

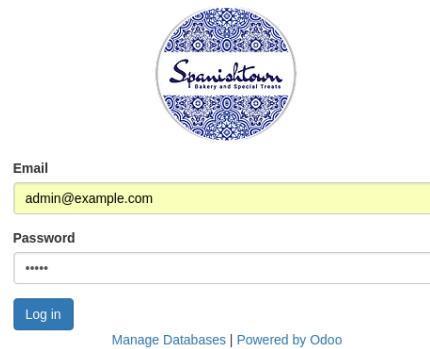


For Bakeries

Training Manual

1.0 Login Page

Login page is the default page when the user launches the OODOO.



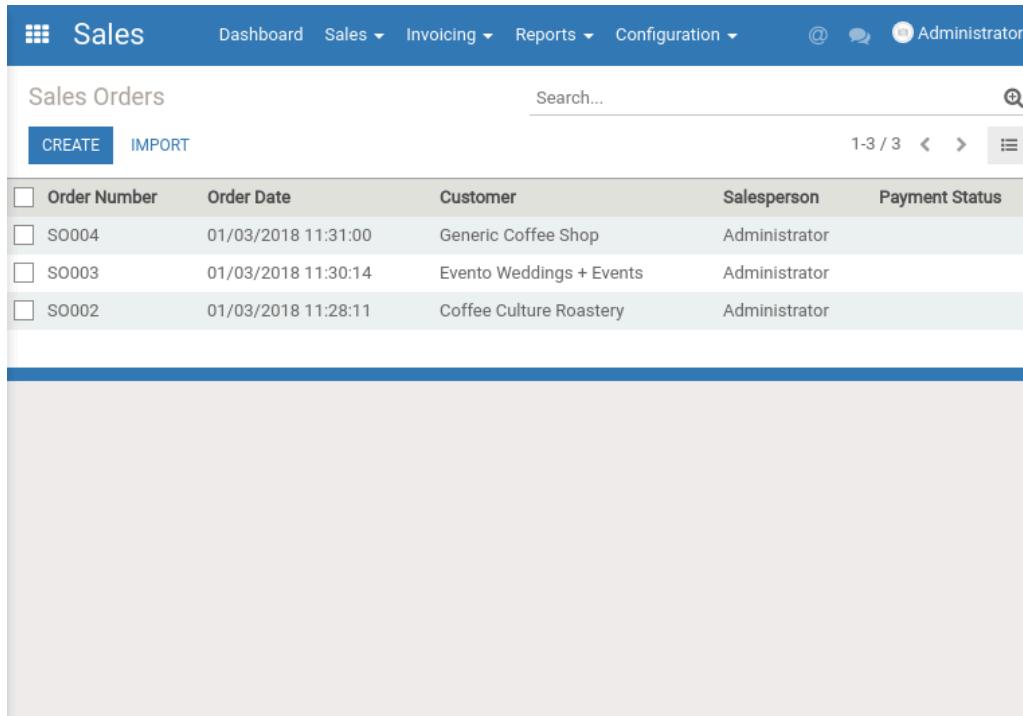
User must login by entering the **Email Address** and **Password**. After Entering the correct credentials, click the **Login** button to enter OODOO.

There is only One Type of user with Access Rights. This is the **Admin**. It has its own user rules. Please see **7.0 Settings** in the User's Manual.

2.0 Sales Orders

In the main menu , click **Sales**. User should be navigated to the Dashboard submenu page.

Click the **Sales Order** submenu under Sales menu. Page will display the list of transactions that have been made. Among the information displayed are the Order Number, Order Date, Customer, Salesperson and Payment Status.

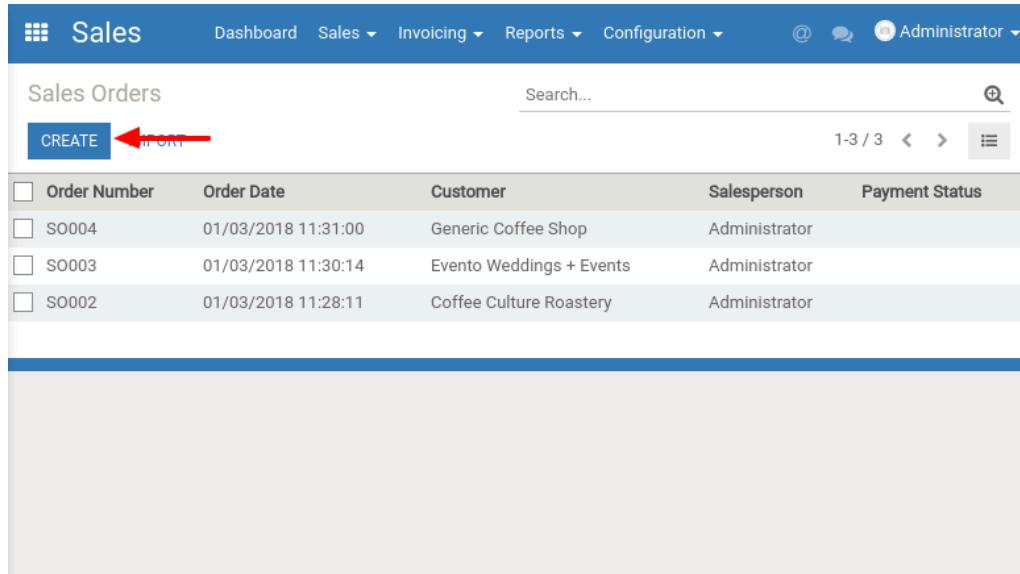


<input type="checkbox"/>	Order Number	Order Date	Customer	Salesperson	Payment Status
<input type="checkbox"/>	SO004	01/03/2018 11:31:00	Generic Coffee Shop	Administrator	
<input type="checkbox"/>	SO003	01/03/2018 11:30:14	Evento Weddings + Events	Administrator	
<input type="checkbox"/>	SO002	01/03/2018 11:28:11	Coffee Culture Roastery	Administrator	

Create button will allow the user to make a new sales order and **Import** button will allow the user to transfer the data table of another user's.

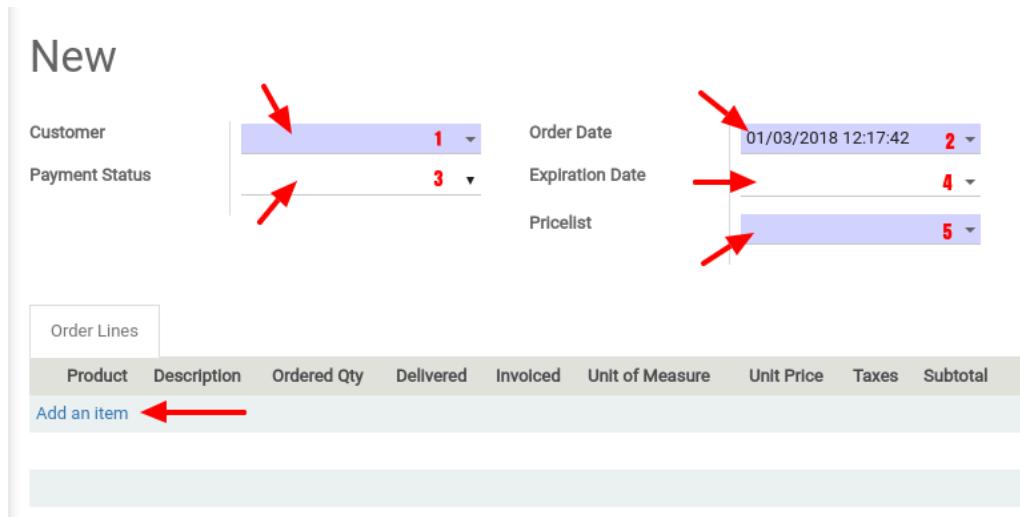
2.1 Creating New Sales Orders

Click the **Create** button under the Sales Orders label on the Sales Orders page.



The screenshot shows the Odoo Sales Orders page. At the top, there is a blue header bar with the 'Sales' label and various navigation links: Dashboard, Sales, Invoicing, Reports, Configuration, and an Administrator dropdown. Below the header is a search bar and a table titled 'Sales Orders'. The table has columns for Order Number, Order Date, Customer, Salesperson, and Payment Status. There are four rows of data: SO004 (Order Date: 01/03/2018 11:31:00, Customer: Generic Coffee Shop, Salesperson: Administrator), SO003 (Order Date: 01/03/2018 11:30:14, Customer: Evento Weddings + Events, Salesperson: Administrator), and SO002 (Order Date: 01/03/2018 11:28:11, Customer: Coffee Culture Roastery, Salesperson: Administrator). At the bottom left of the table, there is a 'CREATE' button, which is highlighted with a red arrow.

Create new Sales Order page should look like on the image below.



The screenshot shows the Odoo 'New' Sales Order creation page. The page has a 'New' title at the top. It contains several input fields with red arrows pointing to them, each labeled with a number: 1 (Customer dropdown), 2 (Order Date field), 3 (Payment Status dropdown), 4 (Expiration Date field), and 5 (Pricelist dropdown). Below these fields is a table titled 'Order Lines' with columns: Product, Description, Ordered Qty, Delivered, Invoiced, Unit of Measure, Unit Price, Taxes, and Subtotal. At the bottom of this table, there is a button labeled 'Add an item' with a red arrow pointing to it.

Note: colored text boxes are required fields.

User will be asked also to enter or choose the following fields (some of the fields optional):

- Choose **Customer**.
- Choose **Order Date**. Current date is the default value for order date.

- Choose **Payment Status**.
- Choose **Expiration Date**.
- Choose **Pricelist**. Public Pricelist (php) will automatically display after selecting the customer.

SO005
1 Delivery

Customer	Generic Coffee Shop Silay City 6102	Confirmation Date	01/03/2018 14:00:29
Payment Status		Pricelist	Public Pricelist (PHP)

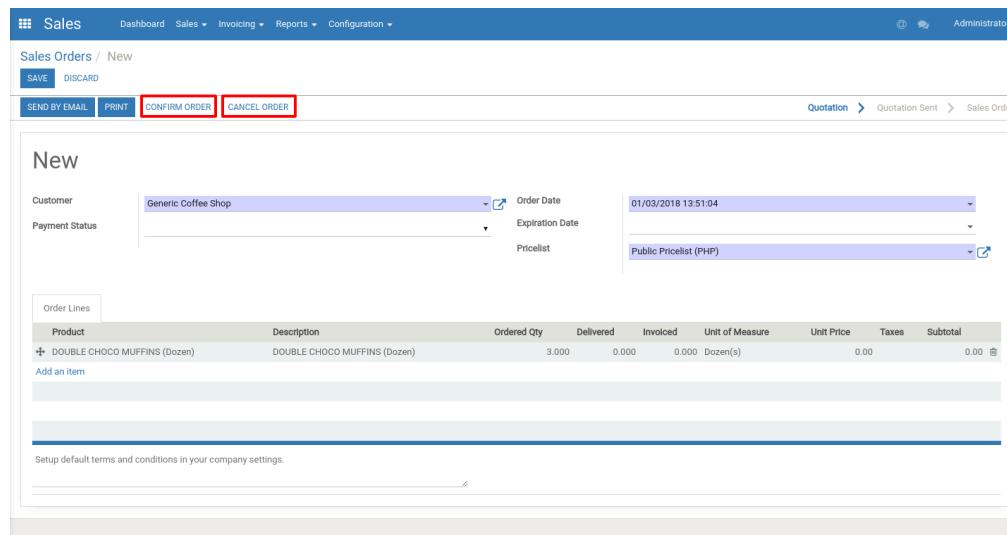
Order Lines								
Product	Description	Ordered Qty	Delivered	Invoiced	Unit of Measure	Unit Price	Taxes	Subtotal
DOUBLE CHOCO MUFFINS (Dozen)	DOUBLE CHOCO MUFFINS (Dozen)	3.000	0.000	0.000	Dozen(s)	0.00	0.00 PHP	0.00
		1.000	0.000	0.000		0.00	0.00	0.00
Add an Item								

Setup default terms and conditions in your company settings.

- **Order Lines** tab. This is the default tab on the Sales Order page.
- Click the **Add an item** option to add item of the order list. After choosing product some of the items details should be automatically populate.
- Users will be asked to enter or choose the following fields:
 - Choose **Product**.
 - **Description** label. Whatever you choose on the Product it will automatically display its description in this field
 - Enter **Ordered Qty**.
 - **Delivered** label. This field will automatically display its content after finishing the transaction or after the product has been delivered.
 - **Invoiced** label. This field will automatically display its content after finishing the transaction or after the product has been invoiced.
 - **Unit of Measure** label. This field will automatically display its content depending to the product's unit of measurement.

- **Unit Price** label. This field will automatically display its content depending to the product's unit price.
- Choose **Taxes**.
- **Subtotal** label. This field will automatically display and solve for the sum of its product's subtotal.

To Add another item, just click the Add an item option and repeat process on the Order Lines tab above.

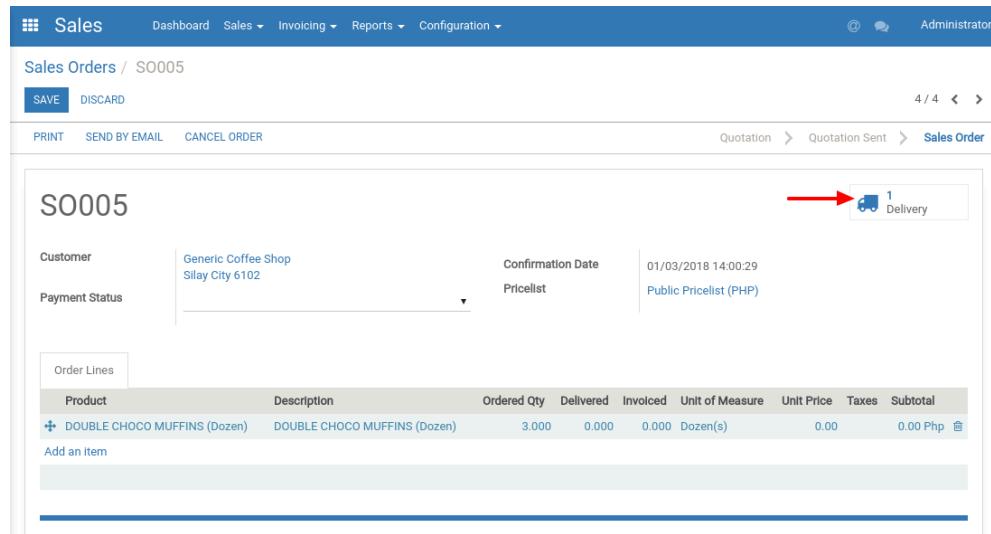


The screenshot shows the Odoo Sales Orders interface. At the top, there are buttons for **SAVE** and **DISCARD**, and below them are **SEND BY EMAIL**, **PRINT**, **CONFIRM ORDER** (which is highlighted with a red box), and **CANCEL ORDER** (which is also highlighted with a red box). The main area is titled "New" and shows a table for "Order Lines". The table has columns for Product, Description, Ordered Qty, Delivered, Invoiced, Unit of Measure, Unit Price, Taxes, and Subtotal. A single row is visible, showing "DOUBLE CHOCO MUFFINS (Dozen)" as the product, "DOUBLE CHOCO MUFFINS (Dozen)" as the description, "3.000" as the ordered quantity, "0.000" as the delivered quantity, "0.000" as the invoiced quantity, "Dozen(s)" as the unit of measure, "0.00" as the unit price, and "0.00" as the subtotal. Below the table, there is a note: "Setup default terms and conditions in your company settings."

Click the **Save** button under the Sales Orders label to save the created sales orders product and click the **Discard** button otherwise.

Click the **Confirm Order** button to continue with the Sales Order transaction and click the **Cancel Order** button otherwise.

Click the **Delivery** option with a truck icon at the upper right section of the ordered page.



Sales Orders / SO005

Customer: Generic Coffee Shop
Silay City 6102

Confirmation Date: 01/03/2018 14:00:29

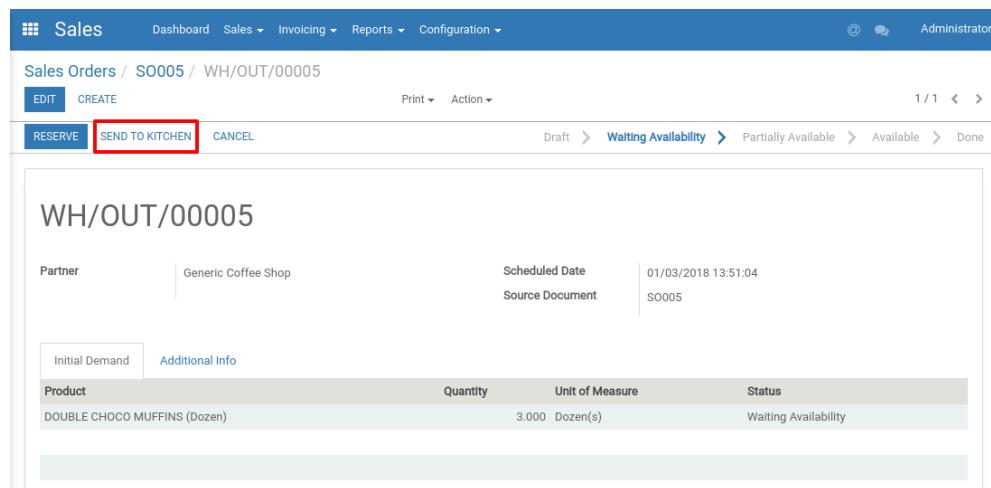
Payment Status: **SO005**

Order Lines:

Product	Description	Ordered Qty	Delivered	Invoiced	Unit of Measure	Unit Price	Taxes	Subtotal
DOUBLE CHOCO MUFFINS (Dozen)	DOUBLE CHOCO MUFFINS (Dozen)	3.000	0.000	0.000	Dozen(s)	0.00	0.00	0.00 PHP

Delivery: 1

Click the **Send To Kitchen** button. This sends the product orders to the kitchen.



Sales Orders / SO005 / WH/OUT/00005

RESERVE **SEND TO KITCHEN** CANCEL

WH/OUT/00005

Partner: Generic Coffee Shop

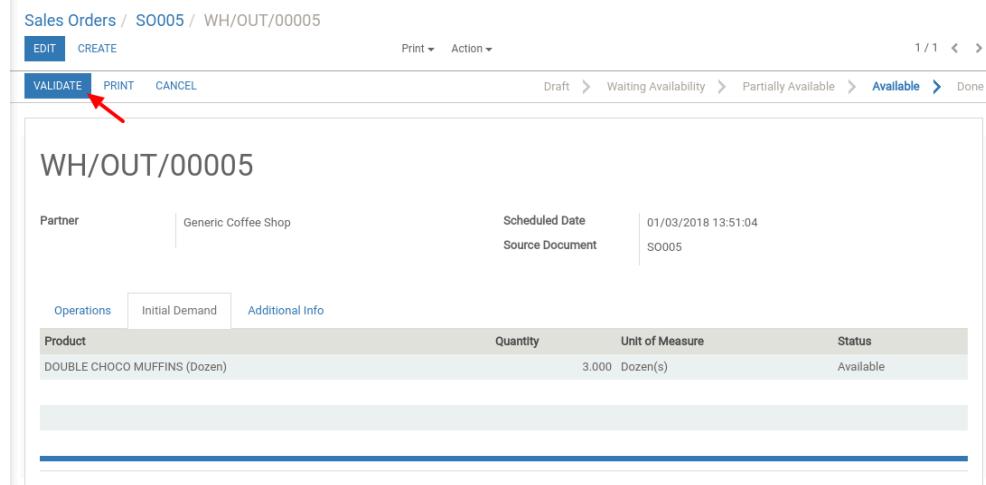
Scheduled Date: 01/03/2018 13:51:04

Source Document: SO005

Initial Demand Additional Info

Product	Quantity	Unit of Measure	Status
DOUBLE CHOCO MUFFINS (Dozen)	3.000	Dozen(s)	Waiting Availability

Click the **Validate** button. This is to validate that the products are received successfully.



Sales Orders / SO005 / WH/OUT/00005

EDIT CREATE Print Action 1 / 1 < >

VALIDATE PRINT CANCEL Draft > Waiting Availability > Partially Available > Available > Done

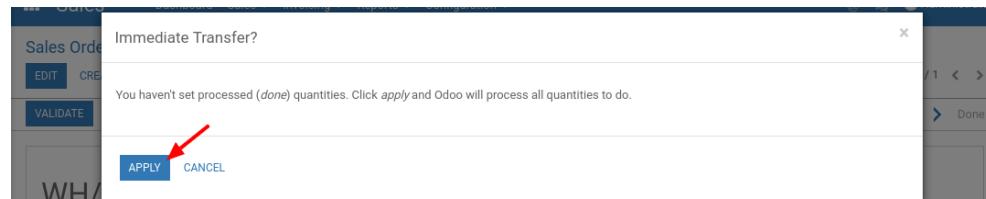
WH/OUT/00005

Partner: Generic Coffee Shop Scheduled Date: 01/03/2018 13:51:04
Source Document: SO005

Operations Initial Demand Additional Info

Product	Quantity	Unit of Measure	Status
DOUBLE CHOCO MUFFINS (Dozen)	3.000	Dozen(s)	Available

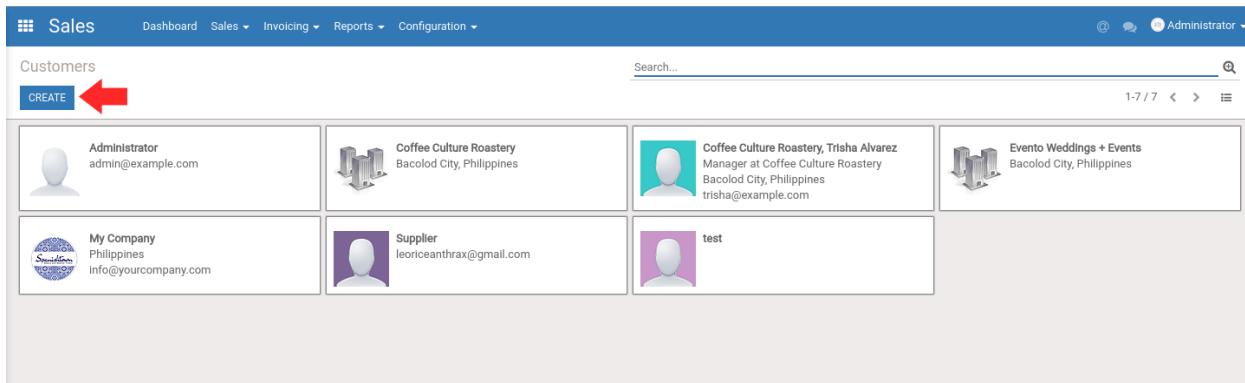
Please see image below is the Validation Modal, modal will appear after clicking **Validate** button.



Click the **Apply** button to complete the Sales Order Transaction.

2.2 Creating new Customers

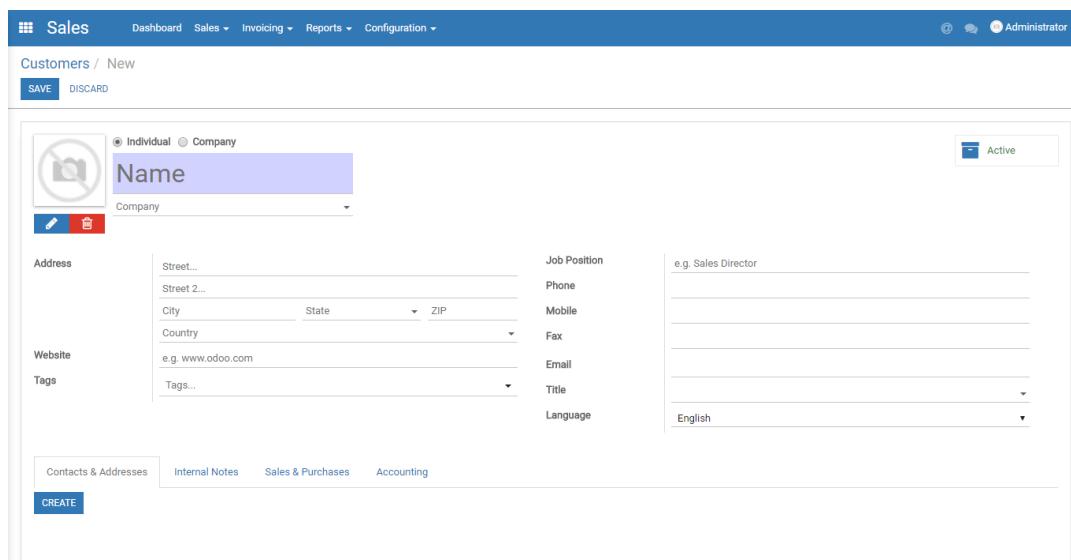
Click the **Customers** submenu option under the Sale Menu. User will be navigated to the Customer page. Customers page contains the list of Spanish Town's customer list. Please see image below.



Click the **Create** button to create new customer. Create customer page will load and please see image below.

Choose between **Individual** or **Company**. (*The forms to be filled will change according to the customer type the users chose.*)

2.2.1 Individual

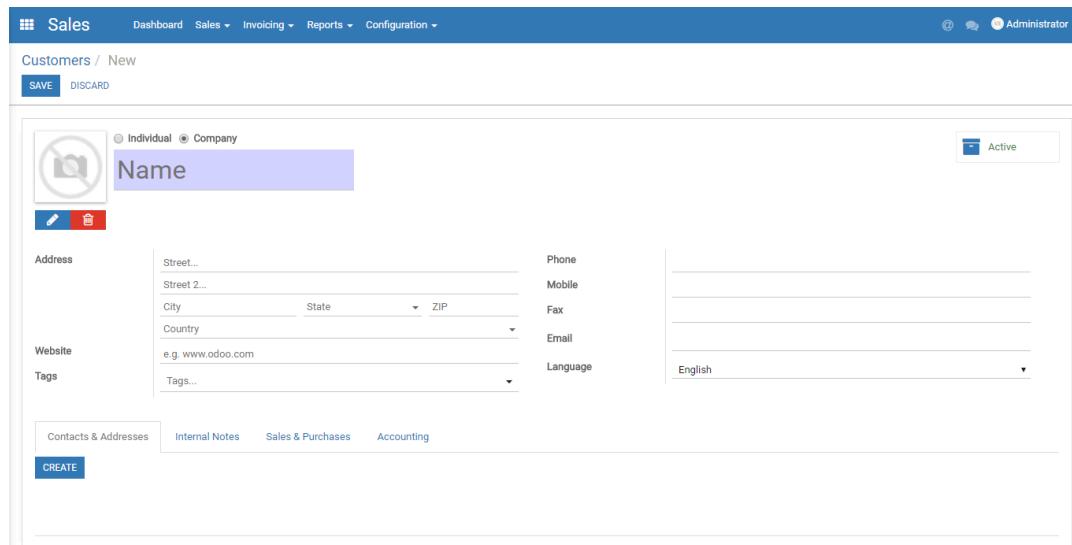


User will be asked also to enter or choose the following fields. (*Individual*).

- Enter **Name**.
- Choose **Company**.
- **Address Label**
 - Enter **Street**.
 - Enter **Street 2**.
 - Enter **City**.
 - Choose **State**.
 - Enter **Zip**.
 - Choose **Country**.
 - Enter **Website**.
 - Choose **Tags**.
 - Enter **Job Position**.
 - Enter **Phone** Number.
 - Enter **Mobile** Number.
 - Enter **Fax** number.
 - Enter **Email** address.
 - Choose **Title**.
 - Choose **Language**.

Click the **Save** button to save the created new Customer and click the **Discard** otherwise.

2.2.2 Company



User will be asked also to enter or choose the following fields. (**Company**).

- Enter **Name**.
- Choose **Company**.
- **Address Label**
 - Enter **Street**.
 - Enter **Street 2**.
 - Enter **City**.
 - Choose **State**.
 - Enter **Zip**.
 - Choose **Country**.
 - Enter **Website**.
 - Choose **Tags**.
 - Enter **Phone** Number.
 - Enter **Mobile** Number.
 - Enter **Fax** number.
 - Enter **Email** address.
 - Choose **Language**.

Click the **Save** button to save the created new Customer and click the **Discard** otherwise.

After Creating Customer (Company):

Customers / Spanishtown Bakery

EDIT CREATE Print Action 5 / 7 < >

Spanishtown Bakery

Active

Address	Don Emilio Village Kabankalan City 6111 Philippines	Phone Mobile Fax	Email	info@spanishtownbakery.com
Website	http://www.spanishtownbakery.com	Language	English	
Tags				

[Contacts & Addresses](#) [Internal Notes](#) [Sales & Purchases](#) [Accounting](#)

[NEW MESSAGE](#) [Log an internal note](#)

Follow [▲ 0](#) [▼ 0](#)

After Creating Customer (Individual):

Customers / Coffee Culture Roastery, Trisha Alvarez

EDIT CREATE Print Action 3 / 7 < >

Trisha Alvarez

Coffee Culture Roastery

Active

Address	Bacolod-San Carlos City Rd Bacolod City 6100 Philippines	Job Position	Manager
Website		Phone Mobile	0922 934 3872
Tags		Fax Email Title	trisha@example.com
		Language	English

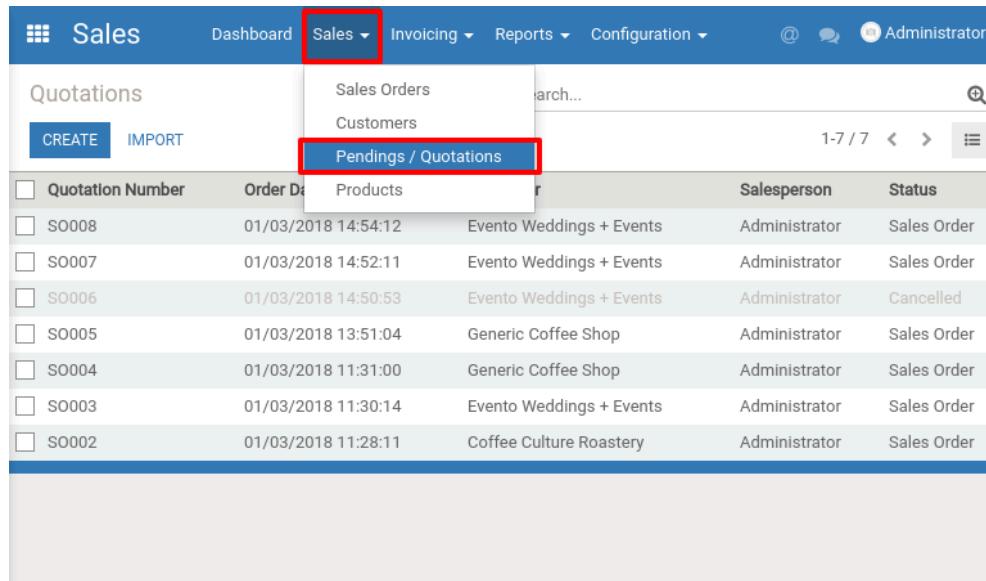
[Contacts & Addresses](#) [Internal Notes](#) [Sales & Purchases](#) [Accounting](#)

[NEW MESSAGE](#) [Log an internal note](#)

Following [▲ 1](#) [▼ 1](#)

2.3 Creating new Quotations

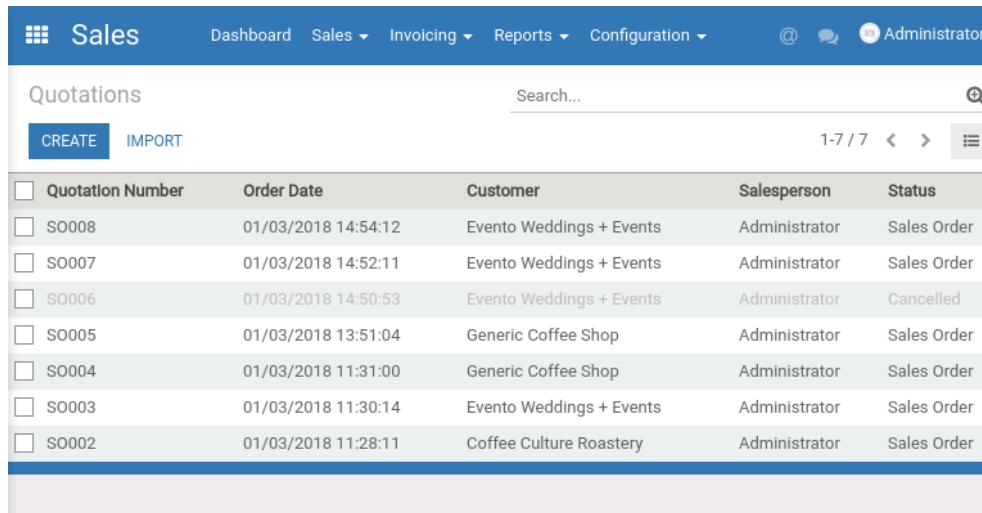
Click the **Pendings/ Quotations** submenu under the Sales menu.



The screenshot shows the Odoo Sales interface. The top navigation bar has 'Sales' selected, and the 'Quotations' submenu is highlighted with a red box. The main content area displays a list of quotations with columns for Quotation Number, Order Date, Customer, Salesperson, and Status. The first quotation in the list is selected.

Quotation Number	Order Date	Customer	Salesperson	Status
SO008	01/03/2018 14:54:12	Evento Weddings + Events	Administrator	Sales Order
SO007	01/03/2018 14:52:11	Evento Weddings + Events	Administrator	Sales Order
SO006	01/03/2018 14:50:53	Evento Weddings + Events	Administrator	Cancelled
SO005	01/03/2018 13:51:04	Generic Coffee Shop	Administrator	Sales Order
SO004	01/03/2018 11:31:00	Generic Coffee Shop	Administrator	Sales Order
SO003	01/03/2018 11:30:14	Evento Weddings + Events	Administrator	Sales Order
SO002	01/03/2018 11:28:11	Coffee Culture Roastery	Administrator	Sales Order

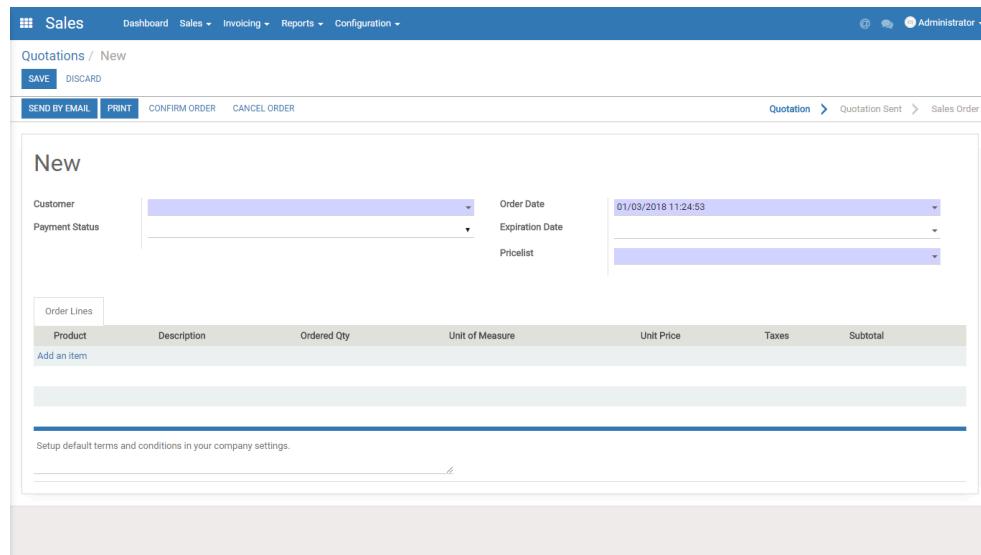
Clicking the **Quotations** submenu under Sales menu will load the page on the Quotations page shown below.



The screenshot shows the Odoo Sales interface with the 'Quotations' submenu selected. The main content area displays a list of quotations with columns for Quotation Number, Order Date, Customer, Salesperson, and Status. The first quotation in the list is selected.

Quotation Number	Order Date	Customer	Salesperson	Status
SO008	01/03/2018 14:54:12	Evento Weddings + Events	Administrator	Sales Order
SO007	01/03/2018 14:52:11	Evento Weddings + Events	Administrator	Sales Order
SO006	01/03/2018 14:50:53	Evento Weddings + Events	Administrator	Cancelled
SO005	01/03/2018 13:51:04	Generic Coffee Shop	Administrator	Sales Order
SO004	01/03/2018 11:31:00	Generic Coffee Shop	Administrator	Sales Order
SO003	01/03/2018 11:30:14	Evento Weddings + Events	Administrator	Sales Order
SO002	01/03/2018 11:28:11	Coffee Culture Roastery	Administrator	Sales Order

Click the **Create** button under the Quotation label. Create Quotation page will load.



User will be asked also to enter or choose the following fields:

- Choose **Customer**.
- Choose **Payment Status**.
- **Order Date** - The Present date will automatically appear.
- Choose **Expiration Date**.
- **Pricelist** - Public Pricelist (php) will automatically display after selecting the customer.

Click the **Add an Item** option to add items or product.

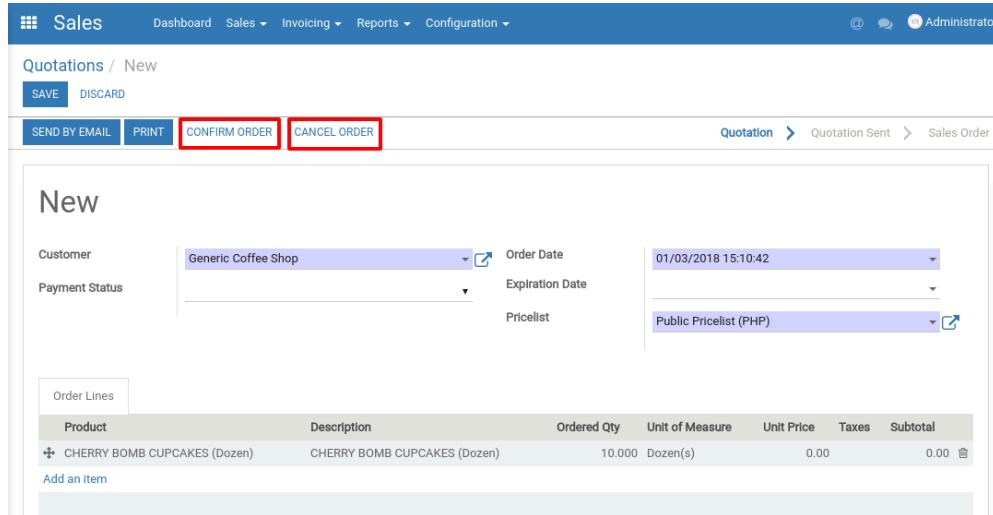
New

Customer		Order Date	01/03/2018 15:02:50																																										
Payment Status		Expiration Date																																											
		Pricelist																																											
<table border="1"> <thead> <tr> <th colspan="7">Order Lines</th> </tr> <tr> <th>Product</th> <th>Description</th> <th>Ordered Qty</th> <th>Unit of Measure</th> <th>Unit Price</th> <th>Taxes</th> <th>Subtotal</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>1.000</td> <td></td> <td>0.00</td> <td></td> <td>0.00</td> </tr> <tr> <td colspan="7"> Add an item </td> </tr> <tr> <td colspan="7"></td> </tr> <tr> <td colspan="7"></td> </tr> </tbody> </table>				Order Lines							Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Subtotal			1.000		0.00		0.00	Add an item																				
Order Lines																																													
Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Subtotal																																							
		1.000		0.00		0.00																																							
Add an item																																													
<p>Setup default terms and conditions in your company settings.</p>																																													

User will be asked also to enter or choose the following fields:

- Choose **Product**.
- **Description** - Whatever you choose on the Product it will automatically appear in this field.
- Enter **Ordered Qty**.
- **Unit of Measure** - Will automatically display its content depending on the product's unit of measurement.
- **Unit Price** - Will automatically display its content depending on the product's unit price.
- Choose **Taxes**.
- **Subtotal** - Will automatically display and solve for the sum of its product's subtotal.

Click **Confirm Order** to continue the process and click **Cancel Order** otherwise.



Sales Dashboard Sales Invoicing Reports Configuration Administrator

Quotations / New

SAVE DISCARD

SEND BY EMAIL PRINT CONFIRM ORDER CANCEL ORDER

Quotation > Quotation Sent > Sales Order

New

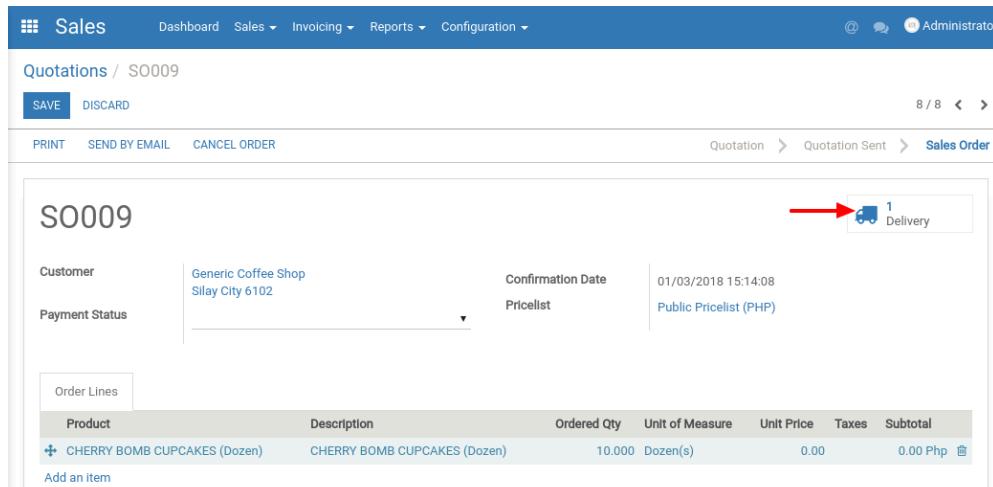
Customer: Generic Coffee Shop Order Date: 01/03/2018 15:10:42

Payment Status: Expiration Date: Pricelist: Public Pricelist (PHP)

Order Lines

Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Subtotal
CHERRY BOMB CUPCAKES (Dozen)	CHERRY BOMB CUPCAKES (Dozen)	10.000	Dozen(s)	0.00	0.00	0.00
Add an item						

Click the **Delivery button** with a truck icon at the upper right section of the page.



Sales Dashboard Sales Invoicing Reports Configuration Administrator

Quotations / SO009

SAVE DISCARD

PRINT SEND BY EMAIL CANCEL ORDER

Quotation > Quotation Sent > Sales Order

SO009

Customer: Generic Coffee Shop Silay City 6102 Confirmation Date: 01/03/2018 15:14:08

Payment Status: Pricelist: Public Pricelist (PHP)

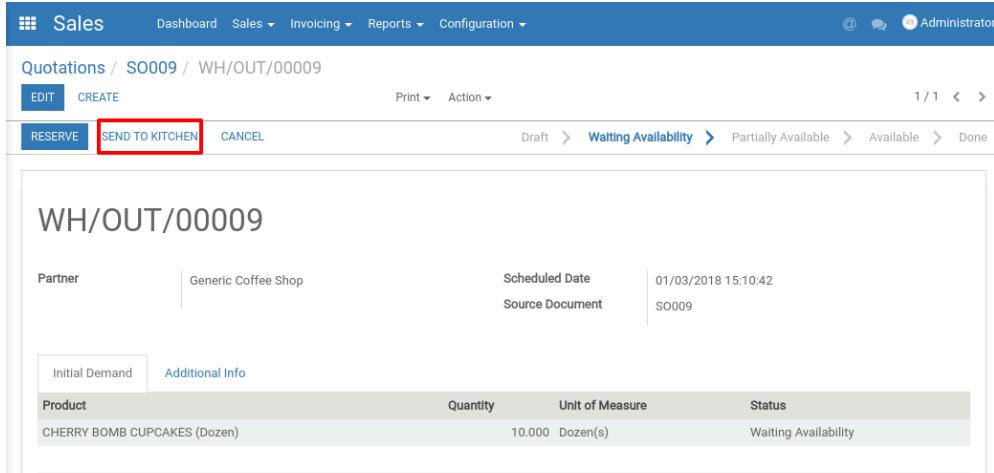
Order Lines

Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Subtotal
CHERRY BOMB CUPCAKES (Dozen)	CHERRY BOMB CUPCAKES (Dozen)	10.000	Dozen(s)	0.00	0.00	0.00
Add an item						

1 Delivery

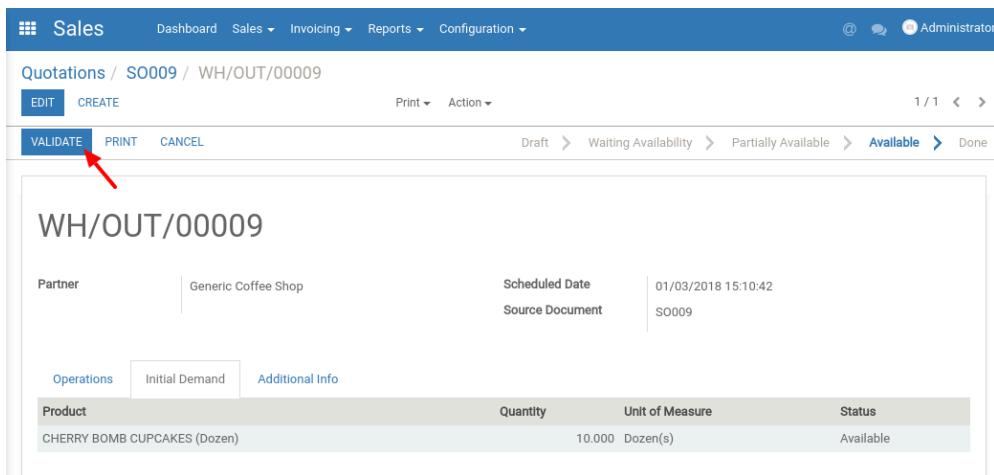
Note: Same Instructions can be applied to Creating Sales orders.

Click the **Send To Kitchen** button. This sends the product orders to the kitchen.



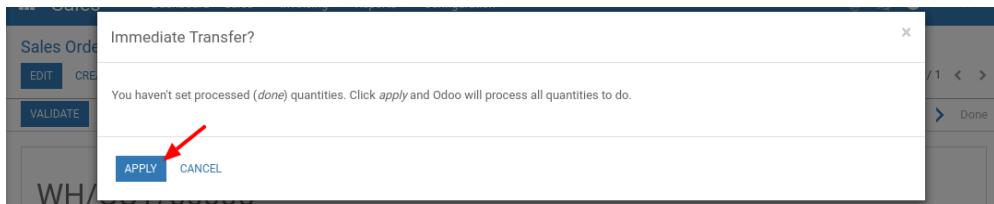
The screenshot shows the Odoo Sales interface for Quotations / SO009. The top navigation bar includes Sales, Invoicing, Reports, and Configuration. The main content area shows a quotation for WH/OUT/00009. The 'SEND TO KITCHEN' button is highlighted with a red box. Other buttons visible are RESERVE, CANCEL, Print, and Action. The status bar at the bottom shows 1 / 1 and various availability levels: Waiting Availability, Partially Available, Available, and Done.

Click the **Validate** button. This is to validate that the products are received successfully.



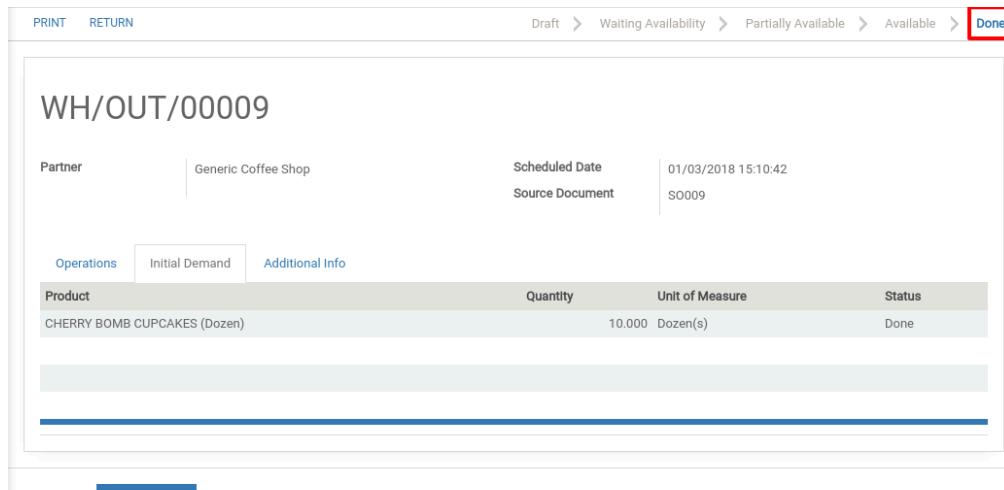
The screenshot shows the Odoo Sales interface for Quotations / SO009. The top navigation bar includes Sales, Invoicing, Reports, and Configuration. The main content area shows a quotation for WH/OUT/00009. The 'VALIDATE' button is highlighted with a red box. Other buttons visible are PRINT and CANCEL. The status bar at the bottom shows 1 / 1 and various availability levels: Waiting Availability, Partially Available, Available, and Done.

Please see image below is the Validation Modal, modal will appear after clicking **Validate** button.



The screenshot shows a validation modal titled 'Immediate Transfer?'. The message inside the modal states: 'You haven't set processed (done) quantities. Click apply and Odoo will process all quantities to do.' The 'APPLY' button is highlighted with a red arrow. The 'CANCEL' button is also visible.

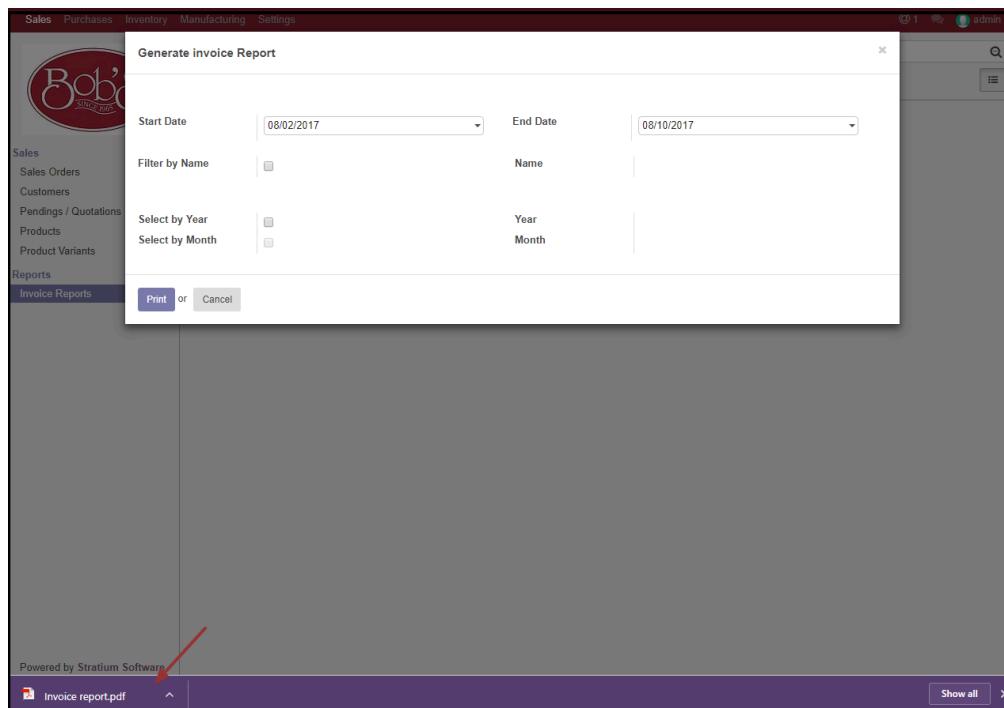
Click the **Apply** button to complete the Sales Order Transaction. Quotation Process is complete and status is displayed as Done. Image screen should look like below.



The screenshot shows the Odoo Sales Order Transaction screen. At the top, there are buttons for PRINT and RETURN. To the right, a breadcrumb navigation shows the status progression: Draft > Waiting Availability > Partially Available > Available > **Done** (the Done button is highlighted with a red box). The main header displays the reference number WH/OUT/00009. Below the header, there are sections for Partner (Generic Coffee Shop), Scheduled Date (01/03/2018 15:10:42), and Source Document (SO009). A tabs section shows Operations (selected), Initial Demand, and Additional Info. A table lists the product details: CHERRY BOMB CUPCAKES (Dozen) with a quantity of 10.000 and a unit of measure of Dozen(s), and a status of Done. At the bottom, there are buttons for NEW, REVERSE, and CANCEL.

2.4 Generating Invoice

Click the **Invoice Reports** submenu option under the Sales menu. Generate Invoice Report modal will display.



The screenshot shows the Odoo Sales menu with the following navigation: Sales > Purchases > Inventory > Manufacturing > Settings. The left sidebar shows the Sales menu with sub-options: Sales Orders, Customers, Pending Quotations, Products, Product Variants, and Reports. The Reports option is selected, and a sub-menu for Invoice Reports is displayed. A modal window titled "Generate invoice Report" is open, containing fields for Start Date (08/02/2017), End Date (08/10/2017), Filter by Name, Name, Select by Year, Year, and Month. At the bottom of the modal are "Print" and "Cancel" buttons. A red arrow points to the "Invoice report.pdf" file in the bottom right corner of the modal. The bottom of the screen shows the footer "Powered by Striatum Software" and a "Show all" button.

User will be asked to execute the following fields (some of the fields are optional):

- Select **Start Date**.
- Select **End Date**.
- Click **Filter By Name**.
- Enter **Name**.
- Click **Select by Year**.
- Select **Year**.
- Click **Select by Month**.
- Select **Month**.

Click the **Print** button to download the Invoice Report according to the entered filtered option.

The generated invoice report will be downloaded automatically.

Click the generated invoice report file name button left of the screen to open the generated invoice report. *Please see page 17 for the sample generated invoice report.*

Click the **Cancel** button to close the Generate Invoice Report and the report is not downloaded automatically.

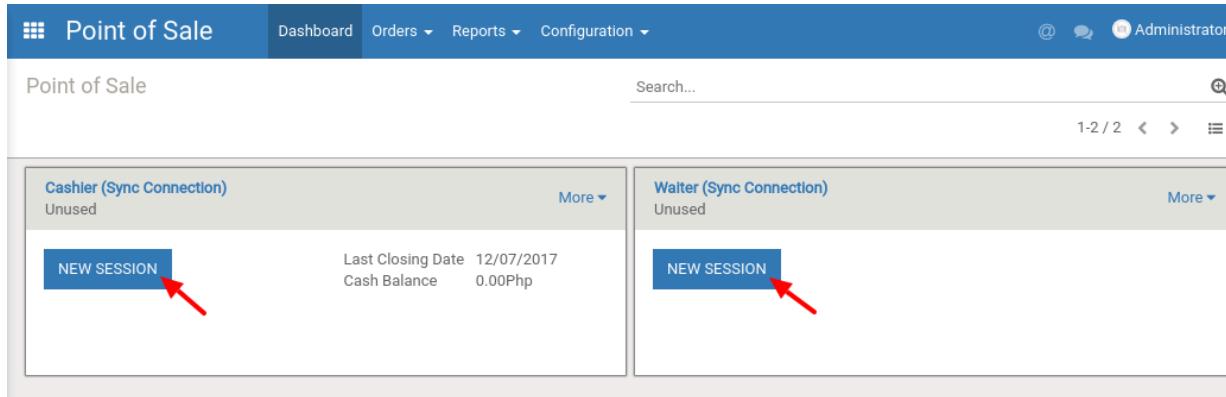
Then the PDF form of generated report sample data.

Invoice Report				
Name	Order Date	Customer	Salesperson	Payment Status
SO095	2017-08-10 01:53:33	Bob's Ayala	admin	
SO094	2017-08-10 01:45:34	Bob's Ayala	admin	
SO093	2017-08-10 01:45:08	Bob's Ayala	admin	
SO092	2017-08-09 09:04:49	Bob's Ayala	admin	
SO091	2017-08-09 07:10:23	Bob's Ayala	Dev	
SO088	2017-08-08 09:00:04	Bob's Ayala	admin	1
SO087	2017-08-08 07:57:30	Bob's Ayala	admin	1
SO086	2017-08-08 07:54:58	Bob's Ayala	admin	
SO085	2017-08-08 07:53:01	Bob's Ayala	admin	
SO084	2017-08-08 07:46:26	Bob's Ayala	admin	1
SO083	2017-08-08 07:45:41	Bob's Ayala	Dev	
SO081	2017-08-08 07:20:17	Bob's Ayala	admin	1
SO080	2017-08-08 07:09:35	Bob's Ayala	admin	1
SO079	2017-08-08 06:10:52	Bob's Ayala	admin	
SO078	2017-08-08 05:59:19	Bob's Ayala	admin	
SO077	2017-08-08 05:57:01	Bob's Ayala	admin	
SO076	2017-08-08 05:10:07	Bob's Ayala	Dev	2
SO075	2017-08-08 05:09:08	Bob's Ayala	Dev	
SO074	2017-08-08 05:02:19	Bob's Ayala	Dev	
SO073	2017-08-08 04:54:44	Bob's Ayala	Dev	
SO071	2017-08-07 06:42:21	Bobs 1	admin	
SO070	2017-08-07 05:59:02	BOB's Lacson	Dev	
SO069	2017-08-07 05:54:25	Bob's Ayala	admin	2
SO068	2017-08-07 05:31:04	Bob's Ayala	admin	1
SO067	2017-08-07 05:29:37	Bob's Ayala	admin	
SO066	2017-08-07 05:29:28	Bobs 1	testmanager	1
SO065	2017-08-07 04:03:27	Bobs Ayala 1	testmanager	
SO056	2017-08-02 01:00:26	admin	Dev	

3.0 Point of Sale

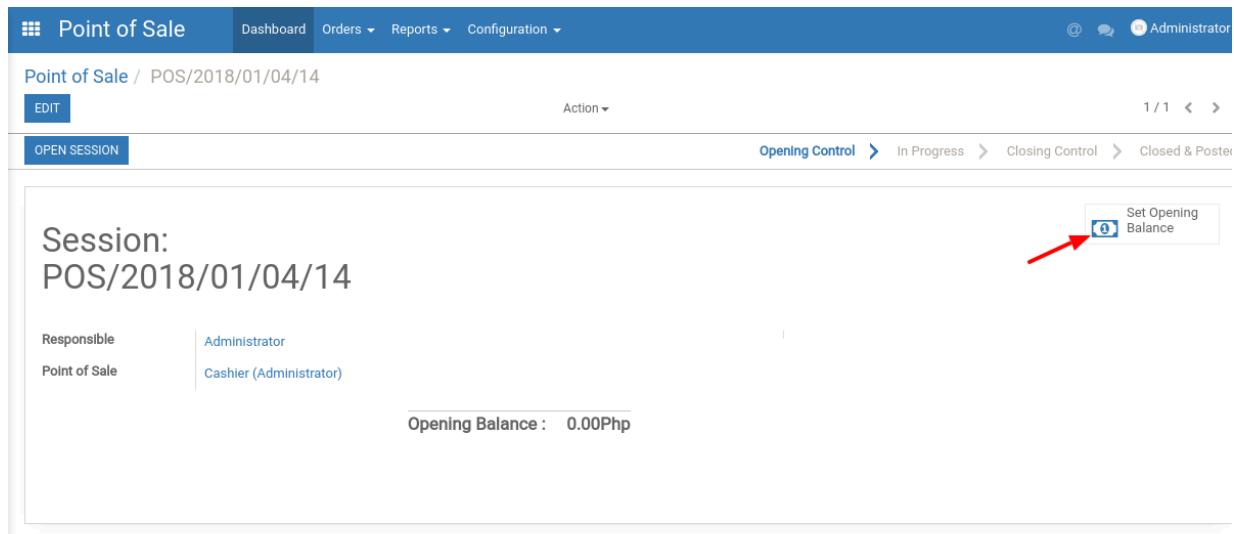
In the main menu , click **Point of Sale**. User should be navigated to the Dashboard submenu page.

The Dashboard page will display different terminals with POS including information such as its last closing date and cash balance. Select a terminal and click the **New Session** button to begin.

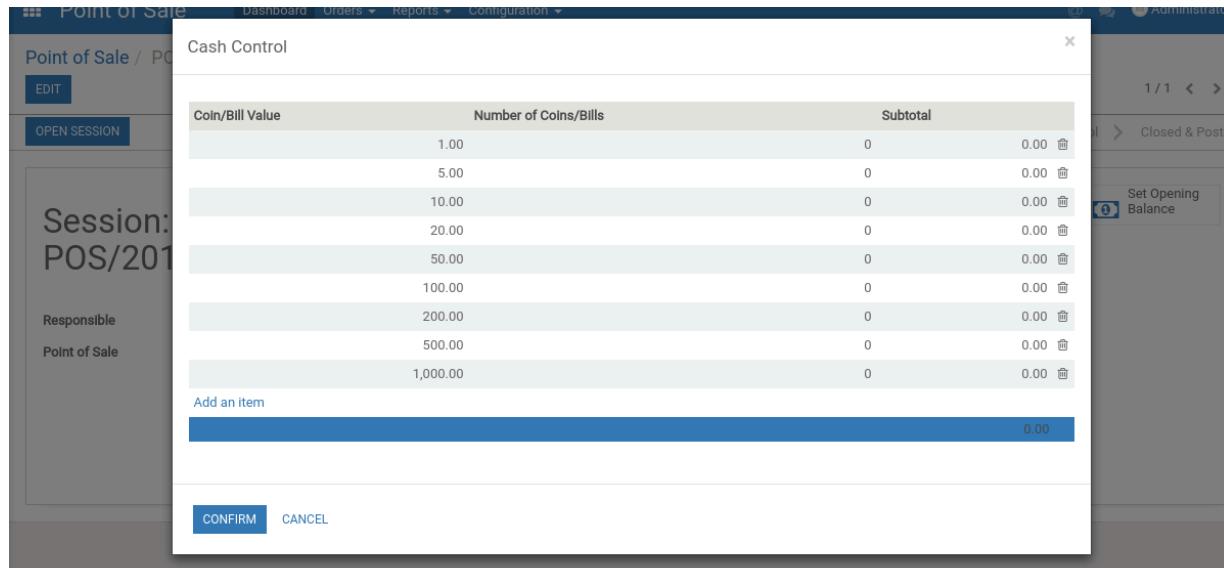


3.1 New Session

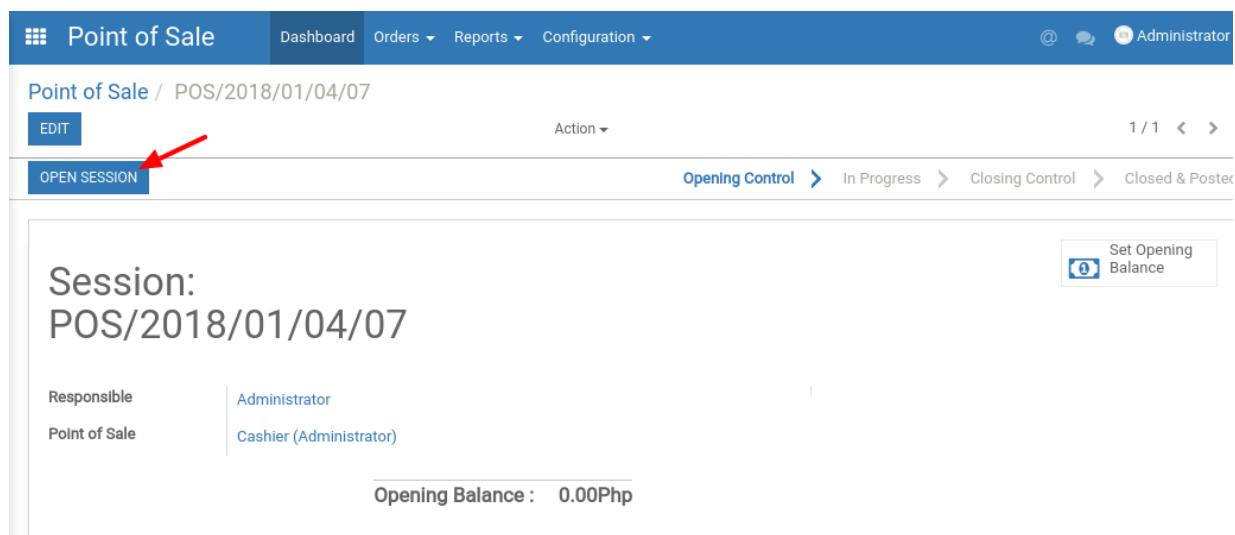
When **New Session** button is clicked, the session's page is displayed.



Clicking the **Set Open Balance** option with the money icon opens the modal shown below. The user may set the opening balance there.



Click the **Open Session** button. This sets the session's status to In Progress.



After the session is opened, to use begin/continue using POS click **Continue Selling** button, otherwise click **End of Session** button.

Point of Sale Dashboard Orders ▾ Reports ▾ Configuration ▾ Administrator

Point of Sale / POS/2018/01/04/13 Action ▾ 1 / 1 < >

EDIT CONTINUE SELLING (highlighted with a red arrow) END OF SESSION

Opening Control > In Progress > Closing Control > Closed & Posted

Put Money In Take Money Out Set Closing Balance

Session:
POS/2018/01/04/13

Responsible: Administrator Opening Date: 01/04/2018 13:50:57

Point of Sale: Waiter (Administrator)

Opening Balance: 0.00Php
+ Transactions: 0.00Php
= Theoretical Closing Balance: 0.00Php

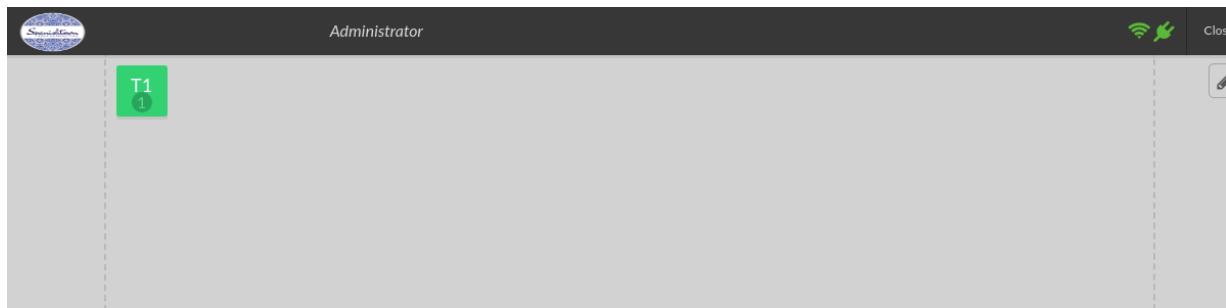
Real Closing Balance: 0.00Php

Difference: 0.00Php

Summary by Payment Methods

Reference	Journal	Starting Balance	Transactions Subtotal	Ending Balance	Difference	Currency	Status
POS/2018/01/04/13	Cash (PHP)	0.00 Php	0.00 Php	0.00 Php	0.00 Php	PHP	New
POS/2018/01/04/13	Check (PHP)	0.00 Php	0.00 Php	0.00 Php	0.00 Php	PHP	New

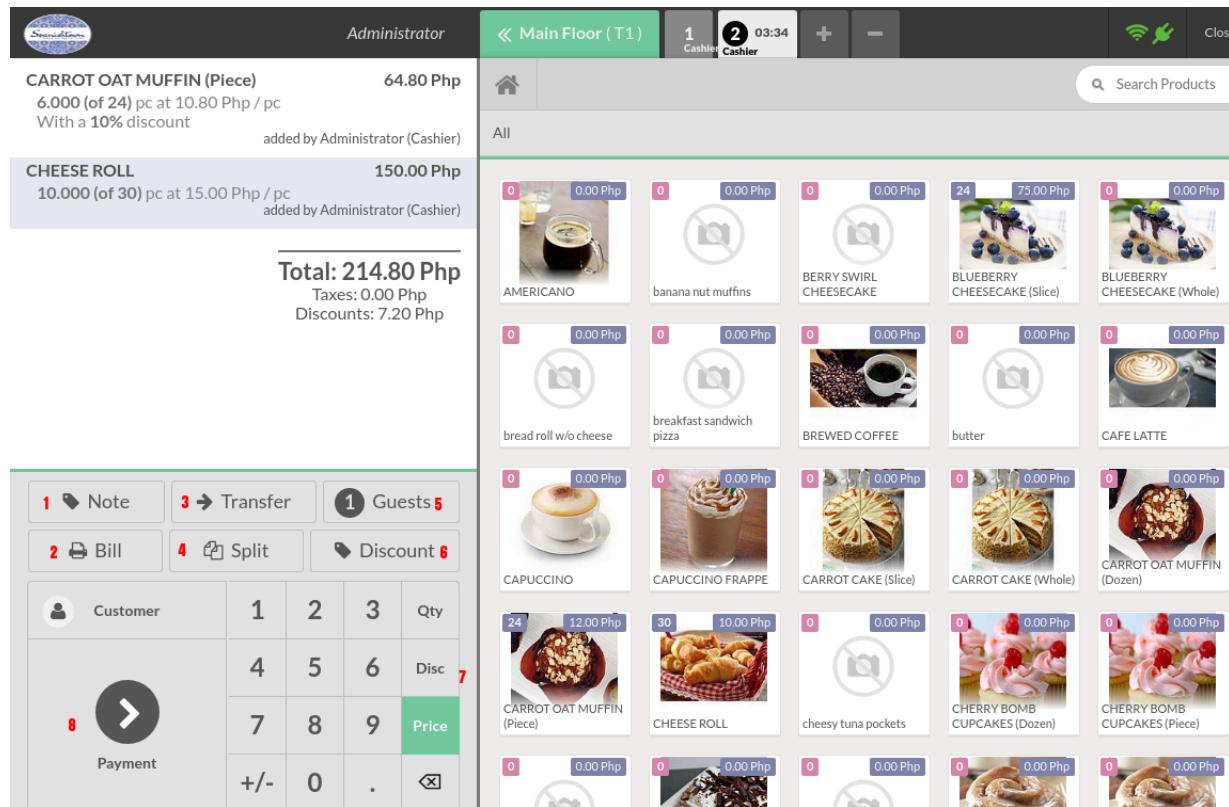
The POS page will, by default, display the available tables as shown on the image below.



3.2 Using Point of Sale

Click on a table to add items. It should display the shopping cart and list of products as shown on the image below.

To add an item in the shopping cart click on an item.



User may choose to execute the following options found in the shopping cart (some are optional):

Note option.

Bill option.

Transfer option.

Split option.

Guests option.

Discount option.

Enter **Quantity/Discount/Price**.

Payment option.

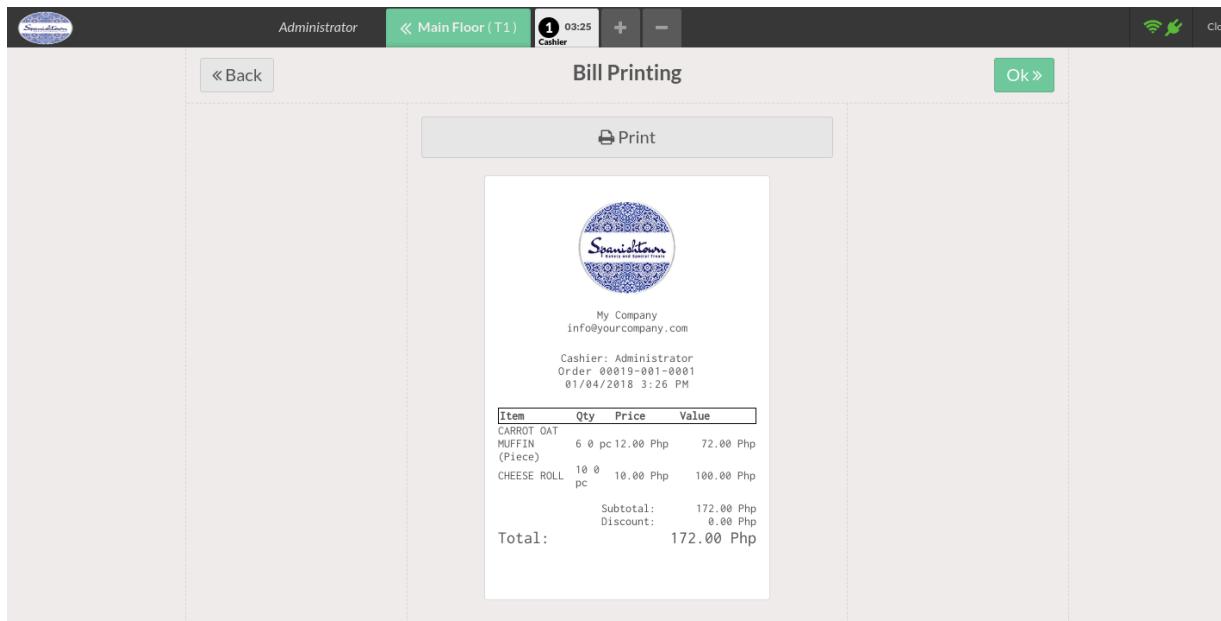
Each option will be explained in the following pages.

3.2.1 Note

This enables the user to add a note to the order.

3.2.2 Bill

This option generates a bill the user can print. Information of the order is displayed such as the item, quantity, price, value and the total.



Bill Printing

Print

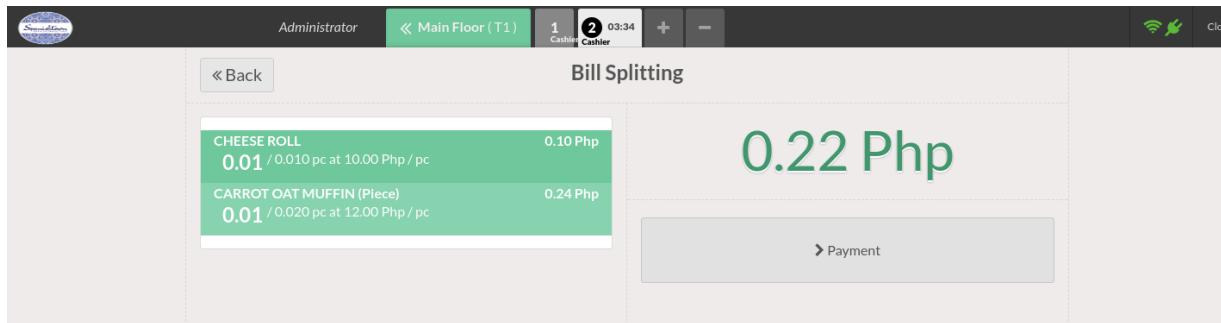
Item	Qty	Price	Value
CARROT OAT	6	12.00 Php	72.00 Php
MUFFIN (Piece)	10	18.00 Php	100.00 Php
CHEESE ROLL	0		
		Subtotal:	172.00 Php
		Discount:	0.00 Php
		Total:	172.00 Php

3.2.3 Transfer

This redirects the user back to the available tables page. User may switch between different orders from other tables.

3.2.4 Split

This “splits” the order items into separate payments and orders. The selected items and their quantity from the order is relocated to another separate order.



Bill Splitting

CHEESE ROLL 0.01 / 0.010 pc at 10.00 Php / pc	0.10 Php
CARROT OAT MUFFIN (Piece) 0.01 / 0.020 pc at 12.00 Php / pc	0.24 Php

0.22 Php

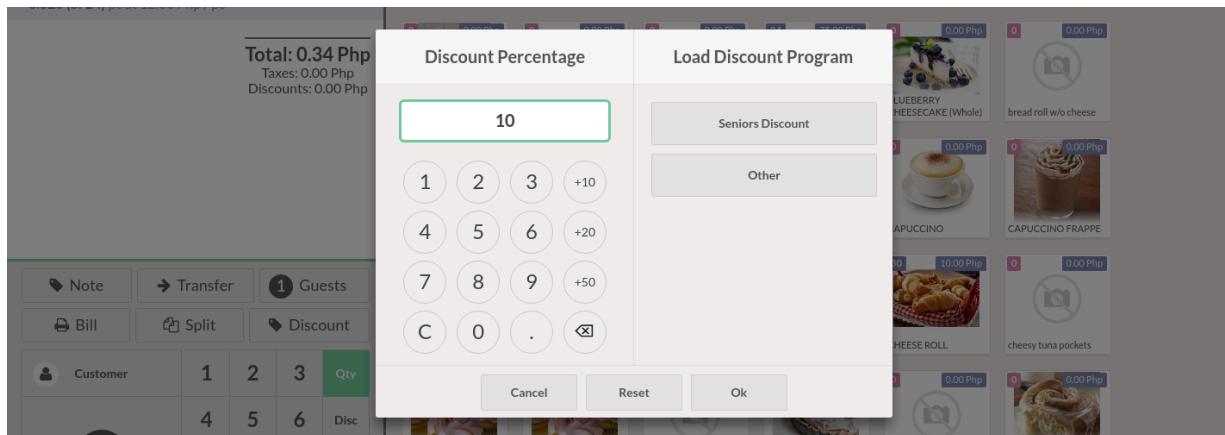
Payment

3.2.5 Guests

User can enter a number of guests seated at a table.

3.2.6 Discount

An order can avail of a discount. The user can manually enter a discount percentage or select a discount program provided. This affects the total amount of the order.



3.2.7 Enter Quantity/Discount/Price

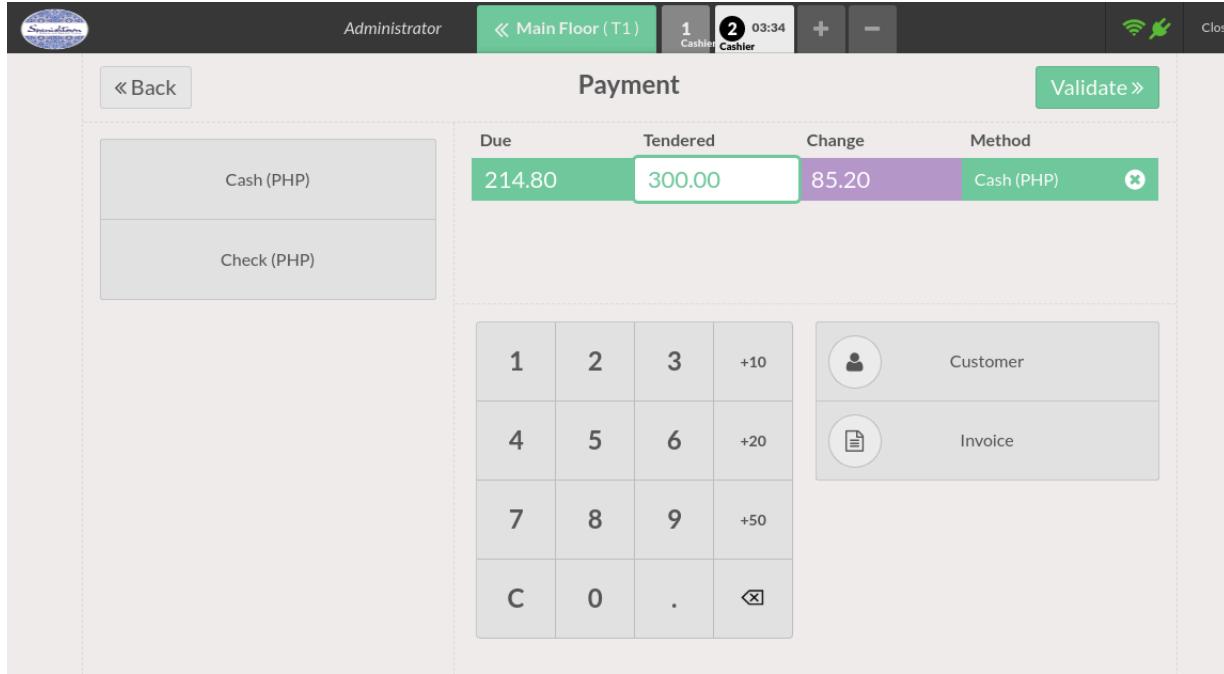
To change the quantity of an item, click on the **Qty** button. The button will then highlight in green meaning it is the active button. Click on the item in the shopping cart and then click on the corresponding number buttons to change quantity.

To change the avail a discount for a specific item, click on the **Disc** button. The button will then highlight in green meaning it is the active button. Click on the item in the shopping cart and then click on the corresponding number buttons to avail a discount percentage.

To change the price of an item, click on the **Price** button. The button will then highlight in green meaning it is the active button. Click on the item in the shopping cart and then click on the corresponding number buttons to change the item's price.

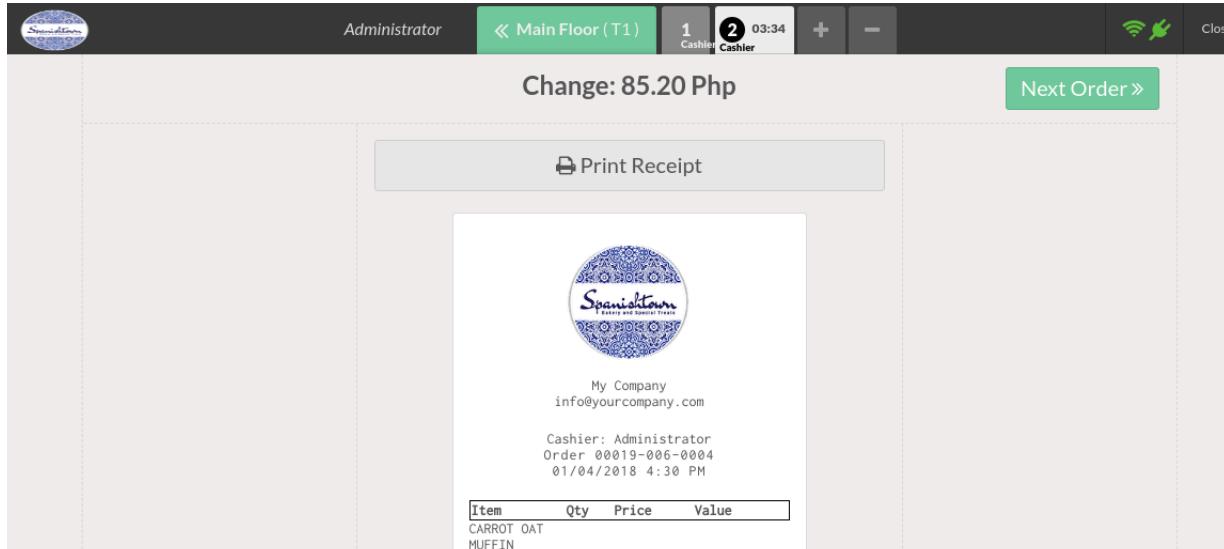
3.2.8 Payment

Click on the payment button to open the Payment page shown below. Select a payment method and enter the amount tendered.



The screenshot shows the Odoo POS payment screen. At the top, it displays the store name "Spanioltown", the user "Administrator", the location "Main Floor (T1)", and the cashier count "1 Cashier 2 03:34". Below this is a "Payment" button and a "Validate" button. The payment interface includes fields for "Due" (214.80), "Tendered" (300.00), "Change" (85.20), and "Method" (Cash (PHP)). On the left, there are buttons for "Cash (PHP)" and "Check (PHP)". On the right, there is a numeric keypad and a section for selecting a "Customer" (with an icon of a person) or an "Invoice" (with an icon of a document). The keypad has buttons for 1-9, 0, ., +10, +20, +50, and a clear/cancel button.

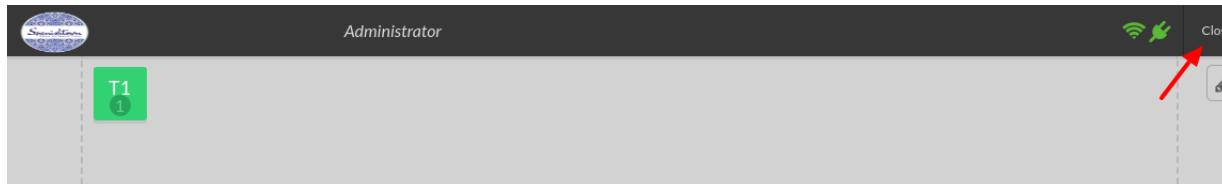
Click the **Validate** button on the upper right to validate the order and continue to the next order. The amount of change is shown and the user has the option to print the receipt.



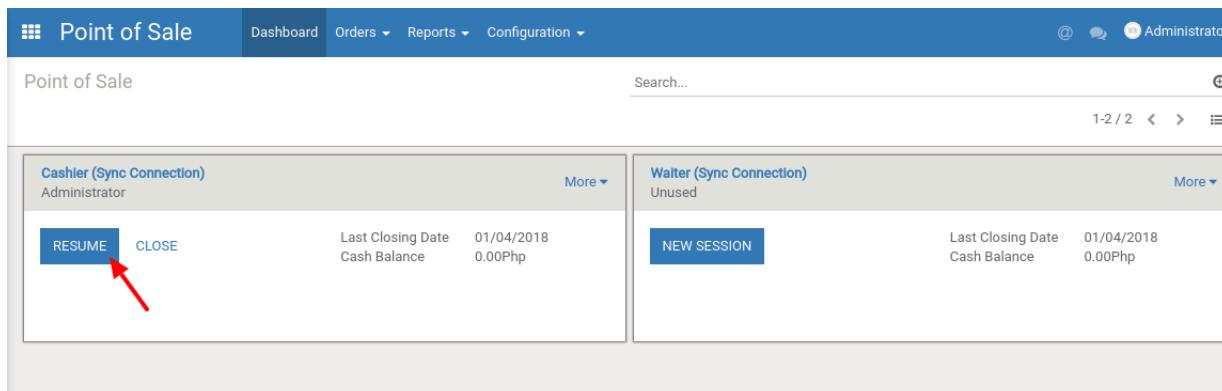
The screenshot shows the "Change: 85.20 Php" screen. At the top, it displays the store name "Spanioltown", the user "Administrator", the location "Main Floor (T1)", and the cashier count "1 Cashier 2 03:34". Below this is a "Next Order" button. The screen also includes a "Print Receipt" button and a receipt preview area. The receipt preview shows the company logo, the text "My Company info@yourcompany.com", and the transaction details: "Cashier: Administrator Order 00019-006-0004 01/04/2018 4:30 PM". At the bottom, there is a table of order items.

Item	Qty	Price	Value
CARROT OAT			
MUFFIN			

To exit out of the POS page click the **Close** button on the upper right corner and then click **Confirm** to go back to the Point of Sales Dashboard page.

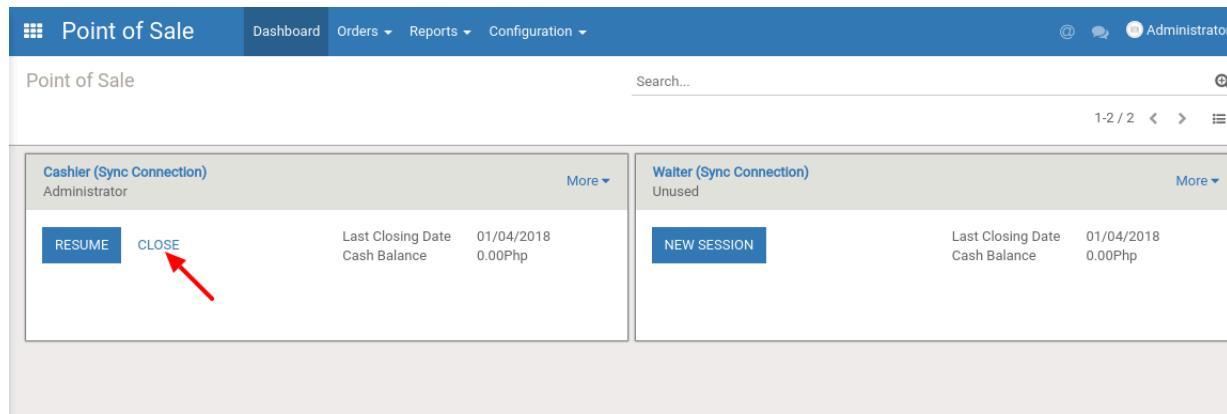


To resume the session, click the **Resume** button found in the Dashboard page of Point of Sales.

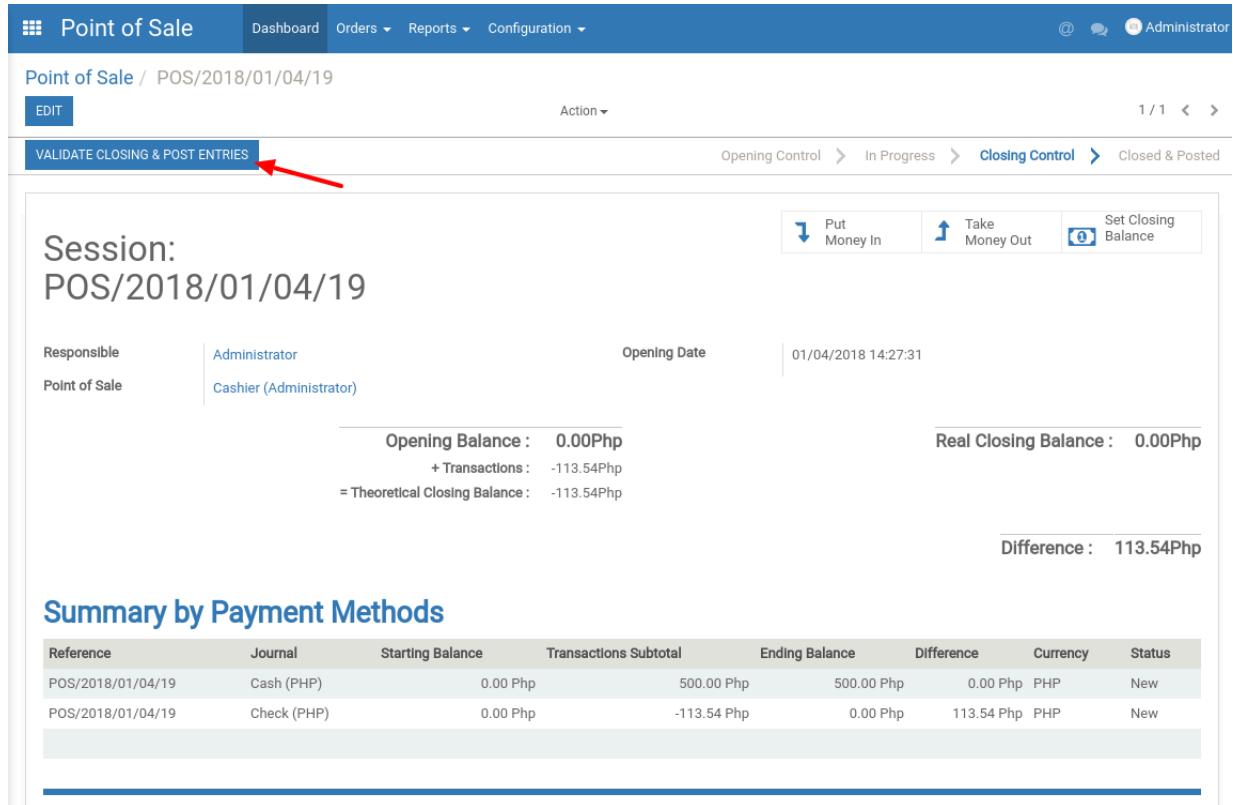


3.3 Closing Session

To end a session click the **Close** button for that session found at the Point of Sale Dashboard page.



It will display that session's information such as the opening and closing balance, difference, summary by payment methods, transactions and other criteria.



The screenshot shows the Odoo Point of Sale interface. At the top, there is a blue header bar with the 'Point of Sale' logo, 'Dashboard', 'Orders', 'Reports', 'Configuration', and a user icon. Below the header, the page title is 'Point of Sale / POS/2018/01/04/19'. There are buttons for 'EDIT', 'Action', and a page number '1 / 1'. A red arrow points to a blue button labeled 'VALIDATE CLOSING & POST ENTRIES' in the top navigation bar. The main content area displays session details: 'Session: POS/2018/01/04/19', 'Responsible: Administrator', 'Point of Sale: Cashier (Administrator)', 'Opening Date: 01/04/2018 14:27:31', and transaction summary: 'Opening Balance: 0.00Php', '+ Transactions: -113.54Php', '= Theoretical Closing Balance: -113.54Php', 'Real Closing Balance: 0.00Php', 'Difference: 113.54Php'. Below this is a section titled 'Summary by Payment Methods' with a table:

Reference	Journal	Starting Balance	Transactions Subtotal	Ending Balance	Difference	Currency	Status
POS/2018/01/04/19	Cash (PHP)	0.00 Php	500.00 Php	500.00 Php	0.00 Php	PHP	New
POS/2018/01/04/19	Check (PHP)	0.00 Php	-113.54 Php	0.00 Php	113.54 Php	PHP	New

Click the **Validate Closing & Post Entries** button to validate and record all transactions of the session. This changes the status of the session to Closed & Posted and ends the session.

3.4 Orders

Select the **Orders** submenu under the Order menu. A list of orders from the POS is displayed with their Receipt Reference, Customer, Order date, Salesman, Total, Status and Session in this page for viewing.

Point of Sale									
Dashboard Orders Reports Configuration Administrator (STB_01_04_2017_TRISH)									
Orders									
Search...									
1-2 / 2	<	>							
Order Ref	Receipt Ref	Customer	Order Date	Salesman	Total	Status	Session		
<input type="checkbox"/> Main/0002	Order 00019-001-0001		01/04/2018 16:52:15	Administrator	171.66	Paid	POS/2018/01/04/19		
<input type="checkbox"/> Main/0001	Order 00019-006-0004		01/04/2018 16:30:31	Administrator	214.80	Paid	POS/2018/01/04/19		
386.46									

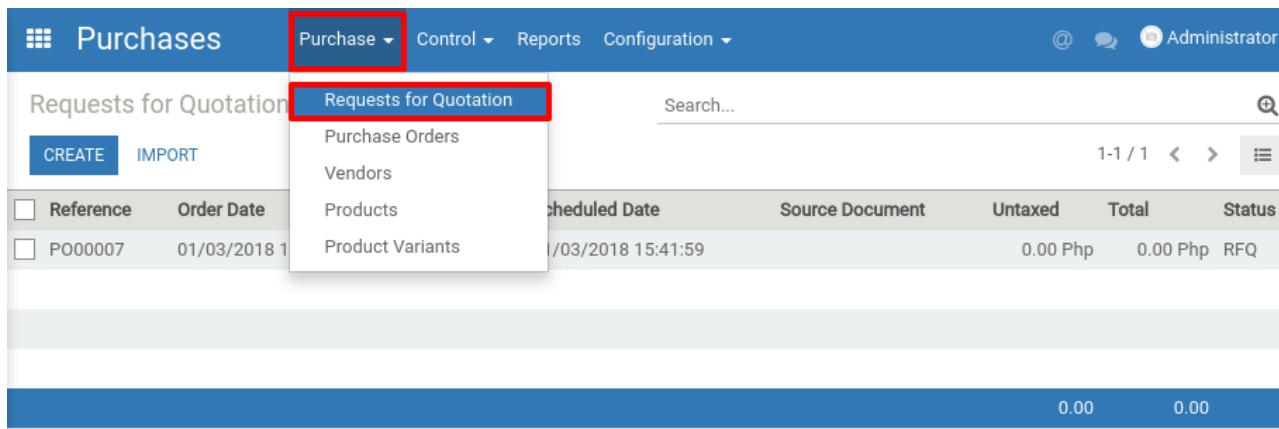
To view the sessions, select the **Sessions** submenu under the Orders menu. The Sessions page will display a list of sessions with their Session ID, Responsible, Opening Date, Closing Date, and Status for viewing.

Point of Sale					
Dashboard Orders Reports Configuration Administrator (STB_01_04_2017_TRISH)					
Sessions					
Search...					
1-15 / 15	<	>			
Point of Sale	Session ID	Responsible	Opening Date	Closing Date	Status
<input type="checkbox"/> Cashier (Administrator)	POS/2018/01/04/19	Administrator	01/04/2018 14:27:31	01/04/2018 17:03:08	Closing Control
<input type="checkbox"/> Waiter (not used)	POS/2018/01/04/18	Administrator	01/04/2018 14:11:56	01/04/2018 14:27:04	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2018/01/04/16	Administrator	01/04/2018 14:11:36	01/04/2018 14:11:45	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2018/01/04/14	Administrator	01/04/2018 14:10:22	01/04/2018 14:11:24	Closed & Posted
<input type="checkbox"/> Waiter (not used)	POS/2018/01/04/13	Administrator	01/04/2018 13:50:57	01/04/2018 14:04:05	Closed & Posted
<input type="checkbox"/> Waiter (not used)	POS/2018/01/04/12	Administrator	01/04/2018 13:42:30	01/04/2018 13:50:49	Closed & Posted
<input type="checkbox"/> Waiter (not used)	POS/2018/01/04/10	Administrator	01/04/2018 11:45:14	01/04/2018 11:56:47	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2018/01/04/09	Administrator	01/04/2018 11:44:57	01/04/2018 11:45:03	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2018/01/04/07	Administrator	01/04/2018 11:44:02	01/04/2018 11:44:43	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/06	Administrator	12/07/2017 10:22:31	12/07/2017 10:39:37	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/05	Administrator	12/07/2017 10:21:14	12/07/2017 10:21:47	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/04	Administrator	12/07/2017 10:12:03	12/07/2017 10:12:26	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/03	Administrator	12/07/2017 10:06:58	12/07/2017 10:07:53	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/02	Administrator	12/07/2017 08:56:35	12/07/2017 10:02:28	Closed & Posted
<input type="checkbox"/> Cashier (Administrator)	POS/2017/12/07/01	Administrator	12/07/2017 08:54:21	12/07/2017 08:56:16	Closed & Posted

4.0 Purchases

In the main menu , click **Purchases**. User should be navigated to the Purchase submenu page.

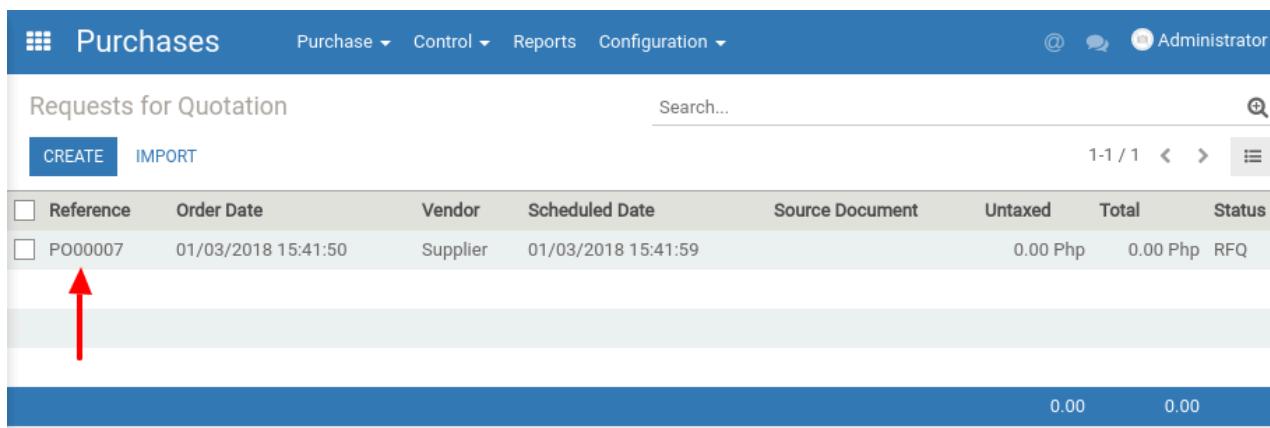
Click the **Requests for Quotation** submenu under **Purchases** menu. Page will display the Request for Quotation list table. **Requests for Quotation** is the default page of **Purchase** menu.



The screenshot shows the Odoo interface for the 'Purchases' module. The top navigation bar has 'Purchase' as the active menu item, indicated by a red box. A dropdown menu is open under 'Purchase', showing 'Requests for Quotation' as the selected option, also highlighted with a red box. The main content area displays a table for 'Requests for Quotation' with columns: Reference, Order Date, Vendor, Scheduled Date, Source Document, Untaxed, Total, and Status. A single row is visible with Reference 'PO00007' and Order Date '01/03/2018 15:41:59'.

4.1 Request for Quotation

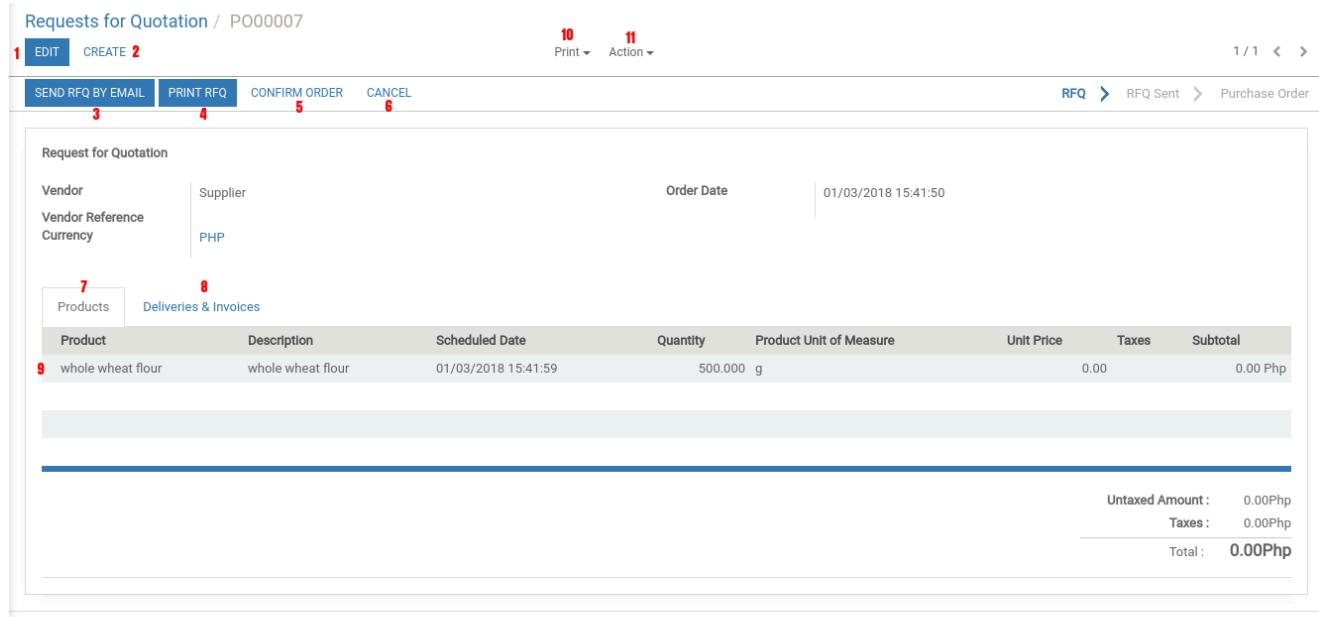
Click a certain request for quotation reference on the quotation table list. The Purchase order detail page should be displayed.



The screenshot shows the same Odoo interface as the previous one, but with a red arrow pointing to the 'Reference' column of the first row in the 'Requests for Quotation' table. This row corresponds to the 'PO00007' entry.

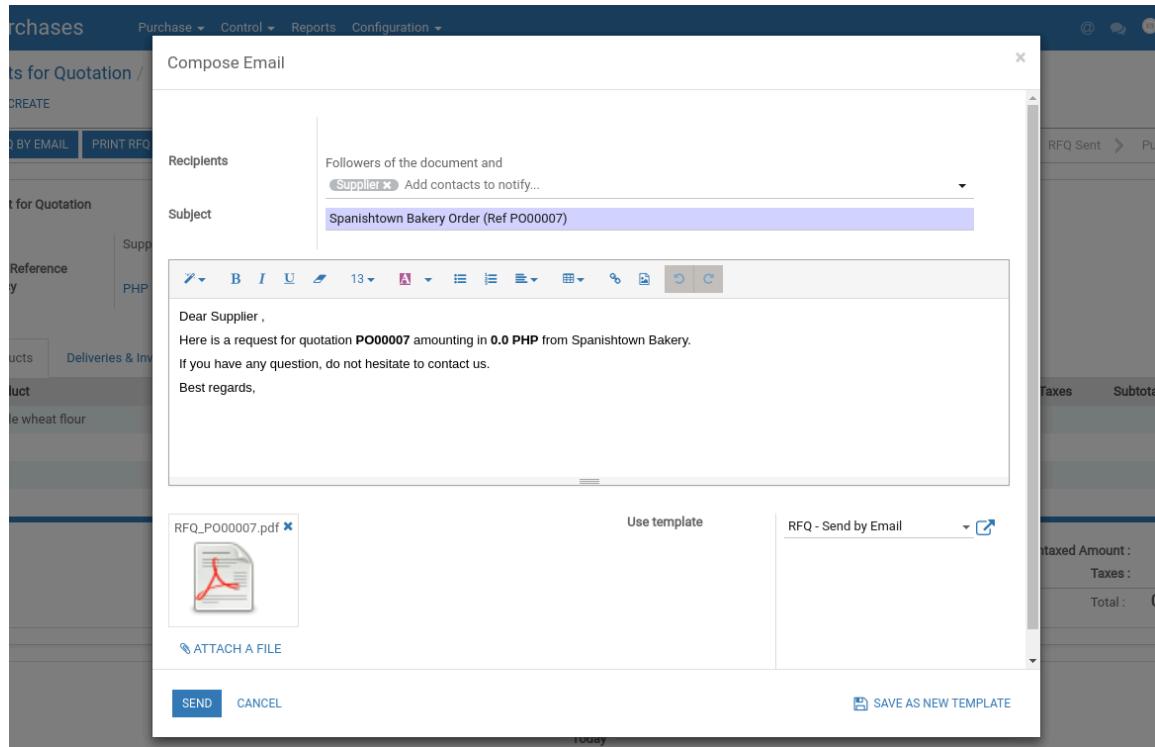
4.1.2 Purchase Order Details

Purchase Order Details will look like on the image below.

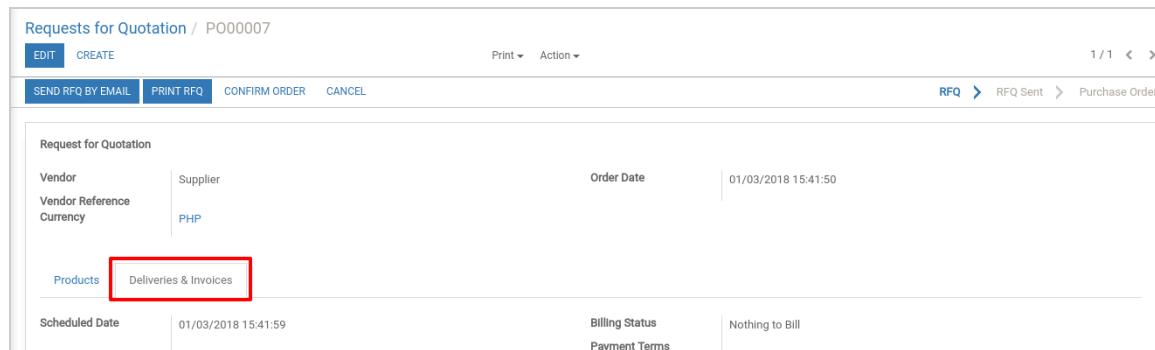


The following buttons below and an explanation of its function:

1. Click the **Edit** button. User can successfully edit the data in Purchase order details
2. Click the **Create** button. Clicking create button will successfully create/ add new Purchase order
3. Click the **Send RFQ by Email** button. Click **Send RFQ by email** will open a modal for composing email and the user will have the option to add content for the email creation.

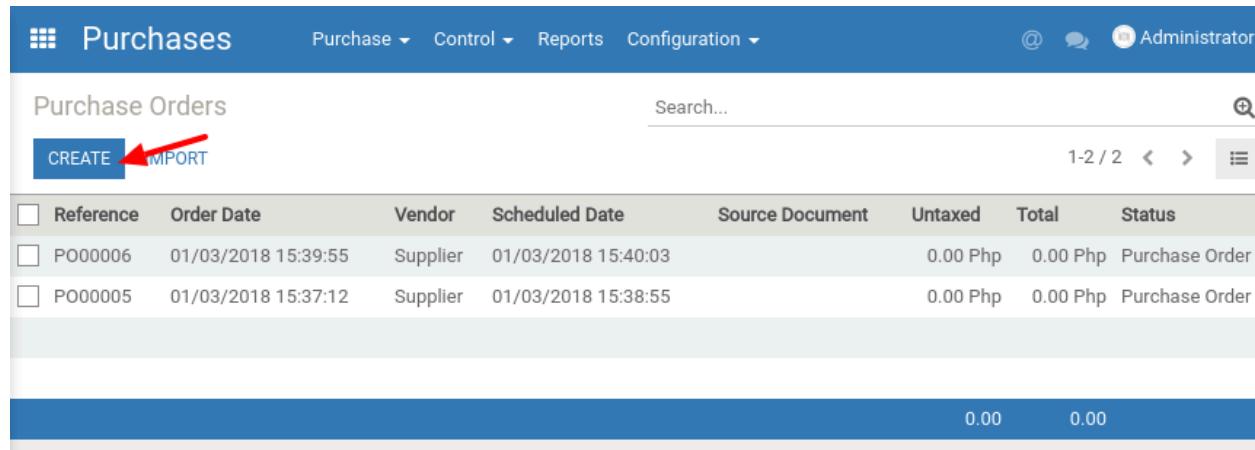


4. Click the **Print RFQ** button. Clicking the Print RFQ button will successfully print the RFQ
5. Click the **Confirm Order** button. Clicking the Confirm Order button will successfully Confirm the Purchase order details
6. Click the **Cancel** button. Click Cancel button will successfully cancel the created Purchase Order
7. **Products** tab, add product/ item on the product table. Products is a default displayed in Request for Quotation tab and product/item are being added.
8. **Deliveries and Invoices** tab. Click the Deliveries and Invoices tab will display the deliveries and invoices details.



4.2 Purchase Orders

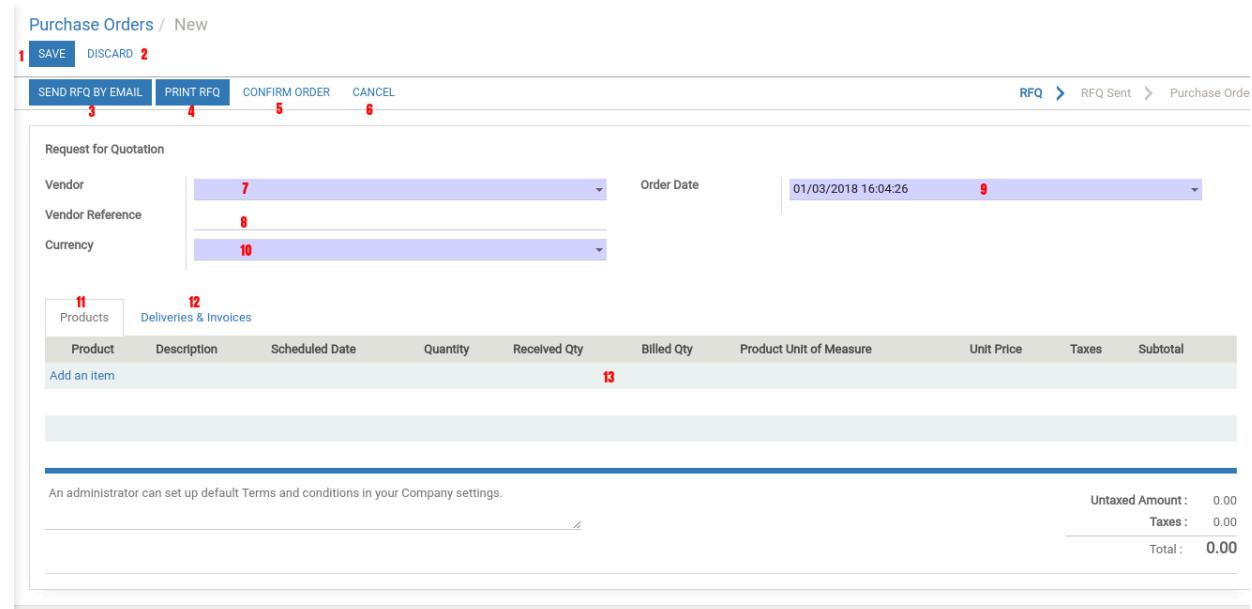
Click the **Purchase Orders** submenu under the Purchase menu. User will be directed to Purchase Orders page and will also display the purchase orders list if available.



The screenshot shows the Odoo 'Purchases' module. The top navigation bar includes 'Purchase', 'Control', 'Reports', and 'Configuration'. The main area is titled 'Purchase Orders' with a search bar. Below is a table of purchase orders with columns: Reference, Order Date, Vendor, Scheduled Date, Source Document, Untaxed, Total, and Status. Two entries are listed: PO00006 and PO00005, both marked as 'Purchase Order'. The total values at the bottom are 0.00 and 0.00. The 'CREATE' button is highlighted with a red arrow.

4.2.1 Create Purchase orders

Click the **Create** button. It will display the following fields for creating new Purchase orders.



The screenshot shows the 'Purchase Orders / New' creation form. At the top, there are buttons for 'SAVE' (1) and 'DISCARD' (2). Below are buttons for 'SEND RFQ BY EMAIL' (3), 'PRINT RFQ' (4), 'CONFIRM ORDER' (5), and 'CANCEL' (6). The main section is titled 'Request for Quotation' and includes fields for 'Vendor' (7), 'Vendor Reference' (8), and 'Currency' (10). To the right, 'Order Date' (9) is set to 01/03/2018 16:04:26. Below this is a table for 'Products' (11) and 'Deliveries & Invoices' (12). The table has columns: Product, Description, Scheduled Date, Quantity, Received Qty, Billed Qty, Product Unit of Measure, Unit Price, Taxes, and Subtotal. A row for 'Add an item' (13) is shown. At the bottom, a note states: 'An administrator can set up default Terms and conditions in your Company settings.' The total amounts are listed as Untaxed Amount: 0.00, Taxes: 0.00, and Total: 0.00.

The following buttons found above and an explanation of its function:

1. Click the **Save** button. Clicking Save Button will successfully save the Purchase Order.
2. Click the **Discard** button. Clicking the Discard button will cancel or discard the creating new Purchase order
3. Click the **Send RFQ by Email** button. Clicking the Send RFQ by Email will displayed a modal for compose Email
4. Click the **Print RFQ** button. Clicking the Print RFQ button will download as .pdf
5. Click the **Confirm Order** button. Clicking the Confirm Order button will successfully confirmed the purchase order
6. Click the **Cancel** button. Clicking Cancel button will successfully cancel the creating new Purchase Order
Users will be asked to enter or choose the following fields:
 7. Choose **Vendor**.
 8. Enter **Vendor Reference**.
 9. Choose **Order Date**.
 10. Choose **Currency**. This is automatic when Vendor is selected.
 11. Enter **Products**. Products should be entered on the products tab
 12. Click the **Deliveries & Invoices** tab. Screen will load the invoices and delivery details.
 13. Click the **Add an Item** option on the Products tab. Clicking the Add an Item will display the following fields below. These fields will populate automatically after the user chooses an item on the product option list.
 - a. Product
 - b. Description
 - c. Scheduled Date
 - d. Quantity
 - e. Product Unit of Measurement
 - f. Unit Price

Purchase Orders / New

SAVE DISCARD

SEND RFQ BY EMAIL PRINT RFQ CONFIRM ORDER CANCEL RFQ > RFQ Sent > Purchase Order

Request for Quotation

Vendor	Supplier	Order Date	01/03/2018 16:04:26
Vendor Reference			
Currency	PHP	[edit]	

Products Deliveries & Invoices

Product	Description	Scheduled Date	Quantity	Received Qty	Billed Qty	Product Unit of Measure	Unit Price	Taxes	Subtotal
a	b	c	d 0.000	0.000	0.000	e	f 0.00	0.00	0.00
Add an item									

4.3 Vendors

Click the **Vendors** submenu under the Purchase menu. Page will display the available vendors on the vendors page.

Purchases Purchase ▾ Control ▾ Reports Configuration ▾ @ Search... Administrator

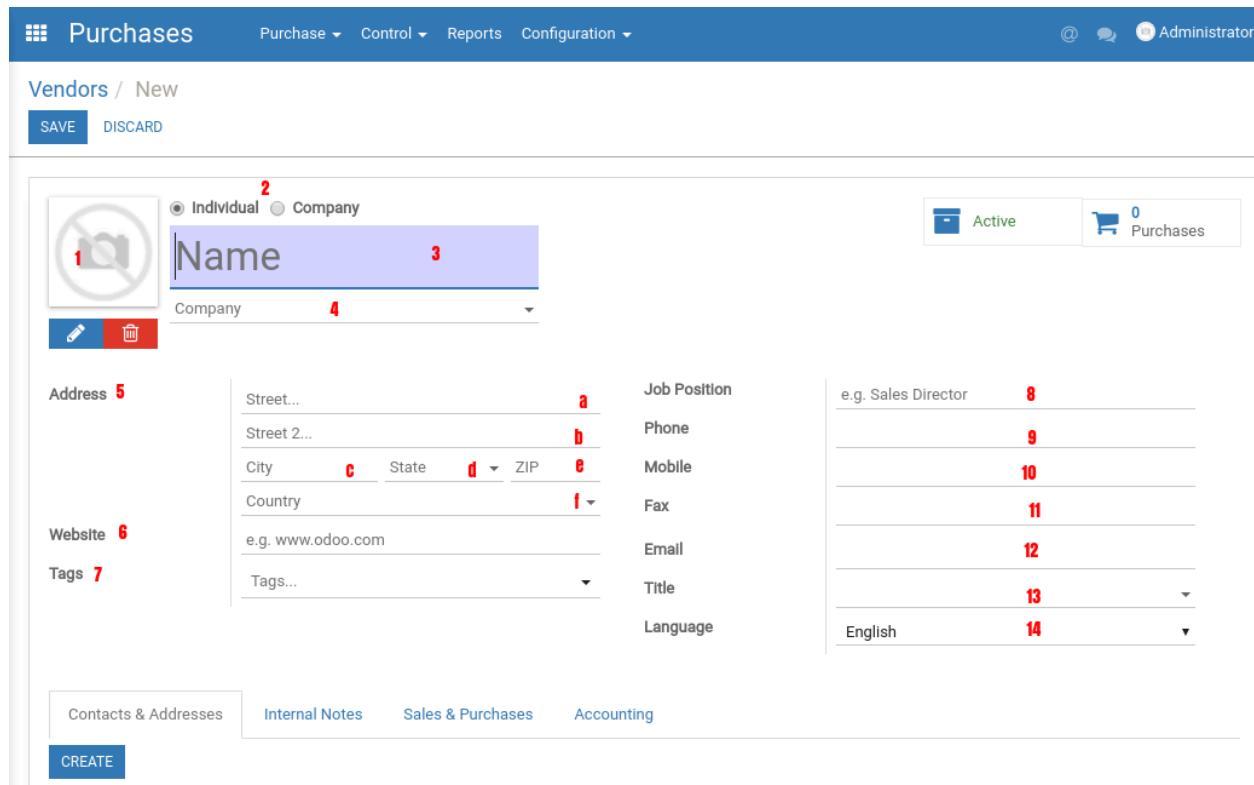
Vendors Search...

CREATE 1-3 / 3

 Chefs & Bakers Bacolod City	 Dumaguete Fruits Co. Dumaguete City
 Supplier leoriceanthrax@gmail.com	

4.3.1 Create Vendor

Click the **Create** button under the Vendors label. Page will display the following fields for creating a Vendor account.



Purchases Purchase ▾ Control ▾ Reports Configuration ▾ Administrator

Vendors / New **SAVE** **DISCARD**

2 Individual Company

1 **Name** 3

4 Company

5 Address 5

6 Website 6

7 Tags 7

8 Job Position

9 Phone

10 Mobile

11 Fax

12 Email

13 Title

14 Language

15 English

16 Contacts & Addresses Internal Notes Sales & Purchases Accounting

CREATE

User will be asked to enter or choose the following fields:

1. Click the **Camera Icon/ Profile** option. User can upload it's company profile picture.
2. Choose **Individual** or **Company** option.
3. Enter **Company** name.
4. If the Individual option is selected, choose **Company** option.
5. Enter **Address** with the following fields below:
 - a. Street
 - b. Street2
 - c. City
 - d. State

e. Zip

f. Country

6. Enter **Website** link.
7. Choose **Tags** value.
8. Enter **Job Position** name.
9. Enter **Phone** number.
10. Enter **Mobile** number.
11. Enter **Fax** number.
12. Enter **Email** address.
13. Choose **Title** value.
14. Choose **Language** option.

Click the **Save** button to save the created new vendors and click the **Discard** otherwise.

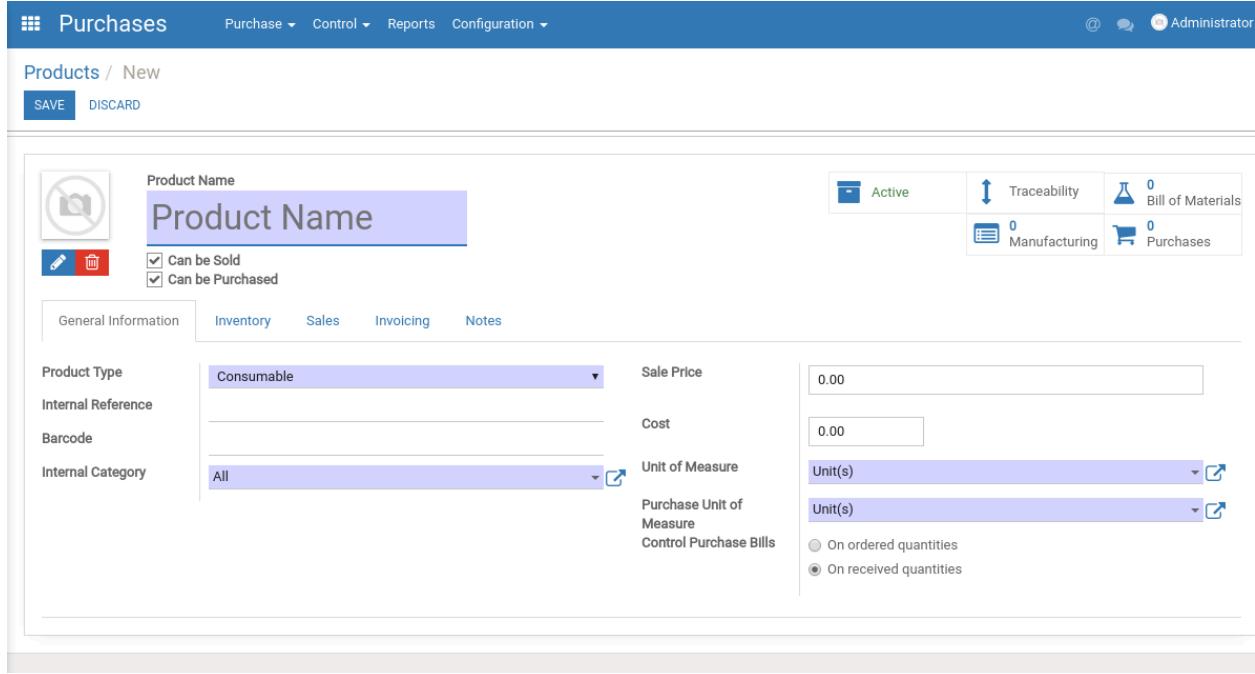
4.4 Products

Click the **Products** submenu under the purchase menu. Page will display the List of products that are available.

Products		
<input checked="" type="checkbox"/> Can be Purchased <input type="checkbox"/> Search...		
CREATE	1-40 / 173	
 active dry yeast Price: 0.00Php On hand: 0.000 g	 all of the poolish Price: 0.00Php On hand: 0.000 Unit(s)	 almond/cashew flour Price: 0.00Php On hand: 0.000 g
 aml Price: 0.00Php	 ap cream Price: 0.00Php On hand: 0.000 g	 ap flour Price: 0.00Php On hand: 0.000 g
 baguette mix Price: 0.00Php On hand: 0.000 g	 baking powder Price: 0.00Php On hand: 0.000 g	 baking soda Price: 0.00Php On hand: 0.000 g
 banana Price: 0.00Php On hand: 0.000 pc	 banana nut muffins Price: 0.00Php On hand: 0.000 Unit(s)	 berries Price: 0.00Php On hand: 0.000 g
 BERRY SWIRL CHEESECAKE Price: 0.00Php On hand: 0.000 wh (12 Slices)	 bittersweet chocolate, chopped Price: 0.00Php On hand: 0.000 g	 BLUEBERRY CHEESECAKE (Whole) Price: 0.00Php On hand: 0.000 wh (10 slices)

4.4.1 Create Products

Click the Create button under the Products label. Page will display the following fields for creating a new Product.



Users will be asked to enter or choose the following fields.

Upload product image by clicking the camera icon. The uploaded image should display the preview after the successful upload.

Enter Product Name.

Choose option value whether the item is **Can be Sold** or **Can be Purchased**.

General Information tab. This is the default tab on create product page (some of the fields are optional).

Choose **Product Type**.

Choose **Internal Preference**.

Enter **Barcode**.

Choose **Internal Category**.

Enter **Cost** value. Value cost of the product created.

Choose **Unit of Measure** for the product.

Choose **Purchase Unit of Measure** value.

Choose **Control Purchase**.

Choose **Bill** option.

Inventory tab. The page will display the inventory details of the added products.

Sales tab. The page will display the sales details of the added products.

Variants tab. Page will display the variants of the added product on the list.

Notes tab. Page will display the notes pertaining to the created products.

Click the **Save** button to save the created new products and click the **Discard** otherwise.

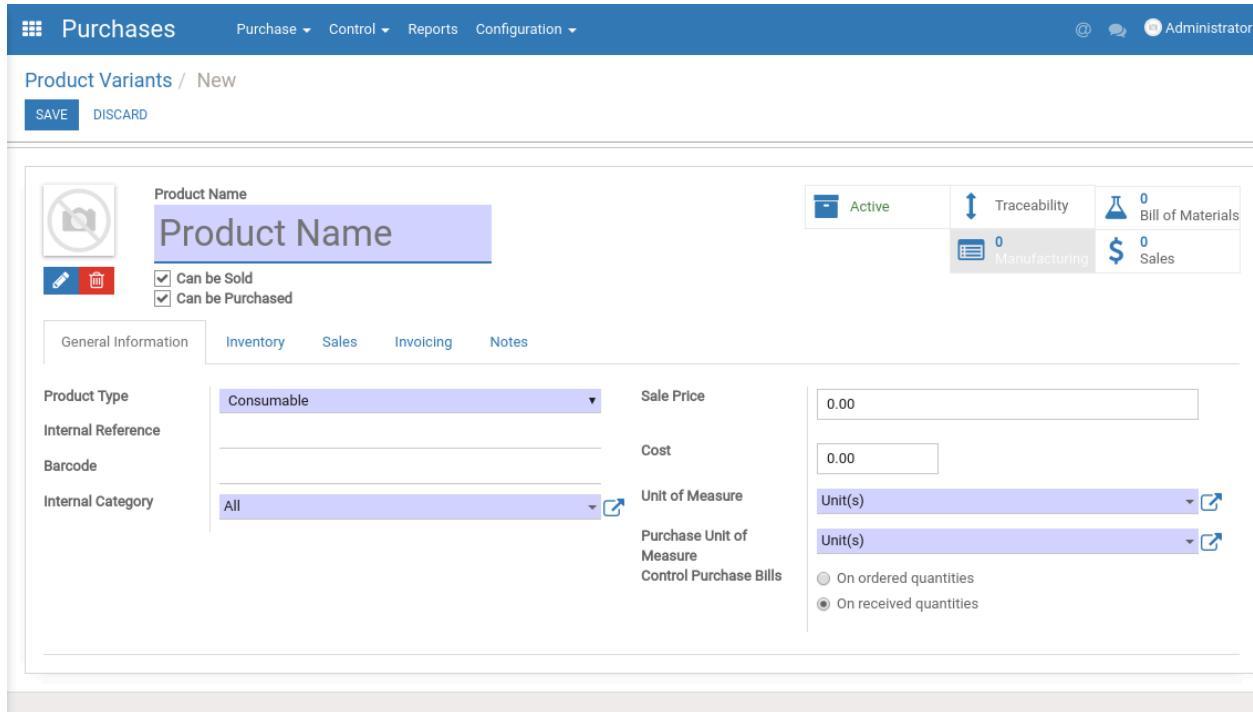
4.5 Product Variants

Click the **Product Variants** submenu. Page will display the Product Variants details for each created product on the Product Variants table list.

Product Variants					
		Can be Purchased	Search...		
CREATE IMPORT		1-80 / 173			
<input type="checkbox"/>	active dry yeast	0.00	0.000	0.000	g
<input type="checkbox"/>	all of the poolish	0.00	0.000	0.000	Unit(s)
<input type="checkbox"/>	almond/cashew flour	0.00	0.000	500.000	g
<input type="checkbox"/>	ami	0.00	0.000	0.000	Unit(s)
<input type="checkbox"/>	ap cream	0.00	0.000	0.000	g
<input type="checkbox"/>	ap flour	0.00	0.000	0.000	g
<input type="checkbox"/>	baguette mix	0.00	0.000	0.000	g
<input type="checkbox"/>	baking powder	0.00	0.000	0.000	g
<input type="checkbox"/>	baking soda	0.00	0.000	0.000	g
<input type="checkbox"/>	banana	0.00	0.000	0.000	pc
<input type="checkbox"/>	banana nut muffins	0.00	0.000	-30.000	Unit(s)
<input type="checkbox"/>	berries	0.00	0.000	0.000	g
<input type="checkbox"/>	BERRY SWIRL CHEESECAKE	0.00	0.000	0.000	wh (12 Slices)

4.5.1 Create New Product Variants

Click the **Create** button under the Product Variants label. Creation of Product Variants fields are displayed on the image below.



The screenshot shows the Odoo Purchases module with the 'Product Variants / New' screen. The 'Product Name' field is highlighted in blue. Other fields like 'Active', 'Traceability', and 'Bill of Materials' are also visible.

Users will be asked to enter or choose the following fields.

Upload product image by clicking the camera icon. Uploaded image should display the preview after the successful upload.

Enter **Product Name**.

Choose option value whether the item is **Can be Sold** or **Can be Purchased**.

General Information tab. This is the default tab on create product page (some of the fields are optional).

Choose **Product Type**.

Choose **Internal Preference**.

Enter **Barcode**.

Choose the **Internal Category**.

Enter **Cost** value. Value cost of the product created.

Choose **Unit of Measure** for the product.

Choose **Purchase Unit of Measure** value.

Choose **Control Purchase**.

Choose **Bill** option.

Inventory tab. The page will display the inventory details of the added products.

Sales tab. The page will display the sales details of the added products.

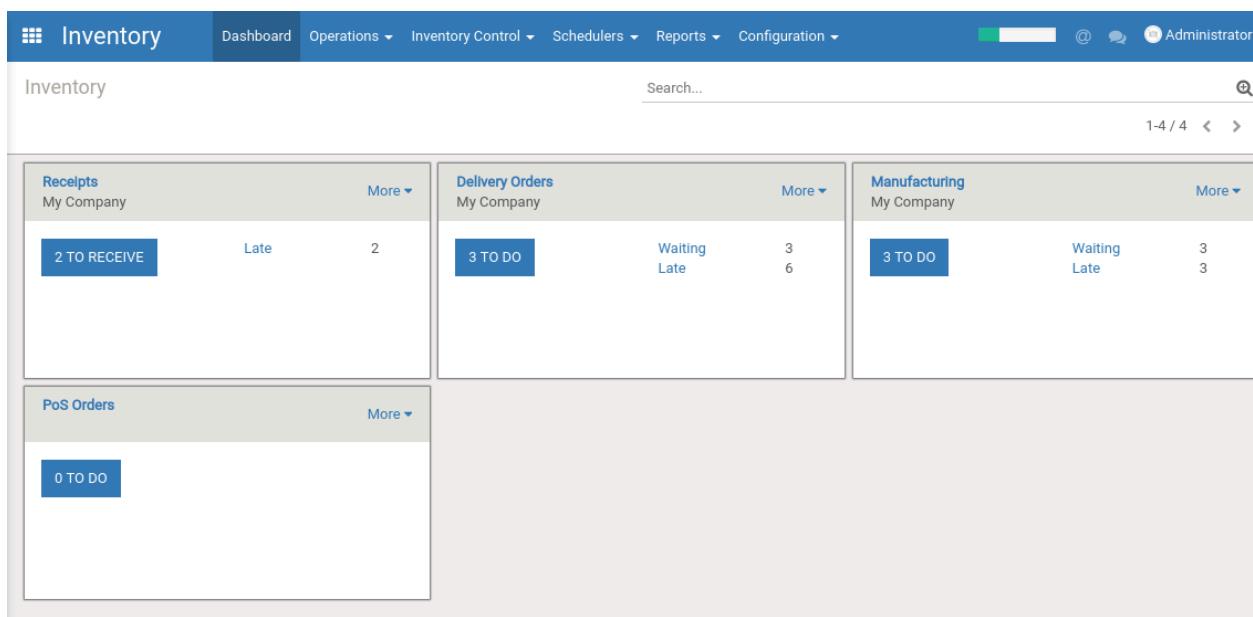
Notes tab. The page will display the notes pertaining to the created products.

Click the **Save** button to save the created new products and click the **Discard** otherwise.

5.0 Inventory

Click the **Inventory** menu option. Page should loaded on the Inventory Dashboard page.

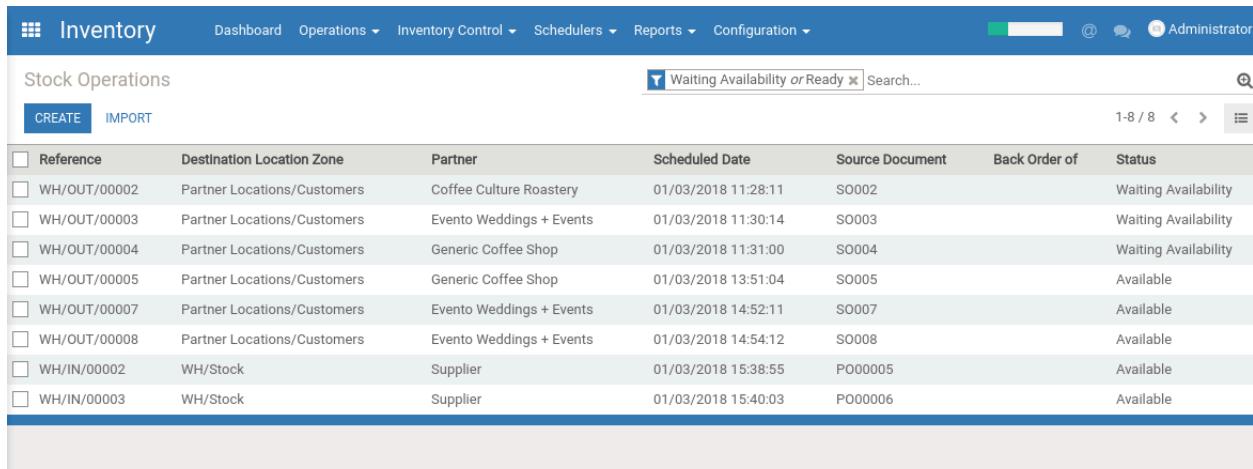
Dashboard page is the default page after clicking the Inventory menu option. Dashboard Inventory have 3 section the Receipt, Delivery Orders and Manufacturing boards. It should look like the screen below.



The screenshot shows the Odoo Inventory Dashboard. The top navigation bar includes 'Inventory', 'Dashboard', 'Operations', 'Inventory Control', 'Schedulers', 'Reports', 'Configuration', and user information. The main area is titled 'Inventory' and features a search bar. Below are three main sections: 'Receipts' (2 TO RECEIVE, Late 2), 'Delivery Orders' (3 TO DO, Waiting Late 3/6), and 'Manufacturing' (3 TO DO, Waiting Late 3/3). A fourth section, 'PoS Orders' (0 TO DO), is partially visible at the bottom.

5.1 Operations

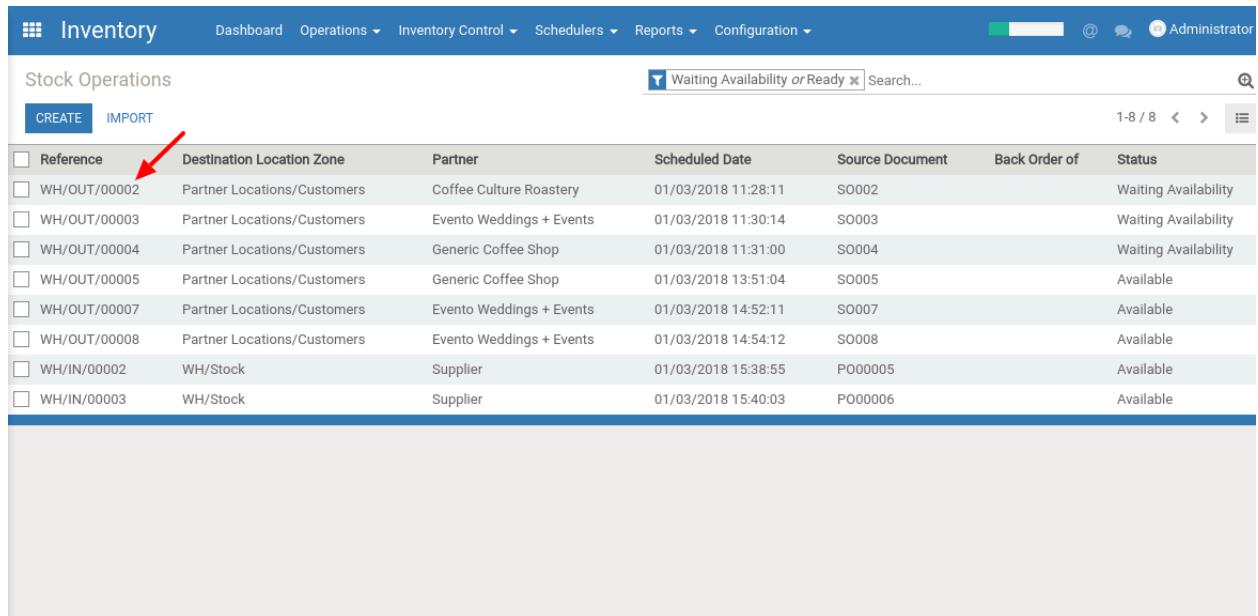
Clicking the **All Transfer** submenu option under the Operations menu. The page will display the Stock Operation details of the products.



<input type="checkbox"/> Reference	Destination Location Zone	Partner	Scheduled Date	Source Document	Back Order of	Status
<input type="checkbox"/> WH/OUT/00002	Partner Locations/Customers	Coffee Culture Roastery	01/03/2018 11:28:11	SO002		Waiting Availability
<input type="checkbox"/> WH/OUT/00003	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 11:30:14	SO003		Waiting Availability
<input type="checkbox"/> WH/OUT/00004	Partner Locations/Customers	Generic Coffee Shop	01/03/2018 11:31:00	SO004		Waiting Availability
<input type="checkbox"/> WH/OUT/00005	Partner Locations/Customers	Generic Coffee Shop	01/03/2018 13:51:04	SO005		Available
<input type="checkbox"/> WH/OUT/00007	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 14:52:11	SO007		Available
<input type="checkbox"/> WH/OUT/00008	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 14:54:12	SO008		Available
<input type="checkbox"/> WH/IN/00002	WH/Stock	Supplier	01/03/2018 15:38:55	PO00005		Available
<input type="checkbox"/> WH/IN/00003	WH/Stock	Supplier	01/03/2018 15:40:03	PO00006		Available

5.1.1 Click Stock Reference Number

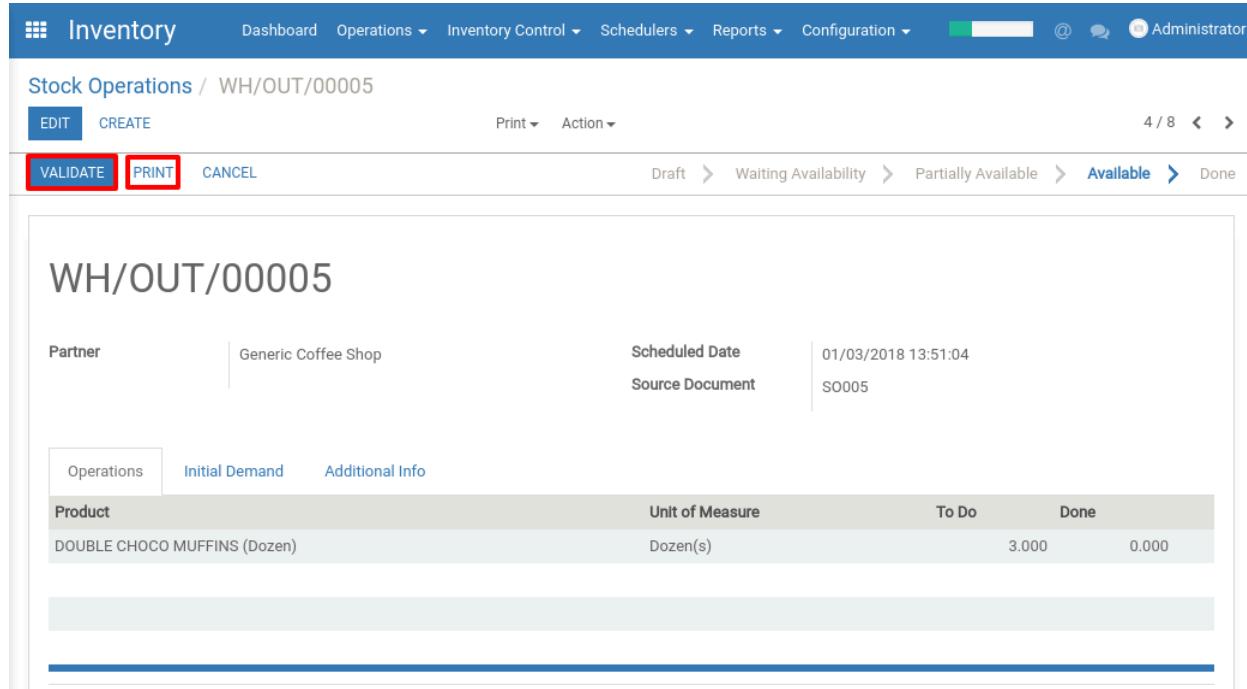
Clicking the **Stock Reference Number** a modal will display the stock reference number's details.



<input type="checkbox"/> Reference	Destination Location Zone	Partner	Scheduled Date	Source Document	Back Order of	Status
<input type="checkbox"/> WH/OUT/00002	Partner Locations/Customers	Coffee Culture Roastery	01/03/2018 11:28:11	SO002		Waiting Availability
<input type="checkbox"/> WH/OUT/00003	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 11:30:14	SO003		Waiting Availability
<input type="checkbox"/> WH/OUT/00004	Partner Locations/Customers	Generic Coffee Shop	01/03/2018 11:31:00	SO004		Waiting Availability
<input type="checkbox"/> WH/OUT/00005	Partner Locations/Customers	Generic Coffee Shop	01/03/2018 13:51:04	SO005		Available
<input type="checkbox"/> WH/OUT/00007	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 14:52:11	SO007		Available
<input type="checkbox"/> WH/OUT/00008	Partner Locations/Customers	Evento Weddings + Events	01/03/2018 14:54:12	SO008		Available
<input type="checkbox"/> WH/IN/00002	WH/Stock	Supplier	01/03/2018 15:38:55	PO00005		Available
<input type="checkbox"/> WH/IN/00003	WH/Stock	Supplier	01/03/2018 15:40:03	PO00006		Available

Click the **Validate** button to validate the Stock Operation transactions.

Click the **Print** button to download the Stock Operation transactions and click the **Cancel** button to cancel the stock operation for the transaction.



5.2 Inventory Control

Inventory Control menu has the following submenu options: Products, Product Variants, Reordering Rules, Inventory Adjustments, Scrap, and Lots/Serial Numbers. Each submenu will be explained on the following pages.

5.2.1 Products

Click the **Products** submenu under the Inventory Control menu. Page will load to the products page and all products are listed in this page.

Inventory		Dashboard	Operations	Inventory Control	Schedulers	Reports	Configuration	Logout												
<div> <p>Products</p> <p>CREATE</p> <table border="1"> <tbody> <tr> <td> active dry yeast Price: 0.00Php On hand: 0.000 g</td> <td> all of the polish Price: 0.00Php On hand: 0.000 Unit(s)</td> <td> almond/cashew flour Price: 0.00Php On hand: 0.000 g</td> </tr> <tr> <td> AMERICANO Price: 0.00Php</td> <td> amli Price: 0.00Php</td> <td> ap cream Price: 0.00Php On hand: 0.000 g</td> </tr> <tr> <td> ap flour Price: 0.00Php On hand: 0.000 g</td> <td> baguette mix Price: 0.00Php On hand: 0.000 g</td> <td> baking powder Price: 0.00Php On hand: 0.000 g</td> </tr> <tr> <td> baking soda Price: 0.00Php On hand: 0.000 g</td> <td> banana Price: 0.00Php On hand: 0.000 pc</td> <td> banana nut muffins Price: 0.000Php On hand: 0.000 Unit(s)</td> </tr> <tr> <td> berries Price: 0.00Php On hand: 0.000 g</td> <td> BERRY SWIRL CHEESECAKE Price: 0.00Php On hand: 0.000 wh (12 Slices)</td> <td> BERRY WHIPPED CREAM FROSTING Price: 0.000Php</td> </tr> <tr> <td> bittersweet chocolate, chopped</td> <td> BUFFALO BERRY CHEESECAKE (Slice)</td> <td> BUFFALO BERRY CHEESECAKE (Whole)</td> </tr> </tbody> </table> </div>	 active dry yeast Price: 0.00Php On hand: 0.000 g	 all of the polish Price: 0.00Php On hand: 0.000 Unit(s)	 almond/cashew flour Price: 0.00Php On hand: 0.000 g	 AMERICANO Price: 0.00Php	 amli Price: 0.00Php	 ap cream Price: 0.00Php On hand: 0.000 g	 ap flour Price: 0.00Php On hand: 0.000 g	 baguette mix Price: 0.00Php On hand: 0.000 g	 baking powder Price: 0.00Php On hand: 0.000 g	 baking soda Price: 0.00Php On hand: 0.000 g	 banana Price: 0.00Php On hand: 0.000 pc	 banana nut muffins Price: 0.000Php On hand: 0.000 Unit(s)	 berries Price: 0.00Php On hand: 0.000 g	 BERRY SWIRL CHEESECAKE Price: 0.00Php On hand: 0.000 wh (12 Slices)	 BERRY WHIPPED CREAM FROSTING Price: 0.000Php	 bittersweet chocolate, chopped	 BUFFALO BERRY CHEESECAKE (Slice)	 BUFFALO BERRY CHEESECAKE (Whole)	 Products	Search...
 active dry yeast Price: 0.00Php On hand: 0.000 g	 all of the polish Price: 0.00Php On hand: 0.000 Unit(s)	 almond/cashew flour Price: 0.00Php On hand: 0.000 g																		
 AMERICANO Price: 0.00Php	 amli Price: 0.00Php	 ap cream Price: 0.00Php On hand: 0.000 g																		
 ap flour Price: 0.00Php On hand: 0.000 g	 baguette mix Price: 0.00Php On hand: 0.000 g	 baking powder Price: 0.00Php On hand: 0.000 g																		
 baking soda Price: 0.00Php On hand: 0.000 g	 banana Price: 0.00Php On hand: 0.000 pc	 banana nut muffins Price: 0.000Php On hand: 0.000 Unit(s)																		
 berries Price: 0.00Php On hand: 0.000 g	 BERRY SWIRL CHEESECAKE Price: 0.00Php On hand: 0.000 wh (12 Slices)	 BERRY WHIPPED CREAM FROSTING Price: 0.000Php																		
 bittersweet chocolate, chopped	 BUFFALO BERRY CHEESECAKE (Slice)	 BUFFALO BERRY CHEESECAKE (Whole)																		
1-40 / 234								Administrator												

5.2.1.1 Create Products

Click the **Create** button under the Products label. The page will display the following fields for creating a new Product.

Inventory

Dashboard Operations ▾ Inventory Control ▾ Schedulers ▾ Reports ▾ Configuration ▾

Administrator

Products / New

SAVE **DISCARD**

UPDATE QTY ON HAND

Product Name

Product Name

Can be Sold
 Can be Purchased

General Information **Inventory** Sales Invoicing Notes

Product Type Stockable Product **Sale Price** 0.00

Internal Reference

Barcode

Internal Category All **Unit of Measure**

Purchase Unit of Measure

Control Purchase Bills

Traceability

On Hand 0 **Forecasted** 0

Reordering Rules 0 **Bill of Materials** 0

Manufacturing 0 **Purchases** 0

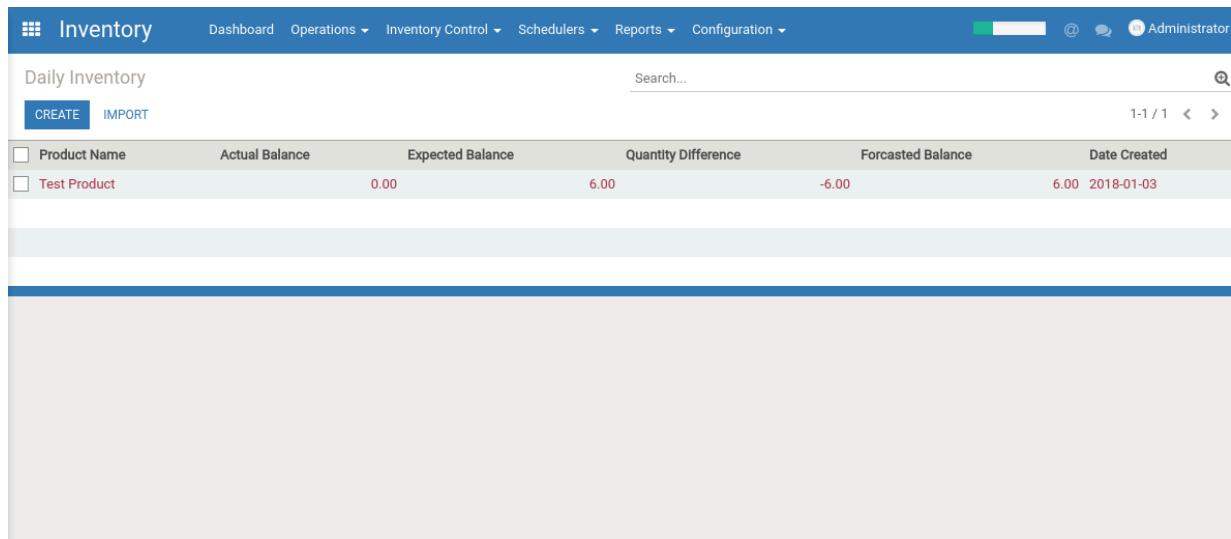
User will be asked to enter or choose the following fields:

- Upload product image by clicking the camera icon.
Uploaded image should display the preview after the successful upload.
- Enter **Product Name**.
- Choose option value whether the item is **Can be Sold** or **Can be Purchased**.
- **General Information** tab. This is the default tab on create product page (some of the fields are optional).
- Choose **Product Type**.
- Choose **Internal Preference**.
- Enter **Barcode**.
- Choose **Internal Category**.
- Enter **Cost** value. Value cost of the product created.
- Choose **Unit of Measure** for the product.
- Choose **Purchase Unit of Measure** value.
- Choose **Control Purchase**.
- Choose **Bill** option.
- **Inventory** tab. The page will display the inventory details of the added products.
- **Sales** tab. The page will display the sales details of the added products.
- **Variants** tab. The page will display the variants of the added product on the list.
- **Notes** tab. The page will display the notes pertaining to the created products.

Click the **Save** button to save the created new products and click the **Discard** otherwise.

5.2.2 Daily Inventory

Click the **Daily Inventory** submenu option under the Inventory Control label. Page will load to the Daily Inventory page and table will list all product inventory details.



<input type="checkbox"/>	Product Name	Actual Balance	Expected Balance	Quantity Difference	Forecasted Balance	Date Created
<input type="checkbox"/>	Test Product	0.00	6.00	-6.00	6.00	2018-01-03

5.2.3 Product Variants

Click the **Product Variants** sub menu under the Inventory Control menu. Page will display the Product Variants details for each created products on the Product Variants table list.

Inventory

Product Variants

Search... 🔍

1-80 / 234 ◀ ▶ ☰

CREATE IMPORT

Internal Reference	Name	Sale Price	Quantity On Hand	Forecast Quantity	Unit of Measure	Barcode
□ MISC	Test Product	0.00	8.000	8.000	Unit(s)	
□	active dry yeast	0.00	0.000	0.000	g	
□	all of the poolish	0.00	0.000	0.000	Unit(s)	
□	almond/cashew flour	0.00	0.000	500.000	g	
□	AMERICANO	0.00	0.000	0.000	1 glass	
□	ami	0.00	0.000	0.000	Unit(s)	
□	ap cream	0.00	0.000	0.000	g	
□	ap flour	0.00	0.000	0.000	g	
□	baguette mix	0.00	0.000	0.000	g	
□	baking powder	0.00	0.000	0.000	g	
□	baking soda	0.00	0.000	0.000	g	

5.2.3.1 Create New Product Variants

Click the **Create** button under the Product Variants label. Creation of Product Variants fields are display on the image below.

Inventory

Product Variants / New

SAVE DISCARD

	Product Name <input type="text" value="Product Name"/> <input type="checkbox"/> Can be Sold <input type="checkbox"/> Can be Purchased	<input type="checkbox"/> Active	<input type="checkbox"/> Traceability	<input type="checkbox"/> Bill of Materials	
		<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Sales		
<input type="button" value="General Information"/> <input type="button" value="Inventory"/> <input type="button" value="Sales"/> <input type="button" value="Invoicing"/> <input type="button" value="Notes"/>		Product Type: Consumable Internal Reference: <input type="text"/> Barcode: <input type="text"/> Internal Category: All			
		Sale Price: <input type="text" value="0.00"/> Cost: <input type="text" value="0.00"/>	Unit of Measure: Unit(s) <input type="button" value="Unit(s)"/>	Purchase Unit of Measure: Unit(s) <input type="button" value="Unit(s)"/>	Control Purchase Bills: <input type="radio"/> On ordered quantities <input type="radio"/> On received quantities

User will be asked to enter or choose the following fields:

- Upload Product **Image** by clicking the camera icon. The uploaded image should display the preview after the successful upload.
- Enter **Product Name**.

- Choose option value whether the item is **Can be Sold** or **Can be Purchased**.
- **General Information** tab. This is the default tab on create product page (some of the fields are optional).
- Choose **Product Type**.
- Choose **Internal Preference**.
- Enter **Barcode**.
- Choose **Internal Category**.
- Enter **Cost** value. Value cost of the product created.
- Choose **Unit of Measure** for the product.
- Choose **Purchase Unit of Measure** value.
- Choose **Control Purchase**.
- Choose **Bill** option.

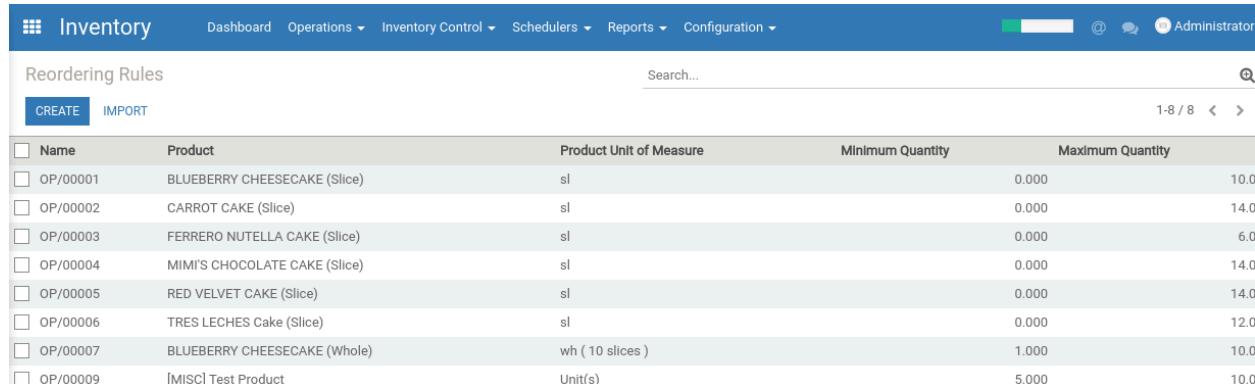
- **Inventory** tab. The page will display the inventory details of the added products.
- **Sales** tab. The page will display the sales details of the added products.
- **Notes** tab. The page will display the notes pertaining to the created products.

Click the **Save** button to save the created new products and click the **Discard** otherwise.

5.2.4 Reordering Rules

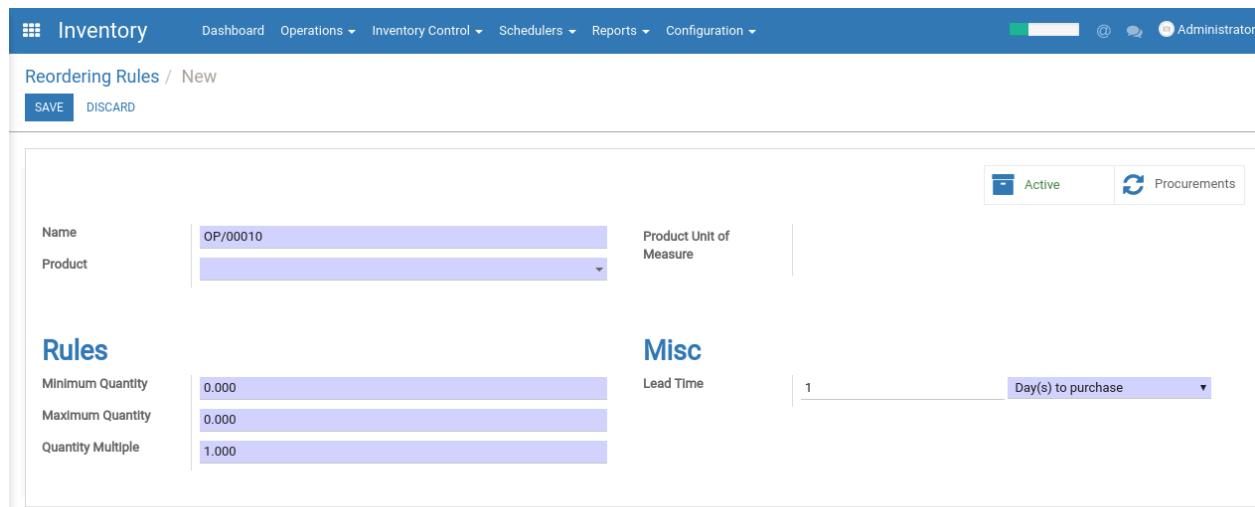
Click the Reordering Rules submenu option under the Inventory Control menu. Page will load to the Reordering Rules table. The table will list the rules for every product.

Reordering rules functionality is when the product quantity reaches the minimum quantity value, it will automatically create a purchase order and send an email to the admin that the product stock is low.



<input type="checkbox"/> Name	Product	Product Unit of Measure	Minimum Quantity	Maximum Quantity
<input type="checkbox"/> OP/00001	BLUEBERRY CHEESECAKE (Slice)	sl	0.000	10.0
<input type="checkbox"/> OP/00002	CARROT CAKE (Slice)	sl	0.000	14.0
<input type="checkbox"/> OP/00003	FERRERO NUTELLA CAKE (Slice)	sl	0.000	6.0
<input type="checkbox"/> OP/00004	MIMI'S CHOCOLATE CAKE (Slice)	sl	0.000	14.0
<input type="checkbox"/> OP/00005	RED VELVET CAKE (Slice)	sl	0.000	14.0
<input type="checkbox"/> OP/00006	TRES LECHES Cake (Slice)	sl	0.000	12.0
<input type="checkbox"/> OP/00007	BLUEBERRY CHEESECAKE (Whole)	wh (10 slices)	1.000	10.0
<input type="checkbox"/> OP/00009	IMISC! Test Product	Unit(s)	5.000	10.0

Click the **Reordering Rules Details** it will display the product details where the minimum and maximum quantity are set by the admin or manager to indicate that the stock limit.



SAVE
DISCARD

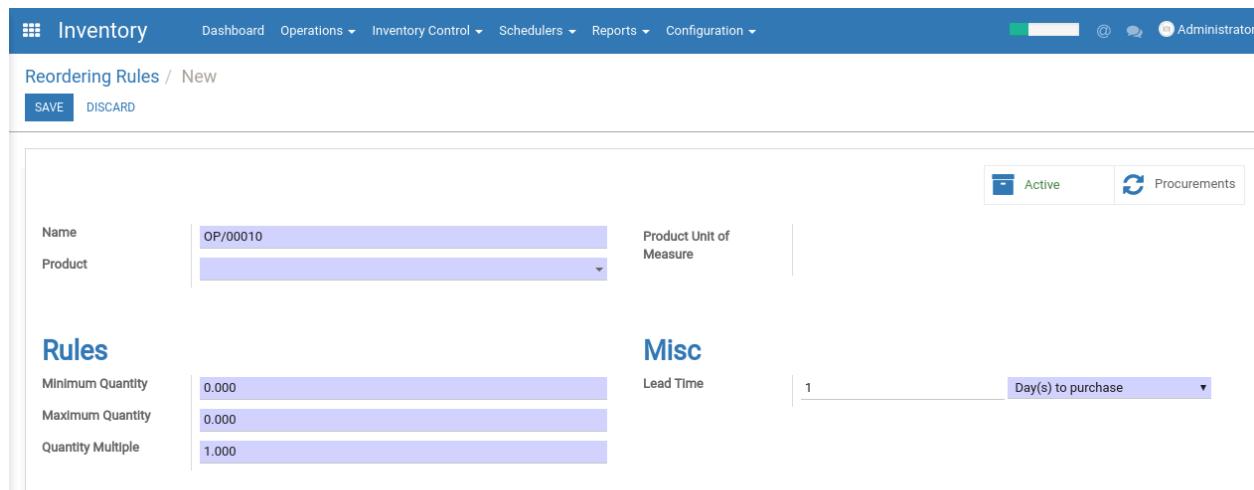
Active
Procurements

Name	OP/00010	Product Unit of Measure
Product		
Rules		Misc
Minimum Quantity	0.000	Lead Time
Maximum Quantity	0.000	1
Quantity Multiple	1.000	Day(s) to purchase

Click the **Edit** button. Admin can update the Rules on the Reordering Rules screen for each product or item.

5.2.4.1 Create Reordering Rules

Click the Create button under the Reordering Rules. Create page will load and it should look like the screen below.



Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration @ Administrator

Reordering Rules / New

SAVE DISCARD

Name: OP/00010 Product Unit of Measure: (dropdown)

Product: (dropdown)

Rules

- Minimum Quantity: 0.000
- Maximum Quantity: 0.000
- Quantity Multiple: 1.000

Misc

- Lead Time: 1
- Days to purchase: (dropdown)

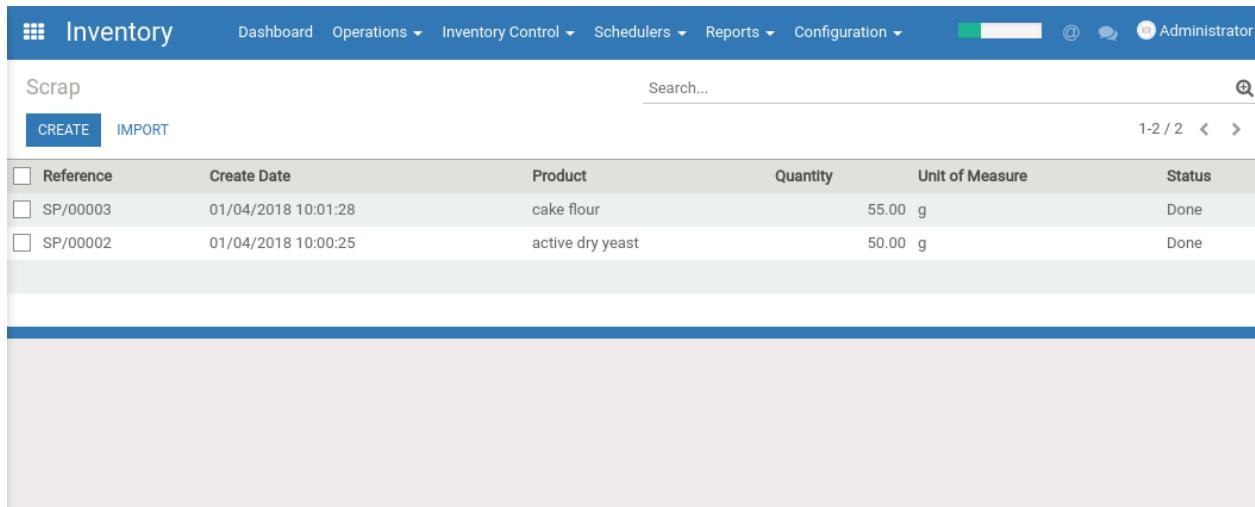
User will be asked to enter or choose the following fields.

- Enter **Name**.
- Select **Product** option.
- Enter **Minimum Quantity** value.
- Enter **Maximum Quantity** value.
- Enter **Quantity Multiple** value.

Click the **Save** button to save the created Reordering Rules and click the **Discard** otherwise.

5.2.5 Scrap

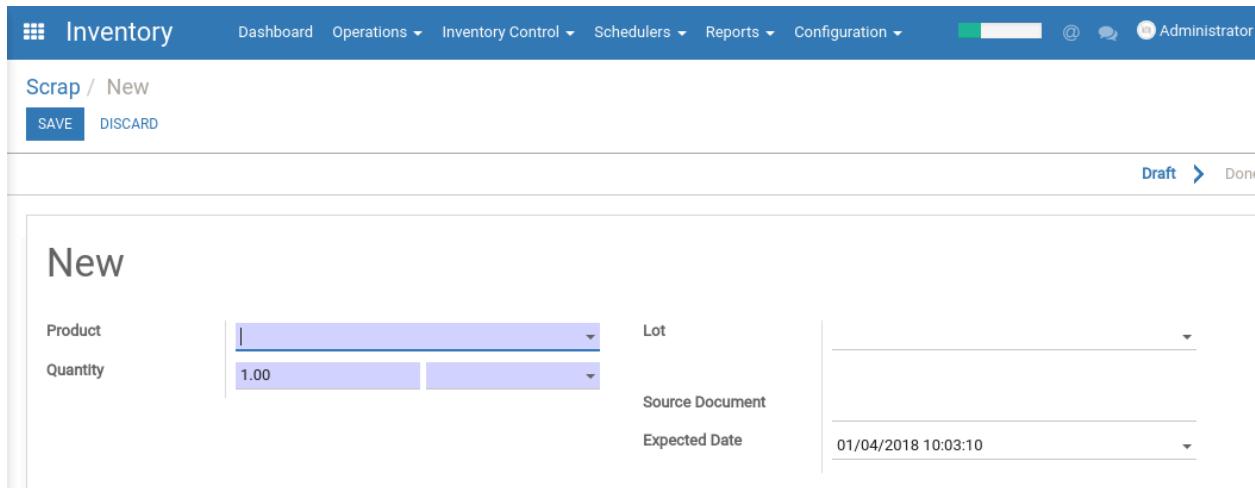
Click the **Scrap** submenu option under the Inventory Control menu. Scrap page table list will display all the company loses.



<input type="checkbox"/> Reference	Create Date	Product	Quantity	Unit of Measure	Status
SP/00003	01/04/2018 10:01:28	cake flour	55.00	g	Done
SP/00002	01/04/2018 10:00:25	active dry yeast	50.00	g	Done

5.2.5.1 Create Scrap Transaction

Click the **Create** button under the Scrap label. Create Scrap page should look like the screen below.



Product	<input type="text"/>	Lot	<input type="text"/>
Quantity	1.00	Source Document	<input type="text"/>
		Expected Date	01/04/2018 10:03:10

User will be asked to enter or choose on the following page (some of the fields are optional):

- Choose **Product**.
- Enter **Quantity**.
- Choose **Unit of Measure**.
- Enter **Source Document**.
- Choose **Expected Date**.

Click the **Save** button to save the newly created scrap transaction and click the **Discard** button otherwise.

5.2.3 Stock Moves

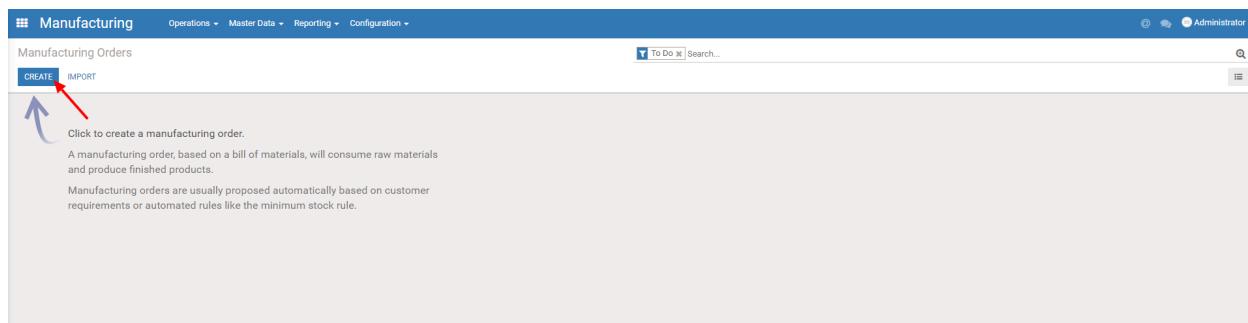
Click the **Stock Moves** submenu option under the Reports menu. Page will display the stock move of each products in the system in table list form.

Stock Moves								
<input type="checkbox"/> Ready or To Do <input type="text"/> Search... @   								
	Description	Reference	Source Document	Product	Quantity	Unit of Measure	Expected Date	Status
<input type="checkbox"/>	MO/00295	MO/00295		CARROT CAKE (Slice)	14.000	sl	12/28/2017 08:00:00	Available
<input type="checkbox"/>	MO/00295	MO/00295		CARROT CAKE (Whole)	1.000	wh (14 Slices)	12/28/2017 08:00:00	Waiting Availability
<input type="checkbox"/>	MO/00296	MO/00296		MIMI'S CHOCOLATE CAKE (Slice)	14.000	sl	12/28/2017 08:00:00	Available
<input type="checkbox"/>	MO/00296	MO/00296		MIMI'S CHOCOLATE CAKE (Whole)	1.000	wh (14 Slices)	12/28/2017 08:00:00	Waiting Availability
<input type="checkbox"/>	MO/00297	MO/00297		TRES LECHES Cake (Slice)	12.000	sl	12/28/2017 08:00:00	Available
<input type="checkbox"/>	MO/00297	MO/00297		TRES LECHES CAKE (Whole)	1.000	wh (12 Slices)	12/28/2017 08:00:00	Waiting Availability

6.0 Baking

In the main menu , click **Baking**. User should be navigated to the Manufacturing Order submenu page.

Manufacturing Order submenu page is the default page after clicking the Manufacturing menu. It's also display all the manufacturing orders list on the table.

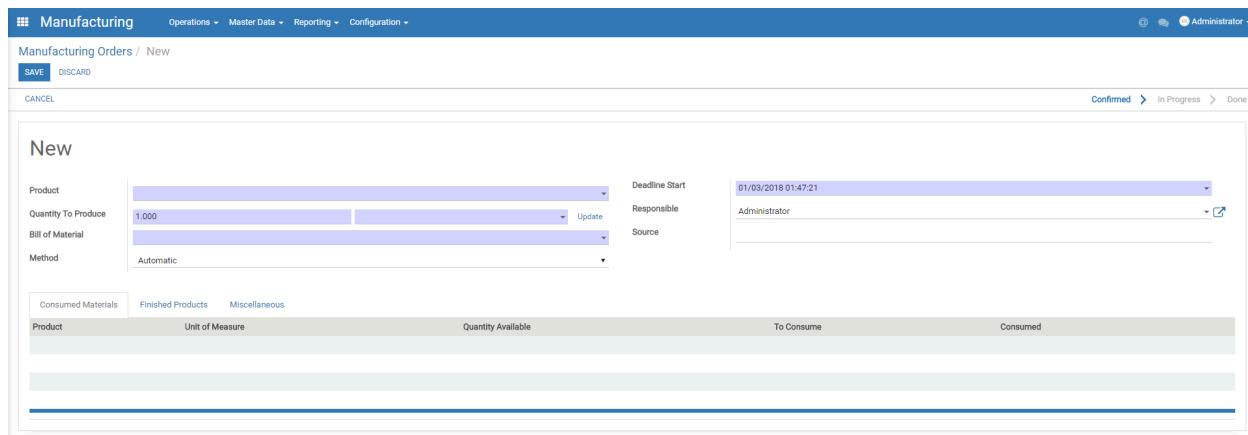


The screenshot shows the Odoo Manufacturing Orders page. At the top, there are tabs for 'Manufacturing', 'Operations', 'Master Data', 'Reporting', and 'Configuration'. On the right, there are user icons and a search bar. Below the tabs, there are two buttons: 'CREATE' (highlighted with a red arrow) and 'IMPORT'. A large text area contains instructions: 'Click to create a manufacturing order. A manufacturing order, based on a bill of materials, will consume raw materials and produce finished products. Manufacturing orders are usually proposed automatically based on customer requirements or automated rules like the minimum stock rule.'

Note: Clear the default filter on the **Search** field to view all the Manufacturing Orders list on the table list. Search field is located at the upper right corner of the Manufacturing Orders page.

6.1 Create Manufacturing Order

Click the **Create** button under Manufacturing Orders label. Page should display the create manufacturing order page and it should looks like the screen below.



The screenshot shows the 'New' manufacturing order creation page. At the top, there are buttons for 'SAVE' and 'DISCARD'. Below that, there is a 'CANCEL' button and a status indicator 'Confirmed > In Progress > Done'. The main form has sections for 'Product' (Quantity To Produce: 1.000), 'Bill of Material' (Automatic), 'Deadline Start' (01/03/2018 01:47:21), 'Responsible' (Administrator), and 'Source'. At the bottom, there are tabs for 'Consumed Materials', 'Finished Products', and 'Miscellaneous'. There are also columns for 'Product', 'Unit of Measure', 'Quantity Available', 'To Consume', and 'Consumed'.

User will be asked to enter and choose the following fields.

- Choose **Product**.
- Choose **Quantity To Produce**.
- Choose **Bill of Material**.
- Choose **Deadline Start**.
- Choose **Responsible** person.
- Choose **Source** value.

- **Consumed Materials** Tab. Is the default tab for the product creation on the Manufacturing Order page. It will display the raw materials for the product production.
- **Finished Product** tab. Tab will display the finished product after manufacturing.
- **Miscellaneous** tab. Tab will display the availability of the raw materials for manufacturing on the finished product.

Click the **Save** button to save the Manufacturing Order and click the **Discard** option otherwise.

6.1.1 Manufacturing Order Steps

After saving the Manufacturing Order, user will be asked to check the availability of the product's raw material. The Manufacturing Order page should look like the screen below.

Step 1

Click the **Check availability** button. This button will check for the product raw material availability.

Both the message “**Raw materials not available!**” and the check availability button should disappear if all materials are available and items are ready for production.

Steps 2

Manufacturing

Manufacturing Orders / MO/00306

EDIT CREATE Print Action 1 / 1 < >

CHECK AVAILABILITY PRODUCE CANCEL SCRAP **New materials not available!** Confirmed > In Progress > Done

MO/00306

Product	BERRY SWIRL CHEESECAKE	Deadline Start	01/03/2018 03:10:54	
Quantity To Produce	1.000 wh (12 Slices) Update	Responsible	Administrator	
Bill of Material	BERRY SWIRL CHEESECAKE	Source		
Method	Automatic			
Consumed Materials	Finished Products	Miscellaneous		
Product	Unit of Measure	Quantity Available	To Consume	Consumed
buttermilk	g	0.000	70.000	0.000
egg whites	g	0.000	1.000	0.000
eggs	g	0.000	1.000	0.000
granulated sugar	g	0.000	67.000	0.000
vanilla	g	0.000	5.000	0.000
berries	g	0.000	200.000	0.000
water	g	0.000	79.000	0.000
cornstarch	g	0.000	9.000	0.000
sugar	g	0.000	10.000	0.000
crushed oreo	g	0.000	200.000	0.000
LEMON JUICE	g	0.000	12.000	0.000
cream cheese	g	0.000	325.000	0.000
heavy cream	g	0.000	60.000	0.000

Click the **Produce** button to start the production process of the product. Produce modal should be displayed.

Manufacturing

Manufacturing Orders / MO/00308

EDIT CREATE Print Action 1 / 1 < >

CHECK AVAILABILITY PRODUCE CANCEL SCRAP **New materials not available!** Confirmed > In Progress > Done

MO/00308

Product	BERRY SWIRL CHEESECAKE	Deadline Start	01/03/2018 03:10:54	
Quantity To Produce	1.000 wh (12 Slices) Update	Responsible	Administrator	
Bill of Material	BERRY SWIRL CHEESECAKE	Source		
Method	Automatic			
Consumed Materials	Finished Products	Miscellaneous		
Product	Unit of Measure	Quantity Available	To Consume	Consumed
buttermilk	g	0.000	70.000	0.000
egg whites	g	0.000	1.000	0.000
eggs	g	0.000	1.000	0.000
granulated sugar	g	0.000	67.000	0.000
vanilla	g	0.000	5.000	0.000
berries	g	0.000	200.000	0.000
water	g	0.000	79.000	0.000
cornstarch	g	0.000	9.000	0.000
sugar	g	0.000	10.000	0.000
crushed oreo	g	0.000	200.000	0.000

Produce

Product: BERRY SWIRL CHEESECAKE

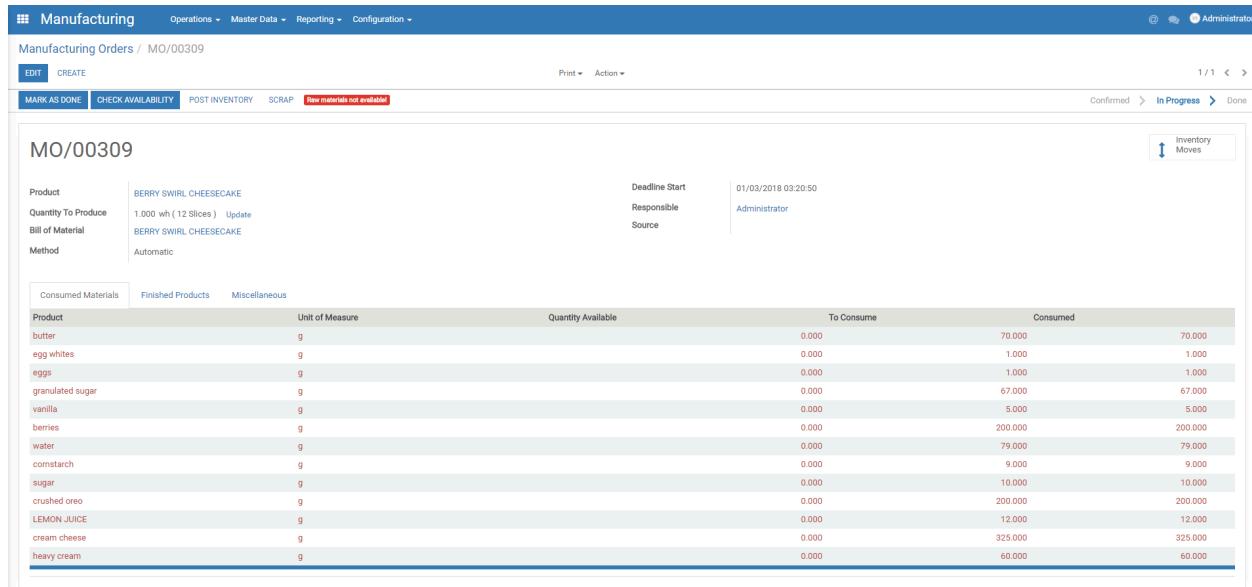
Quantity: wh (12 Slices)

RECORD PRODUCTION CANCEL

Click the **Record Production** button to record that the product are already in production and click the **Cancel** button if production should be stopped or on hold.

Steps 3

After tapping the **Record Production** button, the user needs to mark the product as done. Users will be asked to click the **Mark as Done** button to finish the Manufacturing Order procedures.



The screenshot shows the Odoo Manufacturing Orders interface. The top navigation bar includes 'Manufacturing', 'Operations', 'Master Data', 'Reporting', and 'Configuration'. The sub-menu 'Manufacturing Orders' shows 'MO/00309'. The main content area displays the manufacturing order details for 'BERRY SWIRL CHEESECAKE' with a quantity of '1.000 wh (12 Slices)'. The 'Deadline Start' is '01/03/2018 03:20:50' and the 'Responsible' is 'Administrator'. The 'Consumed Materials' table lists various ingredients with their consumed quantities and remaining availability. Buttons at the top include 'MARK AS DONE', 'CHECK AVAILABILITY', 'POST INVENTORY', 'SCRAP', and 'New materials not available'. Status indicators at the top right show 'Confirmed', 'In Progress', and 'Done'.

Consumed Materials	Unit of Measure	Quantity Available	To Consume	Consumed
butter	g	0.000	70.000	70.000
egg whites	g	0.000	1.000	1.000
eggs	g	0.000	1.000	1.000
granulated sugar	g	0.000	67.000	67.000
vanilla	g	0.000	5.000	5.000
berries	g	0.000	200.000	200.000
water	g	0.000	79.000	79.000
cornstarch	g	0.000	9.000	9.000
sugar	g	0.000	10.000	10.000
crushed oreo	g	0.000	200.000	200.000
LEMON JUICE	g	0.000	12.000	12.000
cream cheese	g	0.000	325.000	325.000
heavy cream	g	0.000	60.000	60.000

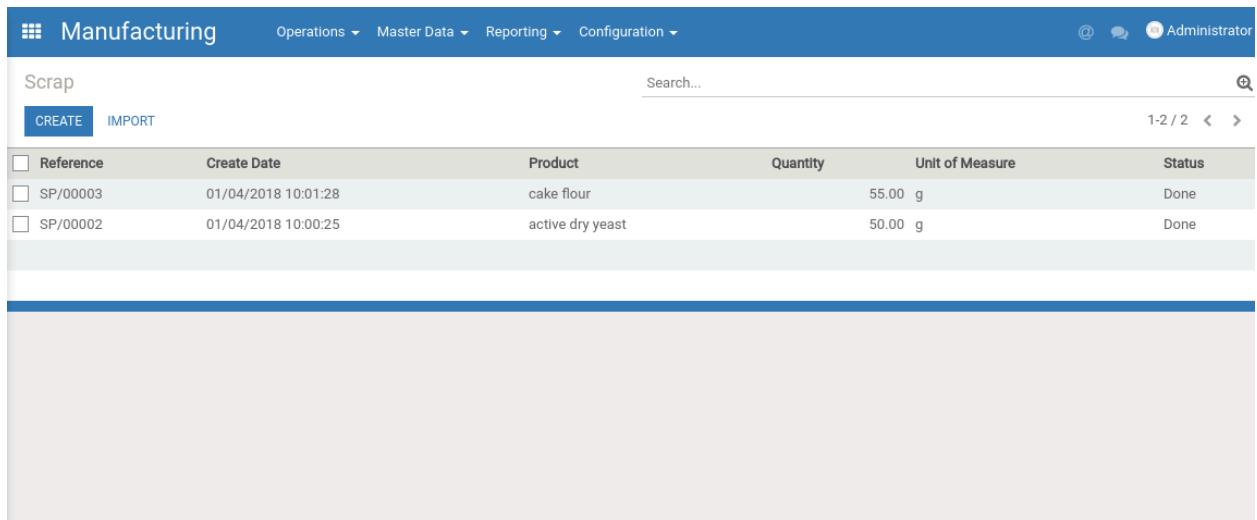
- Click the **Post Inventory** option to hold the product production.
- Click the **Scrap** button to scrap the created manufacturing order and order should be displayed at the **Scrap** submenu page on Manufacturing page.

Click the **Unreserve** button to force the availability of the product raw material to not available and manufacturing order will wait for the product raw material to be available again.

6.2 Scrap

- Click the Scrap submenu under the **Operations** menu.
- Click the **Scrap** on the Dropbox modal.

Users should be navigated to the Scrap page and display the table list. Products listed here are the products from production losses.



<input type="checkbox"/>	Reference	Create Date	Product	Quantity	Unit of Measure	Status
<input type="checkbox"/>	SP/00003	01/04/2018 10:01:28	cake flour	55.00	g	Done
<input type="checkbox"/>	SP/00002	01/04/2018 10:00:25	active dry yeast	50.00	g	Done

6.3 Products UOM

Click the Product UOM submenu option will display the following options: Attributes , Attributes Values and Unit of Measure.

6.3.1 Attributes

Click the **Attributes** submenu option. Attributes table list will be displayed.

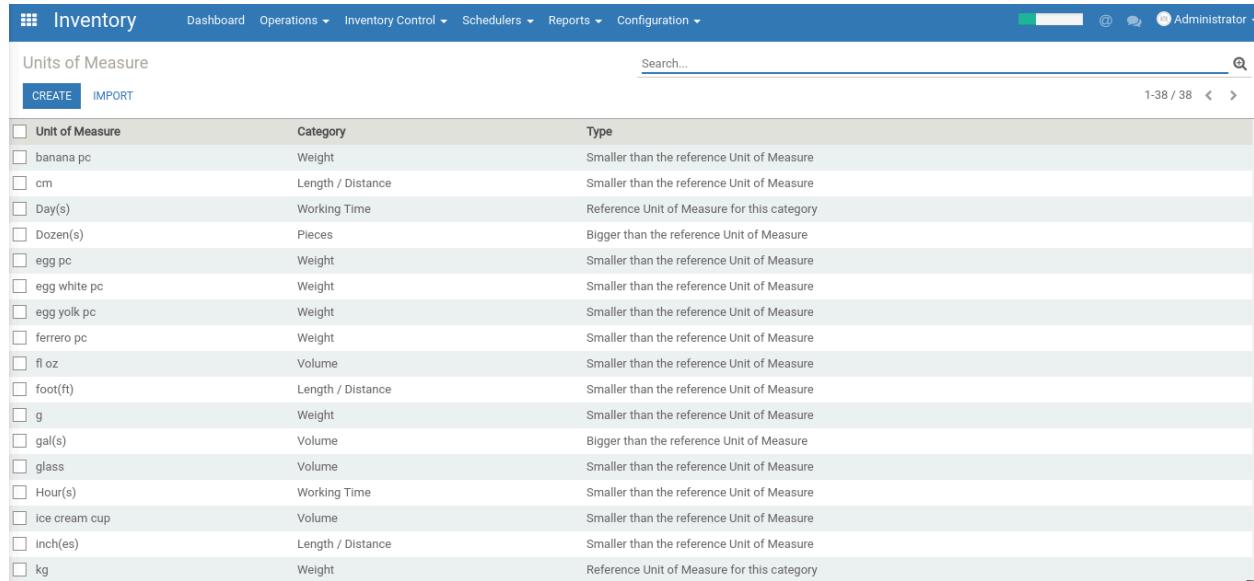
6.3.2 Attributes Values

Click the **Attributes Values** submenu option. Attributes value table list will be displayed.

6.3.3 Unit of Measure

Click the Unit of Measure option. User should be loaded on the unit measurement table list.

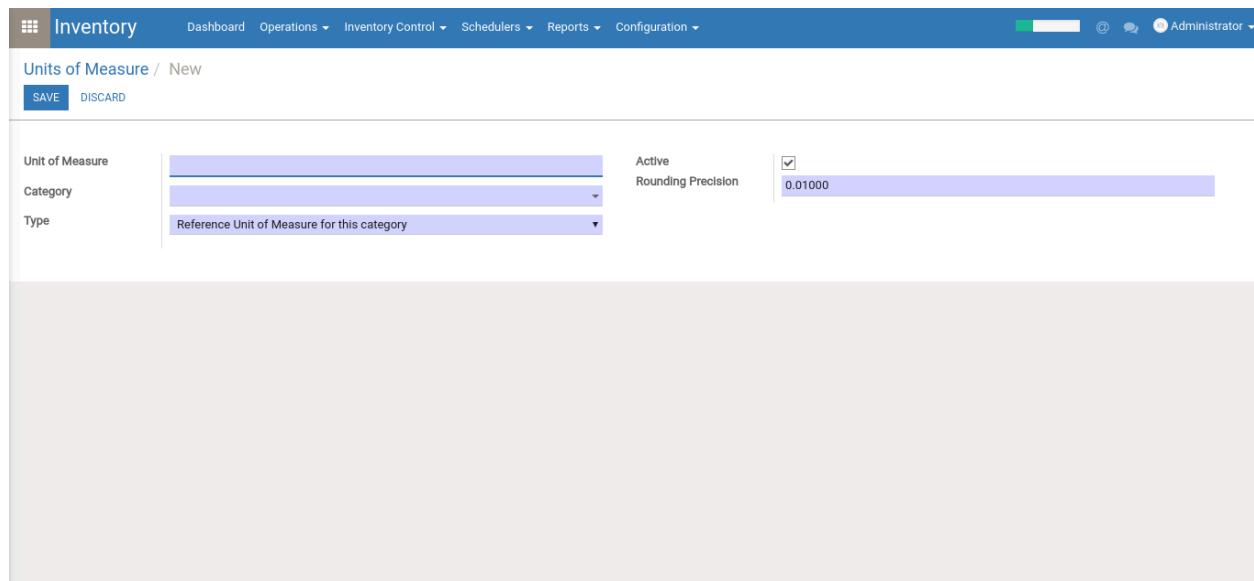
Page should look like the screen below.



Unit of Measure	Category	Type
banana pc	Weight	Smaller than the reference Unit of Measure
cm	Length / Distance	Smaller than the reference Unit of Measure
Day(s)	Working Time	Reference Unit of Measure for this category
Dozen(s)	Pieces	Bigger than the reference Unit of Measure
egg pc	Weight	Smaller than the reference Unit of Measure
egg white pc	Weight	Smaller than the reference Unit of Measure
egg yolk pc	Weight	Smaller than the reference Unit of Measure
ferrero pc	Weight	Smaller than the reference Unit of Measure
fl oz	Volume	Smaller than the reference Unit of Measure
foot(ft)	Length / Distance	Smaller than the reference Unit of Measure
g	Weight	Smaller than the reference Unit of Measure
gal(s)	Volume	Bigger than the reference Unit of Measure
glass	Volume	Smaller than the reference Unit of Measure
Hour(s)	Working Time	Smaller than the reference Unit of Measure
ice cream cup	Volume	Smaller than the reference Unit of Measure
inch(es)	Length / Distance	Smaller than the reference Unit of Measure
kg	Weight	Reference Unit of Measure for this category

6.3.3.1 Create Unit of Measure

Click the **Create** button under the Units of Measure label. Create Unit of Measure page will be displayed.



Unit of Measure	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Category	<input type="text"/>	Rounding Precision	0.0100
Type	<input type="text"/>	Reference Unit of Measure for this category	

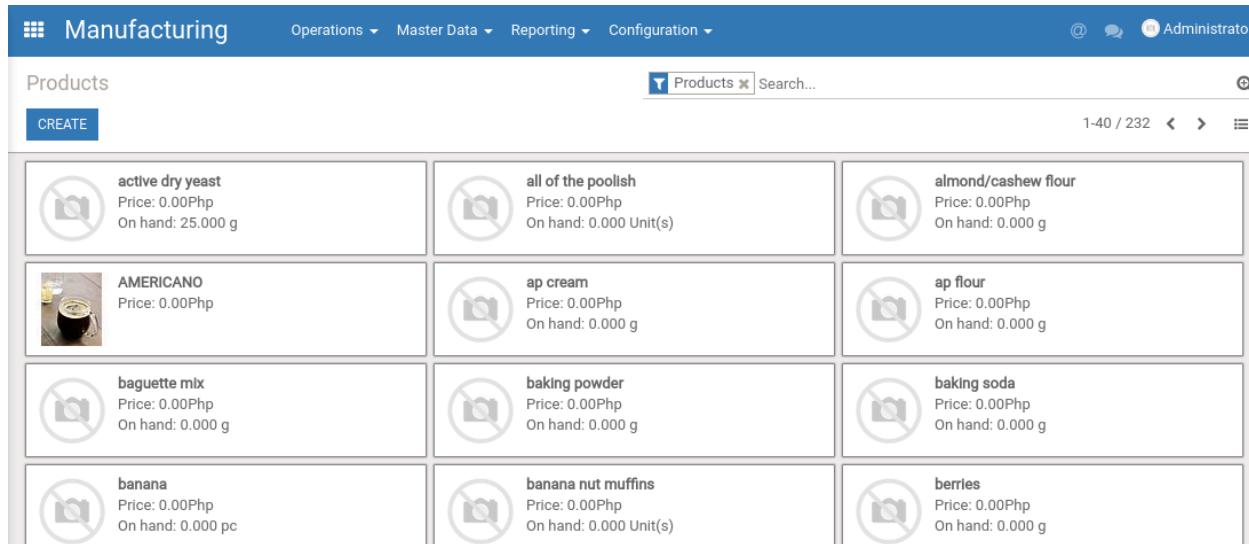
User will be asked to choose the following fields.

- Choose **Unit of Measure**.
- Choose **Category**.
- Choose **Type** option.
- Check the **Active** checkbox.
- Choose **Rounding Precision** value.

Click the **Save** button to save the newly created unit of measurement and click the **Discard** button otherwise.

6.4 Products

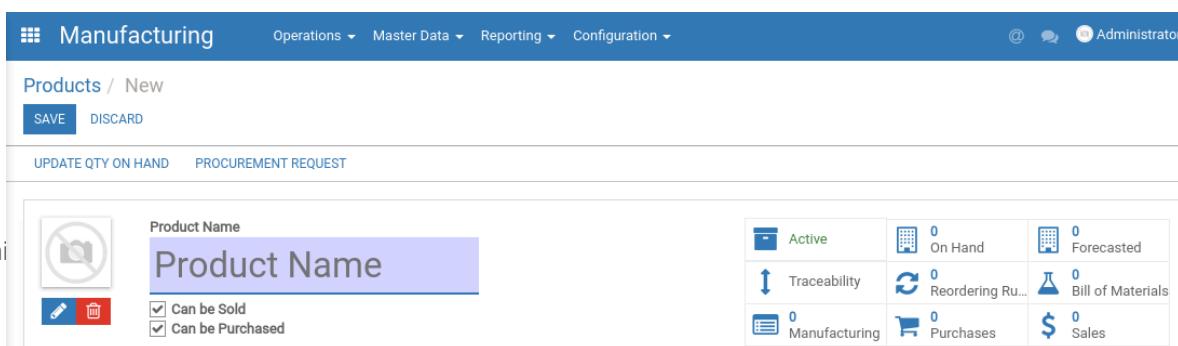
Click the **Products** submenu under the Master Data menu. Page will display the List of products that are available.



active dry yeast Price: 0.00Php On hand: 25.000 g	all of the poolish Price: 0.00Php On hand: 0.000 Unit(s)	almond/cashew flour Price: 0.00Php On hand: 0.000 g
AMERICANO Price: 0.00Php	ap cream Price: 0.00Php On hand: 0.000 g	ap flour Price: 0.00Php On hand: 0.000 g
baguette mix Price: 0.00Php On hand: 0.000 g	baking powder Price: 0.00Php On hand: 0.000 g	baking soda Price: 0.00Php On hand: 0.000 g
banana Price: 0.00Php On hand: 0.000 pc	banana nut muffins Price: 0.00Php On hand: 0.000 Unit(s)	berries Price: 0.00Php On hand: 0.000 g

6.4.1 Create Products

Click the Create button under the Products label. Page will display the following fields for creating new Product.



Product Name	Active	On Hand	Forecasted
Product Name	0	0	0
<input checked="" type="checkbox"/> Can be Sold	Traceability	Reordering Ru...	Bill of Materials
<input checked="" type="checkbox"/> Can be Purchased	Manufacturing	Purchases	Sales

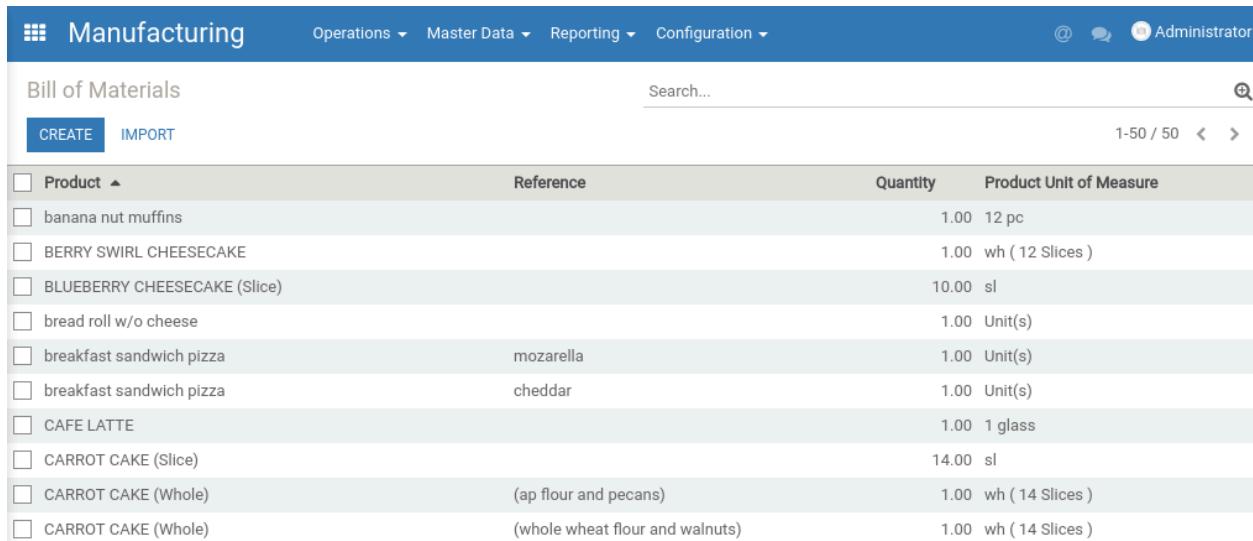
The user will be asked to enter or choose the following fields:

- Upload product image by clicking the camera icon. Uploaded image should display the preview after the successful upload.
- Enter **Product Name**.
- Choose option value whether the item is **Can be Sold** or **Can be Purchased**.
- **General Information** tab. This is the default tab on create product page (some of the fields are optional).
- Choose **Product Type**.
- Choose **Internal Preference**.
- Enter **Barcode**.
- Choose **Internal Category**.
- Enter **Cost** value. Value cost of the product created.
- Choose **Unit of Measure** for the product.
- Choose **Purchase Unit of Measure** value.
- Choose **Control Purchase**.
- Choose **Bill** option.
- **Inventory** tab. Page will display the inventory details of the added products.
- **Sales** tab. Page will display the sales details of the added products.
- **Variants** tab. Page will display the variants of the added product on the list.
- **Notes** tab. Page will display the notes pertaining to the created products.

Click the **Save** button to save the created new products and click the **Discard** otherwise.

6.5 Bill of Materials

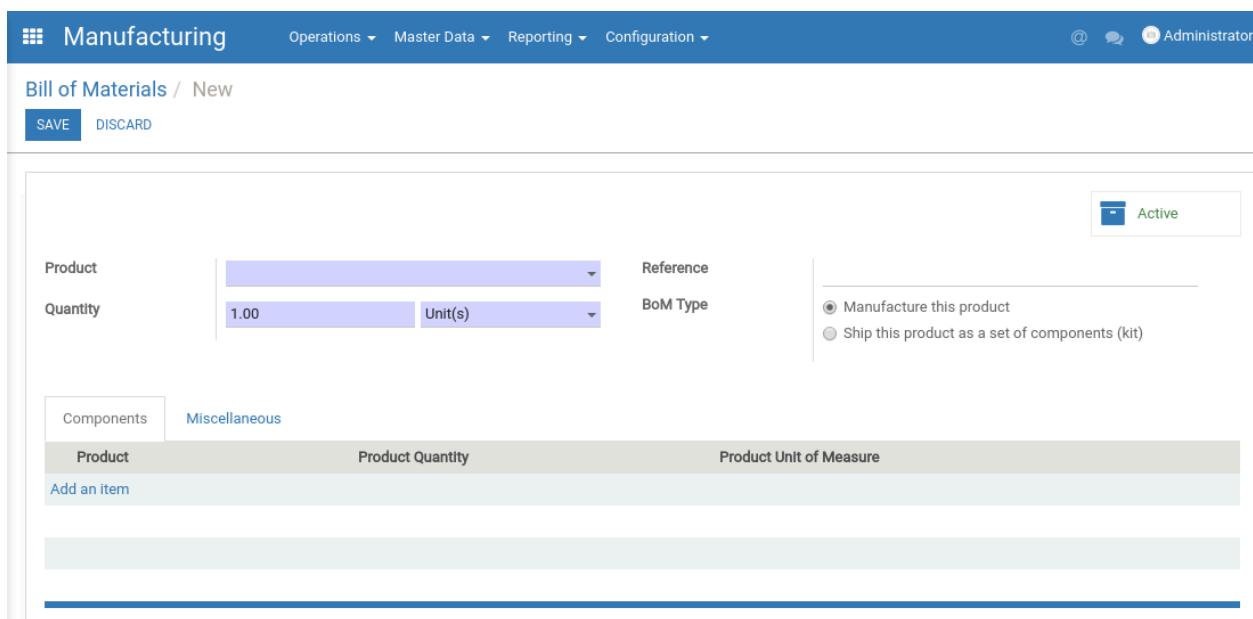
Click the **Bill of Materials** submenu under **Master Data** menu. User will be navigated to Bill of Materials page and Bill of Materials table list will be displayed.



Product	Reference	Quantity	Product Unit of Measure
banana nut muffins		1.00	12 pc
BERRY SWIRL CHEESECAKE		1.00	wh (12 Slices)
BLUEBERRY CHEESECAKE (Slice)		10.00	sl
bread roll w/o cheese		1.00	Unit(s)
breakfast sandwich pizza	mozzarella	1.00	Unit(s)
breakfast sandwich pizza	cheddar	1.00	Unit(s)
CAFE LATTE		1.00	1 glass
CARROT CAKE (Slice)		14.00	sl
CARROT CAKE (Whole)	(ap flour and pecans)	1.00	wh (14 Slices)
CARROT CAKE (Whole)	(whole wheat flour and walnuts)	1.00	wh (14 Slices)

6.5.1 Create Bill of Material

Click the **Create** button under the Bill of Materials label. Page will load the bill of material creation page.



Bill of Materials / New

Product:

Quantity: 1.00 Unit(s)

Reference:

BoM Type: Manufacture this product Ship this product as a set of components (kit)

Components: Active

Product	Product Quantity	Product Unit of Measure
Add an item		

The user will be asked to enter or choose the following fields.

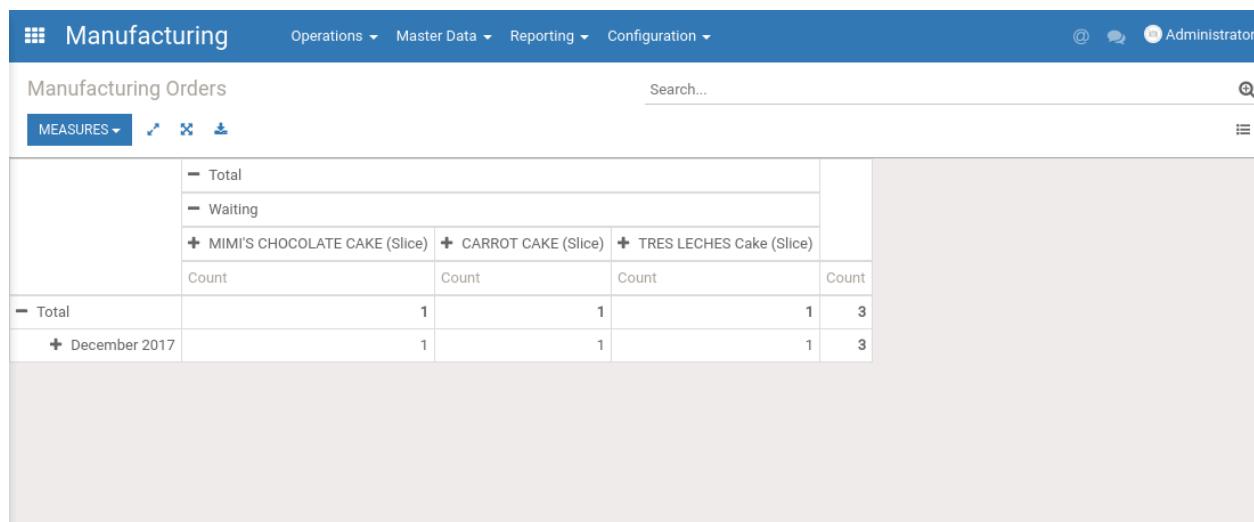
- Choose **Product**.
- Choose **Product Variant**.
- Enter Product **Quantity**.
- Choose **Quantity Measurement**.
- Enter **Reference**.
- Choose **BOM Type**.

- **Components** tab. Click the **Add new** option to add product components.
- **Miscellaneous** tab. Will display the miscellaneous product bill of material.
- **ByProducts** tab. Click the **Add new** option to add byproducts items.

Click the **Save** button to save the changes and click the **Discard** button otherwise.

6.6 Manufacturing Orders

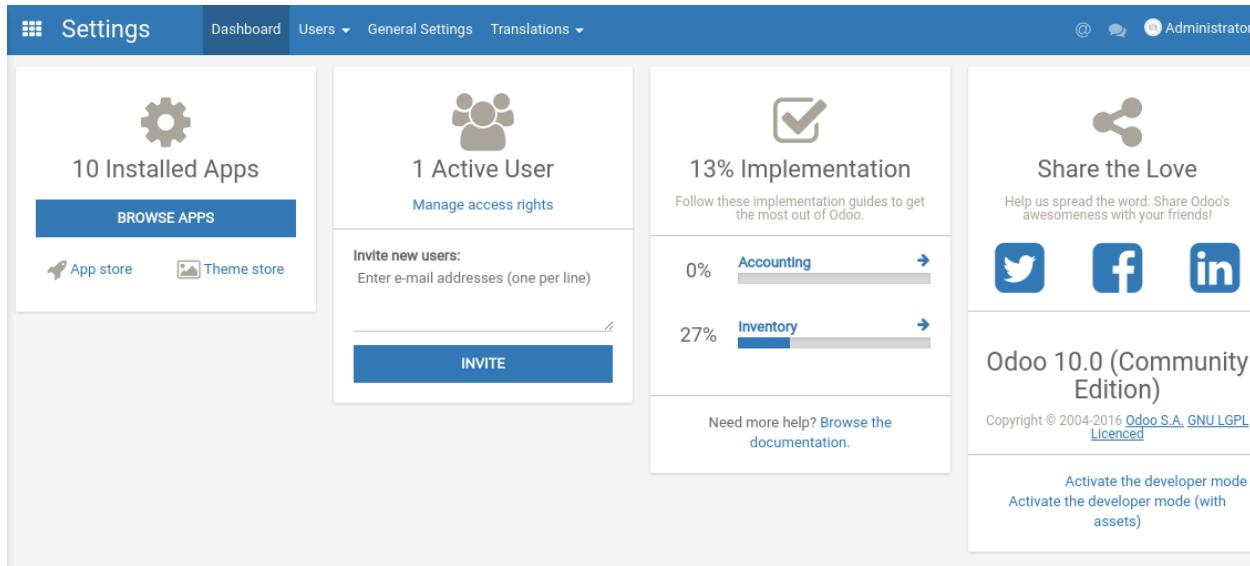
Click the **Manufacturing Orders** submenu under the Reporting menu. Page will load the report data about the manufacturing orders.



	Count	Count	Count	Count
— Total	1	1	1	3
— Waiting				
+ MIMI'S CHOCOLATE CAKE (Slice)				
+ CARROT CAKE (Slice)				
+ TRES LECHE'S Cake (Slice)				
Count				
— December 2017	1	1	1	3

7.0 Settings

In the main menu , click **Settings**. User should be navigated to Dashboard page with a summary of the settings for the system.



10 Installed Apps

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App store Theme store

1 Active User

Manage access rights

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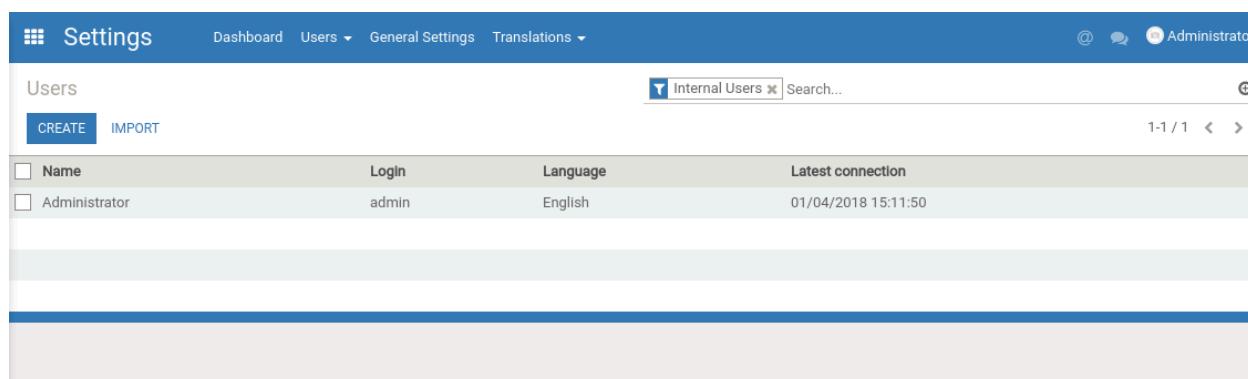
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Activate the developer mode
Activate the developer mode (with assets)

7.1 Create User Account

Click the **Users** submenu under the **Users** menu. It should display a list of users of the system.



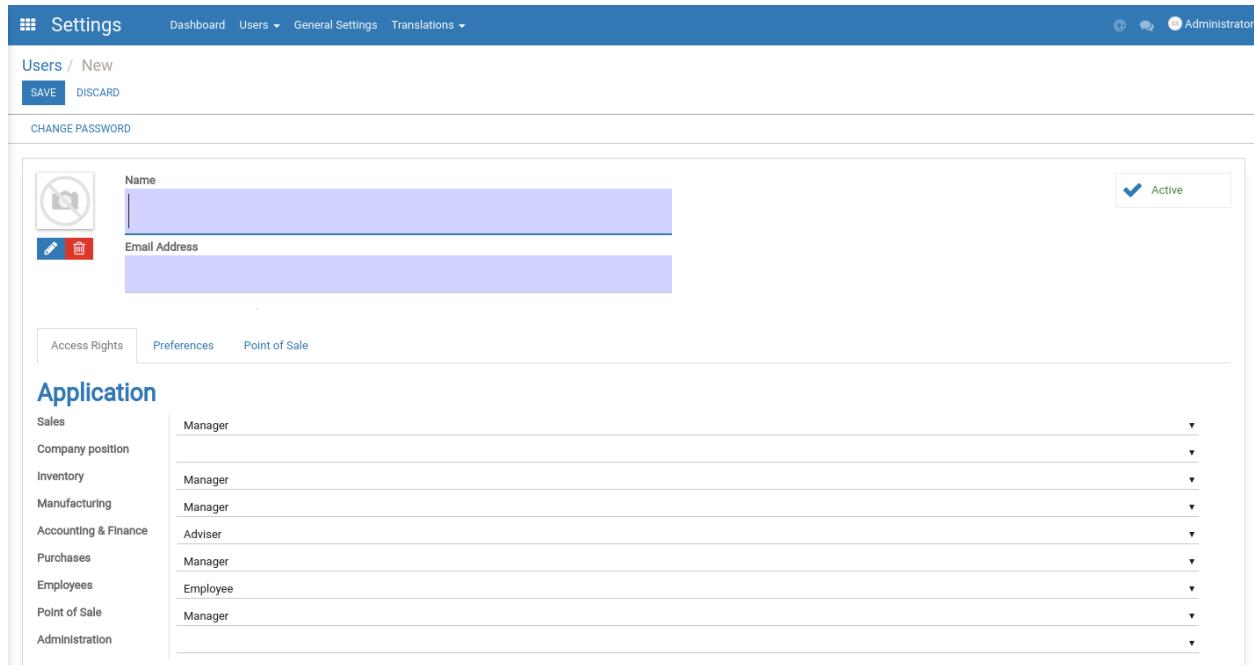
Users

Internal Users Search...

CREATE IMPORT

Name	Login	Language	Latest connection
Administrator	admin	English	01/04/2018 15:11:50

Click the **Create** button under the Users label. Create account page for the user should be displayed.



The screenshot shows the Odoo Settings - Users / New page. At the top, there are tabs for Settings, Dashboard, Users, General Settings, and Translations. The current page is 'Users / New'. Below the tabs, there are buttons for 'SAVE' and 'DISCARD'. A 'CHANGE PASSWORD' link is present. The main form includes fields for 'Name' (with a placeholder and a camera icon) and 'Email Address' (with a placeholder and edit/cancel icons). A 'Active' checkbox is checked. Below the form, there are tabs for 'Access Rights', 'Preferences', and 'Point of Sale'. The 'Application' section lists company positions with their respective access levels:

Company position	Access Rights
Sales	Manager
Company position	Manager
Inventory	Manager
Manufacturing	Manager
Accounting & Finance	Adviser
Purchases	Manager
Employees	Employee
Point of Sale	Manager
Administration	

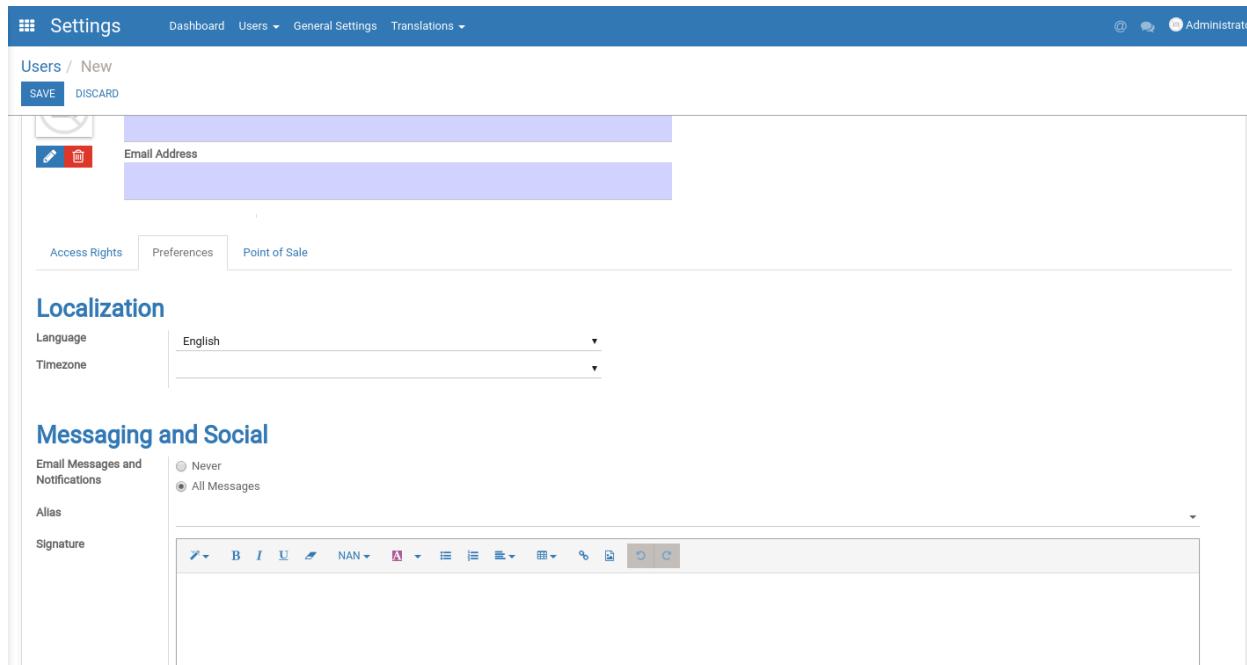
Note: Change password option is a requirement. Admin is required to add password for created account.

Access Right tab, Admin will be asked to enter or choose the following fields (all fields are required):

- Enter **Name**.
- Enter **Email Address**.
- Choose **Company Position**.
 - **Inventory Personnel** option. Inventory Personnel can only access the Purchases and Inventory menu. Personnel can request and create purchase orders and can view the inventory details of the company products. This user is restricted to see the Sales, Manufacturing and Settings menu.
 - **Manager** option. Managers are overseeing the whole process in the main store and it's supervising the store and purchases that are needed . The

only restriction for the manager's account is that this personnel cannot add users on the company which only the admin can do.

- **Admin** option. Admin can access all the Menu options. There is no restriction in an administrator's account because it's overseeing the whole process of the company or ventured business.



The screenshot shows the Odoo Settings interface for creating a new user. The top navigation bar includes 'Settings', 'Dashboard', 'Users', 'General Settings', and 'Translations'. The sub-menu 'Users / New' is selected. At the top right, there are icons for user profile, help, and administrator status. Below the navigation, there are 'SAVE' and 'DISCARD' buttons. The main form fields include:

- Localization:** Language (English) and Timezone (UTC).
- Messaging and Social:** Email Messages and Notifications (All Messages), Alias (empty), and Signature (empty).

Preferences tab, Admin will be asked to enter or choose on the following fields (fields are optional).

On Localization label choose the following option:

- Choose **Language**.
- Choose **Timezone**.

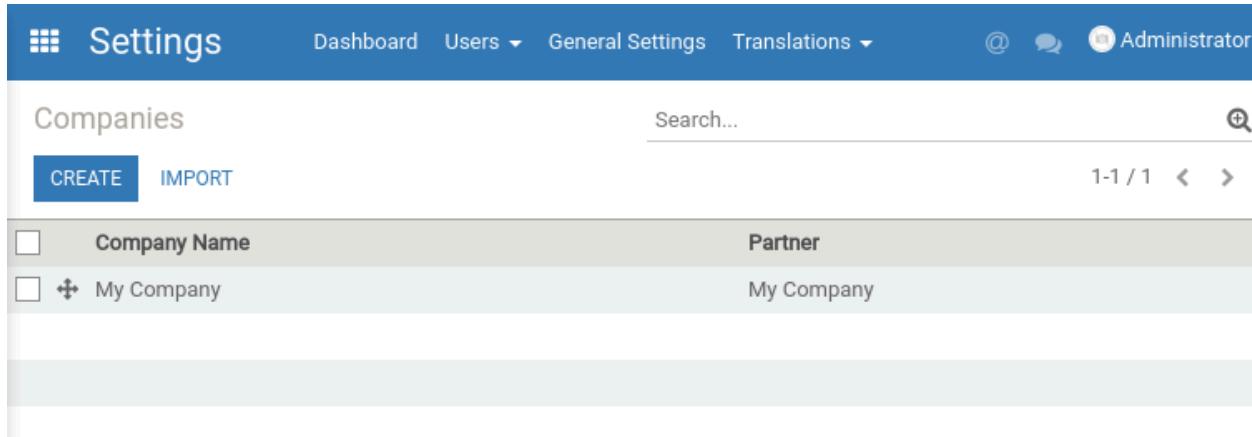
On Messaging and Social label enter or choose the following option:

- Choose **Email Messages and Notifications**.
- Choose **Alias**.
- Enter **Signature**.

Click the **Save** button to save the created new user and click the **Discard** otherwise.

7.2 Create Company

Click the **Companies** submenu under the Users menu. Page should be loaded to Company list page.



Company Name	Partner
My Company	My Company

Click the **Create** button under the Companies label. Create Company page should be displayed.

Admin will be asked to enter or choose the following fields.

- Enter **Company Name**.
- Enter **Company Tagline**.

In the **General Information** tab , Admin will be asked also to enter or choose the following fields (some of the fields are optional).

Address Label

- Enter **Street**.
- Enter **Street 2**.
- Enter **City**.
- Choose **State**.
- Enter **Zip**.

- Choose **Country**.
- Enter Phone Number.
- Enter **Fax** number.
- Enter **Email** address.
- Enter **Tax ID** number.
- Enter **Company Registry**.
- Choose **Currency** medium.
- Choose **Bank Account** option.
- Choose **Sales** option.
- Choose **Purchase** option.
- Choose **Account** option.
- Choose **Stock** option.

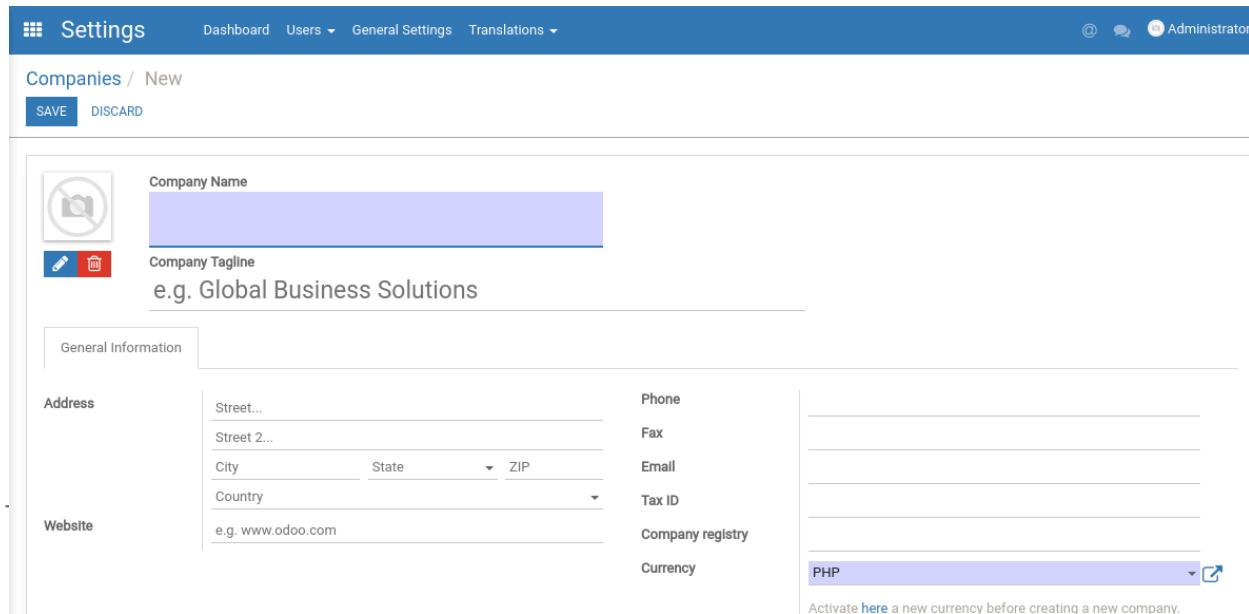
Website Label

- Enter Company Website.

Click the **Save** button to save the created new user and click the **Discard** otherwise.

7.3 Load Translation

Click the **Load Translation** submenu under Translations menu. Load a Translation modal will be displayed.



Companies / New

SAVE DISCARD

General Information

Address

Website

Phone

Fax

Email

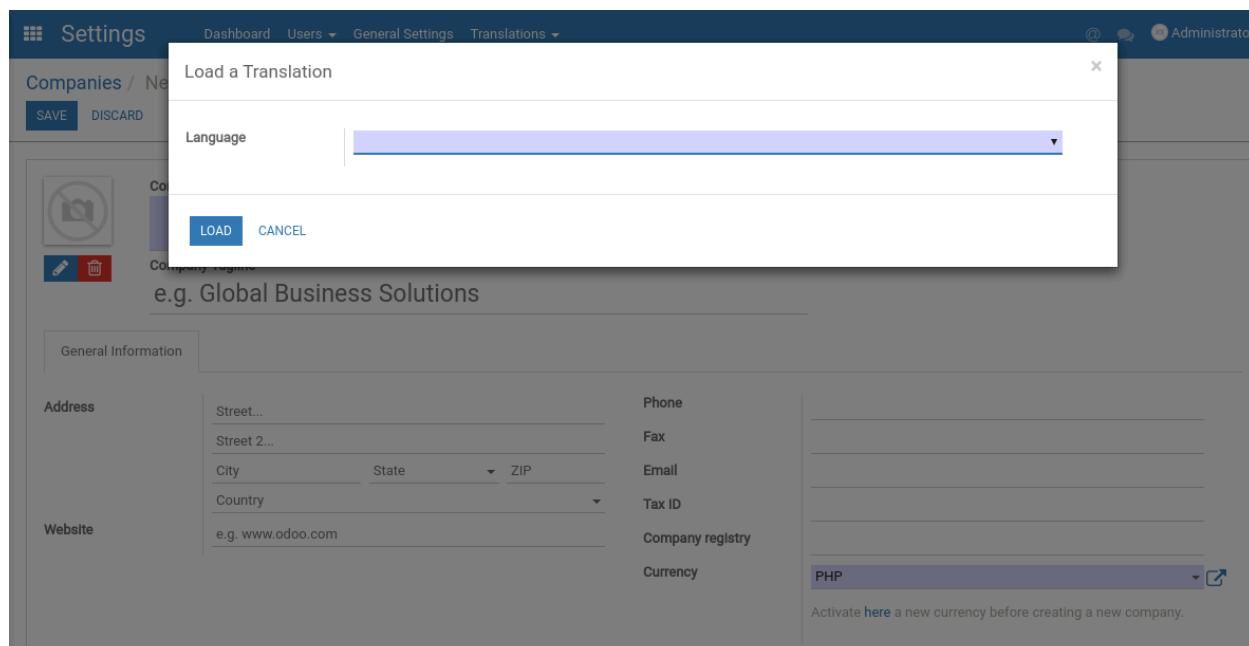
Tax ID

Company registry

Currency

PHP

Activate [here](#) a new currency before creating a new company.



The screenshot shows the Odoo Settings interface for 'Companies / Networks'. A modal dialog titled 'Load a Translation' is open, displaying a dropdown menu for 'Language'. Below the dropdown are 'LOAD' and 'CANCEL' buttons. The background of the main window shows fields for 'General Information', 'Address', 'Website', and 'Currency'. The 'Currency' field is currently set to 'PHP'.

Click the **Language** option. A language list option will be displayed the user may select from.

Click the **Load** button to save the changes and click **Cancel** button otherwise.

7.4 Scheduled Actions

Click Dashboard to be redirected to the Dashboard page. On the lower right click the **Activate the developer mode** link. This will enable the developer menus to appear.

Settings Dashboard Users General Settings Translations @ Administrator

 10 Installed Apps

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 1 Active User

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[!\[\]\(8efeeca32a58506bfaad768d743ac14b_img.jpg\)](#) [!\[\]\(6c5a398cc14d6d85b98524220052021b_img.jpg\)](#) [!\[\]\(7776f307e173c9c6b3a1a317f5a58cc1_img.jpg\)](#)

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Select the **Scheduled Actions** under the Technical menu. This opens the Scheduled Actions page with a list of scheduled actions.

Settings Dashboard Users General Settings Translations **Technical** @ Administrator (STB_01_04_2017_T)

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Action Bindings

- User-defined Defaults
- User Interface**
- Menu Items
- Views
- Customized Views
- User-defined Filters
- Tours
- Planners
- Database Structure**
- Models
- Fields
- Model Constraints
- ManyToMany Relations
- Attachments
- Logging
- Referenceable Models
- Decimal Accuracy
- Automation
- Scheduled Actions**
- Workflows**
- Workflows
- Activities
- Transitions
- Instances
- Workitems

Click the **Create** button.

Settings Dashboard Users General Settings Translations Technical @ Search... Administrator (STB_01_04_2017_TRISH)

Scheduled Actions All Search... 1-11 / 11 

CREATE IMPORT

<input type="checkbox"/>	Sequence	Name	Next Execution Date	Interval number	Interval Unit	Number of Calls	Active
<input type="checkbox"/>	1	Auto Change Qty	12/27/2017 09:24:33	5	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	1	Auto Produce Product	12/27/2017 09:20:37	3	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Auto-vacuum internal data	01/04/2018 18:43:29	1	Days	-1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Creating Email message to Admin for prod Alert Date Notif	01/04/2018 17:51:36	10	Minutes	-1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	5	Creating Email message to Admin for Stock PO	01/04/2018 17:51:10	10	Minutes	-1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	5	Email Queue Manager	01/04/2018 18:41:59	1	Hours	-1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	5	Fetchmail Service	12/06/2017 13:42:06	5	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Product Supply Check	12/27/2017 09:21:01	10	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Product Supply Check 2	12/27/2017 09:21:39	10	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	1	Run mrp scheduler	12/08/2017 10:53:07	3	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	1,000	Update Notification	01/10/2018 13:41:59	1	Weeks	-1	<input checked="" type="checkbox"/>

The Create a new Scheduled Action page should look like as displayed on the image below.

Settings Dashboard Users General Settings Translations Technical @ Search... Administrator (STB_01_04_2017_TRISH)

Scheduled Actions / New **SAVE** **DISCARD**

RUN MANUALLY

Name	<input type="text"/>	Active	<input checked="" type="checkbox"/>
User	<input type="text"/> Administrator	Priority	5
<input type="radio"/> Information <input type="radio"/> Technical Data			
Interval number	1	Interval Unit	Months
Next Execution Date	01/04/2018 17:57:07	Number of Calls	1
Repeat Missed	<input type="checkbox"/>		

7.4.1 Create Auto Change Quantity Action

RUN MANUALLY

Name	Auto Change Quantity	Active	<input checked="" type="checkbox"/>
User	Administrator	Priority	5
Information Technical Data			
Interval number	5	Interval Unit	Minutes
Next Execution Date	01/04/2018 17:57:07	Number of Calls	-1
Repeat Missed	<input type="checkbox"/>		

When in the Create Scheduled Actions page the user will be asked to enter and choose the following fields:

- Enter **Name** - name this field *Auto Change Quantity*.
- Choose **User** - by default, *Administrator* is selected.
- **Active** Option - select it to be Active.
- Enter **Interval Number** - input the number five (5) in this field.
- Choose **Next Execution Date** - by default, it the the current date.
- **Repeat Missed** Option - this is optional.
- Choose **Interval Unit** - select *Minutes*.
- Enter **Number of Calls** - input a negative one (-1).

Click **Save** button to save this action or **Discard** button if otherwise.

7.4.2 Create Auto Produce Order Action

RUN MANUALLY

Name	Auto Produce Order	Active	<input checked="" type="checkbox"/>
User	Administrator	Priority	5
Information Technical Data			
Interval number	3	Interval Unit	Minutes
Next Execution Date	01/04/2018 17:57:07	Number of Calls	-1
Repeat Missed	<input type="checkbox"/>		

When in the Create Scheduled Actions page the user will be asked to enter and choose the following fields:

- Enter **Name** - name this field *Auto Produce Order*.
- Choose **User** - by default, *Administrator* is selected.
- **Active** Option - select it to be Active.
- Enter **Interval Number** - input the number one (1) in this field.
- Choose **Next Execution Date** - by default, it the the current date.
- **Repeat Missed** Option - this is optional.
- Choose **Interval Unit** - select *Minutes*.
- Enter **Number of Calls** - input a negative one (-1).

Click **Save** button to save this action or **Discard** button if otherwise.

-- End of Document --