

odoo

*Odoo 18
R&D Sneak Peak*

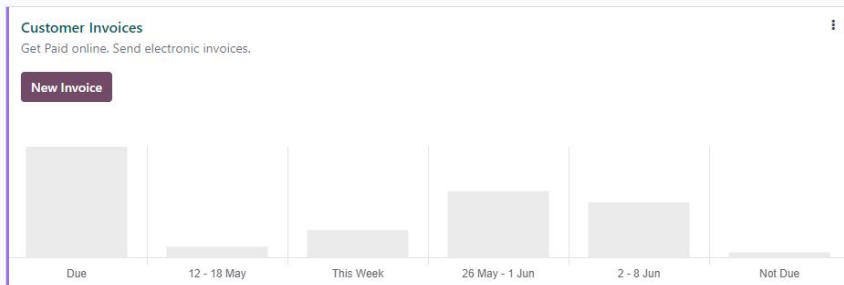
Christophe Klopfert, Product Owner



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



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**

~~Can be Sold~~ ~~Can be Purchased~~ ~~Can be Expensed~~ ~~Recruiting~~ ~~Can be Rented~~ ~~Point of Sale~~

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

Product Type [?] Service
Customable **Goods**
Service
~~Storable Product~~
~~Booking Fee~~
Combo
~~Event Ticket~~
~~Event Booth~~
~~Course~~
At cost

Invoicing Policy [?] Service

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 *on change: recompute purchase tax invisible if service*

Purchase Taxes

Product Category All / Saleable / Office Furniture

Internal Reference FURN_6666 Version [?] 1

Barcode 601647835653

Product Template Tags *move to sales*

~~Configure tags~~

Company

INTERNAL NOTES

This note is only for internal purposes.

Tab displayed or not based on checkbox

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



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

Approve Cancel

Actions
Archive
Duplicate
Set to draft

Draft > Approved > Done

Commission Plan

i.e. Commissions plan 2024

Dates _____ -> _____ Company Odoo IN Pvt Ltd

Periodicity monthly, quarterly, yearly _____ v

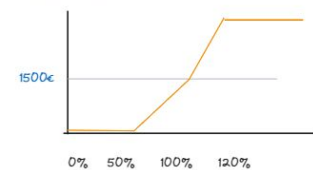
Based on Achievements, Targets per Person, Team

Commission on Target \$1500.00 per quarter

Commissions	Targets	Achievements	Sales People	Rate	
Invoiced Amount		any product	any category	non recurring	50%
New MRR			Monthly		100%
New MRR			Yearly		100%
New MRR			3 Years		300%
New MRR			5 Years		500%

Commissions Targets Achievements Sales People

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



Loyalty in Portal



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+1 (650) 555-0111

Joel Willis ▾

Contact Us

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 500085

- \$15.56

Online payment 500095

- \$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



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Mitchell Admin

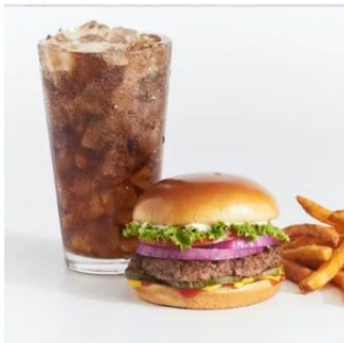
Contact Us

Search...



Default USD pricelist

All Products / Burger Menu Combo



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

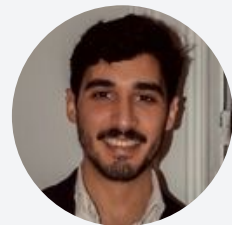
Footer

Terms & Cond

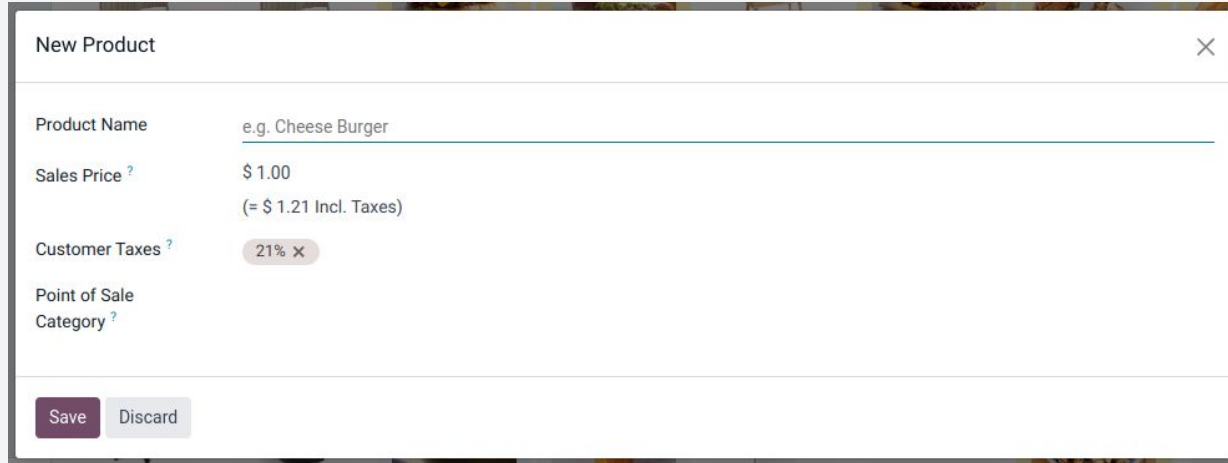
Save

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 are two buttons: 'Save' and 'Discard'.

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

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

1 Station Avia
Chaussée De Namur 67
1367 Ramillies

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 this location

Choose a pick-up point

1367

List view Map view

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

Choose this location

Choose a pick-up point

1367




List view Map view

Choose this location

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

Choose this location

Sign in button in checkout form

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Review Order > **Shipping** > Payment

Email Already have an account?

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

Fill in your address *Newsletter option*

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 Batch: form

Navigation: Inventory Overview Operations Products Reporting Configuration

Batch: BATCH/00002

Buttons: Validate, Print, Print Labels, Cancel

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

manyZone: Fleet_vehicle_id, non require Placeholder; Third Party Provider

manyZone: Fleet_vehicle_category placeholder: e.g. Semi-truck

invisible if no vehicle category

optional end_date (for gantt)

Ability to add properties depending on operation type

onchange

manyZone

Vehicle: Opel 6J45XC1234

Vehicle Category: Semi-Truck (250kg, 30m³)

Weight: 140kg (30%)

Volume: 110m³ (50%)

Reference	Scheduled Date	Source-Document	Partner	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 batch_sequence field, widget = drag_handle (order of the pack in the truck)

optional="hidden"

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

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?

~~Define by Grouping~~ Contact? Carrier? Destination Country?

Wave Grouping Product Category Location

products partially available v

Maximum ~~lines~~ per batch? 0 lines

Maximum ~~transfers~~ per batch? 0 transfers

Maximum weight per batch? 0 kg

Auto-confirm

if Locations checked, add a many2many_tags below:
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. WH/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 sublocation	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			WH/Stock	Closest		My Company (San Francisco)
					No		

Placeholder: All Products

Placeholder: All Categories

Allow to do a rule without Product & Category

invisible IF sublocation=no

default to No

Revamped barcode app

Mobile app header with status bar (11:11), back arrow, "Batches" title, "YourCompany" logo, and a barcode icon.

Instructional banner: "Scan a transfer, product, lot or package to filter your records"

Navigation: "New" button, "1-3 / 3" indicator, search icon, and left/right arrows.

- ☆ BATCH/0001 In progress
Batch description
Wood Corner 26/04/2024
- ☆ BATCH/0002 In progress
Batch description
Wood Corner 26/04/2024
- ☆ BATCH/0003 In progress
Batch description
Wood Corner 26/04/2024

Mobile app header with status bar (11:11), back arrow, "WH/PICK/0002" title, "Azure Interior" location, barcode icon, and settings gear.

Instructional banner: "Scan product or package"

Location: WH/Stock

Product Card 1:
FURN_6741 Custom Table
WH/Packing zone
1/4000 Units +3999

Product Card 2 (highlighted):
FURN_6741 Custom Table
WH/Packing zone
1 Units +1

Location: WH/Droparea

Buttons: Add product, Validate

Mobile app header with status bar (11:11), back arrow, "WH/PACK/0002" title, "Azure Interior" location, barcode icon, and settings gear.

Product Card:
FURN_6741
Large Meeting Table

Quantity: 698 / 999 Units

Buttons: 0, -1, +1, +301

Buttons: Pack +5 Units, Pack +10 Units

Source location: WH/Packing Zone

Destination location: WH/Out

Source Package:

Buttons: Discard, Confirm

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 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			

UI Revamp

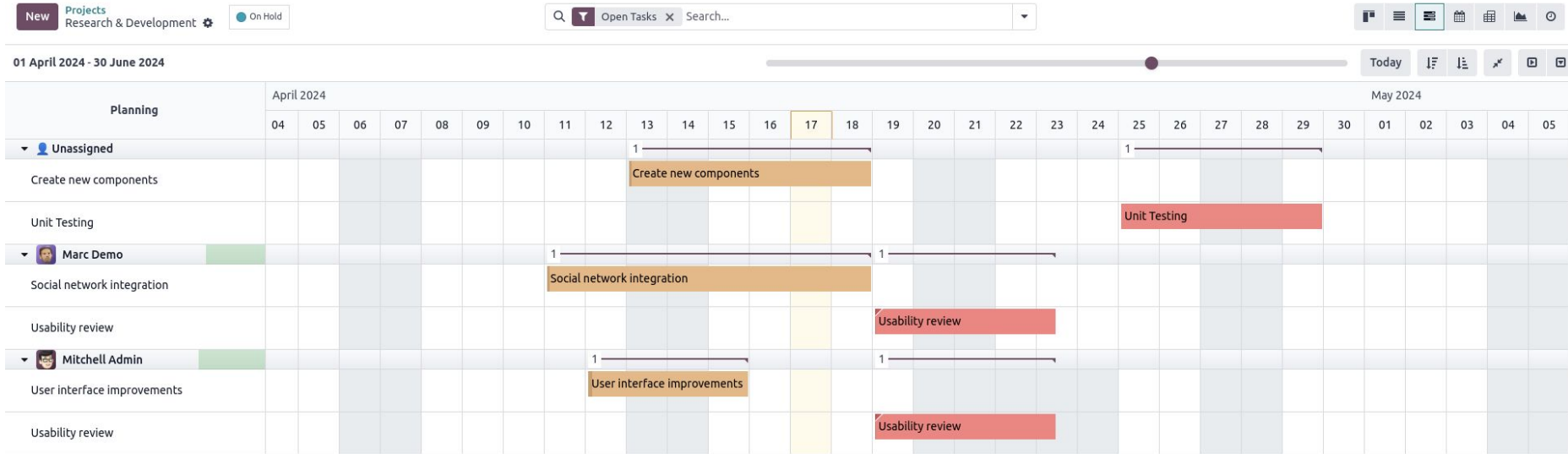
Automatic Replenishment + Flexible Route

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 is a navigation bar with tabs for 'Inventory', 'Overview', 'Operations', 'Products', 'Reporting', and 'Configuration'. The current page is 'Inventory Overview / YourCompany: Receipts' for item 'WH/IN/00007'. A red arrow points from the 'Quality Checks' button in the top navigation bar to a dialog box titled 'On-Demand Quality Check'. The dialog box contains a 'Product' dropdown menu, a 'Quality Check Point' input field, and a 'Confirm' button. The background interface shows a 'Validate' button, 'Record comments', 'Print', 'Print Labels', and 'Cancel' buttons, along with a 'Draft' status and 'Ready'/'Done' buttons. The main content area shows 'WH/IN/00007' with a star icon, 'Receive From: YourCompany - To: Willis', and 'Scheduled Date: 05/15/2024 02:00:00'. Below this, there are tabs for 'Operations' and 'Additional', and a 'Product' section showing '[FURN_8888] Office Lamp' and an 'Add a line' button.


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) v


Fold/Unfold Instructions


All MO 1 | My WO 0 | Assembly 1 0

WH/MO/00012 - Packing ▶
[FURN_8855] Drawer - 5 Units

Worksheet 

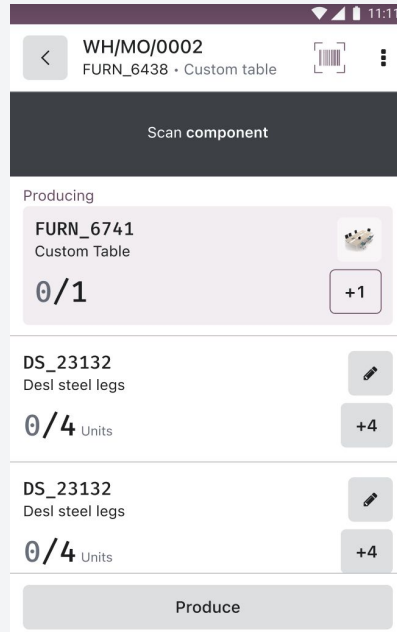
Register Production 

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

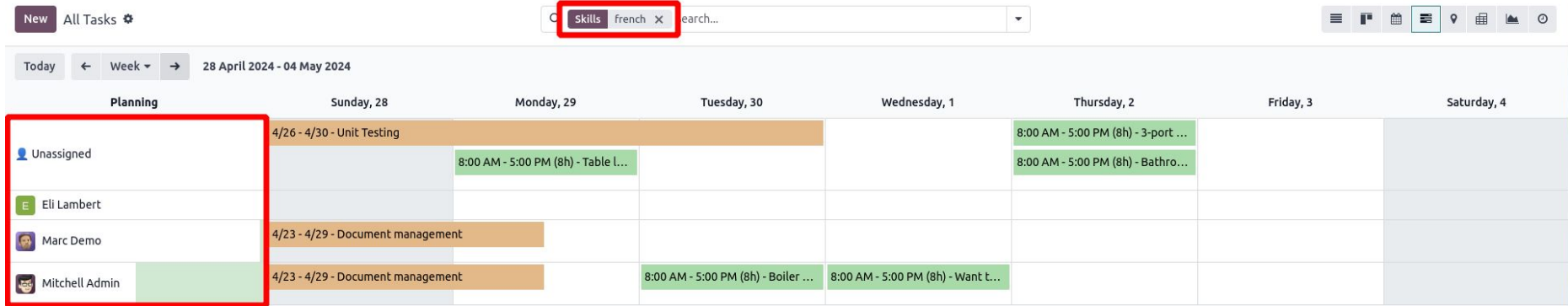


Top bar to browse related project records

The screenshot shows a project management interface with a top navigation bar and a main workspace. The top bar is highlighted with a red box and contains the following tabs: **Tasks**, **Project Updates**, **Timesheets**, **Planning**, **Documents**, **Sales Orders**, **Invoices**, and a dropdown arrow. Below the top bar, there is a search bar with the text "Open Tasks" and a search icon. The main workspace is divided into three columns: **New** (5 items), **In Progress** (3 items), and **Done** (3 items). Each column contains a list of project tasks with details such as assignees, time estimates, and status indicators.

Column	Count	Task Name	Assignee	Time Estimate
New	5	Kitchen Assembly	Deco Addict	
		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	
		Junior Architect (Invoice on Timesheets)	Deco Addict	03:00
		Senior Architect (Invoice on Timesheets)	Deco Addict	05:00
Done	3	Planning	Deco Addict	
		Decoration	Deco Addict	
		Senior Architect (Invoice on Timesheets)	Deco Addict	00:00

Find the right people based on their skills



Tracking revisions in tasks

The screenshot shows a web application interface for task management. The main page displays details for a project named 'Kitchen Assembly' under the 'AGR - 500080 - Sales Order' project. The task description is currently empty, showing placeholder text. A modal window titled 'Task Description History' is open, showing a list of revisions. The first revision is from 04/17/2024 at 14:34:58 by Mitchell Admin. The second revision is from 04/17/2024 at 14:33:53 by Mitchell Admin. The modal also shows a comparison view of the text changes between revisions, with red and green highlights indicating the differences. At the bottom of the modal, there are buttons for 'Restore history' and 'Discard'.

Project: AGR - 500080 - Sales Order
Kitchen Assembly

Start

Kitchen Assembly

Project: AGR - 500080 - Sales Order

Milestone: Cabinets

Assignees: Mitchell Admin

Tags

Description Timesheets Sub-tasks

Task Description History

Content Comparison

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

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

Content

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 nisl. 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 duis 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-masterallrunbot181.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

Customer

Ready Mat, Travis Mendoza

Worksheet Template ?

Device Installation and Maintenance

7500 W Linne Road

Tracy CA 95304

United States

Assignees

Under Warranty ?



→ [View Itinerary](#)

Tags

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%)

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 dashboard is divided into four main 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:** Prompts to 'Connect your bank. Match invoices automatically.' It shows a search for '36 000 banks' and a grid of bank logos including Isabel 6, PayPal, Santander, Citigroup, and others. A 'Record transactions manually' link is at the bottom.
- Cash:** Features 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...	Active account	05/01/2024	07/31/2024	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

Not locked

to lock invoices

← block sales journal

Lock Purchases

Not locked

to lock bills

← block vendor journal

Lock Tax Return

Not locked

after a tax closing

Lock Everything

Not locked

but allow exceptions

Hard Lock

Not locked

to ensure inalterability

Apply

Discard

Reconciliation : Kanban quick create

The screenshot shows a software interface for bank reconciliation. The top navigation bar includes 'Accounting', 'Dashboard', 'Customers', 'Vendors', 'Accounting', 'Reporting', and 'Configuration'. The user is logged in as 'My Company (San Francisco)'. The main area is titled 'Bank Reconciliation' and shows a balance of \$9,944.87. A date selector is set to '05/07/2024' with a currency of 'USD'. A search bar contains 'Journal Bank X'. The interface is divided into two main sections: a summary table on the left and a detailed journal entry table on the right. Red annotations highlight specific features: 'New' button, 'Only in multicurrency Default is journal currency', 'Add & New' and 'Add & Close' buttons, and a 'Go to Backend' button.

Summary Table:

Date	Description	Amount
05/07/2024	R9772938 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

Journal Entry Table:

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 \$ 34.78 - 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

... 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

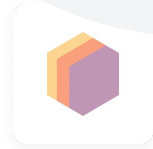
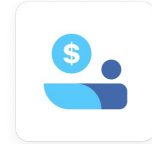
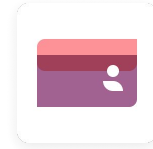
2/ Model updates

- 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 the 'Attendances' management interface. At the top, there are navigation tabs: 'Attendances', 'Overview', 'Kiosk Mode', 'Reporting', and 'Configuration'. A search bar contains 'Employee X Search...'. A notification in the top right corner 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 listed in the grid, with a red arrow pointing to a grey cell at 11am. A red note next to the name says 'grey is not supposed to work (based on workingn schedule or time off)'. In the center, a kiosk screen displays a login interface with a red box around the 'Login' button. Below the kiosk is a purple button labeled 'Try the kiosk'. To the right, a kiosk screen shows a green 'Arrivée' button with a red dot above it. A red arrow points to the red dot with the text 'Animated: change of status'. Below this is a purple button labeled 'Try the top • icon (e.g. work from home)'. At the bottom, there is a red line with 'or' in the center, followed by the text 'Try the backend and reporting:' and a grey button labeled 'Load Sample Data'. A 'Go to Backand' button is in the bottom right corner.

Ready to track attendances?

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

Animated: change of status

Try the kiosk

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

Try the backend and reporting:

Load Sample Data

Go to Backand

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

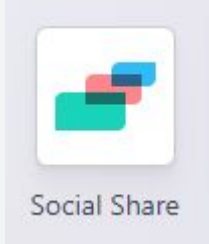
L10N

- **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.

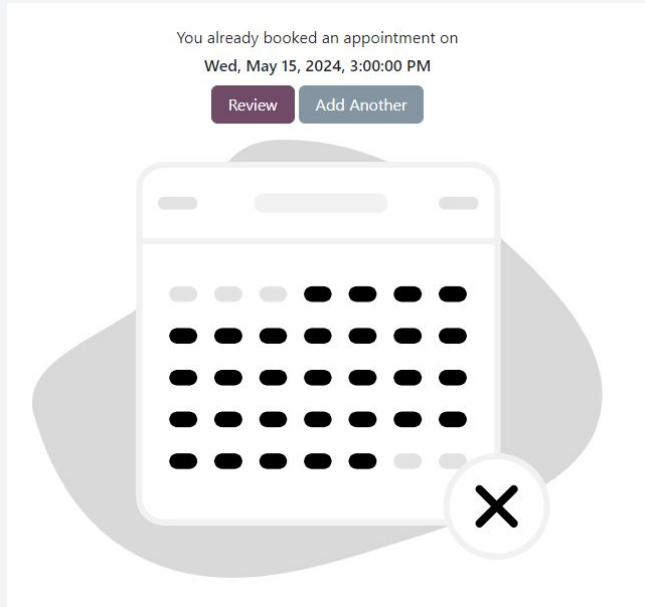
Better WhatsApp tools

WhatsApp added in a lot of flows (Inventory, Marketing Automation, ...)

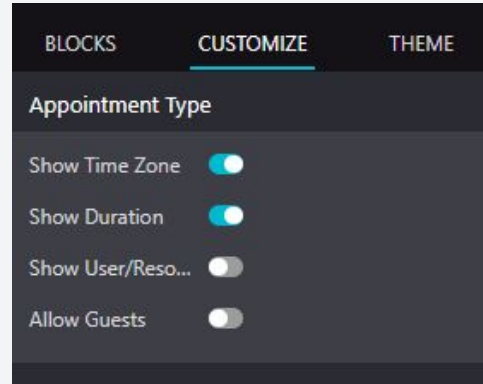


Appointment

- 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...

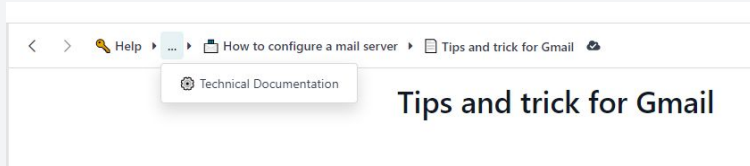
- A lot of Social Improvements
 - Design your Marketing opt-out page
 - Define the visibility of your Event (via a link public or logged users only)
 - See who clicked in your Mailings
 - Better Mail Composer
 - New Marketing Automation onboarding
 - Easier Mail Server configuration
- ... and a ton of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


 Knowledge



Knowledge made easier

- Clearer Navigation: Always locate your article 



- Insert Excalidraw Scenes into Articles 

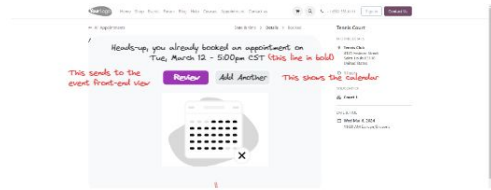
Purpose

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

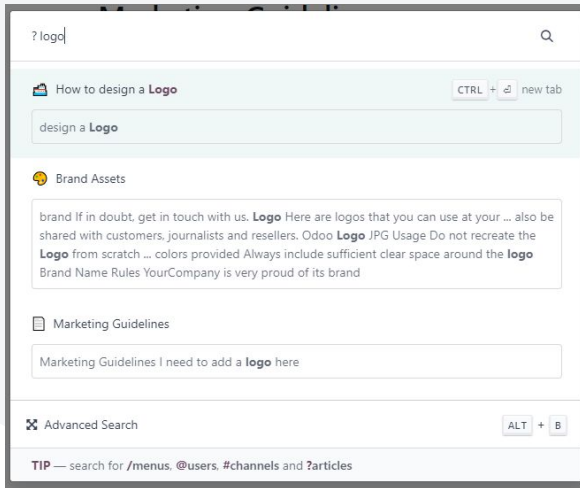
Functional Specifications

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

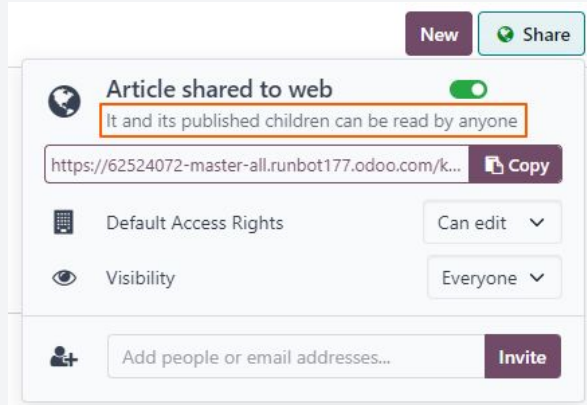


- Search inside your Articles 




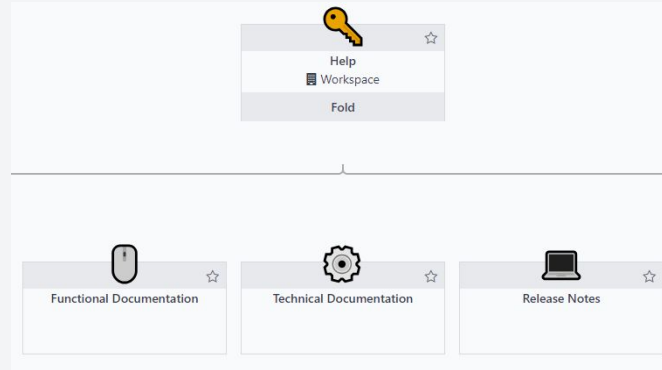
But also...

- Better Publishing Access 




A screenshot of a document sharing interface. At the top right are 'New' and 'Share' buttons. Below is a card for 'Article shared to web' with a green toggle switch. A red box highlights the text 'It and its published children can be read by anyone'. Below this is a URL field with a 'Copy' button. Further down are settings for 'Default Access Rights' (set to 'Can edit') and 'Visibility' (set to 'Everyone'). At the bottom is an 'Add people or email addresses...' field with an 'Invite' button.

- Hierarchy View 



A screenshot of a hierarchy view. The top level shows a 'Help' folder with a key icon and a 'Workspace' folder with a folder icon. Below these are three main categories: 'Functional Documentation' with a mouse icon, 'Technical Documentation' with a gear icon, and 'Release Notes' with a laptop icon. Each category has a star icon for favorites.

...and a lot of other improvements! 

Spreadsheet & Dashboards



Comments on cell

Documents Documents Configuration

Documents Pipeline dashboard ☆

File Edit View Insert Format Data

≡ 100% .00 123 ▾ 10 ▾ B I U A ↕ ↗ =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			
Total	13.00	290,100.00			7,500.00

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
August 2024		10,000.00
September 2024		10,000.00
October 2024		10,000.00

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 displays a spreadsheet application interface. At the top, there are menu options: Documents, Configuration, and My Company (San Francisco). Below the menu is a toolbar with icons for file operations and a formula bar. The main area shows a pivot table with the following data:

	Sales	Pre-Sales	Website	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	\$911.35			\$911.35
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

In the center of the screen, there is a text box with the following content:

Edit dynamic pivots in order to add or edit:

- dimensions
- measures
- domain

On the right side, a 'Pivot properties' panel is open, showing the configuration for the pivot table. The panel includes sections for Pivot name, Model, Columns, Rows, Measures, and Domain. The 'Pivot name' is '(#1) Sales Orders by Order Date'. The 'Model' is 'Sales Order (sale.order)'. The 'Columns' section shows 'Sales Team' with 'Order by' set to 'Automatic'. The 'Rows' section shows 'Order Date' with 'Granularity' set to 'Year' and 'Order by' set to 'Automatic'. The 'Measures' section shows 'Total' with 'Aggregated by' set to 'Average'. The 'Domain' section shows 'Match all of the following rules:' with 'Salesperson = uid' and 'Defer updates' checked. The 'Sum' dropdown is set to 'Sum'.

Data tables

Documents Documents Configuration

Documents Untitled spreadsheet ☆

File Edit View Insert Format Data

10 % .00 123 B I G A

(#1) Sales Orders by Order Date	Sales	Pre-Sales	Website	Total
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	\$962.50	\$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	\$962.50	\$210.83	\$11,798.01

Use **data tables** to quickly:

- sort
- style
- filter
- add new records

Edit table

Style options

Header row(s) 1 First column

Total row Last column

Banded rows Banded columns

Filter button

Data range

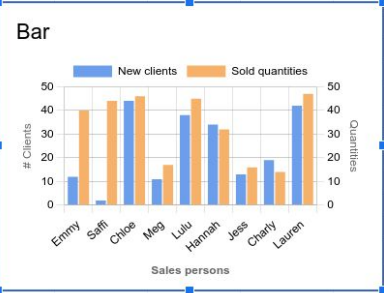
A1

Automatically autofill formulas

Auto-adjust to formula result

Delete table

New charts & options



Bar

Sales persons	New clients	Sold quantities
Emmy	12	40
Saffi	2	42
Chloe	42	45
Meg	10	18
Lulu	38	45
Hannah	32	32
Jess	15	15
Charly	20	15
Lauren	42	45

Chart [X]

Configuration [X] Design [X]

General

Background Color [X]

Chart Title: Bar

Legend position: Top

Data Series

New clients

Background Color [●]


Vertical axis: Left

Serie name: New clients

Axis

Horizontal axis

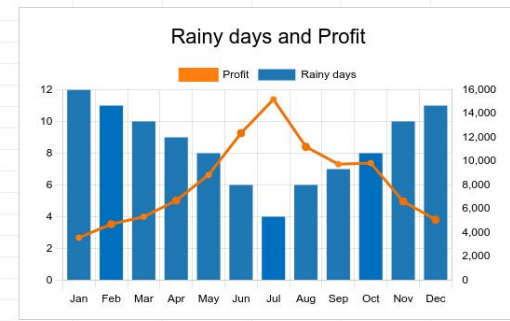
Axis Title: Sales persons



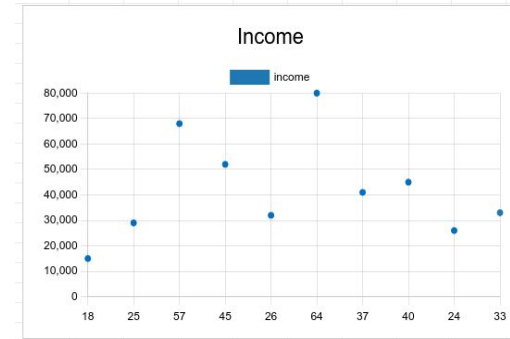
Combo

Sales persons	Sold quantities	Predicted sales amount
Emmy	40	38
Saffi	42	45
Chloe	45	35
Meg	18	32
Lulu	45	35
Hannah	32	32
Jess	15	20
Charly	15	10
Lauren	45	45

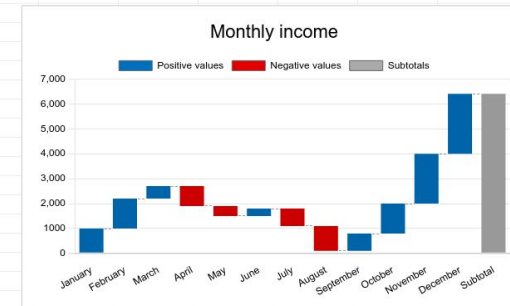
Enhanced Customization



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 interface for a document titled 'S00063 - Plumbing Services'. A context menu is open over the document, with the 'Request Signature' option highlighted in red. The menu includes options such as Print, Archive, Duplicate, Delete, Add Properties, Restore History, Request Signature, Share Task, Send SMS Text Message, Convert to Task/Sub-Task, Convert to Ticket, and Send Report. The document details show it is in the 'In Progress' state, with a customer named 'Deco Addict' and a sales order item 'S00063 - Plumbing Services (Deco Addict)'. The allocated time is 00:00 (0%). The right sidebar shows a chat history with messages from OdooBot, including a message about the reception of the document and a notification that the task has been created from the document.

Project Projects Tasks Reporting Configuration

New Projects / Home Construction
S00063 - Plumbing Services

\$ Sales Order

1 / 10

Start

S00063 - Plumbing Services

Project Home Construction

Milestone Piping Installation

Assignees Marc Demo

Tags

Description Timesheets

Add details about this task...

Print

Archive

Duplicate

Delete

Add Properties

Restore History

Request Signature

Share Task

Send SMS Text Message

Convert to Task/Sub-Task

Convert to Ticket

Send Report

New 6h In Progress Done ...

Send message Log note WhatsApp Activities

Today

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**

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 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

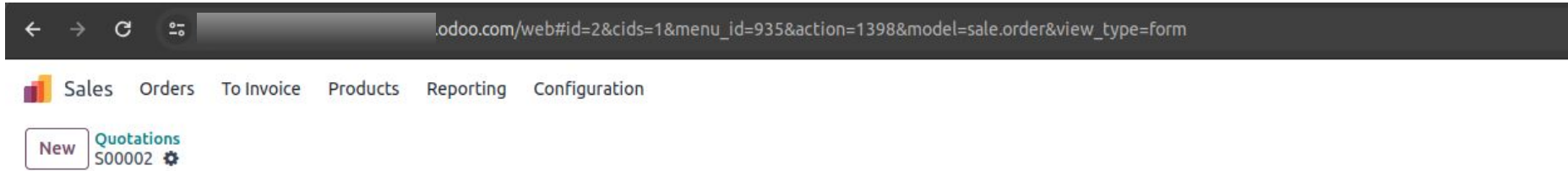


Framework

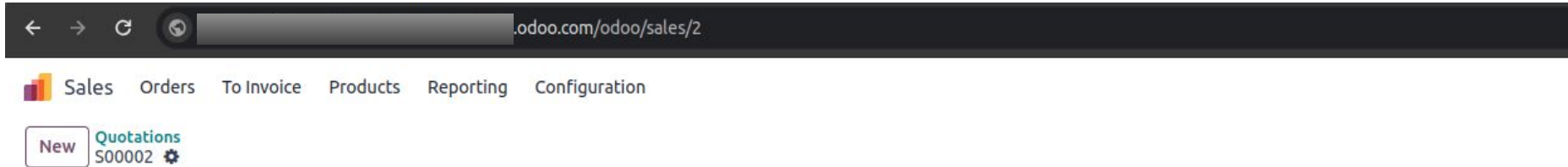


Nice URLs

Before

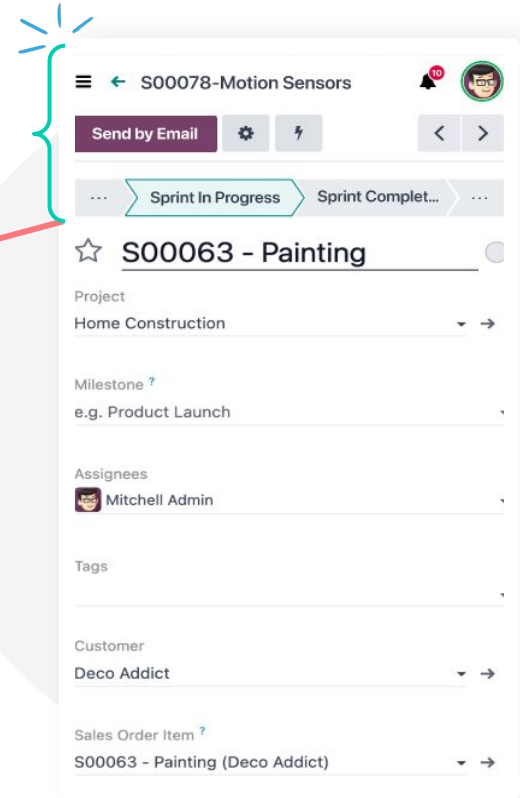
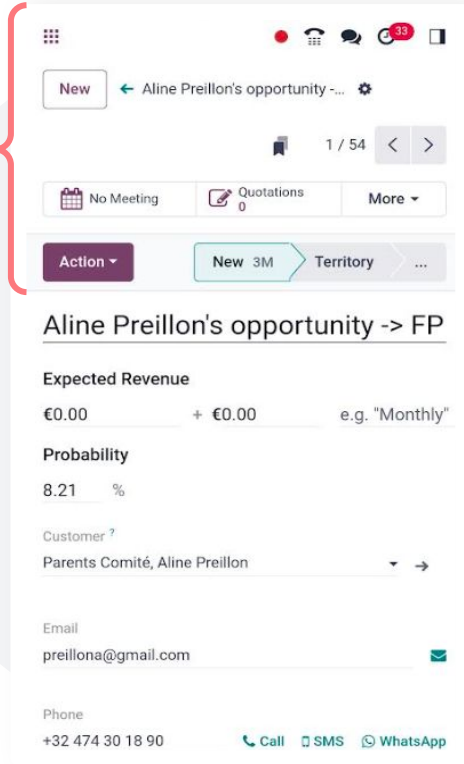


After



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
chkl@odoo.com



/odoo



@odoo.official

Slides
<http://tiny.cc/odoo18>