

# odoo

*Odoo 18  
R&D Sneak Peak*

Christophe Klopfert, Product Owner



# *Our priorities*

- 1. Onboarding of new users*
- 2. Discovery (of existing functionalities)*
- 3. Setting up (configuration & imports)*
- 4. New features for existing users*

# Onboarding & Discovery : Accounting

### Customer Invoices

Get Paid online. Send electronic invoices.

[New Invoice](#)

Category	Value
Due	High
12 - 18 May	Low
This Week	Medium
26 May - 1 Jun	High
2 - 8 Jun	Medium
Not Due	Low

### Vendor Bills

Let artificial intelligence scan your bill. Pay easily.

[Upload](#)

Drag & drop or try our sample

or

Create a bill manually

### Bank

Connect your bank. Match invoices automatically.

Search over 36 000 banks

Record transactions manually

### Miscellaneous Operations

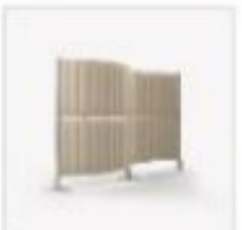
Never miss a tax deadline.

[New Entry](#)

Upload

- Set Company Data
- Set Periods
- Review Chart of Accounts

# Setting up example: the Product form

Product Name 

## ☆ Acoustic Bloc Screens

**Sales** Can be Sold  
  **Purchase** Can be Purchased  
  **Expenses** Can be Expensed?  
  **Subscriptions** Recurring?  
  **Rental** Can be Rented?  
  **Point of Sale**

Tab displayed or not based on checkbox

General Information | Attributes & Variants | Sales | Purchase | Inventory | Accounting | eBay

**Product Type?** Service  
 Consumable **Goods**  
 Service  
~~Storable Product~~  
~~Booking Fees~~  
 Combo  
~~Event Ticket~~  
~~Event Booth~~  
~~Course~~  
 Unit of Measure?  At cost

**Invoicing Policy?** *the inventory*  
*ered.*

**Unit of Measure?**  At cost

~~Purchase UoM?~~ Units *move to purchase*

**Sales Price?** \$ 295.00 (= \$ 339.25 Incl. Taxes)  
**Sales Customer Taxes?** 15% X *on change; recompute purchase VFE: not tested, seems to be*

**Avatax Category?**  
**Cost?** \$ 287.00 per Units  
**Purchase Taxes**  
~~Product Category~~ All / Saleable / Office Furniture *← on change; recompute purchase tax invisible if service*

~~Internal Reference~~ FURN\_6666 Version? 1  
 Barcode 601647855653  
~~Product Template Tags~~ *→ move to sales*  
~~Configure tags~~  
 Company

*add purchase taxes here (remove it from purchase tab) Hide it if Purchase == false*

**INTERNAL NOTES**

This note is only for internal purposes.



# *Sales & Cie*



# Sales Commissions

*New module to compute the commissions of Sales persons*

Achievements and Targets can be based on:

- Amount Invoiced
- Amount Sold
- Margin
- Sold quantity
- Invoiced quantity
- New MRR (if subscription)

Possibility to combine different rules with specific ponderation for specific products, product categories or recurring period.

## Commission Plan: form

Actions  
 Archive  
 Duplicate  
 Set to draft
 

 >  >

Commission Plan  
*i.e. Commissions plan 2024*

Dates \_\_\_\_\_ -> \_\_\_\_\_ Company Odoo IN Pvt Ltd

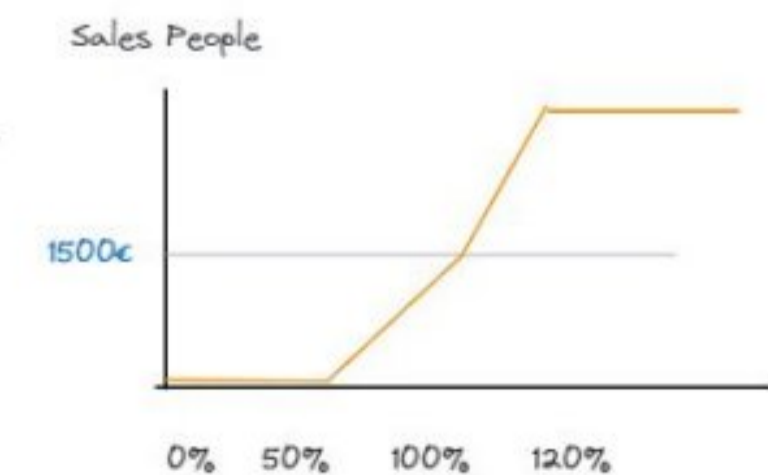
Periodicity monthly, quarterly, yearly

Based on Achievements, Targets per Person, Team

Commission on Target \$1500.00 per quarter

Commissions	Targets	Achievements	Sales People	
Achievement	Product	Category	Recurring	Rate
Invoiced Amount			non recurring	50%
New MRR	<i>any product</i>	<i>any category</i>	Monthly	100%
New MRR			Yearly	100%
New MRR			3 Years	300%
New MRR			5 Years	500%

As of	Commissions Rate	Targets Commission	Achievements
0 %	0%	0€	
50 %	0%	0€	
100 %	100%	1500€	
150 %	200%	3000€	



# Loyalty in Portal

## My account



- 1 Quotations to review
- 1 Document(s) to sign
- Sales Orders**  
Follow, view or pay your orders
- Your Invoices**  
Follow, download or pay your invoices
- Payment methods**  
Manage your payment methods
- Documents**  
Access your signed documents
- Subscriptions**  
Manage your subscriptions
- Projects**  
Follow the evolution of your projects
- Tasks**  
Follow and comments tasks of your projects
- Timesheets**  
Review all timesheets related to your projects
- Tickets**  
Follow all your helpdesk tickets

 **Joel Willis**  
YourCompany

📍 858 Lynn Street  
Bayonne NJ 07002  
United States

📞 (683)-556-5104  
✉ joel.willis63@example.com

[Edit information](#)


-  **E-Wallet**  
\$0.23
-  **Loyalty card**  
1589 Points


 **Your Wallet** \$12.88

**Last Movements**

- Online payment S00085 - \$15.56
- Online payment S00095 - \$21.61

\$50.00  [Top up now](#)

 **Loyalty card** 1589 points

  
05246897

[10% on your next order](#) [Use it now](#)

[--> see history](#)

# Combo products "everywhere"

## POS + Sales, Ecommerce, Rental, Subscriptions





### Burger Menu Combo

\$ 10.00

...  
*Product description*  
...

- 1 + [Add to cart](#)

 [Add to wishlist](#)

 [Compare](#)

[Terms and Conditions](#)  
30-day money-back guarantee  
Shipping: 2-3 Business Days

#### Burger Menu Combo

##### Burgers Choice



Bacon Burger



Cheese Burger

##### Drinks choice



Coca-Cola



Water



Minute Maid



Milkshake  
Banana  
\$ 2.30

[Add to order](#)



# PDF Quote builder 2.0

- Translations
- Use any fields (based on a whitelist)
- Insert custom zones that can be manually modified for each quotation.

S00070

Customer Deco Addict  
77 Santa Barbara Rd  
Pleasant Hill CA 94523  
United States - US12345673

Expiration 07/04/2024

Recurring Plan

Pricelist ? Benelux (USD)

Payment Terms 30 Days

Quotation Template Meeting Room

Order Lines Optional Products **Descriptions** Other Info Notes

Activate

Stealthy Wood

Proposal for Joel's kitchen redesign in a modern way.

Quotation S00086

Joel Willis

No custom zone

Put fields in your PDF templates to define content areas. Update Sections to start specifications, project's clarifications, details of the offer, etc.

Customize Your Quote

Header

Header FR

Header EN

Testimonial: Retail

Testimonial: POS

Methodology

Product XYZ

Product Sheet

Other File

Other Product

Product Sheet

Footer

Terms & Cond

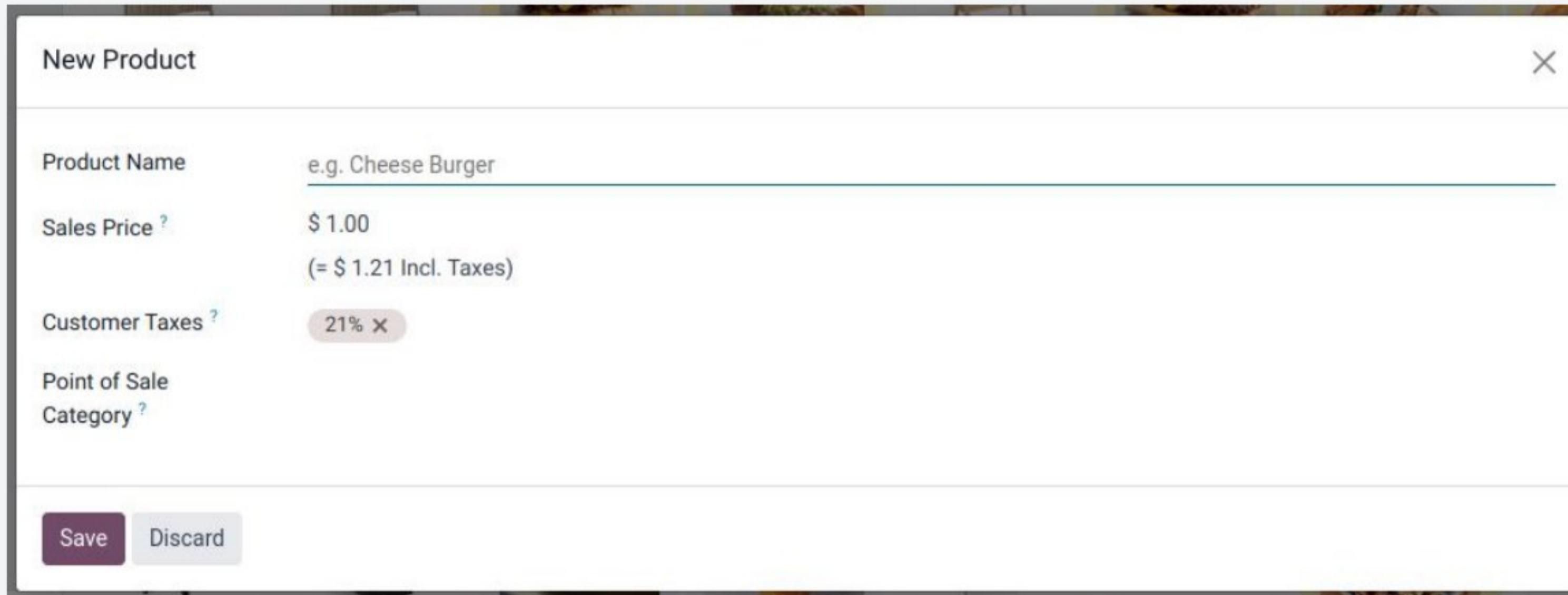
Save

Discard

# Point of Sale



# Backend views directly to frontend



The screenshot shows a 'New Product' form with the following fields and values:

Field	Value
Product Name	e.g. Cheese Burger
Sales Price ?	\$ 1.00 (= \$ 1.21 Incl. Taxes)
Customer Taxes ?	21% x
Point of Sale Category ?	

At the bottom of the form, there are two buttons: 'Save' (in a dark purple box) and 'Discard' (in a light grey box).

Create products without leaving PoS interface

*And barcode lookup!*

## *But also...*

- Free orders in PoS restaurant
- PoS events
- Product with variants displayed like in e-commerce
- New designs for better UX at login and payment screen

eCommerce



# New location selector widget

**Choose a pick-up point**

1367

- Station Avia**  
Chaussée De Namur 67
- Autre-Eglise**  
Rue De La Place 3
- Perwez**  
Avenue Wilmart 26
- Eghezee**  
Chaussée De Louvain 37
- Librairie Du Rond Point Thorembais**  
Chaussée De Charleroi 31B
- Total Eghezee**  
Route De Ramillies 6
- Librairie L'As-Tu Lu Jauche**  
Avenue Albert Drossart 3
- Orp-Jauche**  
Place De La Roulette 3
- Automaat Trafic Jodoigne**  
Rue De Septembre 5
- Jodoigne**  
Avenue Des Commandants Borlée 42
- Librairie De La Bruyere**  
Rue Saint-Jean 1
- Wasseiges**  
Rue De Merdorp 18

**1 Station Avia**  
Chaussée De Namur 67  
1367 Ramillies

Choose this location

Monday	07:00 - 18:30
Tuesday	07:00 - 18:30
Wednesday	07:00 - 18:30
Thursday	07:00 - 18:30
Friday	08:00 - 14:00 15:00 - 18:00
Saturday	09:00 - 16:00
Sunday	Closed

**Choose a pick-up point**

1367

List view Map view

- Station Avia**  
Chaussée De Namur 67  
Open now  
Opening hours
- Autre-Eglise**  
Rue De La Place 3  
Open now  
Opening hours
- Perwez**  
Avenue Wilmart 26  
Open now  
Opening hours
- Eghezee**  
Chaussée De Louvain 37  
Open now  
Opening hours
- Librairie Du Rond Point Thorembais**  
Chaussée De Charleroi 31B  
Open now  
Opening hours
- Total Eghezee**

Choose this location

**Choose a pick-up point**




1367

List view Map view

**1 Station Avia**  
Chaussée De Namur 67  
1367 Ramillies  
Open now  
Opening hours

Choose this location

# Sign in button in checkout form

**YourLogo** Home Shop Events Forum Blog Help Courses Appointment Jobs Contact us    +1 (650) 555-0111 [Sign in](#) [Contact Us](#)

Review Order > **Shipping** > Payment

Email Already have an account? [Sign in](#)

Be the first to find out all the latest news, products and trends

*Newsletter option*

**Fill in your address**

Full name

Phone

Company Name  VAT

Street and Number

Apartment, suite, etc.

City  Zip Code

Country

Ship to the same address

## ... And more

- **One page checkout**
- **Hide /shop page** for unknown customers
- **/shop and product pages** redesign
- Various **SEO** improvements
- Generate a **mega menu** based on ecommerce categories
- Allow **multiple warehouses** on a website and **display stock** quantity on the product page
- Improved **Click&Collect** flow
- **Order confirmation** before payment



# Inventory / Purchase



# Delivery dispatching

- order pickings in batch for delivery round
- assign vehicle to batch
- Map view of the batch

## Inventory Batch: form

Inventory Overview Operations Products Reporting Configuration

New Batch Transfers BATCH/00002 CMR Report

Validate Print Print Labels Cancel many2one Draft In progress Done

**BATCH/00002**

Responsible

Operation Type YourCompany: Delivery Orders

~~Company~~ My Company (San Francisco)

Scheduled Date 02/06/2024 15:29:01 optional end\_date (for gantt)

Map Add a button to open all delivery orders of the batch, in map view

Dock Dock A

Vehicle Opel 6J45XC1234  many2one: fleet\_vehicle\_id, non require Placeholder; Third Party Provider.

Vehicle Category Semi-Truck (250kg, 30m<sup>3</sup>)  many2one: fleet.vehicle.category placeholder: e.g. Semi-truck

Weight 140kg  30% invisible if no vehicle category

Volume 110m<sup>3</sup>  50%

Ability to add properties depending on operation type

Detailed Operations Operations Transfers

Reference	Scheduled Date	Source-Document Partner	Document ZIP	Carrier	Volume	Weight for Shipping	Batch Transfer	Company	Status
WH/OUT/00008	Today				110	110.00	BATCH/00002	My Company (San Francisco)	Ready
WH/OUT/00009	Today				10	30.00	BATCH/00002	My Company (San Francisco)	Ready
Add a line					110	140			

Add a batch\_sequence field, widget = drag\_handle (order of the pack in the truck)

Add sum="..." on these two columns

optional="hidden"

## Inventory Batch: Gantt



# Improved automated batches

- Allows to combine waves and batches

## Automatic Wave

Improve setting UX on stock.picking, and allow the creation of wave pickings

~~BATCH TRANSFERS~~ Batch & Wave Picking

Automatic Batches ?	<input checked="" type="checkbox"/>
<del>Batch by Grouping</del>	<input type="checkbox"/> Contact ? <input type="checkbox"/> Carrier ? <input type="checkbox"/> Destination Country ?
Wave Grouping	<input type="checkbox"/> Product <input type="checkbox"/> Category <input type="checkbox"/> Location
	<input type="checkbox"/> if products partially available <input checked="" type="checkbox"/> v
Maximum <del>lines</del> per batch ?	0 lines
<del>Maximum transfers per batch ?</del>	0 transfers
<del>Maximum weight per batch ?</del>	0 kg
Auto-confirm	<input checked="" type="checkbox"/>

if Locations checked, add a many2many\_tags bellow:  
Wave Locations \_\_\_\_\_v

So, if you set WH/stock, and WH/stock2 and WH/stock/cold, the following groups will be done

1. WH/stock & WH/stock/loc1/locB -> description WH/stock
2. WH/stock/cold/A & WH/stock/cold/B/C/D -> description WH/stock/cold
3. HH/stock2/... ->description WH/stock2

fully available  
partially available

only visible if one of the wave grouping

closer to input

# Better putaways

- Can send products where they already are/were

## Putaway Rules

Note: closest is the current one.

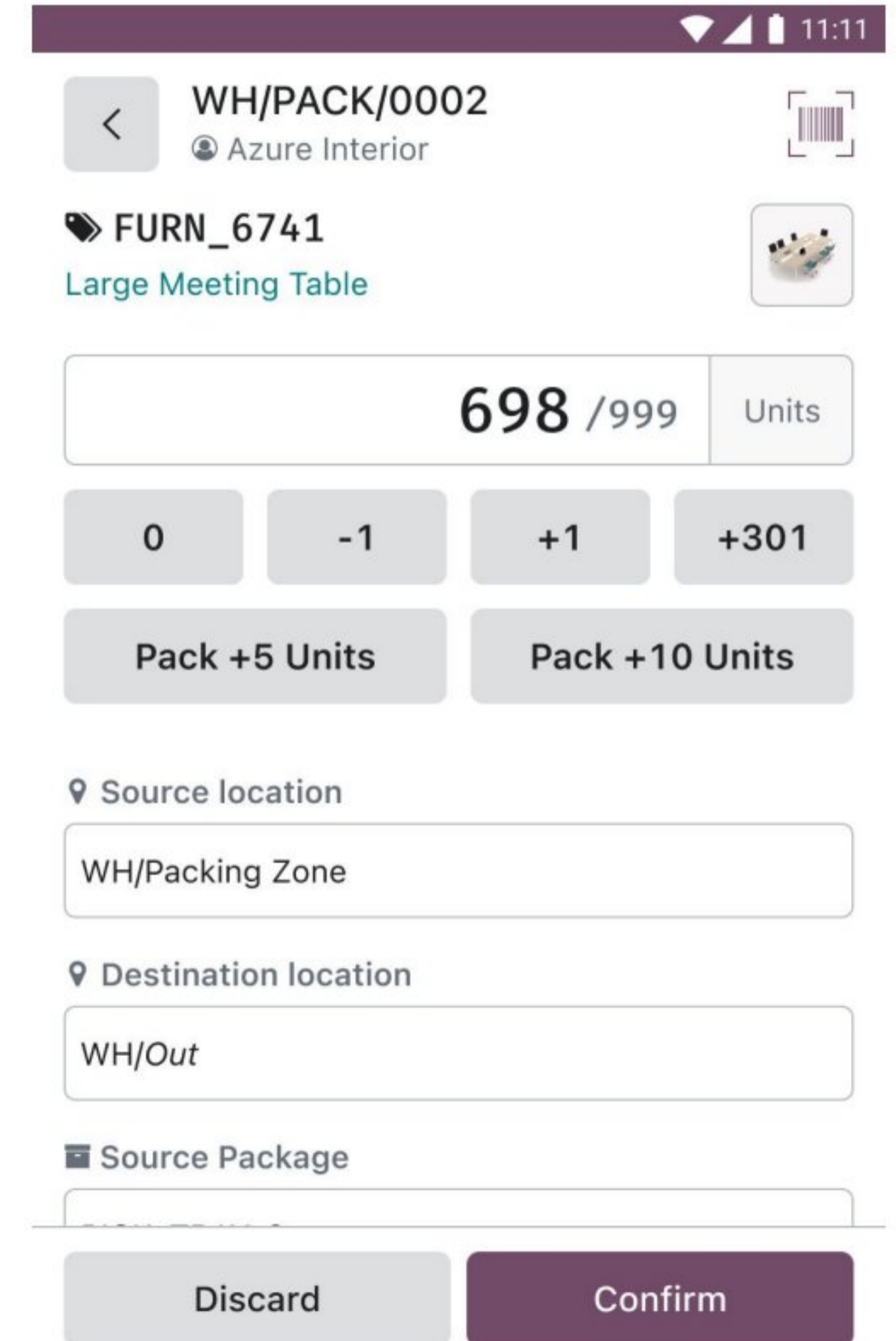
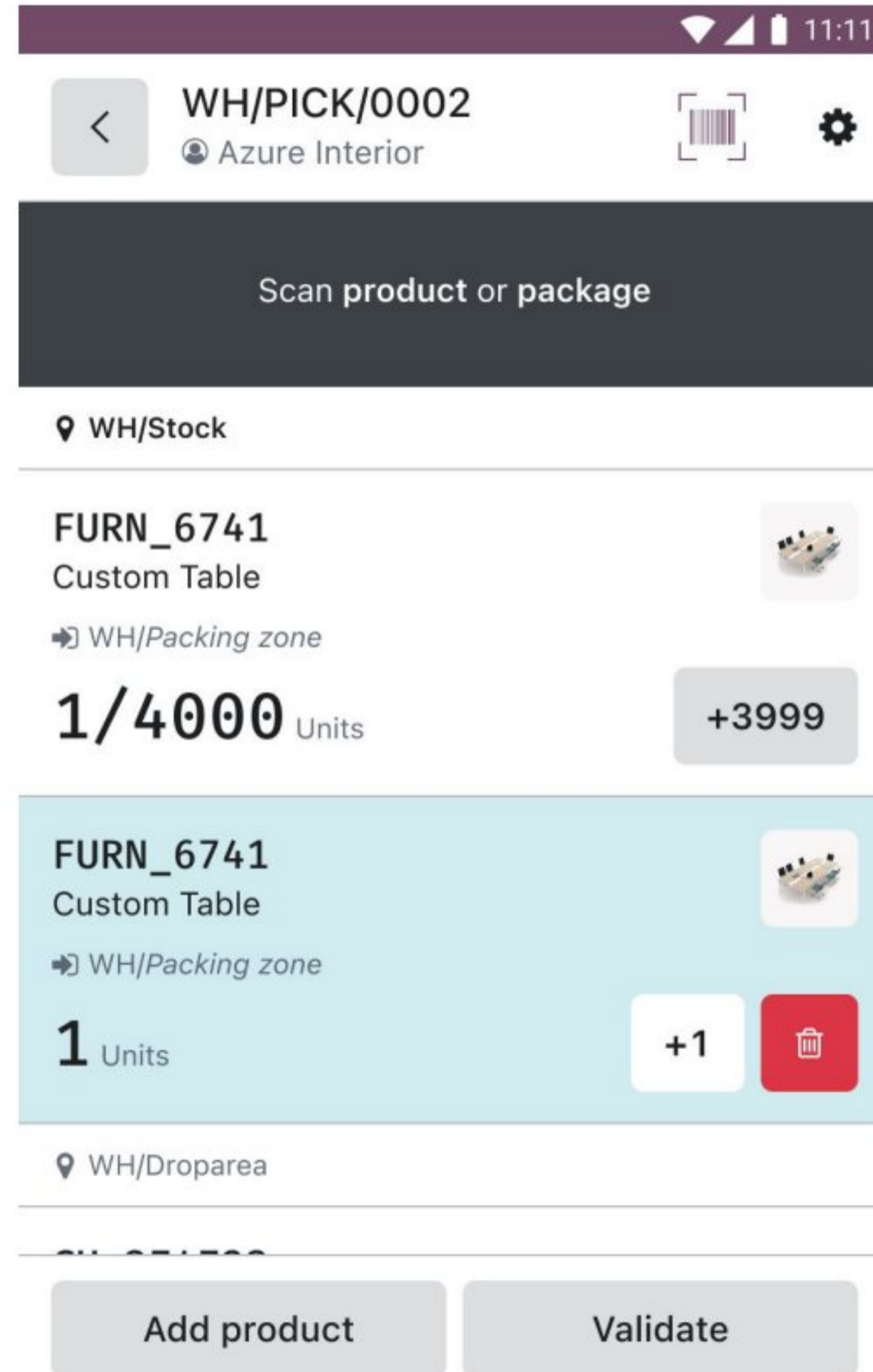
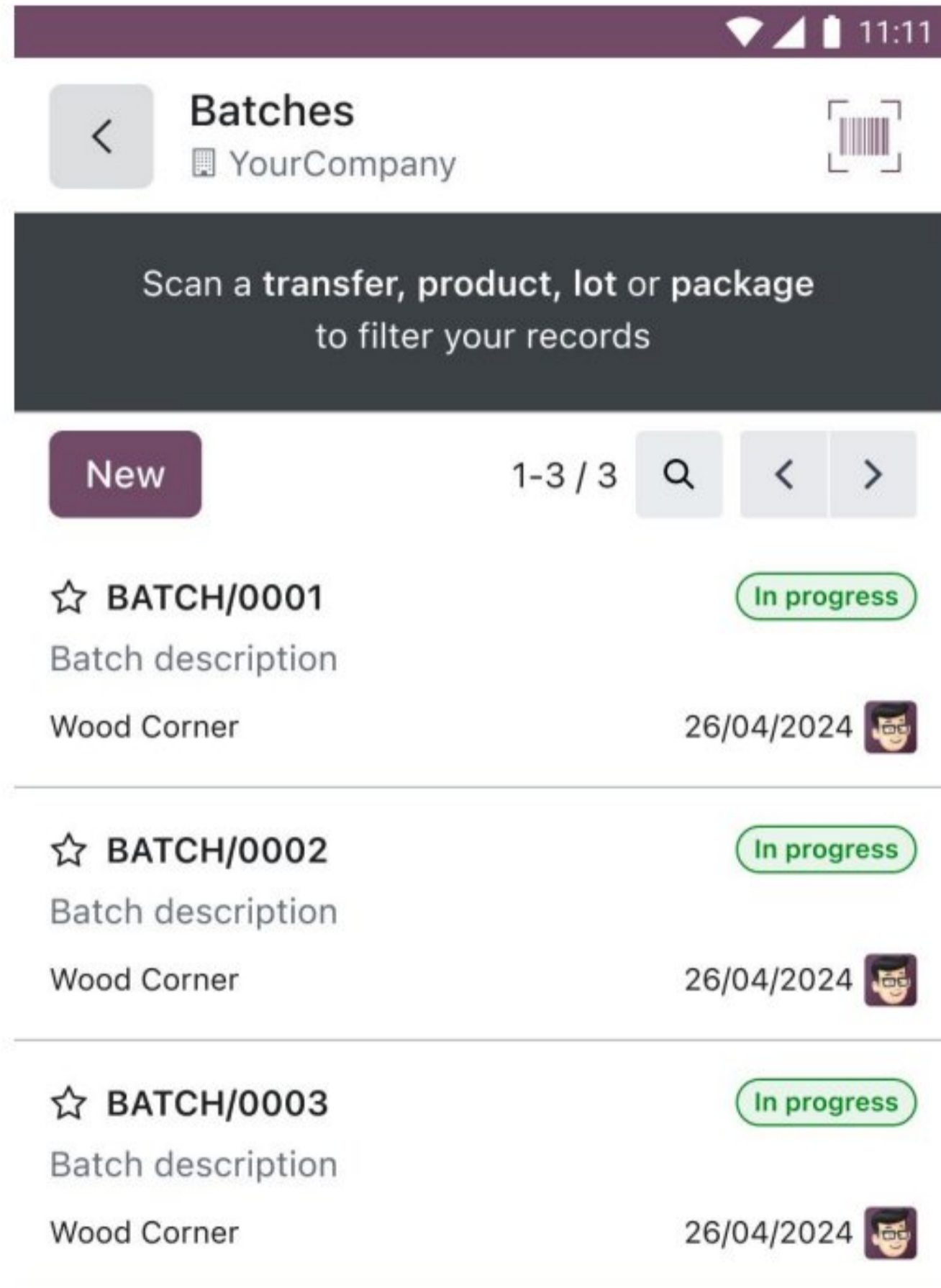
<input type="checkbox"/>	When product arrives in	Product	Product Category	Store to <del>sublocation</del>	Sublocation	Having Category	Company
<input type="checkbox"/>	WH/Stock	[CONS_0002] Simple Pen		WH/Stock/Shelf 2	Last used	Low frequency - Big	My Company (San Francisco)
<input type="checkbox"/>	WH/Stock	Placeholder: All Products	Placeholder: All Categories	WH/Stock	Closest		My Company (San Francisco)
					No		

invisible IF sublocation=no

default to No

Allow to do a rule without Product & Category

# Revamped barcode app



# And more...

## Inventory

- Valuation by lots
- Inter-company lots/SN
- New push rules and flexible routes
- MTSO: MTO that can pick a part in the stock and procure the remaining
- Package content report contains QR code with all serials inside
- Allow to scan QR code containing mass data.

## Barcode

- Hide reserved lots/serials
- Hide theoretical quantity in inventory adjustments
- Forbid users to add products not in the picking
- Aggregate lines of same products in batches
- Barcode app can be installed as a PWA on mobile devices
- Sign deliveries
- Sound when scan was OK

... And more...

## Purchase

- Down payments
- Purchase templates
- Structured data(UBL) stored in the pdf RfQ/PO for easy import in sales
- Merge RfQs manually
- Improved reports

## Shipping

- Shipping methods availability per weight, volume, and/or product tags
- New shipping connectors for Fedex, DHL and USPS.
- Improved Fedex, DHL and UPS
- Better pickup point selection, in backend and frontend, for compatible connectors

 MRP





# MPS Updates

Manufacturing Overview Operations Planning Products Reporting Configuration

Order Add a Product Master Production Schedule

To Forecast X Search...

	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024
<input type="checkbox"/> [FURN_7800] Desk Combination by Units	60	5	5	5	5	5	5
- Forecasted Demand	240	0	0	0	0	0	0
+ Replenishment: Order	185	0	0	0	0	0	0
= Forecasted Stock @ 5	5	5	5	5	5	5	5
<input type="checkbox"/> [FURN_0269] Office Chair Black by Units	10	15	15	15	15	15	15
- Forecasted Demand	365	0	0	0	0	0	0
- Indirect Demand Forecast	185	0	0				
+ Replenishment: Order	555	0	0				
= Forecasted Stock @ 15	15	15	15	1			

## Automatic Replenishment + Flexible Route

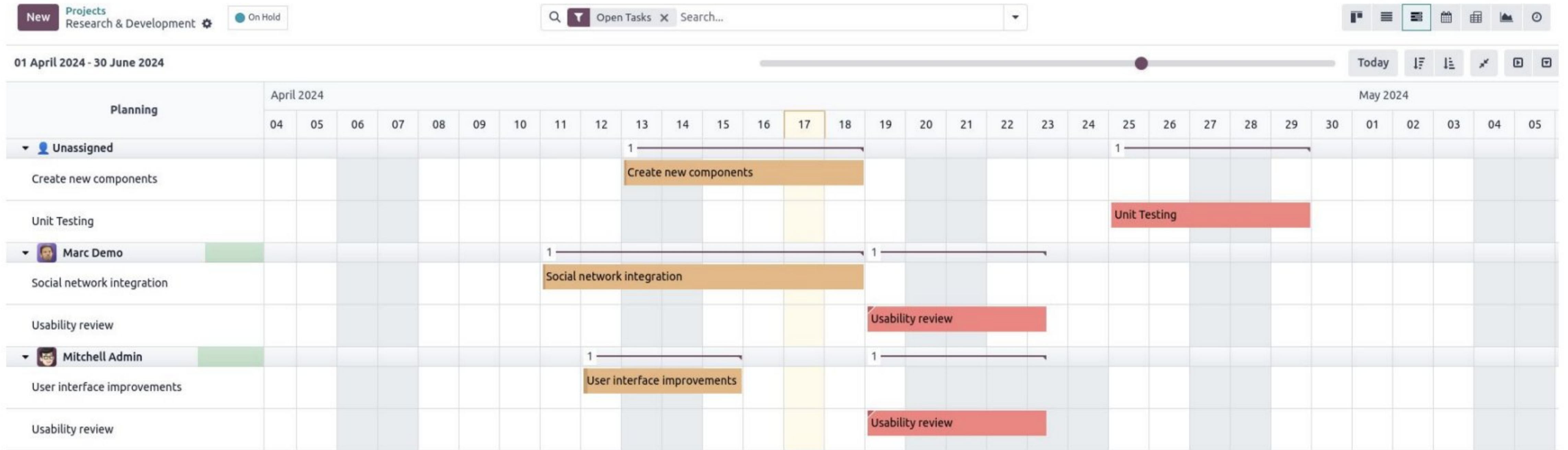
## UI Revamp

### Edit Production Schedule

Product	[FURN_7800] Desk Combination	Safety Stock Target ?	5.00	Units
Bill of Materials	[FURN_7800] Desk Combination	Minimum to Replenish ?	0.00	Units
Route ?	Manufacture	Maximum to Replenish ?	<input type="checkbox"/> No Maximum	
		Trigger ?	Replenish manually	

Save Cancel

# Gantt view improvements



zoom in/out, scroll horizontally, view one task per line and much more!


# On-Demand Quality Checks


The screenshot displays a software interface for inventory management. At the top, there are navigation tabs: Inventory, Overview, Operations, Products, Reporting, and Configuration. The current view is 'Inventory Overview / YourCompany: Receipts' for item 'WH/IN/00007'. A red arrow points from the gear icon next to the item ID to a modal dialog box titled 'On-Demand Quality Check'. The dialog box contains a 'Product' dropdown menu and a 'Quality Check Point' text input field. A 'Confirm' button is located at the bottom left of the dialog. The background interface shows a 'Validate' button, a 'Record comments' button, and a 'Quality Checks' button. The status bar at the bottom right indicates 'Draft', 'Ready', and 'Done' stages.


# Shop Floor Improvements

All MO 2 | My WO 0 | Assembly 1 1


WH/MO/00003 - Manual Assembly  
[FURN\_8522] Table Top - 1 Units

!! Custom Signature !! 

Worksheet 

Register Production 


[FURN\_7023] Wood Panel 2 Units

Mark as Done 


Add Notes


All MO 3 | My WO 0 | Assembly 1 2 | Drill 1 0 | Assembly 2 0 +


WH/MO/00010 - Assembly  
[D\_0045\_B] Stool (Dark Blue) - 1 Units


Instructions (1/8) 


Generate Serial Number 0000002


Parts 


Stool Lot (Dark Blue) 

Assembly 


Print Label 


Picture 

Quality Check 

Buckle test 

WH/MO/00011 - Assembly  
[FURN\_9666] Table - 1 Units


Worksheet 


Instructions (0/9) 

Fold/Unfold Instructions

All MO 1 | My WO 0 | Assembly 1 0

WH/MO/00012 - Packing  
[FURN\_8855] Drawer - 5 Units

Worksheet 

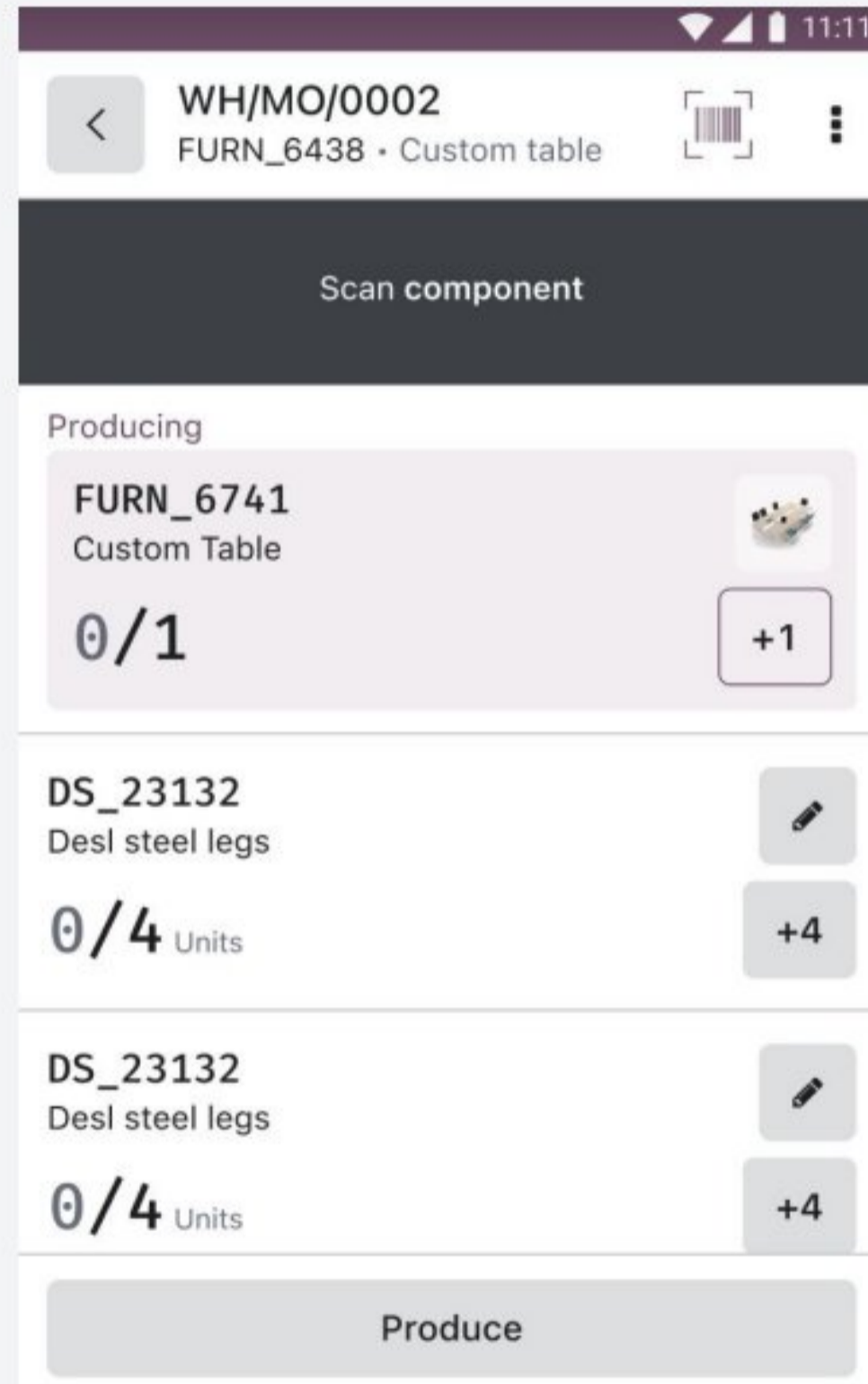
Register Production 

Undo

Next Operation

Next Operations

# And more...



- Project & MO Link
- Quality and multi step for Repair Orders
- Repair for Rental Returns
- MRP Documents Refactor
- Product Catalog for BOM, MO, Repair
- Mass Produce Redesign
- Work in Progress Management...



# Services



# Top bar to browse related project records

The screenshot displays a project management interface. At the top, a navigation bar is highlighted with a red box, containing tabs for 'Tasks', 'Project Updates', 'Timesheets', 'Planning', 'Documents', 'Sales Orders', and 'Invoices'. Below this, the main workspace is divided into columns: 'New' (5 items), 'In Progress' (3 items), and 'Done' (3 items). Each column contains task cards with details such as task name, assignee, and status. A search bar and utility icons are also visible in the top right.

**Navigation Bar:** Tasks | Project Updates | Timesheets | Planning | Documents | Sales Orders | Invoices | +

**Project Info:** New Projects / AGR - S00080 - Sales Order

**Search:** Open Tasks x Search...

**Columns:**

- New (5):**
  - Kitchen Assembly (Deco Addict, Cabinets)
  - Furniture Delivery (Manual) (Deco Addict)
  - Kitchen Assembly (Milestones) (Deco Addict)
  - Junior Architect (Invoice on Timesheets) (Deco Addict, 10:00)
  - Senior Architect (Invoice on Timesheets) (Deco Addict, 15:00)
- In Progress (3):**
  - Furniture (Deco Addict, Preparation and Delivery Phase)
  - Junior Architect (Invoice on Timesheets) (Deco Addict, 03:00)
  - Senior Architect (Invoice on Timesheets) (Deco Addict, 05:00)
- Done (3):**
  - Planning (Deco Addict, Preparation and Delivery Phase)
  - Decoration (Deco Addict)
  - Senior Architect (Invoice on Timesheets) (Deco Addict, 00:00)

**Utility Icons:** Eye, Full Screen, List, Calendar, Location, Grid, Chart, Refresh

# Find the right people based on their skills

New All Tasks ⚙ Skills french × Search... ⌵

Today ← Week → 28 April 2024 - 04 May 2024

Planning	Sunday, 28	Monday, 29	Tuesday, 30	Wednesday, 1	Thursday, 2	Friday, 3	Saturday, 4
Unassigned	4/26 - 4/30 - Unit Testing				8:00 AM - 5:00 PM (8h) - 3-port ... 8:00 AM - 5:00 PM (8h) - Bathro...		
Eli Lambert		8:00 AM - 5:00 PM (8h) - Table l...					
Marc Demo	4/23 - 4/29 - Document management						
Mitchell Admin	4/23 - 4/29 - Document management		8:00 AM - 5:00 PM (8h) - Boiler ...	8:00 AM - 5:00 PM (8h) - Want t...			



# Tracking revisions in tasks

The screenshot displays the Odoo project management interface for a task named "Kitchen Assembly". The main task description is visible in the background, showing a paragraph of Lorem Ipsum text. A modal window titled "Task Description History" is open, showing a list of revisions. The first revision is dated "04/17/2024 14:34:58" and is by "Mitchell Admin". The second revision is dated "04/17/2024 14:33:53" and is also by "Mitchell Admin". The modal window has two tabs: "Content" and "Comparison". The "Content" tab is selected, showing the text of the revision. The "Comparison" tab is also visible. At the bottom of the modal window, there are two buttons: "Restore history" and "Discard".

Project: AGR - S00080 - Sales Order  
Kitchen Assembly

Start

Kitchen Assembly

Project: AGR - S00080 - Sales Order  
Milestone: Cabinets  
Assignees: Mitchell Admin

Tags

Description Timesheets Sub-tasks

Task Description History

04/17/2024 14:34:58 Mitchell Admin

04/17/2024 14:33:53 Mitchell Admin

Content Comparison

Content: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Comparison: Et odio pellentesque diam volutpat commodo sed egestas. Quisque egestas diam in arcu cursus euismod quis. Volutpat sed cras ornare arcu dui vivamus arcu felis. Vehicula ipsum a arcu cursus vitae congue mauris rhoncus. Justo eget magna fermentum iaculis eu. Eleifend quam adipiscing vitae proin sagittis nisi. Vestibulum mattis ullamcorper velit sed ullamcorper morbi tincidunt ornare. Lorem sed risus ultricies tristique nulla aliquet. Dictum varius dui at consectetur lorem. Id semper risus in hendrerit gravida. Et malesuada fames ac turpis egestas. Nunc faucibus a pellentesque sit amet porttitor eget. Leo dui ut diam quam. Commodo viverra maecenas accumsan lacus vel facilisis volutpat est velit. Vulputate ut pharetra sit amet aliquam id diam maecenas ultricies. Gravida in fermentum et sollicitudin ac. Porttitor eget dolor morbi non arcu.

Restore history Discard

https://61400384-master-all.runbot181.odoo.com/odoo/project/16/tasks/118?cids=1#

# Products under warranty

New My Tasks  
Replace defective shower head ⚙️

4 Products \$0.00 \$ Sales Order Worksheet

Start Sign Report Send Report Mark as done

New 8d Planned In Progress Done ...

## ★ Replace defective shower head

In Progress

Project Field Service  
Worksheet Template ? Device Installation and Maintenance

Customer Ready Mat, Travis Mendoza  
7500 W Linne Road  
Tracy CA 95304  
United States

Assignees

→ View Itinerary

Under Warranty ?

Phone (840)-944-8661

Sales Order Item ? Non-billable

Planned Date 04/09/2024 17:00:00 → 04/09/2024 18:00:00

Allocated Time 00:00 (0%)

Tags

Description Timesheets Sub-tasks

Add details about this task...

... And more!

## Field Service

- Planning by **location**
- Integration with **Maintenance**
- Cost of products in **analytic accounting**

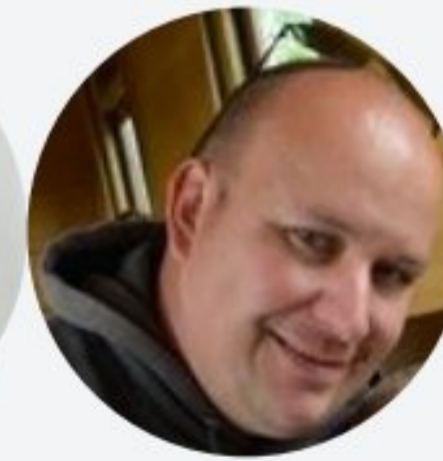
## Helpdesk

- suggestion of **similar tickets** to support agents
- suggestion of relevant **documentation** to customers when they are **submitting tickets**

## Planning

- **availabilities** are taken into account when generating **recurring** shifts

# Accounting



# A new Invoicing for Enterprise!

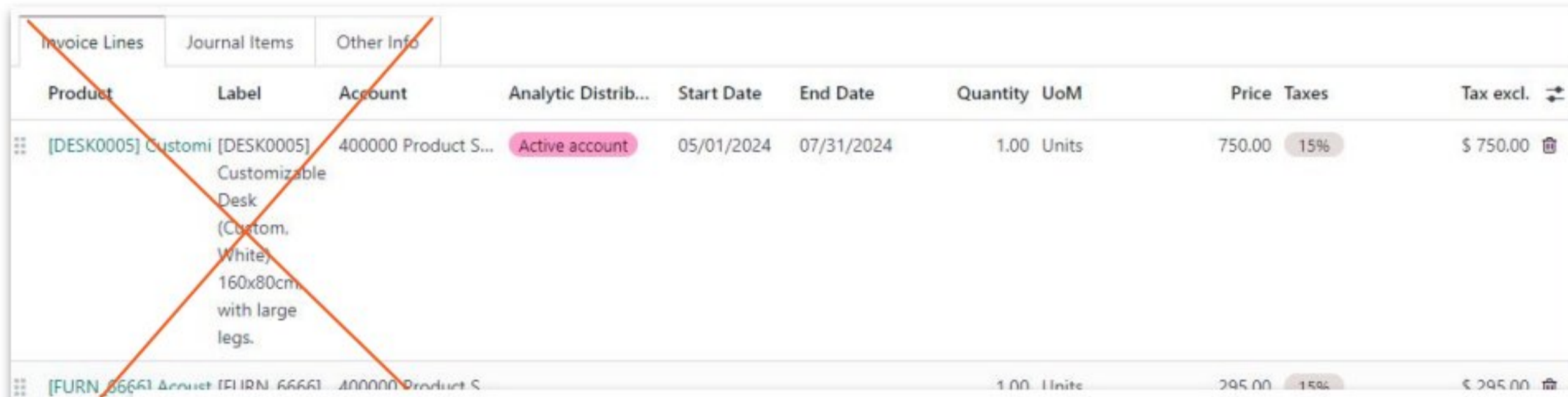
- Same Dashboard
- Easier onboarding
- More features

The screenshot displays the 'Invoicing' dashboard with a navigation menu at the top: Invoicing, Dashboard, Customers, Vendors, Reporting, and Configuration. The main content is divided into four sections:

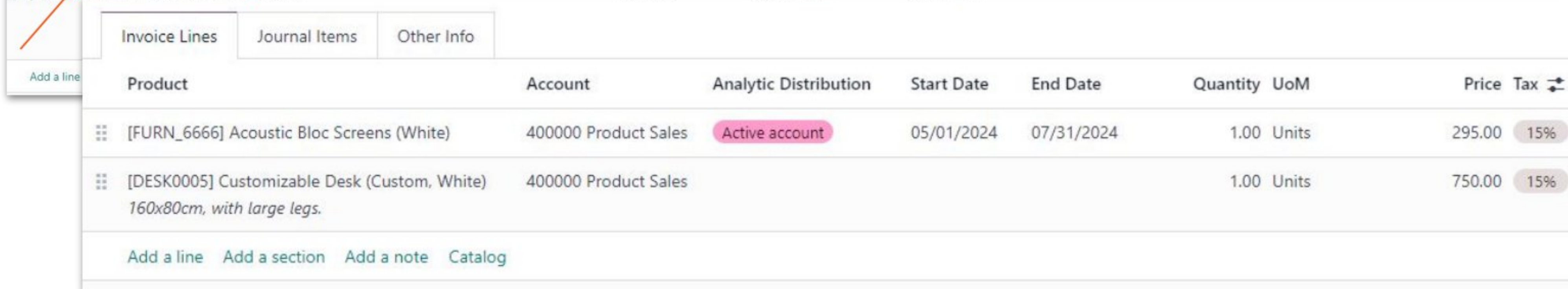
- Customer Invoices:** Features a 'New Invoice' button and a bar chart showing invoice status over time. The x-axis categories are: Due, 12 - 18 May, This Week, 26 May - 1 Jun, 2 - 8 Jun, and Not Due.
- Vendor Bills:** Includes an 'Upload' button and two options: 'Drag & drop or try our sample' (with a folder icon) and 'Create a bill manually' (with a bill icon).
- Bank:** Offers to 'Search over 36 000 banks' and displays a grid of bank logos including PayPal, Santander, Citigroup, and others. A 'Record transactions manually' link is at the bottom.
- Cash:** Contains a 'New Transaction' button and a line graph showing cash flow trends.

# Invoice edition

- Product & description in one column
- Layout configuration preview
- Tax selection guide



Product	Label	Account	Analytic Distrib...	Start Date	End Date	Quantity	UoM	Price	Taxes	Tax excl.
[DESK0005] Customi	[DESK0005] Customizable Desk (Custom, White) 160x80cm, with large legs.	400000 Product S...	Active account	05/01/2024	07/31/2024	1.00	Units	750.00	15%	\$ 750.00
[FURN_6666] Acousti	[FURN_6666] Acoustic Bloc Screens (White)	400000 Product S...				1.00	Units	295.00	15%	\$ 295.00



Product	Account	Analytic Distribution	Start Date	End Date	Quantity	UoM	Price	Tax
[FURN_6666] Acoustic Bloc Screens (White)	400000 Product Sales	Active account	05/01/2024	07/31/2024	1.00	Units	295.00	15%
[DESK0005] Customizable Desk (Custom, White) 160x80cm, with large legs.	400000 Product Sales				1.00	Units	750.00	15%

Add a line   Add a section   Add a note   Catalog

# Lock dates

- Wizard revamp
- Hash on send rather than on post or on demand

## Lock Date Alternative

change the lock date wizard; no more lock per role, only per type of operations.

### Lock Journal Entries ✘

Lock transactions up to specific dates, inclusive.

Lock Sales	<u>Not locked</u>	to lock invoices
Lock Purchases	<u>Not locked</u>	to lock bills
Lock Tax Return	<u>Not locked</u>	after a tax closing
Lock Everything	<u>Not locked</u>	but allow exceptions
Hard Lock	<u>Not locked</u>	to ensure inalterability

block sales journal

block vendor journal

Apply

Discard

# Reconciliation : Kanban quick create

Accounting Dashboard Customers Vendors Accounting Reporting Configuration

My Company (San Francisco)

Accounting Dashboard Bank Reconciliation

Journal Bank X Search...

1-8 / 8

Balance **\$ 9,944.87**

05/07/2024 0.00 USD

Only in multicurrency  
Default is journal currency

Add & New Add & Close

Account	Partner	Date	Debit	Credit
101401 Bank		05/07/2024	\$ 96.67	
400000 Product Sales		New		\$ 100.00
500000 Cost of Goods Sold		New	\$ 3.33	

Match Existing Entries Batch Payments Manual Operations Discuss

Search...

Account	Partner	Date	Journal Entry	Label	Open Amount in Currency	Open Amount
211000 Account Payable	Azure Interior	05/07/2024	RBILL/2024/05/0001		\$ 34.50	\$ 34.50
101403 Outstanding Receipts		05/07/2024	PBNK1/2024/00002 (Combine Ba...	Customer Payment \$ 34.70 - 05/0...	\$ 34.70	\$ 34.70
101403 Outstanding Receipts		05/07/2024	PBNK1/2024/00001 (Combine Ba...	Customer Payment \$ 21.00 - 05/0...	\$ 21.00	\$ 21.00
121000 Account Receivable	test	05/07/2024	INV/2024/00025	INV/2024/00025	\$ 17.25	\$ 17.25
121000 Account Receivable	YourCompany, Joel Willis	05/07/2024	INV/2024/00024 (subscription_p...	INV/2024/00024	\$ 80.50	\$ 80.50
121000 Account Receivable	YourCompany, Joel Willis	05/07/2024	INV/2024/00023 (subscription_p...	INV/2024/00023	\$ 207.00	\$ 207.00
211000 Account Payable	My Belgian Company	05/07/2024	BILL/2024/05/0002		\$ -12,500.00	\$ -12,500.00
211000 Account Payable	Azure Interior	05/07/2024	BILL/2024/05/0001		\$ -34.50	\$ -34.50

Date	Description	Amount
05/07/2024	R:9772938 10/07 AX 9415116318 T:5 BRT: 100.00 C/ crop	\$ 96.67
05/07/2024	Deco Addict INV/2024/00002	\$ 750.00
05/07/2024	Last Year Interests	\$ 102.78
05/07/2024	Azure Interior First \$ 2,000.00 of invoice 2024/00001	\$ 2,000.00
05/07/2024	Azure Interior Prepayment	\$ 650.00
05/07/2024	Bank Fees	\$ -32.58
Bank - 2024-01-01/1		\$ 6,378.00
01/01/2024	Azure Interior INV/2024/00002 and INV/2024/00003	\$ 1,275.00
01/01/2024	Initial balance	\$ 5,103.00

Go to Backend



# ... And more!

## Invoicing

- **Send / Print** UX
- **Duplicates** detection
- New Invoice **layouts**
- Invoice document preview "**Pop-out**"
- **Peppol** improvements

## Banks

- Improved UX for **Bank synchronization**
- More **providers**
- **Credit card** management
- Improved **Batch Payments** matching
- **Payment initiation**

## Reports

- **Annotations** revamped
- **Journal report** update
- **Date selection** improved
- Financial **budgets**

# ... And more more!

## Analytic

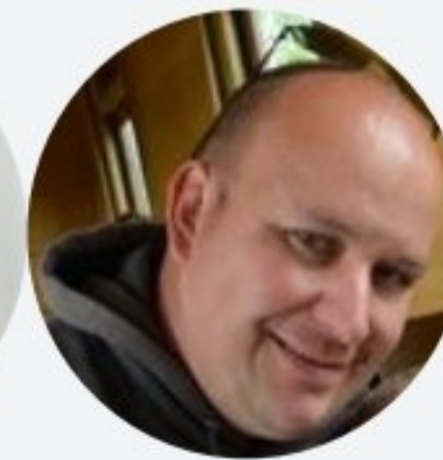
- Analytic **Budgets**
- Distribution **Models Combination**

## Miscellaneous

- **Intercompany** transactions
- Improved **Asset** management & import
- Automated **entries naming**
- **Email alias** on Misc journals

- Improved link with **Documents app**
- Improved **Expenses** integration

# Localizations





# Our 19 offices



# Our approach

## 1/ Basic package

- COA
- Default settings
- Fiscal Positions
- Taxes & Tax report
- Financial statements

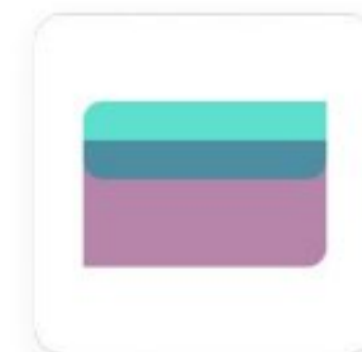
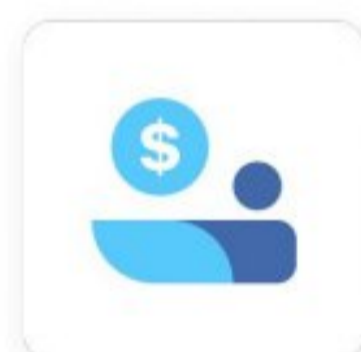
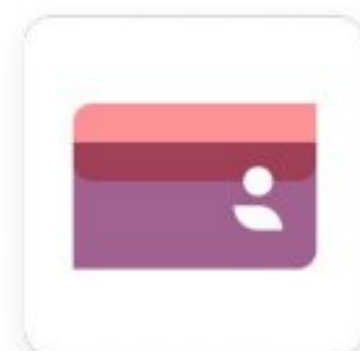
## 2/ Model updates

- Additional fields on invoice, product, partner, etc.
- Additional values in existing fields

## 3/ Specific features

- Electronic invoicing
- Country specific reports, model or workflow

# Localizations : More than **Accounting**



 HR / Payroll





# Attendances

- Report on Over time
- Management of fingerprints
- New Onboarding

The screenshot shows a web application interface for attendance management. At the top, there are navigation tabs: "Attendances", "Overview", "Kiosk Mode", "Reporting", and "Configuration". A search bar contains "Employee" and "Search...". A notification bar on the right says "Pending Activation". Below the navigation is a date selector for "Friday, April 19, 2024" and a time grid from 12am to 11pm. The name "Geoffrey Margraff" is written in red next to the 12am slot. A red arrow points from a handwritten note to this slot. The note says "grey is not supposed to work (based on workingn schedule or time off)". In the center, there is a section titled "Ready to track attendances?". It features two options: "Try the kiosk" with an image of a tablet displaying a kiosk interface, and "Try the top • icon (e.g. work from home)" with an image of a status card showing "Arrivée" and a red dot icon. A red arrow points from a handwritten note to the red dot icon, with the note "Animated: change of status". Below these options is a red line with "or" in the middle. At the bottom, there is a button "Load Sample Data" and a "Go to Backend" button.

grey is not supposed to work (based on workingn schedule or time off)

Ready to track attendances?

Try the kiosk

Try the top • icon (e.g. work from home)

Animated: change of status

or

Try the backend and reporting:

Load Sample Data

Go to Backend

# Recruitment

- *Jobs menu on Website*
- *Onboarding rewritten*
- *Regex to parse job boards incoming emails*
- *Post on Job Boards directly (Monster) - work in progress*
- *Conditional questions on the website for each job position*
- *Populate job position from applicant's pool based on Skills*

# *Time Off*

- *Remove Active fields from Time Off & Allocations*
- *Performance improvement*
- *Display of pending allocations requests*
- *Display the working hours in the Calendar*
- *Approve directly from Overview screen*
- *Option to include/exclude Public Holidays*
- *Option to hide/show Time off types from the Dashboard*

... And more!

## Appraisals

- Definition of **Templates**
- **Next Appraisal Date** on public profile
- New **Onboarding**

## Lunch

- Order for **other dates**

## Referrals

- Refer jobs by **SMS**
- Create a **referral campaign** from Recruitment

# ... And more more!

## Approvals

- New **Automation** options
- Select your **Vendor** in **RFQ approvals**

## Fleet

- **Autonomy** on models
- Contact **multiple** drivers

## Employee

- **Department visibility** by managers
- **Presence** Rework
- Request signatures from **multiple** employees
- **Automate** employees avatar

# ... And Payroll

## Engine

- **Property** fields on the complete flow
- Global **csv export** for banks
- **Headover** report
- **Editable** warnings on dashboard

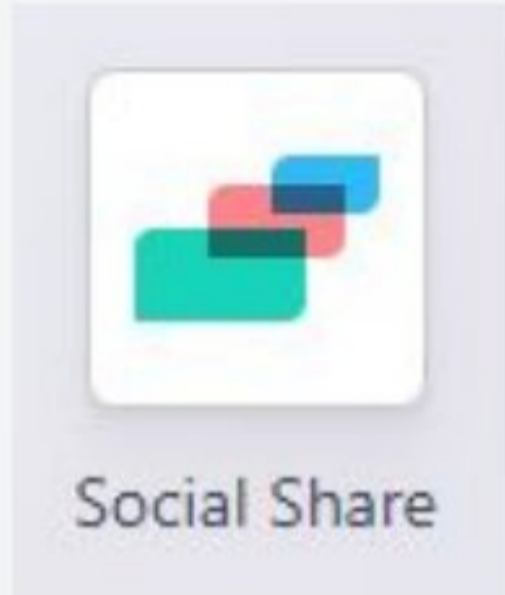
## L10N

- **Lot of improvements on existing localizations**
  - Belgium, Luxemburg, Kenya, US, U.A.E.
- **New huge features**
  - Australia
  - Switzerland
- **Next on the roadmap**
  - Mexico, Spain, Germany, Indonesia

# CRM & Marketing



# *A brand new app!*



Take advantage of your communities to promote your content.

Send them a card they'll be able to post online with a click.

# *Better WhatsApp tools*

WhatsApp added in a lot of flows (Inventory, Marketing

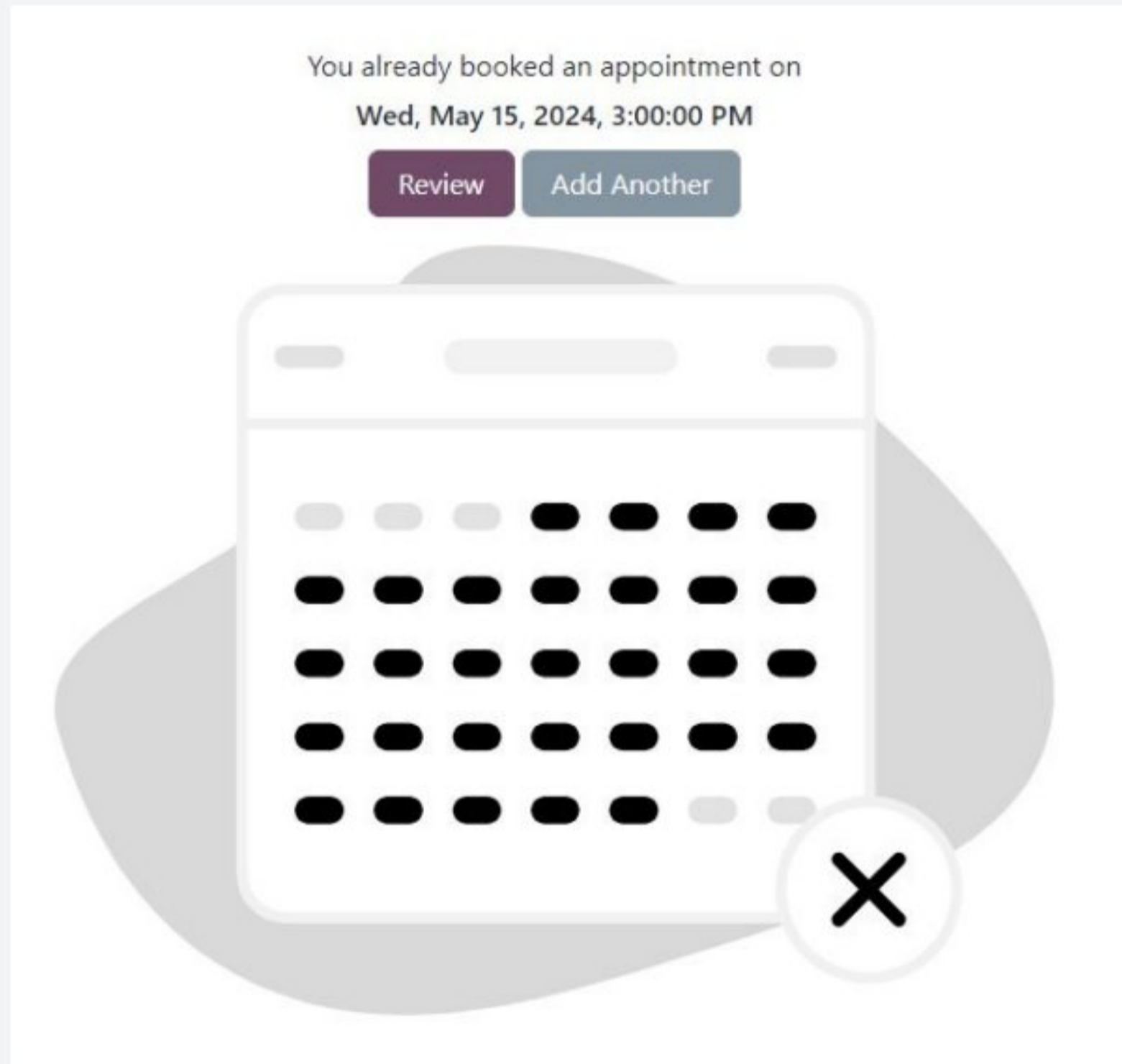
Automation, ...)



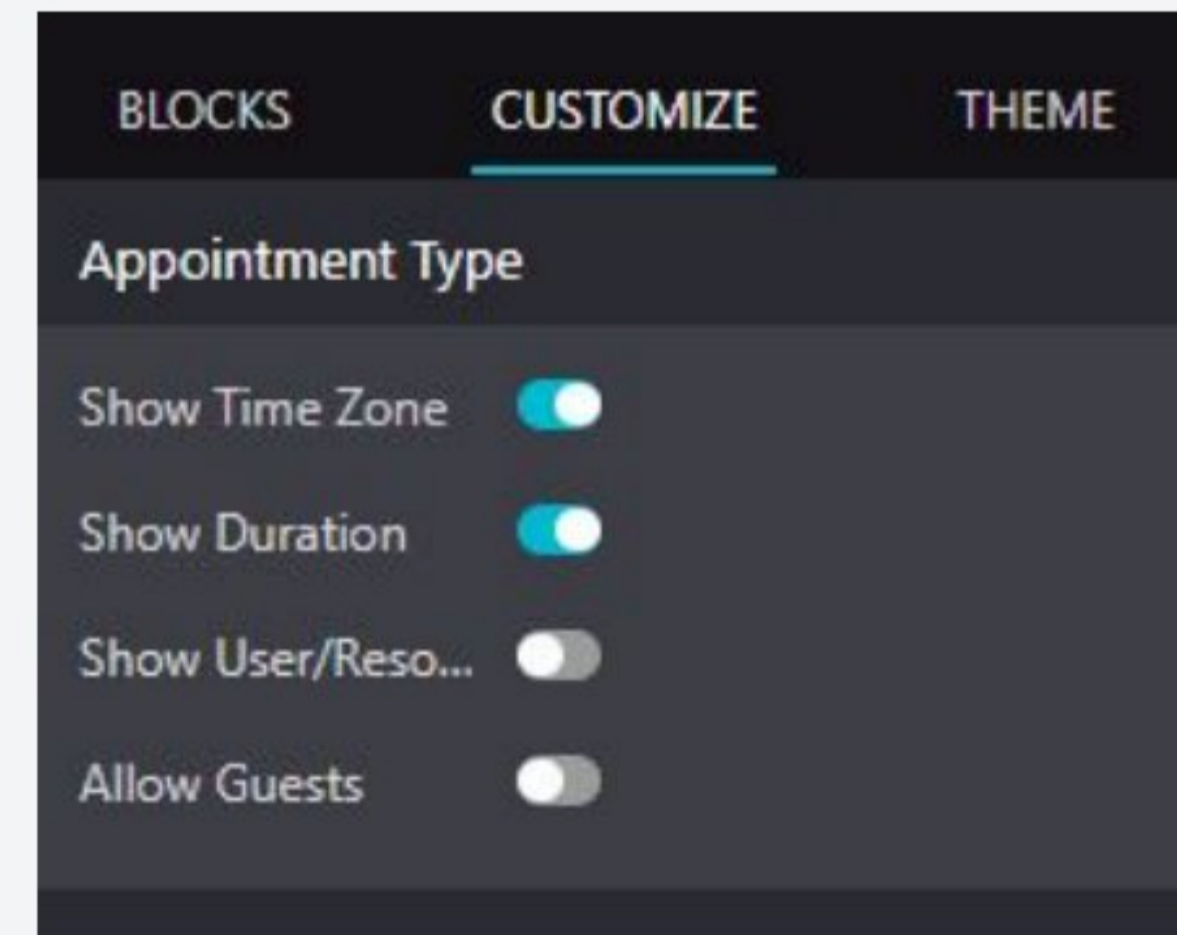


# Appointment

- Catch double-bookings



- Pay per seat  
Compute the booking price based on how many seats have been booked
- Customize your pages



... and many other improvements!

## *But also...*

- A lot of Social Improvements
- Design your Marketing opt-out page
- Define the visibility of your Event (via a link public or logged users only)
- See who clicked in your Mailings
- Better Mail Composer
- New Marketing Automation onboarding
- Easier Mail Server configuration

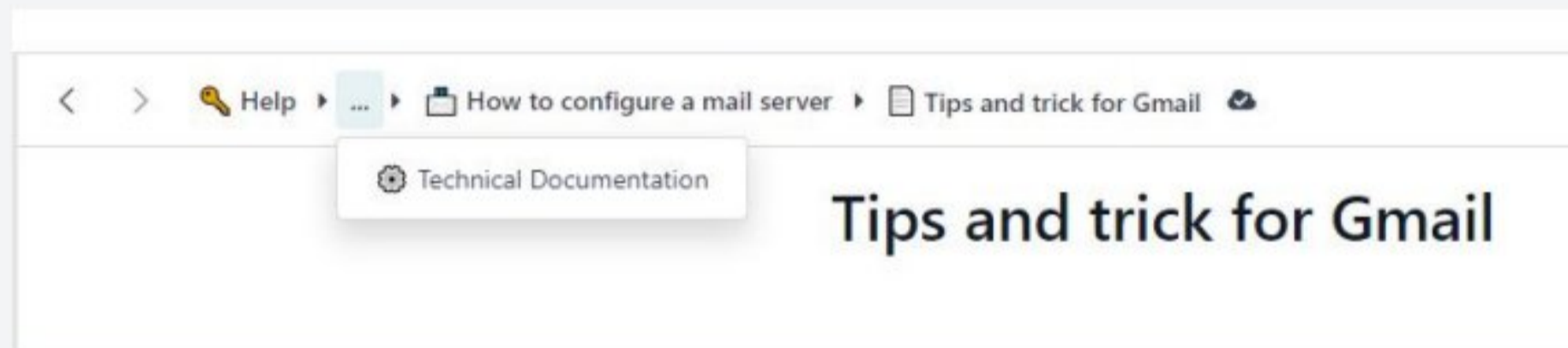
... and a ton of other improvements!

 Knowledge

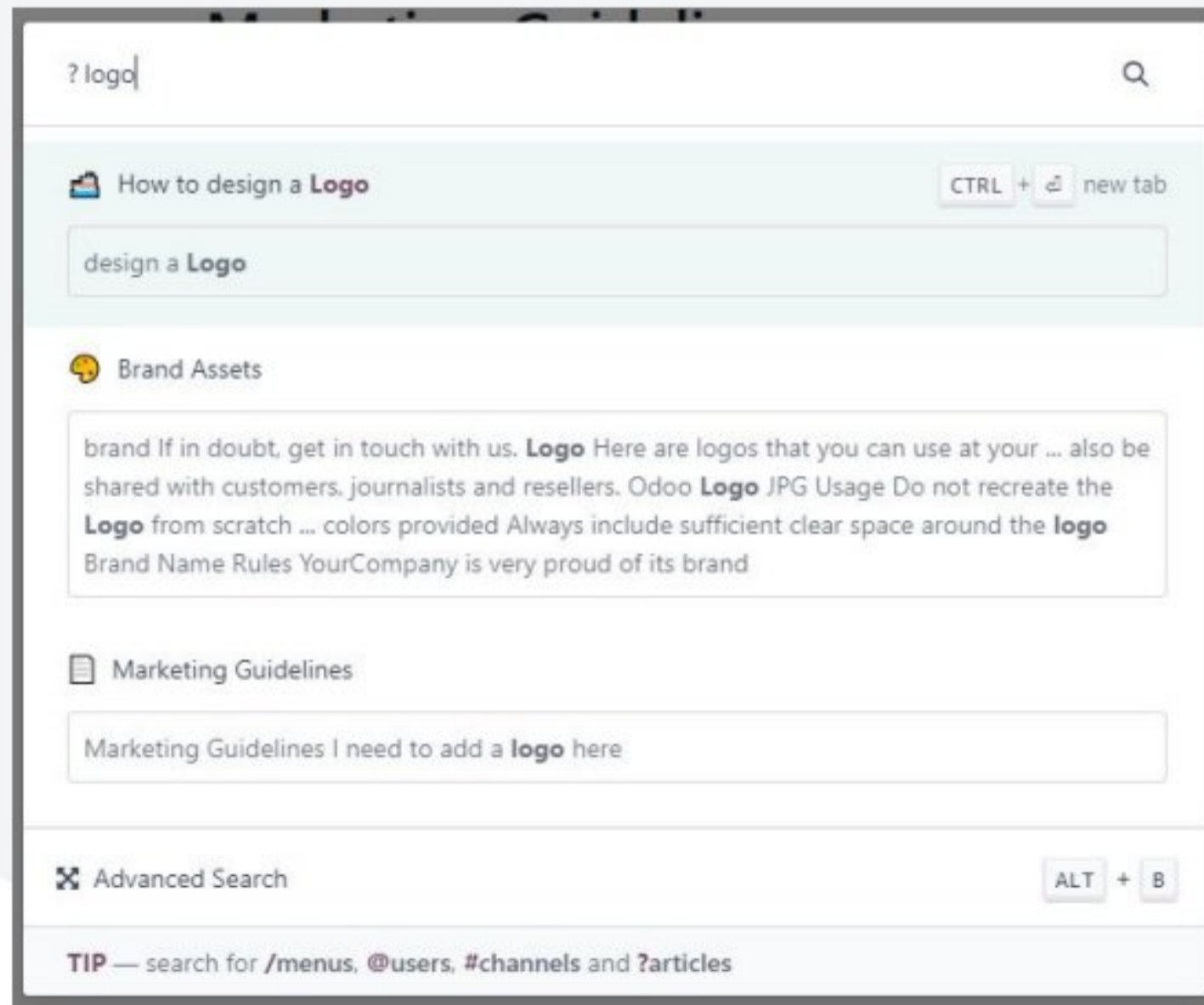


# Knowledge made easier

- Clearer Navigation: Always locate your article 🚢
- Insert Excalidraw Scenes into Articles 🧑🎨



- Search inside your Articles 🔍



## 📄 Purpose

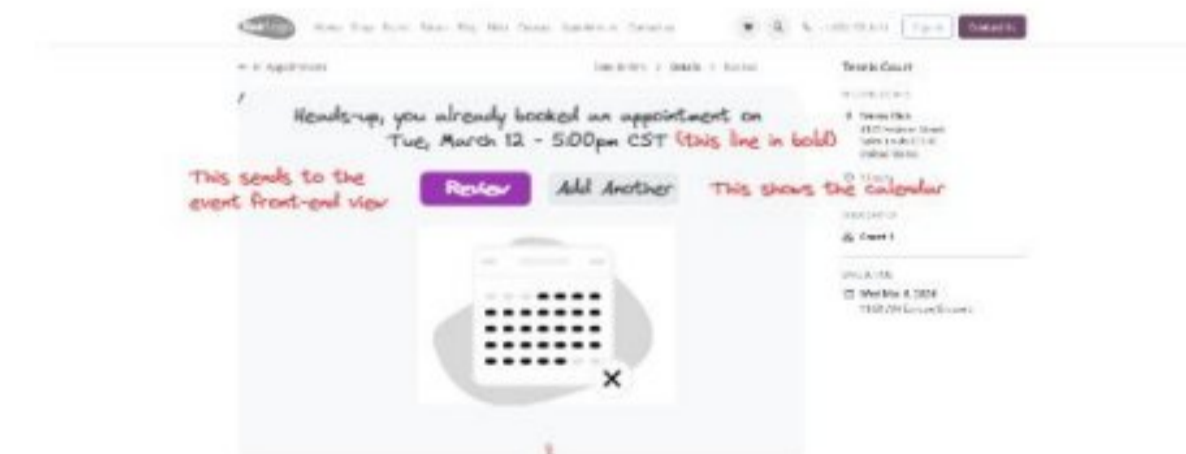
Explain in a few words the problem that this change is going to solve.

## 🧠 Functional Specifications


When a visitor is opening a type, check if they already have some upcoming meetings planned (calendar event with an appointment type set)  
If yes,  
==> show a warning instead of the calendar

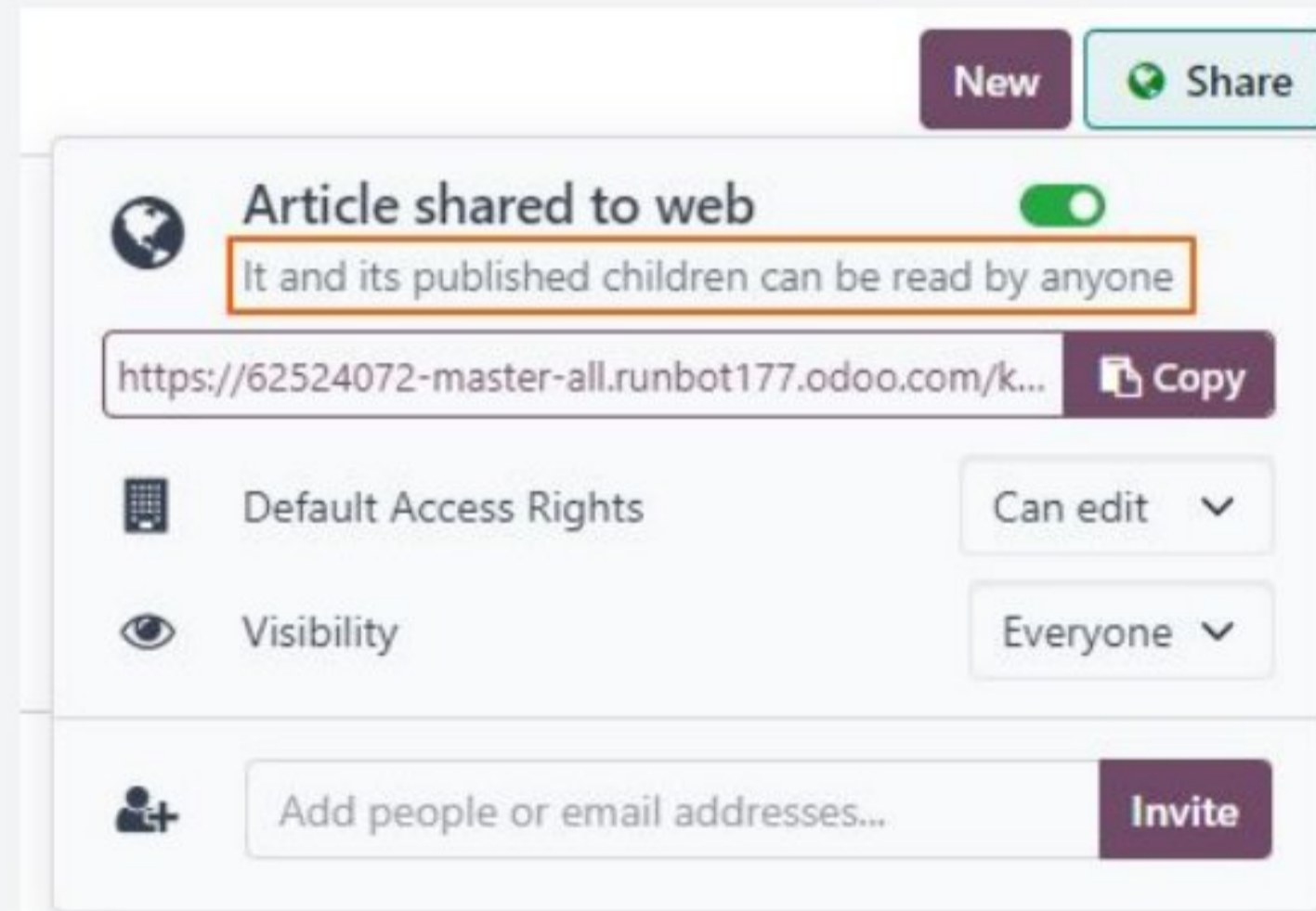
### RATIONALE:

Most times, this is a mistake and people just forgot or do not take the time to first cancel to reschedule

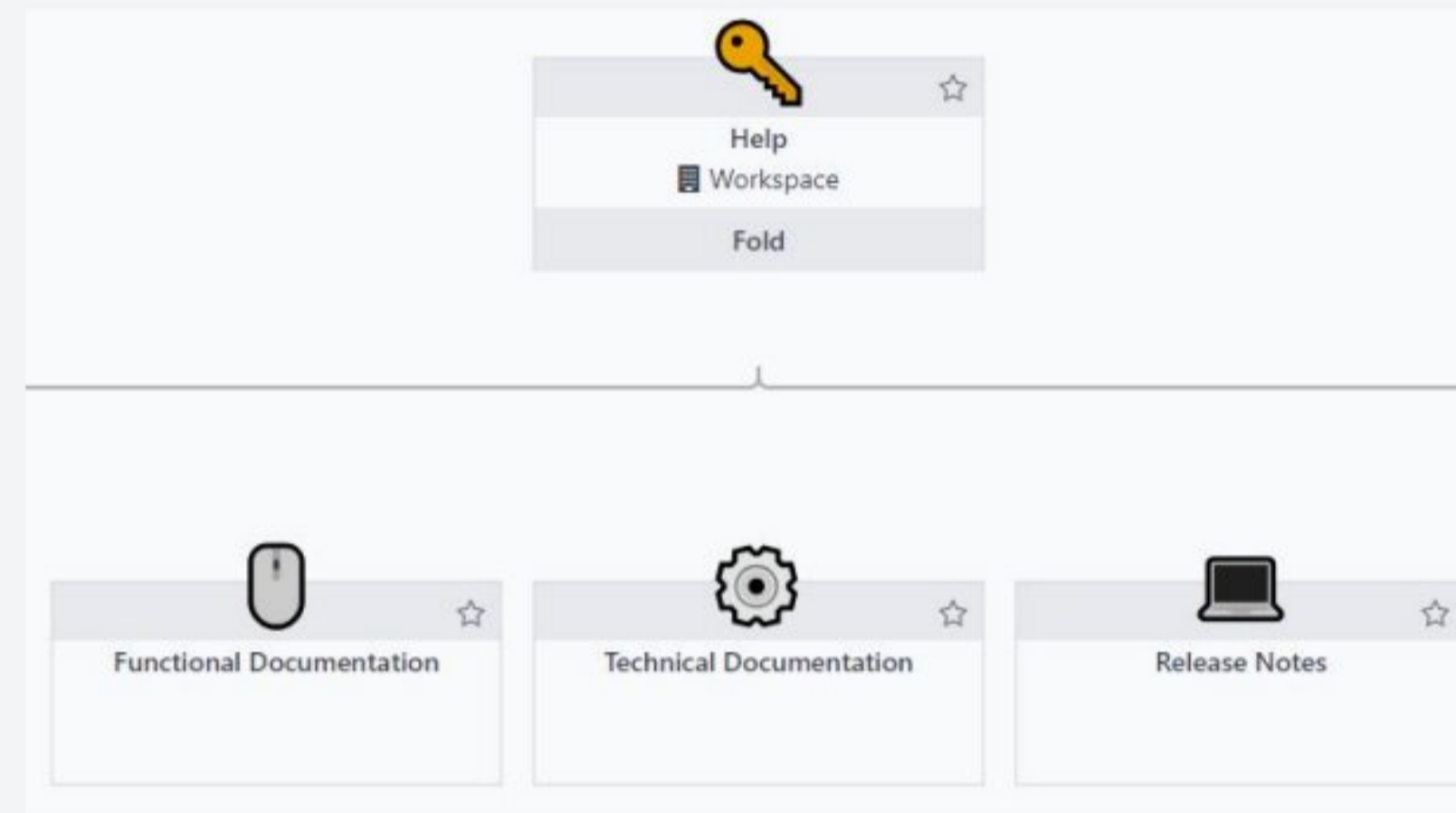



# But also...

- Better Publishing Access 



- Hierarchy View 



...and a lot of other improvements! 

# Spreadsheet & Dashboards



# Comments on cell

Documents Documents Configuration My Company (San Francisco)

Documents Pipeline dashboard Saved 2 Share

File Edit View Insert Format Data =PIVOT.VALUE("1","expected\_revenue","stage\_id","1")

Opportunities by Stage			Lost Opportunities by Stage		
	Count	Expected Revenue	Count	Expected Revenue	
New	2.00	64,000.00		7,500.00	
Qualified	6.00	127,300.00			
Proposition	2.00	75,000.00			
Won	3.00	23,800.00			
<b>Total</b>	<b>13.00</b>	<b>290,100.00</b>		<b>7,500.00</b>	

Actuals vs Target			
	Actuals	Target	
January 2024		10,000.00	
February 2024		10,000.00	
March 2024		10,000.00	
April 2024	42,600.00	10,000.00	
May 2024	130,000.00	10,000.00	
June 2024	117,500.00	10,000.00	
July 2024		10,000.00	0.00%
August 2024		10,000.00	0.00%
September 2024		10,000.00	0.00%
October 2024		10,000.00	0.00%

1 minute ago

Hi @Marc Demo ,  
Have you seen the expected revenue?  
😬

**Marc Demo** - now  
Wow @Mitchell Admin . That's great!!

Add a comment...

Send

Open all comments

## Use the power of Discuss in Spreadsheet

Sum: 64000

# Lists & Pivots edition

The screenshot shows a spreadsheet application interface. At the top, there are tabs for 'Documents', 'Configuration', and 'Untitled spreadsheet'. A menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', and 'Data'. The spreadsheet grid shows a pivot table with columns for 'Sales', 'Pre-Sales', 'Website', and 'Total', and rows for years 2023 and 2024, and various product categories like 'Deco Addict', 'Gemini Furniture', and 'YourCompany, Joel Willis'. A 'Pivot properties' panel is open on the right, showing settings for the pivot table. The panel includes sections for 'Pivot name', 'Model', 'Columns', 'Rows', 'Measures', and 'Domain'. The 'Columns' section has 'Sales Team' with 'Order by' set to 'Automatic'. The 'Rows' section has 'Order Date' with 'Granularity' set to 'Year' and 'Order by' set to 'Automatic'. The 'Measures' section has 'Total' with 'Aggregated by' set to 'Average'. The 'Domain' section has a rule 'Salesperson = uld' and a checked 'Defer updates' option. The bottom of the panel shows 'Sum: \_\_'.

**Edit dynamic pivots in order to add or edit:**

- dimensions
- measures
- domain



# Data tables

The screenshot shows a spreadsheet application interface. At the top, there are window titles: "Documents", "Documents", "Configuration", and "My Company (San Francisco)". Below the window titles is a menu bar with "File", "Edit", "View", "Insert", "Format", and "Data". A toolbar contains various icons for formatting and editing. The main area is a spreadsheet grid with columns A through O and rows 1 through 37. A data table is defined in the range A1:E24. The table has the following structure:

(#1) Sales Orders by Order Date	Sales	Pre-Sales	Website	Total
	Total	Total	Total	Total
2023	\$241.81			\$241.81
Deco Addict	\$575.00			\$575.00
Gemini Furniture	\$287.50			\$287.50
YourCompany, Joel Willis	\$147.09			\$147.09
2024	\$15,181.36	\$862.50	\$210.83	\$13,622.67
Deco Addict	\$44,637.25			\$44,637.25
Deco Addict, Douglas Fletcher	\$2,300.00			\$2,300.00
Gemini Furniture	\$8,408.80			\$8,408.80
Gemini Furniture, Edwin Hansen	\$0.00			\$0.00
Gemini Furniture, Oscar Morgan	\$0.00			\$0.00
Lumber Inc		\$862.50		\$862.50
Pippo spa	\$511.35			\$511.35
Ready Mat	\$20,192.92			\$20,192.92
Ready Mat, Billy Fox	\$573.85			\$573.85
Ready Mat, Edith Sanchez	\$573.85			\$573.85
Ready Mat, Kim Snyder	\$573.85			\$573.85
Wood Corner	\$115.58			\$115.58
Wood Corner, Ron Gibson	\$4,025.00			\$4,025.00
Wood Corner, Willie Burke	\$2,300.00			\$2,300.00
YourCompany, Joel Willis	\$1,304.02		\$287.50	\$1,176.95
YourCompany, Marc Demo			\$172.50	\$172.50
Total	\$12,940.43	\$862.50	\$210.83	\$11,798.01

To the right of the spreadsheet, an "Edit table" panel is open. It contains the following options:

- Style options:**
  - Header row(s) 1
  - Total row
  - Banded rows
  - Filter button
  - First column
  - Last column
  - Banded columns
- Data range:** A1
- Automatically autofill formulas
- Auto-adjust to formula result

A "Delete table" button is located at the bottom right of the panel.

Use **data tables** to quickly:

- sort
- style
- filter
- add new records

# New charts & options

**Bar**

Sales persons	New clients	Sold quantities
Emmy	12	40
Saffi	2	45
Chloe	45	45
Meg	10	15
Lulu	38	45
Hannah	35	30
Jess	12	15
Charly	18	15
Lauren	42	45

**Combo**

Sales persons	Sold quantities	Predicted sales amount
Emmy	40	40
Saffi	45	48
Chloe	45	35
Meg	15	32
Lulu	45	35
Hannah	30	32
Jess	15	20
Charly	15	10
Lauren	45	48

**Chart**

Configuration Design

**General**

Background Color

Chart Title

**B I A**

Legend position

**Data Series**

Background Color

Vertical axis

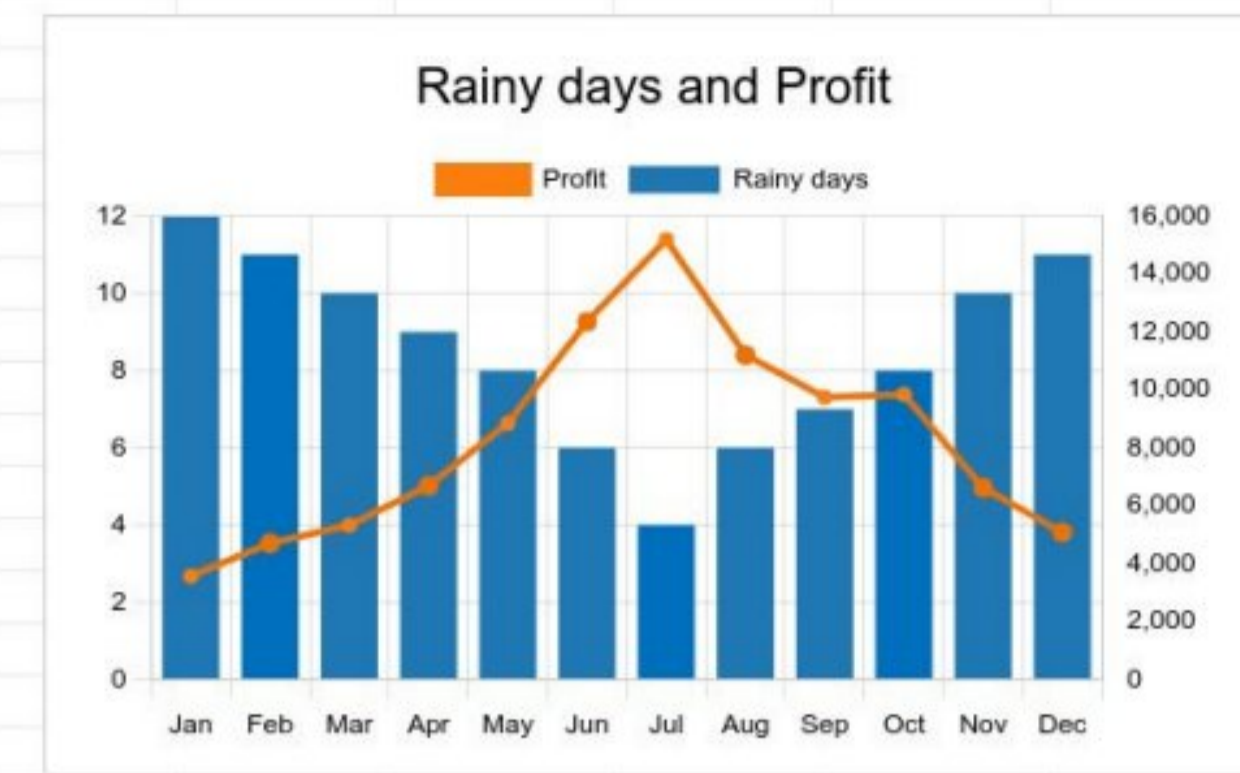
Serie name

**Axis**

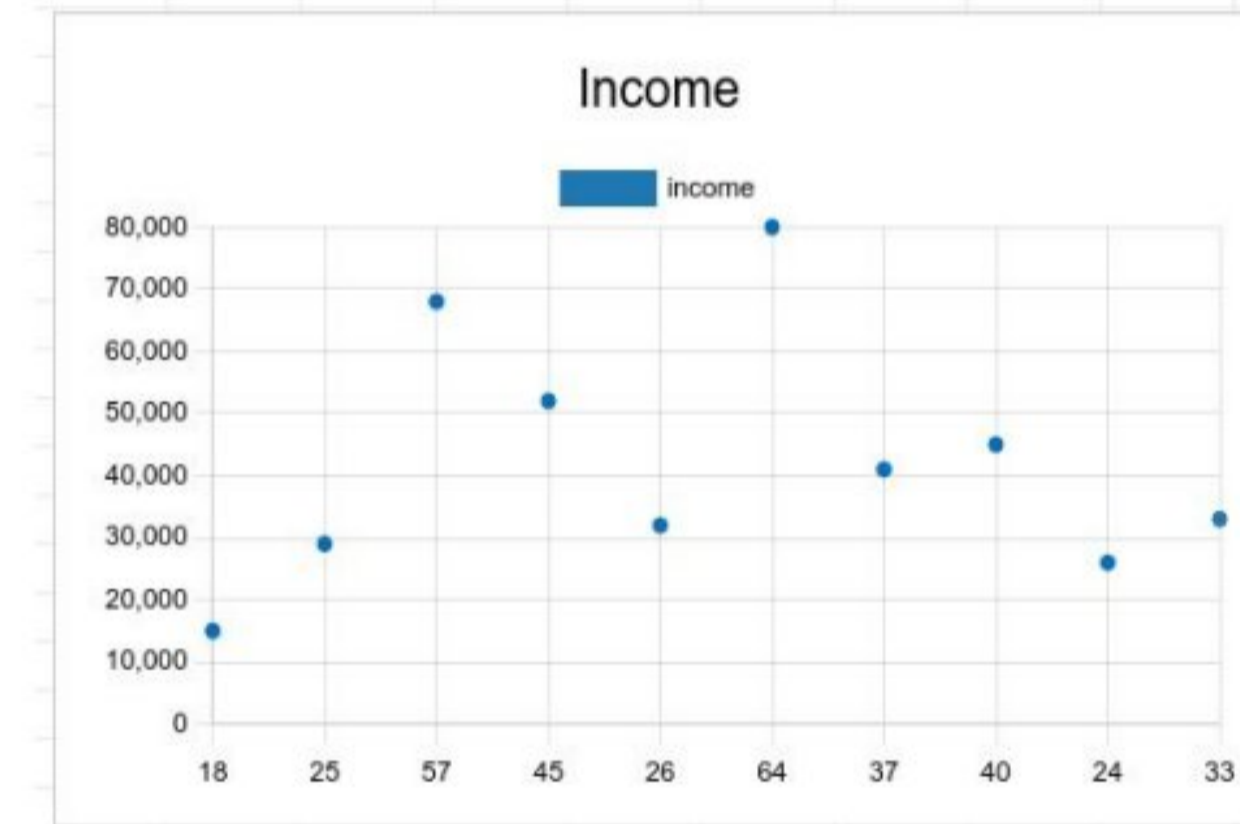
Axis Title

**B I A**

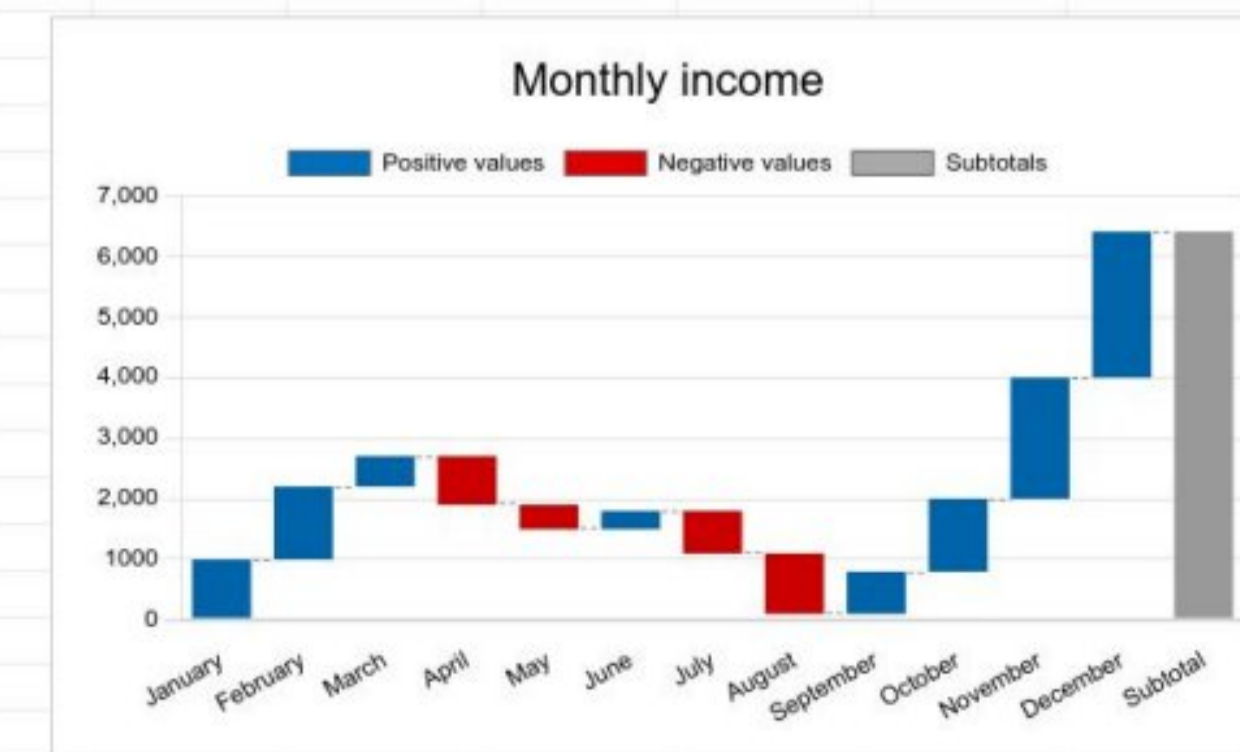
**Enhanced Customization**



**Combo**



**Scatter**



**Waterfall**

# Performances

## Spreadsheets speed comparison

29	sheets
195,000	cells
170,000	formulas
763,000	references

## ... And more!

- **Improved UX** for dashboards creation
- **New functions** (INDIRECT, INT, CELL & ODOO.RESIDUAL)
- **Improved VLOOKUP**
- **Restore data** from Version History
- Copy-paste from one spreadsheet to another
- Addition of **plain text format**
- Addition of **sheet granularity** in Find & Replace

# Documents



## ... At a glance!

- **Access shared documents** from Portal
- **Attachments from deleted records** are sent to the trash in Documents
- **Reach attached documents** from Accounting (as from a task for instance)
- **Preview XML file** if a PDF embedded
- Use SHIFT+S in the Split Tool to **spot white pages** and **preset the scissors**
- **Batch upload** improvement

Sign



# Request a signature from any document

The screenshot displays the Odoo CRM interface for a task titled "S00063 - Plumbing Services". The task is currently in the "In Progress" stage. A dropdown menu is open over the task, with the "Request Signature" option highlighted in red. The menu also includes options like "Print", "Archive", "Duplicate", "Delete", "Add Properties", "Restore History", "Share Task", "Send SMS Text Message", "Convert to Task/Sub-Task", "Convert to Ticket", and "Send Report".

Task details shown:

- Customer: Deco Addict
- Sales Order Item: S00063 - Plumbing Services (Deco Addict)
- Deadline: [blank]
- Allocated Time: 00:00 (0%)

Activity log on the right shows:

- Odoobot - 6 hours ago: Subject: Reception of S00063 - Plumbing Services. Dear Deco Addict, Thank you for contacting us. We appreciate your interest in our products/services. Our team is currently reviewing your inquiry and will respond to your email as soon as possible. If you have any further questions or concerns in the meantime, please do not hesitate to let us know. We are here to help. Thank you for your patience. Best regards, [Read More](#)
- Odoobot - 6 hours ago: This task has been created from: S00063 (Plumbing Services)
- Odoobot - 6 hours ago: Task Created

**Request a signature** from any document in Odoo and **be notified when it is signed** automatically



# Reminder

Preview Cancel Sent Fully Signed Send message Log note WhatsApp Activities Follow

Document Name ?  
**Your Real Estate Listing Agreement**

Tags Sales X

Valid Until

Reminder  Send a reminder every 7 days.

Linked To

Signers Contacts in copy Activity Logs

Signer	Email	Role	State	
YourCompany, Joel Willis	joel.willis63@example.com	Customer	To Sign	<input checked="" type="checkbox"/> Resend

- Today
- OdooBot** - 6 hours ago  
The signature mail has been sent to: Joel Willis(Customer)
  - OdooBot** - 6 hours ago  
Signature Request created

**Control signature reminders** more easily than ever, **or disable them** in a single click

*... And more!*

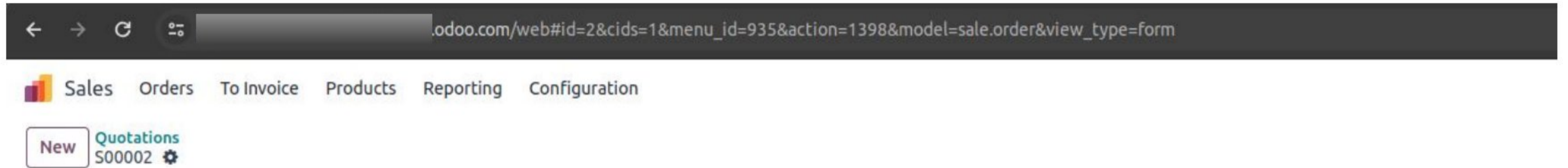
- Addition of **radio buttons**
- Allow **strikethrough**
- **Touch-compatible** sign backend
- Send a **batch of documents** for signature

# Framework



# Nice URLs

Before

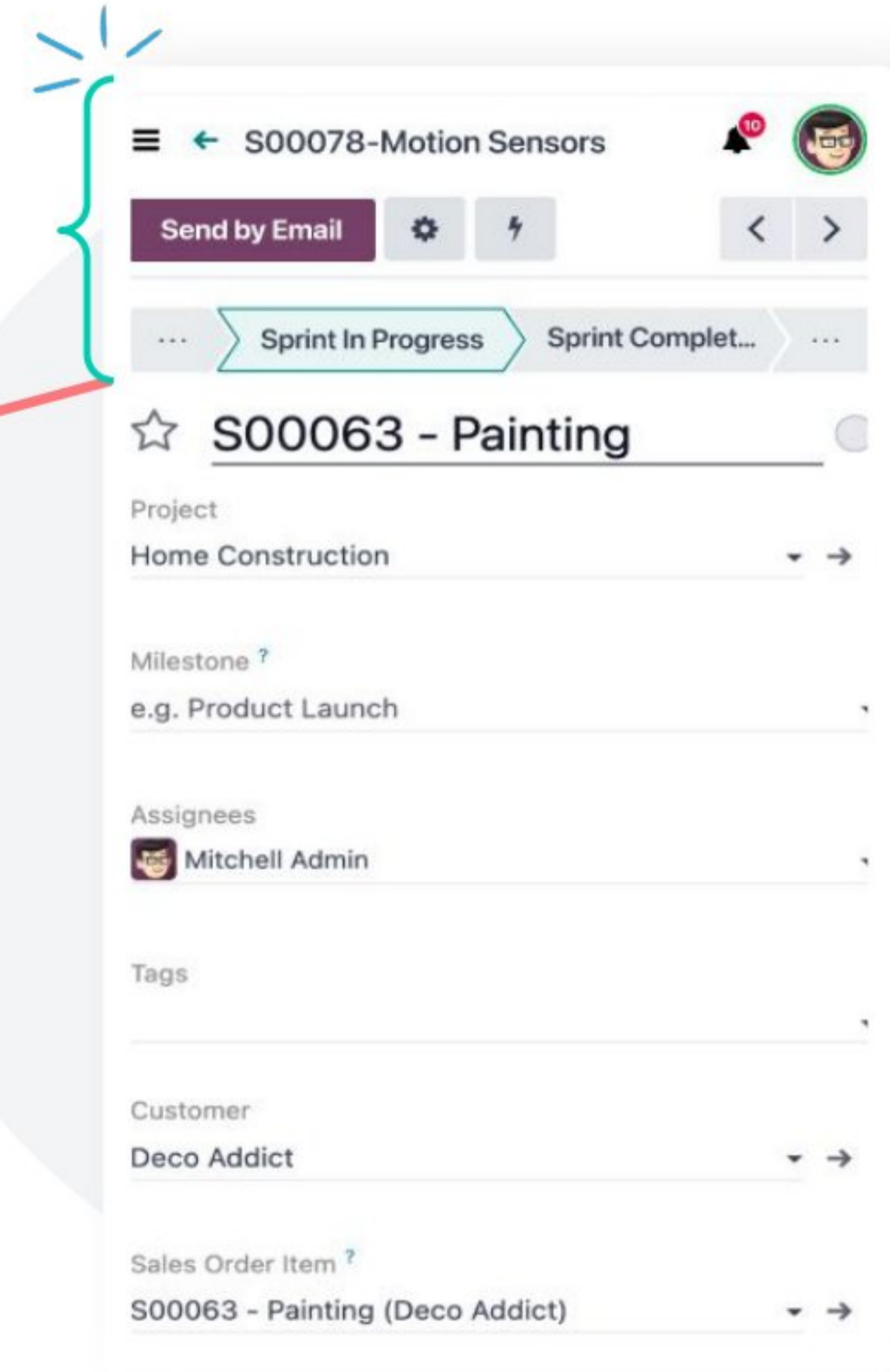
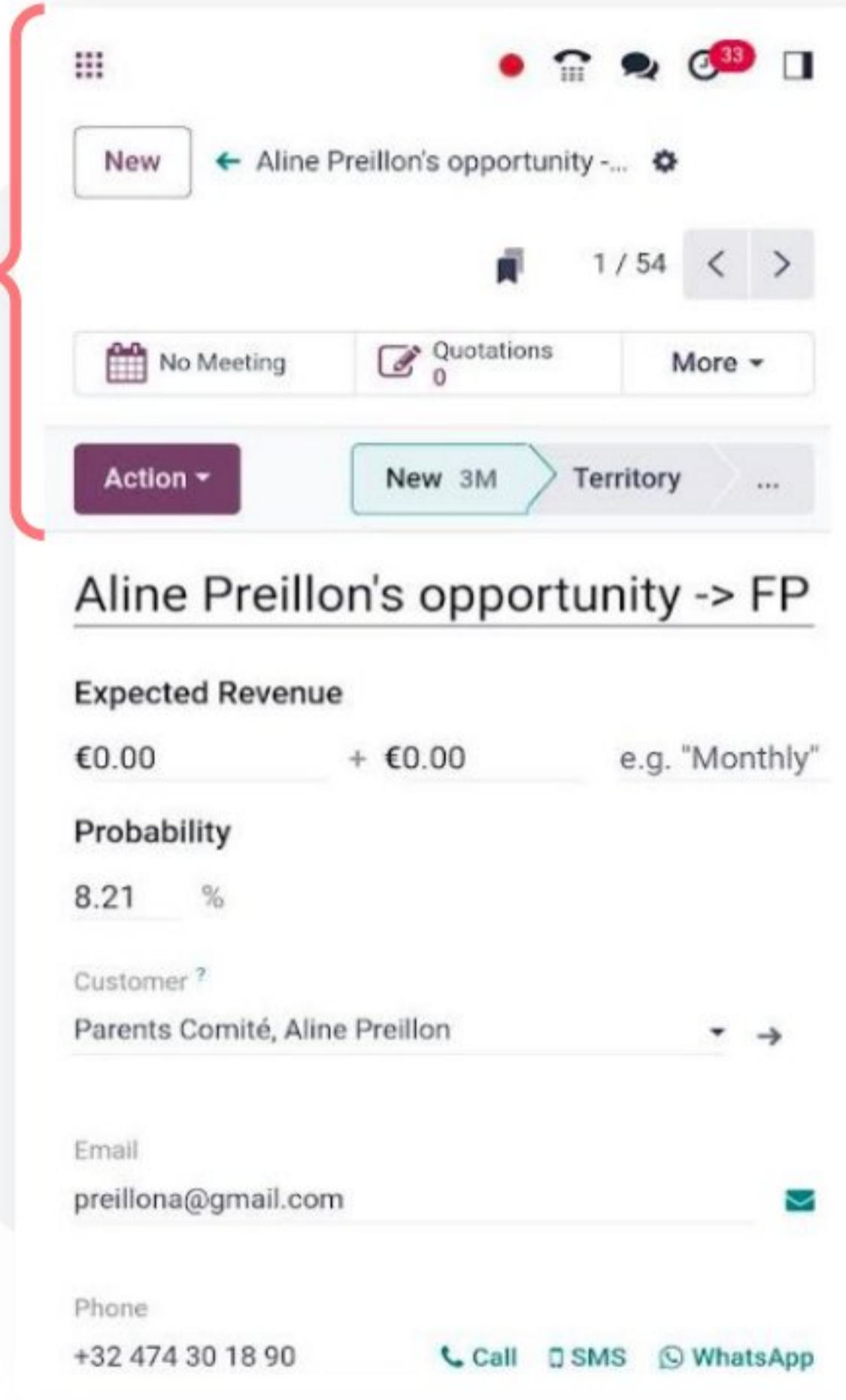


After



# New mobile UI

Header  
Too big



## ... *And more*

- Multi-company switcher
- **Print** CSS
- New unit testing framework: **HOOT**
- Bootstrap updated to **5.3**

 Thank you!

**Christophe Klopfert**  
chk1@odoo.com



/odoo



@odoo.official

**Slides**

<http://tiny.cc/odoo18>

