

Odoo AI Assistant - User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, please feel free to contact us via support@magenest.com

By: Magenest | Support Portal:

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Odoo AI Assistant User Guide

1. Introduction

Odoo AI Assistant is an integrated Odoo module developed by Magenest that allows users to interact with AI directly within the Odoo interface.

Administrators can connect an AI provider, create AI Agents, select the appropriate language model, and configure supported Question Types. Users can then open a chat window and submit questions without leaving Odoo.

The current version responds to predefined Question Types. If a question has not been configured, the assistant will notify the user that the requested question is not supported.

Highlight Features

For Admin

- Install and activate the AI Assistant modules directly from Odoo Apps.
- Connect Odoo to an AI provider using an API key.
- Create multiple AI Agents for different use cases.
- Select the LLM provider and model for each AI Agent.
- Manage predefined Question Types and review their descriptions and examples.
- Create and manage user accounts with suitable access rights.

For User

- Access AI Assistant directly from the Odoo application menu.
- Open a dedicated chat window for a selected AI Agent.
- Submit supported questions without switching to another platform.
- Receive AI-generated responses within the Odoo interface.
- Review available Question Types and sample questions before starting a conversation.

System Requirements

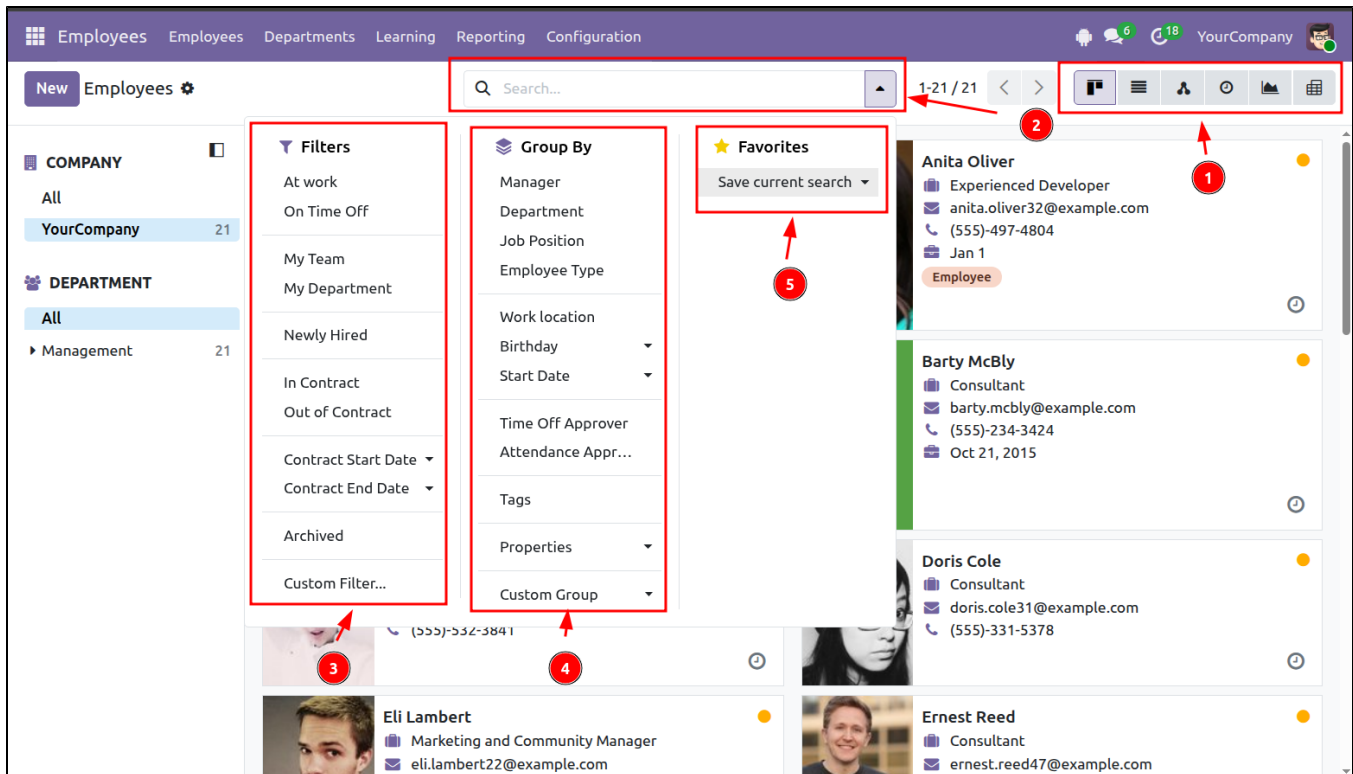
Before installing and configuring Odoo AI Assistant, make sure the following requirements are met:

- An Odoo environment compatible with the AI Assistant modules.
- Administrator access to Odoo Settings and Apps.
- The required AI Assistant modules are installed and activated.
- A valid API key for the selected AI provider, such as Google Gemini.
- Internet access from the Odoo server to the selected AI service.
- At least one AI Agent has been created.
- The required Question Types have been configured before users begin chatting.

General System Operations

1. Switching Views, Searching, and Applying Filters

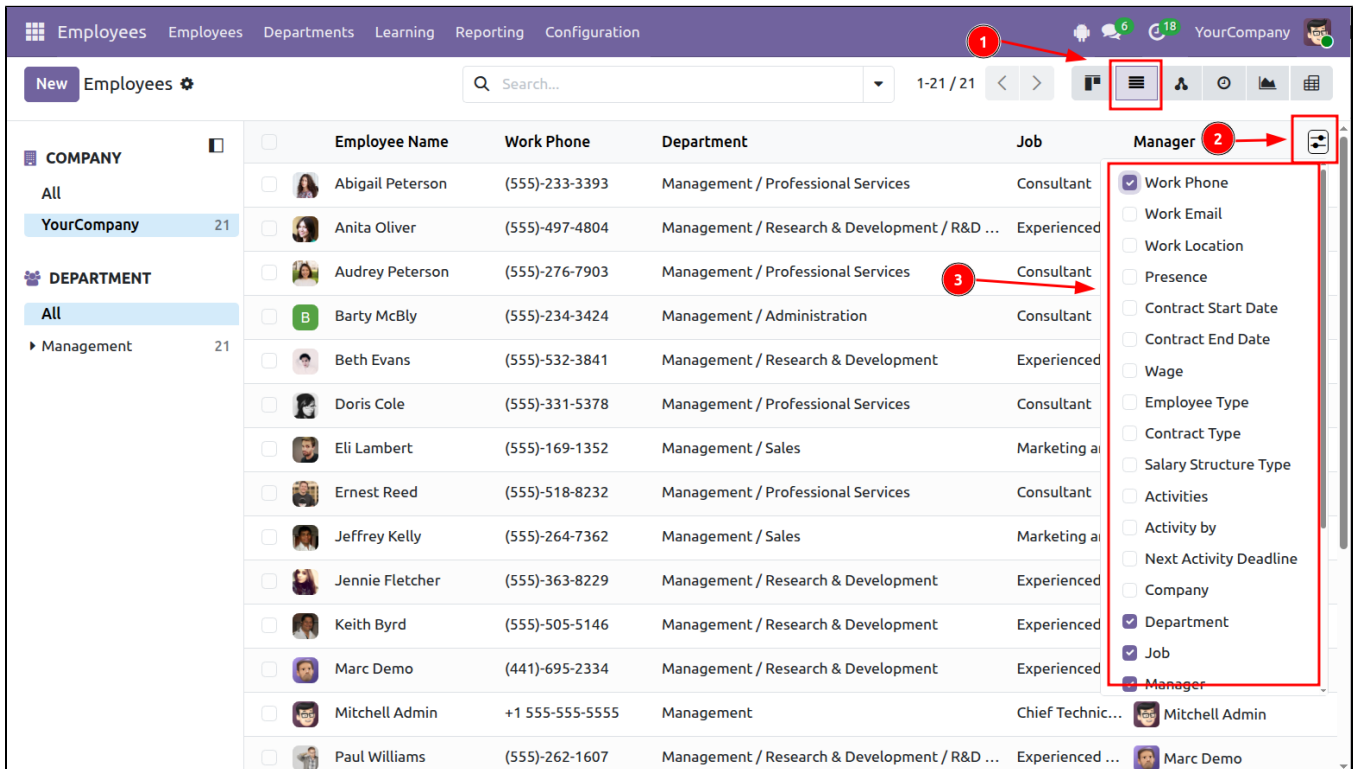
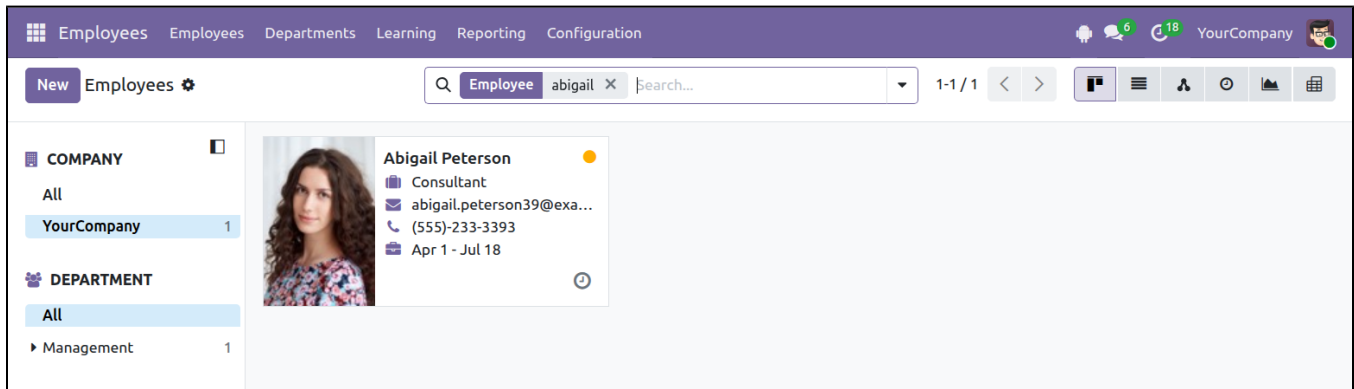
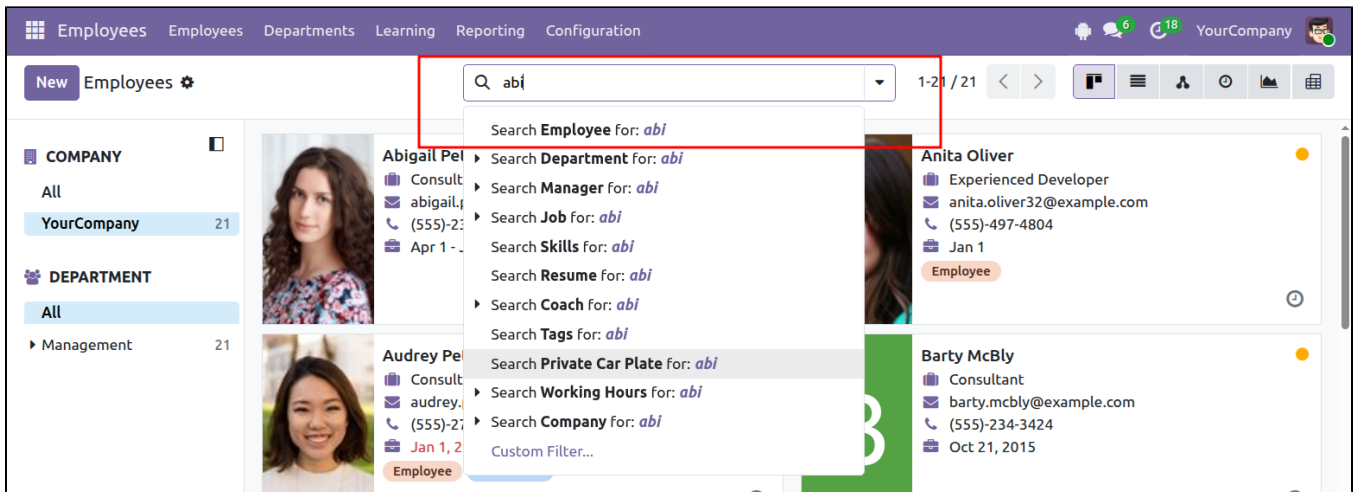
From any screen, users can switch between the available views by selecting the corresponding icon in the view switcher at the top-right corner (1).



To filter or group records, click the search bar (2) and choose the relevant options. You can:

- Use an existing filter or group.
- Create a custom filter.
- Group records by multiple levels.
- Save the current search to your Favorites (5).

When you enter a keyword in the search bar, Odoo displays the fields that can be searched. Select the appropriate field to find records that match the keyword.



In List view (1), click the column settings icon (2) to choose which columns are shown or hidden.

Saving the Current Search

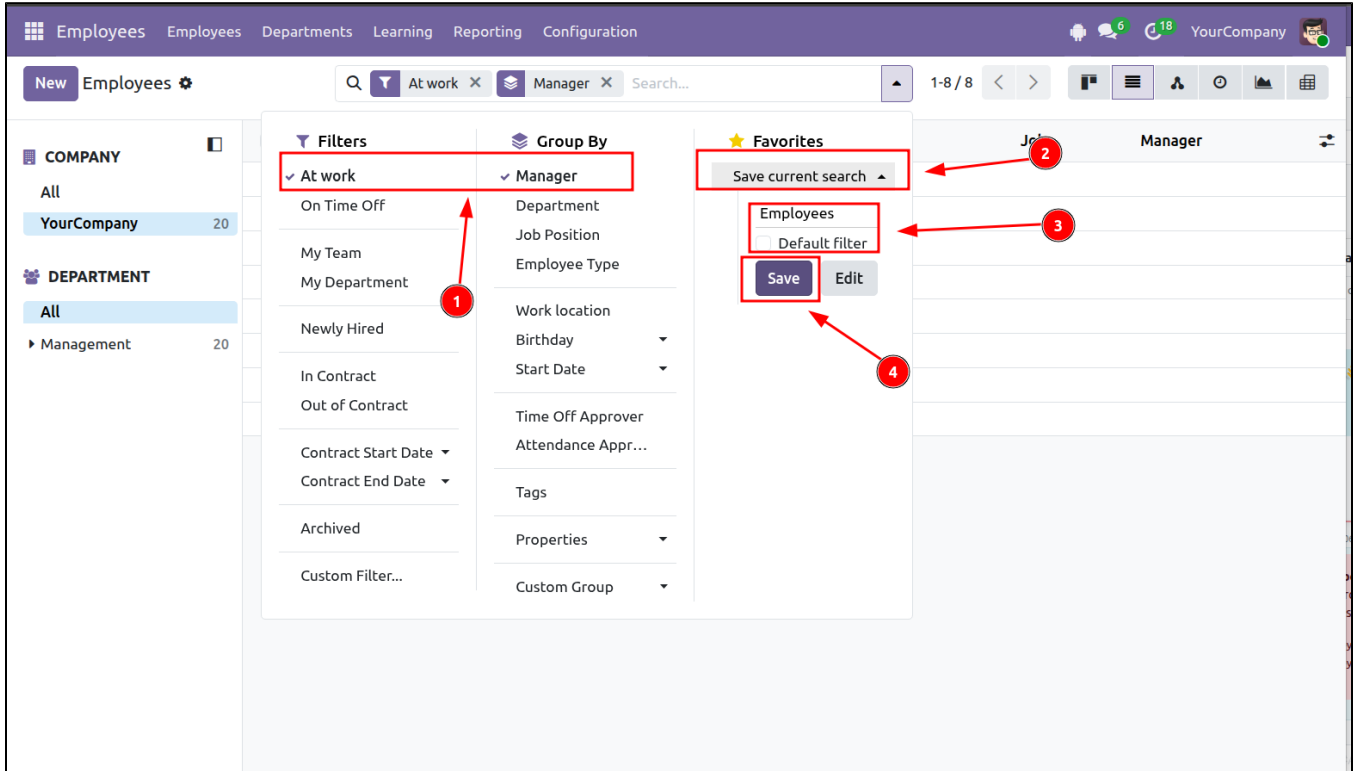
Step 1: Apply the filters or grouping options you need (1). You can use the available options or create your own.

Step 2: Select **Save current search** (2).

Step 3: Enter a name for the saved search.

- Select **Use by default** to apply it automatically whenever you open the view.
- Select **Share** to make it available to other users.

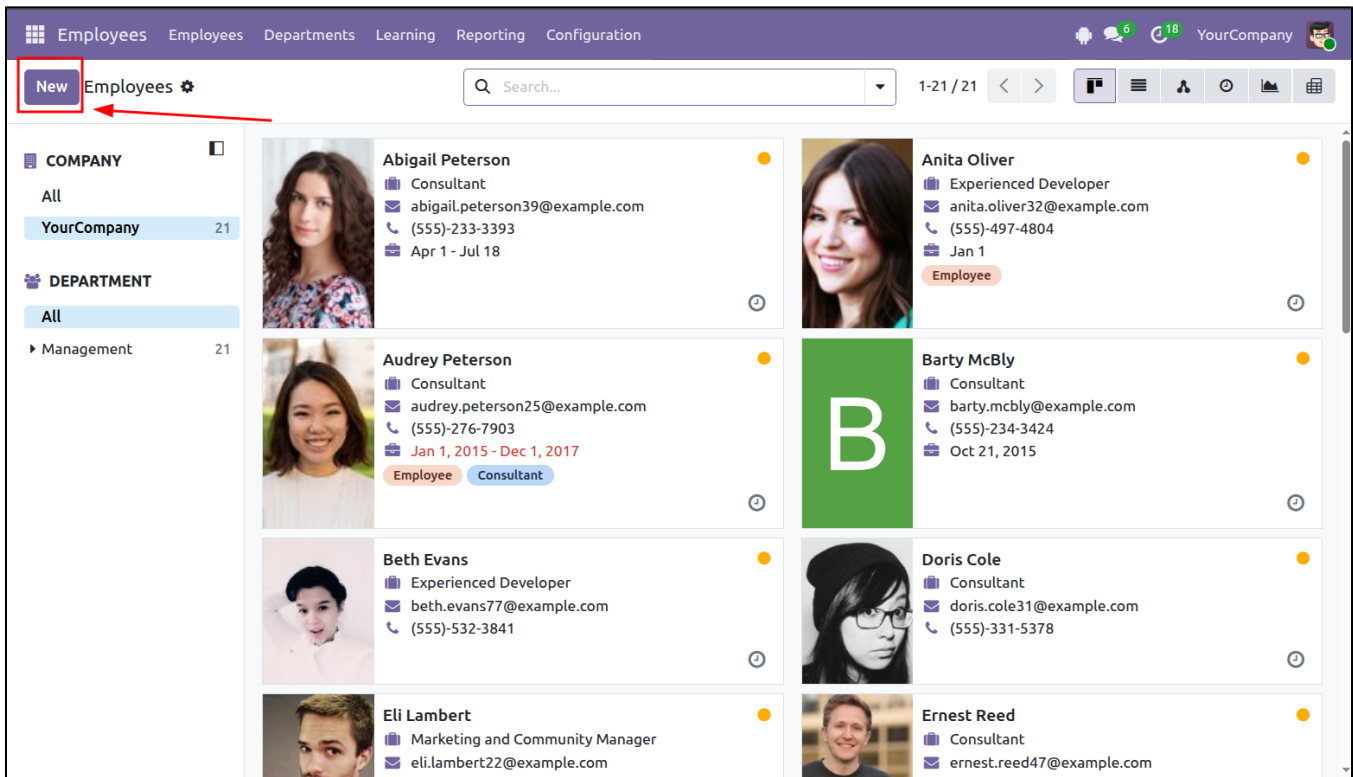
Step 4: Click **Save** (4).



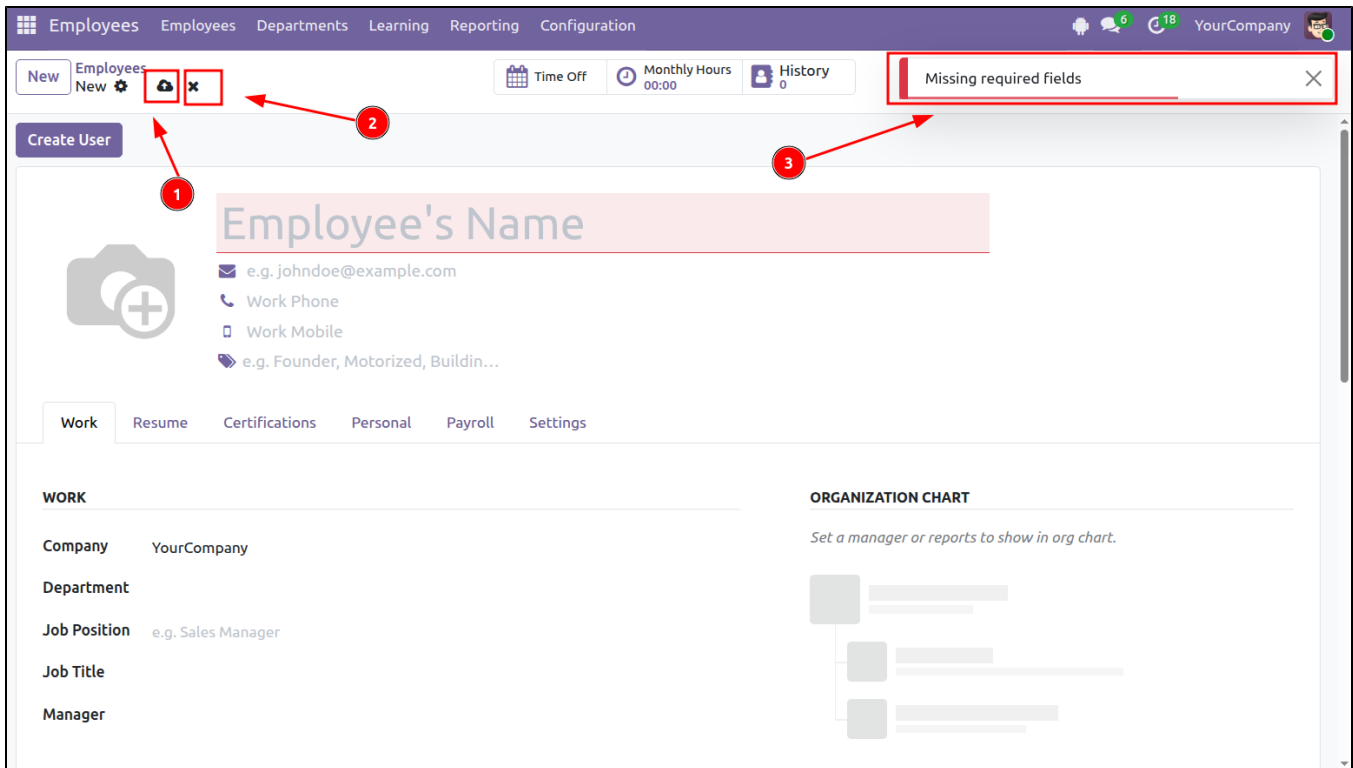
2. Creating a New Record

2.1. Creating a Record Manually

Step 1: Open the relevant section, such as Employees, and click **New**.



Step 2: Complete the required information, then click **Save** (1).



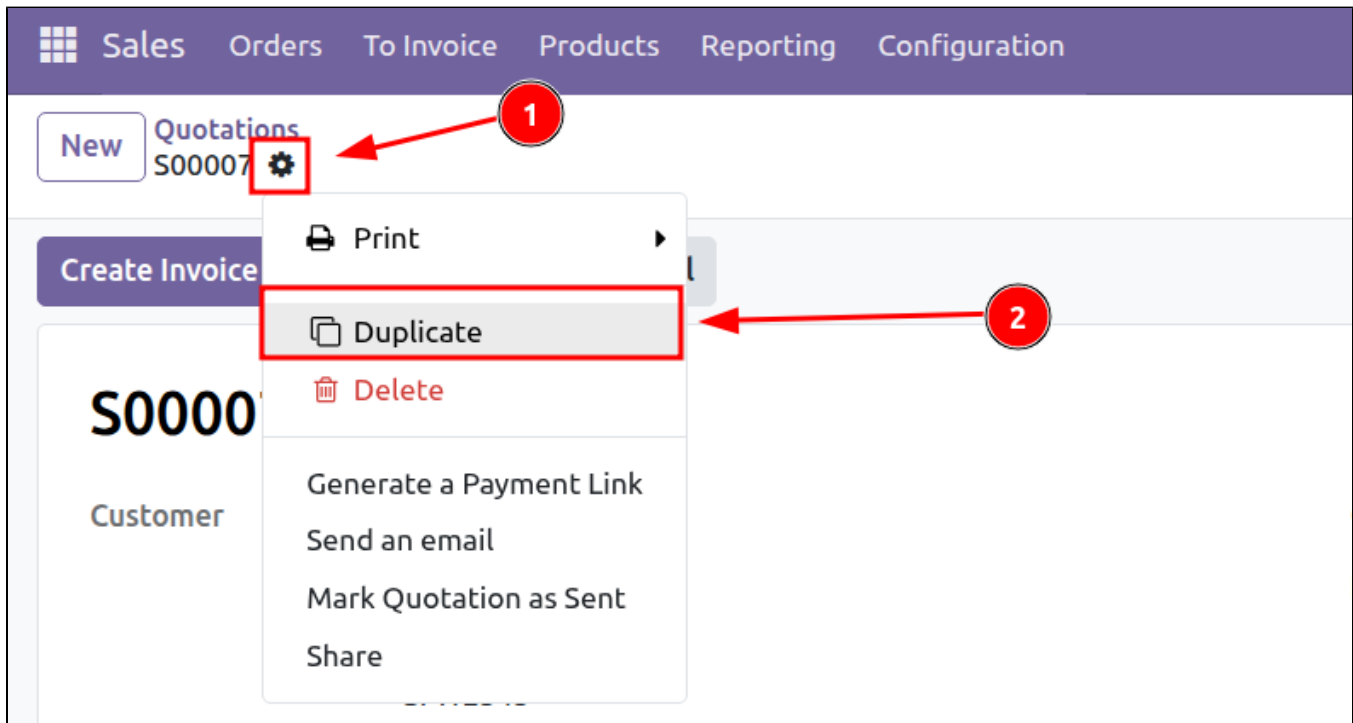
- Click **Discard** (2) to cancel the record and return to the previous screen.
- If any required fields are left blank, Odoo will highlight them and prevent the record from being saved (3).

2.2. Duplicating an Existing Record

You can create a new record by copying an existing one.

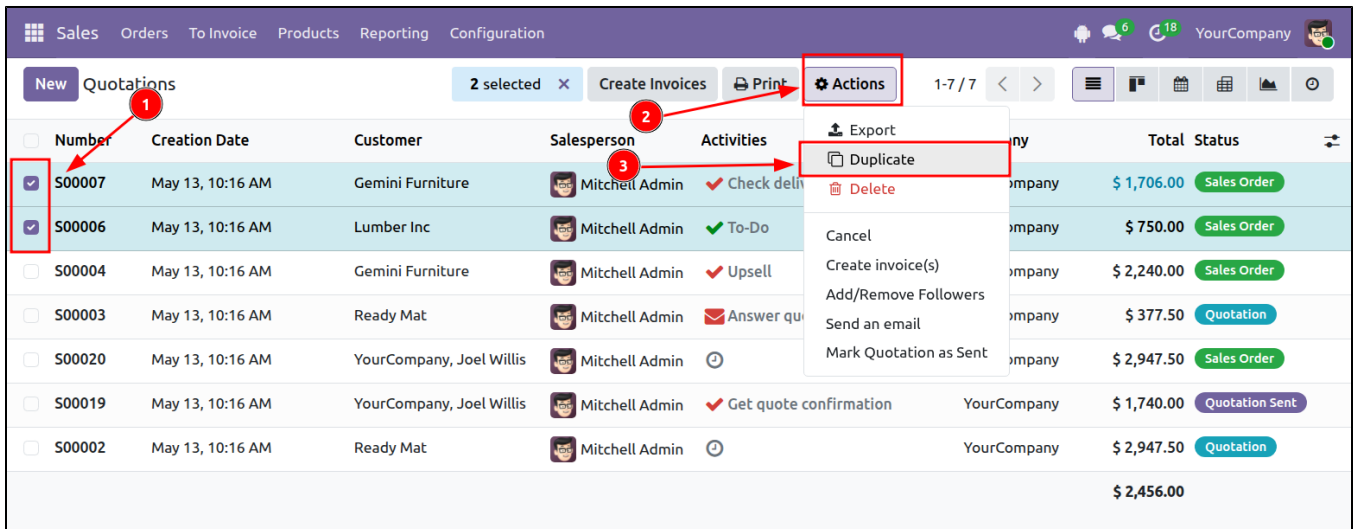
To duplicate a record from Form view:

1. Open the record.
2. Click the gear icon (1).
3. Select **Duplicate** (2).



To duplicate one or more records from List view:

1. Select the records you want to copy.
2. Click **Actions** (2).
3. Select **Duplicate** (3).



3. Editing a Record

Open the record you want to update and make the necessary changes.

Click **Save** to apply the changes, or **Discard** to cancel them.

Sales Orders To Invoice Products Reporting Configuration

Quotations S00007

Create Invoice Send Preview Cancel

Quotation Quotation Sent Sales Order

S00007

Customer Gemini Furniture
Via Industria 21
Serravalle 47899
San Marino
SM12345

Order Date May 13, 10:16 AM

Payment Terms 15 Days

Quotation Template SM12345

Order Lines Quote Builder Other Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
[FURN_6667] Acoustic Bloc Screens (Black) Noise-reducing panels for open spaces	5.00	0.00	0.00	295.00		\$ 1,475.00
Two-Seat Sofa (Linen) Two-Seater Sofa with Oak Wood Frame	1.00	0.00	0.00	173.00	0% Exports	\$ 173.00
[FURN_8888] Office Lamp	1.00	0.00	0.00	40.00		\$ 40.00
[FURN_7777] Office Chair Comfortable yellow chair for daily work	1.00	0.00	0.00	18.00		\$ 18.00

4. Deleting a Record

A record can be deleted from either Form view or List view.

Delete from Form View

Open the record, click the gear icon, and select **Delete**.

Sales Orders To Invoice Products Reporting Configuration

Quotations S00007

Create Invoice Print Duplicate

Quotation Quotation Sent Sales Order

S00007

Customer Gemini Furniture
Via Industria 21
Serravalle 47899
San Marino
SM12345

Order Date May 13, 10:16 AM

Payment Terms Immediate

Quotation Template SM12345

Order Lines Quote Builder Other Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
[FURN_6667] Acoustic Bloc Screens (Black) Noise-reducing panels for open spaces	5.00	0.00	0.00	295.00		\$ 1,475.00
Two-Seat Sofa (Linen) Two-Seater Sofa with Oak Wood Frame	1.00	0.00	0.00	173.00	0% Exports	\$ 173.00
[FURN_8888] Office Lamp	1.00	0.00	0.00	40.00		\$ 40.00
[FURN_7777] Office Chair Comfortable yellow chair for daily work	1.00	0.00	0.00	18.00		\$ 18.00

Delete from List View

Select the records you want to remove, then go to: **Actions > Delete**

The screenshot shows the Odoo Quotations list view. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The left sidebar has a 'New' button and a 'Quotations' tab. The main area shows a list of quotations with columns: Number, Creation Date, Customer, Salesperson, Activities, Company, Total, and Status. Two quotations are selected (S00007 and S00006). The 'Actions' button is highlighted with a red box and a red arrow labeled '1'. The 'Delete' option in the Actions dropdown menu is also highlighted with a red box and a red arrow labeled '2'.

Number	Creation Date	Customer	Salesperson	Activities	Company	Total	Status
☒ S00007	May 13, 10:16 AM	Gemini Furniture	Mitchell Admin	✓ Check deli	Company	\$ 1,706.00	Sales Order
☒ S00006	May 13, 10:16 AM	Lumber Inc	Mitchell Admin	✓ To-Do	Company	\$ 750.00	Sales Order
☐ S00004	May 13, 10:16 AM	Gemini Furniture	Mitchell Admin	✓ Upsell	Company	\$ 2,240.00	Sales Order
☐ S00003	May 13, 10:16 AM	Ready Mat	Mitchell Admin	✗ Answer qu	Company	\$ 377.50	Quotation
☐ S00020	May 13, 10:16 AM	YourCompany, Joel Willis	Mitchell Admin	⌚	Company	\$ 2,947.50	Sales Order
☐ S00019	May 13, 10:16 AM	YourCompany, Joel Willis	Mitchell Admin	✓ Get quote confirmation	YourCompany	\$ 1,740.00	Quotation Sent
☐ S00002	May 13, 10:16 AM	Ready Mat	Mitchell Admin	⌚	YourCompany	\$ 2,947.50	Quotation
						\$ 2,456.00	

Odoo will ask you to confirm the action.

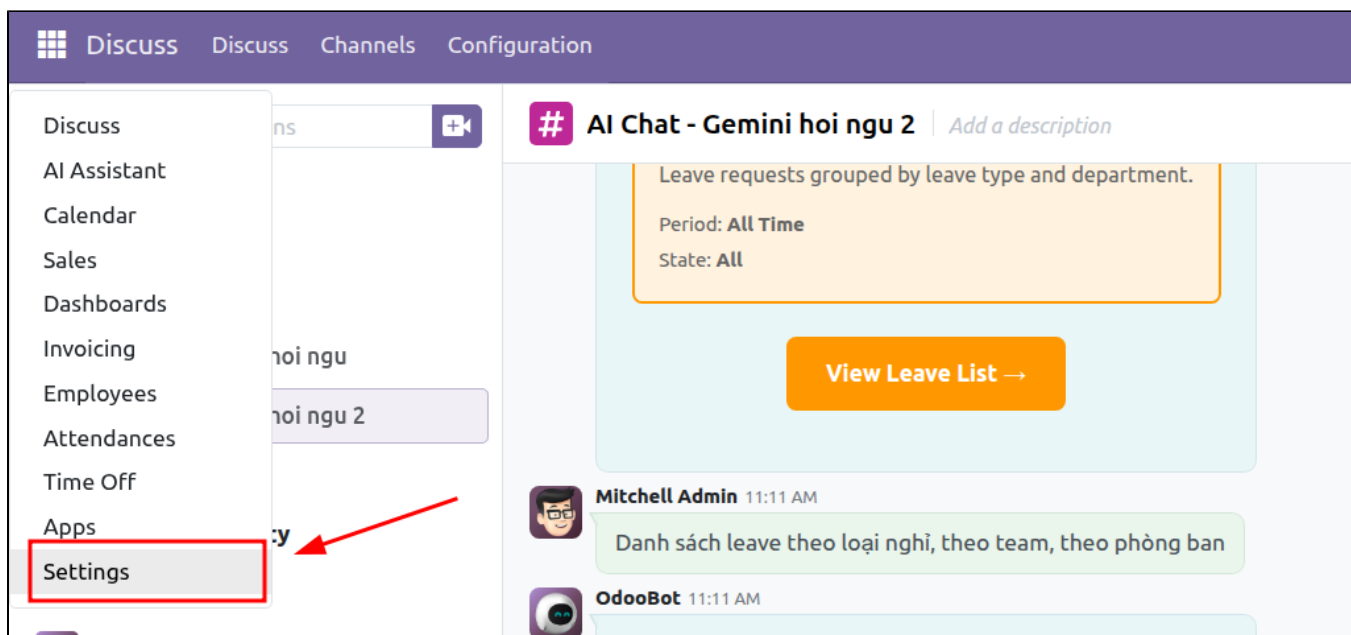
- Click **Delete** to remove the record.
- Click **No, keep it** to cancel.

The screenshot shows the same Odoo Quotations list view, but with a confirmation dialog box open. The dialog box has the title 'Bye-bye, record!' and the text 'Are you sure you want to delete these records?'. It has two buttons: 'Delete' and 'No, keep it'. The dialog box is highlighted with a red box.

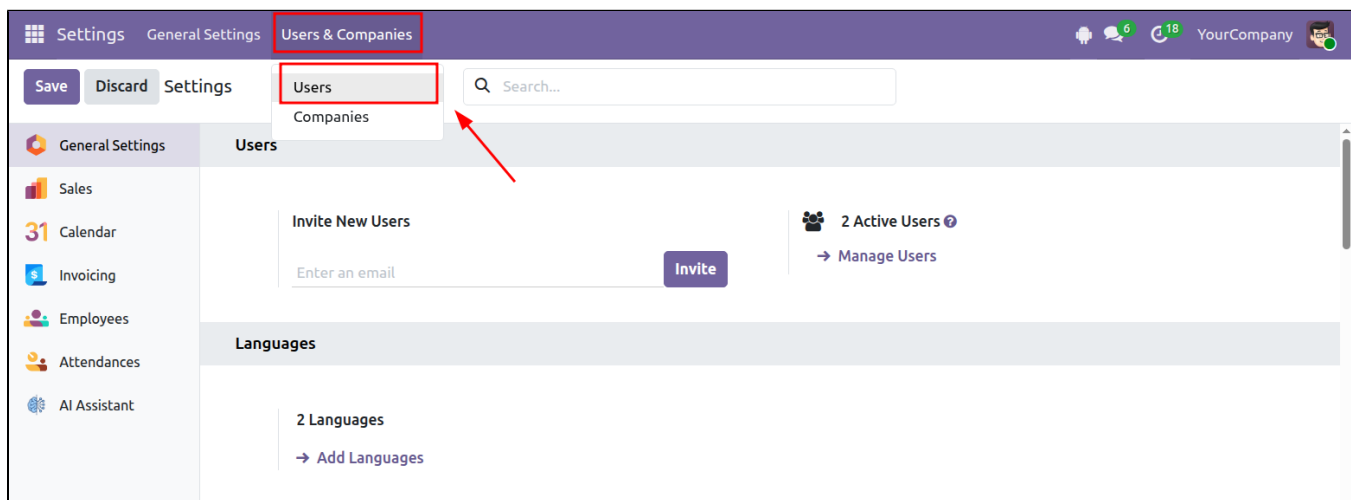
Number	Creation Date	Customer	Salesperson	Activities	Company	Total	Status
☒ S00007	May 13, 10:16 AM	Gemini Furniture	Mitchell Admin	✓ Check delivery requirements	YourCompany	\$ 1,706.00	Sales Order
☒ S00006	May 13, 10:16 AM	Lumber Inc	Mitchell Admin	✓ To-Do	YourCompany	\$ 750.00	Sales Order
☐ S00004	May 13, 10:16 AM	Gemini Furniture	Mitchell Admin	✓ Upsell	YourCompany	\$ 2,240.00	Sales Order
☐ S00003	May 13, 10:16 AM				pany	\$ 377.50	Quotation
☐ S00020	May 13, 10:16 AM				pany	\$ 2,947.50	Sales Order
☐ S00019	May 13, 10:16 AM				pany	\$ 1,740.00	Quotation Sent
☐ S00002	May 13, 10:16 AM				pany	\$ 2,947.50	Quotation
						\$ 2,456.00	

5. Creating a User in Odoo Community

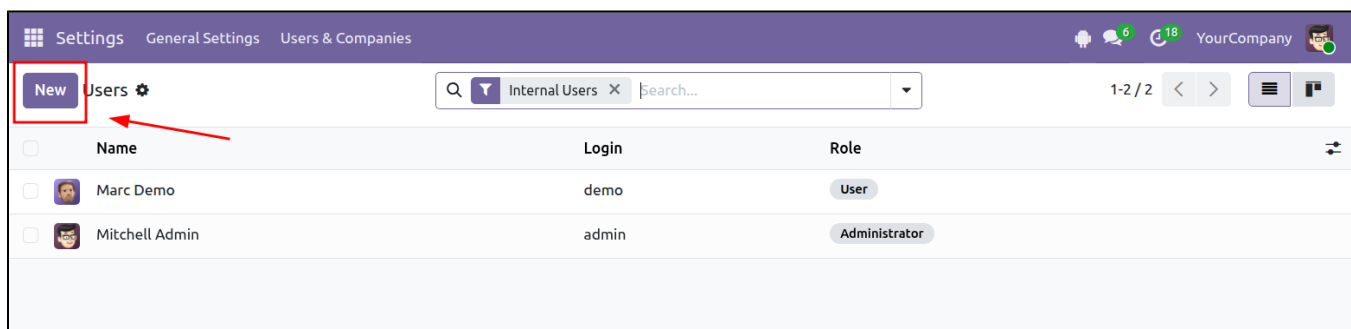
Step 1: Open **Settings**.



Step 2: Go to: **Users & Companies > Users**



Step 3: Click **New**.



Step 4: Enter the user's details.

- **Name:** Enter the user's full name as it should appear in Odoo.
- **Email:** Enter the email address the user will use to sign in and receive system notifications.
- **User Type:** Choose the option that best matches the user's role.
 - **Internal User:** Select this option for employees who need access to internal Odoo applications and management features, such as HR, Attendance, Time Off, Payroll, Accounting, or other business modules.
 - **Portal User:** Select this option for users who only need limited access to their own information, such as attendance records, leave requests, payslips, or overtime data. Portal users do not have administrative access.

- **Public User:** This option is intended for external visitors who do not sign in and can only access publicly available website content.

As a general guideline:

- Choose **Portal User** when an employee only needs to check attendance, submit leave requests, or view personal payroll and overtime information.
- Choose **Internal User** when the employee needs to manage, approve, or update records in HR, Attendance, Time Off, or other Odoo applications.

The screenshot shows the 'New' user creation form in Odoo. At the top, there's a navigation bar with 'Settings', 'General Settings', and 'Users & Companies'. Below it, a 'New' button is highlighted with a red box and arrow labeled '3'. The form has three input fields: 'Name' (with placeholder 'e.g. John Doe'), 'Login', and 'Phone'. A red box and arrow labeled '1' point to the 'Login' field. A red box and arrow labeled '2' point to a 'Missing required fields' error message at the top right. The form also includes tabs for 'Access Rights', 'Preferences', and 'Calendar'. Below the form, there are sections for 'ROLES' (Role: User/Administrator, Companies: YourCompany) and 'MASTER DATA' (Products, Contact, Export).

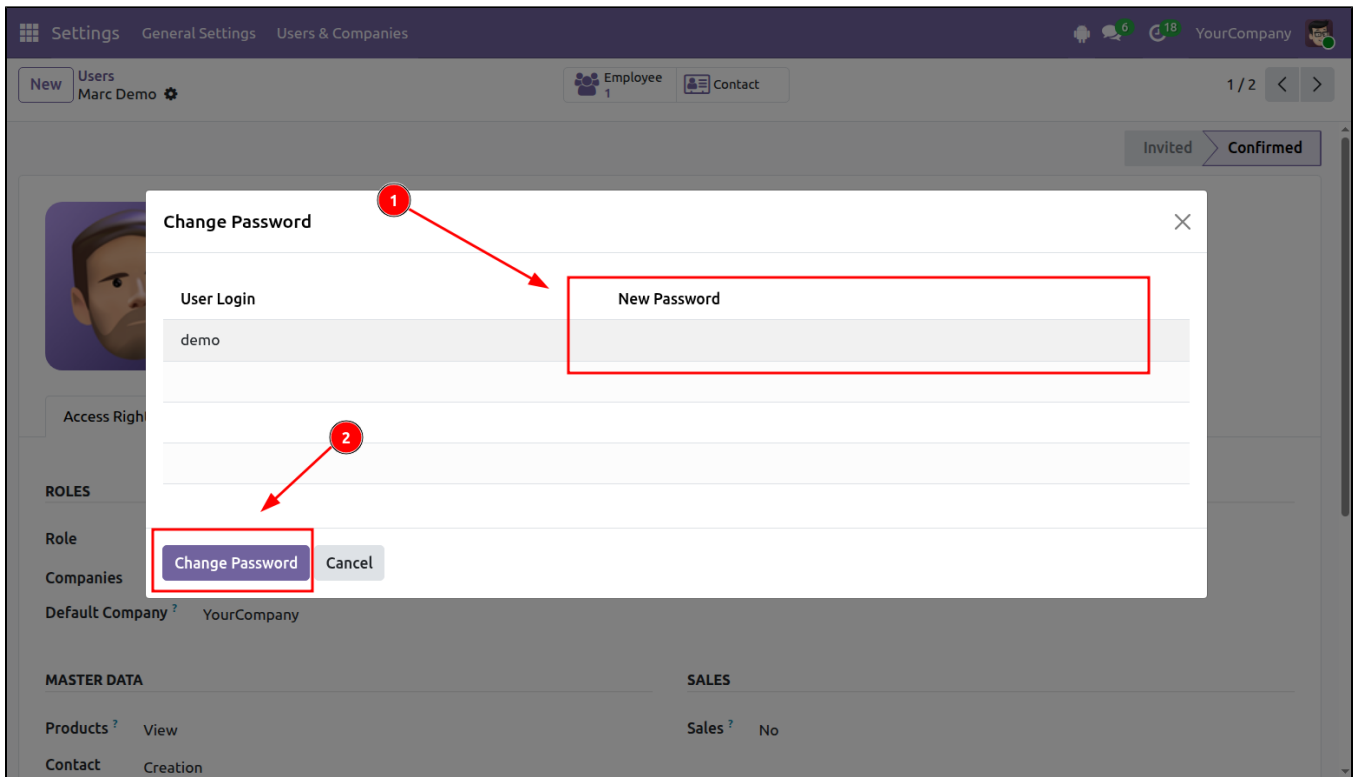
Step 5: Open the gear menu and select **Change Password**.

The screenshot shows the 'Marc Democ' user profile page. A red box and arrow labeled '1' point to the gear menu icon in the top left. The gear menu is open, showing options: Duplicate, Archive, Delete, Change Password, Disable two-factor authentication, Send Password Reset Instructions, and Privacy Lookup. A red box and arrow labeled '2' point to the 'Change Password' option. The page also shows a 'Work Mobile' button and tabs for 'Access Rights', 'Preferences', 'Calendar', and 'Security'.

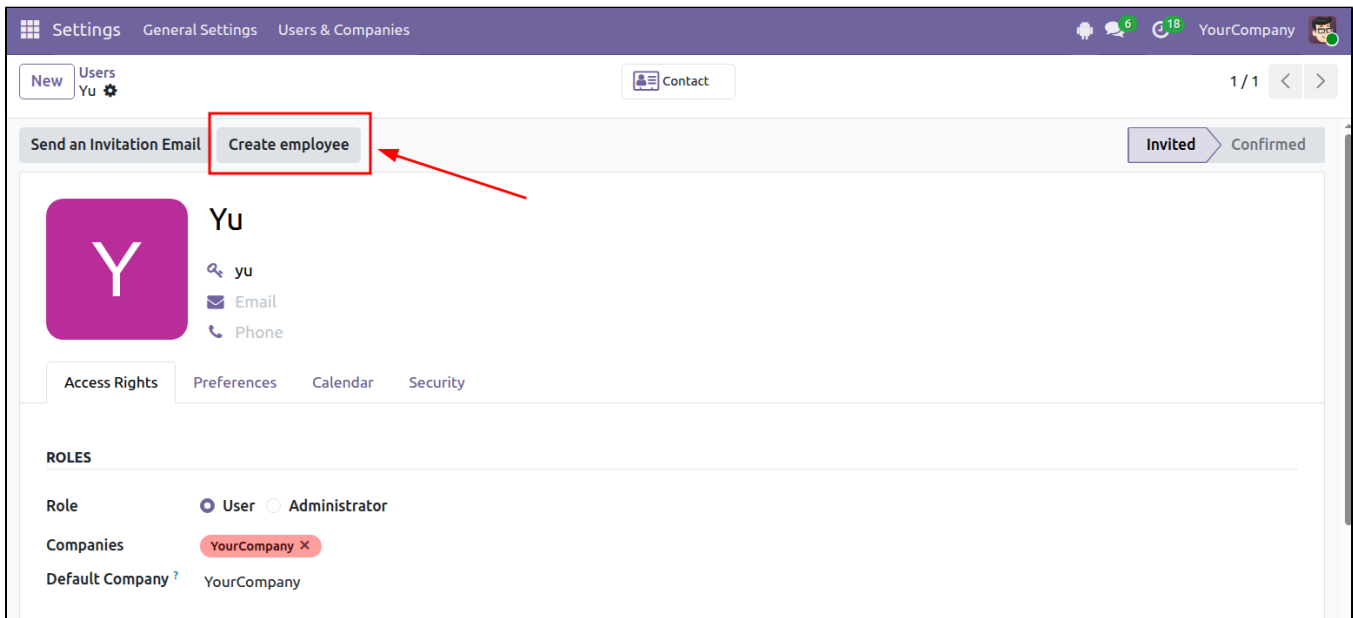
Step 6: Enter the new password in the **New Password** field, then click **Change Password** to save it.

After the password has been updated, the user can sign in with:

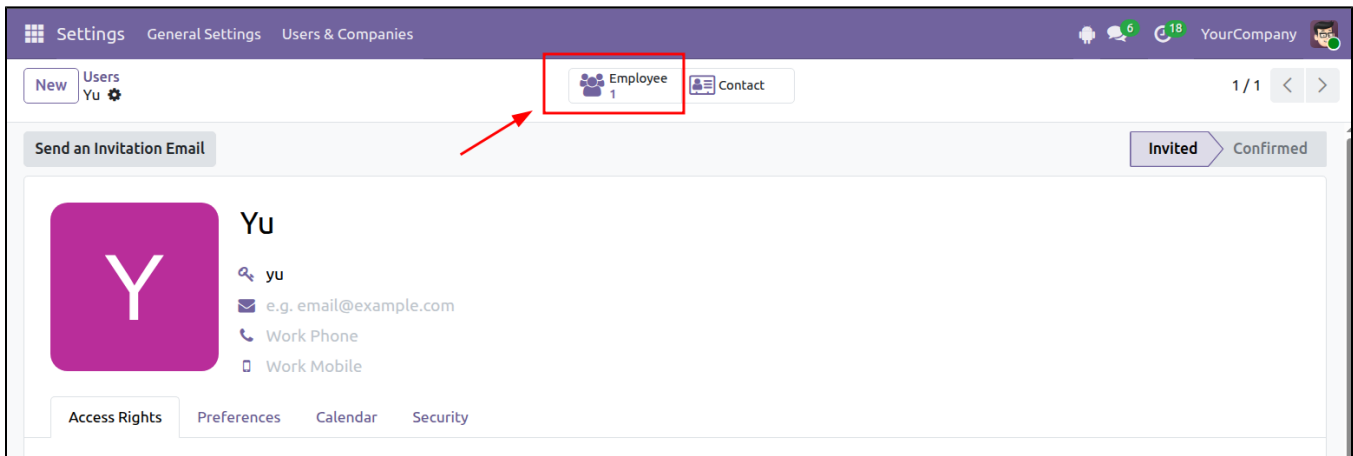
- **Username:** The login assigned to the user account.
- **Password:** The password entered in the previous step.



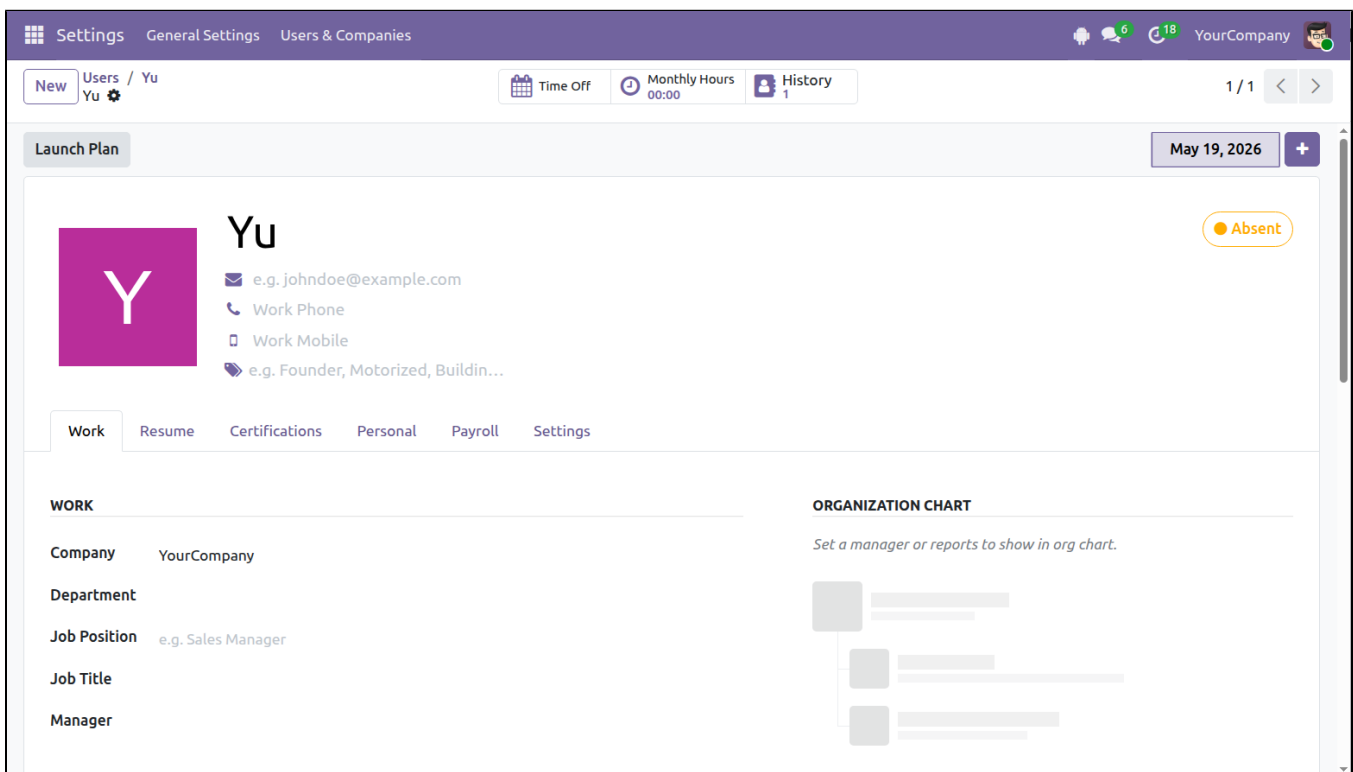
Step 7 (Optional): Click **Create Employee** to create an employee profile for the user.



Step 8: Once the employee profile has been created, click the employee icon to open it.

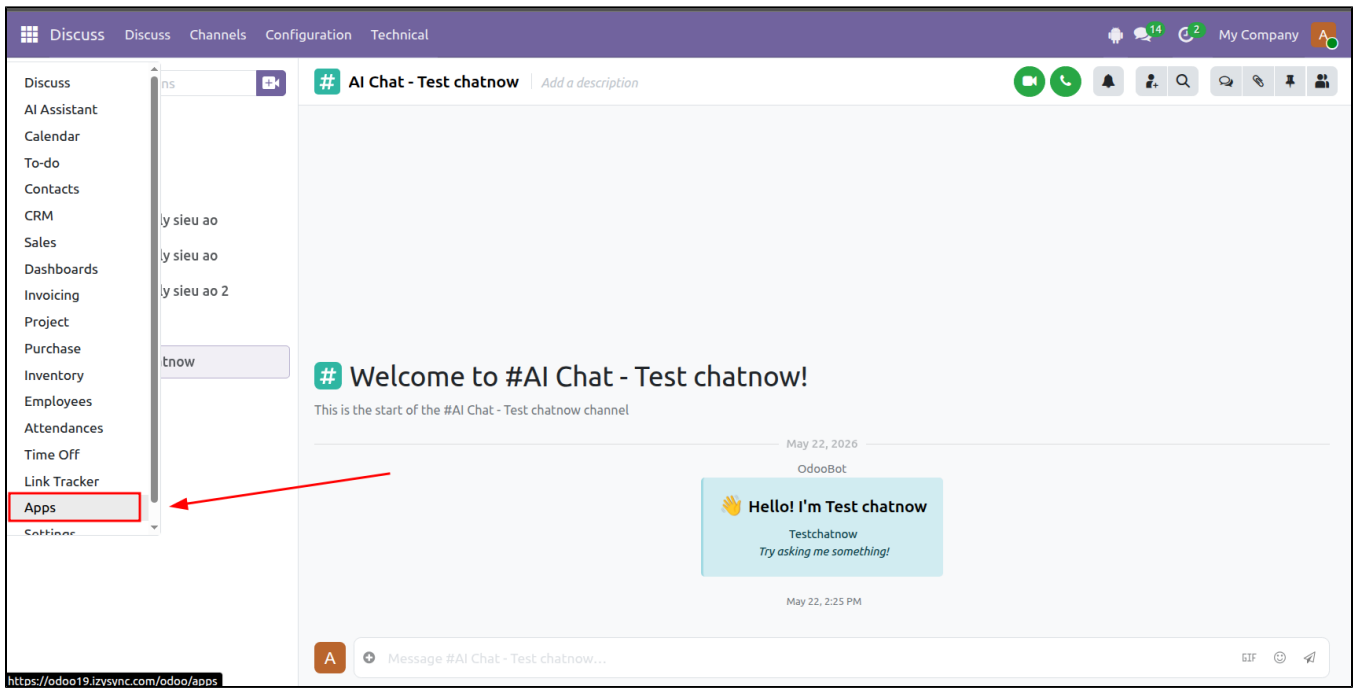


The new employee profile is automatically linked to the user account.

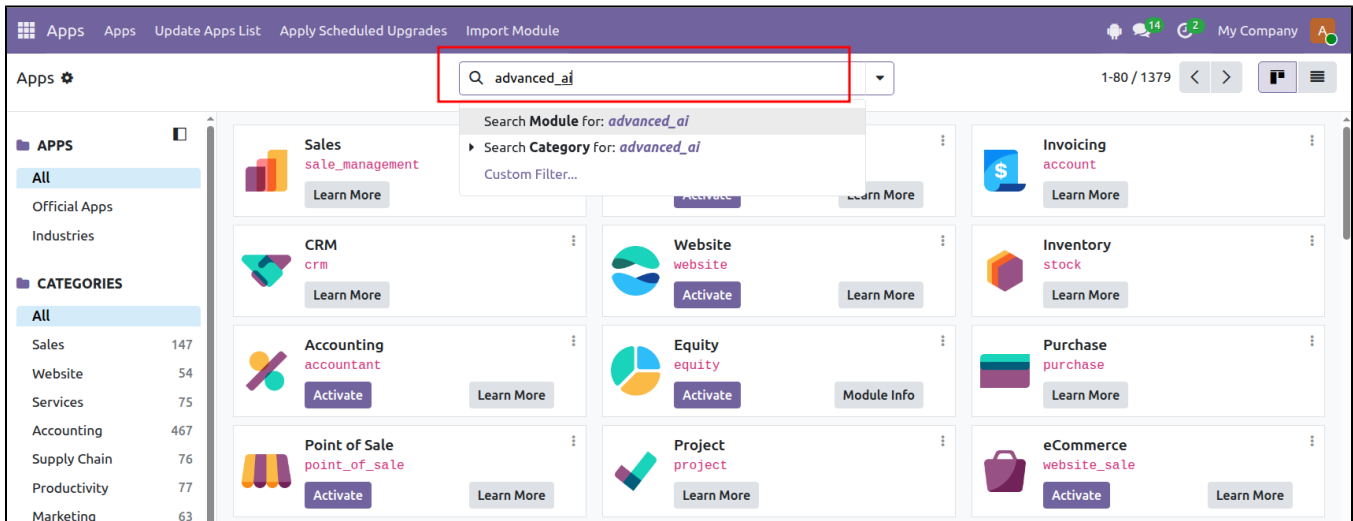


6. Activating the Required Modules

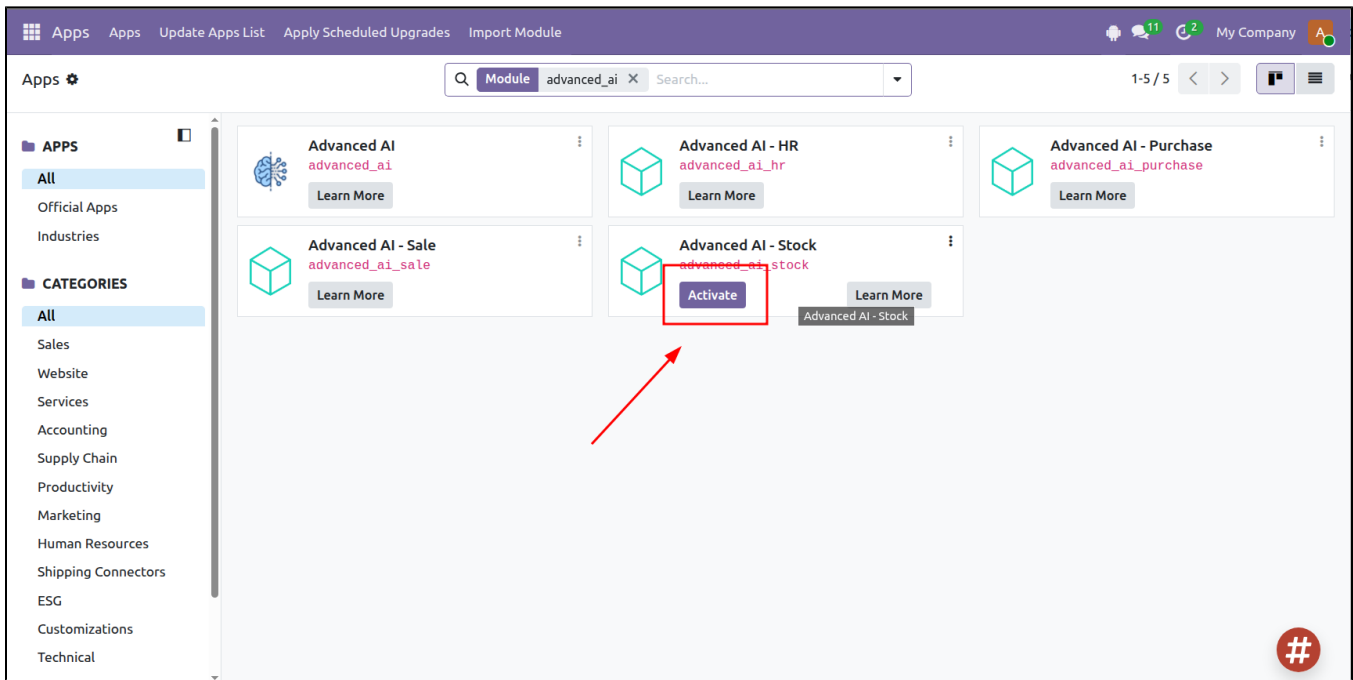
Step 1: Open Apps.



Step 2: Enter `advanced_ai` in the search bar.



Step 3: Locate the required module and click **Activate**.



I. AI Agent

Note: The AI Assistant can only answer questions that match the available Question Types. Refer to the Question Types section for examples. If a question has not been configured, the assistant will return a message indicating that the request is not supported.

Link: <https://aicypher.hungnamecommerce.com>

Tài khoản admin: admin/Odoo@Magenest

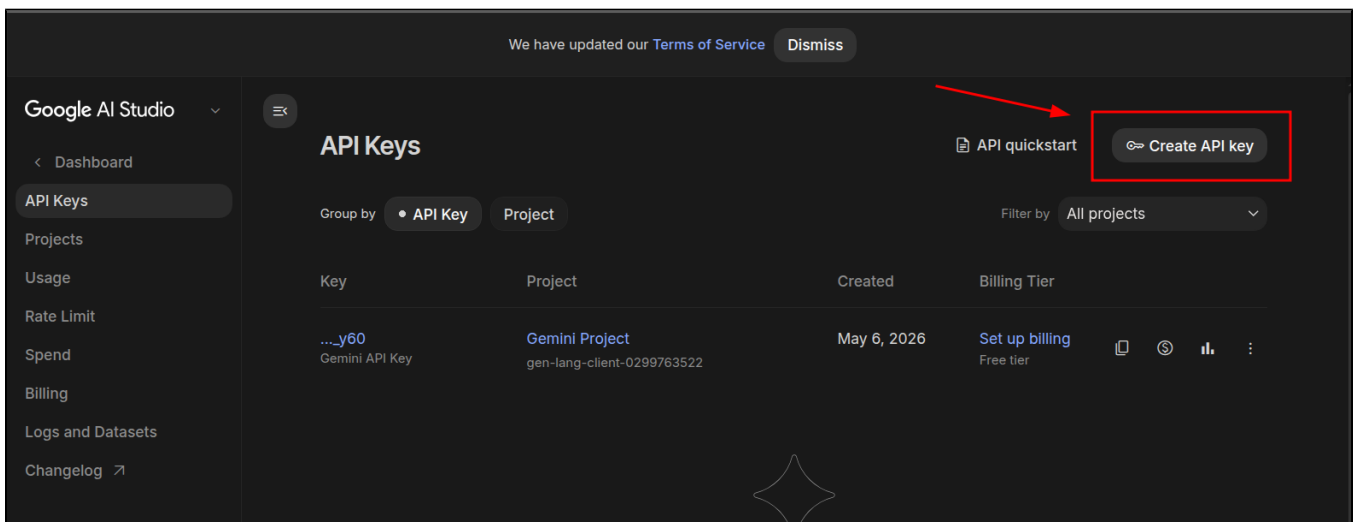
Tài khoản user: user1/Odoo@Magenest

1. Configuring an API Key

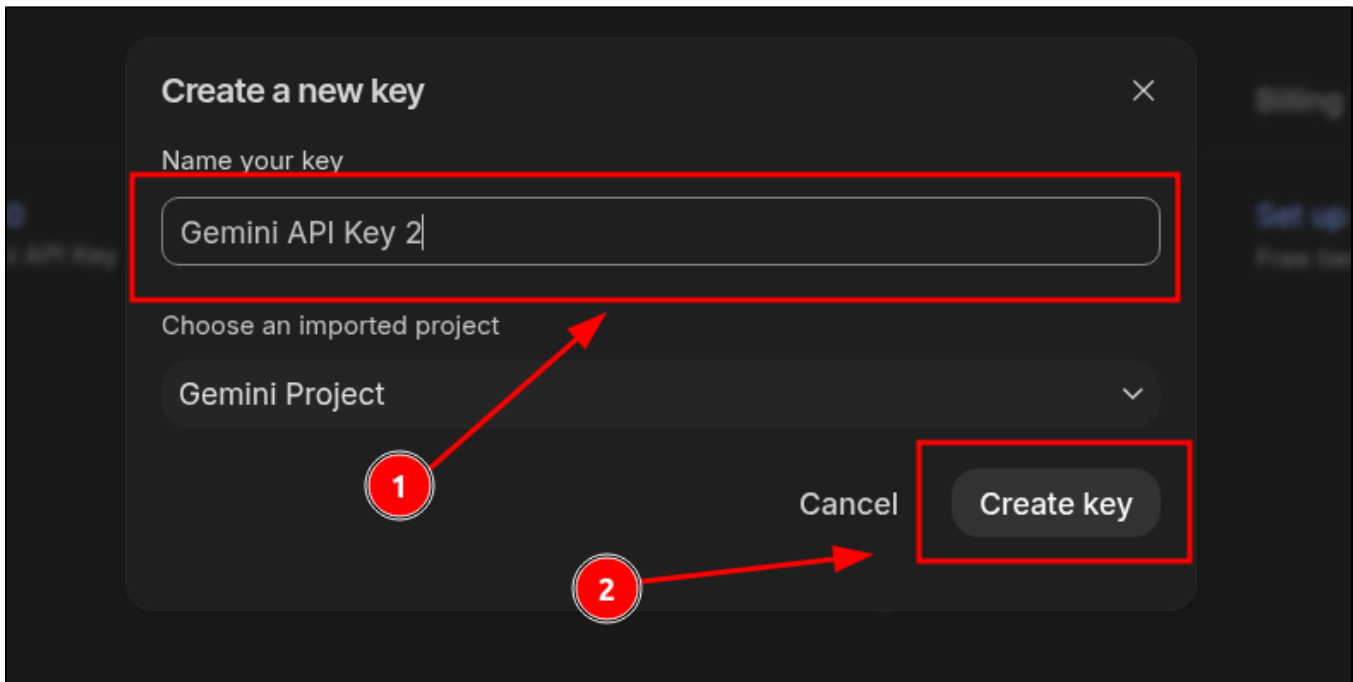
Creating a Gemini API Key

Step 1: Open the [Google AI Studio API Keys](#) page.

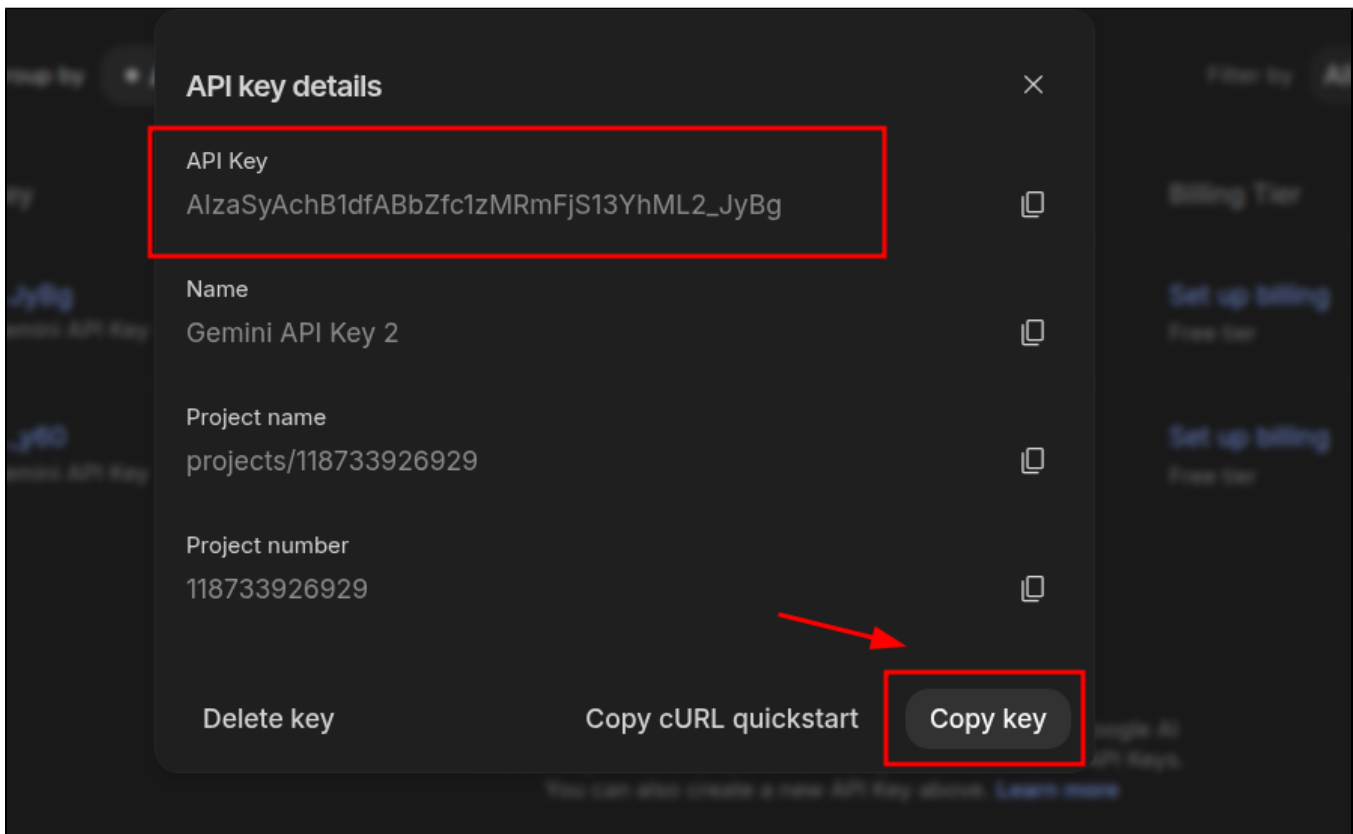
Create a new API key.



Enter a name for the key, select the relevant project, and click **Create key**.

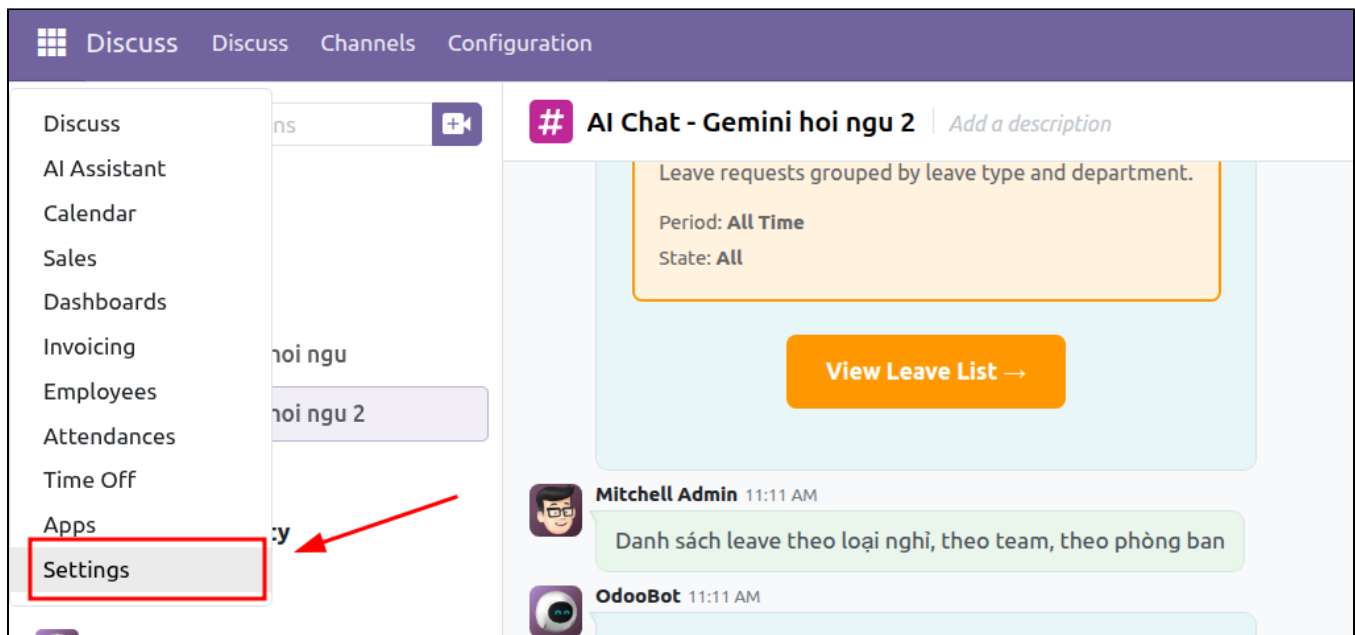


Once the key has been generated, click **Copy key**.

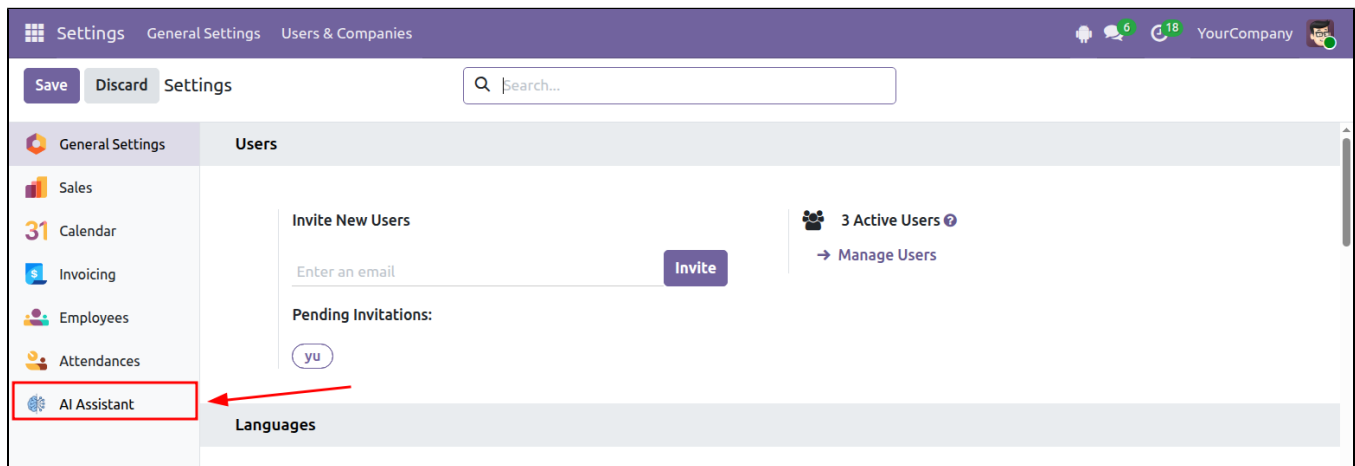


Adding the API Key to Odoo

Step 1: Open **Settings**.



Select the **AI Assistant** tab.



Step 2: Paste the API key into the corresponding field, then click **Save**.

Settings General Settings Users & Companies

Save Discard Settings

General Settings

LLM Configuration

Default Provider

☐ OpenAI

☒ Google Gemini

API Keys

OpenAI API Key sk-...

Gemini API Key

Default LLM Parameters

Default Temperature 0.70

Default Max Tokens 2,000

2. Creating an AI Agent

Step 1: Open AI Assistant.

Discuss Discuss Channels Configuration

AI Assistant

Calendar

Sales

Dashboards

Invoicing

Employees

Attendances

Time Off

Apps

Settings

OdooBot

AI Chat - Gemini hoi ngu 2 Add a description

Leave requests grouped by leave type and department.

Period: All Time

State: All

View Leave List →

Mitchell Admin Yesterday at 11:11 AM

Danh sách leave theo loại nghỉ, theo team, theo phòng ban

OdooBot Yesterday at 11:11 AM

Leave Status List

Click **New** to create a new AI Agent.

AI Assistant Configuration Analytics

New AI Agents

Active Search...

1-2 / 2

Name	LLM Provider	LLM Model	Total Qu...	Success Rate (%)	Avg Respon...	Active
Gemini hoi ngu	Google Gemini	Gemini 2.5 Flash	120	8888.89%	3.72	☒
Gemini hoi ngu 2	Google Gemini	Gemini 2.0 Flash	155	9230.77%	1.63	☒

Step 2: Complete the Agent information, then save the record.

- **LLM Provider:** Select the provider that will power the AI Agent.
- **LLM Model:** Select the language model associated with the chosen provider.

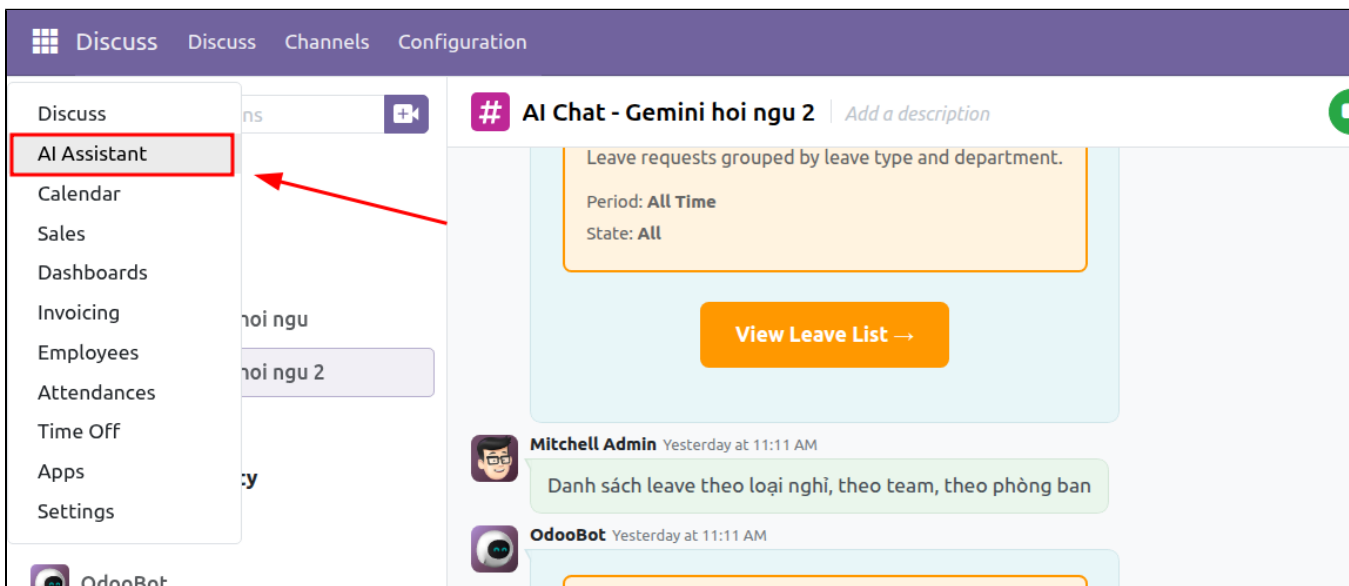
The available models may vary depending on the selected provider.

The screenshot shows the 'AI Assistant' configuration interface. At the top, there are tabs for 'New', 'AI Agents', and 'Channels'. A red box labeled '2' highlights the 'New' button. Below this, there are buttons for 'Chat Now', 'View Channels', and 'View Logs'. The main form has a 'Name' field containing 'AI Assistant' and a 'Description' field containing 'AI Assistant'. A red box labeled '1' highlights the 'LLM Configuration' tab. Under this tab, there are two sections: 'PROVIDER' and 'PARAMETERS'. The 'PROVIDER' section has a red box around the 'LLM Provider' dropdown, which is currently set to 'Google Gemini'. Below it, the 'LLM Model' is set to 'Gemini 2.5 Flash'. The 'PARAMETERS' section shows 'Temperature' set to 0.30 and 'Max Tokens' set to 1,000. There is also an 'API Key' field with a hint to 'Leave empty to use system default'.

3. Creating and Opening a Chat Box

Creating a Chat from the AI Assistant Screen

Step 1: Open AI Assistant.



Step 2: Select the AI Agent you want to use.

AI Assistant Configuration Analytics						
New AI Agents						
Q Active X Search... 1-3 / 3						
☐	Name	LLM Provider	LLM Model	Total Qu...	Success Rate (%)	Avg Respon... Active
☐	AI Assistant	Google Gemini	Gemini 2.5 Flash	0	0%	0.00 ☒
☐	Gemini hoi ngu	Google Gemini	Gemini 2.5 Flash	120	8888.89%	3.72 ☒
☐	Gemini hoi ngu 2	Google Gemini	Gemini 2.0 Flash	155	9230.77%	1.63 ☒

Step 3: Click **Chat Now**.

If the Agent does not already have a chat channel, Odoo will create one automatically.

AI Assistant Configuration Analytics

New AI Agents

Channels 0

1 / 3

Chat Now

View Channels

View Logs

Name ?

AI Assistant

Description ?

AI Assistant

LLM Configuration

Session

Statistics

PROVIDER

LLM Provider

☐ OpenAI
 ☒ Google Gemini

LLM Model

Gemini 2.5 Flash

API Key ?

Leave empty to use system default

PARAMETERS

Temperature ?

0.30

Max Tokens ?

1,000

Send message

Log note

Activity

Step 4: Click the AI Assistant icon in the top navigation bar, then select the relevant chat channel.

AI Assistant Configuration Analytics

New AI Agents

Channels 0

1 / 3

AI Assistants

AI Assistant

Gemini hoi ngu

Gemini hoi ngu 2

Q

Active

X

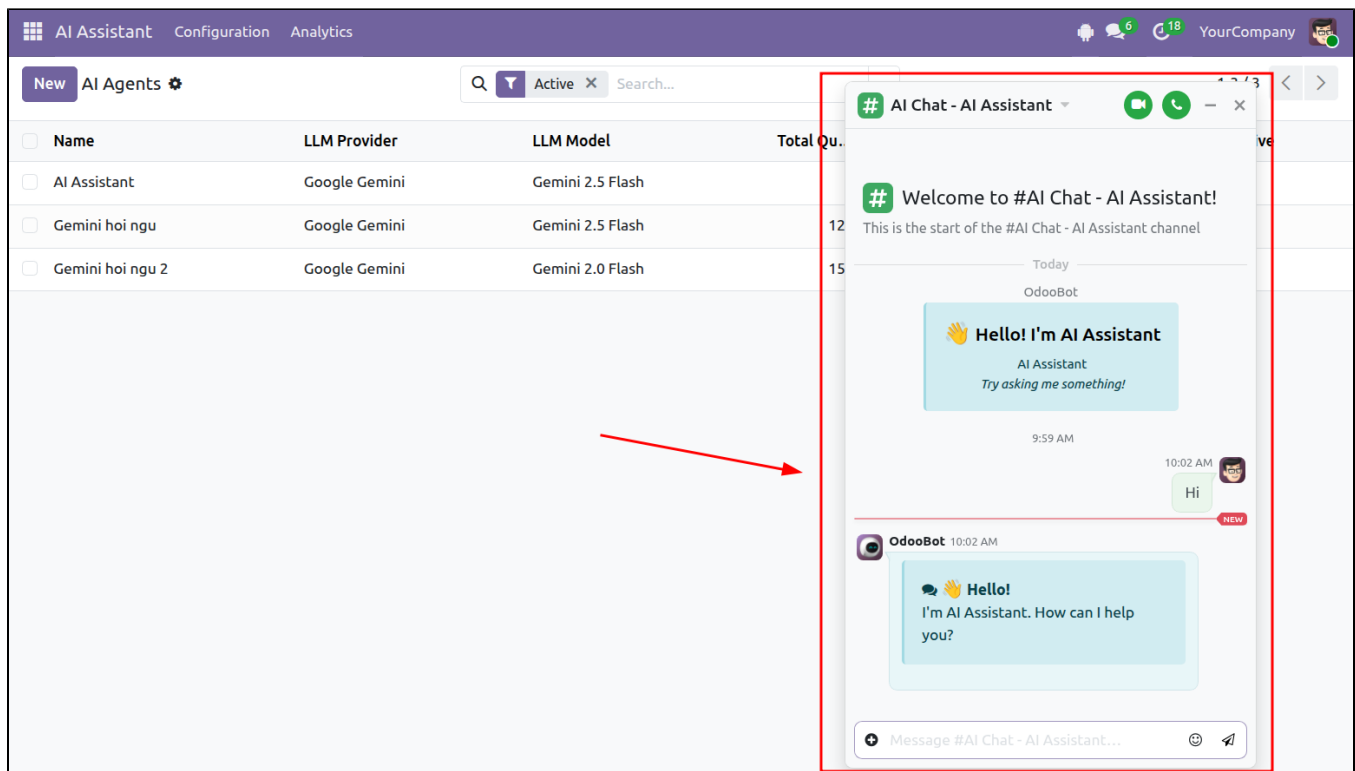
Search...

1

2

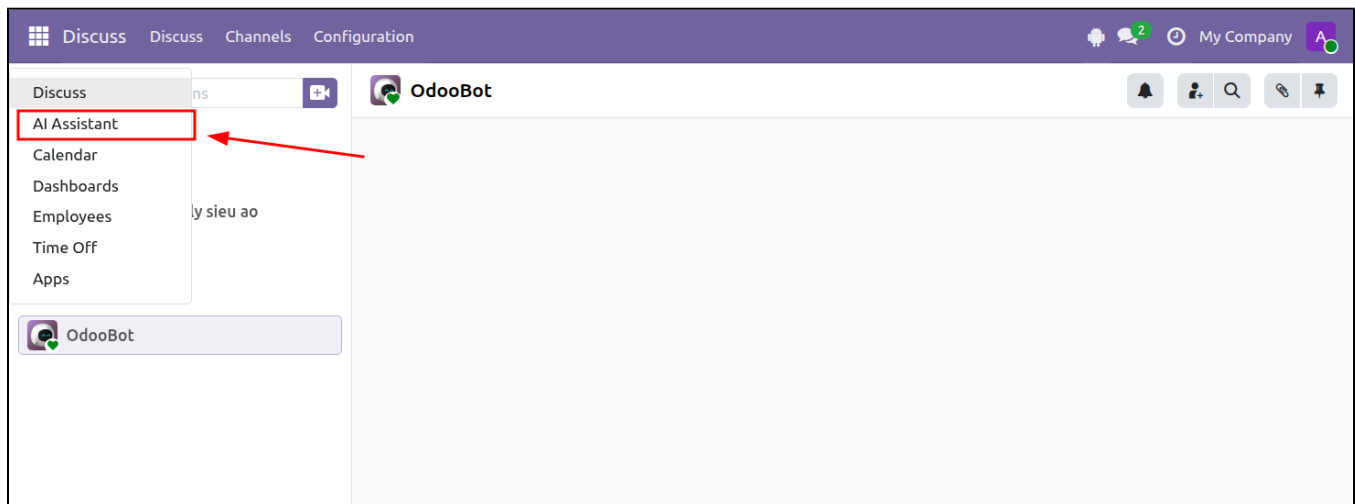
☐	Name	LLM Provider	LLM Model	Avg Respon...	Active
☐	AI Assistant	Google Gemini	Gemini 2.5 Flash	0.00	☒
☐	Gemini hoi ngu	Google Gemini	Gemini 2.5 Flash	3.72	☒
☐	Gemini hoi ngu 2	Google Gemini	Gemini 2.0 Flash	1.63	☒

The chat window will open on the right-hand side of the screen. Enter "Hi" to confirm that the AI Agent is responding correctly.



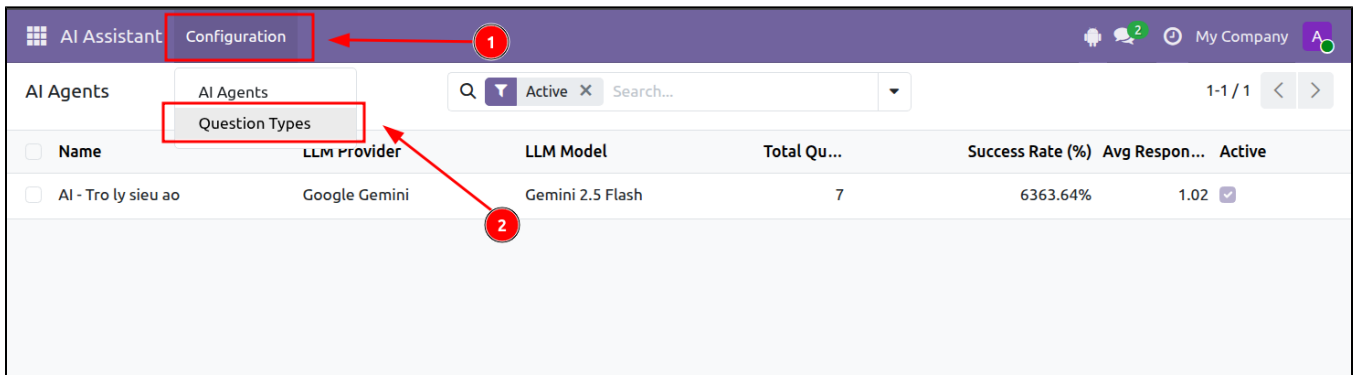
4. Reviewing Supported Questions

Step 1: Open AI Assistant.

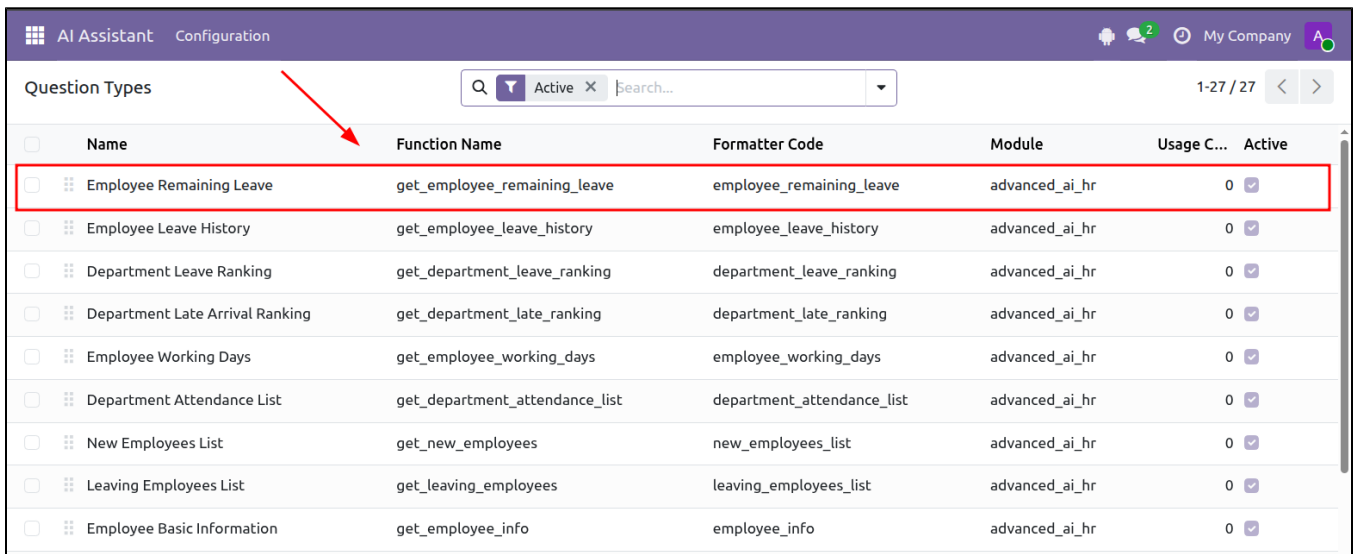


Go to: **Configuration > Question Types**

The Question Types screen lists the requests currently supported by the AI Assistant.



Step 2: Select a Question Type to open its details.



Review the description, keywords, and example questions to understand how the request should be phrased.

For example, a Question Type may allow users to request an employee's remaining leave balance by using the employee's name.

Only questions covered by the configured Question Types can be processed by the current version of the AI Assistant.

AI Assistant Configuration

Times Used

0

1 / 27

Question Types

Employee Remaining Leave

View Usage Logs

Employee Remaining Leave

Technical Code ?

hr_employee_remaining_leave

Module ?

advanced_ai_hr

Priority ?

10

Last Used ?

Avg Response Time (s)

0.00

HYBRID ARCHITECTURE

Function Name ?

get_employee_remaining_leave

Formatter Code ?

employee_remaining_leave

DESCRIPTION

Get employee remaining leave days by leave type. Shows allocated days, used days, and remaining balance for each leave type. Access: user. Required: employee_name

Example Questions

Keywords

- Nhân viên còn bao nhiêu phép?

- Phép còn lại của nhân viên A?

- Số ngày phép của tôi?

- How many leave days does employee A have?

- My remaining leave balance

#