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Odoo Accounting training
1 day (7 hours)

Presentation

Use Odoo all-in-one ERP to optimize and manage your accounting processes! Take advantage of a modern, intuitive interface to track the life cycle of your customers. This tool will save you precious time by managing your prospects and opportunities, enabling you to track your leads and future business.

This tool offers you significant time savings thanks to its ability to manage your accounts receivable, payable, invoicing, etc. Our Odoo accounting training course will first introduce you to the interface and its navigation. Through practical exercises, you'll learn how to build your first Odoo accounting database.

You'll learn about the different functions of the accounting module and how it integrates with other modules (Sales, Purchasing, Inventory, etc.).

Following this course, you'll know how to use Odoo for your accounting missions. As always, we'll be teaching you the latest version of the tool presented: Odoo 17.

Objectives

- Understanding and using the Odoo accounting interface
- Configure and use Odoo's accounting module
- Set different options for invoicing, accounting, etc. software

Target audience

- Financial managers
- Accountants
- Financial project managers

- Financial managers

Prerequisites

No prerequisites, knowledge of Odoo is appreciated.

Technical requirements

- If you are using Windows, you will need a virtual machine with Linux or WSL installed.

Odoo Accounting training program

Navigating Odoo

- Login
- Discovering the dashboard
- Exploring screens and views
- Using filters, groupings and favorites
- Data entry
- Navigation between screens (breadcrumb trail)

Creating your own Odoo database (practical exercise)

- General configuration
- Data creation: accounts, accounting journals, taxes, products and services
- Setting up accounting parameters
  - Chart of accounts
  - Company motto
  - Fiscal years
- Setting up numbering sequences for accounting documents

Using the accounting module (practical exercise)

- Creation and management of customer and supplier invoices
- Recording and tracking payments
- Customer reminder management
- Creation and follow-up of accounting entries
- Bank reconciliation
- Year-end closing and retained earnings

Additional themes

- Cash management: cash forecasting, monitoring of cash receipts and disbursements, investment and loan management
- Tax: VAT management, tax returns, integration with accounting system
- Financial reports: balance sheet, income statement, general ledger, trial balance, journals
- Configuring and using management control tools
  - Budgets
  - Cost centers

Companies concerned

This training course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced computer technology, or to acquire specific business knowledge or modern methods.

Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the training to come, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

Teaching methods

Practical course: 60% Practical, 40% Theory. Training material distributed in digital format to all participants.

Organization

The course alternates theoretical input from the trainer, supported by examples, with brainstorming sessions and group work.

Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

Sanction

A certificate will be issued to each trainee who completes the course.