

# **Odoo Course Outline - Cohort-4**

The Odoo Cohort-4 is live, remote online course provides 16 hours of interactive, hands-on training. Participants attend 2-hour session per week, completing the program over a 2-month period.

This course will cover complete flow of

- 1) Procure to Pay (P2P) &
- 2) Order to Cash (O2C)

We will discuss:

- 1) Role of Artificial intelligence in ERPs
- 2) Agentic AI in Odoo AI
- 3) ERP Implementation Methodology

This will also include training of the Odoo core modules: CRM, Sales, Purchase, Inventory, Accounting and introduction of following modules:

Projects

Employees

Time off

Recruitment

Restaurant

Point of Sale (POS)

Website

eCommerce

Helpdesk

Knowledge Base

To-do

| Week    | Module / Topic                        | Detailed Contents                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| Class 1 | ERP Fundamentals & Industry Landscape | <b>ERP Fundamentals &amp; Industry Landscape</b><br>Introduction to Enterprise Resource Planning (ERP)<br>Evolution of ERP Systems<br>What is ERP?<br>Core Components of an ERP System<br>ERP Business Processes Overview<br>ERP Architecture and Concepts<br><b>ERP vs Traditional Systems</b><br>ERP vs Accounting Software<br>ERP vs Standalone Business Applications<br>ERP vs Spreadsheet-Based Operations<br>Integrated vs Disconnected Systems<br>Cloud ERP vs On-Premise ERP<br><b>ERP Vendor Landscape</b><br>Overview of Global ERP Market<br>ERP Vendor Selection Criteria<br>ERP Licensing Models<br>Open Source vs Proprietary ERP Solutions<br><b>ERP Vendor Comparison</b><br>SAP Overview and Positioning<br>Microsoft Dynamics 365 Overview<br>Oracle ERP Overview<br>Odoo ERP Overview<br>SAP vs Dynamics vs Oracle vs Odoo<br>Functional Comparison of ERP Vendors<br>Scalability and Flexibility Comparison<br>Industry Fit Analysis<br><b>Future of ERP</b><br>Cloud ERP Trends<br>AI and Automation in ERP<br>Business Intelligence and Analytics<br>ERP and Emerging Technologies<br>Future ERP Market Trends |

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| <b>Class 2</b> | Odoo System Navigation | <b>Odoo System Navigation</b><br>Introduction to Odoo ERP<br>Understanding the Odoo User Interface (UI)<br>Home Screen and Dashboard Navigation<br>Odoo Apps Overview<br>Menu Structure and Navigation<br>Favorites, Shortcuts, and Search Functions<br>Global Search and Filters<br><b>Odoo View Types</b><br>List View Navigation and Usage<br>Kanban View Navigation and Usage<br>Calendar View Navigation<br>Activity View Navigation<br>Pivot View Analysis<br>Graph View Analysis<br>Switching Between Views<br><b>User Management &amp; Security</b><br>User Creation and Management<br>Understanding User Roles<br>Access Rights Configuration                                                                                                                                                                  |
| <b>Class 3</b> | Master Data            | <b>Master Data Management in Odoo</b><br>Introduction to Master Data Management (MDM)<br>Importance of Master Data in ERP Systems<br>Master Data Governance Overview<br>Business Requirements Gathering<br>Stakeholder Identification and Data Ownership<br>Customer Master Data Identification<br>Vendor Master Data Identification<br>Product Master Data Identification<br>Financial Master Data Identification<br><b>Data Preparation &amp; Quality</b><br>Master Data Collection Techniques<br>Data Assessment and Profiling<br>Master Data Cleansing<br>Duplicate Detection and Removal<br>Data Enrichment Techniques<br><b>Template Design &amp; Preparation</b><br>Master Data Mapping and Field Analysis<br>Odoo Import Template Structure<br>Master Data Template Preparation<br>Mandatory vs Optional Fields |

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| <b>Class 4</b> | Procurement (P2P)            | <b>Supplychain-1</b><br>Procurement (Purchase Management)<br>Introduction to Odoo Procurement Process<br>Procurement Workflow Overview<br>Vendor Master Data Management<br>Purchase Agreements and Blanket Orders<br>Request for Quotation (RFQ) Creation<br>RFQ Comparison and Vendor Selection<br>Purchase Approval Workflows<br>Vendor Pricelists Management<br>Lead Times Configuration<br>Procurement Rules and Replenishment<br>Make-to-Order (MTO) Process<br>Dropshipping Process<br>Purchase Receipts Management<br>Three-Way Matching (PO, Receipt, Vendor Bill)<br>Procurement Reporting and Analytics<br>Procurement Best Practices<br>Procurement Automation |
| <b>Class 5</b> | Inventory (P2P)              | <b>Supplychain-2</b><br>Inventory (Warehouse Management)<br>Introduction to Odoo Inventory Management<br>Inventory Structure and Configuration<br>Warehouse Setup<br>Storage Locations Management<br>Product Categories and Inventory Impact<br>Units of Measure (UoM)<br>Inventory Operations Types<br>Stock Receipts Process<br>Internal Transfers<br>Delivery Orders Process<br>Stock Valuation Methods (FIFO, AVCO, Standard Cost)<br>Lot and Serial Number Tracking<br>Expiration Date Management<br>Reordering Rules<br>Putaway and Removal Strategies<br>Inventory Reporting and KPIs<br>Inventory Best Practices                                                  |
| <b>Class 6</b> | CRM & Sales Management (O2C) | What is CRM?<br>What are the benefits of CRM implementation?<br>Odoo CRM Architect<br>Odoo CRM Lead Generation<br>CRM pipeline setup<br>Sales Quotations<br>Sales Orders<br>Integration with inventory and accounting<br>Sales dashboards and KPIs                                                                                                                                                                                                                                                                                                                                                                                                                        |

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| <p><b>Class 7</b></p> | <p>Accounting &amp; Finance in Odoo</p> | <p><b>Accounting &amp; Finance in Odoo</b><br/> Introduction to Odoo Accounting<br/> Accounting Configuration and Setup<br/> Chart of Accounts Configuration<br/> Account Types and Structure<br/> Journals Configuration<br/> Journal Entries and Postings<br/> Multi-Currency Management<br/> Taxes and Tax Configuration<br/> Customer Master Data for Accounting<br/> Vendor Master Data for Accounting<br/> <b>Accounts Receivable (AR)</b><br/> Customer Invoicing Process<br/> Credit Notes and Refunds<br/> Customer Payments Processing<br/> Payment Matching and Reconciliation<br/> Outstanding Receivables Management<br/> Customer Aging Analysis<br/> <b>Accounts Payable (AP)</b><br/> Vendor Bill Processing<br/> Vendor Credit Notes<br/> Vendor Payment Processing<br/> Payment Matching and Reconciliation<br/> Outstanding Payables Management<br/> Vendor Aging Analysis<br/> <b>Banking &amp; Cash Management</b><br/> Bank Account Setup<br/> Bank Journals Configuration<br/> Bank Statement Import<br/> Bank Reconciliation Process<br/> Cash Management<br/> <b>Financial Reporting</b><br/> General Ledger (GL)<br/> Trial Balance<br/> Balance Sheet<br/> Profit &amp; Loss Statement (P&amp;L)<br/> Cash Flow Statement<br/> Aged Receivable Report<br/> Aged Payable Report</p> |
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| <p><b>Class 8</b></p> | <p>Intorduction to important modules of Odoo, Odoo AI Agent &amp; Odoo Implementation Methodology</p> | <p><b>HR Modules:</b><br/> Employees<br/> Time off<br/> Recruitment</p> <p><b>Sales Modules:</b><br/> Restaurant<br/> Point of Sale (POS)<br/> Website<br/> eCommerce</p> <p><b>Services Modules:</b><br/> Projects<br/> Helpdesk</p> <p><b>Productivity modules:</b><br/> Knowledge Base<br/> To-do<br/> Calendar</p> <p><b>Implementation guidelines:</b><br/> Implementation methodologies (Waterfall, Agile, Hybrid)<br/> Odoo implementation lifecycle<br/> ERP team roles (Consultant, PM, BA, FC, Dev)<br/> Change management concepts<br/> Documentation types BRD, SDD, UAT, User Manuals,<br/> Go-Live checklist<br/> Final Project review: End-to-end Odoo implementation.</p> <p><b>Odoo AI Agents:</b><br/> Introduction to role of artificial intelligence in ERPs<br/> Role &amp; future of Agentic AI in ERPs<br/> Artificial intelligence in Odoo<br/> Odoo AI Agent</p> |
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