

USER MANUAL



Clever Multiple Sales Order / Quotation Templates

Version: 1.4

Compatibility:

Odoo 8.x, 9.x, 10.x, 11.x, 12.x

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Introduction

AppJetty is introducing an excellent app to manage multiple reports of Odoo store creatively. Clever Multiple Sales Order / Quotation Templates app will aid you to maintain your reports in a superior way. Admin can set layout of the reports in multiple ways.

There are inbuilt 6 types of report configurations for the references. Admin can change them the way it is required. Admin can view Payment History in the invoice to keep a check of order details. Admin can set Text Colors, Company Details Colors and also can add product description in the Invoice. Admin can choose diverse colors with Color Picker.

Admin will be able to manage templates of Invoices, Sales Orders, Purchase Orders, Request for Quotation, Delivery Notes and Item Pick up Notes.

Benefits of Clever Multiple Sales Order / Quotation Templates

- Manage Styles of All Report Fields
- Numerous Report Templates Styles
- Manage Various Report Types
- Configurable Report Templates
- Configurable Report Styles for Each Customers
- Default Template for Every Report
- Print Reports in Various Languages
- One Time Setup
- Fast Support

Installation

Installation Steps

Step 1: Download and extract the zip file.

Step 2: Check your Odoo add-ons path.

- It should be same as defined in OdooConfig file.
- Config files are mostly saved in /etc folder. For e.g. /etc/odoo.conf
- Open Config file:
 - Give the command: `sudo/etc/odoo.conf`
 - Config file content: `addons_path = /opt/odoo/addons`

Step 3: Open Terminal and go to download location

- For e.g. if the download location path is : /home/odoo/Downloads then the command to be written in the terminal would be: `cd/home/odoo/Downloads`

Step 4: Copy download modules to addons path

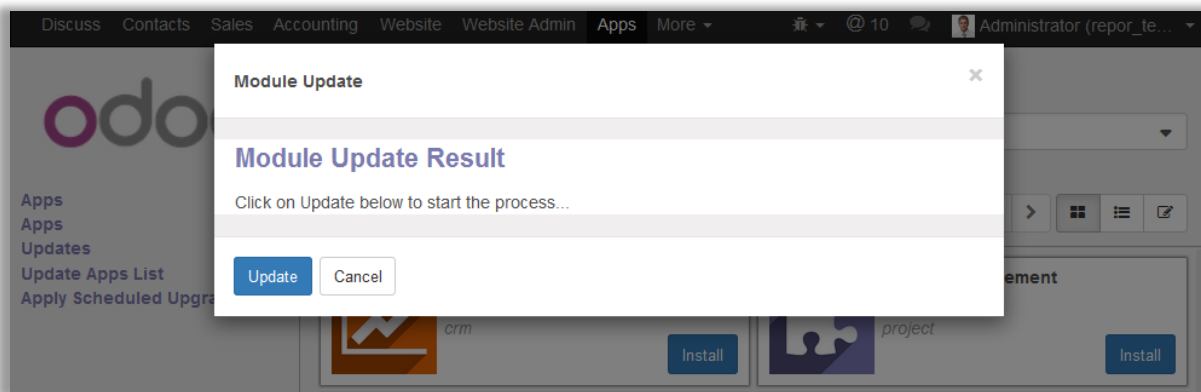
- Give the below mentioned commands to perform copy operation:
 - `$cd /home/odoo/Downloads/general_template`
 - `$cd v8`
 - `$sudocpgeneral_template/opt/odoo/addons`

Step 5: Restart Odoo server

Step 6: Login with the admin credentials in your Odoo instance.

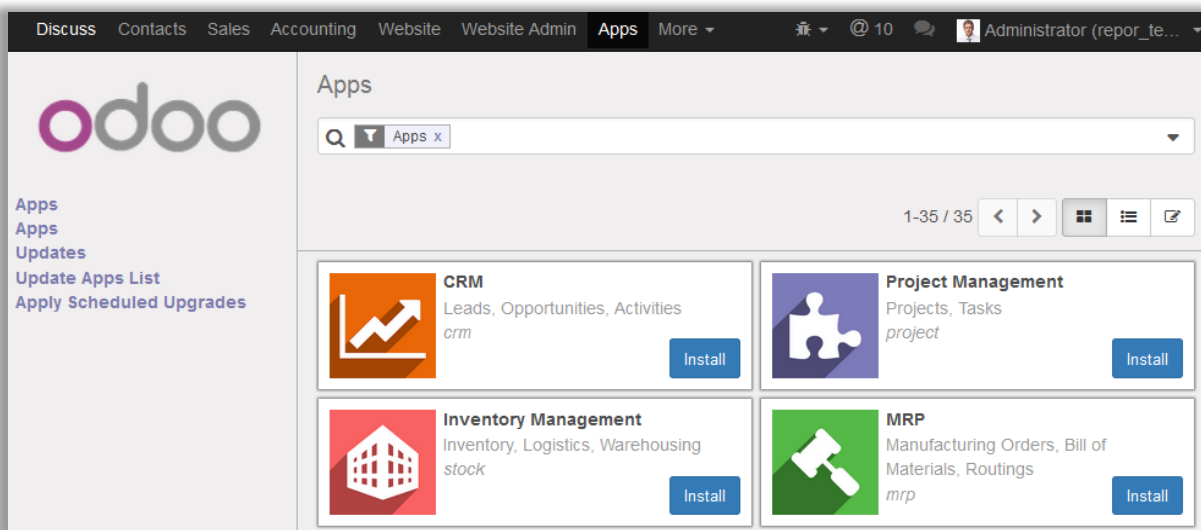
Step 7: Go to Apps/Update Apps List.

- Click on 'Update' button.

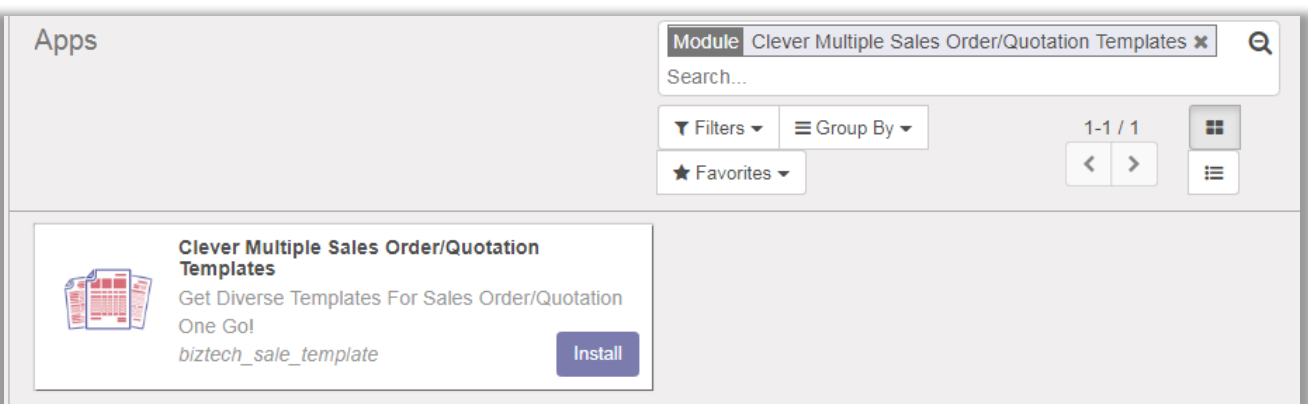


Step 8: Go to Apps

- Remove search filter.



- Enter module name in the search box provided in the top right corner of the page. For e.g. here write "Clever Multiple Sales Order/Quotation Templates".
- Click on 'Install' button.



App Configurations

Please follow below mentioned steps to configure the “Clever Multiple Sales Order / Quotation Templates” Odoo App.

Configuring Report Template

- Go to **Settings -> Companies**.
- Select Your Company and click on **'Report Configurations'**. Click on **'Edit'** to Edit the Template.

Set the Custom Footer

- To set Custom Footer Enable **'Custom Footer'**.
- Add the required Footer in Report **'Footer Box'**.
- Select the format of paper from **'Paper Format'** as required.

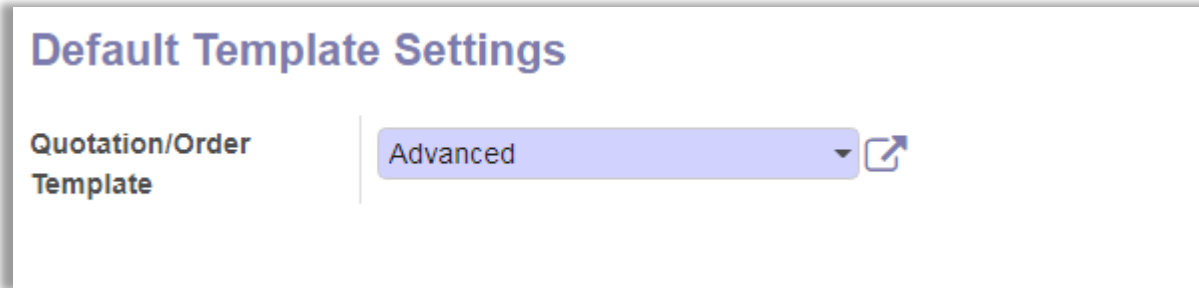


The screenshot shows the 'Configuration' window in Odoo. It has three main sections:

- Custom Footer:** A checkbox is checked, indicating that the custom footer is enabled.
- Report Footer:** A text area containing the footer text: "Phone: +1 555 123 8069 | Email: info@yourcompany.example.com | Website: http://www.example.com".
- Paper format:** A dropdown menu is set to "US Letter".

Set Default Template Settings

- To set the default template for the Quotation/Order Report, navigate to ‘Default Template Settings’ and choose the default template from ‘Quotation/Order Template’.

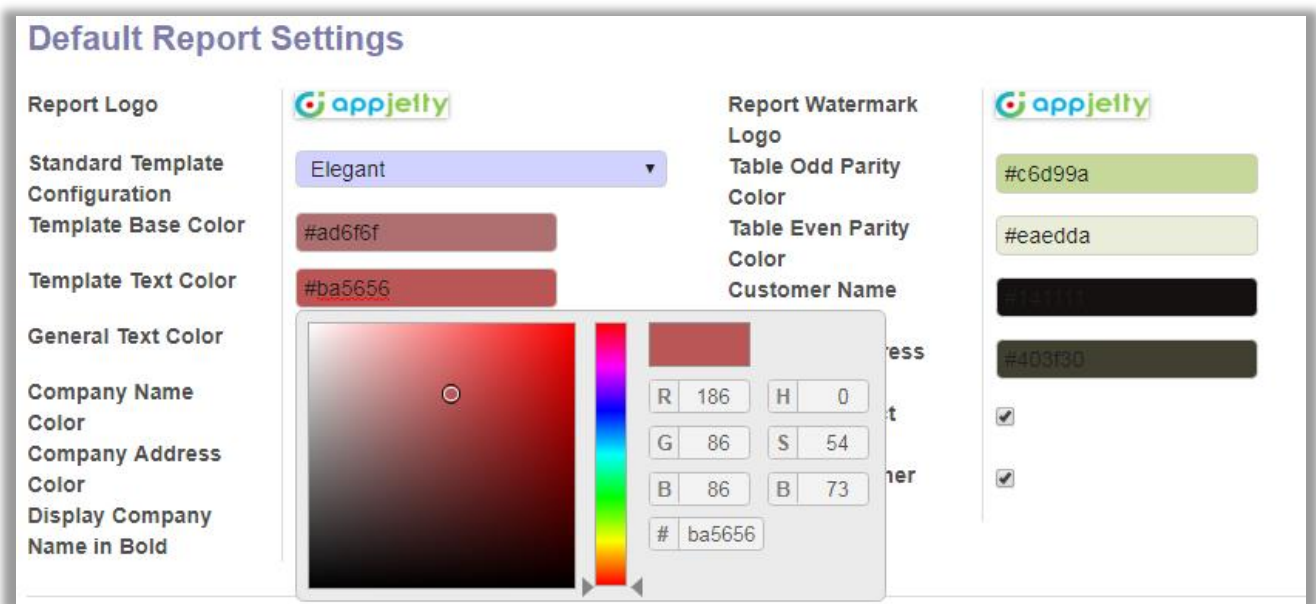


Set Default Report Settings



- To set the Default Report Settings navigate to ‘Default Report Settings’ section manage following options:
 - Standard Template Configuration:** Choose the default template for all the Quotation / Sales Order Reports from following 6 Options:
 - Contemporary
 - Elegant
 - Creative
 - Professional
 - Advanced
 - Exclusive
 - Report Logo:** Set the Report Logo for the Quotation / Sales Order Report.
 - Template Base Color:** Set the Template Base Color for the Quotation / Sales Order Report.

- **Template Text Color:** Set the Template Text Color for the Quotation / Sales Order Report.
- **General Text Color:** Set the General Text Color for the Quotation / Sales Order Report.
- **Company Address Color:** Set the Company Address Color for the Quotation / Sales Order Report.
- **Report Watermark Logo:** Set Watermark for the Quotation / Sales Order Report.
- **Table Odd Parity Color:** Set Table Odd Parity Color for the Quotation / Sales Order Report.
- **Table Even Parity Color:** Set Table Even Parity Color for the Quotation / Sales Order Report.
- **Customer Name Color:** Set the Customer Name Color for the Quotation / Sales Order Report.
- **Customer Address Color:** Set the Customer Address Color for the Quotation / Sales Order Report.
- **Display Product Description:** Enable 'Display Product Description' to display product description in the Quotation / Sales Order Report.
- **Display Customer Name in Bold:** Enable 'Display Customer Name in Bold' to display Customer Name in Bold in the Quotation / Sales Order Report.
- **Display Company Name in Bold:** Enable 'Display Company Name in Bold' to display Company Name in Bold in the Quotation / Sales Order Report.
- Admin can choose any color for the editable text fields with the color picker.



NOTE: Watermark feature is not provided for Odoo v8.0

Setting Different Template for Customers

- Go to Sales -> Customers.
- Select the customer for whom you want to set template and click on 'Edit' to set the default template for the selected customer.
- Now click on 'Report Configurations' and choose default template for Sales Order Template from 'Sales Order Template' dropdown list under 'Default Report Settings' section.

The screenshot displays the 'Agrolait' customer profile page. At the top, there is a header with the Agrolait logo, a radio button selection for 'Individual' and 'Company', and a status indicator 'Active'. To the right, there are summary statistics: '\$1,175.00 Invoiced' and '\$ 2 Sales'. The main content area is divided into several sections: 'Address' (69 rue de Namur, Street 2..., Wavre, State, 1300, Belgium), 'Phone' (+32 10 588 558), 'Mobile', 'Fax', 'Email' (agrolait@yourcompany.gmail.cc), 'Language' (English), 'Website' (http://www.agrolait.com), and 'Tags' (Components Buyer, Partner / IT Services). Below these fields are navigation tabs: 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', and 'Report Configuration'. Under the 'Report Configuration' tab, the 'Default Report Settings' section is visible, showing a dropdown menu for 'Sale Order Template' currently set to 'Contemporary'.

Printing the Reports

Printing Quotations / Sales Orders

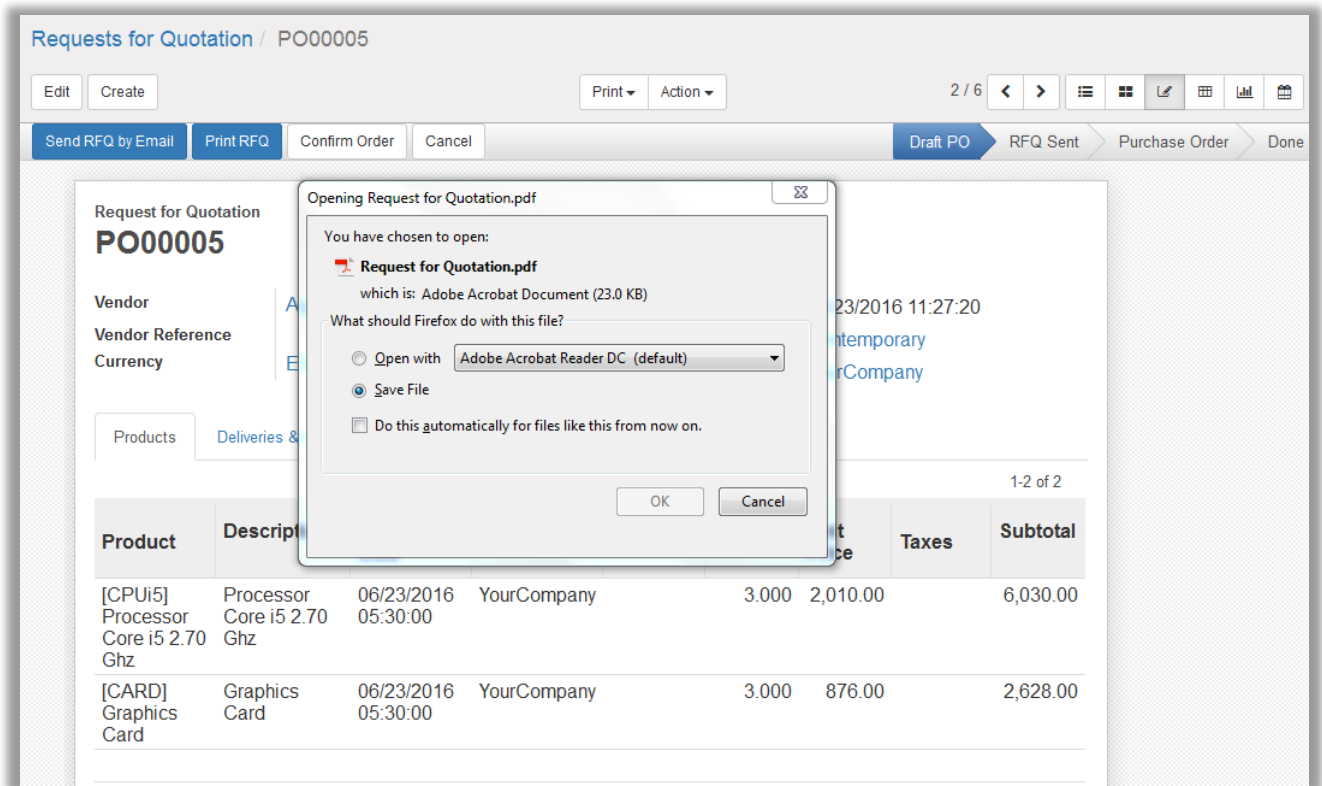
- Go to Sales -> Quotations.
- Select any Quotation that is to be printed.
- Click on 'Print' to print the Quotation / Sales Orders.

The screenshot shows a web application interface for managing quotations. The main header displays 'Dashboard / Quotations / SO007'. Below this, there are buttons for 'Edit', 'Create', 'Print', and 'Action'. A navigation bar includes 'Create Invoice', 'Print', 'Send by Email', 'Cancel', 'Quotation / Order', 'Quotation', 'Quotation Sent', and 'Sales Order'. The main content area shows details for quotation 'SO007', including customer information, a table of order lines, and a summary of taxes and amounts. A modal dialog titled 'Opening Quotation_Order.pdf' is open, asking the user what they want to do with the file. The dialog offers three options: 'Open with Adobe Acrobat Reader DC (default)', 'Save File', and 'Do this automatically for files like this from now on'. The 'Save File' option is selected.

Product	Unit Price	Taxes	Subtotal
[LAP-E5] Laptop E5023	2,950.00		14,750.00
[PROD_DEL] Switch, 24 ports	18.00		18.00
[CONS_DEL01] Server	173.00	TAX 20%	173.00
[PROD_DEL02] Datacard	40.00	Tax 15.00%	40.00
Untaxed Amount :			\$14,981.00
Taxes :			\$40.60

Printing the Request for Quotation

- Go to **Purchases -> Request**.
- Select any Quotation that is to be printed.
- Click on **Print -> Request** to print the particular Request for Quotation.



Keep a Track of Payment History

- Admin has the facility to stay up-to-date with all the payments provided by customer for the products bill with Clever Multiple Sales Order / Quotation Templates.

Sr.	Description	Quantity	Unit Price	Taxes	Price
1	[A2323] iPad Retina Display 7.9-Inch (Diagonal) LED-Backlit, 128Gb Dual-Core A5 With Quad-Core Graphics FaceTime HD Camera, 1.2 MP Photos	100.000	750.00		\$ 75,000.00
2	[BASICCOMP] Basic Computer Dvorak Keyboard Left-Handed Mouse	1.000	23,500.00		\$ 23,500.00
3	[GRAPs/W] GrapWorks Software Full Featured Image Editing Software.	1.000	173.00		\$ 173.00
4	[DSKLM12] Desktop Lamp	1.000	180.00		\$ 180.00
5	[DELL15] Dell Inspiron Laptop Without OS	1.000	44,000.00		\$ 44,000.00
6	[INK] Ink Cartridge	1.000	65.00		\$ 65.00
7	[M-Opt] Mouse, Optical	1.000	14.00		\$ 14.00
8	[TONER] Toner Cartridge	1.000	70.00		\$ 70.00
SubTotal					\$ 143,002.00
Taxes					\$ 0.0
TOTAL					\$ 143,002.00

Payment History				
Sr.	Date	Method	Ref.	Amount
1	20-04-16	Cash	CSH1/2016/0004	50000.0 \$

Bifurcate Duplicate Bills

- When duplicate invoices are generated, **DUPLICATE** will be displayed on the top header.

DUPLICATE



Your Company
 1725 Slough Ave., demo
 Scranton, Pennsylvania, 18540, United States
Mobile: 89665 222
Email: info@yourcompany.example.com

Invoice To:
Agrolait, Thomas Passot
 69 rue de Namur, Stree 2 2 fsds
 Wavre, 1300, Belgium
Email: thomas.passot@agrolait.example.com

Invoice No:

Invoice Date: 14-04-16

SO:


Order Date:

Due Date: 14-05-16

Sr.	Description	Qunality	Unit Price	Taxes	Price
1	[A2323] iPad Retina Display 7.9-inch (diagonal) LED-backlit, 128Gb Dual-core A5 with quad-core graphics FaceTime HD Camera, 1.2 MP Photos	1.000	750.00		\$ 675.00
SubTotal					\$ 675.00

Print Report in Various Languages

- With Clever Multiple Sales Order / Quotation Templates admin will be able to print report in various languages like French (Francis), German (Deutsch) & Arabic based on Customer’s set language.



FACTURE

YourCompany
 YourCompany , YourCompany , 1725
 Scranton, Pennsylvania, 18540, États Unis
 Courriel : info@yourcompany.example.com

Facture Pour:
 Agrolait
 69 rue de Namur
 Wavre, 1300, Belgique
 Courriel : agrolait@yourcompany.example.com

NumFacture: INV/2016/0006

Date De La Facture: Sunday 02 October 2016

La Description: SO011

SO: SO011

Date De La Commande: Monday 03 October 2016

Date D'échéance: Tuesday 01 November 2016

Sr.	La Description	Quantité	Prix Unitaire	Taxes	Prix
1	Down Payment Of 100.0%	1.000	1799.00		\$ 1799.00
Sous-Total					\$ 1799.00
TOTAL					\$ 1799.00

Historique De Paiement

Sr.	Date	Méthode	Ref.	Montant
1	Vendredi 14 Octobre 2016	Cash	CSH1/2016/0001	\$ 500.00
2	Vendredi 14 Octobre 2016	Bank	BNK1/2016/0005	\$ 799.00

• Terme De Paiement: 30 Jours Nets

Points to Note

- Watermark & Duplicate feature is not provided for Odoo v8.0
- Delivery Note Report is only available in v9.

Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-multiple-quotation-sales-order-templates.htm> and click on the Live Chat button for instant support.



- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional feature for **Clever Multiple Sales Order / Quotation Templates**, please write to sales@appjetty.com.