

ODOO ERP

Sales Order To Invoice Process Flow

- ★ **ODOO ERP Written in Python, Javascript, XML and PostgreSQL Database.**
- ★ **100% User-Level Licence-free under Affero General Public Licence.**
- ★ **Support Public, Private and Hybrid offerings on Cloud.**

★ Can readily be integrated with Amazon web services & Google Cloud.

★ 100% Ownership as it is fully Opensource and highly secured over cloud.
Can be deployed on secure environment of Ubuntu and Redhat OS.

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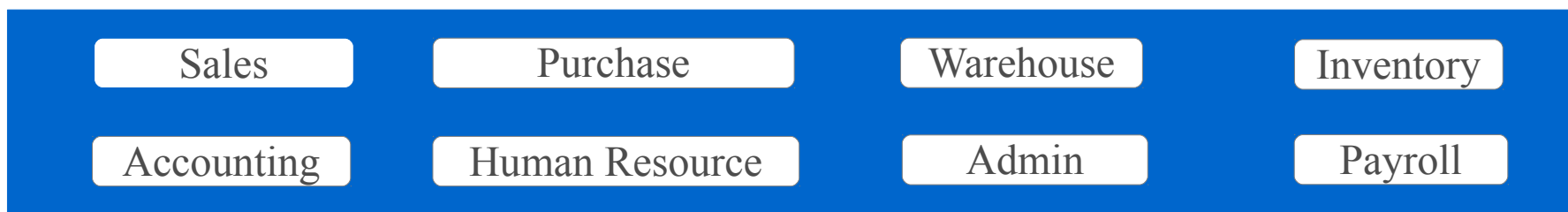
Introduction

- ★ Tefugen's Odoo ERP Base modules and the Value-Adds feature.
- ★ In this presentation, we discuss on Lead Generation To Sales Invoice Process for managing our daily transactions.

Our Odoo ERP

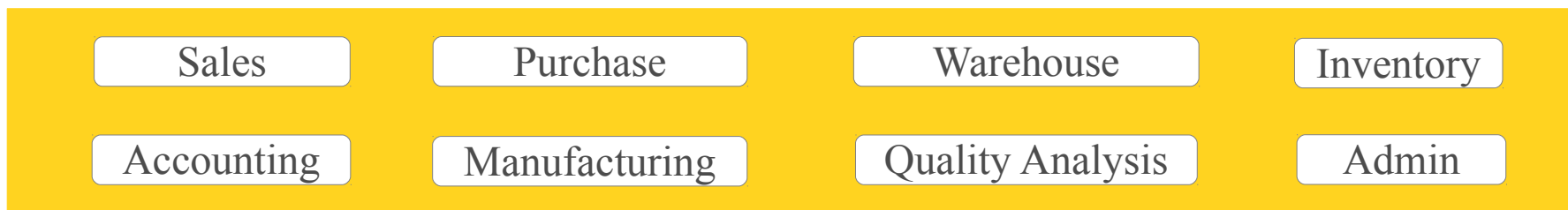
Base module features

★ Option # 1 : General



OR

★ Option # 2 : Manufacturing Resource Planning(MRN)



- **Report Template designs**

Sales Order

Purchase Order

Sales Invoice

Delivery Order

Goods-Receipt Note

Goods-Inward Note

- **Configuration Setup**

Client's name & Logo updation

Document Serial Number

Outgoing Email Server Setup

Tax creation

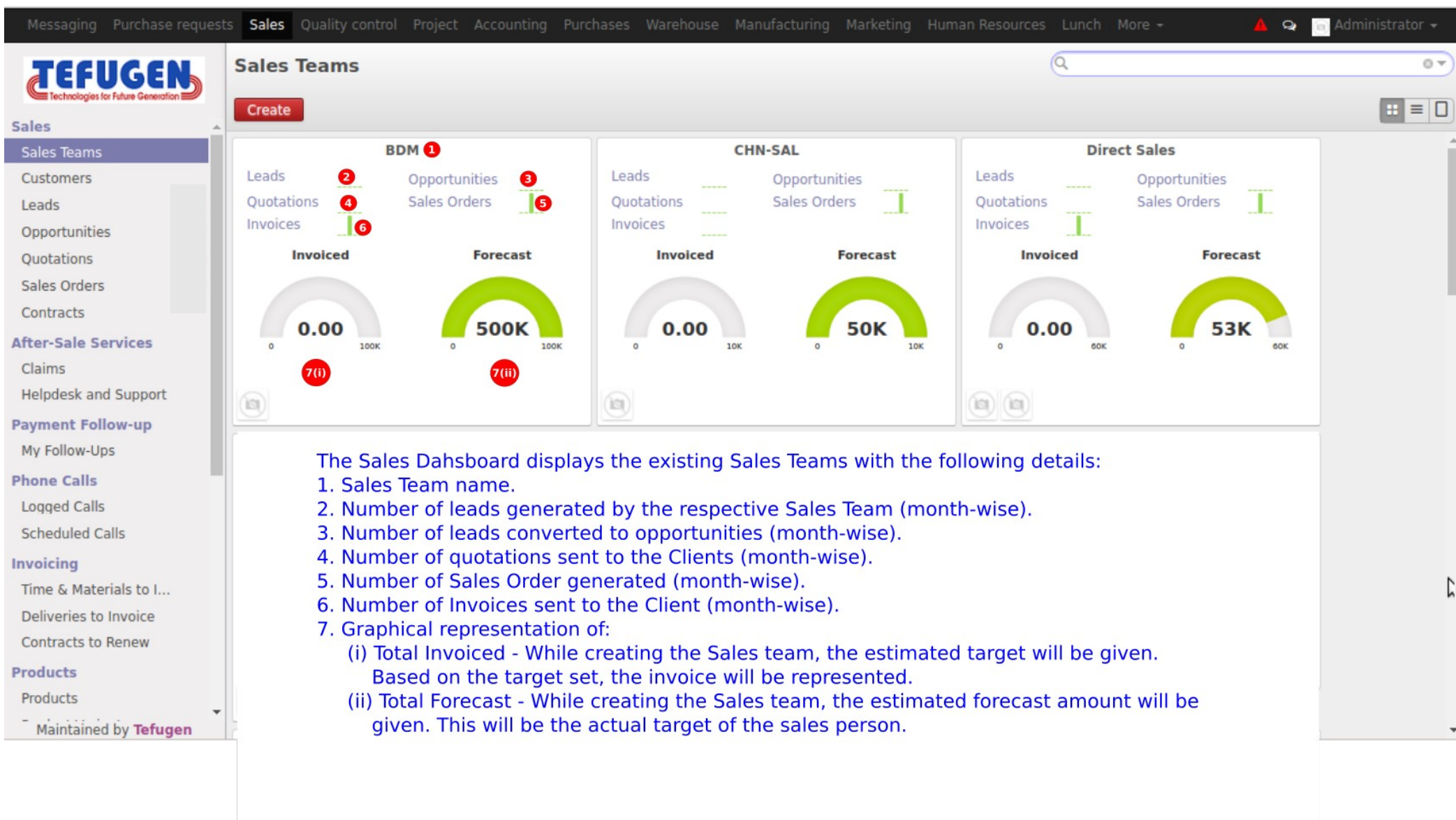
Payslip generation for the Manual entry

Account configuration

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Creating Sales Team

Messaging

Purchase requests

Sales

Quality control

Project

Accounting

Purchases

Warehouse

Manufacturing

Marketing

Human Resources

Lunch

More

Administrator

TEFUGEN

Technologies for Future Generation

Sales Teams / New

Save or Discard

Sales

Sales Teams

Customers

Leads

Opportunities

Quotations

Sales Orders

Contracts

After-Sale Services

Claims

Helpdesk and Support

Payment Follow-up

My Follow-Ups

Phone Calls

Logged Calls

Scheduled Calls

Invoicing

Time & Materials to I...

Deliveries to Invoice

Contracts to Renew

Products

Products

Maintained by Tefugen

Sales team

Quotations

Leads

Opportunities

Team Leader

Code

Invoice Target

0

Invoice Forecast

0

Parent Team

Reassign Escalated

Active

Team Members

Stages

Notes

Name

Add an item

Creating Sales Teams with the following details:

- Sales Team name.
 - We can mention the involvement of the sales team on various required stages (Quotation, Leads, Qualification).
- Name of the Team Leader. A list of existing team leader will be shown in the drop-down or a new team leader can be created (Refer Slide# 5).
- An unique code for the sales team can be set for internal references.
- Invoice target is the amount set to achieve the sales.
- Invoice forecast is the estimated expected amount from the sales.
- Name of the Parent Team Leader if exist will be selected. A list of existing parent team will be shown in the drop-down or a new parent team can be created (Refer Slide# 6).
- A New Team Members can be added by entering the basic required details (Refer Slide#7).
- Stages like Quotation, Lead, Qualification, etc., can be newly created.
- Any additional notes can be mentioned in the notes tab.

Creating Team Leader

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Technologies for Future Generation

Messaging Purchase requests Sales Quality control Project Accounting Purchases Warehouse Manufacturing Marketing Human Resources Lunch More - Administrator -

Create: Team Leader

You are creating a new user. After saving, the user will receive an invite email containing a link to set its password.

Name 1

Email Address 2
email@yourcompany.com

Access Rights 3
Human Resources / Employee Contact Creation Sales / See all Leads You will be able to define additional access rights by editing the newly created user under the Settings / Users menu.

Phone

Mobile 4

Fax

Save or **Discard**

Creating Team leader with the following details:

1. Team leader name.
2. email address of the respective team leader.
3. If a team leader has responsibility on multiple departments, then the access rights can be given to the various departments.
4. Contact details of the Team Leader.

Creating Parent Team

Create: Parent Team

Sales team 1

☒ Quotations ☒ Leads ☒ Opportunities

Team Leader 2

Code 3

Invoice Target 4

Invoice Forecast 5

Parent Team 6

Reassign Escalated ☐

Active 7

Team Members 7 Stages 8 Notes 9

Name

Add an item

Save or **Discard**

Creating Parent Teams with the following details:

1. Parent Team name.
 - (i) We can mention the involvement of the parent team on various required stages (Quotation, Leads, Qualification).
2. Name of the Team Leader. A list of existing team leader will be shown in the drop-down or a new team leader can be created (Refer Slide# 5).
3. An unique code for the parent team can be set for internal references.
4. Invoice target is the amount set to achieve the sales.
5. Invoice forecast is the estimated expected amount from the sales.
6. Name of the Parent Team if exist will be selected. A list of existing parent team will be shown in the drop-down or a new parent team can be created (Refer Slide# 6).
7. A New Team Members can be added by entering the basic required details (Refer Slide#7).
8. Stages like Quotation, Lead, Qualification, etc., can be newly created.
9. Any additional notes can be mentioned in the notes tab.

Creating Team Members

Add: Team Members

You are creating a new user. After saving, the user will receive an invite email containing a link to set its password.

Name 1

Email Address 2
email@yourcompany.com

Access Rights 3
Human Resources / Employee Contact Creation You will be able to define additional access rights by editing the newly created user under the Settings / Users menu.

Phone 4

Mobile

Fax

Buttons: Save & Close, Save & New, or Discard

Creating Team members with the following details:

1. Team member name.
2. Email address of the respective team member.
3. If a team member is working on multiple departments, then the access rights can be given to the various departments.
4. Contact details of the Team member.

Messaging

Purchase requests

Sales

Quality control

Project

Accounting

Purchases

Warehouse

Manufacturing

Marketing

Human Resources

Lunch

More

Administrator

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Technologies for Future Generation

1

Create

or Import

3

4

Unassigned x

1-2 of 2

Sales

Sales Teams

Customers

Leads

Opportunities

Quotations

Sales Orders

Contracts

After-Sale Services

Claims

Helpdesk and Support

Payment Follow-up

My Follow-Ups

Phone Calls

Logged Calls

Scheduled Calls

Invoicing

Time & Materials to I...

Deliveries to Invoice

Contracts to Renew

Products

Products

Maintained by Tefugen

Leads

	Creation Date	Subject	Contact Name	Country	Email	Phone	Stage	Sales Team
<input type="checkbox"/>	03/17/2018 11:12:52	Need Info about your Services	Tina Pinero	Italy	tina@opensides.be		New	Marketing
<input type="checkbox"/>	03/17/2018 11:12:52	Need a Quotation for Computers with Accessories	Carrie Helle	United States	helle@stonageit.be	+1 813 494 5005	New	Indirect Sales

2

The Leads Dashboard displays the list of existing leads with its stage and basic details:

1. A new lead can be created (Refer Slide# 8).
2. An existing lead can be selected and converted to Opportunities.
3. A new lead can be imported from a .csv file.
4. Search bar can be used for a quick find.

Creating Leads

Messaging Purchase requests **Sales** Quality control Project Accounting Purchases Warehouse Manufacturing Marketing Human Resources Lunch Knowledge Reporting Website Settings Administrator

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Leads / New

Save or Discard

Convert to Opportunity

Subject
Describe the lead... 1

16 Schedule/Log Calls

2 Company Name

3 Customer

4 Address

5 Salesperson

6 Sales Team

7 Contact Name

8 Email

9 Function

10 Phone

11 Mobile

12 Fax

13 Priority

14 Tags

15 Internal Notes

16 Extra Info

Marketing 13

Campaign

Channel

Source

Mailings 14

Opt-Out

Bounce

Misc 15

Success Rate (%)

Active

Referred By

Assigned

Closed

Creating Leads with the following details:

1. Lead description.
2. Name of the Company.
3. Name of the Customer (either it can be selected from the existing list or can be created for new customers).
4. Address details of the Customers.
5. Sales Person who deals with the lead.
6. Sales team name of the respective sales person.
7. Name of the Contact Person and title.
8. Basic contact details of the Contact Person (Mobile, email, Fax, Phone, Role he plays, etc.).
9. A creating lead can be set priority (low, normal, high and very high) with "star" indication.
10. Tags can be specified as a hint of the product / service.
11. Internal notes can be mentioned.
12. Extra info consists of 3 main categories related to the lead: Marketing, Mailing, Misc.
13. Marketing tab consists of the Marketing person and related details.
14. Mailing tab consists of the email base setting details like opt-out.
15. Misc tab consists of the success rate(%), active state or not, reference details, status of the lead.
16. Calls can be scheduled and logged calls list can be viewed (Refer Slide# 10).

Messaging

Purchase requests

Sales

Quality control

Project

Accounting

Purchases

Warehouse

Manufacturing

Marketing

Human Resources

Lunch

More

Administrator

TEFUGEN

Technologies for Future Generation

Sales

Sales Teams

Customers

Leads

Opportunities

Quotations

Sales Orders

Contracts

After-Sale Services

Claims

Helpdesk and Support

Payment Follow-up

My Follow-Ups

Phone Calls

Logged Calls

Scheduled Calls

Invoicing

Time & Materials to I...

Deliveries to Invoice

Contracts to Renew

Products

Products

Maintained by Tefugen

Leads / Need Info ... / Logged Calls

Save or Discard

Date	Call Summary	Contact	Responsible
01/04/2019 04:12:3			Administrator

Creating Call Log with the following details:

1. Date and time of the call.
2. Call summary.
3. Name of the Contact person.
4. Name of the responsible person for the Call..

Messaging

Purchase requests

Sales

Quality control

Project

Accounting

Purchases

Warehouse

Manufacturing

Marketing

Human Resources

Lunch

More

Administrator

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Leads / Odoo Erp Implementation

Edit

Create

More

3 / 3

New

More

Convert to Opportunity

1

Odoo Erp Implementation

Company Name

Customer

Address

Wavre

Belgium

1300

Salesperson

Sales Team

Agrolait

Agrolait, Michel Fletcher

69 rue de Namur

Wavre

Belgium

1300

Administrator

Direct Sales

Escalate

Contact Name

Email

Function

Phone

Mobile

Fax

Priority

Tags

Michel Fletcher

michel.fletcher@agrolait.example.com

Analyst

★★★★

Schedule/Log Calls

Internal Notes

Extra Info

Send a message

or

Log an internal note

2

Following

One follower

Add others

Administrator

Next step after Creating Lead with the following details:

1. A lead can be edited or converted to Opportunity.
2. Followers of the lead can be added and the updates will be sent to all the followers.

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Slide #14/29

Converting to Opportunity

Convert to opportunity

Conversion Action 1. Convert to opportunity
Convert to opportunity
Merge with existing opportunities

Assign opportunity

Salesperson 2. Administrator

Sales Team 3. Direct Sales

Opportunities

Related Customer 4. Create a new customer
Link to an existing customer
Create a new customer
Do not link to a customer

Create Opportunity

Converting to Opportunities with the following details:

1. Conversion action to be selected whether to Convert to Opportunity or Merge with existing opportunities.
2. Name of the Salesperson who created the Opportunity.
3. Name of the Sales Team on which the corresponding Salesperson belongs to.
4. Selecting the Customer related to the Opportunity whether the Opportunity links to an existing customer / Opportunity belongs to the new customer / the opportunity does not link with any customer.

Opportunities - Dashboard

Messaging Purchase requests **Sales** Quality control Project Accounting Purchases Warehouse Manufacturing Marketing Human Resources Lunch Knowledge Reporting Website More ▾ Administrator ▾

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Opportunities

Create or Add a new column

Undefined 1 + Expected Revenues: 3800.00

Need a new design for my website - 3800.00 INR
WWW.BESTOMART.COM
03/01/2018 : Convert to quote
★ ★ ★ ★ ★

New 6 + Expected Revenues: 210000.00

Interest in your products - 20000.00 INR
Agrolait
03/10/2018 : Send Catalogue by Email
★ ★ ★ ★ ★

ODOO CRM IMPLEMENTATION - 50000.00 INR
Bestomart
12/01/2018 :
★ ★ ★ ★ ★

ODOO CRM Implementation - 100000.00 INR
Bestomart
12/01/2018 :
★ ★ ★ ★ ★

Odoo Erp Implementation
Agrolait, Michel Fletcher
01/04/2019 :
1 New ★ ★ ★ ★ ★

Plan to buy 60 keyboards and mouses - 40000.00 INR
03/12/2018 : Meeting for pricing information.
1 New ★ ★ ★ ★ ★

Qualification 4 + Expected Revenues: 149000.00

Interest in your Graphic Design Project - 24000.00 INR
Agrolait
03/10/2018 : Send Catalogue by Email
★ ★ ★ ★ ★

CRM IMPLEMENTATION - 50000.00 INR
COMAPNY-1
★ ★ ★ ★ ★

CRM IMPLEMENTATION - 50000.00 INR
WWW.BESTOMART.COM
★ ★ ★ ★ ★

Plan to buy RedHat servers - 25000.00 INR
Agrolait
03/10/2018 : Call to ask system requirement
★ ★ ★ ★ ★

Proposition 5 + Expected Revenues: 70250.00

"Resource Planning" project development - 350.00 INR
Bank Wealthy and sons
1 New ★ ★ ★ ★ ★

Interest in your Partnership Contract - 19800.00 INR
Epic Technologies
★ ★ ★ ★ ★

Pricing Information of Services - 100.00 INR
03/03/2018 : Send price list regarding our interventions
★ ★ ★ ★ ★

Trainee's training plan in your Organization - 35000.00 INR
Delta PC
03/04/2018 : Call to define real needs about training
2 New ★ ★ ★ ★ ★

Interest in your customizable Pcs - 15000.00 INR
Global Solutions
03/05/2018 : Ask for the good reception of the proposition
★ ★ ★ ★ ★

Negotiation 5 + Expected Revenues: 23645.00

Would appreciate more information about your products - 11000.00 INR
Agrolait
03/10/2018 : Send Catalogue by Email
★ ★ ★ ★ ★

Need to customize the solution - 4060.00 INR
Conf call with technical service
1 New ★ ★ ★ ★ ★

Need script to Import external data - 560.00 INR
Nebula Business
1 New ★ ★ ★ ★ ★

Need 20 Days of Consultancy - 6025.00 INR
1 New ★ ★ ★ ★ ★

Want to subscribe to your online solution - 2000.00 INR
Think Big Systems
★ ★ ★ ★ ★

1 4 Mon Lost

3

Maintained by Tefugen

Opportunity Dashboard contains the following details:

1. A new Opportunity can be created.
2. A new Marketing campaign phase can be added.
3. The Kanban view of the existing phase with its respective Opportunity details

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Messaging Purchase requests **Sales** Quality control Project Accounting Purchases Warehouse Manufacturing Marketing Human Resources Lunch Knowledge Reporting Website More Administrator

Opportuni... / asdf

Save or Discard

38 / 38

Mark Won Mark Lost Convert to Quotation

New Qualification Proposition Negotiation More

Subject

Expected Revenue 0.00 ₹ at 0 %

Customer

Email

Phone

Next Action e.g. Call for proposal

Expected Closing

Priority ★ ★ ★ ★

Salesperson Administrator

Sales Team Direct Sales Escalate

Tags

Internal Notes **Lead**

10 **11**

Creating Opportunities with the following details:

1. Opportunity description.
2. Expected Revenue and Percentage will be calculated based on the phases (as mentioned in #11).
3. Name of the Customer (either it can be selected from the existing list or can be created for new customers) and his contact details.
4. Due date for the next follow-up/action can be set.
5. Expected closing date can be set.
6. Tags can be specified as a hint of the product / service.
7. Sales team name of the respective sales person.
8. Internal notes can be mentioned.
9. Lead tab consists of 3 main categories related to the lead: Marketing, Mailing, Misc. Name of the Customer and the basic details of the Contact Person. Marketing tab consists of Campaign, Channel and resource (can be selected or newly created). Mailing tab consists of the email base setting details like opt-out. Misc tab consists of active state or not, reference details, status of the Opportunities

10. While creating opportunity, it can be marked as won, lost or convert to quotation.

11. The mentioned Phases in the Opportunity dashboard, will be visible and the opportunity can be moved directly to the required phase while creation.

Converting to Quotation

The screenshot displays the TEFUGEN CRM interface. At the top, a navigation bar includes links for Messaging, Purchase requests, Sales, Quality control, Project, Accounting, Purchases, Warehouse, Manufacturing, Marketing, Human Resources, Lunch, Knowledge, Reporting, Website, and More. A user profile for 'Administrator' is visible in the top right corner. The left sidebar contains a menu with categories: Sales (Sales Teams, Customers, Leads, Opportunities, Quotations, Sales Orders, Contracts), After-Sale Services (Claims, Helpdesk and Support), Payment Follow-up (My Follow-Ups), Phone Calls (Logged Calls, Scheduled Calls), Invoicing (Time & Materials to Invoice, Deliveries to Invoice, Contracts to Renew), Products (Products, Product Variants, Products by Category), and Tools. The main content area shows a 'Make Quotation' dialog box. The dialog box has a title bar with a close button. Inside, there is a 'Customer' field with a dropdown menu showing 'Agrolait, Michel Fletcher' and a 'Mark Won' button. Below the dialog box, a text box explains that a draft Quotation will be created by entering the following details: 1. Selecting the name of the customer to whom the quotation must be created and can be selected as Won during creation.

A draft Quotation will be created by entering the following details:

1. Selecting the name of the customer to whom the quotation must be created and can be selected as Won during creation.

Converted Quotation

Messaging

Purchase requests

Sales

Quality control

Project

Accounting

Purchases

Warehouse

Manufacturing

Marketing

Human Resources

Lunch

Knowledge

Reporting

Website

More

Administrator

TEFUGEN

Technologies for Future Generation

Opportuni... / Odoo Erp I... / S0043

Edit

Create

Print

More

Send by Email

Print

Confirm Sale

Cancel Quotation

Draft Quotation

Quotation Sent

Sales Order

Done

1

2

Quotation Test/001

Customer

Millennium Industries
89 Lingfield Tower
London
United Kingdom

Date

03/17/2018 11:19:13

Reference/Description
Warehouse

YourCompany

Order Lines

Other Information

Product	Description	Quantity	Unit of Measure	Unit Price	Taxes	Discount (%)	Subtotal
[LAP-CUS] Laptop Customized	Laptop Customized	2.000	Unit(s)	3645.00		0.00	7290.00
[M-Wir] Mouse, Wireless	Mouse, Wireless	2.000	Unit(s)	12.50		0.00	25.00

Untaxed Amount :

7315.00 ₹

Taxes :

0.00 ₹

Total :

7315.00 ₹

Delivery Method

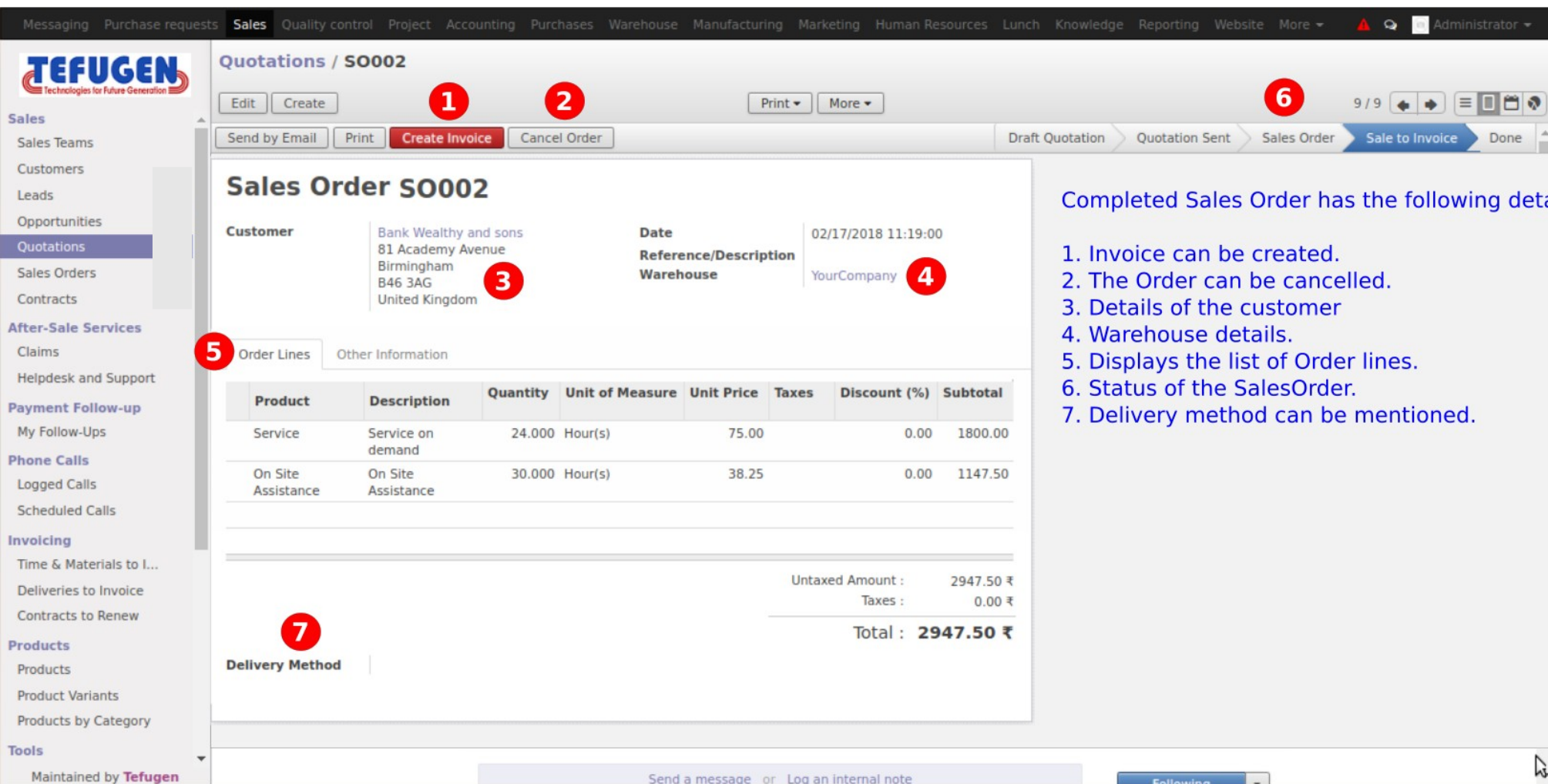
Created Draft Quotation will have the following details:

1. Draft quotation can be sent by email.
2. Draft quotation can be print/saved.
3. The quoted sales can be confirmed.
4. Draft quotation can be cancelled.
5. Draft quotation can be edited.
6. Status of the quotation can be viewed.

Sending Email

The screenshot shows the 'Sending Email' dialog box in the Tefugen CRM. The dialog has a sidebar on the left with navigation links: Sales, Sales Teams, Customers, Leads, Opportunities, Quotations, Sales Orders, Contracts, After-Sale Services, Claims, Helpdesk and Support, Payment Follow-up, My Follow-Ups, Phone Calls, Logged Calls, Scheduled Calls, Invoicing, Time & Materials to Invoice, Deliveries to Invoice, Contracts to Renew, Products, Products Variants, Products by Category, and Tools. The main area of the dialog is titled 'Sending Email' and contains the following elements:

- Subject:** A text field containing 'Tefugen Technologies Private Limited Quotation (Ref SO043)' (Annotation 1).
- Recipients:** A dropdown menu showing 'Followers of the document and Agrolait, Michel Fletcher <michel.fletcher@agrolait.example.com>' (Annotation 2).
- Body:** A rich text editor containing the email content. The content includes a greeting 'Hello Michel Fletcher,' followed by 'Here is your quotation from Tefugen Technologies Private Limited:'. Below this is a 'REFERENCES' section with details: Order number: SO043, Order total: 0.0 INR, Order date: 01/04/2019 09:58:20 (Asia/Kolkata), Order reference: Opportunity: 56, and Your contact: Administrator. A 'View Quotation' button is present. The body also contains an attached file 'SO043_draft.pdf' (Annotation 4) and an 'Attach a file' button (Annotation 5).
- Footer:** A 'Send' button, a 'Cancel' button, and a 'Use template' dropdown menu. The dropdown menu is open, showing a list of templates: 'Sales Order - Send by Email', 'Sales Order - Send by Email (Portal)', 'Sales Order: Tefugen Technologies Private Limited Quotation (Ref SO044)', and 'Sales Order - Send by Em' (Annotation 6). A 'Save as new template' button is also visible (Annotation 7).



The screenshot shows the TEFUGEN Sales Order S0002 interface. The top navigation bar includes tabs for Messaging, Purchase requests, Sales, Quality control, Project, Accounting, Purchases, Warehouse, Manufacturing, Marketing, Human Resources, Lunch, Knowledge, Reporting, Website, and More. The left sidebar lists various modules: Sales, After-Sale Services, Payment Follow-up, Phone Calls, Invoicing, Products, and Tools. The main content area displays the Sales Order S0002 details, including customer information, order lines, and a summary table. Red numbered callouts (1-7) highlight specific features: 1. Create Invoice button, 2. Cancel Order button, 3. Customer details, 4. Warehouse details, 5. Order Lines tab, 6. Status of the SalesOrder, and 7. Delivery Method.

Sales Order S0002

Customer Bank Wealthy and sons
81 Academy Avenue
Birmingham
B46 3AG
United Kingdom

Date 02/17/2018 11:19:00

Reference/Description YourCompany

Warehouse

Order Lines

Product	Description	Quantity	Unit of Measure	Unit Price	Taxes	Discount (%)	Subtotal
Service	Service on demand	24.000	Hour(s)	75.00		0.00	1800.00
On Site Assistance	On Site Assistance	30.000	Hour(s)	38.25		0.00	1147.50

Summary

Untaxed Amount :	2947.50 ₹
Taxes :	0.00 ₹
Total :	2947.50 ₹

Delivery Method

Completed Sales Order has the following details:

1. Invoice can be created.
2. The Order can be cancelled.
3. Details of the customer
4. Warehouse details.
5. Displays the list of Order lines.
6. Status of the SalesOrder.
7. Delivery method can be mentioned.

Creating Invoice

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Quotations / Invoice Order

Select how you want to invoice this order. This will create a draft invoice that can be modified before validation.

What do you want to invoice?

- Invoice the whole sales order
- Invoice the whole sales order
- Percentage
- Fixed price (deposit)
- Some order lines


Create and View Invoice **Create**

Creating Invoice has the following details:

1. Draft invoice can be created by mentioning how the invoice to be created (percentage / fixed price / selected order lines).
2. The Invoice can be created or created and can be viewed the draft.

Summary	
Subtotal	1800.00
	1147.50
	2947.50 ₹
	0.00 ₹
	7.50 ₹

Draft Invoice



Customers

Customer Invoices

Customer Refunds

Sales Receipts

Customer Payments

Customers

Suppliers

Supplier Invoices

Supplier Refunds

Purchase Receipts

Supplier Payments

Write Checks

Suppliers

Bank and Cash

Bank Statements

Cash Registers

Journal Entries

Journal Items

Journal Entries

Journal Vouchers

Analytic Journal Items

Charts

Chart of Accounts

Chart of Analytic Acc...

Chart of Taxes

Customer ... / Invoice

Edit

Create

Print

More

2 / 22

←

→

≡

📄

🔍

Validate

PRO-FORMA

Cancel Invoice

Draft

Open

Paid

1

2

3

4

5

Draft Invoice

Customer

Invoice Date

Journal

Sales Journal (INR)

Fiscal Position

Account

121330 Sundry Debtors

Invoice Lines

Other Info

Payments

Product	Description	Account	Analytic Account	Quantity	Unit of Measure	Unit Price	Discount (%)	Taxes	Amount
ODOO Implementation	ODOO Implementation	201500 Product Sales	YourCompany / zorlu	1.000	Unit(s)	0.00	0.00	Input Excise Duty @ 12.36%	0.00

Subtotal :

0.00 ₹

Tax :

0.00 ₹

Total :

0.00 ₹

Balance :

0.00 ₹


Payment Terms

Additional Information

Draft Invoice contains the following details:

1. The Draft Invoice can be validated.
2. The Pro-forma Invoice can be generated.
3. The Draft Invoice can be cancelled.
4. Journal and the Account details will be mentioned in the Draft Invoice.
5. Payment terms can be mentioned.

Validating Invoice



Customers

Customer Invoices

Customer Refunds

Sales Receipts

Customer Payments

Customers

Suppliers

Supplier Invoices

Supplier Refunds

Purchase Receipts

Supplier Payments

Write Checks

Suppliers

Bank and Cash

Bank Statements

Cash Registers

Journal Entries

Journal Items

Journal Entries

Journal Vouchers

Analytic Journal Items

Charts

Chart of Accounts

Chart of Analytic Acc...

Chart of Taxes

Maintained by Tefugen

Customer ... / SAJ/2019/0011

Edit

Create

1

2

3

Print

More

Send by Email

Print

Register Payment

Refund Invoice

Cancel Invoice

2 / 22

Draft

Open

Paid

Invoice SAJ/2019/0011

Customer

Zorlu, Ali Mehdi Zorlu

Invoice Date

01/04/2019

Fiscal Position

Journal

Sales Journal (INR)

Account

121330 Sundry Debtors

4

Invoice Lines

Other Info

Payments

Product	Description	Account	Analytic Account	Quantity	Unit of Measure	Unit Price	Discount (%)	Taxes	Amount
ODOO Implementation	ODOO Implementation	201500 Product Sales	YourCompany / zorlu	1.000	Unit(s)	0.00	0.00	Input Excise Duty @ 12.36%	0.00

Subtotal :

0.00 ₹

Tax :

0.00 ₹

Total :

0.00 ₹

Balance :

0.00 ₹

Payment Terms

Additional Information

After Validation of the draft Invoice, it converts to Open stage and contains the following details:

- 1.Payment can be registered for the Opened Invoice.
2. If, the Payment has been already made the Invoice can be refunded.
3. The Invoice can be cancelled in the Open Stage.
4. Displays the list of Invoice Lines.

Customer Invoices - Odoo - Chromium

Customer Invoice x

Not secure | 192.168.0.186:8069/web?#id=25&view_type=form&model=account.invoice&menu_id=225&action=258

Apps Zimbira Web Cl National & Inte Conference Ale The W3C Marki zn Top 65 High PR e Top 15 Most Po Audience Targe

Messaging Purchase requests Sales Quality control Project Accounting Purchases Warehouse Manufacturing Marketing Human Resources Lunch Knowledge Reporting Website More Administrator

TEFUGEN Technologies for Future Generation

Customer Invoices

Customer Refunds

Sales Receipts

Customer Payments

Customers

Suppliers

Supplier Invoices

Supplier Refunds

Purchase Receipts

Supplier Payments

Write Checks

Suppliers

Bank and Cash

Bank Statements

Cash Registers

Journal Entries

Journal Items

Journal Entries

Journal Vouchers

Analytic Journal Items

Charts

Chart of Accounts

Chart of Analytic Acc...

Chart of Taxes

Maintained by Tefugen

Pay Invoice

Customer 1 Zorlu

Paid Amount 0.00 ₹ 2

Payment Method 3 Cash

Cash

Credit Card

Debit Card

Date 01/04/2019

Period 2019 4

Payment Ref e.g. 003/10

Memo e.g. Invoice SAJ/0042

Difference Amount 0.00 ₹ 5

Register Payment or Cancel

While Registering Payment for an Invoice, it has the following details:

1. Name of the Customer.
2. Total amount paid.
3. Payment Method must be chosen.
4. Date of the Payment done, Financial year on which the payment has been made, Payment references if any.
5. If partial payment done, the difference amount must be mentioned.

Additional Information

Amount

0.00

0.00 ₹

0.00 ₹

0.00 ₹

0.00 ₹

(contd.,) - Refund

Customer Invoices - Odoo - Chromium

Customer Invoice x

Not secure | 192.168.0.186:8069/web?#id=25&view_type=form&model=account.invoice&menu_id=225&action=258

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Chart of Analytic Acc...

Chart of Taxes

Maintained by Tefugen

Refund Invoice

Refund Method 1 Create a draft refund

Reason 2

Refund Journal 3 Sales Refund Journal (INR)

Date 01/04/2019

Force period 4

Create Refund or Cancel

A paid invoice can be refunded and has the following details:

1. Refund method must be selected.
2. Reason must be mentioned.
3. Refund journal must be selected.
4. Force period can be mentioned, based on that the refund must be done.

Additional Information

Amount

0.00

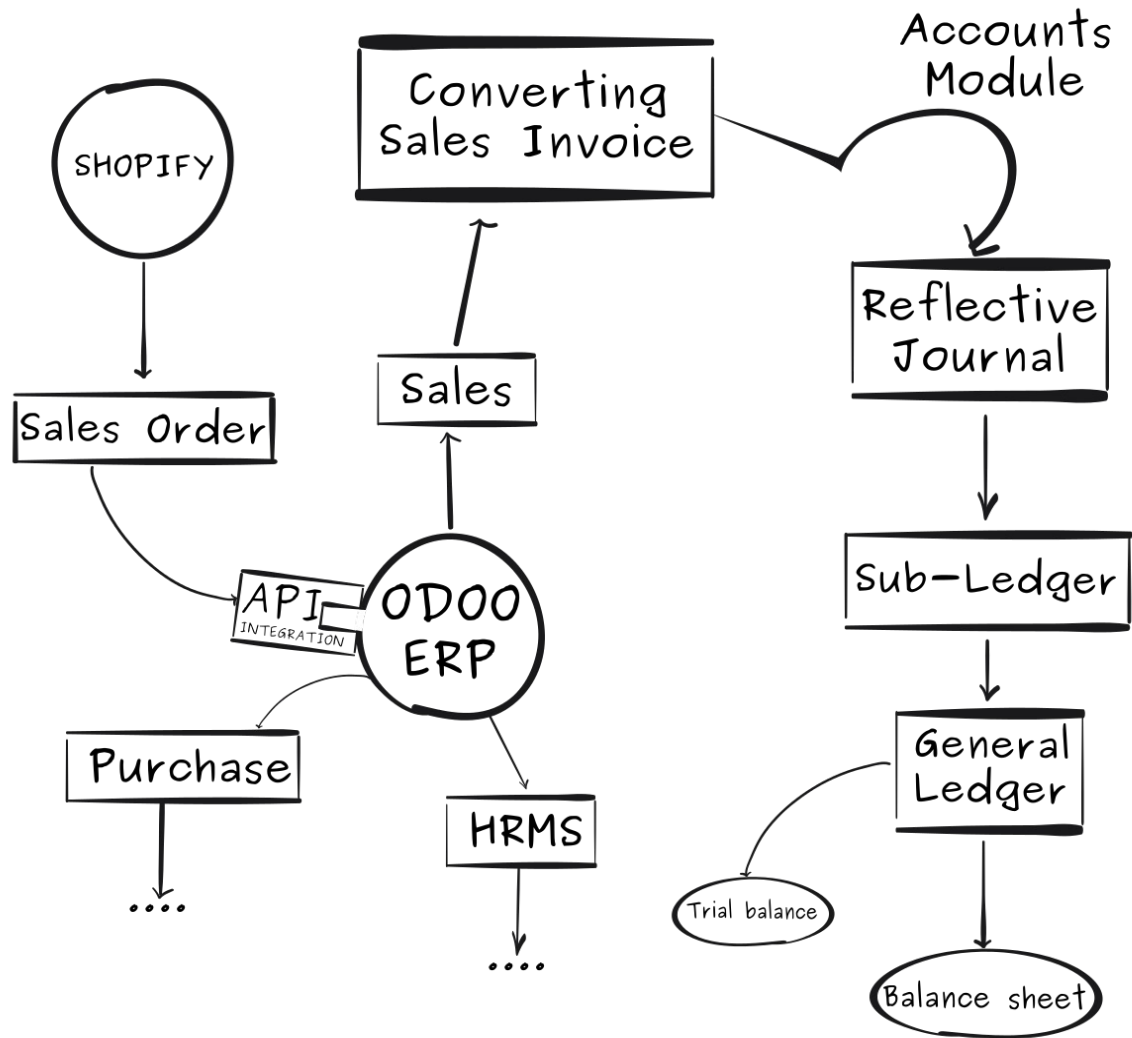
0.00 ₹

0.00 ₹

0.00 ₹

0.00 ₹

API Integration made Easy



(and all modules integration can be done).

Customers (Partial List)



Thank you

Our Business Knowledge, Your Winning Edge.

★ We would really appreciate your feedback. Please post your comment.
Feel free to reach us at it.info@tefugen.com and Please visit www.tefugen.com