Alexander Zehnter
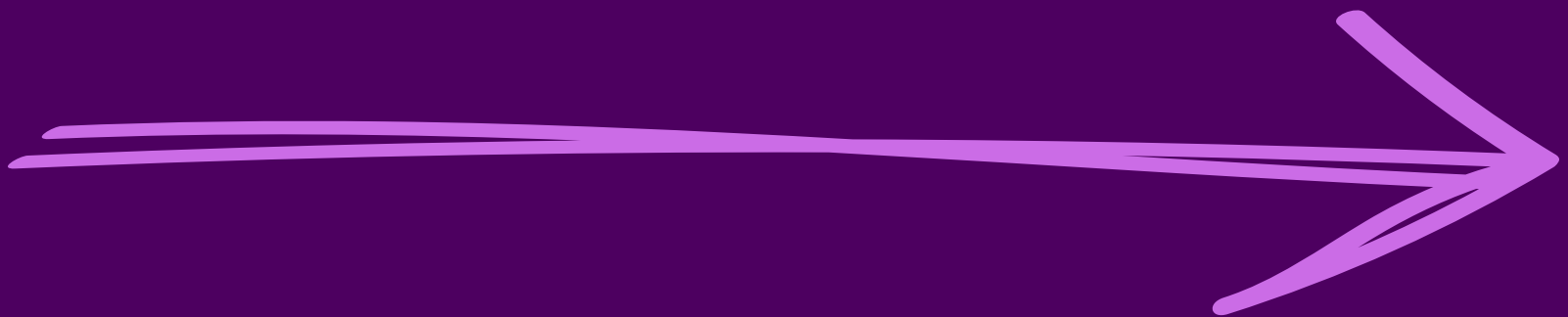
Set Defaults in Odoo

to speed up document creation

Let's assume all your customers have the same payment terms.

That is 15 Days.

Wouldn't you like skipping entering that field while creating a new invoice?

Here's how it works

Activate Developer Mode

Search...

SAVE **DISCARD**

⚙ General Settings

📄 Accounting

🗄 Documents

Profiling enabled until
Enable the profiling tool. Profiling may impact performance while being active.

Developer Tools

Activate the developer mode (with assets)
Activate the developer mode (with tests assets)
Deactivate the developer mode
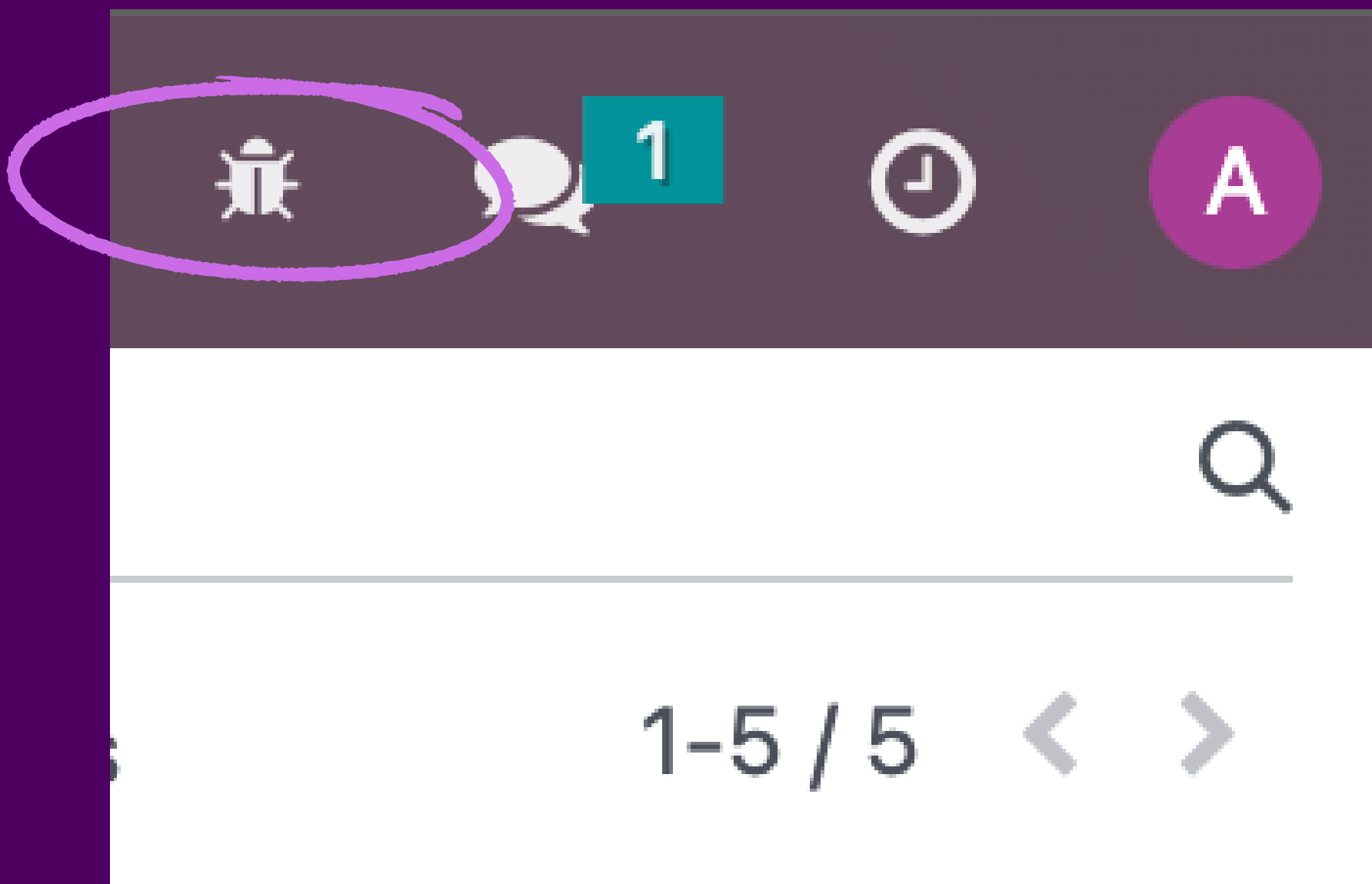Load demo data

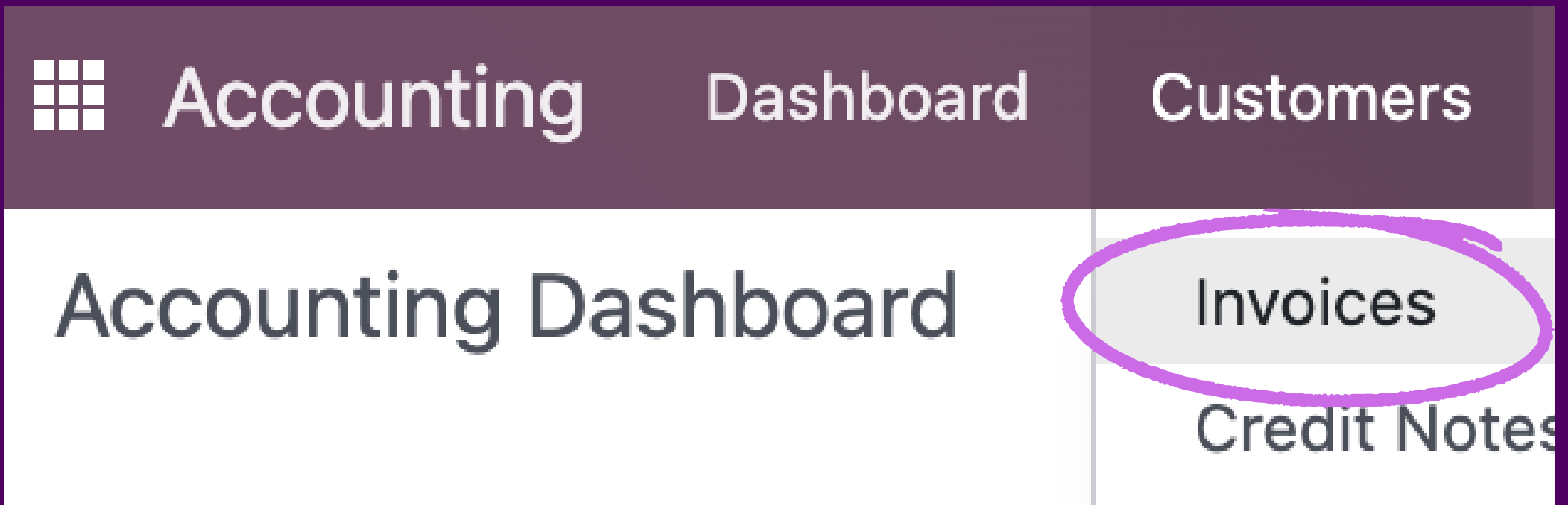**About**

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Odoo saas~16.1+e (Enterprise Edition)

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You should see the bug in the upper right corner

Head to invoices

▦ Accounting	Dashboard	Customers
Accounting Dashboard		Invoices
		Credit Notes

Create a new invoice

▦ Accounting	Dashboard

Invoices

NEW UPLOAD ⤓
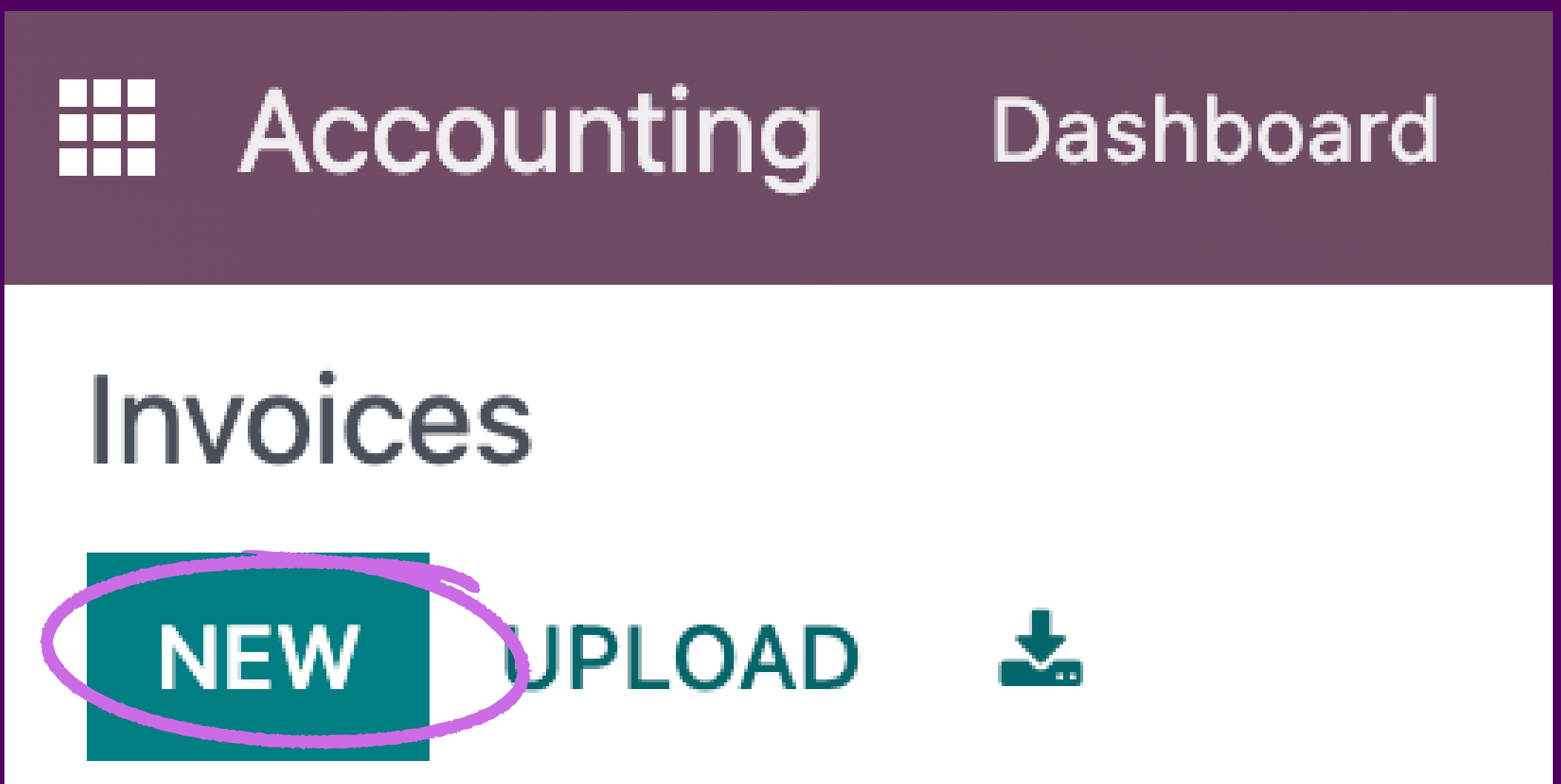
Choose Payment Terms 15 Days

Customer Invoice

Draft

Customer [?]

Invoice Date [?]

Payment Reference [?]

Due Date [?]   03/12/2023   or   Terms
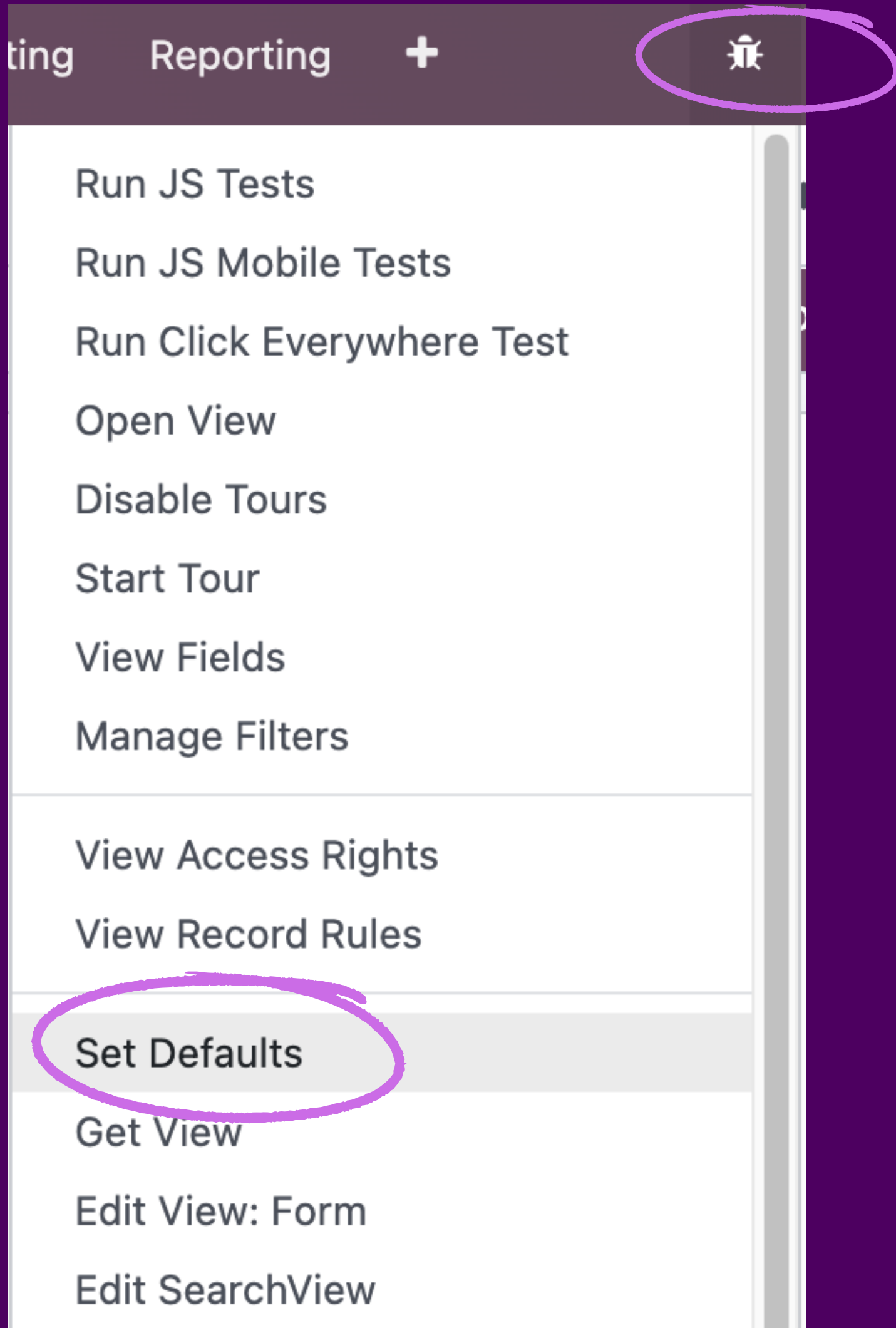
Journal [?]   Customer Invoices   Immediate Payment

                                                                     15 Days

Click on the Bug and click Set Defaults

ting   Reporting   +   🐛

Run JS Tests

Run JS Mobile Tests

Run Click Everywhere Test

Open View

Disable Tours

Start Tour

View Fields

Manage Filters

View Access Rights

View Record Rules

Set Defaults

Get View

Edit View: Form

Edit SearchView

In the Popup, choose the following:

Set Defaults

Default:	Payment Terms = 15 Days
Condition:	Type=Customer Invoice
⦿ Only you	
○ All users	

CLOSE   SAVE DEFAULT

Then click Save Default

The next time you create a new invoice the payment terms are directly set to your default

Customer Invoice

INV/2023/00001|

Customer **?**

Invoice Date **?**

Payment Reference **?**

Payment terms **?**   15 Days

Journal **?**   Customer Invoices

Thanks for Reading!

What would you set to default in your processes?

Did you enjoy this content?

Questions?

Feel free to connect with me on LinkedIn

linkedin.com/10ter