

User Manual

Odoo - OneDrive Integration Plugin for Odoo v18.0



Table of Contents

| 1. | Introduction | 3 |
|----|---|----|
| 2. | Features | |
| 3. | Configurations | 4 |
| : | 3.1 App Registration in Microsoft Azure | 4 |
| : | 3.2 Odoo Backend Configuration | 8 |
| : | 3.3 Kanban View for One Drive Attachments | |
| 4. | Brief Description | 15 |
| 5. | Technical Requirements / Compatible With: | |
| 6. | Change Log / Release Notes | 16 |
| 7. | Support | |

1. Introduction

Odoo OneDrive Integration provides a seamless solution for automatically storing Odoo attachments directly in OneDrive, ensuring easy access and enhanced data management. With this integration, you can securely share your Odoo-stored data with external parties via OneDrive, offering full control over document updates, deletions, and the ability to stop sharing at any time. This plugin simplifies document handling and improves collaboration while maintaining the security and integrity of your data.

2. Features

The Odoo OneDrive Integration module offers a wide range of features designed to enhance your document management experience. Key features include:

- Easy Installation: Simple and quick to set up within your Odoo environment.
- Flexibility: Adaptable to various business needs with configurable options.
- User-Friendly Interface: Intuitive and customizable to meet individual user requirements.
- Model and MIME Type Selection: Choose specific models and file types for document uploads.
- Enhanced Security: Ensures complete data security while maintaining accessibility.
- Secure OneDrive Environment: Microsoft OneDrive provides a highly secure space for storing and managing files.
- Effortless File Sharing: Share large files easily and securely without complications.



- Efficient File Management: Seamlessly manage, share, and organize files in OneDrive.
- **Stop Sharing Functionality**: Ability to stop sharing files at any point to maintain control over access.
- File Deletion: Easily delete files directly from OneDrive.
- Update Files: Make changes and update files while keeping them in sync with your OneDrive storage.

3. Configurations

Install the Odoo – OneDrive Integration module:

- Go to *Apps* -> Search for OneDrive
- Click *Activate*.



Figure 1: Plugin Installation

3.1 App Registration in Microsoft Azure

- Navigate to <u>https://entra.microsoft.com/</u>
- Login with your Microsoft credentials.



- Choose Applications > App Register from the Sidebar.
- Click on New Registration as shown in *Figure 2*.

| N | Aicrosoft Entra admin center | | 𝒫 Search resources, services, and docs (G+/) | | P @ @ R | |
|----|------------------------------|--------|--|---|---------------------------------------|---------------------------------------|
| * | Diagnose & solve problems | * | Home > | | | |
| * | Favorites | ~ | App registrations 🖉 ··· | | | × |
| • | Identity | ^ | + New registration 🕀 Endpoints 🛠 Troubleshoot 🖒 Refresh 🞍 Downle | pad 👿 Preview features 🕴 🖗 Got feedback? | | |
| 0 | Overview | - 1 | Starting June 30th, 2020 we will no longer add any new features to Azure Active Direct | ory Authentication Library (ADAL) and Azure Active Dire | ectory Graph. We will continue to pro | wide technical support and $^{	imes}$ |
| 8 | Users | \sim | security updates but we will no longer provide feature updates. Applications will need | to be upgraded to Microsoft Authentication Library (MS | AL) and Microsoft Graph. Learn mor | 2 |
| ĥ | Groups | \sim | All applications Owned applications Deleted applications | | | |
| 5 | Devices | \sim | Start typing a display name or application (client) ID to filter these r | Add filters | | |
| ₿, | Applications | ^ | 2 | | | |
| | Enterprise applications | | 3 applications found | | | |
| | App registrations | | Display name Ti | Application (client) ID | Created on ⊤↓ | Certificates & secrets |
| A | Protection | ~ | | | | |
| ۲ | Identity Governance | \sim | | | | |
| qþ | External Identities | \sim | | | | |

Figure 2: App Registration in Microsoft

• Configure your application as per your requirement. Refer Figure 3 for further details.





Figure 3: Application registration

• Once the App has been registered in the Microsoft account, an Application ID/Client ID will be generated for the same. Refer Figure 4 for more details.



Figure 4: Application Details



• Click on Client Credentials and follow the steps for generating a Client Secret for this application. Refer Figure 4 for reference.

| Microsoft Entra admin center | | | |) | | 6 | \$ @ & | shahad.md@pitsolution |
|------------------------------|---------------------------|--------|--|--|-------------------------------------|---|------------------------------|---------------------------------|
| × | Diagnose & solve problems | 4 | Home > App registrations > Odoo-One | Drive Integration | | | | |
| * | Favorites | ~ | 🔶 Odoo-One Drive Int | egration Certi | ficates & secrets | \$ | | × |
| ۵ | Identity | ^ | | 🖗 Got feedback? | | | | |
| () | Overview | | Quickstart | Credentials enable confidential a | pplications to identify themselv | ves to the authentication service wh | en receiving tokens at a | web addressable location (using |
| 8 | Users | \sim | 🚀 Integration assistant | an HTTPS scheme). For a higher l | evel of assurance, we recomme | end using a certificate (instead of a | client secret) as a creden | tial. |
| ^ ?? ^A | Groups | \sim | 🗙 Diagnose and solve problems | | Genter country and forderstand area | dentials can be found in the table bala | | × |
| 8 | Devices | \sim | Manage | Application registration certi | incates, secrets and recerated cre | dentiais can be found in the tabs belo | w. | |
| ₿, | Applications | ^ | Branding & properties | Certificates (0) Client secr | rets (1) Federated credent | ials (0) | | |
| | Enterprise applications | | Authentication Certificates & secrets | A secret string that the applicati | ion uses to prove its identity w | hen requesting a token. Also can be | e referred to as application | on password. |
| | App registrations | | Token configuration | + New client secret | | | | |
| A | Protection | \sim | API permissions | Description | Expires | Value ① | Secret ID | |
| (2) | Identity Governance | \sim | 👄 Expose an API | Odoo-One Drive Integration | 3/25/2025 | 4Q2*********** | 011769b3-99 | ea-4030-9ff6-d08ec5 🗅 📋 |
| -0- | | | App roles | | | | | |

Figure 5: Generating a Client Secret

Note: Client secret values cannot be viewed, except for immediately after creation. Be sure to save the secret when created before leaving the page.

| Certificates (0) | Client secrets (1) | Federated credentials (0) |
|----------------------|----------------------|---|
| A secret string that | the application uses | to prove its identity when requesting a token. Also can be referred to as application password. |
| + New client sec | Client save th | ecret values cannot be viewed, except for immediately after creation. Be sure to e secret when created before leaving the page. |

Figure 6: Client Secret Value warning



3.2 Odoo Backend Configuration

- Once the Client Secret has been generated, go to Odoo Application and navigate to OneDrive menu and click on Configuration.
- Once the Client Secret has been generated, go to Odoo Application and navigate to OneDrive menu and click on Configuration.
- Provide Client ID (Application ID), Client Secret and Redirect URL and click on Save button.
- Redirect URL should be same as that of configured in the Application.
- Once these details are filled, Click on Authorize and Get Token button.
- This will redirect to Microsoft Login page for authentication.
- Once the authentication is successfully completed, the system will redirect to Odoo application.



| III OneDrive Attachments Configuration | | ٩ | 7 🛃 YourCompany 👹 |
|--|--------------|---------------------------|-------------------|
| Odoo - One Drive Integration | | | 1/1 < > |
| Authorize & Get Token | | Not Authorized Authorized | |
| Client ? a1024a60-c2c3- | | | |
| Secret Key 7 | | | |
| Redirect Url ? /callback | | | |
| Authority Url ? https://login.microsoftonline.com/consumers/ | | | |
| Base Url ² https://graph.microsoft.com/v1.0/ | | | |
| Select Models Select Mimetype | | | |
| Model Description | Model | | |
| Contact | res.partner | View 🗙 | |
| Journal Entry | account.move | View 🗙 | |
| Add a line | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | R | |
| | | | |
| | | | |

Figure 7: OneDrive configuration in Back End

- User can select the models from the list of models for which the attachments have to be uploaded and shared to OneDrive.
- User can also select the File Types (Mime Types) that must be shared.
- Only the attachments satisfying the model and file type in the configuration will be shared in the OneDrive.



| III OneDrive Attachments Configuration | | ≪7 | 🕗 YourCompany 🐻 |
|--|--------------|-----------------------|-----------------|
| Odoo - One Drive Integration | | | 1/1 < > |
| Authorize & Get Token | Not | Authorized Authorized | |
| Client [?] | | | |
| Secret Key ? | | | |
| Redirect Url ? | | | |
| Authority Url ² https://login.microsoftonline.com/consumers/ Base Url ² https://oranb.microsoft.com/v1.0/ | | | |
| Select Models Select Mimetype | | | |
| Model Description | Model | | |
| Contact | res.partner | View 🗙 | |
| Journal Entry | account.move | View 🗙 | |
| Add a line | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | N | |
| | | Lig ^a | |
| | | | |

Figure 8: Selection of Models

| III OneDrive Attachments Configuration | 🕸 髨 🛃 YourCompi | any 🛃 Mitche |
|---|-----------------|--------------|
| Odoo - One Drive Integration | | 1/1 |
| Reset Authorization | Not Authorized | |
| Client ² a1024a60-c | | |
| Secret Key 7 | | |
| Redirect Url ? /callback | | |
| Authority Url [†] https://login.microsoftonline.com/consumers/ | | |
| Base Url ⁷ https://graph.microsoft.com/v1.0/ | | |
| Select Models Select Mimetype | | |
| Name | 2 | |
| text/plain | × | |
| text/html | × | |
| application/pdf | × | |
| image/png | × | |
| image/jpeg | × | |
| video/mp4 | × | |
| application/msword | × | |
| application/vnd.openxmlformats-officedocument.wordprocessingml.document | × | |
| application/vnd.ms-excel | × | |
| application/vnd.openxmlformats-officedocument.spreadsheetml.sheet | × | |
| seefficienties here | - | |





 To obtain the URL for an attached file, navigate to OneDrive > Attachments and open the desired attachment. Please note that OneDrive will only be accessible if the file has been successfully uploaded.

| ConeDrive Attachments Configuration | 🔍 7 🕑 YourCompany 👹 |
|---|---------------------|
| Attachments one_drive.png 🛇 | 1/1 < > |
| | |
| one drive.png | |
| Type? URL | |
| | |
| Url https://onedrive.live.com?cid=ef83c57a69b3da24&id | |
| Mime Type image/png Share Document | |
| Update Document | |
| | |
| Crastion Mitchell Admin on RCR02005 17-4006 | |
| Creation Witchei Adhilli on 02/30/2023 1/36200 | |
| | |
| | |
| | |
| | |
| | |
| | R |
| | |

Figure 10: OneDrive URL from attachment

- If the uploaded file needs to be shared, the user can designate the attachment as a shared document by following these steps:
 - Enable the **"Share Document"** option by checking the corresponding checkbox.
 - Click the "Share" button to generate a unique sharing URL.
 - \circ ~ Use the generated URL to securely share the document with others.



• To revoke access, click the **"Stop Sharing"** button to deactivate the sharing link and prevent further access.

| . OneDrive Att | tachments Configuration |
|-----------------------------------|-----------------------------------|
| Attachments PDF File 1.pdf 🔅 🔏 | C 6 |
| Share | |
| _{Name} PDF File | 1.pdf |
| Type ? | URL |
| Url | https://onedrive.live.com?cid=BC8 |
| Mime Type | application/xml |
| Share Document | |
| | |

Figure 11: Generate sharing URL

| OneDrive | Attachments | Configuration | | |
|-------------------------------|-------------------|-----------------|--|--|
| ttachments DF File 1.pdf 📫 | ÷ | | | |
| Share by Mail | Stop sharing | | | |
| _{Name} PDF Fi | le 1.pdf | | | |
| Type ? | URL | | | |
| Url | https://onedrive. | ive.com?cid=BC8 | | |
| Mime Type | application/xml | | | |
| Sharing Url | https://1drv.ms/u | /c/bc83f9c | | |

Figure 12: Sharing the generated URL



- If the uploaded file needs to be updated, the user can upload the latest file by following these steps:
 - Enable the **"Update Document"** option by checking the corresponding checkbox.
 - Click on **"Update"** button.
 - This will upload the latest file by deleting the existing file.

| OneDrive Atta | chments Configuration |
|-----------------------------------|-----------------------------------|
| Attachments PDF File 1.pdf 🏩 🤷 | c |
| Update | |
| _{Name} PDF File 1 | .pdf |
| Type ? | URL |
| Url | https://onedrive.live.com?cid=BC8 |
| Mime Type | application/xml |
| Share Document | |
| Update Document | |
| Upload | Upload your file |

Figure 13: Updating the uploaded document



3.3 Kanban View for One Drive Attachments

| . OneDrive Attachments Configuration | | | 🔍 🥙 YourCompany 👹 |
|--------------------------------------|---|---|-------------------|
| Attachments | Q Search | - | 1-2/2 < > |
| odoo_jcon.png | one.drive.png Azure Interior © Ostri Download () Copy Link () OS/30/2025 17.49:06 | 4 | |
| | | | |

1. Related Record Link

Shows the Odoo record this file is attached to. Click to navigate directly to that record.

2. Open in OneDrive

Opens the file in OneDrive's web interface for viewing or editing.

3. Download

Saves a local copy of the file to your device.

4. Share

Creates a shareable link for the file. Only visible for files that aren't already shared.

5. Unshare

Removes the shareable link, making the file private again. Only shows for shared files.



6. Copy Link

Copies the shareable link to your clipboard. Available only when the file is shared.

4. Brief Description

The **Odoo OneDrive Integration Plugin** is a robust tool crafted to simplify attachment management within Odoo by automatically uploading selected files to Microsoft OneDrive. Its flexible configuration options allow users to control precisely which attachments are synced, ensuring only necessary files are stored in OneDrive.

Configuration Options

- Model Selection: Users can specify Odoo models for attachment uploads to OneDrive. This ensures that only relevant documents, such as invoices, reports, or other targeted records, are transferred, minimizing unnecessary storage usage.
- MIME Type Selection: The plugin supports file uploads filtered by MIME type, allowing users to select specific formats like PDFs, images, or text documents. This provides additional control over the types of files stored in OneDrive.
- Secure Authentication: The plugin requires users to input a Client ID (Application ID) and Client Secret generated during the Microsoft App registration, ensuring secure, compliant communication between Odoo and OneDrive.

Benefits

With this plugin, users can automate attachment storage in a secure cloud environment, enhancing document accessibility and organization. The model and filetype selection capabilities offer a customizable solution tailored to unique business needs, optimizing OneDrive storage and maintaining strict control over file uploads.





5. Technical Requirements / Compatible With:

- Compatible with Odoo 18.0 Community and Enterprise Editions
- External Library Microsoft Authentication Libraries (MSAL)

6. Change Log / Release Notes

Version 1.1.0 June 2025

• Smarter File Upload Handling

The system now verifies your OneDrive connection before performing file operations, eliminating errors from expired or invalid authentication.

• Redesigned Kanban View

The attachment management interface features a cleaner, more modern Kanban layout, allowing you to:

- Quickly see all documents
- Distinguish shared and private files
- View document status and sharing details clearly
- Share and update files more efficiently

• Enhanced Error Handling

Uploads are now automatically blocked if your OneDrive connection is inactive, ensuring operations proceed only when the connection is ready.

• Added Enterprise Compatibility

Version 1.0.0: October 2024

• Initial release.



7. Support

If you have questions, use our contact form at <u>webshopextension.com</u> or email at <u>support@webshopextension.com</u>.