

Odoo Onboarding Requirements Checklist

A comprehensive guide to all information, documents, and configurations required for a successful Odoo implementation and onboarding process. Follow this checklist to ensure a smooth, structured go-live.

IMPLEMENTATION GUIDE

INDIA EDITION

Phase 1: Discovery & Setup

Week 1

Phase 2: Master Data & Configuration

Week 2-3

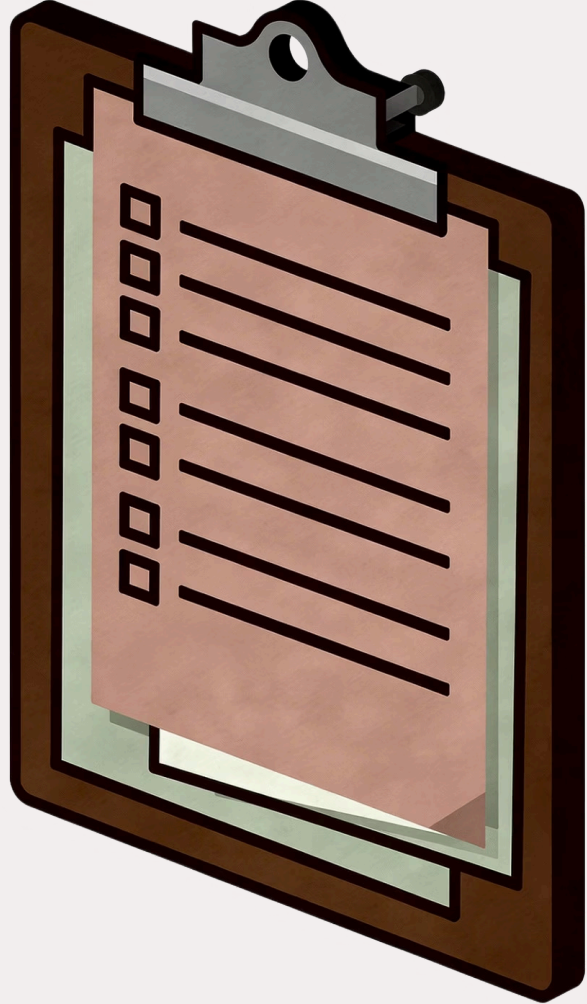
Phase 3: Testing & Training

Week 4-5

Phase 4: Go-Live & Handover

Week 6

Total estimated duration: 6 Weeks



Phase 1

Discovery & Setup

1 Weeks

Duration

(Week 1)



Focus

Company Info & Users

Collect all foundational company information, define users, roles, and access rights before system setup begins.

Company Information

Gather all foundational company details before beginning the Odoo setup. These are required for legal compliance, invoicing, and system configuration.

Legal & Identity

- Company Name
- GST Number
- PAN Number
- CIN Number (if applicable)
- Authorized Signatory Details

Address & Banking

- Registered Office Address
- Branch Addresses
- Bank Account Details
- Financial Year Start Date
- UPI ID for QR Code

Branding

- Company Logo (high resolution)

i Ensure all legal identifiers (GST, PAN, CIN) are verified and up to date before submission to avoid delays in configuration.

User Details & Access Rights

Define your organization's user structure, roles, and approval hierarchy to configure access controls correctly in Odoo.

1

Employee & User List

Full list of employees and users who will access the system, including their email IDs and mobile numbers.

2

Department Names

Organizational department structure to map users to the correct teams and workflows within Odoo.

3

User Roles & Access Rights

Define what each user can view, create, edit, or approve — aligned with job responsibilities.

4

Approval Hierarchy

Document the chain of approvals for sales orders, purchase orders, expenses, and other key transactions.

Phase 2

Master Data & Configuration

3

Duration

(Week 2 ~3-5 Day)



Focus

Data, Tax & Docs

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Prepare and submit all master data — accounting, sales, purchase, inventory, HR — along with statutory configuration and document formats.

Master Data – Sales & Purchase

Customer Master

The customer master is critical for smooth sales operations. Ensure the following fields are populated in your Excel import file:

Mandatory Fields

- Customer Name
- Company Type
- Street 1, City, State, Country
- GST Treatment

Recommended Fields

- Customer Code, Contact Person
- Mobile, Email, PIN
- GST Number, PAN Number
- Payment Terms, Credit Limit
- Salesperson, Tags, Active

Sales Configuration

- Price Lists
- Sales Person Details
- Sales Team Details
- Terms & Conditions

Vendor Master & Purchase

- Vendor Master Data
- Payment Terms & Conditions
- Purchase Terms
- Vendor Price Lists

📄 Sample Excel Columns: Customer Name | Company Type | Customer Code | Contact Person | Mobile | Email | Street 1 | Street 2 | City | State | Country | PIN | GST Number | PAN Number | GST Treatment | Payment Terms | Credit Limit | Salesperson | Tags | Active

Master Data – Inventory

Product & Category Data

- Product Master (Name, Code, Type, UOM, Sales Price, Cost Price)
- Product Categories & Sub-categories
- Units of Measure (UOM) & UOM Categories
- Product Tracking
- Reordering Rules & Min/Max Qty

Warehouse & Stock Data

Warehouse Details & Locations

Stock Opening Quantities (by product & location)

Lot / Serial Number Data (if applicable)

Inventory Valuation Method (FIFO / Average / Standard)

Scrap & Adjustment Locations

i All product master data should be submitted in the provided Excel template at least 3 business days before go-live.

Master Data – Manufacturing

Required only if Manufacturing module is in scope.

Bill of Materials (BOM)

- Finished Product Name & Code
- Component / Raw Material List
- Component Quantities & UOM
- BOM Type (Manufacture / Kit / Subcontracting)
- By-products (if any)

Work Centers & Routing

- Work Center Names
- Capacity & Working Hours
- Machine & Labor Cost per Hour
- Routing Steps / Operations
- Operation Duration (Setup + Processing)

Production Configuration

- Manufacturing Lead Time
- Scrap % per Component
- Quality Control Points
- Subcontracting Vendors (if any)
- MTO vs MTS Strategy



BOM data is critical for accurate production costing. Ensure all component quantities and work center costs are validated before import.

Master Data — Accounting

Accurate accounting master data is the backbone of your Odoo financial setup. Prepare the following before configuration begins.

→ Chart of Accounts (COA)

Your complete account structure for financial reporting.

→ Opening Balance

Verified balances as of the go-live date for all accounts.

→ Customer & Vendor Outstanding

All open receivables and payables to be migrated.

→ Bank Opening Balances

Confirmed bank balances for each account at go-live.

Fixed Asset

Complete list of assets

GST Configuration

GST rates, HSN/SAC codes, and applicable tax rules.

TDS/TCS Configuration

All applicable TDS sections and TCS settings for Indian compliance.

Statutory, Tax & Business Process Configuration

Statutory & Tax Configuration (India)

GST Setup

GST Rates and HSN/SAC Codes for all products and services.

E-Invoice & E-Way Bill

Configuration details and credentials for government portals.

TDS/TCS & MSME

TDS sections, TCS settings, and MSME vendor identification list.

Business Process Information

Current Workflow Documents

Existing process flows and SOPs to be replicated or improved in Odoo.

Approval Processes

Multi-level approval chains for transactions and documents.

Reporting Requirements

Custom reports, dashboards, and KPIs needed by management.

Customization & Integration

Any custom features or third-party integrations required.

Master Data – HR & Payroll

Required only if HR / Payroll module is in scope.

Employee Master Data

1	Employee Name, Code & Department
2	Designation / Job Position
3	Date of Joining
4	PAN Number & Aadhaar Number
5	Bank Account Details (for salary)
6	PF Number & ESI Number (if applicable)
7	Professional Tax Slab

Payroll & Attendance Configuration

Salary Structure (CTC Breakup)	Allowances (HRA, TA, DA, Special Allowance)
Deductions (PF, ESI, PT, TDS)	Leave Policy (Casual, Sick, Earned Leave)
Attendance Rules & Shift Timings	Loan & Advance Details (if any)
Payroll Period (Monthly / Weekly)	

i Salary structures must be finalized and approved by HR before configuration. Any changes post go-live may require manual adjustments.

Master Data — CRM

Required only if CRM module is in scope.

Pipeline & Lead Configuration

01

Lead Sources (Website, Phone, Email, Referral, etc.)

02

Sales Pipeline Stages (New → Qualified → Proposal → Won/Lost)

03

Lost Reasons

04

Lead Scoring Criteria

05

Expected Revenue Ranges

CRM Master Data

Sales Team Names & Members

Salesperson Targets / Quotas

Activity Types (Call, Email, Meeting, Demo)

Customer Tags & Segments

Email Templates for Follow-ups

CRM Dashboard KPIs Required

- ✔ A well-defined pipeline with clear stage definitions ensures accurate sales forecasting from Day 1 in Odoo CRM.

Phase 3

Testing & Training

2

Weeks (Week 5)

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UAT & User Training

Configure technical integrations, conduct user acceptance testing, and deliver department-wise training with SOPs and user manuals.



Technical Requirements & Training

Technical Setup Requirements



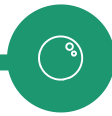
Domain Name

Custom domain for your Odoo instance URL.



Email Server

SMTP/IMAP configuration for outgoing and incoming emails.



WhatsApp API

API credentials for WhatsApp integration.



Payment Gateway

Credentials for online payment gateway integration.



Barcode & Printer

Barcode scanner setup and printer configuration details.

Training Requirements

1 Department-wise Training Schedule

Planned training sessions for each department with dates and trainers.

2 SOP Documents

Standard Operating Procedures for all key business processes in Odoo.

3 User Manuals

Module-specific user guides for end users and administrators.




4 Test Scenarios

Defined UAT test cases covering all critical workflows.

Document Formats & Historical Data Migration

Required Document Standard Formats

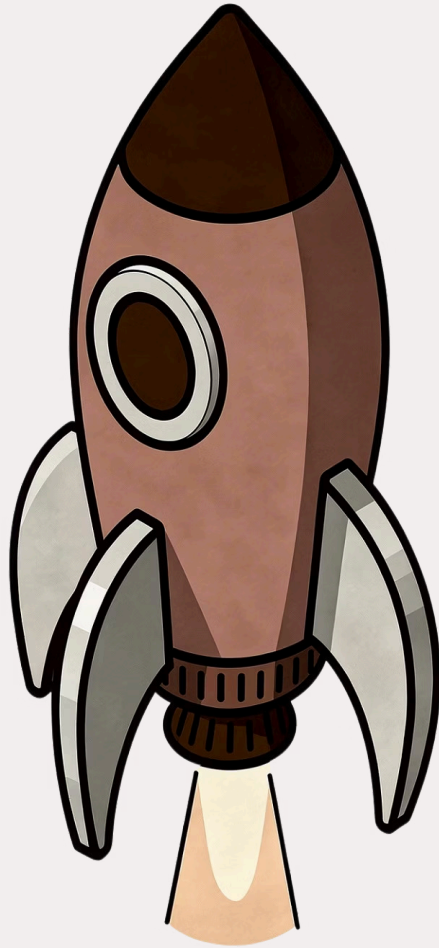
Provide sample formats for all business documents to be configured in Odoo:

-  Sales Quotation Format
-  Sales Order Format
-  Tax Invoice Format
-  Delivery Challan Format

Historical Data Migration

The following open data must be migrated to Odoo at go-live:

Data Type	Details Required
Opening Balances	All account balances as of go-live date
Open Sales Orders	Pending orders not yet invoiced
Open Purchase Orders	Pending POs not yet received/billed
Open Invoices	Unpaid customer and vendor invoices
Open Stock	Current inventory quantities by location
Employee Balances	Leave balances, loan outstanding



Phase 4

Go-Live & Handover

1

Week (Week 6)

—


Launch & Support

Final validation, data sign-off, go-live execution, and post-launch support handover to ensure a smooth transition to live operations.


Go-Live Preparation & Deliverables

The final phase ensures all systems, data, and stakeholders are ready for a successful launch.


Go-Live Checklist

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UAT Sign-Off

All user acceptance tests completed and signed off by department heads.
- 


Data Validation

Migrated data verified for accuracy and completeness.
- 

Backup Plan

Rollback strategy documented and tested in case of critical issues.
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Support Contact Matrix

Escalation contacts for technical, functional, and business issues.
- 

Go-Live Date Confirmation

Final confirmed go-live date agreed upon by all stakeholders.

Client Deliverables

The following must be submitted by the client prior to go-live:

- 01 **Signed Requirement Document**
- 02 **Master Data in Excel Format**
- 03 **Sample Document Formats**
- 04 **Statutory Credentials**
- 05 **User List with Roles**
- 06 **Final Go-Live Approval**

✔ All deliverables must be received at least 5 business days before the confirmed go-live date.

Recommended Onboarding Modules

Accounting	Sales	Purchase
Inventory	Manufacturing	CRM
Payroll		