



Deraya University · Professional  
Training

# Odoo ERP System

4-Day Professional Training Program

**4**

Training Days

**12+**

Modules Covered

**1**

Live Case Study

**∞**

Practical Exercises

**01**

## **Understand ERP Concepts**

Grasp what ERP systems are, why businesses need them, and how they unify operations across departments.

**02**

## **Learn Odoo Modules & Workflows**

Navigate Odoo's interface and master key modules: Accounting, CRM, Sales, Inventory, and Purchasing.

**03**

## **Practice Real Business Scenarios**

Apply knowledge through hands-on exercises simulating end-to-end business transactions.

**04**

## **Configure & Implement Odoo**

Set up a working Odoo environment with proper roles, products, warehouses, and business rules.

# 4-Day Program Overview



## Day 1

ERP Foundations & Odoo Intro

- Business workflow
- What is ERP?
- Odoo Platform Overview

## Day 2

Accounting & Finance

- Chart of Accounts
- Invoices & Bills
- Financial Reports

## Day 3

CRM, Sales & Procurement

- Lead → Opportunity
- Quotations & Orders
- Purchase & Inventory

## Day 4

Case Study & Implementation

- Car Import/Export Co.
- Live Workflow Sim.
- Final Workshop

DAY 1

# ERP Foundations & Odoo Introduction

What is ERP?

Importance of ERP

Odoo Platform Overview

Community vs Enterprise

Applications & Navigation

Project Lifecycle

## What is ERP?

Enterprise Resource Planning (ERP) integrates all core business processes — finance, HR, supply chain, and procurement — into a single unified platform where every department shares the same real-time data.

## Why ERP Matters

- Eliminates data silos between departments
- Real-time visibility across the business
- Reduces manual errors and duplicate entry
- Scales with company growth

## ERP Modules Overview

Finance & Accounting

Sales & CRM

Inventory & Warehouse

Purchasing

Human Resources

Manufacturing

## Odoo Platform Overview

Open-source ERP platform with 80+ modules covering CRM, Sales, Inventory, Accounting, HR, Manufacturing, Website, and more. Used by 12+ million users in 100+ countries.

## Community Edition

- Free & open-source
- Core business modules
- Large community support
- Self-hosted only
- Ideal for SMEs starting out

## Enterprise Edition

- Advanced modules & features
- Official Odoo support
- Cloud (SaaS) or self-hosted
- Studio customization tool
- Recommended for businesses

## Requirement Gathering

## Gap Analysis

## System Configuration

## Testing & Deployment

## Training & Support

1

Understand current processes, pain points, and goals. Interview stakeholders across all departments.

2

Compare current state vs. Odoo capabilities. Identify what needs configuration or customization.

3

Set up chart of accounts, products, warehouses, users, roles, and workflows in Odoo.

4

Run UAT (User Acceptance Testing), fix issues, migrate data, then go live.

5

Train end-users by role, provide go-live support, and monitor adoption.

DAY 2

# Accounting & Financial Workflows

Accounting Module Overview

Journals & Journal Entries

Financial Operations

Chart of Accounts

Fiscal Periods

Financial Reporting

## Chart of Accounts

- Structured list of all financial accounts
- Assets, Liabilities, Equity, Income, Expenses
- Auto-configured per country/industry

## Journals & Entries

- Sales journal, Purchase journal, Bank journal
- Manual journal entries for adjustments
- Every transaction creates a journal entry

## Customer Invoices

- Auto-generated from confirmed sales orders
- Send via email directly from Odoo
- Track payment status in real time

## Vendor Bills

- Record supplier invoices against POs
- Three-way matching: PO → Receipt → Bill
- Schedule payments and set due date alerts

## Payments & Reconciliation

- Register payments in one click
- Auto-reconcile bank statements via sync
- Outstanding balances tracked automatically

## Financial Reports

- Profit & Loss | Balance Sheet
- General Ledger | Trial Balance
- Aged Receivables & Payables

DAY 3

# CRM, Sales & Procurement

Lead Management

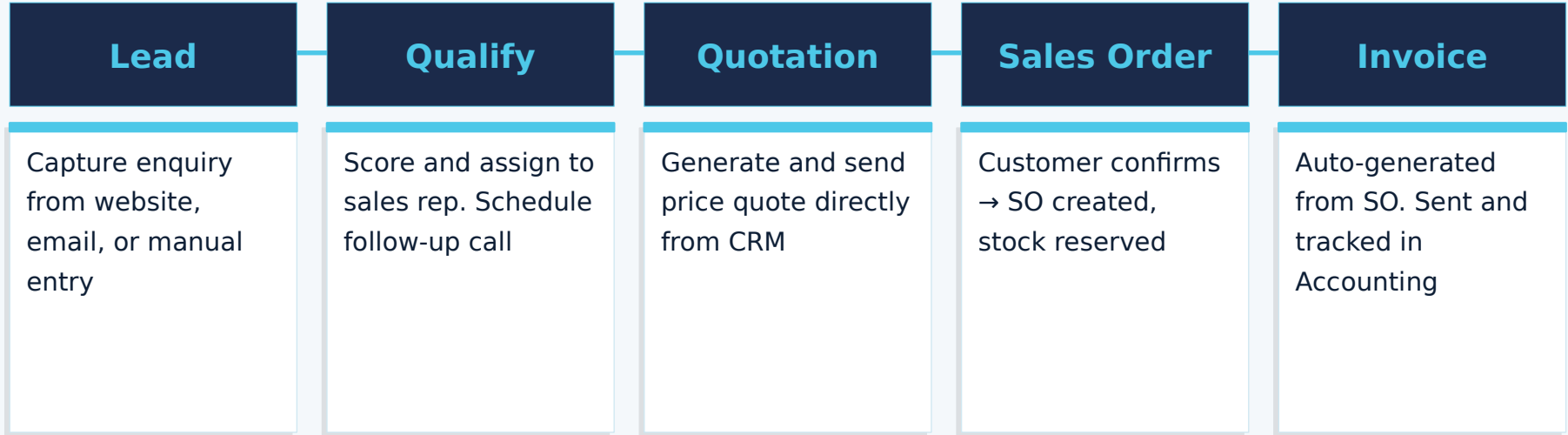
Quotations & Sales Orders

Request for Quotation (RFQ)

Opportunity Pipeline

Vendor Management

Inventory Tracking



## Purchase & Inventory

- Vendor Management — maintain supplier records, payment terms, and pricing lists
- Goods Receipt — validate delivery against PO; inventory updates automatically
- RFQ → Purchase Order — send requests for quotation, compare prices, confirm PO
- Inventory Tracking — real-time stock levels, reorder rules, multi-warehouse support

DAY 4

# Case Study & Implementation

Car Import & Export Company

Product & Warehouse Setup

Business Workflow Simulation

System Configuration

User Roles & Permissions

Final Workshop



A car import & export company will be configured in Odoo from scratch — covering all departments end to end.

## System Configuration

- Company settings, fiscal year, currency
- Chart of accounts for auto trade
- Tax configuration and payment terms

## Product Setup for Vehicles

- Product category: Vehicles
- Each car as a tracked serial product
- Cost, sale price, and supplier info

## Warehouse Setup

- Import warehouse (receiving bay)
- Export warehouse (delivery dock)
- Transfer routes between locations

## User Roles & Permissions

- Sales Manager / Sales Rep
- Warehouse Operator
- Accountant / Finance Manager

## Purchase

01

### Purchase Vehicles from Supplier

Create RFQ →  
Confirm PO → Send to supplier

## Inventory

02

### Receive Inventory

Validate delivery order → Stock updated → Serial numbers logged

## Sales

03

### Create Sales Order

Customer selects vehicle → Quotation sent → SO confirmed

## Inventory

04

### Deliver Vehicles

Pick & pack → Delivery validated → Customer signs off

## Accounting

05

### Generate Invoices

Invoice auto-created from SO → Sent to customer → Payment registered

FINAL WORKSHOP

# Complete Implementation Exercise & Q&A

Full system implementation exercise

Role-based hands-on tasks

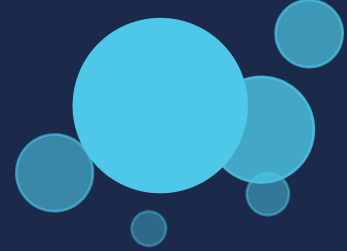
Open Q&A session

Best practices for ERP rollout

Go-live checklist review

Certificate of Completion





# Thank You!

Ready to transform your business with Odoo?

- Website: [www.etruplesoft.com](http://www.etruplesoft.com)
- Program: 4-Day Odoo ERP Training — Deraya University
- Powered by: ETripleSoft × Deraya University