

Odoo OCR - 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:

Error rendering macro 'toc'

null

Introduction

Odoo OCR helps users extract structured data from uploaded business documents and create corresponding records directly in Odoo.

The module supports AI-powered document extraction, manual or scheduled processing, bulk uploads, and document-specific workflows such as splitting multiple purchase orders from a single file. After extraction, users can review and correct the captured data before creating the final Odoo record.

Highlight Features

- Upload documents directly into Odoo for OCR processing.
- Use AI to extract structured information from uploaded files.
- Configure the OCR provider, API key, and AI model in Odoo.
- Process documents immediately or queue them for background processing.
- Review and edit extracted information before creating Odoo records.
- Create invoices directly from extracted OCR data.
- Upload and process multiple documents in one batch.
- Upload OCR documents directly from Customer Invoices and Vendor Bills.
- Automatically split multiple purchase orders contained in a single file.
- Process the split purchase orders individually after extraction.

System Requirements

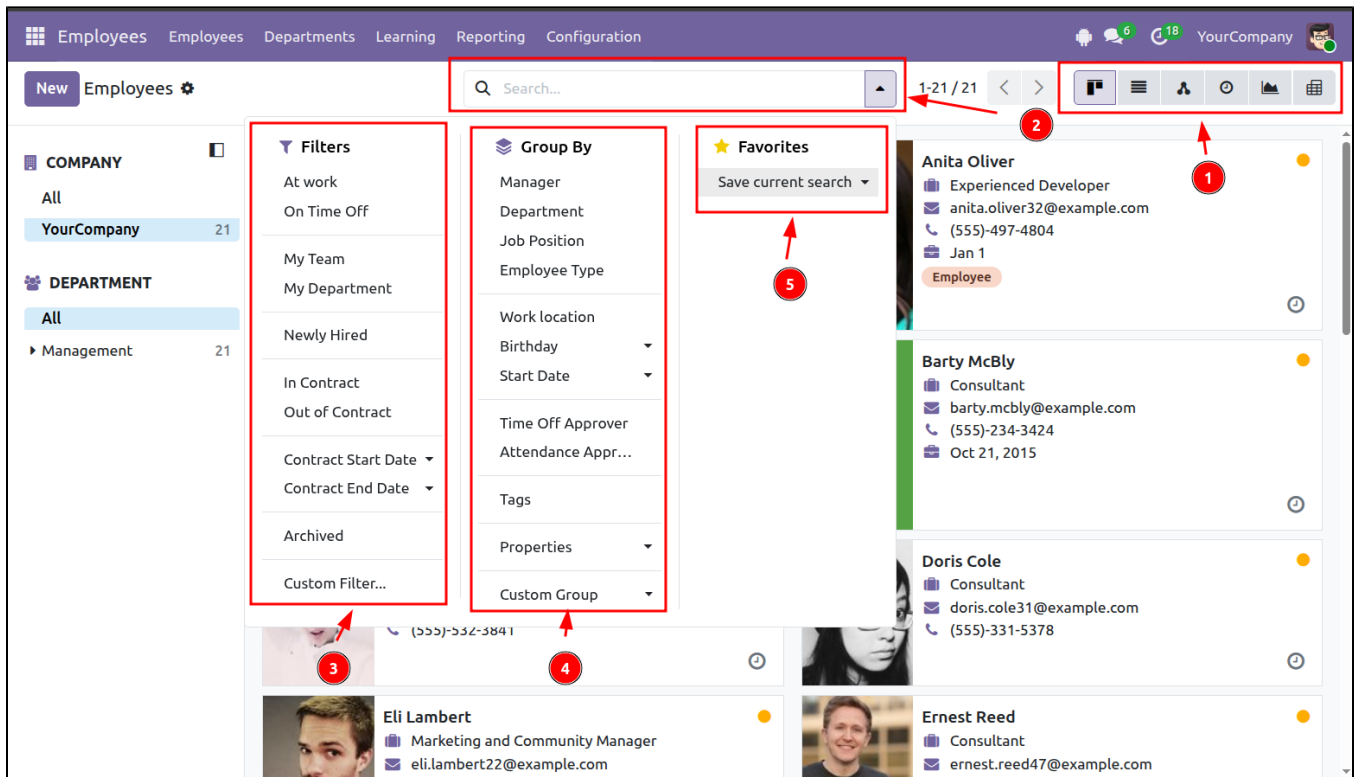
Before using Odoo OCR, make sure the following requirements are met:

- Access to an Odoo environment where the **Magenest AI OCR** module is available.
- The required `advanced_ai` modules are installed and activated.
- Administrator access is available for module installation and OCR configuration.
- A valid API key is available for the AI provider configured for OCR.
- The OCR **Provider**, **API Key**, and **Model** are configured under Odoo Settings.
- Users have the appropriate Odoo permissions to create and manage the resulting business records.

General System Operations

Views, Search, and Filters

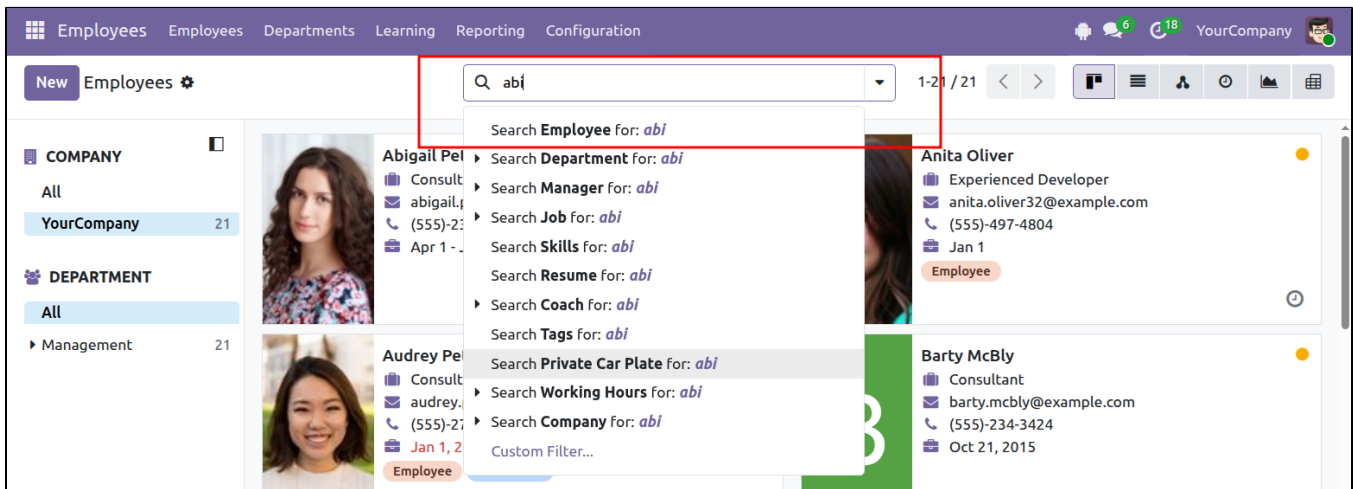
From any screen, users can switch between the available views by clicking the corresponding view icon in the upper-right corner (1).



To apply filters or group records, click the search bar (2) and select the options you need. You can use built-in filters and groups or create your own. Multiple grouping levels can also be applied.

The current filter can be saved to **Favorites** (5) for later use.

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

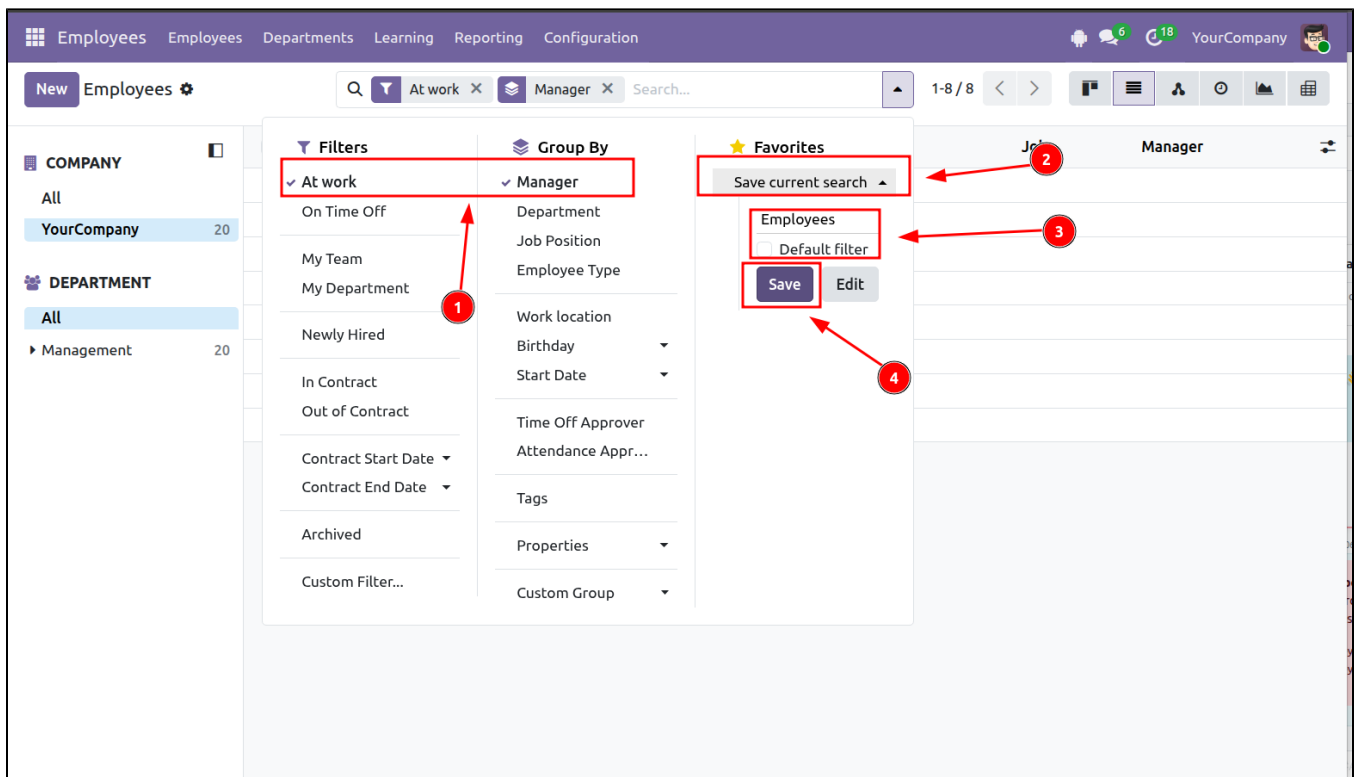


Employee Name	Work Phone	Department	Job	Manager
Abigail Peterson	(555)-233-3393	Management / Professional Services	Consultant	
Anita Oliver	(555)-497-4804	Management / Research & Development / R&D ...	Experienced	
Audrey Peterson	(555)-276-7903	Management / Professional Services	Consultant	
Barty McBly	(555)-234-3424	Management / Administration	Consultant	
Beth Evans	(555)-532-3841	Management / Research & Development	Experienced	
Doris Cole	(555)-331-5378	Management / Professional Services	Consultant	
Eli Lambert	(555)-169-1352	Management / Sales	Marketing a	
Ernest Reed	(555)-518-8232	Management / Professional Services	Consultant	
Jeffrey Kelly	(555)-264-7362	Management / Sales	Marketing a	
Jennie Fletcher	(555)-363-8229	Management / Research & Development	Experienced	
Keith Byrd	(555)-505-5146	Management / Research & Development	Experienced	
Marc Demo	(441)-695-2334	Management / Research & Development	Experienced	
Mitchell Admin	+1 555-555-5555	Management	Chief Technic...	Mitchell Admin
Paul Williams	(555)-262-1607	Management / Research & Development / R&D ...	Experienced ...	Marc Demo

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

Save the Current Filter

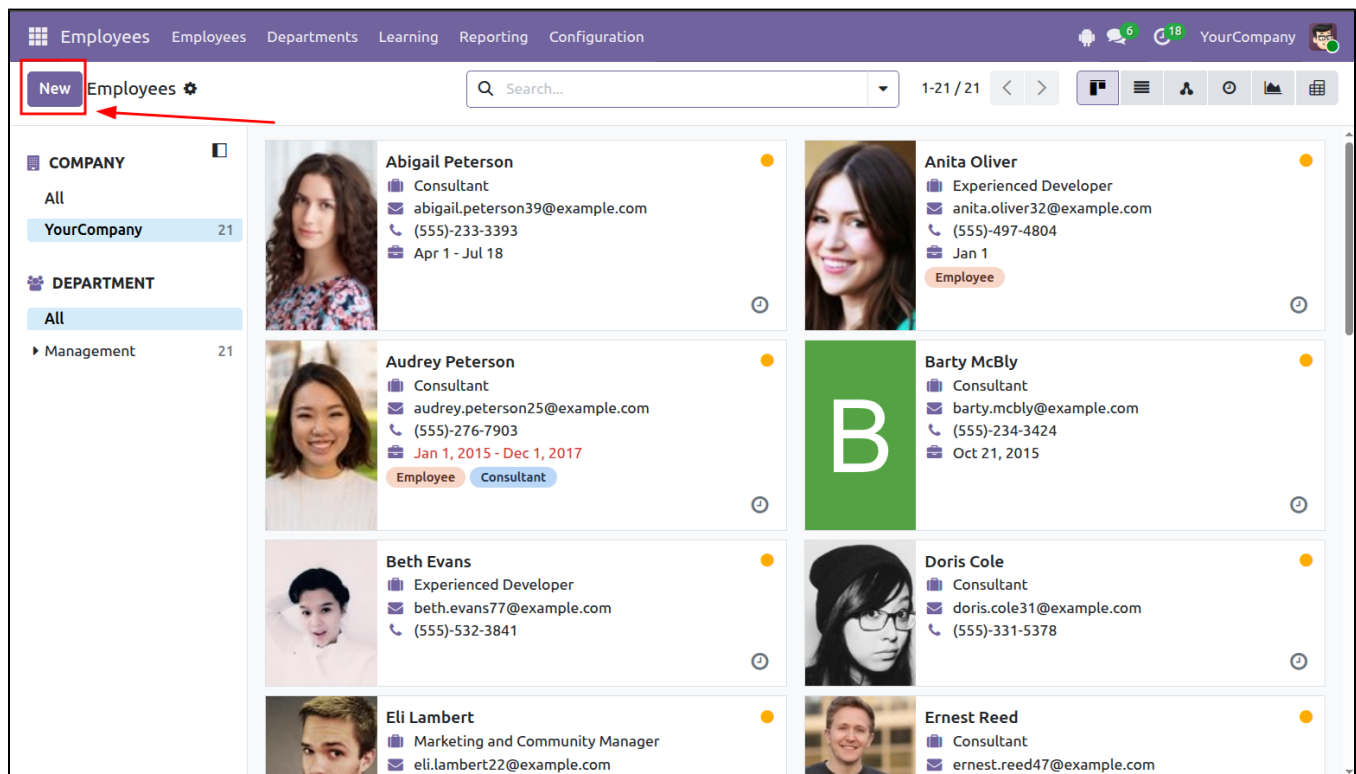
- + **Step 1:** Apply the filters or grouping options you want (1). You can use existing options or create custom ones.
- + **Step 2:** Select **Save current search** (2).
- + **Step 3:** Enter a name for the saved filter.
 - Select **Default Filter** if you want it to be applied automatically whenever you open the view.
 - Select **Shared** if you want other users in the system to be able to use it.
- + **Step 4:** Click **Save** (4).



Create a New Record

Create a Record Manually

+ **Step 1:** Open the section where you want to create a new record, for example **Employees**, then click **New**.



+ **Step 2:** Enter the required information and click **Save** (1).

The screenshot shows the 'Employees' form in Odoo. At the top, there is a navigation bar with tabs: Employees, Departments, Learning, Reporting, and Configuration. Below this, there is a 'New' button and a 'Create User' button. A red box labeled '1' highlights the 'New' button. A red box labeled '2' highlights the 'Discard' button (represented by a trash icon). A red box labeled '3' highlights a warning message 'Missing required fields' in the top right corner. The main form area contains a large text field for 'Employee's Name', a photo upload icon, and several input fields for contact information (e.g., johndoe@example.com, Work Phone, Work Mobile) and job details (e.g., Founder, Motorized, Buildin...). Below the form, there are tabs for 'Work', 'Resume', 'Certifications', 'Personal', 'Payroll', and 'Settings'. The 'Work' tab is active, showing fields for 'Company', 'Department', 'Job Position', 'Job Title', and 'Manager'. To the right, there is an 'ORGANIZATION CHART' section with a placeholder for setting a manager or reports.

- Click **Discard** (2) to cancel and return to the previous view.
- If any required fields are missing, Odoo will display a warning and prevent the record from being saved (3).

Duplicate a Record

You can also create a new record by duplicating an existing one.

From a record form:

1. Click the gear icon.
2. Select **Duplicate**.

The screenshot shows the 'Quotations' form in Odoo. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice, Products, Reporting, and Configuration. Below this, there is a 'New' button and a 'Create Invoice' button. A red box labeled '1' highlights the gear icon (settings) next to the 'New' button. A red box labeled '2' highlights the 'Duplicate' option in the dropdown menu that appears when the gear icon is clicked. The main form area contains a large text field for 'S0000' and a 'Customer' field. Below these, there are buttons for 'Print', 'Delete', 'Generate a Payment Link', and 'Send an email'.

Alternatively, from **List View**:

1. Select the record or records you want to duplicate.
2. Click **Actions > Duplicate**.

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	

Edit 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.

New

Quotations

S00007

⚙️

🔒

✖️

1 / 7 < >

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) <i>Noise-reducing panels for open spaces</i>	5.00	0.00	0.00	295.00		\$ 1,475.00
Two-Seat Sofa (Linen) <i>Two-Seater Sofa with Oak Wood Frame</i>	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 <i>Comfortable yellow chair for daily work</i>	1.00	0.00	0.00	18.00		\$ 18.00

Delete a Record

There are two ways to delete records.

From Form View

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

1

2

Quotations S00007

Create Invoice

S00000

Customer

Order Date May 13, 10:16 AM

Payment Terms Immediate

Quotation Template

Order Lines Quote Builder Other Info

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Amount
[FURN_6667] Acoustic Bloc Screens (Black) <i>Noise-reducing panels for open spaces</i>	5.00	0.00	0.00	295.00		\$ 1,475.00
Two-Seat Sofa (Linen) <i>Two-Seater Sofa with Oak Wood Frame</i>	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 <i>Comfortable yellow chair for daily work</i>	1.00	0.00	0.00	18.00		\$ 18.00

From List View

Select the records you want to delete, then choose: **Actions > Delete**

1

2

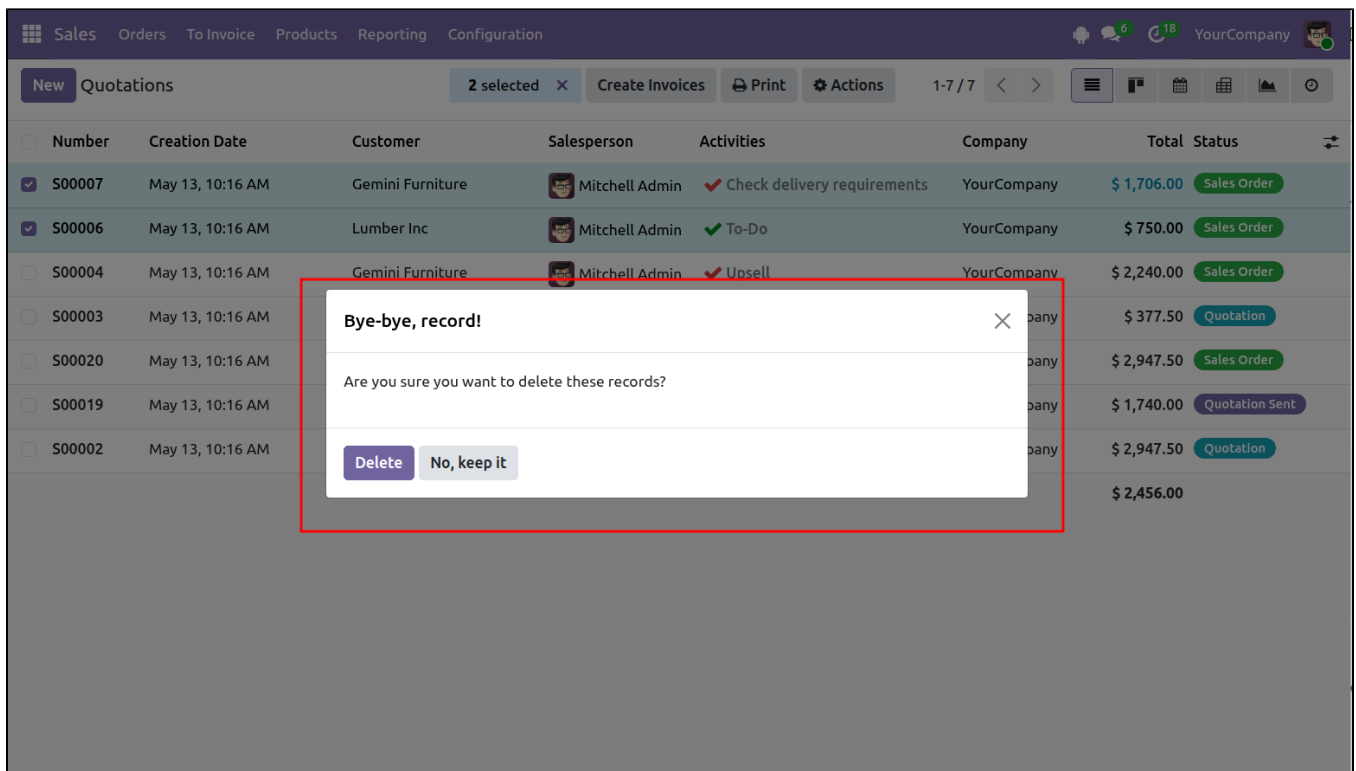
New Quotations 2 selected Create Invoices Print Actions 1-7 / 7

Number	Creation Date	Customer	Salesperson	Activities	Company	Total	Status
☒ S00007	May 13, 10:16 AM	Gemini Furniture	Mitchell Admin	Check deliv	Company	\$ 1,706.00	Sales Order
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☐ 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	

After you click **Delete**, a confirma

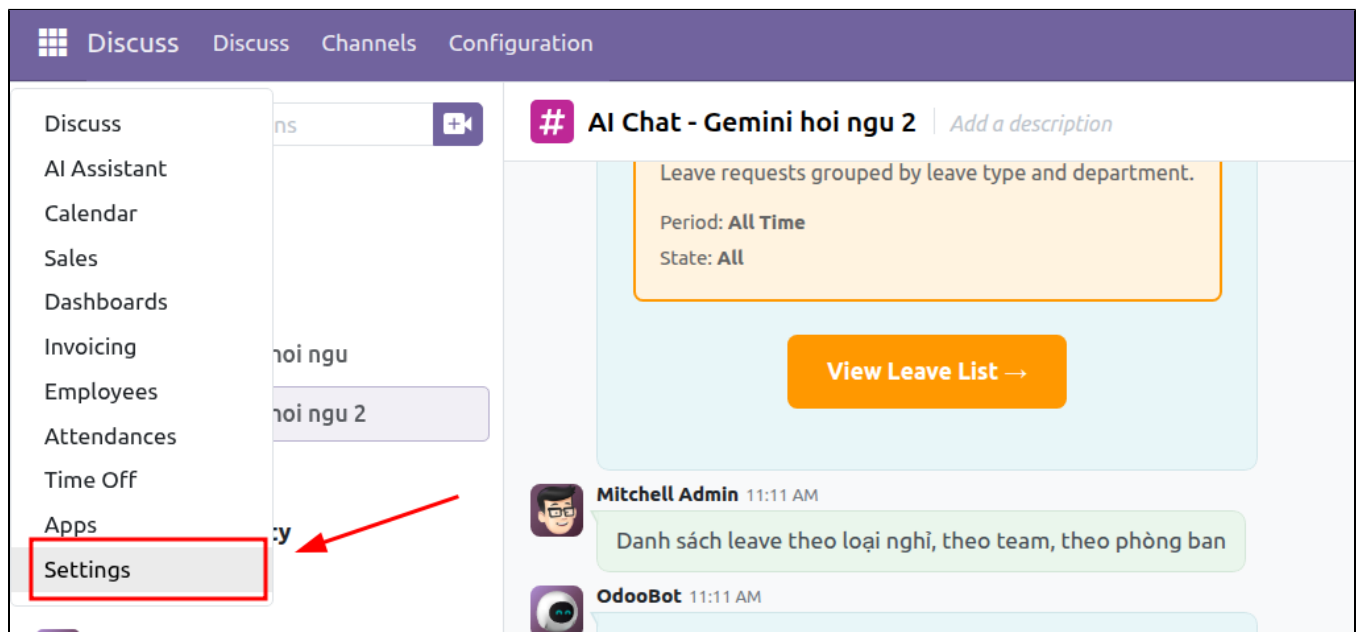
tion dialog appears.

- Select **Delete** to confirm.
- Select **No** to cancel.

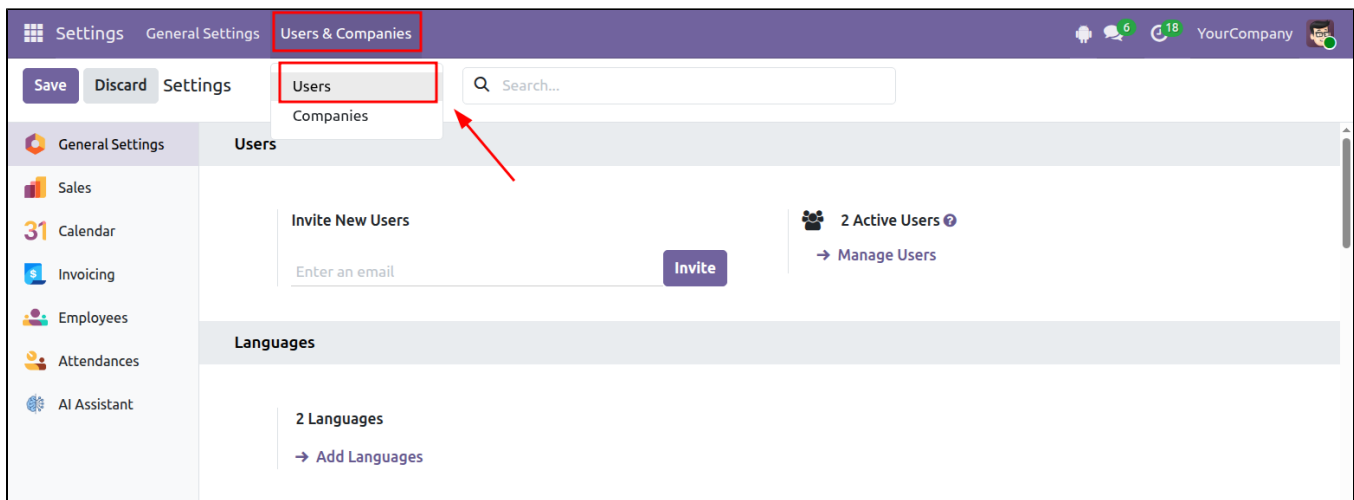


Create a User - Community Edition

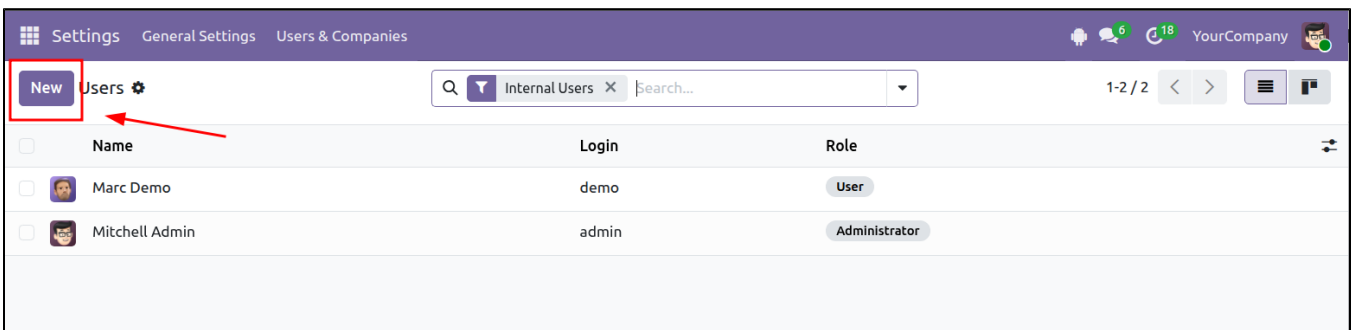
+ Step 1: Open Settings.



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



+ **Step 3:** Click **New** to create a user.



+ **Step 4:** Enter the user information.

- **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 in the system.
 - **Internal User:** For employees who need access to internal and administrative functions such as Attendance, Time Off, Payroll, HR, Accounting, and other business applications.
 - **Portal User:** For employees who only need to view information related to themselves, such as attendance, leave requests, payslips, and overtime, without management or editing access.
 - **Public User:** For external visitors who do not need to sign in and can only access public content on the website.

As a general guideline:

- If an employee only needs to check attendance, submit leave requests, and view payroll or overtime information, use **Portal User**.
- If the user needs to manage, approve, or work with HR, Attendance, or Time Off modules, use **Internal User**.

Settings General Settings Users & Companies

New Users New

Contact

Missing required fields

Send an Invitation Email

e.g. John Doe

Login

Phone

Access Rights Preferences Calendar

ROLES

Role ☒ User ☐ Administrator

Companies YourCompany

Default Company [?] YourCompany

MASTER DATA SALES

Products [?] Create

Contact No

Export No

Sales [?] Administrator

+ Step 5: To change the user's password, click the settings icon and select **Change Password**.

Settings General Settings Users & Companies

New Users Marc Demo

Employee 1 Contact

1 / 2 < >

Duplicate

Archive

Delete

Change Password

Disable two-factor authentication

Send Password Reset Instructions

Privacy Lookup

le.com

Work Mobile

Access Rights Preferences Calendar Security

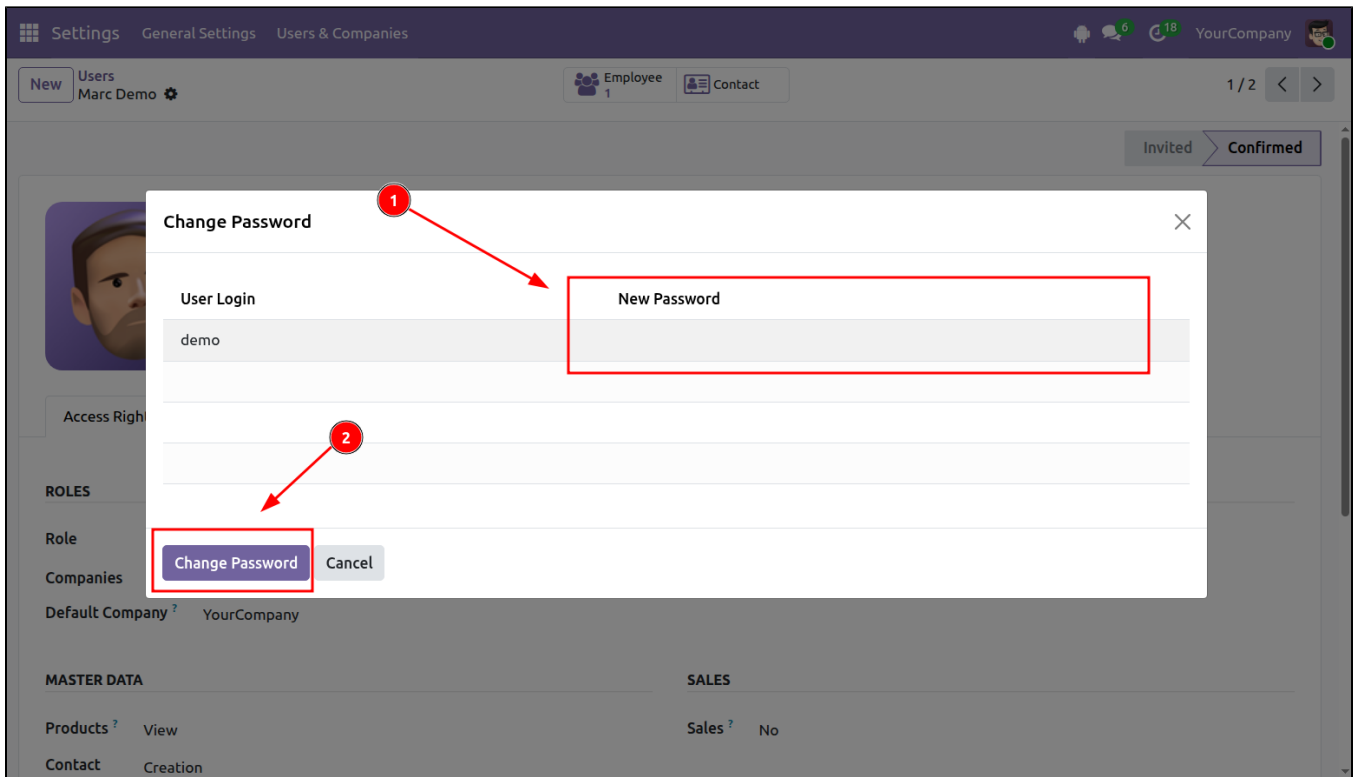
+ Step 6: Set the login password.

- Enter the new password in the **New Password** field.
- Click **Change Password** to confirm and save it.

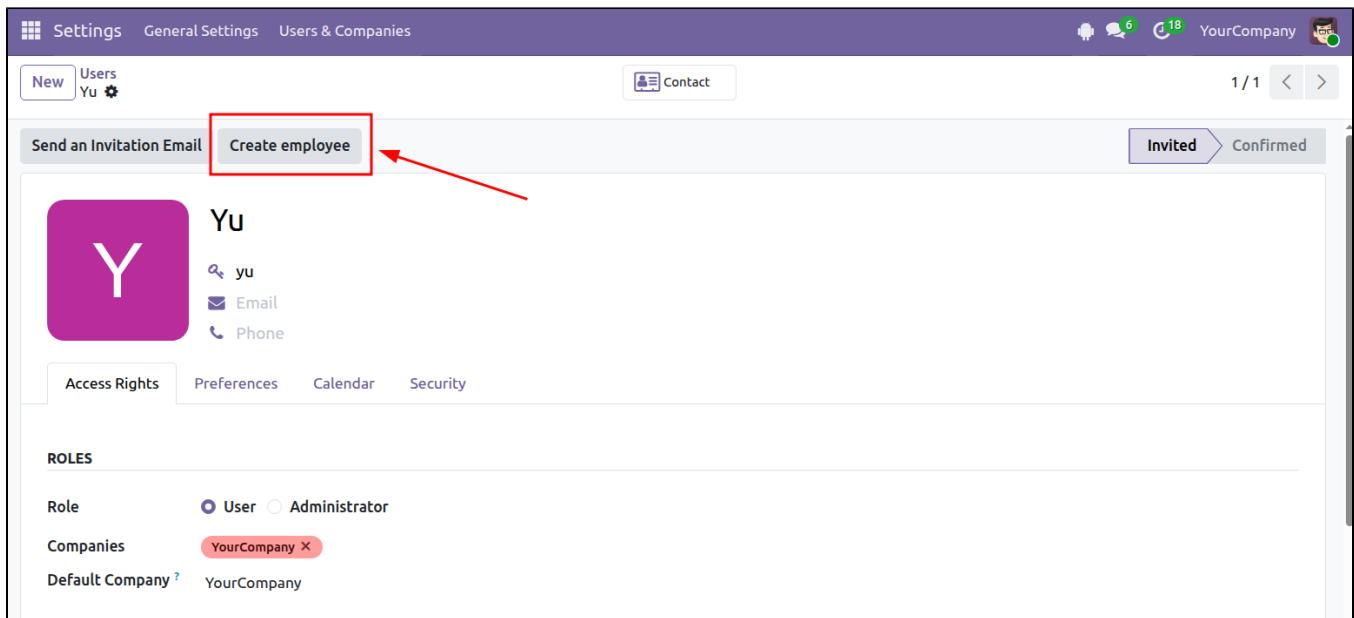
Note

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

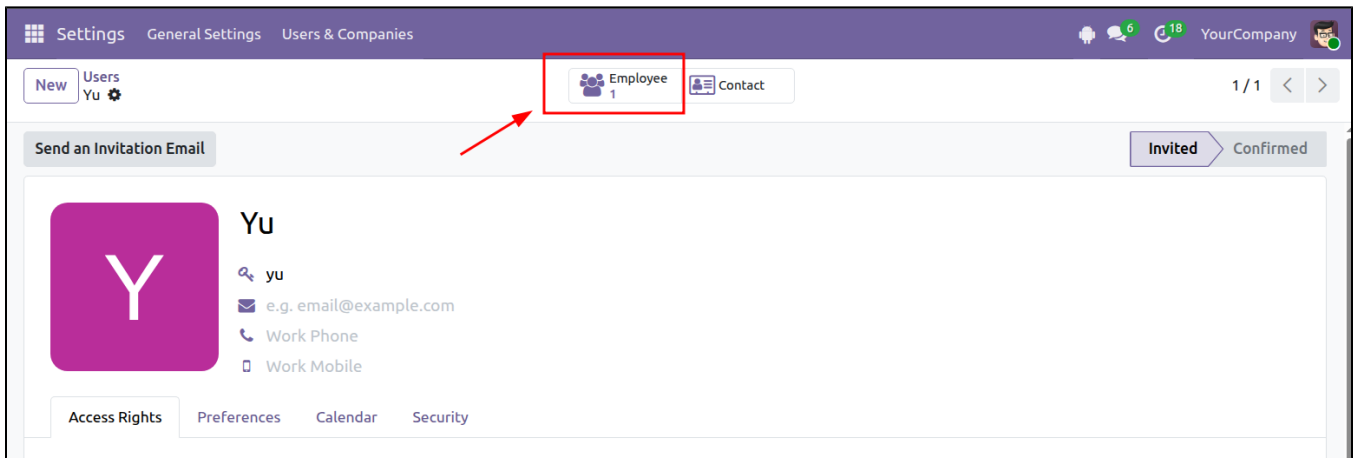
- **Username:** The user account that was created.
- **Password:** The password configured in the previous step.



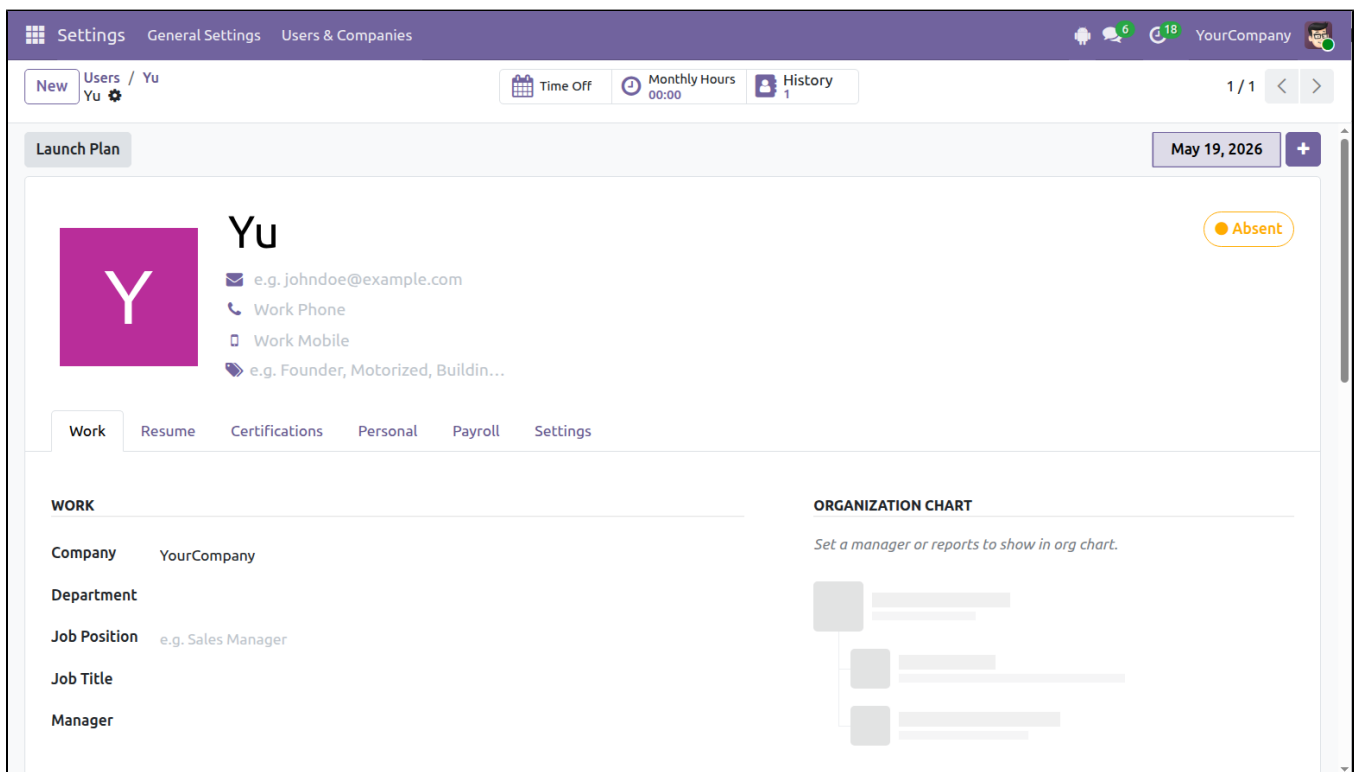
+ **Step 7 - Optional:** Click **Create Employee** to create an employee record for the user.



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

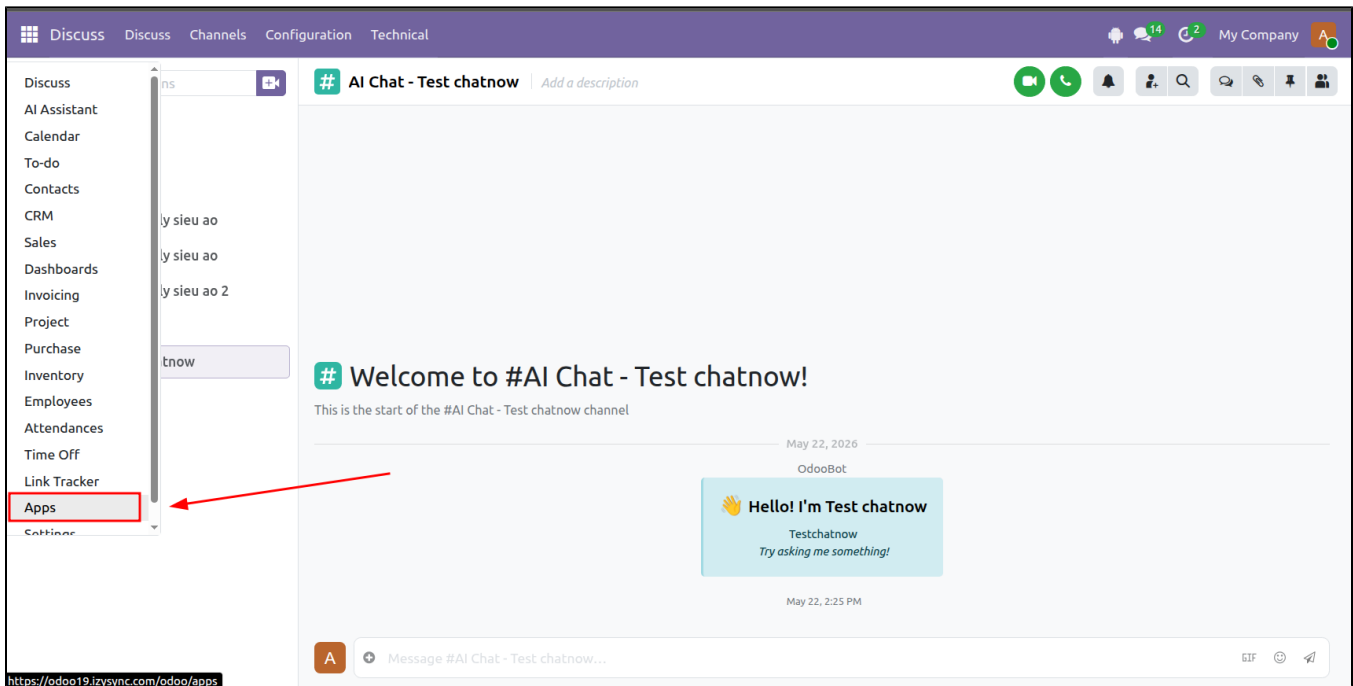


The user account is automatically linked to the employee profile after the employee is created.

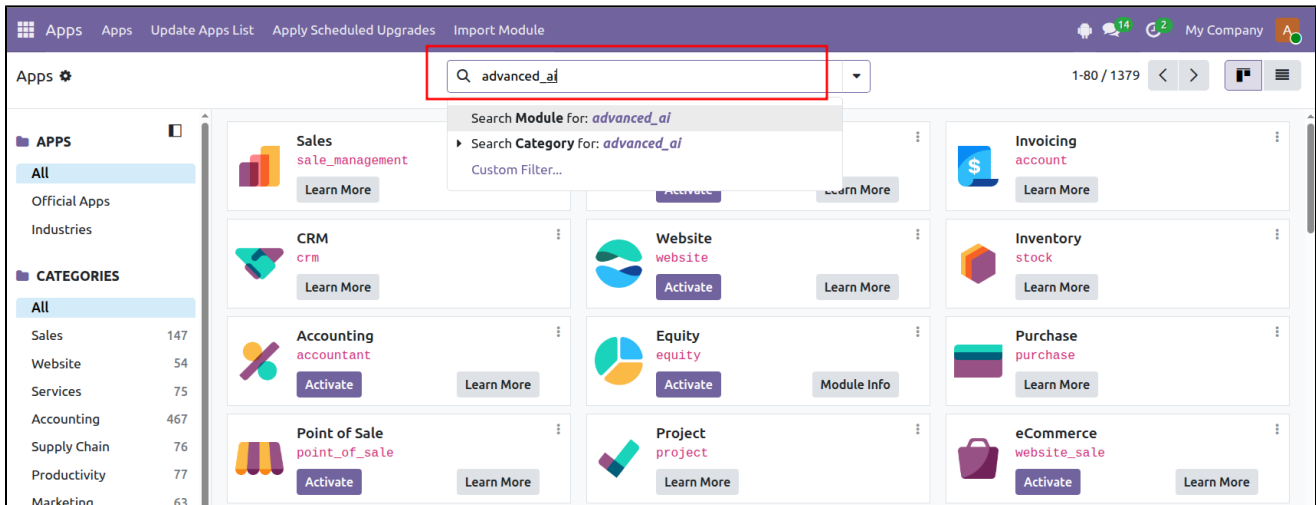


Activate the Required Modules

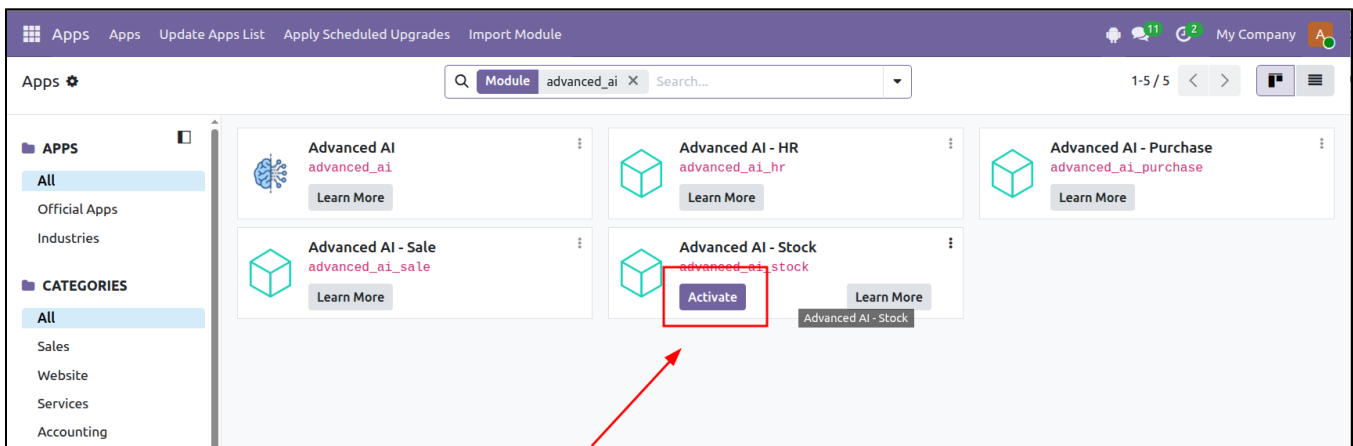
+ Step 1: Open Apps.



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



Step 3: Click **Activate** to install the required module.



I. Module Activation and AI Connection

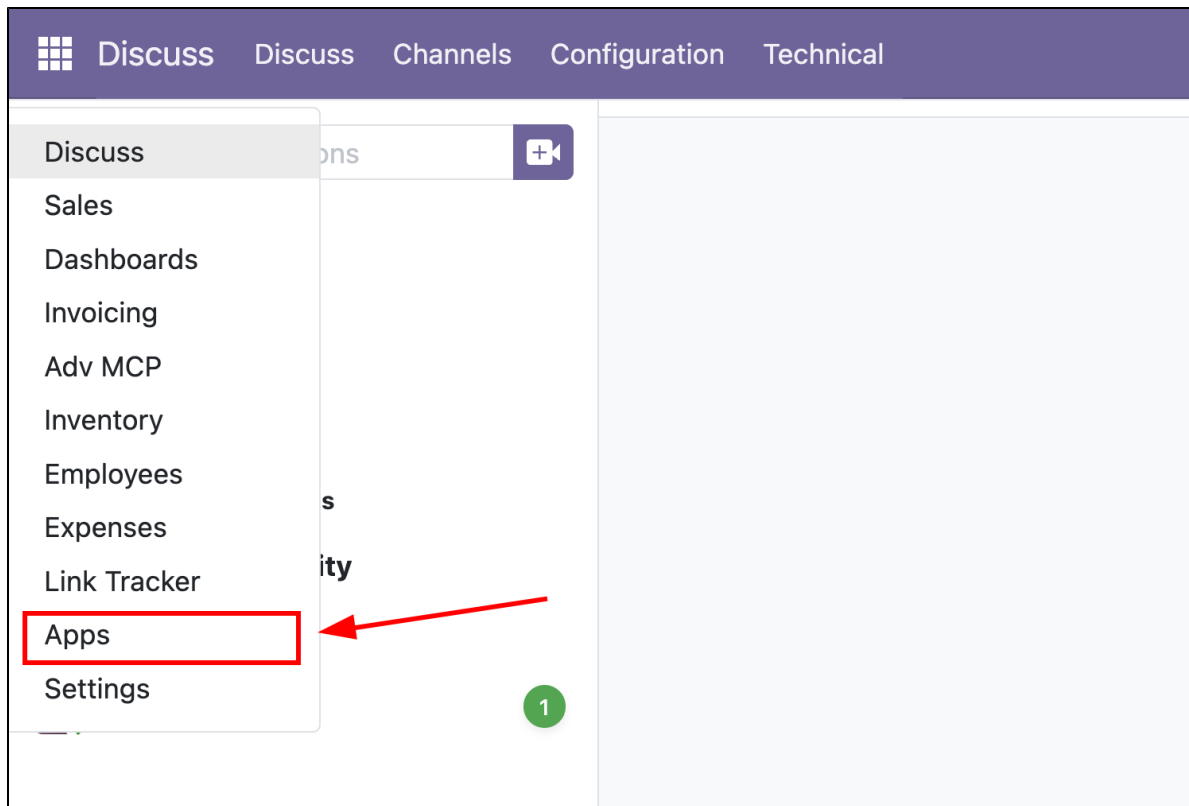
System URL: <https://aicypher.hunnamecommerce.com>

Admin account: admin / Odoo@Magenest

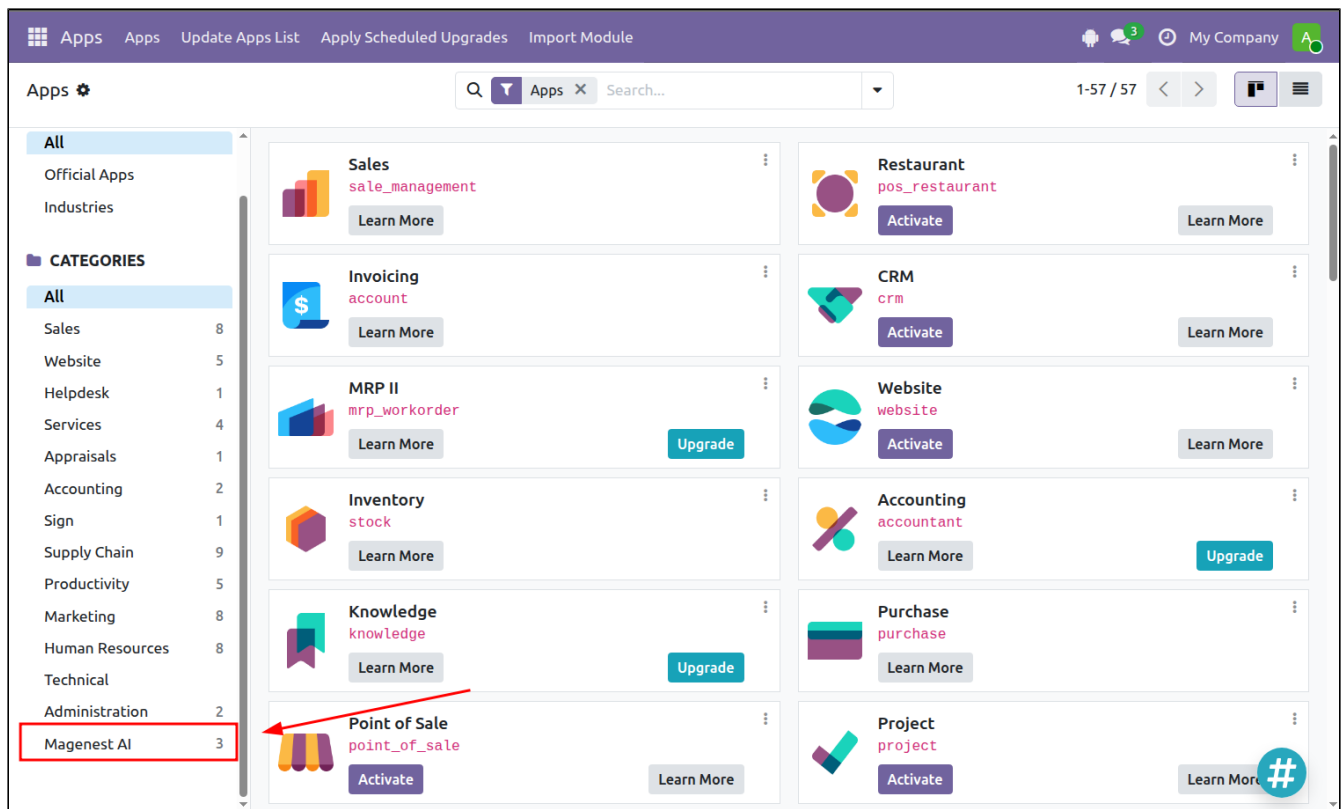
1. Activate the Module

To use OCR features, the **Magenest AI OCR** module must be activated.

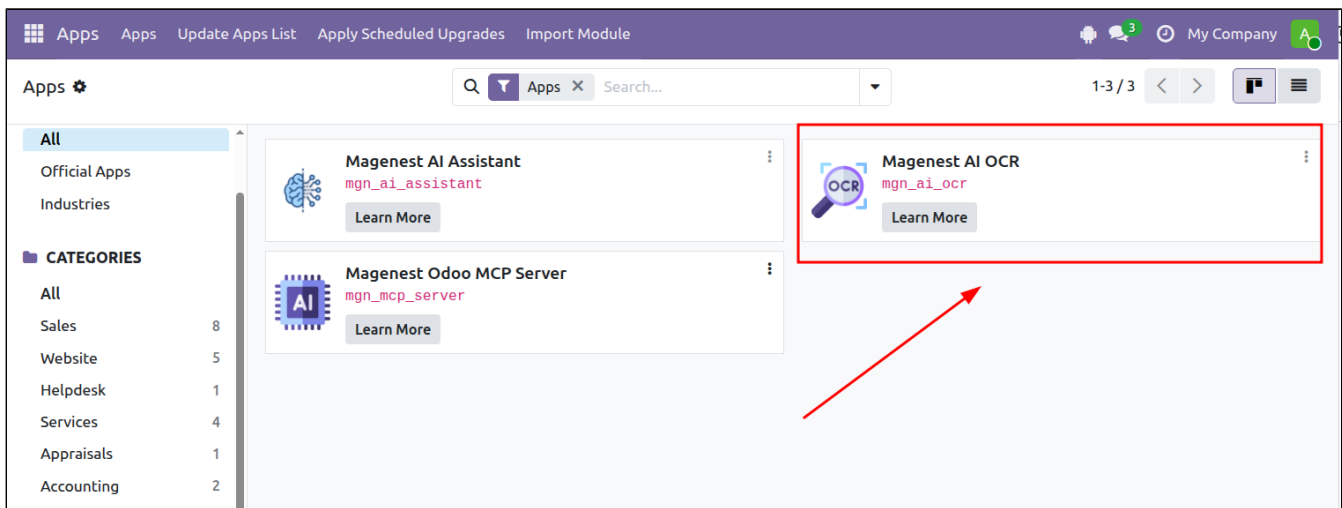
+ Step 1: Open **Apps**.



+ Step 2: Under **Categories**, select **Magenest AI**.



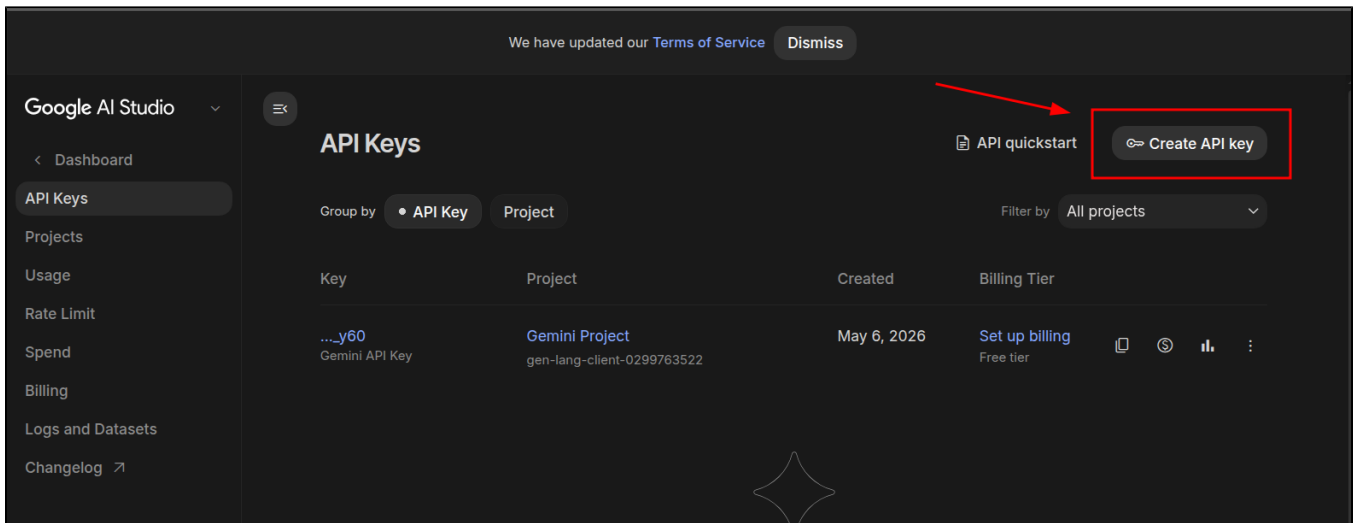
+ Step 3: Activate Magenest AI OCR.



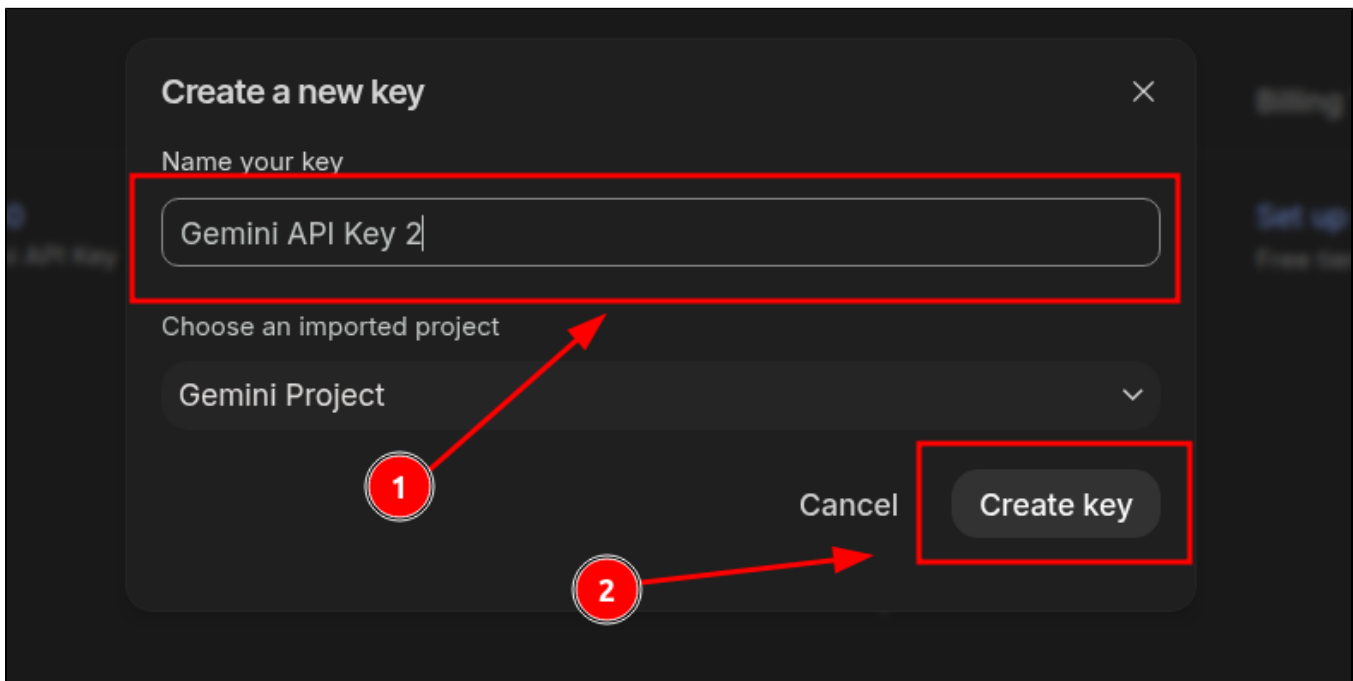
2. Connect to Gemini

Get a Gemini API Key

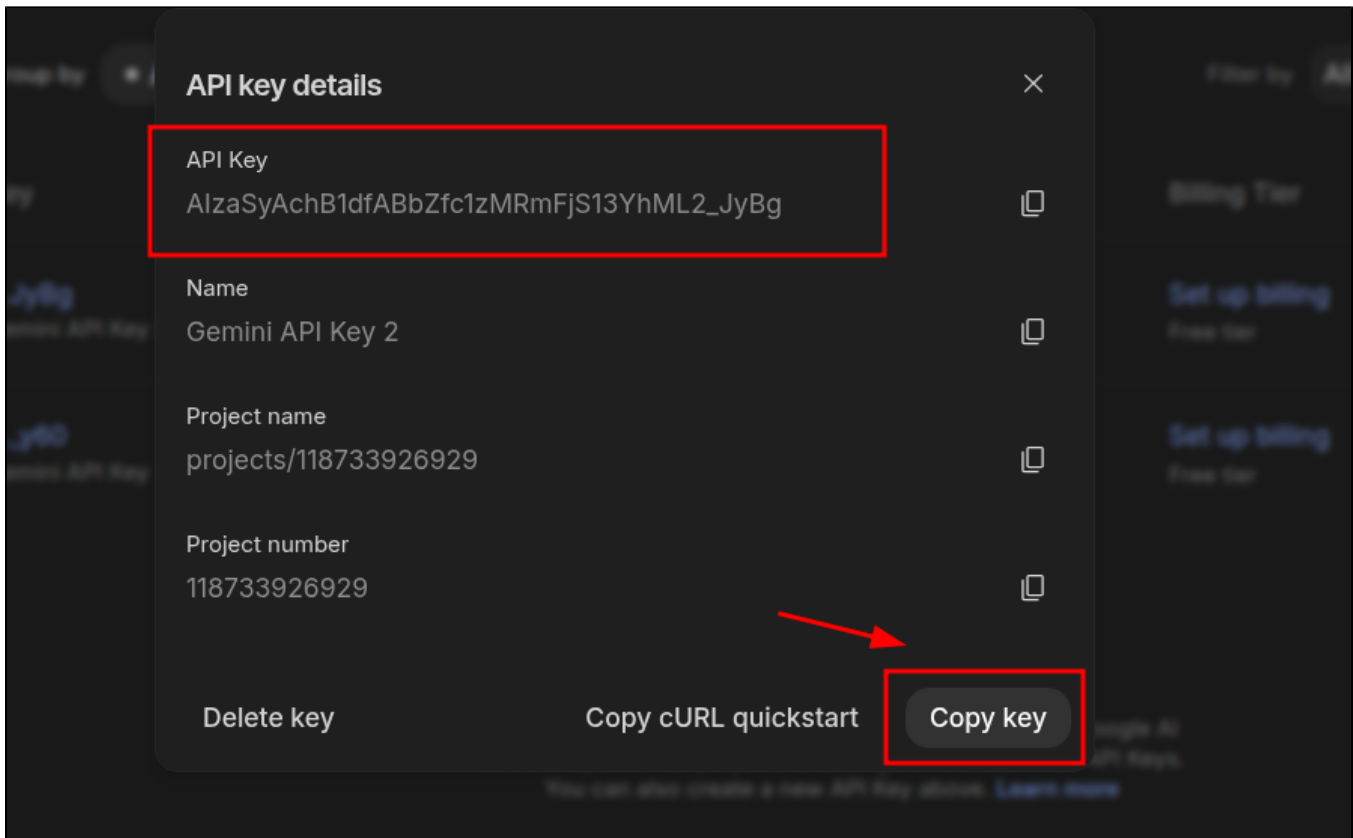
+ Step 1: Open [Google AI Studio](#) and create a new API key.



+ **Step 2:** Enter a name for the key, then click **Create key**.

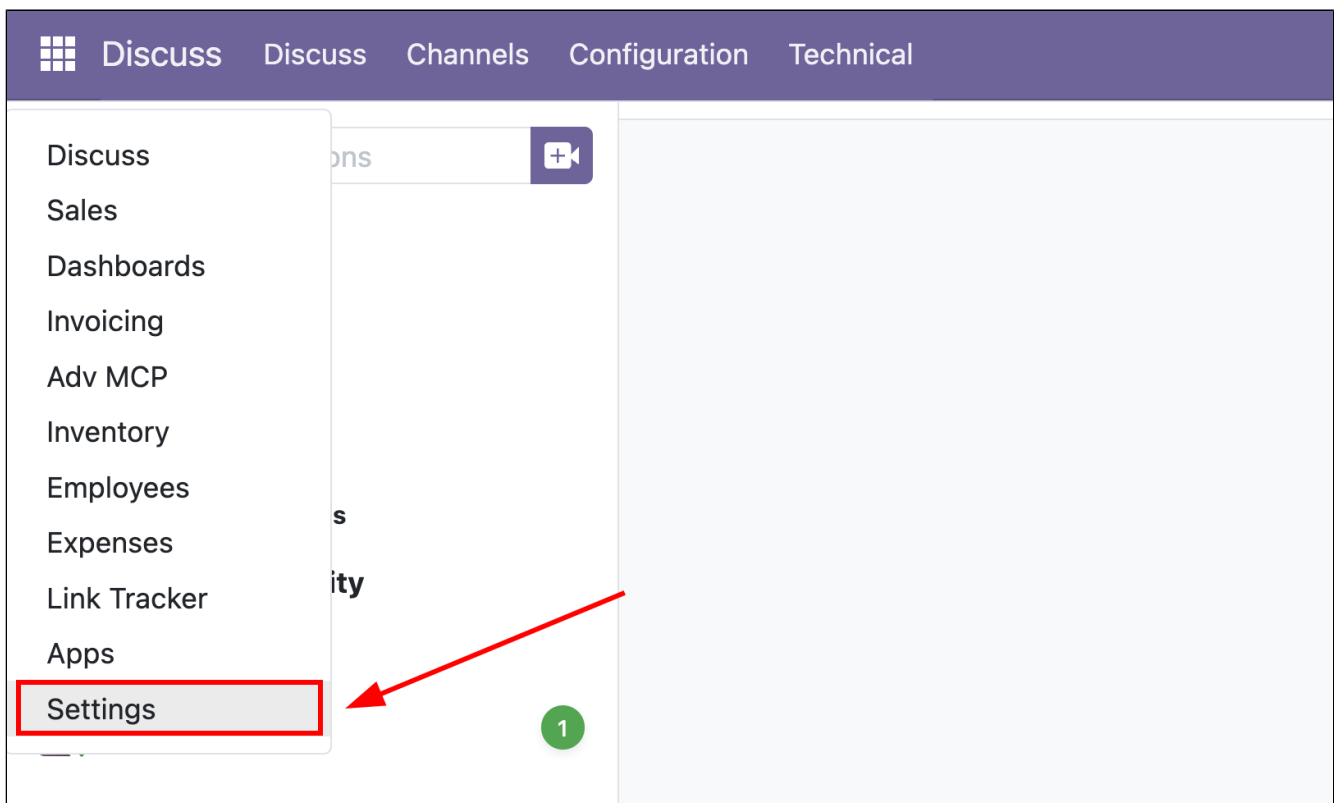


+ **Step 3:** Copy the generated key.

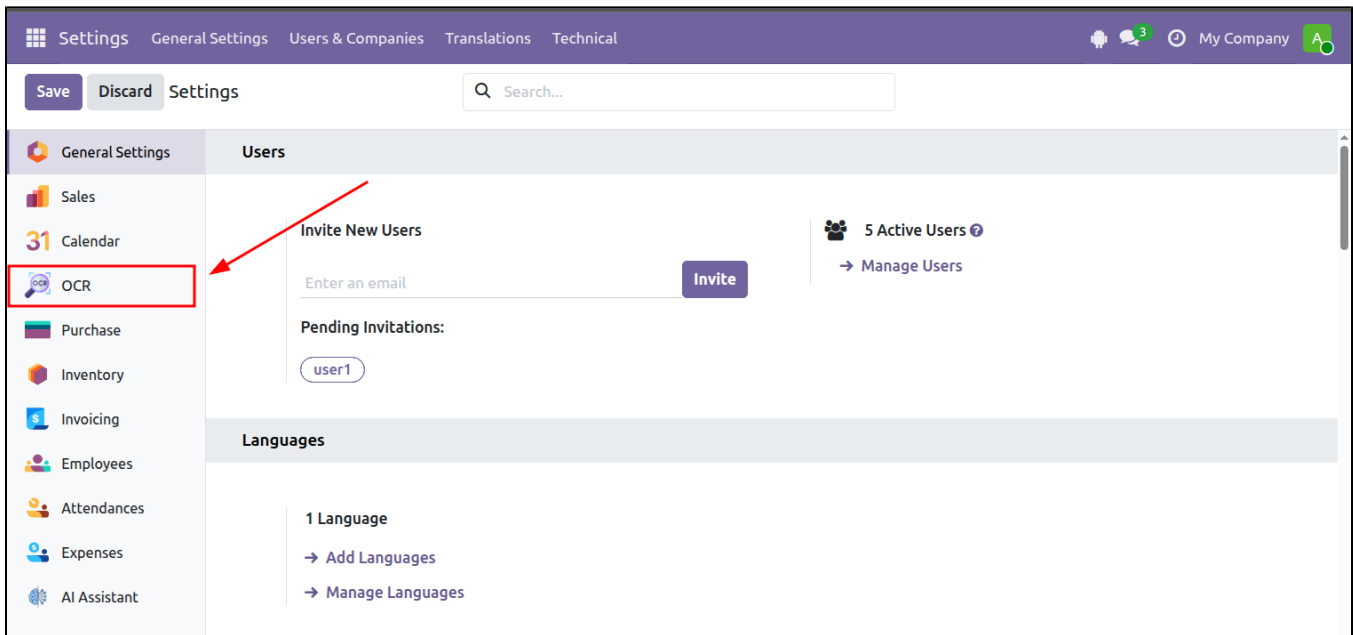


Add the API Key to Odoo

+ Step 1: Open Settings.



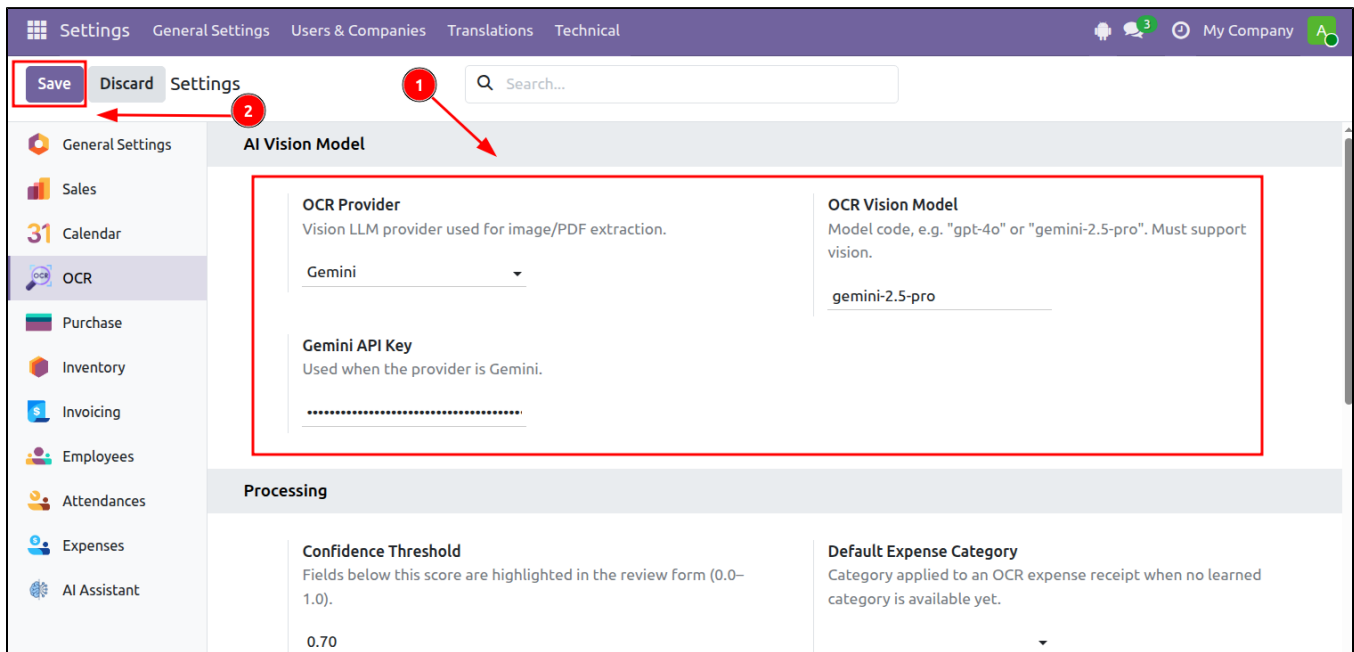
+ Step 2: Go to OCR.



+ **Step 3:** Configure the following three fields:

- **Provider**
- **Key**
- **Model**

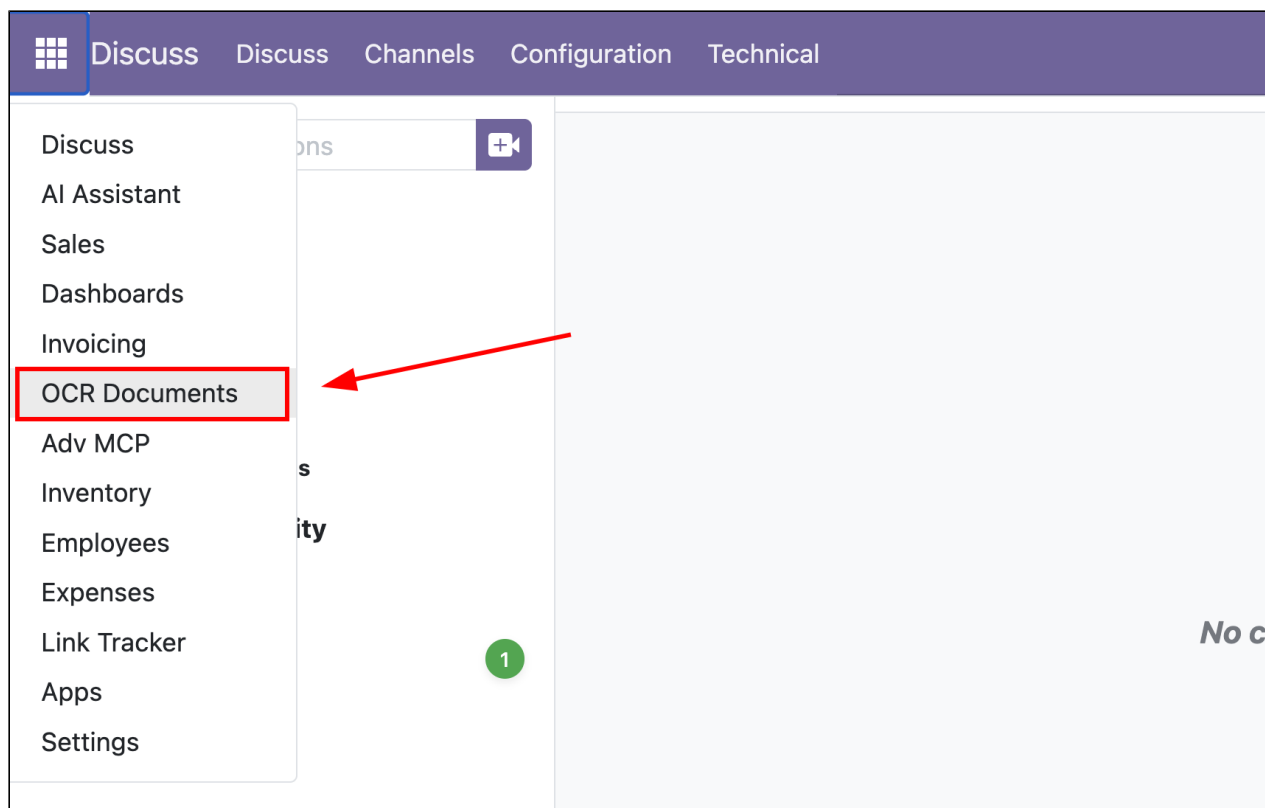
Then click **Save**.



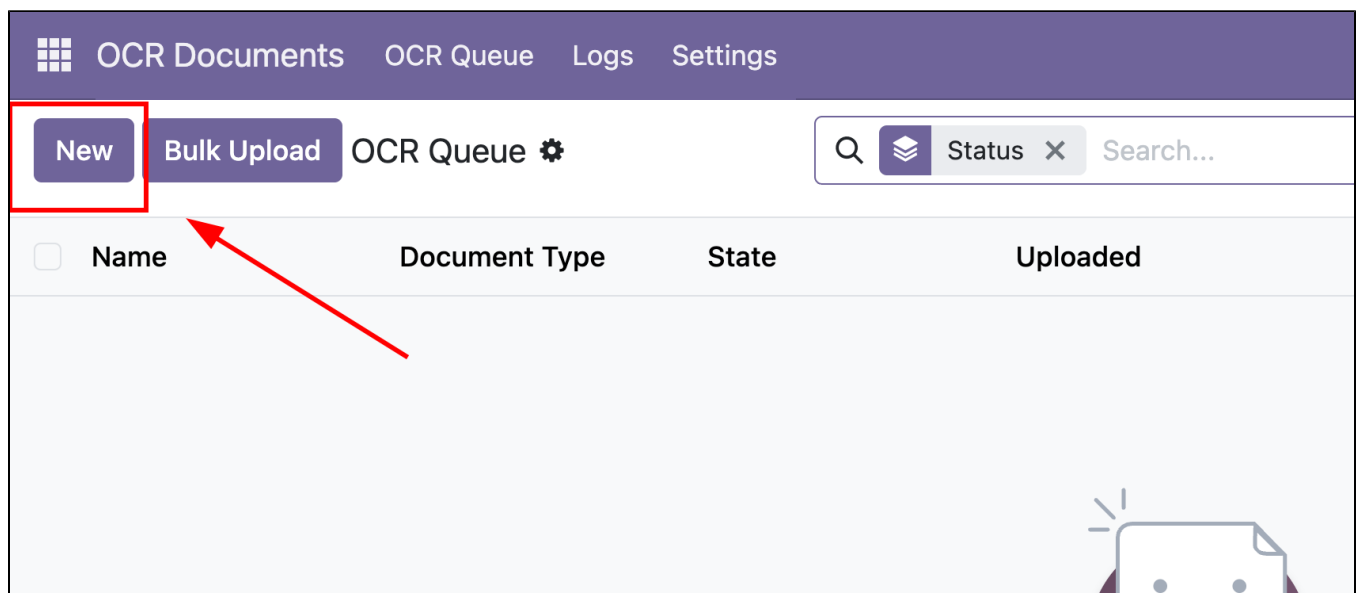
II. Using OCR

General OCR Workflow

+ **Step 1:** Open OCR Documents.

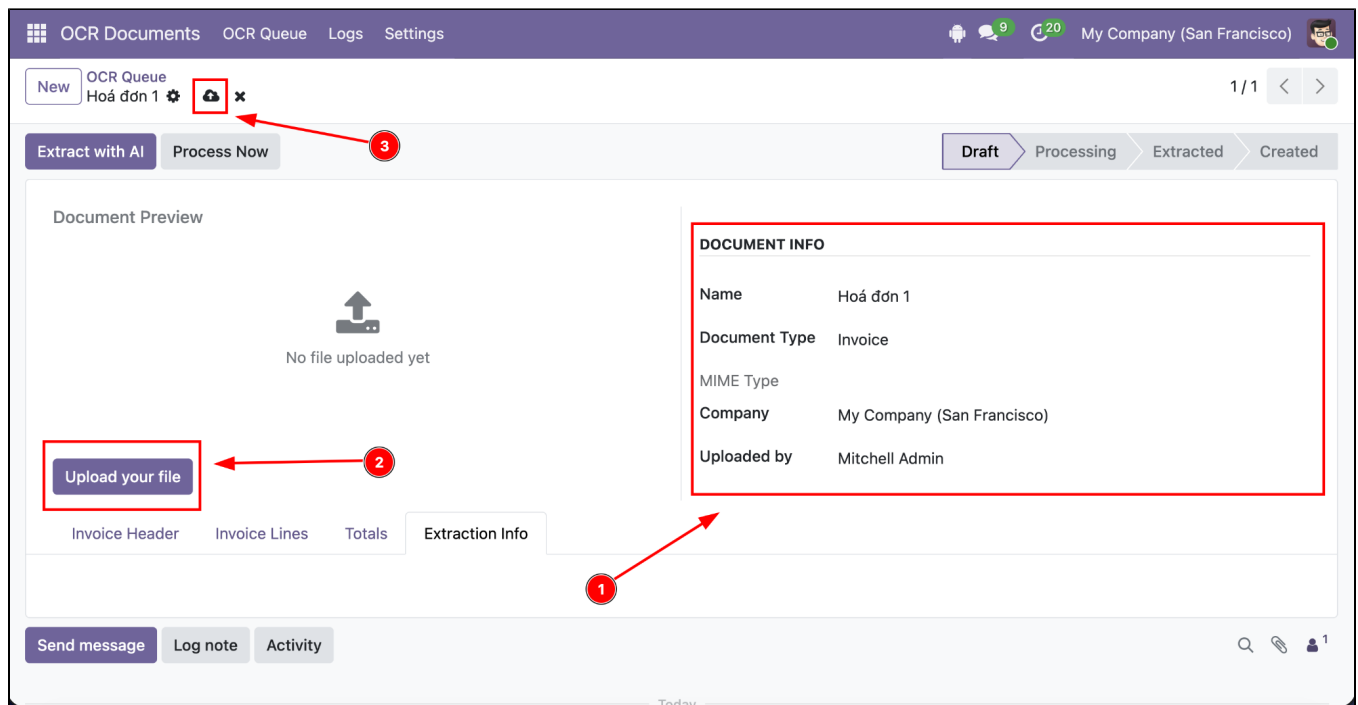


+ Step 2: Click New.



+ Step 3: Complete the document form, then save it.

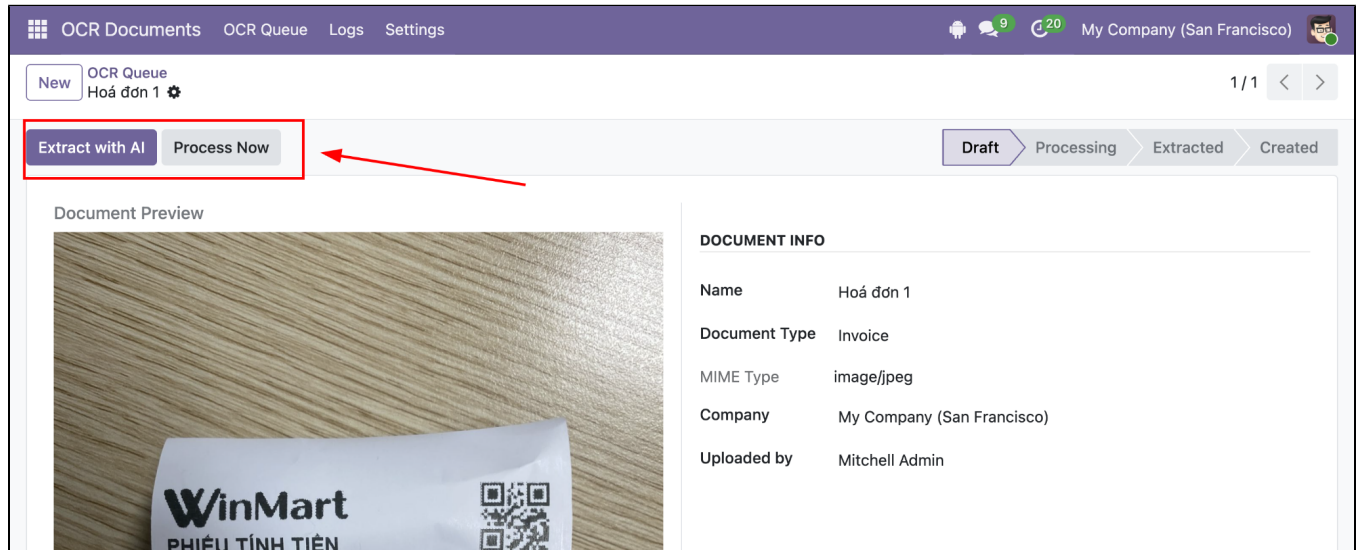
- **Name:** Enter a name for the document.
- **Document Type:** Select the type of document. (Eg: **Invoice**)
- **Upload Your File:** Upload the document you want to process.



+ Step 4: Click Extract with AI.

The system will queue the document for background processing through cron.

Alternatively, click **Process Now** to process it immediately.



Once processing is complete, the extracted information appears in the available tabs.

OCR Documents OCR Queue Logs Settings

New OCR Queue Hoá đơn 1

Logs 2

1/1 < >

Confirm & Create Re-extract

Draft Processing **Extracted** Created

Invoice Header Invoice Lines Totals Extraction Info

DOCUMENT

Invoice Type ☒ Vendor Bill ☐ Customer Invoice

Invoice Number 166402260806978

Invoice Date Aug 20

Due Date

Currency VND

PARTNER

Partner Unknown Partner (OCR)

+ **Step 5:** Review the extracted information and make any necessary corrections.

Then click **Confirm & Create** to create the corresponding Odoo record.

OCR Documents OCR Queue Logs Settings

New OCR Queue Hoá đơn 1

Logs 2

Confirm & Create Re-extract

Invoice Header Invoice Lines Totals Extraction Info

DOCUMENT

This step can be skipped if the system is configured to create the record automatically when all extracted information is complete and valid.

+ **Step 6:** Once the record has been created successfully, click the **Invoice** smart button to open the newly created record.

OCR Documents OCR Queue Logs Settings

New OCR Queue / Hoá đơn 1

Logs 4 Invoice

1/1 < >

Draft Processing Extracted Created

Document Preview



DOCUMENT INFO

Name	Hoá đơn 1
Document Type	Invoice
MIME Type	image/jpeg
Company	My Company (San Francisco)
Uploaded by	Mitchell Admin

Users can then continue with the standard invoice workflow in Odoo.

OCR Documents OCR Queue Logs Settings

New OCR Queue / Hoá đơn 1
Draft Bill (166402260806978)

Source Document

1/1 < >

Confirm Cancel Draft Posted

☒ Bill ☐ Receipt

Draft

Vendor	Unknown Partner (OCR)	Bill Date	Aug 20
Bill Reference	166402260806978	Accounting Date	Aug 22
Auto-Complete ?	Select an old purchase document	Payment Reference ?	Use Bill Reference
Recipient Bank ?		Due Date	Date or Payment Terms
		Journal	Purchases in VND
		1 USD = 26,330.01C VND	

Invoice Lines Journal Items Other Info

Product	Account	Quantity	Price Taxes	Amount
---------	---------	----------	-------------	--------

Bulk Upload

In addition to processing one document at a time, users can upload and process multiple documents in a single batch using **Bulk Upload**.

+ Step 1: Click **Bulk Upload**, for example from the Invoice section.

OCR Documents

OCR Queue

Logs

Settings

New

Bulk Upload

OCR Queue

Q

Status

X

Search...

☐	Name	Document T...	State	Uploaded	Uploaded by	Partner
▶ Created (1)						

+ Step 2: Select the Document Type.

Click **Files** to select multiple documents. Then click **Upload & Process** to start OCR processing.

Bulk Upload

Upload Multiple Documents

Select multiple files at once (PDF, image, XML). Use **Upload & Process** to queue AI extraction immediately, or **Upload Only** to review before extracting.

Document Type

Invoice

Company

My Company (San Francisco)

1787122302433_2064099192633690043_1040939362869920364_1306b175ca0ae62b739014e4427dc284.jpg

JPG

✓

1787131426741_2064099192633690043_4860363942404230765_3f2626203cde9a76521fb673af3065c5.jpg

JPG

✓

Files

2 file(s) selected

Upload & Process

Upload Only

Cancel

After the upload is complete, the documents appear in the uploaded document list.

OCR Documents

OCR Queue

Logs

Settings

New

Bulk Upload

Uploaded Documents

Q

State

X

Search...

1-1/1

<

>

☐	Name	Documen...	State	Uploaded	Uploaded by	Partner	Invoice #	Total	Created R...
▼ Processing (2)									
☐	1787131426741_206...	Invoice	Processi...	Aug 22, 4:00 PM	Mitchell Admi			0.00	
☐	1787122302433_206...	Invoice	Processi...	Aug 22, 4:00 PM	Mitchell Admi			0.00	

Users can also upload documents directly from:

Invoicing > Customers > Invoices

Invoicing Customers Vendors Accounting Review Reporting Configuration							
New Upload		OCR Upload	Invoices	Invoices or Receipts		1-22 / 22	
Number	Customer	Invoice Date	Due Date	Tax Excluded	Total	Status	
INV/2026/00010	Suzuki	Aug 19	3 days ago	300 ₦	300 ₦	Posted	
INV/2026/00011	Unknown Partner (OCR)	Aug 11		104,000 ₦	104,000 ₦	Paid	
INV/2026/00008	LightsUp	Aug 8	14 days ago	750 ₦	750 ₦	Posted	
INV/2026/00008	LightsUp	Aug 8	14 days ago	\$ 750.00	\$ 750.00	Posted	
INV/2026/00002	Acme Corporation	Aug 6	14 days ago	41,750 ₦	44,750 ₦	Posted	
INV/2026/00002	Acme Corporation	Aug 6	14 days ago	\$ 41,750.00	\$ 46,250.00	Posted	
INV/2026/00003	Acme Corporation	Aug 5	14 days ago	19,250 ₦	20,000 ₦	Posted	

or:

Invoicing > Vendors > Bills

Invoicing Customers Vendors Accounting Review Reporting Configuration							
New Upload		OCR Upload	Bills	Bills or Receipt		1-9 / 9	
Number	Vendor	Bill Date	Due Date	Reference	Tax Excluded	Total	Status
/	Unknown Partner (OCR)	Aug 20		166402260806978	-25,300 ₦	-25,300 ₦	Draft
/	#Created by: Mitchell Admin		Yesterday		\$ 0.00	\$ 0.00	Draft
EXP/2026/08/0001	YourCompany, Mitchell Admin	Aug 20		BreakFast	\$ -17.39	\$ -20.00	Paid
BILL/2026/08/0001	Ready Mat	Aug 1	Next month		-30 ₦	-30 ₦	Posted
BILL/2026/08/0001	Ready Mat	Aug 1	Next month		\$ -30.00	\$ -30.00	Posted
BILL/2026/07/0001	Gemini Furniture	Jul 19	14 days ago	INV/2026/0057	-622 ₦	-622 ₦	Posted
BILL/2026/07/0001	Gemini Furniture	Jul 19	14 days ago	INV/2026/0057	\$ -622.27	\$ -622.27	Posted
/	Unknown Partner (OCR)	Jan 7, 2018		2035 02 20180106 0463	-41,000 ₦	-41,000 ₦	Draft
BILL/2010/01/0001	Unknown Partner (OCR)	Jan 7, 2010		HM/2009N-0059660	-1,500,000 ₦	-1,500,000 ₦	Paid
					\$ -729.17 ?	\$ -731.78 ?	

Document-Specific Features

Split Multiple Purchase Orders from One File

The Purchase Order OCR workflow can split a single file when it contains multiple purchase orders.

+ Step 1: Upload a file containing multiple purchase orders and set:

Document Type = Purchase Order

OCR Documents OCR Queue Logs Settings

New OCR Queue New  

Extract with AI Split into Documents Process Now

Draft Processing Extracted Created

Document Preview



PDF — click the link above to open in a new tab

odoo_ocr_purchase_orders_10.pdf   Remove File

PO Header PO Lines PO Totals Extraction Info

Send message Log note Activity

Today

Administrator 9:58 AM
Creating a new record...

DOCUMENT INFO

Name	Test 10
Document Type	Purchase Order
MIME Type	application/pdf
Uploaded by	Administrator

+ Step 2: Click **Split into Documents** to split the file automatically.

OCR Documents OCR Queue Logs Settings

New OCR Queue Test 10 

1 / 1 < >

Extract with AI Split into Documents Process Now

Draft Processing Extracted Created

Document Preview



/web/content/ocr.document/66/file/odoo_ocr_purchase_orders_10.pdf

PDF — click the link above to open in a new tab

odoo_ocr_purchase_orders_10.pdf    Remove File

PO Header PO Lines PO Totals Extraction Info

Send message Log note Activity

Today

Administrator 10:01 AM
OCR Document Queue Entry created

DOCUMENT INFO

Name	Test 10
Document Type	Purchase Order
MIME Type	application/pdf
Uploaded by	Administrator

If you click **Extract with AI** or **Process Now** before splitting, the system will detect that the file contains multiple purchase orders and prompt you to use **Split into Documents** first.

OCR Documents OCR Queue Logs Settings

New OCR Queue Test 10 Logs 3 1/1 < >

Split into Documents Confirm & Create Re-extract Draft Processing **Extracted** Created

This file appears to contain multiple purchase orders (10 detected). Only the first was extracted — click **Split into Documents** above to process them all.

Document Preview



/web/content/ocr.document/66/file/odoo_ocr_purchase_orders_10.pdf

PDF — click the link above to open in a new tab

PO Header PO Lines PO Totals **Extraction Info**

DOCUMENT INFO

Name Test 10

Document Type Purchase Order

MIME Type application/pdf

Uploaded by Administrator

EXTRACTION

Extraction Model gemini-2.5-pro

+ **Step 3:** Once the file has been split, the system displays the individual purchase orders.

Click **Extract with AI** to process the newly separated documents.

OCR Documents OCR Queue Logs Settings

New OCR Queue Test 10 Logs 3 1/1 < >

Draft Processing Extracted Created **Split**

PDF — click the link above to open in a new tab

Uploaded by Administrator

PO Header PO Lines PO Totals **Extraction Info** **Documents in File**

Child Count 10

Child Created Count 0

Child Review Count 0

Child Failed Count 0

Extract with AI

First Page	Last Page	Document Type	State	Target Display Name	
1	1	Purchase Order	Draft		
2	2	Purchase Order	Draft		
3	3	Purchase Order	Draft		
4	4	Purchase Order	Draft		
5	5	Purchase Order	Draft		
6	6	Purchase Order	Draft		
7	7	Purchase Order	Draft		

#

Automatically Match Invoices with Purchase Orders

When an invoice is processed with OCR, the system can automatically look for existing Purchase Orders with matching information. This helps users quickly find the relevant Purchase Order without searching for it manually.

Purchase Orders with an **Order Date** closer to the **Invoice Date** are ranked higher, especially when the dates are within **90 days**. Purchase Orders outside this period can still appear as suggestions, but they are ranked lower.

+ Step 1: Prepare the Purchase Order

Create or open a Purchase Order in Odoo.

Enter the required information, including:

- **Vendor**
- **Products**

Then click **Confirm Order** to confirm the Purchase Order.

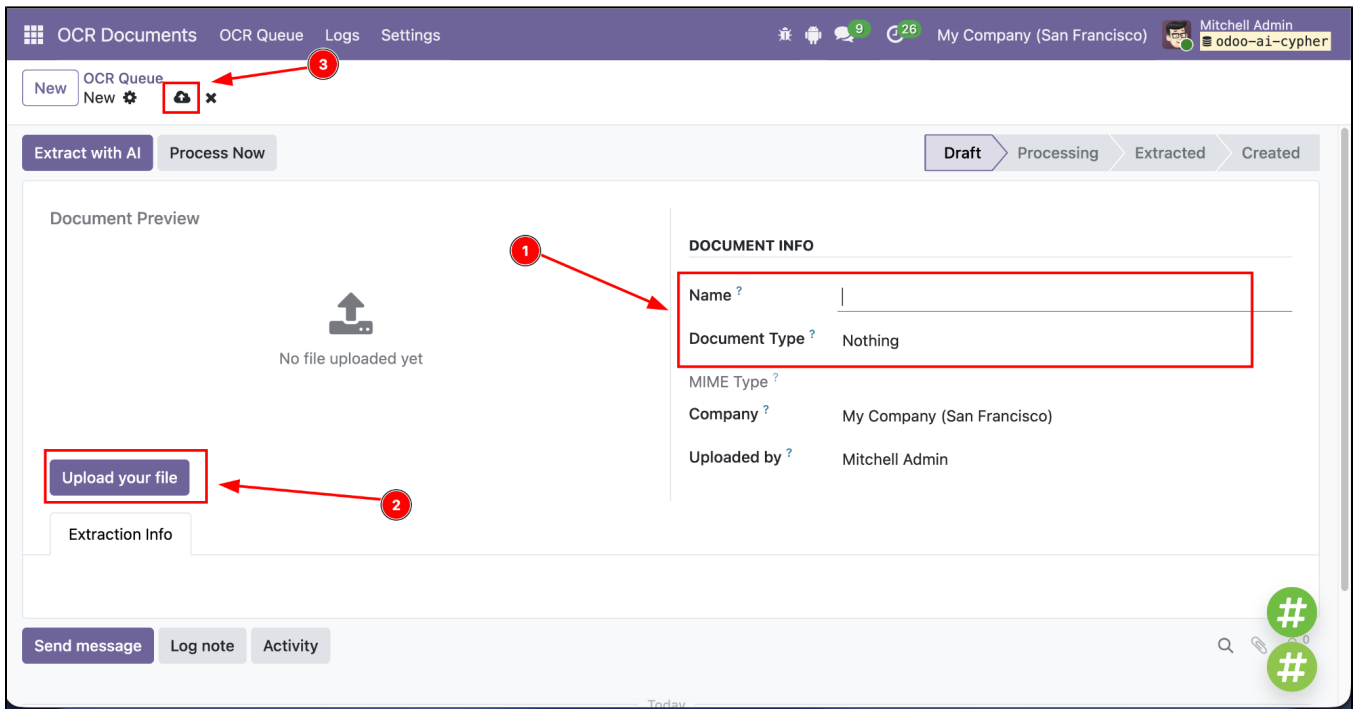
The screenshot shows the Odoo Purchase Order interface for a Request for Quotation (RFQ) P00105. The interface includes a top navigation bar with 'Purchase', 'Orders', 'Products', 'Reporting', and 'Configuration'. A 'New' button and a 'Price Comparison' button are visible. The main area has a 'Send RFQ' button and a 'Confirm Order' button (highlighted with a red box and arrow 1). Below this, the 'Request for Quotation' section shows the RFQ number 'P00105' and the 'Vendor' field (highlighted with a red box and arrow 2) set to 'VIETTEL GROUP - 0100109106'. The 'Order Deadline' is 'Sep 18, 2:44 PM' and the 'Expected Arrival' is 'Sep 18, 2:44 PM'. The 'Deliver To' field is 'YourCompany: Receipts'. The 'Products' table (highlighted with a red box and arrow 3) lists two items: 'Samsung Galaxy Note 10' (Quantity: 6.00, Unit Price: 14,990,000, Amount: 89,940,000) and 'Samsung Galaxy Note 10 Plus' (Quantity: 4.00, Unit Price: 18,990,000, Amount: 75,960,000). The interface also includes a 'Send RFQ' button and a 'Confirm Order' button. The bottom of the interface has a 'Add a product' button and a 'Catalog' link.

Product	Quantity	Unit Price	Taxes	Amount
Samsung Galaxy Note 10	6.00	14,990,000...	0% Imports	89,940,000 d
Samsung Galaxy Note 10 Plus	4.00	18,990,000...	0% Imports	75,960,000 d

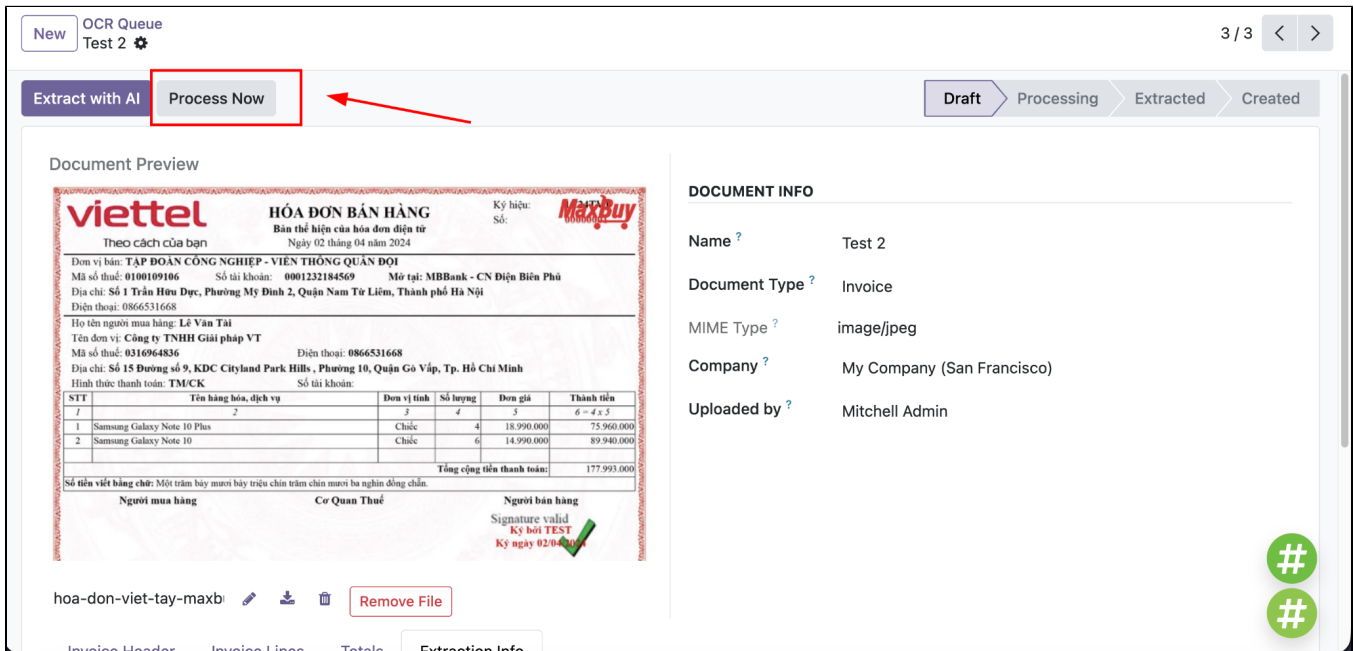
+ Step 2: Upload and Process the Invoice

Create a new OCR document and enter:

- **Name**
- **Document Type:** Select **Invoice**



Upload the invoice file, then click **Process Now** to run OCR.



+ Step 3: Review the Matching Results

After OCR processing is complete, open the **PO Matching** tab. The system compares the extracted invoice information with existing Purchase Orders, including:

- Product
- Quantity
- Price

Matching Purchase Orders are listed under **Suggested POs**.

New

OCR Queue
Test 2

Logs
5

3 / 3

Confirm & Create

Re-extract

Draft

Processing

Extracted

Created

Invoice Header

Invoice Lines

Totals

PO Matching

Extraction Info

Deviation detected:

2 line(s) with deviation — Samsung Galaxy Note 10: qty Δ +24.00, price +0.0%; Samsung Galaxy Note 10 Plus: qty Δ +16.00, price +0.0%

Matched PO ?

P00105

Suggested POs ?

P00105

P00104

P00062

Description	Product	Ordered	Received	Invoiced (pr...	Invoicing now	PO Price	Invoice Price	Price Dev %
Samsung Galaxy Note 10	Samsung Galaxy Note 10	6.00	0.00	18.00	6.00	14,990,000....	14,990,000....	0.00
Samsung Galaxy Note 10 ...	Samsung Galaxy Note 1...	4.00	0.00	12.00	4.00	18,990,000....	18,990,000....	0.00

Send message

Log note

Activity

The **Matched PO** field shows the Purchase Order selected for the invoice.

The system may automatically select the most suitable Purchase Order, or you can choose the correct one from the suggested list.

Before continuing, review the suggested matches and make sure the **Matched PO** corresponds to the invoice.

+ Step 4: Create the Invoice

Once the correct Purchase Order has been selected, click **Confirm & Create**.

New

OCR Queue
Test 2

Logs
5

3 / 3

Confirm & Create

Re-extract

Draft

Processing

Extracted

Created

Document Preview

viettel

HÓA ĐƠN BÁN HÀNG

Ký hiệu: **MaxBuy**

Số: **MaxBuy**

Theo cách của bạn

Bản thể hiện của hóa đơn điện tử

Ngày 02 tháng 04 năm 2024

Đơn vị bán: TẬP ĐOÀN CÔNG NGHIỆP - VIỄN THÔNG QUỐC DỘI

Mã số thuế: 0100109106

Số tài khoản: 0001232184569

Mở tại: MBBank - CN Điện Biên Phủ

Địa chỉ: Số 1 Trần Hưng Đạo, Phường Mỹ Đình 2, Quận Nam Từ Liêm, Thành phố Hà Nội

Điện thoại: 0866531668

Họ tên người mua hàng: Lê Văn Tài

Tên đơn vị: Công ty TNHH Giải pháp VT

Mã số thuế: 0316964836

Điện thoại: 0866531668

Địa chỉ: Số 15 Đường số 9, KDC Cityland Park Hills, Phường 10, Quận Gò Vấp, Tp. Hồ Chí Minh

Hình thức thanh toán: TMUCK

Số tài khoản:

STT	Tên hàng hóa, dịch vụ	Đơn vị tính	Số lượng	Đơn giá	Thành tiền
1	Samsung Galaxy Note 10 Plus	Chiếc	4	18.990.000	75.960.000
2	Samsung Galaxy Note 10	Chiếc	6	14.990.000	89.940.000
Tổng cộng tiền thanh toán:					177.993.000

Số tiền viết bằng chữ: Một trăm bảy mươi bảy triệu chín trăm chín mươi ba nghìn đồng chẵn.

Người mua hàng

Cơ Quan Thuế

Người bán hàng

Signature valid

Ký bởi TEST

Ký ngày 02/04/2024

DOCUMENT INFO

Name ?

Test 2

Document Type ?

Invoice

MIME Type ?

image/jpeg

Company ?

My Company (San Francisco)

Uploaded by ?

Mitchell Admin

Invoice Header

Invoice Lines

Totals

PO Matching

Extraction Info

The system creates the Invoice and automatically links it to the selected **Matched PO**.

Purchase Orders Products Reporting Configuration My Company (San Francisco)

New ... / P00105 / Draft Bill Logs 6 Invoice 1/1 < >

Draft Processing Extracted Created

Document Preview

DOCUMENT INFO

Name: Test 2

Document Type: Invoice

MIME Type: image/jpeg

Company: My Company (San Francisco)

Uploaded by: Mitchell Admin

Invoice Header Invoice Lines Totals PO Matching Extraction Info

+ Step 5: View the Linked Records

After the Invoice is created, you can open ther side:

- From the **Invoice**, use the Purchase Order related records directly from either link to open the related Purchase Order.

OCR Documents OCR Queue Logs Settings My Company (San Francisco) Mitchell Admin odoo-ai-cypher

New OCR Queue / Test 2 Purchases P00105 Source Document 1/1 < >

Confirm Cancel Draft Posted

This document might be a duplicate of Draft (165,900,000 đ) ... (View all) Delete all duplicates

☒ Bill ☐ Receipt

BILL/2024/04/0001

Vendor ? VIETTEL GROUP
Cau Giay Ward
Vietnam
0100109106

Bill Reference ?

Auto-Complete ? Select a purchase document

Bill Date ? Apr 2, 2024

Accounting Date ? Apr 30, 2024

Payment Reference ? Use Bill Reference

Recipient Bank ?

Due Date ? Date or Payment Terms

Journal ? Purchases in VND

1 USD = 26,330,011 VND

Invoice Lines Other Info PO Matching (OCR)

- From the **Purchase Order**, use the **Vendor Bills** button to open the related invoice.

PurchaseOrdersProductsReportingConfiguration

New

Requests for Quotation
P00105

Bill Matching

Vendor Bills
1

Price Comparison

Receipt
1

1 / 1

Receive

Upload Bill

Send PO

Acknowledge

Print

Cancel

RFQ

RFQ Sent

Purchase Order

Purchase Order

☆ P00105

Vendor ?
VIETTEL GROUP - 0100109106

Confirmation Date
Sep 18, 3:12 PM

Vendor Reference ?
Expected Arrival ?
Sep 18, 2:44 PM

Agreement
☐ Ask confirmation

Currency
VND

Deliver To ?
YourCompany: Receipts

Products

Other Information

Product	Quantity	Received	Billed	Unit Price	Taxes	Amount
Samsung Galaxy Note 10	6.00	0.00	6.00	14,990,000....	0% Imports	89,940,000 d
Samsung Galaxy Note 10 Plus	4.00	0.00	4.00	18,990,000....	0% Imports	75,960,000 d

Add a product

Add a section

Add a note

Catalog