

# Odoo Functional

## Course outline

### **Module 1: Introduction to Odoo**

Module 1: Introduction to Odoo module for Odoo Functional course provides an overview of the Odoo platform and its features. It covers the basics of Odoo, such as its architecture, modules, and data models. It also introduces the Odoo functional course and explains how to use the Odoo functional course to become an Odoo expert.

#### ***Lessons***

- Overview of Odoo
- Installing and Configuring Odoo
- Understanding the Odoo Architecture
- Working with Odoo Apps
- Customizing Odoo
- Working with Odoo Views
- Working with Odoo Models
- Working with Odoo Reports
- Working with Odoo Security
- . Working with Odoo Workflows

#### **After completing this module, students will be able to:**

- Understand the basic concepts of Odoo and its architecture.
- Configure and customize Odoo modules to meet specific business needs.
- Create and manage databases in Odoo.
- Utilize Odoo's features to automate business processes.

### **Module 2: Setting up an Odoo Environment**

Module 2 of the Odoo Functional course provides an introduction to setting up an Odoo environment. It covers topics such as installing Odoo, configuring the database, creating users, and setting up the Odoo server. It also provides an overview of the Odoo architecture and the different components of the system. Finally, it provides an introduction to the Odoo development environment and how to use it to customize Odoo.

#### ***Lessons***

- Overview of Odoo Installation

- Installing Odoo on Windows
- Installing Odoo on Linux
- Configuring Odoo
- Setting up a Database
- Installing Modules
- Troubleshooting Installation Issues
- Setting up a Development Environment
- Setting up a Production Environment
- . Security Considerations for Odoo Environments

### **After completing this module, students will be able to:**

- Understand the different components of an Odoo environment and how to install and configure them.
- Be able to create and manage databases in Odoo.
- Know how to configure and customize Odoo for specific business needs.
- Be able to troubleshoot and debug Odoo errors.

## **Module 3: Understanding Odoo Architecture**

Module 3 of the Odoo Functional course provides an overview of the Odoo architecture, including the different components of the system, the database structure, and the application server. It also covers the different types of modules available, how to install and configure them, and how to customize them to meet specific business needs. Finally, it explains how to use the Odoo API to integrate with other systems.

### ***Lessons***

- Overview of Odoo Architecture
- Exploring the Odoo Framework
- Understanding the Odoo Database Structure
- Working with the Odoo ORM
- Exploring the Odoo Views
- Working with the Odoo Controllers
- Understanding the Odoo Security Model
- Exploring the Odoo Workflows
- Working with the Odoo Reports
- . Understanding the Odoo Web Services

### **After completing this module, students will be able to:**

- Understand the different components of the Odoo architecture and how they interact with each other.
- Identify the different types of modules and how they are used in Odoo.
- Develop an understanding of the different types of data models and how they are used in Odoo.
- Learn how to customize and extend the Odoo architecture to meet specific business needs.

## Module 4: Working with Odoo Apps

Module 4 of the Odoo Functional course focuses on working with Odoo Apps. It covers topics such as installing and configuring Odoo Apps, customizing existing Apps, and creating new Apps. It also covers topics such as creating custom views, menus, and reports. This module provides a comprehensive overview of the Odoo App development process and provides the necessary skills to create and customize Odoo Apps.

### **Lessons**

- Introduction to Odoo Apps
- Installing and Configuring Odoo Apps
- Customizing Odoo Apps
- Troubleshooting Odoo Apps
- Integrating Third-Party Apps with Odoo
- Creating Custom Apps in Odoo
- Security and Performance Considerations for Odoo Apps
- Best Practices for Working with Odoo Apps
- Deploying and Managing Odoo Apps in Production
- . Automating Odoo App Development and Deployment

### **After completing this module, students will be able to:**

- Understand the different types of Odoo Apps and their purpose.
- Install and configure Odoo Apps.
- Create custom Odoo Apps.
- Troubleshoot and debug Odoo Apps.

## Module 5: Customizing Odoo

Module 5 of the Odoo Functional course focuses on customizing Odoo modules. It covers topics such as creating custom views, customizing existing views, and creating custom reports. It also covers how to use the Odoo Studio to customize existing modules and create new ones. Finally, it covers how to use the Odoo API to extend the functionality of existing modules.

### **Lessons**

- Introduction to Customizing Odoo Modules
- Understanding the Odoo Architecture
- Working with Views and Menus
- Working with Models and Fields
- Working with Controllers and Wizards
- Working with Reports and QWeb
- Working with Security and Access Rights
- Working with Automated Actions
- Working with Web Services
- . Working with Workflows and Business Processes

## **After completing this module, students will be able to:**

- Understand the Odoo architecture and how to customize Odoo modules.
- Develop custom Odoo modules to meet specific business requirements.
- Create custom views, menus, and reports in Odoo.
- Integrate Odoo with external systems and services.

## **Module 6: Working with Odoo Views**

Module 6 of the Odoo Functional course covers the basics of working with Odoo Views. It covers topics such as creating and customizing views, using the view designer, and creating custom views. It also covers advanced topics such as creating dynamic views and using the view inheritance system. This module is designed to give users a comprehensive understanding of how to work with Odoo Views.

### ***Lessons***

- Introduction to Odoo Views
- Creating and Modifying Views
- Working with Tree and Form Views
- Working with Kanban and Graph Views
- Working with Calendar and Gantt Views
- Working with Search and Filters
- Working with QWeb Reports
- Working with Dashboards
- Working with Action Menus
- . Working with Access Rights

## **After completing this module, students will be able to:**

- Understand the different types of views available in Odoo and how to create them.
- Be able to customize existing views and create new views.
- Know how to use the view designer to create custom views.
- Be able to use the view designer to create complex views with multiple fields and filters.

## **Module 7: Working with Odoo Reports**

Module 7 of the Odoo Functional course focuses on working with Odoo Reports. It covers topics such as creating and customizing reports, using the report designer, and understanding the report structure. It also covers how to use the report wizard to create custom reports and how to use the report designer to customize existing reports. Finally, it covers how to use the report structure to create complex reports.

### ***Lessons***

- Overview of Odoo Reports
- Creating Reports in Odoo
- Customizing Reports in Odoo
- Working with Report Templates in Odoo

- Generating Reports in Odoo
- Exporting Reports in Odoo
- Scheduling Reports in Odoo
- Troubleshooting Reports in Odoo
- Best Practices for Working with Reports in Odoo
- . Advanced Report Customization in Odoo

### **After completing this module, students will be able to:**

- Understand the different types of reports available in Odoo and how to create them.
- Learn how to customize existing reports and create new ones.
- Be able to use the reporting tools to analyze data and generate insights.
- Be able to use the reporting tools to create dashboards and visualizations.

## **Module 8: Working with Odoo Workflows**

Module 8 of the Odoo Functional course covers the basics of working with Odoo Workflows. It covers topics such as creating and managing workflows, understanding the different types of workflows, and using the workflow editor to create and modify workflows. Additionally, the module covers how to use the workflow engine to automate business processes and how to use the workflow API to integrate workflows with other Odoo applications.

### ***Lessons***

- Understanding Odoo Workflows
- Creating and Managing Workflows
- Using Workflows to Automate Business Processes
- Troubleshooting Workflow Issues
- Advanced Workflow Concepts
- Integrating Workflows with Other Modules
- Best Practices for Working with Workflows
- Creating Custom Workflows
- Optimizing Workflows for Performance
- . Security Considerations for Workflows

### **After completing this module, students will be able to:**

- Understand the concept of Odoo Workflows and how to create and manage them.
- Create and configure workflow activities, transitions, and signals.
- Create and manage workflow instances and track their progress.
- Utilize the Odoo Workflows API to automate business processes.

## **Module 9: Working with Odoo Security**

Module 9 of the Odoo Functional course focuses on Odoo Security. It covers topics such as user access rights, security groups, and data encryption. It also provides an overview of the security features available

in Odoo and how to configure them. This module is designed to help users understand the importance of security in Odoo and how to ensure their data is secure.

## ***Lessons***

- Overview of Odoo Security Module
- Understanding Access Rights and Groups
- Setting up User Access Rights
- Setting up Record Rules
- Setting up Security Groups
- Setting up Security Rules
- Setting up Security Policies
- Setting up Security Audits
- Troubleshooting Security Issues
- . Best Practices for Odoo Security

### **After completing this module, students will be able to:**

- Understand the different security groups and access rights in Odoo
- Configure user access rights and security groups in Odoo
- Create and manage security rules in Odoo
- Troubleshoot security issues in Odoo

## **Module 10: Working with Odoo Accounting**

Module 10 of the Odoo Functional course covers the basics of working with Odoo Accounting. It covers topics such as setting up accounts, creating invoices, managing taxes, and generating financial reports. It also covers how to use the Odoo Accounting module to manage your business finances.

## ***Lessons***

- Overview of Odoo Accounting Module
- Setting up Chart of Accounts
- Configuring Taxes
- Creating and Managing Journals
- Generating and Analyzing Financial Reports
- Managing Bank and Cash Transactions
- Reconciling Bank Statements
- Setting up Multi-Currency Accounting
- Managing Budgets and Cost Centers
- . Automating Accounting Processes with Workflows

### **After completing this module, students will be able to:**

- Understand the fundamentals of Odoo Accounting module and its features.
- Set up and configure the Odoo Accounting module.

- Create and manage financial documents such as invoices, payments, and journals.
- Analyze financial data and generate reports.

## **Module 11: Working with Odoo Human Resources**

Module 11 of the Odoo Functional course focuses on working with the Odoo Human Resources module. This module covers topics such as setting up employee records, managing payroll, tracking employee attendance, and creating reports. It also covers how to use the Odoo Human Resources module to manage employee benefits, such as vacation and sick leave.

### ***Lessons***

- Overview of the Odoo Human Resources Module
- Setting up Employee Records
- Managing Employee Contracts
- Configuring Payroll Rules
- Generating Payroll Reports
- Managing Employee Leaves
- Tracking Employee Attendance
- Setting up Employee Appraisals
- Managing Employee Benefits
- . Configuring Employee Recruitment Processes

### **After completing this module, students will be able to:**

- Understand the different features and functionalities of the Odoo Human Resources module.
- Create and manage employee records, including personal information, job details, and payroll information.
- Set up and manage employee benefits, such as vacation and sick leave.
- Generate reports and analyze data related to employee performance and productivity.

## **Module 12: Working with Odoo Sales and Purchases**

Module 12 of the Odoo Functional course covers the basics of working with Odoo Sales and Purchases. It covers topics such as creating sales orders, invoices, and delivery orders, as well as setting up and managing purchase orders. It also covers how to use Odoo's inventory management system to track stock levels and manage stock movements. Finally, it covers how to use Odoo's reporting tools to analyze sales and purchase data.

### ***Lessons***

- Overview of the Odoo Sales and Purchases Module
- Setting up Sales and Purchases in Odoo
- Creating and Managing Sales Orders
- Creating and Managing Purchase Orders
- Managing Inventory and Stock Levels
- Configuring Taxes and Payment Terms

- Generating Reports and Analyzing Sales and Purchases Data
- Troubleshooting Common Issues with Sales and Purchases
- Integrating Odoo Sales and Purchases with Other Modules
- . Best Practices for Working with Odoo Sales and Purchases Module

**After completing this module, students will be able to:**

- Understand the different types of sales and purchase orders in Odoo.
- Create and manage sales and purchase orders in Odoo.
- Configure and customize Odoo sales and purchase orders.
- Analyze sales and purchase data in Odoo.

## **Module 13: Working with Odoo Manufacturing**

Module 13 of the Odoo Functional course covers the basics of working with Odoo Manufacturing. It covers topics such as setting up a manufacturing environment, creating bills of materials, setting up production orders, and managing inventory. It also covers topics such as quality control, cost analysis, and production planning.

### ***Lessons***

- Overview of Odoo Manufacturing Module
- Setting up Manufacturing Orders
- Configuring Manufacturing Routes
- Managing Bills of Materials
- Working with Work Orders
- Tracking Production with Quality Control
- Managing Scrap and Waste
- Generating Manufacturing Reports
- Integrating Manufacturing with Other Modules
- . Troubleshooting Manufacturing Issues

**After completing this module, students will be able to:**

- Understand the fundamentals of Odoo Manufacturing module and its features.
- Configure and customize the Odoo Manufacturing module to meet specific business needs.
- Create and manage Bills of Materials (BOMs) and Routings.
- Utilize the Odoo Manufacturing module to manage production orders, work orders, and quality control.

## **Module 14: Working with Odoo Website and eCommerce**

Module 14 of the Odoo Functional course covers the basics of working with Odoo Website and eCommerce. It covers topics such as creating and managing websites, setting up eCommerce stores, and managing orders and customers. It also covers how to customize the look and feel of the website, as well as how to integrate with payment gateways.



## **Lessons**

- Overview of Odoo Website and eCommerce Module
- Setting up a Website in Odoo
- Creating and Managing Pages in Odoo Website
- Adding and Managing Products in Odoo Website
- Configuring Payment Methods in Odoo Website
- Managing Orders and Invoices in Odoo Website
- Integrating Third-Party Services with Odoo Website
- Customizing the Look and Feel of Odoo Website
- Optimizing SEO for Odoo Website
- . Troubleshooting and Debugging Odoo Website Issues

### **After completing this module, students will be able to:**

- Understand the fundamentals of Odoo Website and eCommerce module.
- Configure and customize Odoo Website and eCommerce module.
- Create and manage products, product categories, and product attributes.
- Integrate payment gateways and manage orders, invoices, and shipping.

## **Module 15: Working with Odoo Point of Sale**

Module 15 of the Odoo Functional course covers the use of the Odoo Point of Sale module. This module provides users with the ability to manage sales, inventory, and customer data in a single, unified system. It also allows users to create custom reports and analyze sales data. Additionally, users can use the Point of Sale module to create loyalty programs and discounts for customers.

## **Lessons**

- Overview of the Odoo Point of Sale Module
- Setting up the Point of Sale Module
- Configuring the Point of Sale Module
- Working with Products and Categories in the Point of Sale Module
- Working with Customers in the Point of Sale Module
- Working with Orders in the Point of Sale Module
- Working with Payments in the Point of Sale Module
- Working with Reports in the Point of Sale Module
- Troubleshooting Common Issues in the Point of Sale Module
- . Best Practices for Working with the Point of Sale Module

### **After completing this module, students will be able to:**

- Understand the features and functionalities of the Odoo Point of Sale module.
- Configure and customize the Odoo Point of Sale module to meet the specific needs of the business.
- Create and manage orders, invoices, and payments using the Odoo Point of Sale module.
- Troubleshoot and resolve any issues related to the Odoo Point of Sale module.

## Module 16: Working with Odoo Projects

Module 16 of the Odoo Functional course covers the basics of working with Odoo Projects. It covers topics such as creating and managing projects, setting up project tasks, and tracking project progress. It also covers how to use the project management tools available in Odoo to manage resources, track costs, and generate reports.

### **Lessons**

- Overview of Odoo Projects
- Creating and Managing Projects
- Assigning Tasks to Projects
- Setting Up Project Stages
- Generating Project Reports
- Analyzing Project Performance
- Managing Project Budgets
- Integrating Projects with Other Modules
- Customizing Project Workflows
- . Troubleshooting Project Issues

### **After completing this module, students will be able to:**

- Understand the concept of Odoo Projects and how to create and manage projects in Odoo.
- Learn how to create tasks, assign tasks to users, and track progress of tasks.
- Gain knowledge of how to use the Kanban view to manage projects.
- Develop the ability to use the Gantt view to plan and schedule tasks.

## Module 17: Working with Odoo Inventory

Module 17 of the Odoo Functional course covers the basics of working with Odoo Inventory. It covers topics such as setting up warehouses, creating product categories, setting up product variants, and managing stock levels. It also covers how to use the Odoo Inventory app to manage and track inventory.

### **Lessons**

- Overview of Odoo Inventory Module
- Setting up Inventory Locations
- Configuring Inventory Adjustments
- Managing Stock Transfers
- Working with Product Variants
- Creating and Managing Barcodes
- Setting up Routes and Rules
- Working with Inventory Valuation
- Generating Inventory Reports
- . Troubleshooting Common Inventory Issues

## **After completing this module, students will be able to:**

- Understand the concepts of inventory management in Odoo
- Configure and manage warehouses, locations, and routes in Odoo
- Set up and manage product categories, units of measure, and product variants
- Create and manage stock moves, transfers, and inventory adjustments in Odoo

## **Module 18: Working with Odoo CRM**

Module 18 of the Odoo Functional course covers the basics of working with Odoo CRM. It covers topics such as creating and managing leads, opportunities, and tasks, as well as setting up and managing customer relationships. It also covers how to use the CRM dashboard to track and analyze customer data.

### ***Lessons***

- Overview of Odoo CRM Module
- Setting up and Configuring Odoo CRM
- Managing Leads and Opportunities
- Creating and Managing Quotations
- Managing Contacts and Companies
- Automating Tasks and Activities
- Analyzing and Reporting with Odoo CRM
- Integrating Odoo CRM with Other Modules
- Best Practices for Using Odoo CRM

## **After completing this module, students will be able to:**

- Understand the features and functionalities of the Odoo CRM module.
- Create and manage customer records, contacts, and leads.
- Set up and configure automated workflows and processes.
- Utilize the reporting and analytics capabilities of the Odoo CRM module.

## **Module 19: Working with Odoo Chatbot**

Module 19 of the Odoo Functional course focuses on working with Odoo Chatbot. This module covers topics such as setting up a chatbot, creating conversations, and using the chatbot to automate customer service tasks. It also covers how to integrate the chatbot with other Odoo modules, such as Sales, Accounting, and Human Resources.

### ***Lessons***

- Overview of Odoo Chatbot Module
- Setting up an Odoo Chatbot
- Understanding the Chatbot Architecture

- Integrating Chatbot with Odoo
- Developing Custom Chatbot Features
- Troubleshooting Chatbot Issues
- Deploying and Managing Chatbot
- Best Practices for Chatbot Development
- Advanced Chatbot Features and Functionalities
- . Creating Chatbot Scripts and Dialogues

**After completing this module, students will be able to:**

- Understand the fundamentals of Odoo Chatbot and its integration with Odoo
- Develop and configure Odoo Chatbot to interact with customers
- Create custom chatbot flows and scenarios to automate customer service
- Utilize the Odoo Chatbot to improve customer experience and increase customer satisfaction

## **Module 20: Working with Odoo Dashboards**

Module 20 of the Odoo Functional course focuses on working with Odoo Dashboards. It covers topics such as creating and customizing dashboards, adding widgets, and using the dashboard designer. It also covers how to use the dashboard to analyze data and create reports.

### ***Lessons***

- Introduction to Odoo Dashboards
- Creating and Customizing Dashboards
- Working with Widgets
- Analyzing Data with Charts
- Using Filters to Drill Down into Data
- Sharing Dashboards with Other Users
- Best Practices for Dashboard Design
- Troubleshooting Common Dashboard Issues
- Advanced Dashboard Features
- . Integrating External Data Sources with Dashboards

**After completing this module, students will be able to:**

- Understand the purpose and use of Odoo Dashboards
- Create and customize Odoo Dashboards
- Utilize the various features of Odoo Dashboards
- Analyze data and generate reports using Odoo Dashboards