

# V11 Release Notes

Saas16 05/2017

## Main changes/ New features saas16:

- **Service:** timesheet, revenue/cost computation, timesheet grid ux improvement, timesheet dashboard
- **Acuity scheduling:** sms integration, phone validation, online appointment
- Salary package configuration: “plan cafeteria” as employee, configure yourself your salary package based on a employer cost. Select advantages according your needs.
- **Organisation chart:** have a quick look of the position of any employees from the employee form
- **Match payment with several invoices**
- **Prevent negative invoice:** The goal is to prevent people using invoices to make credit note (problem in the naming of the document but also in the reporting, the invoice is not in the correct menu, etc.).
- **Plan next activities:** configure a next activity workflow to automatically plan todos of your department. E.g: crm, plan a call then a mail and then a meeting
- **New views:** edit kanban, instance widget in standalone.
- **packages/packaging:** the product packaging and the delivery packaging. We have created two menu entries, one for each feature and modified the views to make them more specific to the feature.

## Accounting

[account] aged reports: use max date

Improvement on the aged receivable/payable reports regarding the date that should be used to define them.

[account] Make currency rate update easier for user

Default filter to only show active currencies + replace the “view rates” button (not really visible) by a related button on the currency.

[account] rename/remove taxes action name

Rename the action menus accessible from the taxes to simplify it for users.

[account] test templates forking objects

Technical improvement for better tests.

[account]invoice-payment reconciliation

A button has been added on the payment to match this payment with several invoices easily. Previously, you have to go on each invoice to match it with the payment.

[accounting] Review taxes label for all localizations

Some taxes names were too “technical” (ex: VAT21COCONTSERV), they have been renamed (ex: VAT 21% Cocont. Serv.).

[accounting]10n\_us\_check\_printing: call to report refactoring

Technical improvement (to remove deprecated code).

### **[base] res.currency.rate as a date instead of datetime**

Previously, the currency rate was set at a specific date and time. But invoices only have a date (not a time). This was creating some issues (with the timezones for example). This won't be the case anymore.

### **[refund] Prevent negative invoices / add refunds menu**

Error message if you encode an invoice with a total amount that is negative to inform you that you have to create a refund. The goal is to prevent people using invoices to make credit note (problem in the naming of the document but also in the reporting, the invoice is not in the correct menu, etc.).

## Mail

[activity] feedback + next activity when marking an activity as done: Propose the next one

### **[activity] Recommended next activities: field to make a hierarchy and propose next activity**

[activity] rename activity action in chatter

[Discuss] Move Search fields on top of the lists on left column

[mail\_push] Private information displayed on res.partner view

[mail] In mobile: Hide "mark all read" button in inbox

[mail] remove activity smart button on partner

[mail] rename Deadline => Due Date

[mail]default access to new channels

## CRM

[crm\_score] display minimum score in Chatter

[crm] change rating label name+ tooltip

[crm] change the filter sequence and resolve 'won' stage issue

### **Acuity scheduling**

## Event

[event] add stat button to send mass mail to speaker and attendees

[event] Warning when cancelling an event

## Usability

[framework] Kanban view: Change "More" by font awesome icon

[Framework] kanban: Apply color on the kanban headers

## **[framework] web: new views**

[Generic] Graph by Default, instead of pivot in reporting menu

[GenSettings] Update on menu

## Helpdesk

[helpdesk] mailgateway / activities

## Human resources

[hr\_holidays] Manager and approvers fields cleaning

[hr] Employees home address

[hr] Org Chart

[HR] Salary Package Configurator

## Lunch

[lunch] Previous order sort by date

## MRP

[maintenance] Duration on the calendar + improve help message

Maintenances on calendars : make sure that the duration is correctly showed based on dates encoded in the maintenance request.

[mrp\_maintenance] On-boarding

General improvements on Maintenance (usability, no new features). All the info on the task.

[mrp\_mps] Master Production Schedule Menu entry

The MPS menu has been moved under the Planning Menu in MRP (not in reporting anymore).

[mrp\_plm] PLM interface finetuning

General improvements on PLM (usability, no new features). All the info on the task.

[mrp\_plm] take into account "Consumed in operation" on BoM line

If you change the fact that a component is consumed in a specific operation, this is now also recorded in the ECO.

[mrp\_quality] Quality App - improvements

Make sure the naming is consistent across the quality app and add the possibility to correct a measure that has been entered for a quality check.

[mrp\_repair] Usability Improvements

General usability improvements on repair app. More info on the tasks.

[mrp] Work Order Message description incorrect.

The empty list message for the work order messages was inexact, it has been corrected.

[mrp]Archived BOM

An archived BoM is not usable anymore on a MO (not in the dropdown anymore).

### **[Packaging] Clarify views**

The same model is used for two different features : the product packaging and the delivery packaging. We have created two menu entries, one for each feature and modified the views to make them more specific to the feature.

### **[quality\_mrp] Control points on Operations instead of WC**

The control points can now be defined on work order operations and not on work centers anymore. So if your manufactured product goes into the same work center for two different operations, you can set up two different control points.

### **[Quality] Improvements**

Correct a display issue with the work order messages in work orders.

## Note

[note] add activity widget in kanban

## PoS

[point\_of\_sale] posbox: design of the Customer-facing display

[pos] cash control : resume a session after clicking on close button

[pos] catalog menu

## Website

[portal] Remove me

[website\_portal] Hide menu and add PO + review access right

[website\_project] filter on stage in task/issues

[website\_quote] Fix issue of 'Quotation viewed by customer'

[website] remove margins of todo bar in dashboard

## Project

[project\_forecast] merge project\_forecast and project\_forecast\_grid

[project\_forecast] unleash demo data for forecast

[project] automatically add as follower if project manager & customer

[project] followers on task merge

## Sale

[refund] Prevent negative invoices / add refunds menu

[sale] channel dashboard easier to set up

[sale] favorite channels in dashboard

[sale] Notification from Quote/SO + Invoice: backend for users

[sale] sales report based on confirmation date

## Stock

### [stock] change the string of checkbox "To Refund"

When you return a product, there is a checkbox previously named "To refund". It has been renamed "To Refund (update SO/PO)". Indeed, Odoo does not create the refund but update the PO or SO and allows you to then refund it.

### [stock] Improve routes on SO lines

MTO route is now available for SO lines by default, and you are not able to quick create a route from the SO anymore.

### [stock] Remove "latest inventories and moves"

Remove an unused menu (same info accessible from the inventory adjustments).

### [stock] To Refund

Make sure that the checkbox "to refund" when sending back a good also works for POs.

### [stock] Updates in 'Settings' of Perpetual inventory valuation

Remove the settings to activate and show the settings by default on the product categories.

### [stock] Warning on SO when quantity is not available

Improve the warning message on the SO when quantities are not available. If you have several warehouses, odoo will let you know if quantities are available in another warehouse.

[product][hr] hierarchical name search

## Saas15 03/2017

## Accounting

[sale invoicing] move proforma to sale and make it a report



[accounting] Swiss Localization

New swiss localisation

Other details:

[account] "partner ledger button" usability

- on partner form: replace the button to see all the invoices made by an action that jumps on the partner ledger
  - name it "Customer Ledger" if the partner is customer=True only
  - name it "Supplier Ledger" if the partner is supplier=True only
  - name it "Partner Ledger" otherwise
  - in partner ledger, if a partner is given in the context, it should be the only one visible (do not display the other, even folded)
  - current 'invoiced' button on partner is kept as a action in 'actions' top menu

[account\_reports] centralized journal report: create a new accounting report for centralized journal (in french journal centralisateur ). In this report, we'll find the total of all journals per month

Bank statement sync: name on the line (no "false" anymore)

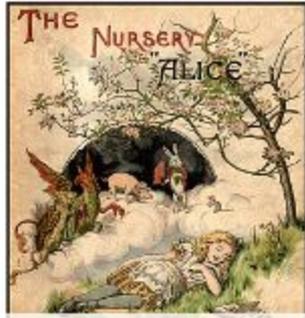
Domain on products for customer/supplier invoices

[110n\_be\_invoice\_bba] communication on Invoice report: If a communication is set, add in the report the following line :Please use the following communication for your payment : (reference in bold)

allow to set 'ask resitution' & 'ask payment' to TRUE in the belgian XML for VAT report

## Website & eCommerce

**[website\_sale] wishlist & comparison**



Alice's Adventures in Wonderland - Lewis Carroll

\$ 4.50  

[website] new dashboard + menu structure



[website] Edit company logo from frontend

## Studio

- [Studio] Improved navigation
- [Studio] New app creation - improvement
- [Studio] Drag and Drop search view
- [Studio] Related field
- [Studio] Website forms

## Event

[event] OdooDays feedback

- New settings and new category fom (bowes config)
- Integration with nex activities
- Track
  - Usability improvement (partner, contact, ...)
  - Activities management

- Kanban stages

## Mail/discuss

- 2 modes (emails or inbox)
- No more auto-read on channels
- Changes in reply to an internal note: it creates a note
- Improvement in log (look)

## Resources (technical changes)

[stock\_calendar] Clean resource inheritance (technical)

[resource] Configure default calendar

[resource] Default per-company resource calendar

[resource][hr][mrp] Technical cleaning

## MRP

[mrp] small usability improvement in mrp, quality

[mrp] source description should be visible in debug mode only

workcenter blocking time computation according to working hours

## Stock

[stock] onboarding: manage deliver and receipt 3 stockable products:

[https://docs.google.com/document/d/1y\\_DZf1aAx4vzaqp\\_K3WmJnyldvV-5JdVeS-klalmZ0Y/edit?usp=sharing](https://docs.google.com/document/d/1y_DZf1aAx4vzaqp_K3WmJnyldvV-5JdVeS-klalmZ0Y/edit?usp=sharing)

[Stock] Shipping management setting (required)

[Stock] inventory valuation default group-by

[Logistic] Rename "Reserve" to "Check availability" to avoid ambiguity

## Sale

[sale] select quotation template in tour

[Quote Template] Usability

[Website\_quote] Various improvements

1. Invisible suggested products after customer added it in order lines

<https://drive.google.com/file/d/0Bx4JWs1efCreOVZvQ0FTems4WTQ/view?usp=drivesdk>

2. Add Payment Term in online quotation template.

3. If no tax added in quotation then make it invisible in template.

<https://drive.google.com/file/d/0Bx4JWs1efCreeVd1ZzNCa25KdIU/view?usp=drivesdk>  
<https://drive.google.com/file/d/0Bw8vRpv1R7NKWThmWXpOUDRTMjg/view>

4. Set currency symbol with discounted price.

<https://drive.google.com/file/d/0Bx4JWs1efCreczM4eWhUa2gzcms/view?usp=drivesdk>

5. Set visible product's images for portal user.

<https://drive.google.com/file/d/0Bx4JWs1efCreQVh2dkU0cGxsLTQ/view?usp=drivesdk>

## Usability

### Menu

[sale] catalog menu: Products, coupons programs

[web\_enterprise] Change sequence of quick search results

no messages at module installation

## Usability

[docsaway] some improvements

**[ir\_model] Flag business models**

**[base]Rename "Partner" to "Contact"**

[mail] message\_new new API

[core] Wizards: By default cursor control on name field

**[Data] Open External links in new tab**

[web] separate personal and shared filters

[website builder] less/css editor

[settings] On mouse hover the arrow icon should become hand

Clean dependencies

[website] Simplify hypertext wizard: remove Link Label, etc

**[attachment] select more than 1 attachment in popup**

[website\_livechat] Website page tracking

[note] Improvements

[pad] Small improvement for pad settings info

[payment] remove callback\_eval

[website\_\*] Customer Portal Contact Issue

[project\_forecast] gantt view: change default group by

Ratings: Improvements

[report] imp printed docs for new styles

[web] datetime widget : split date and time

no more domains based on filters

## Settings

[event] new settings

[timesheet] new settings  
[stock] new settings  
[mass\_mail] new settings  
[project] new settings  
[attendance] new settings  
[helpdesk] new settings  
[pos] new settings  
[expense] new settings  
[mrp] new settings  
[payroll] new settings

## Wording

[purchase\_requisition]Change 'Call For Tenders' to 'Purchase agreements'  
[hr\_holidays]Distinction between Leave Request-Leave Allocation  
States vs Status: Journal entries  
[Taxes] Review taxes label  
[Accounting] add label field on register payment

# Saas14 01/2017

## Accounting

### Localisation

- **Mexican Localization**
- Reports refactoring (technical change)
- Removed Unknown Partner Ledger in action menu

## Invoicing

- Invoicing cleaning + onboarding
  - - renaming label on form view (partner and company) : TIN, vat, tax id, ...
  - - Message (hyperlink) to configure company data on ALL report (global report layout)
  - - Footer : display the current footer on settings view (the one based on phone, fax, website, ... of the company). If check 'allow custom footer', then custom footer is editable and will replace the current default one. This is applied to all report, since it touches the global report layout

- Send Invoice at the proforma state

## Taxes

- Fiscal Position improvements
- Review I10n\_in module for tax change

## Usability

- **Product menu entry**

- Stock valuation: clickable history on journal entries
- CAMT: new option in accounting setting to import bank statement
- [account][stock] Sum in list view - multi currency environment
- Base currency and account currency: If the 'Journal Currency' and Currency of Accounts Selected on Journal are different , then it should raise an error otherwise it should work for all other cases
- Fiscal Position improvements: Remove color of string "No result to show" from all many2one fields when no result found + Remove "Create and Edit" from the purchase app (fiscal position)
- Open Dropdown at respective place in Subscription , Accounting Reports => <https://drive.google.com/file/d/0B21cUNlAdZ6geW05aS0zNTM4YXc/view?usp=drivesdk>

## Studio

- [Studio] Clean technical views in backend
- [Studio] Views calendar/Gantt/Pivot/Diagram with properties
- [web\_studio] Write an app summary for the module kanban card
- [Studio] App creator & icon creator redesign
- webclient navigation in studio mode
- [Studio] When new app > go to form editor
- customize app switcher background
- drag and drop of elements in views
- Tour

## New Settings

- Accounting
- Website
- Recruitment
- Sales
- General settings

## Next activities

- Notes
- Partners
- Sales (my pipelines, quotations, sales orders, customers)
- Subscriptions
- Appraisals
- Purchases (RFQ, PO, Vendors)
- Inventory (Transfers)
- Manufacturing (MO, Unbuild orders)
- Repairs
- Accounting (Invoices, Customers, bills, vendors)
- Project (Tasks + Issues)
- Quality (ECO)
- Events (events, tracks, attendees)
- Surveys
- Recruitment (Job positions, applications)

## Sales

### Coupons

- Individual coupon
- Promotion

### eCommerce

- [website\_sale]add Street2 address field in checkout form
- [website] hidden links visible when printing from browser
- [payment] restrict per country

### Point of Sale

- [pos\_restaurant] Some usability Improvements: On deleting a table it ask the confirmation , but the dialog is too big without any content
- [pos] Receipt reprinting config improvement: usability improvements in pos config

### Usability

- [sale]: Duplicate a SO should not duplicate the down payment lines
- [Sales] improvement of addresses display in pdf report

- **New dashboard: todo management, integrated Sale/Pos/eCommerce/ebay, customizable dashboard**
- [Sale] Breadcrumb for the related Project from SO
- [Product] Clicking on the 'Sales' button gives ugly view
- [sale\_timesheet] Delivered quantity updated on locked Sales Order
- [sale] Order Date on Quotation / SO
  - - Usability Issue in Quotation List view and Sale order Report
  - - Calculation of expected deliverydate is based on Quotation date , which is wrong. (It should be based on Sale order date).
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## Discuss/mail

- **Github integration**
- [mail] remove followers at module uninstall
- **Create partners from the add followers wizard**
- [mass\_mailing]
  - **Contacts Management:** The mass mailing app already has a mechanism to handle that, but it's not useable. This task is a cleaning of the way to manage contacts and mailing lists in the mass mailing app.
  - **New themes**
- [mail][various] Remove 'New Task/..' buttons in notif emails
- [mail] Chat Window: Put option to expand in discuss
- [Discuss] new filter in menu to check messages you are directly mentioned
- Improvement in leave and forum notification
- if there is an autosubscription group, the button to unsubscribe is simply not there. Anyway, it is Advanced to configure and this kind of channel is often an "internal communication channel" so it is normal you are not able to unsubscribe at all... (it is like an internal email address)
- Add invited people to mention suggestions: we cannot mention someone in a channel just after inviting him ; we need to reload the page before

## Usability

### Menu changes

- Attendances
- Quality
- Warehouse: hide create in warehouse but show menu
- Terminology: "Reports" became "Reporting" because of the confusion with "Expenses Reports"
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### Access rights

- [Apps] update in no\_one group
- Product creation group

- [hr\_payroll] Payroll access rules
- security token on unsubscription url

## Form/tree/widget/kanban

- [widget] Domain Selector and Field Selector: e.g. in mass mailing
- [hr] missing a list view for department in employee app
- [modal] uniformize buttons
- [calendar] highlight meeting when coming from an opp or a partner
- "Archived" button
  - the last one in the stat button bar.
  - Rename Unarchived into "Restore".
- [HR]Main App should have some descriptions
- More contrast in m2o font
- [website\_live\_chat]change link color for better visibility
- Search on kanban state clearer: red green grey -> easier to define custom policy
- [lunch] new widget (tech)
- Address: allow to add fields in address block
- Search in partner by its vat number
- [MRP] Make history clickable
- Pads: fullscreen icon
- [kanban] remove the 40/ in kanban columns tooltips
- [Generic] Remove tooltips on tags (in form view)
- [Product] Remove tooltip from 'product' filter
- [Stock] Tooltips on procurement rules
- Remove "Leave Meetings" From leaves Action button:
  - [https://drive.google.com/file/d/0B2eqsAe\\_ZQpddXNPWFEdXhxdFU/view?usp=drivesdk](https://drive.google.com/file/d/0B2eqsAe_ZQpddXNPWFEdXhxdFU/view?usp=drivesdk)
- Meeting highlighted when coming from stat button (for instance: from an opp)
- Calendar widget: Remove 'Create and Edit' shown here: <https://goo.gl/YiaWnN>
- pivot: Filter tree under reporting: don't see a value if you have already grouped by this value

## Typos

- [Chat]Change display name of "Website Live Chat" module with "Live Chat"
- [all] Fix common typos, batch 1
- [Product] Rename 'Components' to 'BoM Components'
- [base] Rename technical users:
  - Default User => Default User Template
  - Teemplate User => Portal User Template
- Consistency: Standard Cost: terminology

## Partner form

- New stat button:
  - Stat button "Tasks" & "Issues" on a partner form
  - Attendee (events)
- Logo management, clearbit integration

## Planner

- Expense
- Restricted to admin user
- Website sale

## CRM

- "Default Sales Team" and "Default Salesperson" on lead created from "contact\_us" form
- [crm][livechat] create lead from livechat
- [CRM] Cleaning
- [CRM] Archived opportunities in conversion wizard (lead -> opp)
- New "website" field in lead form
- Opp pivot view show "lost" opp (archived)
- [CRM] Sales person/Sales Team onchange

## Helpdesk

- Add CC recipient to followers
- Display Customer name by default in Kanban views of Helpdesk tickets
- tour + test

## MRP

- [Product] Manufacturing lead time
- [Expiry\_Date] 'Product Alert Time' improvement
- [Quality]Quality Usability

## Portal

- [portal\_sale] move remaining code and delete module
- [website\_portal\_sale] portal invoices mobile preview
- [forum] mess for portal user
- [website\_sale\_stock] Don't show internal picking in customer portal

## Technical

- Removed old subscription module
- Removed workflow engine
- [timesheet] remove dependency with invoicing
- [web] Remove key is\_admin from session\_info
- xml namespaces handling in qweb 1 2 3 4
- [web\_editor] remove the rpc loading the translations
- [various] remove ir.needaction mixin code
- Server actions

## Product

- [product] Attribute readonly on variant page
- [product] use the sequence field on the product.attribute.value
- version and document management for products [Enterprise]

## Support

- [web\_enterprise] Change mailto link to help@odoo.com to [www.odoo.com/help](http://www.odoo.com/help)
- [web] help users to report tracebacks
- [core] Improve logger message (sql\_db.py): reason given in server fail

## Reports

- New templates: corporate design
- PDF Report name improved

## Mobile

- eCommerce checkout improvement for mobile
- [mobile] firebase cloud messaging shouldn't be in apps

## Project

- Able to merge 2 tasks
- Removed useless reports
- Improvement in subtask management flow

## Delivery

- Removed Tamendo: not used and integraion with easypost is planned
- Fedex Saturday delivery

## Website

- [website\_\*] frontend: filter and sorting

## Event

- [website\_event] Bottom pager
- [website\_event] Calendar ==> website localization time format

## Forum

- [Forum]move comment link in forum
- [website\_forum] change profile picture for forum users

## Import

- [import] improvements for relation fields
- [Generic]Ask user to confirm when removing export template (ir.exports & ir.exports.line)
- [export] Mouse hover on fields display technical name of field

## Warehouse

- [stock] Should not change lot product if related quants: Add a bootstrap message to warn the user why he cannot change the SN otherwise it sound like a bug
- [stock] Inventory Valuation: Merge menus (inventory at date and inventory valuation) as people who want an inventory valuation at date and they don't know what to do
- [Inventory] Some usability improvement when scraping a product:  
<https://drive.google.com/file/d/0B21cUNiAdZ6gY004b25IVXNzMWc/view?usp=drivesdk> make Scrap location required.
- [stock] handle widget on proc rules
- [Product\_Category]Make some fields invisible on 'view' type:  
[https://drive.google.com/file/d/0B4WH\\_2RDzNkHcHlrSGZONWIYZXc/view?pref=2&pli=1](https://drive.google.com/file/d/0B4WH_2RDzNkHcHlrSGZONWIYZXc/view?pref=2&pli=1)
- [mrp, purchase, stock] Write tests for default lead times
- [Inventory] Chatter on lot/sn form
- [Inventory] Product: Improve Notes Tab
- [wms] Package Transfer should only display the ones related to the picking