

USER MANUAL



Clever All In One Report Templates

Version: 2.2

Compatibility:

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

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Introduction

Odoo Clever All in One Report Templates is a perfect solution for you as it helps you to customize store reports based on your business requirements. With the help of Odoo All in One Report Templates app, you can effortlessly manage report creation in Odoo. Feel free to customize all the fields of your reports right from the company name to customer address!

Benefits of Clever All In One Report Templates

- It is an excellent app to manage multiple reports of Odoo store creatively. This app will help to maintain 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 and Request for Quotation, Delivery Notes and Item Pick up Notes.

Pre-requisites

Following points must be followed before starting the Plugin installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Clever All In One Report Templates.
- An e-commerce module should be present in your instance to use this app.

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 Odoo Config 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

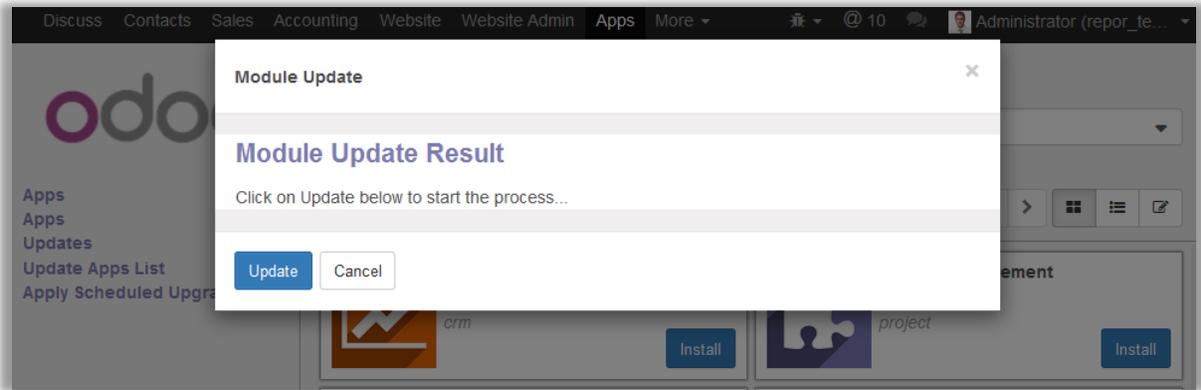
- Give the below mentioned commands to perform copy operation:
 - `$cd /home/odoo/Downloads/general_template`
 - `$cd v8`
 - `$sudocp general_template/opt/odoo/addons`

Step 5: Restart Odoo server

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

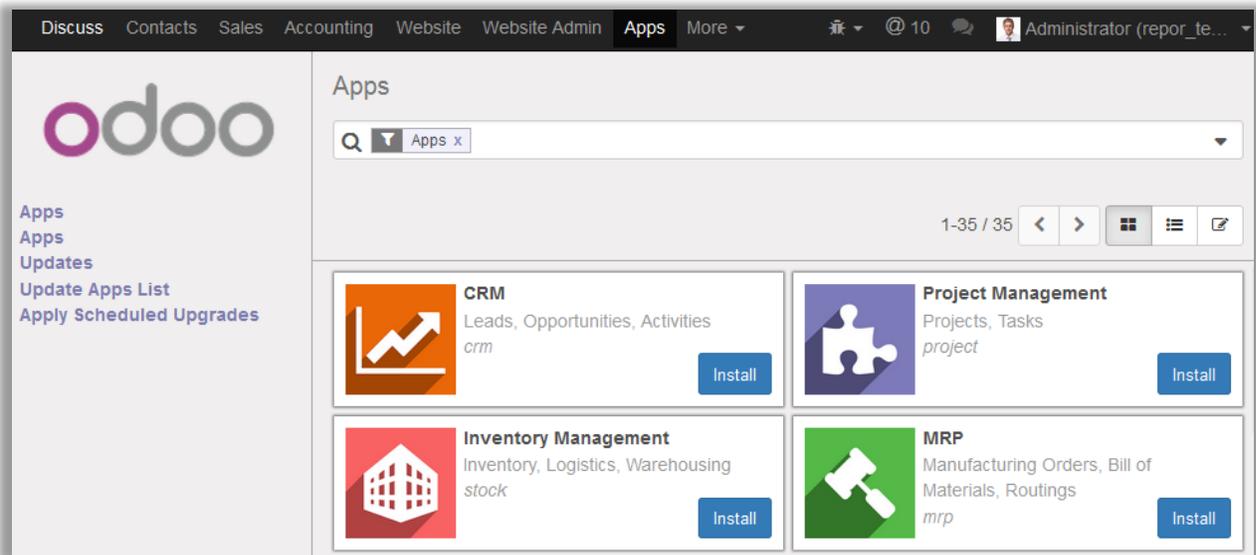
Step 7: Go to Apps/Update Apps List.

- Click on 'Update' button.



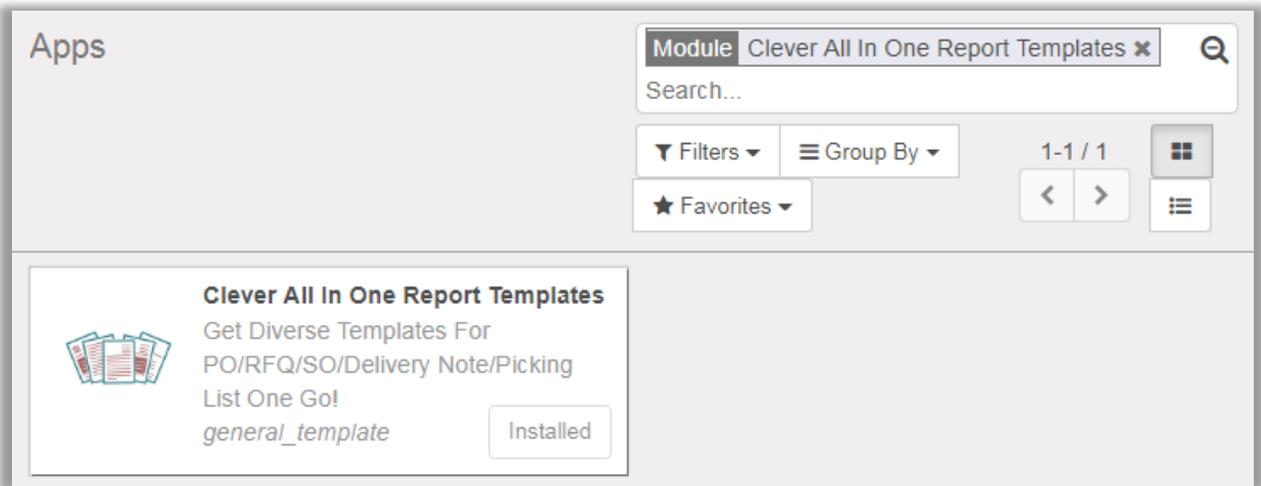
Step 8: Go to Apps

- Remove search filter.



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- Enter module name in the search box provided in the top right corner of the page. For e.g. here write “Clever All In One Report Templates”.
- Click on ‘Install’ button.



App Configuration

Configuring Report Templates

- Go to **Settings** -> **Companies**.
- Select your company and click on **'Report Configurations'**. Now click on **'Edit'** to edit the template.

Set the Custom Footer

- To set custom footer enable **'Custom Footer'** option.
- Add the required Footer in **'Report Footer'** text field.
- Select the format of paper as required from **'Paper Format'** dropdown list.

The screenshot shows a configuration window titled "Configuration". It has three main sections:

- Custom Footer:** A checkbox is checked, indicating this option is enabled.
- Report Footer:** A text area containing the text: "Phone: +1 555 123 8069 | Email: info@yourcompany.example.com | Website: http://www.example.com".
- Paper format:** A dropdown menu currently set to "US Letter", with a small icon to its right.

Set Default Template Settings

Default Template Settings

Quotation/Order Template	Advanced	Invoice Template	Elegant
Purchase Order Template	Contemporary	Delivery Note Template	Exclusive
RFQ Template	Creative	Picking List Template	Incredible

- To set the default template for each of the reports, navigate to **'Default Template Settings'** and choose the default template for each of the following:
 - **Quotation/Order Template:** Choose the default template for **'Quotation/Order Report'**.
 - **Purchase Order Template:** Choose the default template for **'Purchase Order Report'**.
 - **RFQ Template:** Choose the default template for **'RFQ Report'**.
 - **Invoice Template:** Choose the default template for **'Invoice Report'**.
 - **Delivery Note Template:** Choose the default template for **'Delivery Note Report'**.
 - **Picking List Template:** Choose the default template for **'Picking List Report'**.

Set Default Report Settings



Default Report Settings

Preview Template

Report Logo

Standard Template Configuration

Template Base Color

Template Text Color

General Text Color

Company Name Color

Company Address Color

Display Company Name in Bold

Display Amount in Word

Report Watermark Logo

Table Odd Parity Color

Table Even Parity Color

Customer Name Color

Customer Address Color

Display Product Description

Display Customer Name in Bold

Display Product Image

- To set the Default Report Settings navigate to ‘**Default Report Settings**’ section manage following options:
 - **Template Preview:** Template preview will be shown on the basis of chosen Standard Template.
 - **Standard Template Configuration:** Choose the default template for all the Reports from following 6 Options:
 - Contemporary
 - Elegant
 - Creative
 - Professional
 - Advanced
 - Exclusive
 - **Report Logo:** Set the Report Logo for the reports.
 - **Template Base Color:** Set the Template Base Color for the reports.
 - **Template Text Color:** Set the Template Text Color for the reports.
 - **General Text Color:** Set the General Text Color for the reports.
 - **Company Address Color:** Set the Company Address Color for the reports.

- **Report Watermark Logo:** Set Watermark for the reports.
- **Table Odd Parity Color:** Set Table Odd Parity Color for the reports.
- **Table Even Parity Color:** Set Table Even Parity Color for the reports.
- **Customer Name Color:** Set the Customer Name Color for the reports.
- **Customer Address Color:** Set the Customer Address Color for the reports.
- **Display Product Description:** Enable 'Display Product Description' to display product description in the reports.
- **Display Customer Name in Bold:** Enable 'Display Customer Name in Bold' for showing name of customer in Bold in the reports.
- **Display Company Name in Bold:** Enable 'Display Company Name in Bold' for showing name of company in Bold in the reports.
- **Display Product Image:** Enable 'Display Product Image' for showing the product images in the reports.
- Admin can choose any color for the editable text fields with the color picker

Default Report Settings

Preview Template

Report Logo

Standard Template Configuration

Contemporary

Template Base Color

#a24689

Template Text Color

#030103

General Text Color

Company Name Color

Company Address Color

Display Company Name in Bold

Display Amount In Word

Report Watermark Logo

appjelly

Table Odd Parity Color

#FFFFFF

Table Even Parity Color

#e6e8ed

Customer Name Color

#000000

Customer Address Color

#000000

R 3 H 300

G 1 S 76

B 3 B 1

030103

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

Setting Different Template for Customer

- 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.
- Click on **'Report Configuration'** and choose the templates for the following reports:
 - Invoices
 - Sales Order
 - Delivery Note
 - Purchase Order
 - RFQ Template
 - Picking List

The screenshot displays the customer profile for ASUSTeK. At the top left is the ASUS logo. The company name 'ASUSTeK' is prominently displayed. On the right, there are summary statistics: 'Not Archived', '1 Vendor Bills.', '2 Purchases', and '2 Analytic Acc...'. Below this, contact information is listed: Address (31 Hong Kong street, Taipei 106, Taiwan), Website (http://www.asustek.com), Phone ((+886) (02) 4162 2023), Mobile, Fax, Email (asusteK@yourcompany.example.com), and Language. Tags include 'Distributor' and 'Office Supplies'. A navigation bar at the bottom of the profile section includes 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', 'Accounting', and 'Report Configuration' (which is highlighted with a dashed border). Below the navigation bar is the 'Default Report Settings' section, which lists templates for various reports: Invoice Template (Contemporary), Purchase Order Template (Professional), Sale Order Template (Creative), RFQ Template (Advanced), Delivery Note Template (Exclusive), and Picking List Template (Elegant).

Setting Currency for the Report

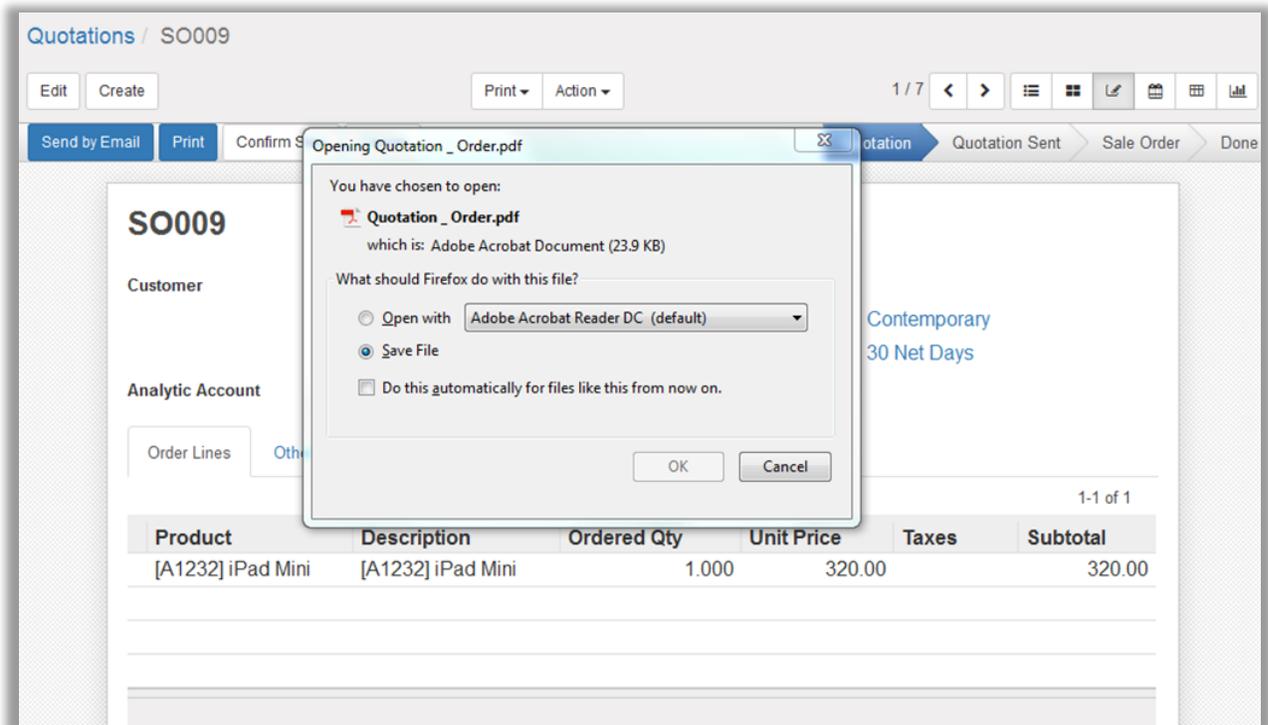
- Go to Sales -> Customers.
- Now select the customer for which you want to set specific currency language and click on 'Edit' to set the currency language from 'Language' dropdown list.

The screenshot shows a customer profile for 'Agrolait'. At the top, there is a logo and the name 'Agrolait'. Below the name, there are radio buttons for 'Individual' and 'Company', with 'Company' selected. To the right, there are three summary boxes: 'Active' (with a blue square icon), '\$1,175.00 Invoiced' (with a pencil icon), and '\$ 2 Sales' (with a dollar sign icon). The main profile area is divided into several sections: 'Address' with fields for '69 rue de Namur', 'Street 2...', 'Wavre', 'State', '1300', and 'Belgium'; 'Phone' with '+32 10 588 558'; 'Mobile' and 'Fax' with empty fields; 'Website' with 'http://www.agrolait.com'; 'Email' with 'agrolait@yourcompany.example.com'; and 'Language' with a dropdown menu showing 'English' selected and a list of other options: 'Arabic / العربية', 'English', 'French / Français', and 'German / Deutsch'. The 'Tags' section shows 'Components Buyer' and 'Partner / IT Services' as active tags, and 'Tags...' as a dropdown.

Printing the Reports

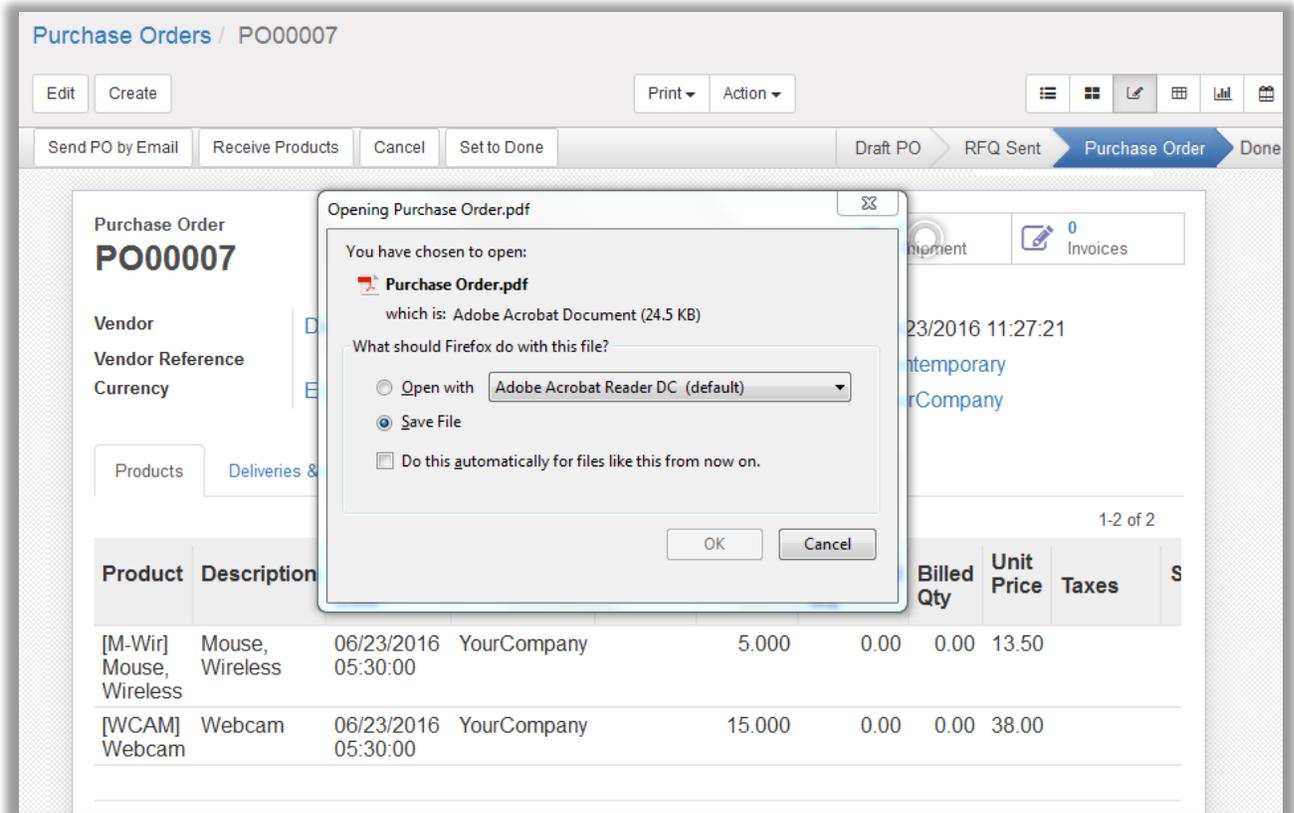
Printing Quotations / Sales Orders

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



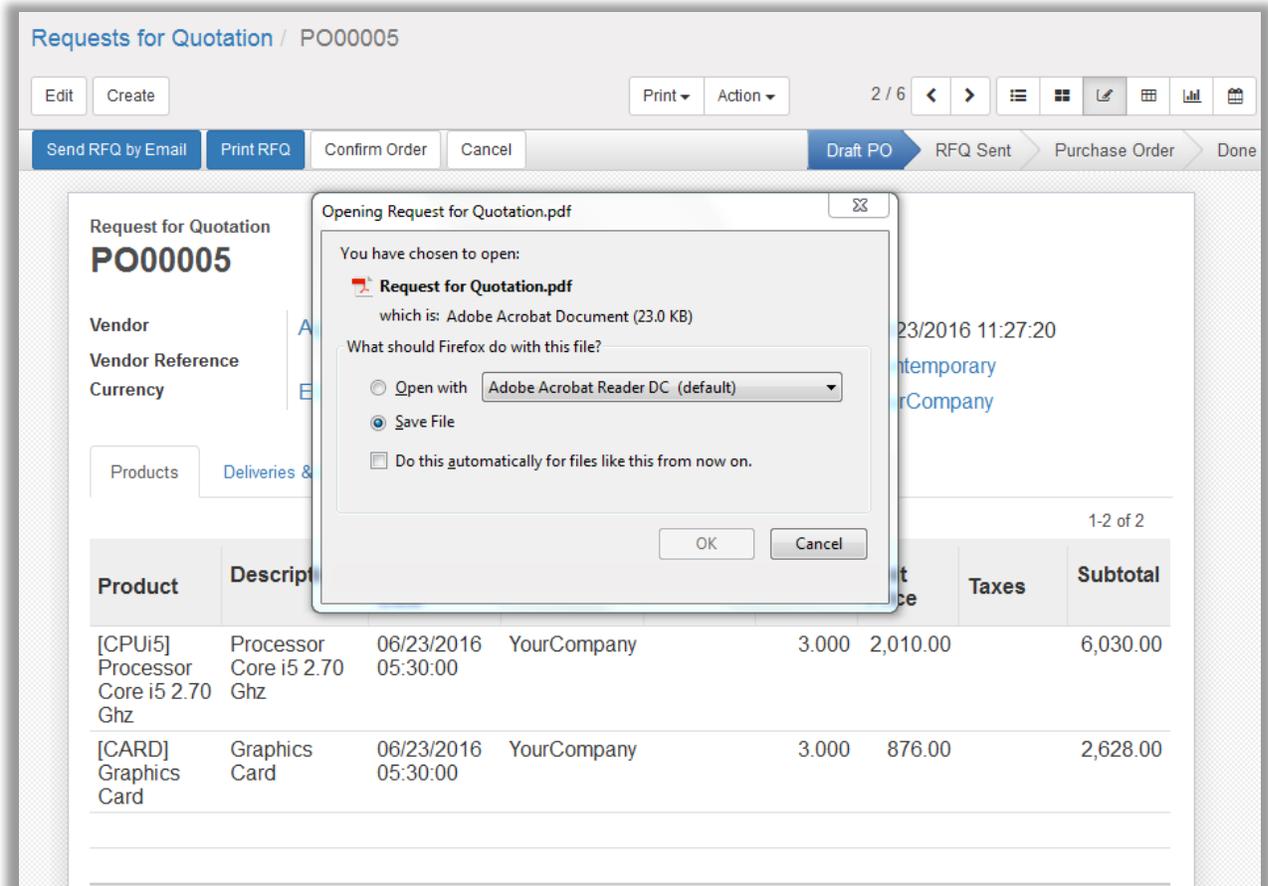
Printing the Purchase Orders

- Go to **Purchases -> Purchase Orders**.
- Select any Purchase Order that is to be printed.
- Click on **Print -> Purchase Order** to print the Purchase Order.



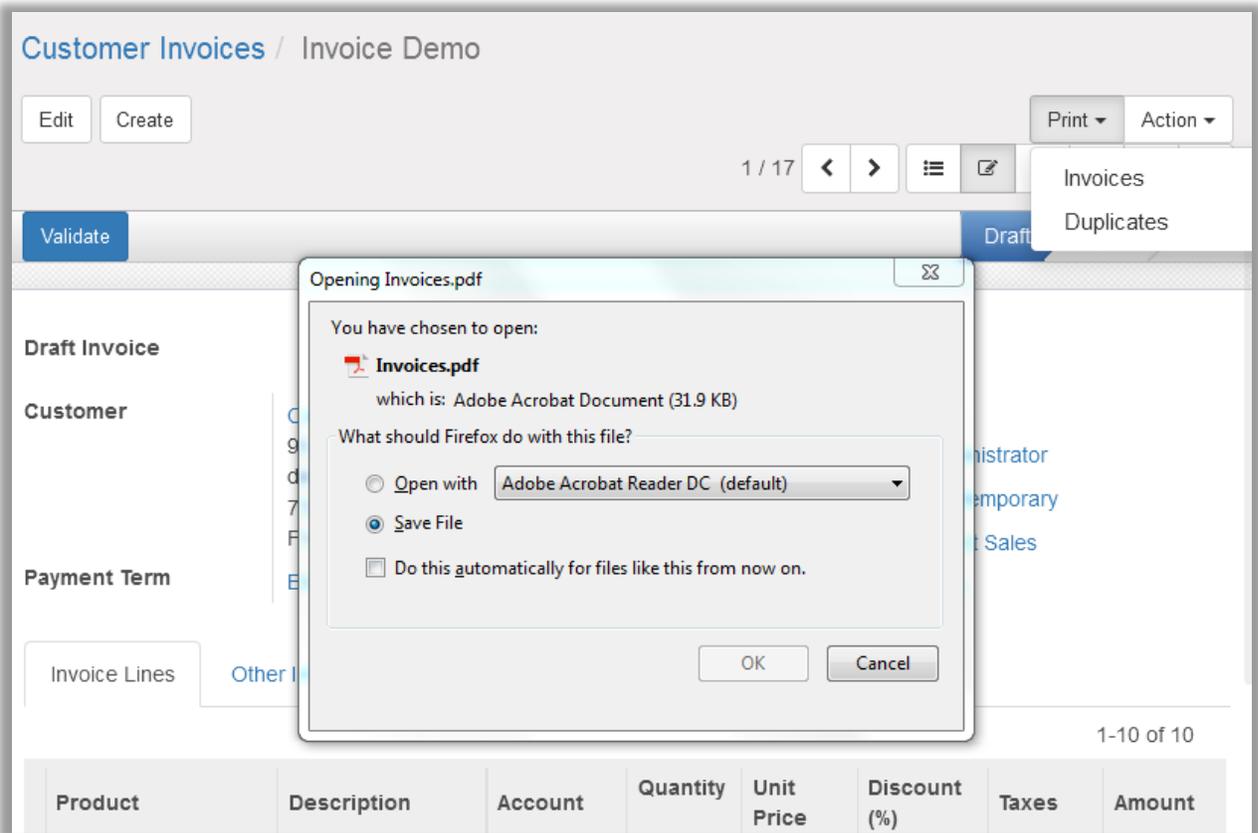
Printing the Request for Quotation

- Go to **Purchases** -> **Request for Quotation**.
- Select any Quotation that you need to print.
- Click on **Print** -> **Request for Quotation** to print the invoice.



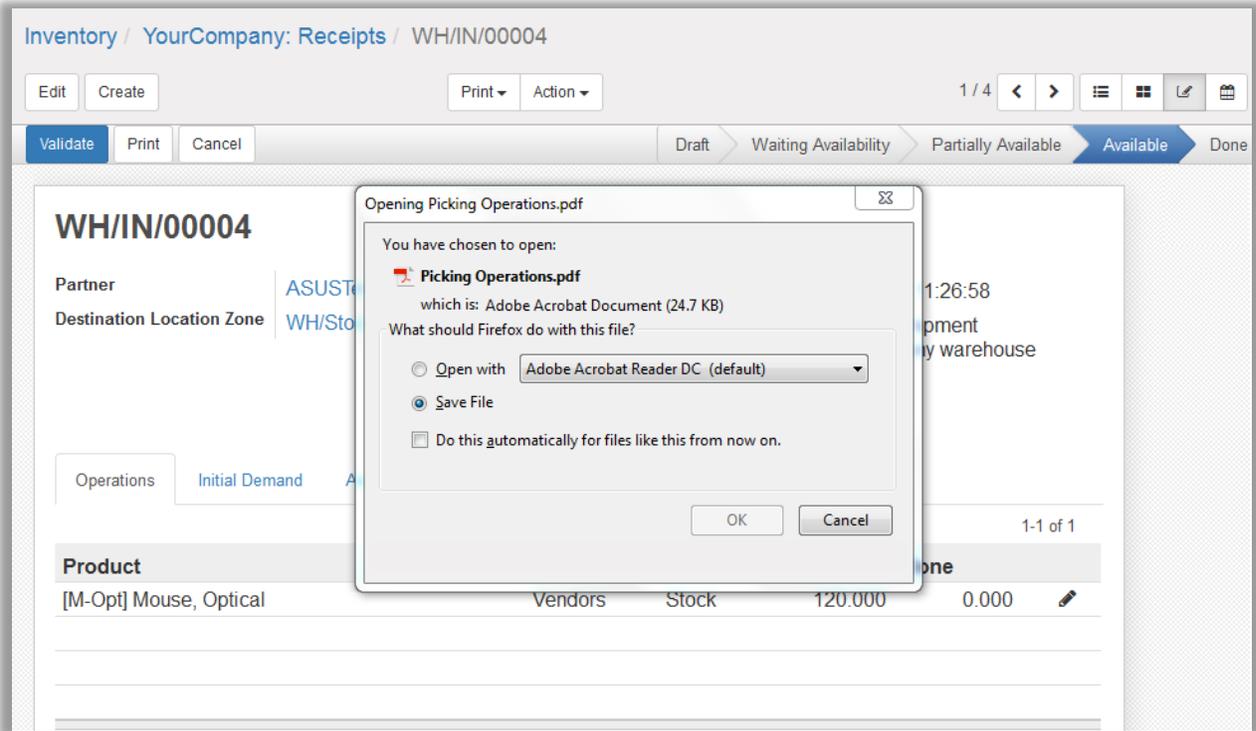
Printing the Invoice

- Go to **Accounting** -> **Customer Invoices**.
- Select any Invoice that you need to print.
- Click on **'Print'** dropdown list and choose **'Duplicates'** option to print the invoice.

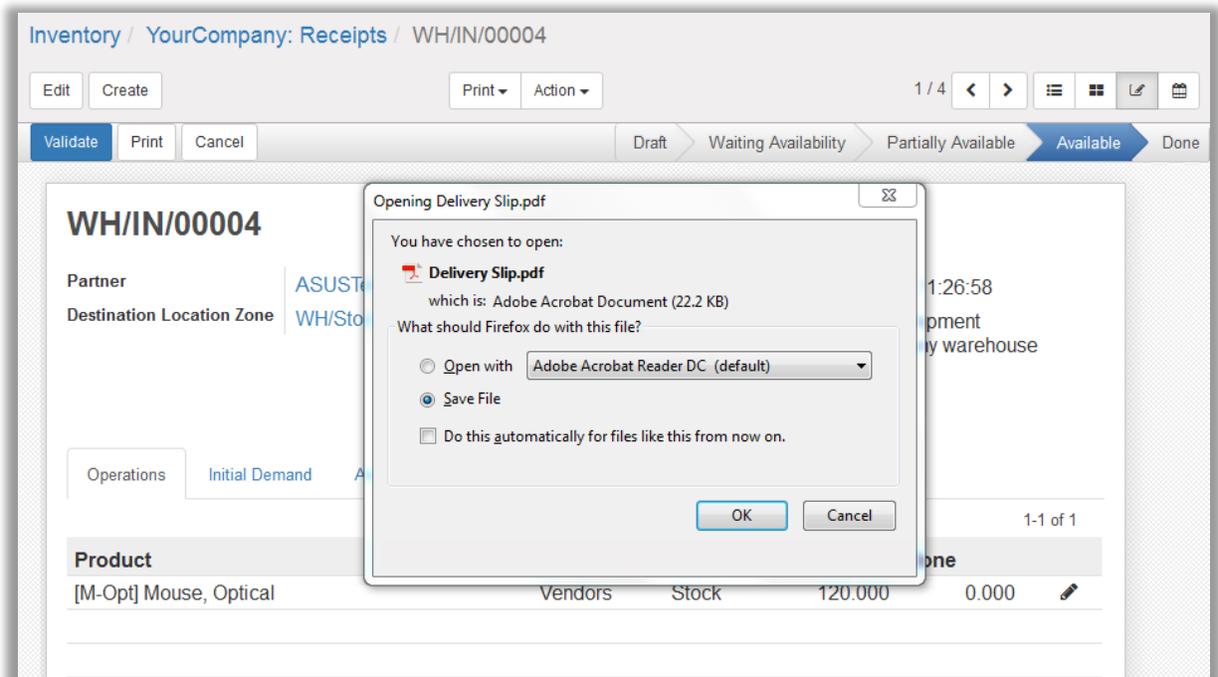


Printing the Delivery Notes / Picking List

- Go to **Inventory -> Receipts / Internal Transfers / Delivery Orders** of any Company.
- Select any order that is to be printed.
- Click on **Print -> Picking Operations** to print Picking List.



- Click on **Print -> Delivery Slip** to print Picking List.



Contact Us

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



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-all-in-one-report-templates.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to my 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 features for **Odoo Clever All in One Report Templates App**, please write to sales@appjetty.com