
odoo-dev Documentation

Release latest

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Contents

1	Sökrutan	3
1.1	Fritextsökning	7
1.2	Filter	10
1.3	Gruppera	15
2	Vyer	21
2.1	Vyer deklarerar i XML	21
2.2	Kanban	22
2.3	Trädvy (lista)	27
2.4	Söktyper	28
2.5	Kalender	28
2.6	Söktyper	29
2.7	Pivot	29
2.8	Diagram	30
2.9	Formulär	31
2.10	Aktiviteter	34
3	Chatter	39
4	Aktivitet	41
5	Meny	43
6	Grafiska element (widgets)	45
6.1	Grafiska element för användning i formulär och trädvyer	45
6.2	Kanban Widgets	48
6.3	List Widgets	49
6.4	Pivot Widgets	50
6.5	Calendar Widgets	50
6.6	Field Widgets	50
7	Datakatalog	53
8	Geany EDI	55

Your Topic Title

Subsequent indented lines comprise the body of the topic, and are interpreted as body elements.

Sidebar Title

Optional Sidebar Subtitle

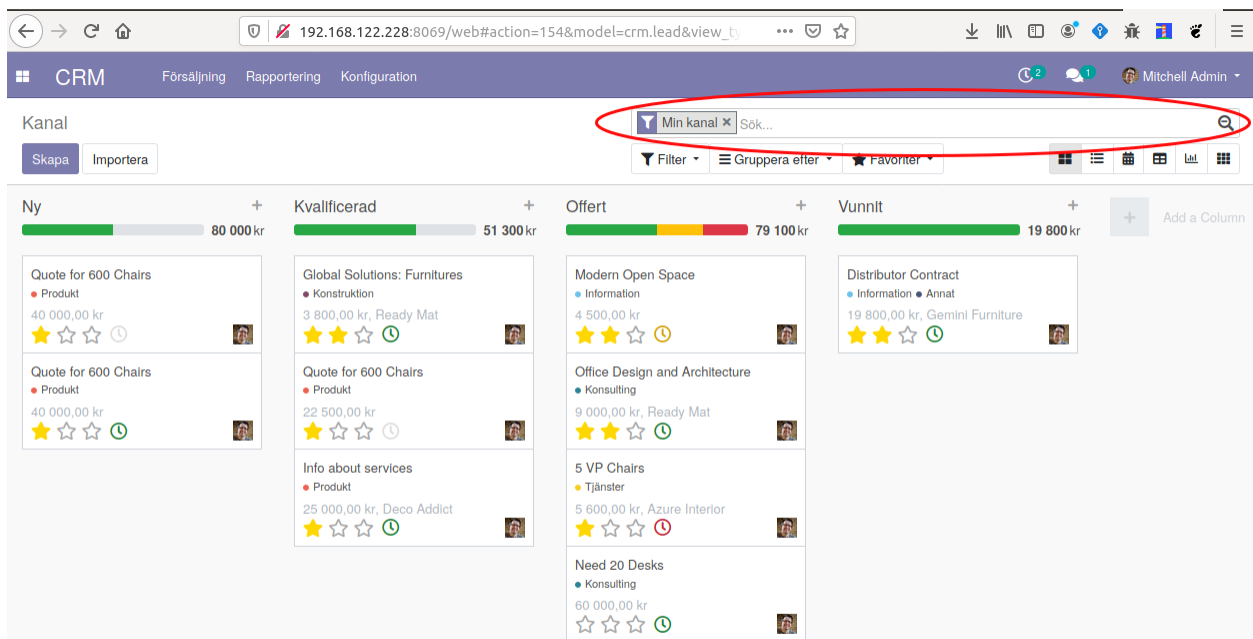
Subsequent indented lines comprise the body of the sidebar, and are interpreted as body elements.

Ett utbildningsmaterial för Odoo 12.

CHAPTER 1

Sökrutan

- Etiketter för gjorda val (filter/gruppering/favorit)
- Använd förstöringsglaset för att se extra funktioner



kod för sökrutan:

```
<search string="Search Opportunities">
  <field name="name" string="Opportunity" filter_domain="['|', '|', '|', (
    'partner_id', 'ilike', self), ('partner_name', 'ilike', self), ('email_from', 'ilike',
    self), ('name', 'ilike', self)]"/>
```

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```

    <field name="tag_ids" string="Tag" filter_domain="[('tag_ids', 'ilike
    ↪', self)]"/>
    <field name="stage_id" domain="[]"/>
    <field name="user_id"/>
    <field name="team_id"/>
    <field name="partner_id" operator="child_of" string="Customer"/>
    <field name="city"/>
    <field name="country_id"/>
    <field name="activity_type_id"/>
    <field name="activity_summary"/>
    <field name="probability"/>
    <field name="lost_reason"/>
    <field name="date_conversion"/>
    <separator/>
    <filter string="My Pipeline" name="assigned_to_me" domain="[('user_id
    ↪', '=', uid)]" help="Opportunities that are assigned to me"/>
    <filter string="Unassigned" name="unassigned" domain="[('user_id', '=',
    ↪ False)]" help="No salesperson"/>
    <filter string="Open Opportunities" name="open_opportunities" domain=
    ↪"[('probability', '<', 100), ('type', '=', 'opportunity')]" help="Open
    ↪Opportunities"/>
    <separator/>
    <filter string="Unread Messages" name="message_needaction" domain="[('
    ↪message_needaction', '=', True)]"/>
    <separator/>
    <filter string="Overdue Opportunities" name="overdue_opp" domain="[('
    ↪'date_deadline', '<', context_today().strftime('%Y-%m-%d')), ('date_closed', '=',
    ↪ False)]" help="Opportunities with a date of Expected Closing which is in the past"/
    ↪>
    <filter string="Creation Date" name="creation_date" date="create_date
    ↪"/>
    <filter string="Expected Closing" name="close_this_month" date="date_
    ↪deadline"/>
    <filter string="Closed Date" name="close_date" date="date_closed"/>
    <separator/>
    <filter string="Won" name="won" domain="[('&', ('active', '=',
    ↪True), ('stage_id.probability', '=', 100)]"/>
    <filter string="Lost" name="lost" domain="[('&', ('active', '=',
    ↪False), ('probability', '=', 0)]"/>
    <separator/>
    <filter string="Activities Todo" name="activities_my" domain="[('
    ↪'activity_ids.user_id', '=', uid)]"/>
    <separator/>
    <filter string="Late Activities" name="activities_overdue" domain="[('
    ↪'activity_ids.date_deadline', '<', context_today().strftime('%Y-%m-%d'))]" help=
    ↪"Show all opportunities for which the next action date is before today"/>
    <filter string="Today Activities" name="activities_today" domain="[('
    ↪'activity_ids.date_deadline', '=', context_today().strftime('%Y-%m-%d'))]" />
    <filter string="Future Activities" name="activities_upcoming_all"
    ↪domain="[('activity_ids.date_deadline', '>', context_today().strftime('%Y-%m-%d
    ↪'))]" />
    <group expand="0" string="Group By" colspan="16">
    <filter string="Salesperson" name="salesperson" context="{ 'group_
    ↪by': 'user_id' }"/>
    <filter string="Sales Team" name="saleschannel" context="{ 'group_
    ↪by': 'team_id' }"/>
    <filter name="stage" string="Stage" context="{ 'group_by': 'stage_id
    ↪' }"/>

```

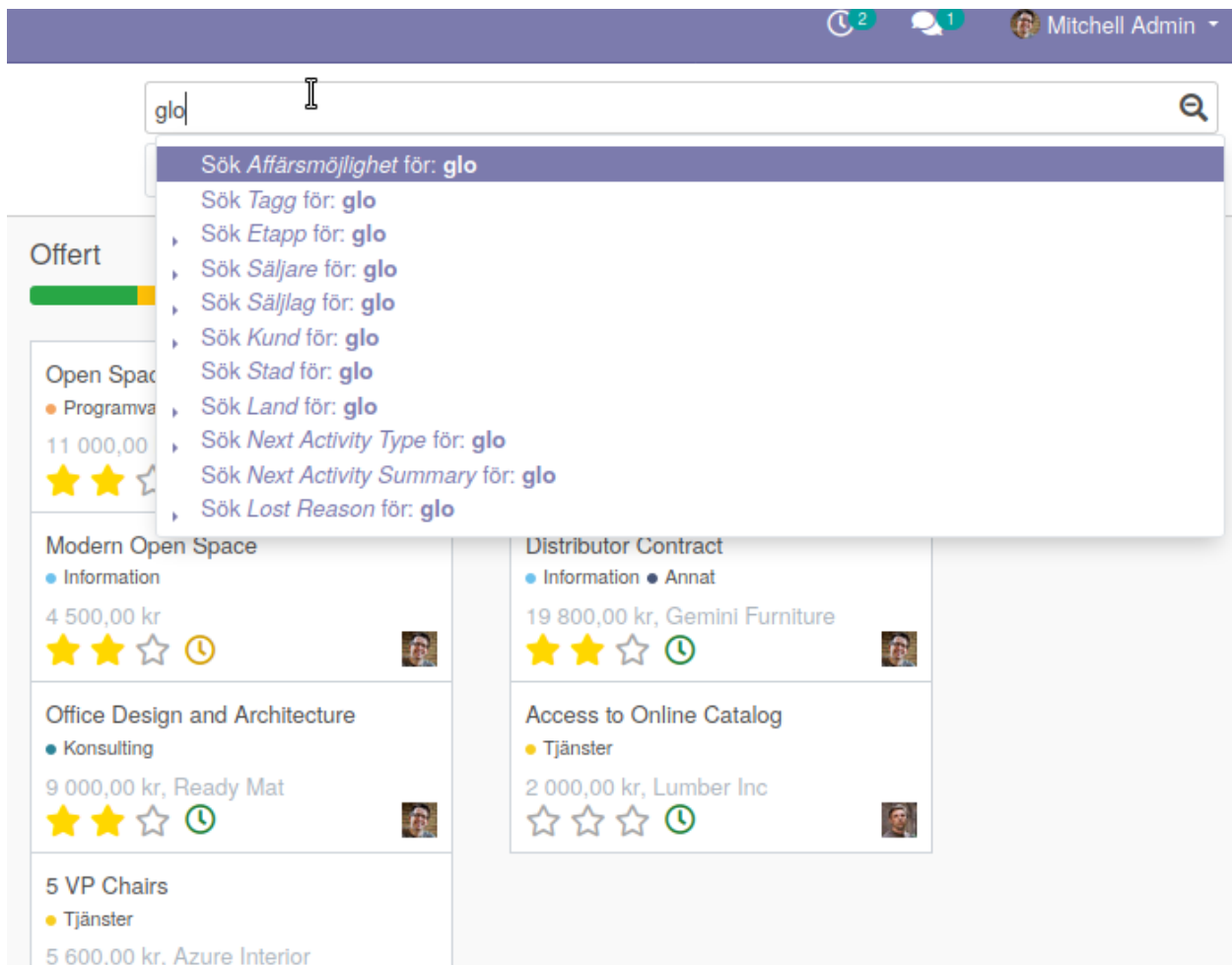
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```

        <filter name="city" string="City" context="{ 'group_by': 'city' }"/>
        <filter string="Country" name="country" context="{ 'group_by':
↪ 'country_id' }"/>
        <filter string="Lost Reason" name="lostreason" context="{ 'group_by
↪ ': 'lost_reason' }"/>
        <filter string="Company" name="company" context="{ 'group_by':
↪ 'company_id' }" groups="base.group_multi_company"/>
        <filter string="Campaign" name="campaign" domain="[]" context="{
↪ 'group_by': 'campaign_id' }"/>
        <filter string="Medium" name="medium" domain="[]" context="{
↪ 'group_by': 'medium_id' }"/>
        <filter string="Source" name="source" domain="[]" context="{
↪ 'group_by': 'source_id' }"/>
        <separator orientation="vertical"/>
        <filter string="Creation Date" context="{ 'group_by': 'create_
↪ date:month' }" name="month"/>
        <filter string="Conversion Date" name="date_conversion" context="{
↪ 'group_by': 'date_conversion' }" groups="crm.group_use_lead"/>
        <filter string="Closed Date" name="date_closed" context="{ 'group_
↪ by': 'date_closed' }"/>
        <filter string="Expected Closing Date" name="date_deadline"
↪ context="{ 'group_by': 'date_deadline' }"/>
        </group>
    </search>

```



Första field name är standardsökningen:

```
<field name="name" string="Opportunity"
  filter_domain="['|', '|', '|',
    ('partner_id', 'ilike', self),
    ('partner_name', 'ilike', self), ('email_from', 'ilike', self),
    ('name', 'ilike', self)]"/>
```

Övriga field name är:

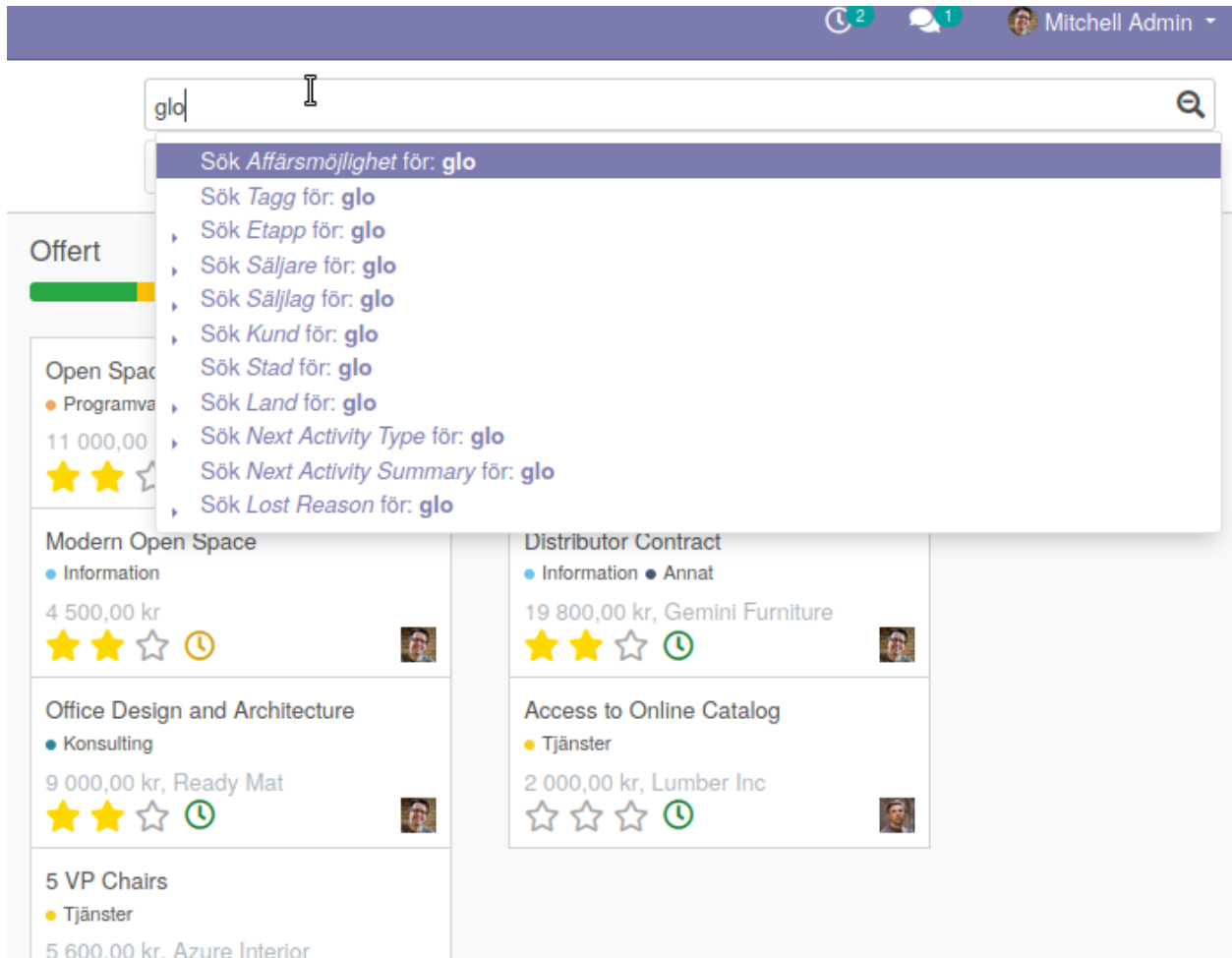
```
<field name="tag_ids" string="Tag" filter_domain="(['tag_ids', 'ilike', self)]"/>
<field name="stage_id" domain="[]"/>
<field name="user_id"/>
<field name="team_id"/>
<field name="partner_id" operator="child_of" string="Customer"/>
<field name="city"/>
<field name="country_id"/>
<field name="activity_type_id"/>
<field name="activity_summary"/>
<field name="probability"/>
<field name="lost_reason"/>
<field name="date_conversion"/>
<separator/>
```

1.1 Fritextsökning

- Standardsökning

Skapa en domän med attribut som skall ingå i “fritextsökningen”

Note: Domän byggs upp av en lista med tupler/villkor som kan förekomma i en WHERE-Clause i SQL. Villkoret beskrivs som tre element: attribut, xxx, variabel. Exempelvis ('partner_id','ilike',self). Framför listan beskrivs förhållandet mellan villkoren (OR “|” AND “&”)



Första field name är standardsökningen:

```
<field name="name" string="Opportunity"
  filter_domain="['|', '|', '|',
    ('partner_id', 'ilike', self),
    ('partner_name', 'ilike', self), ('email_from', 'ilike', self),
    ('name', 'ilike', self)]"/>
```

Övriga field name är:: <field name="tag_ids" string="Tag" filter_domain="[(('tag_ids', 'ilike', self)]"/> <field name="stage_id" domain="[]"/> <field name="user_id"/> <field name="team_id"/> <field name="partner_id" operator="child_of" string="Customer"/> <field name="city"/> <field name="country_id"/> <field name="activity_type_id"/> <field name="activity_summary"/> <field name="probability"/> <field

```
name="lost_reason"/> <field name="date_conversion"/> <separator/>
```

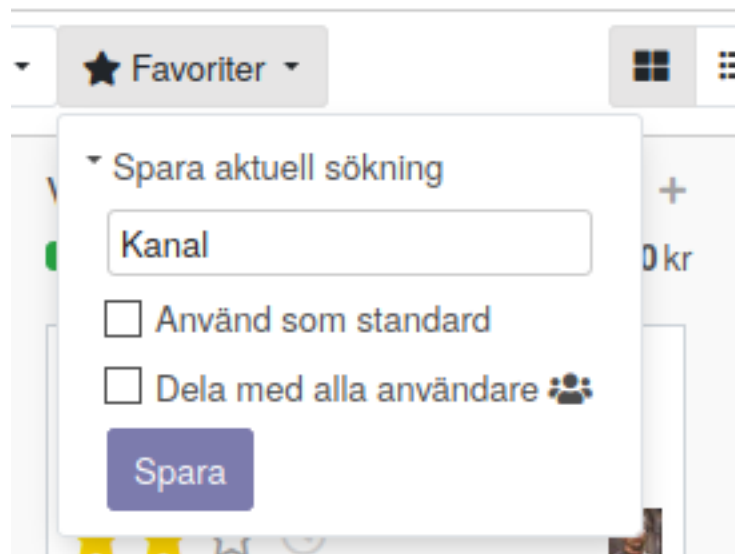
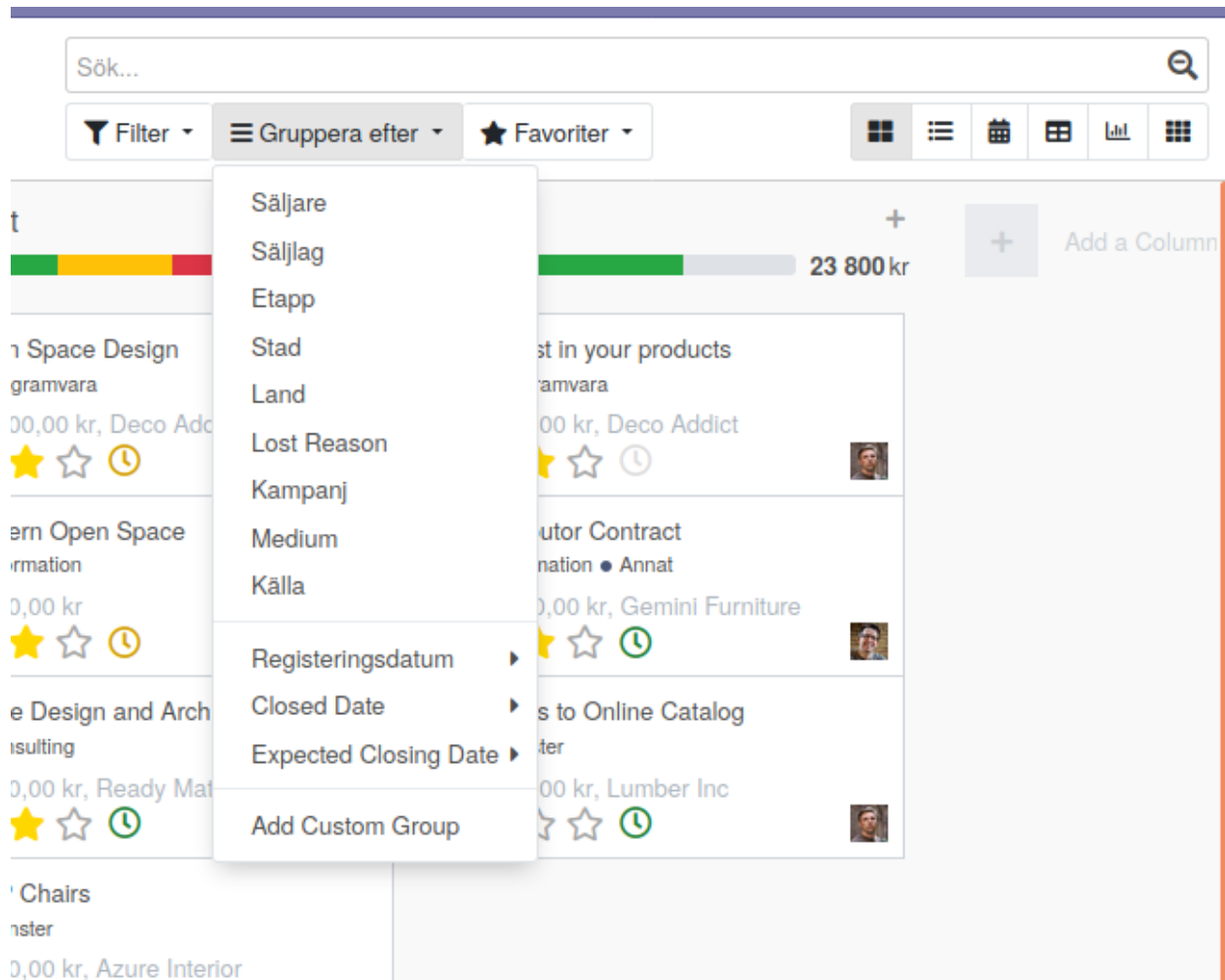
The screenshot displays the Odoo CRM interface. At the top, there is a search bar labeled "Sök..." with a magnifying glass icon. Below it, a navigation bar includes a "Filter" dropdown, a "Gruppera efter" (Group by) dropdown, and a "Favoriter" (Favorites) dropdown. To the right of these are several icons for different views: Kanban, List, Calendar, Gantt, Pie Chart, and Bar Chart.

A filter menu is open on the left side, showing the following options: "Min kanal", "Ej tilldelade", "Open Opportunities", "Olästa meddelanden", "Overdue Opportunities", "Registreringsdatum", "Förväntat avslut", "Closed Date", "Vunnit", "Förlorade", "Activities Todo", "Late Activities", "Today Activities", "Future Activities", and "Anpassat filter".

The main content area shows a list of opportunities under the heading "Vunnit" (Won). A progress bar indicates a total value of "23 800 kr". The list includes three items:

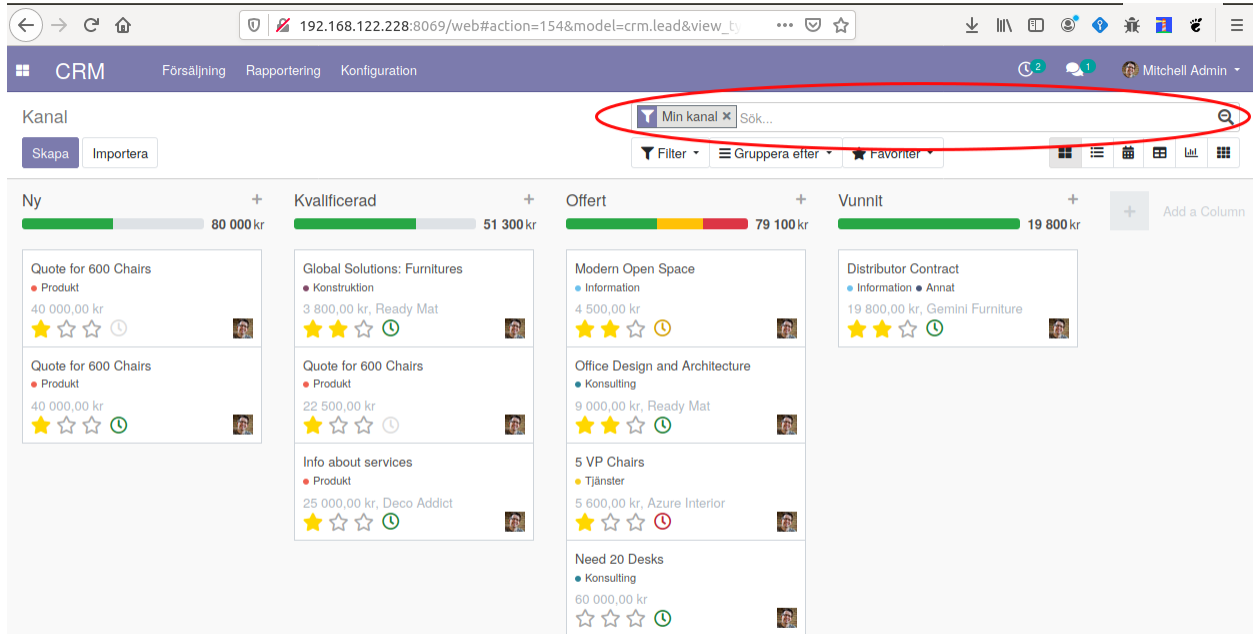
- Interest in your products**: Programvara, 2 000,00 kr, Deco Addict. Rating: 2 stars, 1 clock icon.
- Distributor Contract**: Information, 19 800,00 kr, Gemini Furniture. Rating: 2 stars, 1 clock icon.
- Access to Online Catalog**: Tjänster, 2 000,00 kr, Lumber Inc. Rating: 1 star, 1 clock icon.

Each item in the list has a small profile picture of a person next to it.



1.2 Filter

- Etiketter för gjorda val (filter/gruppering/favorit)
- Använd förstoringsglaset för att se extra funktioner



kod för sökrutan:

```
<search string="Search Opportunities">
  <field name="name" string="Opportunity" filter_domain="['|', '|', '|', (
↪ 'partner_id', 'ilike', self), ('partner_name', 'ilike', self), ('email_from', 'ilike',
↪ self), ('name', 'ilike', self)]"/>
  <field name="tag_ids" string="Tag" filter_domain="(['tag_ids', 'ilike
↪ ', self)]"/>
  <field name="stage_id" domain="[]"/>
  <field name="user_id"/>
  <field name="team_id"/>
  <field name="partner_id" operator="child_of" string="Customer"/>
  <field name="city"/>
  <field name="country_id"/>
  <field name="activity_type_id"/>
  <field name="activity_summary"/>
  <field name="probability"/>
  <field name="lost_reason"/>
  <field name="date_conversion"/>
  <separator/>
  <filter string="My Pipeline" name="assigned_to_me" domain="(['user_id
↪ ', '=', uid)]" help="Opportunities that are assigned to me"/>
  <filter string="Unassigned" name="unassigned" domain="(['user_id', '=',
↪ False)]" help="No salesperson"/>
  <filter string="Open Opportunities" name="open_opportunities" domain=
↪ "(['probability', '<', 100), ('type', '=', 'opportunity')]" help="Open
↪ Opportunities"/>
```

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```

        <separator/>
        <filter string="Unread Messages" name="message_needaction" domain="[(
↪ 'message_needaction', '=', True)]"/>
        <separator/>
        <filter string="Overdue Opportunities" name="overdue_opp" domain="[(
↪ 'date_deadline', '&lt;', context_today().strftime('%Y-%m-%d')), ('date_closed', '=',
↪ False)]" help="Opportunities with a date of Expected Closing which is in the past"/
↪ >
        <filter string="Creation Date" name="creation_date" date="create_date
↪ "/>
        <filter string="Expected Closing" name="close_this_month" date="date_
↪ deadline"/>
        <filter string="Closed Date" name="close_date" date="date_closed"/>
        <separator/>
        <filter string="Won" name="won" domain="['&amp;', ('active', '=',
↪ True), ('stage_id.probability', '=', 100)]"/>
        <filter string="Lost" name="lost" domain="['&amp;', ('active', '=',
↪ False), ('probability', '=', 0)]"/>
        <separator/>
        <filter string="Activities Todo" name="activities_my" domain="[(
↪ 'activity_ids.user_id', '=', uid)]"/>
        <separator/>
        <filter string="Late Activities" name="activities_overdue" domain="[(
↪ 'activity_ids.date_deadline', '&lt;', context_today().strftime('%Y-%m-%d'))]" help=
↪ "Show all opportunities for which the next action date is before today"/>
        <filter string="Today Activities" name="activities_today" domain="[(
↪ 'activity_ids.date_deadline', '=', context_today().strftime('%Y-%m-%d'))]">
        <filter string="Future Activities" name="activities_upcoming_all"
↪ domain="[( 'activity_ids.date_deadline', '&gt;', context_today().strftime('%Y-%m-%d
↪ '))
        ]"/>
        <group expand="0" string="Group By" colspan="16">
        <filter string="Salesperson" name="salesperson" context="{ 'group_
↪ by': 'user_id' }"/>
        <filter string="Sales Team" name="saleschannel" context="{ 'group_
↪ by': 'team_id' }"/>
        <filter name="stage" string="Stage" context="{ 'group_by': 'stage_id
↪ ' }"/>
        <filter name="city" string="City" context="{ 'group_by': 'city' }"/>
        <filter string="Country" name="country" context="{ 'group_by':
↪ 'country_id' }"/>
        <filter string="Lost Reason" name="lostreason" context="{ 'group_by
↪ ': 'lost_reason' }"/>
        <filter string="Company" name="company" context="{ 'group_by':
↪ 'company_id' }" groups="base.group_multi_company"/>
        <filter string="Campaign" name="campaign" domain="[]" context="{
↪ 'group_by': 'campaign_id' }"/>
        <filter string="Medium" name="medium" domain="[]" context="{
↪ 'group_by': 'medium_id' }"/>
        <filter string="Source" name="source" domain="[]" context="{
↪ 'group_by': 'source_id' }"/>
        <separator orientation="vertical"/>
        <filter string="Creation Date" context="{ 'group_by': 'create_
↪ date:month' }" name="month"/>
        <filter string="Conversion Date" name="date_conversion" context="{
↪ 'group_by': 'date_conversion' }" groups="crm.group_use_lead"/>
        <filter string="Closed Date" name="date_closed" context="{ 'group_
↪ by': 'date_closed' }"/>

```

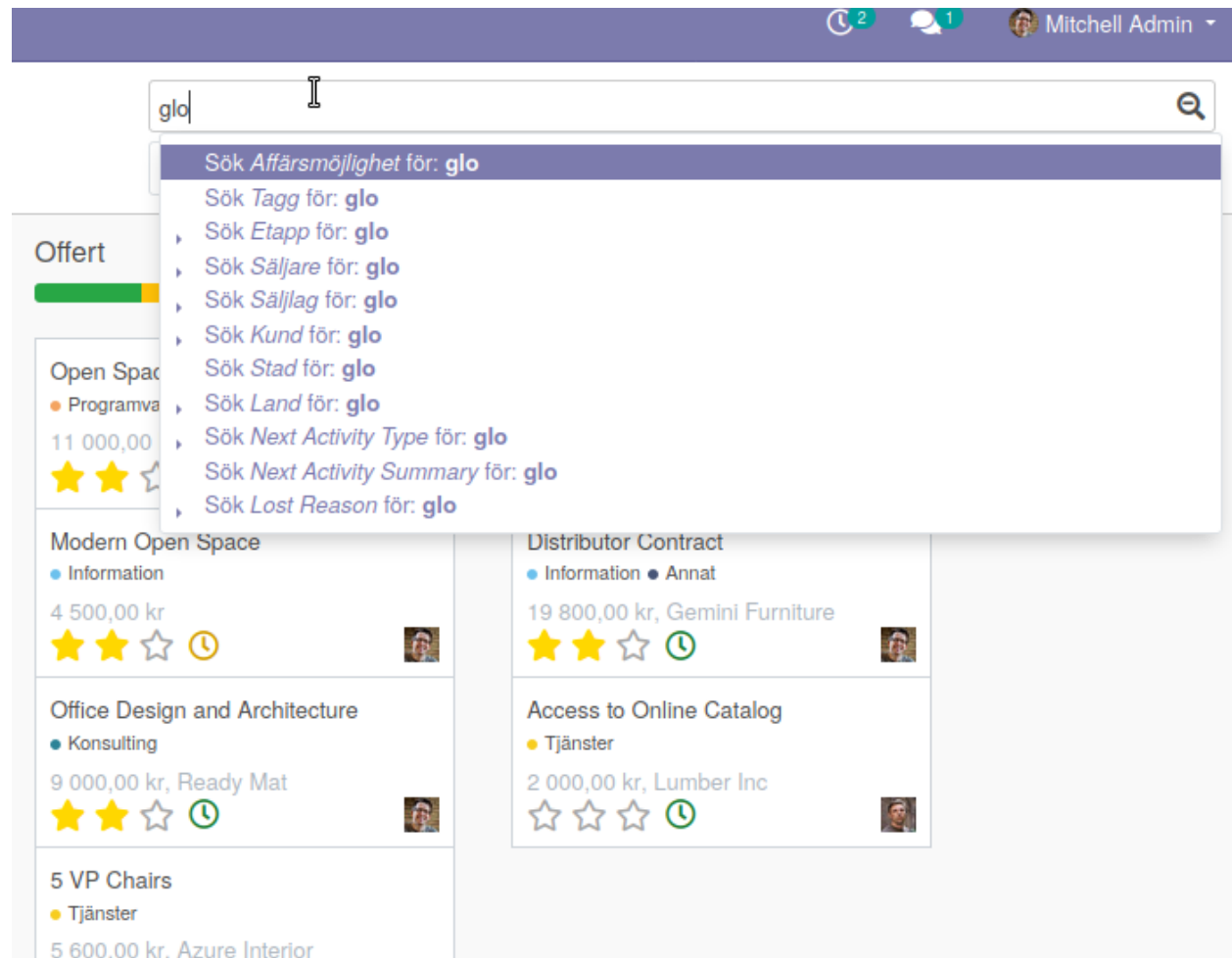
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```

        <filter string="Expected Closing Date" name="date_deadline">
      →context="{ 'group_by': 'date_deadline' }"/>
        </group>
      </search>

```



Första field name är standardsökningen:

```

<field name="name" string="Opportunity"
  filter_domain="[('partner_id', 'ilike', self),
    ('partner_name', 'ilike', self), ('email_from', 'ilike', self),
    ('name', 'ilike', self)]"/>

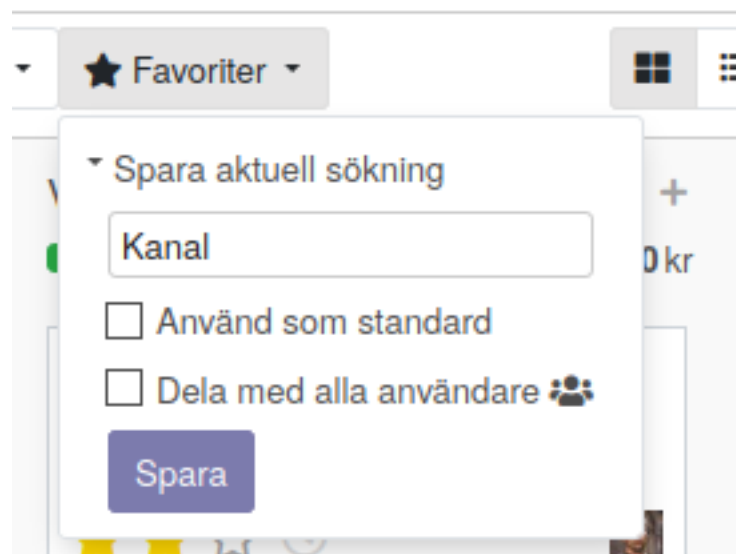
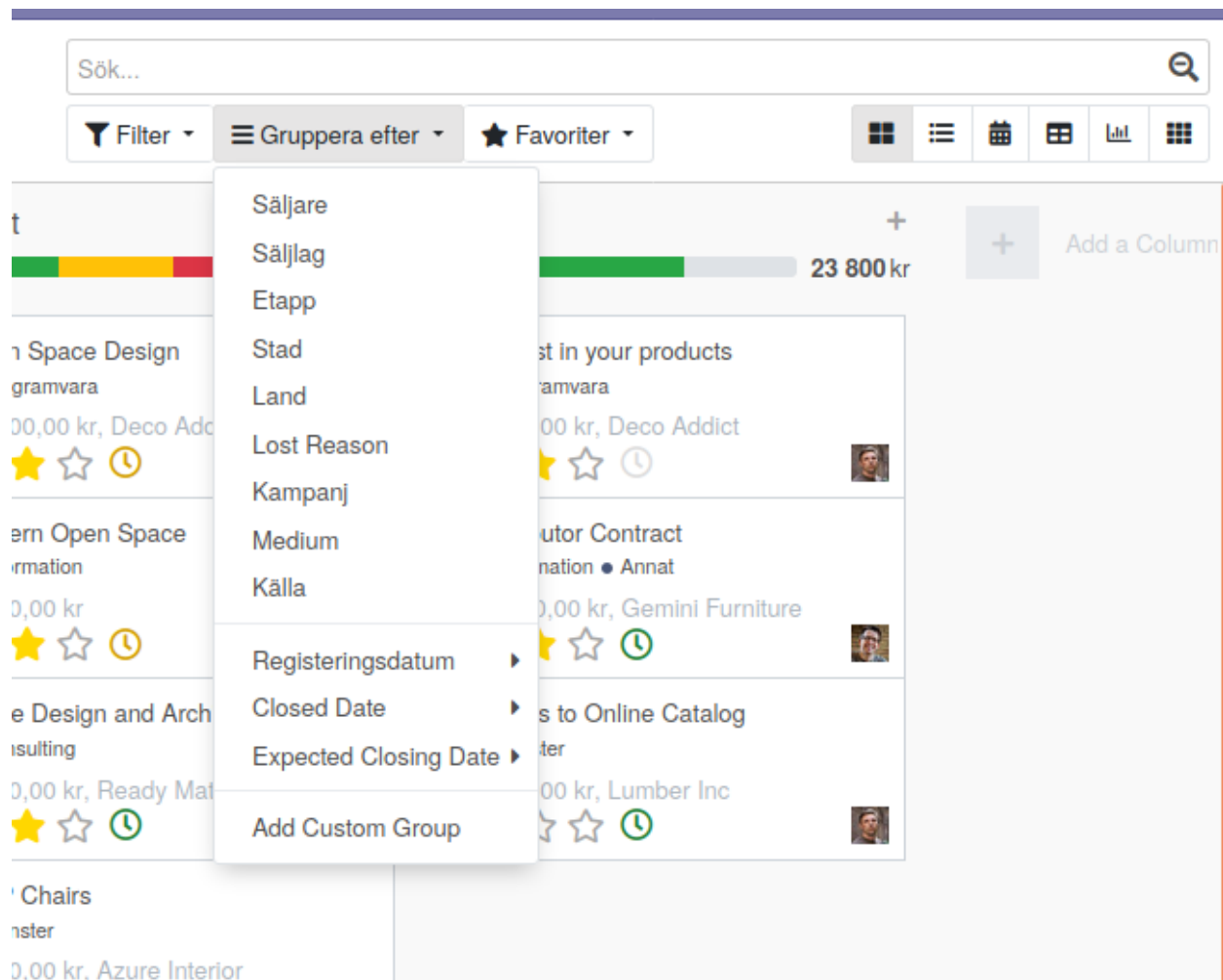
```

Övriga field name är:: <field name="tag_ids" string="Tag" filter_domain="[('tag_ids', 'ilike', self)]"/> <field name="stage_id" domain="[]" /> <field name="user_id" /> <field name="team_id" /> <field name="partner_id" operator="child_of" string="Customer" /> <field name="city" /> <field name="country_id" /> <field name="activity_type_id" /> <field name="activity_summary" /> <field name="probability" /> <field name="lost_reason" /> <field name="date_conversion" /> <separator />

The screenshot displays the Odoo CRM interface. At the top, there is a search bar labeled 'Sök...' and a toolbar with buttons for 'Filter', 'Gruppera efter', and 'Favoriter'. Below the toolbar, a filter menu is open, listing various filters such as 'Min kanal', 'Ej tilldelade', 'Open Opportunities', 'Olästa meddelanden', 'Overdue Opportunities', 'Registreringsdatum', 'Förväntat avslut', 'Closed Date', 'Vunnit', 'Förlorade', 'Activities Todo', 'Late Activities', 'Today Activities', 'Future Activities', and 'Anpassat filter'. The main area shows a Kanban board for the 'Vunnit' (Won) stage. The board has a green progress bar and a total value of '23 800 kr'. Below the progress bar, there are three cards representing different opportunities:

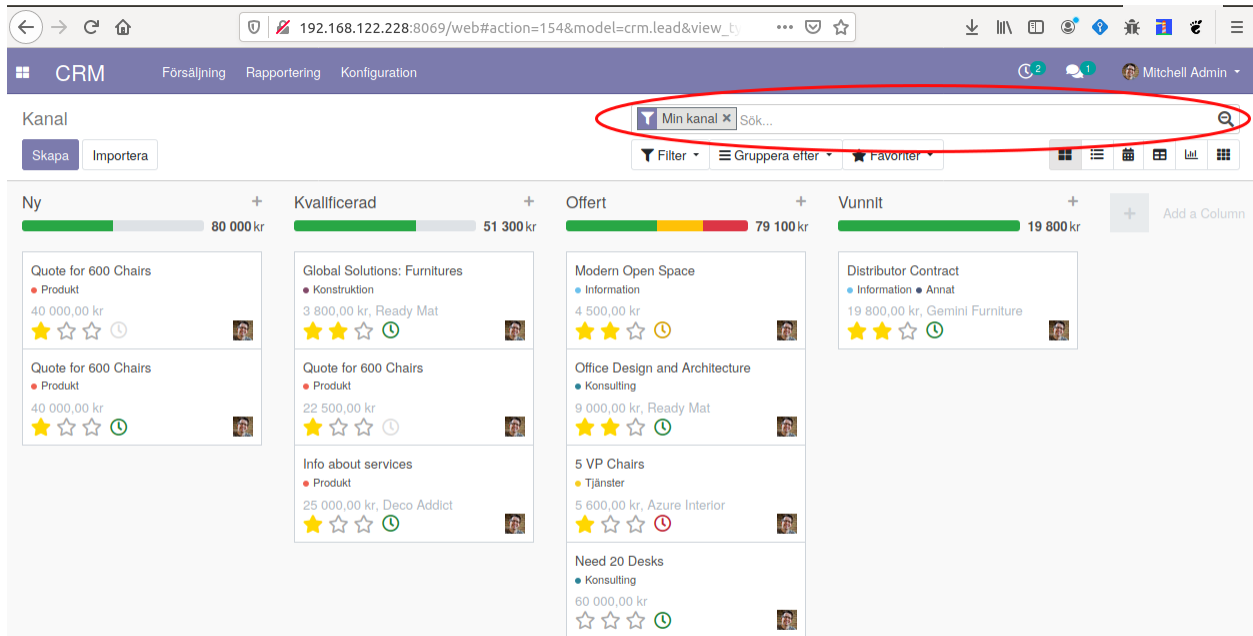
- Interest in your products**
 - Programvara
 - 2 000,00 kr, Deco Addict
 - Rating: 2 stars (2 yellow, 1 grey), with a clock icon.
- Distributor Contract**
 - Information • Annat
 - 19 800,00 kr, Gemini Furniture
 - Rating: 2 stars (2 yellow, 1 grey), with a clock icon.
- Access to Online Catalog**
 - Tjänster
 - 2 000,00 kr, Lumber Inc
 - Rating: 3 stars (3 grey), with a clock icon.

Each card also features a small profile picture of a user.



1.3 Gruppera

- Etiketter för gjorda val (filter/gruppering/favorit)
- Använd förstöringsglaset för att se extra funktioner



kod för sökrutan:

```
<search string="Search Opportunities">
  <field name="name" string="Opportunity" filter_domain="['|','|','|', (
    ↳ 'partner_id', 'ilike', self), ('partner_name', 'ilike', self), ('email_from', 'ilike',
    ↳ self), ('name', 'ilike', self)]"/>
  <field name="tag_ids" string="Tag" filter_domain="(['tag_ids', 'ilike
    ↳ ', self)]"/>
  <field name="stage_id" domain="[]"/>
  <field name="user_id"/>
  <field name="team_id"/>
  <field name="partner_id" operator="child_of" string="Customer"/>
  <field name="city"/>
  <field name="country_id"/>
  <field name="activity_type_id"/>
  <field name="activity_summary"/>
  <field name="probability"/>
  <field name="lost_reason"/>
  <field name="date_conversion"/>
  <separator/>
  <filter string="My Pipeline" name="assigned_to_me" domain="(['user_id
    ↳ ', '=', uid)]" help="Opportunities that are assigned to me"/>
  <filter string="Unassigned" name="unassigned" domain="(['user_id', '=',
    ↳ False)]" help="No salesperson"/>
  <filter string="Open Opportunities" name="open_opportunities" domain=
    ↳ "(['probability', '<=', 100), ('type', '=', 'opportunity'])" help="Open_
    ↳ Opportunities"/>

```

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```

        <separator/>
        <filter string="Unread Messages" name="message_needaction" domain="[(
↪ 'message_needaction', '=', True)]"/>
        <separator/>
        <filter string="Overdue Opportunities" name="overdue_opp" domain="[(
↪ 'date_deadline', '<', context_today().strftime('%Y-%m-%d')), ('date_closed', '=',
↪ False)]" help="Opportunities with a date of Expected Closing which is in the past"/
↪ >
        <filter string="Creation Date" name="creation_date" date="create_date
↪ "/>
        <filter string="Expected Closing" name="close_this_month" date="date_
↪ deadline"/>
        <filter string="Closed Date" name="close_date" date="date_closed"/>
        <separator/>
        <filter string="Won" name="won" domain="['&', ('active', '=',
↪ True), ('stage_id.probability', '=', 100)]"/>
        <filter string="Lost" name="lost" domain="['&', ('active', '=',
↪ False), ('probability', '=', 0)]"/>
        <separator/>
        <filter string="Activities Todo" name="activities_my" domain="[(
↪ 'activity_ids.user_id', '=', uid)]"/>
        <separator/>
        <filter string="Late Activities" name="activities_overdue" domain="[(
↪ 'activity_ids.date_deadline', '<', context_today().strftime('%Y-%m-%d'))]" help=
↪ "Show all opportunities for which the next action date is before today"/>
        <filter string="Today Activities" name="activities_today" domain="[(
↪ 'activity_ids.date_deadline', '=', context_today().strftime('%Y-%m-%d'))]">
        <filter string="Future Activities" name="activities_upcoming_all"
↪ domain="[( 'activity_ids.date_deadline', '>', context_today().strftime('%Y-%m-%d
↪ '))
        ]"/>
        <group expand="0" string="Group By" colspan="16">
        <filter string="Salesperson" name="salesperson" context="{ 'group_
↪ by': 'user_id' }"/>
        <filter string="Sales Team" name="saleschannel" context="{ 'group_
↪ by': 'team_id' }"/>
        <filter name="stage" string="Stage" context="{ 'group_by': 'stage_id
↪ ' }"/>
        <filter name="city" string="City" context="{ 'group_by': 'city' }"/>
        <filter string="Country" name="country" context="{ 'group_by':
↪ 'country_id' }"/>
        <filter string="Lost Reason" name="lostreason" context="{ 'group_by
↪ ': 'lost_reason' }"/>
        <filter string="Company" name="company" context="{ 'group_by':
↪ 'company_id' }" groups="base.group_multi_company"/>
        <filter string="Campaign" name="campaign" domain="[]" context="{
↪ 'group_by': 'campaign_id' }"/>
        <filter string="Medium" name="medium" domain="[]" context="{
↪ 'group_by': 'medium_id' }"/>
        <filter string="Source" name="source" domain="[]" context="{
↪ 'group_by': 'source_id' }"/>
        <separator orientation="vertical"/>
        <filter string="Creation Date" context="{ 'group_by': 'create_
↪ date:month' }" name="month"/>
        <filter string="Conversion Date" name="date_conversion" context="{
↪ 'group_by': 'date_conversion' }" groups="crm.group_use_lead"/>
        <filter string="Closed Date" name="date_closed" context="{ 'group_
↪ by': 'date_closed' }"/>

```

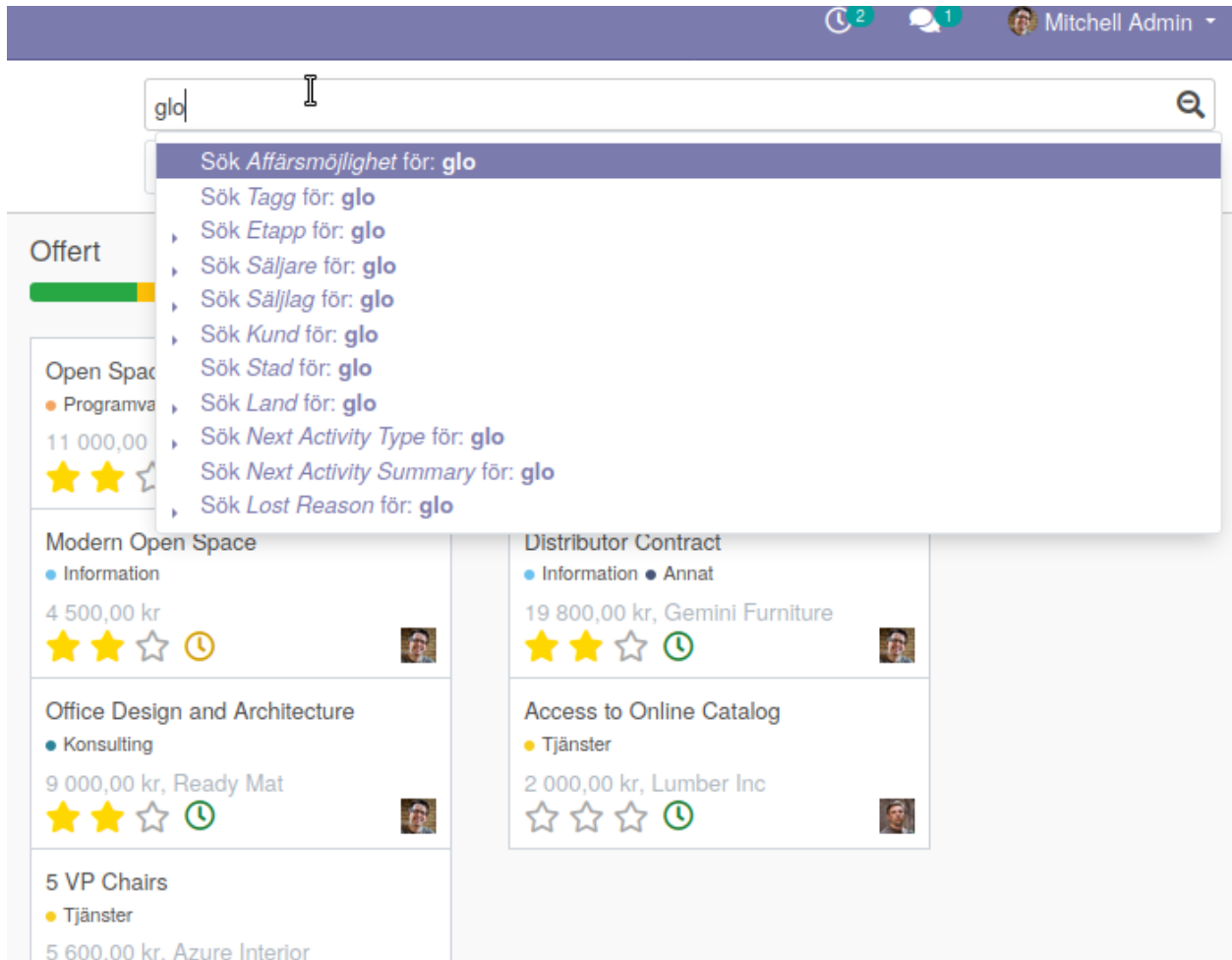
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```

        <filter string="Expected Closing Date" name="date_deadline">
      ↪context="{ 'group_by': 'date_deadline' }"/>
        </group>
    </search>

```



Första field name är standardsökningen:

```

<field name="name" string="Opportunity"
  filter_domain="[('partner_id', 'ilike', self),
    ('partner_name', 'ilike', self), ('email_from', 'ilike', self),
    ('name', 'ilike', self)]"/>

```

Övriga field name är:

```

<field name="tag_ids" string="Tag" filter_domain="[('tag_ids', 'ilike', self)]"/>
<field name="stage_id" domain="[]"/>
<field name="user_id"/>
<field name="team_id"/>
<field name="partner_id" operator="child_of" string="Customer"/>
<field name="city"/>
<field name="country_id"/>
<field name="activity_type_id"/>

```

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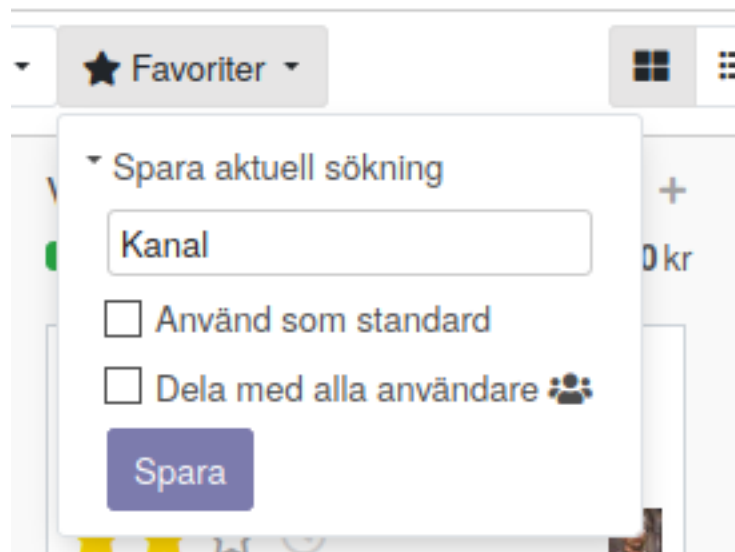
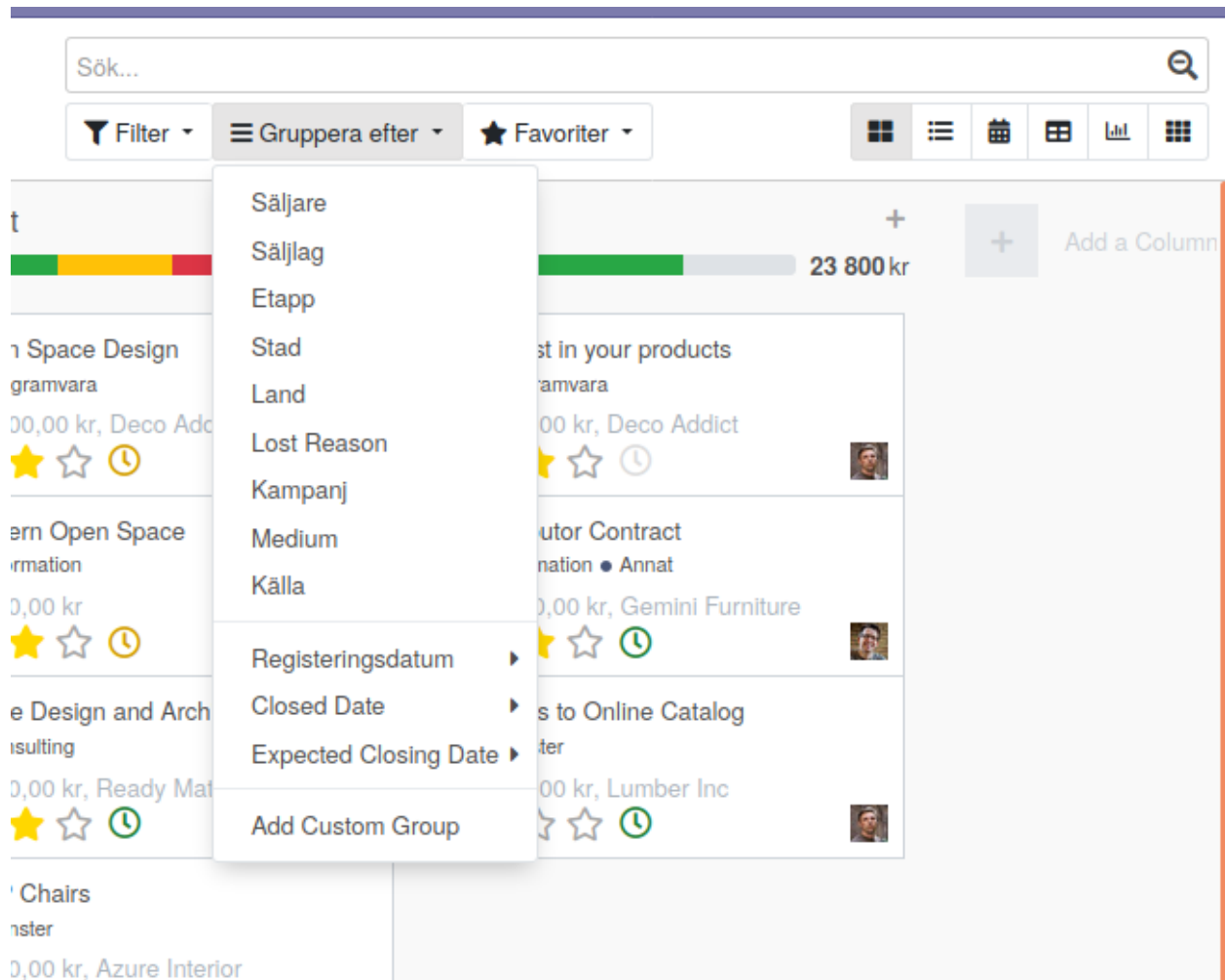
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```
<field name="activity_summary"/>
<field name="probability"/>
<field name="lost_reason"/>
<field name="date_conversion"/>
<separator/>
```

The screenshot displays the Odoo CRM interface in Kanban view. At the top, there is a search bar labeled 'Sök...' and a toolbar with buttons for 'Filter', 'Gruppera efter', 'Favoriter', and various view icons. A filter menu is open on the left, listing various filters such as 'Min kanal', 'Ej tilldelade', 'Open Opportunities', 'Olästa meddelanden', 'Overdue Opportunities', 'Registreringsdatum', 'Förväntat avslut', 'Closed Date', 'Vunnit', 'Förlorade', 'Activities Todo', 'Late Activities', 'Today Activities', 'Future Activities', and 'Anpassat filter'. The main area shows a Kanban board with a column titled 'Vunnit' containing a progress bar and the value '23 800 kr'. Below this, three leads are visible:

- Interest in your products**
• Programvara
2 000,00 kr, Deco Addict
Rating: 3 stars (2 yellow, 1 grey), with a clock icon.
- Distributor Contract**
• Information • Annat
19 800,00 kr, Gemini Furniture
Rating: 3 stars (2 yellow, 1 grey), with a clock icon.
- Access to Online Catalog**
• Tjänster
2 000,00 kr, Lumber Inc
Rating: 3 stars (all grey), with a clock icon.

Each lead includes a small profile picture of the contact. The bottom of the interface shows a 'Resizable Desk' and a 'tukt' button.



2.1 Vyer deklarerar i XML

- Vyer är deklarerade i XML
- Arv implementeras med xpath (eller förenklad syntax)
- En vy startas via en action-record

<https://medium.com/@reedrehg/clicking-everywhere-in-odoo-c659e9c6f09b>

The screenshot displays the Odoo CRM Kanban view. The interface includes a top navigation bar with 'CRM' and tabs for 'Försäljning', 'Rapportering', and 'Konfiguration'. A search bar and filter options are at the top right. The main area shows four Kanban columns: 'Ny' (New), 'Kvalificerad' (Qualified), 'Offert' (Offer), and 'Vunnit' (Won). Each column has a header with a plus sign and a total value. The 'Ny' column has a value of 104k kr, 'Kvalificerad' has 87 300 kr, 'Offert' has 105k kr, and 'Vunnit' has 23 800 kr. Red circles 1, 2, and 3 highlight specific elements: 1 points to the 'Ny' column header, 2 points to the 'Kvalificerad' column header, and 3 points to a lead in the 'Kvalificerad' column.

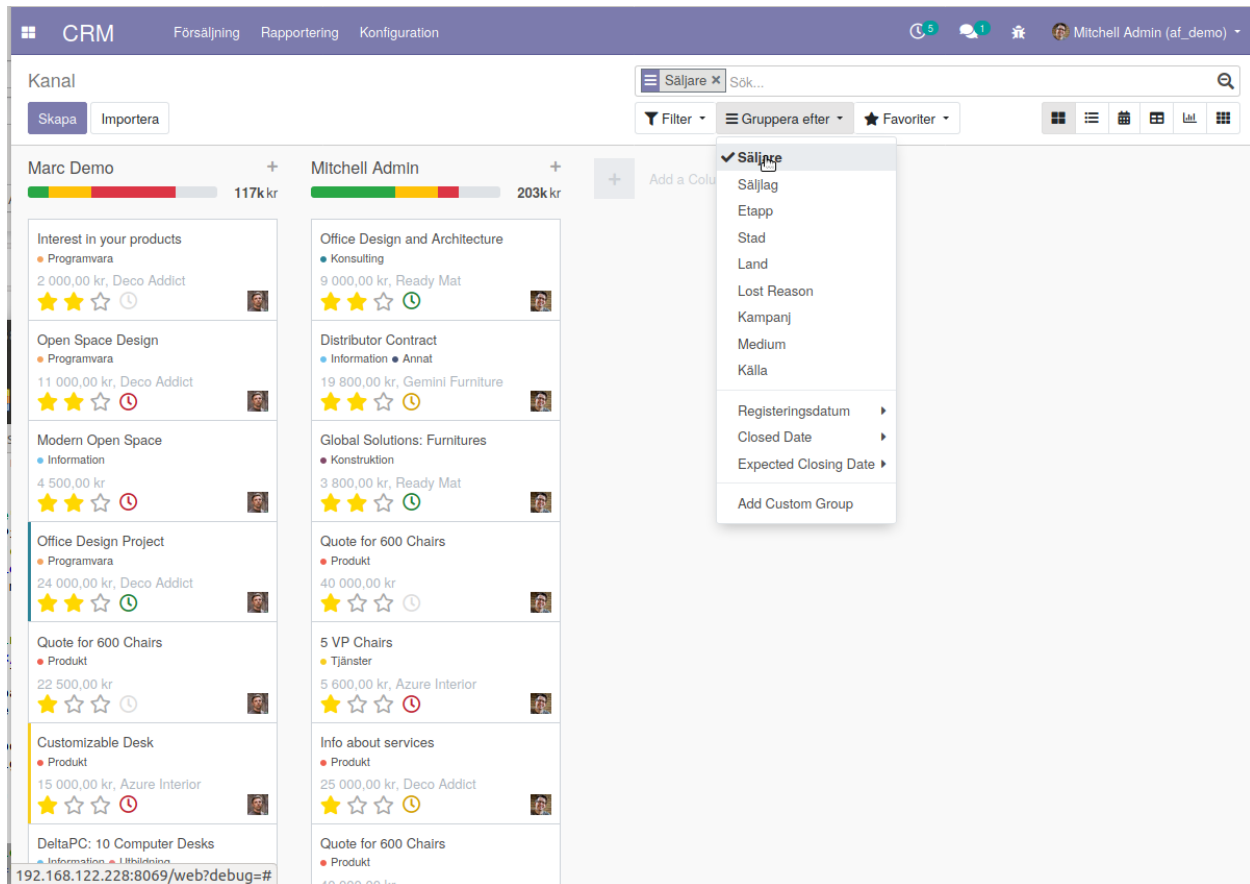
Kolumn	Lead	Värde	Status
Ny	Office Design Project	24 000,00 kr, Deco Addict	Programvara
	Quote for 600 Chairs	40 000,00 kr	Produkt
	Quote for 600 Chairs	40 000,00 kr	Produkt
Kvalificerad	Global Solutions: Furnitures	3 800,00 kr, Ready Mat	Konstruktion
	Quote for 600 Chairs	22 500,00 kr	Produkt
	DeltaPC: 10 Computer Desks	35 000,00 kr, Ready Mat	Information, Utbildning
	Balmer Inc: Potential Distributor	1 000,00 kr	Tjänster, Information
	Info about services	25 000,00 kr, Deco Addict	Produkt
Offert	Open Space Design	11 000,00 kr, Deco Addict	Programvara
	Modern Open Space	4 500,00 kr	Information
	Office Design and Architecture	9 000,00 kr, Ready Mat	Konsulting
	5 VP Chairs	5 600,00 kr, Azure Interior	Tjänster
	Customizable Desk	15 000,00 kr, Azure Interior	Produkt
Vunnit	Interest in your products	2 000,00 kr, Deco Addict	Programvara
	Distributor Contract	19 800,00 kr, Gemini Furniture	Information, Annat

2.2 Kanban

I Kanban fokusera man på att avsluta uppgifter inte inleda dem. Kanban kännetecknar också att man med tydliga och visuella signaler visar organisationens arbetsflöde. Man ser till att begränsa pågående arbetsuppgifter, man använder visuella metoder som lappar för att kommunicera, man jagar flaskhalsar och man ser till att återkoppla för att effektivisera ytterligare.

The screenshot displays the Odoo CRM Kanban view. The top navigation bar includes 'CRM', 'Försäljning', 'Rapportering', and 'Konfiguration'. The user is logged in as 'Mitchell Admin (af_demo)'. The view is titled 'Kanal' and has a search bar. Below the title, there are buttons for 'Skapa' (highlighted with a red circle 1) and 'Importera'. The main area shows four columns: 'Ny' (104k kr), 'Kvalificerad' (87 300 kr, highlighted with a red circle 2), 'Offert' (105k kr), and 'Vunnit' (23 800 kr). Each column contains task cards. The 'Kvalificerad' column has a red circle 3 highlighting a task card. The task cards include details like 'Office Design Project', 'Quote for 600 Chairs', 'Global Solutions: Furnitures', 'DeltaPC: 10 Computer Desks', 'Balmer Inc: Potential Distributor', 'Info about services', 'Open Space Design', 'Modern Open Space', 'Office Design and Architecture', '5 VP Chairs', 'Customizable Desk', 'Need 20 Desks', 'Interest in your products', 'Distributor Contract', and 'Access to Online Catalog'. Each card shows a status, a price, and a rating.

Kraftfullt verktyg som visar progress eller kan användas för att fördela uppgifter



Kanban-strukturen:

```
<kanban>
  Lista ingående fält
  <field name="priority"/>
  <field name="xxxx"/>

  <progressbar/>

  <templates>
    Beskrivning av lappen
  </templates>
</kanban>
```

1) Kanban-record:

```
<kanban
  default_group_by="stage_id"
  class="o_kanban_small_column o_opportunity_kanban"
  on_create="quick_create"
  quick_create_view="crm.quick_create_opportunity_form"
  archivable="false">
```

2) Progressbar:

```
<progressbar field="activity_state"
```

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```

        colors="{&quot;planned&quot;;: &quot;success&quot;;, &quot;today&quot;;: &quot;
↪warning&quot;;, &quot;overdue&quot;;: &quot;danger&quot;;}"
        sum_field="planned_revenue"
        help="This bar allows to filter the opportunities based on scheduled_
↪activities."/>

```

3) Lappen:

```

<templates>
  <t t-name="kanban-box">
    <div t-attf-class="#{kanban_color(record.color.raw_value)} oe_kanban_
↪global_click">
      <div class="o_dropdown_kanban dropdown"> Meny
    </div>
    <div class="oe_kanban_content">
      Innehåll
      <div class="o_kanban_record_bottom">
        <div class="oe_kanban_bottom_left" />
        <div class="oe_kanban_bottom_right" />
      </div>
    </div>
  </t>
</templates>

```

Hela kanban-koden:

```

<kanban default_group_by="stage_id" class="o_kanban_small_column o_opportunity_kanban
↪" on_create="quick_create" quick_create_view="crm.quick_create_opportunity_form"
↪archivable="false">
  <field name="stage_id" options="{&quot;group_by_tooltip&quot;;: {&quot;
↪requirements&quot;;: &quot;Description&quot;;, &quot;legend_priority&quot;;: &quot;Use_
↪of stars&quot;;}}"/>
  <field name="color"/>
  <field name="priority"/>
  <field name="planned_revenue"/>
  <field name="kanban_state"/>
  <field name="activity_date_deadline"/>
  <field name="user_email"/>
  <field name="user_id"/>
  <field name="partner_address_email"/>
  <field name="message_needaction_counter"/>
  <field name="partner_id"/>
  <field name="activity_summary"/>
  <field name="active"/>
  <field name="company_currency"/>
  <field name="activity_state"/>
  <field name="activity_ids"/>
  <progressbar field="activity_state" colors="{&quot;planned&quot;;: &
↪quot;success&quot;;, &quot;today&quot;;: &quot;warning&quot;;, &quot;overdue&quot;;: &
↪quot;danger&quot;;}" sum_field="planned_revenue" help="This bar allows to filter the_
↪opportunities based on scheduled activities."/>
  <templates>
    <t t-name="kanban-box">
      <div t-attf-class="#{kanban_color(record.color.raw_value)} oe_
↪kanban_global_click">
        <div class="o_dropdown_kanban dropdown">

```

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```

        <a class="dropdown-toggle o-no-caret btn" role="button"
↪ " data-toggle="dropdown" href="#" aria-label="Dropdown menu" title="Dropdown menu">
            <span class="fa fa-ellipsis-v"/>
        </a>
        <div class="dropdown-menu" role="menu">
            <t t-if="widget.editable"><a role="menuitem" type=
↪ "edit" class="dropdown-item">Edit</a></t>
            <t t-if="widget.deletable"><a role="menuitem"
↪ type="delete" class="dropdown-item">Delete</a></t>
            <ul class="oe_kanban_colorpicker" data-field=
↪ "color"/>
        </div>
    </div>
    <div class="oe_kanban_content">
        <div>
            <strong class="o_kanban_record_title"><field name=
↪ "name"/></strong>
        </div>
        <div>
            <field name="tag_ids" widget="many2many_tags"
↪ options="{ 'color_field': 'color' }"/>
        </div>
        <div class="text-muted o_kanban_record_subtitle">
            <t t-if="record.planned_revenue.raw_value"><field
↪ name="planned_revenue" widget="monetary" options="{ 'currency_field': 'company_
↪ currency' }"/><span t-if="record.partner_id.value">,</span></t> <span t-if="record.
↪ partner_id.value"> <t t-esc="record.partner_id.value"/></span>
        </div>

        <div class="o_kanban_record_bottom">
            <div class="oe_kanban_bottom_left">
                <field name="priority" widget="priority"
↪ groups="base.group_user"/>
                <t t-if="record.message_needaction_counter.
↪ raw_value">
                    <span role="alert" class="oe_kanban_mail_
↪ new" title="Unread Messages"><i class="fa fa-comments" aria-label="Unread messages"
↪ role="img"/><t t-raw="record.message_needaction_counter.raw_value"/></span>
                </t>
                <field name="activity_ids" widget="kanban_
↪ activity"/>
            </div>
            <div class="oe_kanban_bottom_right">
                
            </div>
        </div>
    </div>
    <div class="oe_clear"/>
</div>
</t>
</templates>
</kanban>

```

2.3 Trädvy (lista)

- Etiketter för gjorda val (filter/gruppering/favorit)
- Använd förstoringsglasat för att se extra funktioner

The screenshot shows the Odoo Contacts (Kontakter) interface. The top bar includes the 'Kontakter' title and navigation links for 'Kontakter' and 'Konfiguration'. The user 'Mitchell Admin' is logged in. The interface features a search bar with a 'Land' filter and a 'Sök...' button. Below the search bar, there are buttons for 'Skapa', 'Importerera', 'Åtgärd', 'Filter', 'Gruppera efter', and 'Favoriter'. The main content area displays a list of contacts grouped by country. The 'Sverige' group is expanded, showing 11 contacts. The 'AF Järfälla' contact is selected. The contact list has columns for 'Namn', 'Telefon', and 'E-post'.

Namn	Telefon	E-post
AF HK		
AF Järfälla		
AF Solna		
AF Solna, Bertil Andersson	08-125 8465	brandon.freeman@af.se
AF Solna, Caroline Dimson	0255-595-8393	caronline.dimson@af.se
AF Globen		
AF Globen, Filip Stenander	(145)-138-3401	filip.stenander@af.se
Alla typer av blommor AB	(941)-284-4875	gemini.furniture39@example.com
Alla typer av blommor AB, Sven Palmer		
Anna Sökare		
Demobolaget	+1 555 123 8069	info@yourcompany.example.com

- 1) Drill down, gruppering i flera led
- 2) Kryssa objekt
- 3) Metoder som gör något med kryssade objekt

kod för trädvyn:

```
<tree string="Contacts">
    <field name="display_name" string="Name"/>
    <field name="function" invisible="1"/>
    <field name="phone"/>
    <field name="email"/>
    <field name="user_id" invisible="1"/>
    <field name="is_company" invisible="1"/>
    <field name="country_id" invisible="1"/>
    <field name="parent_id" invisible="1"/>
    <field name="active" invisible="1"/>
</tree>
```

2.4 Söktyper

2.5 Kalender

kod för kalender:

```
<calendar string="Meetings" date_start="start" date_stop="stop" date_delay="duration"
↪all_day="allday"
                                readonly_form_view_id="384" event_open_popup="true" event_
↪limit="3" color="partner_id">
    <field name="name"/>
    <field name="partner_ids" write_model="calendar.contacts" write_field=
↪"partner_id"
                                avatar_field=
↪"image_small"/>
    <field name="is_highlighted" invisible="1"/>
</calendar>
```


2.6 Söktyper

2.7 Pivot

- Pivottabell (BI kub)
- Underlag vyer på anslagstavla

The screenshot shows the Odoo CRM interface. At the top, there's a navigation bar with 'CRM', 'Försäljning', 'Rapportering', and 'Konfiguration'. Below this, a search bar contains 'Säljare' and a search icon. A 'Filter' button is visible. The main area displays a pivot table with columns: 'Totalt', 'Ny', 'Kvalificerad', 'Offert', and 'Vunnit'. The rows are 'Totalt', 'Marc Demo', and 'Mitchell Admin'. A context menu is open over the table, listing various fields like 'Affärsmöjlighet', 'Aktiv', 'Bolag', 'Closed Date', 'Conversion Date', 'E-post', 'Etapp', 'Förväntat avslut', 'Gata', 'Gata 2', 'Hänvisad av', 'Kampanj', 'Kontaktname', 'Kund', 'Kundnamn', 'Källa', 'Land', 'Lost Reason', 'Main Attachment', 'Medium', 'Mobil', 'Postnummer', 'Prioritet (0=Mycket bråttom)', 'Senast uppdaterad', 'Senast uppdaterad av', and 'Senaste etappuppdatering'.

Totalt	Ny	Kvalificerad	Offert	Vunnit
Förväntad intäkt	Förväntad intäkt	Förväntad intäkt	Förväntad intäkt	Förväntad intäkt
64 000,00	87 300,00	145 100,00	23	
Marc Demo	24 000,00	58 500,00	30 500,00	4
Mitchell Admin	40 000,00	28 800,00	114 600,00	19

kod för pivottabellen:

```
<record id="crm_lead_action_activities" model="ir.actions.act_window">
  <field name="name">Next Activities</field>
  <field name="type">ir.actions.act_window</field>
  <field name="res_model">crm.lead</field>
  <field name="view_mode">tree,form,kanban,calendar,pivot,graph</field>
  <field name="search_view_id" ref="crm.view_crm_case_opportunities_filter"/>
  <field name="view_ids"
    eval="[(5, 0, 0), (0, 0, {'view_mode': 'tree', 'view_id': ref('crm_
    ↪lead_view_tree_activity'))),
    (0, 0, {'view_mode': 'form', 'view_id': ref('crm_case_form_
    ↪view_oppor'))),
    (0, 0, {'view_mode': 'kanban'}), (0, 0, {'view_mode': 'calendar
    ↪'}), (0, 0, {'view_mode': 'pivot'}), (0, 0, {'view_mode': 'graph'})]">
    <field name="domain">[('type','=', 'opportunity'), ('activity_date_deadline',
    ↪ '!=', False)]</field>
```

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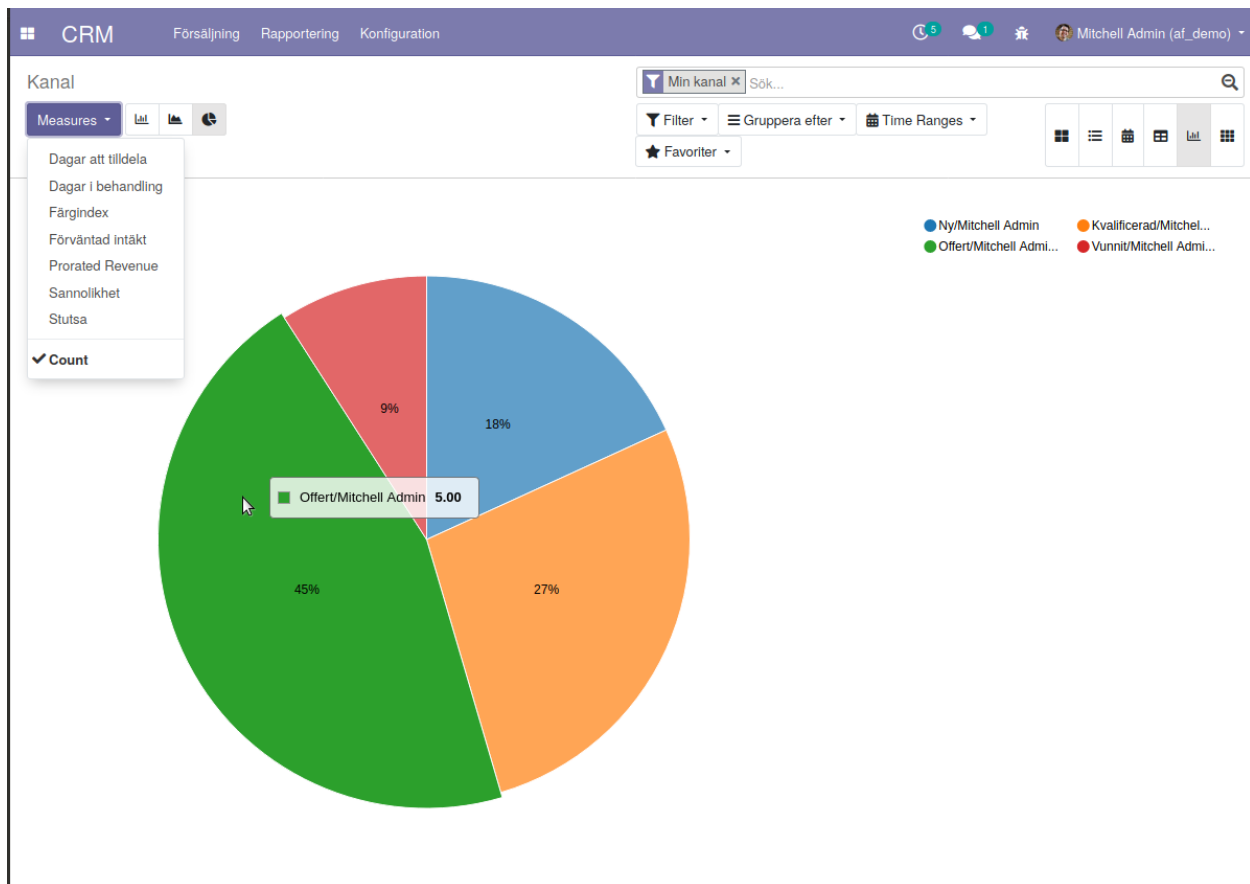
```

<field name="context">{
    'default_type': 'opportunity',
    'default_user_id': uid,
    'search_default_activities_my': 1,
}
</field>
<field name="help" type="html">
    <p class="o_view_nocontent_empty_folder">
        No next activity
    </p><p>
        Here is the list of your next activities. Those are linked to your
        ↪ opportunities.
        To set a next activity, go on an opportunity and add one. It will
        ↪ then appear in this list.
    </p>
</field>
</record>

```

2.8 Diagram

- Urval, grupperingar, värden dynamiskt valbara
- Lägg på anslagstavla



kod för vyn:

```
<record id="crm_lead_view_graph" model="ir.ui.view">
  <field name="name">crm.lead.view.graph</field>
  <field name="model">crm.lead</field>
  <field name="arch" type="xml">
    <graph string="Opportunities">
      <field name="stage_id" type="col"/>
      <field name="user_id" type="row"/>
    </graph>
  </field>
</record>
```

2.9 Formulär

The screenshot shows the Odoo CRM interface for a lead named 'Deco Addict'. The main form is titled 'Open Space Design' and shows a value of '11 000,00 kr på 45 %'. The form is divided into sections for customer information (Kund, E-post, Telefon), salesperson information (Säljare, Säljlag), and expected completion (Förväntat avslut). There are also tabs for 'Märk vinst', 'Märk förlorad', 'Ny', 'Kvalificerad', 'Offert', and 'Vunnit'. Below the form is a 'Planned activities' section showing a task 'Send Catalog by Email' and a chat window with 'OdooBot'.

kod för formuläret:

```
<form string="Opportunities" class="o_opportunity_form">
<header>
<button name="action_set_won_rainbowman" string="Mark Won" type="object" class="oe_
highlight" attrs="{ 'invisible': [ '|', ('active', '=', False), ('probability', '=',
100) ] }"/>
<button name="136" string="Mark Lost" type="action" class="oe_highlight" context="{
'default_lead_id': active_id}" attrs="{ 'invisible': [ ('active', '=', False), (
'probability', '&lt;', 100) ] }"/>
<button name="toggle_active" string="Restore" type="object" attrs="{ 'invisible': [ '|',
('probability', '&gt;', 0), ('active', '=', True) ] }"/>
```

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```
<field name="stage_id" widget="statusbar" options="{ 'clickable': '1', 'fold_field':
↳ 'fold'}" domain="[('team_id', '=', team_id), ('team_id', '=', False)]" attrs="{
↳ 'invisible': [('active', '=', False)]}"/>
</header>
<sheet>
<field name="active" invisible="1"/>
<div class="oe_button_box" name="button_box">
<button class="oe_stat_button" type="object" context="{ 'partner_id': partner_id}"
↳ name="action_schedule_meeting" icon="fa-calendar">
<div class="o_stat_info">
<field name="meeting_count" class="o_stat_value"/>
<span class="o_stat_text" attrs="{ 'invisible': [('meeting_count', '<', 2)]}">
↳ Meetings</span>
<span class="o_stat_text" attrs="{ 'invisible': [('meeting_count', '>', 1)]}">
↳ Meeting</span>
</div>
</button>
</div>
<div class="badge-pill badge-danger float-right" attrs="{ 'invisible': [('', (
↳ 'probability', '>', 0), ('active', '=', True))]}>Lost</div>
<div class="badge-pill badge-success float-right" attrs="{ 'invisible': [('probability
↳ ', '<', 100)]}">Won</div>
<div class="oe_title">
<label for="name" class="oe_edit_only"/>
<h1><field name="name" placeholder="e.g. Product Pricing"/></h1>
<h2 class="o_row row no-gutters d-flex">
<div class="col">
<label for="planned_revenue" class="oe_edit_only"/>
<div class="o_row">
<field name="company_currency" invisible="1"/>
<field name="planned_revenue" class="oe_inline" widget="monetary" options="{ 'currency_
↳ field': 'company_currency' }"/>
<span class="oe_grey"> at </span>
</div>
</div>
<div class="col">
<label for="probability" class="oe_edit_only"/>
<div class="o_row d-flex">
<field name="probability" widget="integer" class="oe_inline"/>
<span class="oe_grey"> %</span>
</div>
</div>
</h2>
</div>
<group>
<group>
<field name="partner_id" widget="res_partner_many2one" string="Customer"
```

```
domain="[('customer', '=', True)]" context="{ 'search_default_customer': 1, 'default_name': partner_name, 'de-
fault_street': street,'default_street2': street2, 'default_city': city,'default_state_id': state_id, 'default_zip': zip,
'default_country_id': country_id,'default_function': function, 'default_phone': phone, 'default_mobile': mobile,
'default_email': email_from, 'default_user_id': user_id, 'default_team_id': team_id, 'default_website': web-
site,'show_vat': True,}"/> <field name="is_blacklisted" invisible="1"/> <field name="partner_is_blacklisted"
invisible="1"/> <label for="email_from" class="oe_inline"/> <div class="o_row o_row_readonly"> <i
class="fa fa-ban" style="color: red;" role="img" title="This email is blacklisted for mass mailing" aria-la-
bel="Blacklisted" attrs="{ 'invisible': [('', ('is_blacklisted', '=', False), ('partner_address_email', '!=', False))]}>
groups="base.group_user"/> <field name="email_from" attrs="{ 'invisible': [('', ('partner_address_email', '!=',
```

```
False]]" string="Email" widget="email"/> <i class="fa fa-ban" style="color: red;" role="img" title="This email
is blacklisted for mass mailing" aria-label="Blacklisted" attrs="{ 'invisible': [!], ('partner_is_blacklisted', '=',
False), ('partner_address_email', '=', False)]}" groups="base.group_user"/> <field name="partner_address_email"
attrs="{ 'invisible': [!], ('partner_address_email', '=', False)]}" widget="email" string="Email"/> </div> <field
name="partner_address_phone" attrs="{ 'invisible': [!], ('partner_address_phone', '=', False)]}" readonly="1"
widget="phone" string="Phone"/> <field name="phone" attrs="{ 'invisible': [!], ('partner_address_phone',
'!=', False)]}" widget="phone"/> </group> <group> <field name="date_deadline"/> </group> <group>
<field name="user_id" context="{ 'default_groups_ref': ['base.group_user', 'base.group_partner_manager',
'sales_team.group_sale_salesman_all_leads'], 'team_id': team_id}" domain="[('share', '=', False)]"/> <field
name="team_id" widget="selection"/> </group> <group> <field name="priority" widget="priority"/> <field
name="tag_ids" widget="many2many_tags" options="{ 'color_field': 'color', 'no_create_edit': True}" /> <field
name="lost_reason" attrs="{ 'invisible': [!], ('active', '=', True)]}" /> <field name="date_conversion" invisible="1"/>
</group> </group> <notebook colspan="4"> <page string="Internal Notes"> <field name="description"/>
</page> <page name="lead" string="Followup"> <group> <group string="Initial Contact Information">
<field name="partner_name"/> <label for="street" string="Address"/> <div class="o_address_format"> <field
name="street" placeholder="Street..." class="o_address_street"/> <field name="street2" placeholder="Street
2..." class="o_address_street"/> <field name="city" placeholder="City" class="o_address_city"/> <field
name="state_id" class="o_address_state" placeholder="State" options="{ '&quot;no_open&quot;: True}" />
<field name="zip" placeholder="ZIP" class="o_address_zip"/> <field name="country_id" placeholder="Country"
class="o_address_country" options="{ '&quot;no_open&quot;: True, '&quot;no_create&quot;: True}" /> </div>
<field name="website" widget="url" placeholder="e.g. https://www.odoo.com"/> </group> <group class="mt48">
<label for="contact_name"/> <div class="o_row"> <field name="contact_name"/> <field name="title" place-
holder="Title" domain="[]" options="{ '&quot;no_open&quot;: True}" /> </div> <field name="function"/> <field
name="partner_address_mobile" attrs="{ 'invisible': [!], ('partner_address_mobile', '=', False)]}" readonly="1"
widget="phone" string="Mobile"/> <field name="mobile" attrs="{ 'invisible': [!], ('partner_address_mobile',
'!=', False)]}" widget="phone"/> </group> <group string="Marketing"> <field name="campaign_id"/> <field
name="medium_id"/> <field name="source_id"/> </group> <group string="Misc" name="Misc"> <field
name="day_open" groups="base.group_no_one"/> <field name="day_close" groups="base.group_no_one"/> <field
name="referred"/> <field name="type" invisible="1"/> </group> </group> </page> </notebook> </sheet> <div
class="oe_chatter"> <field name="message_follower_ids" widget="mail_followers"/> <field name="activity_ids"
widget="mail_activity"/> <field name="message_ids" widget="mail_thread" options="{ 'post_refresh': 'recipi-
ents' }"/> </div> </form>
```

2.9.1 Progress bar

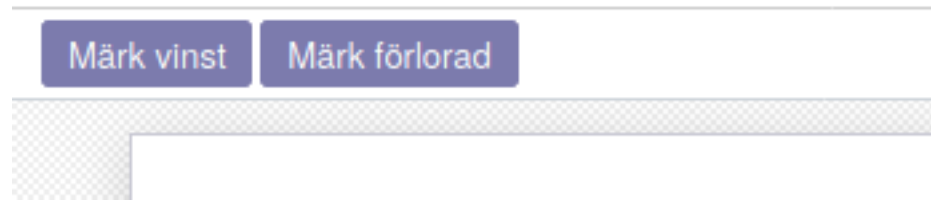


Kod för progressbar:

```
<field name="stage_id" widget="statusbar"
```

```
options="{ 'clickable': '1', 'fold_field': 'fold'}" domain="[!], ('team_id', '=', team_id), ('team_id', '=', False)]"
attrs="{ 'invisible': [!], ('active', '=', False)]}" />
```

2.9.2 Knappar

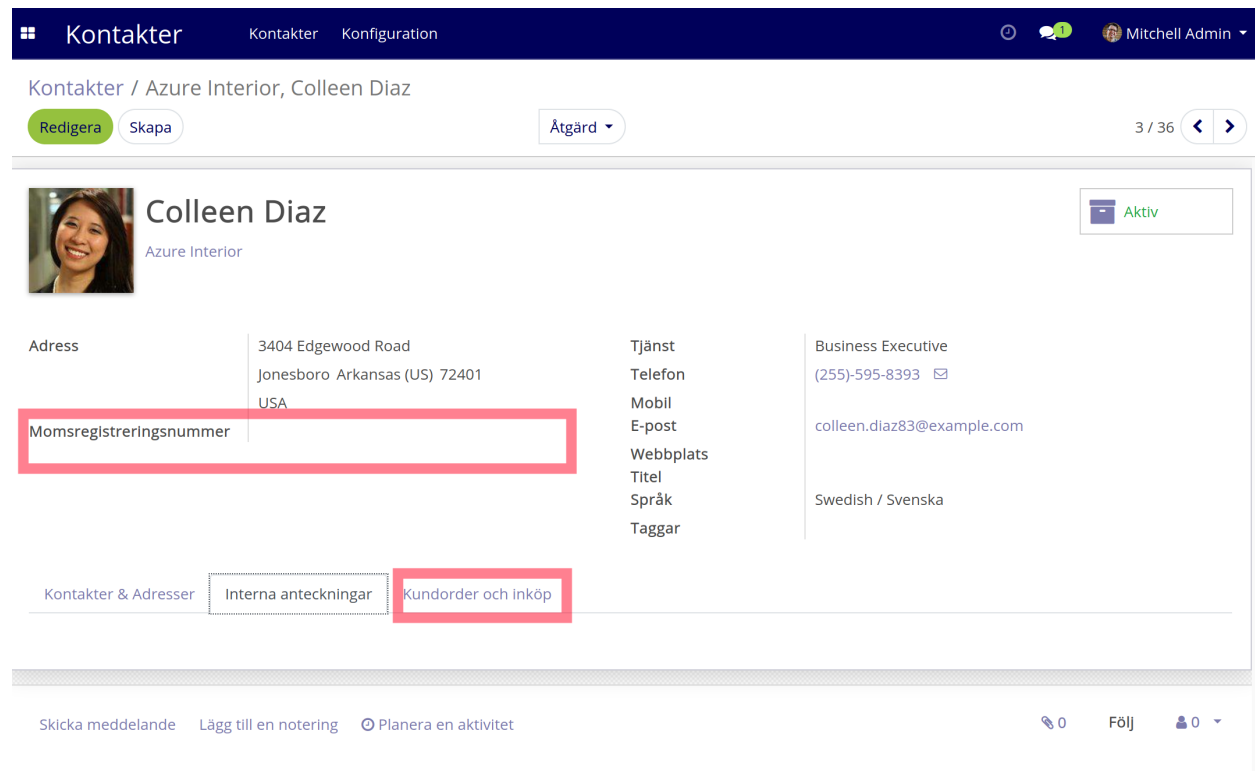


Kod för funktionsknapp:

```
<button name="action_set_won_rainbowman" string="Mark Won" type="object"
```

```
class="oe_highlight" attrs="{ 'invisible': ['l', ('active', '=', False), ('probability', '=', 100)] }" />
```

2.9.3 Dölja formulärelement



Kod för group:

```
group="admin"
```

2.10 Aktiviteter

- Listar aktiviteter, aktivitetstyp och dess status
- Använd förstöringsglaset för att se extra funktioner

CRM

Försäljning

Rapporter

Konfiguration

2

1

Mitchell Admin (af_demo)

Kanal

Min kanal

Sök...

Filter

Favoriter

	E-post	Call
5 VP Chairs	29 feb	
Modern Open Space		2 mar
Info about services		3 mar
Distributor Contract		3 mar
Global Solutions: Furnitures		4 mar
Need 20 Desks	4 mar	
Quote for 600 Chairs		5 mar
Office Design and Architecture		6 mar

kod för sökrutan

```
<search string="Search Opportunities">
  <field name="name" string="Opportunity" filter_domain="['|', '|', '|', (
↪ 'partner_id', 'ilike', self), ('partner_name', 'ilike', self), ('email_from', 'ilike',
↪ self), ('name', 'ilike', self)]"/>
  <field name="tag_ids" string="Tag" filter_domain="(['tag_ids', 'ilike
↪ ', self)]"/>
  <field name="stage_id" domain="[]"/>
  <field name="user_id"/>
  <field name="team_id"/>
  <field name="partner_id" operator="child_of" string="Customer"/>
  <field name="city"/>
  <field name="country_id"/>
  <field name="activity_type_id"/>
  <field name="activity_summary"/>
  <field name="probability"/>
  <field name="lost_reason"/>
  <field name="date_conversion"/>
  <separator/>
  <filter string="My Pipeline" name="assigned_to_me" domain="(['user_id
↪ ', '=', uid)]" help="Opportunities that are assigned to me"/>
  <filter string="Unassigned" name="unassigned" domain="(['user_id', '=',
↪ False)]" help="No salesperson"/>
  <filter string="Open Opportunities" name="open_opportunities" domain=
↪ "(['probability', '<', 100), ('type', '=', 'opportunity)]" help="Open
↪ Opportunities"/>
```

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```

        <separator/>
        <filter string="Unread Messages" name="message_needaction" domain="[(
↪ 'message_needaction', '=', True)]"/>
        <separator/>
        <filter string="Overdue Opportunities" name="overdue_opp" domain="[(
↪ 'date_deadline', '<', context_today().strftime('%Y-%m-%d')), ('date_closed', '=',
↪ False)]" help="Opportunities with a date of Expected Closing which is in the past"/
↪ >
        <filter string="Creation Date" name="creation_date" date="create_date
↪ "/>
        <filter string="Expected Closing" name="close_this_month" date="date_
↪ deadline"/>
        <filter string="Closed Date" name="close_date" date="date_closed"/>
        <separator/>
        <filter string="Won" name="won" domain="['&', ('active', '=',
↪ True), ('stage_id.probability', '=', 100)]"/>
        <filter string="Lost" name="lost" domain="['&', ('active', '=',
↪ False), ('probability', '=', 0)]"/>
        <separator/>
        <filter string="Activities Todo" name="activities_my" domain="[(
↪ 'activity_ids.user_id', '=', uid)]"/>
        <separator/>
        <filter string="Late Activities" name="activities_overdue" domain="[(
↪ 'activity_ids.date_deadline', '<', context_today().strftime('%Y-%m-%d'))]" help=
↪ "Show all opportunities for which the next action date is before today"/>
        <filter string="Today Activities" name="activities_today" domain="[(
↪ 'activity_ids.date_deadline', '=', context_today().strftime('%Y-%m-%d'))]" />
        <filter string="Future Activities" name="activities_upcoming_all"
↪ domain="[( 'activity_ids.date_deadline', '>', context_today().strftime('%Y-%m-%d
↪ '))
        ]"/>
        <group expand="0" string="Group By" colspan="16">
        <filter string="Salesperson" name="salesperson" context="{ 'group_
↪ by': 'user_id' }"/>
        <filter string="Sales Team" name="saleschannel" context="{ 'group_
↪ by': 'team_id' }"/>
        <filter name="stage" string="Stage" context="{ 'group_by': 'stage_id
↪ ' }"/>
        <filter name="city" string="City" context="{ 'group_by': 'city' }"/>
        <filter string="Country" name="country" context="{ 'group_by':
↪ 'country_id' }"/>
        <filter string="Lost Reason" name="lostreason" context="{ 'group_by
↪ ': 'lost_reason' }"/>
        <filter string="Company" name="company" context="{ 'group_by':
↪ 'company_id' }" groups="base.group_multi_company"/>
        <filter string="Campaign" name="campaign" domain="[]" context="{
↪ 'group_by': 'campaign_id' }"/>
        <filter string="Medium" name="medium" domain="[]" context="{
↪ 'group_by': 'medium_id' }"/>
        <filter string="Source" name="source" domain="[]" context="{
↪ 'group_by': 'source_id' }"/>
        <separator orientation="vertical"/>
        <filter string="Creation Date" context="{ 'group_by': 'create_
↪ date:month' }" name="month"/>
        <filter string="Conversion Date" name="date_conversion" context="{
↪ 'group_by': 'date_conversion' }" groups="crm.group_use_lead"/>
        <filter string="Closed Date" name="date_closed" context="{ 'group_
↪ by': 'date_closed' }"/>

```


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```

        <filter string="Expected Closing Date" name="date_deadline">
    ↪context="{ 'group_by': 'date_deadline' }"/>
        </group>
    </search>

```



views/Markering_824.png

Första field name är standardsökningen.

```

<field name="name" string="Opportunity"
    filter_domain="[('partner_id', 'ilike', self),
        ('partner_name', 'ilike', self), ('email_from', 'ilike', self),
        ('name', 'ilike', self)]"/>

```

Övriga field name:

```

<field name="tag_ids" string="Tag" filter_domain="[('tag_ids', 'ilike', self)]"/>
<field name="stage_id" domain="[]"/>
<field name="user_id"/>
<field name="team_id"/>
<field name="partner_id" operator="child_of" string="Customer"/>
<field name="city"/>
<field name="country_id"/>
<field name="activity_type_id"/>
<field name="activity_summary"/>
<field name="probability"/>
<field name="lost_reason"/>
<field name="date_conversion"/>
<separator/>

```


CHAPTER 3

Chatter

CHAPTER 4

Aktivitet

CHAPTER 5

Meny


6.1 Grafiska element för användning i formulär och trädvyer

6.1.1 Grafiska element för `many2many` -fält i Odoo

1. `many2many` (förvalt)
2. `many2many_tags`
3. `many2many_checkboxes`
4. `many2many_kanban`
5. `many2many_counter`
6. `many2many_binary`

6.1.2 `many2many` (förvalt)

Widgeten `many2many` använder en förvald listvy för relaterad modell för att visa en lista av relaterade objekt.

A thing	It's owner	
foo	Administrator	
bar	Administrator	
baz	Administrator	
Add an item		

Alternativ

- `no_create` - tar bort "Create" knappen.

Exempel

```
<field name="field_name_ids" options="{ 'no_create': True }"/>
```

Widgeten many2many_tags

En Facebookliknande flervalsmarkering.



Alternativ

- no_quick_create - tar bort Create and edit... alternativet.
- no_quick_edit - tar bort Skapa "foo" alternativet.



- no_create - no_quick_create och no_create_edit kombinerat.

Exempel

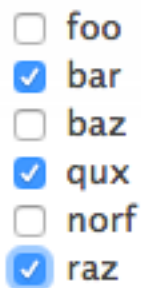
```
<field name="field_name"
widget="many2many_tags"
options="{ 'no_create_edit': True }"/>
```

Widgeten many2many_checkboxes

Enligt en notering i dokumentationen till Odoo:

This `type` of field display a `list` of checkboxes. It works only **with** `m2ms`. This field will display one checkbox **for** each record existing **in** the model targeted by the relation, according to the given domain **if** one **is** specified. Checked records will be added to the relation.

Det finns ingen möjlighet för denna widgt att skapa nya poster, exempelvis produkter.



Exempel

```
<field name="field_name" widget="many2many_checkboxes"/>
```

many2many_kanban widgeten

Widgeten `many2many_kanban` använder Kanbanvyn för att visa en lista av relaterade objekt.

Denna widget kan varieras på många sätt beroende på vilken Kanbanvy som används. Här är en skärmbild från `project` modulen:



Exempel

```
<field name="field_name" widget="many2many_kanban">
  <kanban>
    <field name="name"/>
    <templates>
      <t t-name="kanban-box">
        <field name="name"/>
      </t>
    </templates>
  </kanban>
</field>
```

many2many_counter widgeten

En enkel läs-endast widget som visar en länk med information om antalet relaterade objekt. Länkens målvy kan bli konfigurerad via `views` alternativet.

Denna är även användbar med `one2many` fält.

45 things

Alternativ

- `views` Enligt en kommentar i dokumentationen till Odoos källkod:

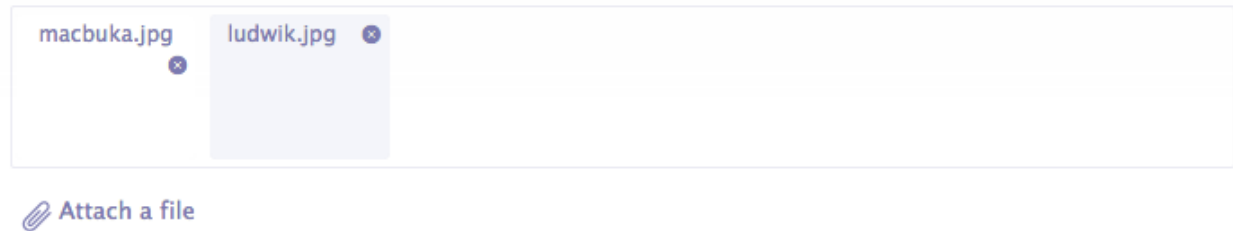
```
The views to display in the act_window action. Must be a list of tuple whose
first element is the id of the view to display (or False to take the default one)
and the second element is the type of the view. Defaults to [[false,
"tree"], [false, "form"]].
```

```
<field name="field_name" widget="x2many_counter" string="things"/>
```

many2many_binary widgeten

Enligt en notering i dokumentationen till Odoo:

Widget **for** (many2many field) to upload one **or** more file **in** same time **and** display **in** list. The user can delete his files.

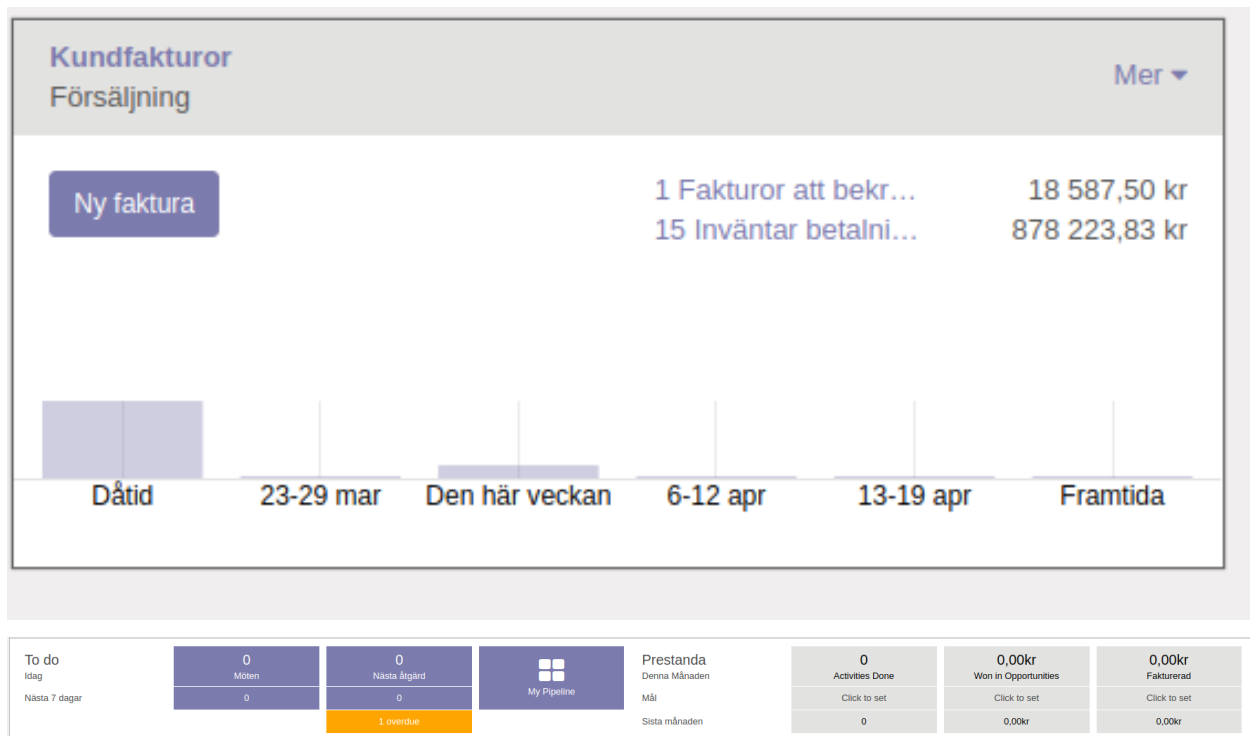


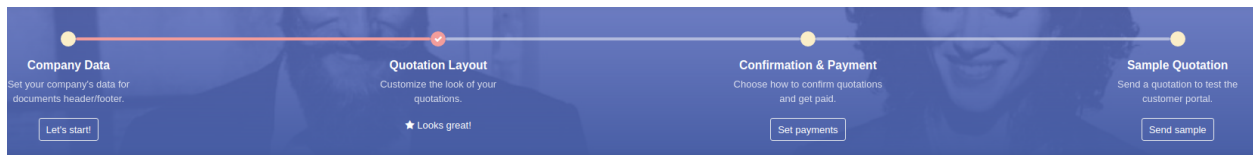
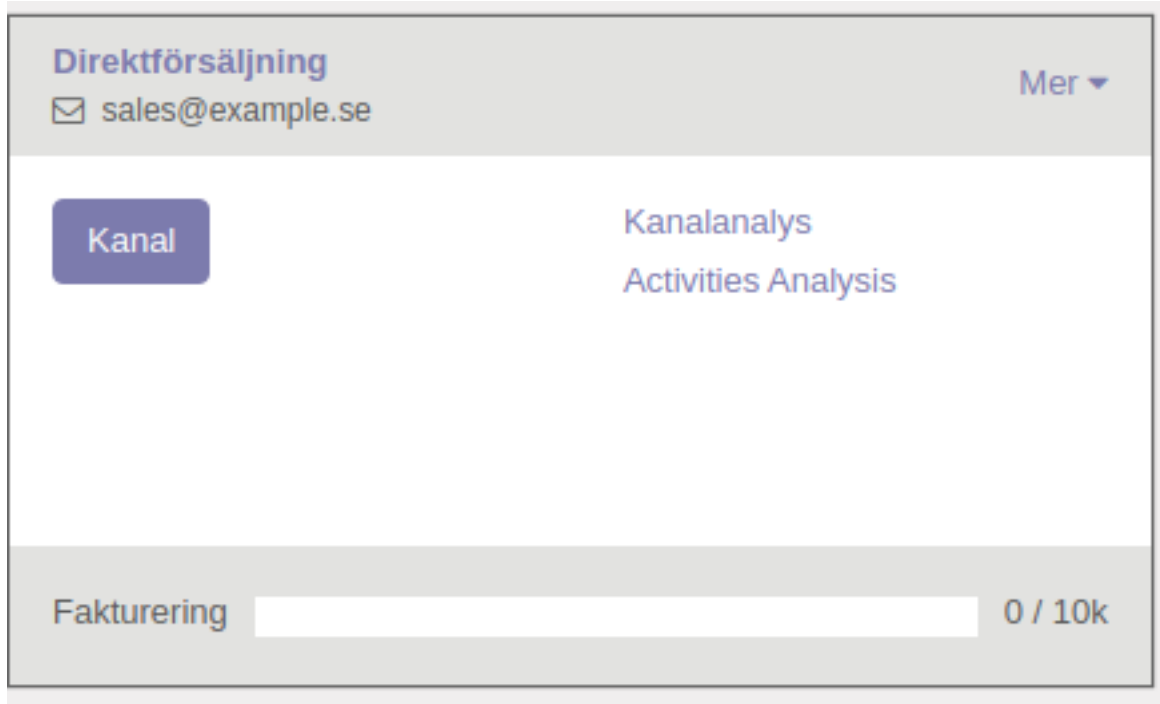
Exempel

```
<field name="field_name" widget="many2many_binary" string="Attach a file"/>
```

6.2 Kanban Widgets

The current KanbanRecord(), can be used to fetch some meta-information. These methods are also available directly in the template context and don't need to be accessed via widget





6.3 List Widgets

6.3.1 progressbar

Displays `float` fields as a progress bar.

Example

```
<XXXXXXXXXXXXXXXXX/>
```

6.3.2 many2onebutton

Replaces the `many2one` field's value by a checkmark if the field is filled, and a cross if it is not.

Example

```
<XXXXXXXXXXXXXXXXX/>
```

6.3.3 handle

For `sequence` fields, instead of displaying the field's value just displays a drag&drop icon.

Example

```
<XXXXXXXXXXXXXXXX/>
```

6.4 Pivot Widgets

In Pivot view a `field` can have a `widget` attribute to dictate its format. The `widget` should be a field formatter, of which the most interesting are `date`, `datetime`, `float_time`, and `monetary`.

Example

```
<pivot string="Timesheet">
  <field name="employee_id" type="row"/>
  <field name="date" interval="month" type="col"/>
  <field name="unit_amount" type="measure" widget="float_time"/>
</pivot/>
```

6.5 Calendar Widgets

The current `KanbanRecord()`, can be used to fetch some meta-information. These methods are also available directly in the template context and don't need to be accessed via widget `getColor` to convert in a color integer `getAvatars` to convert in an avatar image `displayFields` list of not invisible fields.

6.6 Field Widgets

Each field type is displayed in the form with the appropriate default widget. But additional alternative widgets are available to be used.

For text fields, we have the following widgets:

- **email** is used to make the email text an actionable “mail-to” address.
- **url** is used to format the text as a clickable URL.
- **html** is used to render the text as HTML content; in edit mode, it features a WYSIWYG editor to allow for the formatting of the content without the need for using the HTML syntax.

For numeric fields, we have the following widgets:

- **handle** is specifically designed for sequence fields in list views and displays a handle that allows you to drag lines to a custom order.
- **float_time** formats a float field with time quantities as hours and minutes. **monetary** displays a float field as the currency amount. It expects a `currency_id` companion field, but another field name can be provided with `options=" { 'currency_field': 'currency_id' }"`.
- **progressbar** presents a float as a progress percentage and can be useful for fields representing a completion rate.
- **percentage** and **percentpie** are widgets to use with float fields.

For relational and selection fields, we have these additional widgets:

- **many2many_tags** displays values as a list of button-like labels.
- **many2many_checkboxes** displays the selectable values as a list of checkboxes.

- **selection** uses the selection field widget for a many-to-one field.
- **radio** displays the selection field options using radio buttons.
- **priority** represents the selection field as a list of clickable stars. The selection options are usually numeric digits.
- **state_selection** shows a semaphore light for the Kanban state selection list. The normal state is represented in gray, done is represented in green, and any other state is represented in red.
- **pdf_viewer** is for binary fields (introduced in Odoo 12).

CHAPTER 7

Datakatalog

CHAPTER 8

Geany EDI

Tips och trix