



User Manual

Franchise Management Plugin for Odoo v19.0

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1 Introduction

The **PITS Franchise Management** module is a comprehensive, end-to-end solution designed to seamlessly bridge Odoo's core sales, inventory, and accounting functionalities with the unique demands of running a franchise network.

Managing multiple franchisees often involves complex agreements, varied royalty structures, unique pricing tiers, and strict inventory controls. This module simplifies that complexity by providing a centralized hub to oversee the entire franchisee lifecycle—from initial onboarding and contract compliance, right through to daily stock requests, consumption tracking, and automated royalty billing.

By automating the financial calculations and deeply integrating with Odoo's standard applications, PITS Franchise Management empowers franchisors to scale their operations securely while offering franchisees a transparent, self-service portal to manage their business relationship.

Group	Permissions
User	Read-only on all models
Manager	Read/write/create (no delete) on all models
Admin	Full CRUD on all models
Portal	Read-only on most; read/write/create on consumption + stock requests (so franchisees can submit reports and orders)

2 Features

2.1 Franchisee Onboarding & Tier Management

- **Franchise Tiers:** Group franchisees by tier (e.g., Gold, Standard) to set baseline financial terms like Royalty Percentage (%) and Brand Fee amounts.
- **Partner Integration:** Easily flag any contact as a "Franchisee" and link them directly to a physical store/stock location and active agreement.

2.2 Agreement Lifecycle & Compliance

- **Centralized Agreements:** Manage franchise contracts with strict start and end dates, outlining all specific financial terms.
- **Automated Expiration Tracking:** A system job runs nightly to automatically transition agreements to an 'Expired' status once the end date passes to prevent unauthorized operations.
- **Document Management:** Attach, classify, and track compliance documents (e.g., Signed Contracts, Business Licenses, KYC documents)—complete with their own expiry tracking.

2.3 Dynamic Pricing & Financial Overrides

- **Pricelist Inheritance:** Automatically applies Odoo's standard pricing rules based on the franchisee's assigned tier.
- **Product-Level Overrides:** Create custom, product-specific price or discount overrides for a specific franchise agreement (e.g., locking in a lower rate for signature ingredients) overriding standard pricelists.

2.4 Stock & Consignment Operations

- **Stock Requests:** Allows franchisees to request inventory either as a Direct Sale or as a Consignment Transfer.
- **Consignment Management:** Safely moves stock from the main parent warehouse to the specific franchisee's virtual stock location, separating ownership from physical possession until it is consumed.

2.5 Automated Sales & Royalty Billing

- **Consumption Tracking:** Log exactly what a franchisee consumes or sells from their consignment stock over a specific period.
- **Billing Periods:** The system aggregates all consumption data to automatically calculate the exact Royalty Fees (based on a percentage of sales) and flat Brand Fees.

- **Automated Invoicing:** Generates a consolidated customer invoice with one click, cleanly separating line items for Product Purchases, Consignment Settlements, Royalty Fees, and Brand Fees.

2.6 Franchisee Web Portal

- **Self-Service Dashboard:** Franchisees can log into the website portal to securely view their active agreements, download their signed contracts/license documents, and track their active stock requests and billing periods in real-time.

3 Installation

Installation Steps: -

1. Obtain the Plugin

Download or obtain the **PITS Franchise Management** plugin package from the provided source/repository.

2. Upload the Plugin to the Add-ons Path

For a standard Odoo installation:

Extract the plugin and place the **PITS Franchise Management** module folder in the configured Odoo custom add-ons directory.

If the project is managed through Git, pull or clone the latest plugin code into the configured custom add-ons repository/path.

For Odoo.sh:

Add the plugin/module to the project's Git repository. The module should be placed in a directory that is included in the Odoo.sh project's addons path.

Commit and push the changes to the appropriate branch of the Odoo.sh Git repository.

3. Verify the Module Path

For a standard Odoo installation:

Ensure that the plugin is located in a directory included in the `addons_path` configuration in the Odoo configuration file.

For Odoo.sh:

Ensure that the module is committed to the correct branch and located within the project directory structure recognized by Odoo.sh.

4. Restart Odoo**For a standard Odoo installation:**

Restart the Odoo server to load the newly added plugin/module.

For Odoo.sh:

Push the changes to the Odoo.sh branch. Odoo.sh will automatically build and deploy the updated branch.

Check the build status and ensure that the build completes successfully before proceeding.

5. Update the Apps List

Log in to the Odoo database and go to:

Apps → Update Apps List

Confirm the update when prompted.

Note: If the **Update Apps List** option is not visible, enable Developer Mode and try again.

6. Search for the Plugin

Go to: **Apps → Search**

Search for: PITS Franchise Management

7. Install the Plugin

Click **Install** to install and activate the plugin.

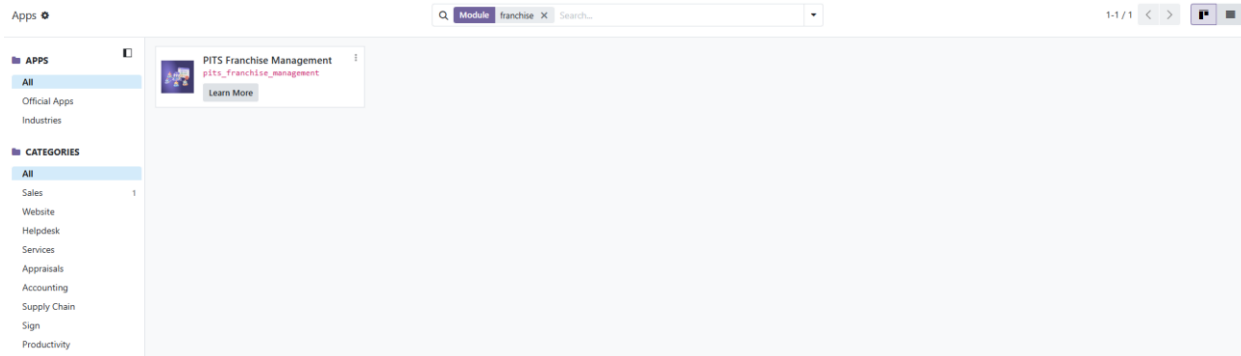


Fig: Franchise Management Plugin

4 Working

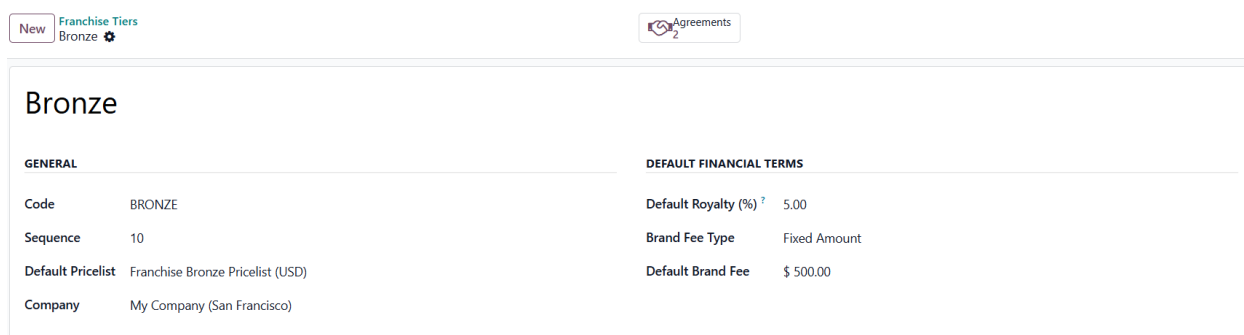
Glossary of Terms

- **Franchisee:** An independent person or company who runs a store using your brand.
- **Agreement:** The legal contract between Headquarters and the Franchisee. It says when they start, when they end, and how much they have to pay you.
- **Tier:** A category you put your franchisees in (like "Gold", "Silver", or "Bronze"). Gold members might get better discounts but have to pay higher monthly fees.
- **Royalty:** A percentage of the franchisee's sales that they must pay to Headquarters every month.
- **Direct Sale:** When a franchisee buys products from Headquarters. They literally pay you for the items and own them immediately.
- **Consignment:** When Headquarters sends products to a franchisee's store, but **Headquarters still owns the products**. The franchisee puts them on their shelves, but they only have to pay Headquarters *after* a customer buys the product.
- **Consumption Report:** When a franchisee submits a report of what consignment products they sold to customers during a time period. This is how HQ knows what was "consumed".
- **Billing Period:** A monthly or quarterly summary of everything a franchisee owes — consignment sales, royalties, brand fees, and surcharges — all rolled into one invoice.

Configuration: Franchise Tiers

Before onboarding franchisees, establishing franchise tiers is required to define standard financial terms.

1. Navigate to **Franchise > Configuration > Franchise Tiers**.
2. Click **New**.
3. Enter a name for the tier (e.g., "Gold Tier").
4. Define the standard financial parameters:
 - **Default Royalty %:** The percentage of sales owed to the franchisor.
 - **Default Brand Fee:** A fixed recurring marketing or brand fee.
5. Provide a default **Pricelist** for this tier.
6. Click **Save**.



The screenshot shows the 'Franchise Tiers' configuration page in Odoo. At the top, there are buttons for 'New' (with a plus icon) and 'Agreements' (with a minus icon). Below these is a search bar and a list of existing tiers. The 'Bronze' tier is selected and its details are shown in a form. The form is divided into two sections: 'GENERAL' and 'DEFAULT FINANCIAL TERMS'.

GENERAL		DEFAULT FINANCIAL TERMS	
Code	BRONZE	Default Royalty (%) ?	5.00
Sequence	10	Brand Fee Type	Fixed Amount
Default Pricelist	Franchise Bronze Pricelist (USD)	Default Brand Fee	\$ 500.00
Company	My Company (San Francisco)		

Fig: Creating Tiers

Franchisee Onboarding and Agreement Management

To register a new franchisee and establish their contract:

4.1 Creating the Agreement

1. Navigate to **Franchise > Agreements > Franchise Agreements**.
2. Click **New**.
3. Select or create the Partner (Franchisee).

4. Assign the appropriate Franchise Tier.
5. Define the Start Date and End Date of the agreement.
6. Specify the Billing Frequency (e.g., Monthly).
7. Click Save.


[Franchise](#)
[Dashboard](#)
[Agreements](#)
[Operations](#)
[Billing](#)
[Configuration](#)

New

Franchise Agreements

FRA/2026/0001

Documents

3

Invoices

0

Transfers

0

Suspend

Terminate

Draft

Active

Expired

FRA/2026/0001

FRANCHISEE

Franchisee

Al Reem Bakery LLC

Franchise Tier

Silver

Franchise Manager

OdooBot

Territory ?

Abu Dhabi — Al Wahda District

Territory Tags

AGREEMENT PERIOD

Start Date

Jan 1

End Date

Dec 31, 2027

Renewal Type

Automatic

Previous Agreement ?

Company

My Company (San Francisco)

Financial Terms

Documents

Billing

Stock

PRICING

Franchise Pricelist ?

Franchise Silver Pricelist (USD)

FEES

Royalty (%) ?

7.50

Brand Fee Type

Fixed Amount

Brand / Marketing Fee

\$ 1,000.00

Billing Frequency

Monthly

Fig: Franchisee Onboarding and Agreement Management

4.2 Document Management

1. From the Agreement record, click the **Documents** smart button.
2. Click **New** to upload relevant compliance documents (e.g., Signed Contracts, KYC).
3. Specify the **Document Type** and **Expiry Date**.
4. Upload the file and click **Save**.

Franchise

Dashboard

Agreements

Operations

Billing

Configuration

New

Franchise Documents

Signed Franchise Agreement — Al Reem

Document Name

Signed Franchise Agreement — Al Reem

Upload File

Upload your file

Document Type

Signed Agreement

Expiry Date

Dec 31, 2027

Agreement

FRA/2026/0001

Original signed franchise agreement. Notarized copy filed.

Fig: Document Management

4.3 Activating the Agreement

1. On the Franchise Agreement, click **Activate**.
2. The system will automatically configure a dedicated consignment location for the franchisee and grant them access to the Franchisee Portal.

Franchise

Dashboard

Agreements

Operations

Billing

Configuration

New

Franchise Agreements

/ FRA/2026/0001

Al Reem Bakery LLC

\$ Sales

0

Invoiced

\$ 15,931.25

Due

\$ 0.00

Lots/Serial Numbers

A

Person

Company

Al Reem Bakery LLC

info@alreembakery.ae

+971 2 555 1234

Address

Al Wahda Street, Plot 42

Street 2...

Abu Dhabi

State

ZIP

Country

Tax ID ?

not applicable

Website

e.g. https://www.odoo.com

Tags

e.g. "B2B", "VIP", "Consulting", ...

Is Franchisee ?

☒

Contacts

Sales & Purchase

Invoicing

Notes

Franchise

Is Franchisee ?

☒

Franchise Location

Franchise Locations/Al Reem Bakery LLC (FRA/202...

Franchise Tier

Silver

Fig: Franchise Contact

My account


Franchise Agreements
View and manage your franchise agreements


Documents
Access franchise documents


Sales Reports
Report products sold from consignment stock


Stock Orders
View stock requests and transfers


Consignment Inventory
View stock currently held in your store


Your Orders
Follow, view or pay your orders


Al Reem Bakery LLC
 Al Wahda Street, Plot 42
 Abu Dhabi
 +971 2 555 1234
 info@alreembakery.ae
[Edit information](#)

Fig: Franchise Portal

4.4 Product Price Overrides

If a franchisee negotiates special pricing that differs from their standard Tier Pricelist, you can define product-specific overrides on the agreement.

1. Open the Franchise Agreement.
2. Navigate to the Price Overrides tab.
3. Click Add a line to specify a custom Override Price or percentage discount for a specific product. This pricing will automatically apply to their future Stock Requests.

Financial Terms

Documents

Billing

Stock

PRICING

Franchise Pricelist ? Franchise Silver Pricelist (USD)

FEES

Royalty (%) ?7.50

Brand Fee TypeFixed Amount

Brand / Marketing Fee\$ 1,000.00

Billing FrequencyMonthly

Product	Override Price	Discount (%)	Valid From	Valid Until
[FURN_7777] Office Chair	2.75	0.00	Jan 1	Dec 31, 2027
Add a line				

Fig: Product Price Overrides

4.5 Fee Product and Accounting Configuration (Optional)

The three fee types (Royalty, Brand/Marketing, Surcharge) each map to a dedicated service product. These products control which income account and tax appear on the generated invoice lines.

To configure globally:

1. Navigate to Inventory > Products (or Sales > Products).
2. Search for Royalty Fee, Brand / Marketing Fee, or Surcharge / Penalty (internal references: ROYALTY-FEE, BRAND-FEE, SURCHARGE).
3. Open the product and go to the accounting tab.
4. Set the Income Account to the desired ledger account (e.g., *Franchise Royalty Income*, *Marketing Fee Revenue*).
5. On the General tab, set the Customer Taxes field if tax should apply to the fee.
6. Click Save.

Note: Taxes are applied only if configured on the product. If no tax is set, the invoice line is generated tax-free. This ensures fees are never incorrectly taxed without explicit intent.

Financial Terms
Documents
Billing
Stock

FEE PRODUCTS (FOR GL MAPPING)

Royalty Fee Product ?
[ROYALTY-FEE] Royalty Fee

Surcharge Product ?
[SURCHARGE] Surcharge / Penalty

Brand Fee Product ?
[BRAND-FEE] Brand / Marketing Fee

Period Start	Period End	Reported Sale...	Royalty Amount	Brand Fee Am	Surcharge Am...	Consignment ...	Total Billing A...	Statu
Feb 1	Feb 28	15,000.00	1,125.00	1,000.00	0.00	41.25	2,166.25	Draft

Fig: Fee Product and Accounting Configuration

4.6 Stock Operations

Franchisees can request inventory via the Franchisee Portal, which creates a Stock Request in the backend. The franchisor processes these requests based on the selected transfer type.

4.7 Transfer Types

When a stock request is created, it must specify one of two transfer types, which dictates how inventory and billing are handled:

Direct Sale: Treated as a standard B2B sale. Generating the transfer creates an Outgoing Delivery. Once shipped, ownership transfers immediately to the franchisee, and a direct Customer Invoice is created for the goods.

Consignment Transfer: Treated as an internal branch transfer. Generating the transfer creates an Internal Delivery, moving stock from the main warehouse to the franchisee's virtual location. The Franchisor retains ownership. The franchisee is billed later via Consumption Reports and Billing Periods, not upfront.

4.8 Processing Stock Requests

1. Navigate to **Franchise > Operations > Stock Requests**.
2. Select a request in the "**Draft**" state.
3. Review the requested lines and the **Transfer Type** (Direct Sale or Consignment).
4. Click **Approve**.
5. Click **Create Transfer** to generate the delivery order (stock.picking).
6. Once the warehouse processes the delivery, validate the transfer.
7. Return to the Stock Request and click **Mark Done**.
8. For Direct Sales, an additional **Create Invoice** button will appear on the Stock Request. Click it to generate the corresponding customer invoice for the purchased products. Consignment transfers do not generate invoices at this stage.

+ New Stock Request

Fill in the form below to request products from Headquarters. Your request will be submitted as a Draft for the Franchise Manager to review and approve.

Order Details

Franchise Agreement *
FRA/2026/0001 — Silver

Transfer Type *
Consignment (HQ retains ownership)
Consignment: you only pay when sold. Direct: you buy now.

Notes (Optional)
Any special instructions for this order...

Products

+ Add Product

Product	Quantity
-- Select Product --	1

Click "Add Product" to add more items to your order.

← Cancel

Submit Request

Fig: Stock Operations Portal

 Franchise
 Dashboard
 Agreements
 Operations
 Billing
 Configuration

New
 Stock Requests
 FSR/2026/0003
 ⚙️

Create Transfer
 Cancel
 Draft
 Approved
 Transferred
 Done

FSR/2026/0003

REQUEST DETAILS

TRANSFER INFO

Agreement [FRA/2026/0003](#)

Franchisee [Golden Grain Pastries](#)

Request Date Mar 5

Transfer Type Consignment

Transfer

Invoice

Total Qty 280.00

Total Value 1,020.00

Products

Product	Qty Request...	Qty Approved	Unit Price	Subtotal
[FURN_7777] Office Chair	200.00	200.00	3.50	700.00 
Deposit	100.00	80.00	4.00	320.00 
Add a line				

Fig: Stock Operations Backend

4.9 Consumption Reporting

For consignment stock, the franchisee must report their sales for billing purposes.

1. The franchisee submits a Consumption Report via the portal, detailing sold quantities.
2. Navigate to Franchise > Operations > Consumption Reports.
3. Open reports in the "Submitted" state.
4. Review the reported quantities.
5. Click Approve to accept the report or Reject to return it for corrections. Only approved reports are eligible for billing.



Franchise Dashboard Agreements Operations Billing Configuration

New Consumption Reports
FCR/2026/0002

Draft Submitted **Approved**

FCR/2026/0002

Agreement [FRA/2026/0003](#) Period Start Feb 1
Franchisee [Golden Grain Pastries](#) Period End Feb 28
Franchise Location ? [Franchise Locations/Golden Grain Pastries \(FRA/...](#) Reported Sales Total ? \$ 28,500.00

Products Sold

Notes

Product	Qty Sold	Unit of Measure	Unit Price	Subtotal
Deposit	42.00	Units	4.00	\$ 168.00
Total Value:				\$ 168.00

Fig: Consumption Report Backend

Report Consignment Sales

Tell Headquarters which consignment products you sold during this period. Your report will be submitted for approval.


Report Details

Franchise Agreement *

FRA/2026/0001 — Silver

Period Start *

dd-mm-yyyy

Period End *

dd-mm-yyyy

Total Sales Revenue *

Enter your total cash register sales

Your total revenue from ALL sales during this period (used by HQ to calculate royalty).

Notes (Optional)

Any notes about this period's sales...


Products Sold

+ Add Product

Product	Qty Sold
-- Select Product --	1

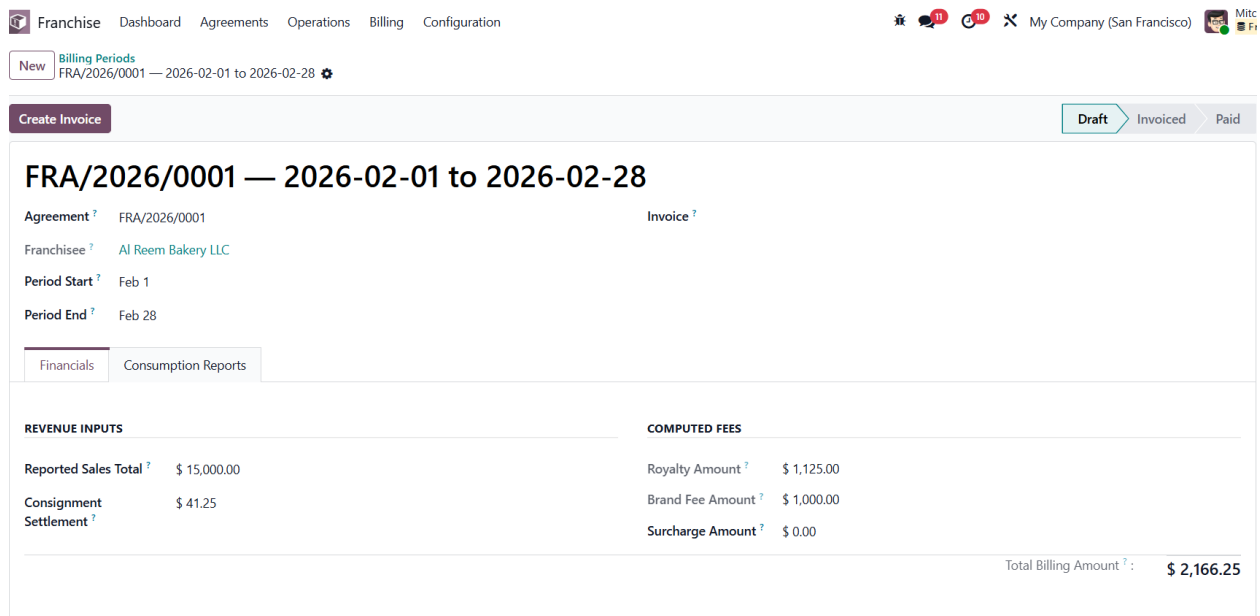
Fig: Consumption Report Portal

4.10 Billing and Invoicing

The billing process aggregates consumption and calculates applicable fees.

1. Navigate to **Franchise > Billing > Billing Periods**.
2. Click **New**.
3. Select the associated Agreement and define the **Period Start** and **Period End** dates.
4. The system automatically fetches and links all approved consumption reports within this timeframe to calculate the Consignment Settlement.

5. Enter the Reported Sales Total (the franchisee's gross sales for the period). The system will automatically calculate the Royalty Fee and apply the Brand Fee.
6. Review the Total Billing Amount.
7. Click Create Invoice. The system will generate a categorized account.move record.
8. Process and post the invoice in the Accounting application. When the invoice is marked as Paid, the Billing Period will automatically update its state to "Paid".



The screenshot shows the 'Create Invoice' form in the Franchise Management Plugin. The form is for the agreement FRA/2026/0001, which is for Al Reem Bakery LLC, covering the period from Feb 1 to Feb 28. The form is currently in 'Draft' status. The 'REVENUE INPUTS' section shows a Reported Sales Total of \$15,000.00 and a Consignment Settlement of \$41.25. The 'COMPUTED FEES' section shows a Royalty Amount of \$1,125.00, a Brand Fee Amount of \$1,000.00, and a Surcharge Amount of \$0.00. The total billing amount is \$2,166.25.

REVENUE INPUTS		COMPUTED FEES	
Reported Sales Total	\$ 15,000.00	Royalty Amount	\$ 1,125.00
Consignment Settlement	\$ 41.25	Brand Fee Amount	\$ 1,000.00
		Surcharge Amount	\$ 0.00
		Total Billing Amount	\$ 2,166.25

Fig: Billing and Invoicing

4.11 Franchisee Portal Features

The franchisee interacts with the system via a secure, self-service web portal. Available features include:

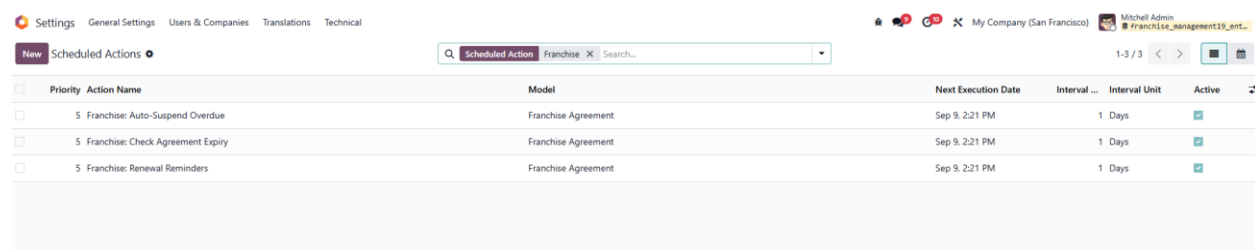
- **Agreements:** View active contract details and download signed documents.
- **Stock Requests:** Initiate new requests for Direct Sale or Consignment inventory.
- **Consignment Inventory:** View real-time stock levels of franchisor-owned inventory at their location.
- **Consumption Reports:** Submit sales data for consignment stock and track report approval status.

Automated Scheduled Actions (Cron Jobs)

The module includes automated actions to streamline administration:

- **Check Agreement Expiry:** Runs daily to identify active agreements past their end date and automatically updates their state to "Expired".
- **Renewal Reminders:** Runs daily to identify agreements expiring within 30, 60, or 90 days, generating automated activity reminders for responsible users.
- **Auto-Suspend Overdue:** Runs daily to identify invoices overdue by more than 60 days. If found, the system automatically suspends the associated franchise agreement until payment is resolved.

To review or configure these actions, navigate to Settings > Technical > Scheduled Actions and search for "Franchise".



Priority	Action Name	Model	Next Execution Date	Interval ...	Interval Unit	Active
5	Franchise: Auto-Suspend Overdue	Franchise Agreement	Sep 9, 2:21 PM	1	Days	☒
5	Franchise: Check Agreement Expiry	Franchise Agreement	Sep 9, 2:21 PM	1	Days	☒
5	Franchise: Renewal Reminders	Franchise Agreement	Sep 9, 2:21 PM	1	Days	☒

Fig: Franchise Scheduled Actions

4.12 Reports

The system provides out-of-the-box PDF reports that can be generated at any time.

- **Franchise Agreement Report:** Available from the Franchise Agreement screen. Generates a formal PDF outlining all parties, terms, duration, financial rules (Royalties, Brand Fees), and any negotiated product overrides to serve as a physical contract reference.

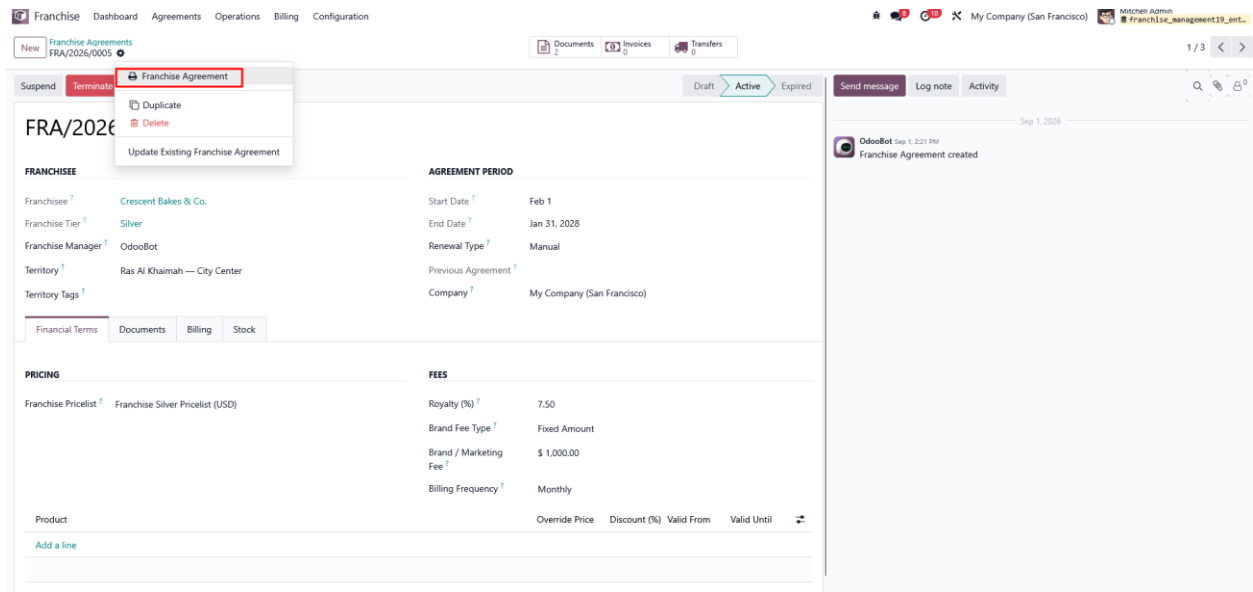


Fig: Franchise Agreement Report

- **Stock Request Report:** Available from the Stock Request screen. Generates a PDF breakdown of the items requested versus approved, summarizing total order value and transfer type.

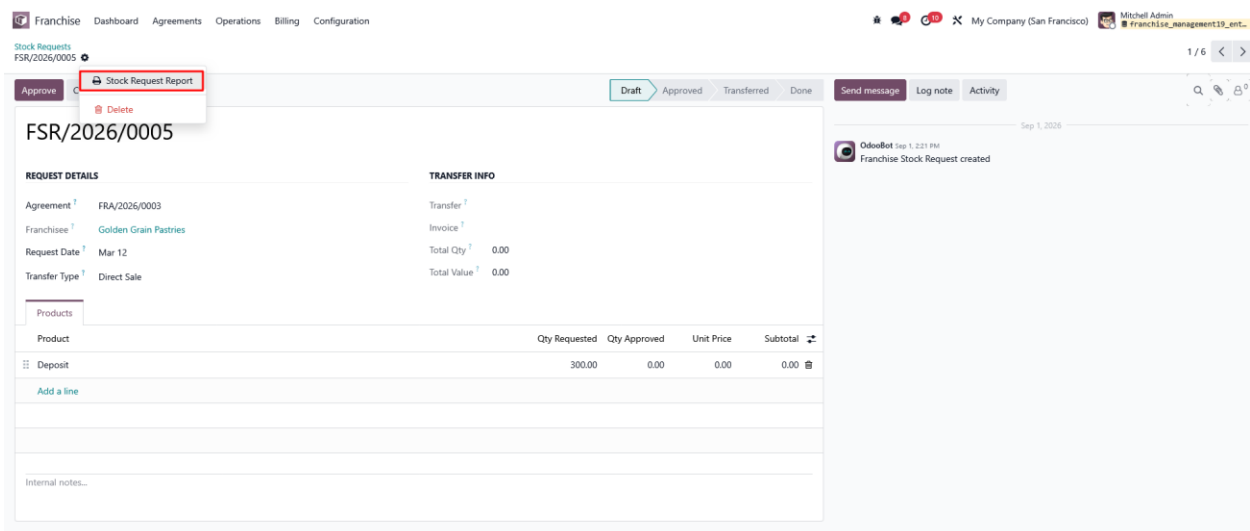


Fig: Franchise Stock Request Report

5 Technical Requirements / Compatibility

- **Technical Requirements:**
 - **Odoo Modules:** sale_management, contacts, stock, account, product and portal
- **Compatibility**
 - Odoo Community and Enterprise Editions v19.0

6 Changes Log / Release Notes

- **Version 1.0.0: September 2026**
 - Initial release.

7 Support

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