



User Manual

Equipment Management for Odoo v19.0

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1. Introduction

The Equipment Management module helps organizations manage equipment inventory, borrowing, issuing, and returns in Odoo 19. It supports both serialized items (unique serial numbers such as laptops, projectors, or lab devices) and non-serialized items (bulk stock such as pens, balls, or tools without individual serial tracking).

It provides a complete approval-based Issue Request workflow: Draft → Submit → Approve → Issue → Return → Close. Every transaction tracks serial allocation, return condition (Good / Damaged / Lost), overdue monitoring, repair of damaged serials, lost write-off, and optional late-return penalties.

Managers can monitor real-time availability, overdue requests, damaged/repair status, lost units, and usage trends from the Dashboard and Reporting menus, with role-based access for Equipment User and Equipment Manager.

2. Features

- **Equipment Master Data:** Create and manage equipment with Category, Brand, Manufacturer, Internal Code, Borrow Duration, and Penalty per Day.
- **Serialized & Non-Serialized Support:** Handle unique serial copies and bulk non-serial stock in one module.
- **Serial Copy Lifecycle:** Track each serial with Status (Available / Issued / Maintenance / Lost) and Condition (Good / Damaged / Under Maintenance / Lost).
- **Issue Request Workflow:** Draft → Submit → Approve → Issue → Return → Close, with clear cancel rules.
- **Smart Serial Allocation:** At Issue, only Available + Good serials can be selected or auto-assigned.
- **Flexible Return Wizard:** Partial returns, split quantities by condition (Good / Damaged / Lost), and serial-level selection.
- **Stock Counters:** Real-time Available, Issued, Lost, and Damaged quantities for both equipment types.
- **Repair Workflow:** After Damaged return, managers use Mark as Repaired to set Condition = Good and Status = Available.

- **Lost Handling:** Lost return or Mark as Lost sets both Status and Condition to Lost for consistency.
- **Overdue Tracking:** Detect overdue Issued requests, chatter notifications, and provisional penalties.
- **Penalty Management:** Auto-calculate late fees; Mark as Paid; Close blocked until penalties are paid.
- **Role-Based Access:** Equipment User vs Equipment Manager for configuration, approve, close, and repair actions.
- **Dashboard & Analytics:** KPI cards, usage charts, pivot analysis, and PDF inventory/issue/penalty reports.
- **Chatter & Activity Tracking:** Full communication history on issue requests and serial copies.

3. Installation

Installation Steps: -

1. Obtain the Plugin

Download or obtain the **PITS Equipment 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 Equipment 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: Equipment Management

7. Install the Plugin

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

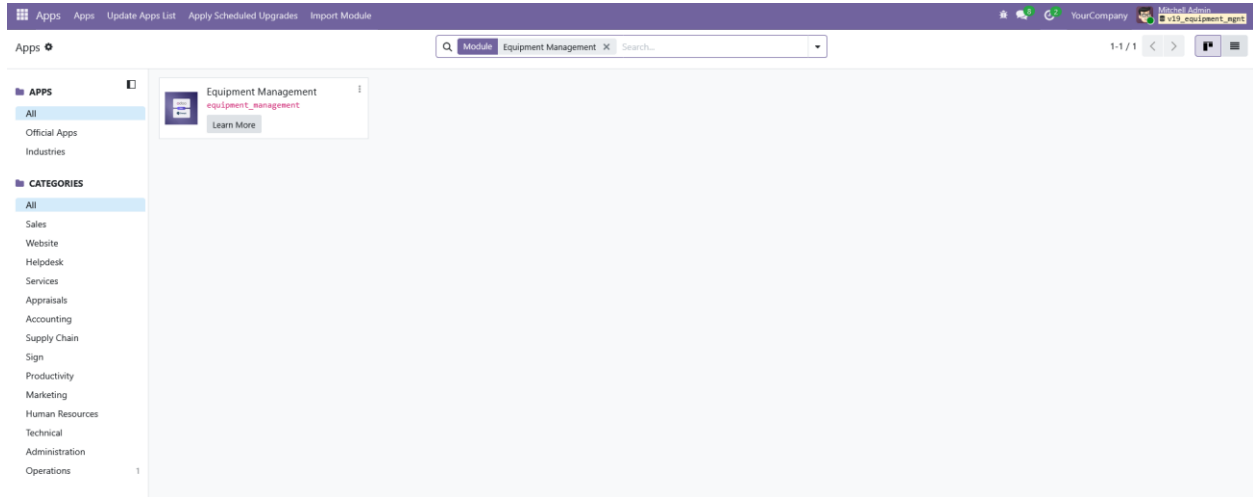


Fig 1: Equipment Management Module

4. Working

User Access Rights

Menu path: Settings → Users & Companies → Users

Process:

- Open Settings.
- Go to Users & Companies → Users.

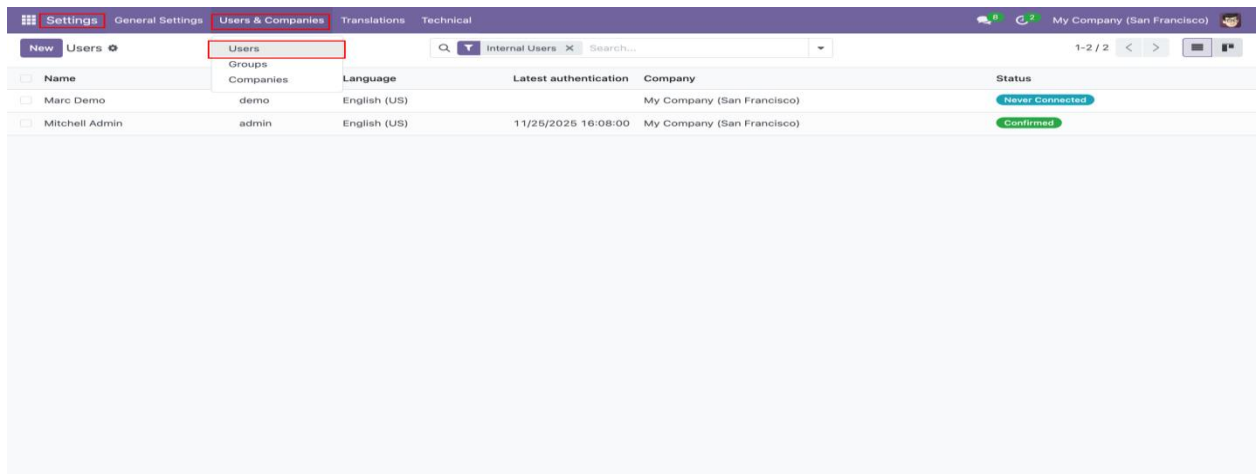


Fig 2: Equipment Management - User Access

- Open the user record.
- Under Access Rights, set Equipment Management to Equipment User or Equipment Manager.
- Save.

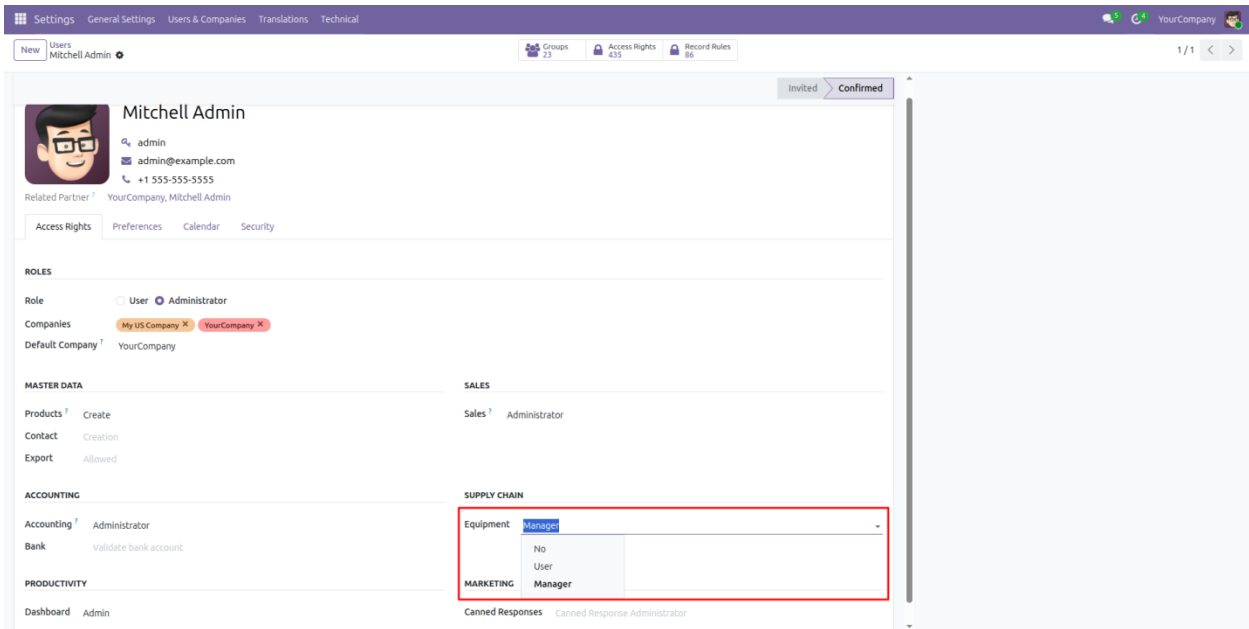


Fig 3: Equipment Management - Provide Access Rights

Explanation:

- Equipment User: can create and submit their own Issue Requests, return issued equipment, and view equipment masters. They cannot approve/close requests or change configuration masters.
- Equipment Manager: full access to Categories, Brands, Manufacturers, Equipment, Serial Copies; can Approve and Close requests; can Mark as Repaired / Mark as Lost.

Without these rights, the Equipment menu actions will be missing or read-only.

Dashboard

Menu path: Equipment → Dashboard

Process:

- Open Equipment → Dashboard.
- Review KPI cards and charts for your company.
- Click a KPI card to open the related list (for example Available equipment or Overdue requests).

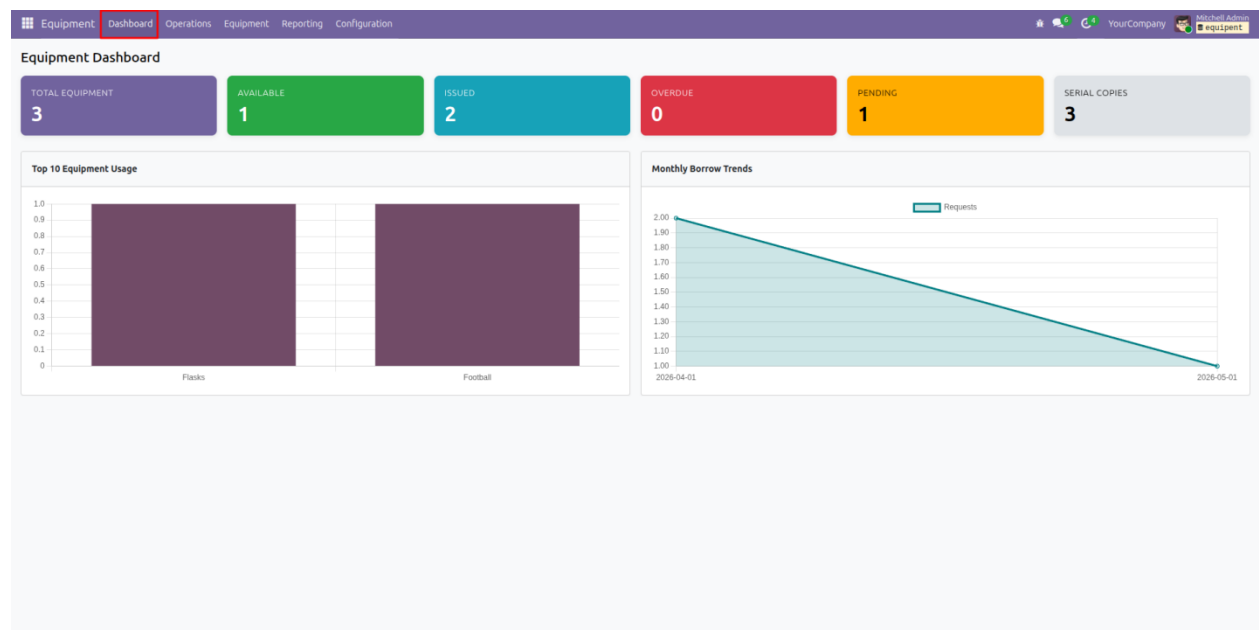


Fig 4: Equipment Management – Dashboard

Explanation:

- Typical KPIs: Total Equipment, Available, Issued Requests, Overdue, Pending (Submitted/Approved), Serial Copies.
- Charts usually show top equipment usage and monthly borrow trends. Use this screen for a daily operational overview before opening detailed menus.

Configuration – Categories

Menu path: Equipment → Configuration → Categories

Process:

- Open Categories.

- Click New.
- Enter Name (required).
- Enter Code (optional but recommended).
- Save. Use Active to archive unused categories.

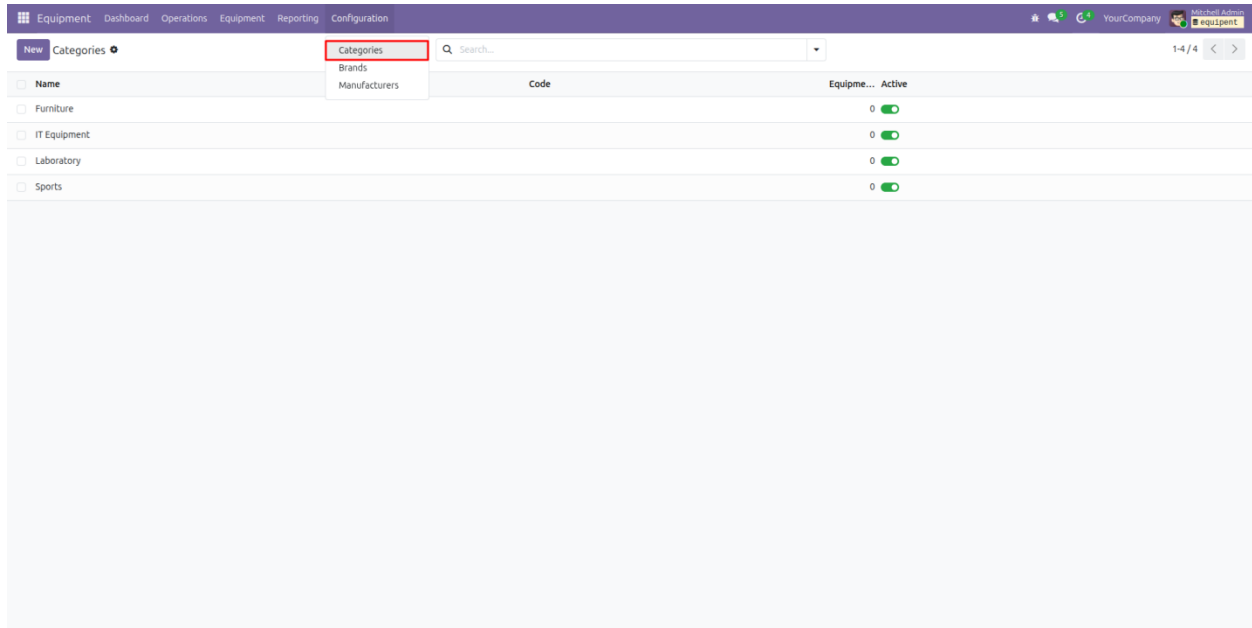


Fig 5: Equipment Management – Category

Explanation:

Categories group equipment (for example Electronics, Sports, Laboratory). Name and Code must be unique per company. The form shows Equipment Count and linked equipment. Configure categories before creating equipment.

4. Configuration – Brands

Menu path: Equipment → Configuration → Brands

Process:

- Open Brands.
- Click New (or add inline).
- Enter Brand Name.

- Save.



Fig 6: Equipment Management – Brands

Explanation:

Brands are optional on Equipment and help with filtering and reporting. Only managers can create/edit; users can view.

Configuration – Manufacturers

Menu path: Equipment → Configuration → Manufacturers

Process:

- Open Manufacturers.
- Click New.
- Enter Manufacturer Name.
- Save.

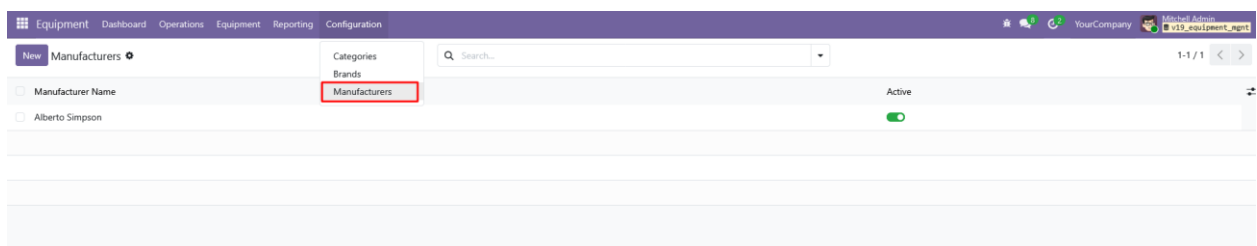


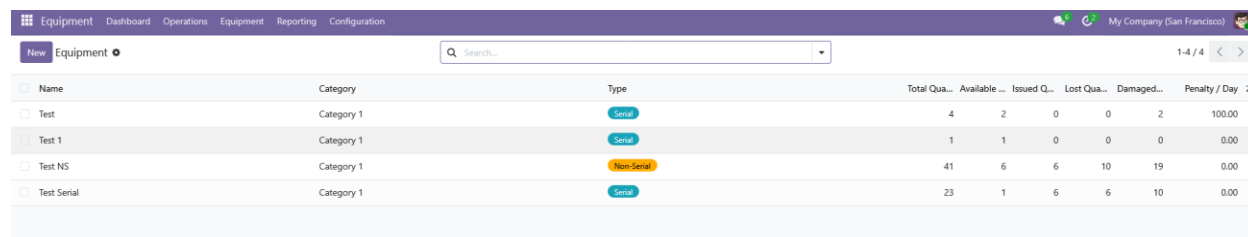
Fig 7: Equipment Management – Manufacturers

Explanation:

Manufacturers are optional master data linked to Equipment for classification and reporting.

Equipment Master

Menu path: Equipment → Equipment → Equipment



Name	Category	Type	Total Qua...	Available ...	Issued Q...	Lost Qua...	Damaged...	Penalty / Day
Test	Category 1	Serial	4	2	0	0	2	100.00
Test 1	Category 1	Serial	1	1	0	0	0	0.00
Test NS	Category 1	Non-Serial	41	6	6	10	19	0.00
Test Serial	Category 1	Serial	23	1	6	6	10	0.00

Fig 8: Equipment Management – Equipment List View

Process to create equipment:

- Click New.
- Enter Name.
- Enter Internal Code (unique per company).
- Select Category (required).
- Optionally select Brand and Manufacturer.
- Choose Type: Serial or Non-Serial.
- Set Borrow Duration (days) and Penalty / Day.
- For Non-Serial: enter Total Quantity.
- For Serial: add Serial Copies on the Serial Copies tab (Total Quantity becomes the copy count).
- Save.

Explanation of key fields:

- Internal Code: unique identifier per company for search and reporting.
- Borrow Duration: default days used to set Expected Return Date at Issue if empty.
- Penalty / Day: rate used in late-return penalty calculation.
- Available / Issued / Lost / Damaged: computed counters.

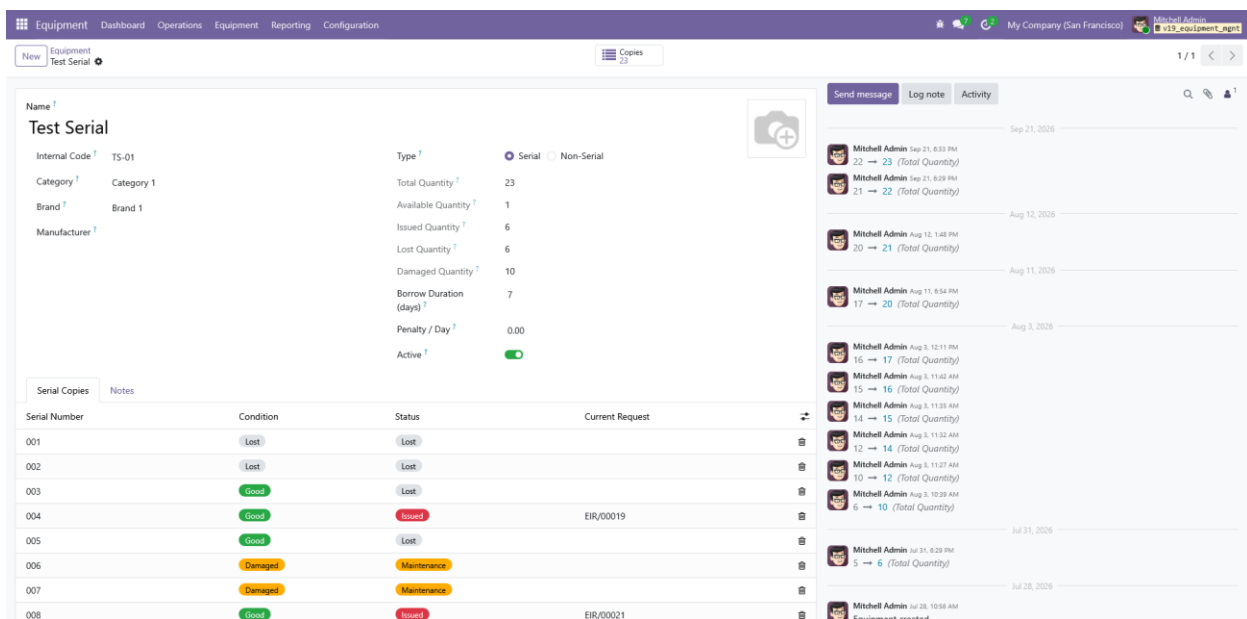
Stock calculation:

- Serial Available = copies with Status = Available AND Condition = Good.
- Serial Issued / Lost / Damaged come from copy Status/Condition.
- Non-Serial Available = Total – Outstanding Issued – Lost – Damaged.
- Non-Serial Outstanding Issued reduces immediately on partial Good returns.

Serial vs Non-Serial

Process:

- Open the equipment form.
- Select Type = Serial or Non-Serial.
- If Serial, create one Serial Copy per physical unit.
- If Non-Serial, maintain stock using Total Quantity only (no serial list).



Equipment Management - Equipment Types

Test Serial

Internal Code: TS-01
Category: Category 1
Brand: Brand 1
Manufacturer:

Type: ☒ Serial ☐ Non-Serial

Total Quantity: 23
Available Quantity: 1
Issued Quantity: 6
Lost Quantity: 6
Damaged Quantity: 10
Borrow Duration (days): 7
Penalty / Day: 0.00
Active: ☒

Serial Number	Condition	Status	Current Request
001	Lost	Lost	
002	Lost	Lost	
003	Good	Lost	
004	Good	Issued	EIR/00019
005	Good	Lost	
006	Damaged	Maintenance	
007	Damaged	Maintenance	
008	Good	Issued	EIR/00021

Activity Log

- Mitchell Admin: Sep 21, 2026
22 → 23 (Total Quantity)
- Mitchell Admin: Sep 21, 2026
21 → 22 (Total Quantity)
- Mitchell Admin: Aug 12, 2026
20 → 21 (Total Quantity)
- Mitchell Admin: Aug 11, 2026
17 → 20 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
16 → 17 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
15 → 16 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
14 → 15 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
12 → 14 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
10 → 12 (Total Quantity)
- Mitchell Admin: Aug 3, 2026
6 → 10 (Total Quantity)
- Mitchell Admin: Jul 31, 2026
5 → 6 (Total Quantity)
- Mitchell Admin: Jul 28, 2026
Equipment created

Fig 9: Equipment Management – Equipment Types

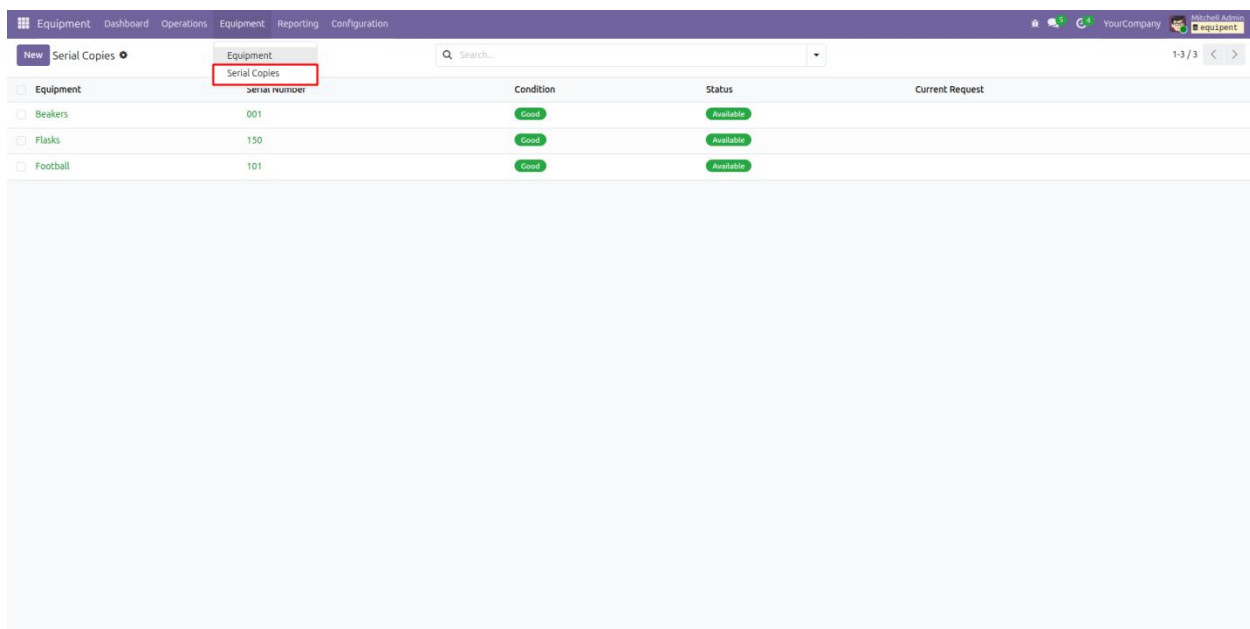
Explanation:

Use Serial for unique assets that must be tracked individually. Use Non-Serial for bulk items where only quantity matters. Mixing is not supported on one equipment record; choose the correct type at creation.

Serial Copies – Status, Condition, Repair & Lost

Menu path: Equipment → Equipment → Serial Copies

Also: Equipment form → Serial Copies tab / Copies smart



Equipment	SERIAL NUMBER	Condition	Status	Current Request
Beakers	001	Good	Available	
Flasks	150	Good	Available	
Football	101	Good	Available	

Fig 10: Equipment Management – Serial Copies

Process to create a serial copy:

- Open Serial Copies (or equipment form tab).
- Click New / Add a line.
- Select Equipment (must be Serial type).
- Enter Serial Number (unique in the system).
- Set Condition = Good and Status = Available for new issuable stock.

- Save.

Status meanings:

- Available – in stock; issuable only if Condition = Good.
- Issued – currently allocated to an Issue Request.
- Maintenance – under repair (typical after Damaged return).
- Lost – written off / missing.

Condition meanings:

- Good – usable.
- Damaged – physically damaged.
- Under Maintenance – being repaired.
- Lost – lost/written off.

Consistency rule:

If Status is set to Lost, Condition is also set to Lost (and vice versa). This keeps reporting and availability consistent.

Mark as Repaired:**Process:**

- Open a serial that is Damaged / Maintenance (after damage return).
- Click Mark as Repaired.
- System sets Condition = Good and Status = Available.

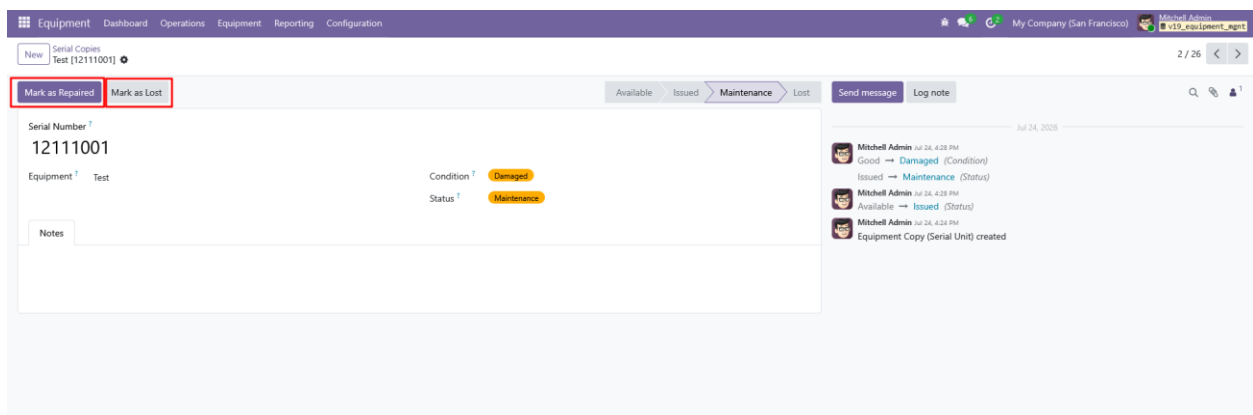
Explanation:

Damaged returns do not become issuable automatically. After repair, the manager must Mark as Repaired. Not allowed while Status = Issued or Lost.

Mark as Lost:

Process:

- Open the serial (not currently Issued).
- Click Mark as Lost.
- System sets Status = Lost and Condition = Lost.



Screenshot 11: Equipment Management – Serial Copies form view.

Explanation:

Use this for write-off outside the return wizard. If the serial is still Issued, return the request first (as Lost condition) instead.

Issue Request Lifecycle

Menu path: Equipment → Operations → Issue Requests

Reference number is generated automatically (for example EIR/00001).

States:

Draft → Submitted → Approved → Issued → Returned → Closed

Cancel is allowed only from Draft / Submitted / Approved. Cancel is NOT allowed from Issued, Returned, or Closed.

Process – create and submit:

- Click New.
- Requester defaults to current user (editable in Draft).
- Optionally set Department and Purpose.
- Set Issue Date and Expected Return Date (Expected Return must be on/after Issue Date).
- On Equipment Lines, add Equipment and Quantity.
- For Serial equipment, optionally pre-select Allocated Serials (only Available + Good appear).
- Click Submit.

Explanation:

Submit requires at least one line. After Submit, the request waits for manager approval.

Process – approve and issue:

- Manager opens the Submitted request.
- Click Approve (Manager only). Approver and Approval Date are set.
- Click Issue Equipment.
- System allocates stock:

Serial: uses selected serials or auto-picks Available + Good copies; sets each copy Status = Issued and links Current Request.

Non-Serial: checks Available quantity $\geq$ requested quantity.
- If Expected Return Date is empty, it is filled as Issue Date + max Borrow Duration from lines.

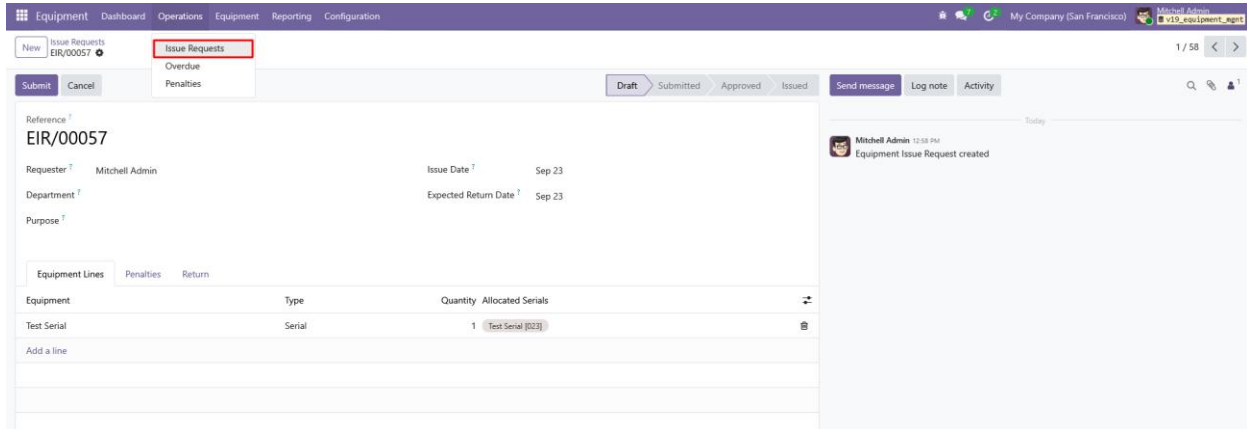


Fig 12: Equipment Management – Issue Request.

Explanation:

Backend requires Approved before Issue. Always Approve first, then Issue. Concurrent allocations avoid double-booking of the same serial.

Process – return and close:

- From Issued request, click Return (opens Return Wizard – see next section).
- After full return, state becomes Returned.
- If late, a Penalty is created.
- Mark penalties as Paid.
- Manager clicks Close → Closed.

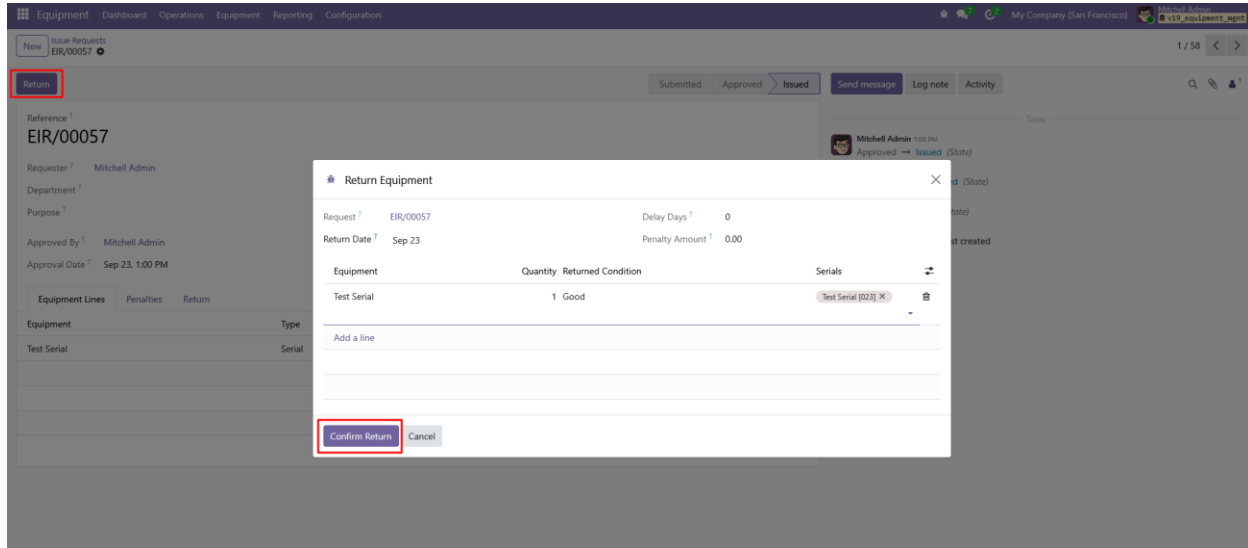


Fig 13: Equipment Management – Equipment Return Request.

Cancel / Reset:

- Cancel: only before Issue/Return/Close.
- Issued requests must be returned before any cancel attempt (cancel is blocked).
- Returned requests must be Closed, not Cancelled.
- Reset to Draft is available from Cancelled.

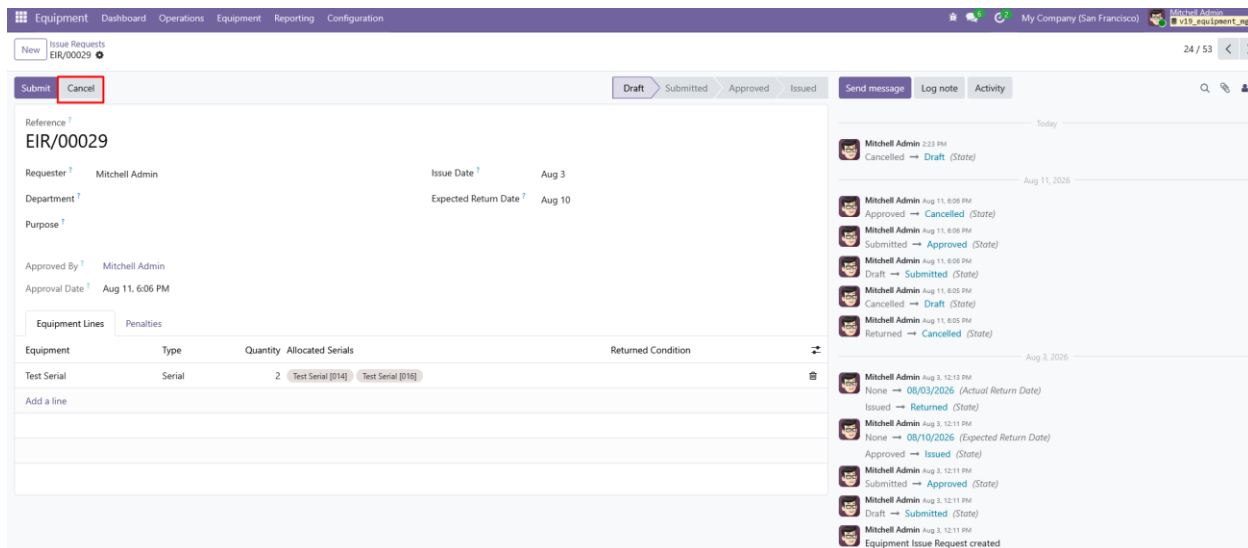
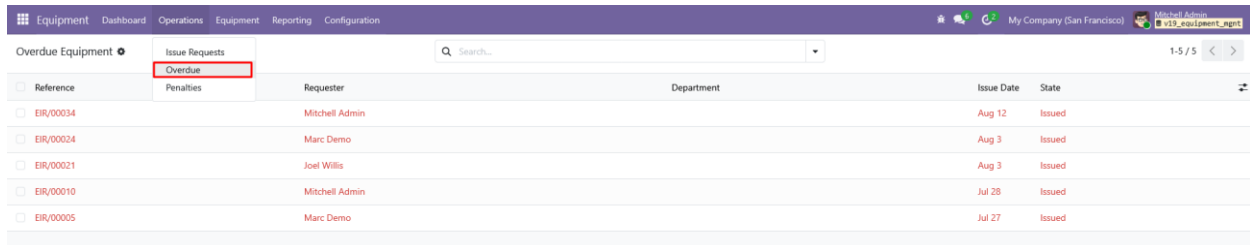


Fig 14: Equipment Management – Cancel Equipment Request.

Overdue menu:

Equipment → Operations → Overdue lists Issued requests past Expected Return Date. A daily job can post overdue chatter and create provisional penalties.



Reference	Requester	Department	Issue Date	State
☐ EIR/00034	Mitchell Admin		Aug 12	Issued
☐ EIR/00024	Marc Demo		Aug 3	Issued
☐ EIR/00021	Joel Willis		Aug 3	Issued
☐ EIR/00010	Mitchell Admin		Jul 28	Issued
☐ EIR/00005	Marc Demo		Jul 27	Issued

Fig 15: Equipment Management – Overdue.

Return Equipment Wizard (Partial, Split Conditions, Serial Rules)

Opened from: Issue Request form → Return (only when state = Issued)

Process:

- Open an Issued request.
- Click Return.
- Set Return Date (defaults to today).
- Review Delay Days / Penalty Amount preview.
- In return lines, set Equipment, Quantity, Returned Condition, and Serials (for serial equipment).
- To split conditions, add multiple lines for the same equipment (example: qty 2 Good + qty 1 Damaged).
- To return partially, enter less than remaining quantity; request stays Issued until fully returned.
- Click Confirm Return.

Serial selection rules:

- Serials are required for serial equipment.
- Number of selected serials must equal line Quantity.
- Same serial cannot be selected on two wizard lines.
- Serial already returned earlier (for example 014) is hidden on the next return.
- Serial selected on line 1 is hidden from line 2 dropdown in the same wizard.
- Returned quantity cannot exceed remaining outstanding quantity.

After Confirm:

- Partial return → request remains Issued; return again later for remaining qty.
- Full return → request becomes Returned; late penalty is calculated if applicable.

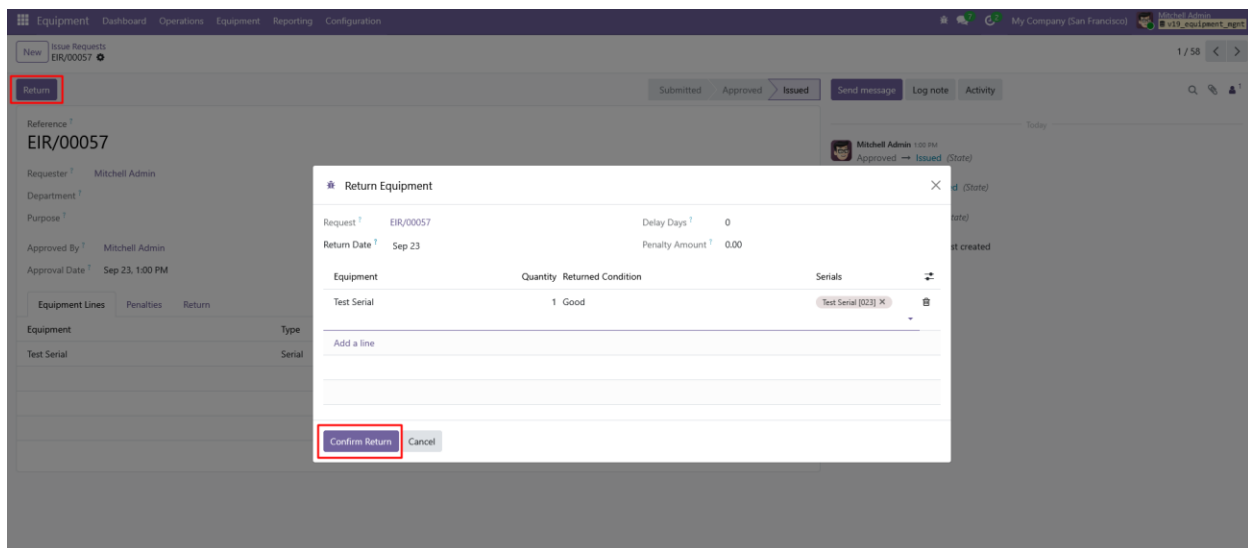


Fig 16: Equipment Management – Equipment Return Request.

Penalties

Menu path: Equipment → Operations → Penalties

Also: Issue Request → Penalties tab

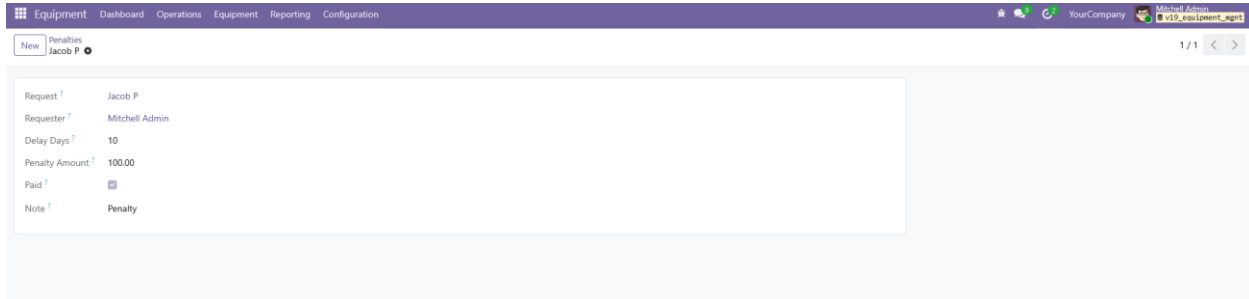


Fig 17: Equipment Management – Penalties

Process:

- Open Penalties (or open from the request).
- Review Delay Days and Penalty Amount.
- After collection, click Mark as Paid.
- Then Manager can Close the request.

Explanation / calculation:

Penalties are created automatically on late full return (and provisionally by overdue job), not normally created manually.

Delay Days = Actual Return Date – Expected Return Date (if > 0).

Rate = Sum of (Line Quantity × Equipment Penalty / Day).

Amount = Delay Days × Rate.

If returned on time, penalties for that request are removed. Close is blocked while any penalty is unpaid.

Equipment Inventory Report

There are Two ways you can print the Equipment Inventory report:

Method 1: Print the Inventory Report for Specific Equipment:

- Use this option to generate the inventory report for a single equipment record.
 - Navigate to Equipment -> Equipment -> Open the desired Equipment record -> click the Settings icon -> Print Equipment Inventory Report

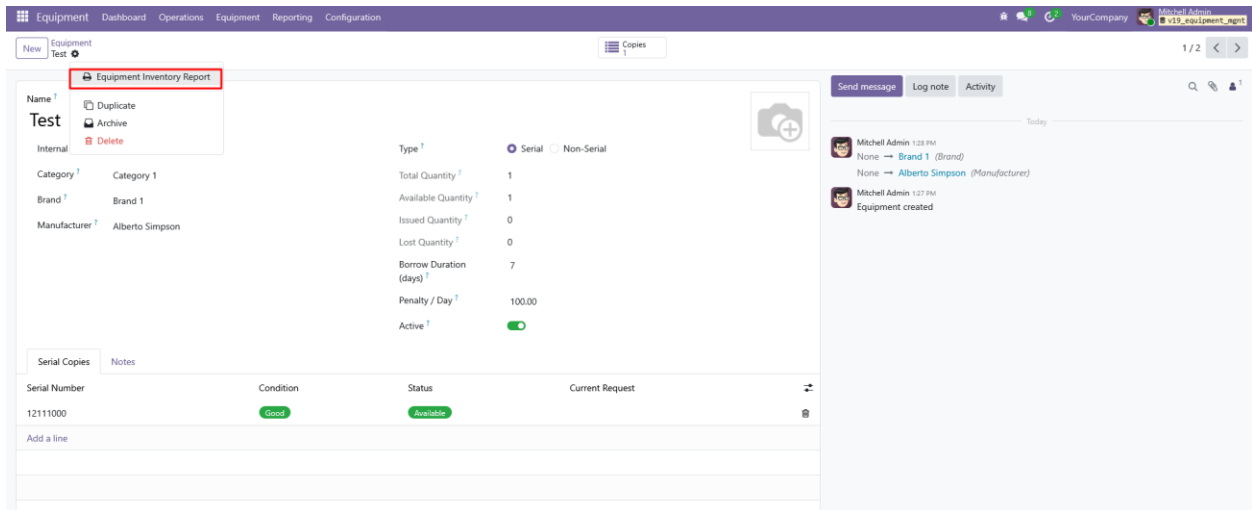


Fig 18: Equipment Management – Equipment Inventory Report for single Equipment

Method 2: Print the Inventory Report for All Equipment:

- Use this option to generate a consolidated inventory report for all equipment records.
- Navigate to Equipment -> Reporting -> click on Inventory Report (PDF)

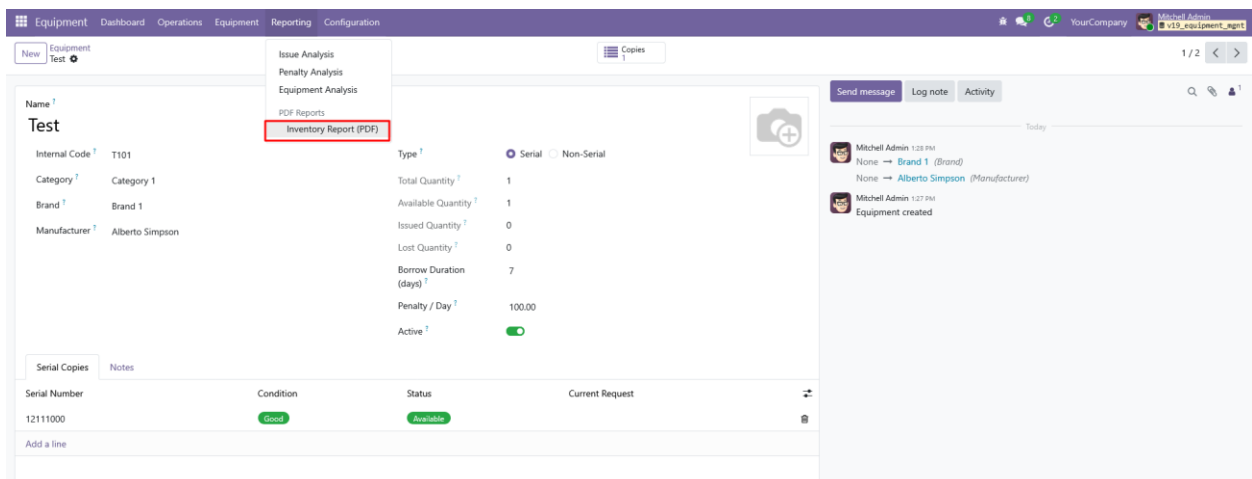


Fig 19: Equipment Management – Equipment Inventory Report for all Equipment Records

5. Brief Description

The Equipment Management module automates equipment inventory and lending in Odoo 19. It covers master data, serial and non-serial stock, approval-based issuing, flexible returns (partial and split conditions), repair of damaged serials, lost write-off, overdue monitoring, penalties, dashboard KPIs, and reporting.

Users create Issue Requests; managers Approve and can Close. At Issue, only Available + Good serials (or sufficient non-serial Available qty) are allocated. On return: Good returns to Available; Damaged serials go to Maintenance until Mark as Repaired; Lost sets Status and Condition to Lost.

Overdue detection and Penalty / Day drive late fees. Close is allowed only after full return and paid penalties. Cancel is blocked for Issued, Returned, and Closed requests.

Step-by-Step End-to-End Process:

1. Install the module and assign Equipment User / Equipment Manager rights.
2. Configure Categories, Brands, and Manufacturers.
3. Create Equipment (Serial or Non-Serial) with Code, Borrow Duration, Penalty / Day.
4. For Serial equipment, create Serial Copies (Available + Good).
5. Create Issue Request, add lines, optionally select serials, then Submit.
6. Manager Approves, then Issue Equipment.
7. Return via wizard; use multiple lines to split Good/Damaged/Lost or return partially.
8. For Damaged serials, Manager clicks Mark as Repaired after repair.
9. For Lost, return as Lost or use Mark as Lost (Status + Condition = Lost).
10. Mark penalties Paid if late, then Manager Closes the request.
11. Use Dashboard, Overdue, and Reporting/PDF reports for monitoring.

Critical Rules:

- Cancel is not allowed for Issued, Returned, or Closed requests.
- Same serial cannot appear on two return lines; already-returned serials are hidden next time.
- Non-serial Available/Issued update immediately on partial Good return.
- Damaged serials are not issuable until Mark as Repaired.

6. Technical Requirements / Compatible With:

- Technical Requirements: Contacts modules (standard Odoo dependencies).
- Compatible with: Odoo v19.0 Community & Enterprise Editions.

7. Changes Log / Release Notes

- Version 1.0.0: October 2026
 - Initial release.

8. Support

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