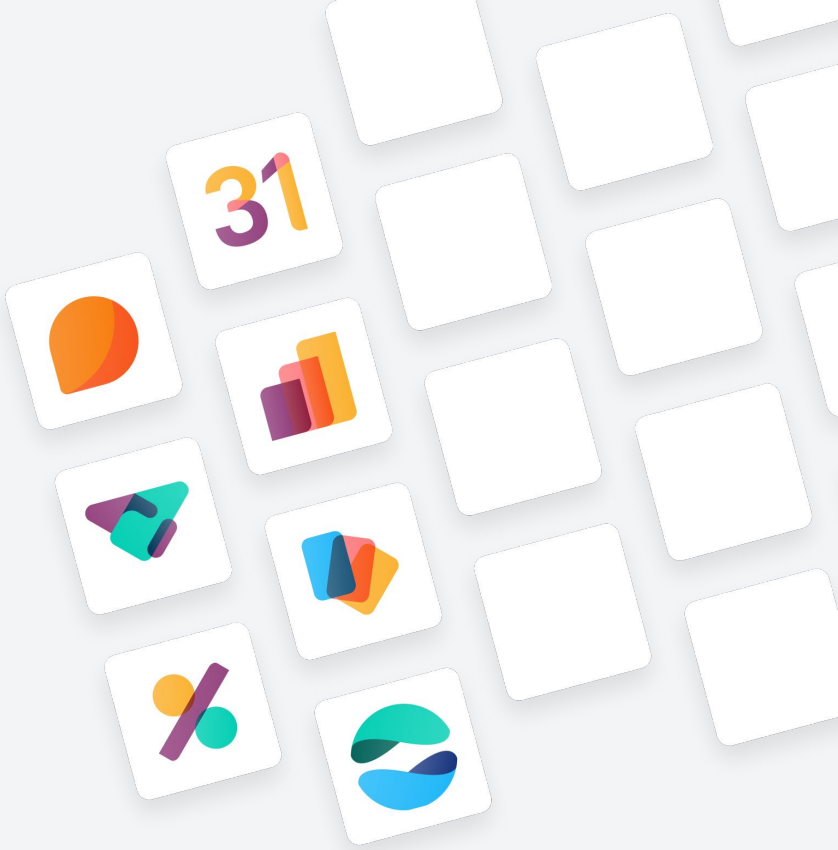


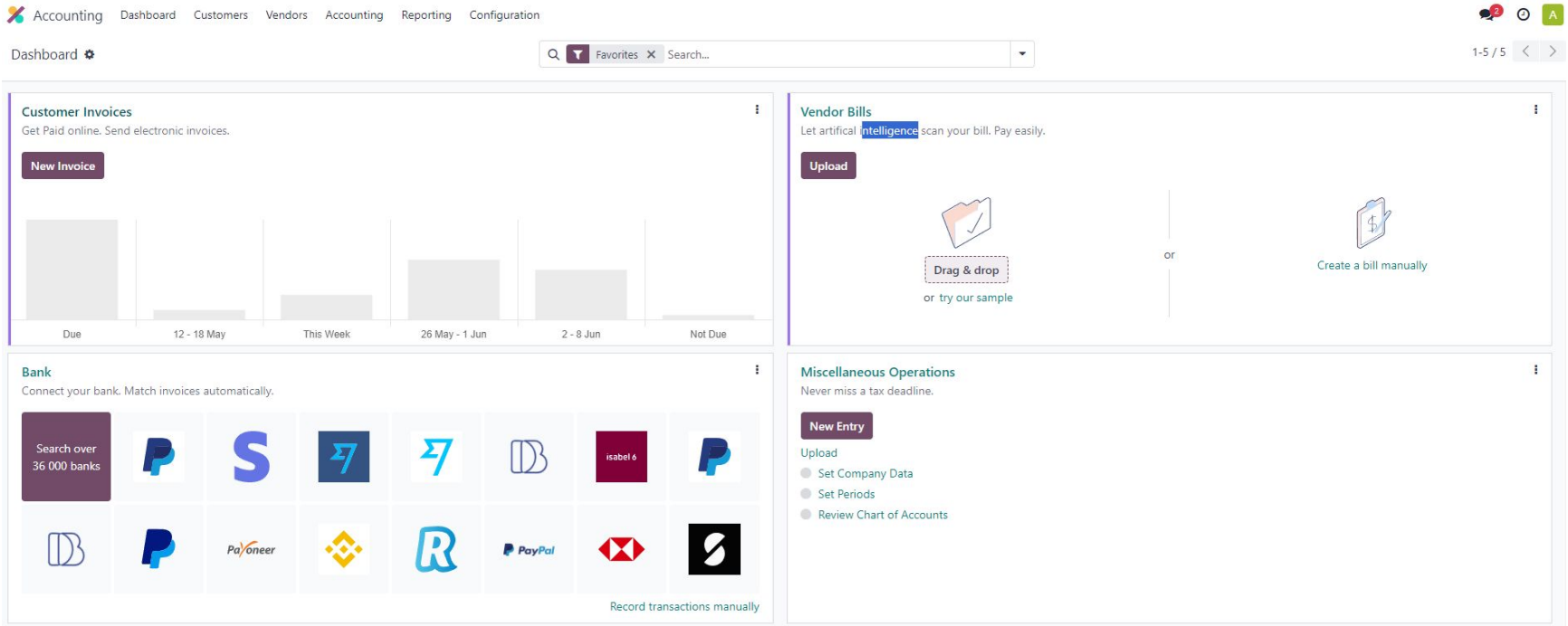
Odoo 18
R&D Sneak Peek

Christophe Klopfert, Product Owner

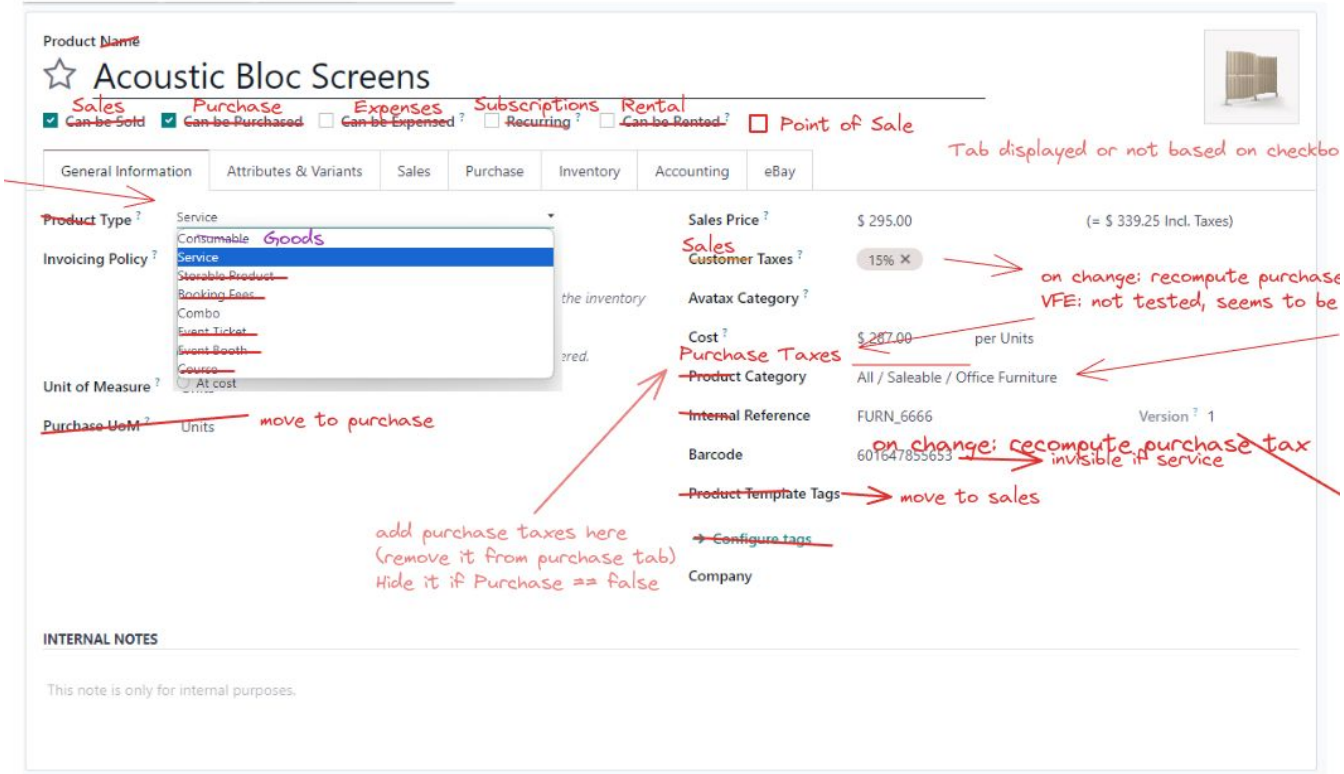
Our priorities

1. Onboarding of new users
2. Discovery (of existing functionalities)
3. Setting up (configuration & imports)
4. New features for existing users

Onboarding & Discovery : Accounting



Setting up example: the Product form



Sales & Cie

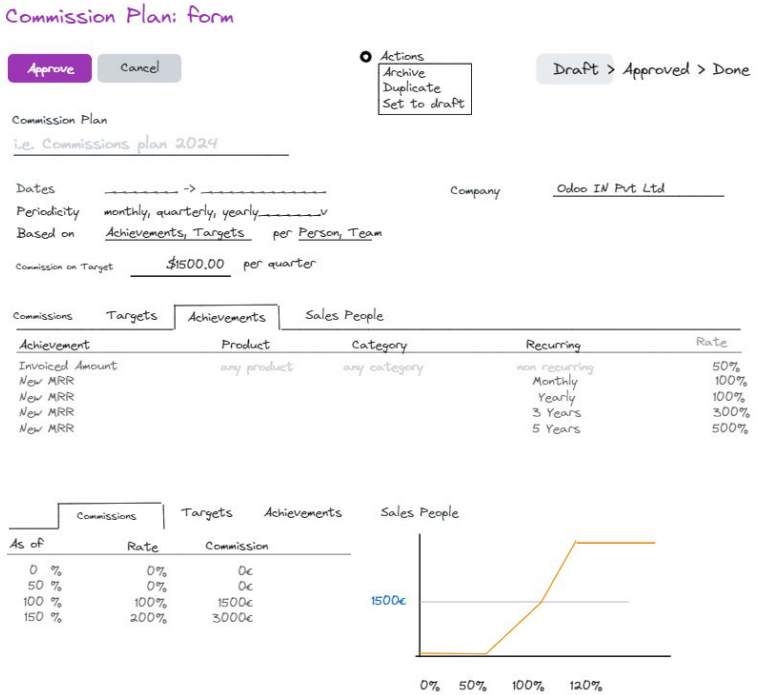
Sales Commissions

New module to compute the commissions of Sales persons

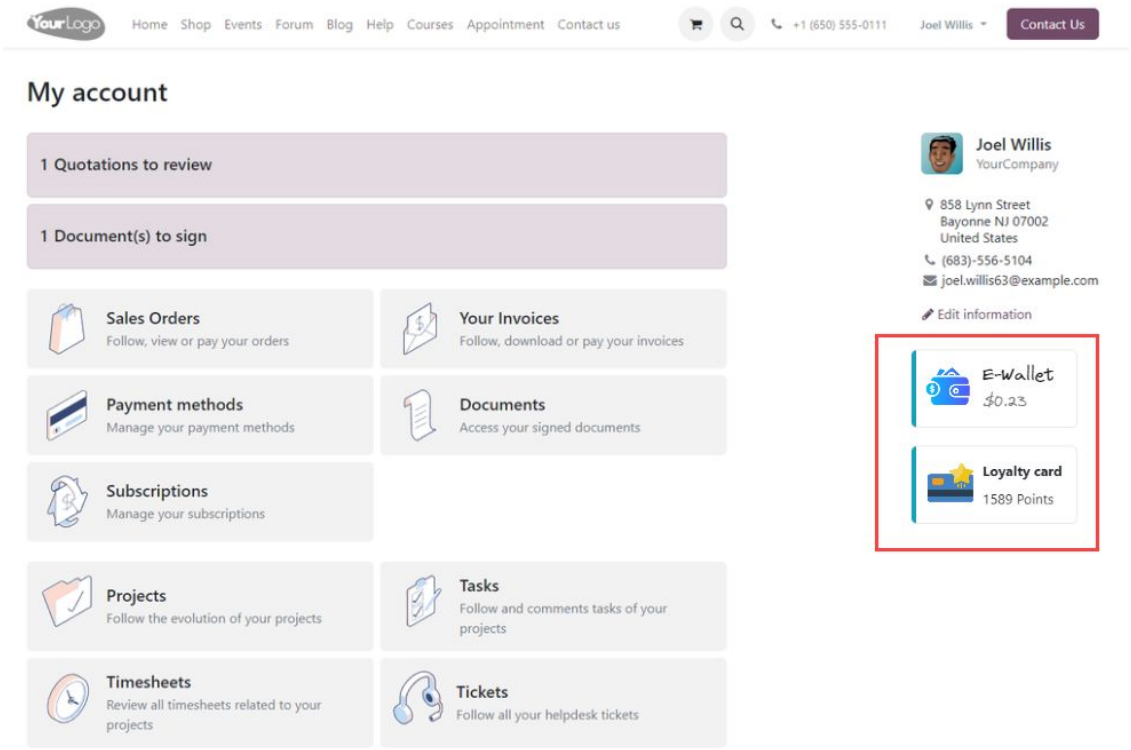
Achievements and Targets can be based on:

- 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.

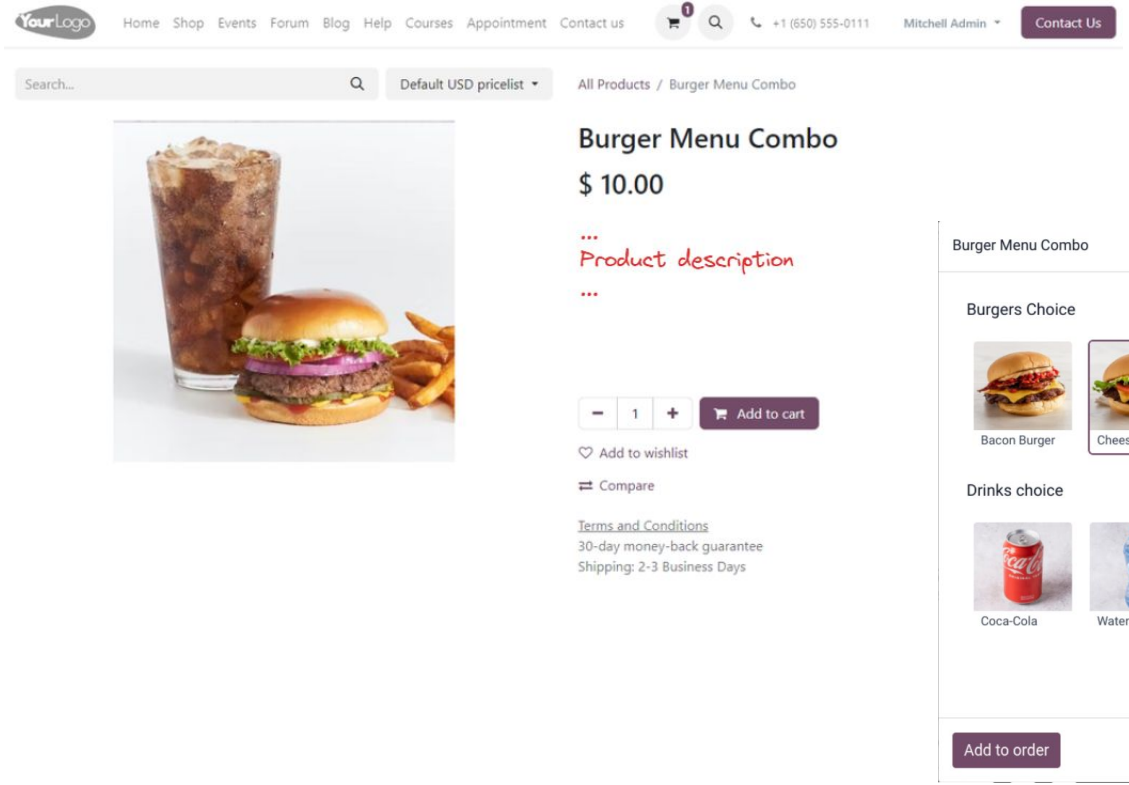


Loyalty in Portal



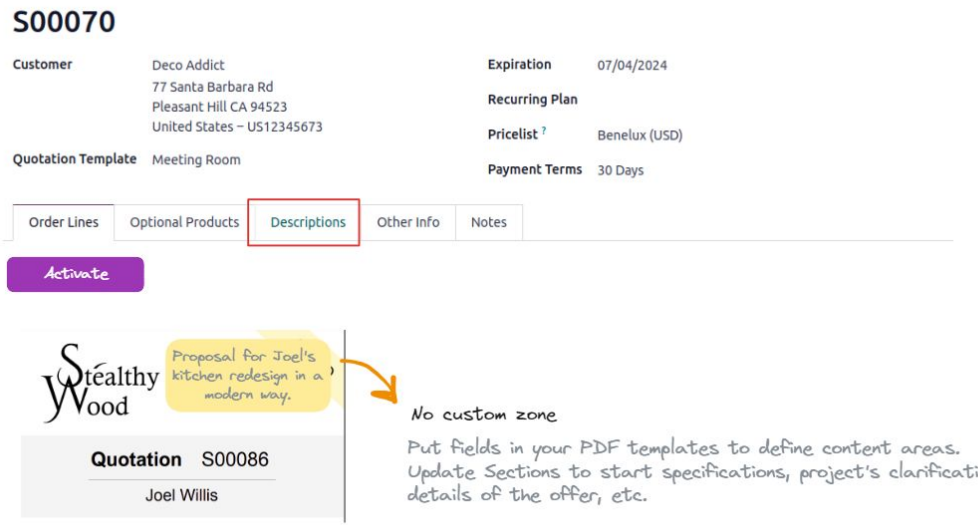
Combo products “everywhere”

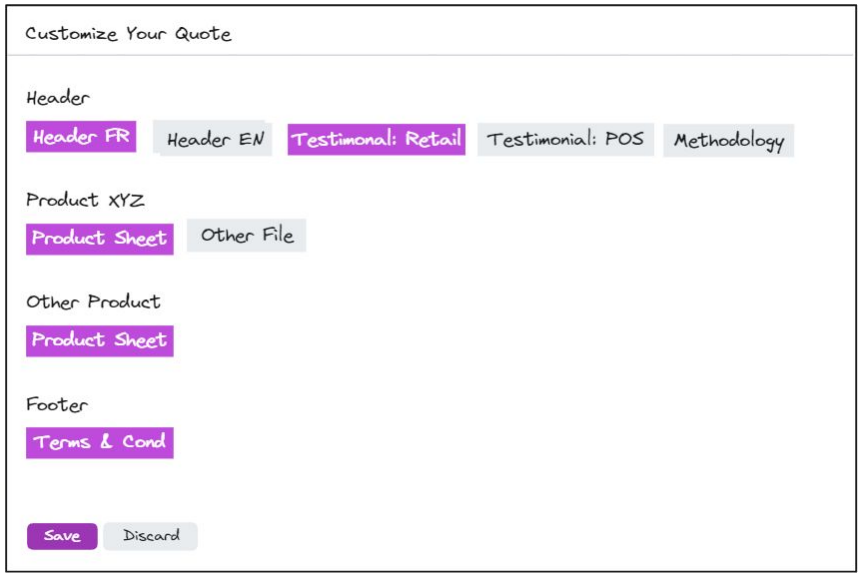
PoS + Sales, Ecommerce, Rental, Subscriptions



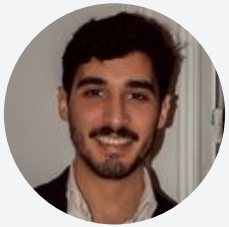
PDF Quote builder 2.0

- Translations
- Use any fields (based on a whitelist)
- Insert custom zones that can be manually modified for each quotation.

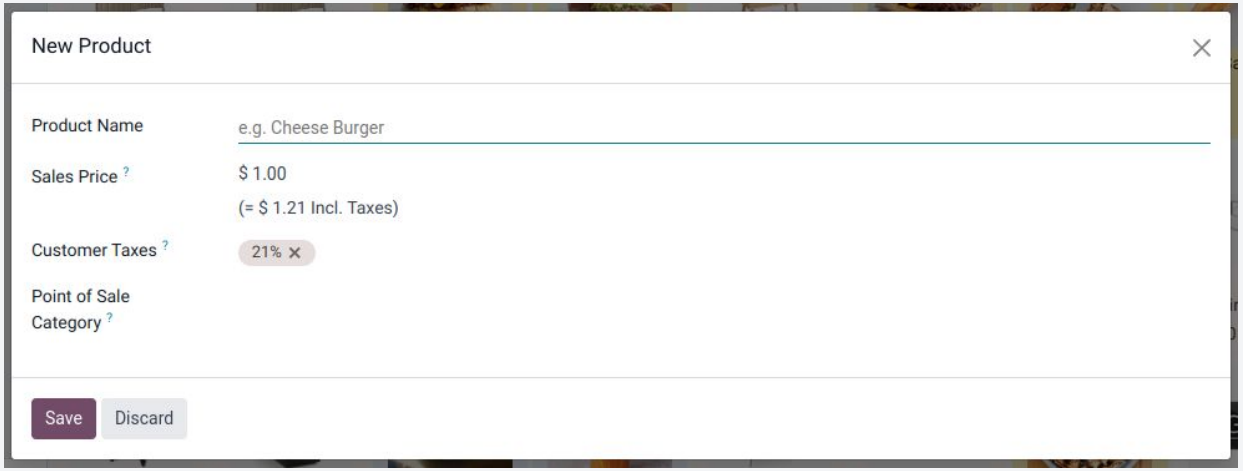




Point of Sale



Backend views directly to frontend



Create products without leaving PoS interface

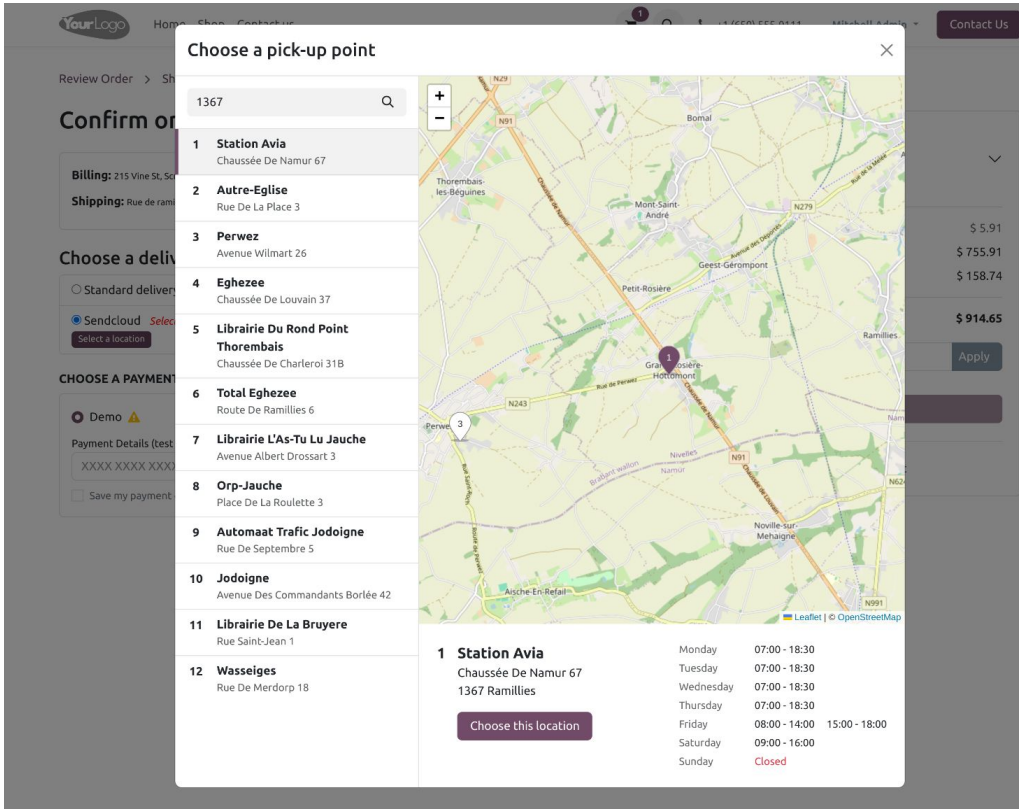
And barcode lookup !

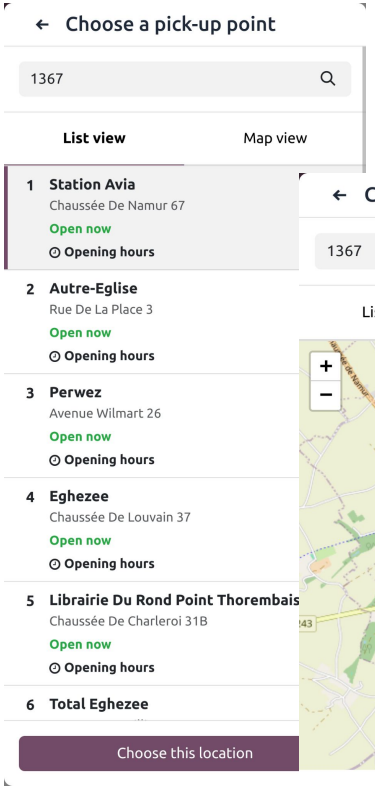
But also...

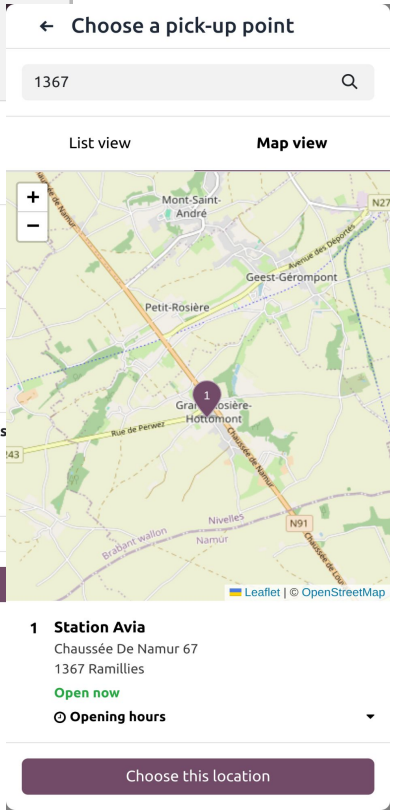
- Free orders in PoS restaurant
- PoS events
- Product with variants displayed like in e-commerce
- New designs for better UX at login and payment screen

eCommerce

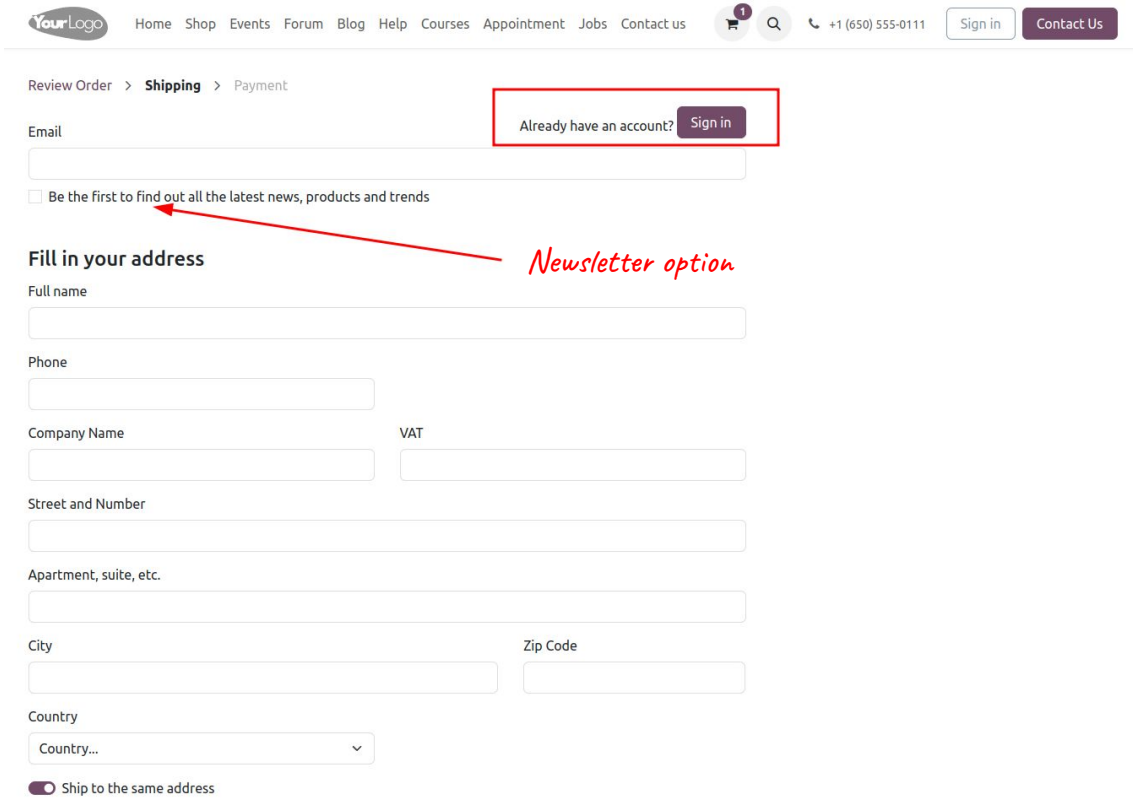
New location selector widget







Sign in button in checkout form



... And more

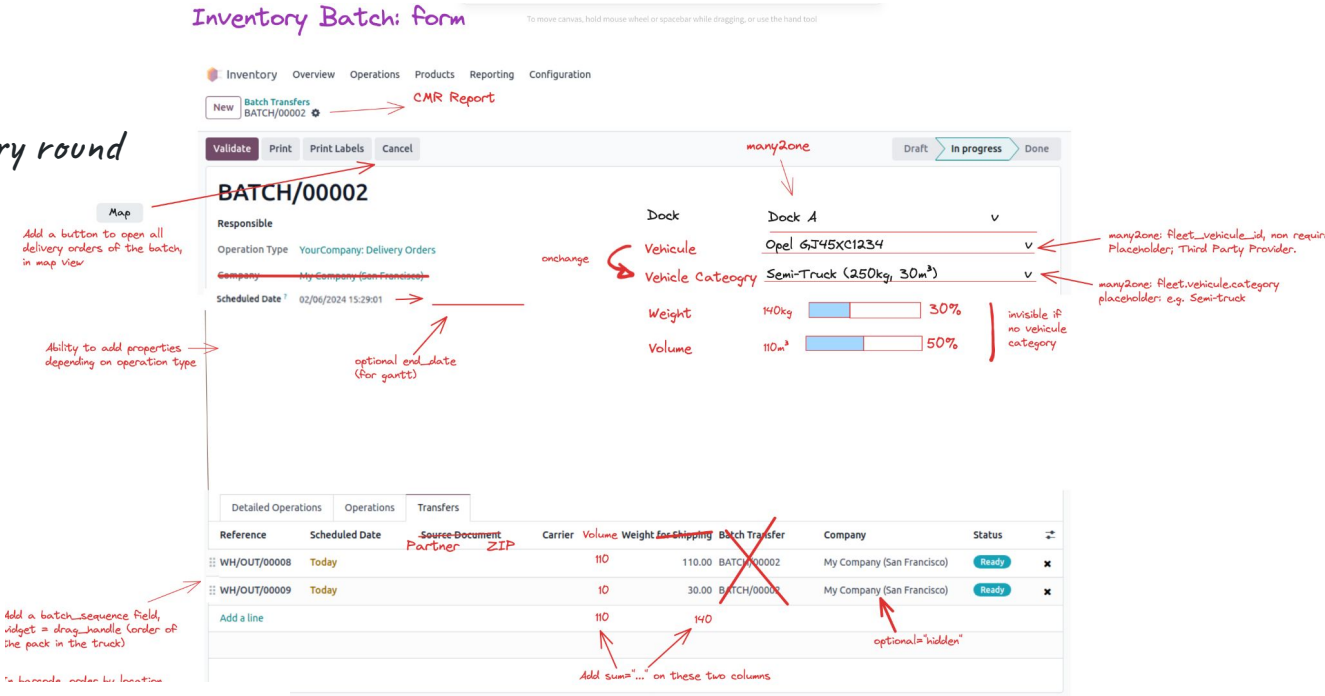
- **One page checkout**
- **Hide /shop page** for unknown customers
- **/shop and product pages** redesign
- Various **SEO** improvements
- Generate a **mega menu** based on ecommerce categories
- Allow **multiple warehouses** on a website and **display stock** quantity on the product page
- Improved **Click&Collect** flow
- **Order confirmation** before payment

Inventory / Purchase

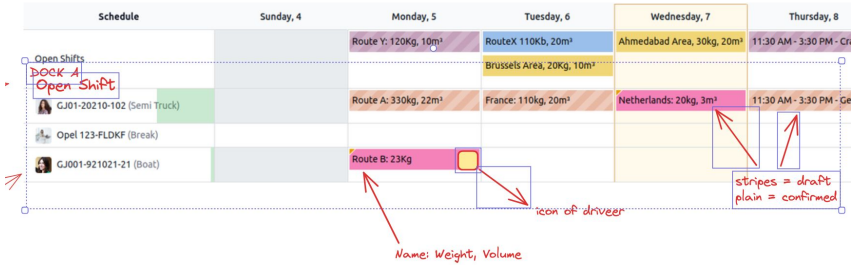
Delivery dispatching

- order pickings in batch for delivery round
- assign vehicle to batch
- Map view of the batch

Inventory Batch: form

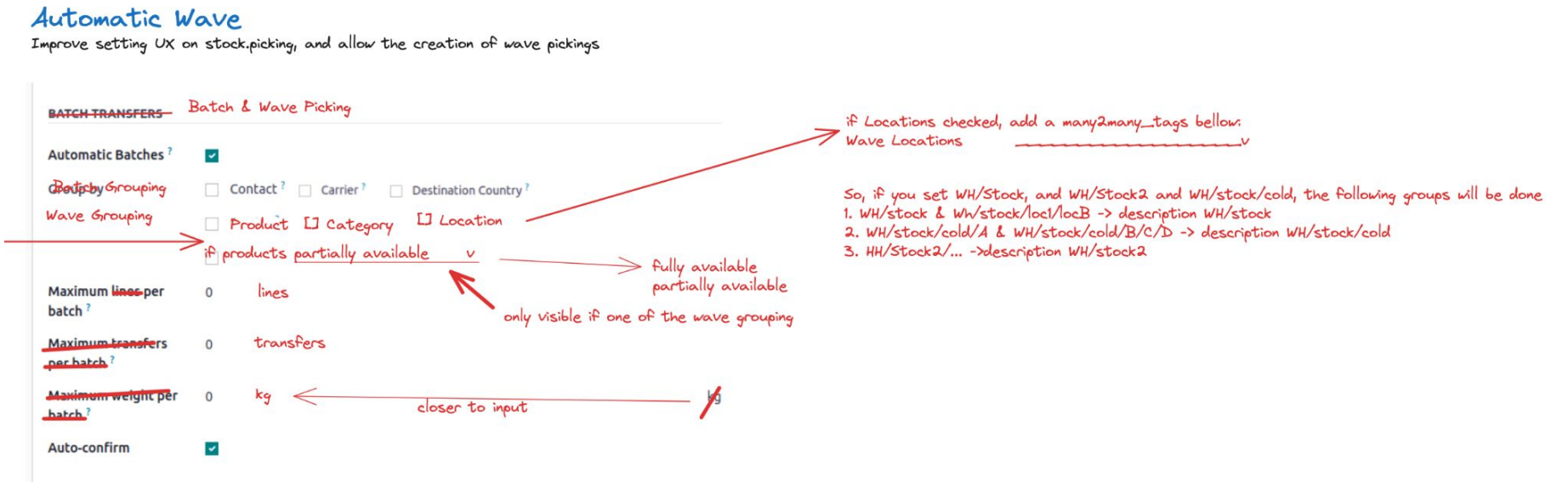


Inventory Batch: Gantt



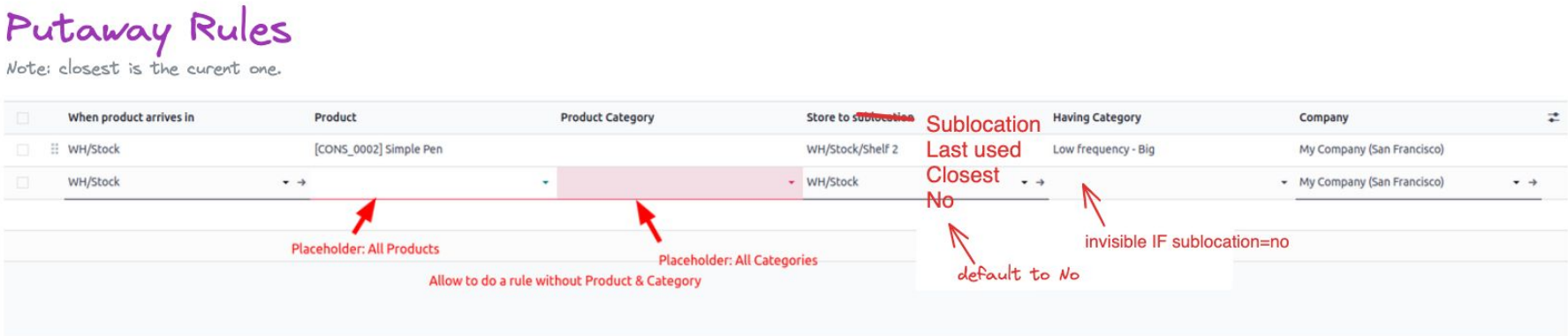
Improved automated batches

- Allows to combine waves and batches

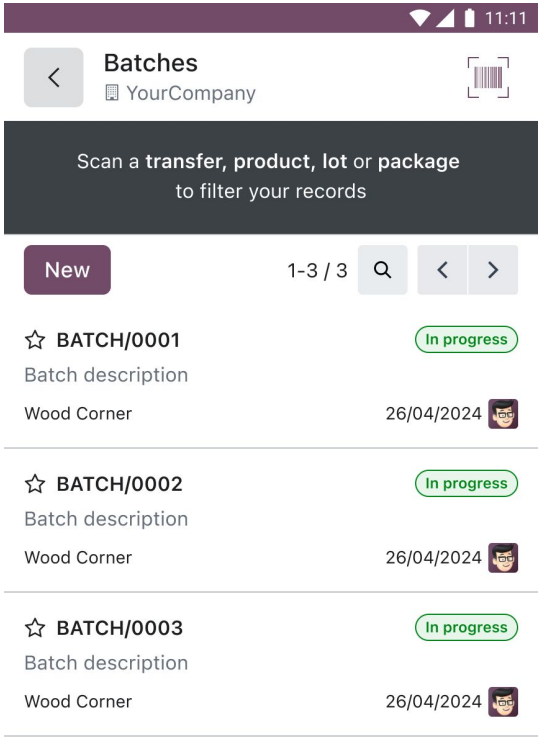


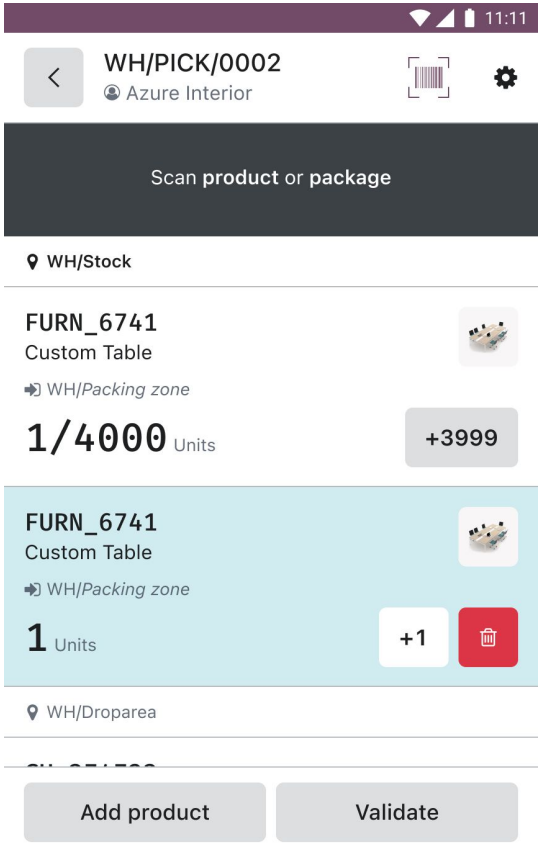
Better putaways

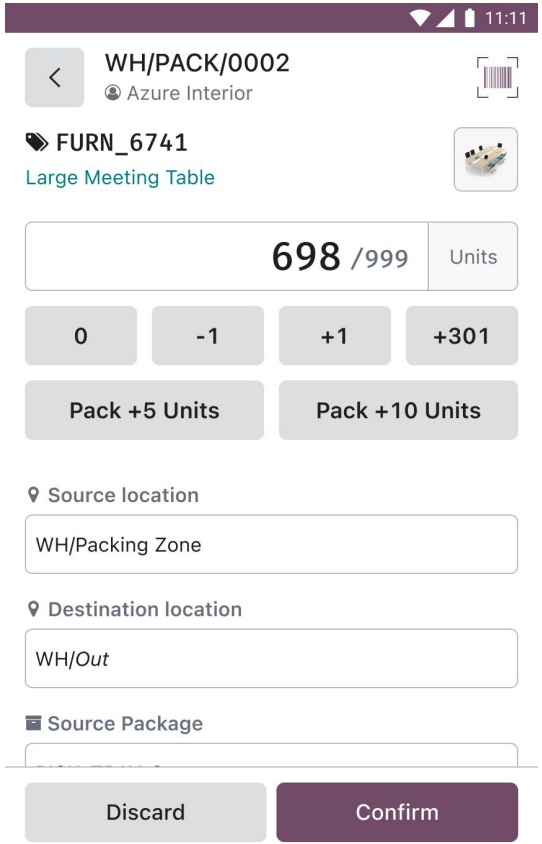
- Can send products where they already are/were



Revamped barcode app







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

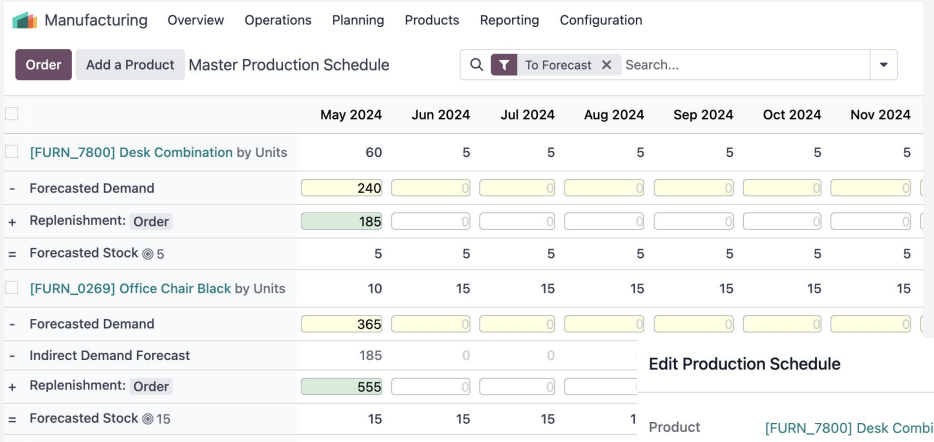
- Down payments
- Purchase templates
- Structured data(UBL) stored in the pdf RfQ/PO for easy import in sales
- Merge RfQs manually
- Improved reports

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

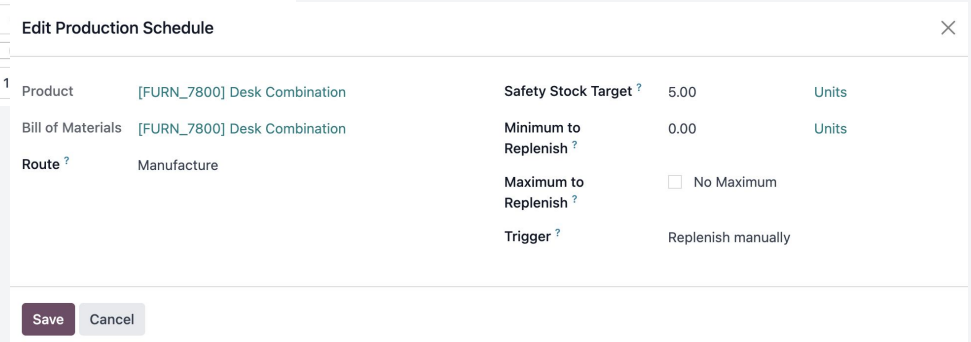
MRP

MPS Updates

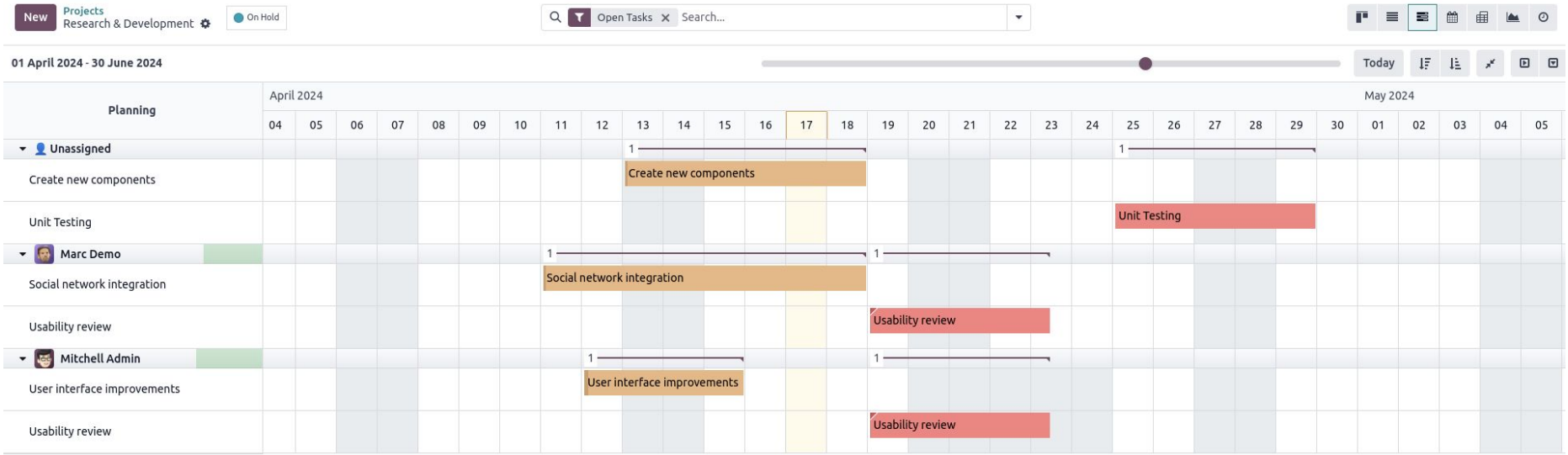


UI Revamp

Automatic Replenishment + Flexible Route

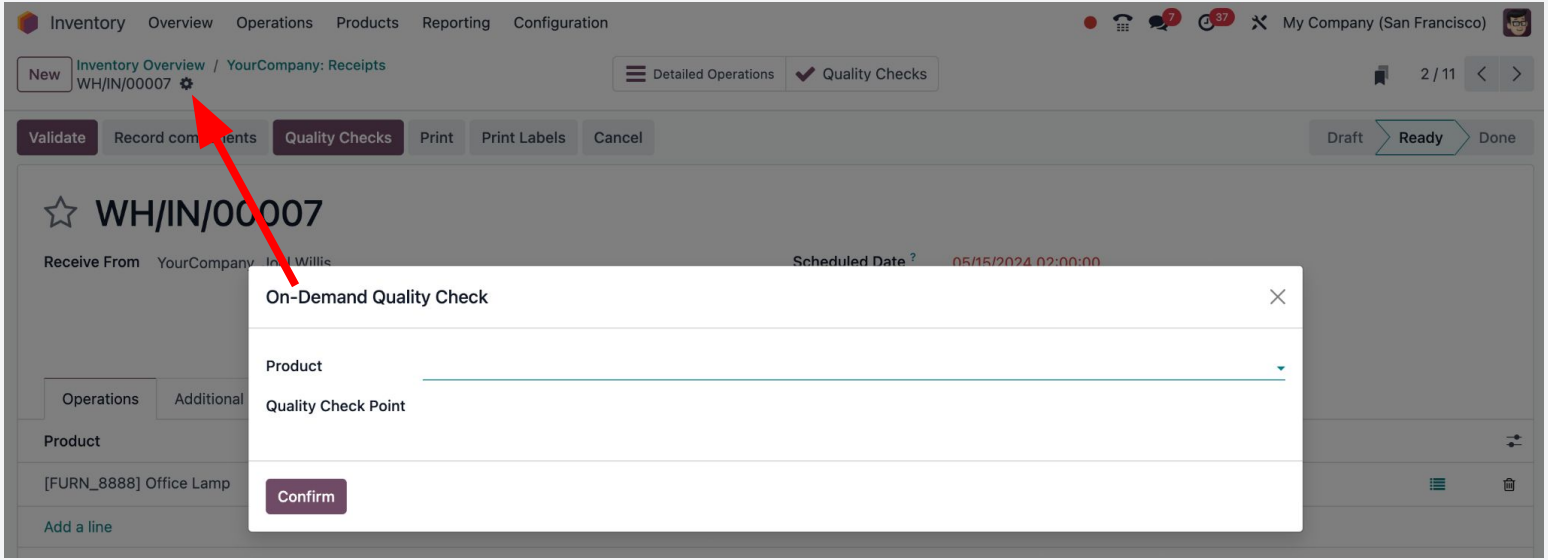


Gantt view improvements

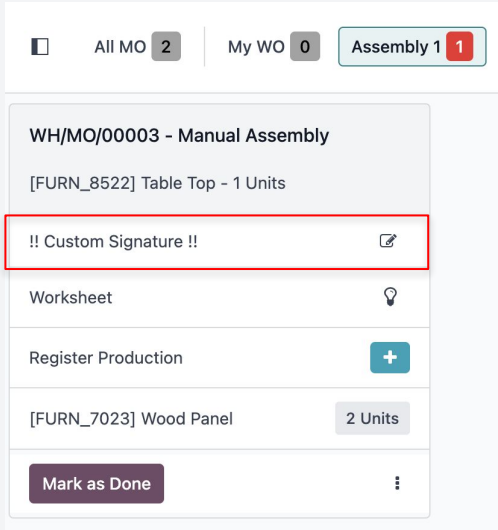


zoom in/out, scroll horizontally, view one task per line and much more!

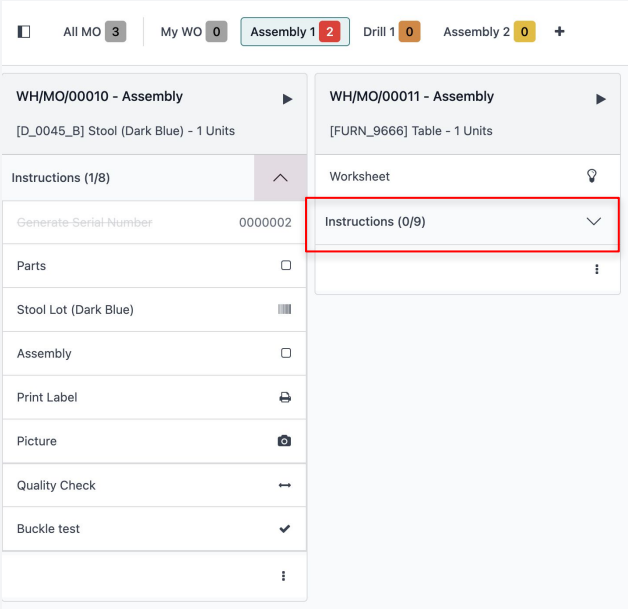
On-Demand Quality Checks



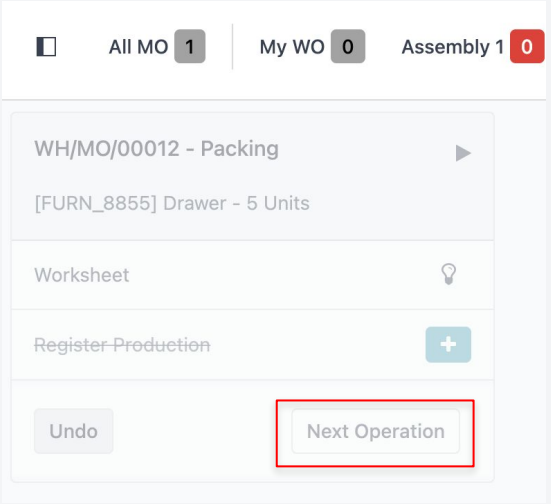
Shop Floor Improvements



Add Notes

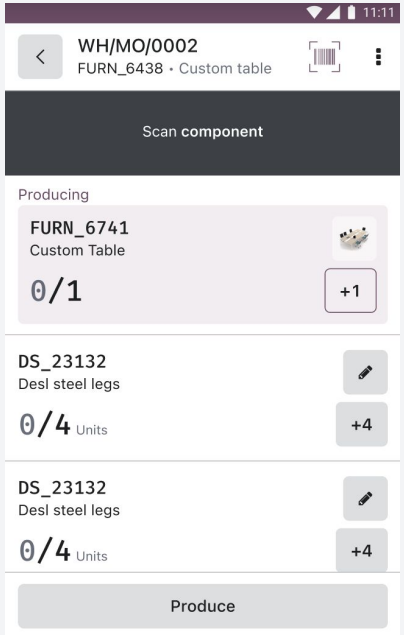


Fold/Unfold Instructions



Next Operations

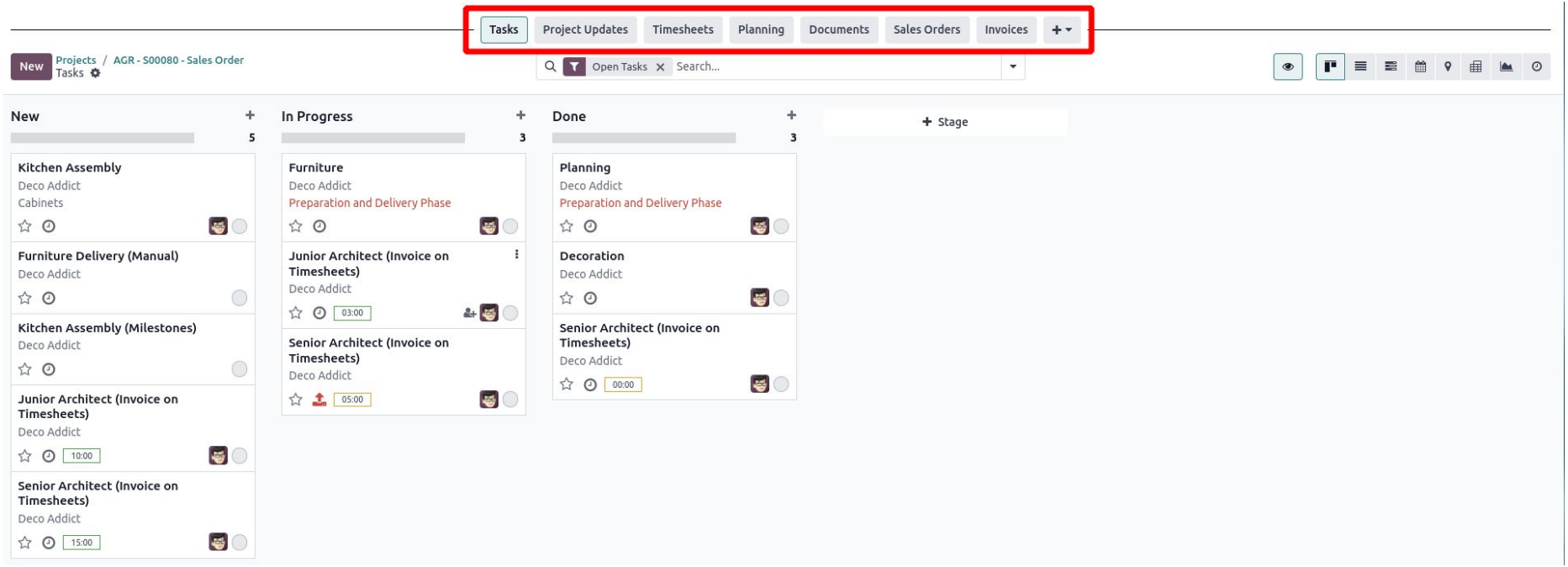
And more...



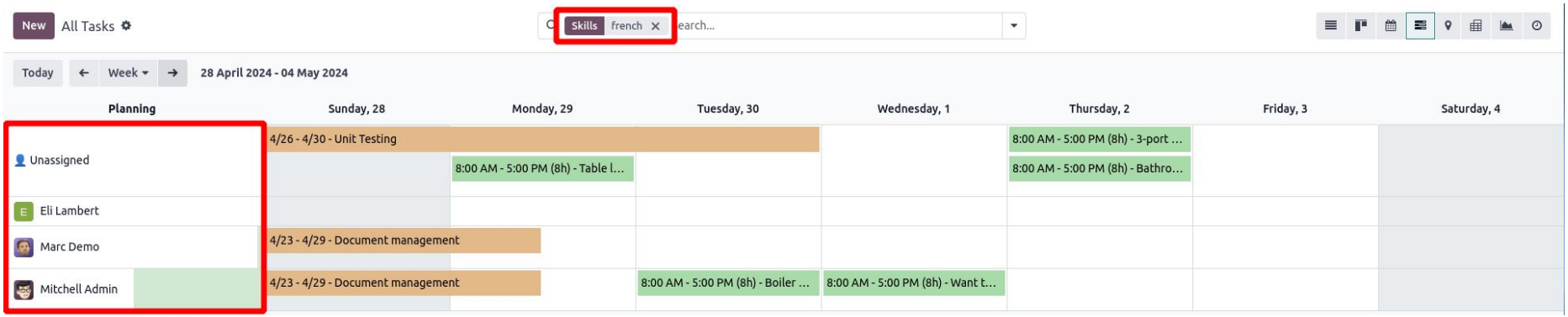
- Project & MO Link
- Quality and multi step for Repair Orders
- Repair for Rental Returns
- MRP Documents Refactor
- Product Catalog for BOM, MO, Repair
- Mass Produce Redesign
- Work in Progress Management...

Services

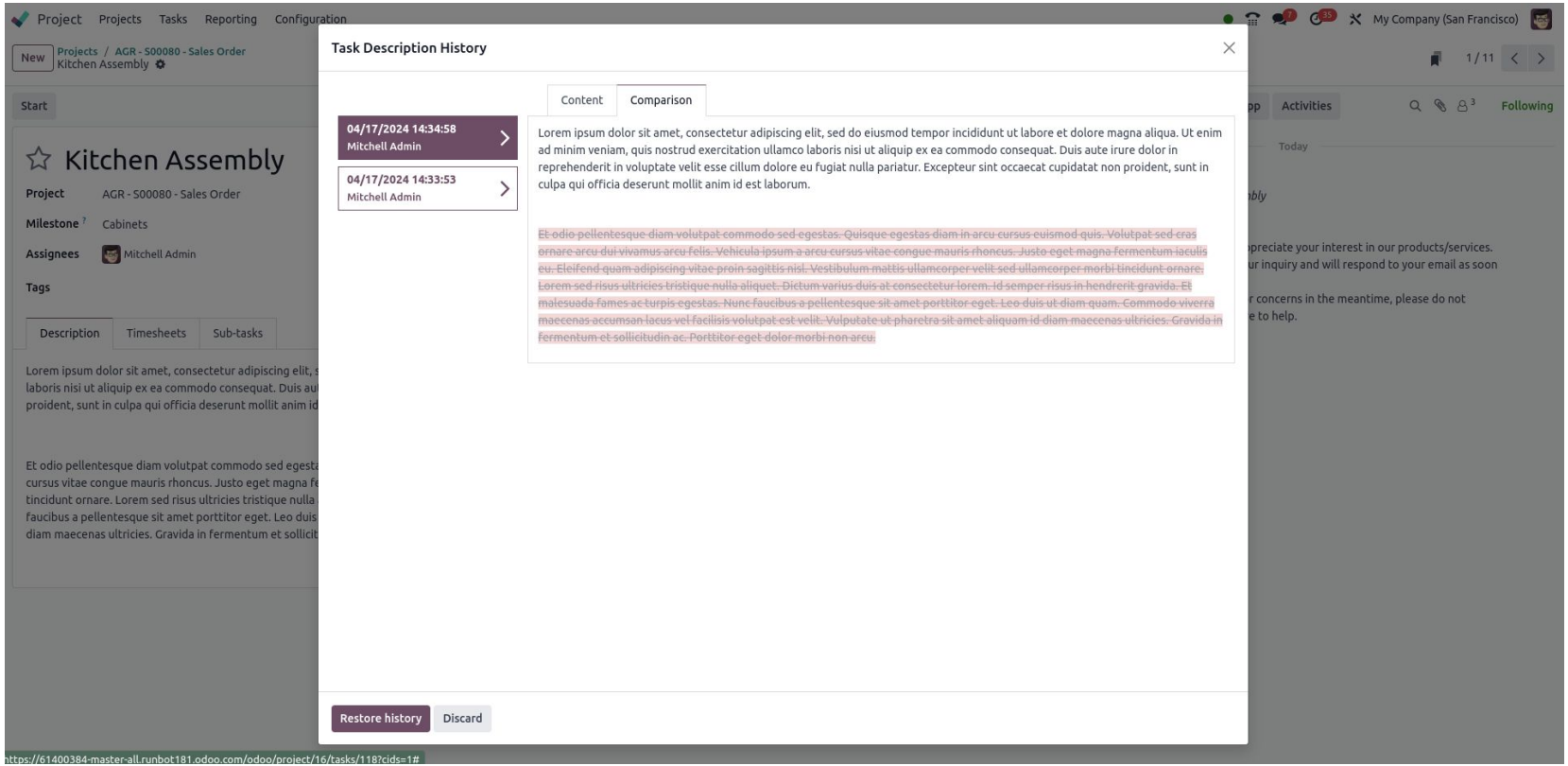
Top bar to browse related project records



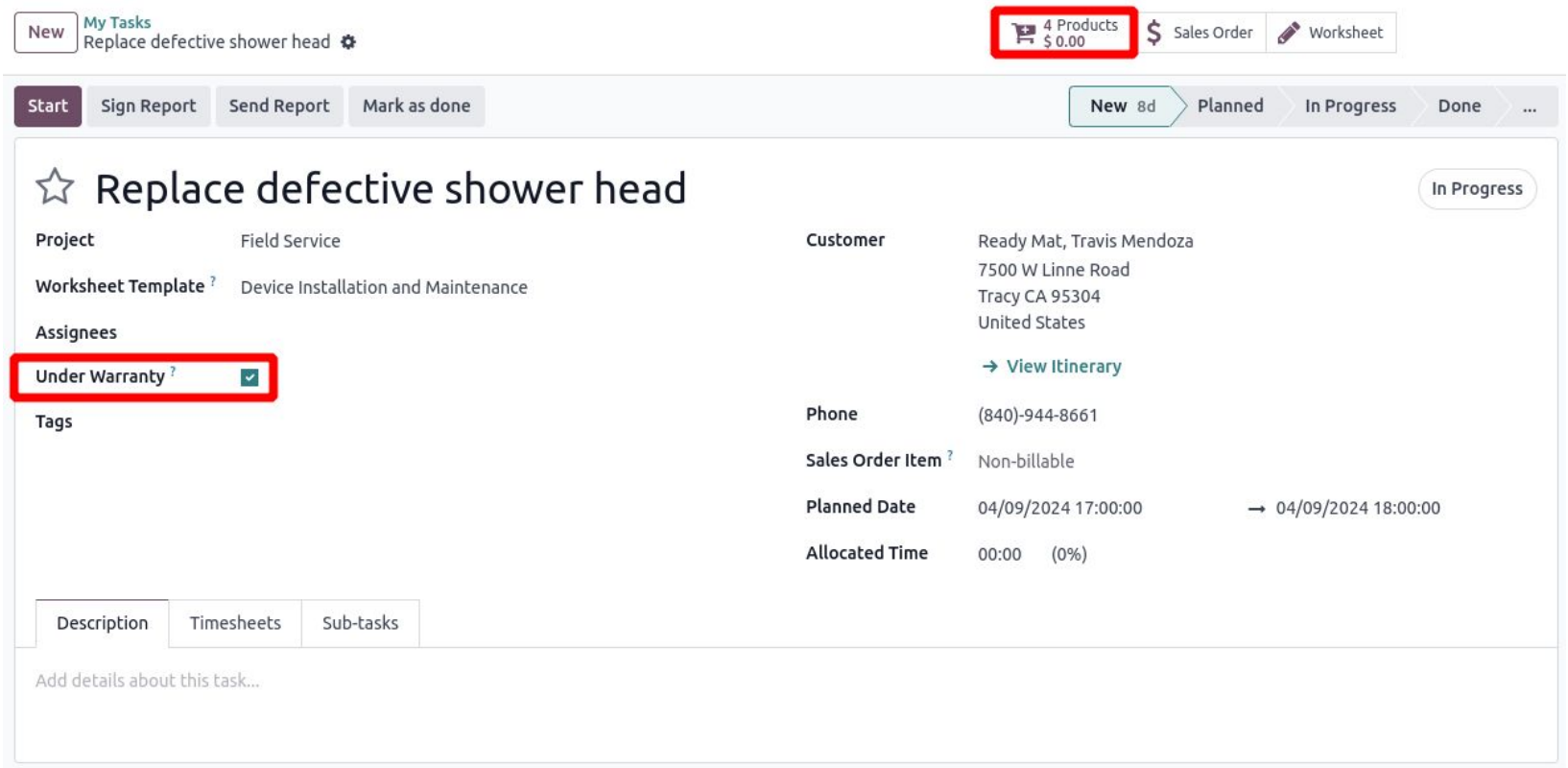
Find the right people based on their skills



Tracking revisions in tasks



Products under warranty



... 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**

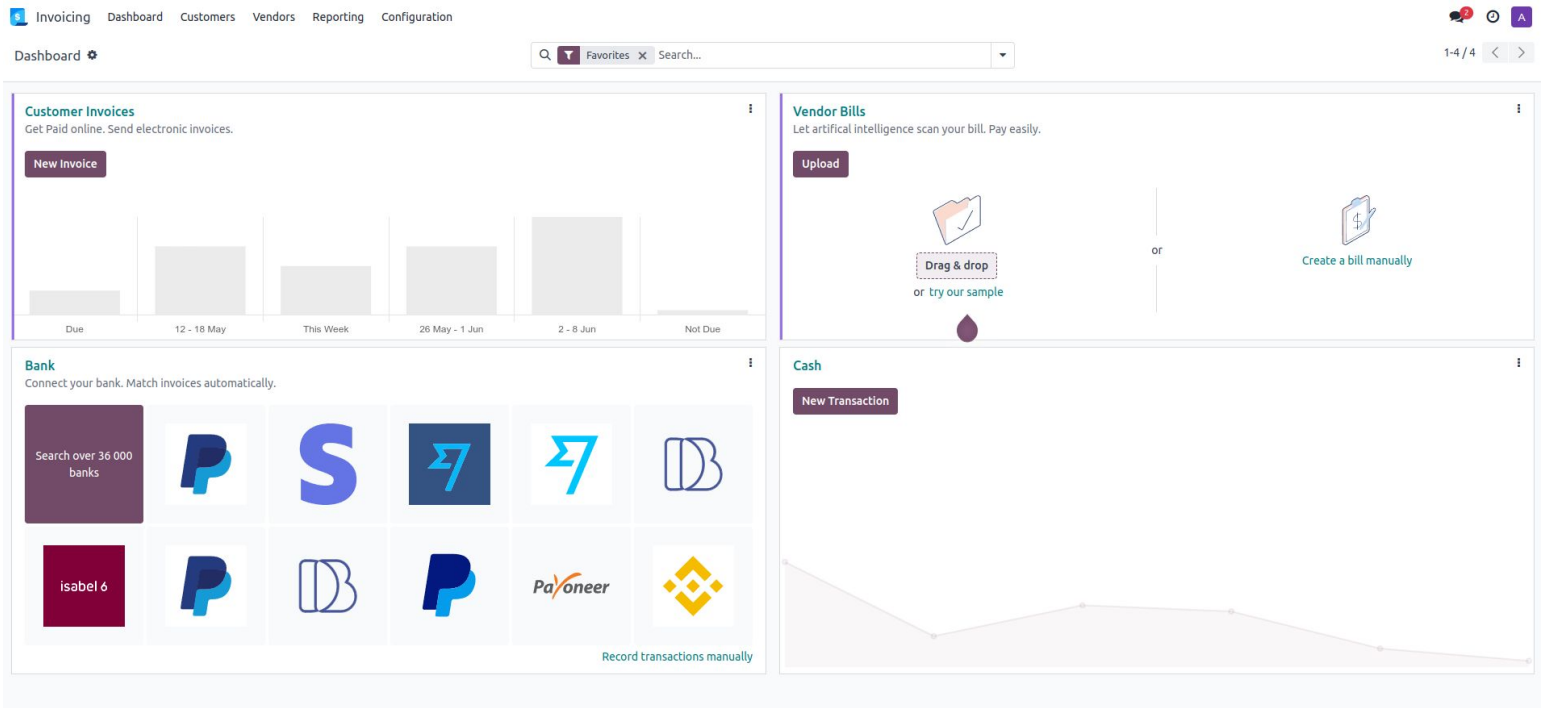
Planning

- **availabilities** are taken into account when generating **recurring** shifts

Accounting

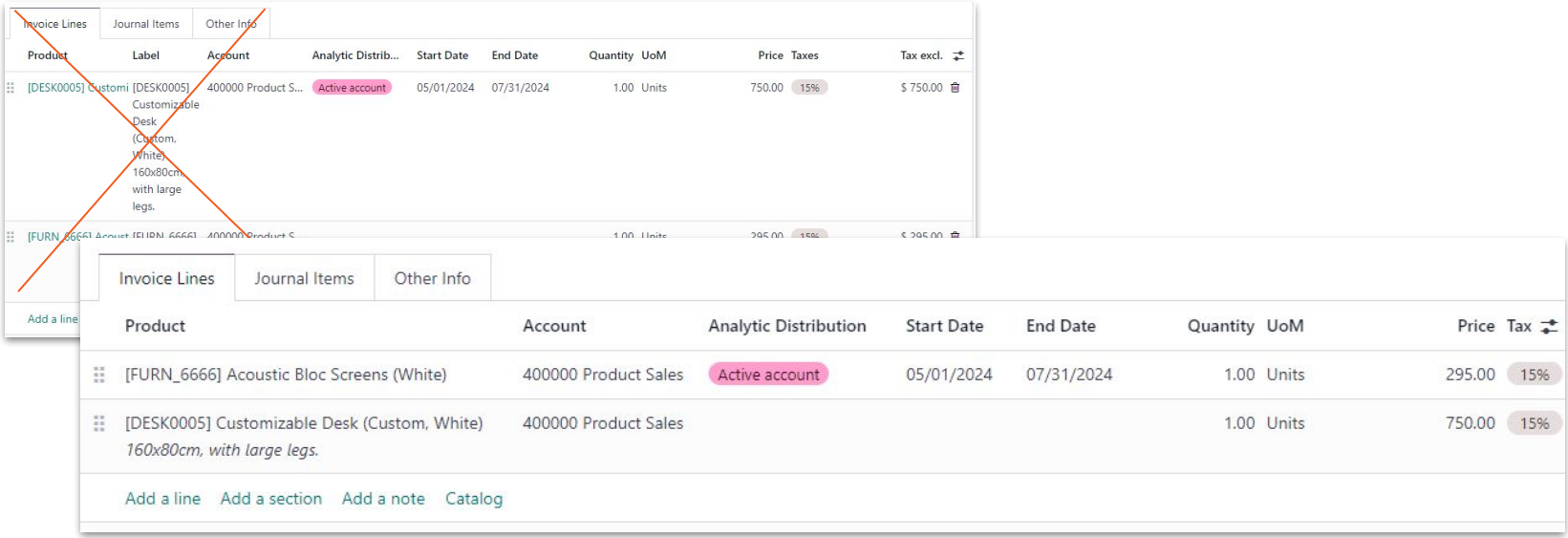
A new Invoicing for Enterprise !

- Same Dashboard
- Easier onboarding
- More features



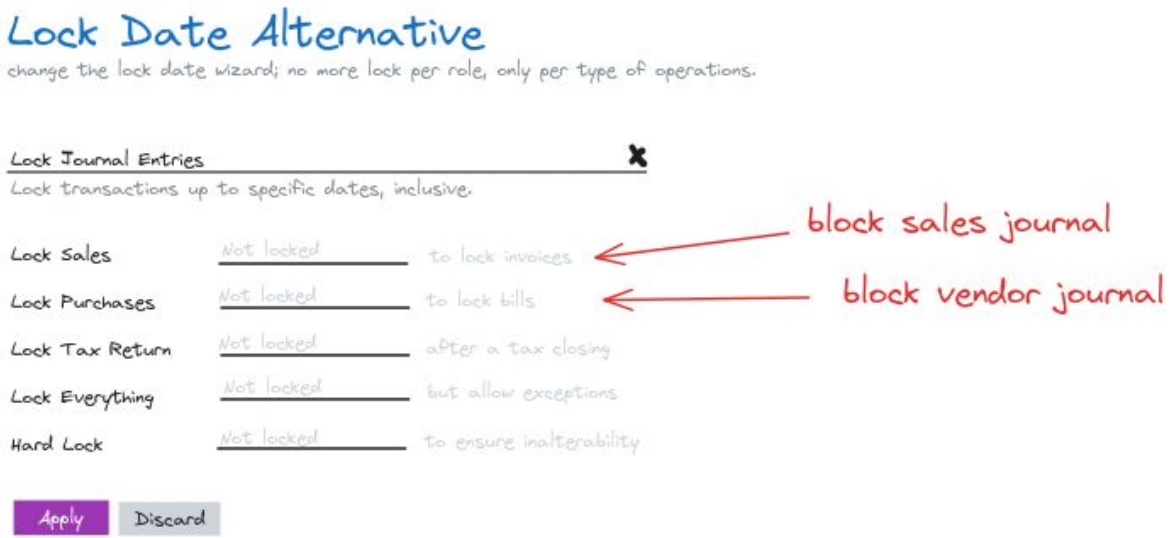
Invoice edition

- Product & description in one column
- Layout configuration preview
- Tax selection guide

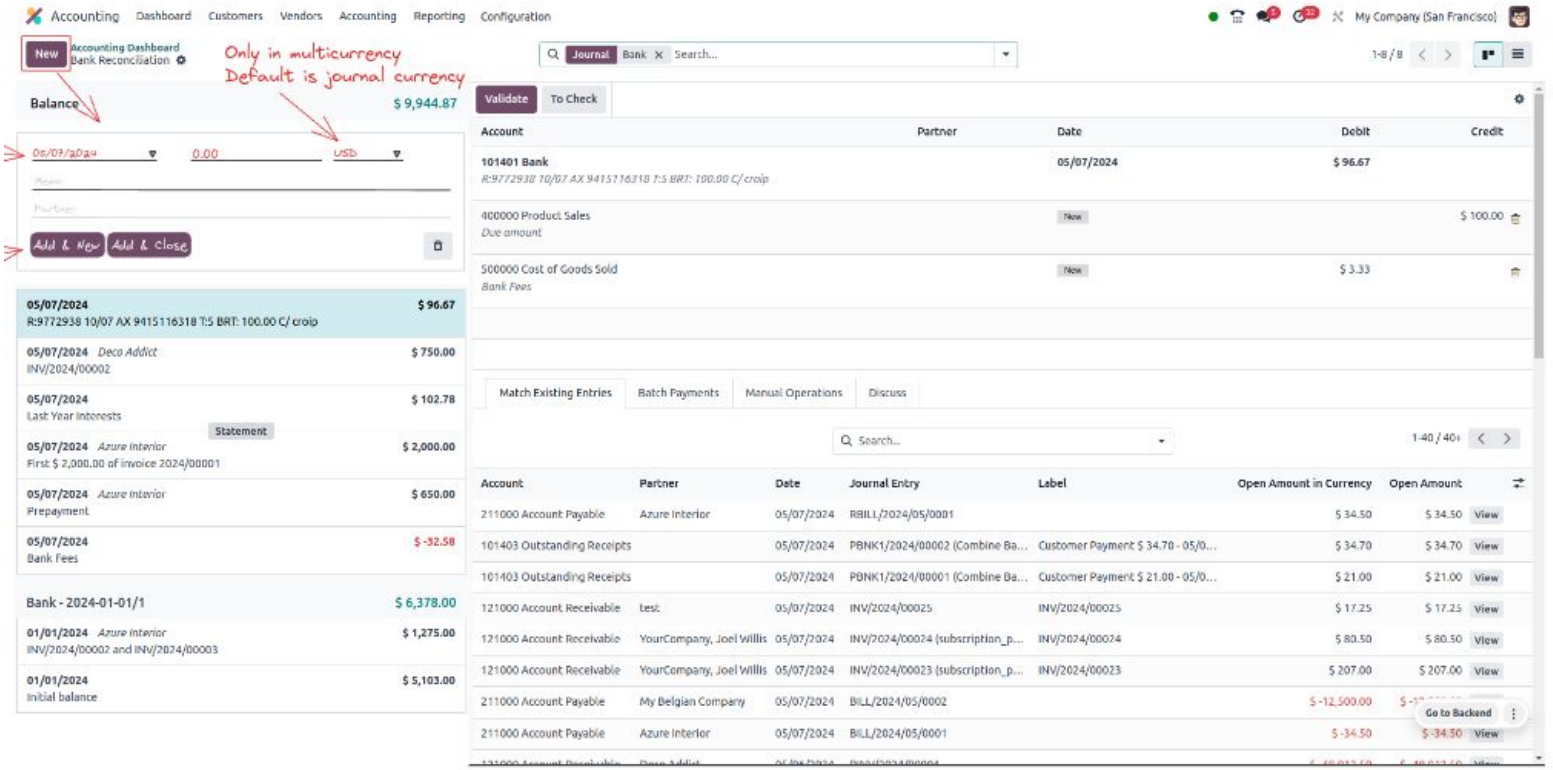


Lock dates

- Wizard revamp
- Hash on send rather than on post or on demand



Reconciliation : Kanban quick create



... 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

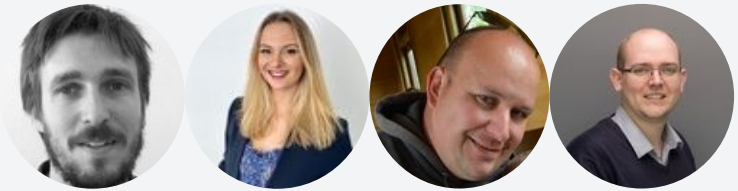
- Analytic **Budgets**
- Distribution **Models Combination**

Miscellaneous

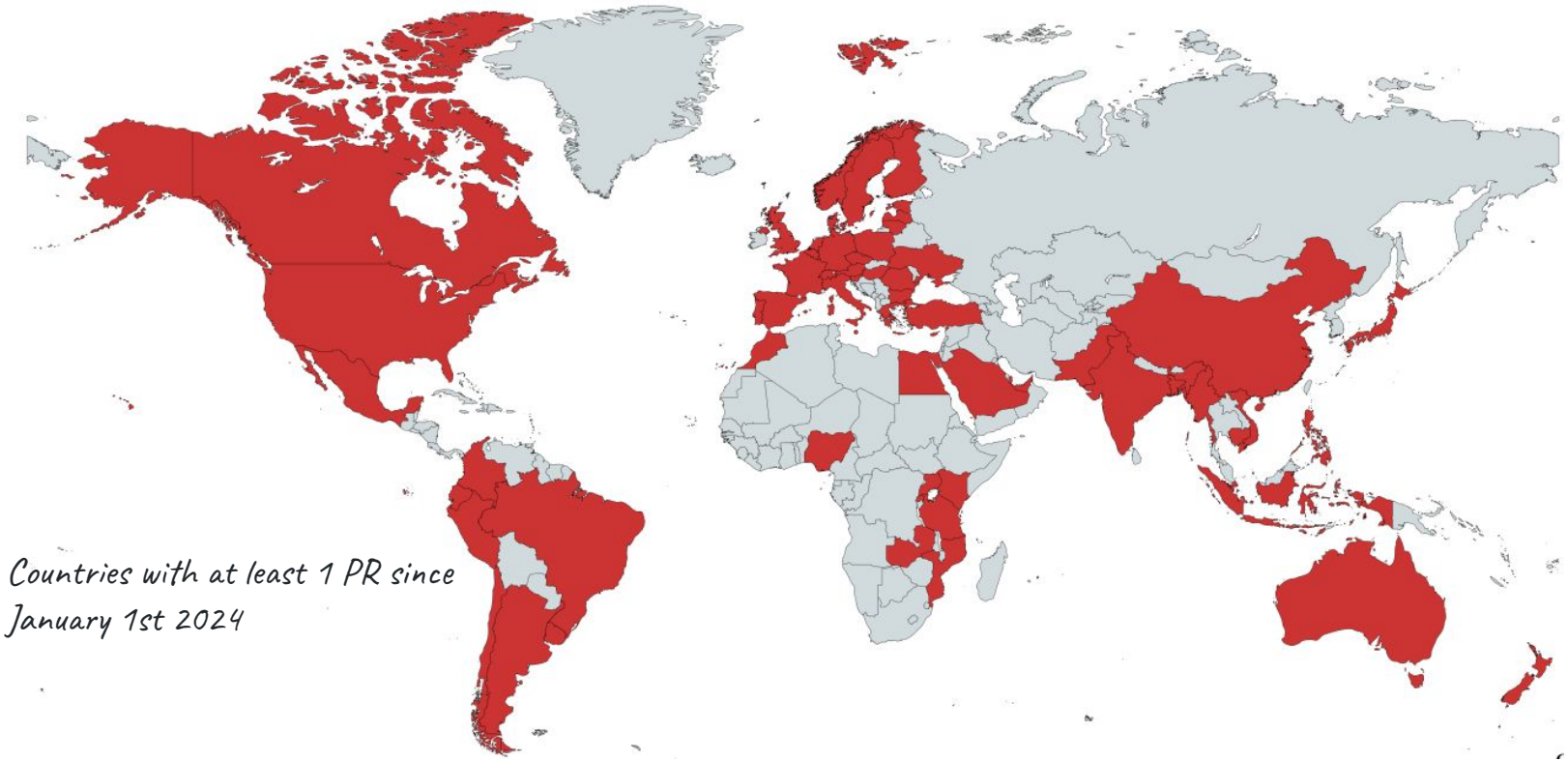
- **Intercompany** transactions
- Improved **Asset** management & import
- Automated **entries naming**
- **Email alias** on Misc journals

- Improved link with **Documents app**
- Improved **Expenses** integration

Localizations



Investing massively



Countries with at least 1 PR since January 1st 2024

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

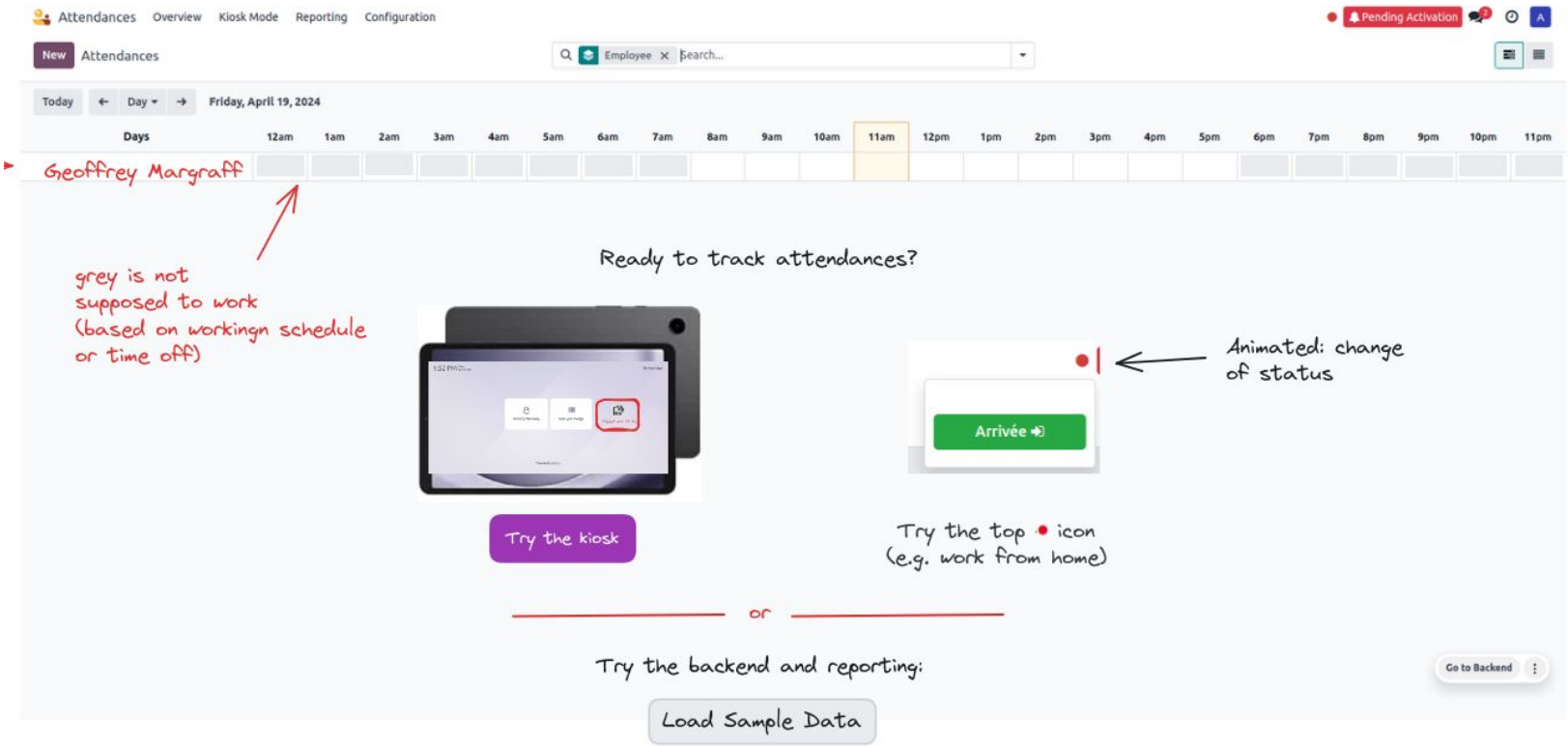
- Electronic invoicing
- Country specific reports, model or workflow

Localizations :
More than
Accounting

HR / Payroll

Attendances

- Report on Over time
- Management of fingerprints
- New Onboarding



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

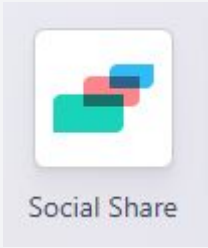
- **Property** fields on the complete flow
- Global **csv export** for banks
- **Headover** report
- **Editable** warnings on dashboard

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.

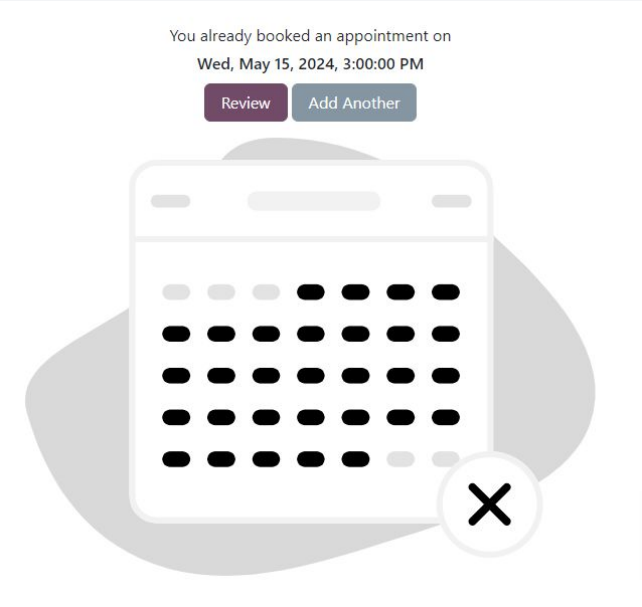
Better WhatsApp tools

WhatsApp added in a lot of flows (Inventory, Marketing

Automation, ...)

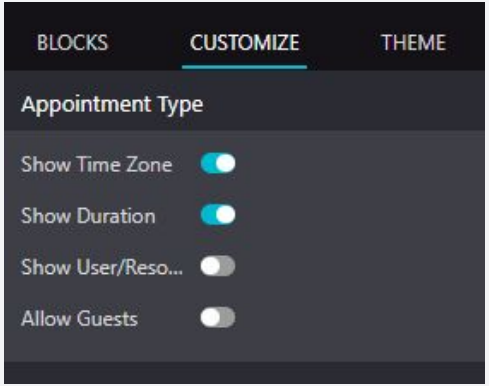
Appointment

- 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...

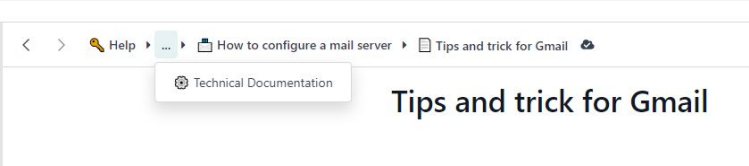
- A lot of Social Improvements
- Design your Marketing opt-out page
- Define the visibility of your Event (via a link public or logged users only)
- See who clicked in your Mailings
- Better Mail Composer
- New Marketing Automation onboarding
- Easier Mail Server configuration

... and a ton of other improvements!

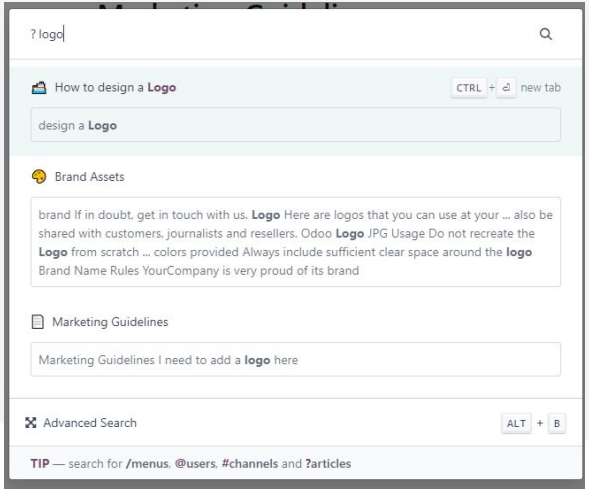
Knowledge

Knowledge made easier

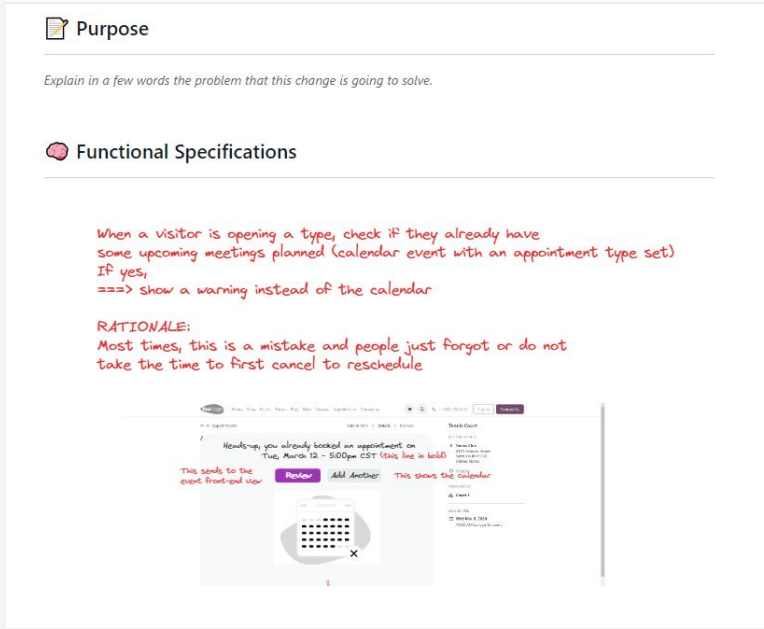
- Clearer Navigation: Always locate your article 🚢



- Search <u>inside</u> your Articles 🔍

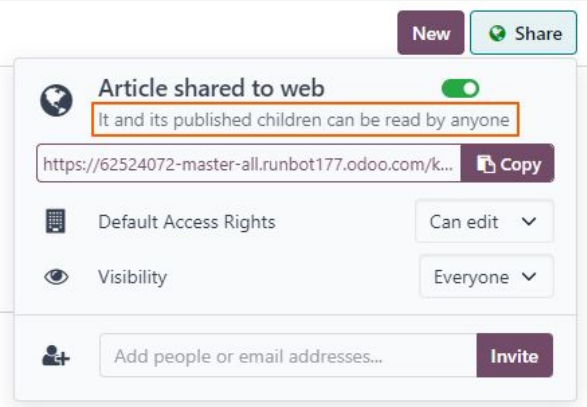


- Insert Excalidraw Scenes into Articles 👩‍🎨

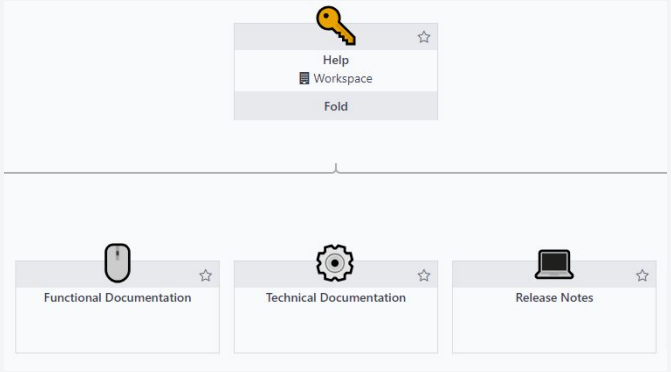


But also...

- Better Publishing Access 🌐



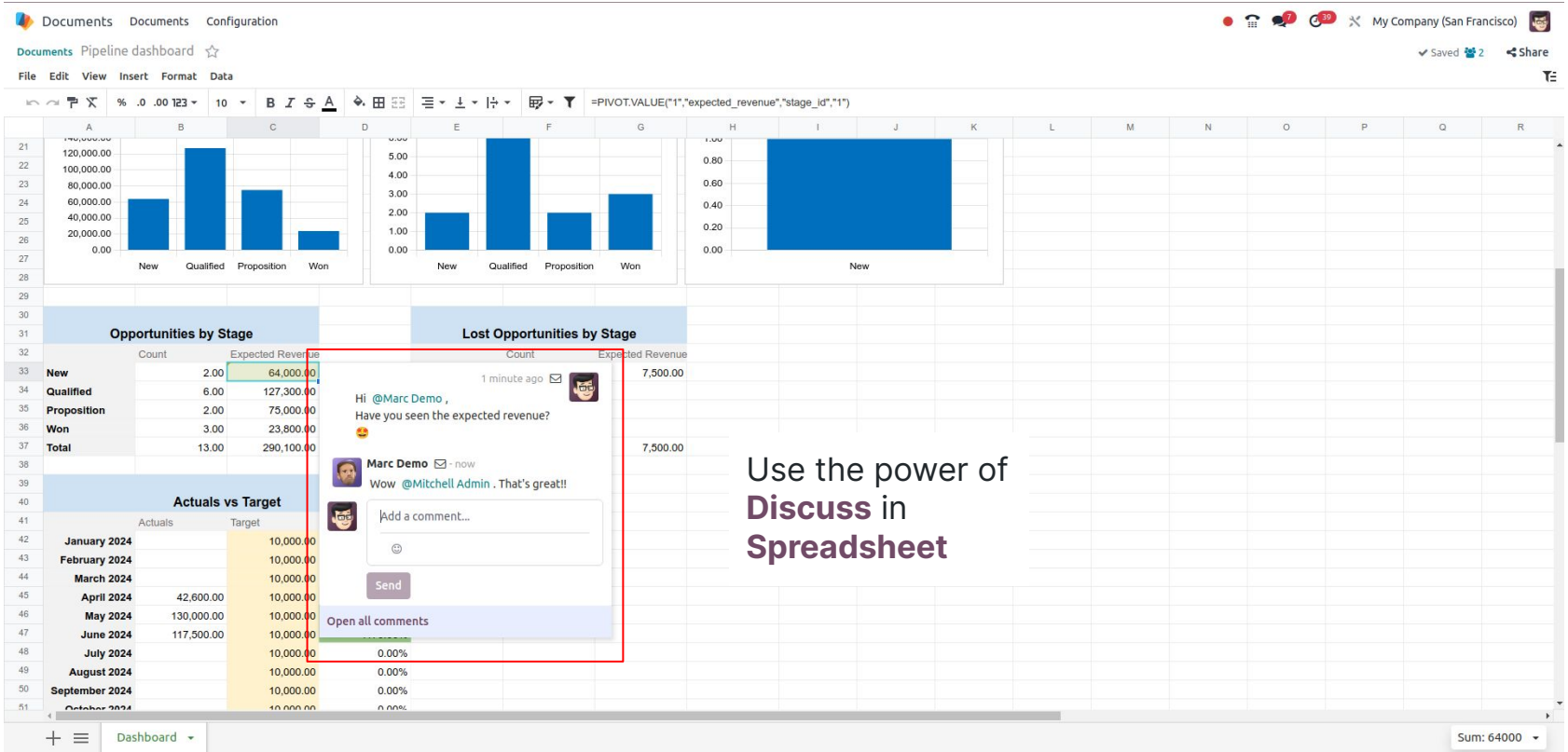
- Hierarchy View 📁



...and a lot of other improvements! 👌

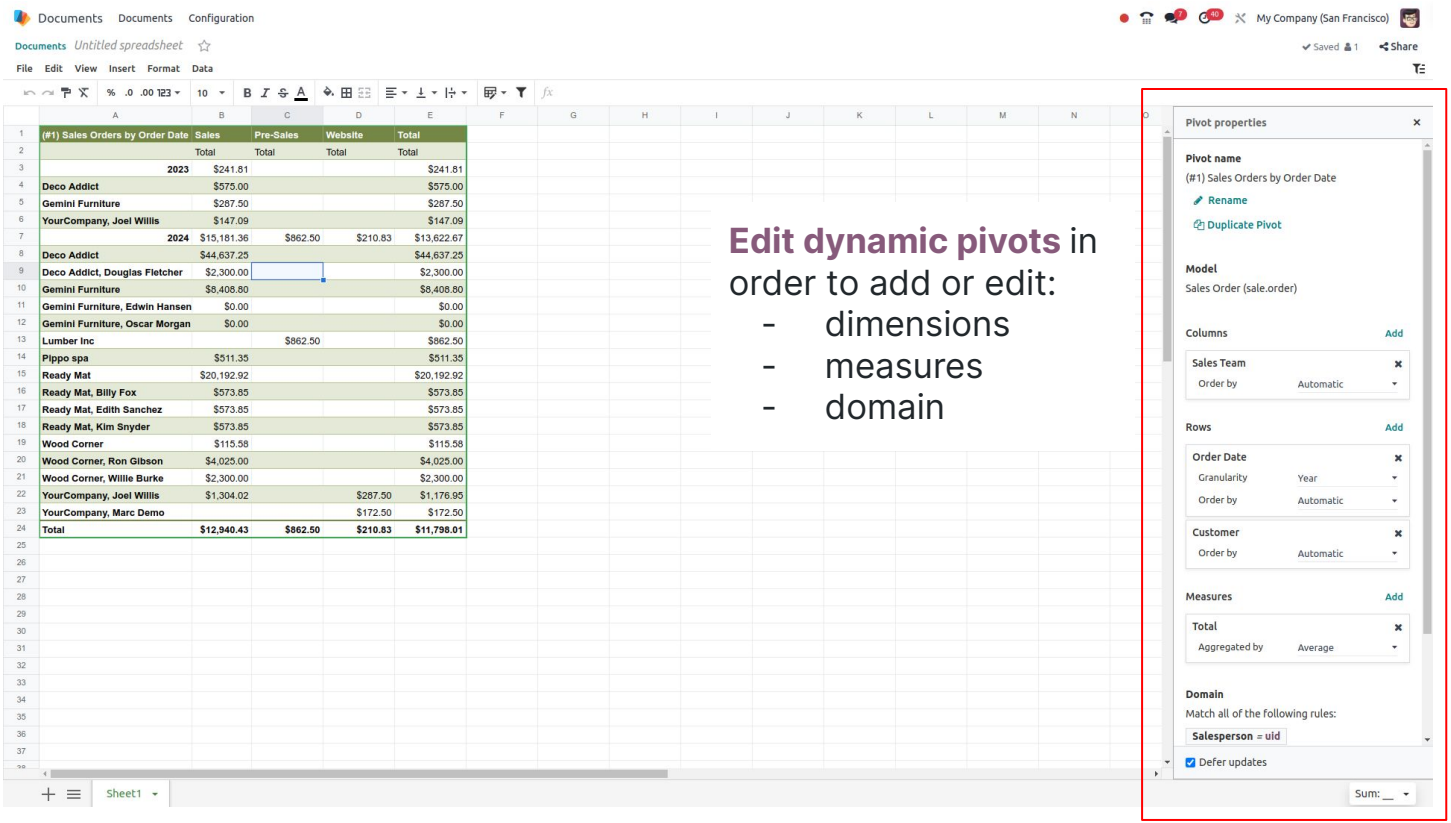
Spreadsheet & Dashboards

Comments on cell



Use the power of **Discuss** in **Spreadsheet**

Lists & Pivots edition

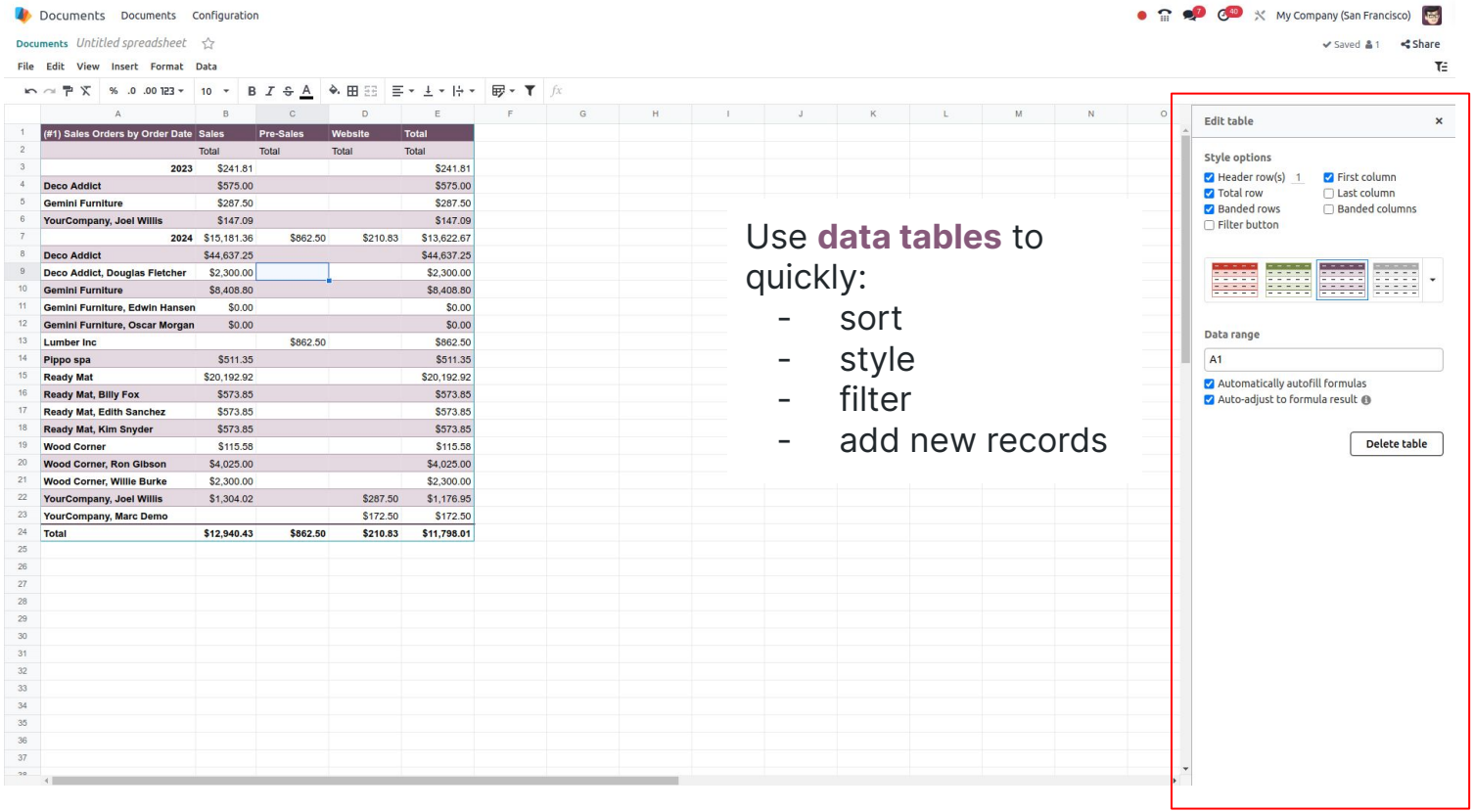


(#1) Sales Orders by Order Date	Sales	Pre-Sales	Website	Total
	Total	Total	Total	Total
2023	$241.81			$241.81
Deco Addict	$575.00			$575.00
Gemini Furniture	$287.50			$287.50
YourCompany, Joel Willis	$147.09			$147.09
2024	$15,181.36	$862.50	$210.83	$13,622.67
Deco Addict	$44,637.25			$44,637.25
Deco 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	$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	$862.50	$210.83	$11,798.01

Edit dynamic pivots in order to add or edit:

- dimensions
- measures
- domain

Data tables



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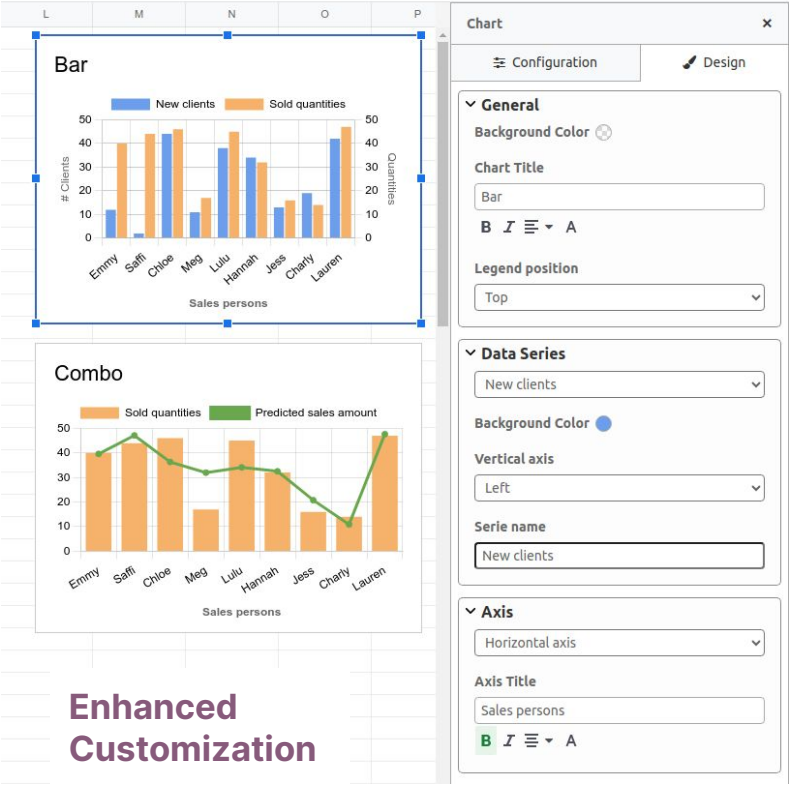
YourCompany, Marc Demo			$172.50	$172.50
Total	$12,940.43	$862.50	$210.83	$11,798.01

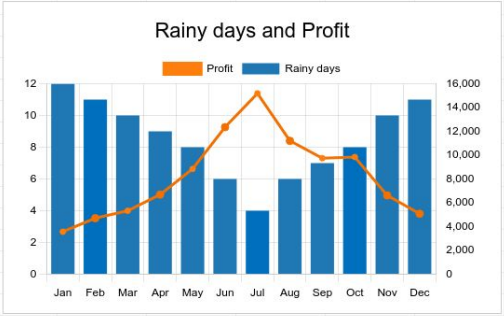
Use **data tables** to quickly:

- sort
- style
- filter
- add new records

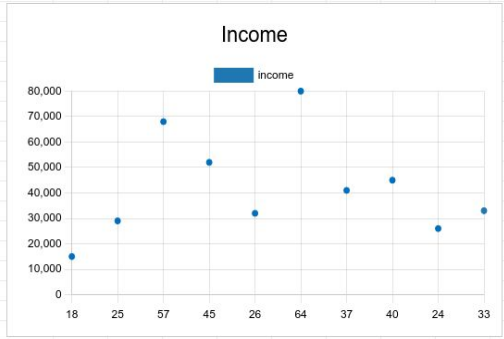
New charts & options



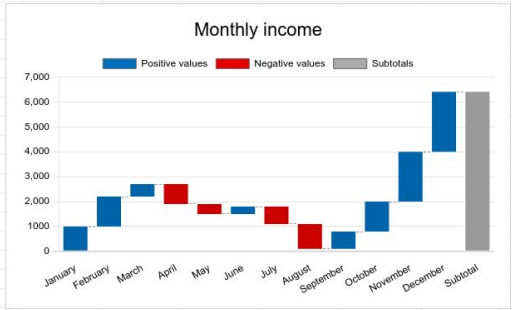
Enhanced Customization



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

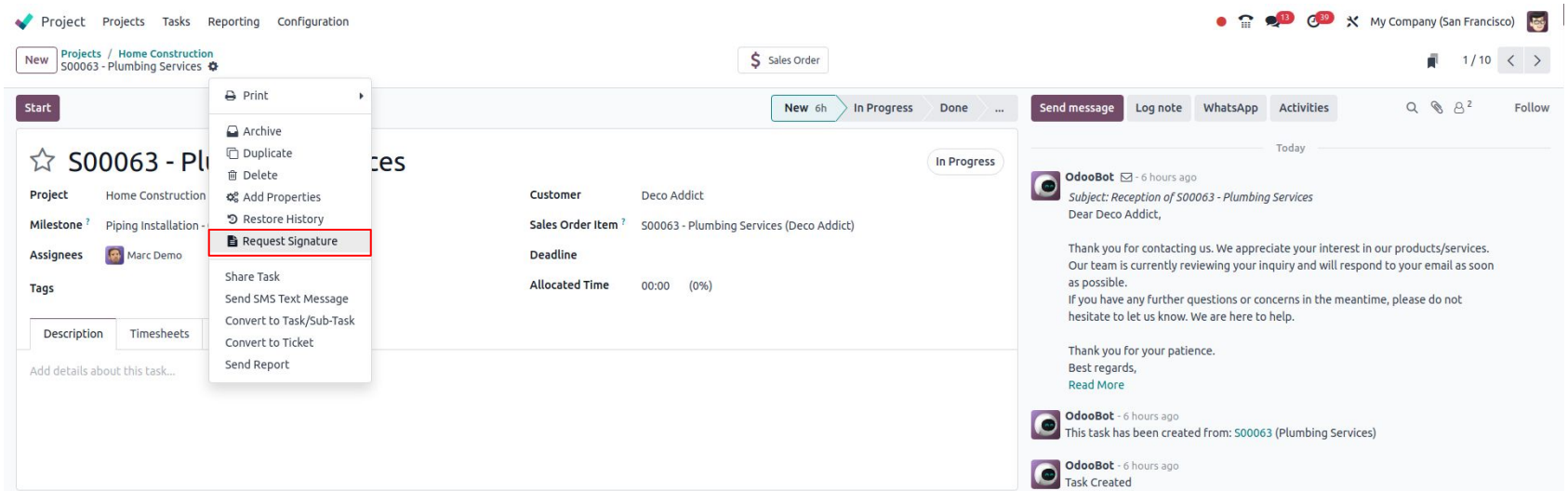
Documents

... 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

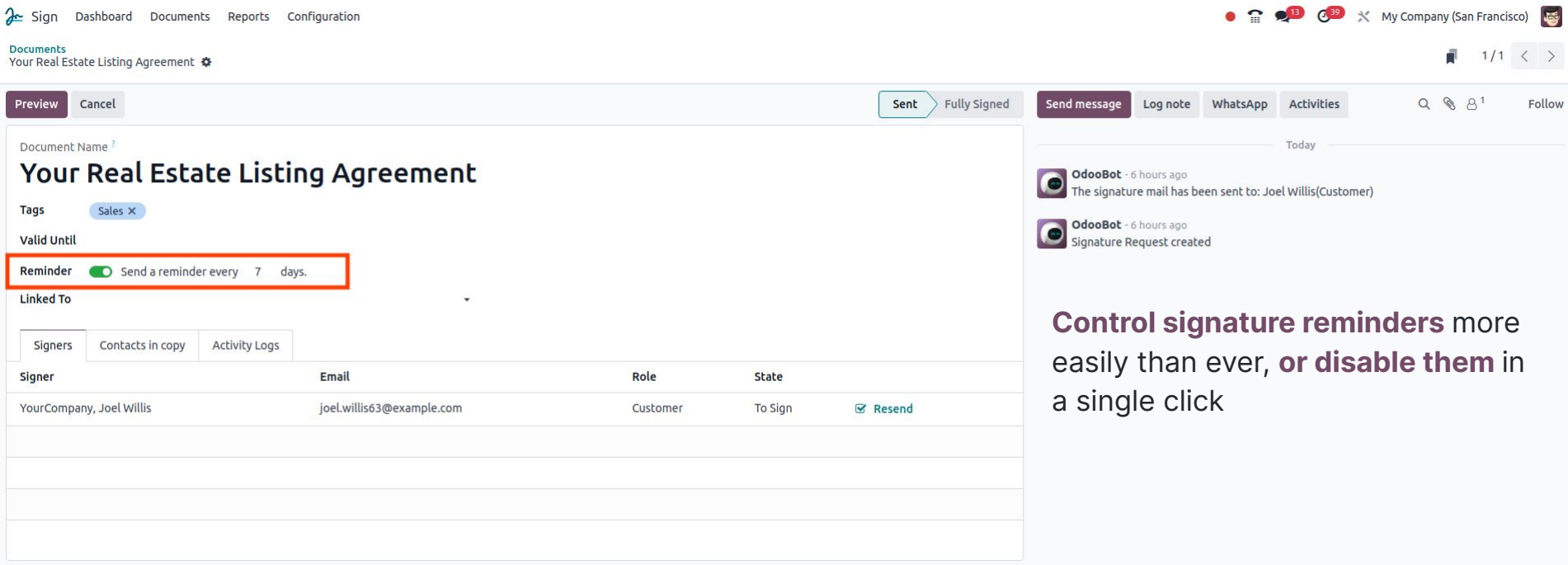
Sign

Request a signature from any document



Request a signature from any document in Odoo and **be notified when it is signed** automatically

Reminder



Control signature reminders more easily than ever, **or disable them** in a single click

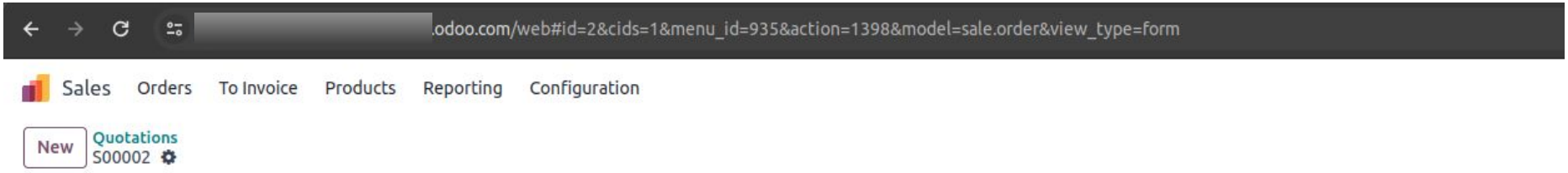
... And more!

- Addition of **radio buttons**
- Allow **strikethrough**
- **Touch-compatible** sign backend
- Send a **batch of documents** for signature

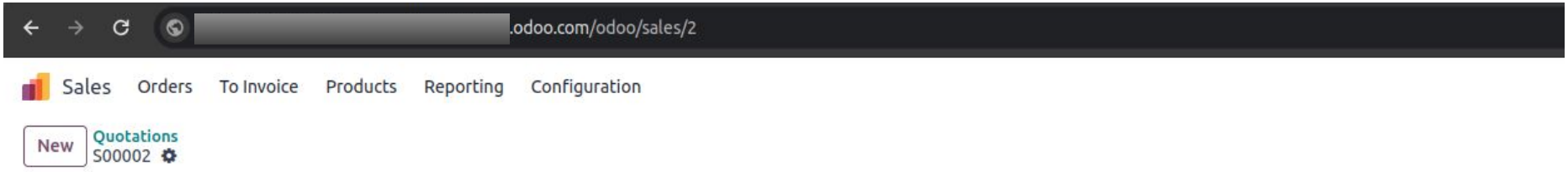
Framework

Nice URLs

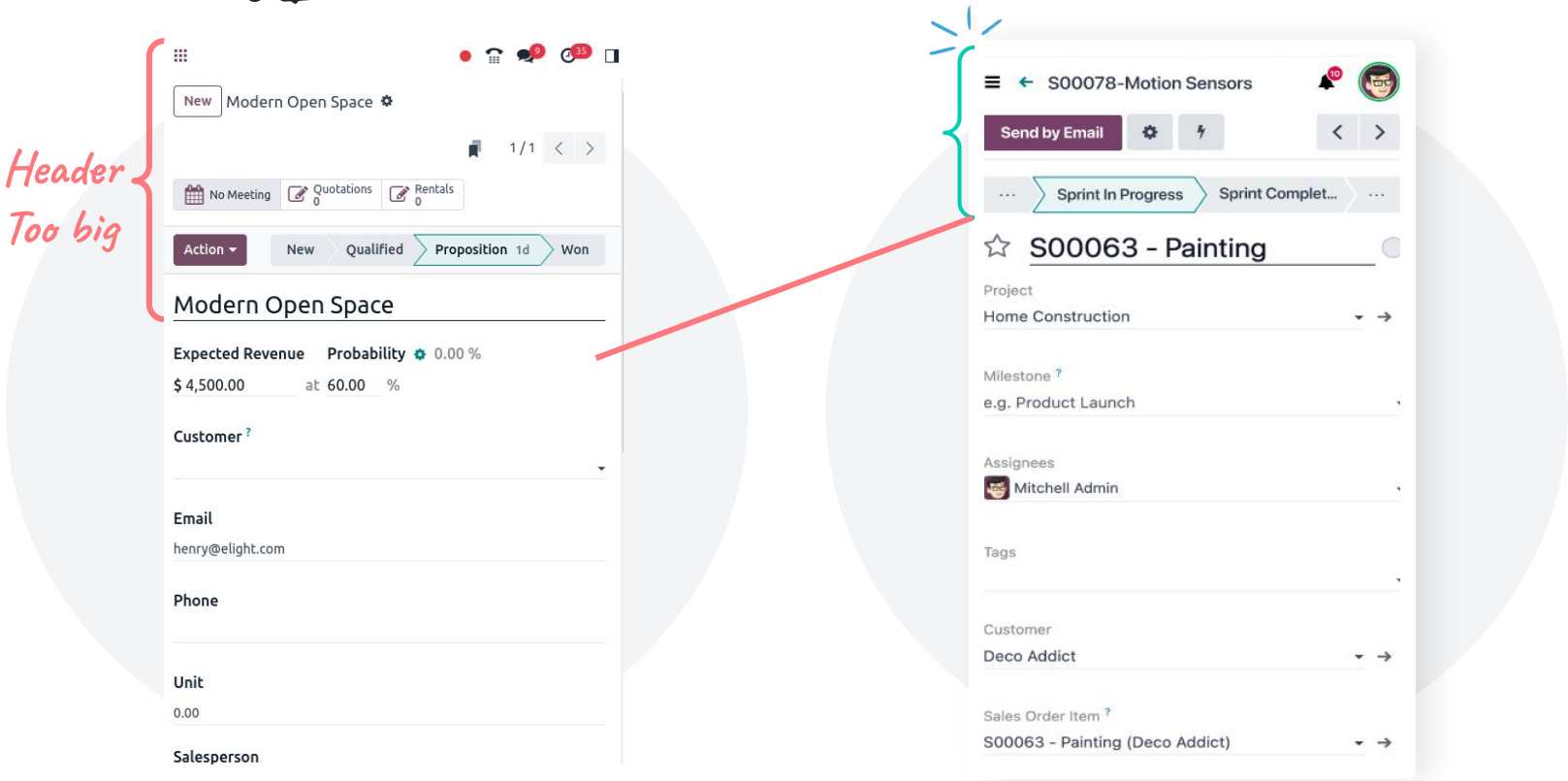
Before



After



New mobile UI



... 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