



USER MANUAL

Easy Construction Firm with AI

A step-by-step guide for first-time users:
settings, forms and every function, with screenshots.



Module **easy_construction_firm** · version 20.0.1.0.0 · Odoo Community
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1 About This Manual

This manual teaches you Easy Construction Firm from zero. You do not need to know Odoo or the module before you start. Follow the chapters in order the first time; later, use the table of contents to jump to the screen you need.

1.1 What the module does

Easy Construction Firm is one Odoo app, called **Construction**, that follows a building project from the first day to the last:

Stage	What you record in the app
1. Land	Land parcels, their owners and documents, the due-diligence checklist and the joint-venture (JV) contract with the land owners.
2. Project	The construction project, its sites, buildings, floors and units (flats, shops, parking).
3. Design	Design brief, drawings and their revisions, transmittals, RFIs, design changes, authority approvals, floor plans and 3D models.
4. Estimation	Bill of Quantities (BOQ), rate library and budget against actual cost.
5. Site	Daily site reports, material requisitions, labour attendance, wage sheets, equipment and photos.
6. Quality and HSE	Inspections, non-conformance reports (NCR), snags, material tests, incidents, toolbox talks and work permits.
7. Subcontractors	Subcontracts, work orders and measurement sheets that become vendor bills.
8. Sales	Unit availability, enquiries, bookings, installments, handover and after-sales tickets.
9. Billing	Interim payment certificates (IPC), variations, retention and the cash-flow forecast.
10. Follow-up	A live dashboard, 29 reports (screen, Excel, PDF) and portals for customers and partners.

1.2 How to read the steps

- A menu path looks like this: **Construction > Land > Land Parcels**. Open the first word in the top bar, then click the next word in the list that drops down.
- A button you must click looks like this: **Save**.
- A field or tab on the screen is written in bold, for example **Project**.
- Numbered lists are actions to do in that order. Boxes marked Rule tell you what the system refuses and why.

NOTE Every screenshot was taken on a real Odoo Community database with the module's demonstration data loaded (project "Lake View Residences", company "My Company (San Francisco)", currency US dollar). Your own names, amounts and currency will differ; the screens and buttons are the same.

1.3 Words you will meet

Word	Meaning
JV contract	Joint-venture agreement: the land owner gives the land, the developer builds, and both share the finished units.
BOQ	Bill of Quantities: the priced list of all work items of a project.
Revision	One version of a drawing (0, A, B ...). Only one revision is the current one.
Transmittal	A formal note that sends drawings to a consultant, contractor or client.
RFI	Request For Information: a question from site to the designer.
NCR	Non-Conformance Report: work that does not meet the specification.
Snag	A small defect to fix before a unit is handed over.
Hold point	An inspection that must pass before the next work can be reported.
IPC	Interim Payment Certificate: the periodic bill to the client for work done.
Retention	A percentage of each payment kept back until the end of the job.
Chatter	The panel on the right of a form, with Send message , Log note and Activity : the history of the record.

2 Getting Started

Three things must be done once, by an administrator, before anyone uses the app: install it, give each user a role, and review the settings.

2.1 Install the module

- 1 Log in to Odoo as an administrator.
- 2 Click the square icon at the top left and choose **Apps**.
- 3 In the search box, type **Easy Construction** and press Enter.
- 4 On the card **Easy Construction Firm with AI**, click **Activate**. Wait until Odoo reloads.

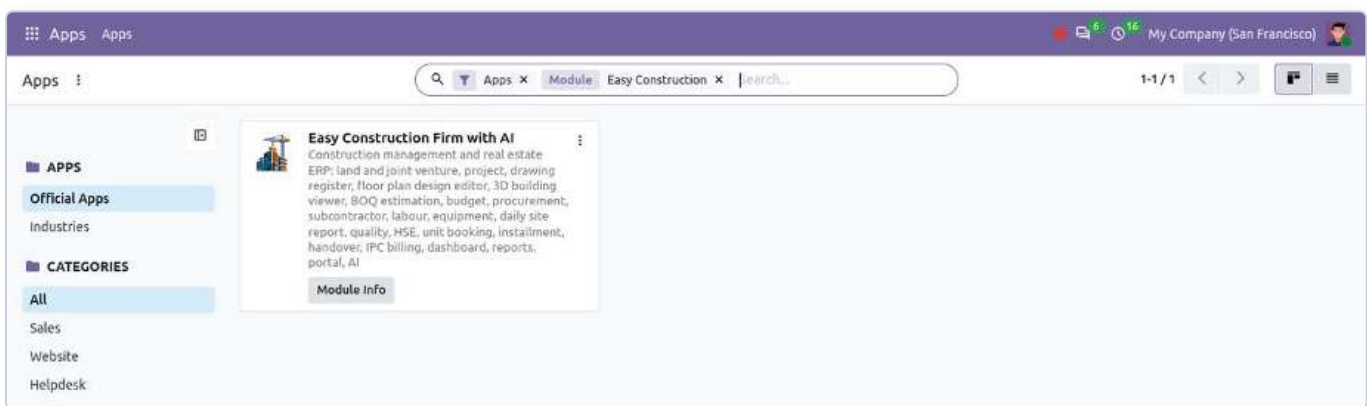


Figure 1. The module card in the Apps screen (shown here after installation).

Odoo installs the apps the module needs by itself: Discuss, Portal, Project, Timesheets, Invoicing, Purchase, Inventory, Attendances, Maintenance, CRM and SMS. No Enterprise app is required.

2.2 Open the Construction app

- 1 Click the square icon at the top left of any screen.
- 2 Click **Construction** in the list.

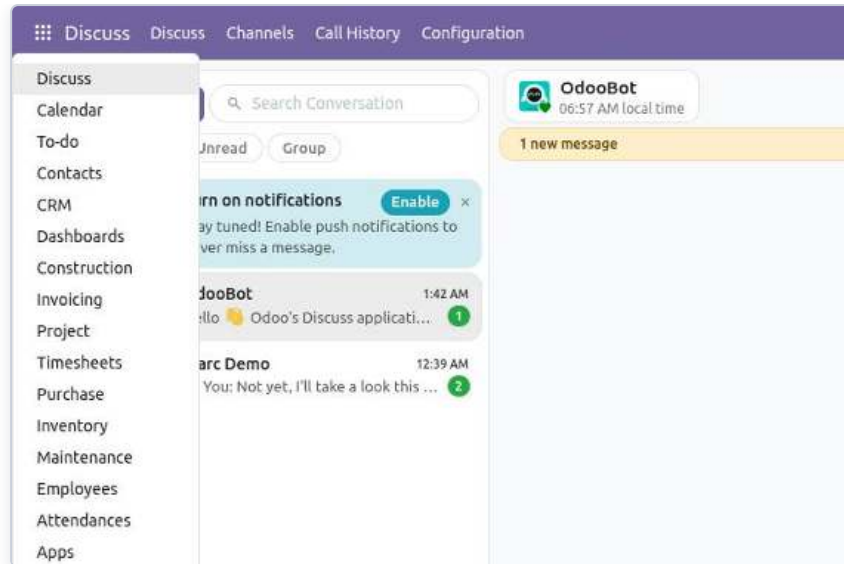


Figure 2. The list of apps. Construction opens the module.

The app opens on the Dashboard. The purple bar at the top is the main menu. It is the same on every screen:

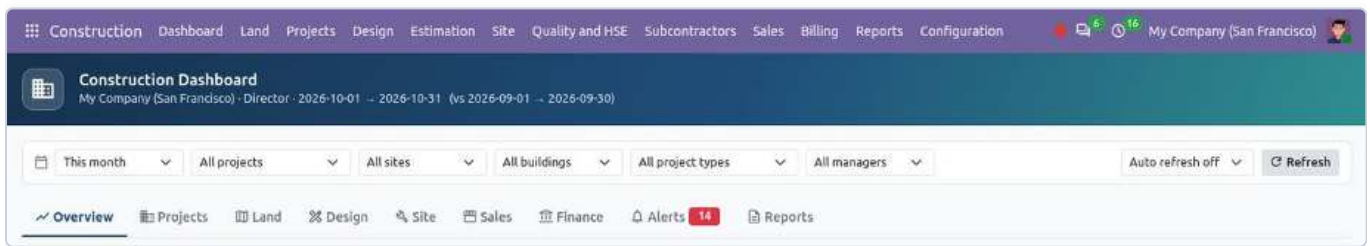


Figure 3. The main menu of the app: Dashboard, Land, Projects, Design, Estimation, Site, Quality and HSE, Subcontractors, Sales, Billing, Reports and Configuration.

NOTE You only see the menus your role allows. A site engineer, for example, does not see Land or Billing.

2.3 Give each user a role

MENU Settings > Users & Companies > Users

Who: Administrator

- 1 Open the user (or click **New** to create one and type the name and email).
- 2 Stay on the **Access Rights** tab and find the section **CONSTRUCTION**.
- 3 In the field **Construction**, choose the role of that person.
- 4 Click the save icon (the small cloud next to the name) or simply leave the screen: Odoo saves by itself.

The screenshot shows the 'Access Rights' tab for the user 'Mitchell Admin'. The user's role is set to 'Administrator'. The 'Companies' section shows 'My Company (San Francisco)' as the default. The 'Access Rights' section is divided into several categories: MASTER DATA, SALES, SERVICES, ACCOUNTING, CONSTRUCTION, and SUPPLY CHAIN. Each category has a list of permissions with dropdown menus to select the role. For example, in the 'CONSTRUCTION' category, the 'Construction' role is assigned to the 'Director' position.

Figure 4. The Construction role on the user form, tab Access Rights.

Role	What the person can do
User	Base access: the dashboard and the records of the projects the person is assigned to.
Site Engineer	Site reports, requisitions, inspections, snags, HSE and labour attendance.
Architect / Designer	Design briefs, drawings, revisions, RFIs, design changes and 3D models.
Land / Legal Officer	Land parcels, land documents, owners and JV contracts.
Procurement / Store	Requisitions, purchases, site inventory and equipment.
HR / Labour Officer	Labour register, attendance, wage sheets and PPE.
Sales	Units, bookings, installments, handover and after-sales.
Accountant	IPCs, variations, retention, payments, budgets and cash flow.
Project Manager	Full access on assigned projects, including approvals.
Director	Full access on all projects, overrides and settings.

RULE Access is per project. Apart from the Director, a user only sees and approves the records of projects where they are the **Project Manager**, one of the **Site Engineers** or a member of the **Construction Team** (see chapter 5). If a colleague cannot see a project, add them to its team.

2.4 Review the settings

MENU

Construction > Configuration > Settings

Who: Administrator with the Director role

Change a value, then click **Save** at the top left. **Discard** cancels your changes.

Construction

Dashboard

Land

Projects

Design

Estimation

Site

Quality and HSE

Subcontractors

Sales

Billing

Reports

Configuration

6

16

My Company (San Francisco)

Save

Discard

Settings

Search...

General Settings

CRM

Calendar

Purchase

Inventory

Maintenance

Invoicing

Project

Timesheets

Construction

Employees

Attendances

Design and Drawings

☒ Design Brief Before Drawings

Drawings can only be registered once the project's design brief is approved.

DWG Converter Program

Full path of the ODA File Converter or of LibreDWG's dwg2dxf, installed on the server. Leave empty to store DWG files without preview.

/usr/bin/dwg2dxf

Revision Numbering

How revision codes are numbered.

0, A, B, C ...

3D Model Size Warning (MB)

Warn when an uploaded 3D model is larger than this size.

200

Design Editor

☒ IFC Export

Download the building drawn in the Design Editor as an IFC4 file.

Default Rebar Ratio (kg/m3)

Reinforcement estimated per cubic metre of concrete when the material gives no ratio.

110.00

☒ MEP Drawing

Plumbing, electrical and HVAC routes and fixtures in the Design Editor.

Cost and Sales

Budget Alert Threshold (%)

Alert the project manager when the actual cost of a BOQ line passes this share of its budget.

90.00

Discount Limit (%)

A booking discount above this percentage needs a Director.

5.00

Late Payment Penalty (% per month)

Simple interest charged on overdue installments, per month. Zero: no penalty.

0.00

Quotation Approval Limit

A selected quotation above this amount needs the Project Manager. Zero: no limit.

0.00

☐ SMS Installment Reminders

Also send installment reminders by SMS, through the SMS gateway configured in Odoo (SMS app).

AI and Dashboard

☐ AI Features

Switch every AI feature on or off for the whole database. Risk scores stay rule based and keep working when AI is off.

AI Output Retention (days)

Stored AI output is removed after this many days.

30

Dashboard Cache (minutes)

Dashboard figures are cached per user for this many minutes. The Refresh button always recomputes.

Figure 5. The Construction settings.

Setting	What it does
Design Brief Before Drawings	When ticked, drawings can only be registered once the project's design brief is approved.
Revision Numbering	How revision codes are numbered: 0, A, B, C ... or 0, 1, 2, 3 ...

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Setting	What it does
DWG Converter Program	Full path of the ODA File Converter or of LibreDWG's dwg2dxf, installed on the server. Leave empty to store DWG files without preview.
3D Model Size Warning (MB)	Warns when an uploaded 3D model is larger than this size.
IFC Export	Lets users download the building drawn in the Design Editor as an IFC4 file.
MEP Drawing	Adds plumbing, electrical and HVAC routes and fixtures to the Design Editor.
Default Rebar Ratio (kg/m3)	Reinforcement estimated per cubic metre of concrete when the material gives no ratio.
Budget Alert Threshold (%)	Alerts the project manager when the actual cost of a BOQ line passes this share of its budget.
Quotation Approval Limit	A selected quotation above this amount needs the Project Manager. Zero: no limit.
Discount Limit (%)	A booking discount above this percentage needs a Director.
SMS Installment Reminders	Also sends installment reminders by SMS, through the SMS gateway configured in Odoo.
Late Payment Penalty (% per month)	Simple interest charged on overdue installments, per month. Zero: no penalty.
AI Features	Switches every AI feature on or off for the whole database. Risk scores are rule based and keep working when AI is off.
AI Output Retention (days)	Stored AI output is removed after this many days.
Dashboard Cache (minutes)	Dashboard figures are kept per user for this many minutes. The Refresh button always recomputes.

2.5 The parts of every screen

All screens of the app are built the same way. Learn these five parts once:

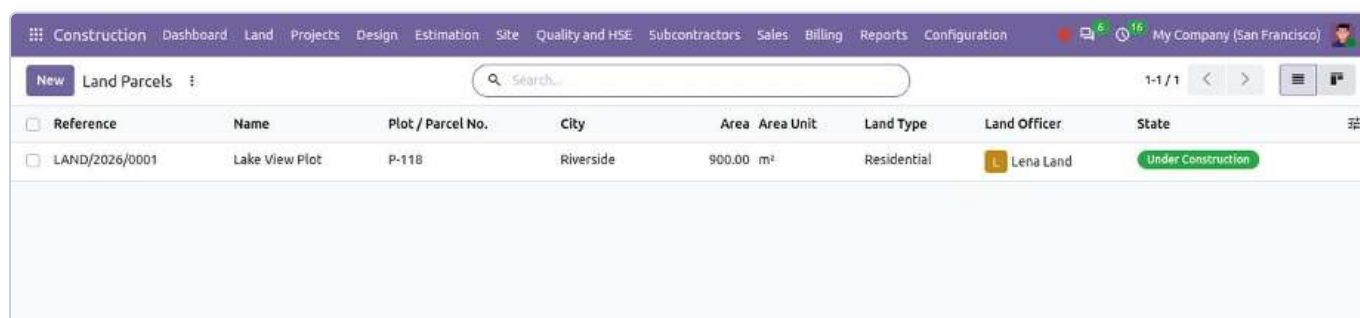


Figure 6. A list screen (here: Land Parcels).

- **New** (top left) creates a record.
- The **search box** (top centre) filters the list: type a word and press Enter. The small arrow inside it opens ready-made filters and groupings.
- Click any line to open its **form**.

- The icons at the top right switch the view (list, cards, pivot ...) when more than one exists.

Name
Lake View Plot

LAND/2026/0001

IDENTIFICATION		LOCATION	
Plot / Parcel No.	P-118	Street	18 Lake Road
Survey No.	S-2210	Street2	Street 2
Area	900.00 m²	City	Riverside
Land Type	Residential	State / Province	
Zoning	Residential R2	Zip	
Road Width	12.00	Country	
		Latitude	23.7806000
		Longitude	90.4193000

MANAGEMENT

Land Officer: Lena Land

Company: My Company (San Francisco)

Purchase Cost: \$ 0.00

Buttons: New, Documents (2), JV Contracts (1), 1/1, Send message, Log note, Activity, Search, Print, Duplicate, Delete.

Planned Activities:

- Due in 19 days: Land document expiring: Land Tax Receipt - TX-2025-331 for Lena Land

Today:

OdooBot 1:41 AM
Land Parcel created

Tabs: Owners, Documents, Due Diligence, Projects, Notes

Figure 7. A form screen (here: a land parcel).

- The **buttons** at the top left of the form move the record to its next step. Only the buttons that are possible now, and allowed for your role, are shown.
- The **status bar** at the top right shows where the record is in its life (the current step is highlighted).
- The small **stat buttons** above the form (Documents, JV Contracts ...) open related records.
- **Tabs** at the bottom of the form hold the lines. Click **Add a line** to add one; click the bin icon to remove one.
- The **gear icon** next to the record name opens **Print**, Duplicate and Delete.
- Odoo saves a form by itself when you leave it. The cloud icon next to the name saves now; the cross discards.

3 First-Time Configuration

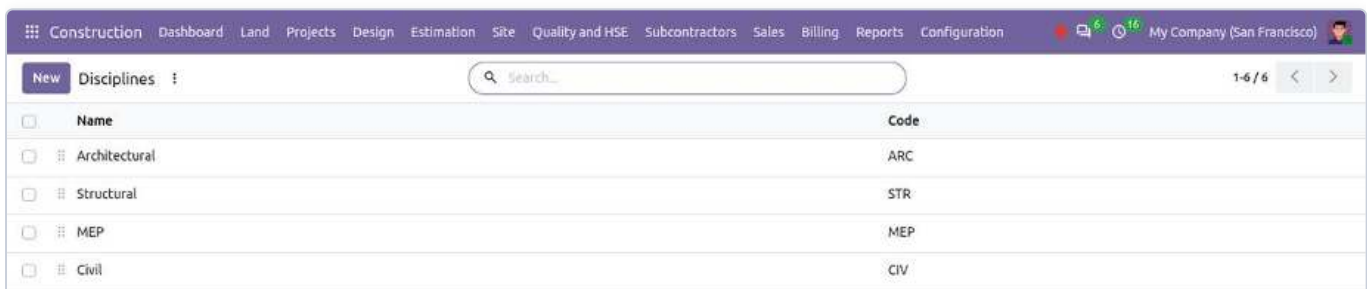
The Configuration menu holds the lists that the other screens pick from. The module comes with sensible values; review them before real work starts.

MENU Construction > Configuration

Who: Director

3.1 Disciplines

Design disciplines group drawings and give each drawing number its middle code (ARC, STR, MEP ...). Click **New**, type the **Name** and the **Code** directly in the list, then press Enter.

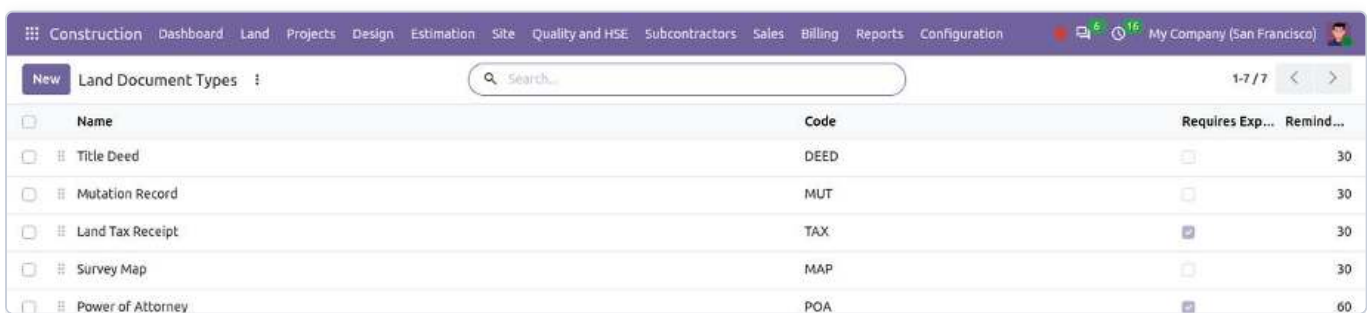


☐	Name	Code
☐	Architectural	ARC
☐	Structural	STR
☐	MEP	MEP
☐	Civil	CIV

Figure 8. Disciplines.

3.2 Land Document Types

The kinds of land paper you keep (title deed, mutation record, tax receipt ...). Tick **Requires Expiry** when a document of this type must carry an expiry date, and set after how many days before expiry the land officer is reminded.



☐	Name	Code	Requires Exp...	Remind...
☐	Title Deed	DEED	☐	30
☐	Mutation Record	MUT	☐	30
☐	Land Tax Receipt	TAX	☒	30
☐	Survey Map	MAP	☐	30
☐	Power of Attorney	POA	☒	60

Figure 9. Land document types with their reminder delay.

3.3 Cost Heads

Cost heads are the families of cost used in budgets and reports: Labour, Materials, Subcontracts, Equipment and Plant, Site Overheads. Every BOQ line points to one cost head.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)		
New Cost Heads Search... 1-5 / 5		
Code	Name	Category
EQP	Equipment and Plant	Equipment
LAB	Labour	Labour
MAT	Materials	Material
OVH	Site Overheads	Overhead

Figure 10. Cost heads.

3.4 Inspection Templates

An inspection template is a reusable checklist. Give it a **Name**, the **Activity** it checks, tick **Is Hold Point** if the next work must wait for it, and list the points to check.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)		
New Inspection Templates Rebar before casting 1 / 1		
Name	Rebar before casting	
Activity	Reinforcement	
Is Hold Point	☒	
Name		
	Bar diameter and spacing as per drawing	☐
	Lap length and anchorage	☐
	Cover blocks in place	☐

Figure 11. An inspection template with its checklist.

3.5 Installment Plans

An installment plan tells how a customer pays for a unit. Each line is a share of the price with a **Trigger**: on booking, a number of days after booking, or a construction milestone.

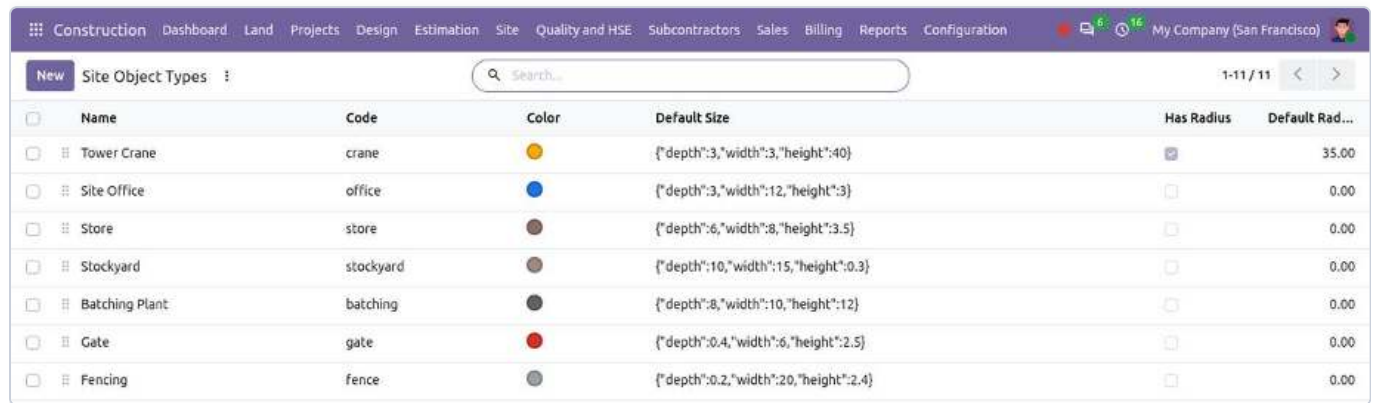
Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)		
New Installment Plans Standard: 10 / 20 / construction linked / handover 1 / 1		
Name	Standard: 10 / 20 / construction linked / handover	
Total Percent	100.00	
Name	Percent (%)	Trigger
On booking	10.00	On Booking
On agreement	20.00	Days after Booking
Foundation complete	15.00	Construction Milestone
Superstructure complete	25.00	Construction Milestone
Finishing complete	20.00	Construction Milestone

Figure 12. An installment plan: 10 % on booking, 20 % after 30 days, the rest on construction milestones.

RULE The lines of a plan must total exactly 100 %.

3.6 Site Object Types

The objects you can place in the Site Layout Planner (tower crane, site office, store, gate ...), with their colour and default size.



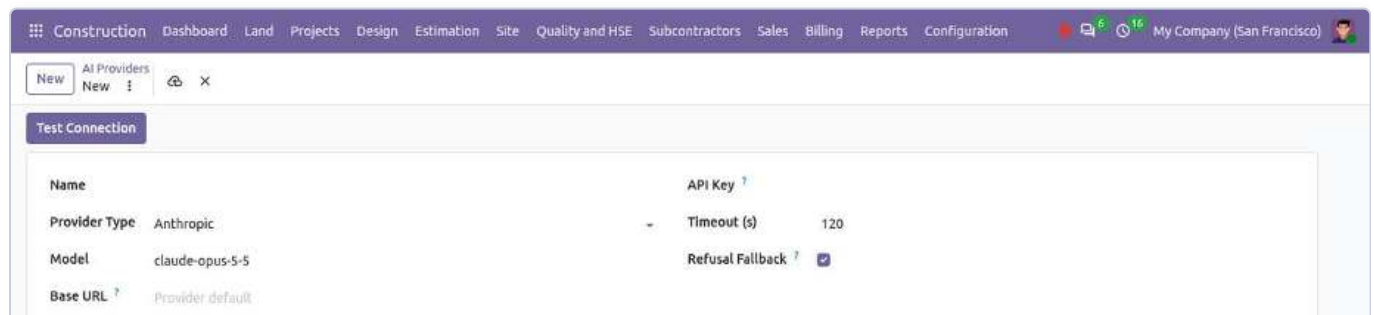
☐	Name	Code	Color	Default Size	Has Radius	Default Rad...
☐	Tower Crane	crane		{"depth":3,"width":3,"height":40}	☒	35.00
☐	Site Office	office		{"depth":3,"width":12,"height":3}	☐	0.00
☐	Store	store		{"depth":6,"width":8,"height":3.5}	☐	0.00
☐	Stockyard	stockyard		{"depth":10,"width":15,"height":0.3}	☐	0.00
☐	Batching Plant	batching		{"depth":8,"width":10,"height":12}	☐	0.00
☐	Gate	gate		{"depth":0.4,"width":6,"height":2.5}	☐	0.00
☐	Fencing	fence		{"depth":0.2,"width":20,"height":2.4}	☐	0.00

Figure 13. Site object types.

3.7 AI Providers, AI Prompts and AI Log

AI is optional. Without a provider, everything else in the module works normally.

- 1 Open **Construction > Configuration > AI Providers** and click **New**.
- 2 Type a **Name**, choose the **Provider Type** (OpenAI-compatible, Anthropic, Google, or Ollama / local server) and the **Model**.
- 3 Paste the **API Key**. Fill **Base URL** only for a private or local server; leave it empty for the provider's public address.
- 4 Click **Test Connection**.



Name	API Key ?
Provider Type Anthropic	Timeout (s) 120
Model claude-opus-5-5	Refusal Fallback ? ☒
Base URL ? Provider default	

Figure 14. A new AI provider.

- The first active provider is the default. A prompt can name another provider for its task.
- **AI Prompts** lists the ten tasks the AI can do (read a title block, read a land document, summarise a contract, summarise a daily report, explain a risk, draft an RFI answer, tag a snag photo, answer a dashboard question, write a weekly progress note).
- **AI Log** shows every call with its duration and tokens.
- Every AI output is a suggestion that a user reviews. The AI never approves or posts anything by itself.

Construction

Dashboard

Land

Projects

Design

Estimation

Site

Quality and HSE

Subcontractors

Sales

Billing

Reports

Configuration

6

16

My Company (San Francisco)

New

AI Prompts

Search...

1-10 / 10

<

>

☐	Name	Task Type	Provider
☐	Drawing title block	Drawing Title-Block Extraction	
☐	Land document reader	Land Document Reader	
☐	Contract key terms	Contract Key-Terms Summary	
☐	Daily report summary	Daily Report Summary	
☐	Risk explanation	Cost and Delay Risk Explanation	

Figure 15. The AI prompts delivered with the module.

4 Land and Joint Venture

Start here when the company develops land that belongs to someone else, or buys land. If you only build for clients, you can skip to chapter 5.

4.1 Land Parcels

MENU Construction > Land > Land Parcels

Who: Land / Legal Officer, Director

Create a land parcel

- 1 Click **New**.
- 2 Type the **Name** of the land (for example "Lake View Plot"). The reference (LAND/2026/0001) is given by the system when you save.
- 3 Under **Identification**, fill **Plot / Parcel No.**, **Survey No.**, **Area**, **Land Type**, **Zoning** and **Road Width**.
- 4 Under **Location**, fill the address. **Latitude** and **Longitude** are optional.
- 5 Under **Management**, choose the **Land Officer** in charge and, if the land was bought, the **Purchase Cost**.
- 6 In the tab **Owners**, click **Add a line** for each owner: choose the **Owner** (a contact), the **Role** and the **Share (%)**.

The screenshot shows the 'New Land Parcel' form. The top navigation bar includes 'Construction', 'Dashboard', 'Land', 'Projects', 'Design', 'Estimation', 'Site', 'Quality and HSE', 'Subcontractors', 'Sales', 'Billing', 'Reports', 'Configuration', and 'My Company (San Francisco)'. The 'Land' section is active, showing 'Land Parcels' and 'New'. The form has a 'Send for Verification' button and a 'Draft' tab. The 'IDENTIFICATION' section includes fields for 'Plot / Parcel No.', 'Survey No.', 'Area' (0.00), 'Land Type' (Residential), 'Zoning', and 'Road Width' (0.00). The 'LOCATION' section includes fields for 'Street', 'Street2', 'City', 'State / Province', 'Zip', 'Country', 'Latitude' (0.0000000), and 'Longitude' (0.0000000). On the right side, there is a 'Send message' button and a 'Log note' button. Below these, there is a section for 'Activity' showing a log entry for 'Mitchell Admin' with the note 'Creating a new record...'.

Figure 16. An empty land parcel form.

RULE The ownership shares of a land must total 100 %.

Documents and due diligence

- 1 Open the tab **Documents** and add each paper: **Document Type**, **Number**, **Issue Date**, **Expiry Date**.
- 2 Open the tab **Due Diligence** and click **Load Standard Checklist**. Five standard checks appear.

- For each check, choose the **Responsible** person and, once checked, the **Result** and the date.

Owners	Documents	Due Diligence	Projects	Notes
Item	Responsible	Result	Checked D...	Remarks
Ownership chain verified		OK	Mar 21	
No encumbrance / mortgage		OK	Mar 21	
No pending dispute or litigation		OK	Mar 21	
Land tax cleared		OK	Mar 21	
Lawyer opinion received		OK	Mar 21	
Add a line				

Figure 17. The due-diligence checklist of a land parcel.

Move the land through its steps



- Click **Send for Verification** when the data is complete.
- The land officer clicks **Verify** once the checklist is clean, or **Reject**.
- For land the company buys, click **Mark Acquired**.

RULE Verify is refused while the due-diligence checklist still has open items or issues. The status changes to **Under JV** by itself when a JV contract on this land is signed.

4.2 Land Documents

MENU Construction > Land > Land Documents

This is the vault of all land papers, across all parcels. Open a document to attach the scanned file with the **Files** button, then click **Verify** or **Reject**.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)

New Land Documents Title Deed - D-88721 1/1 < >

Reject Pending Verified Rejected

Land	Lake View Plot	Issue Date	Apr 20, 2024
Document Type	Title Deed	Expiry Date	
Number	D-88721	Verified By	
Issuing Authority	Land Registry		

Figure 18. A land document.

- A document of a type marked **Requires Expiry** cannot be saved without an expiry date, and the expiry date cannot be before the issue date.

- Before a document expires, the land officer receives an activity (visible in the chatter and in the clock icon of the top bar).
- **Read with AI** reads an attached PDF or image and proposes the number and dates. It needs an AI provider.

4.3 Land Owners

MENU Construction > Land > Land Owners

A simple list of every owner with the land, role and share. Use it to find all the lands of one person.



Owner	Land	Role	Share (%)	ID Document Reference
☐ Rahim Chowdhury	Lake View Plot	Owner	60.00	
☐ Karim Chowdhury	Lake View Plot	Co-owner	40.00	

Figure 19. Land owners.

4.4 JV Contracts

MENU Construction > Land > JV Contracts

Who: Land / Legal Officer, Director

Create the contract

- 1 Click **New**.
- 2 Choose the **Land**. The **Owners** are filled from the land.
- 3 Under **Sharing**, type **Developer Share (%)** and **Owner Share (%)**, the **Signing Date** and the **Handover Deadline**.
- 4 Under **Payments to Owners**, type the **Signing Money**, the **Monthly Allowance** with its **Allowance Start** date, and the **Penalty Per Month** for late handover.
- 5 In the tab **Terms and Files**, attach the scanned contract with **Contract Files** and type the main terms.

Figure 20. A new JV contract.

Approve, sign and activate



- 1 Click **Send to Legal Review**.
- 2 The land officer clicks **Approve**.
- 3 After the signature on paper, click **Mark Signed**, then **Activate**.
- 4 Click **Create Project** to open a new construction project already linked to this land and contract.
- 5 When everything is delivered, click **Complete**. A Director can **Terminate** a contract.

RULE The land must be verified before the contract can be signed. A project can only be created from a signed contract, and only once.

Allocate units to the owners

Once the project has units (chapter 5), open the tab **Unit Allocation** and add a line per owner: **Owner**, **Unit** and, if any, **Parking**. The unit changes to **Owner Allocated** and can no longer be sold.

JV/2026/0001

PARTIES

Land: Lake View Plot

Owners: Karim Chowdhury, Rahim Chowdhury

Project: Lake View Residences

Company: My Company (San Francisco)

SHARING

Developer Share (%): 60.00

Owner Share (%): 40.00

Signing Date: Apr 10

Handover Deadline: Sep 2, 2027

PAYMENTS TO OWNERS

Signing Money: \$ 200,000.00

Monthly Allowance: \$ 3,000.00

Allowance Start: May 10

Penalty Per Month: \$ 5,000.00

Unit Allocation

Owner	Unit	Parking	Remarks
Rahim Chowdhury	Tower A / A-3A	Tower A / A-P01	
Karim Chowdhury	Tower A / A-3B		

Add a line

Activity

Today

OdooBot 1:41 AM
Joint-Venture / Development Agreement created

Figure 21. An active JV contract with the owners' units.

RULE Only an owner of the contract's land can receive a unit. A unit that is already booked or sold cannot be allocated.

4.5 Owner Payments

MENU Construction > Land > Owner Payments

Who: Land / Legal Officer, Accountant

The signing money and the monthly allowances appear as payment lines, on the contract (tab **Owner Payments**) and in this menu. The list opens with the filter **Unpaid**.

- 1 Find the line to pay. Lines in red are past their due date.
- 2 Click **Create Bill** at the end of the line. A draft vendor bill is created for the owner.
- 3 Open the bill by clicking **Bill** and validate and pay it in the usual Odoo accounting way.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)									
Owner Payments Unpaid Search... 1-14 / 14									
☐ Contract	Owner	Type	Due Date	Amount	Vendor Bill	State			
☐ JV/2026/0001	Rahim Chowdhury	Signing Money	Apr 10	\$ 120,000.00		To Confirm			
☐ JV/2026/0001	Karim Chowdhury	Signing Money	Apr 10	\$ 80,000.00		To Confirm			
☐ JV/2026/0001	Rahim Chowdhury	Monthly Allowance	May 10	\$ 1,800.00	Draft Bill (JV/2026/0001 - Monthly Allowance 2026-05-10)	Billed			
☐ JV/2026/0001	Karim Chowdhury	Monthly Allowance	May 10	\$ 1,200.00	Draft Bill (JV/2026/0001 - Monthly Allowance 2026-05-10)	Billed			
☐ JV/2026/0001	Rahim Chowdhury	Monthly Allowance	Jun 10	\$ 1,800.00	Draft Bill (JV/2026/0001 - Monthly Allowance 2026-06-10)	Billed			
☐ JV/2026/0001	Karim Chowdhury	Monthly Allowance	Jun 10	\$ 1,200.00	Draft Bill (JV/2026/0001 - Monthly Allowance 2026-06-10)	Billed			
☐ JV/2026/0001	Rahim Chowdhury	Monthly Allowance	Jul 10	\$ 1,800.00	Draft Bill (JV/2026/0001 - Monthly Allowance 2026-07-10)	Billed			

Figure 22. Owner payments: signing money and monthly allowances.

NOTE

For active contracts the monthly allowance lines and their bills are created automatically by a scheduled action. Owner payments can only be billed on a signed contract.

5 Projects, Sites, Buildings and Units

The project is the centre of the app: almost every other record asks for a project first.

5.1 Create a construction project

MENU Construction > Projects > Projects

Who: Project Manager, Director

- 1 Click **New** and type the project name in the large title.
- 2 Choose the **Project Manager**.
- 3 Click the tab **Construction**. **Construction Project** is already ticked.
- 4 Type a short **Project Code** (for example LVR). It becomes part of drawing and document numbers.
- 5 Choose the **Construction Type** and, if any, the **Land**, **JV Contract** and **Consultant**.
- 6 Under **Planning**, set **Planned Start** and **Planned End**.
- 7 Under **Contract**, type the **Contract Value**, **Retention (%)**, **Advance Received** and **Advance Recovery (%)**.
- 8 Under **Team**, choose the **Site Engineers** and the **Construction Team**. These people will see the project.

The screenshot shows the 'New' project form in the app. The 'Construction' tab is selected. The form includes the following fields and sections:

- Project Name:** e.g. Office Party
- Project Manager:** Mitchell Admin
- Planned Date:** →
- CONSTRUCTION** (selected tab):
 - Construction Project: ☒
 - Project Code: ?
 - Construction Type: Own Development (JV)
 - Land:
 - JV Contract:
 - Consultant:
- PLANNING**:
 - Planned Start:
 - Planned End:
 - Planned Progress (%): 0 %
 - Progress (%): 0 %
- CONTRACT**:
 - Contract Value: 0.00
- TEAM**:
 - Site Engineers:

Figure 23. A new project, tab Construction.

RULE A construction project needs a company.

5.2 Sites

A site is the physical place of work. Add it in the **Sites** table of the project (Name, Code, Address, Site In-Charge), or from **Construction > Projects > Sites**.

Click **Create Warehouse** on the site line (or **Create Site Warehouse** on the site form) to give the site its own stock location. It is needed to move material from the central store to the site.

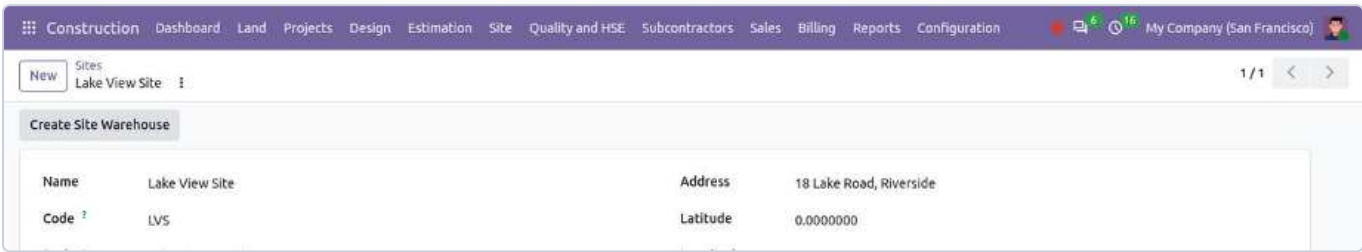


Figure 24. A site.

5.3 Generate buildings, floors and units

You do not type floors and flats one by one. A wizard creates them for you.

- 1 On the project, tab **Construction**, click **Generate Floors and Units**.
- 2 Leave **Building** empty to create a new building and type its **Building Name** and **Building Code**. Choose an existing building to add to it.
- 3 Type the number of **Basements** and of **Floors Above Ground**, and the **Floor Height**. With basements, also give the **Parking Spaces per Basement**.
- 4 Under **Typical Units**, type **Units Per Floor**, the **Unit Type**, **Unit Area**, **Bedrooms**, **Bathrooms** and **Base Price**.
- 5 Click **Generate**.

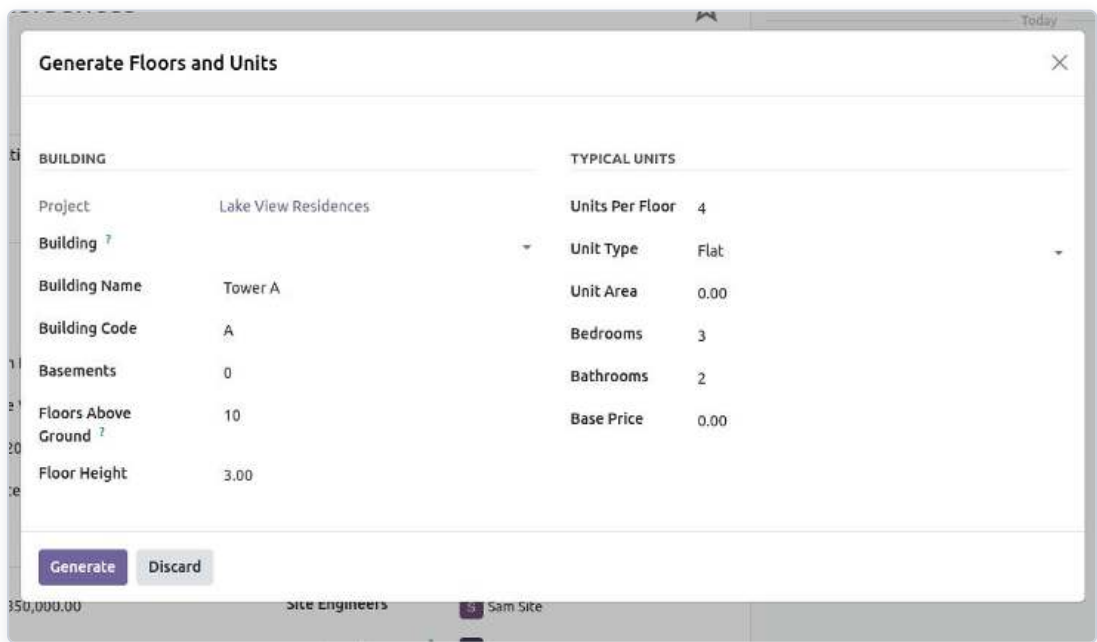


Figure 25. The Generate Floors and Units wizard.

Figure 26. A complete project: planning, contract, team, sites, buildings and risk indicators.

5.4 Buildings and Floors

MENU Construction > Projects > Buildings

The building form shows its floors, units and 3D models. **Create Analytic Account** gives the building its own cost account. **Construction > Projects > Floors** lists all floors with level, type, area and height.

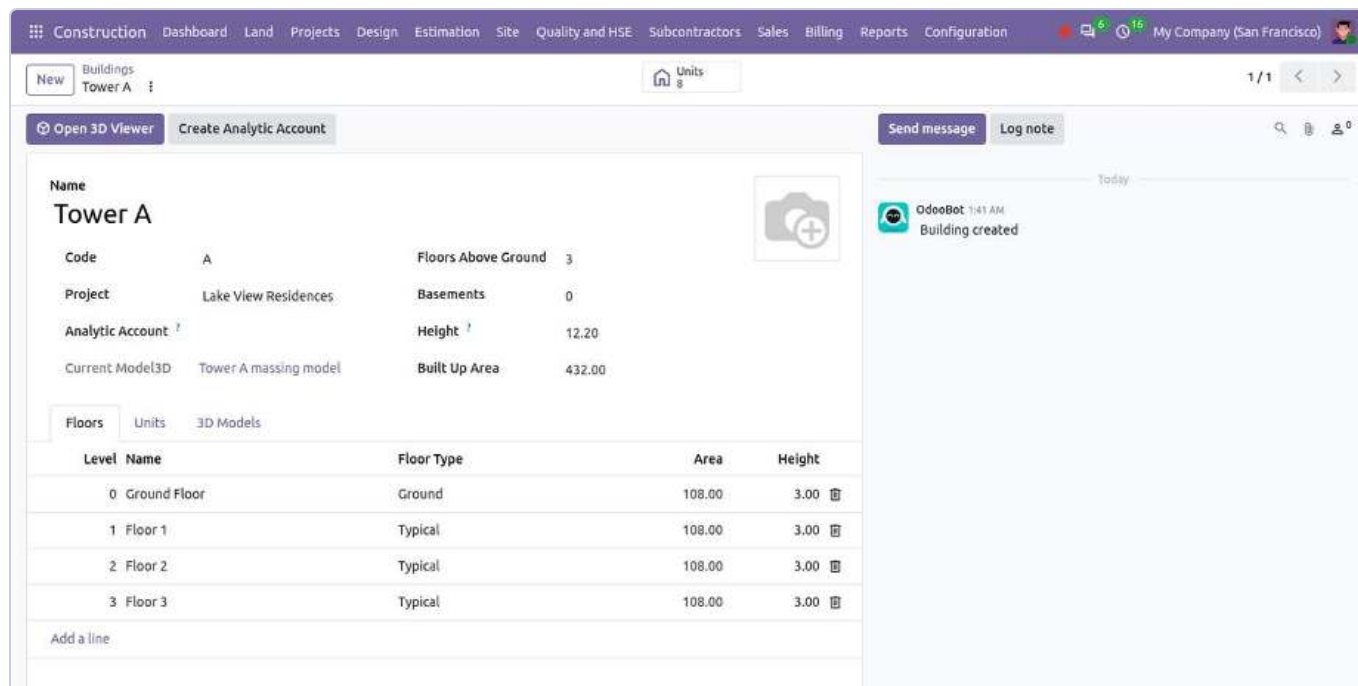


Figure 27. A building with its floors.

5.5 Units

MENU Construction > Projects > Units

A unit is anything you sell or allocate: a flat, a shop, a parking space. Open a unit to correct its **Area**, **Bedrooms**, **Facing** or **Base Price**, and to list its rooms in the tab **Rooms**.

Project	Building	Floor	Code	Unit Type	Area	Bedrooms	Base Price	Customer	State
☐ Lake View Residences	Tower A	Tower A / Ground Floor	A-P01	Parking	12.50	0	\$ 8,000.00		Owner Allocated
☐ Lake View Residences	Tower A	Tower A / Ground Floor	A-P02	Parking	12.50	0	\$ 8,000.00	Nadia Islam	Sold
☐ Lake View Residences	Tower A	Tower A / Floor 1	A-1A	Flat	52.00	2	\$ 100,000.00	Nadia Islam	Sold
☐ Lake View Residences	Tower A	Tower A / Floor 1	A-1B	Flat	52.00	2	\$ 100,000.00		Available
☐ Lake View Residences	Tower A	Tower A / Floor 2	A-2A	Flat	52.00	2	\$ 105,000.00		Available

Figure 28. The list of units with their status.

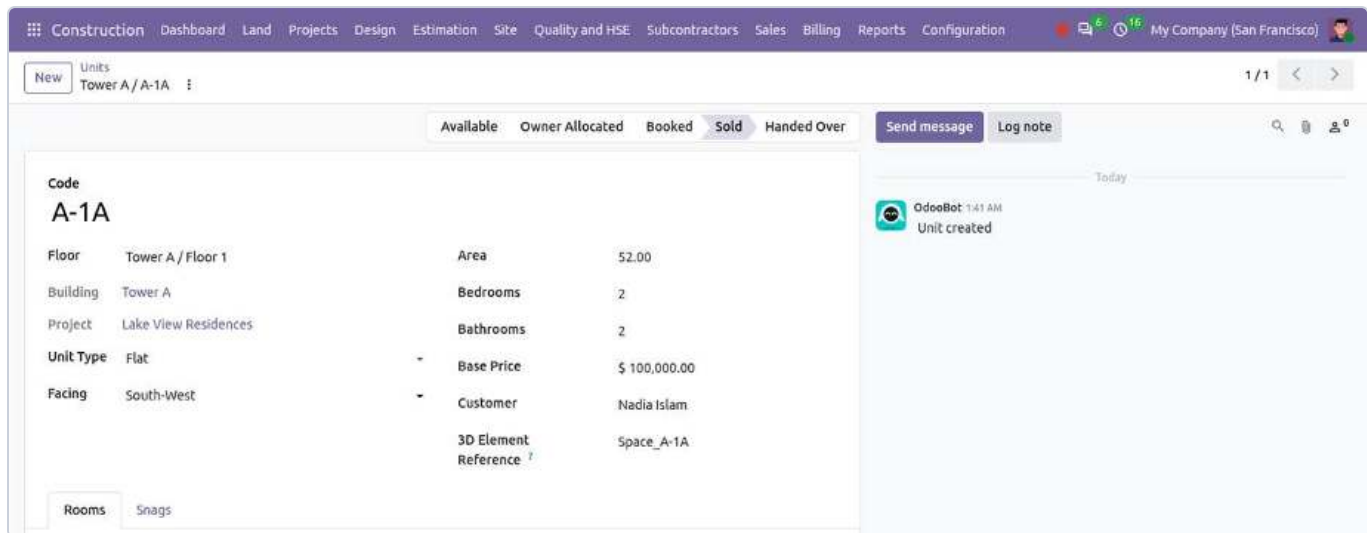


Figure 29. A unit with its rooms.

Status	Meaning
Available	Free to sell.
Owner Allocated	Given to a land owner by a JV contract.
Booked	A booking is confirmed.
Sold	The sale agreement is signed.
Handed Over	The keys were given.

RULE The unit status follows allocations, bookings and handovers. Only a Director can change it by hand.

5.6 Tasks and Planning

MENU Construction > Projects > Tasks and Planning

Each construction phase of the project is a task with a **Deadline**, a **Planned Quantity** and a **Done Quantity**. The done quantity and **Site Progress (%)** rise by themselves from the daily site reports.

The screenshot shows the Odoo Construction module interface with the 'Tasks and Planning' view selected. The table lists tasks for 'Lake View Residences' with columns: Project, Title, Construction Phase, Building, Assignees, Deadline, Planned Quantity, Done Quantity, Site Progress (%), and State. The tasks are: Site preparation and excavation (Site Preparation, Tower A, Sam Site, Jun 9, 11:00 PM, 380.00, 380.00, 100 %, Done), Foundation complete (Foundation, Tower A, Sam Site, Jul 29, 11:00 PM, 95.00, 95.00, 100 %, Done), Brickwork (Superstructure, Tower A, Sam Site, Oct 2, 11:00 PM, 210.00, 95.00, 45 %, In Progress), Superstructure complete (Superstructure, Tower A, Sam Site, Nov 16, 11:00 PM, 222.00, 140.00, 63 %, In Progress), and MEP first fix (MEP, Tower A, Sam Site, Feb 4, 2027, 11:00 PM, 2.00, 0.00, 0 %, In Progress).

Project	Title	Construction Phase	Building	Assignees	Deadline	Planned Qu...	Done Quant...	Site Progress (%)	State
Lake View Residences	Site preparation and excavation	Site Preparation	Tower A	Sam Site	Jun 9, 11:00 PM	380.00	380.00	100 %	Done
Lake View Residences	Foundation complete	Foundation	Tower A	Sam Site	Jul 29, 11:00 PM	95.00	95.00	100 %	Done
Lake View Residences	Brickwork	Superstructure	Tower A	Sam Site	Oct 2, 11:00 PM	210.00	95.00	45 %	In Progress
Lake View Residences	Superstructure complete	Superstructure	Tower A	Sam Site	Nov 16, 11:00 PM	222.00	140.00	63 %	In Progress
Lake View Residences	MEP first fix	MEP	Tower A	Sam Site	Feb 4, 2027, 11:00 PM	2.00	0.00	0 %	In Progress

Figure 30. Phase tasks with their progress.

5.7 Risk indicators and project reports

- At the bottom of the project form, **Risk Indicators** show a **Cost Overrun Risk** and a **Delay Risk** with the reasons in plain words. A scheduled action recomputes them; **Recompute Risks** does it now.
- **Draft Weekly Progress Note (AI)** writes a progress note from the approved site reports of the last 7 days (AI provider needed).
- The gear icon › **Print** gives the **Project Status Report** and the **Final Account**.

6 Design and Drawings

This chapter covers document control: the brief, the drawing register, revisions and their approval, sending drawings out, and questions from site.

6.1 Design Briefs

MENU Construction > Design > Design Briefs

Who: Architect / Designer, Project Manager

- 1 Click **New**, type a title and choose the **Project**. Land and plot data are filled from the project.
- 2 Fill **Floors**, **Architectural Style**, the **Budget Range** and the tab **Requirements**.
- 3 In the tab **Unit Mix**, add the kinds of unit wanted with their quantity and area. Use **Area Schedule** for the other spaces.
- 4 Click **Submit**. The project manager clicks **Approve** or **Reject**.

Draft → Submitted → Approved

The screenshot displays the Odoo Design Briefs interface. At the top, a navigation bar includes links for Construction, Dashboard, Land, Projects, Design, Estimation, Site, Quality and HSE, Subcontractors, Sales, Billing, Reports, Configuration, and a user profile for 'My Company (San Francisco)'. Below the navigation bar, a 'New' button is visible next to the title 'Design Briefs Lake View design brief'. The main content area is divided into two columns. The left column contains fields for 'PROJECT' (Project: Lake View Residences, Land: Lake View Plot, Floors: 4, Architectural Style: Contemporary) and 'BUDGET RANGE' (Budget Min: \$ 1,500,000.00, Budget Max: \$ 1,900,000.00). The right column contains 'PLOT DATA' (Plot Area: 900.00, Road Width: 12.00, Zoning: Residential R2) and 'SIGN-OFF' (Approved By: Paul Manager, Approved Date: Apr 20). Below these fields are three tabs: 'Requirements', 'Unit Mix', and 'Area Schedule'. The 'Requirements' tab is active, showing the text 'Two flats per floor, cross ventilation, covered parking at ground floor.' On the right side of the interface, there is a 'Send message' button, a 'Log note' button, and an 'Activity' section. The activity section shows a message from 'OdooBot' at 1:41 AM stating 'Design Brief created'.

Figure 31. An approved design brief.

RULE With the setting **Design Brief Before Drawings** on, the design stage of a project opens once its design brief is approved.

6.2 Drawing Register

Register a drawing

- 1 Click **New** and type the **Drawing title**.
- 2 Choose the **Project**, the **Discipline** and the **Drawing Type**. Optionally the **Building** and **Floor**.
- 3 Fill **Scale**, **Sheet Size**, **Designer**, **Checker** and the **Planned Submit Date**.
- 4 Save. The system gives the number, for example LVR-ARC-PL-0001 (project code, discipline, type, running number).

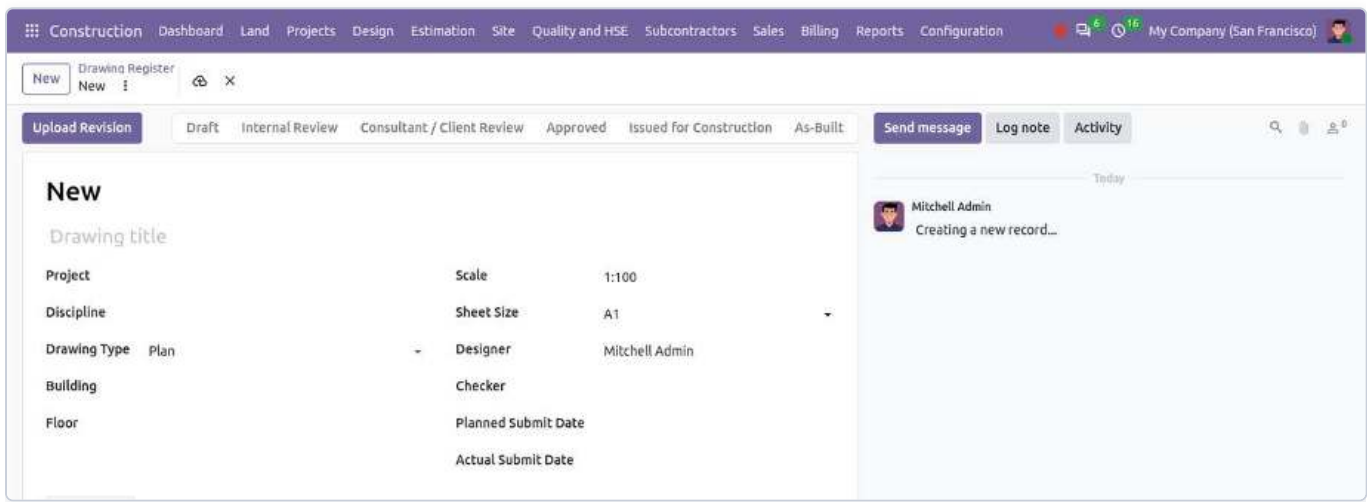
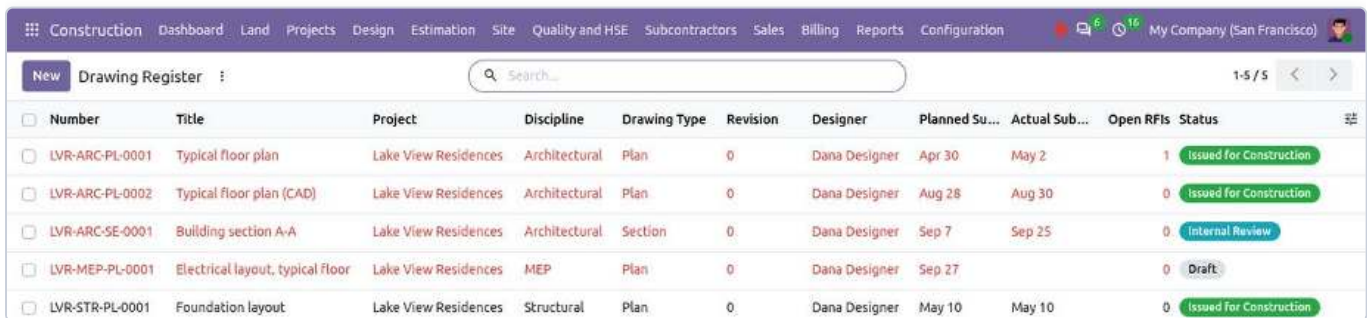


Figure 32. A new drawing.



Number	Title	Project	Discipline	Drawing Type	Revision	Designer	Planned Su...	Actual Sub...	Open RFIs	Status
LVR-ARC-PL-0001	Typical floor plan	Lake View Residences	Architectural	Plan	0	Dana Designer	Apr 30	May 2	1	Issued for Construction
LVR-ARC-PL-0002	Typical floor plan (CAD)	Lake View Residences	Architectural	Plan	0	Dana Designer	Aug 28	Aug 30	0	Issued for Construction
LVR-ARC-SE-0001	Building section A-A	Lake View Residences	Architectural	Section	0	Dana Designer	Sep 7	Sep 25	0	Internal Review
LVR-MEP-PL-0001	Electrical layout, typical floor	Lake View Residences	MEP	Plan	0	Dana Designer	Sep 27		0	Draft
LVR-STR-PL-0001	Foundation layout	Lake View Residences	Structural	Plan	0	Dana Designer	May 10	May 10	0	Issued for Construction

Figure 33. The drawing register. Late drawings are shown in red.

Upload a revision

- 1 Open the drawing and click **Upload Revision**.
- 2 Choose the **File** (PDF, image, DWG or DXF), check the **Date** and type the **Change Description**.
- 3 Tick **Send for Review** to start the review at once.
- 4 Click **Upload**. The revision code (0, then A, B ... or 1, 2 ...) is given by the system.

Upload Revision

Drawing: LVR-ARC-PL-0001 Typical floor plan

File: Upload your file

Date: Oct 8

Change Description:

Send for Review: ☐

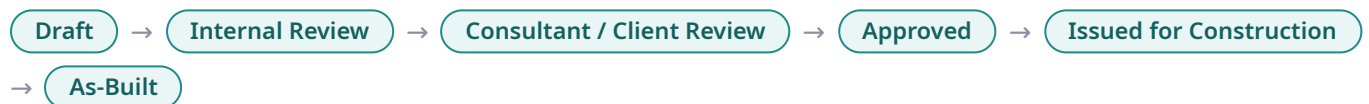
Upload Discard

Figure 34. The Upload Revision wizard.

RULE A new revision is refused while the drawing already has a revision under review or approved. A file is needed before a revision can be sent for review.

6.3 Revisions and their approval

MENU Construction > Design > Revisions



Button	Who	Result
Send for Review	Designer, Project Manager	Draft becomes Internal Review.
Internal Review OK	Designer, Project Manager	Passes the drawing to the consultant or client review.
Approve	Project Manager	The revision is approved.
Issue for Construction	Project Manager	The revision becomes the one the site must build from.
Mark As-Built	Project Manager	Records the drawing as built.
Reject	Designer, Project Manager	Asks for a comment, then sends the revision back.

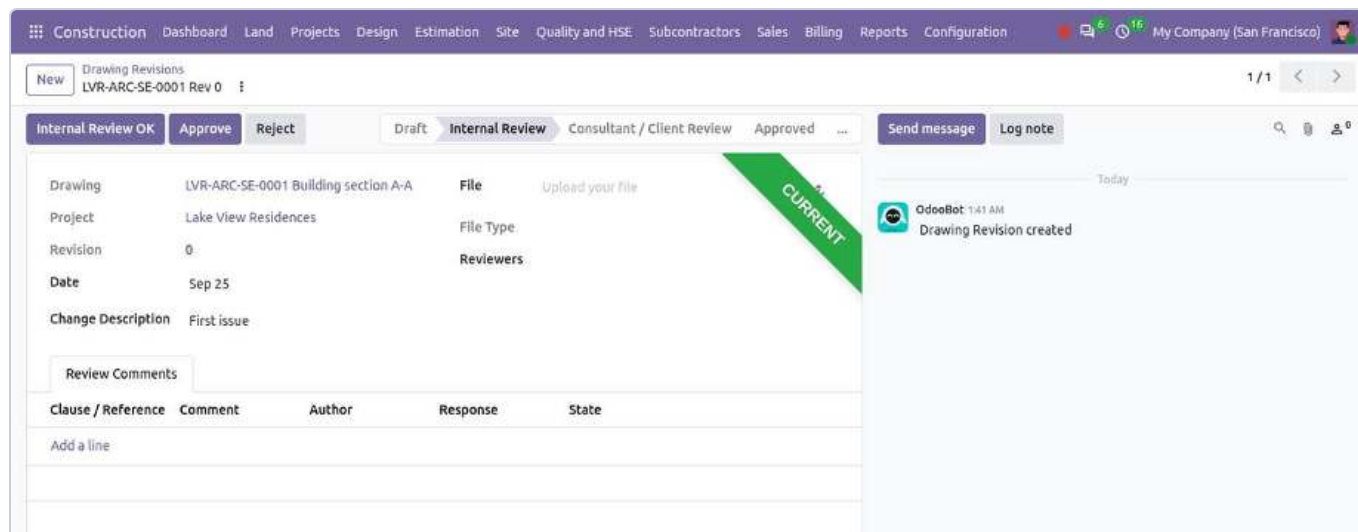


Figure 35. A revision under internal review. The green ribbon marks the current revision.

- Reviewers write their remarks in the tab **Review Comments**; the designer answers in the **Response** column.
- The tab **Preview** shows PDF and image files.
- **Read Title Block (AI)** reads the title block of a PDF or image and proposes the drawing data.

RULE A comment is required to reject a revision.

6.4 CAD files (DWG / DXF)

MENU Construction > Design > CAD Files (DWG/DXF)

DXF files are read directly. DWG files are converted in the background when a converter program is set in the settings; without one they are stored without preview. When the tab **CAD** shows **Conversion State: Done**, click **Open CAD Viewer**.



Figure 36. The CAD viewer.

- **Pan**: drag to move, scroll to zoom. **Fit** shows the whole drawing.
- **Measure**: click two points to read a distance.
- **Markup**: draw remarks on the drawing, then **Save** them with the revision.
- **Compare with**: choose another revision to see what changed.
- **Layers** (right): tick or untick a layer; **All** and **None** switch every layer.

6.5 Transmittals

MENU Construction > Design > Transmittals

- 1 Click **New** and choose the **Project**, the **Recipients** and the **Purpose** (For Information, For Approval, For Construction).
- 2 In the tab **Drawings**, add the revisions to send, with the number of **Copies**.
- 3 Click **Issue**. The recipients receive an email with a link to download the drawings and acknowledge receipt on the portal.

Draft → Issued → Acknowledged

TRN/LVR/0001

Project: Lake View Residences
Issue Date: Oct 7
Recipients: Solid Rock Builders, Vertex Consultants
Purpose: For Construction
Acknowledged By: [blank]
Acknowledged Date: [blank]

Revision	Title	State	Copies	Remarks
LVR-ARC-PL-0001 Rev 0	Typical floor plan	Issued for Construction	1	

Activity Log:

- OdooBot 1:41 AM: Transmittal TRN/LVR/0001 has been issued for construction.
 - LVR-ARC-PL-0001 Rev 0: Typical floor plan
 - LVR-STR-PL-0001 Rev 0: Foundation layout
 Please open the transmittal to download the drawings and acknowledge receipt.
- OdooBot 1:41 AM: Drawing Transmittal created

Figure 37. An issued transmittal.

RULE A transmittal needs at least one revision, only lists drawings of its own project, and only accepts revisions that are Approved or Issued for Construction.

6.6 RFIs (Requests For Information)

MENU Construction > Design > RFIs

- 1 Click **New**. Type the subject, choose the **Project** and, if known, the **Drawing** and **Revision**.
- 2 Choose who must answer in **Assigned To** (or an **External Responder**), set the **Priority** and the **Due Date**.
- 3 Type the **Question** and attach photos or sketches with **Files**.
- 4 The designer types the **Answer** and clicks **Mark Answered**. Once the answer is accepted, click **Close**.

Open → Answered → Closed

RFI/LVR/0001
Beam depth at grid B

Project: Lake View Residences
Raised By: Sam Site
Drawing: LVR-ARC-PL-0001 Typical floor plan
Assigned To: Dana Designer
Revision: LVR-ARC-PL-0001 Rev 0
External Responder: Vertex Consultants
Priority: ★★
Due Date: Oct 5
Answered Date: [blank]

QUESTION

The plan shows a 450 mm beam at grid B while the section shows 600 mm. Which depth applies?

FILES

ANSWER

Activity Log:

- Planned Activities: Yesterday: Overdue RFI RFI/LVR/0001 for Paul Manager (Done, Edit)
- OdooBot 1:41 AM: RFI RFI/LVR/0001 was raised by Sam Site: Beam depth at grid B. The plan shows a 450 mm beam at grid B while the section shows 600 mm. Which depth applies? Answer requested by 10/05/2026.
- OdooBot 1:41 AM: Request for Information created

Figure 38. An overdue RFI.

- An RFI past its due date shows a red **OVERDUE** ribbon and creates a reminder activity.
- **Draft Answer (AI)** proposes an answer; **Use This Draft** copies it into the answer for you to edit.

RULE Write the answer before marking the RFI as answered.

6.7 Design Changes

MENU Construction > Design > Design Changes

Record a change asked by the client, the owners or the site. Fill the **Source RFI**, the **Affected Drawings**, the **Cost Impact**, the **Time Impact Days** and the **Reason**, then **Submit**. The project manager clicks **Approve** or **Reject**. On an approved change, **Variation Order** creates the variation to bill (chapter 12).

Figure 39. A design change waiting for a decision.

6.8 Authority Approvals

MENU Construction > Design > Authority Approvals

Follow permits such as the building plan, fire safety or utility connections. Record the **Approval Type**, **Authority**, **Reference**, **Fee** and dates, then use **Mark Applied**, **Mark Approved** or **Mark Rejected**. An approval near its **Expiry Date** appears in the dashboard alerts.

Project	Approval Type	Authority	Reference	Application...	Approved ...	Expiry Date	State
☐ Lake View Residences	Utility Connection	Power Distribution Company					To Apply
☐ Lake View Residences	Fire Safety	Fire Service		Sep 17			Applied
☐ Lake View Residences	Building Plan	City Development Authority	CDA/BP/2291		Apr 25	Nov 1	Approved

Figure 40. Authority approvals of a project.

7 Design Editor, 3D Viewer and Site Layout

Three visual tools: draw a floor plan in the browser, look at a building in 3D, and plan the temporary site facilities.

7.1 Design plans

MENU Construction > Design > Design Editor

Who: Architect / Designer, Project Manager

- 1 Click **New**, type a **Name**, choose the **Building** and the **Floor**. Save.
- 2 The standard layers (walls, openings, rooms, grid, columns, beams, slabs, MEP ...) are created for you in the tab **Layers**.
- 3 Click **Open Editor**.

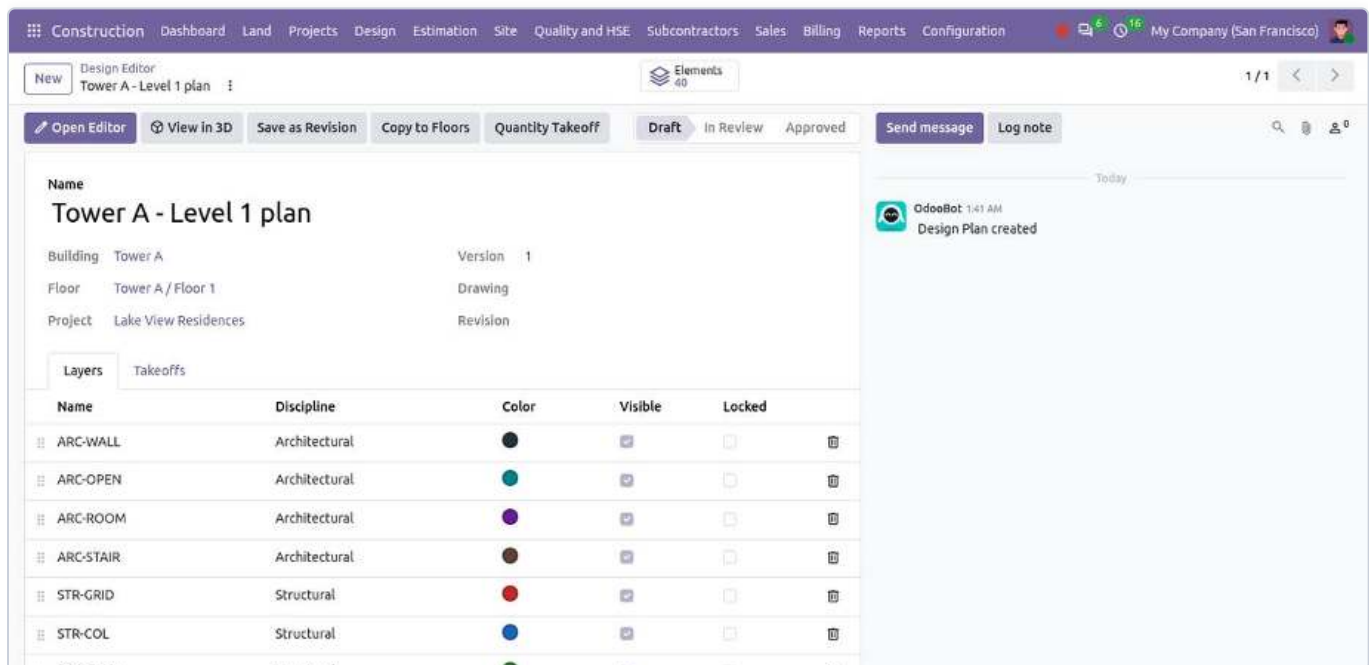


Figure 41. A design plan with its layers.

7.2 Draw in the Design Editor

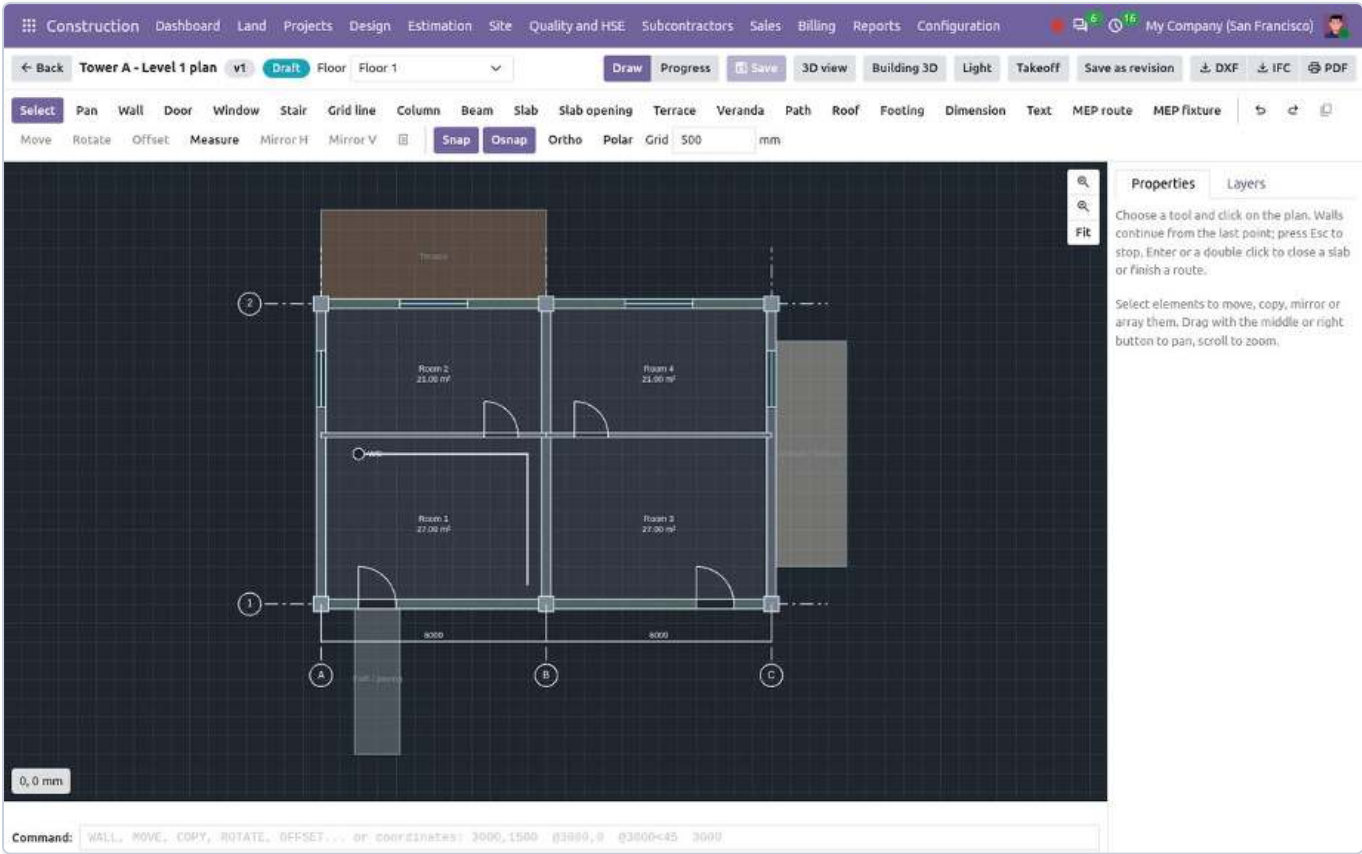


Figure 42. The Design Editor.

Area	What it is for
Top bar	Back , the plan name, version and status, the Floor selector, Draw / Progress mode, Save , 3D view , Building 3D , Light (light or dark drawing area), Takeoff , Save as revision and the downloads DXF , IFC , PDF .
Tool row	Select, Pan, Wall, Door, Window, Stair, Grid line, Column, Beam, Slab, Slab opening, Terrace, Veranda, Path, Roof, Footing, Dimension, Text, MEP route, MEP fixture; then undo, redo and copy.
Edit row	Move, Rotate, Offset, Measure, Mirror H, Mirror V, delete; the drawing aids Snap , Osnap , Ortho , Polar and the Grid size in millimetres.
Drawing area	The plan. The small buttons at its top right zoom in, zoom out and Fit the whole plan.
Right panel	Properties of the selected element (size, material, layer) and the Layers list (visible, locked).
Command line	Type a command (WALL, MOVE, COPY, ROTATE, OFFSET ...) or coordinates, as in a CAD program.

Your first wall

- 1 Click **Wall** in the tool row.
- 2 Click on the plan where the wall starts, then click where it ends. The next wall continues from the last point.
- 3 Press **Esc** to stop drawing.

- 4 For an exact length, type coordinates in the command line instead of clicking: `3000,1500` is a point; `@3000,0` is 3000 mm to the right of the last point; `@3000<45` is 3000 mm at 45 degrees; `3000` is 3000 mm in the direction of the mouse.
 - 5 Click **Door** or **Window**, then click on a wall: the opening is placed in that wall.
 - 6 Click **Slab**, click each corner of the floor, then press **Enter** or double-click to close it.
 - 7 Click **Save**.
- Drag with the middle or right mouse button to pan; scroll to zoom.
 - Click **Select**, then click elements to move, copy, mirror or array them. **Ctrl+Z** undoes, **Ctrl+Y** redoes, **Del** deletes.
 - A plan holds a limited number of elements; the editor tells you when the limit is reached.

See the plan in 3D

Click **3D view** to open a live 3D pane next to the plan. It follows every change. **Bird's eye**, **Top** and **Outside** change the camera; **4K image** downloads a 3840 x 2160 picture. **Building 3D** builds the whole building from the plans of all its floors and opens it in the 3D viewer.

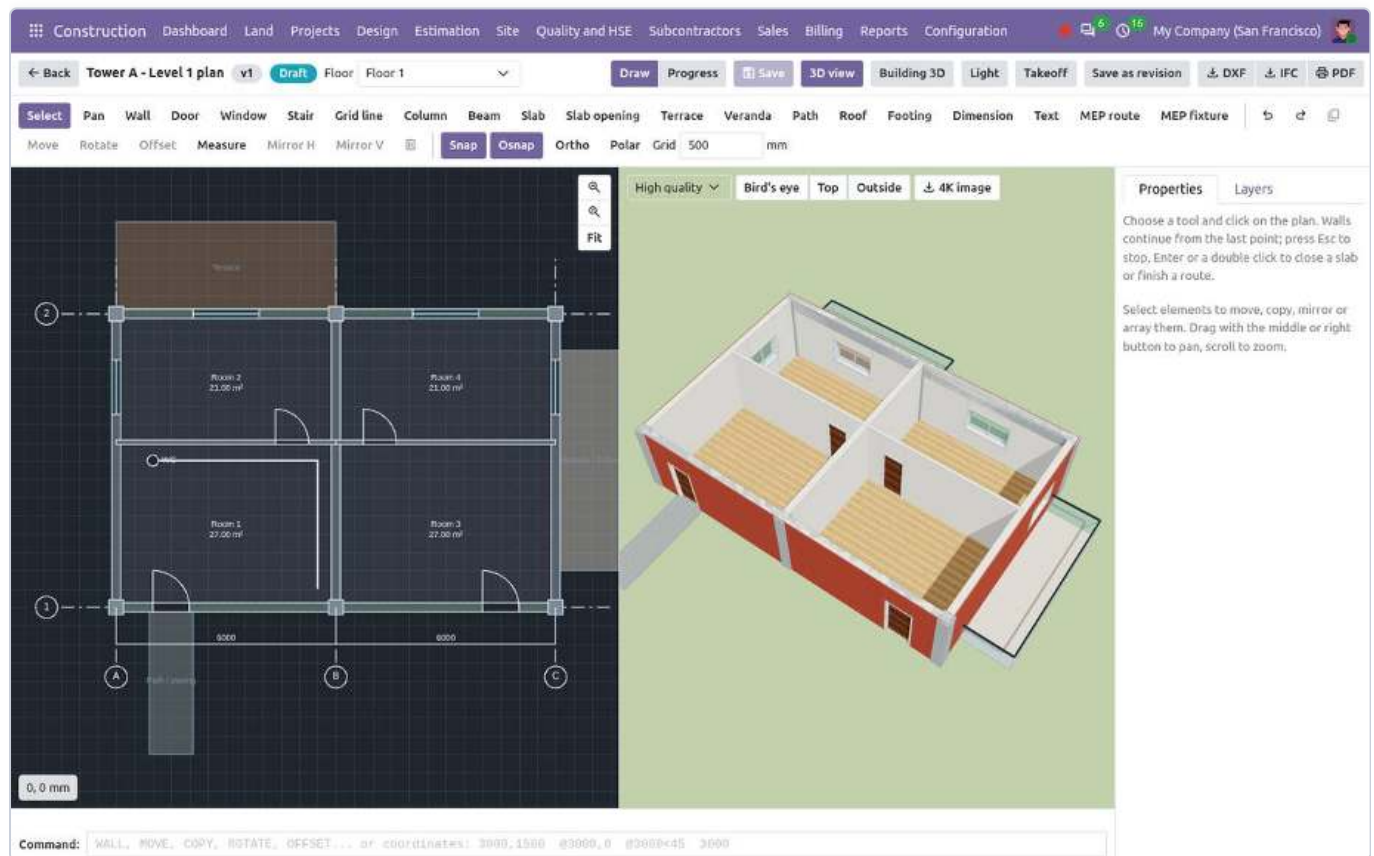


Figure 43. The plan and its live 3D view side by side.

Versions, floors and takeoff

- **Save as Revision** stores the plan as a drawing revision and sends it into the review of chapter 6. A plan under review or approved is locked: use **New Version** to change it.
- **Copy to Floors** copies this typical floor to the other floors you choose. Floors under review or approved are refused.
- **Quantity Takeoff** (or **Takeoff** in the editor) measures the plan.

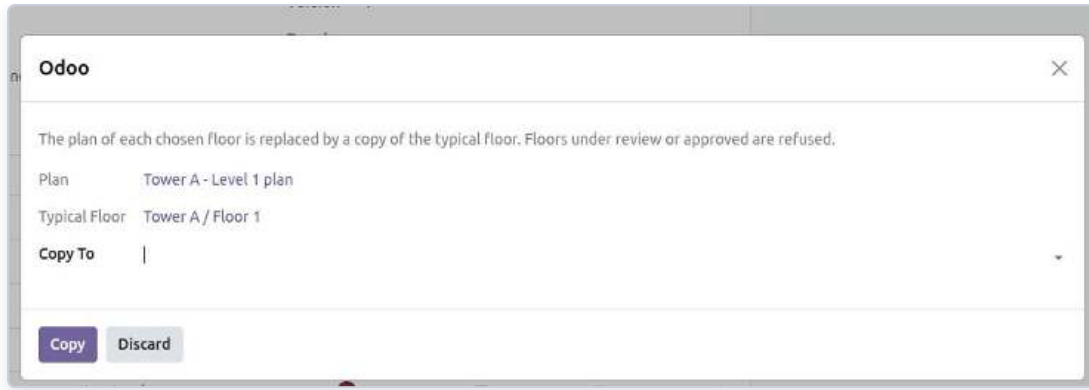


Figure 44. Copy a typical floor to other floors.

7.3 Quantity Takeoffs

MENU Construction > Design > Quantity Takeoffs

Who: Architect / Designer, Project Manager

- 1 Open the takeoff and click **Compute**. The lines show brickwork, concrete, doors, windows, finishes, plaster, reinforcement and MEP, each with its quantity and unit.
- 2 Choose the draft **BOQ** that must receive the quantities.
- 3 The project manager clicks **Push to BOQ**. The status becomes **In BOQ**.

Item	Description	Section Type	Quantity	Unit	Elements
BRICK	Brickwork	Superstruc...	36.72	m³	7
CONC-SUPER	Concrete, superstructure	Superstruc...	24.81	m³	12
DOOR-1000x2100	Door 1000x2100 mm	Finishing	2.00	Units	2
DOOR-900x2100	Door 900x2100 mm	Finishing	2.00	Units	2
FLOOR-FIN	Floor finish	Finishing	96.00	m²	4
MEP-PLUMBING-50	Plumbing route, 50 mm	MEP	8.00	m	1
MEP-PLUMBING-FIX...	Plumbing WC	MEP	1.00	Units	1
PLASTER	Plaster	Finishing	325.20	m²	7
REBAR	Reinforcement (estimate by ratio)	Superstruc...	2,729.10	kg	12

Figure 45. A quantity takeoff computed from the plan.

RULE Compute the takeoff first. Quantities can only be pushed to a draft BOQ, and a takeoff is pushed once.

Construction > Design > Design Materials holds the wall, column, beam and slab materials with their thickness, density, plaster coats, reinforcement ratio and cost rate. The takeoff uses these values.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)									
New Design Materials Search... 1-7/7									
☐	Name	Element Type	Category	Thickness (...)	Density (kg...)	Plaster ...	Rebar (kg/m3)	Cost Rate	Color
☐	Brick wall 125 mm	Wall	Masonry	125.00	1,900.00	2	0.00	0.00	
☐	Brick wall 250 mm	Wall	Masonry	250.00	1,900.00	2	0.00	0.00	
☐	RCC wall 200 mm	Wall	Reinforced Concrete	200.00	2,400.00	2	90.00	0.00	
☐	RCC column	Column	Reinforced Concrete	0.00	2,400.00	2	160.00	0.00	
☐	RCC beam	Beam	Reinforced Concrete	0.00	2,400.00	2	130.00	0.00	

Figure 46. Design materials.

7.4 3D Models and Viewer

MENU Construction > Design > 3D Models and Viewer

Add a model

- 1 Click **New**, type a **Name** and choose the **Building**.
- 2 Upload the **File** exported from your design tool. Accepted formats: IFC, GLB, glTF and OBJ.
- 3 Tick **Is Current** for the model to use, and **Visible on Portal** if customers may see it.
- 4 Click **Open 3D Viewer**. The element list is stored the first time the model is opened.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration 6 16 My Company (San Francisco)									
New 3D Models Tower A massing model Elements 56 1/1									
Open 3D Viewer Send message Log note									
Name Tower A massing model									
Building Tower A		File tower_a.obj							
Project Lake View Residences		File Format OBJ							
Drawing Revision		File Size (MB) 0.01							
Is Current ☒		Unit Scale 1.00							
Visible on Portal ☒		Up Axis Y							
		Elements Loaded ☒							
Upload an IFC, GLB/glTF or OBJ file exported from your design tool. The element list is stored the first time the model is opened in the viewer.									

Figure 47. A 3D model record.

Use the viewer

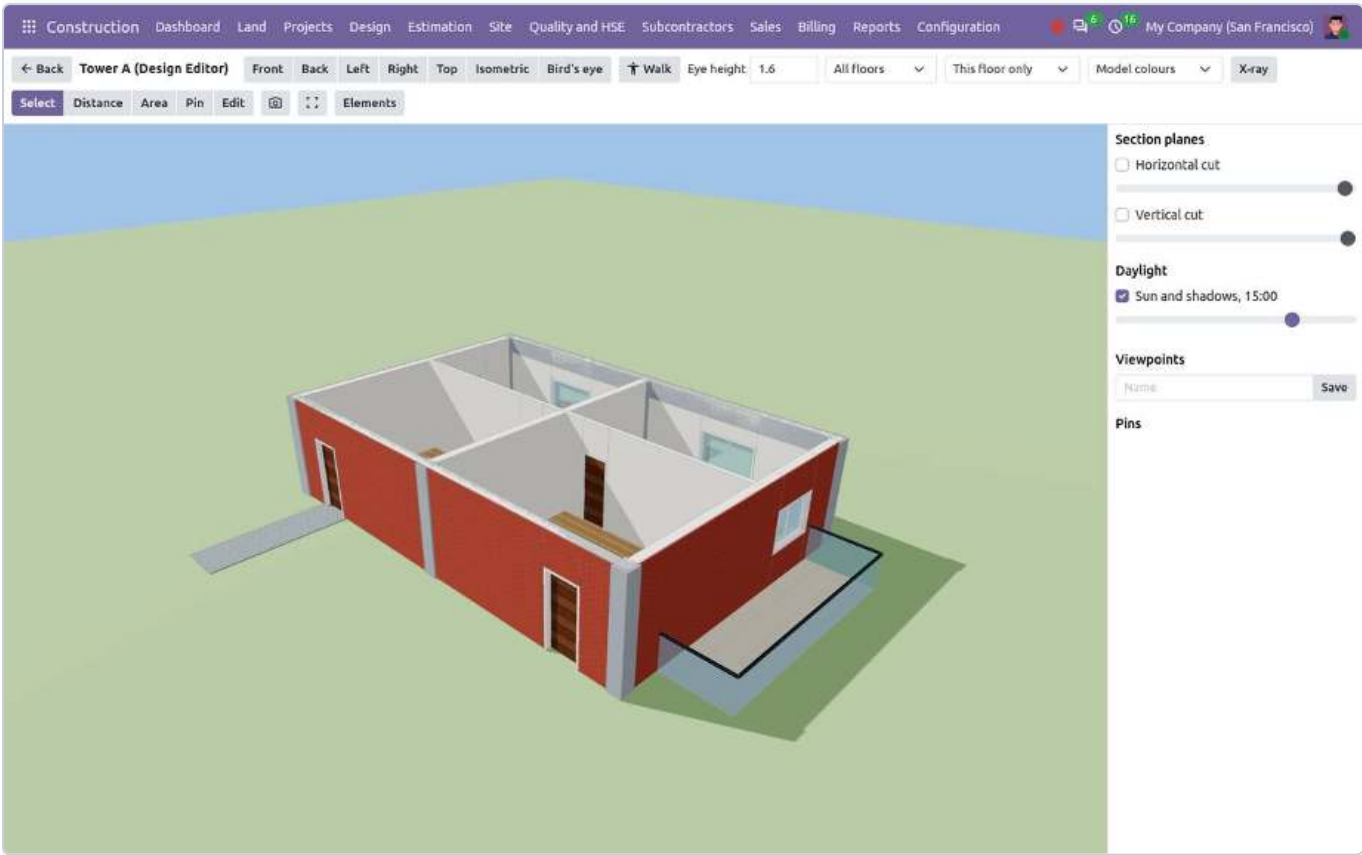


Figure 48. The 3D viewer with a building drawn in the Design Editor.

Control	Use
Front, Back, Left, Right, Top, Isometric, Bird's eye	Ready-made camera positions. Drag to turn, scroll to zoom.
Walk	Walk inside the building: W A S D to move, mouse to look. Eye height sets the height of your eyes.
All floors / This floor only / Hide floors above	Show one floor, or cut the building above a floor.
Model colours / Progress status / Planned vs actual / Unit sales	Colour the model by its own materials, by site progress, by delay, or by sales status of the units.
X-ray	Makes the model see-through.
Select, Distance, Area	Click an element to see its data, hide it or recolour it; or measure a distance or an area.
Pin	Place a pin on the model and link it to a comment, an RFI, a snag or an NCR.
Edit	Record the progress of the selected elements (not started, in progress, done, delayed).
Camera icon, frame icon, Elements	Save a screenshot as an attachment, go full screen, open the element list.

Control	Use
Section planes	Tick Horizontal cut or Vertical cut and move the slider to slice the building.
Daylight	Tick Sun and shadows and move the slider to change the hour.
Viewpoints	Type a name and click Save to keep the current camera position.

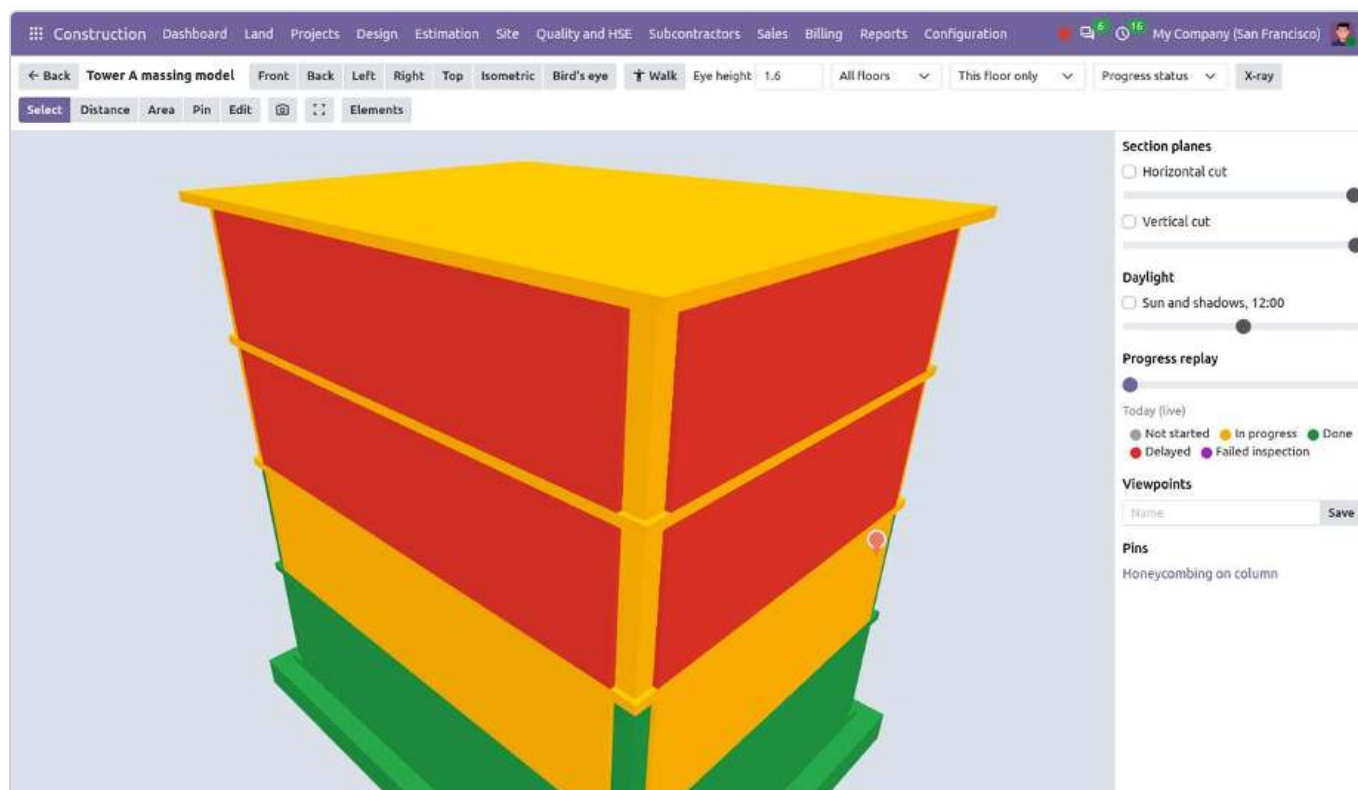


Figure 49. Progress status colours: green is done, amber in progress, red delayed.

With **Progress status**, the panel also shows **Progress replay**: move its slider to see how the building looked on any past day. Progress entered on site is listed in [Construction > Site > 3D Progress Updates](#).

7.5 Site Layout Planner

MENU [Construction > Design > Site Layout Planner](#)

- 1 Click **New**, type a **Name**, choose the **Project** and the **Phase**.
- 2 Click **Boundary from Land Area** to draw a plot from the area of the land, if no boundary exists yet.
- 3 Click **Open Planner**.
- 4 Click an object type in **Site objects** (left) to add it, then drag it to its place on the plot. The selected object can be renamed, rotated, scaled or removed.
- 5 Read the **Clash hints** (right): the planner warns, for example, when a crane radius crosses the boundary or two objects overlap.
- 6 Click **Save**. Back on the form, the project manager clicks **Approve**.

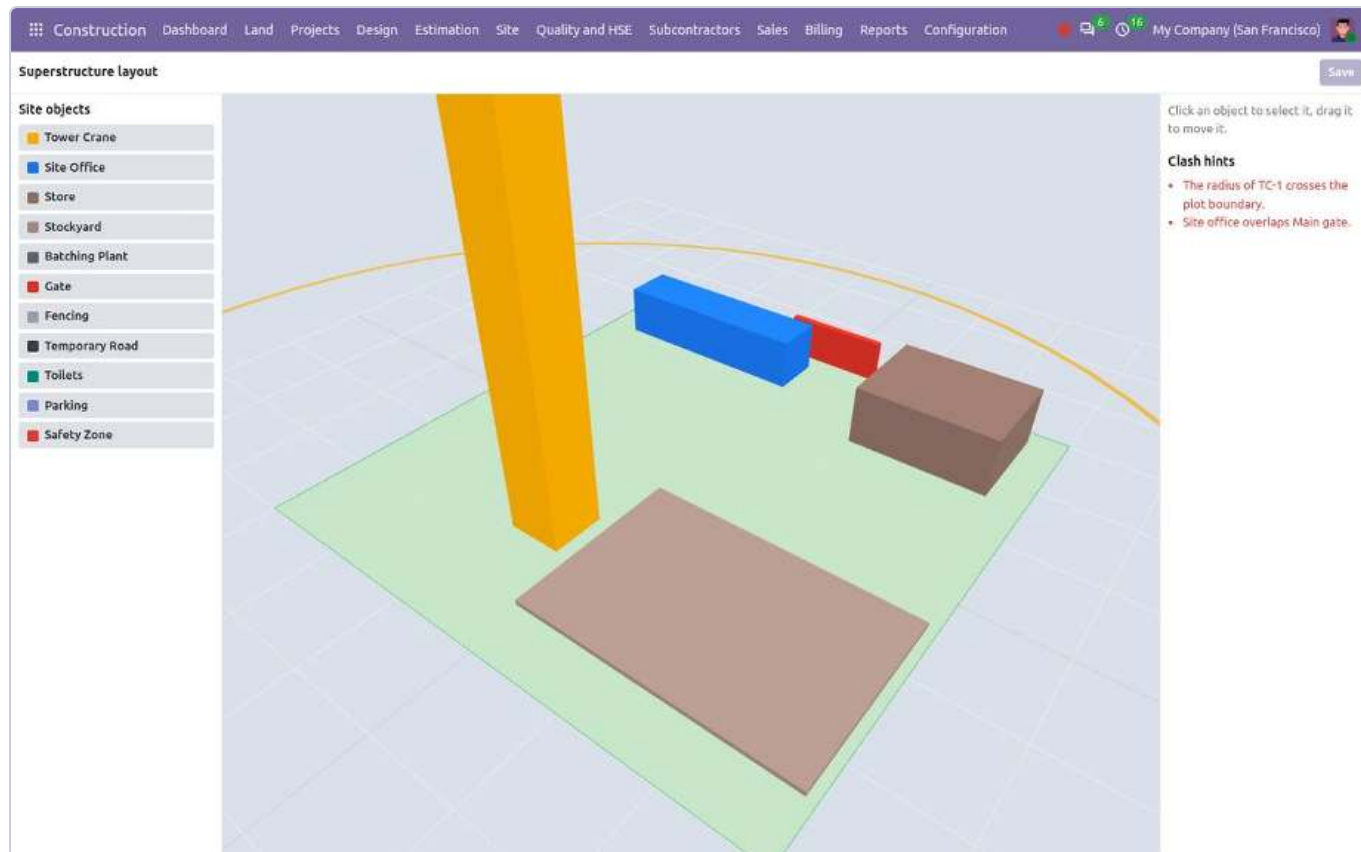


Figure 50. The Site Layout Planner with two clash hints.

8.1 Bill of Quantities (BOQ)

MENU Construction > Estimation > BOQ

Who: Project Manager, Accountant

Create a BOQ by hand

- 1 Click **New**, type the **Name** and choose the **Project**.
- 2 Choose the **Version Type**: Estimate, Tender, Contract or Revised.
- 3 In the tab **Sections**, add the chapters of the BOQ (Substructure, Superstructure, Finishing, MEP ...).
- 4 In the tab **Lines**, click **Add a line** for each item: **Section**, **Item Code**, **Description**, **Unit**, **Quantity**, **Rate** and **Cost Head**. The **Amount** is computed.

Figure 51. A new BOQ.

Or import it from Excel

- 1 On a draft BOQ, click **Import XLSX**.
- 2 Click **Download Template** and fill the template in Excel.
- 3 Choose the filled file and click **Import**.

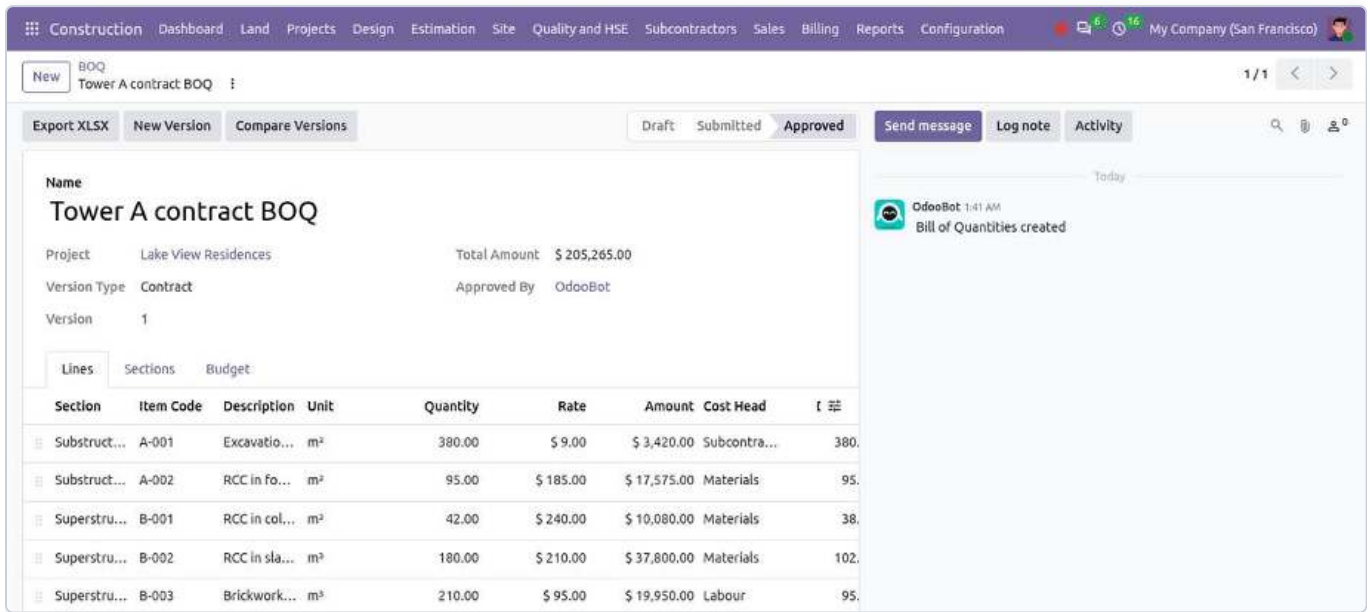
RULE Lines can only be imported into a draft BOQ. The file must follow the standard template; quantity and rate must be numbers.

Approve and version

Draft → Submitted → Approved

- 1 Click **Submit**. A BOQ needs at least one line.
- 2 The project manager clicks **Approve**. The approved BOQ becomes the budget of the project.
- 3 To change an approved BOQ, click **New Version**: a copy is created as the next version and the old one is kept as superseded.

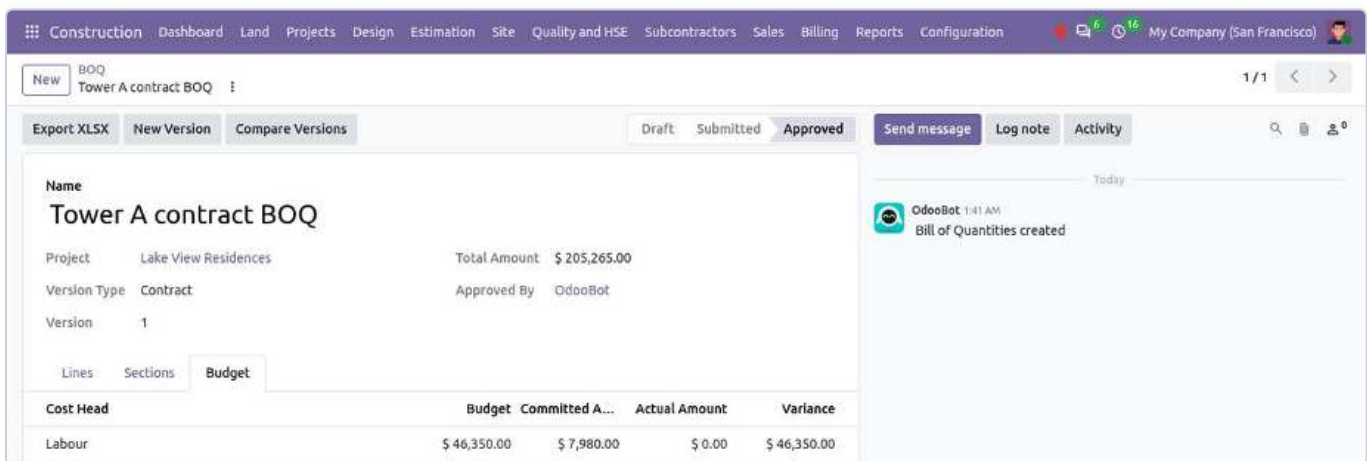
- 4 **Compare Versions** shows two versions side by side with the difference per item. **Export XLSX** downloads the BOQ.



The screenshot shows the Odoo BOQ interface for 'Tower A contract BOQ'. The status is 'Approved'. The table lists items with columns: Section, Item Code, Description, Unit, Quantity, Rate, Amount, Cost Head, and Unit Price. The total amount is \$205,265.00.

Section	Item Code	Description	Unit	Quantity	Rate	Amount	Cost Head	Unit Price
Substruct...	A-001	Excavatio...	m²	380.00	\$ 9.00	\$ 3,420.00	Subcontra...	380.
Substruct...	A-002	RCC in fo...	m²	95.00	\$ 185.00	\$ 17,575.00	Materials	95.
Superstru...	B-001	RCC in col...	m³	42.00	\$ 240.00	\$ 10,080.00	Materials	38.
Superstru...	B-002	RCC in sla...	m³	180.00	\$ 210.00	\$ 37,800.00	Materials	102.
Superstru...	B-003	Brickwork...	m³	210.00	\$ 95.00	\$ 19,950.00	Labour	95.

Figure 52. An approved BOQ.



The screenshot shows the Odoo BOQ interface for 'Tower A contract BOQ' with the 'Budget' tab selected. The table displays budget, committed, and actual amounts per cost head.

Cost Head	Budget	Committed A...	Actual Amount	Variance
Labour	\$ 46,350.00	\$ 7,980.00	\$ 0.00	\$ 46,350.00

Figure 53. The Budget tab: budget, committed and actual amount per cost head.

8.2 Rate Library

MENU Construction > Estimation > Rate Library

A rate analysis explains how a unit rate is built. Type the **Name**, **Code** and **Unit**; add the components (type, product, quantity, rate); set **Overhead (%)** and **Profit (%)**. The **Unit Rate** is computed and can be printed with gear icon > Print > **Rate Analysis**.

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My Company (San Francisco)

New

Rate Library

New

Name

Code

Unit

Company

My Company (San Francisco)

Type

Direct Cost

Overhead (%)

Profit (%)

Unit Rate

\$ 0.00

0.00

0.00

\$ 0.00

Type

Product

Description

Quantity

Rate

Amount

Add a line

Figure 54. A new rate analysis.

8.3 Budget vs Actual

MENU

Construction > Estimation > Budget vs Actual

One line per BOQ item, grouped by project, with the **Quantity**, **Done Qty**, **Budget**, **Committed Amount** (ordered or contracted), **Actual Amount** and **Variance**. Click a project line to unfold its items.

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16

My Company (San Francisco)

Budget vs Actual

Project

Search...

1-1 / 1

Project

Section

Item Code

Description

Cost Head

Unit

Quantity

Done Qty

Budget

Committed A...

Actual Amount

Variance

Lake View Residences

9 records

3,739.00

710.00

\$ 205,265.00

\$ 205,265.00

Figure 55. Budget vs Actual.

NOTE

When the actual cost of a line passes the **Budget Alert Threshold** of the settings, the project manager is alerted.

9 Site Operations

The daily work of the site engineer, the store and the labour officer.

9.1 Daily Site Reports

MENU

Construction > Site > Daily Site Reports

Who: Site Engineer, Project Manager

1

Click **New**. Choose the **Project** and **Site**; the **Date** is today.

2

Choose the **Weather** and type the **Temperature**.

3

Tab **Work Done**: one line per task worked on today, with the **BOQ Line** and the **Quantity Done**.

4

Tab **Manpower**: the number of workers per **Trade**, their **Hours** and their supplier.

5

Tabs **Equipment** and **Materials**: what was used. Tab **Delays**: the **Cause**, **Hours Lost** and a description.

6

Tab **Photos**: add site photos. Tab **3D Updates**: the progress of 3D elements. Tab **Visitors and Summary**: visitors and notes.

7

Click **Submit**. The project manager clicks **Approve**.

Draft

Submitted

Approved

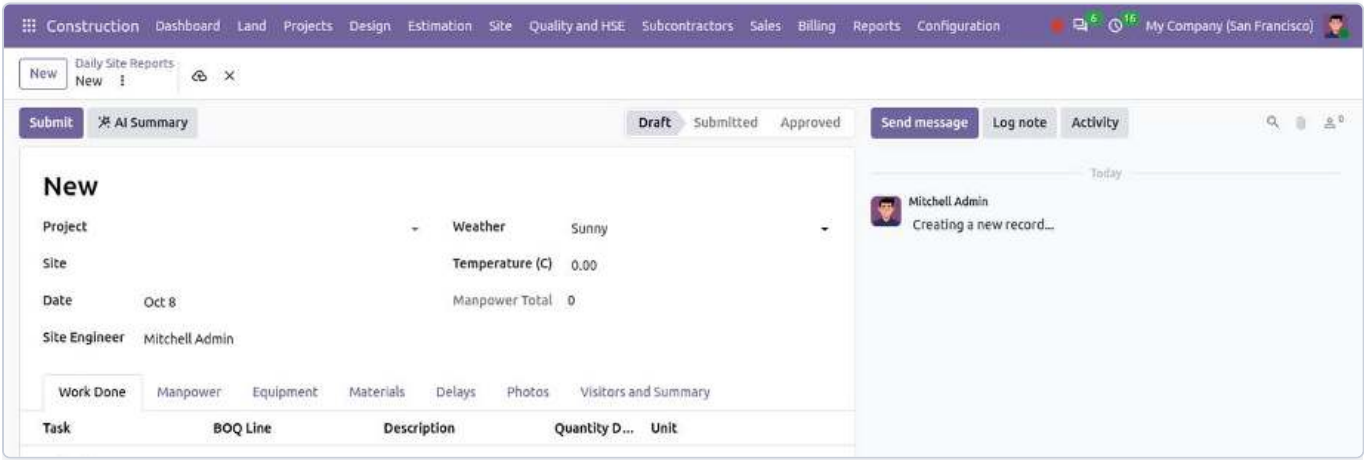


Figure 56. A new daily site report.

DSR/LVS/261004

Project: Lake View Residences | Weather: Sunny
 Site: Lake View Site | Temperature (C): 29.00
 Date: Oct 4 | Manpower Total: 20
 Site Engineer: Sam Site

Work Done | Manpower | Equipment | Materials | Delays | Photos | Visitors and Summary

Task	BOQ Line	Description	Quantity D...	Unit
Superstructure complete	B-002	RCC in slabs and beams	38.00	m³
Brickwork	B-003	Brickwork in walls	40.00	m³

Figure 57. A submitted report, tab Work Done.

Work Done	Manpower	Equipment	Materials	Delays	Photos	Visitors and Summary
Trade	Count	Hours	Supplier / Subcontractor			
Mason	6	8.00				
Steel Fixer	4	8.00				
Helper	10	8.00				
Add a line						
	20					

Figure 58. The Manpower tab.

- The quantities of submitted and approved reports raise the **Done Quantity** of the tasks and BOQ lines, and so the progress of the project.
- **AI Summary** writes the summary from the lines of the report.
- A site with no report for the day appears on the dashboard as **Missing today**.

RULE An approved daily site report is locked; only the project manager can **Unlock** it. Work cannot be reported on a task while a hold-point inspection of a previous task has not passed. The cumulative quantity of an item cannot exceed its BOQ quantity plus approved variations.

9.2 Material Requisitions

MENU Construction > Site > Material Requisitions

Who: Site Engineer, Procurement / Store, Project Manager

- 1 Click **New**. Choose the **Project**, **Site** and **Required Date**.
- 2 Tab **Items**: add each **Product** with its **Quantity** and the **BOQ Line** it is for. **Remaining** shows what the BOQ still allows.
- 3 Click **Submit**. The project manager or procurement clicks **Approve**.
- 4 Procurement chooses a **Vendor** and clicks **Create RFQ** to create a request for quotation in the Purchase app, or **Transfer from Central Store** to move stock to the site warehouse.

- 5 With two or more quotations, **Compare Quotations** shows them side by side to select one.
- 6 When the goods arrive, click **Mark Received**.



Figure 59. A material requisition.

RULE A requisition needs at least one item and must be approved before ordering. Create RFQ needs a vendor; a transfer needs a site warehouse on the site and a central warehouse.

Construction > Site > Material Consumption records what was really used on site: product, quantity, wastage and the BOQ line. A wastage quantity needs a reason, and a posted consumption cannot be deleted.

9.3 Labour Register and Attendance

MENU **Construction > Site > Labour Register**

Who: HR / Labour Officer, Site Engineer, Project Manager

Register each worker once: **Name, Trade, Labour Supplier, Daily Rate** and **Overtime Rate**. Click **New** and type directly in the list.

Name	Trade	Labour Supplier	Phone	Daily Rate	Overtime Rat...	ID Reference
☐ Abdul Mason	Mason	Solid Rock Builders		\$ 18.00	\$ 3.00	
☐ Babul Mason	Mason	Solid Rock Builders		\$ 18.00	\$ 3.00	
☐ Jamal Helper	Helper	Solid Rock Builders		\$ 11.00	\$ 1.83	
☐ Kamal Steel Fixer	Steel Fixer	Solid Rock Builders		\$ 20.00	\$ 3.33	

Figure 60. The labour register.

MENU **Construction > Site > Labour Attendance**

- 1 Click **New**, choose the **Site**; the **Date** is today.
- 2 Click **Load Yesterday's Workers** to copy the list of the day before, or add workers with **Add a line**.
- 3 Tick **Present**, and type the **Hours** and **Overtime Hours** of each worker.
- 4 Click **Confirm**.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration My Company (San Francisco)

New Labour Attendance Lake View Site 2026-10-07 1/1

Reset to Draft Draft Confirmed

Site Lake View Site Date Oct 7
Project Lake View Residences Present Count 4

Labour	Trade	Present	Hours	Overtime H...	Task
Abdul Mason	Mason	☒	8.00	2.00	
Babul Mason	Mason	☒	8.00	2.00	
Kamal Steel Fixer	Steel Fixer	☒	8.00	0.00	

Figure 61. A confirmed attendance sheet.

RULE Add the workers before confirming the attendance.

9.4 Wage Sheets

MENU Construction > Site > Wage Sheets

Who: HR / Labour Officer, Accountant, Project Manager

- 1 Click **New**. Choose the **Site**, the **Period Start** and **Period End**, and optionally a **Labour Supplier**.
- 2 Click **Compute from Attendance**. One line per worker appears with days, hours, overtime and amount, taken from the confirmed attendance sheets of the period.
- 3 Choose the **Payee** (the supplier or contact to pay).
- 4 The project manager or accountant clicks **Approve**.
- 5 The accountant clicks **Create Bill** to create the vendor bill.

Draft → Approved → Billed

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration My Company (San Francisco)

New Wage Sheets WS/2026/0002 1/1

Compute from Attendance Approve Draft Approved Billed Send message Log note

WS/2026/0002

Site Lake View Site Period Start Sep 7
Project Lake View Residences Period End Oct 7
Labour Supplier Total \$ 0.00
Payee Vendor Bill

Labour	Days	Hours	Overtime H...	Daily Rate	Overtime Rate	Amount
--------	------	-------	---------------	------------	---------------	--------

Today

OdooBot 1:52 AM
Wage Sheet created

Figure 62. A draft wage sheet before its lines are computed.

Construction > Site > PPE Issues records the protective equipment given to a worker or a staff member, with the return date.

9.5 Equipment

MENU

Construction > Site > Equipment Allocations

Who: Site Engineer, Procurement / Store, Project Manager

- 1

Click **New**. Choose the **Equipment** (from the Maintenance app), the **Project**, the **Site** and the dates.
- 2

Choose **Owned** or **Rented**. For rented equipment, choose the **Rental Vendor**, the **Rate** and the **Rate Basis**.
- 3

Each day, add a log line: **Hours Used**, **Fuel Qty**, **Fuel Cost** and **Operator**.
- 4

Create Rental Bill bills the unbilled usage of rented equipment. **Maintenance Request** opens a request in the Maintenance app.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration

616 My Company (San Francisco)

New

Equipment Allocations

Concrete Mixer 350 L @ Lake View Site

1 / 1

Create Rental Bill

Maintenance Request

EquipmentConcrete Mixer 350 L

ProjectLake View Residences

SiteLake View Site

Date FromSep 27

Date To

Ownership☐ Owned ☒ Rented

Rental VendorPrime Building Materials

Rate ?\$ 45.00

Rate BasisPer Day

Hours Used26.00

Usage Cost\$ 252.00

Utilization (%) 27 %

Date

Hours Used

Fuel Qty

Fuel Cost

Operator

Remarks

Cost

Figure 63. An equipment allocation with its daily log.

Construction > Site > Equipment Logs lists all log lines; Construction > Site > Photo Gallery shows all site photos by month.

10 Quality and HSE

10.1 Inspections

MENU Construction > Quality and HSE > Inspections

Who: Site Engineer, Project Manager

- 1 Click **New**. Choose the **Project** and a **Template**: the checklist is copied from it.
- 2 Choose the **Task**, the **Building**, **Floor** or **Unit** inspected, and the **Inspector**.
- 3 Click **Request Inspection**.
- 4 The inspector gives a **Result** to every item (with a remark or photo if needed) and clicks **Complete**.
- 5 If an item fails, the inspection is failed: click **Raise NCR** to open a non-conformance report, and **Re-inspect** after the correction.

Draft → Requested → Passed

The screenshot displays the 'INS/2026/0001' inspection form in the 'Requested' state. The form includes fields for Project, Building, Floor, Task, and Inspector. A yellow 'HOLD POINT' banner is prominently displayed. The checklist table lists items such as 'Bar diameter and spacing as per drawing', 'Lap length and anchorage', and 'Cover blocks in place'. The right sidebar shows a chat message from OdooBot: 'Quality Inspection created'.

Figure 64. A requested hold-point inspection.

RULE Every checklist item needs a result before the inspection can be completed. A hold-point inspection that has not passed blocks the reporting of the following work.

10.2 NCRs (Non-Conformance Reports)

MENU Construction > Quality and HSE > NCRs

Describe the defect, choose the **Category**, the **Responsible** person and the **Due Date**, and add a photo. Click **Start Corrective Action**, fill **Root Cause** and **Corrective Action**, then **Close**.

Open → Corrective Action → Closed

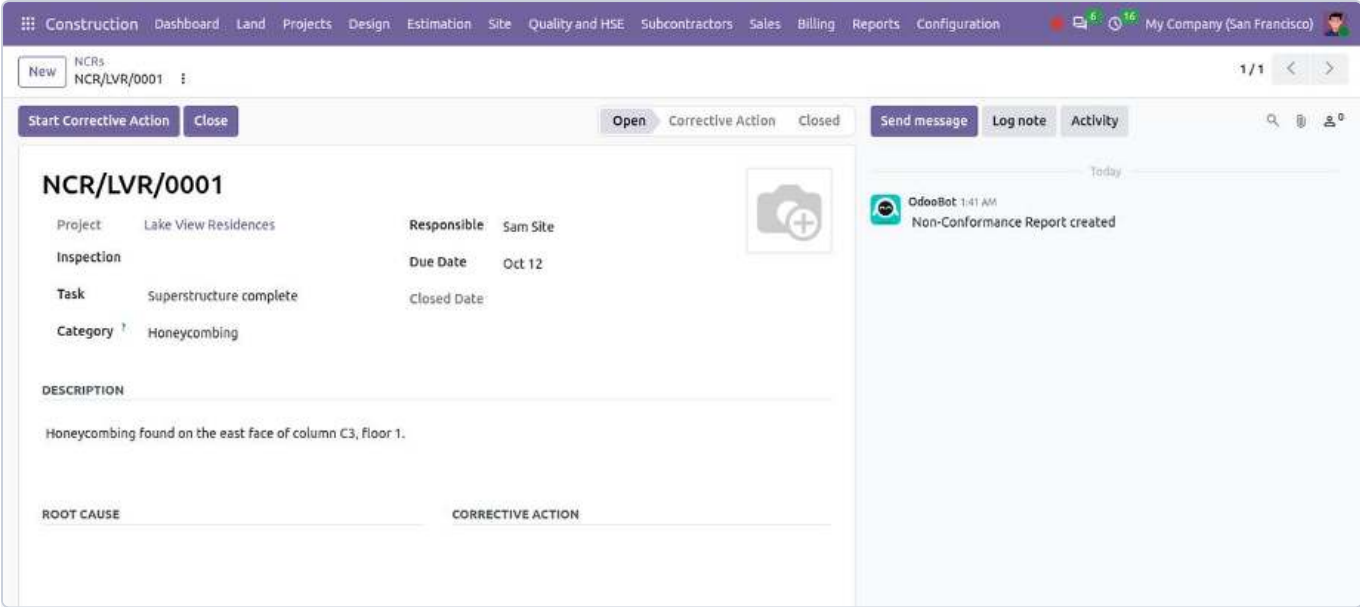


Figure 65. An open NCR.

RULE Describe the corrective action before closing the NCR.

10.3 Snags

MENU Construction > Quality and HSE > Snags

A snag is a small defect in a unit. Choose the **Unit** and **Room**, the **Category**, who must fix it and by when. The fixer clicks **Mark Fixed**; the inspector clicks **Close**, or **Reopen** if it is not right. **Tag Photo (AI)** proposes a category from the photo.

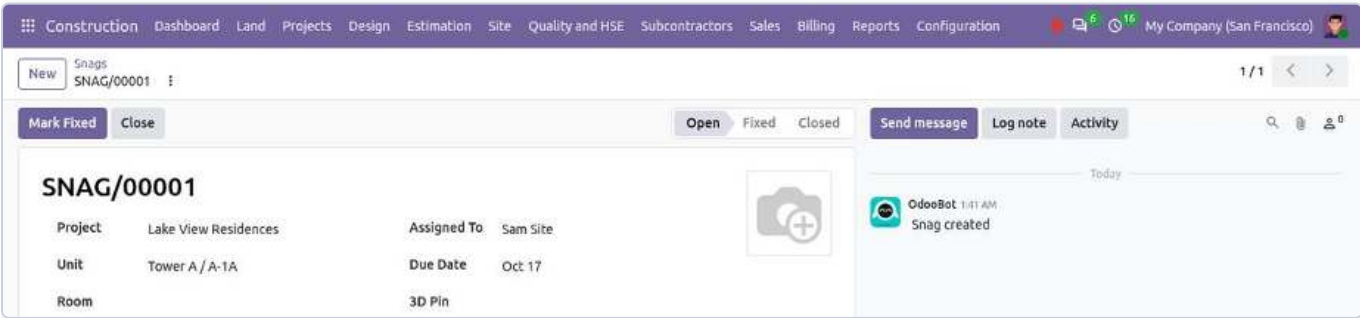


Figure 66. A snag.

CAREFUL Open snags block the handover of the unit (chapter 11).

10.4 Material Tests

MENU

Construction > Quality and HSE > Material Tests

Record laboratory tests such as concrete cubes: **Test Type**, **Sample Reference**, **Laboratory**, dates, the **Required Value** and the **Result Value**. The **Result** shows Pass or Fail. Attach the lab report with **Files**.

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6 16 My Company (San Francisco)

New

Material Tests

CUBE-F1-07

1 / 1

Project

Lake View Residences

Sample Date

Sep 2

Test Type

Concrete Cube

Test Date

Sep 30

Sample Reference

CUBE-F1-07

Required Value

25.00

Laboratory

Vertex Consultants

Result Value

27.40

Unit

MPa

Send message

Log note

Today

OdooBot 1:11 AM

Material Test created

Figure 67. A material test.

10.5 Incidents, Toolbox Talks and Work Permits

MENU

Construction > Quality and HSE > Incidents

Report every accident and near miss: **Incident Type**, **Severity**, date, description and persons involved. Tick **Lost-Time Incident** when someone could not work. Click **Investigate**, write the **Root Cause**, list the corrective actions, and the project manager clicks **Close**.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration

6 16 My Company (San Francisco)

New

Incidents

HSE/2026/0001

1 / 1

Close

Reported

Under Investigation

Closed

Send message

Log note

Activity

Today

OdooBot 1:41 AM

HSE Incident created

HSE/2026/0001

Project

Lake View Residences

Incident Type

Near Miss

Site

Lake View Site

Severity

Medium

Date

Sep 19, 4:30 PM

Lost-Time Incident

☐

Description

A scaffold board slipped from level 2; the area below was cordoned off and nobody was hurt.

Persons Involved

Root Cause

Action

Responsible

Due Date

Done

Figure 68. An incident under investigation.

Toolbox Talks records a safety briefing: topic, site, the workers and staff who attended, and who gave it.

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My Company (San Francisco)

New

Toolbox Talks

Working at height

1 / 1

Topic

Working at height

Date

Oct 6

Project

Lake View Residences

Conducted By

Sam Site

Site

Lake View Site

Workers

Abdul Mason

Babul Mason

Xamul Steel Fixer

Figure 69. A toolbox talk.

Work Permits control dangerous work (at height, hot work ...). Fill the **Permit Type**, **Location**, **Issued To**, validity and **Precautions**; click **Request**. The project manager clicks **Approve** or **Reject**. When the work is finished, click **Close Permit**.



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My Company (San Francisco)

New

Work Permits

PTW/2026/0001

1 / 1

Approve

Reject

Draft

Requested

Approved

Closed

Send message

Log note

PTW/2026/0001

Project

Lake View Residences

Valid From

Oct 7, 1:00 PM

Permit Type

Work at Height

Valid To

Oct 10, 12:00 AM

Location

Tower A, floor 3 slab edge

Approved By

Today

OdooBot

1:41 AM

Work Permit created

Figure 70. A requested work permit.

11 Subcontractors

11.1 Subcontracts

MENU Construction > Subcontractors > Subcontracts

Who: Project Manager, Procurement / Store, Accountant

- 1 Click **New**. Choose the **Project** and the **Subcontractor**, the **Start Date** and **End Date**.
- 2 Type the **Retention (%)**, the **Advance Amount** and the **Advance Recovery (%)**.
- 3 Tab **Items**: add the BOQ lines given to the subcontractor with the agreed **Quantity** and **Rate**.
- 4 Tab **Scope**: describe the scope of work.
- 5 The project manager clicks **Confirm**. When all work is done, **Complete**.

Draft → Active → Completed

The screenshot displays the Odoo Subcontractors interface for an active subcontract (SC/2026/0001). The top navigation bar includes various modules like Construction, Dashboard, Land, Projects, Design, Estimation, Site, Quality and HSE, Subcontractors, Sales, Billing, Reports, and Configuration. The user is logged in as 'My Company (San Francisco)'. The interface shows the subcontract details for 'Lake View Residences' project, managed by 'Solid Rock Builders'. Key fields include Start Date (Aug 28), End Date (Dec 26), and Performance Rating (4 stars). Financial details show an Amount Total of \$7,980.00, Retention (%) of 5.00, Advance Amount of \$0.00, and Advance Recovery (%) of 10.00. The 'Items' tab is active, showing a table with BOQ Line, Description, Unit, Quantity, Rate, and Amount. The table contains one item: B-003 Brickwork in walls, with a quantity of 210.00 and a rate of \$38.00, totaling \$7,980.00. The 'Scope' tab is also visible. The 'Ledger' button is present, which shows all measurements and bills. The 'Activity' panel on the right shows a message from OdooBot: 'Subcontract Agreement created'.

BOQ Line	Description	Unit	Quantity	Rate	Amount
B-003	Brickwork in walls	m²	210.00	\$ 38.00	\$ 7,980.00

Figure 71. An active subcontract. The Ledger button shows all its measurements and bills.

RULE A subcontract needs at least one item, and only a draft subcontract can be confirmed.

11.2 Work Orders

MENU Construction > Subcontractors > Work Orders

A work order tells the subcontractor to start a part of the job. Choose the **Subcontract**, the **Task**, the dates and describe the work, then click **Issue**, **Start** and **Done**.

Draft → Issued → In Progress → Done

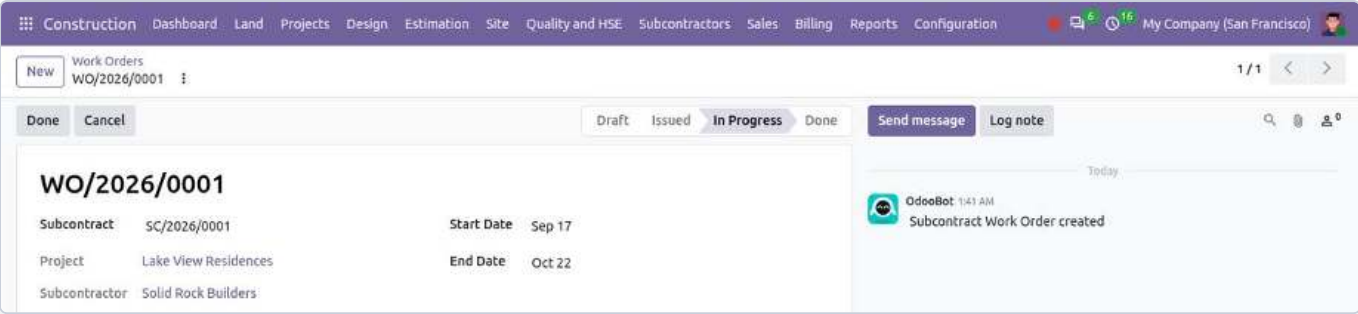


Figure 72. A work order in progress.

11.3 Measurements and bills

MENU

Construction > Subcontractors > Measurements

- 1
- Click **New** and choose the **Subcontract**. Its items are loaded.
- 2
- Type the quantity done **This Period** on each line. **Previous Qty** and **Cumulative** are computed.
- 3
- The site engineer or project manager clicks **Verify**.
- 4
- Click **Create Bill**. The vendor bill is created for the **Net Amount**: gross amount less retention and advance recovery.

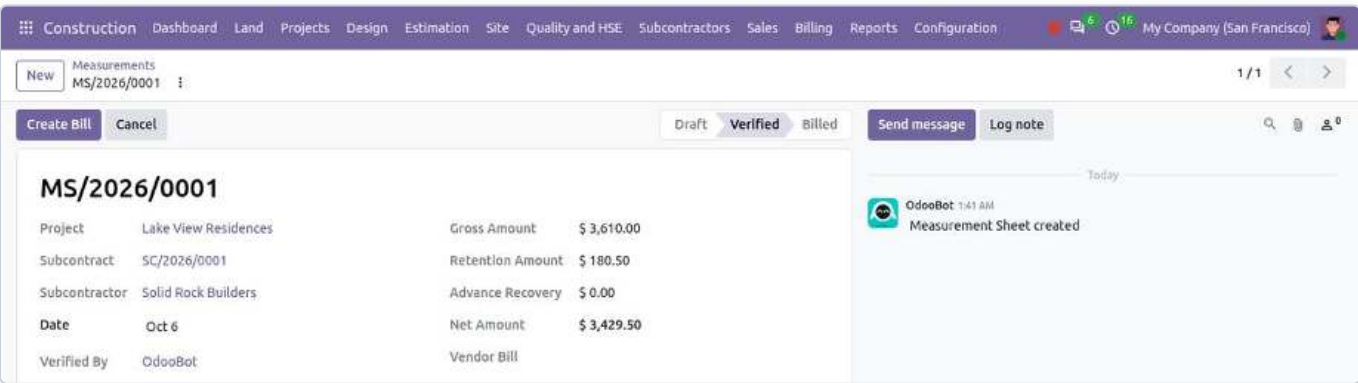


Figure 73. A verified measurement sheet.

RULE

Enter the measured quantities first. The cumulative quantity cannot exceed the subcontract quantity. A billed measurement sheet cannot be cancelled.

12.1 Unit Availability

MENU Construction > Sales > Unit Availability

Who: Sales, Director, Accountant

The board shows every unit as a card, one column per floor. The coloured edge and the label give the status at a glance. Click a card to open the unit.

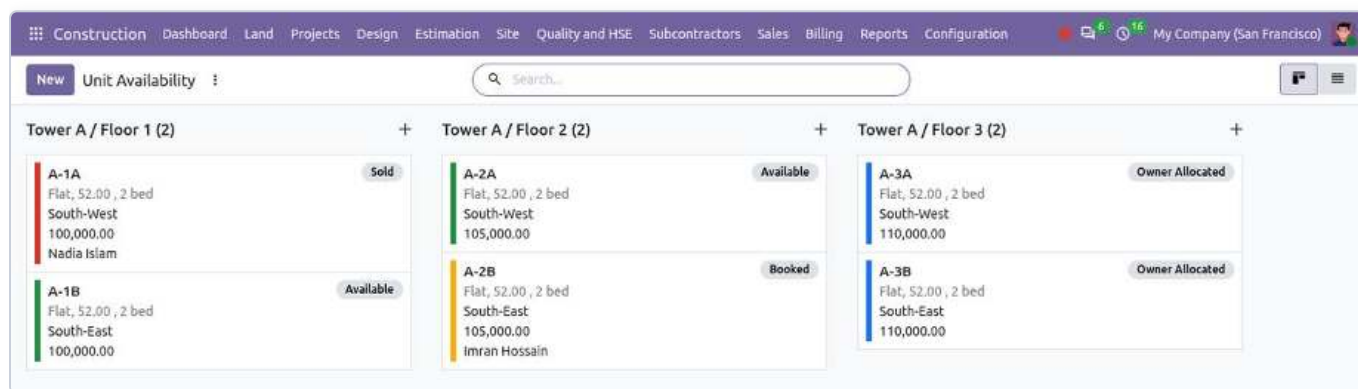


Figure 74. The unit availability board.

12.2 Opportunities and Enquiries

Construction > Sales > Opportunities is the CRM pipeline of Odoo, for the Sales role. Construction > Sales > Enquiries is a simpler list for walk-in and phone enquiries:

- 1 Click **New**. Type the **Subject**, the contact's name, **Phone** and **Email**.
- 2 Choose the **Project**, the wanted **Unit Type** and the **Budget**.
- 3 Click **Qualify** when the person is serious, then **Create Booking** to open a booking with the data filled in. **Mark Lost** closes the enquiry.

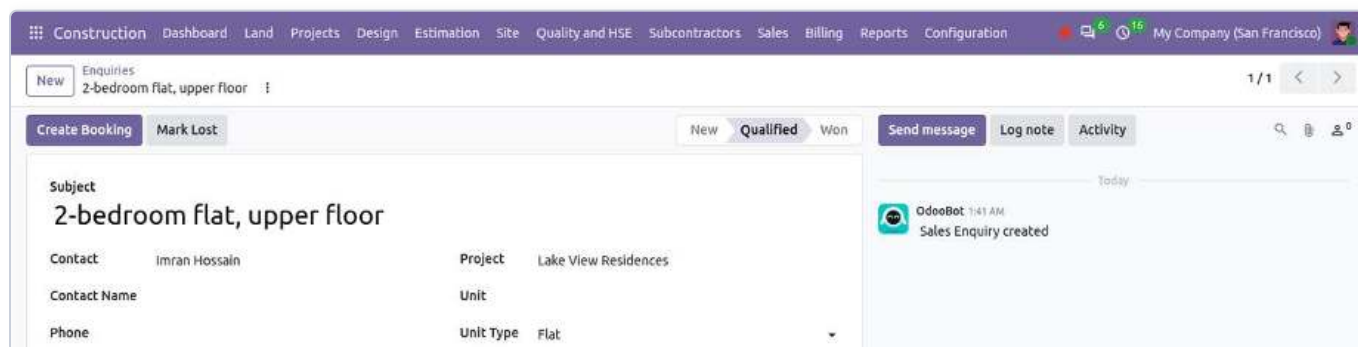


Figure 75. A qualified enquiry.

12.3 Bookings

Create and confirm a booking

- 1

Click **New**.
- 2

Choose the **Unit** (only available units can be booked) and, if wanted, a **Parking**.
- 3

Choose the **Customer**.
- 4

Check the **Unit Price**, type a **Discount** if any, and the **Parking and Extras**. **Total Price** is computed.
- 5

Choose the **Installment Plan**.
- 6

Click **Confirm Booking**.

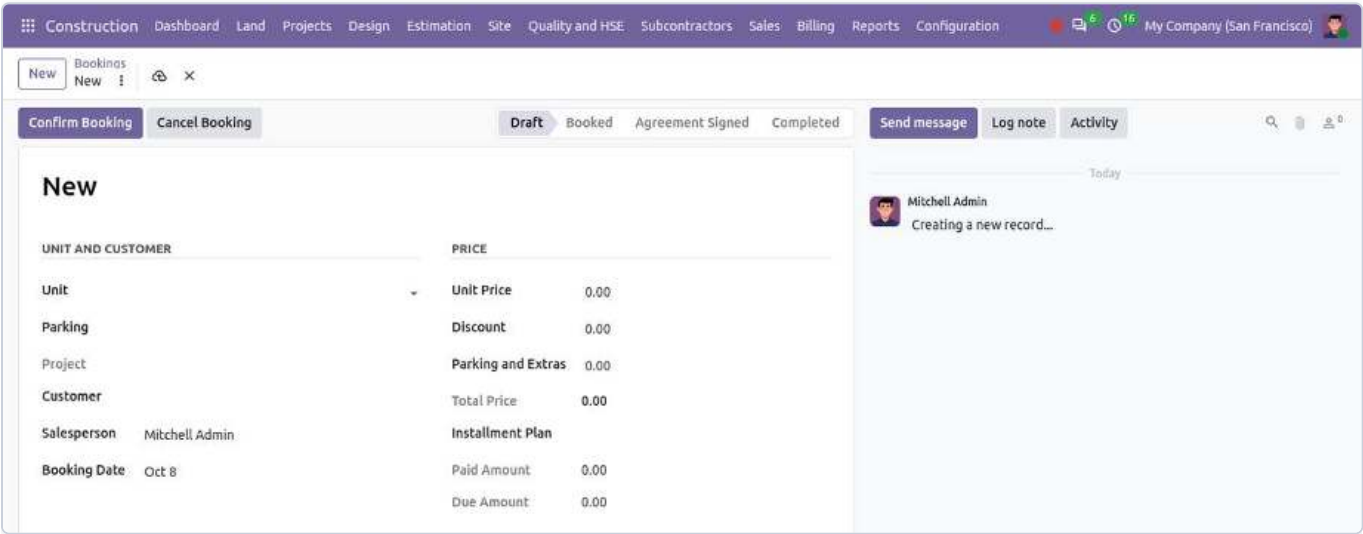


Figure 76. A new booking.

On confirmation the system does four things by itself: the unit becomes **Booked**, the installments are created from the plan, the linked opportunity is marked won, and the customer receives a confirmation email with a link to their portal.



BK/2026/0001

UNIT AND CUSTOMER		PRICE	
Unit	Tower A / A-1A	Unit Price	\$ 100,000.00
Parking	Tower A / A-P02	Discount	\$ 0.00
Project	Lake View Residences	Parking and Extras	\$ 8,000.00
Customer	Nadia Islam	Total Price	\$ 108,000.00
Salesperson	Sara Sales	Installment Plan	Standard: 10 / 20 / construction linked / ...
Booking Date	Aug 23	Paid Amount	\$ 0.00
Agreement Date	Oct 7	Due Amount	\$ 108,000.00

Name	Due Date	Milestone	Amount	Paid Amount	Invoice	State
On booking	Aug 23		\$ 10,800.00	\$ 0.00	Overdue	Invoice
On agreement	Sep 22		\$ 21,600.00	\$ 0.00	Overdue	Invoice
Foundation c...	Oct 7	Foundation c...	\$ 16,200.00	\$ 0.00	Due	Invoice
Superstructu...		Superstructu...	\$ 27,000.00	\$ 0.00	Scheduled	Invoice
Finishing co...		Finishing co...	\$ 21,600.00	\$ 0.00	Scheduled	Invoice
On handover		Handover	\$ 10,800.00	\$ 0.00	Scheduled	Invoice

Activity

Today

OdooBot 1:41 AM
Dear Nadia Islam,
The installment "Foundation complete" of booking **BK/2026/0001** (\$ 16,200.00) is due on 10/07/2026.

OdooBot 1:41 AM
Dear Nadia Islam,
The installment "On agreement" of booking **BK/2026/0001** (\$ 21,600.00) was due on 09/22/2026.

OdooBot 1:41 AM
Dear Nadia Islam,
The installment "On booking" of booking **BK/2026/0001** (\$ 10,800.00) was due on 08/23/2026.

OdooBot 1:41 AM
Dear Nadia Islam,
Your booking **BK/2026/0001** of unit Tower A / A-1A is confirmed. Total price: \$ 108,000.00.
You can follow your payment schedule in your portal.

OdooBot 1:41 AM
Unit Booking created

Figure 77. A booking with its installments.

RULE A unit allocated to a land owner cannot be booked, and a unit can have only one active booking. The discount must be between zero and the unit price; a discount above the **Discount Limit** of the settings needs a Director.

Agreement, documents and changes

- After the sale agreement is signed, click **Agreement Signed**. The unit becomes **Sold**.
- Gear icon > **Print** gives the **Allotment Letter**, the **Sale Agreement** and the **Customer Statement**.
- **Transfer** moves the booking to another customer: choose the **New Customer**, the **Transfer Fee** and the **Reason**.
- **Cancel Booking** frees the unit. Type the reason in the tab **Cancellation / Transfer** first.



Figure 78. The Print menu of a booking.

Transfer Booking

Booking: BK/2026/0002

Current Customer: Imran Hossain

New Customer:

Transfer Fee: \$ 0.00

Reason:

Transfer **Discard**

Figure 79. The Transfer Booking wizard.

12.4 Installments and payments

MENU Construction > Sales > Installments

Who: Sales, Accountant

The list opens on the unpaid installments of all bookings. Overdue lines are red.

- 1 Click **Invoice** at the end of an installment line (here or on the booking). A customer invoice is created.
- 2 Confirm the invoice and register the payment in the usual Odoo accounting way.
- 3 The **Paid Amount** and the status of the installment follow the invoice by themselves.

Construction Dashboard Land Projects Design Estimation Site Quality and HSE Subcontractors Sales Billing Reports Configuration										
My Company (San Francisco)										
Installments										
Booking	Customer	Unit	Name	Due Date	Amount	Penalty Amount	Paid Amount	Invoice	State	
BK/2026/0002	Imran Hossain	Tower A / A-2B	On booking	Oct 1	\$ 10,300.00	\$ 0.00	\$ 0.00		Overdue	Invoice
BK/2026/0002	Imran Hossain	Tower A / A-2B	On agreement	Oct 31	\$ 20,600.00	\$ 0.00	\$ 0.00		Scheduled	Invoice
BK/2026/0002	Imran Hossain	Tower A / A-2B	Foundation complete	Oct 7	\$ 15,450.00	\$ 0.00	\$ 0.00		Due	Invoice
BK/2026/0002	Imran Hossain	Tower A / A-2B	Superstructure complete		\$ 25,750.00	\$ 0.00	\$ 0.00		Scheduled	Invoice
BK/2026/0002	Imran Hossain	Tower A / A-2B	Finishing complete		\$ 20,600.00	\$ 0.00	\$ 0.00		Scheduled	Invoice
BK/2026/0002	Imran Hossain	Tower A / A-2B	On handover		\$ 10,300.00	\$ 0.00	\$ 0.00		Scheduled	Invoice
BK/2026/0001	Nadia Islam	Tower A / A-1A	On booking	Aug 23	\$ 10,800.00	\$ 0.00	\$ 0.00		Overdue	Invoice
BK/2026/0001	Nadia Islam	Tower A / A-1A	On agreement	Sep 22	\$ 21,600.00	\$ 0.00	\$ 0.00		Overdue	Invoice

Figure 80. Installments of all bookings.

Status	Meaning
Scheduled	Not yet due (a milestone not reached, or a future date).
Due	The due date or the milestone is reached.
Overdue	The due date is past and the installment is not paid.
Invoiced	An invoice exists and is not yet paid.
Paid	The invoice is paid.

NOTE A scheduled action checks installments every day. It sends reminder emails (and SMS when the setting is on) for due and overdue installments, makes milestone installments due when the construction phase is reached, and adds the **Penalty Amount** when a late payment penalty is set. Installments can only be invoiced on a confirmed booking.

12.5 Handover

MENU Construction > Sales > Handovers

- 1 On the booking, click **Handover** (or create one in the menu and choose the **Booking**). For an owner's unit, choose the **JV Contract** instead.
- 2 Set the **Handover Date**, the **Key Count** and the **Defect Liability (Months)**.
- 3 Click **Schedule and Invite**: the customer receives the invitation by email.
- 4 On the day, tick the items of the **Checklist** (all snags closed, utility meters installed and read, keys handed over, documents handed over) and note the meter readings in the tab **Meters and Override**.
- 5 Click **Hand Over**. The unit becomes **Handed Over** and the booking **Completed**.

Draft → **Scheduled** → **Handed Over**

The screenshot shows the Odoo Handover form for unit HO/2026/0001. The form is divided into several sections. The top section contains the unit details: Unit (Tower A / A-2B), Project (Lake View Residences), Booking (BK/2026/0002), and Received By (Imran Hossain). The middle section contains the handover details: Handover Date (Oct 7), Key Count (0), Signed By (blank), Defect Liability (Months) (12), and Warranty End (Oct 7, 2027). The bottom section contains a checklist with the following items: All snags closed, Utility meters installed and read, Keys handed over, and Documents handed over. The form is in the 'Draft' state, as indicated by the 'Draft' button being highlighted. The right sidebar shows the activity log with a message from OdooBot at 1:52 AM stating 'Unit Handover created'.

Figure 81. A handover with its checklist.

RULE The handover is blocked while the unit has open snags or the booking has unpaid installments. A Director can override it by typing a reason in the tab **Meters and Override**; the override is written in the chatter.

Gear icon > Print > **Possession Letter** prints the letter for the customer.

12.6 After-Sales Tickets

Complaints after handover. A ticket is created by staff with **New**, or by the customer from the portal. Fill the **Subject**, **Unit**, **Category** and **Assigned To**, then follow it with **Start**, **Resolve** and **Close**.

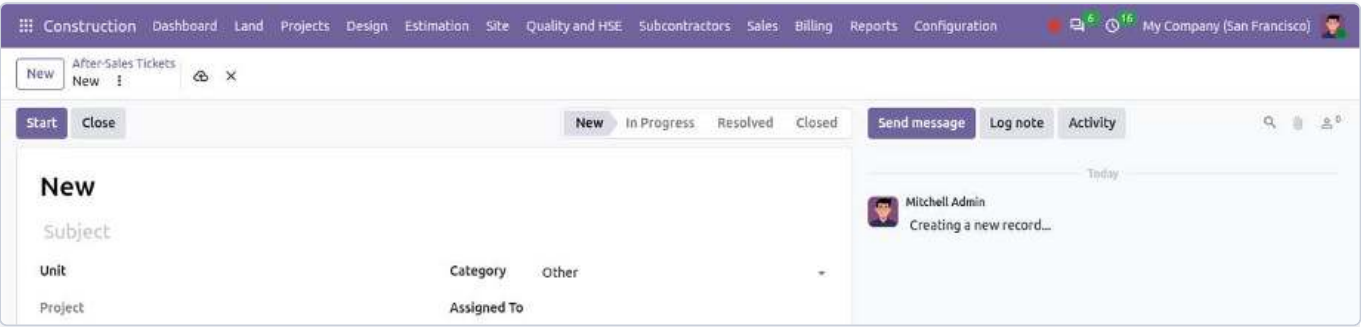


Figure 82. A new after-sales ticket.

13 Billing the Client

For projects built for a client: bill the work done, period after period.

13.1 Interim Payment Certificates (IPC)

- MENU

Construction > Billing > Generate IPC

Who: Accountant, Project Manager
- 1 Choose the **Project** and the period (**Period From**, **Period To**), then click **Generate**. A draft certificate opens with the lines of the approved BOQ; **This Period** is the work done on site since the previous certificate.
 - 2 Or create one in **Construction > Billing > IPCs** with **New** and click **Load BOQ Lines**.
 - 3 Check the **Client**. In the tab **Measured Work**, correct the quantity **This Period** of each line if needed.
 - 4 The tab **Variations** adds the approved variations.
 - 5 Click **Submit for Certification**.
 - 6 The project manager (or the consultant, from the portal) clicks **Certify**.
 - 7 The accountant clicks **Create Invoice**. The customer invoice is created for the **Net Payable**.

Figure 83. The Generate IPC wizard.



Construction

Dashboard

Land

Projects

Design

Estimation

Site

Quality and HSE

Subcontractors

Sales

Billing

Reports

Configuration

6

16

My Company (San Francisco)

New

IPCS

IPC/LVR/01

1/1

<

>

Load BOQ Lines

Submit for Certification

Draft

Submitted

Certified

Involved

Paid

Send message

Log note

Activity

0

IPC/LVR/01

Project

Lake View Residences

Client

CERTIFICATE

Consultant

Vertex Consultants

Gross Cumulative

\$ 60,560.00

Period From

Aug 8

Previous Certified

\$ 0.00

Period To

Oct 7

Current Gross

\$ 60,560.00

Certified By

Variation Amount

\$ 0.00

Certified Date

Retention (%)

5.00

% \$ 3,028.00

Advance Recovery (%)

10.00

% \$ 6,056.00

Other Deductions

\$ 0.00

Net Payable

\$ 51,476.00

Measured Work

Variations

BOQ Line	Unit	Contract Qty	Previous Qty	This Period	Cumulative ...	Rate	Amount
A-001 Exca...	m³	380.00	0.00	380.00	380.00	\$ 9.00	\$ 3,420.00
A-002 RCC ...	m³	95.00	0.00	95.00	95.00	\$ 185.00	\$ 17,575.00
B-001 RCC ...	m³	42.00	0.00	38.00	38.00	\$ 240.00	\$ 9,120.00
B-002 RCC ...	m³	180.00	0.00	102.00	102.00	\$ 210.00	\$ 21,420.00
B-003 Brick...	m³	210.00	0.00	95.00	95.00	\$ 95.00	\$ 9,025.00
C-001 Plast...	m²	2,400.00	0.00	0.00	0.00	\$ 11.00	\$ 0.00
C-002 Floo...	m²	430.00	0.00	0.00	0.00	\$ 28.00	\$ 0.00
D-001 Elec...	Units	1.00	0.00	0.00	0.00	\$ 42,000.00	\$ 0.00
D-002 Plu...	Units	1.00	0.00	0.00	0.00	\$ 36,000.00	\$ 0.00

Today

1:52 AM

Interim Payment Certificate created

Figure 84. A draft IPC. The certificate block computes retention, advance recovery and the net payable.

RULE The project needs an approved BOQ. Load or add the measured work before submitting, and set the client. Only an accountant can override the retention and advance recovery percentages. Only a certified certificate can be invoiced.

13.2 Variations

MENU Construction > Billing > Variations

A variation is extra (or less) work compared with the contract. Create it from an approved design change with **Variation Order**, or here with **New**. Choose the **Source**, add the priced lines and the **Time Extension Days**, then **Submit**. The project manager clicks **Approve** or **Reject**. An approved variation is added to the next IPC.

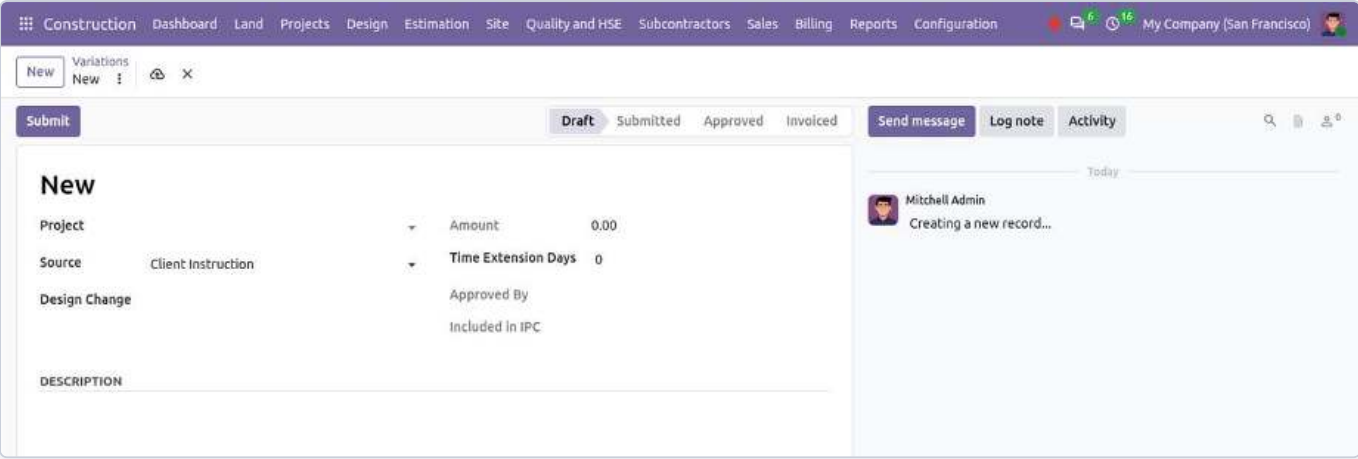


Figure 85. A new variation.

RULE Price the lines of a draft variation before submitting it.

13.3 Retention and Cash Flow

[Construction](#) > [Billing](#) > [Retention](#) lists the amounts kept back, on the client side (from IPCs) and on the subcontractor side (from measurements), with the held amount, the released amount and the balance.

[Construction](#) > [Billing](#) > [Cash Flow](#) is a pivot table of expected money in (customer installments, payment certificates) and money out (land owner payments, purchase orders, subcontracts, wages) by month. Click a + to unfold a line, and **Measures** or the chart icon to change the view.

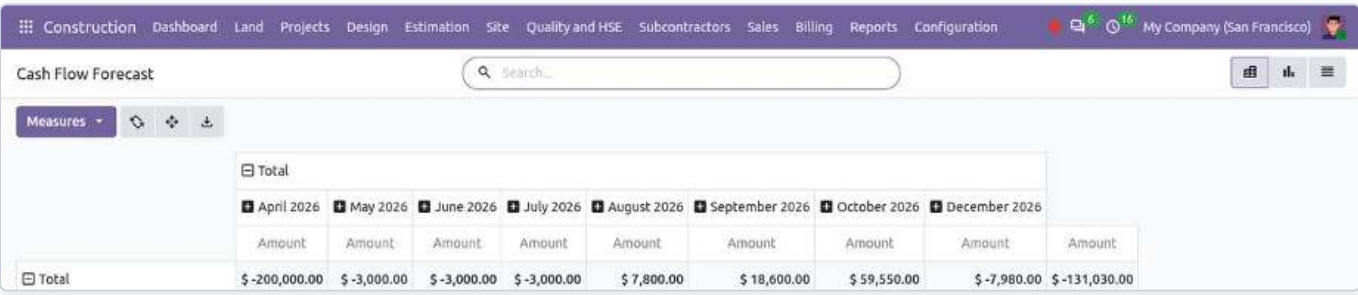


Figure 86. The cash-flow forecast.

14.1 Read the dashboard

MENU Construction > Dashboard

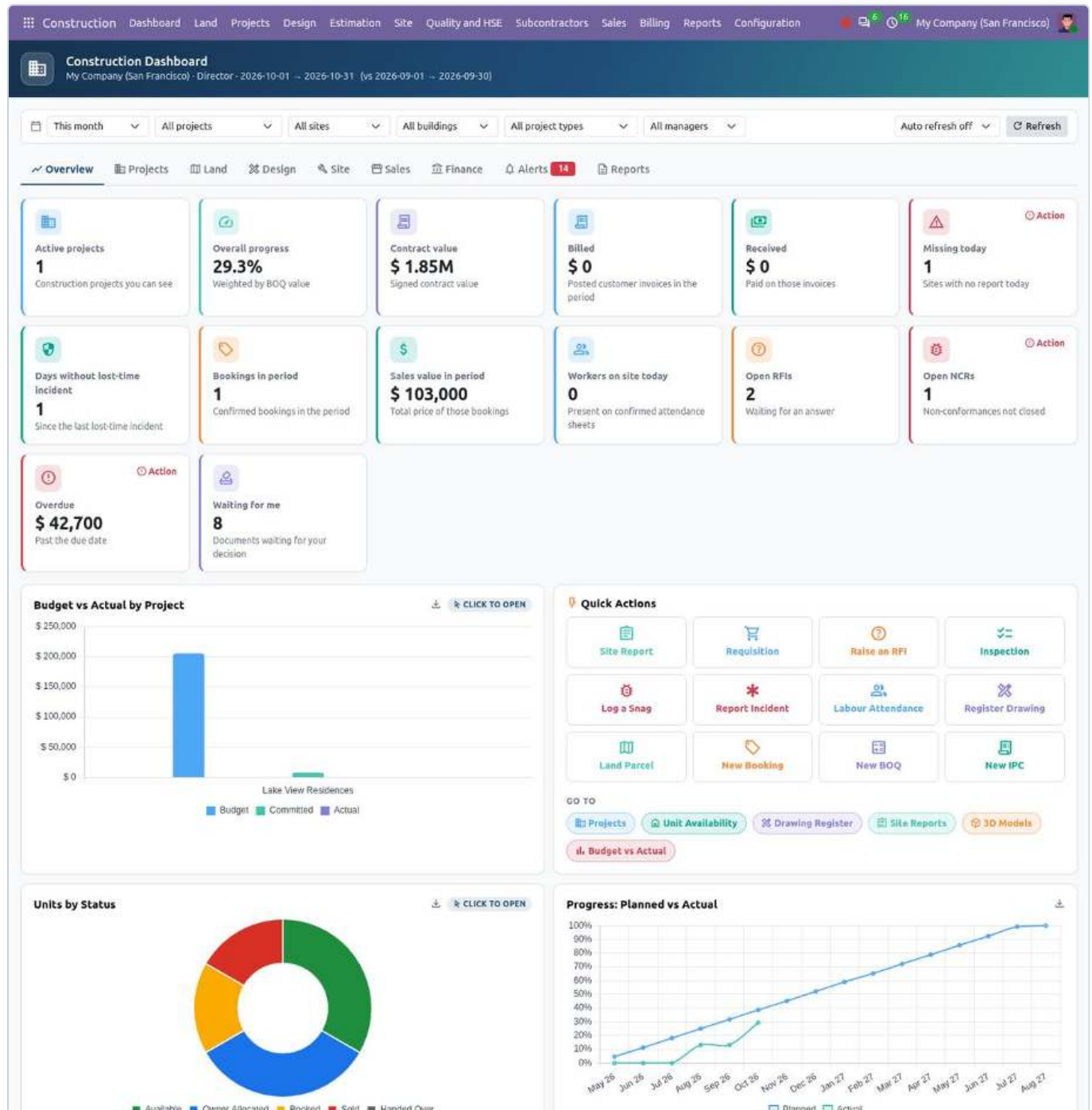


Figure 87. The dashboard, tab Overview.

- **Filter bar:** the period (This month ...), project, site, building, project type and manager. Every figure and report follows these filters.
- **Auto refresh:** choose an interval to let the figures refresh by themselves; **Refresh** recomputes now.

- **Tabs:** Overview, Projects, Land, Design, Site, Sales, Finance, Alerts and Reports. You see the tabs of your role.
- **Cards:** each card is one figure. A red **Action** flag means something needs you. Click a card to open the records behind it.
- **Charts:** **CLICK TO OPEN** opens the records; the arrow icon downloads the data.
- **Quick Actions:** one click to start a site report, a requisition, an RFI, an inspection, a snag and more.

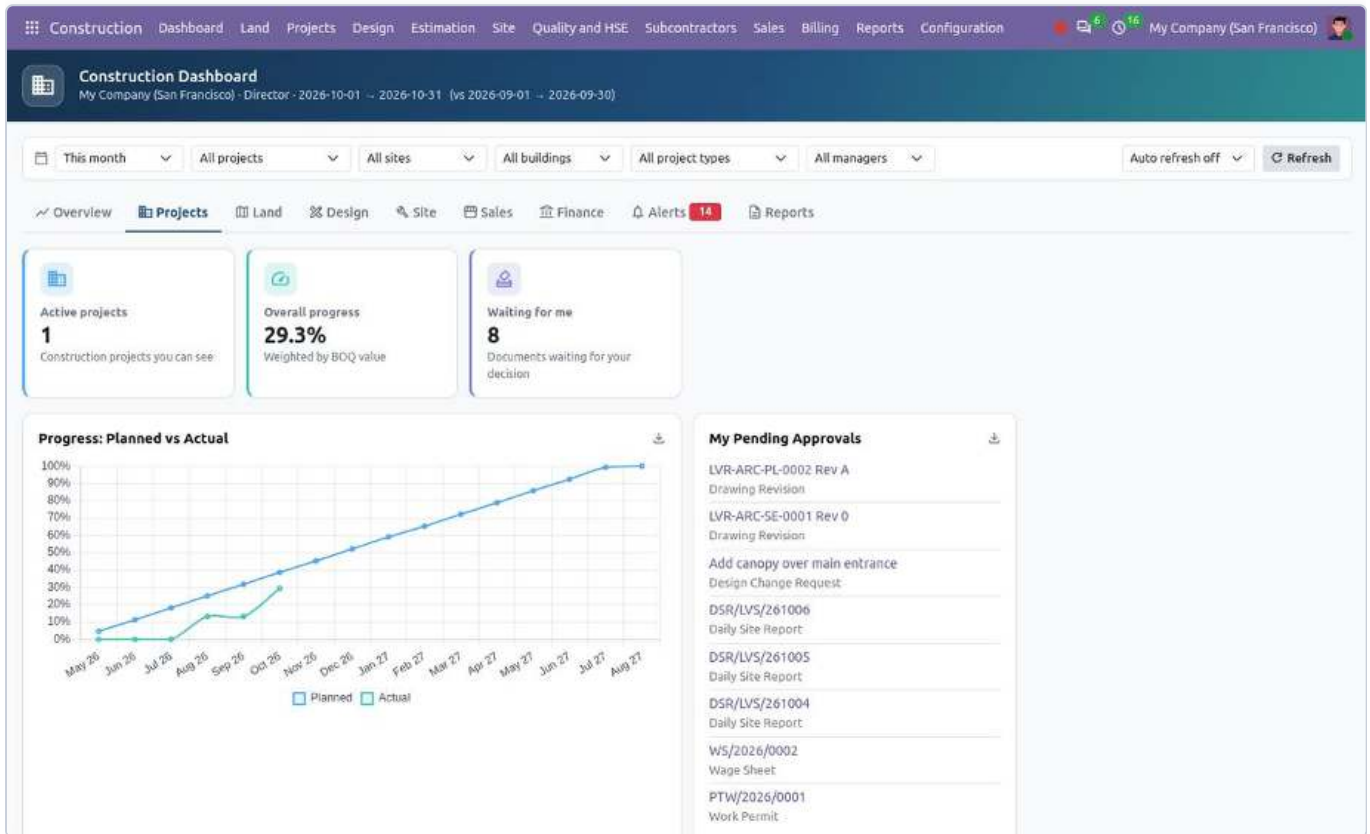


Figure 88. The Projects tab: planned against actual progress, your pending approvals, milestones and risks.

- **My Pending Approvals** lists the documents waiting for your decision; click one to open it.
- **AI Insights** shows the cost and delay risk of each project with its reasons.
- **Ask the Dashboard:** type a question about the figures you see and click **Ask** (AI provider needed).

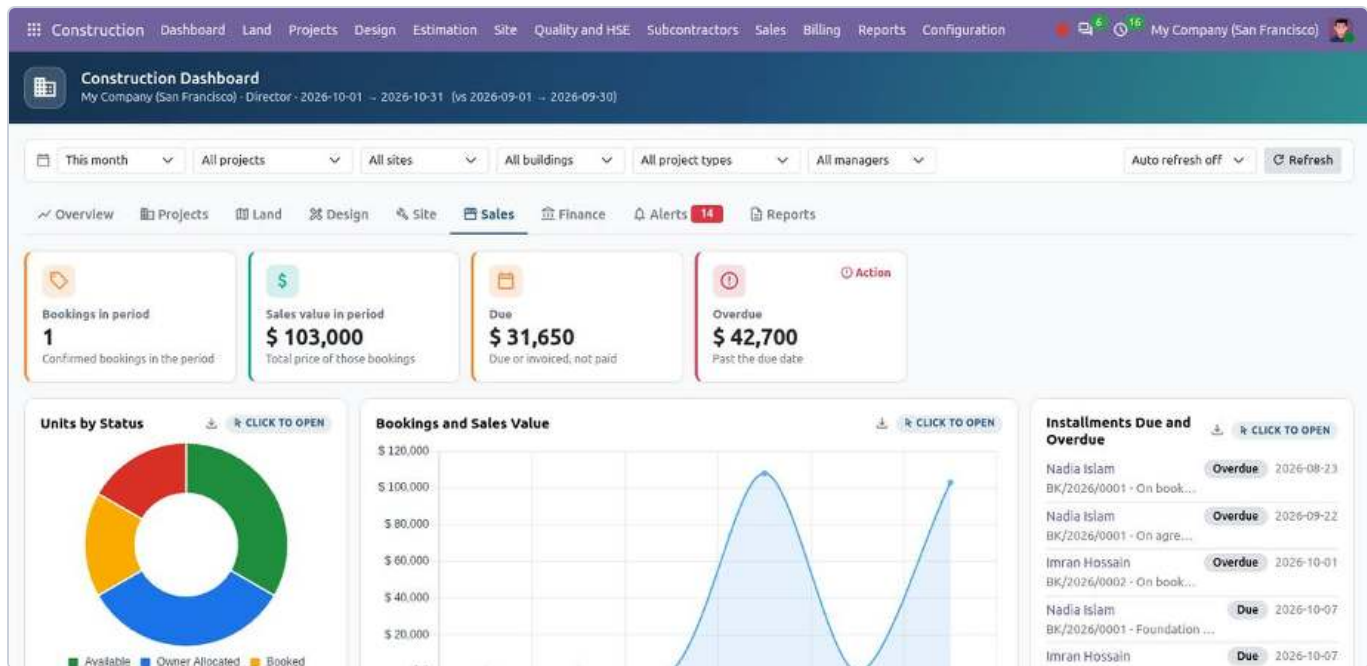


Figure 89. The Sales tab.

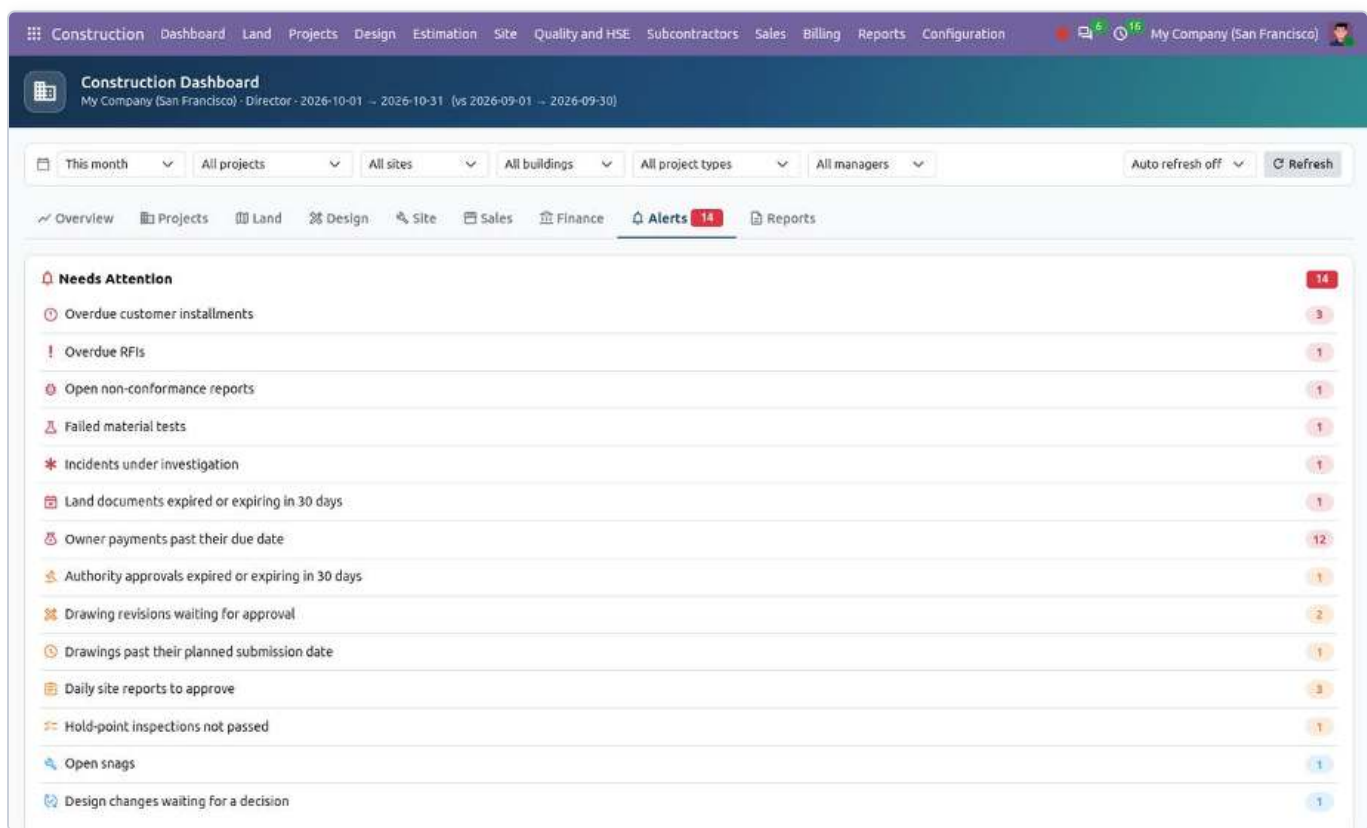


Figure 90. The Alerts tab: everything that needs attention, with a count. Click a line to open the records.

14.2 Dashboard reports

The tab **Reports** offers 29 reports in six groups. Each one has three buttons:

Button	Result
View	Shows the report on screen, with totals.
Excel	Downloads the report as an .xlsx file.
PDF	Downloads the report as a PDF in A4 landscape.

The screenshot displays the 'Construction Dashboard' for 'My Company (San Francisco)'. The dashboard is organized into sections based on project phases: PROJECTS, LAND, DESIGN, SITE, SALES, and FINANCE. Each section contains several report cards. Each card has a title, a brief description, and three buttons: 'View', 'Excel', and 'PDF'. The reports are as follows:

- PROJECTS**
 - Project Summary**: Progress, planned dates, contract value and risk per project.
 - Milestones**: Phase tasks with deadline, quantities and progress.
 - Authority Approvals**: Applications, approvals and expiry dates.
- LAND**
 - Land Register**: Parcels with area, status and owners.
 - Land Documents**: Documents with expiry and verification status.
 - Owner Payments**: Signing money, allowances and their payment status.
- DESIGN**
 - Drawing Register**: Drawings with revision, status and delays.
 - RFI Log**: Questions, due dates and answers.
 - Design Changes**: Change requests with cost and time impact.
- SITE**
 - Daily Site Reports**: Reports with weather, manpower and hours lost.
 - Delay Analysis**: Hours lost by project and cause.
 - Labour Attendance**: Days, hours and overtime per worker.
 - Labour Cost**: Wage sheets with days, overtime and amounts.
 - Equipment Usage**: Hours, fuel and cost per allocation.
 - Material Requisitions**: Requested items and their status.
 - Material Consumption**: Material issued and wasted per site.
 - NCR and Snag Log**: Non-conformances and snags with responsible and status.
 - Material Tests**: Samples, required and obtained values.
 - HSE Incidents**: Incidents and near misses with severity.
- SALES**
 - Unit Inventory**: Units with area, price, status and customer.
 - Booking Register**: Bookings with price, paid and balance.
 - Installment Ageing**: Unpaid installments with days overdue.
- FINANCE**
 - Budget vs Actual**: Budget, committed and actual cost per BOQ line.
 - Cost by Cost Head**: Budget and actual cost per project and cost head.
 - Cash Flow**: Expected inflows and outflows by month.
 - IPC Register**: Payment certificates with retention and net payable.
 - Variation Orders**: Variations with amount and time extension.
 - Retention**: Retention held, released and outstanding.
 - Subcontractor Ledger**: Measurements, retention and net amounts.

At the bottom, a note states: 'Reports follow the filters above. Documents such as the BOQ, IPC certificate or site report are in the Print menu of each record.'

Figure 91. The 29 reports of the dashboard.

Code	Project	Type	Manager	Planned Start	Planned End	Expected End	Planned (%)	Actual (%)	Contract Value	Cost Risk	Delay Risk
LVR	Lake View Residences	Own Development (JV)	Paul Manager	05/10/2026	08/03/2027	10/03/2027	33.6%	29.3%	\$ 1,850,000.00	0	40
Total									\$ 1,850,000.00		

Figure 92. A report opened with View.

NOTE Reports follow the filters at the top of the dashboard, and each role only sees the reports it is allowed to see.

14.3 The Reports menu

MENU Construction > Reports

Six Excel exports are one click away: Budget vs Actual, Material Consumption, Labour Cost, Subcontractor Ledger, Drawing Register and Cash Flow.

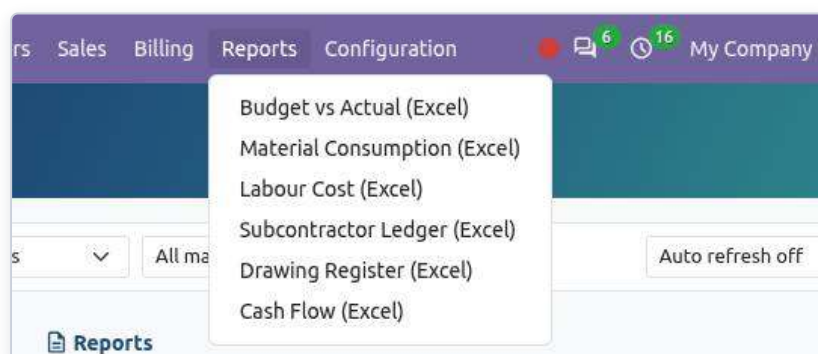


Figure 93. The Reports menu.

14.4 Printed documents

Formal documents are printed from the record itself: open the record, click the **gear icon** next to its name, then **Print**.

Open this record	Print gives
Land parcel	Land Register
JV contract	JV Contract Summary and Owner Statement
Project	Project Status Report, Final Account
Design brief	Design Brief
Drawing	Drawing Register
Transmittal	Transmittal Note
RFI	RFI Form

Open this record	Print gives
Design plan	Plan Print (A3 landscape)
BOQ	BOQ
Rate analysis	Rate Analysis
Daily site report	Daily Site Report
Inspection / NCR	Inspection Report / Non-Conformance Report
Incident / Work permit	Incident Report / Work Permit
Subcontract / Measurement	Subcontract Agreement / Measurement Sheet
Wage sheet	Wage Sheet
IPC / Variation	IPC Certificate / Variation Order
Booking	Allotment Letter, Sale Agreement, Customer Statement
Installment	Payment Receipt
Handover	Possession Letter

Allotment Letter

Date: 08/23/2026
Reference: BK/2026/0001

Nadia Islam

Dear Nadia Islam,

We are pleased to allot you unit **Tower A / A-1A** of the project **Lake View Residences**, with an area of 52.00, for a total price of **\$ 108,000.00**.

The price is payable according to the schedule below. This allotment remains valid as long as the installments are paid on their due dates.

Installment	Due	Amount
On booking	08/23/2026	\$ 10,800.00
On agreement	09/23/2026	\$ 21,600.00
Foundation complete	10/07/2026	\$ 16,200.00
Superstructure complete		\$ 27,000.00
Finishing complete		\$ 21,600.00
On handover		\$ 10,800.00

For the Developer

Customer

Figure 94. Example of a printed document: the Allotment Letter of a booking.

15 Portals for Customers and Partners

People outside the company can follow their own records on the website, without access to the back office.

15.1 Give portal access

- 1 Open the contact (customer, land owner, consultant or subcontractor) in the Contacts app.
- 2 Click the gear icon › **Grant portal access**, check the email and confirm. The person receives an invitation to set a password.

Portal users log in on the website and open **My account**. They see only the cards that concern them:

Card	For	What they can do
My Unit Bookings	Customers	See the booking, the price, the amount paid and the balance, the installment schedule, the construction progress and the 3D view of the building; follow the handover.
Support Tickets	Customers	Open an after-sales ticket and follow its status.
My Land Contracts	Land owners	See the JV contract, its payments and download its files.
Drawing Transmittals	Consultants, contractors	Download the drawings, comment on a revision and acknowledge receipt.
RFIs to Answer	Consultants	Read the question and type the answer.
Payment Certificates	Consultants	Review an IPC and certify it.
Subcontracts	Subcontractors	See their subcontract and its figures.

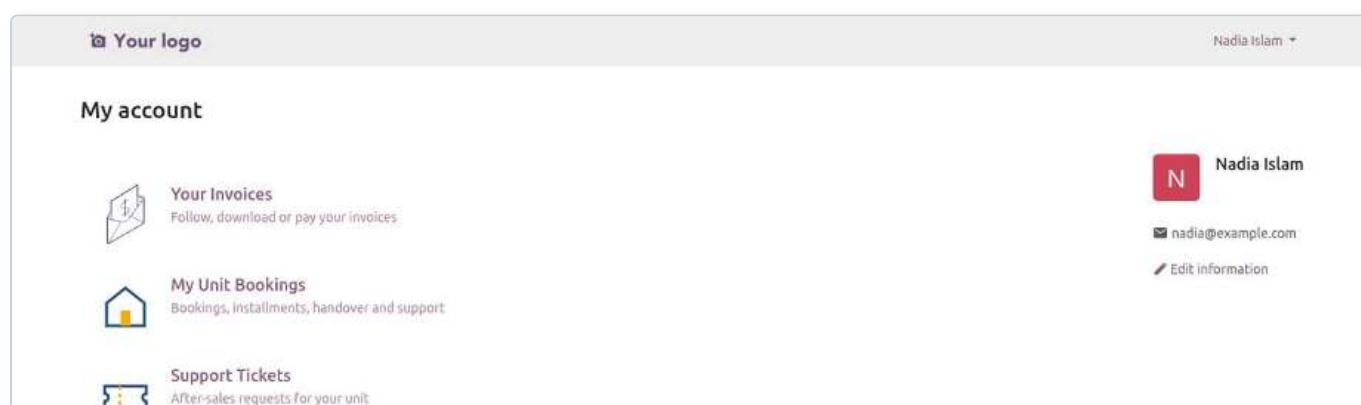


Figure 95. The portal home page of a customer.

Your logo

Nadia Islam

Projects

Lake View Residences

My Unit Bookings

BK/2026/0001

BK/2026/0001

Agreement Signed

Unit: Tower A / A-1A

Project: Lake View Residences

Booked on: 08/23/2026

Construction progress: 29.3%

Total price: \$ 108,000.00

Paid: \$ 0.00

Balance: \$ 108,000.00

Installments

Installment	Due	Amount	Paid Status
On booking	08/23/2026	\$ 10,800.00	\$ 0.00 Overdue
On agreement	09/22/2026	\$ 21,600.00	\$ 0.00 Overdue
Foundation complete	10/07/2026	\$ 16,200.00	\$ 0.00 Due
Superstructure complete	On milestone	\$ 27,000.00	\$ 0.00 Scheduled

Figure 96. A booking as the customer sees it.

15.2 A customer opens a support ticket

- On the booking page, click **Open a Support Ticket** (or open **Support Tickets** from My account).
- Choose the **Unit** and the **Category**, type the **Subject** and the **Description**.
- Click **Submit**. The ticket appears in **Construction > Sales > After-Sales Tickets**.

Your logo

Nadia Islam

Support Tickets

New Support Ticket

Unit

Tower A / A-1A

Category

Plumbing

Subject

Description

Figure 97. The support ticket form on the portal.

16.1 What the system does by itself

Twelve scheduled actions run in the background. You do not start them; an administrator can see them in [Settings > Technical > Scheduled Actions](#) (developer mode).

Scheduled action	Effect
Land document expiry reminders	Creates an activity for the land officer before a document expires.
Authority approval expiries	Warns before an authority approval expires.
Installments due, overdue and milestones	Updates installment statuses, sends reminders, applies the late penalty.
Overdue RFIs	Creates a reminder activity for each RFI past its due date.
Missing daily site reports	Reminds the site in-charge when the day before has no report.
Owner allowance lines and bills	Creates the monthly allowance of active JV contracts and its vendor bill.
Recompute risk scores	Refreshes the cost and delay risk of every project.
Budget variance alerts	Alerts the project manager when a BOQ line passes the budget threshold.
Nightly 3D progress snapshot	Stores the day's 3D progress for the progress replay.
AI log retention	Deletes old AI output.
Convert CAD drawings	Converts uploaded DWG files for the CAD viewer.
AI task queue	Runs AI tasks asked in the background.

16.2 A daily routine for each role

Role	Every day
Site Engineer	Labour attendance in the morning; inspections and snags during the day; the daily site report before leaving.
Project Manager	Dashboard > Alerts and My Pending Approvals; approve site reports, requisitions, drawings and measurements.
Architect / Designer	Answer open RFIs; upload and review revisions; issue transmittals.
Procurement / Store	Approved requisitions: create RFQs or transfers; mark receipts; record consumption.
HR / Labour Officer	Check attendance; at the end of the period, compute and submit the wage sheets.
Sales	Enquiries and opportunities; bookings; overdue installments; handovers to schedule.
Accountant	Invoice due installments; bill owner payments, wage sheets and measurements; IPC invoices.

Role	Every day
Land / Legal Officer	Expiring documents; contracts in legal review; owner payments past their date.
Director	Dashboard overview and risks; discount and handover overrides.

16.3 Common messages and what to do

Message	What to do
The design stage of ... opens once its design brief is approved.	Approve the design brief of the project, or untick Design Brief Before Drawings in the settings.
... already has a revision under review or approved.	Finish the review of the current revision (issue or reject it) before uploading a new one.
The ownership shares of ... total ...%, they must total 100%.	Correct the Share (%) of the owners on the land.
The due-diligence checklist still has open items or issues.	Give a result to every checklist line of the land and solve the issues.
The land ... must be verified before the contract is signed.	Verify the land parcel first.
Unit ... is not available.	The unit is booked, sold or allocated. Choose another unit.
The handover is blocked: ...	Close the open snags and collect the unpaid installments, or ask a Director to override with a reason.
An approved daily site report is locked.	Ask the project manager to click Unlock .
Work cannot be reported on ...: a hold-point inspection ... has not passed.	Complete and pass the hold-point inspection first.
The project has no approved BOQ.	Approve a BOQ for the project before generating an IPC.
Set a site warehouse on ... first.	Open the site and click Create Site Warehouse .
You can only approve documents of projects you are assigned to.	Ask to be added to the project team, or let the project manager approve.
No AI provider is configured.	Add one in Construction > Configuration > AI Providers , or ignore the AI buttons.
AI features are switched off in the Construction settings.	Tick AI Features in the settings.

16.4 Assumptions made in this manual

- Odoo Community, running `easy_construction_firm` version 20.0.1.0.0, in English. The module is also translated into Bangla, Chinese, Arabic, French, German and Spanish; in those languages the labels differ but the positions do not.
- Screenshots show the demonstration data, logged in as an administrator with the Director role. Other roles see fewer menus and buttons.

- Screens of other Odoo apps the module relies on (vendor bills, customer invoices and payments, purchase orders, stock transfers, CRM, contacts) are standard Odoo and are not explained here.
- The wage sheet figure shows a draft sheet without lines, and the partner portals other than the customer's are described from their pages without a screenshot, because the demonstration data has no such records.
- AI features need a provider account of your own and are optional. Every AI result is a suggestion to review.