. Use the closing entry button to generate the tax entry.
5. Use the electronic filing button to send the return to the French tax authority.
6. Export to PDF or download to Excel for your records.

9.9.2 Advanced Enterprise features

The Enterprise modules add specialised features:

1. **Automatic tax closing**: the closing entries are generated automatically.
2. **Rounding compliant with French regulations**: the official rounding rules are applied.
3. **Electronic data interchange**: direct transmission to bodies such as the French tax authority.
4. **Audit trail**: full traceability of the returns submitted.
5. **Multi-company handling**: consolidation of the returns for groups of companies.

9.9.3 The alternative in Odoo Community

Without the Enterprise modules, VAT handling comes down to:

1. **Configuring the taxes**: from the accounting configuration.
2. **Consulting the entries**: from the journal items.
3. **Manual export**: preparing the returns by hand through a CSV or Excel export.
4. **Manual computation**: aggregating the amounts for the official returns.

Tip

Always check that your taxes are correctly configured on the products and services, to avoid errors in your returns, whether you use Community or Enterprise.

9.9.4 Closing a period

At the end of each accounting period:

1. Make sure every invoice of the period is entered.
2. Check that every payment is correctly recorded.
3. To lock a period, open **Settings → Users & Companies → Companies**.
4. Open your company and set the lock dates:
   - **Sales lock date**: prevents customer invoices being changed before that date.

   - **Accounting lock date**: prevents any accounting change before that date.
5. Save the changes to apply the lock.

Note

In Odoo there is no “close a period” function in the traditional sense. The system uses lock dates, which prevent changes before a given date, while the entries stay readable.

9.10 Integration with accounting

9.10.1 Transferring to outside accounting software

Note

Exporting the accounting entries calls for country-specific modules. For France, the `l10n_fr_fec` module (Enterprise) produces the mandatory FEC format. Other export formats may need additional modules or specific development.

If you use outside accounting software alongside Odoo:

1. **Manual export from the data views:**
   - open the journal items in Accounting;
   - use the filters to select the period you want;
   - export to Excel or CSV from the **Action** menu.
2. **FEC export (France only, Enterprise module):**
   - requires the `l10n_fr_fec` module;
   - reached from the French reports in Accounting.
3. **Other export formats:**
   - specific development depending on the target accounting software;
   - third-party modules available on the Odoo App Store.

Note

For the integration to work smoothly, check that your chart of accounts in Odoo matches exactly the one used in your outside accounting software.

9.11 Good practice and advice

9.11.1 Organising effectively

Advice for running invoicing well:

- **Invoice regularly**: do not wait to invoice your customers, set a fixed schedule.
- **Digitisation**: systematically scan and attach vendor bills to your records.
- **Checking**: check vendor bills against the purchase orders and the receipts.
- **Following due dates**: look daily at the invoices coming due.
- **Grouped payments**: group your vendor payments by date to manage cash better.
- **Documentation**: always note the reason for credit notes and refunds.

Improving the invoicing process:

- **Automation**: use recurring invoicing for regular services.
- **Checking first**: check product availability before confirming a sale.
- **Consolidation**: invoice customers with several orders in one go.
- **Online payment**: enable online payments to speed up your receipts.
- **Systematic chasing**: automate the reminders to shorten payment times.

9.11.2 Solving common problems

The invoice is in the wrong state.

1. Check the current status of the invoice.
2. For a draft invoice, click **Validate** to confirm it.
3. To cancel a validated invoice, create a credit note.
4. If an invoice reads “Partially paid” but should read “Paid”, check the payment amounts.
5. For more complex problems, consult the message history attached to the invoice.

The taxes are wrong on the invoice.

1. Check the customer’s fiscal position: domestic, intra-community, export and so on.
2. Check the tax configuration of the products concerned.
3. If the invoice is still a draft, change the taxes directly.
4. If the invoice is already validated, create a credit note and then a correct new invoice.

Note

Most invoicing errors can be corrected in Odoo. To preserve the integrity of the accounts, however, those corrections must always go through official documents (credit notes, new invoices) rather than through direct changes.

9.12 A complete worked example

9.12.1 A use case: the full invoicing cycle

Here is a complete flow in Odoo, from sale to payment:

1. **Creating the sale:**
   - company ABC orders 20 units of product X at 100 € each;
   - a quotation is created and then confirmed into an order.
2. **Delivery:**
   - the products are delivered to the customer on a delivery order;
   - the delivery is validated in the system.
3. **Invoicing:**
   - an invoice is generated from the order;
   - the invoice is validated for 2,000 € excluding tax (2,400 € including tax);
   - it is emailed to the customer automatically.
4. **Payment:**
   - fifteen days later, the customer makes a transfer of 2,400 €;
   - the payment is recorded in Odoo with its own reference;
   - the invoice moves to the “Paid” status.
5. **Closing:**
   - at the end of the month, every transaction is checked;
   - the transfer appears on the bank statement and is reconciled;
   - the accounting entries are generated automatically.

Tip

Used properly, each step in Odoo naturally feeds the next, with no double entry and with full traceability.

CHAPTER 10

The interface

10.1 Reaching Odoo

10.1.1 Logging in

To reach your Odoo system:

1. Open your web browser (Chrome, Firefox, Edge or Safari are recommended).
2. Type the URL of your Odoo instance in the address bar.
3. On the login page, enter your email address.
4. Enter your password.
5. Click **Log in**.

Tip

If you have forgotten your password, click the “Reset password” link and follow the instructions to set a new one.

10.1.2 Mobile applications

Odoo is also reachable through mobile applications for iOS and Android:

1. Download the Odoo application from the App Store or Google Play.
2. Launch the application and enter the URL of your Odoo server.
3. Log in with your usual credentials.

Note

Odoo’s official mobile applications generally require Odoo Enterprise (version 10 and above for iOS, 16 and above for Android). They give access to the essential features, but some advanced operations may still call for the web version.

10.2 Structure of the interface

10.2.1 Home screen and dashboard

Once you are logged in, you land on the home screen, which presents:

1. the application menu, at the top of the screen;
2. your main dashboard, if one is configured;
3. the recent and upcoming activities.

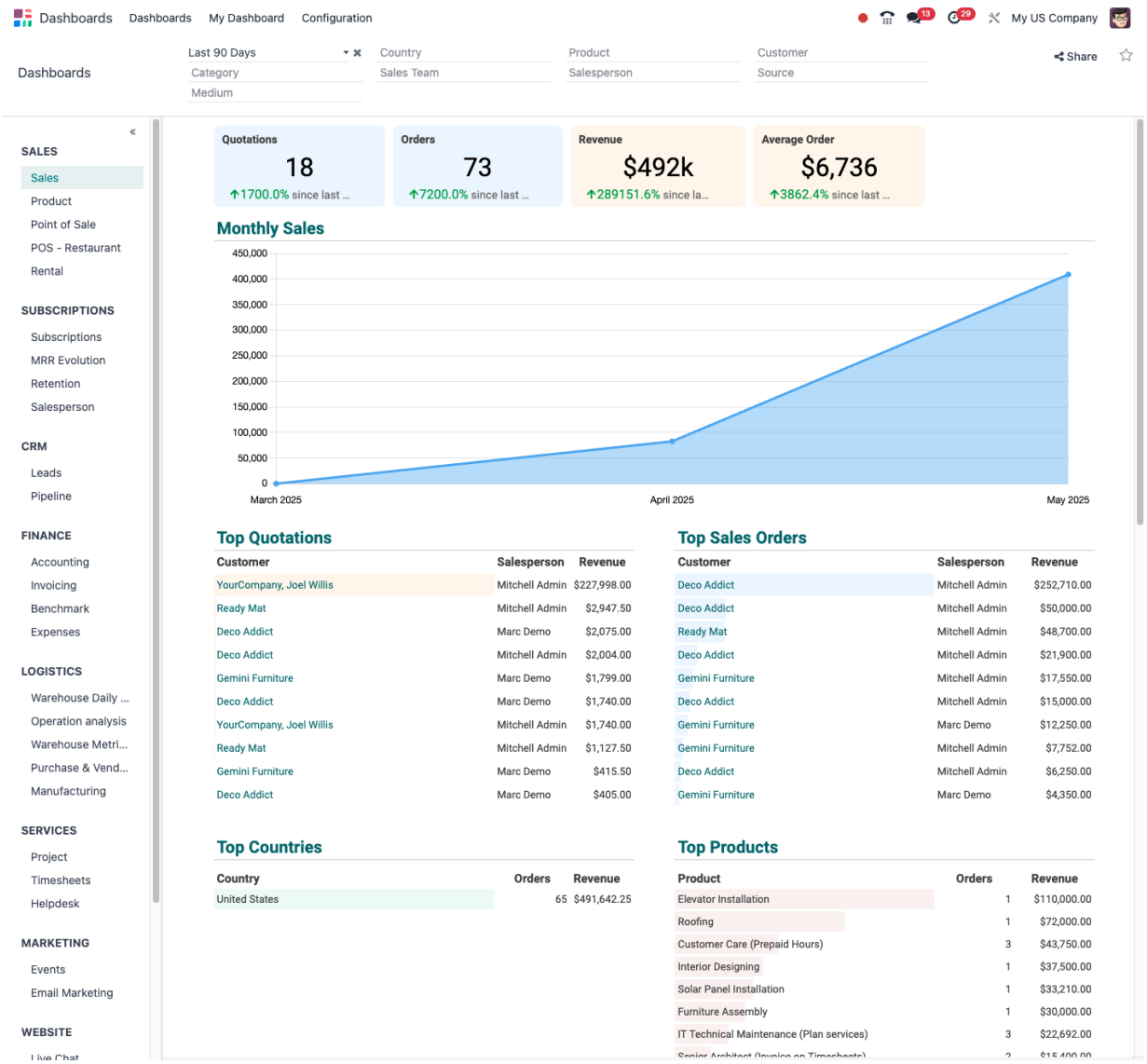


Figure 10.1: The Odoo dashboard

10.2.2 The main elements of the interface

Odoo's interface is made of several elements common to every application:

1. **The application bar**: at the top of the screen, it gives access to the applications installed.
2. **Search Bar**: a global search across the whole database.
3. **The navigation menu**: on the left, it shows the sections of the active application.
4. **The main area**: in the centre, it displays the active content: lists, forms and so on.
5. **The user menu**: at the top right, it gives access to the user settings.
6. **The breadcrumb**: at the top of the main area, it shows where you are.

10.3 Navigating in Odoo

10.3.1 The application menu

The application menu is the way into Odoo's various features:

1. Click the menu icon, the three horizontal bars at the top left.
2. Select the application you want from the list that appears.
3. To go back to the home screen, click the house icon.

You can change the order of the applications in the menu:

1. In the application menu, hover over an application's icon.

2. Click and hold the icon, then drag the application to the position you want.
3. The application then stays where you placed it.

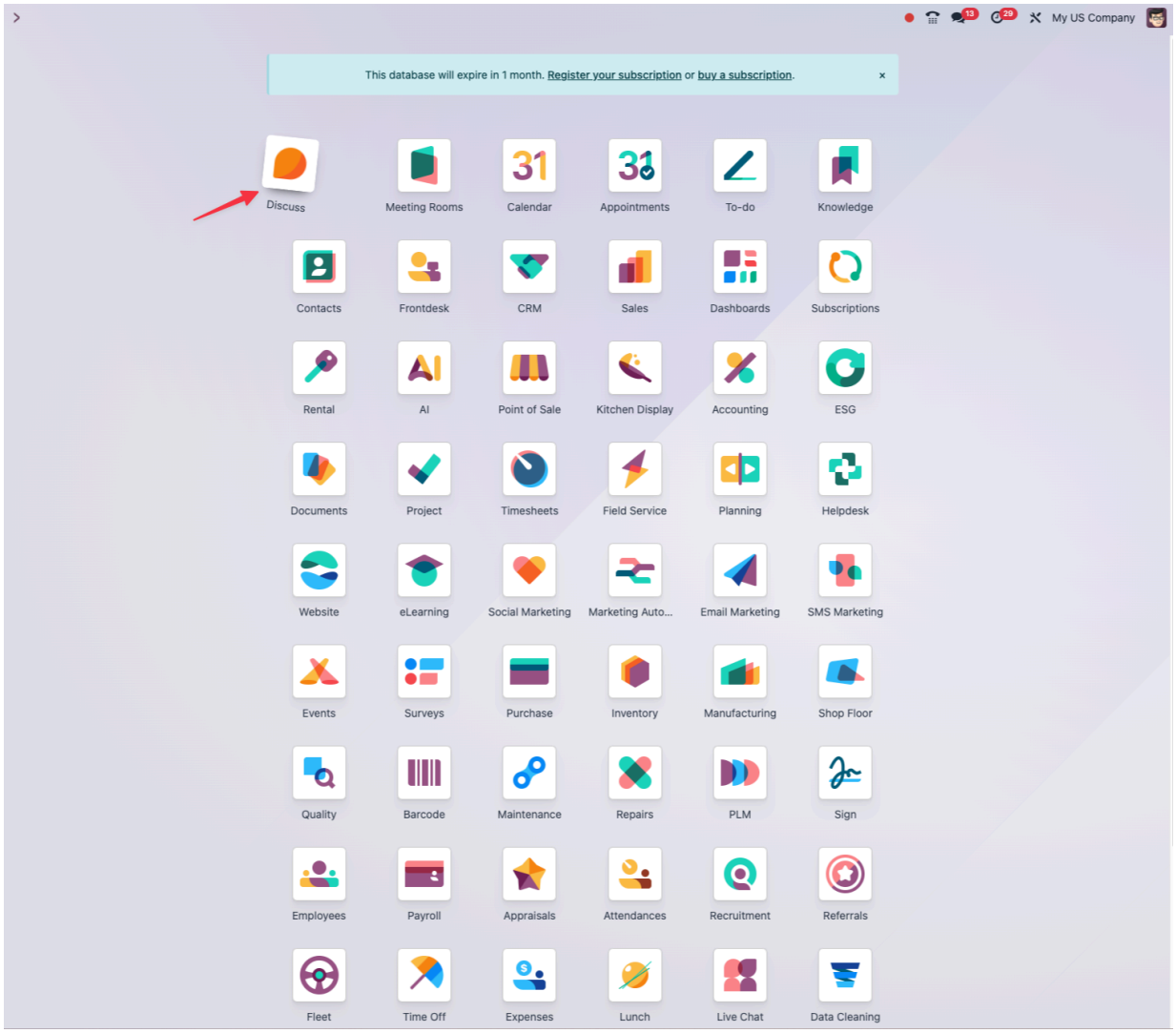


Figure 10.2: Reordering the favourite applications

10.3.2 The navigation menu

Each application has a navigation menu at the top of the screen:

1. The main menu entries give access to the features of the application.
2. Some menus hold sub-menus, shown by an arrow.
3. Click a menu entry to reach the matching feature.

10.3.3 Global search

The search bar at the top of the screen lets you find any piece of information quickly:

1. Click in the search bar and type your search term.
2. The results appear sorted by category: customers, products, documents and so on.
3. Click a result to open it directly.

Tip

Odoo's global search is straightforward and looks in every relevant field. Simply type the terms you are looking for and Odoo displays the matching results, sorted by type of record.

10.4 Types of view

Odoo offers several ways of displaying your data, to suit the task in hand.

10.4.1 List view

The list view displays your data as a table:

1. Each row is a record: a customer, a product, an order.
2. The columns show the different pieces of information.
3. Click a row to open the matching record.
4. Use the column headers to sort the data.

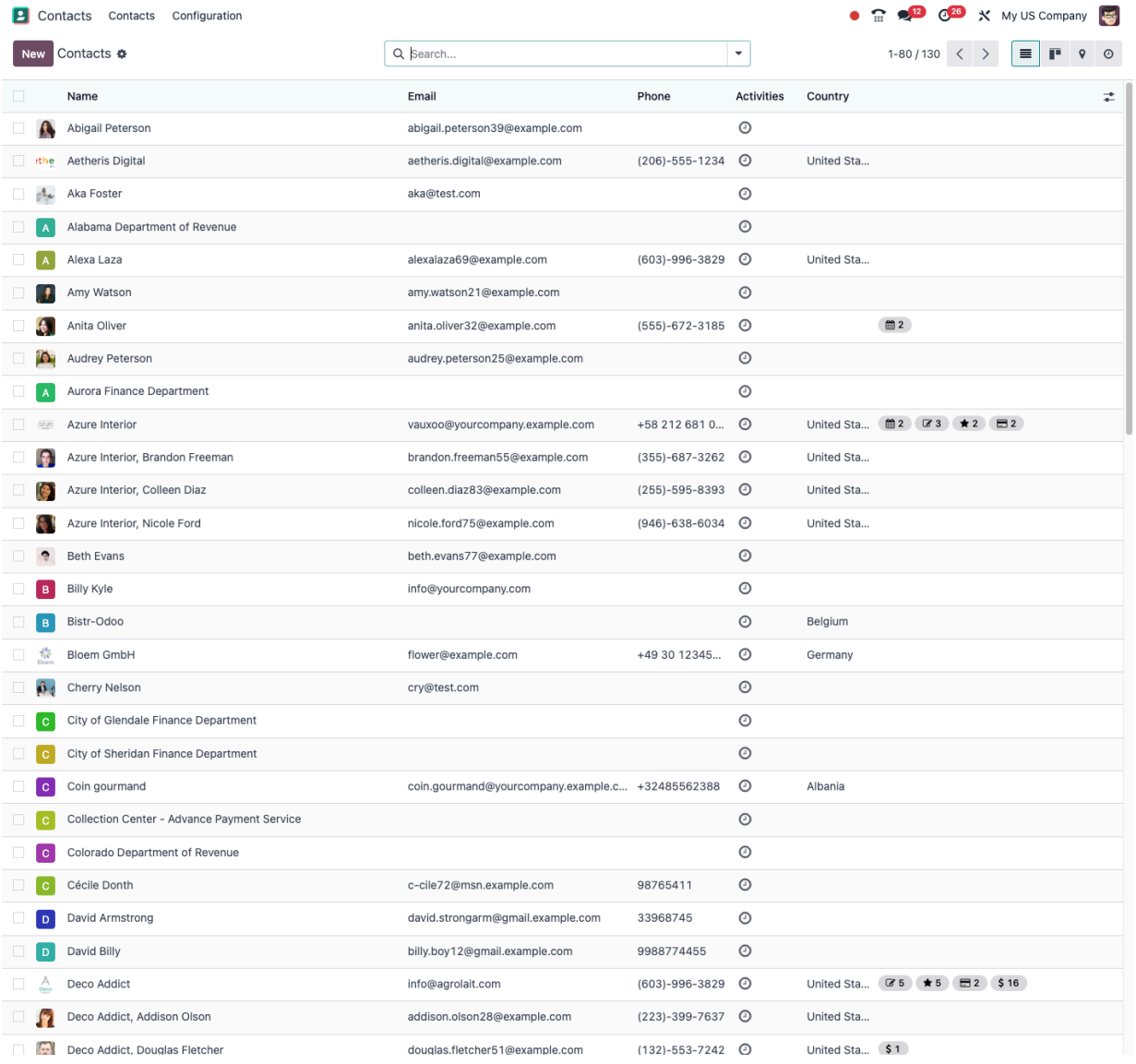


Figure 10.3: An example of a list view

In list views you can select several records at once:

1. Tick the boxes to the left of the rows you want.
2. Use the box at the very top to select or clear every record.
3. With a selection active, an “Action” menu appears for bulk operations.

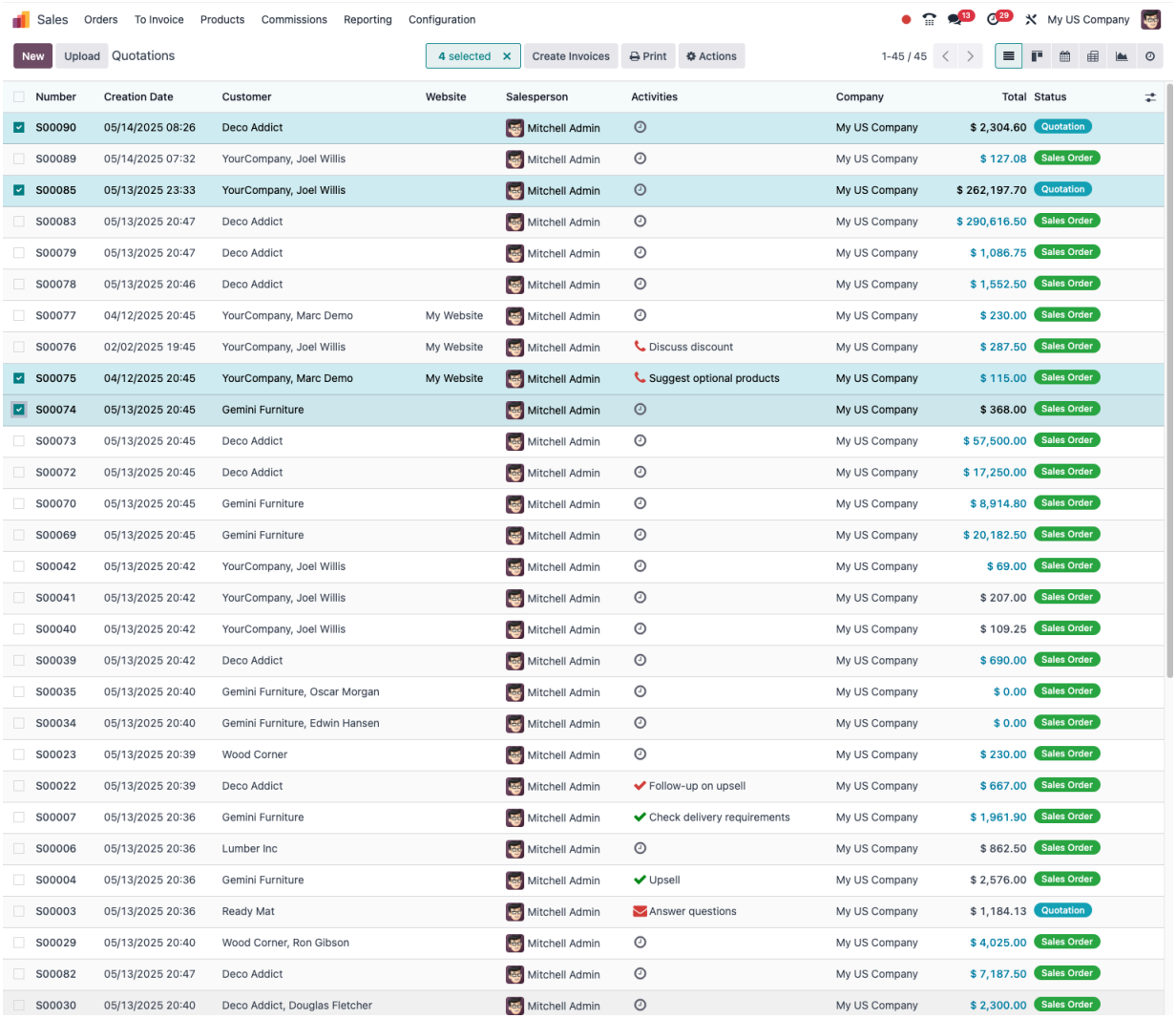


Figure 10.4: Selecting several records

10.4.2 Form view

The form view lets you consult and change a particular record:

1. The information is organised into sections or tabs.
2. Mandatory fields are generally marked with an asterisk.
3. The action buttons sit at the top of the form.
4. Use the navigation arrows to move from one record to the next.

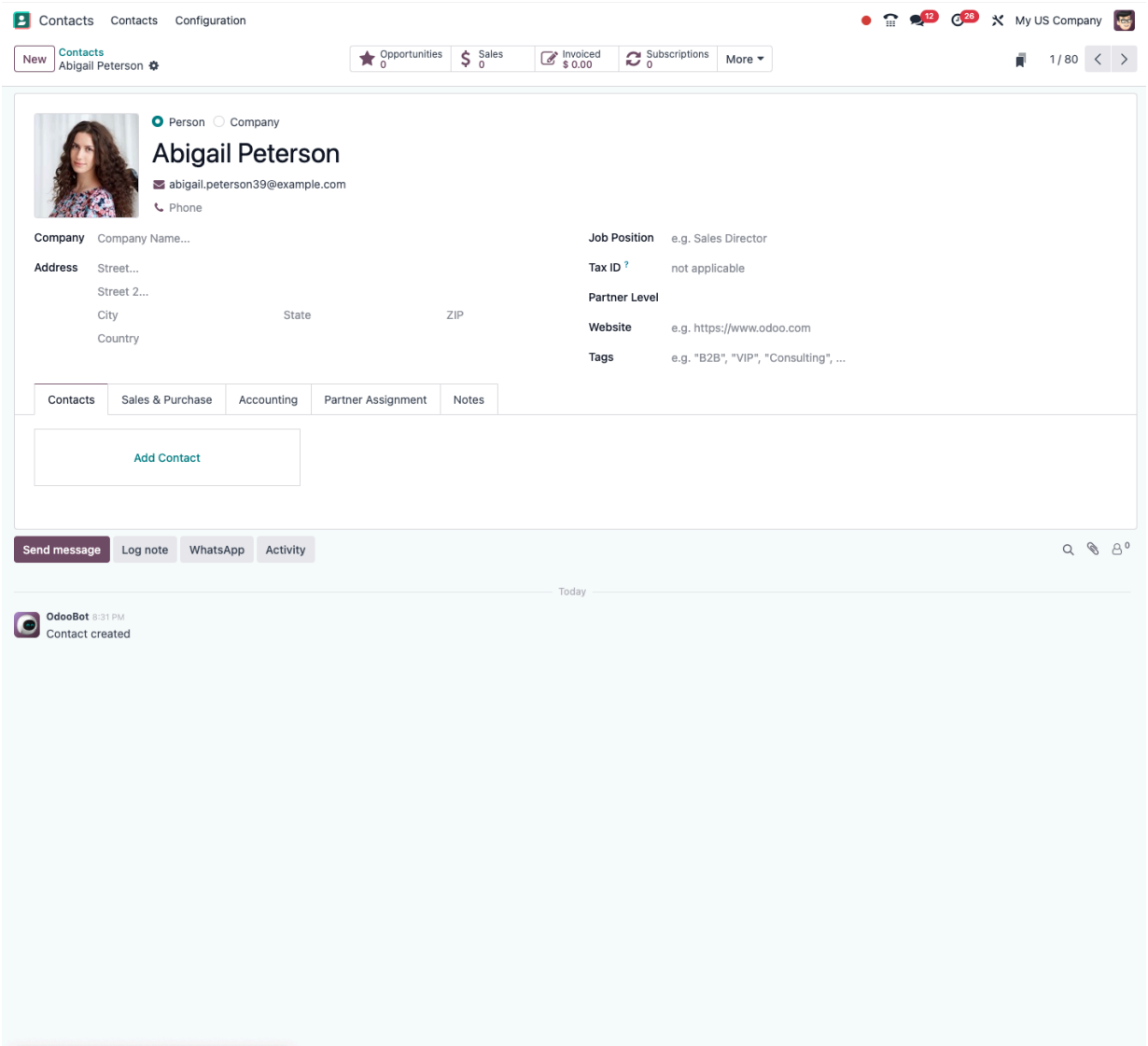


Figure 10.5: An example of a form view

10.4.3 Kanban view

The kanban view presents the data as cards, often organised in columns:

1. Each card is a record.
2. Cards can be moved from one column to another by drag and drop.
3. Click a card to open the matching record.

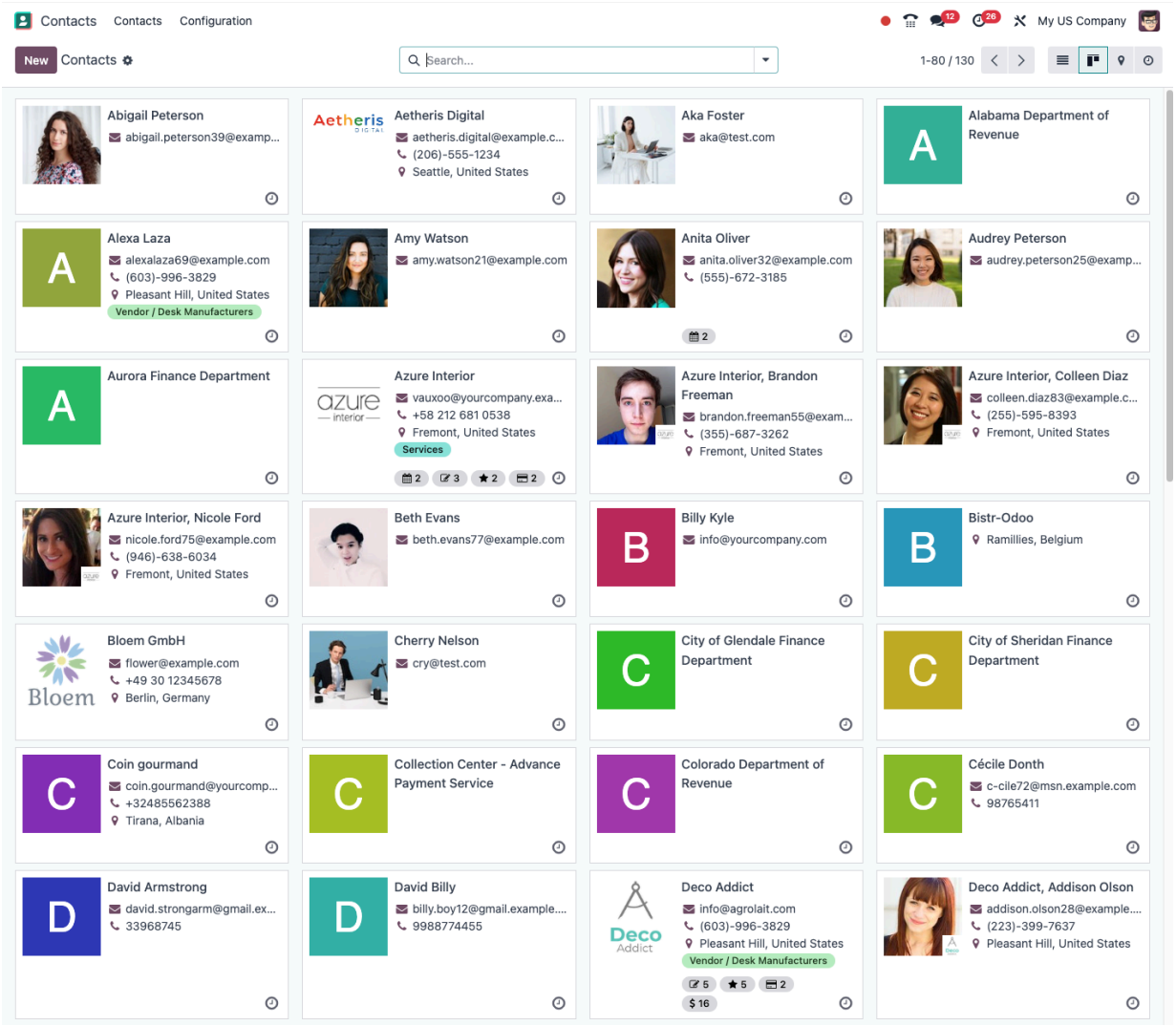


Figure 10.6: An example of a kanban view

Tip

The kanban view is particularly useful for seeing workflows (a sales pipeline, project tasks) and for following how items progress.

10.4.4 Other types of view

Odoo also offers other views for specific needs:

- **Calendar View**: displays events on a calendar, by day, week or month.
- **Graph View**: presents data as charts and diagrams.
- **Pivot view**: lets you analyse data with pivot tables.
- **Gantt view**: shows project scheduling as Gantt charts.
- **Activity view**: organises tasks by due date: today, tomorrow, later.

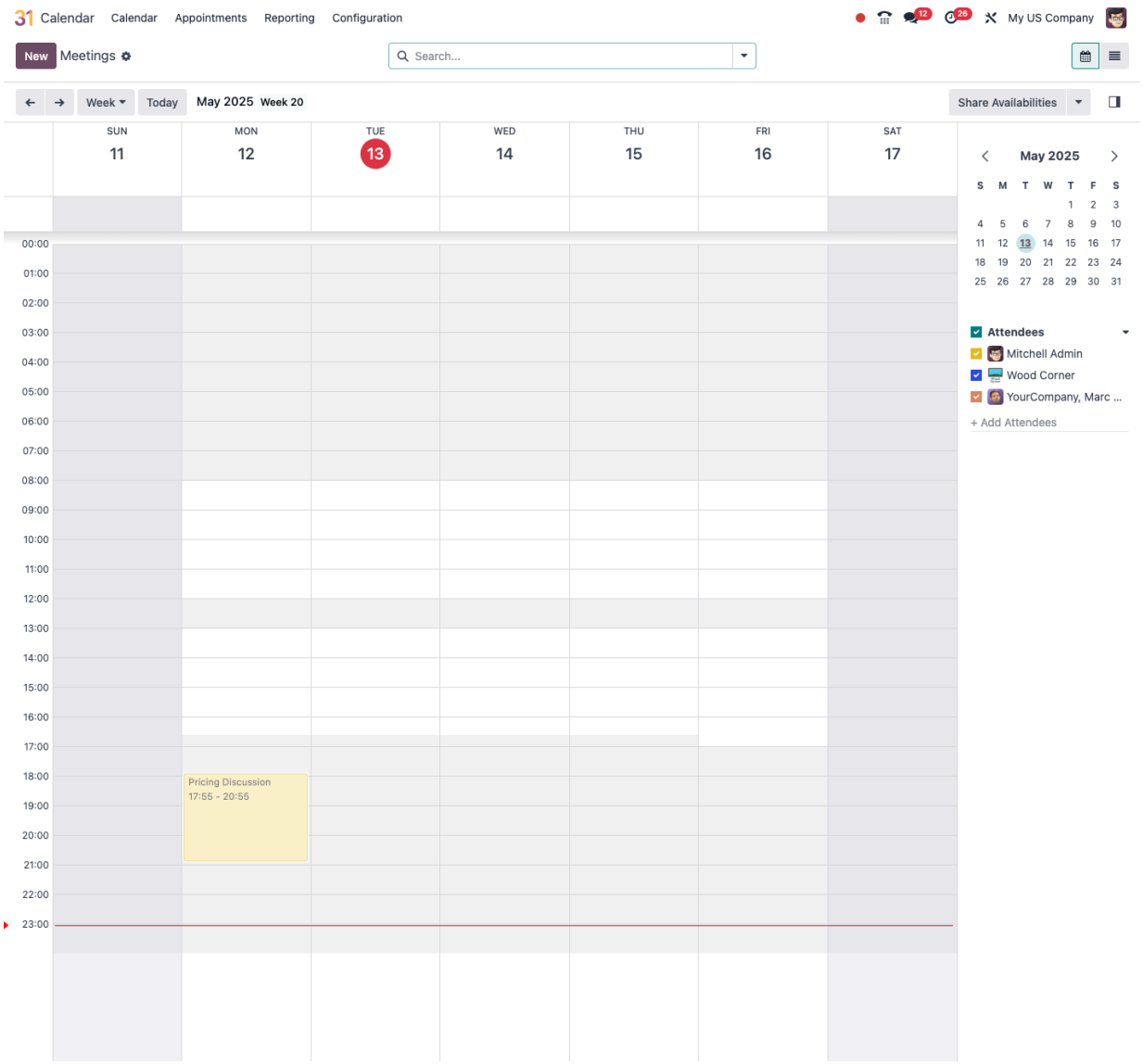


Figure 10.7: An example of a calendar view

10.5 Filtering and grouping

10.5.1 Search filters

Filters narrow down what is displayed:

1. Click **Filters** in the search bar.
2. Select a predefined filter or build a custom one.
3. Filters can be combined to narrow the results further.
4. To save a filter you use often, click **Favorites** then **Save current search**.

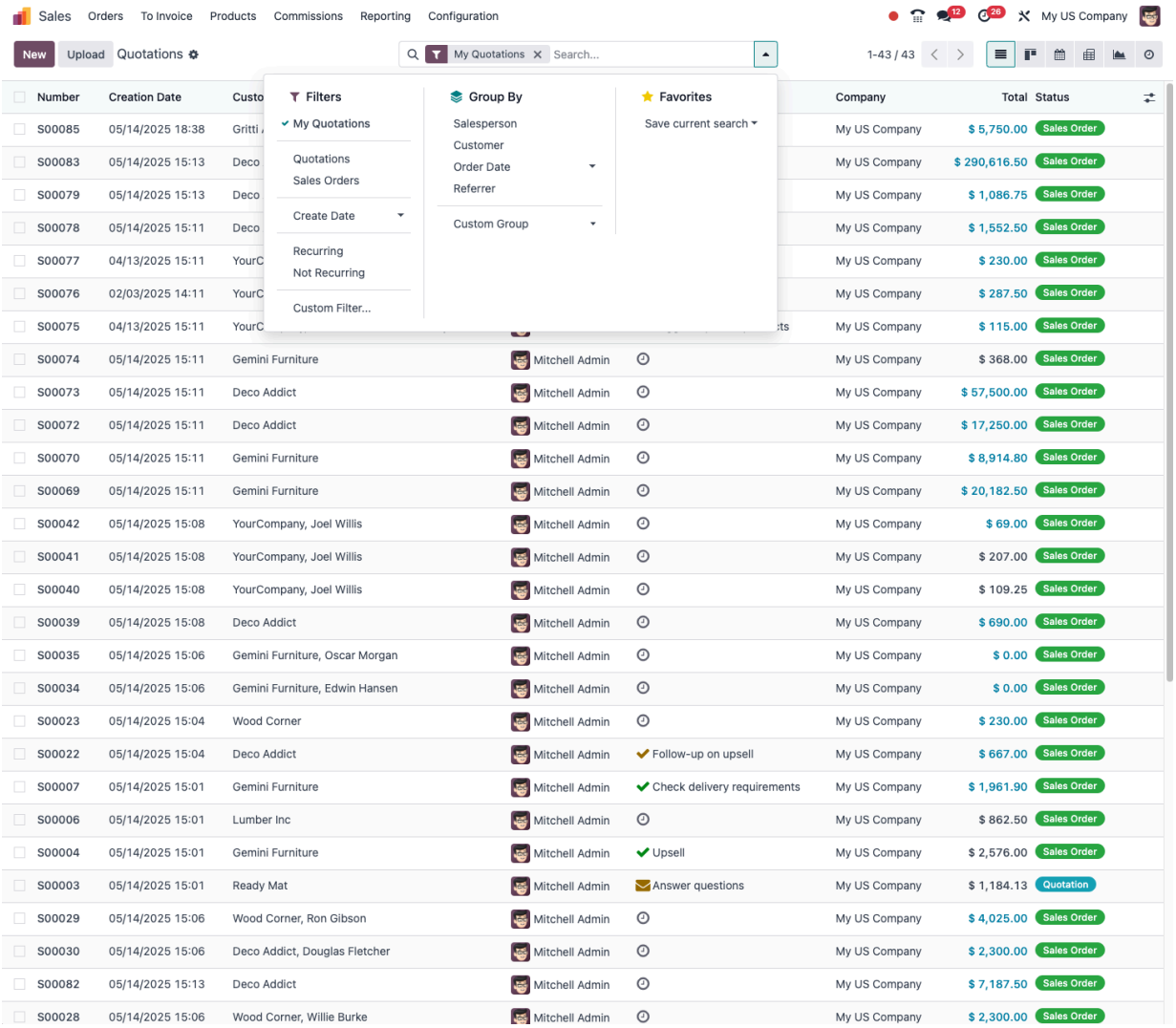


Figure 10.8: Using the search filters

10.5.2 Grouping

Grouping organises the data by a given criterion:

1. Click **Group By** in the search bar.
2. Select the grouping criterion you want.
3. The data is then organised into collapsible sections.
4. You can add several levels of grouping.

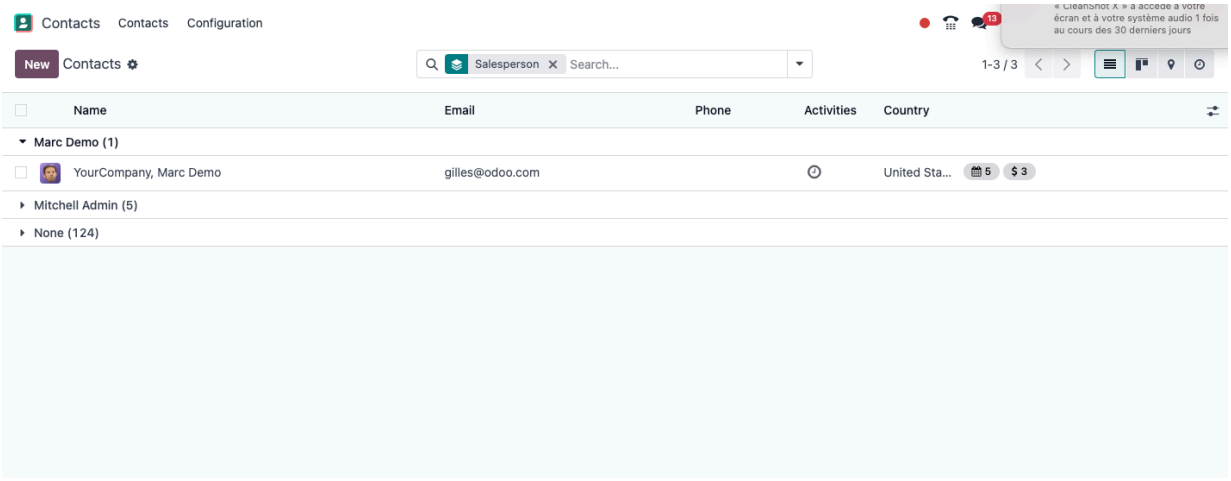


Figure 10.9: Grouping the data

10.6 Common actions

10.6.1 Creating, editing and deleting

To work with records in Odoo:

1. **Create**: click the **Create** or **New** button.
2. **Edit**: open a record and click **Edit**, or change it directly in form view.
3. **Save**: once the change is made, click **Save**.
4. **Archive and unarchive**: use the **Archive** button to hide a record without deleting it.
5. **Delete**: to delete permanently, use the **Action** menu then **Delete**.

Note

Archiving is generally preferable to deleting, because it preserves the history and the links between records. Archived items can be found again by applying the “Archived” filter.

10.6.2 Importing and exporting data

To import or export data:

1. **Import**: in list view, click **Import** and follow the wizard.
2. **Export**: select the records to export, then click **Action** and **Export**.

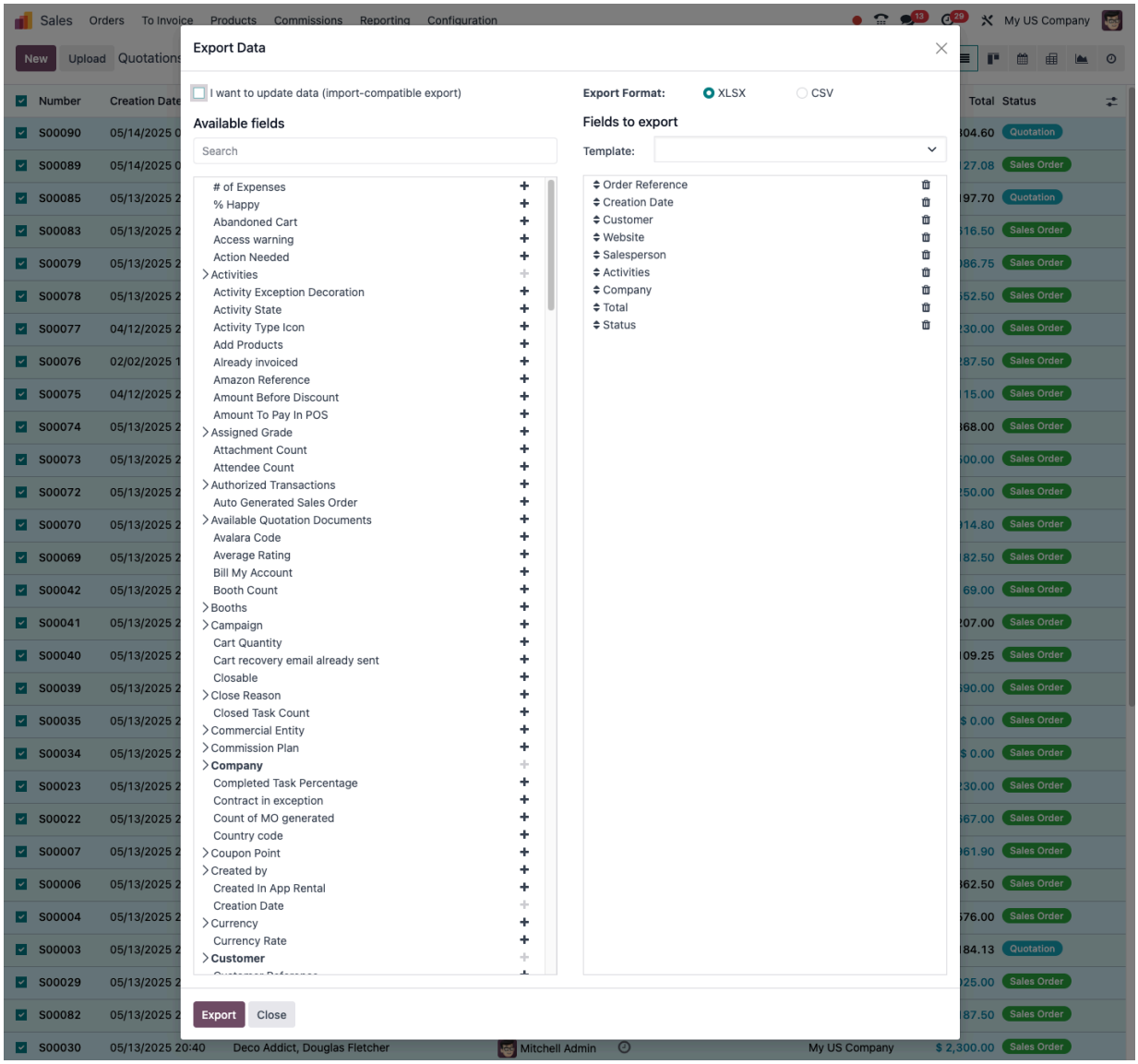


Figure 10.10: The import and export options

Tip

For complex imports, start by exporting a few similar records to obtain a model of the format Odoo expects.

10.7 User preferences

10.7.1 Personal settings

To tailor your Odoo experience:

1. Click your avatar at the top right.
2. Select **Preferences**.
3. Change the settings to suit you:
   - profile picture;
   - display language;
   - timezone;
   - date and time format;
   - email signature.
4. Click **Save** to apply the changes.

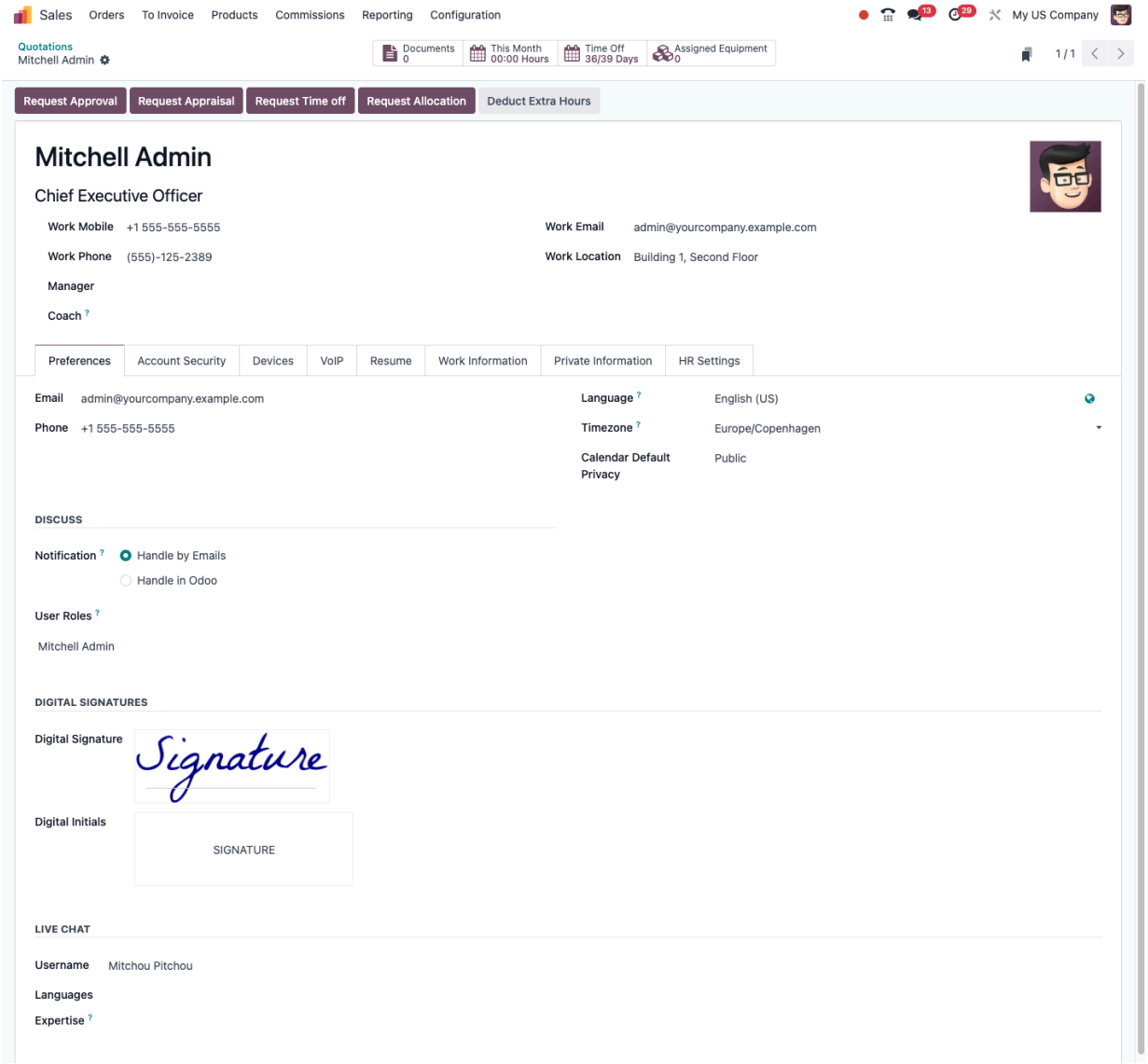


Figure 10.11: The user preferences

Note

For the full list of the shortcuts available, see the “Keyboard shortcuts” appendix at the end of this document.

10.8 Help and support

10.8.1 Contextual help

Odoo offers contextual help from the interface:

1. Click the help icon at the top right.
2. Select **Documentation** to reach the online help.
3. Or choose the support entry to contact the support team, where that is available.

10.8.2 Developer mode

Developer mode offers advanced features for administrators:

1. Click your avatar at the top right of the screen.
2. Select **Settings**.
3. Enable the developer mode option.
4. Or add `?debug=1` to the end of the URL.

Tip

Developer mode gives access to technical information, lets you customise views, run advanced actions and solve certain problems.

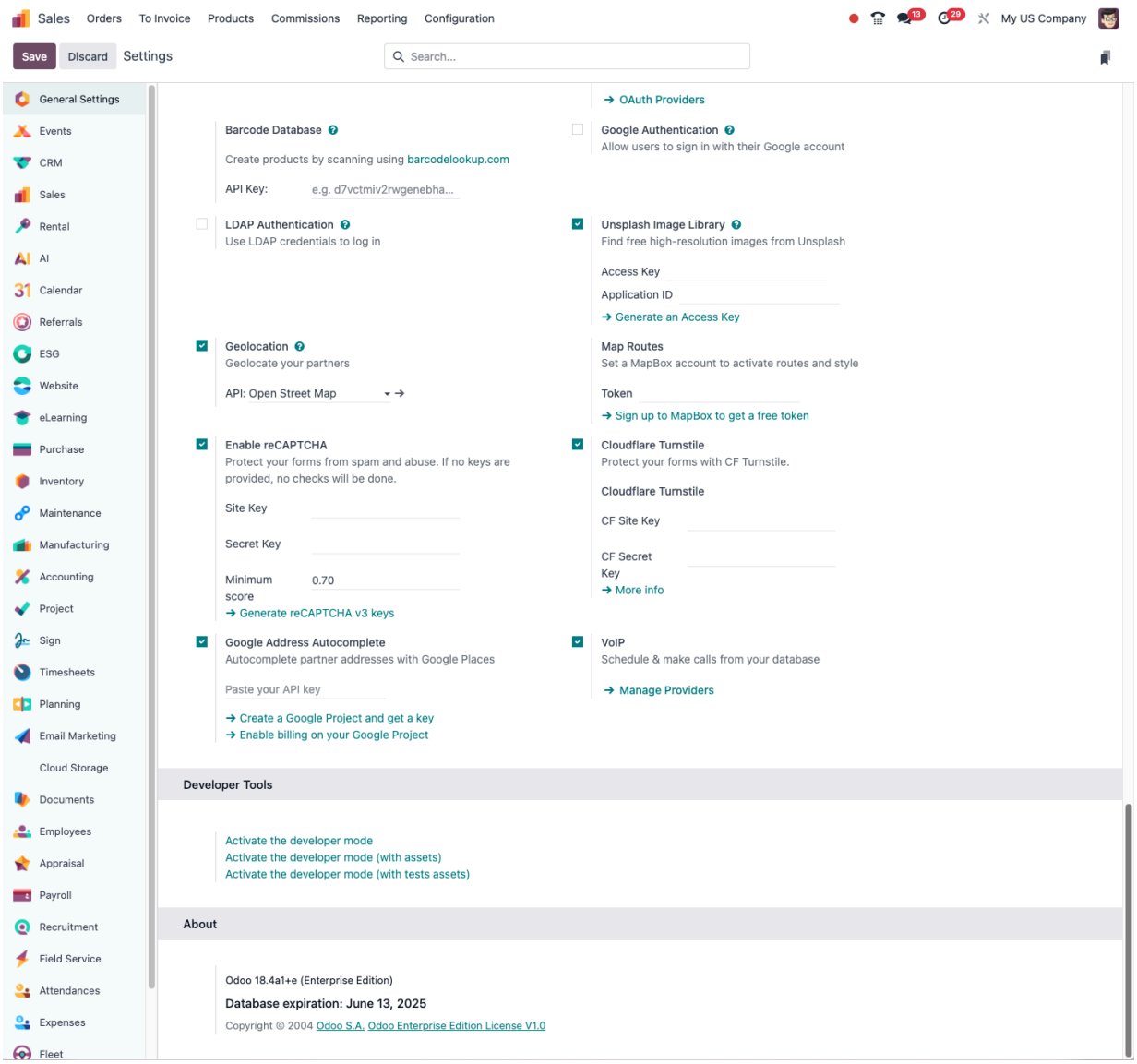


Figure 10.12: Enabling developer mode

CHAPTER 11

Core features

11.1 Handling contacts

Handling contacts sits at the heart of Odoo and underpins many applications: sales, CRM, accounting and others.

11.1.1 Creating a new contact

To create a new contact in Odoo:

1. Open the **Contacts** application.
2. Click **Create**.
3. Fill in the contact's information.
4. Set the type of contact: individual or company.
5. Add the contact details: phone, email.
6. Select tags to classify the contact.
7. Click **Save**.

Tip

Use tags to organise your contacts by category. You can create as many tags as you need, to make searching and filtering easier.

11.1.2 Individual contacts and companies

Odoo distinguishes two types of contact:

1. **Individual**: a natural person.
2. **Company**: a business or an organisation.

Individuals can be attached to a company, which builds a hierarchy of contacts. That is particularly useful for handling the different people within the same customer or vendor.

If you have duplicate contacts, Odoo lets you merge them easily:

1. Select the contacts to merge in list view.
2. Click **Action** then **Merge**.
3. Choose which information to keep on the final contact.
4. Confirm the merge.

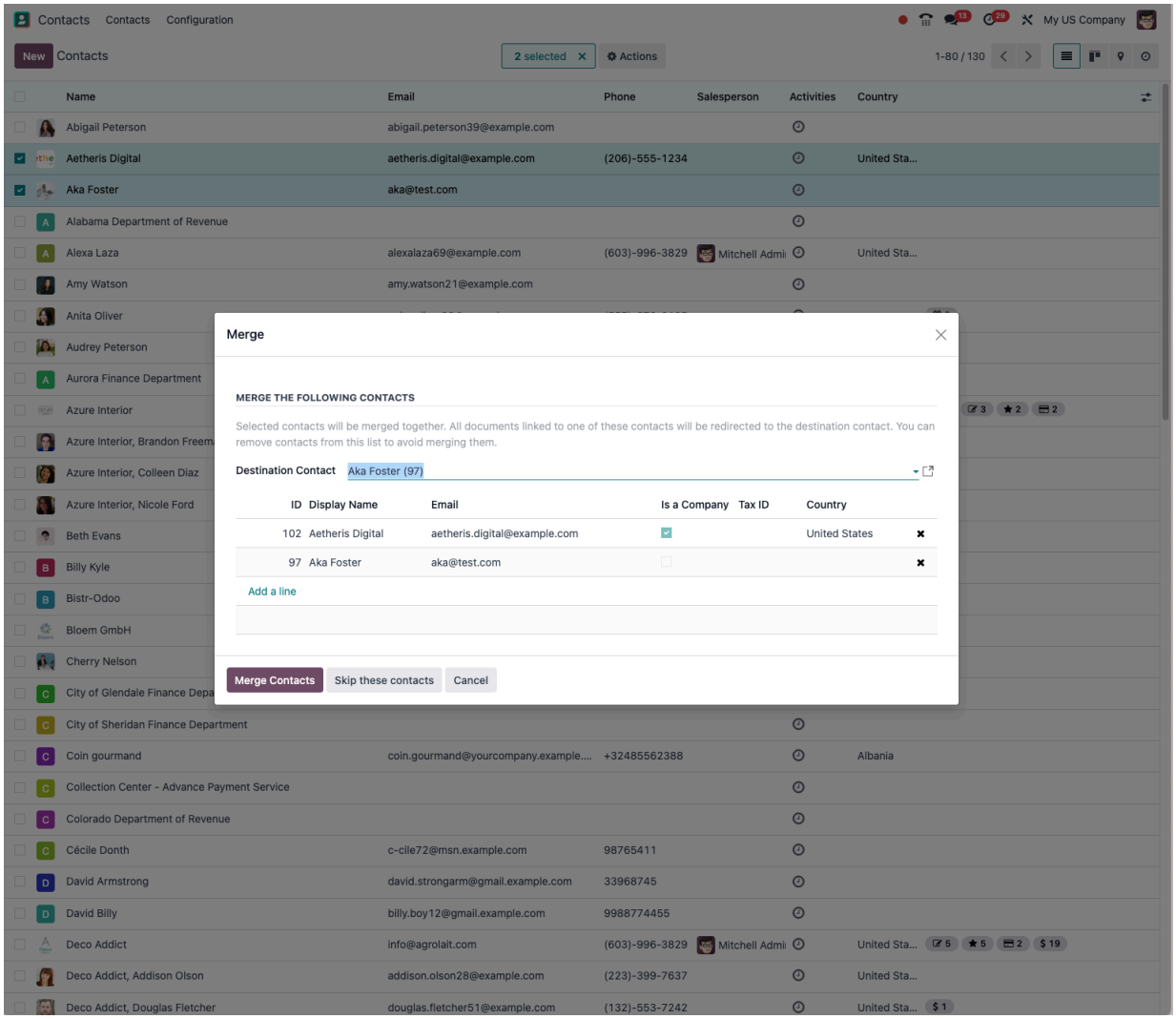


Figure 11.1: Merging duplicate contacts

11.2 Searching and filtering

Odoo offers powerful search and filter features for finding the information you need quickly.

11.2.1 Using the global search

The search bar at the top of the interface finds any type of record in Odoo quickly.

11.2.2 Advanced filters

For more precise searches, use the advanced filters:

1. Click **Filters** in the view header.
2. Select a predefined filter or build a custom one.
3. Combine several conditions to narrow your search.
4. Save the filters you use often.

Create and save your own search filters for quick access to the data you consult regularly:

1. Define your search criteria.
2. Click **Favorites** then **Save current search**.
3. Give your filter a name.
4. Choose whether the filter is to be shared with every user.
5. Click **Save**.

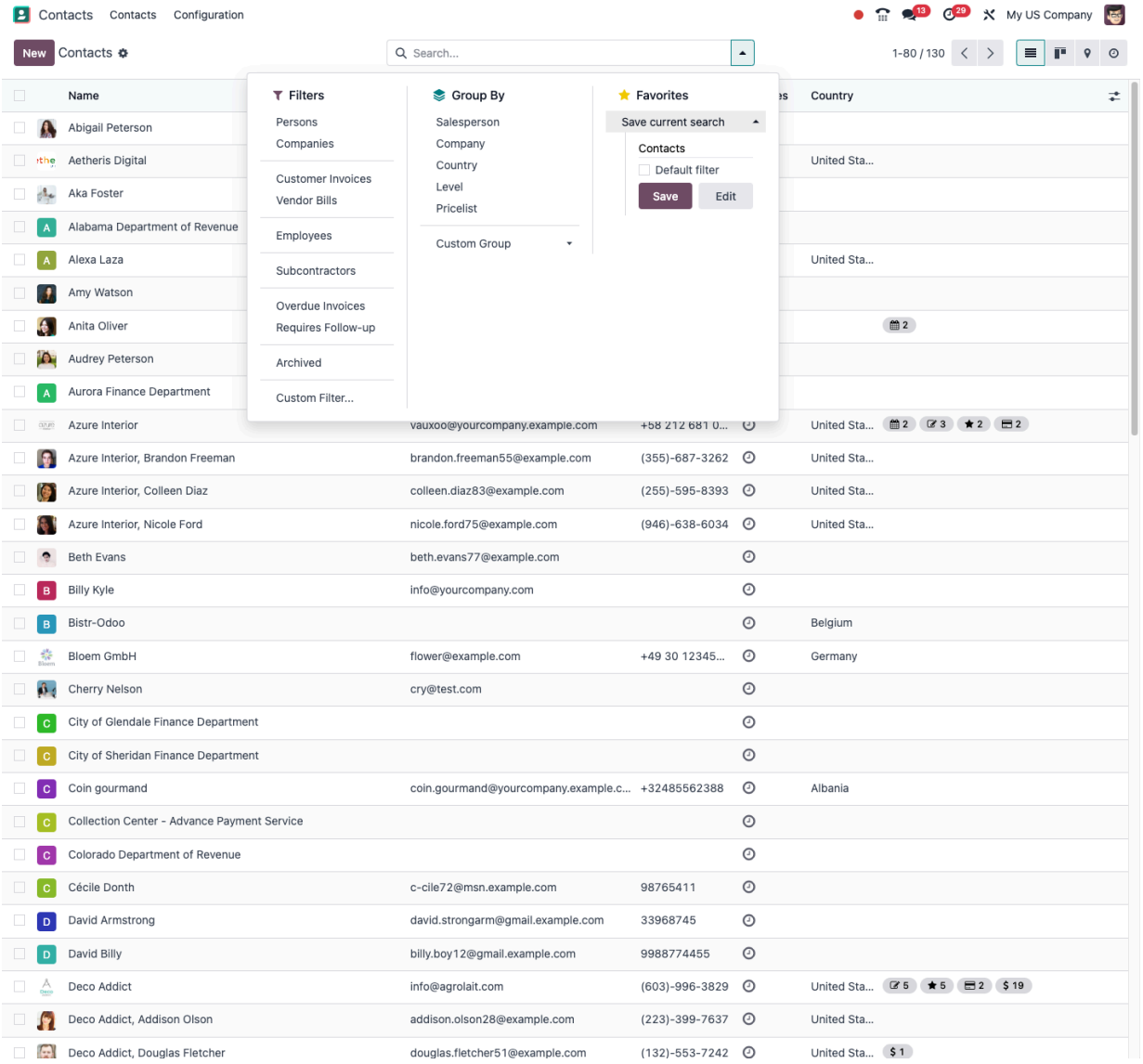


Figure 11.2: Saving a custom filter

11.2.3 Grouping data

Grouping organises your data visually by various criteria:

1. Click **Group By** in the view header.
2. Select the grouping criterion: country, category, status and so on.
3. You can add sub-groupings for a more detailed analysis.

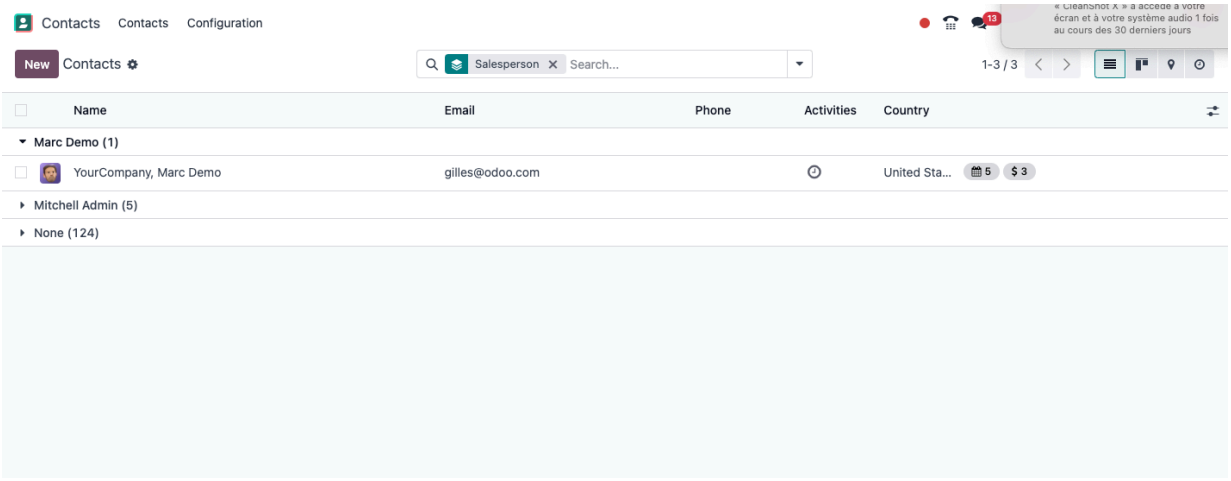


Figure 11.3: Grouping data

Note

Grouping is particularly useful in list and kanban views. In list view it creates a hierarchy you can expand to see the detail.

11.3 Importing and exporting data

Odoo makes importing and exporting data straightforward, which matters both during the initial setup and for outside analysis.

11.3.1 Importing data

To import data into Odoo:

1. Open the list view of the record type concerned.
2. Click **Import**.
3. Download a template file if you need one.
4. Prepare your CSV or XLS file with the data to import.
5. Upload your file.
6. Map the columns to the Odoo fields.
7. Check and run the import.

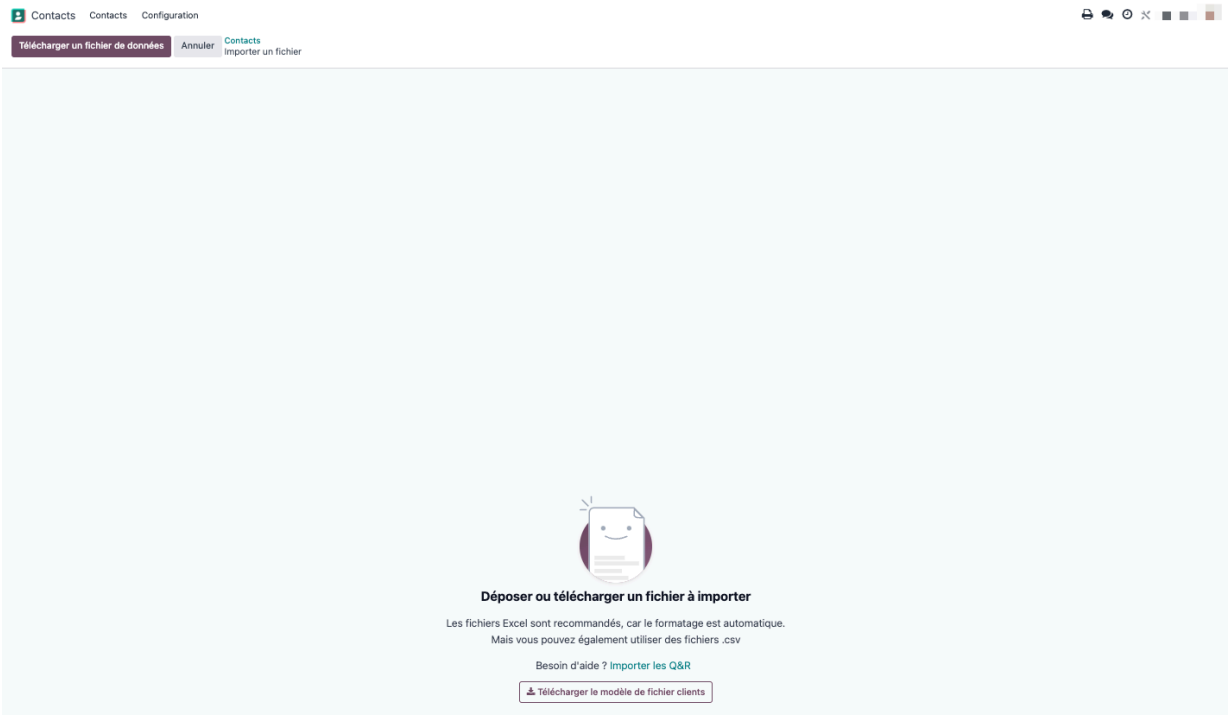


Figure 11.4: The data import wizard

An example of a CSV structure for importing contacts:

```
name,company_type,email,phone,street,city,zip,country_id,customer_rank,supplier_rank
ABC Ltd,company,contact@abc.com,+33123456789,12 rue Exemple,Paris,75001,France,1,0
Jean Dupont,individual,jean.dupont@example.com,+33612345678,25 avenue
Test,Lyon,69001,France,0,1
```

Tip

For complex imports, start by exporting similar data from Odoo to obtain a model with the right structure, which you can then adapt.

11.3.2 Exporting data

To export data from Odoo:

1. Open the list view and apply the filters you want.
2. Select the records to export, or leave everything selected.
3. Click **Action** then **Export**.
4. Choose the fields to export.
5. Select the export format: CSV or XLS.
6. Click **Export**.

11.4 Activities and notes

Odoo offers a cross-cutting activity system for planning and following the actions to be carried out on any record.

11.4.1 Scheduling an activity

To schedule an activity:

1. Open the record concerned: a contact, an opportunity, a project.
2. Click **Activities** then **Schedule Activity**.
3. Select the type of activity: call, meeting, email and so on.
4. Set a due date.
5. Assign the activity to a user.

6. Add a note if needed.
7. Click **Schedule**.

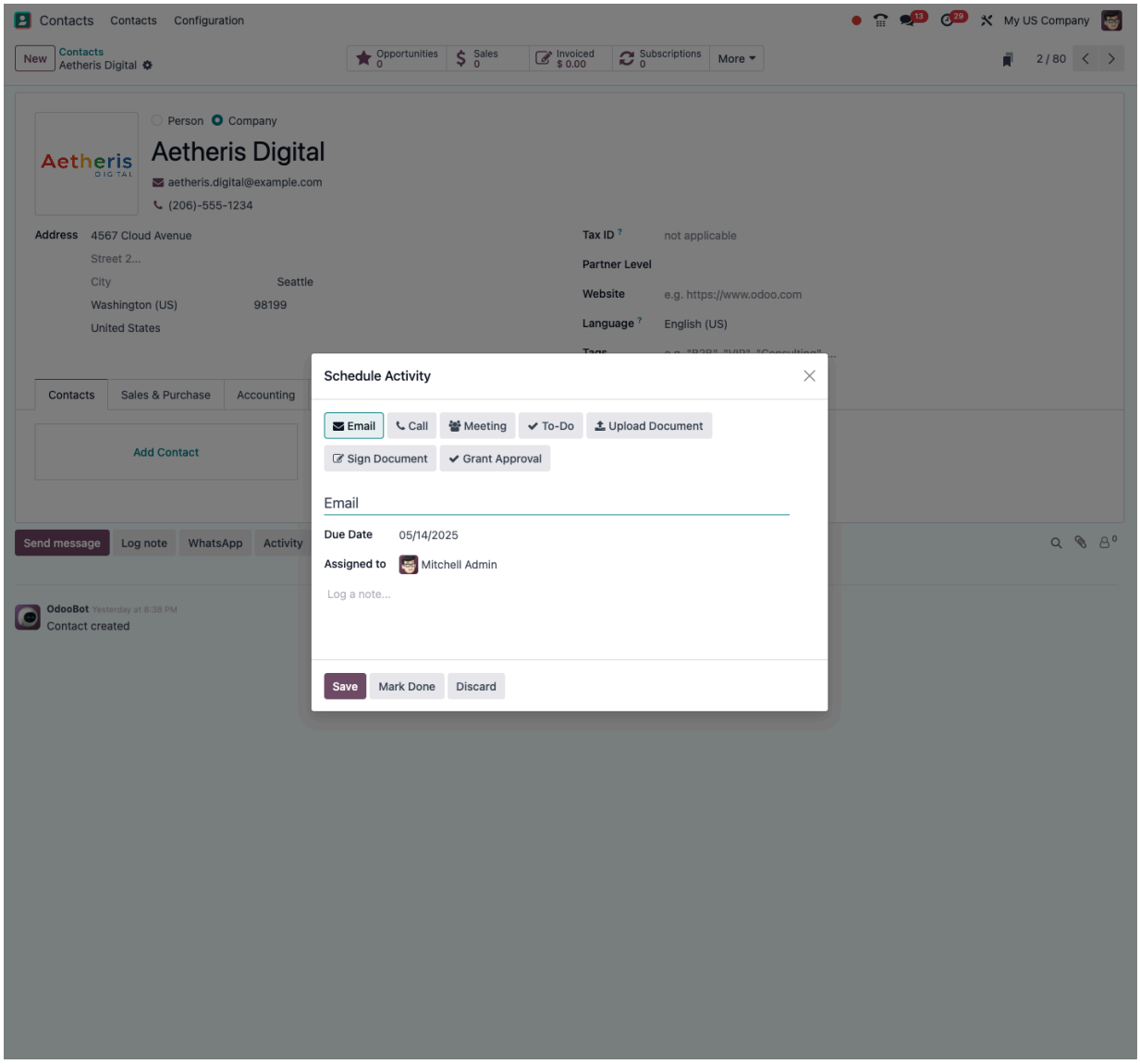


Figure 11.5: Scheduling an activity

Reach all your planned activities from the **Activities** menu in the navigation bar. That dashboard shows:

1. overdue activities;
2. activities due today;
3. activities planned for the coming days.

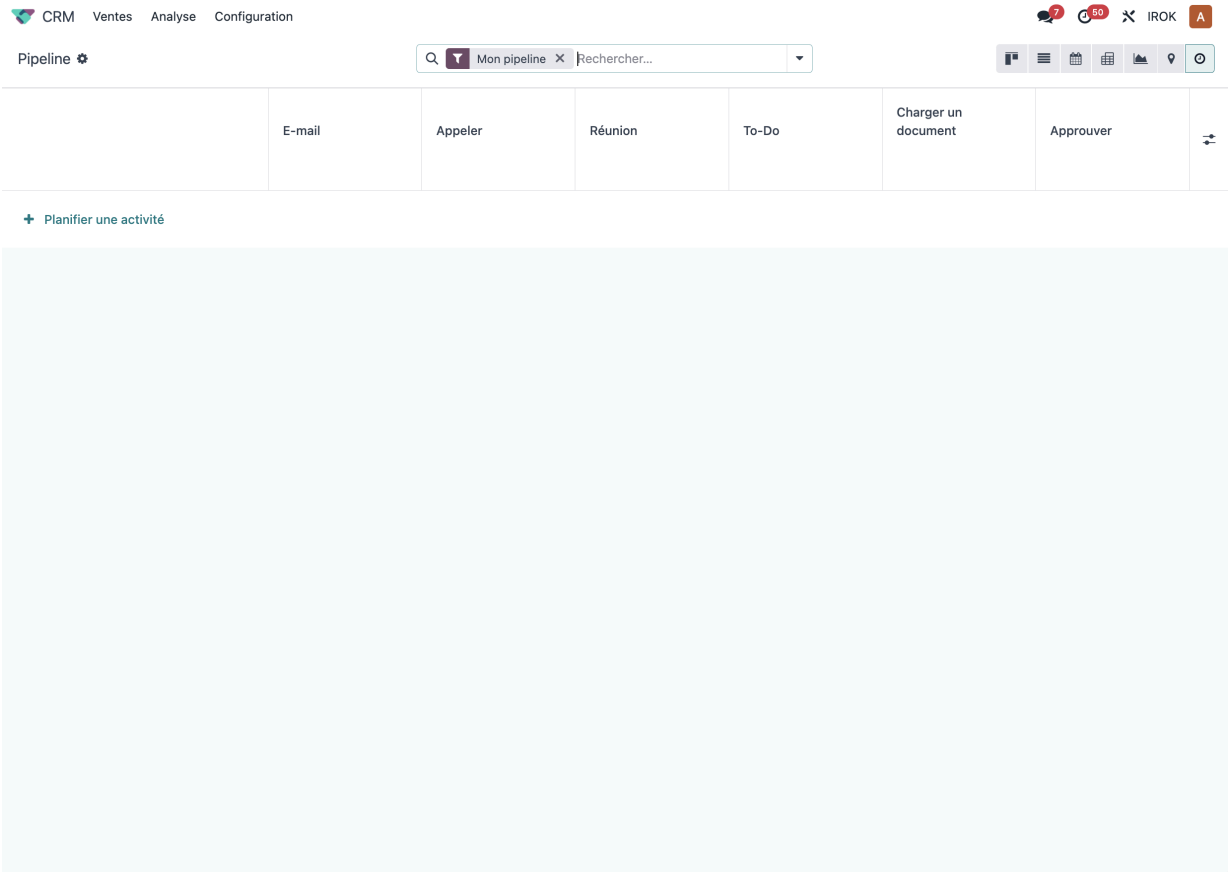


Figure 11.6: The activity dashboard

11.4.2 Adding notes and messages

Odoo's internal messaging system, the chatter, lets you add notes and exchange messages on every record:

1. Open the record concerned.
2. In the messages and notes area at the bottom of the form:
3. Select **Note** for a note visible only to employees.
4. Or select **Message** for a communication that can include outside partners.
5. Write your text.
6. Add attachments if needed.
7. Click **Send**.

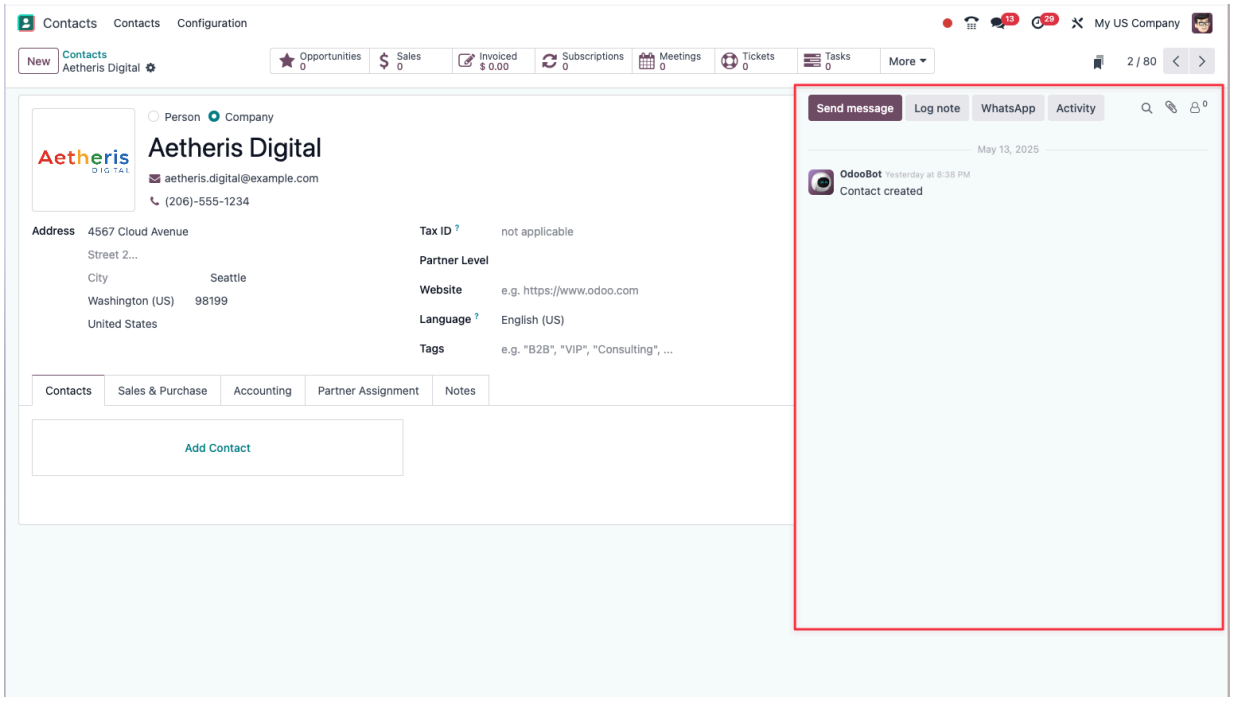


Figure 11.7: The messages and notes area, the chatter

Note

Notes are never sent to outside partners, even when they follow the record. They serve internal communication only.

11.5 The rich text editor

Odoo includes a rich text editor for writing formatted content: emails, notes, descriptions. It offers many formatting options:

1. text formatting: bold, italic, underline;
2. bulleted and numbered lists;
3. tables;
4. inserting images;
5. hyperlinks;
6. paragraph styles;
7. text and background colours.

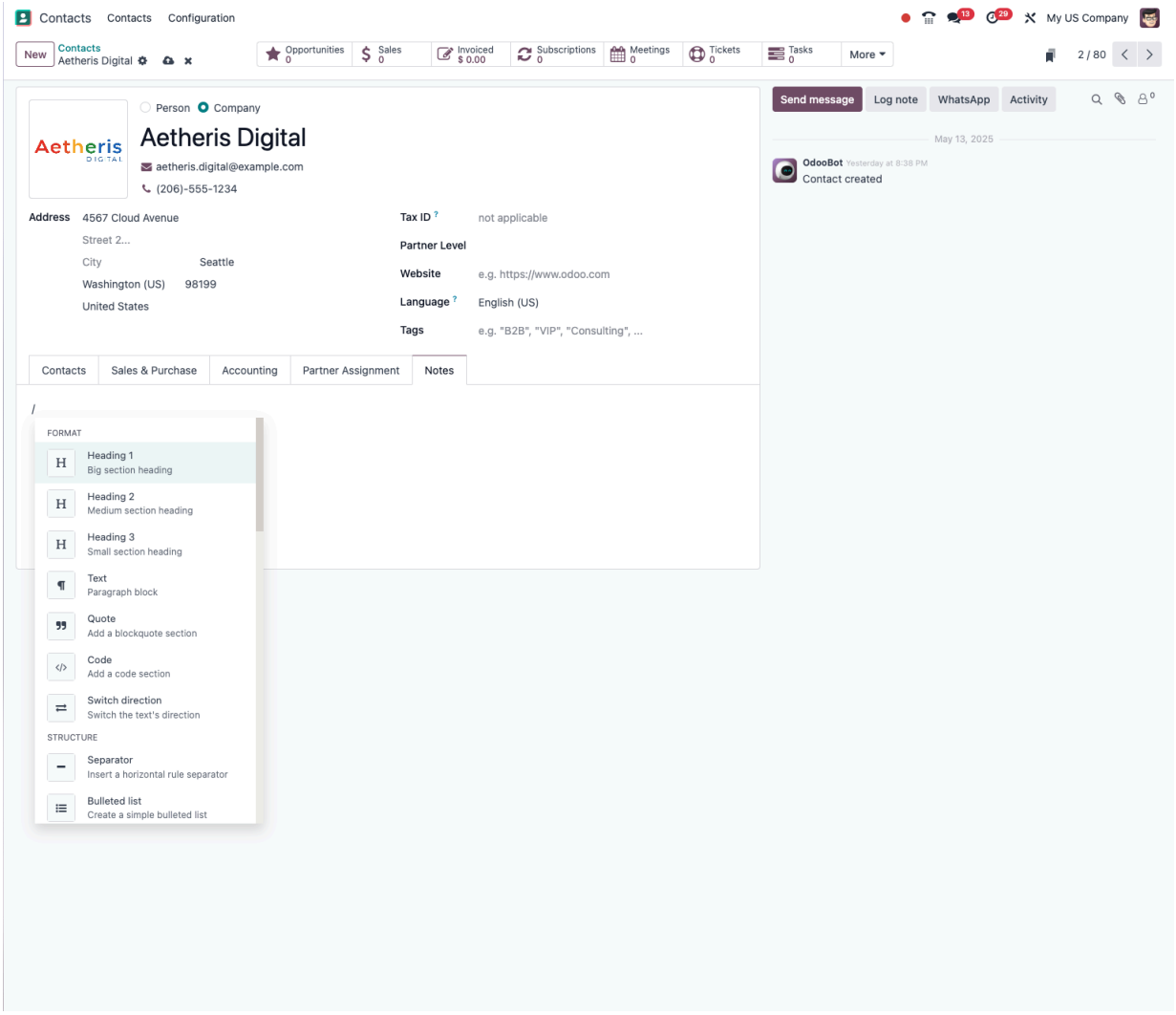


Figure 11.8: The rich text editor

Tip

Use `Ctrl` + `K` (or `Cmd` + `K` on a Mac) to insert a link quickly in your text. On a Mac, press `Control` on any Odoo screen to see every keyboard shortcut available.

CHAPTER 12

Advanced CRM

12.1 Advanced CRM features

Odoo's CRM module offers advanced features that let you improve your sales process and follow your opportunities more closely.

12.1.1 Customising the sales pipeline

The sales pipeline is fully customisable to match your sales process:

1. Open **CRM → Configuration → Pipeline → Stages**.
2. Create or edit the stages to match your sales process.
3. Set the order of the stages and the probabilities attached to them.
4. Assign colours for easier reading.
5. Enable or disable the features specific to each stage.

Tip

Build a pipeline that faithfully reflects your real sales process: your sales team will adopt it more readily and your sales forecasts will be more accurate.

12.1.2 Handling sales teams

Odoo lets you structure your salespeople into teams for better organisation:

1. Open **CRM → Configuration → Sales Teams**.
2. Create the teams you need: by region, product, customer segment and so on.
3. Assign members to each team.
4. Set targets by team.
5. Configure the specific access rights.

Note

Sales teams drive the automatic assignment of opportunities and allow segmented reporting, for better sales steering.

12.2 Automating the sales processes

Automation improves your sales processes, secures regular follow-up and frees time for your teams.

12.2.1 Automatic assignment rules

Route leads to the right salesperson automatically:

1. Open the lead assignment rules in the CRM configuration.
2. Create rules based on various criteria: country, source, product of interest and so on.
3. Define the actions to trigger: assignment to a user or to a team.
4. Enable or disable the rules as you need them.

Examples of automatic assignment rules:

- leads from the IT sector to the digital solutions team;
- leads from a given region to the matching regional team;
- leads coming from the website form to the web marketing team;
- leads with an expected amount above 10,000 € to the sales manager.

12.2.2 Automated actions and scheduling

Odoo lets you configure automatic actions to keep the sales activity going:

1. Open **Settings → Technical → Automation → Scheduled Actions**.
2. Create automatic actions based on conditions.
3. Define the trigger: time elapsed, change of stage and so on.
4. Configure the action to run: email, activity, notification.

Examples:

- automatic creation of a follow-up task three days after a quotation is sent;
- an automatic welcome email to newly qualified leads;
- an alert to the manager when a high-potential opportunity has been inactive for seven days;
- a follow-up reminder fifteen days after the last activity on an open opportunity.

Tip

Automation should make your salespeople's work easier, not replace it. Use it for the repetitive tasks and the reminders, but keep human interaction at the heart of your sales process.

12.3 CRM analysis and reporting

Powerful analysis tools for steering your sales activity and making informed decisions.

12.3.1 CRM dashboards

Reach the predefined dashboards for an overview of your sales activity:

1. Open **CRM → Reporting → Pipeline**.
2. See the key sales performance indicators.
3. Use the filters to refine the analysis by period, team, salesperson and so on.
4. Switch between views (graph, pivot) according to what you want to analyse.

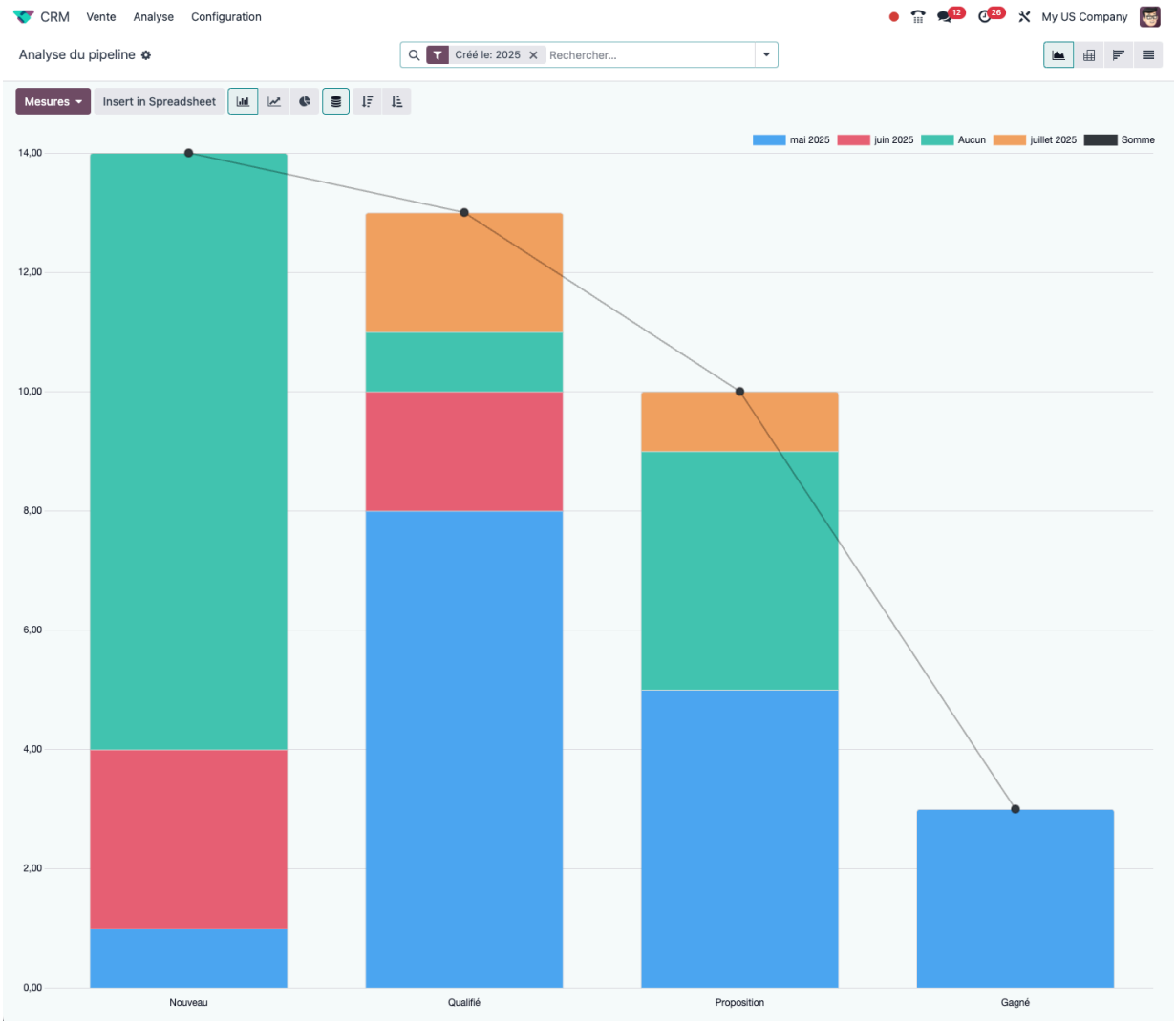


Figure 12.1: The CRM analysis dashboard

12.3.2 Custom reports

Build tailored reports to answer your own needs:

1. Open **CRM → Reporting → Pipeline**.
2. Use the filters and groupings to structure your data.
3. Save your custom report through **Favorites** then **Save current search**.
4. Set the access rights to the report: personal or shared.

Note

Reports can be exported to CSV or XLS for outside use or for further analysis.

12.3.3 Sales targets and follow-up

Set and follow targets to motivate your team and measure performance:

1. Open the targets in the CRM configuration.
2. Create targets by period, team or salesperson.
3. Set target amounts or numbers of opportunities to win.
4. Follow progress on the CRM dashboard.

Targets can be set on various measures:

- turnover to achieve;
- number of opportunities to win;

- target conversion rate;
- number of new customers to acquire.

Following the targets regularly makes it easy to spot gaps early and to put corrective actions in place.

12.4 Integrating marketing with the CRM

Create a synergy between your marketing actions and your sales process, to make customer acquisition as effective as possible.

12.4.1 Handling campaigns

Follow the effectiveness of your marketing actions through the sales process:

1. Create marketing campaigns in the Marketing application.
2. Attach leads and opportunities to the campaign they came from.
3. Analyse the return on investment of each campaign.
4. Identify the acquisition channels that perform best.

12.4.2 Marketing automation

With the Marketing Automation module (Enterprise edition), automate your marketing actions:

1. Build marketing scenarios based on conditions and triggers.
2. Configure automated email sequences, known as drip campaigns.
3. Schedule actions according to the behaviour of the prospects.
4. Nurture your leads until they are ready to buy.

Tip

Marketing automation works particularly well for long sales cycles, which need several points of contact before conversion.

12.5 Advanced CRM configuration

12.5.1 Custom fields

Adapt your CRM to your own needs by adding custom fields:

1. Open **Settings** → **Technical** → **Database Structure** → **Fields**.
2. Select the model to customise: `crm.lead` for opportunities.
3. Create a new field, defining its type and its properties.
4. Add it to the form view through the view editing option.

Examples:

- a lead qualification score, from one to five stars;
- a detailed source: trade show, webinar, referral;
- the prospect's industry;
- the products of interest, as a multiple selection;
- the available budget, as a range of values.

12.5.2 Built-in email templates

Create reusable email templates to standardise your communication:

1. Open **Settings** → **Technical** → **Email** → **Email Templates**.
2. Create a new template for opportunities.
3. Use the dynamic variables to personalise the content.
4. Attach documents where needed.

Note

Email templates can include variables such as the contact's name, the product of interest or the amount of the quotation, for automatic personalisation.

12.5.3 Integration with the other modules

Odoo's CRM integrates naturally with the other modules for a complete experience:

- **Sales**: converting opportunities into quotations and orders.
- **Project**: creating projects from won opportunities.
- **Calendar**: scheduling appointments with two-way synchronisation.
- **Email**: following email exchanges directly on the opportunity.
- **Documents**: centralised handling of the sales documents.

Tip

The native integration between Odoo modules is one of its main strengths: it avoids silos of information and gives a 360-degree view of your customers.

12.6 Good CRM practice

12.6.1 Organising the CRM effectively

To get the most out of your Odoo CRM:

1. define your sales process clearly before configuring the pipeline;
2. keep the number of stages to the essentials, five to seven at most;
3. standardise the information to be collected at each stage;
4. train your teams regularly in good practice;
5. clean obsolete opportunities out of your database periodically.

12.6.2 Measuring performance

Follow the key indicators to improve your sales performance continuously:

- conversion rate by pipeline stage;
- average length of the sales cycle;
- average value of the opportunities;
- sales activity by salesperson;
- win/loss ratio and reasons for losing.

Note

Following those indicators regularly shows where your sales process can be improved and helps you refine your approach.

CHAPTER 13

Accounting and finance

13.1 Introduction to accounting in Odoo

Odoo's Accounting module offers a complete solution for handling every financial aspect of your business, from invoicing through to producing the financial statements.

13.1.1 Overview

Odoo's accounting rests on several key features:

- customer and vendor invoicing;
- handling payments and chasing;
- bank reconciliation;
- analytic accounting;
- taxes and tax returns;
- financial statements and reporting.

Note

Odoo's accounting complies with international accounting standards and is adapted to the local specifics of many countries, France among them.

13.2 Configuring the chart of accounts

13.2.1 Choosing the chart of accounts

During the initial configuration of Odoo:

1. the chart of accounts is configured automatically according to the country selected;
2. for France, the French general chart of accounts is used by default;
3. you can also import a custom chart of accounts.

13.2.2 Customising the accounts

To adapt the chart of accounts to your needs:

1. Open **Accounting → Configuration → Accounting → Chart of Accounts**.
2. Edit the existing accounts or create new ones.
3. Respect the hierarchy of the accounts: class, account, sub-account.
4. Attach the appropriate taxes to the accounts concerned.
5. Set the automatic reconciliation parameters where needed.

13.3 Handling accounting entries

13.3.1 Types of entry

Odoo handles several types of accounting entry:

- sales entries, from customer invoices;
- purchase entries, from vendor bills;
- bank entries, from bank statements;
- cash entries;
- miscellaneous entries, made by hand.

13.3.2 Entering manual entries

To record a manual accounting entry:

1. Open **Accounting → Accounting → Journal Entries**.
2. Click **Create**.

3. Select the appropriate journal.
4. Enter the date and the reference.
5. Add the entry lines, debit and credit.
6. Check that the entry balances.
7. Click **Validate**.

Tip

Use entry templates to speed up the recording of recurring operations, such as payroll entries or depreciation charges.

13.3.3 Validating and changing entries

Once validated, accounting entries are locked, which preserves the integrity of the data:

1. validated entries can no longer be changed directly;
2. to correct a mistake, create a reversing entry;
3. or use the cancel option, which creates the counter-entry automatically.

Note

The principle that accounting entries cannot be altered is respected, in line with legal requirements such as the French anti-fraud VAT law.

13.4 Handling fiscal periods

13.4.1 Configuring the financial years

To define your accounting periods:

1. Open **Settings → Users & Companies → Companies**.
2. Select your company and edit it.
3. In the accounting configuration, set the end dates of the financial year:
   - **Fiscalyear Last Month**: the last month of the year, December by default;
   - **Fiscalyear Last Day**: the last day of the year, 31 by default.
4. Save the changes.

Note

In Odoo there is no separate menu for financial years. The configuration is made on each company, in its accounting settings.

13.4.2 Locking periods

To secure your accounting data:

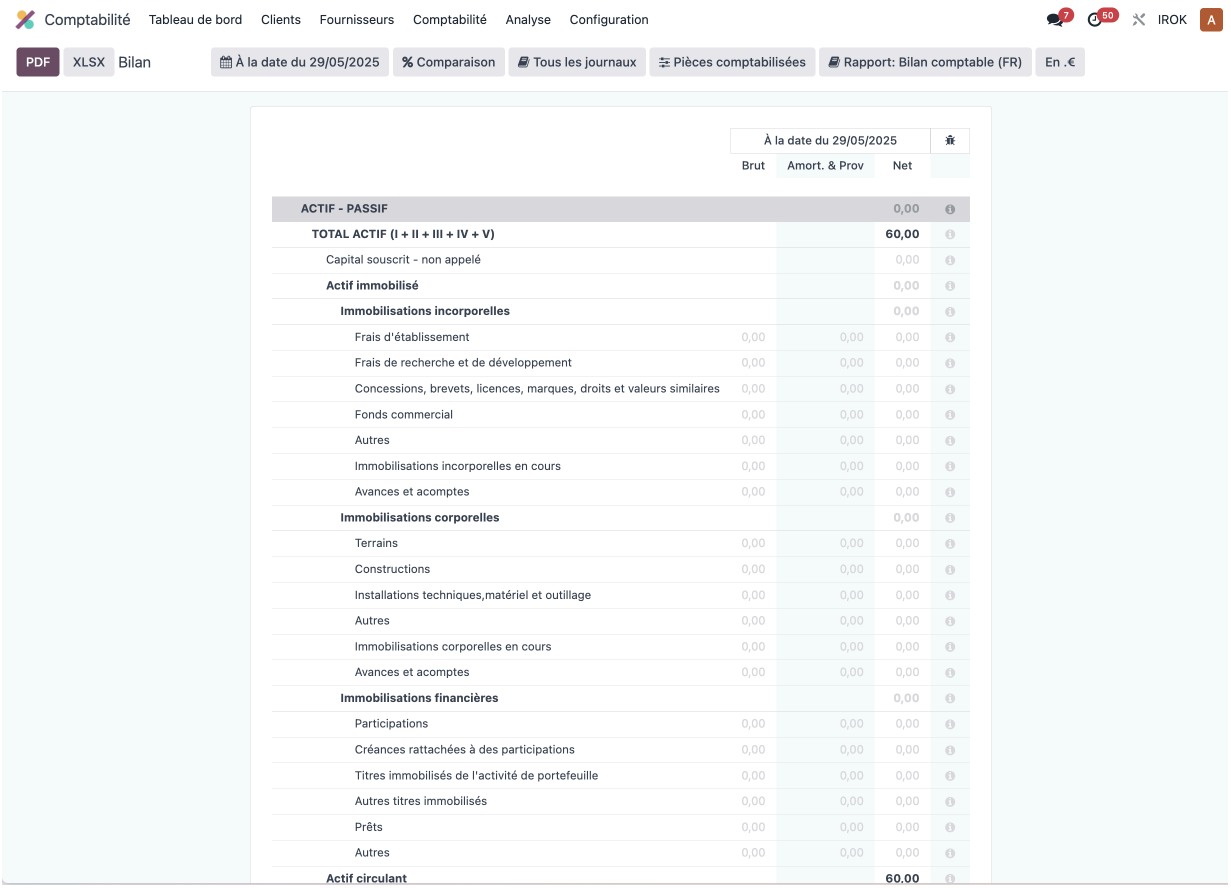
1. lock the accounting periods that are finished, to prevent changes;
2. configure the access rights to control who can reopen a period;
3. use date-based locking for a more flexible arrangement.

13.5 Financial reports

13.5.1 Standard financial statements

Odoo offers many ready-made financial reports:

1. **Balance Sheet**: the financial position at a given date.
2. **Profit and Loss**: financial performance over a period.
3. **General ledger**: the detail of the movements by account.
4. **Trial balance**: the debit and credit balances of every account.
5. **Aged balance**: an analysis of receivables and payables by age.



	À la date du 29/05/2025		
	Brut	Amort. & Prov	Net
ACTIF - PASSIF			0,00
TOTAL ACTIF (I + II + III + IV + V)			**60,00**
Capital souscrit - non appelé			0,00
Actif immobilisé			0,00
Immobilisations incorporelles			0,00
Frais d'établissement	0,00	0,00	0,00
Frais de recherche et de développement	0,00	0,00	0,00
Concessions, brevets, licences, marques, droits et valeurs similaires	0,00	0,00	0,00
Fonds commercial	0,00	0,00	0,00
Autres	0,00	0,00	0,00
Immobilisations incorporelles en cours	0,00	0,00	0,00
Avances et acomptes	0,00	0,00	0,00
Immobilisations corporelles			0,00
Terrains	0,00	0,00	0,00
Constructions	0,00	0,00	0,00
Installations techniques,matériel et outillage	0,00	0,00	0,00
Autres	0,00	0,00	0,00
Immobilisations corporelles en cours	0,00	0,00	0,00
Avances et acomptes	0,00	0,00	0,00
Immobilisations financières			0,00
Participations	0,00	0,00	0,00
Créances rattachées à des participations	0,00	0,00	0,00
Titres immobilisés de l'activité de portefeuille	0,00	0,00	0,00
Autres titres immobilisés	0,00	0,00	0,00
Prêts	0,00	0,00	0,00
Autres	0,00	0,00	0,00
Actif circulant			60,00

Figure 13.1: An example of a financial report

13.5.2 Tax reports

For tax filings:

1. the VAT report for the periodic returns;
2. export of the accounting data in the French FEC format;
3. country-specific tax reports.

Note

The tax reports are updated regularly to stay in line with changes in the law.

13.6 Handling cash

13.6.1 Bank reconciliation

To reconcile your bank transactions:

1. Import your bank statements (CSV, OFX, CODA and other formats).
2. Or enter the transactions by hand.
3. Use the automatic reconciliation feature.
4. Confirm the matches proposed.
5. Create the entries for the transactions not yet recorded.

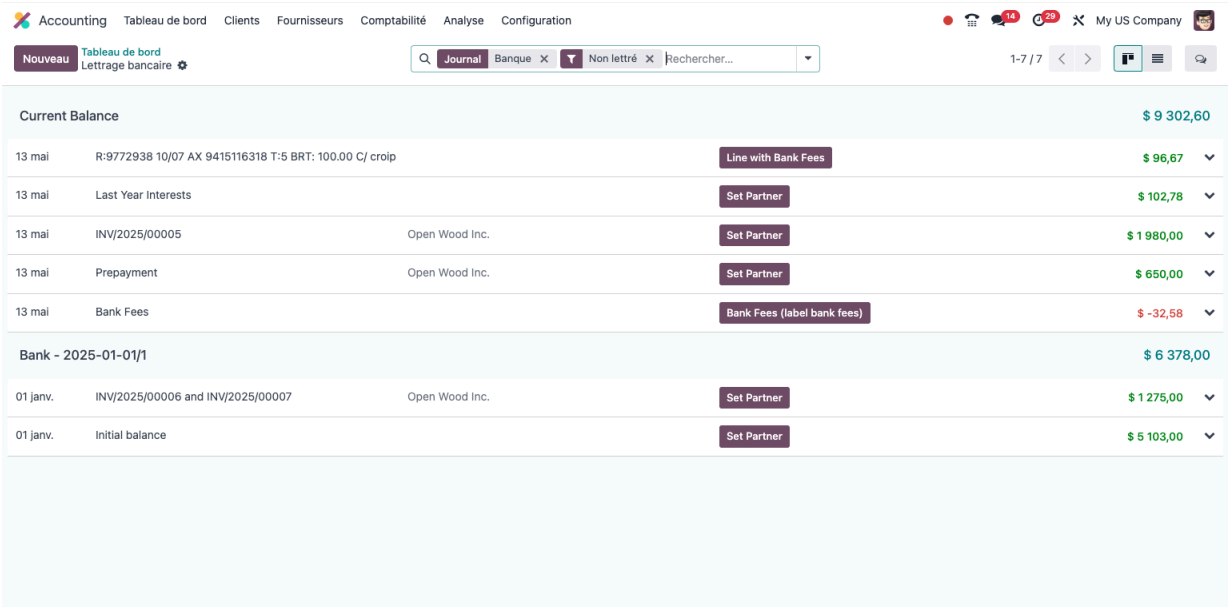


Figure 13.2: The bank reconciliation screen

13.6.2 Cash forecasting

To anticipate your financial flows:

1. Consult the cash forecast report.
2. Analyse the expected receipts and payments.
3. Filter by bank account or by period.
4. Identify the periods of pressure or of surplus cash.

Tip

The accuracy of the cash forecast depends on the due dates being recorded regularly on the customer and vendor invoices.

13.7 Analytic accounting

13.7.1 Configuring the analytic dimensions

To analyse your results by segment of activity:

1. Open **Accounting → Configuration → Analytic Accounting → Analytic Plans**.
2. Create the dimensions that matter: departments, projects and so on.
3. Define the analytic accounts for each dimension.
4. Configure the automatic distribution rules where needed.

13.7.2 Using analytic accounting

To attach analytic dimensions to your transactions:

1. when entering invoices, link the lines to the analytic accounts;
2. for manual entries, complete the analytic information;
3. use entry templates to automate recurring distributions;
4. consult the analytic reports to analyse profitability by segment.

13.8 Multi-company accounting

13.8.1 Multi-company configuration

To handle several legal entities:

1. Create the companies in **Settings → Users & Companies → Companies**.
2. Configure a chart of accounts for each company.

3. Define the consolidation rules where needed.
4. Set the users' access rights company by company.

13.8.2 Inter-company transactions

For transactions between your entities:

1. configure the inter-company accounts;
2. use the inter-company re-invoicing feature;
3. generate the mirror entries automatically;
4. follow the inter-company balances for consolidation.

13.9 Year-end closing

13.9.1 The closing procedure

To finalise an accounting year:

1. Check that every transaction of the year is recorded.
2. Make the inventory and adjustment entries.
3. Produce the final financial statements.
4. Run the year-end closing wizard.
5. Validate the closing entries generated automatically.
6. Lock the year for good.

Note

Year-end closing is a sensitive operation and must be carried out carefully, ideally with the support of your accountant.

13.10 Advanced features

13.10.1 Handling currencies

For businesses working internationally:

1. Configure the currencies used in **Accounting → Configuration → Accounting → Currencies**.
2. Set the exchange rates, or use automatic updating.
3. Record the transactions in their original currency.
4. Consult the reports in the company currency or in foreign currencies.
5. Follow the exchange gains and losses.

13.10.2 Automated invoicing (auto-post)

To automate the generation and validation of recurring invoices:

Note

In Odoo there are no separate "recurring invoice templates". Recurring invoicing uses the auto-post mechanism on draft invoices.

1. Create a draft invoice for the recurring service.
2. Configure auto-posting in the settings of the invoice:
   - enable the auto-post option;
   - set the frequency of automatic generation;
   - configure the conditions for automatic validation.
3. That invoice then serves as the model for the later generations.

Tip

Auto-posting generates and validates similar invoices automatically at the periodicity defined, with no need to create separate templates.

13.11 Integration with the other modules

Odoo's accounting integrates naturally with the other modules, for financial management across the whole business:

- **Sales**: automatic invoicing of sales orders.
- **Purchase**: recording vendor bills tied to orders.
- **Inventory**: valuing stock and the accounting effect of the movements.
- **Project**: following costs and re-invoicing the time spent.
- **Payroll**: generating the accounting entries for salaries.

Note

This native integration avoids double entry and keeps the financial data consistent across the whole business.

CHAPTER 14

Manufacturing

14.1 Introduction to manufacturing in Odoo

Odoo's Manufacturing module lets you run your whole production process, from the design of the products through to making them.

14.1.1 Overview

Manufacturing in Odoo covers several key aspects:

- handling bills of materials;
- planning and carrying out manufacturing orders;
- handling resources: machines, tools, labour;
- following production costs;
- quality control.

Note

The Manufacturing module integrates smoothly with Inventory, Purchase and Sales for complete management of the value chain.

14.2 Initial configuration

14.2.1 Enabling and setting up

To start using the Manufacturing module:

1. Install the module from **Apps**.
2. Open **Manufacturing → Configuration → Settings**.
3. Configure the options to suit your needs:
   - the costing method: standard, average, FIFO and so on;
   - the handling of work units;
   - whether scrap is taken into account;
   - the default scheduling.

14.2.2 Work centres

Work centres represent your production resources:

1. Open **Manufacturing → Configuration → Work Centers**.
2. Create a new centre, stating:
   - its name and description;
   - its capacity and its working hours;
   - its costs: hourly, setup, cleanup;
   - its waiting time and its efficiency.
3. Configure the availability calendars where needed.

Tip

Organise your work centres hierarchically to reflect the structure of your workshop. A department can hold several work centres, for instance.

14.3 Bills of materials and routings

14.3.1 Creating bills of materials

The bill of materials defines the components needed to make a product:

1. Open **Manufacturing** → **Products** → **Bills of Materials**.
2. Click **New**.
3. Select the finished product.
4. Add the components with their quantities.
5. State any by-products.
6. State the production yield.
7. Save the bill of materials.

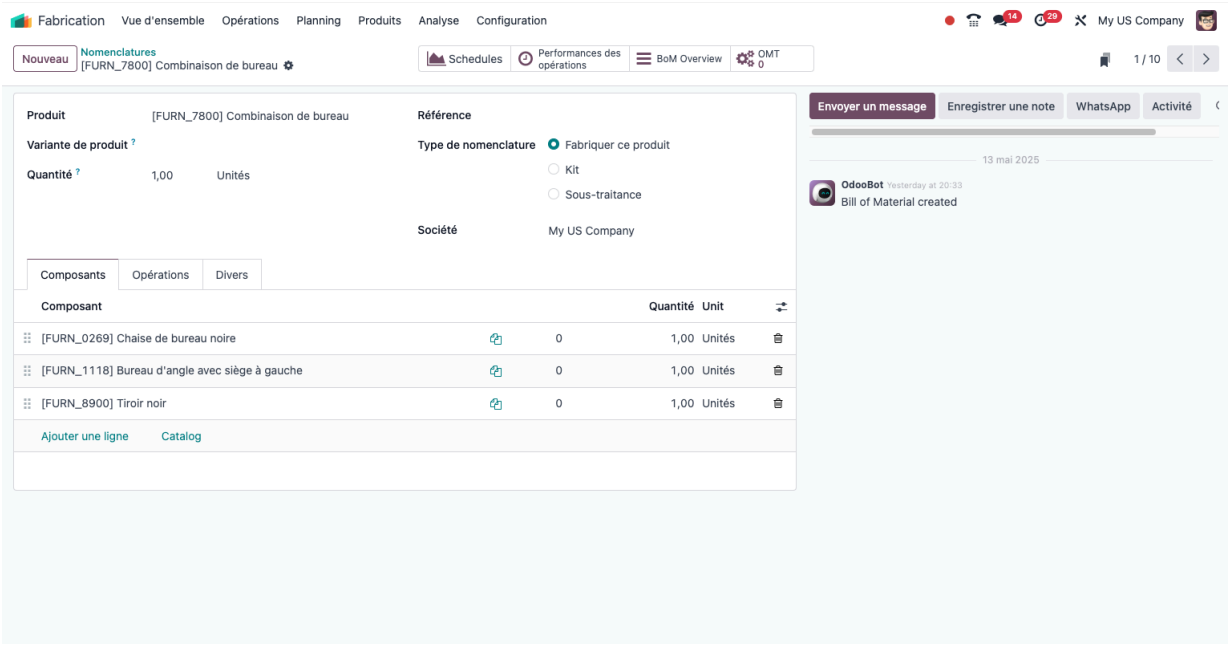


Figure 14.1: An example of a bill of materials

14.3.2 Types of bill of materials

Odoo supports several types of bill of materials:

- **Standard bill of materials**: the list of components needed to produce an item.
- **Variant bill of materials**: suited to products with variants (size, colour and so on).
- **Kit bill of materials**: for products sold as a kit but stored separately.
- **Phantom bill of materials**: for sub-assemblies that never exist physically in stock.

14.3.3 Routings

Routings define the manufacturing steps:

1. Open **Manufacturing** → **Configuration** → **Operations**.
2. Create a new routing.
3. Add the operations in the order they are carried out.
4. For each operation, state:
   - the work centre;
   - the setup and run times;
   - the work instructions;
   - the tools and skills needed.
5. Attach the routing to the matching bill of materials.

Note

Routings are essential for capacity planning and for computing labour costs accurately.

14.4 Manufacturing orders

14.4.1 Creating an order by hand

To launch a production run:

1. Open **Manufacturing** → **Operations** → **Manufacturing Orders**.
2. Click **New**.
3. Select the product to make.
4. State the quantity and the planned date.
5. The bill of materials and the routing are offered automatically.
6. Check the availability of the components.
7. Confirm the order to start production.

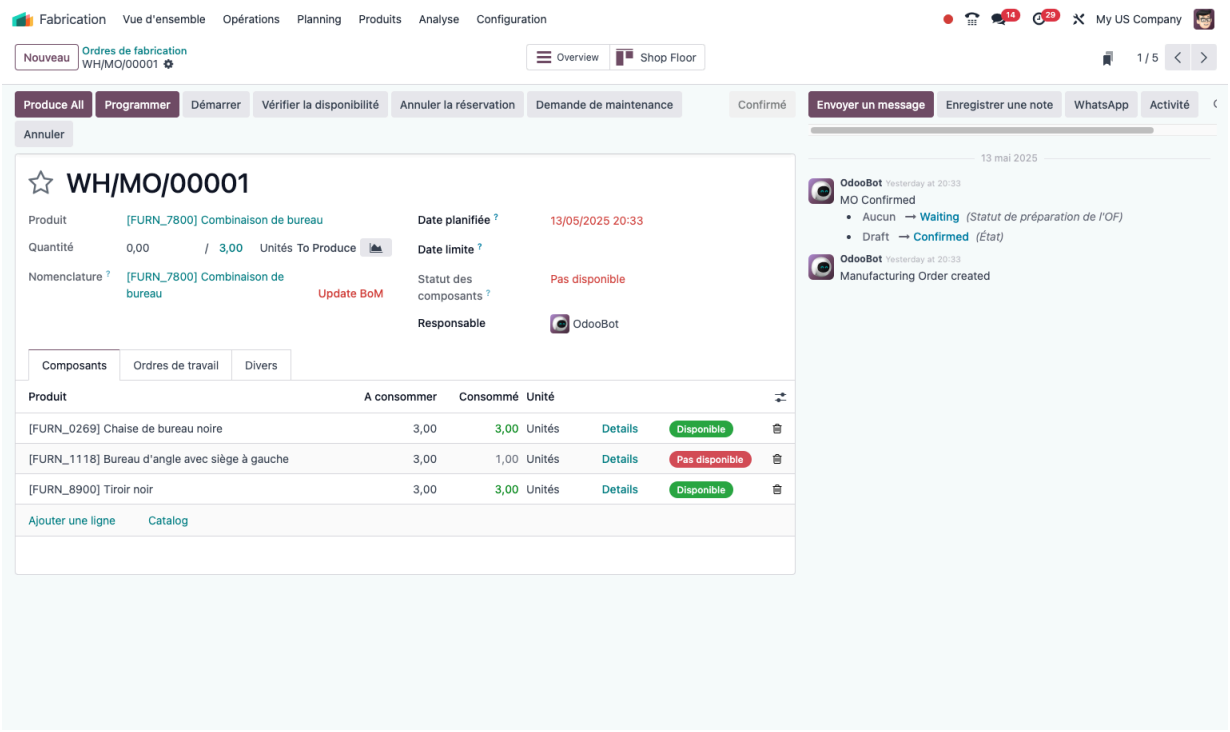


Figure 14.2: An example of a manufacturing order

14.4.2 Generating orders automatically

Manufacturing orders can be generated automatically:

1. from sales orders, for made-to-order products;
2. through the reordering rules, for made-to-stock products;
3. by the MRP scheduler, from the forecasts.

14.4.3 Following and carrying out

To manage the progress of production:

1. Open the manufacturing order.
2. Click to check the availability of the components.
3. Use **Produce** to record the production:
   - confirm or adjust the component consumption;
   - record the time spent on each operation;
   - note the quantities produced and any scrap.
4. For a partial run, produce only part of the quantity.
5. Close the order once production is complete.

Tip

> Use the **Mark as Done** function where you have already made the items and simply want to update the stock.

14.5 Production planning

14.5.1 The MRP scheduler

The MRP (Material Requirements Planning) scheduler computes the production needs:

1. Open the scheduling menu in Manufacturing.
2. Run the computation for a given period.
3. The system analyses:
   - the confirmed sales orders;
   - the current stock levels;
   - the reordering rules;
   - the sales forecasts.
4. Review the suggestions generated.
5. Confirm the manufacturing orders proposed.

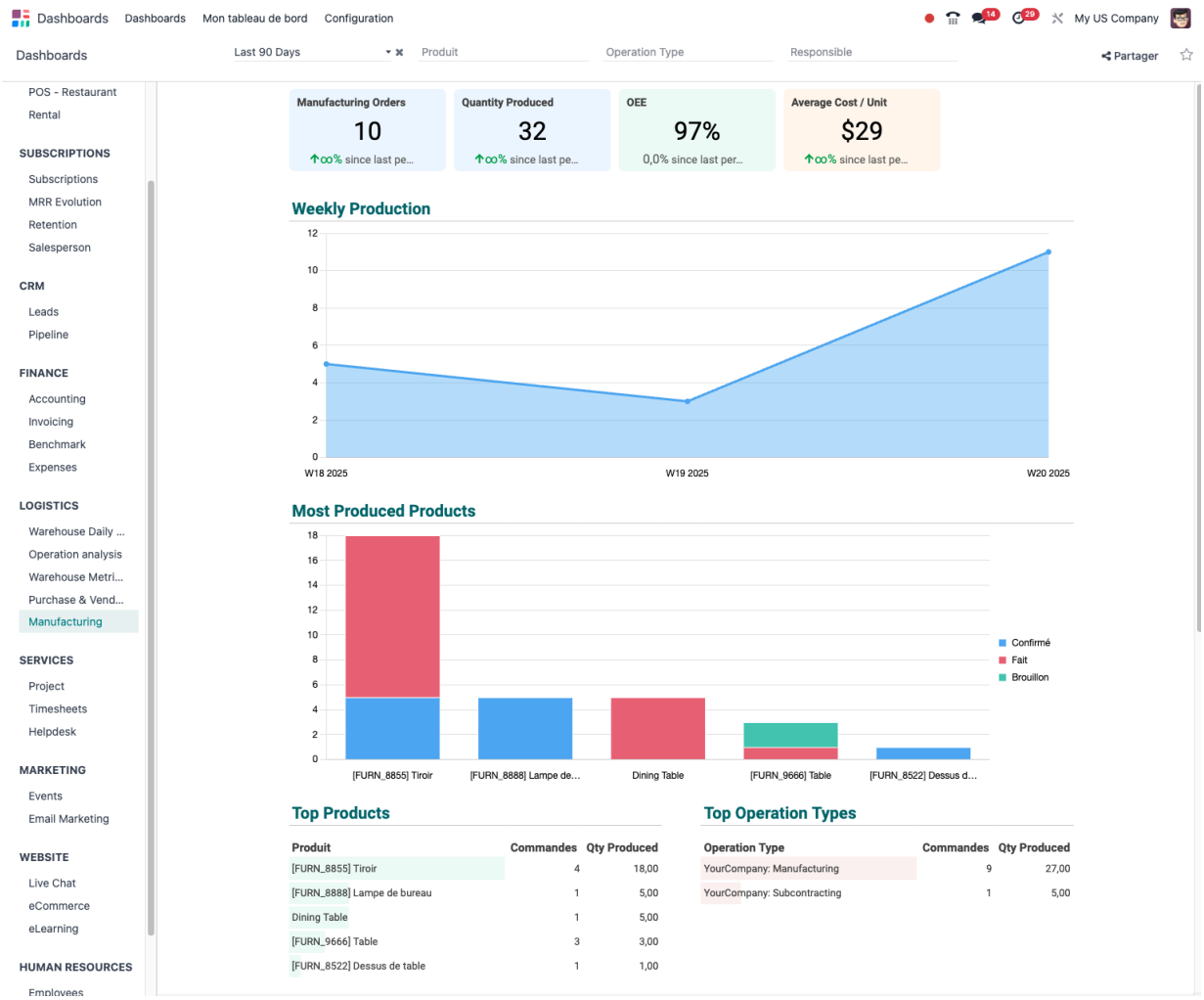


Figure 14.3: The MRP planning dashboard

14.5.2 Capacity planning

To manage the load on your resources:

1. Open the work centre load report in Manufacturing.
2. See the forecast load by centre or by department.

3. Identify the bottlenecks.
4. Adjust the schedules where needed.

Note

Effective capacity planning avoids overloads and makes the best use of your resources.

14.6 Handling production costs

14.6.1 The cost structure

Manufacturing costs in Odoo are made of:

- material costs, that is the components consumed;
- labour costs, based on the operation times;
- machine costs, that is the cost of using the equipment;
- overheads, allocated according to the method defined.

14.6.2 Computing the costs

To establish the standard cost of a manufactured product:

1. Open the product record.
2. Go to the cost information.
3. Run the cost computation.
4. The system computes the cost using:
   - the costs of the components;
   - the hourly rates of the work centres;
   - the operation times defined in the routing.
5. Confirm the cost computed.

Tip

Update the standard costs regularly, so that they reflect changes in raw material prices or in hourly rates.

14.7 Quality in production

14.7.1 Quality checks

With the Quality module enabled, you can:

1. define control points in the manufacturing process;
2. create check forms suited to your products;
3. state the acceptance and rejection criteria;
4. record the results of the checks;
5. follow the conformity rates.

14.7.2 Handling non-conformities

When a quality problem arises:

1. record the non-conformity in the system;
2. decide how to deal with it: rejection, rework, concession;
3. start corrective actions where needed;
4. follow the effect on production costs.

14.8 Equipment maintenance

14.8.1 Integration with maintenance

With the Maintenance module, you can:

1. handle the preventive maintenance of the production equipment;

2. plan the interventions around the production load;
3. follow breakdowns and downtime;
4. compute the performance indicators (MTBF, MTTR).

Note

Well-planned maintenance reduces unplanned stoppages and keeps equipment available.

14.9 Reporting and analysis

14.9.1 Dashboards

Odoo offers several dashboards for following production:

- the main production dashboard;
- the equipment utilisation rate;
- an analysis of production costs;
- performance tracking (overall equipment effectiveness).

14.9.2 Custom reports

You can build specific reports:

1. Open **Manufacturing → Reporting**.
2. Use the filters and groupings available.
3. Save your custom views.
4. Export the data for outside analysis.

Tip

Use the pivot view to analyse your production data along several dimensions: product, period, work centre and so on.

14.10 Advanced features

14.10.1 Subcontracting

To handle subcontracted production:

1. create a specific “subcontracting” operation type;
2. configure the products with a subcontracting bill of materials;
3. the components are sent to the subcontractor on a delivery order;
4. the finished product is received as a standard purchase.

14.10.2 Lot-based production

For industries working in batches:

1. enable lot traceability in the inventory settings;
2. use the lot numbers when consuming and producing;
3. follow the complete genealogy of the finished products;
4. handle lot expiry where needed.

14.10.3 Discrete and continuous production

Odoo adapts to different production modes:

- **Discrete production**: making countable items, with a start and an end to each order.
- **Continuous production**: handling continuous flows with periodic declaration of the quantities.

14.11 Integration with the other modules

The Manufacturing module integrates naturally with:

- **Inventory**: automatic updating of stock.

- **Purchase**: supply of the components.
- **Sales**: make to order.
- **Quality**: quality checks in production.
- **Maintenance**: equipment management.
- **Accounting**: valuing production.
- **PLM**: product lifecycle management (Enterprise).

Note

This native integration keeps the data consistent across the whole system and avoids re-entry.

CHAPTER 15

Project management

15.1 Introduction to project management in Odoo

Odoo's Project module offers a complete solution for planning, running and following your projects, whatever their size or complexity.

15.1.1 Overview

Project management in Odoo covers several key aspects:

- creating and organising projects;
- handling tasks and sub-tasks;
- allocating resources;
- tracking the time spent;
- invoicing projects;
- analysing performance.

Note

The Project module integrates with many other Odoo modules (Sales, CRM, Invoicing, Human Resources and others) for complete project management.

15.2 Configuring the Project module

15.2.1 Enabling and setting up

To start using the Project module:

1. Install the module from **Apps**.
2. Open **Project → Configuration → Settings**.
3. Configure the options to suit your needs:
   - the default invoicing mode;
   - time tracking;
   - tags and stages;
   - integration with the other modules.

15.2.2 Types of project

Odoo can handle several types of project:

- internal projects: research and development, continuous improvement;
- billable customer projects;
- recurring projects: maintenance, support;
- agile projects: Scrum, Kanban.

15.3 Configuring a project

15.3.1 Creating a new project

To create a project in Odoo:

1. Open the Project application and click **New**.
2. State the basic information:
   - the project name;
   - the customer, where applicable;
   - the planned start and end dates;
   - the project manager.
3. Configure the specific settings:

- the invoicing type, where applicable;
- the project stages;
- the visibility: internal, customer, public.

4. Add the members of the project team.
5. Save the project.

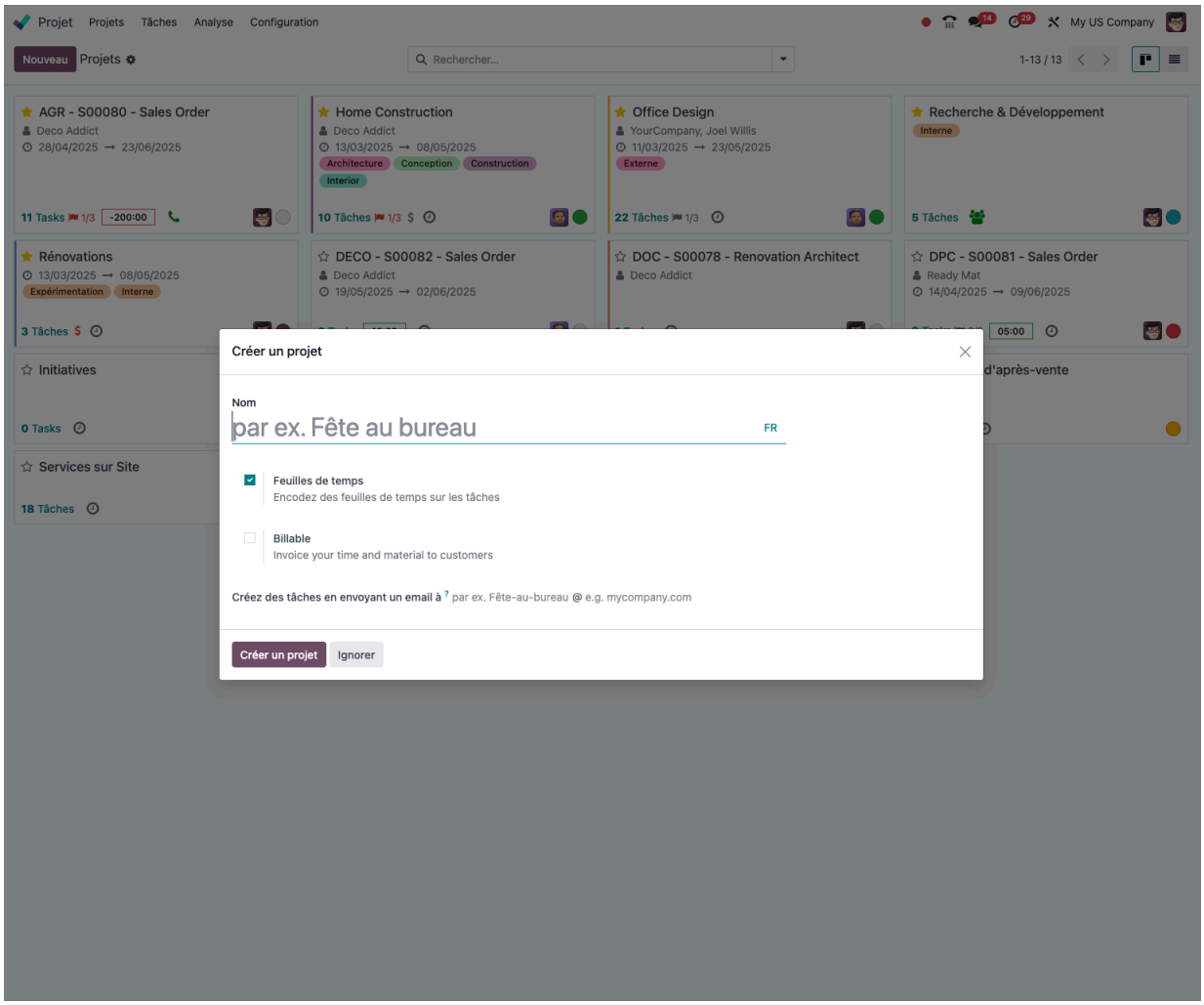


Figure 15.1: The project creation screen

15.3.2 Project stages

Stages structure the life cycle of the tasks:

1. Open **Project → Configuration → Task Stages**.
2. Create the stages your method calls for: To Do, In Progress, Review, Done.
3. Set the options for each stage:
   - the sequence, that is the order of the stages;
   - a colour, for easier reading;
   - the specific options: automatic closing, approval and so on.
4. Assign the stages to the projects concerned.

Tip

Adapt the stages to your project management method. For an agile approach, use stages such as “Backlog”, “Current sprint”, “To test” and “Deployed”.

15.4 Handling tasks

15.4.1 Creating tasks

To create and organise your tasks:

1. Open the project concerned.
2. Click **New**.
3. Fill in the information:
   - the title and the description;
   - the assignee;
   - the due date;
   - the priority;
   - the tags.
4. Add attachments where needed.
5. Create sub-tasks to break the work down.
6. Define the dependencies between tasks.

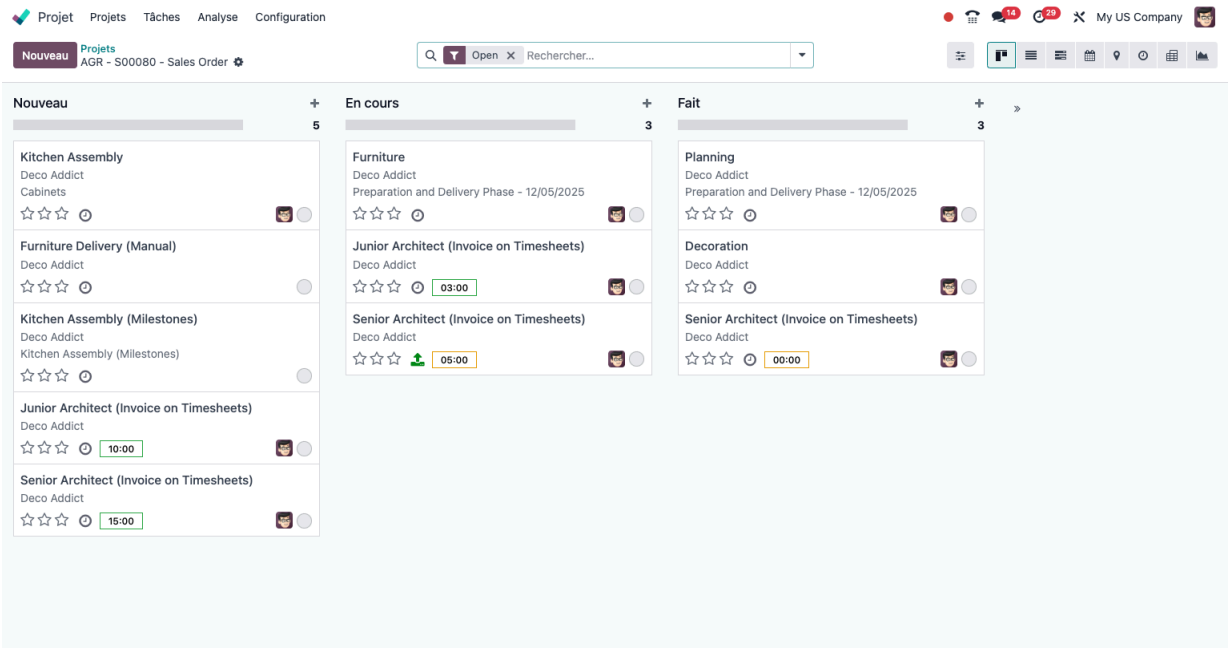


Figure 15.2: The task management screen

15.4.2 Organising the tasks

Several views are available for organising your tasks:

- **Kanban view**: tasks seen by stage.
- **List view**: the full list of tasks, with filtering.
- **Calendar View**: scheduling the tasks in time.
- **Gantt view**: dependencies and the critical path.
- **Pivot view**: multi-dimensional analysis of the tasks.

Note

The Gantt view is available in the Enterprise edition of Odoo and gives an effective picture of the dependencies between tasks and of the overall schedule.

15.5 Tracking time and invoicing

15.5.1 Timesheets

To track the time spent on tasks:

1. Enable time tracking in the project settings.
2. Team members can log their time in two ways:
   - directly from the task, with the start button;
   - through the **Timesheets** module, entering the hours afterwards.
3. Managers can validate the timesheets.
4. The data is then available for analysis and for invoicing.

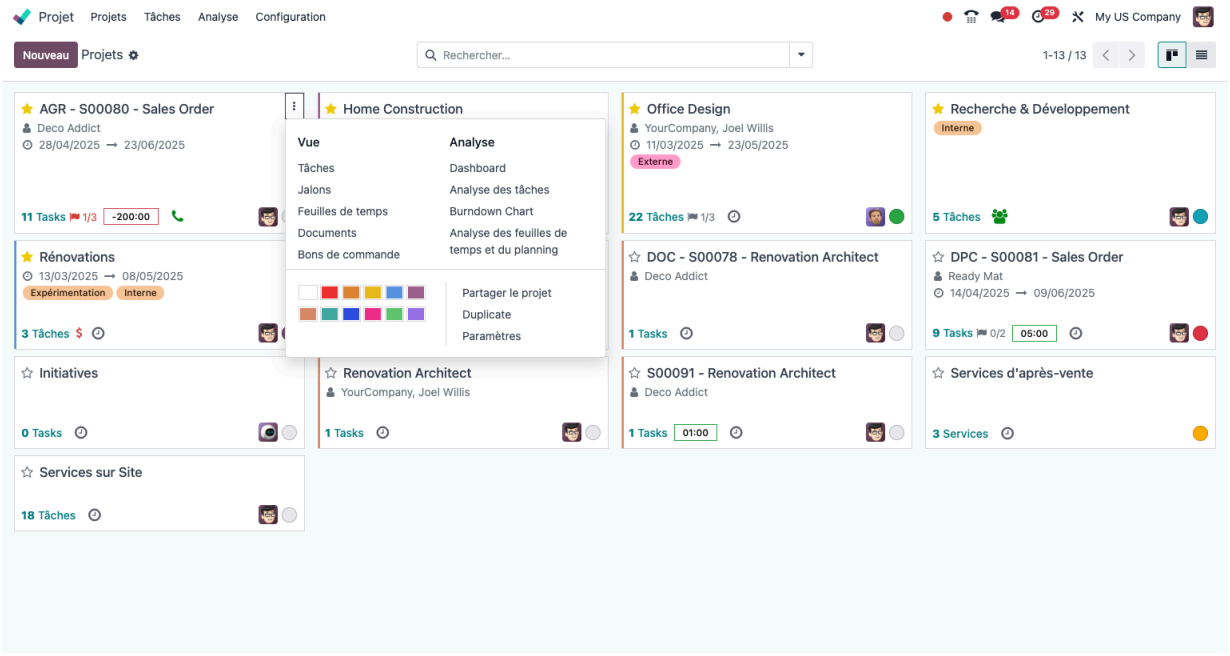


Figure 15.3: Analysing the time spent

15.5.2 Invoicing modes

Odoo offers several invoicing modes for customer projects:

- **Invoicing on time spent**: billing based on the hours logged.
- **Fixed-price invoicing**: a fixed amount for the whole project.
- **Invoicing from the quotation**: billing based on the quotation lines.
- **Subscription invoicing**: recurring billing for continuing services.

Tip

For projects combining several invoicing modes, you can configure specific rules by task or by tag.

15.6 Collaboration and communication

15.6.1 Internal communication

Odoo makes communication within the project team straightforward:

1. use internal comments on the tasks;
2. schedule activities with reminders;
3. share the documents tied to the project;
4. use the built-in instant messaging.

15.6.2 Communication with customers

To involve your customers in following the projects:

1. Enable the customer portal.
2. Give the customer access to their project.
3. The customer can then:
   - follow the progress of the project;

- comment on the tasks;
- approve the deliverables;
- reach the shared documents.

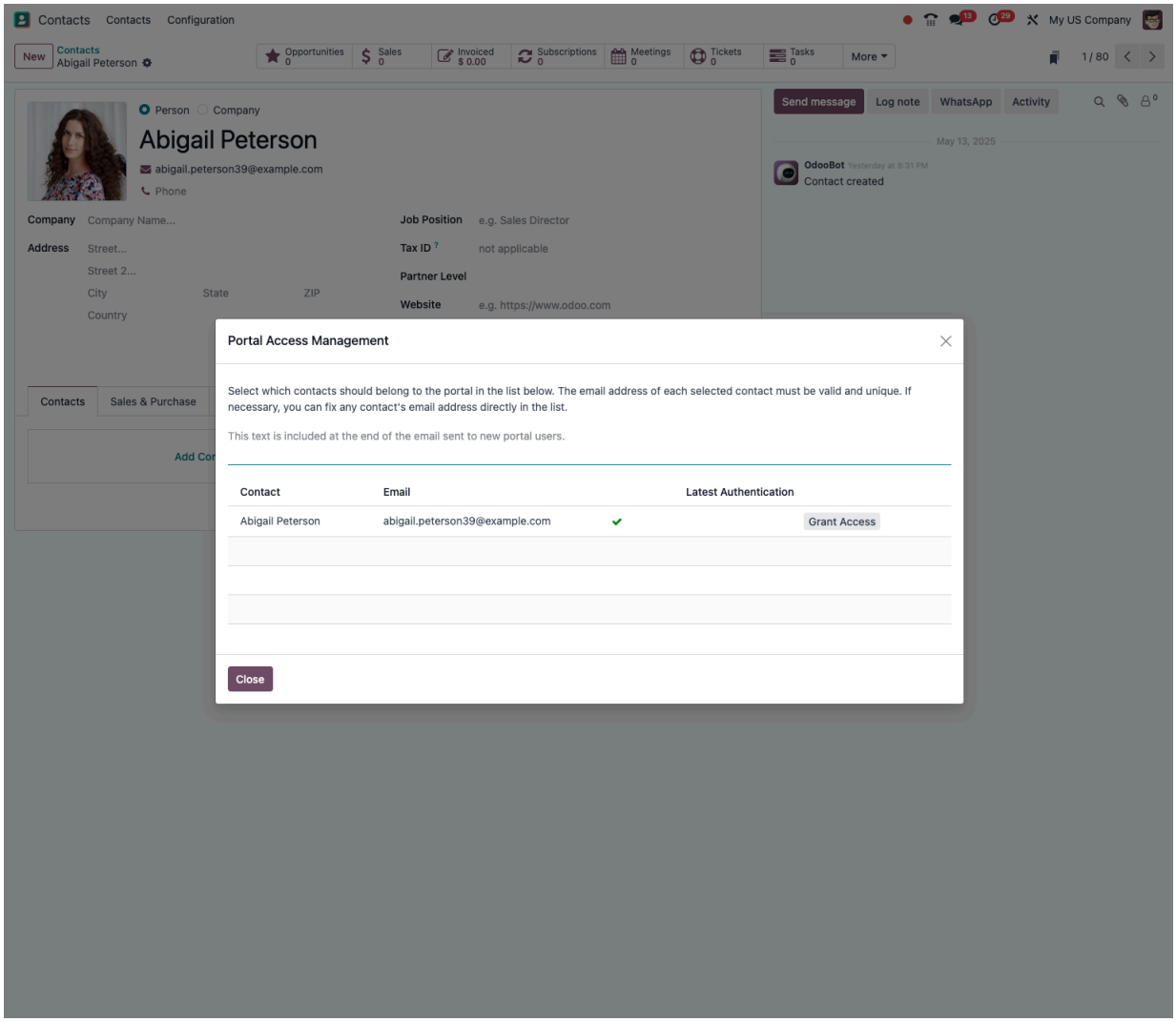


Figure 15.4: Inviting a customer to the portal

15.7 Reporting and analysis

15.7.1 Dashboards

Odoo offers several dashboards for steering your projects:

- an overview of the active projects;
- the workload by user;
- the progress of projects and tasks;
- project profitability.

15.7.2 Custom reports

You can build tailored reports:

1. Open **Project** → **Reporting**.
2. Use the filters and groupings available.
3. Save your custom views.
4. Export the data for outside analysis.

Tip

Use the pivot view to analyse your projects along several dimensions (customer, type of project, manager) and measures (planned against actual hours, profitability).

15.8 Project management methods

15.8.1 The traditional approach

For traditional project management:

1. structure your project into distinct phases;
2. set clear milestones between the phases;
3. use the dependencies between tasks;
4. follow the schedule through the Gantt chart.

15.8.2 The agile approach

For agile project management:

1. configure the stages according to your framework: Backlog, Sprint, Done;
2. use tags for the user stories and the epics;
3. run sprints with the Scrum module (Enterprise);
4. use the kanban view for the daily stand-ups.

Note

The Scrum module in Odoo Enterprise supports the method in full, with handling of the product backlog, the sprints and the burndown charts.

15.9 Advanced features

15.9.1 Project budgeting

To follow the budget of your projects:

1. set a forecast budget;
2. follow the actual costs: time, purchases, expenses;
3. analyse the variances;
4. raise alerts when the budget is exceeded.

15.9.2 Resource management

To make the best use of your resources:

1. see the workload by resource;
2. identify the overloads and the spare capacity;
3. reallocate the tasks where needed;
4. anticipate the resources you will need.

15.9.3 Risk management

With risk management:

1. identify the potential risks;
2. assess their impact and their likelihood;
3. define action plans;
4. follow how the risks develop.

15.10 Integration with the other modules

The Project module integrates naturally with:

- **Sales**: automatic creation of projects from quotations.
- **CRM**: converting opportunities into projects.
- **Human Resources**: handling leave and availability.

- **Purchase**: following the purchases tied to the projects.
- **Expenses**: charging expenses to the projects.
- **Invoicing**: generating the invoices automatically.
- **Documents**: centralised handling of the project documents.

Note

This native integration keeps the data consistent across the whole system and avoids re-entry.

CHAPTER 16

Analysis and reporting

16.1 Introduction to the analysis tools in Odoo

Odoo offers a full set of analysis and reporting tools, which turn your data into information you can act on.

16.1.1 Overview

The analysis features in Odoo fall into several categories:

- customisable dashboards;
- predefined standard reports;
- ad-hoc analysis tools: pivot views, charts;
- custom reports;
- built-in business intelligence.

Note

These analysis tools are available in every Odoo module, with native integration giving a view that cuts across your whole business.

16.2 Dashboards

16.2.1 Built-in dashboards

Odoo offers predefined dashboards for each module:

- the Sales dashboard, for following the pipeline and sales performance;
- the Purchase dashboard, for analysing spending and vendor performance;
- the Accounting dashboard, for seeing the financial health;
- the Inventory dashboard, for watching stock levels;
- the Manufacturing dashboard, for analysing production efficiency;
- the CRM dashboard, for following opportunities and conversions.

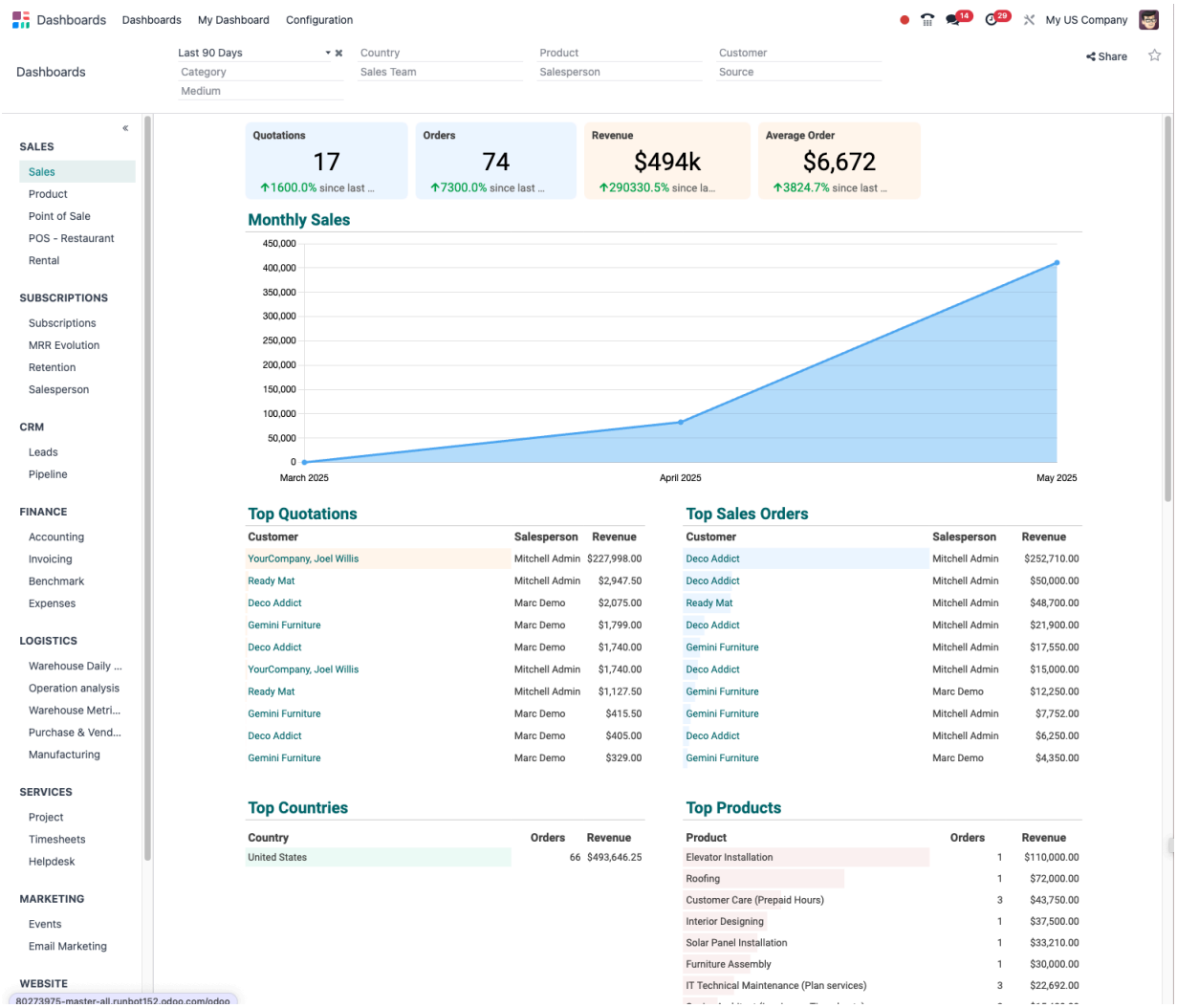


Figure 16.1: The sales dashboard

16.2.2 Building custom dashboards

To build your own dashboard:

1. Open **Dashboards → Configuration → Dashboards**.
2. Click **Create**.
3. Give your dashboard a name.
4. Add widgets:
   - charts: bars, lines, pie;
   - key performance indicators;
   - filtered lists;
   - pivot views.
5. Arrange the widgets as you prefer.
6. Define the filters and the contextual actions.

Tip

Build dashboards by role: an executive dashboard for the management, an operational dashboard for the managers, and specialised dashboards for each department.

16.3 The types of analytical view

16.3.1 Graph view

The graph view lets you see your data as:

- bar charts, horizontal or vertical;
- line charts, with or without a trend line;
- pie and doughnut charts;
- stacked areas;
- scatter plots.

To use it:

1. Open the list view of any data.
2. Click the graph icon at the top right.
3. Select the type of chart.
4. Choose the dimensions: x, y, grouping.
5. Apply the filters you want.
6. Save the view for later use.

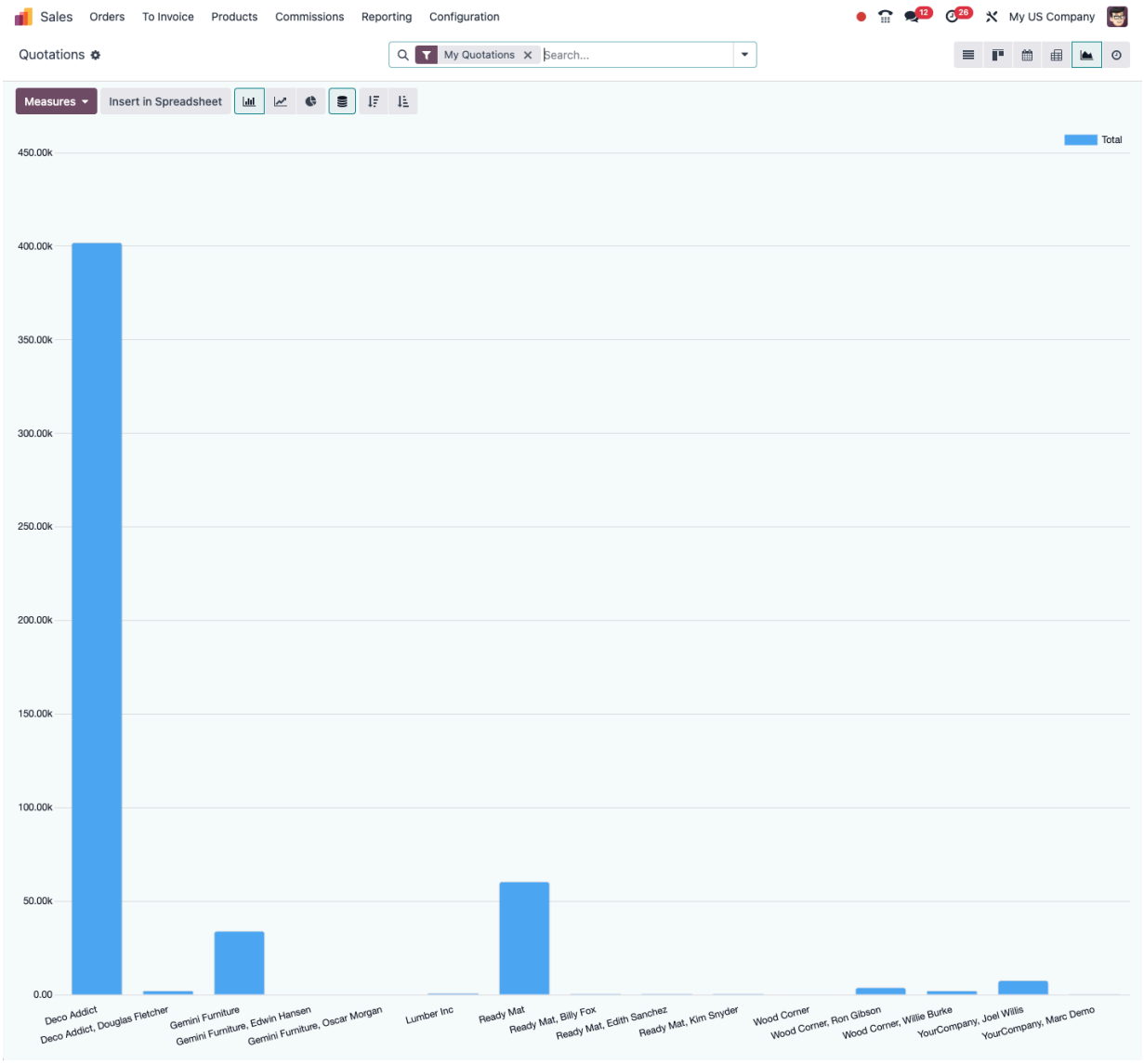


Figure 16.2: An example of a graph analysis

16.3.2 Pivot view

The pivot view is a powerful tool for multi-dimensional analysis:

1. Open the list view of the data to analyse.
2. Click the pivot icon at the top right.
3. Configure the dimensions:

  - rows: product categories, customers and so on;
  - columns: periods, salespeople and so on;
  - measures: amount, quantity, margin and so on.
4. Expand or collapse the hierarchy levels.
5. Sort and filter to suit your needs.
6. Export the results to Excel for deeper analysis.

Note

The pivot view is particularly useful for analysing trends, comparing performance and spotting anomalies in large sets of data.

16.3.3 Cohort view

The cohort view, available in Odoo Enterprise, analyses customer retention and behaviour over time:

1. Open the customer or subscription data.
2. Select the cohort view.
3. Define the period of analysis: month, quarter, year.
4. Watch how the cohorts develop over time.
5. Identify the retention or churn trends.

Tip

Use the cohort view to analyse the effectiveness of your loyalty programmes, the lifetime of subscriptions or the effect of new features on retention.

16.4 Standard reports

16.4.1 Financial reports

Odoo offers a complete range of financial reports:

- balance sheet;
- profit and loss;
- trial balance;
- general ledger;
- aged receivable and aged payable;
- tax reports (VAT);
- cash analysis.

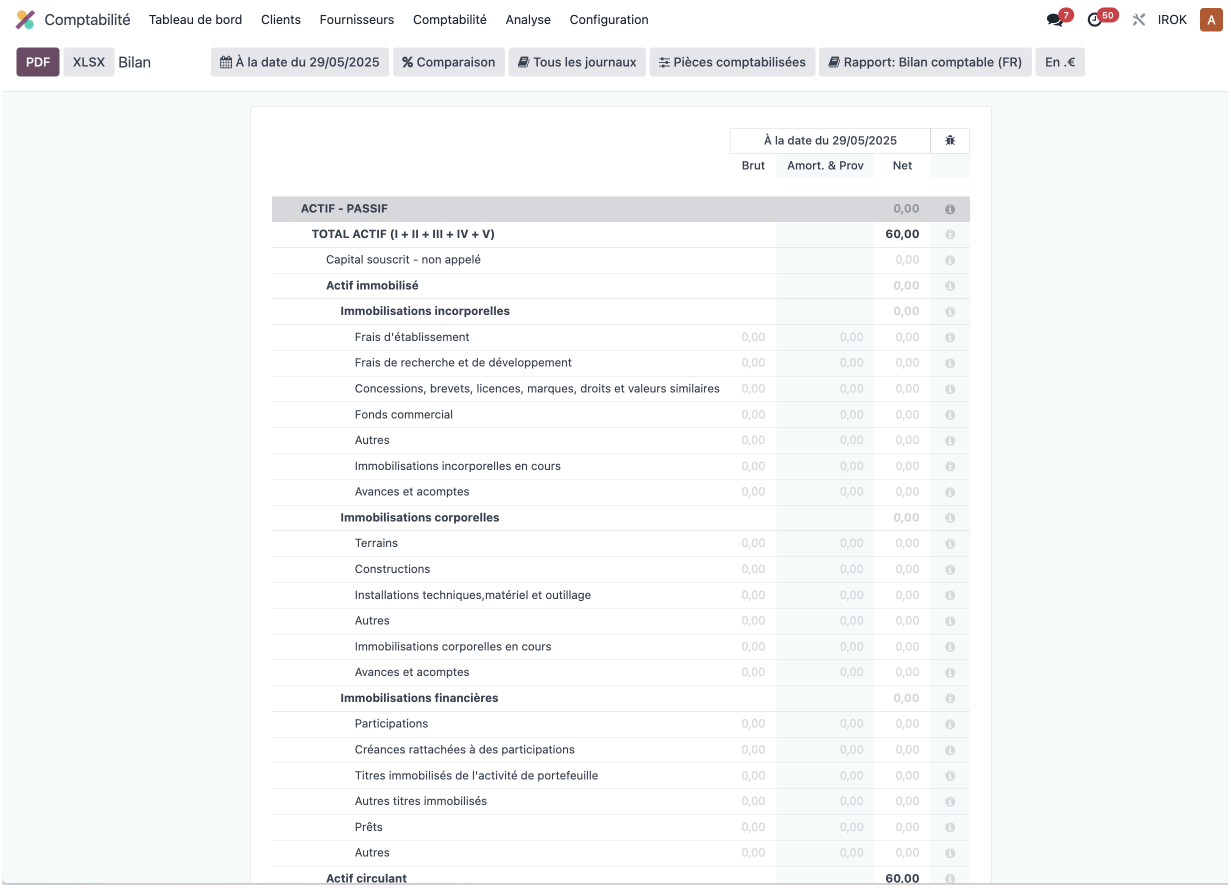


Figure 16.3: An example of a financial report

16.4.2 Sales reports

To analyse your sales activity:

- sales analysis by product, category or customer;
- sales performance by salesperson or team;
- analysis of the sales pipeline;
- sales forecasts;
- margin and profitability reports.

16.4.3 Inventory reports

To run your stock effectively:

- stock valuation;
- stock moves;
- supply forecasts;
- stock age;
- ABC analysis, that is the classification of the products;
- stock turnover.

16.4.4 Production reports

To analyse your manufacturing processes:

- production costs;
- overall equipment effectiveness;
- capacity analysis;
- quality performance;
- scrap rate.

16.5 Building custom reports

16.5.1 QWeb reports

To build highly customised reports, for advanced users:

1. Open **Settings → Technical → Reporting → Reports**.
2. Create a new report template.
3. Use the QWeb language to define the structure.
4. Add Python expressions for the business logic.
5. Customise the layout and the styling.
6. Attach the report to the data models concerned.

Note

Building QWeb reports calls for technical knowledge of XML, HTML and Python. Less technical users are better served by custom views or by the export tools.

16.5.2 Custom views

To build custom analyses with no programming:

1. Open the list view of the data to analyse.
2. Apply the filters you want.
3. Choose the appropriate view: list, graph, pivot.
4. Click **Favorites** then **Save current search**.
5. Give your custom view a name.
6. Decide whether it is to be shared with other users.
7. Add it to your dashboard where useful.

16.6 Exports and integration

16.6.1 Exporting data

To analyse your data in outside tools:

1. Open the list view of the data to export.
2. Click **Action** then **Export**.
3. Select the fields to export.
4. Choose the format: CSV or Excel.
5. Click **Export**.
6. Open the file in your preferred analysis tool.

Tip

Save your export formats so you can reuse them easily for your periodic analyses.

16.6.2 Business intelligence integration

For advanced analysis with business intelligence tools:

1. Connect your BI tool (Power BI, Tableau, Qlik) to Odoo's PostgreSQL database.
2. Build data models in your BI tool.
3. Build advanced dashboards.
4. Configure automatic refreshes.

Note

Direct integration with BI tools generally calls for a system administrator to configure database access following good security practice.

16.7 Alerts and automation

16.7.1 Condition-based alerts

To be told proactively about situations that matter:

1. Open **Settings** → **Technical** → **Automation** → **Automation Rules**.
2. Create a new automated action.
3. Define the trigger conditions.
4. Configure the action: email, internal notification and so on.
5. Enable the alert.

Tip

Set alerts for the critical situations: stock below the minimum threshold, high-value opportunities with no recent activity, customers approaching their credit limit.

16.7.2 Scheduled reports

To receive regular reports automatically:

1. Build and save your custom report.
2. Open **Settings** → **Technical** → **Automation** → **Scheduled Actions**.
3. Create a new scheduled action.
4. Configure the periodicity: daily, weekly, monthly.
5. Define the action that produces and sends the report.
6. State the recipients.

16.8 Good practice in analysis

16.8.1 Structuring the data

For effective analysis:

- make sure your data is correctly categorised;
- use labels and tags consistently;
- keep the data clean and up to date;
- define a clear hierarchy for the analytic items.

16.8.2 Designing dashboards

For effective dashboards:

- keep to the indicators that genuinely matter;
- organise the information logically, from the general to the particular;
- use visualisations suited to the type of data;
- include comparisons: previous period, targets;
- allow drill-down, so the detail can be explored.

Tip

Follow the “3-5-9” rule: a dashboard should hold no more than 3 critical indicators, 5 important performance indicators and 9 detail metrics.

16.8.3 Reading the reports

To get the most out of your analyses:

- look for trends rather than absolute values;
- identify the correlations between different measures;
- analyse the gaps against forecasts or targets;
- dig into the detail to understand the causes;
- use the analyses to form hypotheses you can then test.

16.9 Advanced features (Odoo Enterprise)

16.9.1 Odoo Studio

With Odoo Studio, available in the Enterprise edition:

1. create computed fields for your analyses;
2. customise the views with no technical knowledge;
3. add custom filters and groupings;
4. build tailored reports through a visual interface.

16.9.2 Odoo Spreadsheet

With Odoo Spreadsheet, available in the Enterprise edition:

1. create spreadsheets directly inside Odoo;
2. pull in real-time data from your system;
3. share the analyses and work on them together;
4. embed the sheets in your dashboards.

Note

Odoo Spreadsheet combines the flexibility of a spreadsheet with the live data of your system, which gives the best of both worlds for your analyses.

CHAPTER 17

Workflows and automation

17.1 Introduction to automation in Odoo

Automating processes in Odoo raises operational efficiency: it reduces manual tasks, keeps processes consistent and frees time for work of higher value.

17.1.1 The types of automation available

Odoo offers several complementary automation mechanisms:

- automated actions: triggering actions when conditions are met;
- scheduled actions: running actions on a calendar;
- workflows: sequencing the steps of a process;
- alert rules: notifications based on conditions;
- email and SMS templates: automated communication;
- marketing automation (Enterprise edition).

Note

These tools can be combined to build complex automations suited to your own business processes.

17.2 Automated actions

17.2.1 The principle

Automated actions run an action when a particular event occurs and certain conditions are met:

1. Open **Settings** → **Technical** → **Automation** → **Automation Rules**.
2. Create a new rule.
3. Set the basic parameters:
   - a descriptive name;
   - the model concerned: contacts, invoices, orders and so on;
   - the type of trigger: creation, update, periodic and so on.
4. Configure the conditions under which it applies, through filters.
5. Define the action to run.
6. Enable the automation.

The triggers available are:

- **On creation**: the action runs when a new record is created.
- **On update**: the action runs when a record is changed.
- **On creation and update**: combines the two previous triggers.
- **On archive and unarchive**: the action runs when a record changes state.
- **Time-based**: the action runs after a delay or on a given date.
- **Based on a Python expression**: for advanced custom triggers.

17.2.2 The types of action available

Automated actions can carry out various operations:

- sending an email or an SMS;
- creating, updating or deleting records;
- running a Python method;
- adding followers to a document;
- creating an activity, that is a task to carry out;
- sending an internal notification to users.

Tip

For complex automations, you can chain several automated actions that fire in cascade.

17.2.3 Examples of use

Automated actions serve many scenarios:

- sending a welcome email to every new customer;
- creating an approval task when an order exceeds a given amount;
- categorising products automatically against certain criteria;
- updating the sales prices when the purchase cost changes;
- notifying the sales manager of high-value opportunities;
- creating a down payment invoice automatically when an order is confirmed.

17.3 Scheduled actions

17.3.1 Configuring periodic actions

Scheduled actions run operations at regular intervals:

1. Open **Settings → Technical → Automation → Scheduled Actions**.
2. Create a new scheduled action.
3. Configure the parameters:
   - a descriptive name;
   - the model concerned;
   - the Python method to run;
   - the frequency: daily, weekly and so on;
   - the next execution date.
4. Enable the scheduled action.

Note

Scheduled actions are run by Odoo's task scheduler (cron). Make sure the cron service is properly configured on your server, so they run as they should.

17.3.2 Common uses

Scheduled actions are particularly useful for:

- generating recurring invoices;
- sending periodic reports;
- running month-end computations;
- synchronising data with outside systems;
- cleaning up or archiving old data;
- running replenishment computations;
- sending alerts about contracts or subscriptions approaching their end.

17.4 Notification rules

17.4.1 Configuring a notification

The same mechanism serves to notify users when certain conditions are met. The rule is built in the same place, with a notification as its action:

1. Open **Settings → Technical → Automation → Automation Rules**.
2. Create a new rule on the model concerned.
3. Define the conditions under which it applies.
4. Choose the action **Send Email**, **Send SMS** or **Create Activity**.
5. State the recipients: users, teams or followers of the document.
6. Enable the rule.

17.4.2 Typical use cases

Notification rules are particularly useful for:

- alerting on low stock;
- notifying late payments;
- flagging significant margin variances;
- alerting on blocked orders;
- notifying the creation of high-potential prospects;
- reporting new customers arriving in a strategic segment.

17.5 Communication templates

17.5.1 Email templates

Email templates standardise and automate your communications:

1. Open **Settings → Technical → Email → Email Templates**.
2. Create a new template.
3. Configure the elements:
   - the name of the template;
   - the data model it applies to;
   - the subject of the email;
   - the body of the message, with dynamic variables;
   - the default attachments;
   - the sender and the recipients.
4. Use variables to personalise the content.
5. Test the template before using it in production.

Tip

Use the `object.field_name` syntax to insert dynamic variables into your email templates. For instance `object.name` displays the name of the contact.

17.5.2 Automating communications

To automate the sending of communications:

1. create email templates for each type of communication;
2. attach them to automated or scheduled actions;
3. configure the conditions for sending;
4. for business processes, build the sending into the workflows.

Examples:

- a confirmation email when an order is created;
- a payment reminder for overdue invoices;
- a delivery notification with the tracking information;
- a request for feedback after a product or service is delivered;
- contract renewal alerts;
- targeted marketing communications.

17.6 Custom workflows

17.6.1 Designing workflows

To design an effective workflow:

1. identify clearly the process to automate;
2. list every step of the process;
3. determine the conditions for moving from one step to the next;
4. define the actions to run at each transition;

5. identify the roles and responsibilities;
6. document the workflow for future reference.

Note

Modelling your flow beforehand on paper or with a diagramming tool is strongly recommended, before implementing it in Odoo.

17.6.2 Implementing it in Odoo

In Odoo, workflows are generally implemented by combining:

1. the states and stages of the document, that is the statuses in its life cycle;
2. tracking fields: dates, responsible users, priorities;
3. automated actions for the transitions;
4. access rights to control who can approve each step;
5. notifications and activities for the human follow-up.

An example, for an expense claim:

1. the employee creates an expense claim (status: draft);
2. an automated action notifies the manager for approval;
3. the manager reviews and approves (status: approved);
4. an automated action creates a task for the accounting department;
5. the accountant checks the receipts and validates (status: validated);
6. an automated action generates the payment;
7. the treasurer makes the payment (status: paid);
8. an automated action notifies the employee and closes the file.

17.7 Advanced automation

17.7.1 Odoo Studio (Enterprise)

With Odoo Studio, in the Enterprise edition, you can build automations with no code:

1. add computed fields with formulas;
2. create actions at interface level;
3. customise the views and the processes;
4. add custom action buttons;
5. change the existing workflows.

17.7.2 Specific development

For highly specific automations:

1. develop custom modules;
2. write bespoke Python methods;
3. implement custom triggers;
4. interface Odoo with outside systems;
5. use the Odoo API for advanced integrations.

Note

Specific development calls for technical skills in Python and a sound understanding of the Odoo framework. It should be carried out by experienced developers.

17.8 Outside integrations

17.8.1 API and web services

Odoo can integrate with outside systems through:

1. a REST API (JSON-RPC);

2. an XML-RPC API;
3. webhooks for outgoing events;
4. specific connectors for third-party applications.

Examples:

- synchronising with an outside e-commerce site;
- integration with payment systems;
- connecting to business intelligence tools;
- exchanging data with specialised business software;
- interfacing with electronic data interchange systems;
- synchronising with custom mobile applications.

17.8.2 Ready-made connectors

Odoo offers connectors for many third-party services:

- payment gateways (PayPal, Stripe, Adyen and others);
- delivery services (UPS, FedEx, DHL and others);
- marketplaces (Amazon, eBay and others);
- content management systems (WordPress, Shopify and others);
- communication tools (MailChimp, Twilio and others);
- social platforms.

Tip

Check the Odoo App Store for ready-made connectors before developing your own integration.

17.9 Good practice in automation

17.9.1 A methodical approach

To make a success of your automation projects:

1. start by mapping your current processes;
2. identify the inefficiencies and the bottlenecks;
3. prioritise the automations by their impact and their complexity;
4. proceed in stages, starting with the simple cases;
5. test each automation carefully before going live;
6. train the users on the new processes;
7. measure the results and adjust where needed.

17.9.2 Pitfalls to avoid

A few common mistakes to avoid:

- over-automating processes that call for human judgement;
- building automations so complex they are hard to maintain;
- neglecting to document the automations put in place;
- implementing contradictory rules that interfere with one another;
- ignoring user training on the new processes;
- neglecting to test edge cases and exceptions.

Note

Build notification and follow-up mechanisms into your automations, so you can step in quickly when something goes wrong.

17.9.3 Monitoring and maintenance

To keep your automations working over time:

1. put logging in place for the automated actions;

2. review the logs regularly to spot anomalies;
3. create alerts for automation failures;
4. update the automations when the processes change;
5. document every automation to make maintenance easier;
6. adjust the automations in the light of user feedback.

Tip

Name an owner for each critical automation, responsible for watching it and keeping it working.

CHAPTER 18

Keyboard shortcuts

18.1 Odoo's official keyboard shortcuts

Here are the main keyboard shortcuts officially supported by Odoo. They may vary with the version, the browser or any custom modules.

Windows / Linux	macOS	Action
`Ctrl` + `B`	`Alt` + `B`	Previous breadcrumb
`Ctrl` + `C`	`Alt` + `C`	Create a new record
`Ctrl` + `H`	`Alt` + `H`	Odoo home
`Ctrl` + `J`	`Alt` + `J`	Discard the changes
`Ctrl` + `S`	`Alt` + `S`	Save
`Ctrl` + `N`	`Alt` + `N`	Next page
`Ctrl` + `P`	`Alt` + `P`	Previous page
`Ctrl` + `Q`	`Alt` + `Q`	Search
`Ctrl` + `1–9`	`Alt` + `1–9`	Select the menus
`Ctrl` + `Shift` + `T`	`Alt` + `Shift` + `T`	Create a new to-do
`Ctrl` + `F`	`Alt` + `F`	Search for a Knowledge article
`Ctrl` + `Shift` + `S`	`Alt` + `Shift` + `S`	Share a Knowledge article
`Ctrl` + `K`	`Cmd` + `K`	Open the command palette

18.2 In the command palette

Once the palette is opened with `Ctrl` + `K` (or `Cmd` + `K` on a Mac):

Input	Effect
`/`	Search the menus, applications and modules
`@`	Search for users
`#`	Search the Discuss channels
`?`	Search the Knowledge articles
`Ctrl` + `Enter`	Open the selection in a new tab

Note

Holding down `Ctrl` (or `Cmd` on a Mac) displays the shortcuts on the Odoo interface. Some shortcuts may vary with the version, the browser or the local configuration.

CHAPTER 19

Frequently asked questions

19.1 General questions

19.1.1 What is the difference between Odoo Community and Odoo Enterprise?

- **Odoo Community Edition**: the free open-source edition with the core features. You can install and use it freely.
- **Odoo Enterprise Edition**: the paid subscription edition, which adds advanced features, official support, guaranteed updates and extra modules such as Studio, electronic signature and leave management.

19.1.2 How do I upgrade Odoo to a new version?

Upgrading Odoo generally takes the following steps:

1. a full backup of the database and of the files;
2. testing the migration on a pre-production environment;
3. installing the new version;
4. migrating the data with the tools provided;
5. checking that the custom modules are compatible;
6. full testing before going live.

Note

Calling on an Odoo partner (such as IROKOO) for major migrations is strongly recommended, since they can be complex and may call for specific adaptations.

19.1.3 Is Odoo compatible with mobile devices?

Yes, in several ways:

- a responsive web interface that adapts to tablets and smartphones;
- dedicated mobile applications for iOS and Android;
- a progressive web app, for an experience close to a native application.

19.1.4 How do I customise the reports in Odoo?

Odoo offers several levels of report customisation:

1. **Basic**: changing the logo and the company information.
2. **Intermediate**: using Odoo Studio (Enterprise) to change the existing reports.
3. **Advanced**: building custom reports with QWeb, the XML template language.

19.1.5 How do I add custom fields?

To add custom fields in Odoo:

1. **With Odoo Enterprise**: use Studio to add fields with no programming.
2. **Without Studio**: open **Settings** → **Technical** → **Database Structure** → **Fields** and create a new field.
3. **For complex needs**: develop a custom module that adds the fields required.

19.2 Technical questions

19.2.1 How do I improve Odoo's performance?

Several things help:

- configuring the server with enough resources (CPU, RAM);
- tuning the PostgreSQL database;
- using a dedicated web server (Nginx, Apache);

- configuring a caching system;
- archiving old data regularly;
- indexing the fields that are searched often.

19.2.2 How do I back up my Odoo database?

Odoo offers several backup methods:

1. through the web interface, in the database manager;
2. using the `pg_dump` command-line tool;
3. configuring scheduled automatic backups;
4. third-party backup services for Odoo.

Tip

Test restoring your backups regularly, to be sure they work. An untested backup is not a reliable one.

19.2.3 How do I install an additional module?

To install an additional module:

1. Open **Apps**.
2. Clear the “Apps” filter to see every module.
3. Search for the module you want.
4. Click **Install**.
5. For outside modules, place them in the addons folder before installing.

19.2.4 How do I configure email sending in Odoo?

To configure email sending:

1. Open **Settings** → **Technical** → **Email** → **Outgoing Mail Servers**.
2. Create a new server with the SMTP settings of your provider.
3. Configure the authentication and security options.
4. Test by sending an email.
5. Set that server as the default one where needed.

19.3 Functional questions

19.3.1 How do I configure taxes in Odoo?

To configure the taxes:

1. Open **Accounting** → **Configuration** → **Accounting** → **Taxes**.
2. Create or edit the taxes to suit your needs.
3. Configure the rate, the computation method and the accounts.
4. Attach the taxes to the products or to the product categories.
5. Configure the fiscal positions for particular customers.

19.3.2 How do I handle user access rights?

Access rights are handled at several levels:

1. creating user profiles with predefined sets of rights;
2. assigning specific security groups as the need arises;
3. configuring access rules at record level;
4. defining access rules at field level;
5. assigning the companies, in a multi-company setup.

Note

Always follow the principle of least privilege: grant each user only the minimum rights they need to do their work.

19.3.3 How do I handle several entities or companies in Odoo?

Odoo can handle several legal entities:

1. Enable the multi-company feature in the settings.
2. Create the companies, each with its own settings.
3. Configure the data specific to each company.
4. Assign the access rights to the users.
5. Configure data sharing between companies where needed.

19.3.4 How do I import data in bulk?

To import data in bulk:

1. Prepare your data in a CSV or XLS file.
2. Open the list view of the records concerned.
3. Click **Import**.
4. Download a template if you need one.
5. Map the columns to the Odoo fields.
6. Run the import and check the results.

CHAPTER 20

Glossary

20.1 Odoo terminology

API Application Programming Interface. The interface that lets other systems interact with Odoo.

Apps Odoo's main modules, which add major features: Sales, CRM, Inventory and so on.

Backend Odoo's administration interface, used by the employees of the business.

Chatter The messaging system built into every Odoo record, which carries the discussions and the history of the changes.

CRM Customer Relationship Management. The module for handling the customer relationship.

Developer mode A special mode giving access to advanced technical features, reached by adding `?debug=1` to the URL.

Enterprise edition The paid edition of Odoo, with advanced features and official support.

Filter A condition narrowing down the data displayed.

Kanban A type of view presenting the data as cards organised in columns.

Module An extension adding features to Odoo. It may be a complete application or a smaller extension.

Multi-company The feature that lets several legal entities be handled in the same Odoo instance.

OdooBot The virtual assistant built into Odoo to guide new users.

ORM Object-Relational Mapping. The system Odoo uses to interact with the database.

Partner The generic term for a contact in Odoo: customer, vendor, prospect and so on.

Pivot A type of view for analysing data along several dimensions.

Portal Odoo's simplified interface, reachable by outside partners such as customers and vendors.

PostgreSQL The database management system Odoo runs on.

Python The programming language Odoo and its modules are written in.

QWeb The XML template engine used to build reports and web pages in Odoo.

Recurrence rule The configuration that repeats actions automatically on a defined schedule.

Odoo Studio The no-code customisation tool available in the Enterprise edition.

Widget A specific user interface element for displaying or editing a particular type of data.

Workflow The sequence of steps and transitions making up a business process.

XML-RPC and JSON-RPC The protocols used by the Odoo API, which allow integration with other systems.