

Data Migration from OpenERP7 to Odoo 10

So basically we need to write a document for migrating data from OpenERP 7 to Odoo 10.

- A). Accounting data
- B). Stock level data
- C). Customer ledgers

Solutions: We will follow the below steps for data migration.

Basic Records:

1. Companies
2. Odoo Users
3. Languages
4. Incoming Mail Servers and Outgoing Mail Servers

A. Accounting Data includes below data:

1. Taxes
2. Chart of Accounts
3. Customers And Suppliers
 - a. Country
 - b. State
 - c. District
 - d. Tehsil
 - e. Village
 - f. Partner Tags : Contact Tags [res.partner.category]
 - g. Contact Titles : Contact Titles [res.partner.title]
 - h. Salesperson [res.users]
 - i. Sale Price List
 - j. Warehouse : Customer Location And Vendor Location.[stock.location]
 - k. Customer Payment Term AND Vendor Payment Term
 - l. Fiscal Position
 - m. Account Receivable And Account Payable
 - n. Banks Informations
 - o. Customers And Supplier SELF
4. Customer-Invoices
 - a. Customer Invoices
 - b. Customer Refunds
 - c. Sales Receipts
 - d. Customer Payments
5. Supplier Invoices
 - a. Supplier Invoices
 - b. Supplier Refunds

- c. Purchase Receipts
- d. Supplier Payments

6. Journals

- a. Journals
- b. Journal Entries
- c. Journal Vouchers

B. Stock level data

Product is the center of Stock level data. So we need to first migrate Product data. Below is the child data that is generally used in Product.

1. Products

- a. Product Categories
- b. Unit of Measure Categories
- c. Unit of Measure
- d. Assigned Suppliers
- e. Locations
- f. Accounts
- g. Sale
- h. Purchase

Once this child data is migrated to Odoo 10, then only Products can be migrated. Based on Sales and Purchase data, User can see Stock level data.

C. Customer ledgers

Customer ledgers will be created only if Accounting data imported.

Note : Customer ledgers Report will be printed from the following **Path** : Accounting/Reports/Partner Ledger.

How to migrate data from V7 to V10 ?

Step 1:

We will export data for above 3 points in csv or excel files manually i.e. export-function of Openerp which is the default method OR we will be developing a module to export records for each Table(Object).

Step 2 : We can directly import some tables to Odoo10 but for the other tables we will develop a python script which will read data from .csv file and create a Table(Object) in Odoo10 for each. Sometimes it also depends on the size of records.

Example : Customer

So first we will migrate its related tables ex.(state, country, users, pricelist, warehouse location, Payment Terms, Partner Tags, etc.)

Once related table's records are created in the database, after that Customer records can be migrated(created).

Technical Guideline :

1)Companies

Add Company information with this path : Setting/Users/Companies.

Assuming that there are not many companies in the database So we can create the companies manually.

2)ODOO USERS

Refer Video link :

<https://drive.google.com/open?id=1FTKKqnn3o5O5prHgve-sdrajyxzqPjxj>

Export from OpenERP 7.

User can export users records with this menu **Path : Setting/Users/Users.**

(1) Click on List View. Select the records and click **Export** from **More button** and a pop up will appear

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select fields from Available fields...

(A) Name

Select "Name" and Click on "**Add**" button. Name field will be displayed on the right-hand-side box. Now Select all below fields one by one.

(B)Login

(C>Password

(D)Language

(E)Timezone

(F)Home Action

(G)Receive Messages by Email

(H)Email : hidden in V10.

(I)Signature

(J)Company

(K)Companies

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_res_users.xls**]

https://drive.google.com/open?id=1mHINYBbcmK3fKJqRvtt5KQC1B-k-x_Ej

Import in Odoo10

Open the downloaded file(res.users.xls).

1)Remove "External ID" column.

2)Columns Name Must be same as of Odoo10's field. Set the appropriate sting.

Change below Column Names

Login **To** login

Home Action/Name **To** Home Action

Receive Messages by Email **To** Email Messages and Notifications

In V7, options are Never, Incoming Emails only, Incoming Emails only and Discussions, All Messages but in V10 there are only two options are Never, Always. So we need to set values while importing Users.

We will set values against like

Never = Never

Incoming Emails only = Always

Incoming Emails only and Discussions = Always

All Messages = Always.

Company/Company Name **To** Company

Companies/Company Name **To** Companies

3) Save the File.

Demo of saved file. **Import_res_users.xls**

https://drive.google.com/open?id=1_2Pj1j-ReTo26GFrMdoOOtIQd8qN6ozS

Note : Import file must not have any Blank Rows between available records rows.

4)Go to Path : Setting/Users/Users.

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, please click on "**Import**" button. Records will be created in the database

Note : Admin can set Access Rights according to User.

3)Languages

Add language from Menu Path : Setting/ Translations/Languages

4)Incoming Mail Servers and Outgoing Mail Servers

User can manually add Mail servers from

Menu path : Setting/ Technical/ Email/ Incoming Mail Server

Menu path : Setting/ Technical/ Email/ Outgoing Mail Servers

A. Accounting Data

1)Taxes

Export from OpenERP 7.

Export Taxes records with this menu **Path :Accounting/Configuration/Taxes/Taxes.**

(1) Click on List View. Select the records and click **Export** from **More button** and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select fields from Available fields...

(A)Tax Name

(B)Tax Code

- (C)Tax Application
- (D)Company
- (E)Tax Type
- (F)Amount
- (G)Tax Included in Price
- (H)Included in base amount
- (I)Invoice Tax Account
- (J)Refund Tax Account

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_account_tax.xls**]

https://drive.google.com/open?id=1Zq_6gHdyfaizwqfi7KPQ06Tz6i_P1-BA

Import in Odoo10

Open the downloaded file..

1)Remove "External ID" column.

2)Columns Name Must be same as of Odoo10's fields. Set the appropriate sting.

Change below Column Names

Tax Application **To** Tax Scope

Company/Company Name **To** Company

Tax Type **To** Tax Computation

Tax Included in Price **To** Included in Price

Included in base amount **To** Affect Base of Subsequent Taxes

Invoice Tax Account/Name **To** Tax Account

Refund Tax Account/Name **To** Tax Account on Refunds

Change the **Tax Scope** column Values:

Purchase **To** Purchases

Sale **To** Sales

Change the **Tax Computation** column Values:

Percentage **To** Percentage of Price

Fixed Amount **To** Fixed

3) Save the File.

Demo of saved file. **import_account_tax.xls**

<https://drive.google.com/open?id=1r3Tfx04tabs2uv1eSk5KY-f7w0gTkBRI>

Note : Import file must not have any Blank Rows between available records rows.

4)Go to Path : **Accounting/Accounting/Taxes..**

Click on "**Import**" button and Load the file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

2) Chart of Accounts

Export from OpenERP 7.

Export Account records with this menu

Path :Accounting/Configuration/Accounts/Accounts.

(1) Click on List View. Select the records and click **Export** from **More button** and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select fields from Available fields...

(A)Code

(B)Name

(C)Company

(D)Default Taxes

(E)Allow Reconciliation

(F)Secondary Currency

(G)Internal Notes

(H)Account Type

(4) Click on "**Export to File**" button.

Now record are exported..

Demo of downloaded file. [**export_account_account.xls**]

https://drive.google.com/open?id=1Dc0DkZQqcPgBulc3Lys0x2TBkD_4S7Ot

Import in Odoo10

Open the downloaded file..

1)Remove "External ID" column.

2)Columns Name Must be same as of Odoo10's field. Set the appropriate sting.

*Change the below Column Names

Company/Company Name **To** Company

Default Taxes/Tax Name **To** Default Taxes

Secondary Currency/Currency **To** Account Currency

Account Type **To** Type

*Change the below column's Values.

Default Taxes column, It can be assigned to many taxes here. So in this case, default odoo export function puts taxes in multiple rows. So we need to manage/Set this taxes in one cell separated by **comma**. Refer import_account_tax.xls file.

Type Column: user must add a value manually from below list.

Receivable

Payable

Bank and Cash

Credit Card

Current Assets

Non-current Assets

Prepayments

Fixed Assets
Current Liabilities
Non-current Liabilities
Equity
Current Year Earnings
Other Income
Income
Depreciation
Expenses
Cost of Revenue

Note : **Account Type** is used for information purpose, to generate country-specific legal reports, and set the rules to close a fiscal year and generate opening entries.

3) Save the File.

Demo of saved file. **Import_account_account.xls**

<https://drive.google.com/open?id=1op7mAAAd-VRI078cQ2rDaAx67x1dNaHwg>

Note : Import file must not have any Blank Rows between available records rows.

4)Go to Path : Accounting/Adviser/Chart of Accounts.

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

3) CUSTOMERS AND SUPPLIERS:

A) Countries

Export from OpenERP 7.

Export Countries records with this menu

Path :Sales/Configuration/Contacts/Localization/Countries.

(1) Click on List View. Select the records and click **Export** from **More button** and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select fields from Available fields...

(A)Country Name

(B)Country Code

(C)Currency

(D)Address Format

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**Export_country.xls**]

<https://drive.google.com/open?id=1UVMnksMAxCFVXXIB5WB51P6Fj1br0F6O>

Import in Odoo10

Open the downloaded file..

- 1) Remove "External ID" column.
- 2) Columns Name Must be same as Odoo10's fields. Set the strings appropriate.
Change below Columns Name
Currency/Currency **To** Currency

- 3) Save the File.

Demo of saved file. **import_country.xls**

https://drive.google.com/open?id=1914OXSUXAq4la5GaPRmboMmNj-_jpDjT

Note : Import file must not have any Blank Rows between available records rows.

- 4) Go to Path : **Sales/Configuration/Contacts/Localization/Countries**

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

B) States

Export from OpenERP 7.

Export states records with this menu

Path :Sales/Configuration/Contacts/Localization/Fed. States.

- (1) Click on List View. Select the records and click **Export** from **More button** and a pop up will appear.
- (2) Set **Export Type** = Export all Data.
Export Formats = Excel(or CSV).
- (3) Select fields from Available fields...
(A) State Name
(B) State Code
(C) Country

- (4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_states.xls**]

https://drive.google.com/open?id=1XtDn3Ua_GaSttQ71_xQ5JsuzuZDMrFqE

Import in Odoo10

Open the downloaded file..

- 1) Remove "External ID" column.
- 2) Columns Name Must be same as Odoo10's field. Set the appropriate sting.
Change below Columns Name
Country/Country Name **To** Country

- 3) Save the File.

Demo of saved file. **import_states.xls**

<https://drive.google.com/open?id=16H9p6mGx6RAmTI9Er6NGnGifM72KSMBw>

Note : Import file must not have any Blank Rows between available records rows.

- 4) Go to Path : **Sales/Configuration/Contacts/Localization/Fed. States**

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

C) District :

IN V7, There are no records of Districts but in V10, a menu is available for Districts.

So We can a make a .csv or .xls file. User has to add records manually in a file.

Demo file : **import_districts.xls**

https://drive.google.com/open?id=1-SjGXVsa48it5uPVXy_XMy32W4K_E9XR

Explanation : 3 columns added in import_districts.xls

Name : Name of District.

State: Name of State. State must be available in the database so you can use the state name here.

Country : Name Of Country. Country must be available in database so you can use state name here.

Go to Path : Sales/Configuration/Contacts/Localization/Districts

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

D) Tehsil

Make a .csv or .xls file. User has to manually add the records in a file.

Demo file : import_tehsils.xls

https://drive.google.com/open?id=1Br0XRgllidEnYNKk8Yr_XMM3KfPe4Tstz

Explanation :

Name : Name of Tehsils.

District : District must be available in the database so you can use state name here.

State

Country

Go to Path : Sales/Configuration/Contacts/Localization/Tehsils

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

E) Village

Export from OpenERP 7.

Export Village records with this menu **Path : Sales/Sales/Customers**

Now Remove "Customers" filter from Search bar.

(1) Click on List View. Select the records and click Export from More button and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select a field from Available fields...

(A)village

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_village.xls**]

<https://drive.google.com/open?id=1Od2ExJ5T0uknaHLUZTVV-Ee8J3DIJOfg>

Import in Odoo10

Open the downloaded file..

1) Remove "External ID" column.

2) Columns Name Must be same as Odoo10's fields. Set the appropriate string.

* Change name of below column

Village **To** Name

* Add below Columns

Tehsil

District

State

Country

3) Save the File.

Demo of saved file. **import_village.xls**

<https://drive.google.com/open?id=1JnFEqVMtURyRA6k-wMK6squY9Pg7dYsf>

Note : Import file must not have any Blank Rows between available records rows.

4) Go to Path : **Sales/Configuration/Contacts/Localization/Village**

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

F) Partner Tags

Export from OpenERP 7.

Export Partner Tags records with this menu **Path : Sales/Configuration/Address Book/Partner Tags**

Note : First Import contact tags which are assigned as parent category.

(1) Click on List View. Select the records and click Export from More button and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3) Select a field from Available fields...

(A) Category Name

(B) Active

(C) Parent Category

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_partner_category.xls**]

<https://drive.google.com/open?id=16Yo3IXC26vJnig2EnqeL7NnGP4I6U8J3>

Import in Odoo10

Open the downloaded file..

1) Remove "External ID" column.

2) Columns Name Must be same as Odoo10's field. Set the appropriate sting.

* Change name of below column

Category Name **To** Tag Name

Parent Category/Category Name **To Parent Category**

3) Save the File.

Demo of saved file. **Import_partner_category.xls**

https://drive.google.com/open?id=1_OSuiNx5L5Blm-oxqZWzWrHPT-3QN4wO

Note : Import file must not have any Blank Rows between available records rows.

4) Go to Path : **Sales/Configuration/Contacts/Contag Tags**

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

G) Contact Titles

Export from OpenERP 7.

Export Partner Tags records with this menu **Path : Sales/Configuration/Address Book/Contact Titles**

(1) Click on List View. Select the records and click Export from More button and a pop up will appear.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3) Select a field from Available fields...

(A) Category Name

(B) Active

(C) Parent Category

(4) Click on "**Export to File**" button.

Now records are exported..

Demo of downloaded file. [**export_partner_title.xls**]

<https://drive.google.com/open?id=1NfOiXWPMYJhVQ-FTfMO7-pYszd3QVwDg>

Import in Odoo10

Open the downloaded file..

1) Remove "External ID" column.

2) Columns Name Must be same as Odoo10's field. Set the appropriate sting.

3) Save the File.

Demo of saved file. **import_partner_title.xls**

<https://drive.google.com/open?id=1Ee-zeeE8ZQZ5ecKmW18ZRUXJbjfgbUx>

Note : Import file must not have any Blank Rows between available records rows.

4) Go to Path : **Sales/Configuration/Contacts/Contag Titles**

Click on "**Import**" button and Load file. Click on "**Validate**" Button. If there is no error while Validating, Please click on "**Import**" button. Records will be created in the database.

H)Salesperson

Please refer 2)ODOO USERS Point.

I)Sale PriceList

User need to manually create sale Pricelist because the structure is changed from V7 to V10.

J)Warehouse : Customer Location And Vendor Location

Export from OpenERP 7.

Path : Warehouse/Configuration/Locations

Export the following fields : -

- Location Name
- Parent Location
- Location Type
- Location Address
- Company
- Scrap Location
- Corridor (X)
- Shelves (Y)
- Height (Z)
- Additional Information [comment]

Demo of downloaded file. [**export_stock_location.xls**]

<https://drive.google.com/open?id=18TlvcrG02oPLGS6THR3XJbXiA3DgrD-w>

Import in Odoo10

Note : First Import Location which is assigned as parent category to any location.

* Change below Column Names

Parent Location/Location Name **To** Location Name

Company/Company Name **To** Company

Scrap Location **To** Is a Scrap Location ?

* IF customer/Vendor is **not available** then remove **Location Address/Name** column.

* If customer/Vendor **is available**, change column name **Location Address/Name**

To Owner

Demo of saved file. [**import_stock_location.xls**]

https://drive.google.com/open?id=1d_wzhCx1XF0NIFYuzStCT6tl1CFDTPoX

Import file from Inventory/Configuration/Warehouse Management/Locations

K)Customer Payment Term AND Vendor Payment Term

Export from OpenERP 7.

Path : Accounting / Miscellaneous / Payment Terms

Export below fields.

- Payment Term
- Active
- Description
- Terms/Computation

Terms/Number of Days

Terms/Amount To Pay

Note : Terms/Day of the Month : Not included in the export field because in V10, it's Data type is changed to Selection.

Refer screenshot while exporting fields in Export Pop Up.

<https://drive.google.com/open?id=13De3vRtINUvchD0oGgHjUno3Zk6DGQCH>

Demo of downloaded file. [**export_payment.term.xls**]

<https://drive.google.com/open?id=1XOLpuBKKQesY4bV--hF0T5nUgmXYPZ9->

Import in Odoo10

* Change below Columns Name

Payment Term **To** Payment Terms

Description **To** Description on the Invoice

Terms/Computation **To** Terms/Type

Terms/Amount To Pay **To** Terms/value_amount

Demo of saved file. [**import_payment.term.xls**]

https://drive.google.com/open?id=1pwF5lioGmtC_upEHuHwO9v3PKrSA_LkH

Import file from Accounting / Configuration / Management / Payment Terms.

Note : There is **types** in Payment Terms where many terms User can add. Now in Term, Need to configure manually **Due Date Computation** block's Selection.

Please refer screenshot.

<https://drive.google.com/open?id=1WEJt6mSgDtyTmnqTaGMlcYfM3j601ikp>

L)Fiscal Position

Export from OpenERP 7.

Path : Accounting / configuration / Taxes / Fiscal Positions

Export below fields.

Fiscal Position

Company

Notes

Tax Mapping / Tax Source

Tax Mapping / Replacement Tax

Account Mapping / Account Source

Account Mapping / Account Destination

Demo of downloaded file. [**export_account_fiscal_position.xls**]

https://drive.google.com/open?id=1Zg2RHcXYcj9P_nFv8gppXaruRRcuzY-T

Import in Odoo10

* Change below Columns Name

Company/Company Name **To** Company

Tax Mapping/Tax Source/Tax Name **To** Tax Mapping/tax_src_id

Tax Mapping/Replacement Tax/Tax Name **To** Tax Mapping/tax_dest_id

Account Mapping/Account Source/Name **To** Account Mapping/account_src_id

Account Mapping/Account Destination **To** Account Mapping/account_dest_id

Demo of saved file. [[import_account_fiscal_position.xls](#)]

<https://drive.google.com/open?id=1Hz7oDsymVReOJnrwt1mWkbYEhJ3pZ-NL>

Import file from Accounting / Configuration / Accounting / Fiscal Positions

M)Account Receivable And Account Payable

Accounts import and Export complete in point (6)**Chart of Accounts**. So No need to do anything for Account Receivable And Account Payable.

N)Banks Informations

Bank information will import Once Customer/Supplier records imported.

1. Banks

Export from OpenERP 7.

Path : Sales / Configuration / Address Book / Banks

Export below fields.

Name
Bank Identifier Code
Street
Street2
Zip
City
Fed.State
Country
Phone
Fax
Email

Demo of downloaded file. [[export_bank.xls](#)]

<https://drive.google.com/open?id=1FcNCBs62l1Va4P8PKwf0sv10Xza50WHg>

Import in Odoo10

* Change below Columns Name

Fed. State/State Name **To** Fed. State

Country/Country Name **To** Country

Demo of saved file. [[import_bank.xls](#)]

https://drive.google.com/open?id=1BeF0N9vC_QnAJSN-S0iN687meKkymZM6

Import file from Sales / Configuration / Banks Account / Banks

2. Banks Accounts

Export from OpenERP 7.

Path : Sales / Configuration / Address Book / Bank Accounts

Export below fields.

Account Number
Account Owner/Name
Bank/Name

Demo of downloaded file. [[export_bank.xls](#)]

https://drive.google.com/open?id=1TZoYR4NzOQVnSXy_ASjaxB4dgelSjlc-

Import in Odoo10

* Change below Columns Name

Account Owner/Name **To** Account Holder

Bank/Name **To** Bank

Demo of saved file. [[import_bank.xls](#)]

<https://drive.google.com/open?id=1Ec4unqiS657Z8NpbPqxEaaAShk8Pppw6>

Import file from Sales / Configuration / Banks Account / Banks

Technical Help:

Bank Account Type : Not in V10.

O)Customers And Suppliers

Export from OpenERP 7

Install v7_ref_ids module in Odoo10. This module keep track of V7's records ref ids. It will help to

Track records V7 id. It will may be use while updation any record.

Module Link : <https://drive.google.com/open?id=1Fz-G2sLXA844Z5JYg4KaGZZEMC8Tr5dO>

(1) Click on List View. Select the records and click **Export** from **More button** and a pop up will be Open.

(2) Set **Export Type** = Export all Data.

Export Formats = Excel(or CSV).

(3)Select fields from Available fields...

ID

Name

Is a Company

Related Company/ID : Technical field for developers

Related Company

Tags

Street

Street2

City

State

Zip

Country

Website

Job Position

Phone

Mobile

Fax
Email
Title
Notes
Salesperson
Company
Reference
Language
Date
Customer
Supplier
Active
Receive Messages by Email
Opt-Out
Sale Pricelist
Purchase Pricelist
* **Customer Location**
* **Supplier Location**
Fiscal Position
Account Receivable
Account Payable
Customer Payment Term
Supplier Payment Term
Credit Limit

(4) Click on "**Export to File**" button.

Now record is exported..

Demo of downloaded file. [**export_res_partner.xls**]

https://drive.google.com/open?id=1oa7NO2qDi041huJdra9_I4t8jWkVRrOn

Import in Odoo10

Open the Downloaded file..

1) Remove "External ID" column.

2) Columns Name Must be same String of Odoo10's field. Set the appropriate sting.

* **Remove** below Columns

Purchase Pricelist/Pricelist Name column

Related Company/ID Column

Related Company

* **Change** below Columns Name

ID **To** V7 ID

Is a Company **To** company_type:

IF **Is a Company's** Value is **True**, then Set **Company**

IF **Is a Company's** Value is **False**, then Set **Individual**

Tags/Category Name **To** Tags

Tags column, It can be assigned many tags here. So in this case, default odoo export function place tag in next row in Tags Columns. So We need to manage/Set this tags in one cell with separated by

comma.

State/State Name **To** State
Country/Country Name **To** Country
Title/Title **To** Title
Salesperson/Name **To** Salesperson
Company/Company Name **To** Company
Reference **To** Internal Reference
Customer **To** Is a Customer
Supplier **To** Is a Vendor

Receive Messages by Email **To** **Email Messages and Notifications**

This field is a selection field. In V7, its options are Never, Incoming Emails Only, Incoming Emails only and Discussions, All Messages but in V10 there are only two options like Never, Always. Need to set values while importing Users.

We will set values against like

Never = Never
Incoming Emails only = Always
Incoming Emails only and Discussions = Always
All Messages = Always.

Opt-Out **To** opt_out
Sale Pricelist/Pricelist Name **To** Sale Pricelist
Customer Location/Location Name **To** Customer Location
Supplier Location/Location Name **To** Vendor Location
Fiscal Position/Fiscal Position **To** Fiscal Position
Account Receivable/Name **To** Account Receivable
Account Payable/Name **To** Account Payable
Customer Payment Term/Payment Term **To** Customer Payment Terms
Supplier Payment Term/Payment Term **To** Vendor Payment Terms

3) Save the File.

Demo of saved file. [**import_res_partner.xls**]

https://drive.google.com/open?id=1oq8am_la9eCLyVUKP1coP4765ERm9nK8

Note : Import file must not have any Blank Row between available records rows.

Now we need to map **Contacts** of Customer Or Suppliers.

We made a Python Script.

Create a new **contacts.xls** file.

Add below columns from [**export_res_partner.xls**]

ID
Name
Related Company/ID
Related Company/Name

Demo of contacts.xls file

<https://drive.google.com/open?id=1kNHE6m0IIKyGnn9B45pz-oSfQmg6KUPo>

Change the detail of **map_contacts.py** and Run the script.

<https://drive.google.com/open?id=1PaarreZZTGpnjKRYC3omlqtlaBlw892t>

11)Products :

A) Product Categories

Export from OpenERP 7.

Path : Sales / Configuration / Products / Product Categories

Export below fields.

Name
Parent Category
Category Type
Income Account
Expense Account
Stock Input Account
Stock Output Account
Stock Valuation Account

Demo of downloaded file. [**export_product_category.xls**]

https://drive.google.com/open?id=1SGMz7S7QpT814TkLvVJNMjJukSBDj_12

Import in Odoo10

* Change below Columns Name

Parent Category/Name **To** Parent Category
Income Account/Name **To** Income Account
Expense Account/Name **To** Expense Account
Stock Input Account/Name **To** Stock Input Account
Stock Output Account/Name **To** Stock Output Account
Stock Valuation Account/Name **To** Stock Valuation Account

Demo of saved file. [**import_product_category.xls**]

<https://drive.google.com/open?id=1yn3Gf7b-jcvuRyenhwrSN37GTu9OvLKN>

Import file from Path : Sales / Configuration / Products / Product Categories

Note : You can assign Stock Journal manually.

B) Unit of Measure Categories

Export from OpenERP 7.

Path : Sales / Configuration / Unit of Measure Categories

Export below fields.

ID
Name

Demo of downloaded file. [**export_product_uom_categ.xls**]

https://drive.google.com/open?id=1ZYIbK_3O1RVO5wGzjzWvFgkIIWh9Feho

Import in Odoo10

* Remove **ID** Column

Demo of saved file. [**import_product_uom_categ.xls**]

<https://drive.google.com/open?id=1NCP4zb72hvLrZhKf9FDxkTBMWYRTankq>

Import file from Path : Sales / Configuration / Products / Unit of Measure Categories

C) Unit of Measure

Export from OpenERP 7.

Path : Sales / Configuration / Unit of Measure

Export below fields.

ID

Unit of Measure

Category/Name

Type

Ratio

Rounding Precision

Demo of downloaded file. [export_product_uom.xls]

https://drive.google.com/open?id=1WvMeF8KtiJ6sEAdPGiXdb6O_P9YfkEre

Import in Odoo10

* Remove ID Column

* Change below columns

Category/Name To Category

Demo of saved file. [import_product_uom.xls]

<https://drive.google.com/open?id=1sEqkDxxRVWXSOMQvAPZt2ReM4wibldAa>

Import file from Path : Sales / Configuration / Products / Unit of Measure

SELF

Module Name : export_records

Please install in Openerp7.

export_records module helps to export **product records** from Openerp 7.

Module Link:

<https://drive.google.com/open?id=1BQFoi3Inqrgkz6hqbFUtqjC5wA3k7dst>

Please refer this video for Export Products

https://drive.google.com/open?id=1_q4OfKrrUgFpju9NkVD1nkg828LCowVV

Import Product records with Python Script in Odoo 10.

We exported data with export_records module. We have now **product.xls** file.

Demo of product.xls file here:

<https://drive.google.com/open?id=1Qk8giKSG9CkWXN65ScASO9LrYnKN8tBY>

Run this Script for import product records

File name : product_create.py

https://drive.google.com/open?id=1_shE56YSjnbAF7HN3ZPS3al8i2Gp6ORV

C. Customer ledgers

Export from OpnERP7.

Total receivable and Total Payable amount.

To export receivable and Total Payable amount of customers, Updated **export_records** module.

User can download records from **Sales > Export Records > Partner Receivable And Payable**

File will be downloaded : **partner_receivable_payable_amount.xls**

Demo of downloaded File :

https://drive.google.com/open?id=1C3ij0vJr-X_T_tOL9nWgsBsfl-MRE-CR

Import receivable and Payable amount of customers/Vendors

Developed **module** : import_records

Install this module in Odoo10.

Module link : <https://drive.google.com/open?id=1d2Petobro8zftR48Ub-6711n5YZzriX->

How to use this module ?

Please refer this video link :

https://drive.google.com/open?id=1oKyG96fAZzOzWhJ3qNqentXAKXFRuGY_

This module create two journal entries in Posted status. First for Receivable amount and second for Payable amount.

Path: Sales > Import Records > Partner Receivable and Payable.

Wizard will open. Fill all inputs here.

Wizard Explanation

Total Receivable block:

Below two inputs necessary for set receivable amount.

Journal for Total Receivable : Select a journal. Ex.Customer Invoices

Income Account : Select a account for credit amount which reflect in customer's Total Receivable amount. Ex 200110 Local Sales

Total Payable

Below two inputs necessary for set Payable amount.

Journal for Total Payable: Select a Journal. Ex. Vendor Bills

Expense Account : Select a account for debit amount which reflect in customer's Total Payable amount. Purchase Expense

Upload Xls File : Attach file partner_receivable_payable_amount.xls

Click on **Confirm** button. Customer's payable and receivable amount will be Set.