

Easy Inventory & Shelf Management

User Manual — Warehouse Heat-Map Dashboard for Odoo 19

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1. What this module does

Easy Inventory & Shelf Management adds two screens to the Odoo Inventory app. The **Shelf Dashboard** summarises your stock at a glance: KPI cards, open alerts, and a library of six ready-made reports you can preview on screen or download as PDF / Excel. The **Floor Plan** shows your warehouse as a map: every shelf, rack slot or bin is drawn as a rectangle in its real physical position, coloured — and visually "filled up" — by how full it is.

The module never changes your stock quantities by itself. It is a **window onto** standard Odoo Inventory data — every action you launch from it (transfers, cycle counts) is a normal Odoo Inventory operation.

2. The two screens: Shelf Dashboard and Floor Plan

Both live directly under the Inventory app's main menu:

Menu	What it is for	Typical user
Inventory > Shelf Dashboard	Numbers and analysis: KPI cards, the open-alerts strip, and the Reports button with all six reports. Click any KPI card to open the underlying Odoo records.	Managers, planners, auditors
Inventory > Floor Plan	The visual warehouse map: one tab per zone, the colour heat map, bin search, the barcode box, the bin detail panel with quick actions, and the layout editor.	Everyone on the warehouse floor

Both screens share the same **filter bar** (Warehouse, Zone, Category, period) and the same **auto-refresh** selector (manual / 1 / 5 / 15 minutes — handy for a wall-mounted monitor). Your last filters and zone are remembered the next time you open either screen.

3. Who can do what (user roles)

Access is controlled from `Settings > Users & Companies > Users`, section **Inventory Dashboard**. There are three levels:

Role	Can do	Cannot do
Manager	Everything: both screens, all reports and exports, create zones, edit the floor-plan layout, assign products to bins, manage alerts, change settings.	—
Warehouse Operator	View both screens, scan barcodes, launch Putaway / Internal Transfer / Cycle Count from a bin, see which products are slotted to a bin.	Edit the floor-plan layout, create zones, change slotting.
Auditor (Read-only)	View both screens and all reports; download PDF / Excel exports.	Any quick action, any configuration.

Tip: users who already have the Odoo Inventory *Administrator* right automatically receive the dashboard **Manager** role — no extra setup needed for them.

4. First-time setup in 5 steps (Manager)

Step 1 — Create a zone.
Go to `Inventory > Configuration > Shelf Dashboard > Zones / Floor Plans` and click **New**. A zone is one floor or area of a warehouse — it becomes one tab on the Floor Plan. Give it a clear name (e.g. "Ground Floor — Aisle A") and pick its warehouse. Optionally pick a **Floor Background Color** — the floor canvas behind the bins is drawn in this colour (e.g. a light grey for concrete areas, a light blue for cold storage) — and a **Bin Label Font Size** (6-40, default 10) if the default bin names are too small or too large for your screen.

Step 2 — Assign bins to the zone.

On the zone form, click the **Assign Bins** button at the top. You get an editable list of every internal location in that warehouse. For each bin that belongs to this floor, set the **Dashboard Zone** column to your zone and type its **Capacity** (the maximum quantity the bin can hold). Rows already assigned turn green. Click out of the row to save it.

Step 3 — Set capacities (if you skipped them).

The heat map colours a bin by *quantity on hand ÷ capacity*. A bin with capacity 0 always shows as grey "Empty", so give every bin a realistic capacity. You can also set a **Reorder Point** per bin — the Reorder Report flags bins that fall below it.

Step 4 — Position the bins on the map.

Open `Inventory > Floor Plan`, select your zone's tab and click **Edit Layout**. New bins all start stacked in the top-left corner, so begin with **Auto-Arrange** to spread them into a tidy grid, then drag each one to its real physical position. Full details of the editor are in section 8. Click **Save Layout** when done.

Step 5 — Give your team access.

In `Settings > Users`, set each user's **Inventory Dashboard** level: Manager, Warehouse Operator, or Auditor (see section 3). That's it — both screens are live.

Optional next step: decide which products belong in which bin (**slotting**, section 10). Odoo then puts goods away into the right bin automatically, and the Floor Plan flags stock that has drifted somewhere else.

5. The Shelf Dashboard: KPIs, alerts and reports

Open `Inventory > Shelf Dashboard`. Everything on this screen follows the filter bar at the top:

Area	What it shows
KPI cards	Total SKUs, Total Stock Value, Low-Stock Bins, Overstocked Bins, Pending Transfers, Open Alerts. Click any card to open the underlying Odoo records.
Open Alerts strip	One yellow badge per live alert (bin + alert type), so problems are visible the moment the screen opens. See section 13.
Reports button (top right)	The six-report library. Click a report name for an on-screen preview, or use the inline buttons to download PDF / Excel directly. See section 12.

The refresh selector at the top right reloads the numbers automatically every 1, 5 or 15 minutes; the circular-arrow button refreshes immediately.

6. The Floor Plan: reading the heat map

Open `Inventory > Floor Plan`. Each zone is a tab; the map below draws every bin of that zone. A bin tells you its state in **three redundant ways**, so you can read it even on a poor screen or in print:

- **Colour** — the six status colours in the table below.
- **Fill level** — the coloured area rises from the bottom of the bin like a tank filling up: a bin at 30% is only 30% coloured. The pale strip on top is free space.
- **Text** — bins large enough show their fill percentage (or the word **BLOCKED**) under the bin name. Hover any bin for the full numbers.

Colour	Band	Fill %	Meaning
Empty	Empty — drawn with a dashed outline	0%	No stock in the bin (or no capacity configured).
Low	Low	1 – 24%	Below reorder threshold — replenishment candidate.
Normal	Normal	25 – 74%	Healthy stock level.
High	High	75 – 94%	Approaching capacity — monitor.
Overstocked	Overstocked	95%+	At or over configured capacity.
Blocked	Blocked — drawn with diagonal stripes	n/a	Manually flagged (quality hold) — overrides all other colours.

Hovering a bin shows a tooltip card with its status, fill %, quantity on hand, capacity and number of products — plus a reminder that clicking opens the full detail panel (section 9).

7. The Floor Plan: finding your way around

Control	What it does
Fit to screen (arrows button)	Scales and centres the whole floor plan in the window. The map also fits itself automatically when you open it or switch zones.
Zoom	Mouse wheel (zooms on the point under your cursor) or the +/- buttons.
Pan	Click and drag anywhere on the map. A drag never opens a bin by accident — only a clean click does.
Legend chips (top right)	Each status chip shows a live count of its bins, e.g. "Overstocked 3". Click a chip to filter: every other bin fades out so you see only, say, the blocked bins. Click the same chip again to show everything.
Find a bin... box	Type part of a bin name; all non-matching bins fade out while you type. Use the × button to clear.
Heat Map button	Toggles the colours off, leaving a plain outline view of the floor.
Edit Layout (Managers)	Switches to the layout editor to drag, resize and rotate bins and to set the bin label font size (section 8).

Tip: the toolbar reminds you of the basics — *scroll to zoom, drag to pan, click a bin for details*. A bin found by barcode scan flashes orange so you can spot it instantly, even on a large plan.

8. Editing the floor-plan layout (Managers)

On the Floor Plan, click **Edit Layout** to switch the map into the editor. Nothing you do here touches your stock — you are only drawing where the bins physically are.

Action	How
Move a bin	Drag it. It follows the cursor exactly and snaps to the grid while Snap is on.
Resize a bin	Click it to select, then drag one of the eight round handles on its corners and edges. The opposite edge stays anchored.
Exact numbers	With a bin selected, type into X, Y, Width, Height or Rotation in the right-hand panel — the plan updates as you type.
Nudge precisely	Arrow keys move the selected bin one unit; hold <code>[Shift]</code> for a full grid step. <code>[Esc]</code> deselects.
Auto-Arrange	Spreads every bin over a tidy grid. New bins all start at the same spot, so this is the fastest way to begin a layout.
Snap & grid size	The Snap button toggles grid snapping; the dropdown beside it sets the grid step (5 / 10 / 20 / 50 units). Turn Snap off for completely free positioning.
Apply this size to all bins	Copies the selected bin's width and height onto every bin in the zone — handy when a whole aisle uses identical racking.
Bin Label Font Size	The slider at the top of the panel resizes every bin name on this zone's plan, with a live preview. It is saved with the layout and also applies to the normal Floor Plan view.
Bin list	The list at the bottom of the panel selects any bin by name — useful when a bin has been dragged off the visible area.

Nothing is saved until you click Save Layout. While you have unsaved work an **Unsaved changes** badge appears next to the title, and closing the editor asks you to confirm before discarding.

9. Working with a bin: the detail panel & quick actions

Clicking a bin opens a panel on the right with: its status badge, a **colour-coded fill bar** showing the % of capacity used, quantity on hand vs capacity, reorder point, date of the last stock movement, and a line per product currently in the bin (with lot number and expiry date where applicable).

Operators and Managers also see three **quick action** buttons:

Button	What happens
Putaway	Opens a new internal transfer with this bin pre-filled as the <i>destination</i> — use it when goods arrive at the bin.
Internal Transfer	Opens a new internal transfer with this bin pre-filled as the <i>source</i> — use it to move goods out of the bin.
Cycle Count	Opens the standard Odoo inventory-count list filtered to this bin, so you can enter counted quantities and apply them.

Tip: after completing a transfer or count, go back to the Floor Plan and press the refresh button — the bin's colour and fill level update immediately.

10. Assigning products to bins (slotting)

Slotting is deciding which products belong in which bin. Once a product is assigned to a bin, Odoo automatically puts it away there when it is received, and the Floor Plan can show you stock that is sitting somewhere else.

The module stores these assignments as standard Odoo **putaway rules** — it does not keep a private list — so anything you set here is honoured by normal Odoo receipts and transfers, and is visible under `Inventory > Configuration > Putaway Rules` like any other rule.

Requires Storage Locations. Slotting only appears when **Storage Locations** is enabled in `Inventory > Configuration > Settings > Warehouse` . Without it Odoo has no sublocations to put products away into.

Assigning one product at a time (from the map)

Click a bin on the Floor Plan. Below the stock list, the panel has a **Products assigned here** section:

- The list shows every product (or product category) slotted to this bin.
- Managers get a search box — *Assign a product to this bin...* — pick a product and it is slotted immediately. Products already assigned are not offered again.
- The **x** next to an entry removes that assignment.
- **Categories & priorities** opens the full putaway-rule list for the bin, where you can slot a whole product category at once or set rule priorities.

Assigning many products at once (from the zone)

Open `Inventory > Configuration > Shelf Dashboard > Zones / Floor Plans` , open a zone, and click **Assign Products** in the header. You get one editable list of every assignment in the zone: pick the product and the bin it belongs in, row after row. This is the fastest way to slot a whole aisle.

Each row targets **either a single product or a whole product category**, never both — as soon as you fill one, the other is greyed out. Clear it again if you want to switch. Use a category when every item of that family lives in the same bin, and a product when you need one specific item slotted.

Spotting gaps and mistakes

Where	What it tells you
Unslotted button (Floor Plan toolbar)	Shows how many bins have no product assigned and, when switched on, fades out every bin that is already slotted — so the empty ones stand out. Click it again to show everything.
Bin tooltip	An Assigned line with the number of products slotted to that bin.
misplaced badge in the bin panel	Counts products physically in this bin that are slotted to a <i>different</i> bin. Each one is marked with a warning triangle in the stock list. Use the Internal Transfer quick action to move them to where they belong.

A product with no rule anywhere is *unslotted*, not misplaced — it simply has no home yet.

11. Using a barcode scanner

The barcode box in the **Floor Plan** header works three ways — no extra app needed:

- **USB / keyboard-wedge scanner:** just scan while the Floor Plan is open. The scan is picked up automatically.
- **Phone / tablet camera:** tap the camera button next to the box (shown when your device supports it) and point at the barcode.
- **Type it in:** type the code into the box and press .

What happens next depends on what you scanned:

- **A location barcode** (set on the location form in Odoo): the map switches to that bin's zone, highlights the bin with a flashing orange outline, and opens its detail panel.
- **A product barcode** (or internal reference): the Floor Plan finds every bin holding that product and jumps to the first one.

Tip: give your locations barcodes in [Inventory > Configuration > Locations](#) (field *Barcode*), print them, and stick them on the racks — then any operator can find any bin in seconds.

12. Reports: preview, PDF and Excel

On the **Shelf Dashboard**, click the **Reports** button in the header. Each row is one report: click the report **name** to preview the data on screen — nothing downloads until you ask — or click the small red / green buttons to download **PDF** / **Excel** directly. All reports respect the filter bar and the selected period.

Report	Use it to...
Stock Moves	See every incoming / outgoing / internal move in the period, newest first.
ABC Analysis	Rank products by value contribution (A = top 80% of value, B = next 15%, C = rest) and prioritise cycle counting.
Expiry / Lot Tracking	List lots that are expired or expiring within the chosen window, with the bin they sit in. (Requires the Odoo "Expiration Dates" feature.)
Dead / Slow-Moving Stock	Find products on hand with no movement for N days (N is set in Settings, default 90).
Inventory Valuation	See on-hand value per product, biggest first.
Reorder Report	List bins in the Low band or below their reorder point — your replenishment to-do list.

13. Alerts

Once per hour, the module checks every bin on a floor plan and every tracked lot, and raises an alert when a bin enters **Low**, **Overstocked** or **Blocked**, or a lot approaches its expiration date. Alerts appear:

- as the **Open Alerts** KPI card and the yellow badge strip on the Shelf Dashboard, and
- for Managers, in [Inventory > Configuration > Shelf Dashboard > Dashboard Alerts](#).

Work an alert with two buttons: **Acknowledge** ("I've seen it, working on it") and **Resolve** ("fixed"). Alerts also **auto-resolve** when the condition disappears — e.g. after you replenish a Low bin, the next hourly check closes the alert by itself.

Optional: switch on *Create Odoo Activity for Alerts* in Settings and each new alert also schedules a to-do activity for the dashboard Manager, so alerts show up in their activity inbox like any other Odoo task.

14. Settings reference

All settings live in [Inventory > Configuration > Settings](#), section **Shelf Dashboard**:

Setting	Default	Effect
Lot Expiry Alert (Days)	7	Raise an expiry alert when a lot's expiration date is within this many days.
Dead / Slow-Moving Threshold (Days)	90	Products with no movement for this long appear on the Dead / Slow-Moving report.
Create Odoo Activity for Alerts	Off	Also schedule a to-do activity for the Manager on each new alert.

Two scheduled actions run automatically (see [Settings > Technical > Scheduled Actions](#)): the hourly *Sync Bin / Expiry Alerts* and the nightly *KPI Snapshot* that stores one summary row per warehouse per day for fast historical trends.

15. Frequently asked questions & troubleshooting

The Floor Plan says "No floor plan yet".

No zone exists yet (or none for the filtered warehouse). A Manager must create one — section 4, step 1. Managers get a **Create a Zone** button right on that screen.

Some bins suddenly look very faint.

A legend chip filter or a bin search is active — non-matching bins fade out on purpose. Click the highlighted legend chip again (or clear the *Find a bin...* box) to restore the full view.

A bin is only partly coloured.

That is the fill level: the coloured area equals the bin's fill %. The pale area on top is free space. A completely coloured bin is at (or over) capacity.

A bin doesn't appear on the map.

Check three things on the location: it is an **Internal** location, its **Dashboard Zone** field points to the zone you are viewing, and it belongs to the warehouse of that zone.

A bin is always grey even though it has stock.

Its **Capacity** is 0. The fill percentage needs a capacity to divide by — set one on the location (or via the zone's Assign Bins screen).

A bin shows grey diagonal stripes no matter what.

It is flagged **Blocked (Quality Hold)** on the location form. Untick the flag to return it to normal colour bands. Blocked always wins over the fill-based colour.

The bin names on the plan are too small (or too big).

Change **Bin Label Font Size**: either on the zone form ([Inventory > Configuration > Shelf Dashboard > Zones / Floor Plans](#)), or live with the slider in **Edit Layout**, which previews it as you drag. The setting is per zone, so a wall-mounted screen zone can use a larger size than a desk one.

A bin's name disappeared from the plan.

The label is hidden when the bin is too small to fit the text. Either make the bin bigger (drag a handle in Edit Layout) or lower the zone's Bin Label Font Size. The fill percentage line only appears when the bin is roughly three text rows tall.

I can't see the "Products assigned here" section.

Slotting needs **Storage Locations** enabled in [Inventory > Configuration > Settings > Warehouse](#) . The search box for adding a product additionally requires the Manager role — Operators and Auditors see the assignments but cannot change them.

All my bins are stacked in the top-left corner.

They have never been positioned — every new bin starts at 0,0. Open **Edit Layout** and click **Auto-Arrange** to spread them onto a grid, then drag them into their real positions and save.

I clicked a bin but nothing opened.

You most likely dragged a little while clicking — a drag pans the map and deliberately does not open the panel. Click the bin without moving the mouse.

Scanning does nothing.

Make sure the Floor Plan screen is focused and the cursor is *not* inside another text field. For location scans, the location must have its *Barcode* field set; for product scans, the product needs a barcode or internal reference. If the code is unknown you get a "Barcode not recognized" message.

The Expiry / Lot Tracking report says the feature is not installed.

Enable **Expiration Dates** in [Inventory > Configuration > Settings > Traceability](#) (this installs Odoo's product_expiry feature).

Excel export fails.

The server needs the Python package **xlsxwriter**. Ask your administrator to run *pip install xlsxwriter* and restart Odoo.

I edited the layout but a colleague still sees the old one.

Layout positions save immediately for everyone; your colleague just needs to press the refresh button (or wait for their auto-refresh interval).

Who do I contact for help?

Support: imbipul9@gmail.com. Please include your Odoo version and a screenshot.