




Training Manual

1.0 Login Page

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

A circular logo with a blue and white patterned border. Inside the circle, the text 'Spanish Town' is written in a cursive font, with 'Bakery and Special Treats' in a smaller font below it.

Email

Password


[Log in](#)

[Manage Databases](#) | [Powered by Odoo](#)

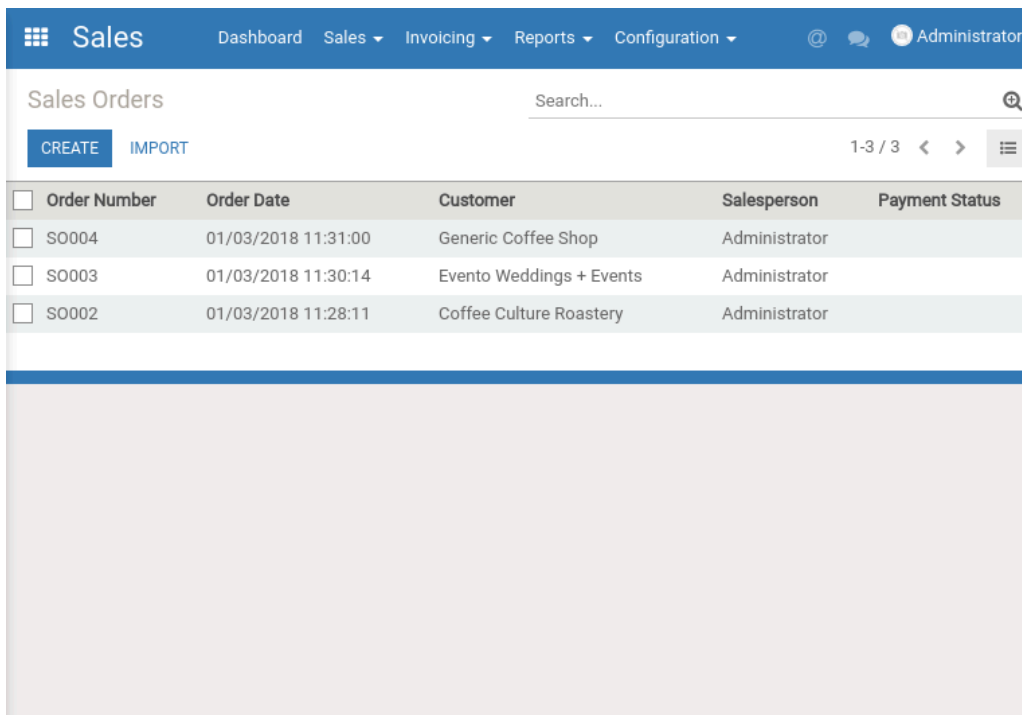
User must login by entering the **Email Address** and **Password**. After Entering the correct credentials, click the **Login** button to enter ODOO.

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.



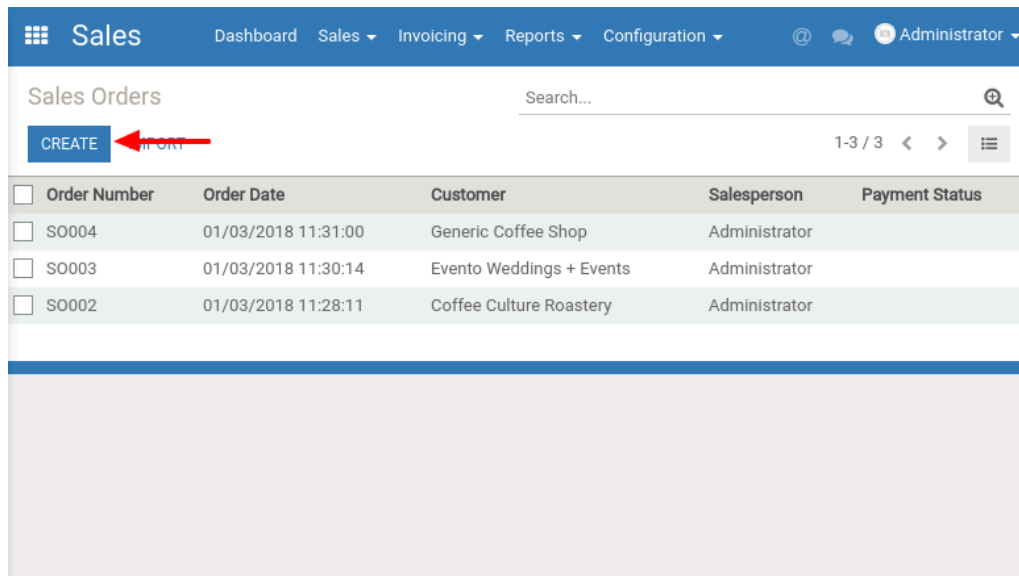
The screenshot shows the Odoo Sales Orders interface. At the top, there is a blue header bar with the 'Sales' menu and submenus: Dashboard, Sales, Invoicing, Reports, and Configuration. Below the header, the 'Sales Orders' section is visible, featuring a search bar and buttons for 'CREATE' and 'IMPORT'. A table lists three sales orders with columns for 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	

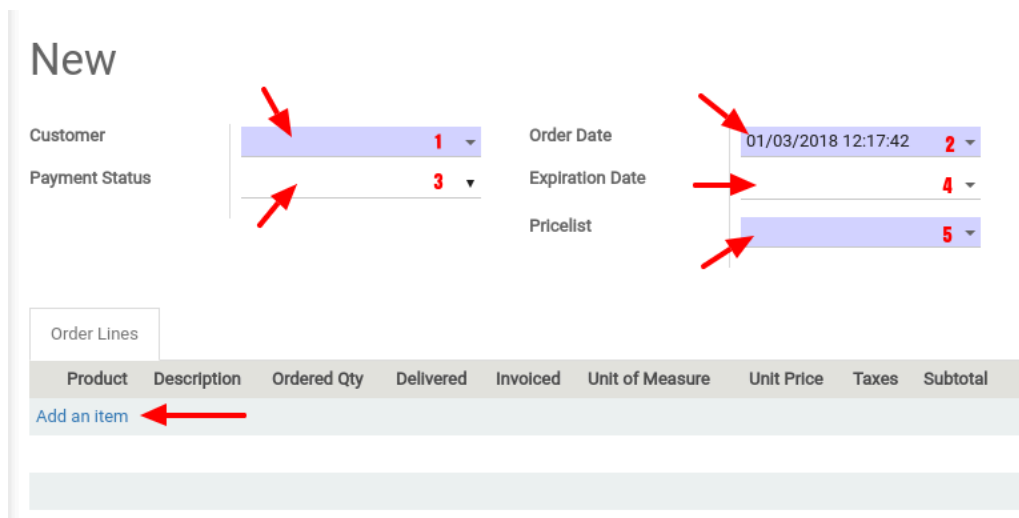
Create button will allow the user to make a new sales order and **Import** button will allow the user to transfer the data table of another user's.

2.1 Creating New Sales Orders

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



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



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.

S0005

Customer: Generic Coffee Shop
Sily 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
<input type="text"/>	<input type="text"/>	1.000	0.000	0.000	<input type="text"/>	0.00		0.00

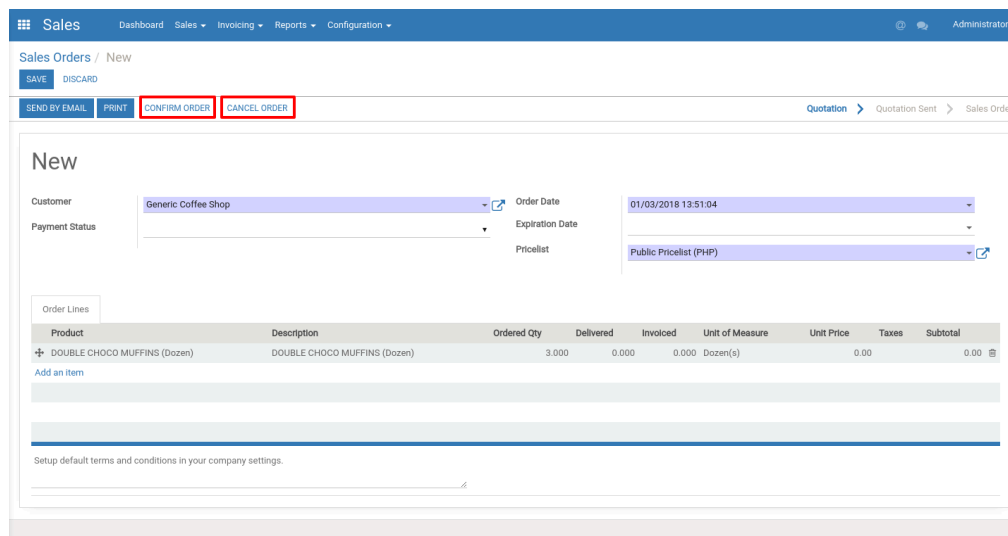
Add an item

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.

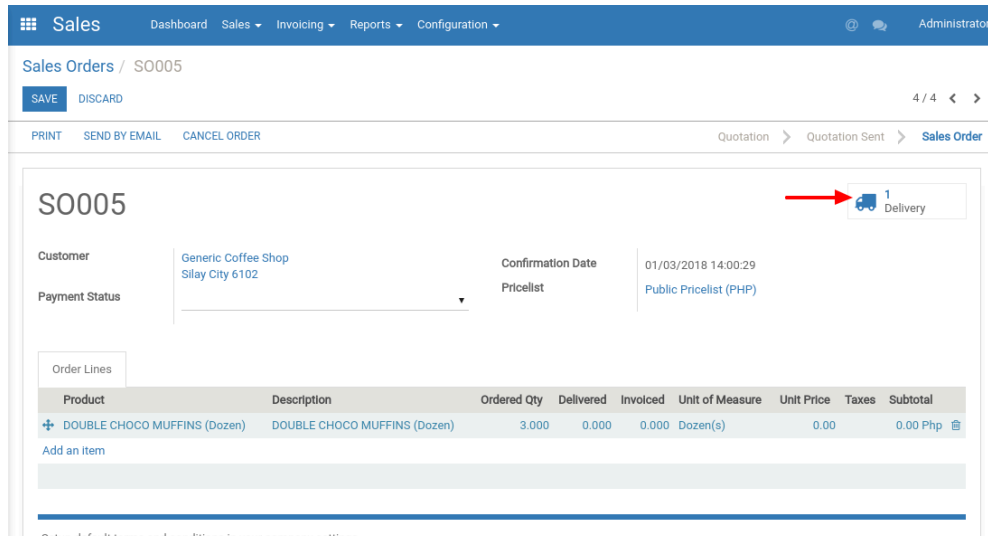
To Add another item, just click the Add an item option and repeat process on the Order Lines tab above.



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.

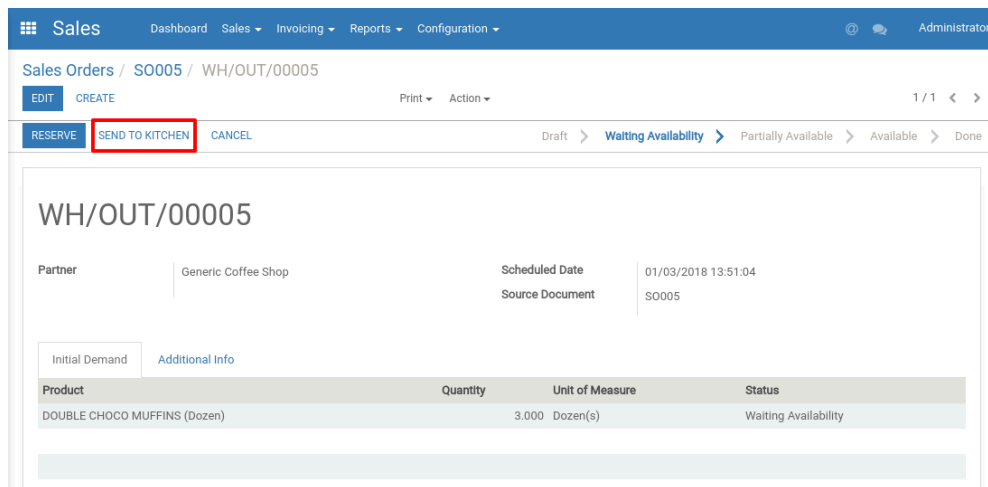
Click the **Delivery** option with a truck icon at the upper right section of the ordered page.



The screenshot shows the Odoo Sales Order form for SO005. The top navigation bar includes 'Sales', 'Dashboard', 'Sales', 'Invoicing', 'Reports', and 'Configuration'. The breadcrumb trail is 'Sales Orders / SO005'. The form includes buttons for 'SAVE' and 'DISCARD'. The 'Delivery' button, represented by a truck icon, is highlighted with a red arrow. The form also displays customer information, confirmation date, and a table of 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

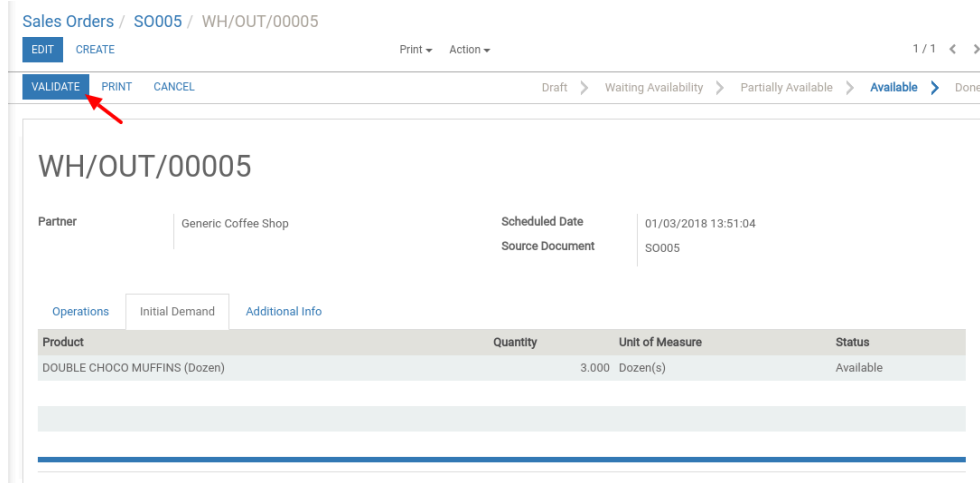
Click the **Send To Kitchen** button. This sends the product orders to the kitchen.



The screenshot shows the Odoo Sales Order form for WH/OUT/00005. The top navigation bar includes 'Sales', 'Dashboard', 'Sales', 'Invoicing', 'Reports', and 'Configuration'. The breadcrumb trail is 'Sales Orders / SO005 / WH/OUT/00005'. The form includes buttons for 'RESERVE', 'SEND TO KITCHEN' (highlighted with a red box), and 'CANCEL'. The form also displays partner information, scheduled date, and a table of order lines.

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

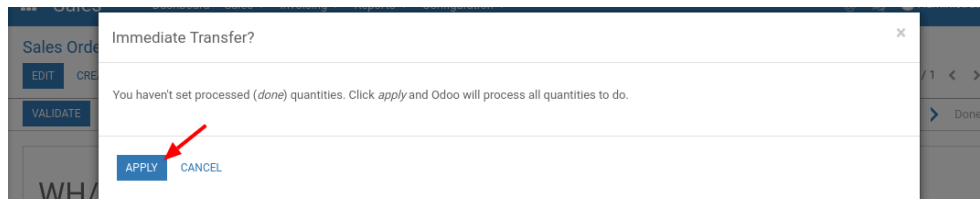
WH/OUT/00005

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.



Immediate Transfer?

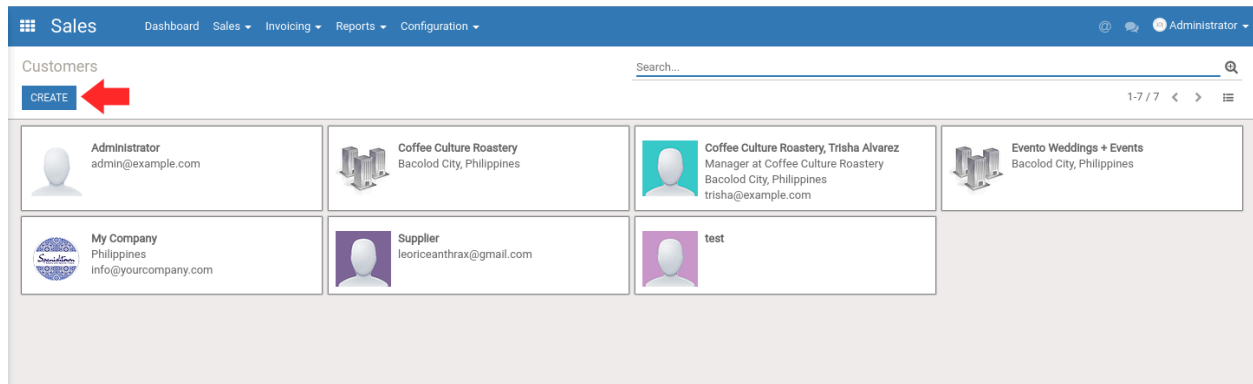
You haven't set processed (*done*) quantities. Click *apply* and Odoo will process all quantities to do.

APPLY CANCEL

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

2.2 Creating new Customers

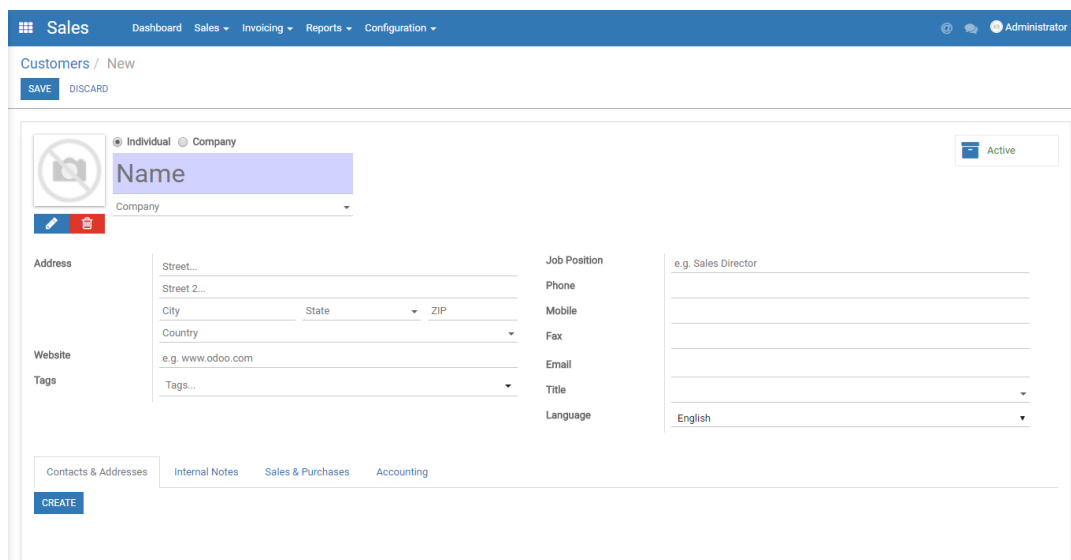
Click the **Customers** submenu option under the Sale Menu. User will be navigated to the Customer page. Customers page contains the list of Spanish Town's customer list. Please see image below.



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



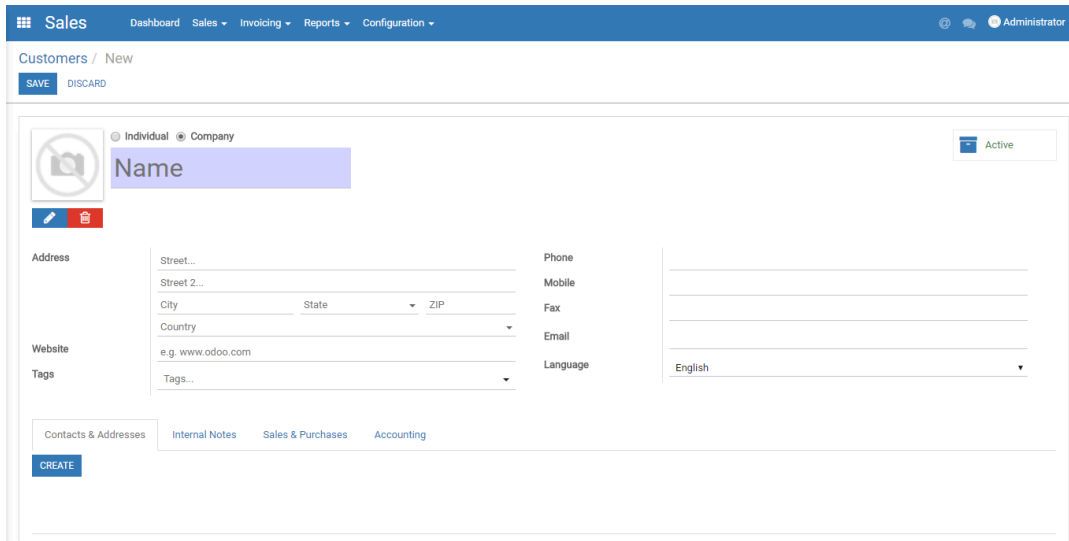
The screenshot shows the 'Customers / New' form in Odoo. The 'Individual' radio button is selected. The form includes fields for Name, Company, Address (Street, City, State, ZIP, Country), Website, Tags, Job Position, Phone, Mobile, Fax, Email, Title, and Language. There are also tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', and 'Accounting'. A 'CREATE' button is at the bottom left.

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		
Tags	Language English		


Contacts & Addresses Internal Notes Sales & Purchases Accounting

NEW MESSAGE Log an internal note Follow 0

After Creating Customer (Individual):

Customers / Coffee Culture Roastery, Trisha Alvarez

EDIT CREATE Print Action 3 / 7 < >



Trisha Alvarez

Coffee Culture Roastery

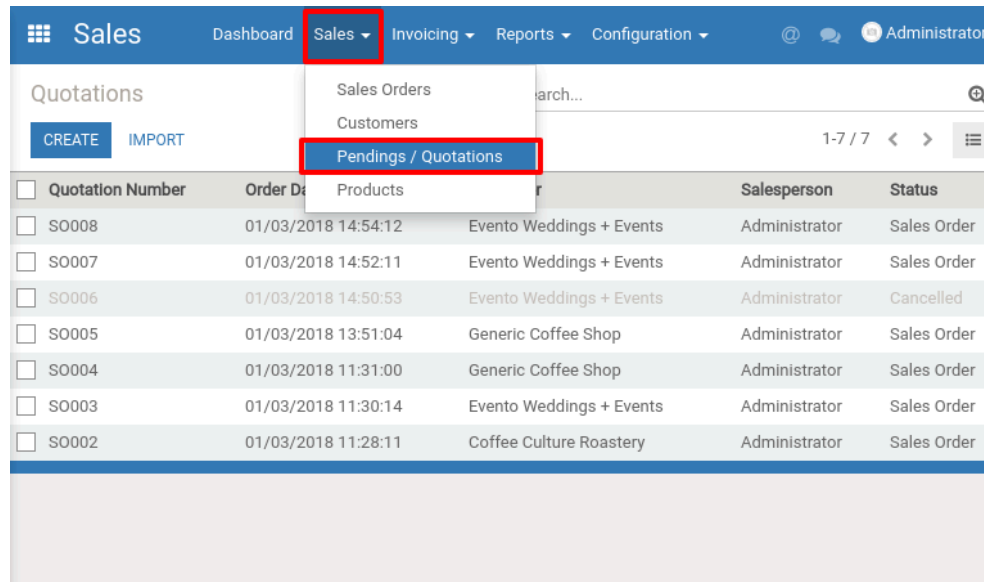
Address	Bacolod-San Carlos City Rd Bacolod City 6100 Philippines	Job Position Phone Mobile Fax Email Title Language	Manager 0922 934 3872 trisha@example.com English
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Contacts & Addresses Internal Notes Sales & Purchases Accounting

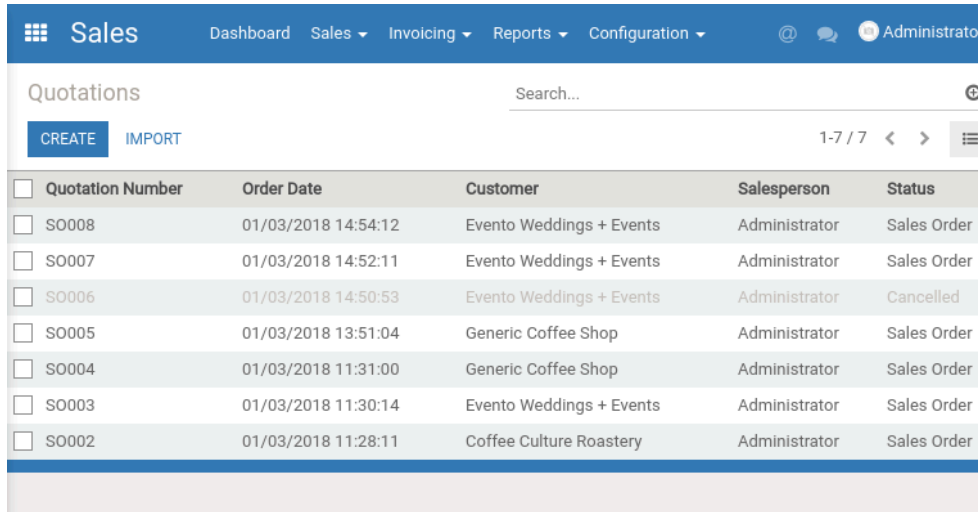
NEW MESSAGE Log an internal note Following 1 Today

2.3 Creating new Quotations

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



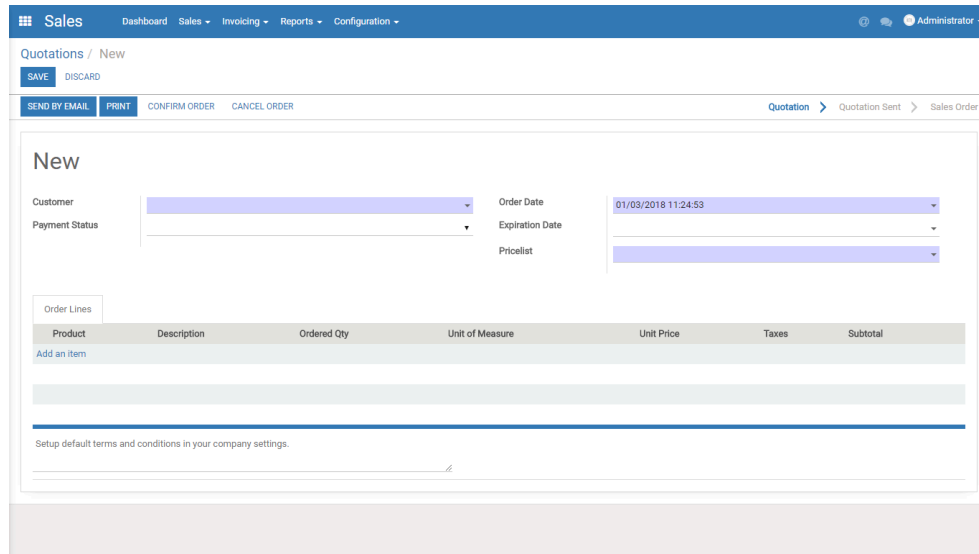
Clicking the **Quotations** submenu under Sales menu will load the page on the Quotations page shown below.



The screenshot shows the Odoo Quotations page. The page title is 'Quotations'. There are buttons for 'CREATE' and 'IMPORT'. A search bar is present. The table below lists the quotations.

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.



The screenshot shows the 'New Quotation' form in the Odoo Sales module. The header bar includes 'Sales' and navigation links for Dashboard, Sales, Invoicing, Reports, and Configuration. The user is logged in as 'Administrator'. The form has a breadcrumb trail: 'Quotations / New'. Below this are buttons for 'SAVE' and 'DISCARD'. A secondary bar contains 'SEND BY EMAIL', 'PRINT', 'CONFIRM ORDER', and 'CANCEL ORDER'. On the right, a status bar shows 'Quotation' as the current step, followed by 'Quotation Sent' and 'Sales Order'. The main form area is titled 'New' and contains several fields: 'Customer' (a dropdown menu), 'Payment Status' (a dropdown menu), 'Order Date' (a date field showing '01/03/2018 11:24:53'), 'Expiration Date' (a date field), and 'Pricelist' (a dropdown menu). Below these fields is a section for 'Order Lines' with a table header: 'Product', 'Description', 'Ordered Qty', 'Unit of Measure', 'Unit Price', 'Taxes', and 'Subtotal'. A link 'Add an item' is provided to add new lines. At the bottom, there is a text area for 'Setup default terms and conditions in your company settings.' with a small icon for inserting a link.

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
Payment Status

Order Date
01/03/2018 15:02:50
Expiration Date
Pricelist

Order Lines

Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Subtotal
		1.000		0.00		0.00

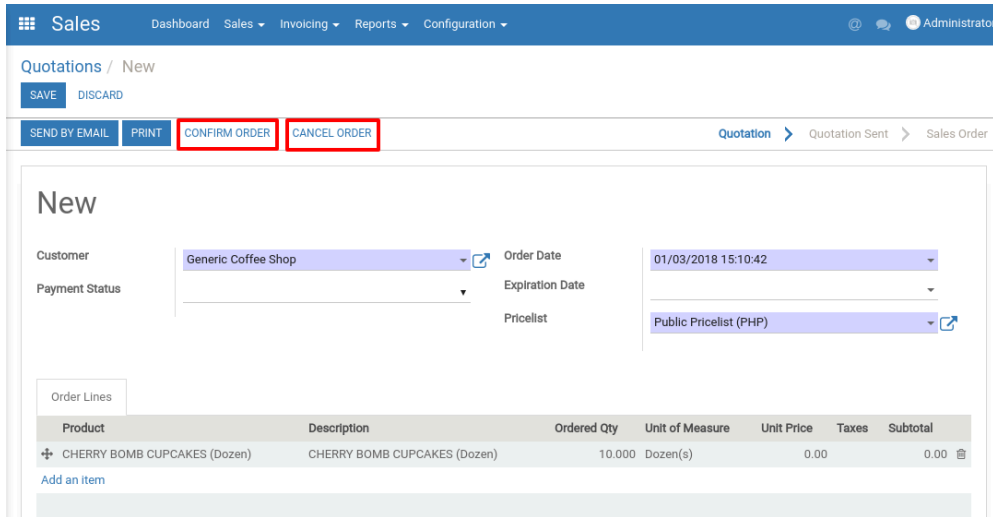
Add an item

Setup default terms and conditions in your company settings.

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

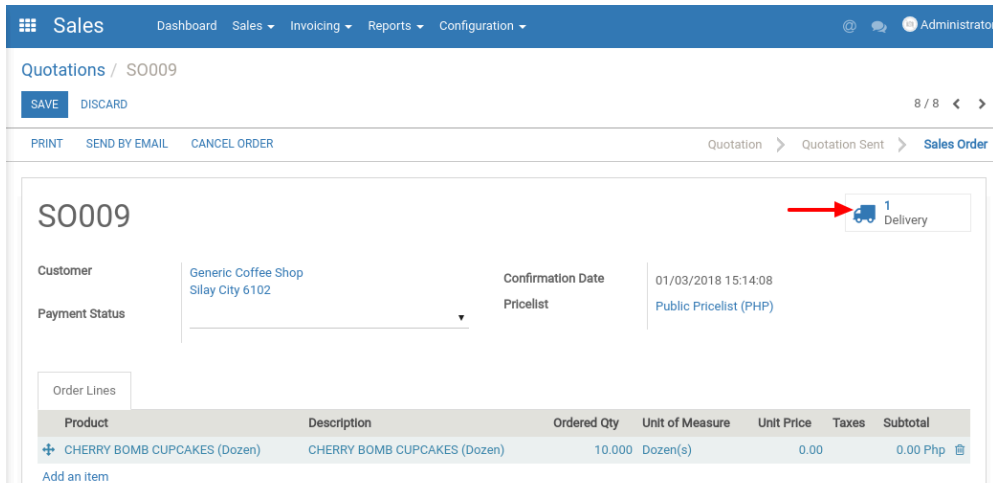
- Choose **Product**.
- **Description** - Whatever you choose on the Product it will automatically appear in this field.
- Enter **Ordered Qty**.
- **Unit of Measure** - Will automatically display its content depending on the product's unit of measurement.
- **Unit Price** - Will automatically display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



The screenshot shows the 'New' form for a quotation in Odoo. The header bar includes 'Sales' and navigation links. Below the header, there are buttons for 'SEND BY EMAIL', 'PRINT', 'CONFIRM ORDER', and 'CANCEL ORDER'. The 'CONFIRM ORDER' and 'CANCEL ORDER' buttons are highlighted with red boxes. The form fields include 'Customer' (Generic Coffee Shop), 'Order Date' (01/03/2018 15:10:42), 'Expiration Date', and 'Pricelist' (Public Pricelist (PHP)). Below these fields is a table for 'Order Lines' with columns: Product, Description, Ordered Qty, Unit of Measure, Unit Price, Taxes, and Subtotal. The table contains one row for 'CHERRY BOMB CUPCAKES (Dozen)' with a quantity of 10.000 and a unit price of 0.00. There is an 'Add an item' link below the table.

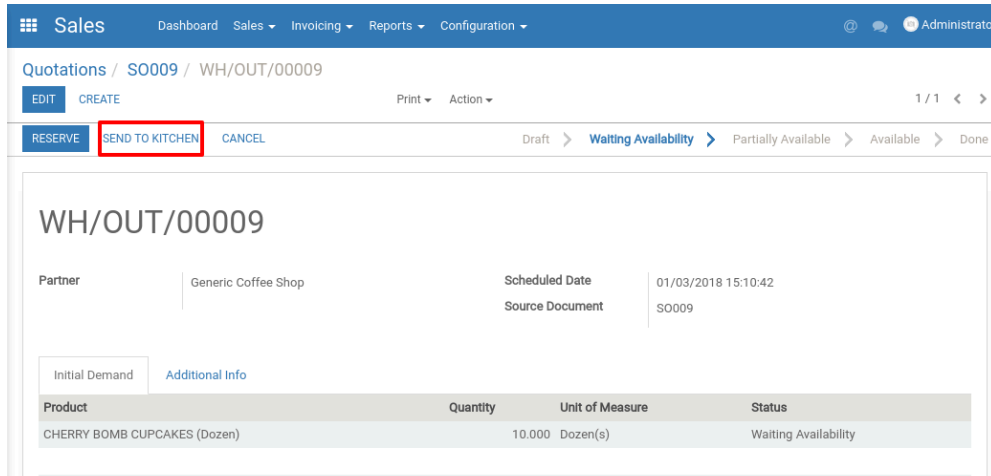
Click the **Delivery** button with a truck icon at the upper right section of the page.



The screenshot shows the 'S0009' form for a quotation in Odoo. The header bar includes 'Sales' and navigation links. Below the header, there are buttons for 'PRINT', 'SEND BY EMAIL', and 'CANCEL ORDER'. The 'Delivery' button, which has a truck icon, is highlighted with a red arrow. The form fields include 'Customer' (Generic Coffee Shop, Silay City 6102), 'Confirmation Date' (01/03/2018 15:14:08), and 'Pricelist' (Public Pricelist (PHP)). Below these fields is a table for 'Order Lines' with columns: Product, Description, Ordered Qty, Unit of Measure, Unit Price, Taxes, and Subtotal. The table contains one row for 'CHERRY BOMB CUPCAKES (Dozen)' with a quantity of 10.000 and a unit price of 0.00. There is an 'Add an item' link below the table.

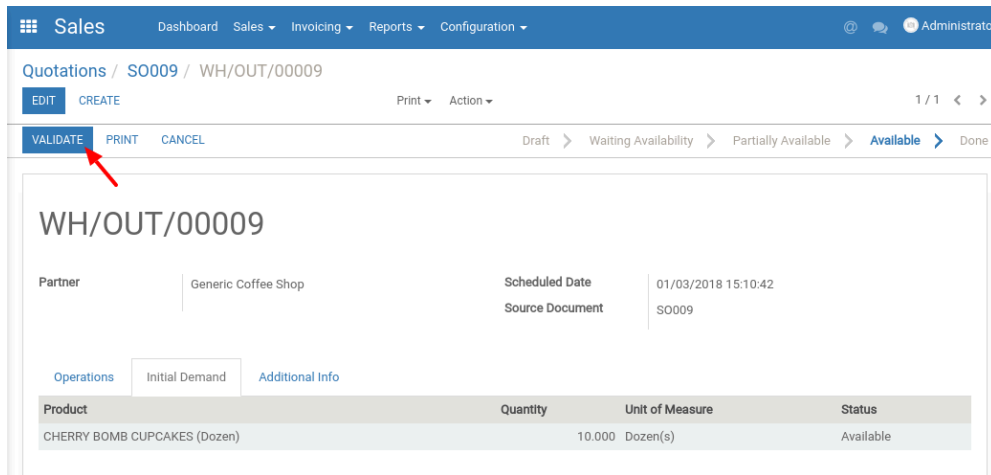
Note: Same Instructions can be applied to Creating Sales orders.

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



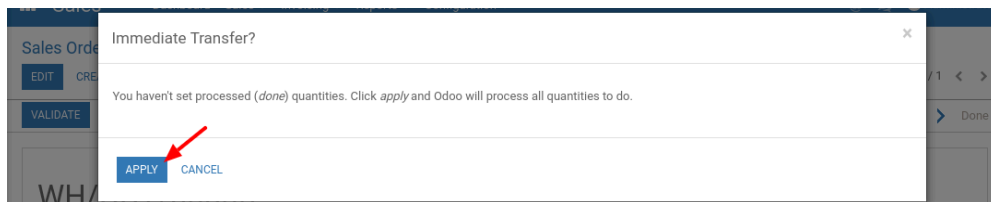
The screenshot shows the Odoo Sales interface for a quotation. The top bar includes 'Sales', 'Dashboard', 'Sales', 'Invoicing', 'Reports', and 'Configuration'. The breadcrumb trail is 'Quotations / SO009 / WH/OUT/00009'. Below this, there are buttons for 'RESERVE', 'SEND TO KITCHEN' (highlighted with a red box), and 'CANCEL'. The status bar shows 'Draft', 'Waiting Availability', 'Partially Available', 'Available', and 'Done'. The main content area displays the quotation details for 'WH/OUT/00009' for 'Generic Coffee Shop'. The 'Initial Demand' tab is active, showing a table with one row: 'CHERRY BOMB CUPCAKES (Dozen)' with a quantity of '10.000' and status 'Waiting Availability'.

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



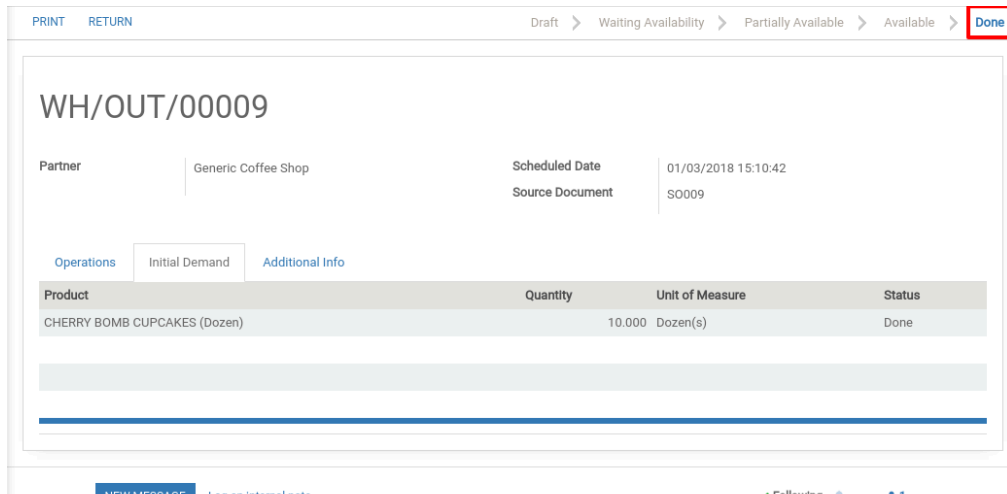
The screenshot shows the Odoo Sales interface for the same quotation. The 'VALIDATE' button is now highlighted with a red arrow. The status bar shows 'Draft', 'Waiting Availability', 'Partially Available', 'Available', and 'Done'. The 'Operations' tab is now active, showing the same table as before, but the status for 'CHERRY BOMB CUPCAKES (Dozen)' is now 'Available'.

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



The screenshot shows a modal dialog titled 'Immediate Transfer?'. It contains the text: 'You haven't set processed (done) quantities. Click apply and Odoo will process all quantities to do.' At the bottom, there are two buttons: 'APPLY' (highlighted with a red arrow) and 'CANCEL'.

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.



PRINT RETURN Draft > Waiting Availability > Partially Available > Available > **Done**

WH/OUT/00009

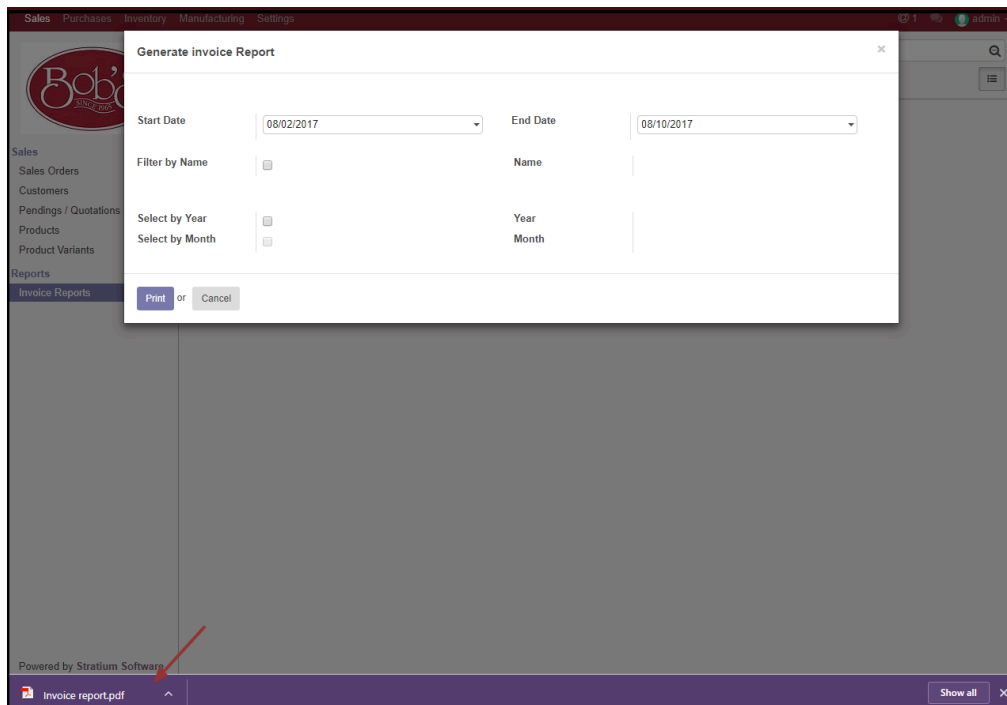
Partner: Generic Coffee Shop Scheduled Date: 01/03/2018 15:10:42
Source Document: SO009

Operations Initial Demand Additional Info

Product	Quantity	Unit of Measure	Status
CHERRY BOMB CUPCAKES (Dozen)	10.000	Dozen(s)	Done

2.4 Generating Invoice

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



Sales Purchases Inventory Manufacturing Settings

Bob's BAKERY

Sales
Sales Orders
Customers
Pendings / Quotations
Products
Product Variants
Reports
Invoice Reports

Generate invoice Report

Start Date: 08/02/2017 End Date: 08/10/2017

Filter by Name: ☐ Name:

Select by Year: ☐ Year:
Select by Month: ☐ Month:

Print or Cancel

Powered by Stratum Software

Invoice report.pdf Show all

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.

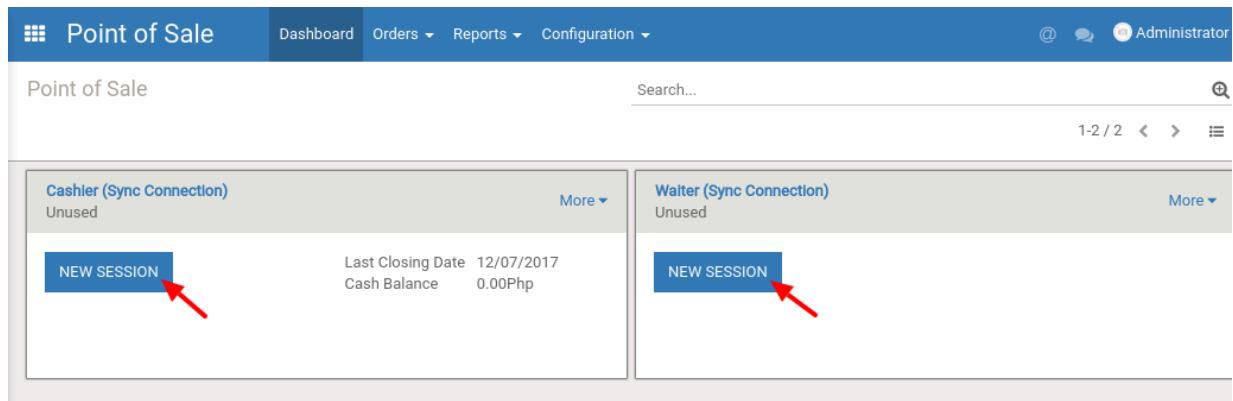
Then the PDF form of generated report sample data.

Invoice Report				
Sales Date		Date : 2017-08-10 17:14		
Date from : 2017-07-20				
Date to : 2017-08-10				
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

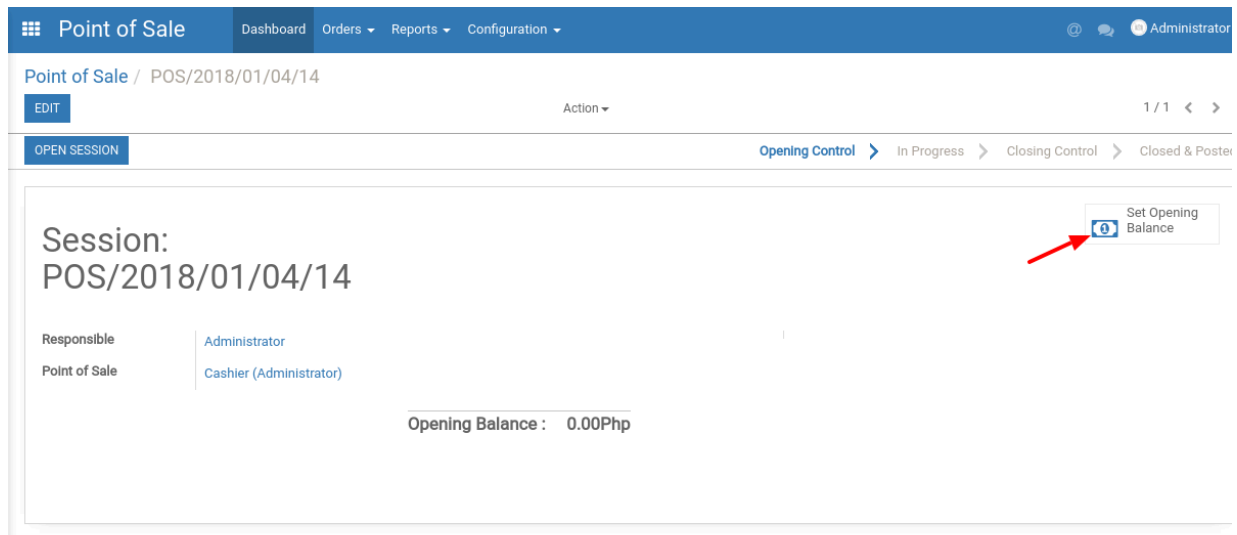
In the main menu , click **Point of Sale**. User should be navigated to the Dashboard submenu page.

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.

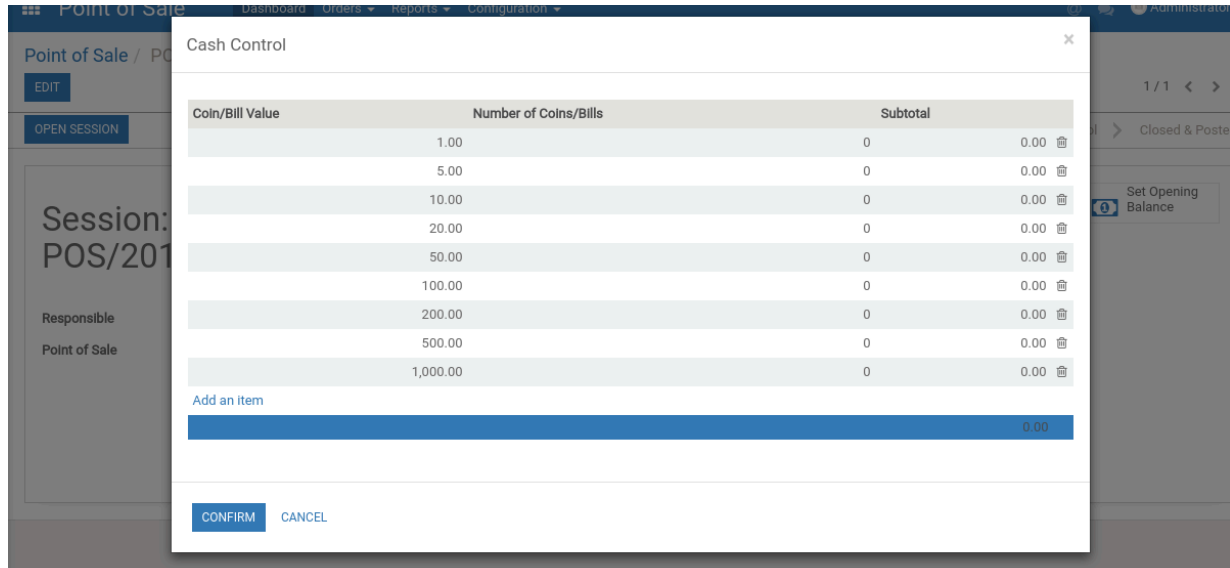


3.1 New Session

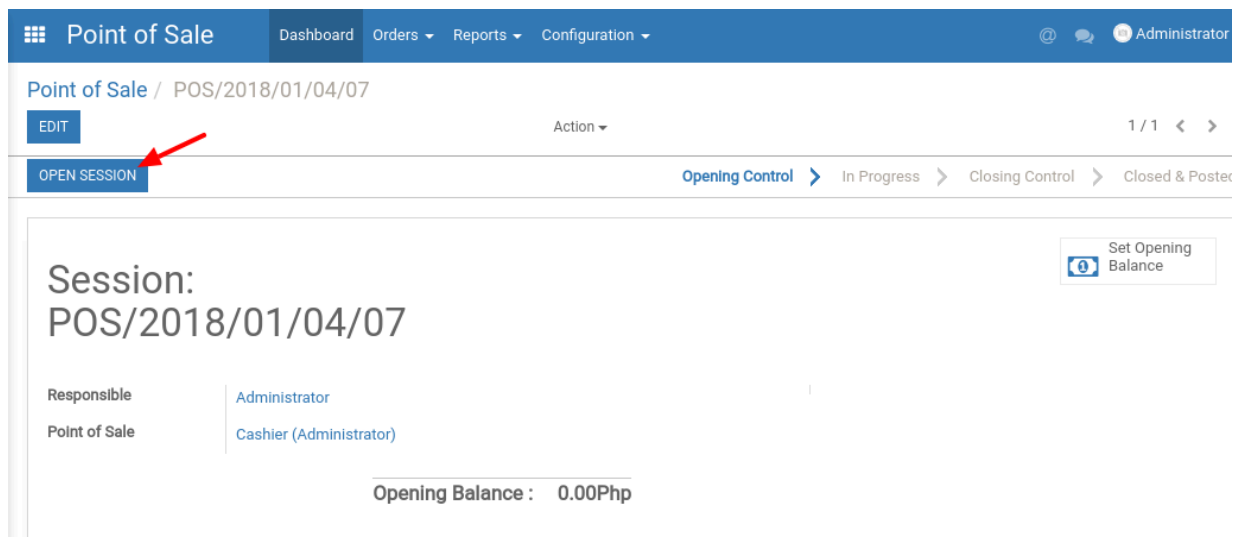
When **New Session** button is clicked, the session's page is displayed.



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

[EDIT](#) Action 1 / 1 < >

[CONTINUE SELLING](#) [END OF SESSION](#) Opening Control > In Progress > Closing Control > Closed & Posted

Session:
POS/2018/01/04/13

Responsible: Administrator
Point of Sale: Waiter (Administrator)

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

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

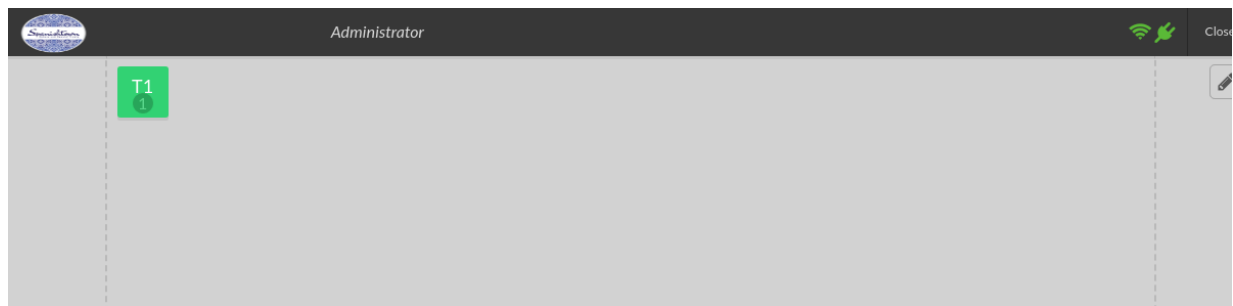
Real Closing Balance : 0.00Php

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

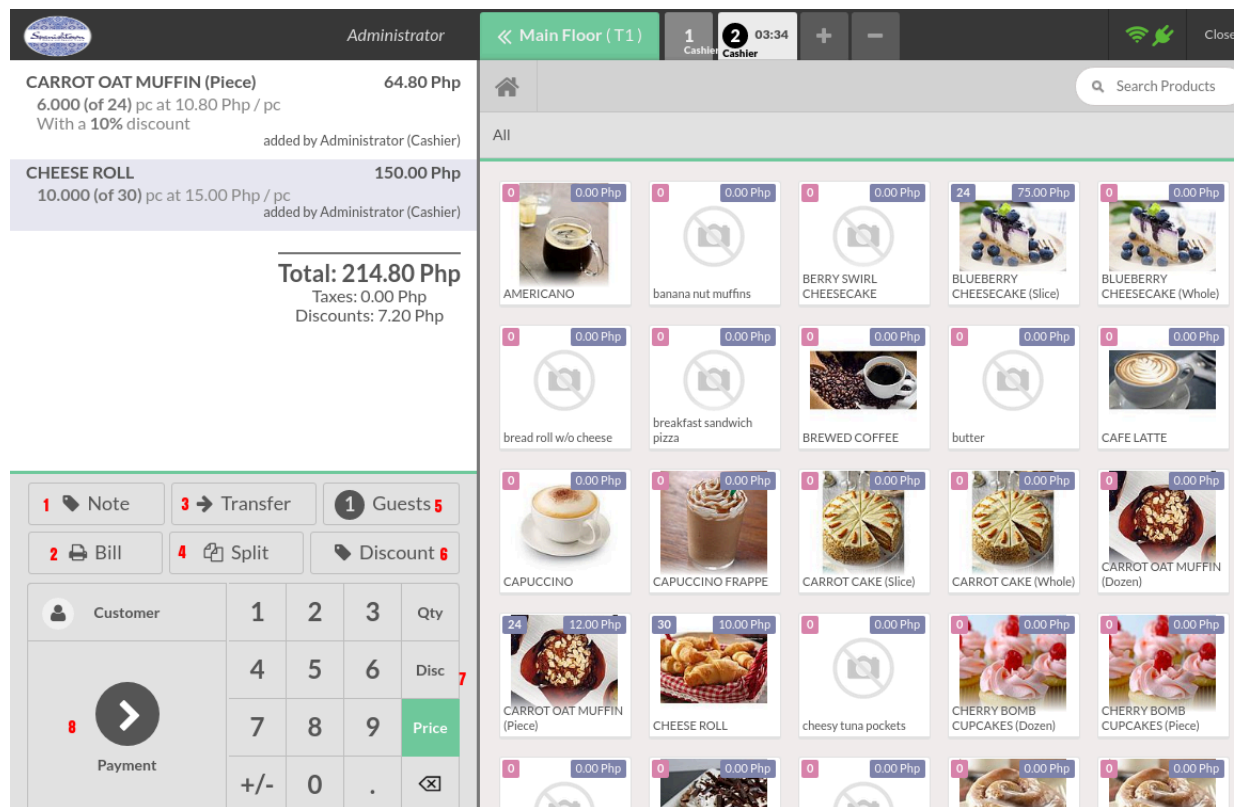
The POS page will, by default, display the available tables as shown on the image below.



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.

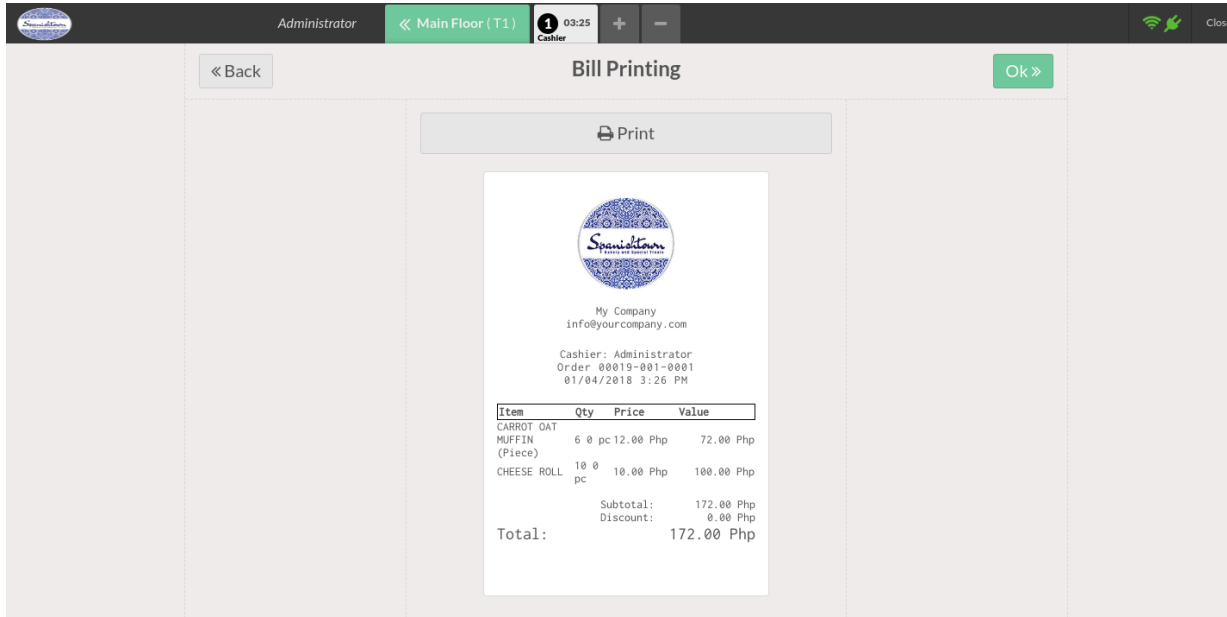
Each option will be explained in the following pages.

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.

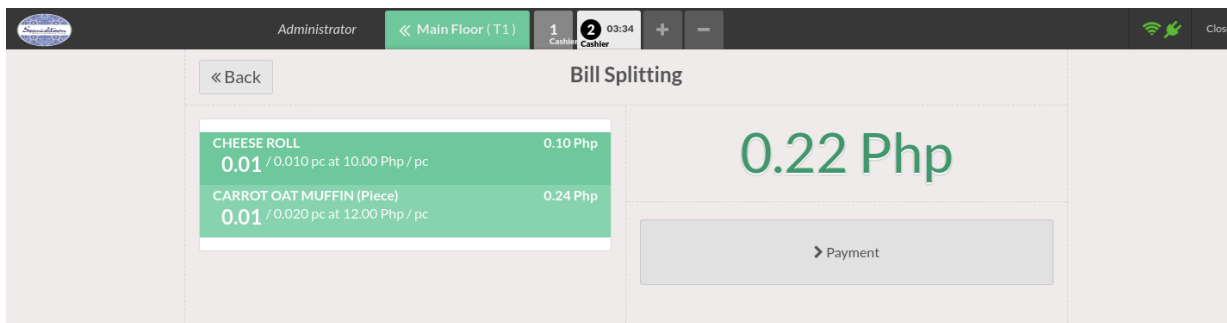


3.2.3 Transfer

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.

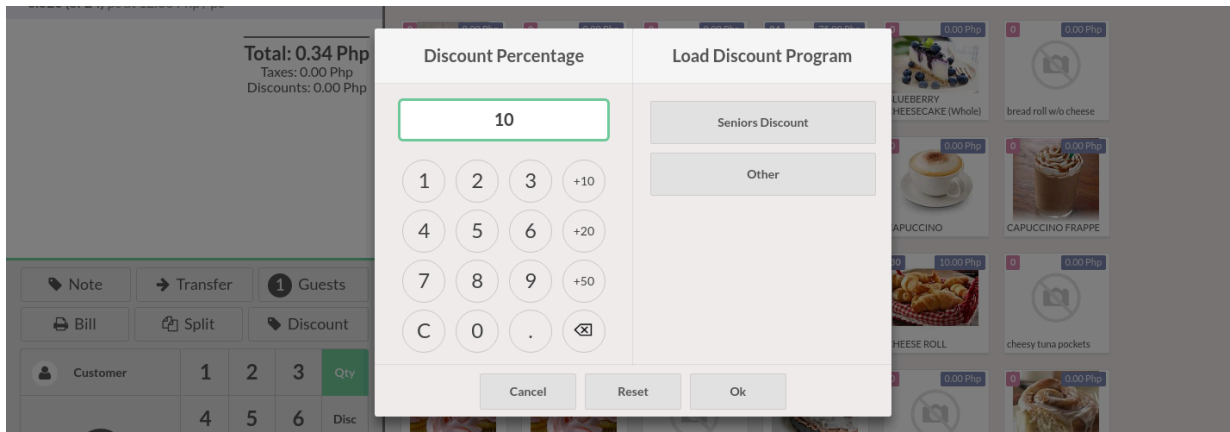


3.2.5 Guests

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.

Due	Tendered	Change	Method
214.80	300.00	85.20	Cash (PHP)

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.

Change: 85.20 Php

Next Order »

Print Receipt

Spanieltown Bakery and Sweets House

My Company
info@yourcompany.com

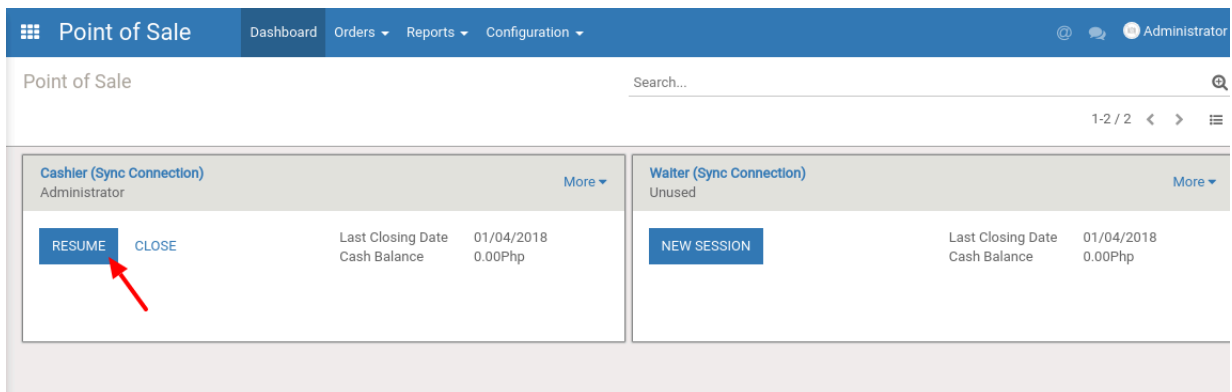
Cashier: Administrator
Order: 00019-006-0004
01/04/2018 4:30 PM

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.

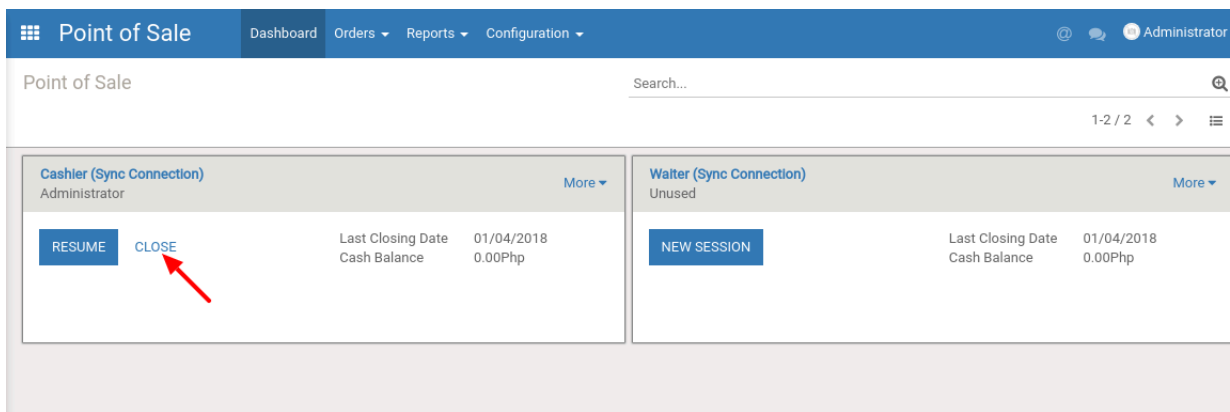


To resume the session, click the **Resume** button found in the Dashboard page of Point of Sales.

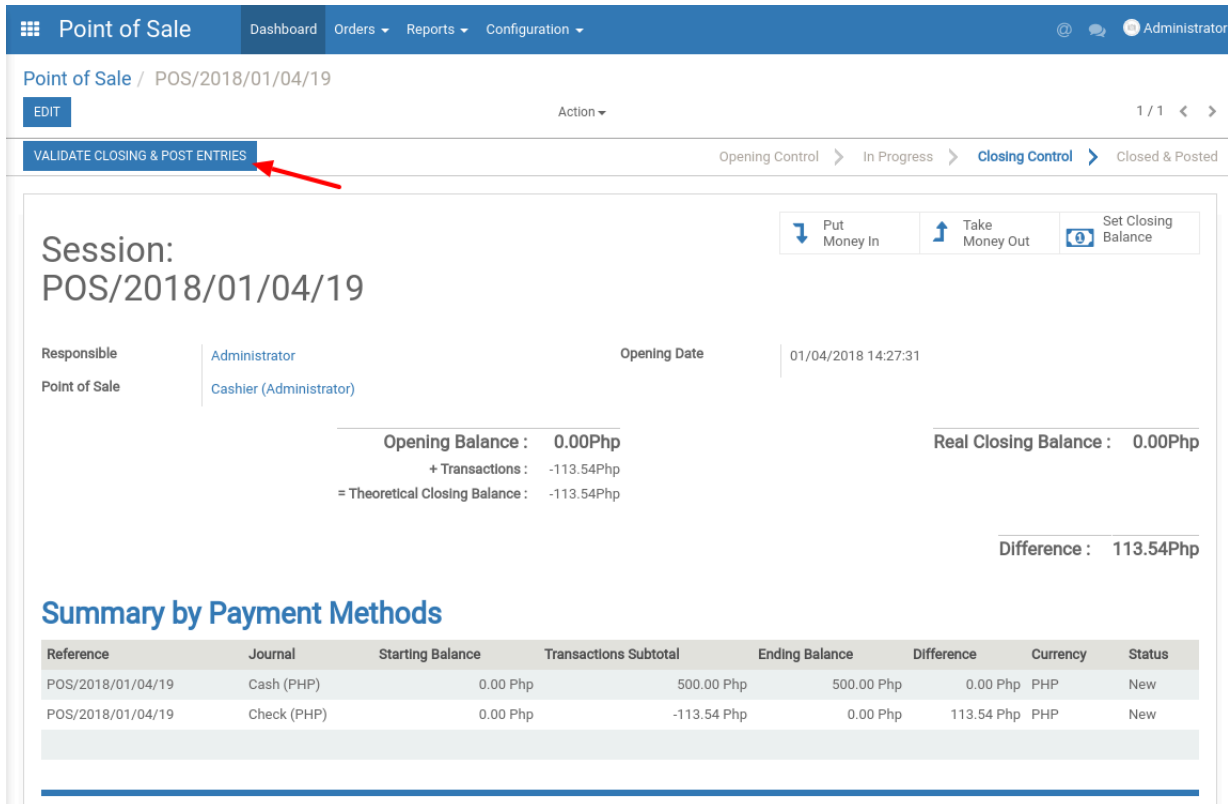


3.3 Closing Session

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. The top navigation bar includes 'Point of Sale', 'Dashboard', 'Orders', 'Reports', and 'Configuration'. The user is logged in as 'Administrator'. The main header shows 'Point of Sale / POS/2018/01/04/19'. Below this, there is a navigation bar with 'VALIDATE CLOSING & POST ENTRIES' (highlighted with a red arrow), 'Opening Control', 'In Progress', 'Closing Control', and 'Closed & Posted'. The main content area displays session information for 'POS/2018/01/04/19'. It includes fields for 'Responsible' (Administrator), 'Point of Sale' (Cashier (Administrator)), and 'Opening Date' (01/04/2018 14:27:31). Below this, there is a summary of balances: 'Opening Balance : 0.00Php', '+ Transactions : -113.54Php', '= Theoretical Closing Balance : -113.54Php', and 'Real Closing Balance : 0.00Php'. The 'Difference' is shown as '113.54Php'. At the bottom, there is a section titled 'Summary by Payment Methods' with a table showing transactions for 'Cash (PHP)' and 'Check (PHP)'.

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

<input type="checkbox"/>	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		

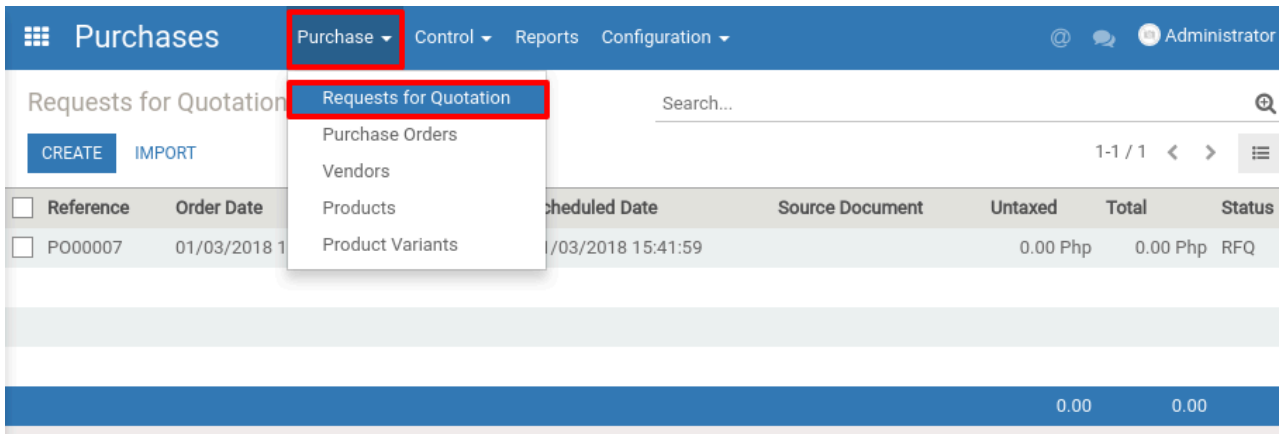
To view the sessions, select the **Sessions** submenu under the Orders menu. The Sessions page will display a list of sessions with their Session ID, Responsible, Opening Date, Closing Date, and Status for viewing.

Point of Sale						
Dashboard Orders Reports Configuration				Administrator (STB_01_04_2017_TRISH)		
Sessions				Search...		
				1-15 / 15 < >		
<input type="checkbox"/>	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.

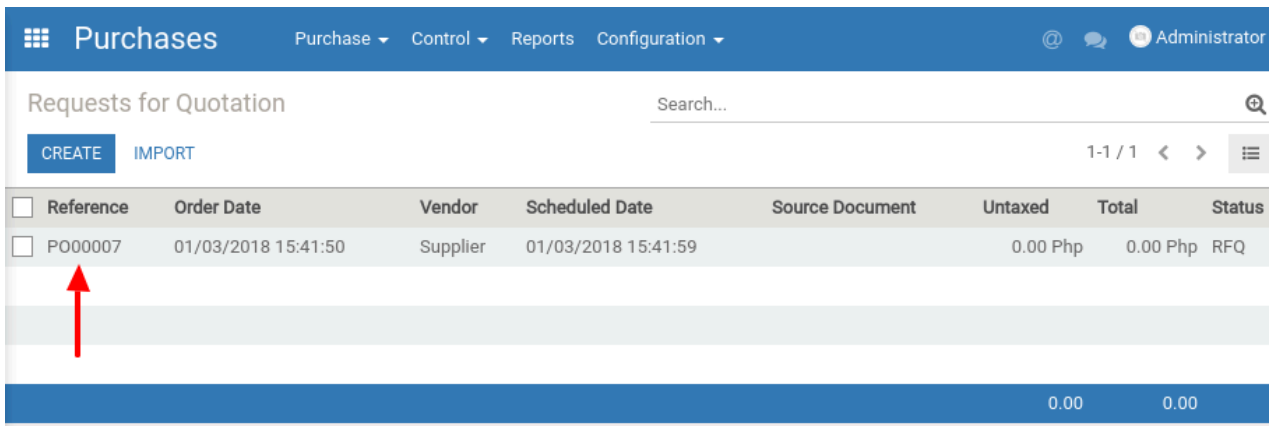
Click the **Requests for Quotation** submenu under **Purchases** menu. Page will display the Request for Quotation list table. **Requests for Quotation** is the default page of **Purchase** menu.



The screenshot shows the Odoo interface with the 'Purchases' menu open. The 'Purchase' dropdown is highlighted with a red box, and the 'Requests for Quotation' option is also highlighted with a red box. Below the menu, the 'Requests for Quotation' page is visible, showing a table with columns: Reference, Order Date, Vendor, Scheduled Date, Source Document, Untaxed, Total, and Status. The first row shows a request for quotation with reference PO00007, order date 01/03/2018, and status RFQ.

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 'Requests for Quotation' page in Odoo. A red arrow points to the first row of the table, which has the reference PO00007. The table columns are: Reference, Order Date, Vendor, Scheduled Date, Source Document, Untaxed, Total, and Status. The first row shows a request for quotation with reference PO00007, order date 01/03/2018 15:41:50, vendor Supplier, scheduled date 01/03/2018 15:41:59, and status RFQ.

4.1.2 Purchase Order Details

Purchase Order Details will look like on the image below.

Requests for Quotation / PO00007

1 **EDIT** **CREATE** 2 10 Print 11 Action 1 / 1 < >

3 **SEND RFQ BY EMAIL** 4 **PRINT RFQ** 5 **CONFIRM ORDER** 6 **CANCEL** RFQ > RFQ Sent > Purchase Order

Request for Quotation

Vendor Supplier Order Date 01/03/2018 15:41:50

Vendor Reference Currency PHP

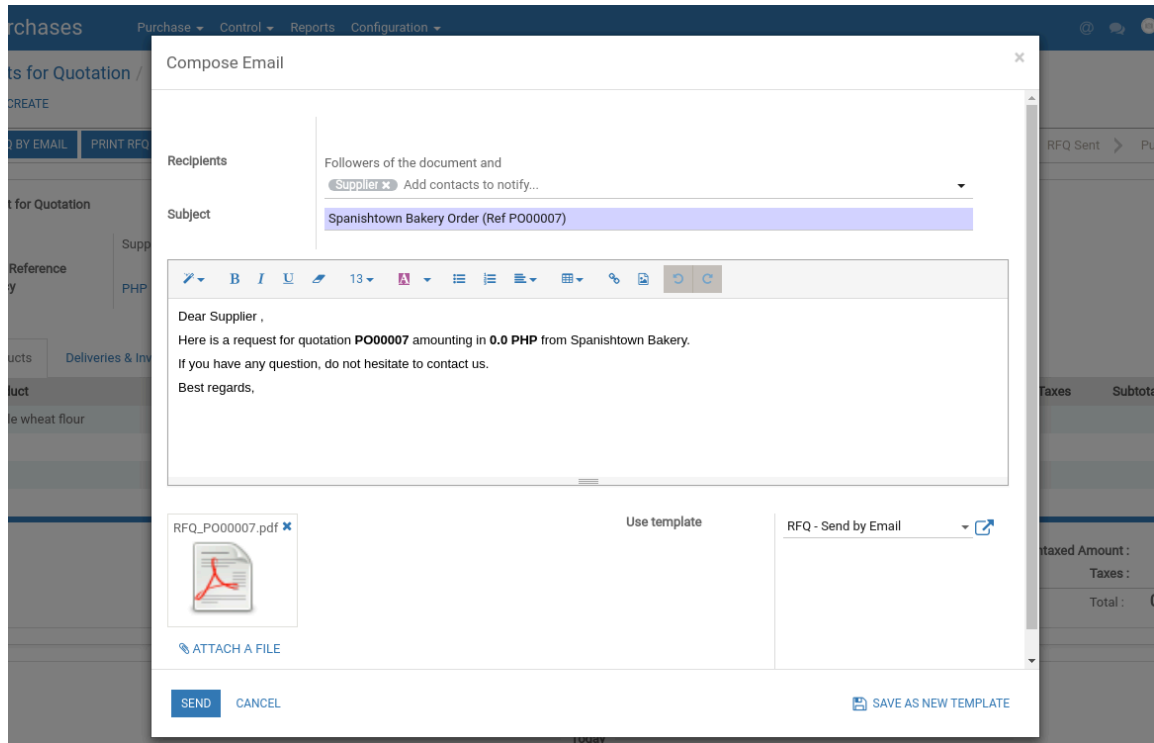
7 **Products** 8 **Deliveries & Invoices**

Product	Description	Scheduled Date	Quantity	Product Unit of Measure	Unit Price	Taxes	Subtotal
9 whole wheat flour	whole wheat flour	01/03/2018 15:41:59	500.000	g		0.00	0.00 Php

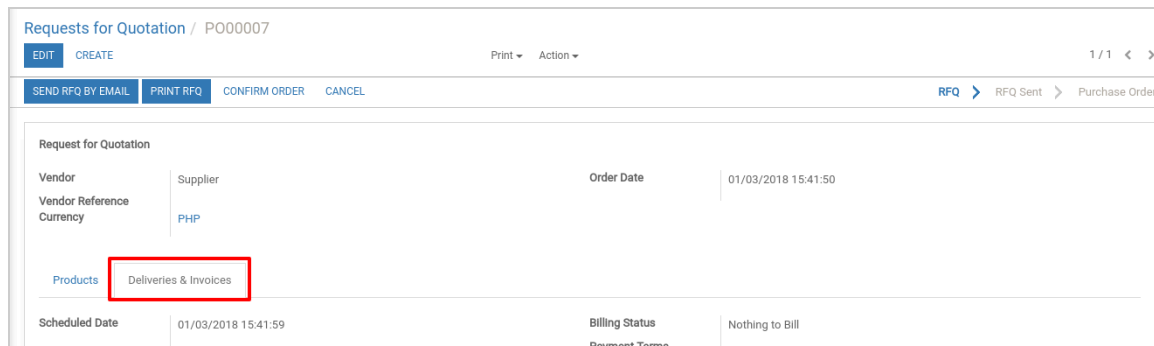
Untaxed Amount : 0.00Php
Taxes : 0.00Php
Total : 0.00Php

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.

Purchases

Purchase

Control

Reports

Configuration

@

Administrator

Purchase Orders

Search...

CREATE

IMPORT

1-2 / 2

<input type="checkbox"/>	Reference	Order Date	Vendor	Scheduled Date	Source Document	Untaxed	Total	Status
<input type="checkbox"/>	PO00006	01/03/2018 15:39:55	Supplier	01/03/2018 15:40:03		0.00 Php	0.00 Php	Purchase Order
<input type="checkbox"/>	PO00005	01/03/2018 15:37:12	Supplier	01/03/2018 15:38:55		0.00 Php	0.00 Php	Purchase Order
						0.00	0.00	

4.2.1 Create Purchase orders

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

Purchase Orders / New

1 SAVE DISCARD 2

3 SEND RFQ BY EMAIL 4 PRINT RFQ 5 CONFIRM ORDER 6 CANCEL

RFQ > RFQ Sent > Purchase Order

Request for Quotation

Vendor 7 Order Date 01/03/2018 16:04:26 9

Vendor Reference 8

Currency 10

11 Products 12 Deliveries & Invoices

Product	Description	Scheduled Date	Quantity	Received Qty	Billed Qty	Product Unit of Measure	Unit Price	Taxes	Subtotal
Add an item 13									

An administrator can set up default Terms and conditions in your Company settings.

Untaxed Amount : 0.00

Taxes : 0.00

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: Order Date:

Vendor Reference:

Currency: 

[Products](#) [Deliveries & Invoices](#)


Product	Description	Scheduled Date	Quantity	Received Qty	Billed Qty	Product Unit of Measure	Unit Price	Taxes	Subtotal
<input type="text" value="a"/>	<input type="text" value="b"/>	<input type="text" value="c"/>	<input type="text" value="d"/> 0.000	0.000	0.000	<input type="text" value="e"/>	<input type="text" value="f"/> 0.00	<input type="text"/>	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](#) [@](#) [💬](#) [👤 Administrator](#)

Vendors 


[CREATE](#) 1-3 / 3 < > 




Chefs & Bakers
Bacolod City



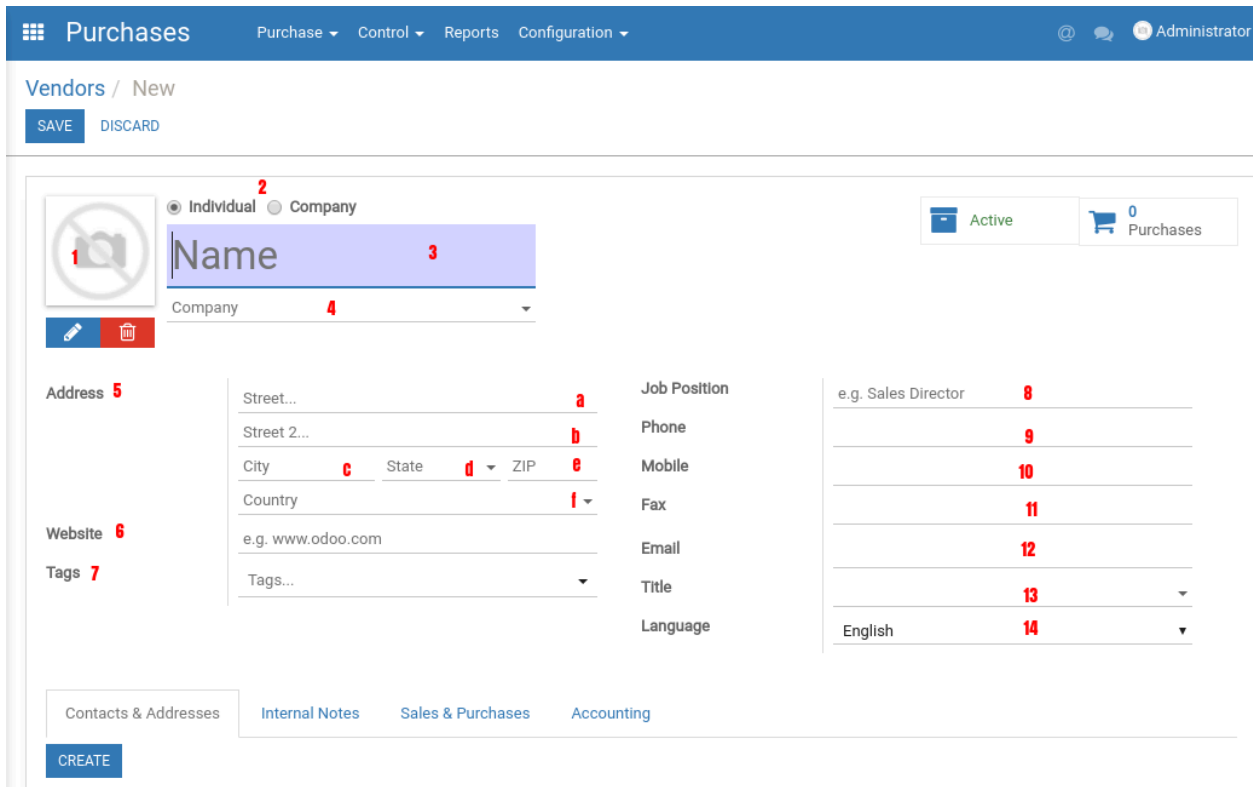
Dumaguete Fruits Co.
Dumaguete City



Supplier
leoriceanthrax@gmail.com
 3

4.3.1 Create Vendor

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



The screenshot shows the 'Vendors / New' form in Odoo. The form is divided into several sections. At the top, there's a header bar with 'Purchases' and navigation links. Below it, there's a 'Vendors / New' section with 'SAVE' and 'DISCARD' buttons. The main form area has a profile picture upload icon (1), a radio button to select 'Individual' (2) or 'Company' (3), and a 'Name' field (3). Below the name is a 'Company' dropdown (4). To the right, there's a status 'Active' and a '0 Purchases' indicator. The 'Address' section (5) includes fields for 'Street...' (a), 'Street 2...' (b), 'City' (c), 'State' (d), 'ZIP' (e), and 'Country' (f). There's also a 'Website' field (6) and a 'Tags' field (7). The 'Job Position' section includes fields for 'Job Position' (8), 'Phone' (9), 'Mobile' (10), 'Fax' (11), 'Email' (12), 'Title' (13), and 'Language' (14). At the bottom, there's a 'CREATE' button and tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', and 'Accounting'.

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.

Purchases

Purchase ▾

Control ▾

Reports

Configuration ▾

Administrator

Products

Can be Purchased x

Search...

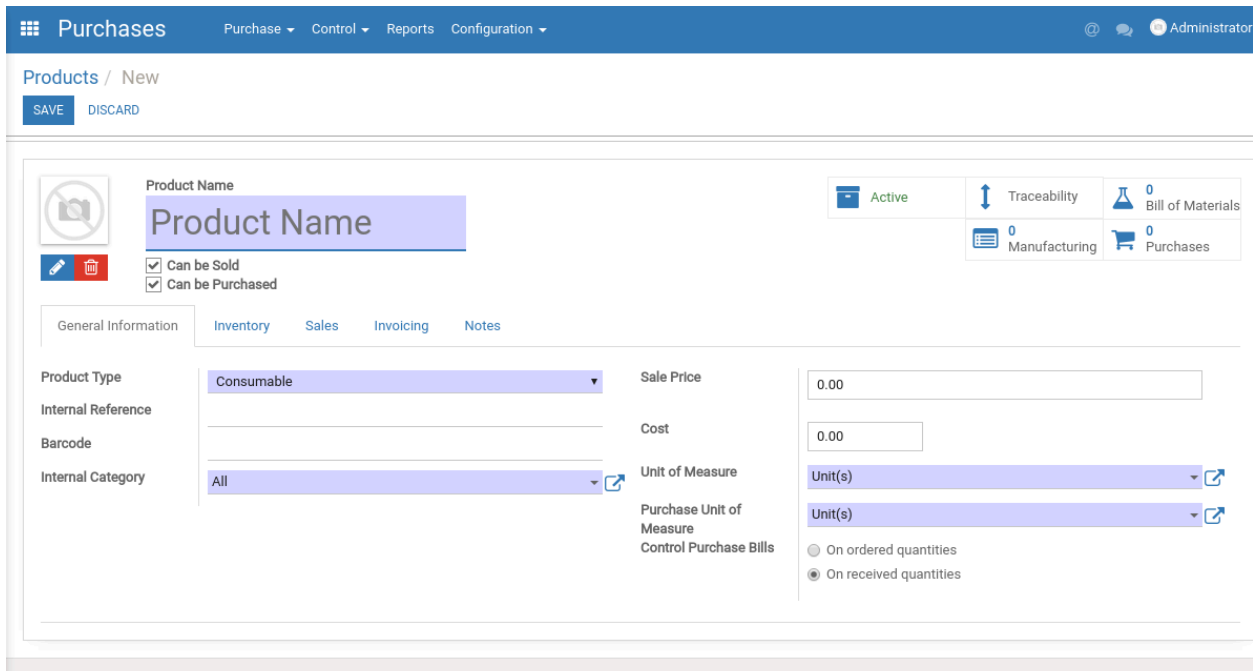
1-40 / 173

CREATE

<div><div></div><div>active dry yeast</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>	<div><div></div><div>all of the poolish</div><div>Price: 0.00Php</div><div>On hand: 0.000 Unit(s)</div></div>	<div><div></div><div>almond/cashew flour</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>
<div><div></div><div>aml</div><div>Price: 0.00Php</div></div>	<div><div></div><div>ap cream</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>	<div><div></div><div>ap flour</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>
<div><div></div><div>baguette mix</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>	<div><div></div><div>baking powder</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>	<div><div></div><div>baking soda</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>
<div><div></div><div>banana</div><div>Price: 0.00Php</div><div>On hand: 0.000 pc</div></div>	<div><div></div><div>banana nut muffins</div><div>Price: 0.00Php</div><div>On hand: 0.000 Unit(s)</div></div>	<div><div></div><div>berries</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>
<div><div></div><div>BERRY SWIRL CHEESECAKE</div><div>Price: 0.00Php</div><div>On hand: 0.000 wh (12 Slices)</div></div>	<div><div></div><div>bittersweet chocolate, chopped</div><div>Price: 0.00Php</div><div>On hand: 0.000 g</div></div>	<div><div><div></div></div><div>BLUEBERRY CHEESECAKE (Whole)</div><div>Price: 0.00Php</div><div>On hand: 0.000 wh (10 slices)</div></div>

4.4.1 Create Products

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



The screenshot shows the 'New Product' form in the Odoo interface. The top navigation bar includes 'Purchases', 'Purchase', 'Control', 'Reports', and 'Configuration'. The breadcrumb trail is 'Products / New'. Below the breadcrumb are 'SAVE' and 'DISCARD' buttons. The form is divided into several sections:

- Product Name:** A large text input field with a placeholder 'Product Name'.
- Product Image:** A camera icon for uploading a product image.
- Product Status:** A dropdown menu set to 'Active'.
- Traceability:** A dropdown menu set to 'Traceability'.
- Bill of Materials:** A dropdown menu set to '0'.
- Manufacturing:** A dropdown menu set to '0'.
- Purchases:** A dropdown menu set to '0'.
- General Information:** A tabbed section with sub-tabs for 'General Information', 'Inventory', 'Sales', 'Invoicing', and 'Notes'.
 - Product Type:** A dropdown menu set to 'Consumable'.
 - Internal Reference:** A text input field.
 - Barcode:** A text input field.
 - Internal Category:** A dropdown menu set to 'All'.
 - Sale Price:** A text input field set to '0.00'.
 - Cost:** A text input field set to '0.00'.
 - Unit of Measure:** A dropdown menu set to 'Unit(s)'.
 - Purchase Unit of Measure:** A dropdown menu set to 'Unit(s)'.
 - Control Purchase Bills:** A section with two radio buttons: 'On ordered quantities' (selected) and 'On received quantities'.

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.

Purchases

Purchase

Control

Reports

Configuration

@

Administrator

Product Variants

Can be Purchased

Search...

CREATE

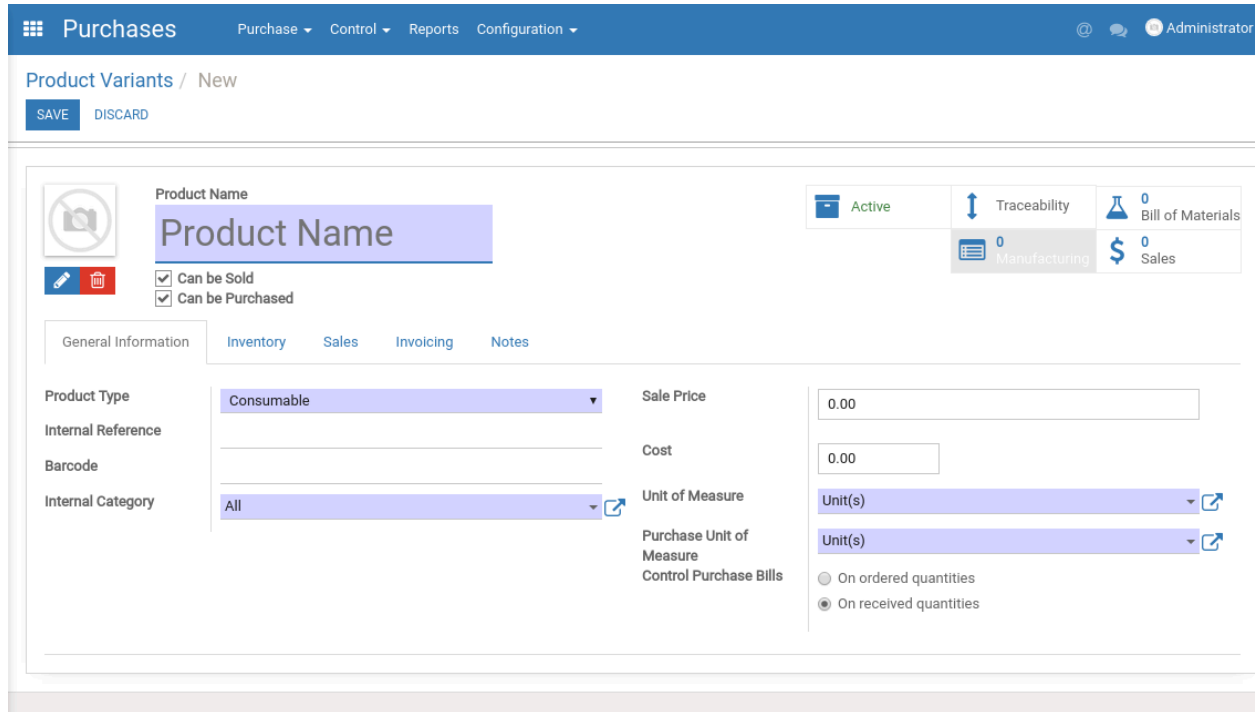
IMPORT

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<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.



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.

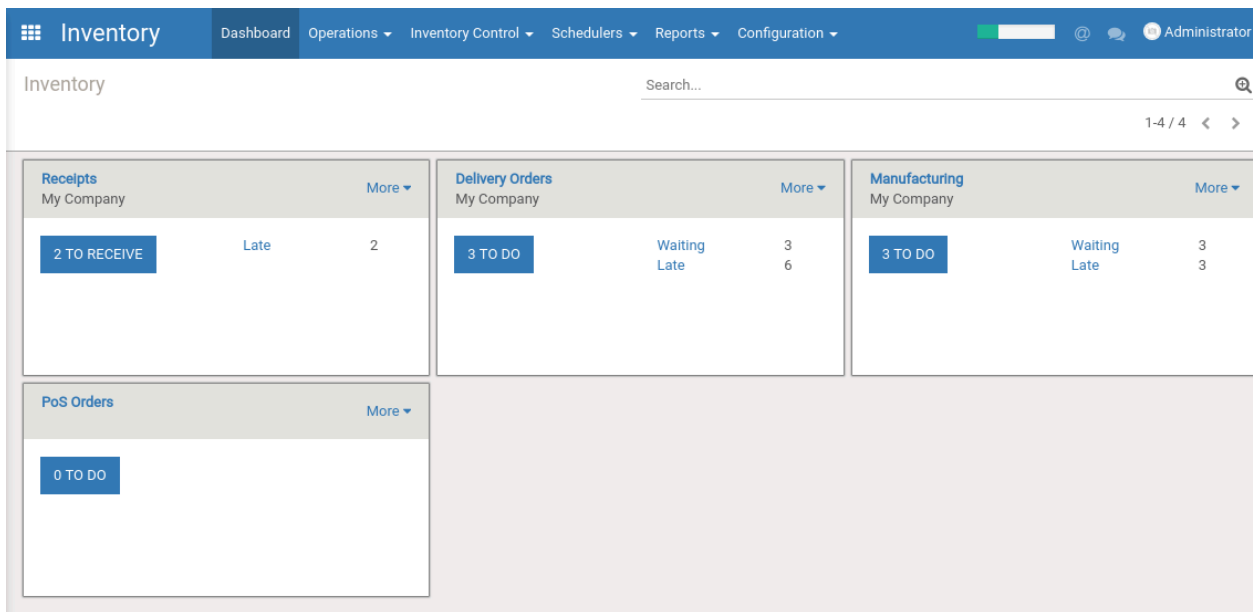
Click the **Save** button to save the created new products and click the **Discard** otherwise.

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', and 'Configuration'. The main content area is titled 'Inventory' and features a search bar and a pagination indicator '1-4 / 4'. Below the header, there are four sections: 'Receipts', 'Delivery Orders', 'Manufacturing', and 'PoS Orders'. Each section displays a '2 TO RECEIVE' or '3 TO DO' button, a status (Late, Waiting), and a count (2, 3, 6, 0).

Section	Status	Count
Receipts	Late	2
Delivery Orders	Waiting	3
Delivery Orders	Late	6
Manufacturing	Waiting	3
Manufacturing	Late	3
PoS Orders	-	0

5.1 Operations

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

Inventory						
Dashboard Operations Inventory Control Schedulers Reports Configuration						
Stock Operations						
Waiting Availability or Ready Search...						
CREATE IMPORT 1-8 / 8						
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

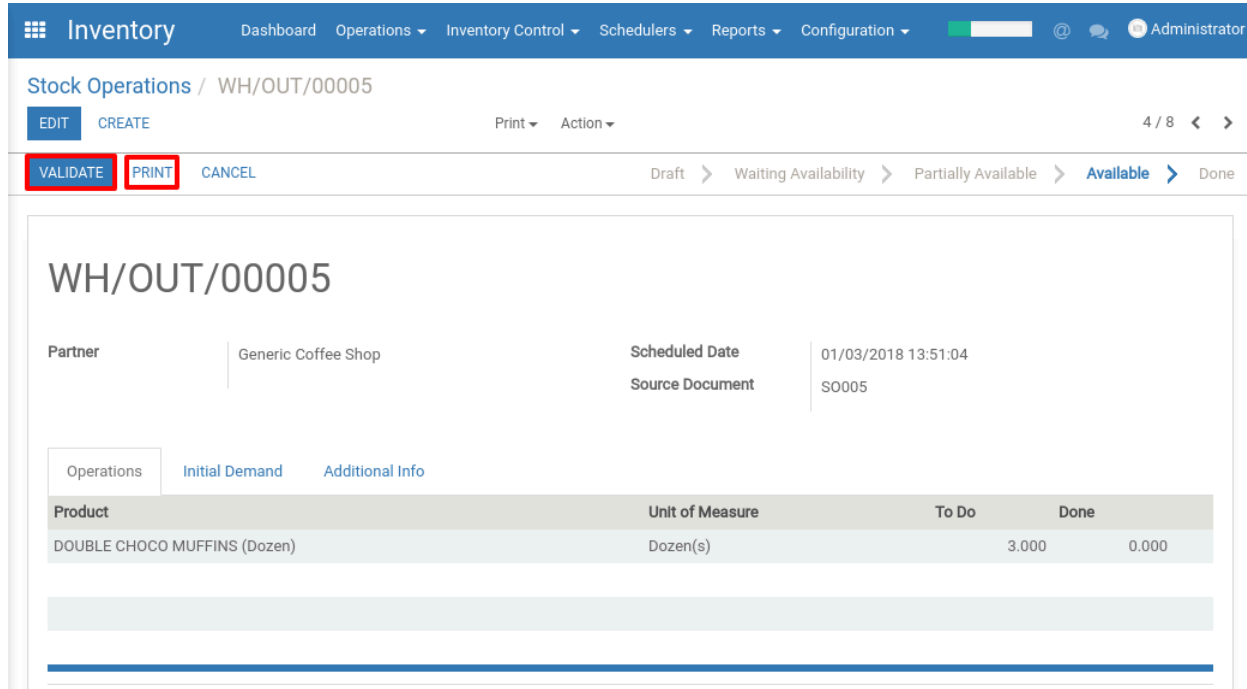
5.1.1 Click Stock Reference Number

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

Inventory						
Dashboard Operations Inventory Control Schedulers Reports Configuration						
Stock Operations						
Waiting Availability or Ready Search...						
CREATE IMPORT 1-8 / 8						
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.



Inventory Dashboard Operations Inventory Control Schedulers Reports Configuration Administrator

Stock Operations / WH/OUT/00005

EDIT CREATE Print Action 4 / 8 < >

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	Unit of Measure	To Do	Done
DOUBLE CHOCO MUFFINS (Dozen)	Dozen(s)	3.000	0.000

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

Administrator

Products

Products

Search...

1-40 / 234

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

AMERICANO

Price: 0.00Php

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)

BERRY WHIPPED CREAM FROSTING

Price: 0.00Php


bittersweet chocolate chenned

BLUEBERRY CHEESECAKE (Slice)

BLUEBERRY CHEESECAKE (Whole)

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												
<div>SAVE DISCARD</div> <div>UPDATE QTY ON HAND</div>												
 <div>Product Name</div> <div>Can be Sold</div> <div>Can be Purchased</div>				<div>Active</div> <div>Traceability</div> <div>On Hand</div> <div>Reordering Ru...</div> <div>Forecasted</div> <div>Bill of Materials</div> <div>Manufacturing</div> <div>Purchases</div>								
General Information				Inventory				Sales Invoicing Notes				
Product Type				Stockable Product				Sale Price				
Internal Reference								Cost				
Barcode								Unit of Measure				
Internal Category				All				Purchase Unit of Measure				
								Control Purchase Bills				
								<div>On ordered quantities</div> <div>On received quantities</div>				

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

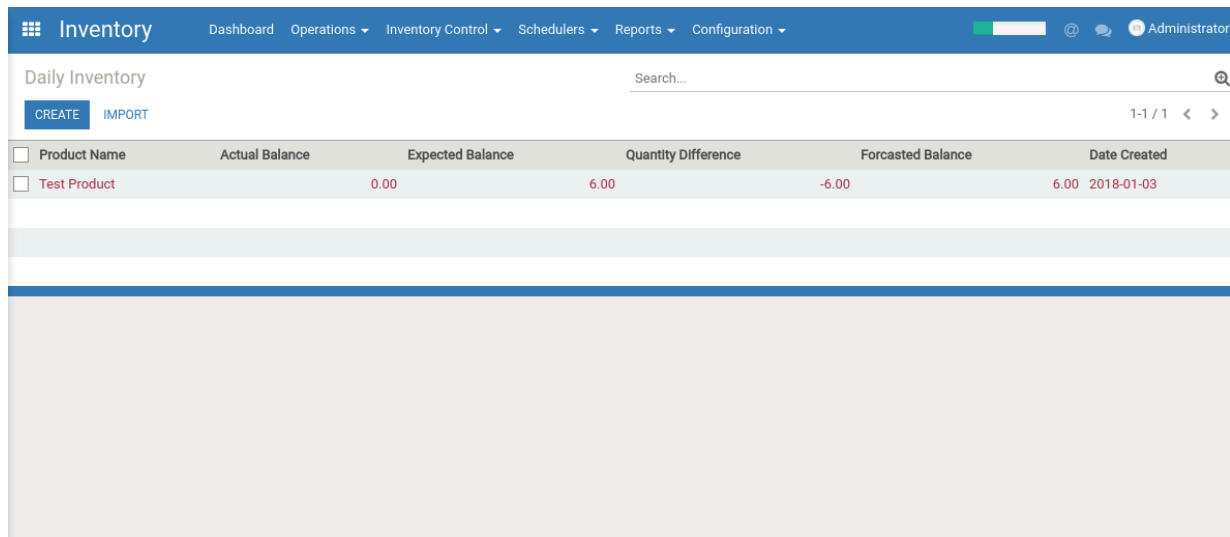
- Upload product image by clicking the camera icon.
Uploaded image should display the preview after the successful upload.
- Enter **Product Name**.
- Choose option value whether the item is **Can be Sold** or **Can be Purchased**.
- **General Information** tab. This is the default tab on create product 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.



The screenshot shows the Odoo 'Inventory' app interface. The top navigation bar includes 'Inventory', 'Dashboard', 'Operations', 'Inventory Control', 'Schedulers', 'Reports', and 'Configuration'. Below the navigation bar, the 'Daily Inventory' page is displayed with a search bar and 'CREATE' and 'IMPORT' buttons. A table lists inventory details for 'Test Product'.

<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.

5.2.3.1 Create New Product Variants

Inventory

Dashboard
Operations
Inventory Control
Schedulers
Reports
Configuration

Product Variants / New

SAVE

DISCARD

Product Name

Product Name

Can be Sold

Can be Purchased

General Information

Inventory

Sales

Invoicing

Notes

Product Type

Consumable

Sale Price

0.00

Internal Reference

Cost

0.00

Barcode

Unit of Measure

Unit(s)

Internal Category

All

Purchase Unit of Measure

Unit(s)

Control Purchase Bills

On ordered quantities

On received quantities

Active

Traceability

Bill of Materials

Manufacturing

Sales

- 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.

Inventory				
Dashboard Operations Inventory Control Schedulers Reports Configuration				
Administrator				
Reordering Rules				
Search...				
1-8 / 8				
CREATE	IMPORT			
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	[MISC] Test Product	Unit(s)	5.000	10.0

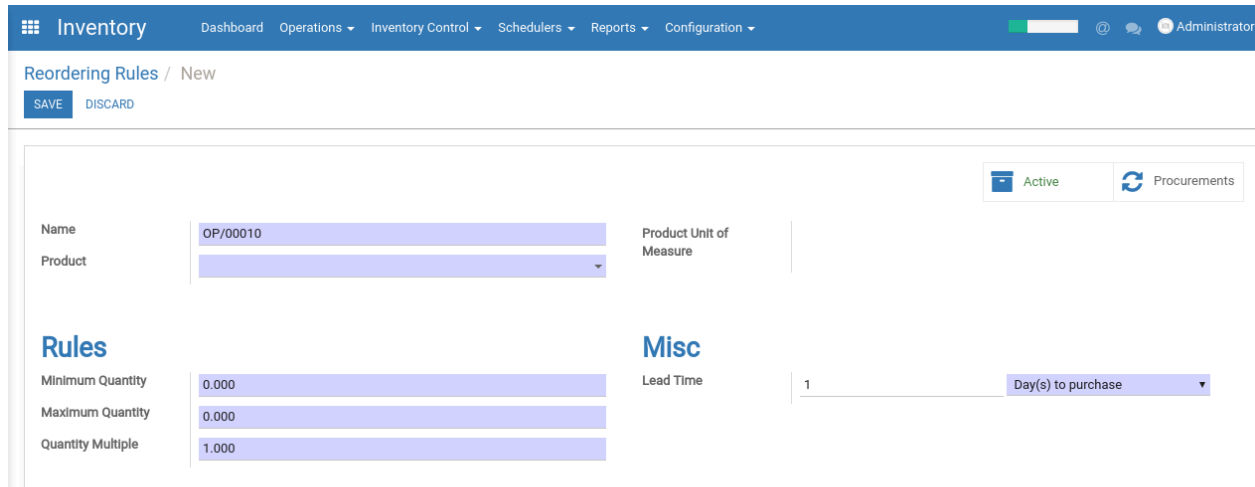
Click the **Reordering Rules Details** it will display the product details where the minimum and maximum quantity are set by the admin or manager to indicate that the stock limit.

Inventory				
Dashboard Operations Inventory Control Schedulers Reports Configuration				
Administrator				
Reordering Rules / New				
SAVE DISCARD				
<div> <div>Active</div> <div>Procurements</div> </div>				
Name	OP/00010		Product Unit of Measure	
Product				
Rules		Misc		
Minimum Quantity	0.000		Lead Time	1
Maximum Quantity	0.000			Day(s) to purchase
Quantity Multiple	1.000			

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.



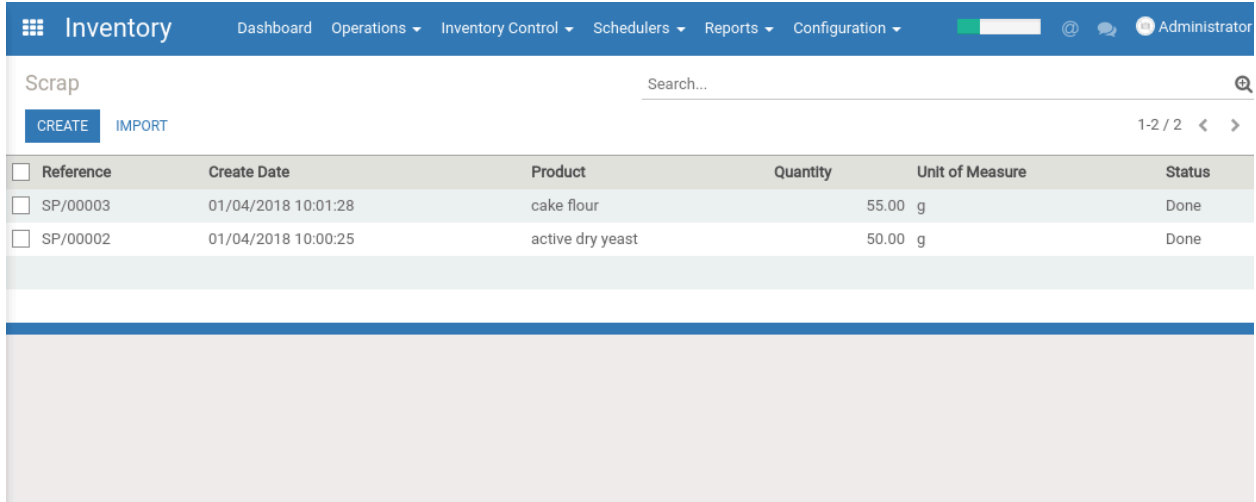
User will be asked to enter or choose the following fields.

- 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.

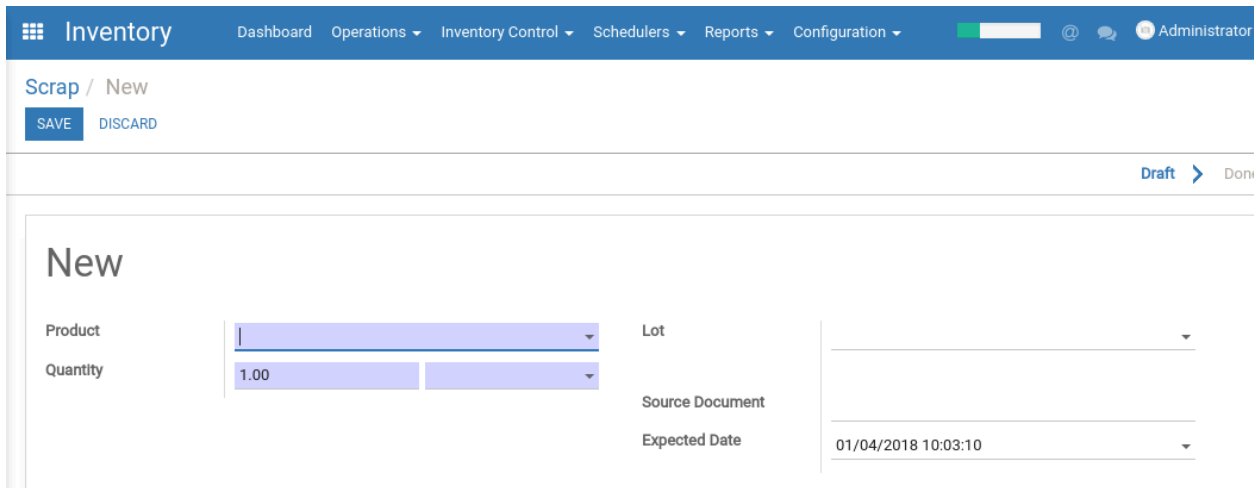


The screenshot shows the Odoo Inventory application with the 'Scrap' menu item selected. The page displays a table of scrap transactions. The table has columns for Reference, Create Date, Product, Quantity, Unit of Measure, and Status. There are two entries in the table: one for 'cake flour' and one for 'active dry yeast'. Both entries have a status of 'Done'.

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.



The screenshot shows the Odoo Inventory application with the 'Create Scrap' page. The page has a header with 'Scrap / New' and buttons for 'SAVE' and 'DISCARD'. Below the header, there is a form with fields for Product, Quantity, Lot, Source Document, and Expected Date. The 'Product' field is a dropdown menu, and the 'Quantity' field is a text input with a value of '1.00'. The 'Lot' field is a dropdown menu. The 'Source Document' field is a text input. The 'Expected Date' field is a date picker with a value of '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

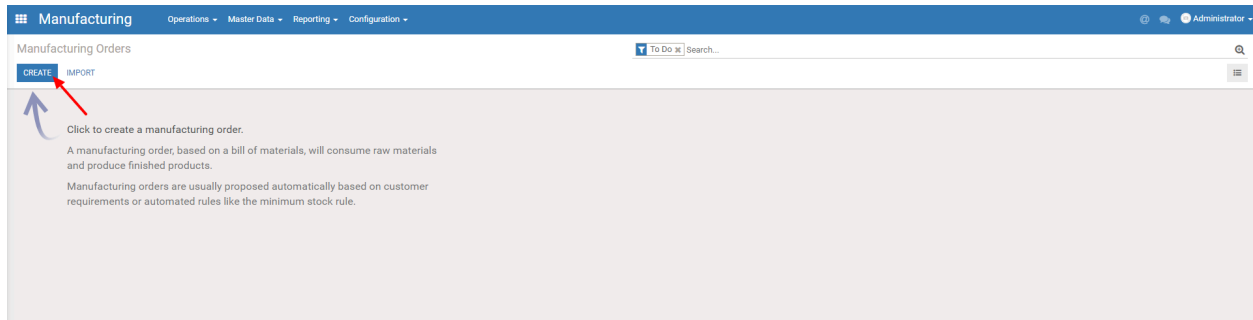
Click the **Stock Moves** submenu option under the Reports menu. Page will display the stock move of each products in the system in table list form.

Inventory							
Dashboard Operations Inventory Control Schedulers Reports Configuration							
Administrator							
Stock Moves							
Ready or To Do Search...							
1-6 / 6							
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.

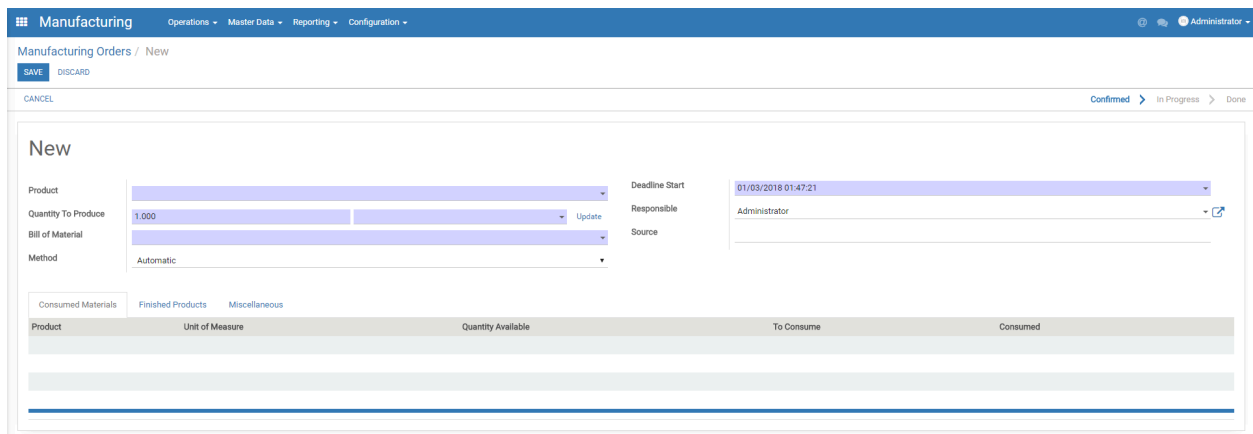
Manufacturing Order submenu page is the default page after clicking the Manufacturing menu. It's also display all the manufacturing orders list on the table.



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.



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 Operations Master Data Reporting Configuration Administrator

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
 Quantity To Produce: 1.000 wh (12 Slices) Update
 Bill of Material: BERRY SWIRL CHEESECAKE
 Method: Automatic

Deadline Start: 01/03/2018 03:10:54
 Responsible Source: Administrator

Product	Unit of Measure	Quantity Available	To Consume	Consumed
butter	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 Operations Master Data Reporting Configuration Administrator

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
 Quantity To Produce: 1.000 wh (12 Slices) Update
 Bill of Material: BERRY SWIRL CHEESECAKE
 Method: Automatic

Deadline Start: 01/03/2018 03:10:54
 Responsible Source: Administrator

Product	Unit of Measure	Quantity Available	To Consume	Consumed
butter	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

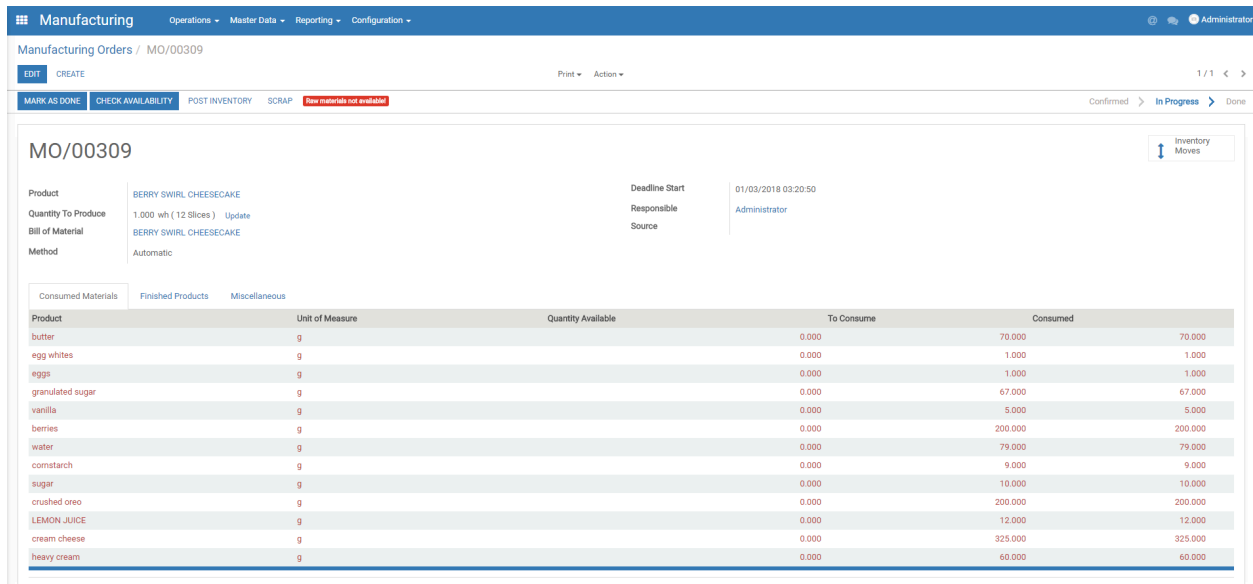
Product: BERRY SWIRL CHEESECAKE
 Quantity: 0.000 wh (12 Slices)

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 Order (MO) form for MO/00309. The form is titled "Manufacturing Orders / MO/00309" and includes a navigation bar with "Operations", "Master Data", "Reporting", and "Configuration". The form is divided into several sections: "Product" (BERRY SWIRL CHEESECAKE), "Quantity To Produce" (1,000 wh (12 Slices)), "Bill of Material" (BERRY SWIRL CHEESECAKE), and "Method" (Automatic). The "Deadline Start" is 01/03/2018 03:20:50, and the "Responsible" is Administrator. The form also includes a "Consumed Materials" table with columns for Product, Unit of Measure, Quantity Available, To Consume, and Consumed. The table lists various ingredients and their quantities.

Product	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.

Manufacturing						
Scrap			Search...			
CREATE IMPORT			1-2 / 2 < >			
<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.

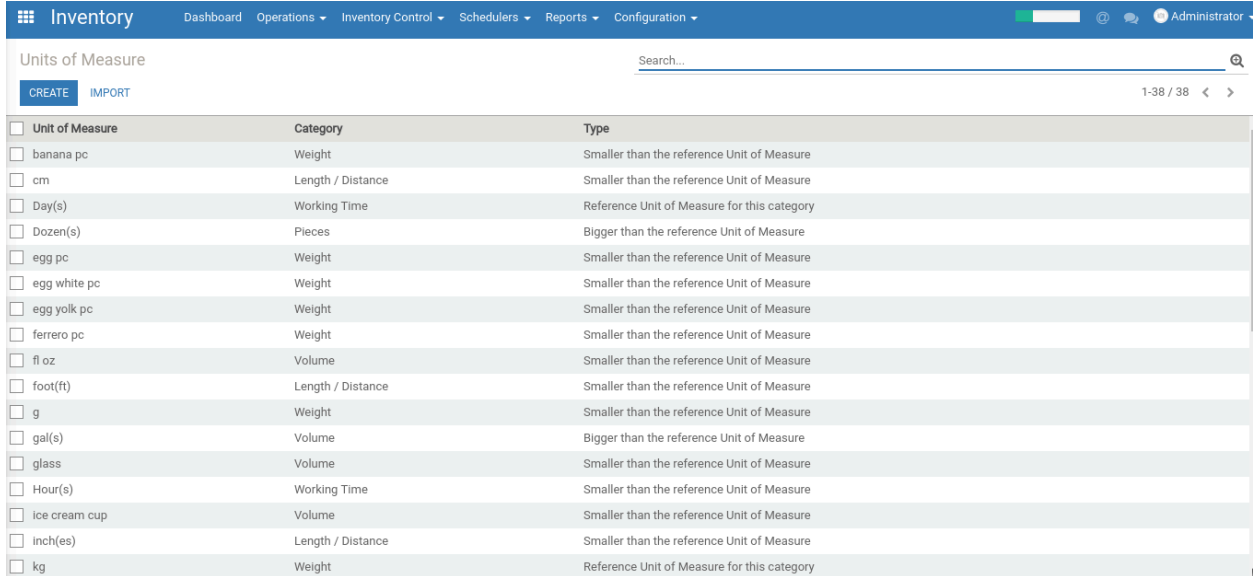
6.3.2 Attributes Values

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.

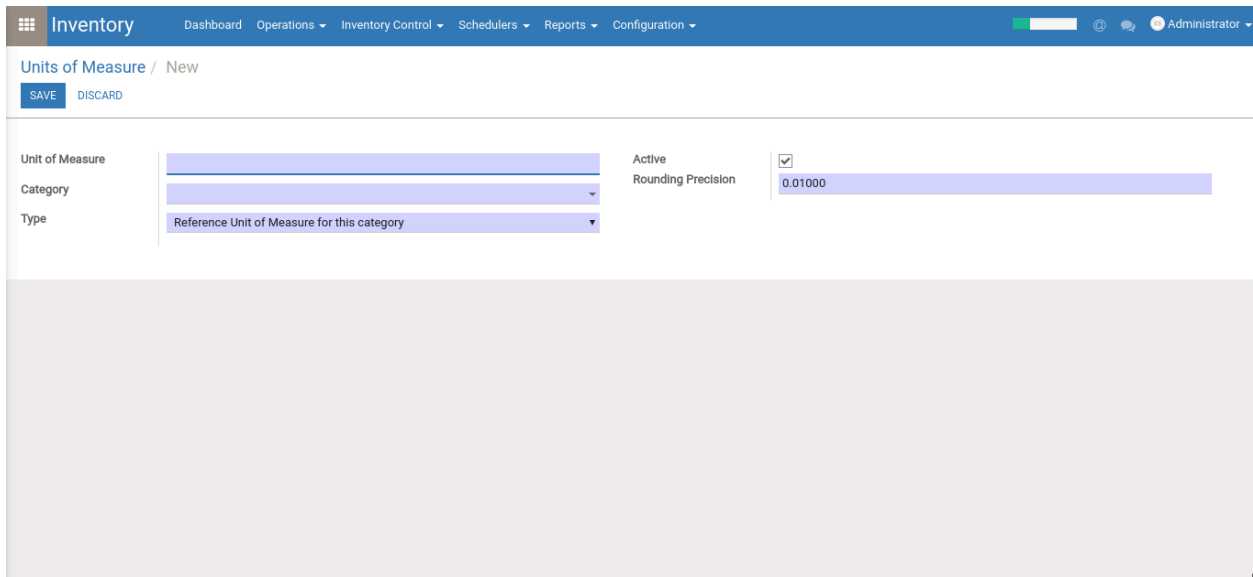
Page should look like the screen below.



Unit of Measure	Category	Type
<input type="checkbox"/> banana pc	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> cm	Length / Distance	Smaller than the reference Unit of Measure
<input type="checkbox"/> Day(s)	Working Time	Reference Unit of Measure for this category
<input type="checkbox"/> Dozen(s)	Pieces	Bigger than the reference Unit of Measure
<input type="checkbox"/> egg pc	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> egg white pc	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> egg yolk pc	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> ferrero pc	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> fl oz	Volume	Smaller than the reference Unit of Measure
<input type="checkbox"/> foot(ft)	Length / Distance	Smaller than the reference Unit of Measure
<input type="checkbox"/> g	Weight	Smaller than the reference Unit of Measure
<input type="checkbox"/> gal(s)	Volume	Bigger than the reference Unit of Measure
<input type="checkbox"/> glass	Volume	Smaller than the reference Unit of Measure
<input type="checkbox"/> Hour(s)	Working Time	Smaller than the reference Unit of Measure
<input type="checkbox"/> ice cream cup	Volume	Smaller than the reference Unit of Measure
<input type="checkbox"/> inch(es)	Length / Distance	Smaller than the reference Unit of Measure
<input type="checkbox"/> 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	<input type="text" value="0.01000"/>
Type	<input type="text" value="Reference Unit of Measure for this category"/>		

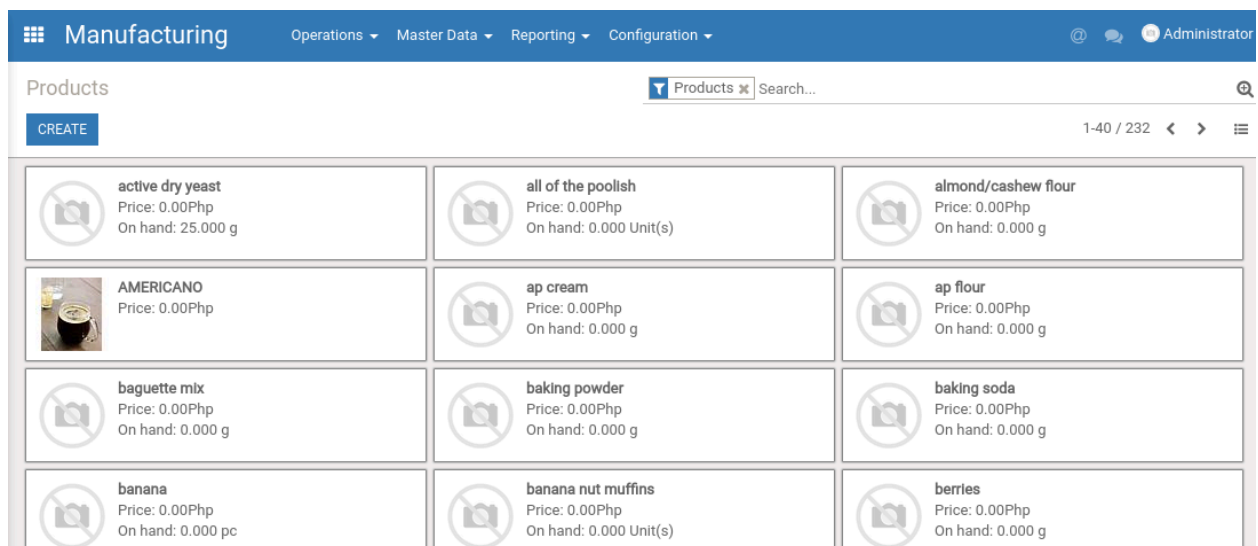
User will be asked to choose the following fields.













- 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

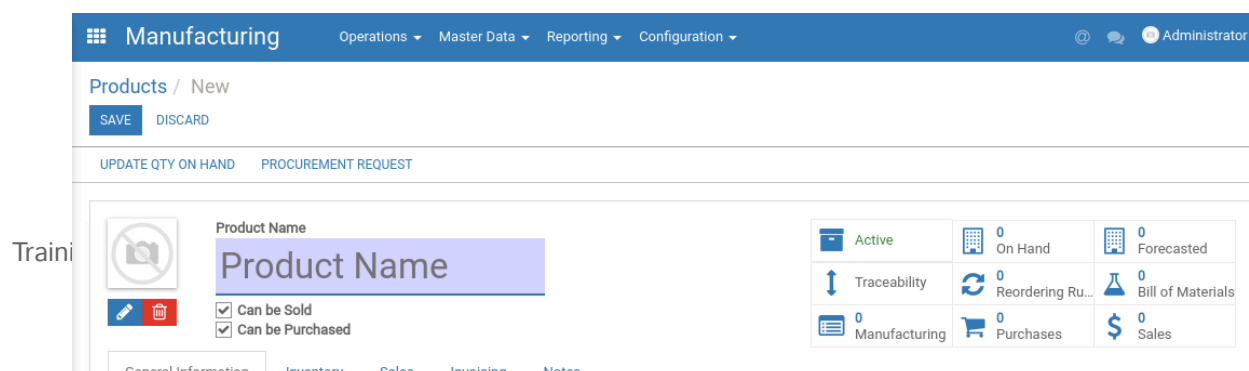
Click the **Products** submenu under the Master Data menu. Page will display the List of products that are available.



Products		
 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.



Products / New

SAVE DISCARD

UPDATE QTY ON HAND PROCUREMENT REQUEST

Product Name

Product Name

☒ Can be Sold
☒ Can be Purchased

<input checked="" type="checkbox"/> Active	0 On Hand	0 Forecasted
<input checked="" type="checkbox"/> Traceability	0 Reordering Ru...	0 Bill of Materials
0 Manufacturing	0 Purchases	0 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.

Manufacturing			
Bill of Materials		Search...	
CREATE IMPORT		1-50 / 50 < >	
<input type="checkbox"/> Product ▲	Reference	Quantity	Product Unit of Measure
<input type="checkbox"/> banana nut muffins		1.00	12 pc
<input type="checkbox"/> BERRY SWIRL CHEESECAKE		1.00	wh (12 Slices)
<input type="checkbox"/> BLUEBERRY CHEESECAKE (Slice)		10.00	sl
<input type="checkbox"/> bread roll w/o cheese		1.00	Unit(s)
<input type="checkbox"/> breakfast sandwich pizza	mozzarella	1.00	Unit(s)
<input type="checkbox"/> breakfast sandwich pizza	cheddar	1.00	Unit(s)
<input type="checkbox"/> CAFE LATTE		1.00	1 glass
<input type="checkbox"/> CARROT CAKE (Slice)		14.00	sl
<input type="checkbox"/> CARROT CAKE (Whole)	(ap flour and pecans)	1.00	wh (14 Slices)
<input type="checkbox"/> 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.

Manufacturing					
Bill of Materials / New					
SAVE DISCARD					
		<div> <div>Active</div> </div>			
Product	<input type="text"/>	Reference	<input type="text"/>		
Quantity	<input type="text" value="1.00"/> <input type="text" value="Unit(s)"/>	BoM Type	<input checked="" type="radio"/> Manufacture this product <input type="radio"/> Ship this product as a set of components (kit)		
<div> <div>Components</div> <div>Miscellaneous</div> </div>					
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.

Manufacturing


Operations ▾ Master Data ▾ Reporting ▾ Configuration ▾

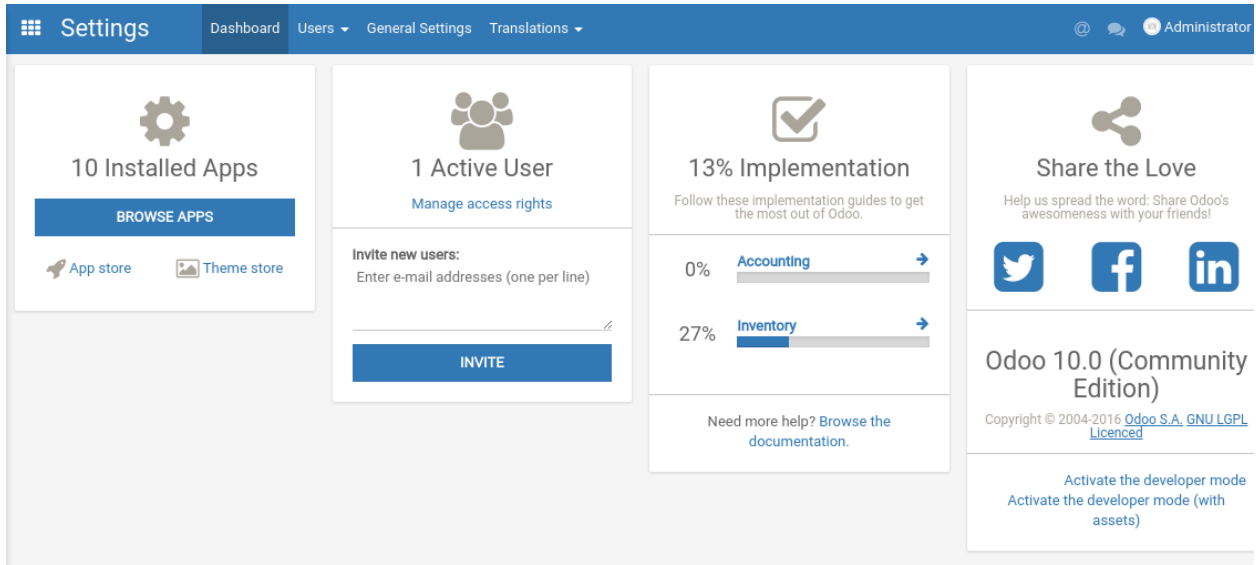
MEASURES ▾

Search...

- Total				
- Waiting				
+ MIMI'S CHOCOLATE CAKE (Slice)	+ CARROT CAKE (Slice)	+ TRES LECHES Cake (Slice)		
Count	Count	Count	Count	
- Total	1	1	1	3
+ 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.

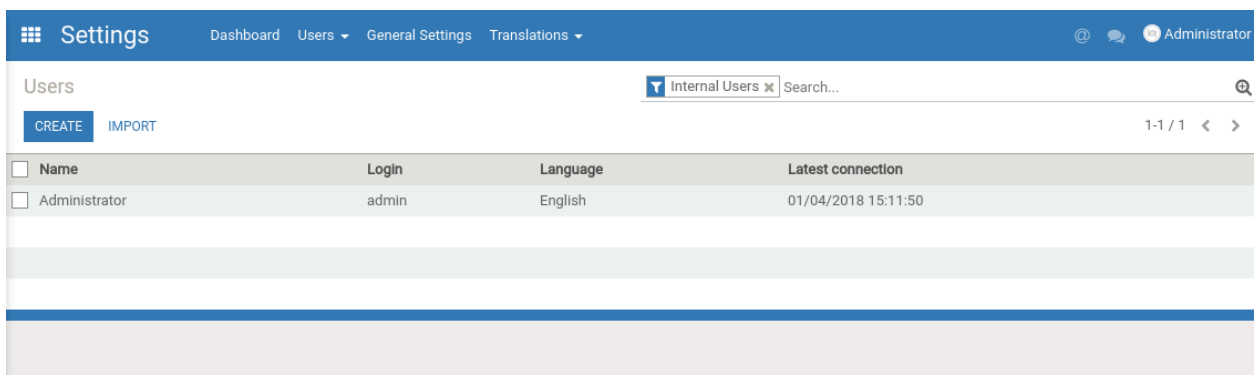


The dashboard shows the following information:

- 10 Installed Apps**: Includes a "BROWSE APPS" button and links to the "App store" and "Theme store".
- 1 Active User**: Includes a "Manage access rights" link and an "Invite new users" section with a text input for email addresses and an "INVITE" button.
- 13% Implementation**: Shows progress bars for "Accounting" (0%) and "Inventory" (27%), with links to documentation.
- Share the Love**: Includes social media icons for Twitter, Facebook, and LinkedIn, and a link to "Activate the developer mode".

7.1 Create User Account

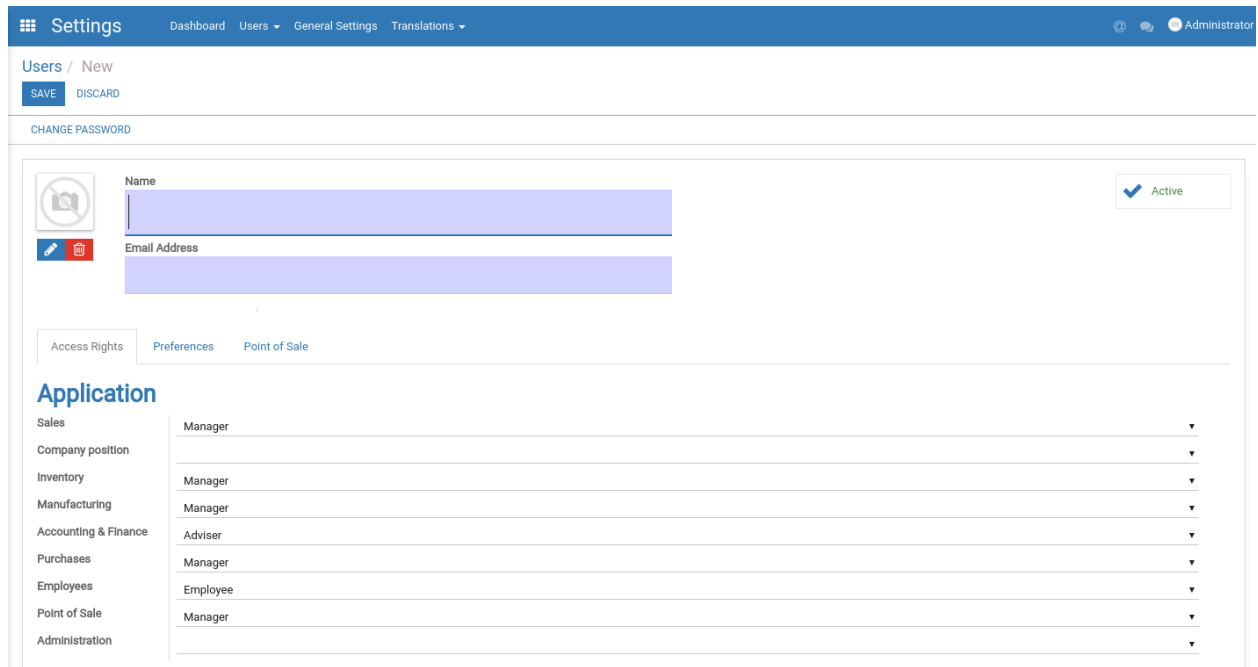
Click the **Users** submenu under the Users menu. It should display a list of users of the system.



The Users list shows the following data:

<input type="checkbox"/>	Name	Login	Language	Latest connection
<input type="checkbox"/>	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.



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

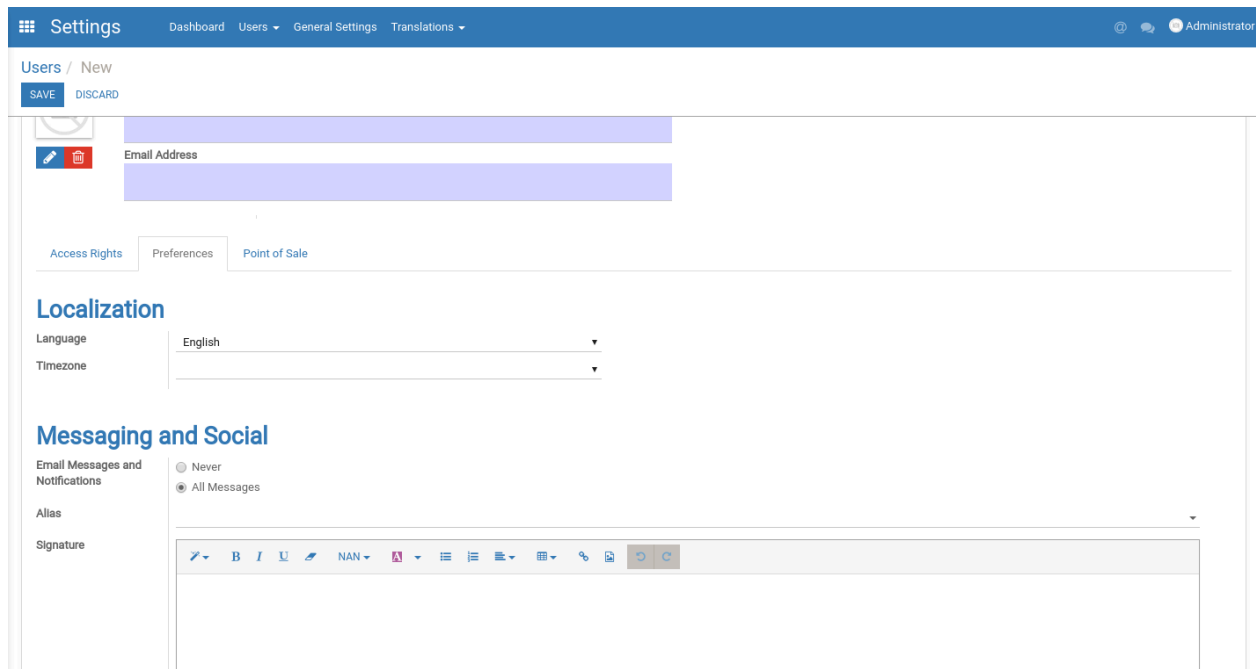
Note: Change password option is a requirement. Admin is required to add password for created account.

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.



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**.

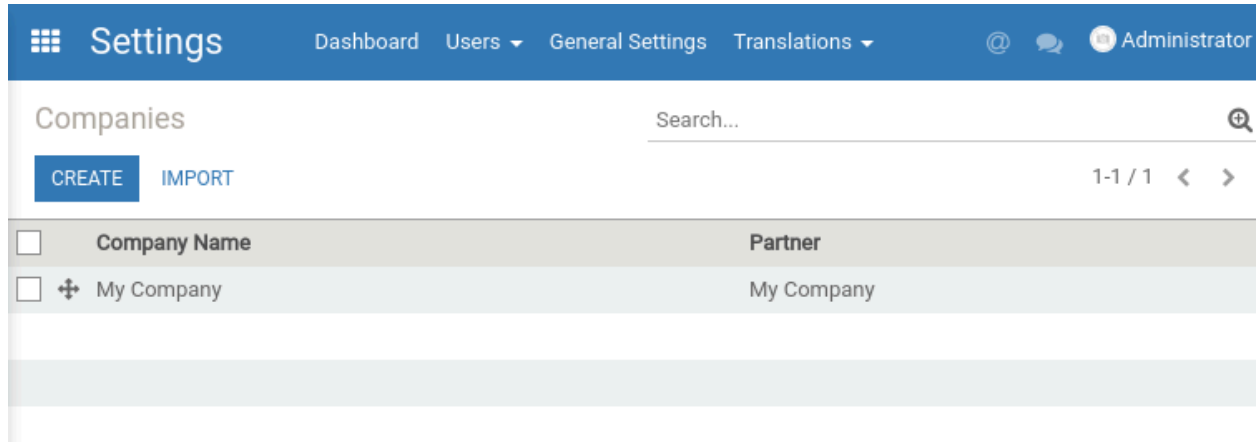
On Messaging and Social label enter or choose the following option:

- 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.



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.

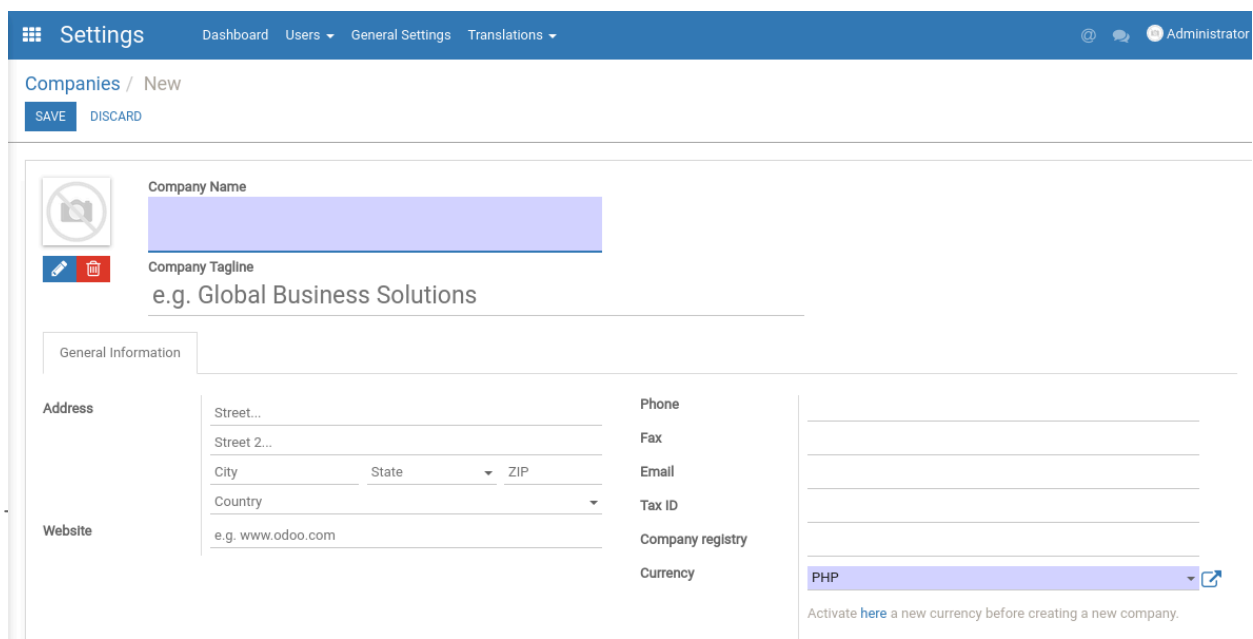
Website Label

- Enter Company Website.

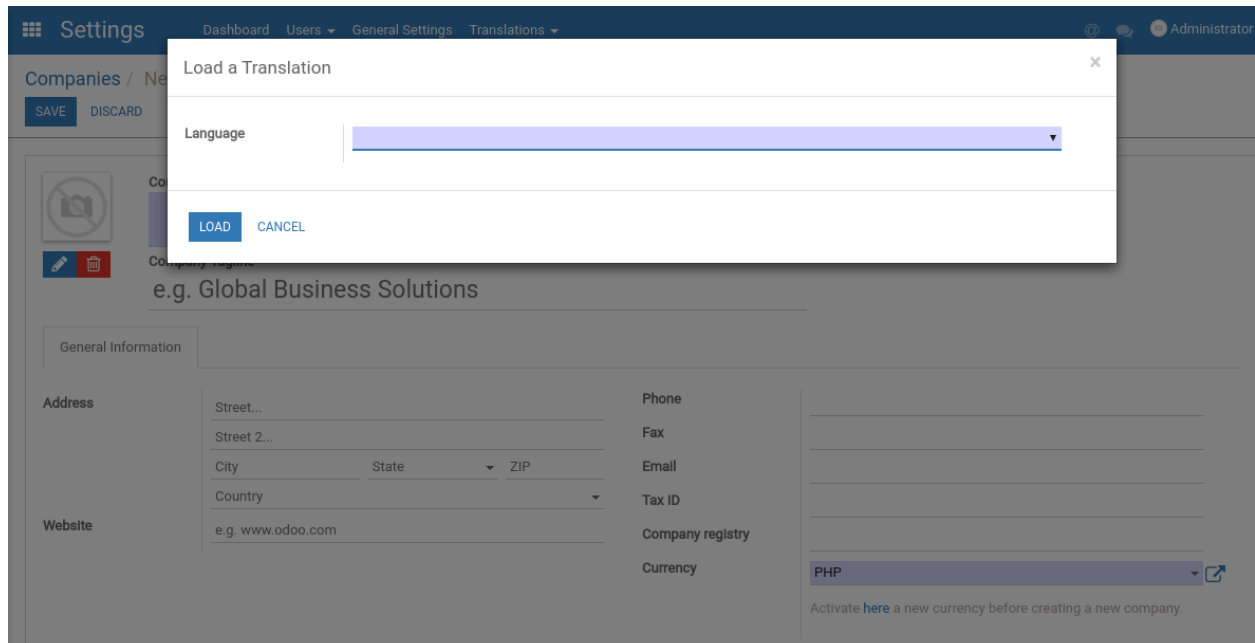
Click the **Save** button to save the created new user and click the **Discard** otherwise.

7.3 Load Translation

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



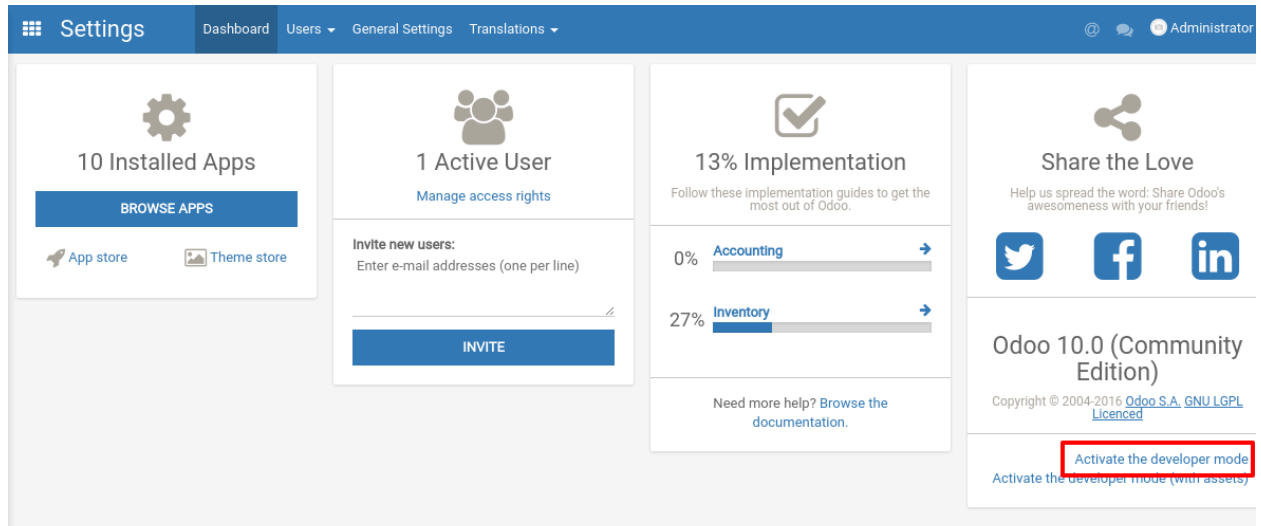
The screenshot shows the 'New Company' form in the Odoo application. The top navigation bar includes 'Settings', 'Dashboard', 'Users', 'General Settings', and 'Translations'. The breadcrumb trail is 'Companies / New'. Below the breadcrumb are 'SAVE' and 'DISCARD' buttons. The form itself has a 'Company Name' field with a placeholder image icon, a 'Company Tagline' field with the example 'e.g. Global Business Solutions', and a 'General Information' tab. The 'General Information' tab contains several fields: 'Address' (Street..., Street 2..., City, State, ZIP, Country), 'Phone', 'Fax', 'Email', 'Tax ID', 'Company registry', 'Currency' (set to 'PHP'), and 'Website' (e.g. www.odoo.com). At the bottom, there is a note: 'Activate [here](#) a new currency before creating a new company.'



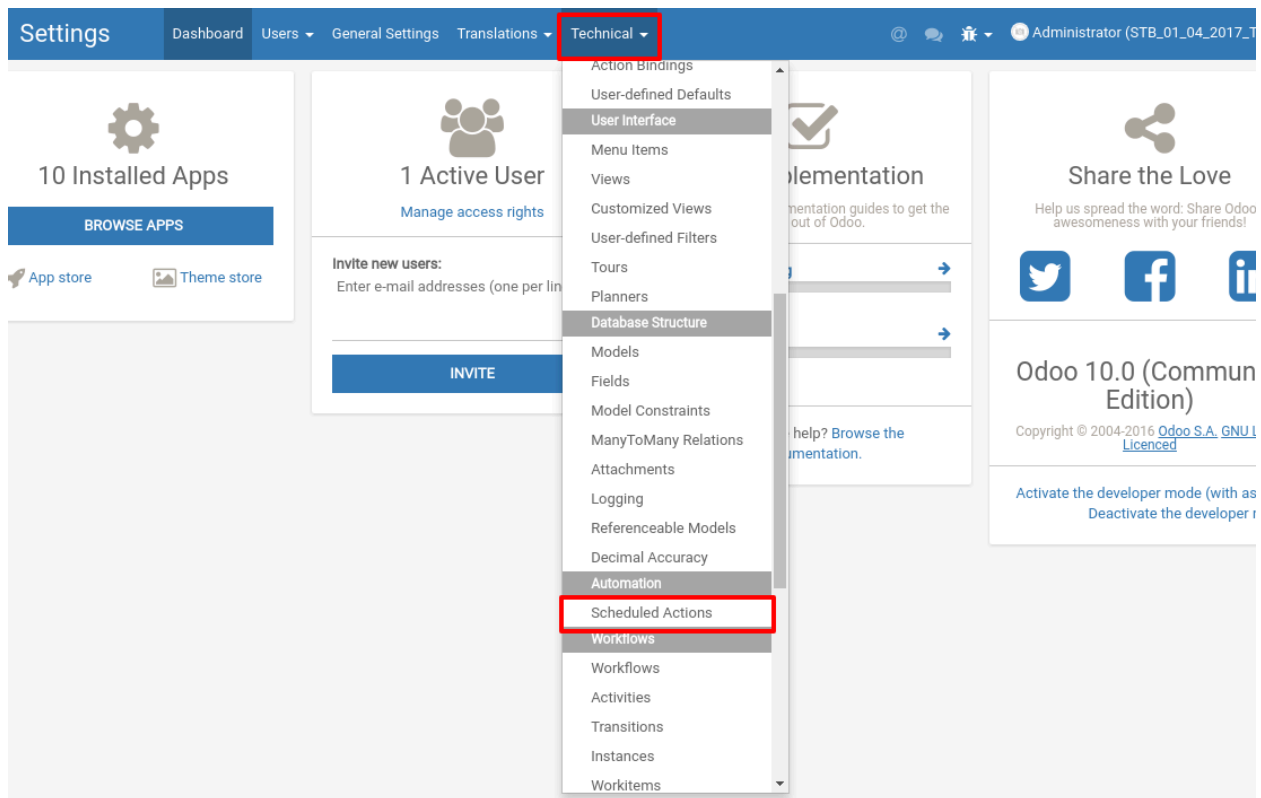
Click the **Language** option. A language list option will be displayed the user may select from.
Click the **Load** button to save the changes and click **Cancel** button otherwise.

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.



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



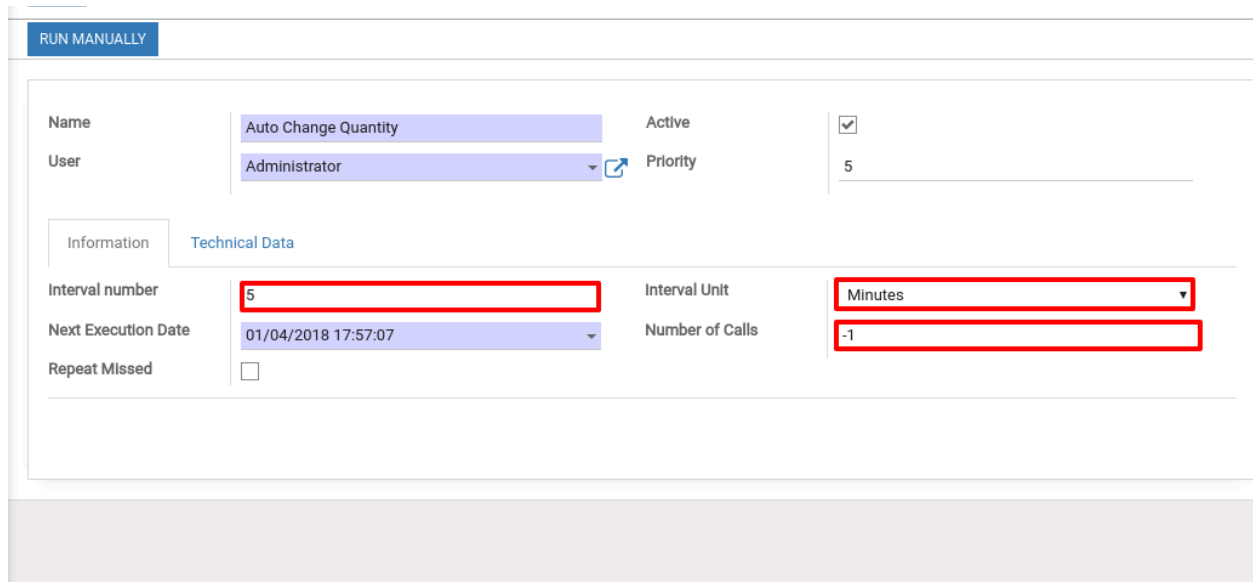
Click the **Create** button.

Settings						
Dashboard Users General Settings Translations Technical						
Administrator (STB_01_04_2017_TRISH)						
Scheduled Actions						
All Search...						
CREATE IMPORT						
1-11 / 11						
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						
Administrator (STB_01_04_2017_TRISH)						
Scheduled Actions / New						
SAVE DISCARD						
RUN MANUALLY						
Name				Active	<input checked="" type="checkbox"/>	
User	Administrator			Priority	5	
Information 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: ☒

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

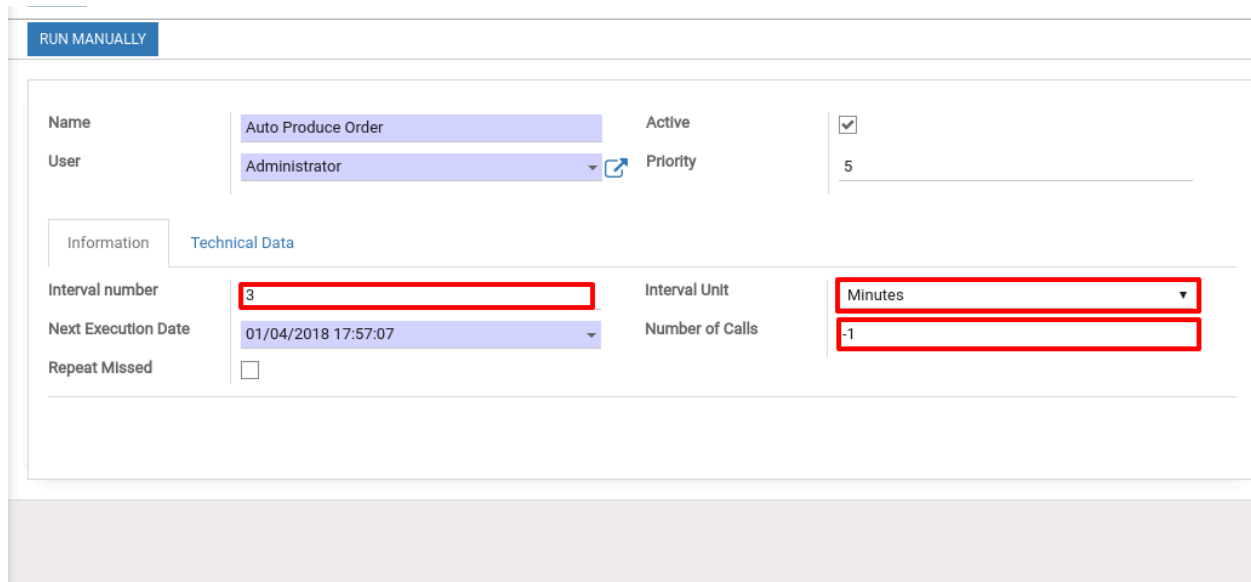
Repeat Missed: ☐

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: ☒ Priority: 5

User: Administrator [Link](#)

Information **Technical Data**

Interval number: 3 Interval Unit: Minutes

Next Execution Date: 01/04/2018 17:57:07 Number of Calls: -1

Repeat Missed: ☐

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 --