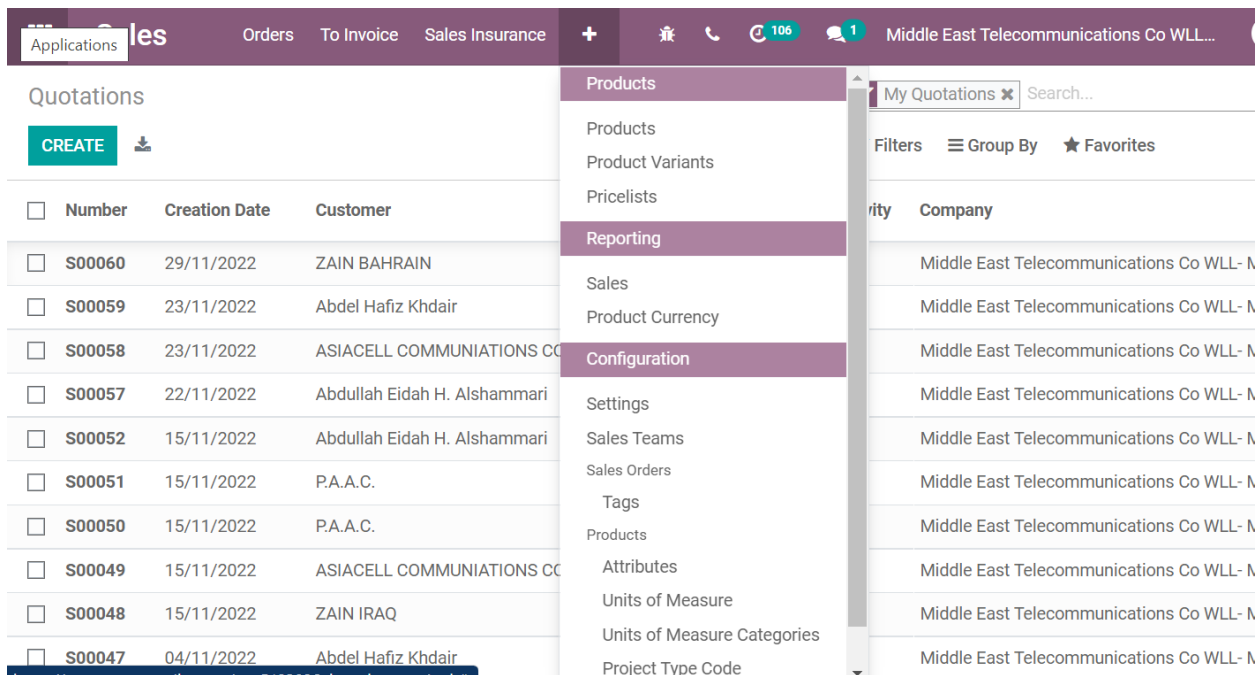


## USER MANUAL FOR SALES MODULE

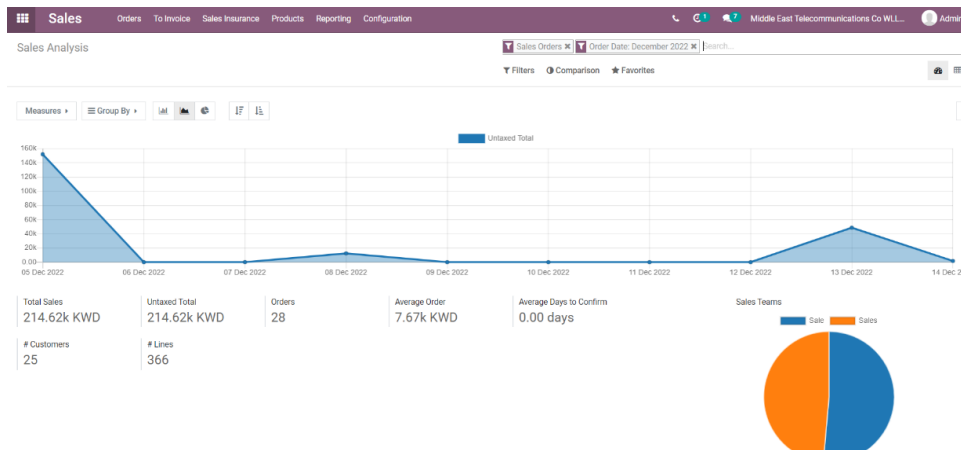
Odoo's sales management module is one of the important modules. Since it handles the sales order management, the Sales management module allows you effective control of your sales department. You can easily create a new sales order out of the different gained opportunity. Sales management module helps you in generating a new sales order, you can filter the order as per the requirement.



The screenshot shows the Odoo Sales Quotations interface. At the top, there are navigation tabs for 'Applications', 'Orders', 'To Invoice', and 'Sales Insurance'. A search bar contains 'Middle East Telecommunications Co WLL...'. Below the navigation, there is a 'Quotations' section with a 'CREATE' button and a table of quotations. A dropdown menu is open, showing options like 'Products', 'Reporting', and 'Configuration'. The table below has the following data:

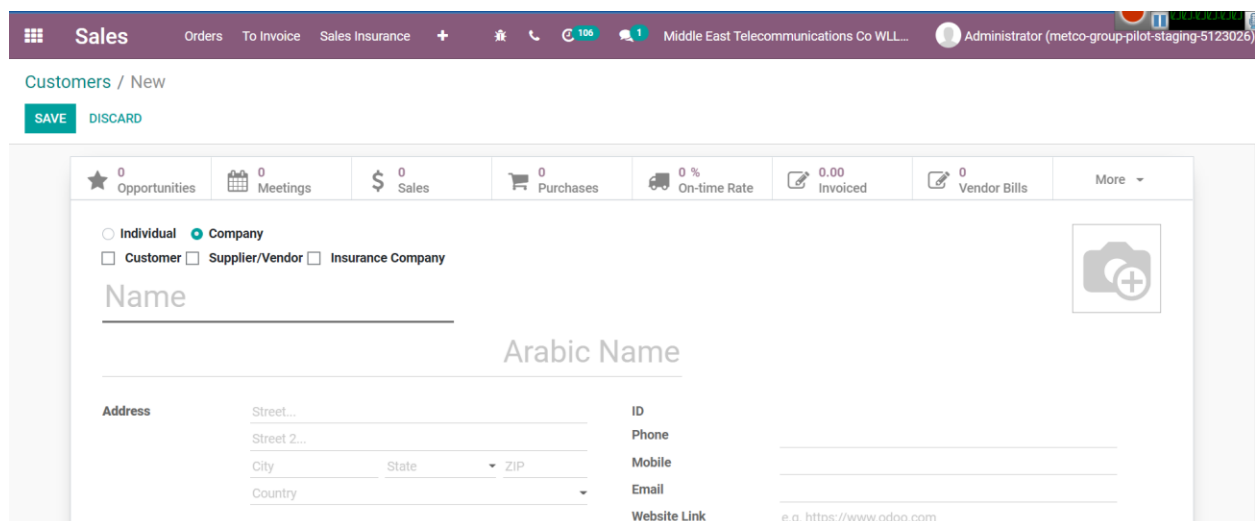
Number	Creation Date	Customer
S00060	29/11/2022	ZAIN BAHRAIN
S00059	23/11/2022	Abdel Hafiz Khdair
S00058	23/11/2022	ASIACELL COMMUNIATIONS CO
S00057	22/11/2022	Abdullah Eidah H. Alshammari
S00052	15/11/2022	Abdullah Eidah H. Alshammari
S00051	15/11/2022	P.A.A.C.
S00050	15/11/2022	P.A.A.C.
S00049	15/11/2022	ASIACELL COMMUNIATIONS CO
S00048	15/11/2022	ZAIN IRAQ
S00047	04/11/2022	Abdel Hafiz Khdair

The view dashboard window available in the module will give you a fast and better overview of the sales activities.



## Creating Customers

To create a Customer, Go to Sales - Orders - Customers: When you click the CREATE button it shows a form to create a new customer record. Customer form contains fields such as Name of the individual/company, Company Address, VAT, Phone, Mobile, Email, Website Link, customer Tags. It is possible to add multiple contacts inside a customer form, where for each contact you can provide Contact address, Invoice Address, Delivery address, private and other addresses. You can manage sales, purchase, inventory, and accounting information of the customer by providing some related details.



**Sales** Orders To Invoice Sales Insurance + 100 1 Middle East Telecommunications Co WLL... Administrator (metco-group-pilot-staging-5123026)

Customers / New

SAVE DISCARD

★ 0 Opportunities 📅 0 Meetings 💰 0 Sales 🛒 0 Purchases 🚚 0 % On-time Rate 📄 0.00 Invoiced 📄 0 Vendor Bills More ▾

Individual  Company

Customer  Supplier/Vendor  Insurance Company

Name \_\_\_\_\_

Arabic Name \_\_\_\_\_

Address

Street... \_\_\_\_\_ ID \_\_\_\_\_

Street 2... \_\_\_\_\_ Phone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Mobile \_\_\_\_\_

Country \_\_\_\_\_ Email \_\_\_\_\_

Website Link e.g. <https://www.odoo.com>

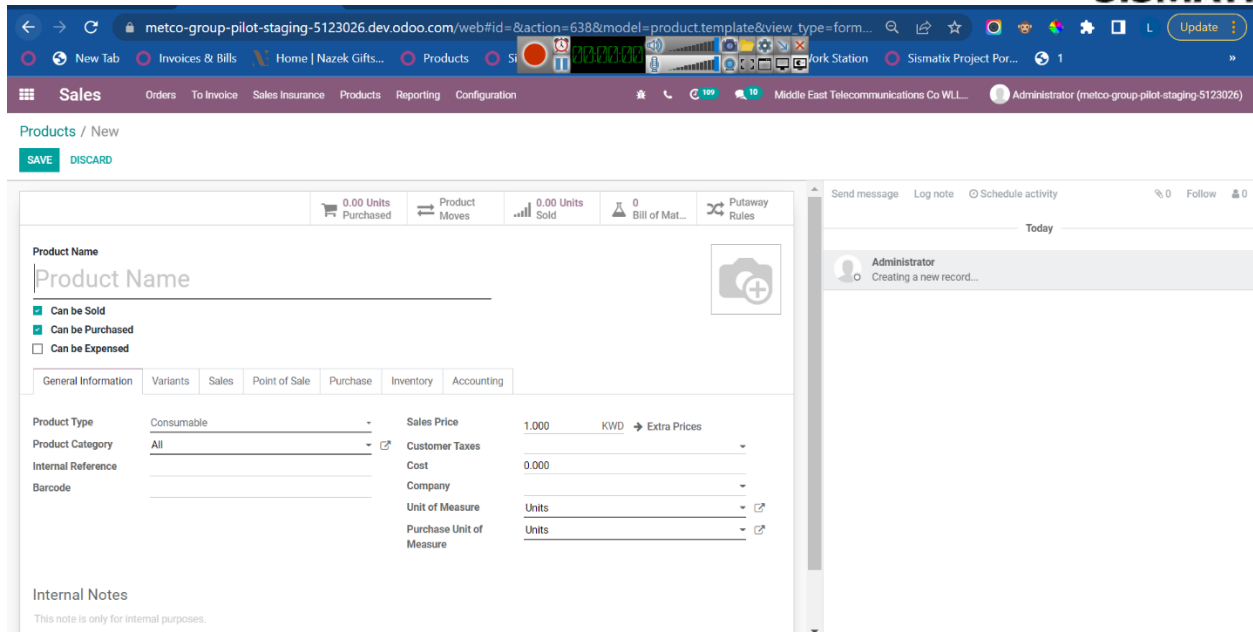
<b>Sales</b> Salesperson _____ ▾ Collector Employee _____ ▾ Sales Team _____ ▾ Payment Terms _____ ▾ Pricelist _____ ▾		<b>Purchase</b> Payment Terms _____ ▾ Payment Method _____ ▾ Receipt Reminder <input type="checkbox"/> Supplier Currency _____ ▾	
<b>Point Of Sale</b> Barcode _____ Loyalty Points 0.00 _____		<b>Fiscal Information</b> Fiscal Position _____ ▾	
<b>Misc</b> Reference _____ Company _____ ▾ Website _____ ▾ Industry _____ ▾		<b>Inventory</b> Customer Location Partner Locations/Customers _____ ▾ ↗ Vendor Location Partner Locations/Vendors _____ ▾ ↗	

Customer check box should be checked if it is customer.  
Reference Field is reference number for customer.

## Products

Every business is related to at least one product. In marketing terms “A product is anything that can be offered to a market that might satisfy a want or need. In retailing, products are called merchandise. In manufacturing, products are bought as raw materials and sold as finished goods.”

Every bit of information about a product is stored in the system for better product management. In Odoo most of the modules including Inventory, Sales, Purchase, POS, Manufacturing, etc. allows to create and configure products.



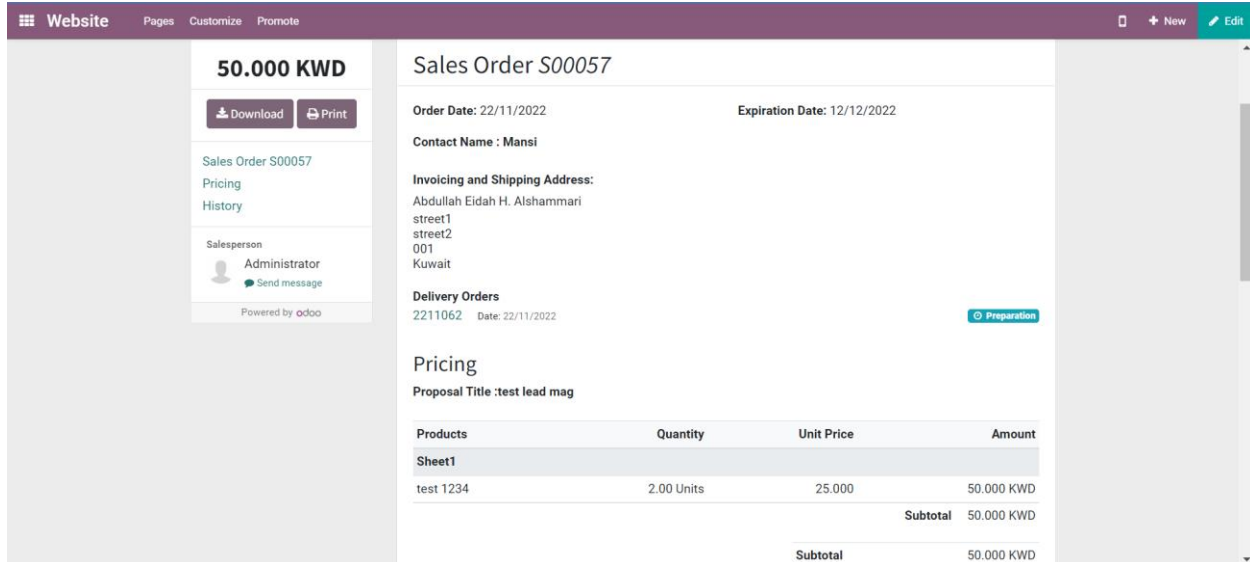
The platform allows you to manage all types of products such as Consumable products, Storable products, and Services. Storable products are the product types that can be used in stock management and their supply is more or less automated based upon the rules defined in the system. Consumable products can also be considered as the storable product with the exception that stock management is not taken into account by the system. The customers can receive this type of product directly from the provider. In the case of service products, it is considered a non-material product. All types of services that provide a company to its customers are included in this type.

### **Easily integrated with CRM application**

The operations and all the activities of the Sales module can be easily integrated with the CRM application. Using the CRM application along with the Sales module will be very helpful for managing your sales pipeline and tracking all the related activities. Integrating the CRM application with the Sales module will give you the insight to track all the sales activities and sales pipeline from the initial stage to the closing stage.

### **Deal Quotations online**

In the Odoo platform, you have the provision for the online review and digital signature. The digital signature is the fast and easy way to send, sign and approve your business deals. This facility will make your business more smooth and advanced.



The screenshot displays the Odoo Sales Order S00057 interface. The total amount is 50,000 KWD. The order date is 22/11/2022, and the expiration date is 12/12/2022. The contact name is Mansi. The invoicing and shipping address is Abdullah Eidah H. Alshammari, street1, street2, 001, Kuwait. The delivery order is 2211062, dated 22/11/2022, with a 'Preparation' button. The pricing section shows a proposal title 'test lead mag' and a table with the following data:

Products	Quantity	Unit Price	Amount
Sheet1			
test 1234	2.00 Units	25.000	50,000 KWD
		<b>Subtotal</b>	<b>50,000 KWD</b>
		<b>Subtotal</b>	<b>50,000 KWD</b>

## Manage Sales order efficiently

The Odoo sale module helps you perfectly handle sales order management. The platform effectively controls all the sales activities and your sales department. Implementing the Odoo Sales module for your organization will be a better decision. You use this module to easily create and manage a sale order. In a business an order issued by a vendor to the customer at any stage is well managed by the platform. Using this platform, you can easily convert quotations to sale orders. This can be done with a few clicks. Moreover, you can easily filter the order based upon your requirements.

Number	Order Date	Customer	Salesperson	Next Activity	Company	Total	Invoice Status
S00080	10/12/2022	Abdel Hafiz Khdair	Aamir Siddique		Middle East Telecommunications Co WLL- Metco	5,200.000 KWD	Nothing to Invoice
S00061	09/12/2022	ASIACELL COMMUNIATIONS CO	Administrator		Middle East Telecommunications Co WLL- Metco	1.000 KWD	Nothing to Invoice
S00007	09/12/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	20.000 KWD	Nothing to Invoice
S00056	09/12/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	40.000 KWD	Nothing to Invoice
S00060	29/11/2022	ZAIN BAHRAIN	Administrator		Middle East Telecommunications Co WLL- Metco	1,200.000 KWD	Fully Invoiced
S00058	23/11/2022	ASIACELL COMMUNIATIONS CO	Administrator		Middle East Telecommunications Co WLL- Metco	300.000 KWD	Nothing to Invoice
S00057	22/11/2022	Abdullah Eidah H. Alshammari	Administrator		Middle East Telecommunications Co WLL- Metco	50.000 KWD	Nothing to Invoice
S00055	18/11/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	4,820.010 KWD	Nothing to Invoice
S00054	15/11/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	6,398.078 KWD	Nothing to Invoice
S00053	15/11/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	6,398.078 KWD	Nothing to Invoice
S00051	15/11/2022	P.A.A.C.	Administrator		Middle East Telecommunications Co WLL- Metco	200.000 KWD	To Invoice
S00050	15/11/2022	P.A.A.C.	Administrator		Middle East Telecommunications Co WLL- Metco	200.000 KWD	To Invoice
S00048	15/11/2022	ZAIN IRAQ	Administrator		Middle East Telecommunications Co WLL- Metco	100.000 KWD	Nothing to Invoice
S00045	14/11/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	6,398.078 KWD	Nothing to Invoice
S00044	10/11/2022	Technical Group Company for General Trading	Gurusamy Selvan		Middle East Telecommunications Co WLL- Metco	624.999 KWD	Nothing to Invoice
S00013	10/11/2022	Doaa Abdallah test	Hani Ahmaduk		Middle East Telecommunications Co WLL- Metco	10.000 KWD	Nothing to Invoice

## Sale Order Creation

In Metco, Quotation is created from the CRM app. Before confirming the sale order, should add project type code, start date, end date and click on the confirm button. So, the project is created with the auto generated project number. And the delivery order is created against the sale order.

Sales
Orders
To Invoice
Sales Insurance
Products
Reporting

Sales Orders / S00080

[EDIT](#) [CREATE](#) Print Action

[CREATE INVOICE](#) [SEND BY EMAIL](#) [CANCEL](#) QUOTATION QUOTATION SENT **SALES ORDER**

Customer Preview
Project Overview
1 Delivery
1 Invoices
0 Insurances

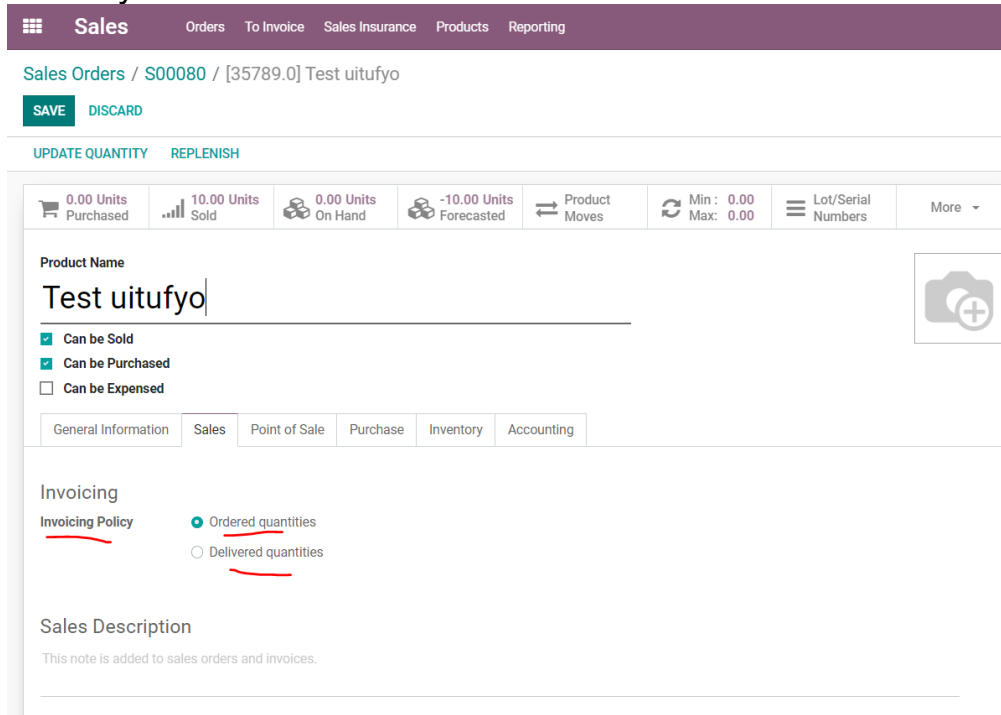
**S00080**

Customer	Abdel Hafiz Khdair	Order Date	10/12/2022 14:00:16
Project	KWUCS22101 - S00080 - Abdel Hafiz Khdair	Pricelist	Public Pricelist (KWD)
Project Type Code	UC Sundry	BoQ Master	CRM/00056-BoQ/54
Start Date	10/12/2022	Payment Terms	15 Days
End Date	09/12/2023	Source Location	
Contact Name	Maged		

Product	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Subtotal
<b>Passive</b>							
<b>UTP Points</b>							
[35789.0]	Test uitufyo	10.00	0.00	10.00	Units	131.840	1,318.400 KWD
[5678.0]	Test 2 yutiubk	30.00	0.00	30.00	Units	122.720	3,681.600 KWD
<b>Professional Services</b>							
[P001]	Project Expense	1.00	0.00	0.00	Units	200.000	200.000 KWD

If the product, is configured as ordered quantities, then you can create invoice directly after confirming the sale order.

But if it is delivered quantities, then you can create invoice, only if the delivery order is validated.



The screenshot shows the SISMATIX Sales Order form for product 'Test uitufyo'. The form is titled 'Sales Orders / S00080 / [35789.0] Test uitufyo' and includes 'SAVE' and 'DISCARD' buttons. Below the title are 'UPDATE QUANTITY' and 'REPLENISH' options. A navigation bar at the top contains 'Sales', 'Orders', 'To Invoice', 'Sales Insurance', 'Products', and 'Reporting'. A status bar shows '0.00 Units Purchased', '10.00 Units Sold', '0.00 Units On Hand', and '-10.00 Units Forecasted', along with 'Product Moves', 'Min: 0.00 Max: 0.00', and 'Lot/Serial Numbers'. The 'Product Name' field is 'Test uitufyo'. Below it are checkboxes for 'Can be Sold' (checked), 'Can be Purchased' (checked), and 'Can be Expensed' (unchecked). A tabbed interface shows 'General Information', 'Sales', 'Point of Sale', 'Purchase', 'Inventory', and 'Accounting'. The 'Invoicing' section has 'Invoicing Policy' with radio buttons for 'Ordered quantities' (selected) and 'Delivered quantities'. The 'Sales Description' field contains the text 'This note is added to sales orders and invoices.'

Quotations are created from CRM app and upon confirmation the delivery and project are created. Project type code is mandatory field should be filled by the user, in order to autogenerate the project code. Project type, opportunity, Crm lead name all will be automatically fetched from the crm module.

Sales Orders / S00080

EDIT CREATE Print Action 1/51 < >

CREATE INVOICE SEND BY EMAIL CANCEL QUOTATION QUOTATION SENT SALES ORDER Send message Log note Schedule activity 0 Following 3

Customer Preview Project Overview 1 Delivery 0 Insurances

**S00080**

Customer: Abdel Hafiz Khdair Order Date: 10/12/2022 14:00:16  
 Project: KWUCS22101 - S00080 - Abdel Hafiz Khdair Pricelist: Public Pricelist (KWD)  
 Project Type Code: UC Sundry BoQ Master: CRM/00056-BoQ/54  
 Start Date: 10/12/2022 Payment Terms: 15 Days  
 End Date: 09/12/2023 Source Location  
 Contact Name: Maged

Order Lines Other Info Customer Signature

Product	Description	Quantity	Delivered	Involved	UoM	Unit Price	Subtotal
<b>Passive</b>							
<b>UTP Points</b>							
[35789.0] Test utufyo	Test utufyo	10.00	0.00	0.00	Units	131.840	1,318.400 KWD
[5678.0] Test 2 yutiubk	Test 2 yutiubk	30.00	0.00	0.00	Units	122.720	3,681.600 KWD
<b>Professional Services</b>							
[P001] Project Expense	[P001] Project Expense	1.00	0.00	0.00	Units	200.000	200.000 KWD

Yesterday

Administrator - 8 day ago  
Quotation confirmed  
• Status: Quotation → Sales Order

Administrator - 8 day ago  
Sales Order created

Below is the delivery screen, If the quantity is available, First u need to click on check availability and then validate . Here mandatory field is project, analytic account ,service type and account.

Sales Orders / S00080 / 2212090

EDIT CREATE Print Action 1/1 < >

CHECK AVAILABILITY VALIDATE SCRAP UNLOCK CANCEL DRAFT WAITING READY DONE Send message Log note Schedule activity 0 Follow 2

Operations

☆ **2212090**

Delivery Address: Abdel Hafiz Khdair Scheduled Date: 10/12/2022 14:00:16  
 Source Location: WH/Stock Deadline: 10/12/2022 14:00:16  
 Customer PO: Source Document: S00080  
 Reference: Project: KWUCS22101 - S00080 - Abdel Hafiz Khdair  
 Analytic Account: KWUCS22101: S00080 - Abdel Hafiz Khdair  
 Service Type: CCTV Camera (Network)  
 Account: Set

Operations Additional Info Note

Product	On Hand Qty	Demand	Reserved	Done	Unit Measure	Account
[35789.0] Test utufyo	0.00	10.00	Not Available	0.00	Units	
[5678.0] Test 2 yutiubk	0.00	30.00	Not Available	0.00	Units	

Yesterday

Odoobot - 8 day ago  
This transfer has been created from: S00080

Odoobot - 8 day ago  
Transfer created

## Invoice can be created from the create invoice button

Sales Orders / S00080

EDIT CREATE Print Action

CREATE INVOICE SEND BY EMAIL CANCEL QUOTATION QUOTATION SENT SALES ORDER

Customer Preview Project Overview 1 Delivery 0 Insurances

**S00080**

Customer: Abdel Hafiz Khdair Order Date: 10/12/2022 14:00:16  
 Project: KWUCS22101 - S00080 - Abdel Hafiz Khdair Pricelist: Public Pricelist (KWD)  
 Project Type Code: UC Sundry BoQ Master: CRM/00056-BoQ/54  
 Start Date: 10/12/2022 Payment Terms: 15 Days  
 End Date: 09/12/2023 Source Location  
 Contact Name: Maged

Product	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Subtotal
Passive							
UTP Points							
[35789.0]	Test ultiyfo	10.00	0.00	0.00	Units	131.840	1,318.400 KWD
[5678.0]	Test 2 yutiubk	30.00	0.00	0.00	Units	122.720	3,681.600 KWD
Professional Services							

Send message Log note Schedule activity

Yesterday

Administrator - a day ago  
Quotation confirmed  
• Status: Quotation → Sales Order

Administrator - a day ago  
Sales Order created

invoice Sales Orders / S00080 Products Reporting Configuration

111 10 Middle East Telecommunications Co WLL... Administrator (r)

**Create invoices**

Invoices will be created in draft so that you can review them before validation.

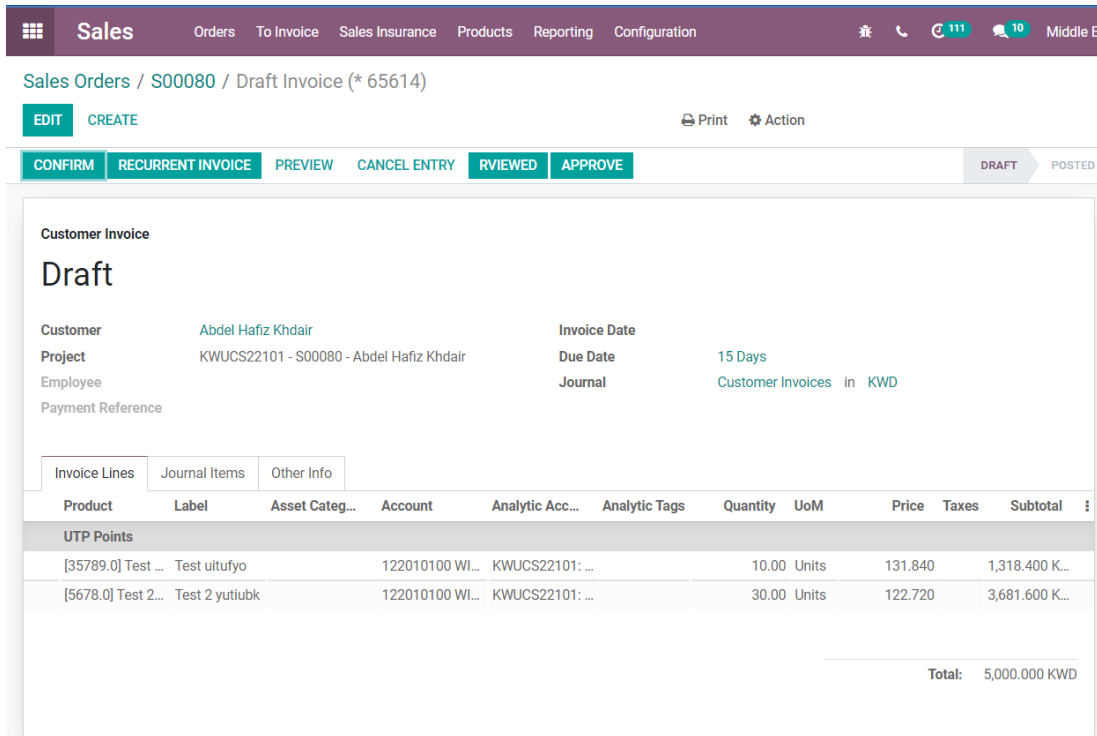
**Create Invoice**

Regular invoice  
 Down payment (percentage)  
 Down payment (fixed amount)

CREATE AND VIEW INVOICE CREATE INVOICE CANCEL

hdair

Create and view invoice, Draft invoice is created.



Sales Orders / S00080 / Draft Invoice (\* 65614)

EDIT CREATE Print Action

CONFIRM RECURRENT INVOICE PREVIEW CANCEL ENTRY RVIEWED APPROVE DRAFT POSTED

**Customer Invoice**

**Draft**

Customer: Abdel Hafiz Khdaïr Invoice Date: 15 Days  
 Project: KWUCS22101 - S00080 - Abdel Hafiz Khdaïr Due Date: 15 Days  
 Employee: Journal: Customer Invoices in KWD  
 Payment Reference:

Product	Label	Asset Categ...	Account	Analytic Acc...	Analytic Tags	Quantity	UoM	Price	Taxes	Subtotal
<b>UTP Points</b>										
[35789.0] Test ...	Test ultufyo		122010100 WI...	KWUCS22101: ...		10.00	Units	131.840		1,318.400 K...
[5678.0] Test 2...	Test 2 yutiubk		122010100 WI...	KWUCS22101: ...		30.00	Units	122.720		3,681.600 K...
									<b>Total:</b>	5,000.000 KWD

Can be document reviwed,approve,and then confirm and register the payment by selecting the journals and create the payment.

## Customer Portal

In the Odoo platform, the customers are able to access an online portal that can be used to view and track quotes, sale orders, the status of delivery orders, and many more aspects. The customer can either deny or accept the quotation. They can also simply manage the purchase order from this portal. The online transaction can also be conducted here.

Website Pages Customize Promote

Home Help Contact us Administrator Contact Us

This is a preview of the customer portal. → Back to edit mode

Home / Sales Orders / Sales Order S00060

**1,200.000 KWD**

Download Print

Sales Order S00060  
Pricing  
Payment terms  
History

Salesperson  
Administrator  
Send message

Powered by odoo

**Sales Order S00060**

Order Date: 29/11/2022 Expiration Date: 19/12/2022

**Invoicing and Shipping Address:**  
ZAIN BAHRAIN  
Kuwait

**Delivery Orders**  
2211072 Date: 29/11/2022 Shipped

**Pricing**

Products	Quantity	Unit Price	Amount
[AV] J179 IP PHONE GLBL NO PWR SUPP WH	12.00 Units	100.000	1,200.000 KWD

## Contracts

The Odoo platform allows you to track every stage of a contract such as invoicing, renewal, and upselling.

Manage invoices in terms of ordered quantities or delivered quantities

It is very important to have a business with different options for invoicing. The module allows you to manage invoices both in terms of ordered quantities or delivered quantities. The different invoicing options will provide you more flexibility in your business.

The sales module is one of the most relevant applications available in the Odoo ERP. This application can help your organization to manage all the sophisticated sales activities in a well efficient way with its advanced tools and features.