

The background features a complex, low-poly geometric pattern in shades of teal, purple, and yellow. A thin, light-colored grid is overlaid on the pattern. A large, thin, light-colored circle is centered on the page, framing the text.

Odoo Training Part I

Understanding Odoo's Purpose

What is Odoo?

- **Purpose:** Odoo is our ERP and CRM platform, supporting a variety of business applications, including project tracking, client management, and task management.
- **Usage:** Odoo integrates various business processes into one system, allowing team members to manage tasks, track project timelines, and update client information. This is an essential platform for project oversight and client management, providing insights into performance and progress.



Odoo Log In Screen

<https://solar-service-guys-lg.wilddooit.net/web/login>

Email

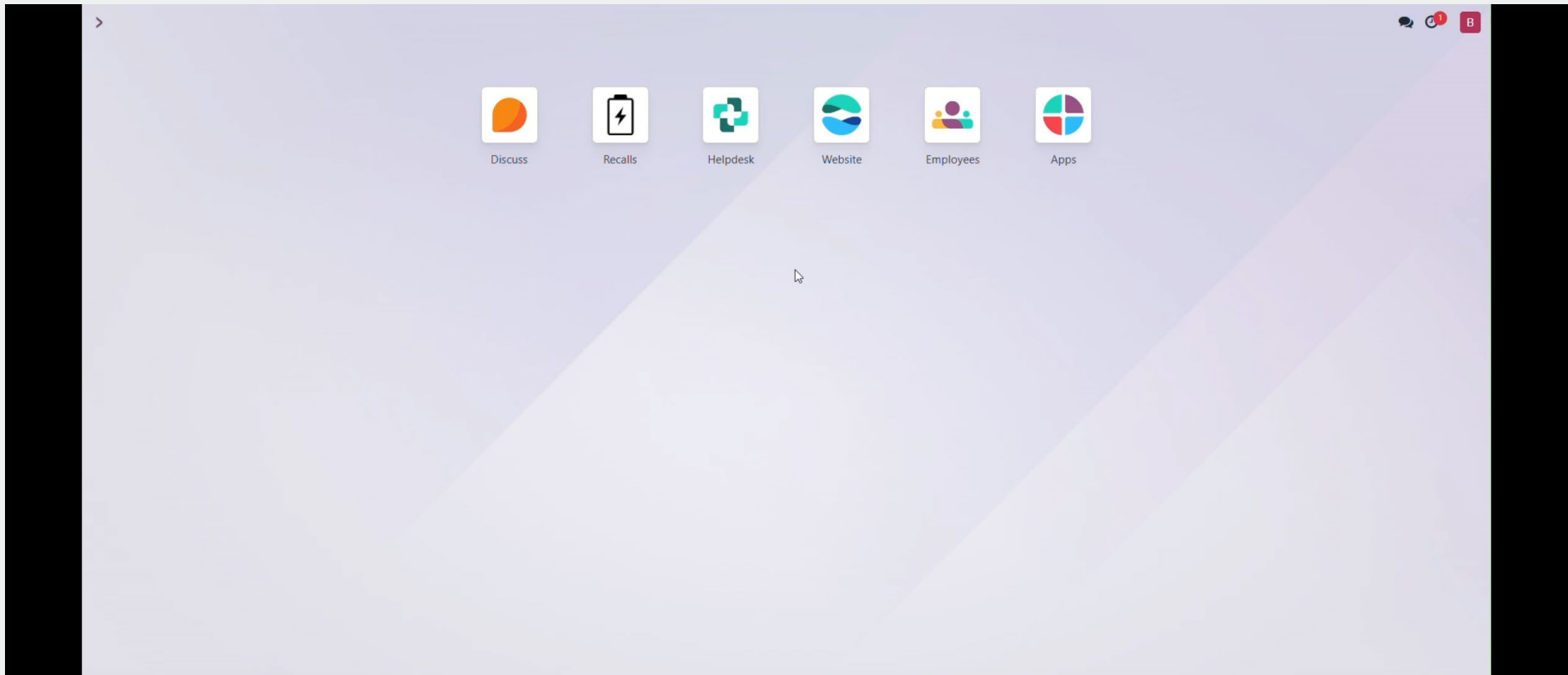
Password

Log in

[Log in as superuser](#)

Key Elements of the Homepage:

- **Main Dashboard:** Displays available modules; you can click any module to open it.
- **Navigation Bar:** Found at the top of the screen, it includes the search bar, app launcher, and quick access to recent items.
- **User Menu:** Located at the top right; click your profile icon to access user settings, preferences, and logout options.
- **Notifications:** Alerts you to important updates or pending tasks.



Saving and Discarding Changes in Odoo

- **Auto Save on Navigation:** Changes are saved automatically when you leave a screen.
- **Manual Save:** Click the save icon (top left) to save changes anytime without leaving the screen.
- **Discard Changes:** Use the discard icon to revert all changes on the screen to the original state.
- **Tip:** Use manual save for important updates, and review before discarding to avoid losing edits.

<input type="checkbox"/>	Name	Serial Numb...	Customer	Customer Address	Lead Source	Stage	Phone	↕️
<input type="checkbox"/>	Neil Watson(Owner of Property) Carol Marra(Archi...	1 record	Neil Watson(Owner of Property) Carol Marra(Archi...	12 Ashley St, Tamarama NSW 4700, Australia	Television Advertisement	SSG Recall (End User)	0414370093	
<input type="checkbox"/>	David Morgan - Skyline Solar	2 records	David Morgan	15 Colvin St, Hughes ACT 3199, Australia	Television Advertisement	No Further Action		
<input type="checkbox"/>	Leanne Carol	1 record	Leanne Carol	100 Dargin Rd, Maria Creeks QLD 3172, Australia	Word of Mouth	No Further Action		
<input type="checkbox"/>	Lg Mobile App - Chris Morhee	1 record	Chris Morhee	5 Holdsworth Rd, North Ipswich QLD 4305, Australia	Television Advertisement	No Further Action	0431 423 906	
<input type="checkbox"/>	Adam Eastes	2 records	Adam Eastes	158 Saxby Rd, Ballandean QLD 4342, Australia	Letter from the ACCC	No Further Action	0421 806 135	
<input type="checkbox"/>	Rebecca Light	1 record	Rebecca Light	61 Farm Rd, Diggers Rest VIC 4879, Australia	Letter from the ACCC	SSG Recall (End User)	0412 700 228	
<input type="checkbox"/>	David Ware - Marc Lemke Electrical	2 records	David Ware	1950 Peshurst road, Hawkesdale VIC 3287, Austr...	Newspaper Advertisement	No Further Action	0429 607 224	
<input type="checkbox"/>	Karen and Mark Scrusse	7 records	Karen and Mark Scrusse	lot 29/162 N Curramore Rd, Curramore NSW 4350...	Established Customers - Pre 2024	No Further Action	0413 903 554	
<input type="checkbox"/>	Lg Mobile App - Ryan Martin	1 record	Ryan Martin	16 Kew Rd, Laurieton NSW 6311, Australia	Television Advertisement	No Further Action	0460 680 367	
<input type="checkbox"/>	Ron Hoenig - Track Energy	1 record	Ron Hoenig	6 Grange Road, Hawthorn SA 5000, Australia	Awaiting Lead Source from Custom...	No Further Action	0419 183 214	
<input type="checkbox"/>	Greg Welsh -	No records	Greg Welsh	260 Cundare-Duverney Rd, Cundare North VIC 32...	Awaiting Lead Source from Custom...	Contact Tracing (End User)		
<input type="checkbox"/>	Sam Sneyd	2 records	Sam Sneyd	23 Church St, Glen Innes NSW 4710, Australia	Established Customers - Pre 2024	SSG Recall (End User)	0409 105 200	
<input type="checkbox"/>	Mathew Frederiksen	1 record	Mathew Frederiksen	21 Crawfords Ln, Rous Mill NSW 2477, Australia	Call Centre Cold Call	No Further Action	0468 997 006	
<input type="checkbox"/>	Shane Marks - Green power	2 records	Shane Marks - Green power	567 Nyora-st Helier Rd, Woodleigh VIC 3978, Aust...	Original Installer	No Further Action		
<input type="checkbox"/>	Keith Chandler - (Immolec - Cameron Algate)	8 records	Keith Chandler	2142 Womblebank Gap Rd, Hutton Creek QLD 44...		SSG Recall (End User)	0428 261 463	
<input type="checkbox"/>	Jason Santos - Voltaic Ind (now Inspire Energy / H...	1 record	Jason Santos	8 Mustard Ct, Edmondson Park NSW 2324, Australia	LG Email or Letter	No Further Action		
<input type="checkbox"/>	Shane Veivers	2 records	Shane Veivers	16 Hamilton St, Sherwood QLD 6053, Australia	Established Customers - Pre 2024	Software Update (End User)		
<input type="checkbox"/>	Chris Rice	1 record	Chris Rice	55 Hausen Ct, Banjup WA 6164, Australia	Awaiting Lead Source from Custom...	No Further Action		

Searching in Odoo

Using the Search Bar:

- Located at the top of every module, the search bar allows you to type in keywords to quickly locate records.
- Odoo suggests possible matches as you type, making it easier to find specific records.

Applying Filters and Grouping Options:

- **Filters:** Narrow down search results by selecting filters such as customer status, date range, or tags.
- **Group By:** Group records by specific fields (e.g., status, assigned user) to organize data more effectively.
- **Custom Search Filters:** Create and save custom filters for frequently used searches.

Saving Frequent Searches:

- You can save custom search filters to avoid repeating search setup every time.
- Saved searches are accessible from the search bar, making routine tasks faster and more efficient.

Recalls Recall Contacts

New Tracing

Search...

1-80 / 10000+

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Different Views

Overview of Different Data Views:

- **List View:** Displays data in rows, ideal for viewing and sorting multiple records at once.
- **Kanban View:** A card-based view, often used for visualizing workflows or tasks in progress.
- **Calendar View:** Displays records by date, useful for scheduling and deadline management.
- **Graph View:** Presents data in graphs, charts, or pivot tables for analysis.

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