User Manual

Advanced Payment Control for Odoo v17.0

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1.   Introduction

The **Advanced Payment Control** module for **Odoo 17** is designed to transform how businesses manage their payment processes. It introduces configurable, automated workflows for each payment method, enabling organizations to streamline **sales, invoicing, and payment operations** across both backend (manual) sales and e-commerce.

By bridging **sales, accounting, and logistics**, this module ensures every order follows an automated flow tailored to the selected payment method. Whether you need to support classic invoicing, prepayment, or custom payment workflows, the module delivers the flexibility and control needed for an efficient, error-free **order-to-cash cycle**.

2.   Key Features

- **Payment Method Automation** – Define workflows (order confirmation, invoice creation, payment registration, etc.) for each payment method, covering both backend and e-commerce sales.

- **New Payment Providers** – Introduces *Invoice* (post-delivery payment) and *Payment in Advance* (pre-delivery payment), suitable for B2B and B2C models.

- **Integration** – Links payment logic to sale orders, invoices, partners, and stock pickings for consistent enforcement.

- **Automation** – Automatically creates, validates, sends invoices, and registers payments based on workflow rules, reducing manual effort.

- **E-commerce Support** – Configure workflows specifically for website sales, ensuring proper payment handling during online checkout.

- **Payment Status Tracking** – Real-time status updates control stock release so goods are shipped only when payment conditions are satisfied.

- **Queue Job Integration –** Enhances performance by providing a faster, smoother user experience while ensuring efficient management of system resources.

3.   Installation

Follow these steps carefully to install the module:

1.   **Upload the Module**

- Download the module ZIP file from the provider.

- Extract the ZIP file on your local computer.

- Copy the entire folder to your Odoo **custom addons directory**. Example path: */odoo/custom/addons/*

- Ensure proper file permissions.

2.   **Update the Apps List**

- Log in to Odoo with an Administrator account.

- Navigate to **Apps** from the main menu.

- In the Apps dashboard, click **Update Apps List** (If you don't see this button, enable **Developer Mode** from Settings → General Settings → Developer Tools).

- In the pop-up, click **Update** to refresh the list of available apps.

3.   **Install the Module**

- In the **Apps** search bar, type: *Advanced Payment Control*

- The module will appear in the search results.

- Click the **Install** button.

- Wait for Odoo to finish installing and updating menus.
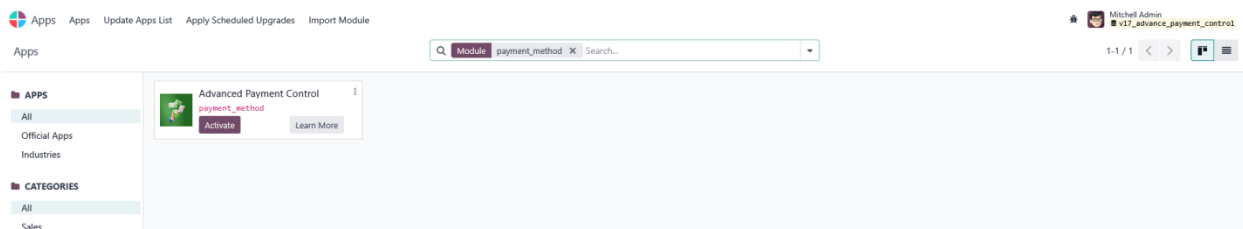
- The module is now active.

Figure 1: Plugin Install Page

4.   Odoo Advanced Payment – Configuration & Usage

4.1 Global Settings

- Navigate to **Settings →Invoicing→ Default Payment Method**.
- Select a **default payment method** to be applied automatically when new sales orders are created.
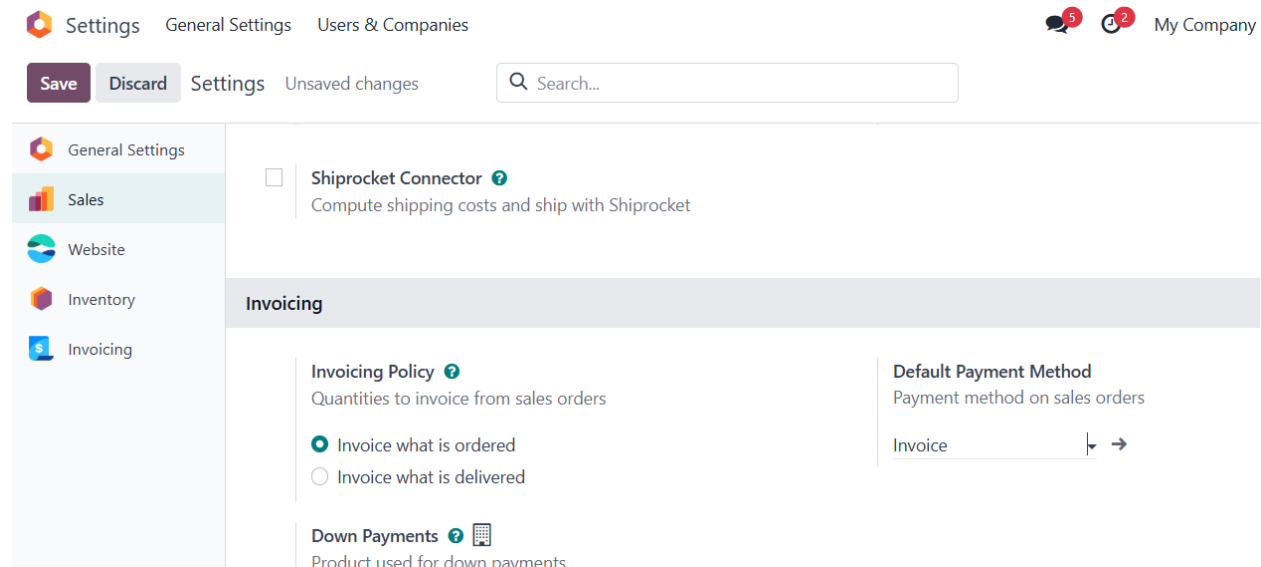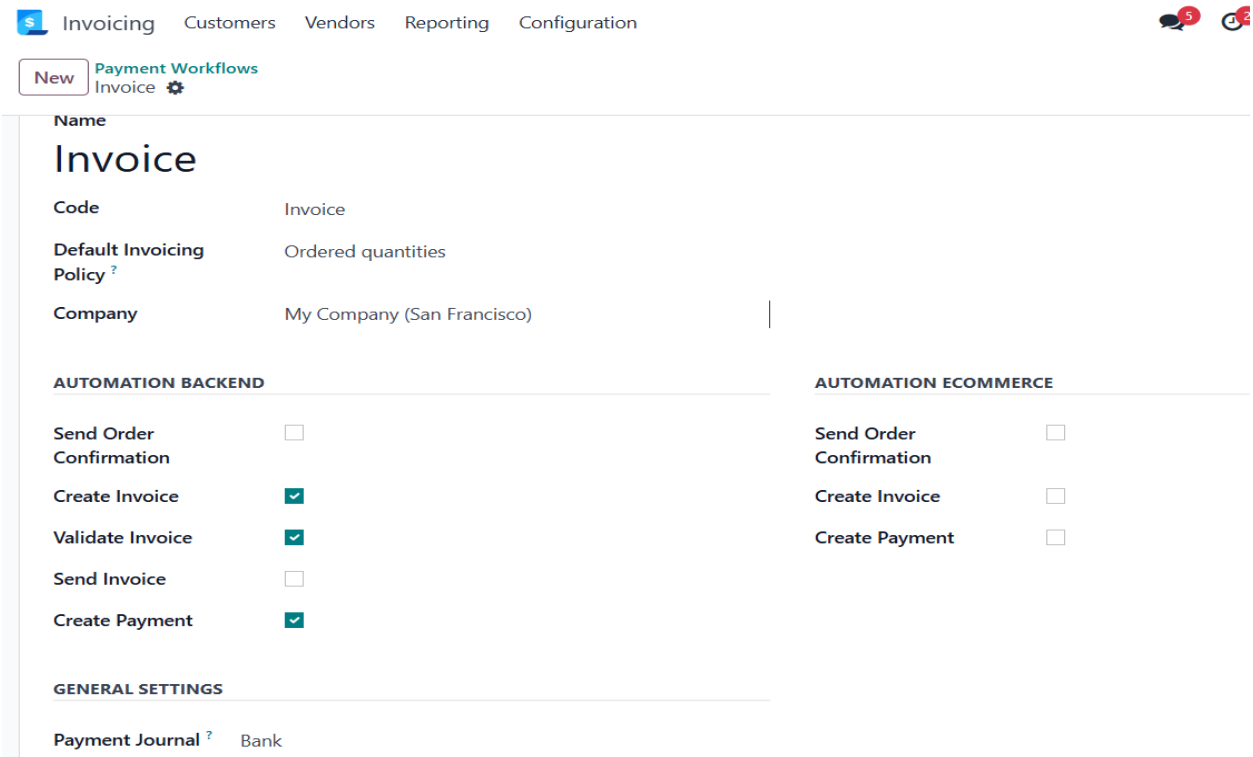- Save changes.

Figure 2: Global Payment Method Configuration

4.2 Create Payment Workflows

- Go to **Invoicing → Configuration → Payment Workflows**.
- Click **Create**.
- Fill in the details:
    - **Name**: e.g., Invoice or Payment in Advance
    - **Code**: Internal code for the workflow
    - **Company**: Select applicable company (for multi-company setups)

- o **Payment Journal**: Choose the journal to record transactions (e.g., Cash, Bank, Online Payment)

- Configure workflow steps (check the boxes for actions like Create Invoice, Validate Invoice, Send Invoice, Create Payment).

- Save the workflow.

Invoicing   Customers   Vendors   Reporting   Configuration

Payment Workflows
New   Invoice ⚙

Name

Invoice

Code	Invoice
Default Invoicing Policy ?	Ordered quantities
Company	My Company (San Francisco)

AUTOMATION BACKEND

		AUTOMATION ECOMMERCE	
Send Order Confirmation	☐	Send Order Confirmation	☐
Create Invoice	✔	Create Invoice	☐
Validate Invoice	✔	Create Payment	☐
Send Invoice	☐		
Create Payment	✔		

GENERAL SETTINGS

Payment Journal ?   Bank

Figure 3: Payment Workflow Setup

4.3 Sale Order Integration

When creating a Sale Order, you can attach a workflow that automates invoicing and payments.

Steps:

1. Navigate to **Sales → New Sale Order**.

2. Add customer and product details.

3. In the **Payment Workflow** field, select the desired workflow.

4. Confirm the order.

Based on the workflow rules, Odoo will:

- Send confirmation email.

- Create and validate an invoice.

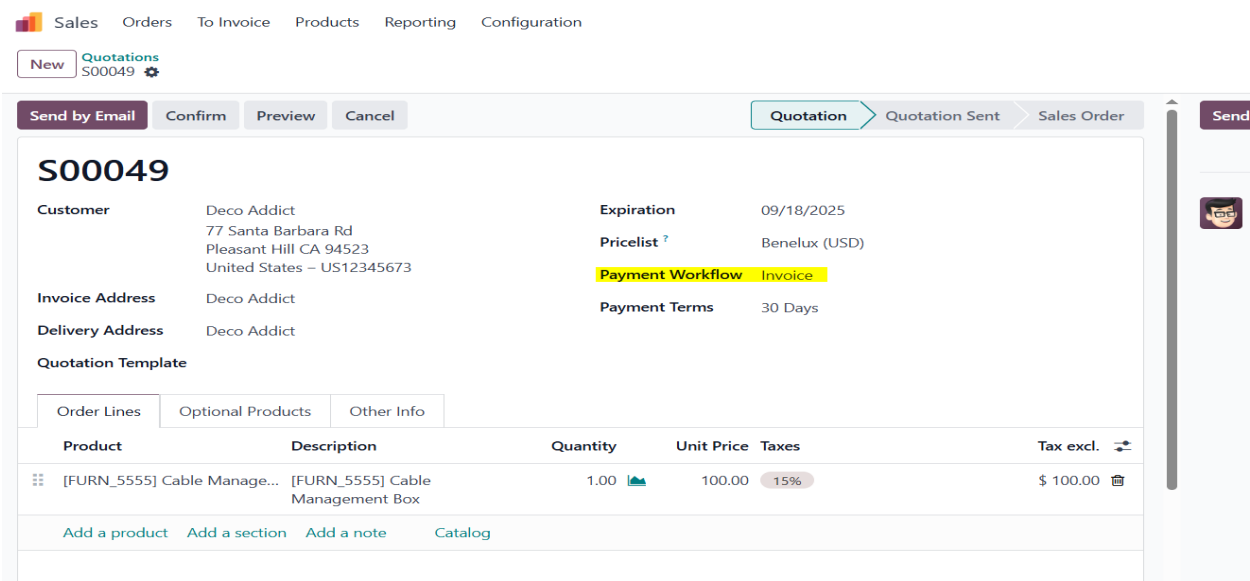- Send the invoice to the customer.

- Register a payment (if configured).

Figure 4: Sale Order Integration

4.3.1 Send Order Confirmation

If "Send Order Confirmation" is enabled:

- After confirming the sale order, Odoo automatically sends an email confirmation to the customer.

- Customer receives the order details instantly.
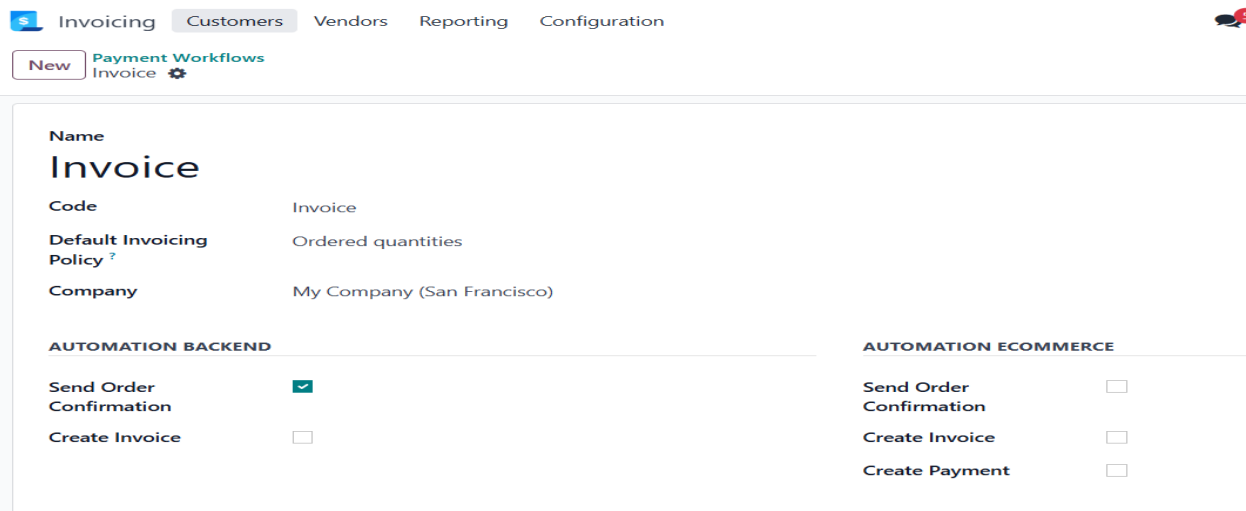
Figure 5: Order Confirmation Configuration
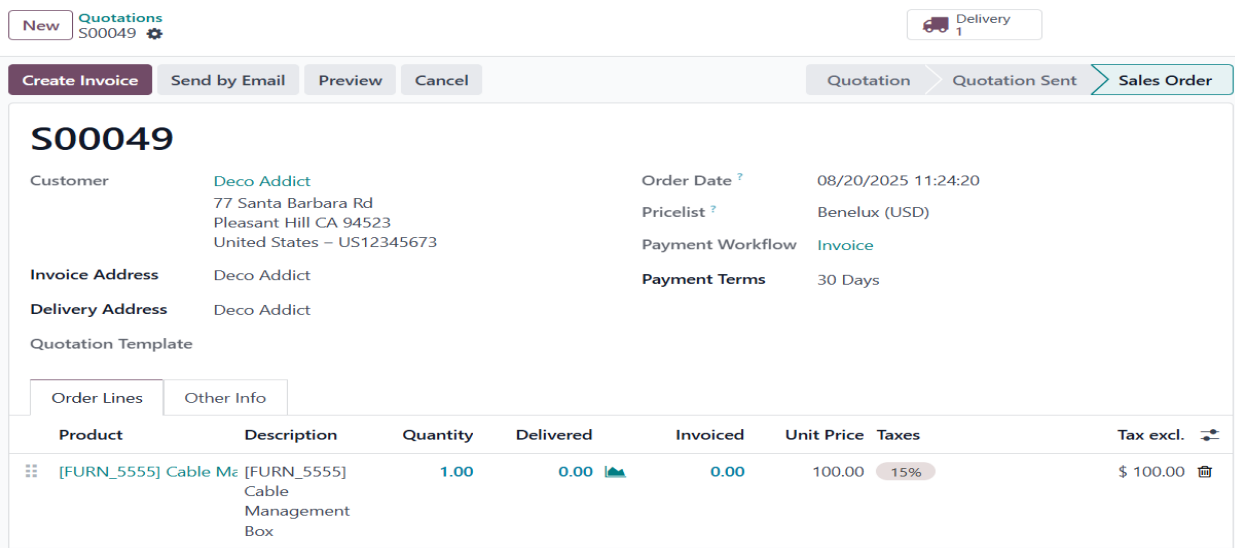
Figure 6: Sale Order Email Confirmation

My Company (San Francisco) Order (Ref S00049)

MA Mitchell Admin
To: ✅

Wed 20/08/2025 11:24

📄 Order - S00049.pdf
389 KB

View Sales Order **S00049**
$ 115.00

Hello,

Your order **S00049** amounting in **$ 115.00** has been confirmed.
Thank you for your trust!

Do not hesitate to contact us if you have any questions.

--
Mitchell Admin
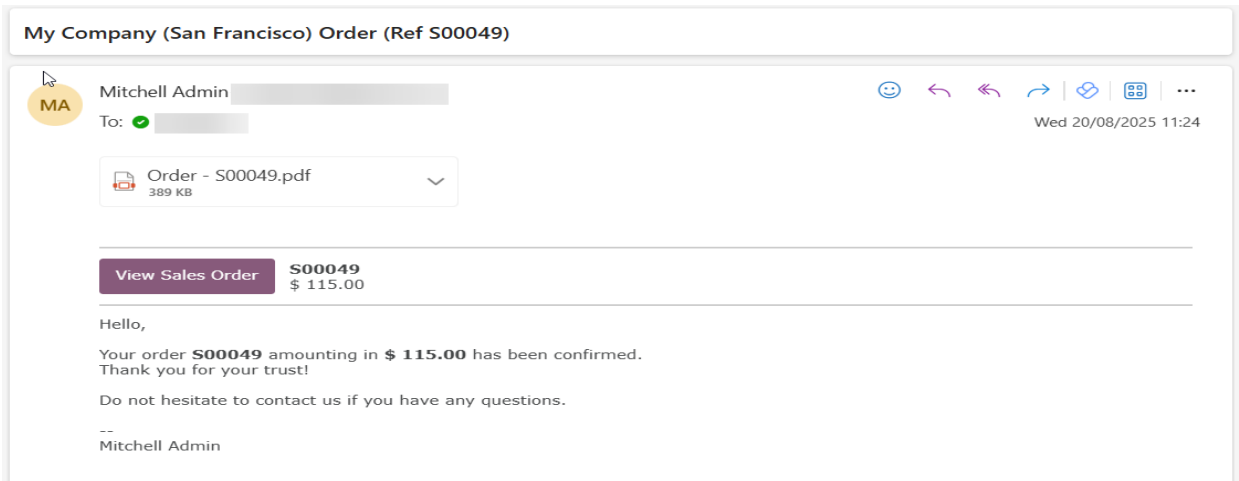
Figure 7: Order Confirmation Example Email

4.3.2 Invoice Workflow

- **Create Invoice** – System generates invoice automatically after order confirmation.
- **Validate Invoice** – Posts the invoice immediately, updating status to *Posted*.
- **Send Invoice** – System emails the invoice to the customer.

AUTOMATION BACKEND

Send Order Confirmation	☐
Create Invoice	☑
Validate Invoice	☑
Send Invoice	☑
Create Payment	☐

Figure 8: Invoice Configuration

Figure 9: Sale Order

Figure 10: Validated Invoice

4.3.3 Payment Workflow

If "Create Payment" is enabled:

- After the invoice is posted, the system automatically creates a payment entry.

- The payment is linked to the invoice and reflected in the Payments tab.

⚠ **Important:** To auto-register payments, you must enable both:
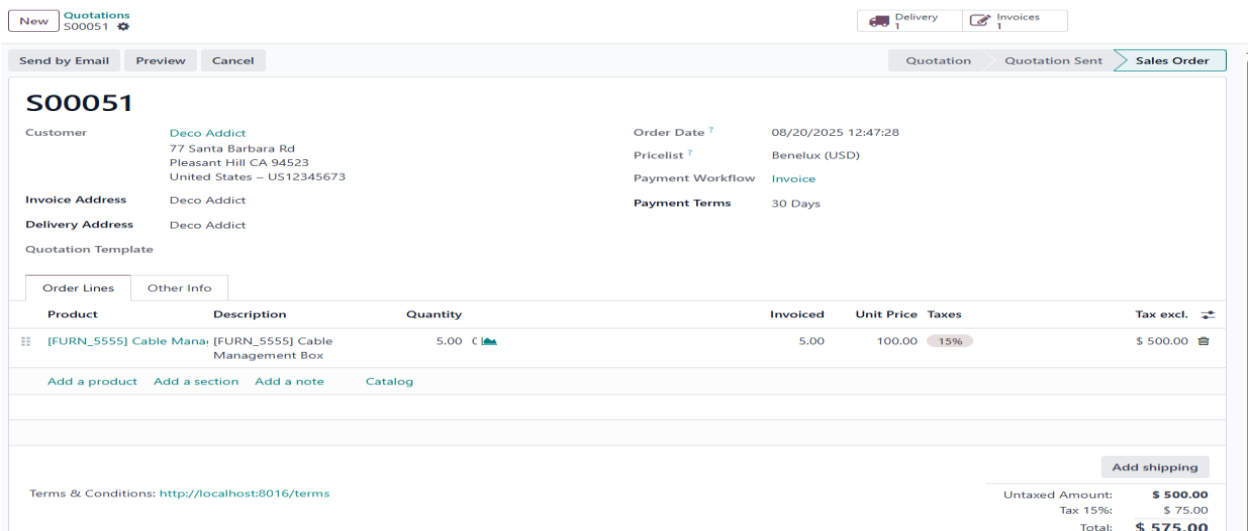
- *Create Invoice*

- *Validate Invoice*

AUTOMATION BACKEND

Send Order Confirmation	☐
Create Invoice	☑
Validate Invoice	☑
Send Invoice	☐
Create Payment	☑

GENERAL SETTINGS

Payment Journal ?   Bank

Figure 11: Payment Configuration

Figure 12: Sale Order

Figure 13: Invoice

Figure 14: Payment Record

4.4 E-Commerce Integration

For website sales, customers select a payment method during checkout. The system applies **e-commerce-specific workflows** such as *ecom_send_order_confirmation, ecom_create_invoice, and ecom_create_payment.*

4.4.1 Payment Provider Setup

1. Navigate to Invoicing → Configuration → Payment Providers.

2. Select or create a provider.

3. Assign the relevant Payment Workflow.
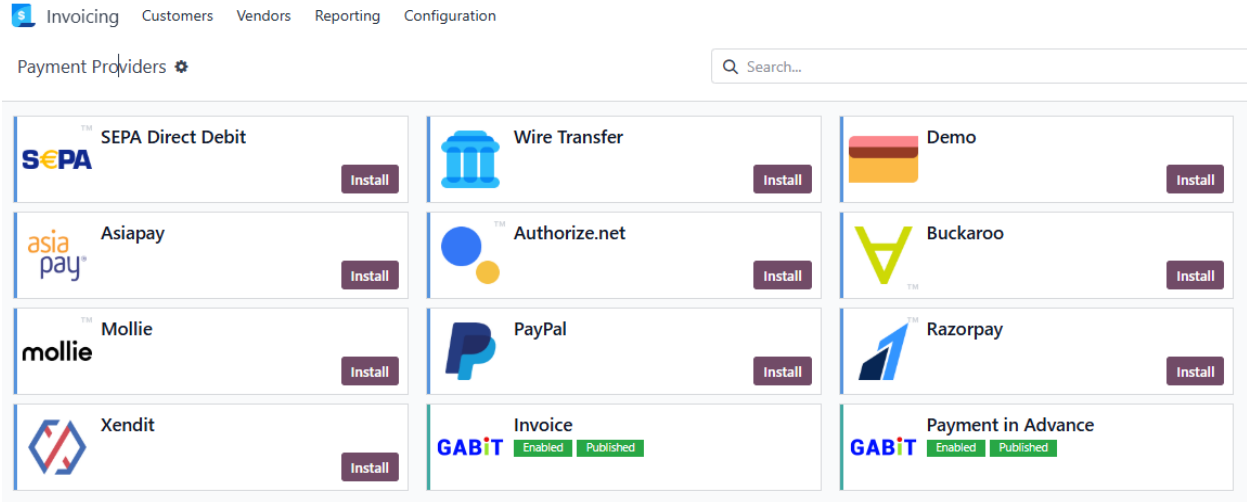
4. Save changes.
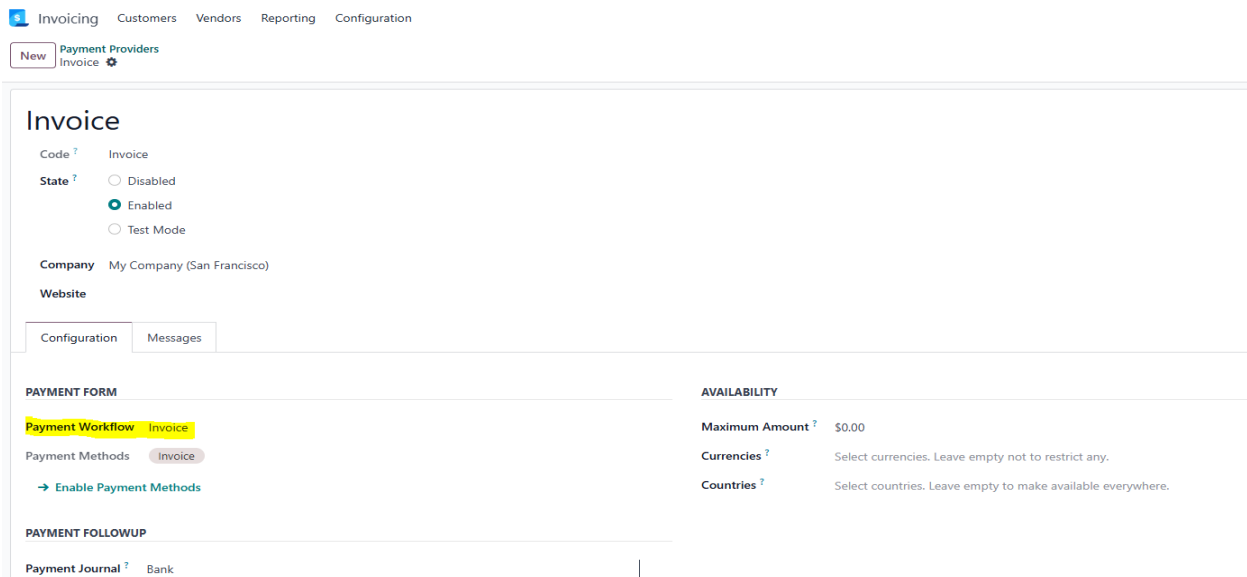

Figure 15: Payment Provider Configuration

Figure 16: Payment Provider Configuration

4.4.2 Send Order Confirmation

If enabled, an order confirmation email is sent automatically after checkout.

Figure 17: Order Confirmation Configuration

Figure 18: Sale Order Placed

My Company (San Francisco) Order (Ref S00052)

MC My Company (San Francisco)

To:

Wed 20/08/2025 14:42

ⓘ Some content in this message has been blocked because the sender isn't in your Safe senders list.

[Trust sender] [Show blocked content]

📄 Order - S00052.pdf
389 KB ⌄

[View Sales Order] **S00052**
$ 345.00

Hello,

Your order **S00052** amounting in **$ 345.00** has been confirmed.
Thank you for your trust!

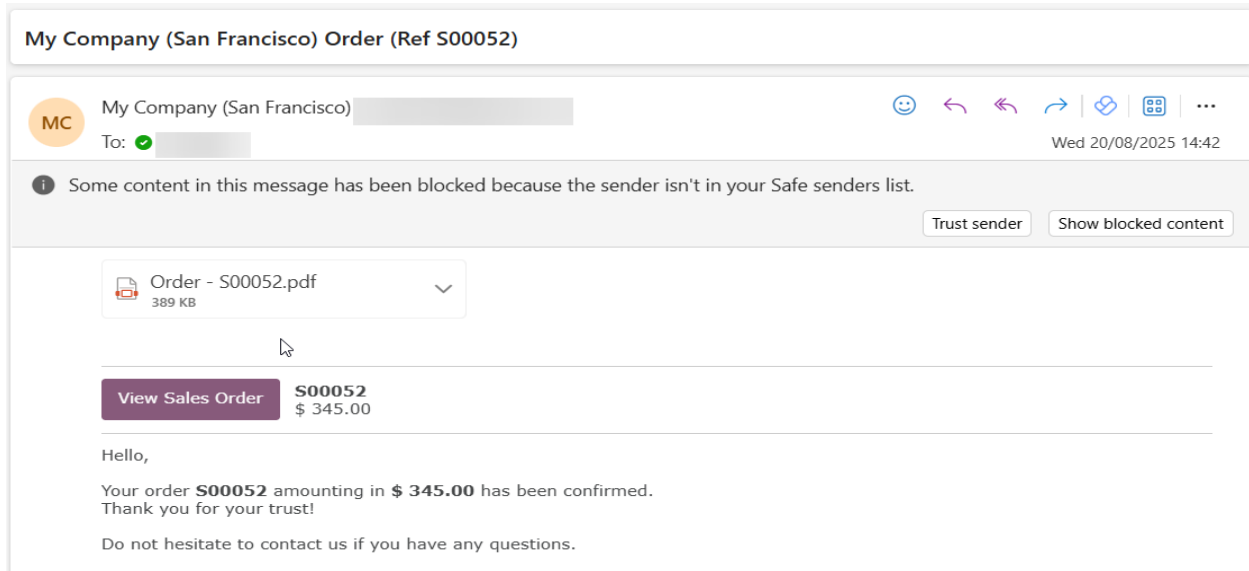Do not hesitate to contact us if you have any questions.

Figure 19: Example Email

4.4.3 Invoice Automation

- **Ecom Create Invoice** – Automatically generates invoice after order confirmation.

- **Ecom Send Invoice** – Automatically emails invoice to the customer.

AUTOMATION ECOMMERCE

Send Order Confirmation ☐

Create Invoice ☑

Send Invoice ☑

Create Payment ☐

Figure 20: Invoice Configuration

Thank you for your order.

Order S00053 ✔

Payment Information

Invoice   **Total:**   **$ 460.00**

Your order has been successfully processed. Thank you!

Billing & Shipping: 77 Santa Barbara Rd, Pleasant Hill CA 94523, United States

Figure 21: Sale Order Placed

<table>
<tr><td>Send & Print</td><td>Register Payment</td><td>Preview</td><td>Credit Note</td><td>Reset to Draft</td><td></td><td>Draft</td><td>Posted</td></tr>
</table>

You have **outstanding credits** for this customer. You can allocate them to mark this invoice as paid.

Customer Invoice

INV/2025/00008

Customer [?]	Deco Addict
	77 Santa Barbara Rd
	Pleasant Hill CA 94523
	United States – US12345673
Delivery Address [?]	Deco Addict

Invoice Date [?]   08/20/2025
Payment Reference [?]   INV/2025/00008
Payment terms [?]   30 Days
Payment Workflow [?]   Invoice

Invoice Lines   Other Info

Product	Label	Quantity	Price	Taxes	Tax excl.
[FURN_5555] Cable Management Box	[FURN_5555] Cable Management Box	4.00	100.00	15%	$ 400.00
[Delivery_007] Standard delivery	Standard delivery	1.00	0.00	15%	$ 0.00

Terms & Conditions: http://localhost:8016/terms

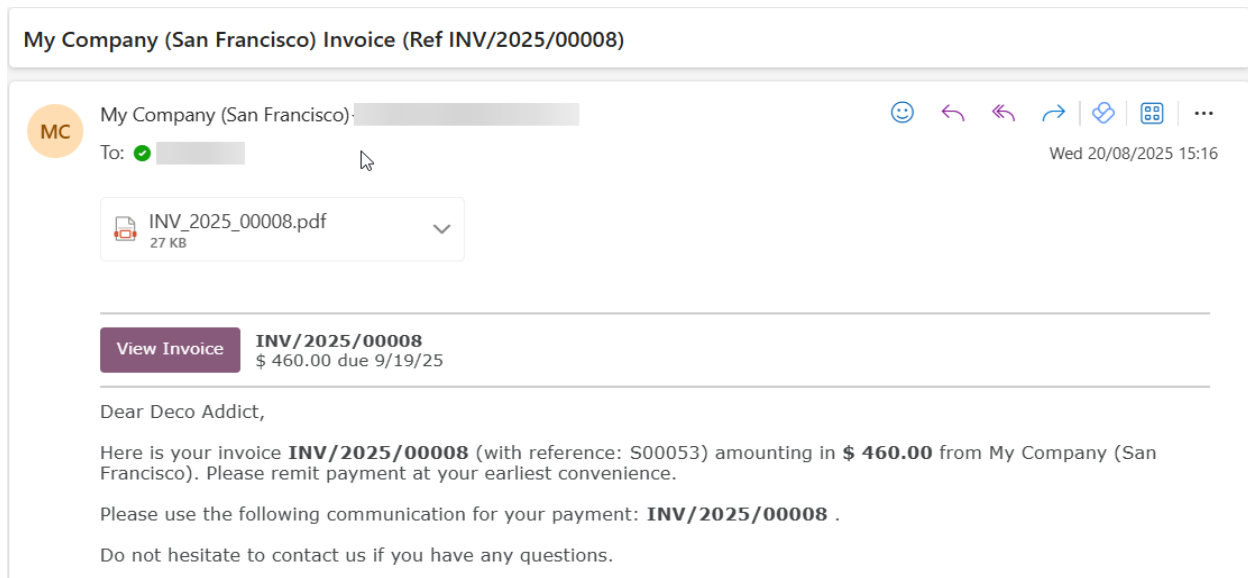|	
Untaxed Amount:	$ 400.00
Tax 15%:	$ 60.00
Total:	$ 460.00
Amount Due [?] :	$ 460.00

Figure 22: Invoice

Figure 23: Example Invoice Mail

4.4.4 Create Payment

- If **Ecom Create Payment** is enabled, Odoo automatically records a payment once the invoice is posted.

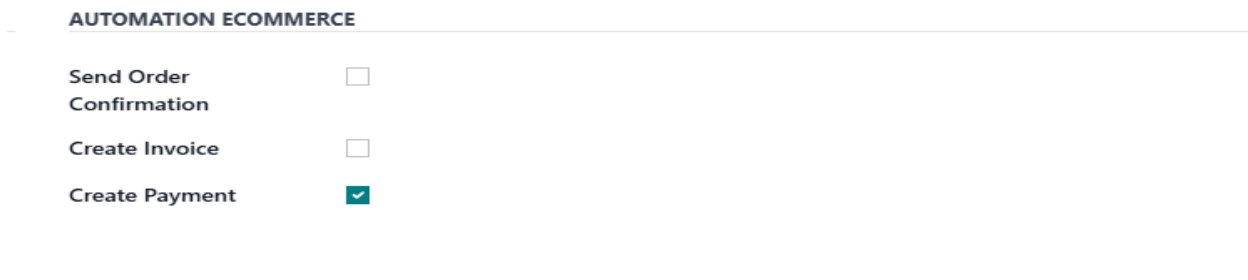- For manual workflows, the payment is linked once invoice is confirmed.

Figure 24: Ecom Payment configuration

Thank you for your order.
Order S00055 ✅

Payment Information

Invoice   **Total:**   **$ 460.00**

Your order has been successfully processed. Thank you!

Billing & Shipping: 77 Santa Barbara Rd, Pleasant Hill CA 94523, United States
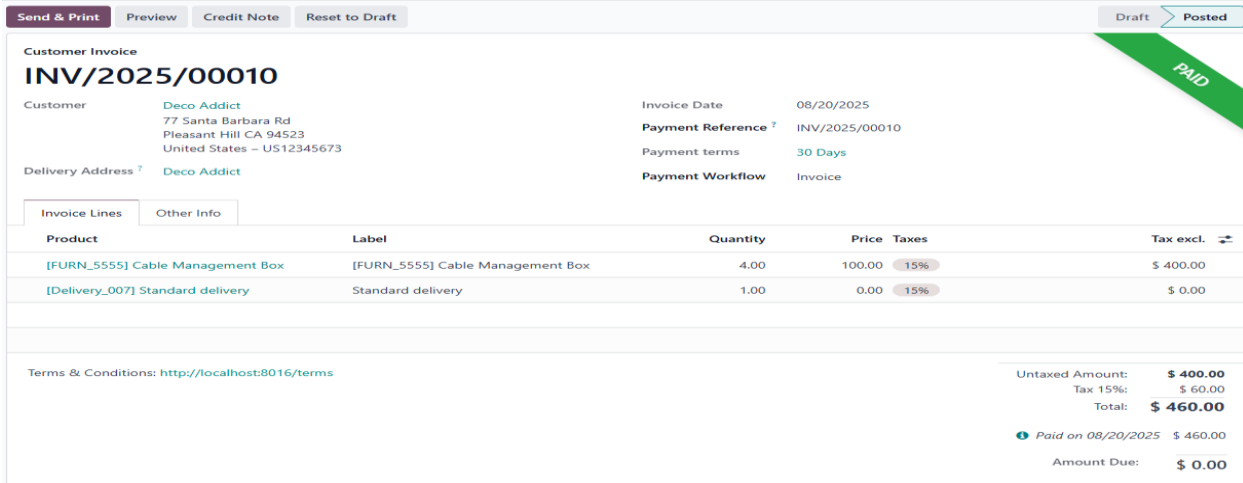
🖨 Print

Figure 25: Sale Order Placed

New | Customer Payments
PBNK1/2025/00005 ⚙

Reset To Draft   Draft ⟩ Posted

PBNK1/2025/00005

Internal Transfer ? ☐	Journal ?	Bank
Payment Type ? ○ Send ⦿ Receive	Payment Method ?	Invoice
Customer ? Deco Addict	Saved Payment Token ?	
Amount ? $ 460.00	Payment Transaction ?	S00055
Date ? 08/20/2025		
Memo ? S00055 - Deco Addict -		

Figure 26: Customer Payment

Figure 27: Paid Invoice

4.5 Customer configuration

You can assign a default payment workflow per customer.

Steps:

1. Go to **Customers → Select Customer**.

2. Open **Sales & Purchase tab**.

3. Select the **Payment Workflow**.

4. Save changes.

➡️ Next time you create a sale order for this customer, the workflow will be applied automatically.

○ Individual ● Company

Deco Addict

Address 77 Santa Barbara Rd
Street 2...
Pleasant Hill   California (US)   94523
United States

Tax ID ? US12345673

Phone (603)-996-3829

Mobile

Email ranjith.an@pitsolutions.com

Website http://www.deco-addict.com

Tags [Vendor / Desk Manufacturers ✕]

| Contacts & Addresses | **Sales & Purchase** | Invoicing | Internal Notes |

SALES

Salesperson ?

Sales Team ?

Payment Workflow   Invoice

Payment Terms ?   30 Days

Pricelist ?   Benelux (USD)

PURCHASE

Payment Terms ?

Payment Method ?

Figure 28: Customer Configuration

| Send by Email | Confirm | Preview | Cancel | **Quotation** ⟩ Quotation Sent ⟩ Sales Order

S00061

Customer   Deco Addict
77 Santa Barbara Rd
Pleasant Hill CA 94523
United States – US12345673

Invoice Address   Deco Addict

Delivery Address   Deco Addict

Quotation Template

Expiration   09/19/2025

Quotation Date ?   08/20/2025 18:09:07

Pricelist ?   Benelux (USD)

Payment Workflow   Invoice

Payment Terms   30 Days

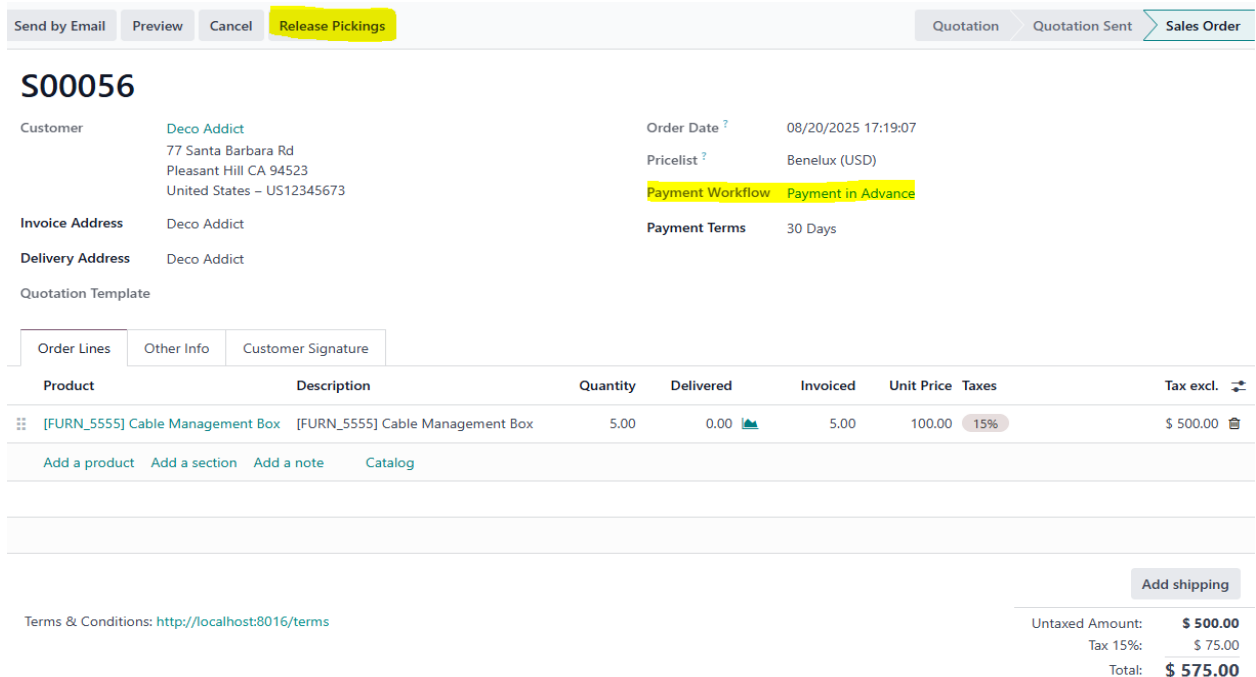*Figure 29: Auto Payment Workflow Mapped*

4.6 Payment in Advance Workflow

The "Payment in Advance" (PIA) payment method is designed for scenarios where you want to ensure that payment is received before goods or services are delivered. This is common in B2C, high-value, or custom order situations, and is fully supported in both backend and e-commerce (website) flows by the module.

Steps:

1. Create a **Sale Order**.

2. In **Payment Workflow**, select *Payment in Advance*.

3. Confirm the order.

4. Odoo will generate the invoice.

5. Delivery order status changes to **Waiting Payment**.

6. Once the invoice is paid, the system releases the delivery automatically.

➡️ Alternatively, you can use the **Release Picking** button to manually release delivery if needed.

Figure 30: Sale Order

Figure 31: Delivery for Payment Advance

5.   Queue Job Automation

The Queue Job feature enables payment operations in Odoo to run asynchronously in the background using the **Queue Job** module. Instead of making users wait for transactions to complete, tasks are processed by dedicated workers and safely stored in the database. This approach enhances performance, delivering a faster and smoother user experience while optimizing system resource usage.

It also improves reliability through automatic retries in case of failures, clear monitoring of job status, and prioritization of critical tasks. Advanced capabilities such as scheduling, delayed execution, and job dependencies provide additional flexibility for managing complex processes efficiently.

5.1 Post Processing with Queue Job

To enable the **Queue Job** feature, navigate to:

Settings > General Settings > Website > Invoicing section and set **"Use Queue Job for Post Processing"** to **Yes**.
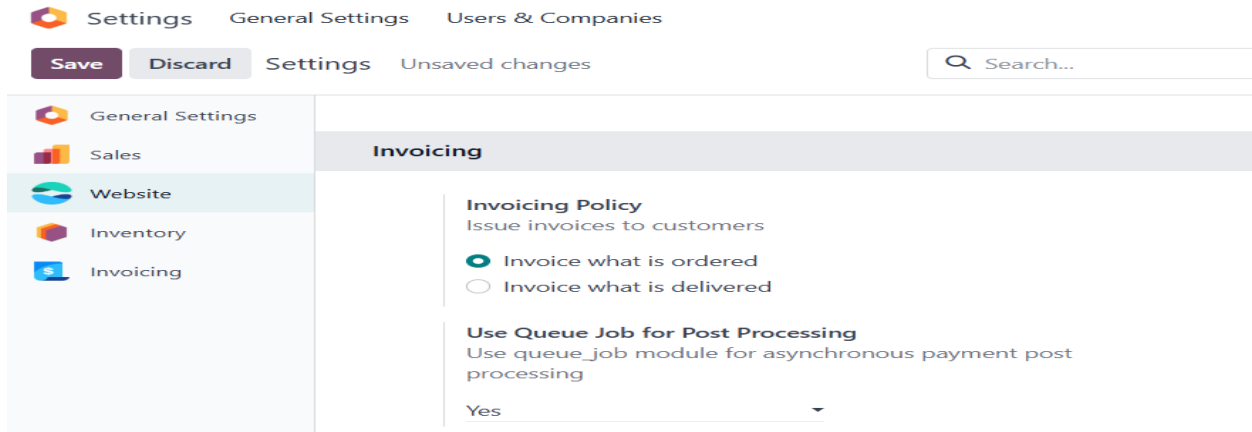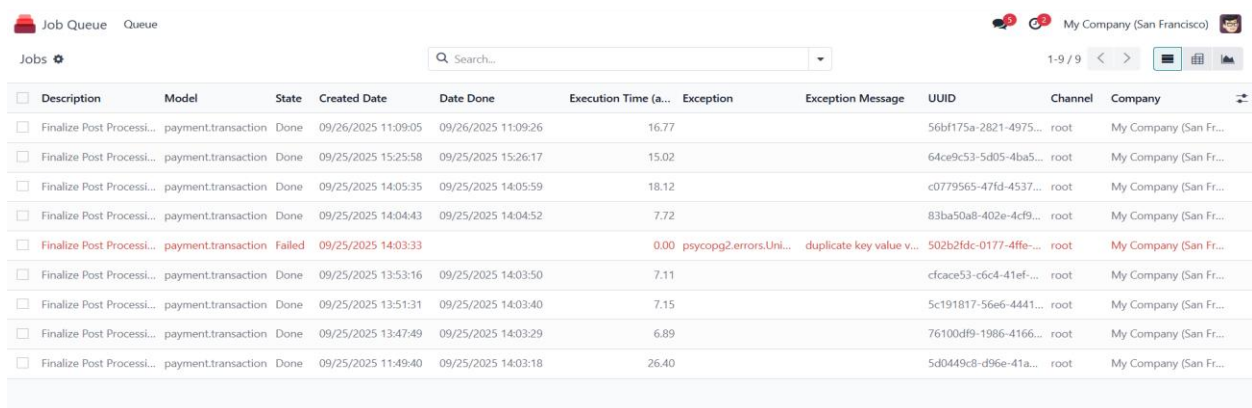

Figure 32: Configuration - Enable Queue Job

When a customer places an order and completes a transaction in eCommerce, the process runs smoothly and quickly. The **Queue Job** feature assigns the task to the background job queue, which starts automatically and completes the processing without interrupting the user experience.

Figure 33: Queue Job List

Figure 34: E-commerce Sale Order

Figure 35: Initiating the Queue Job Process

Job Queue   Queue

Jobs
Finalize Post Processing S00054 ⚙
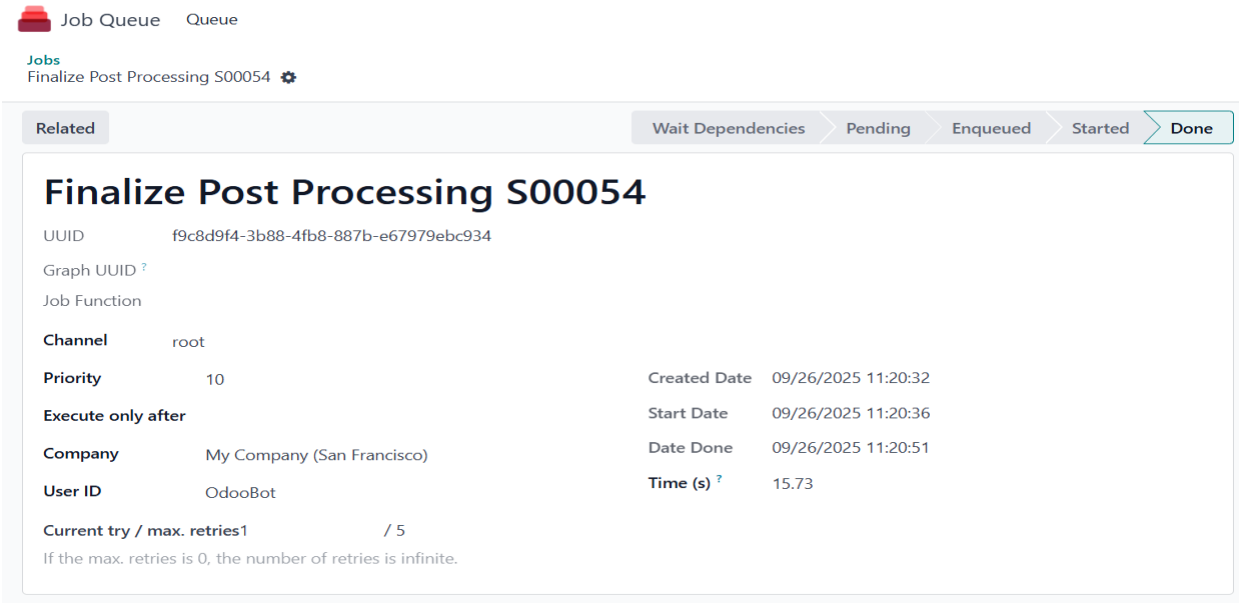
| Related | | Wait Dependencies | Pending | Enqueued | Started | Done |

Finalize Post Processing S00054
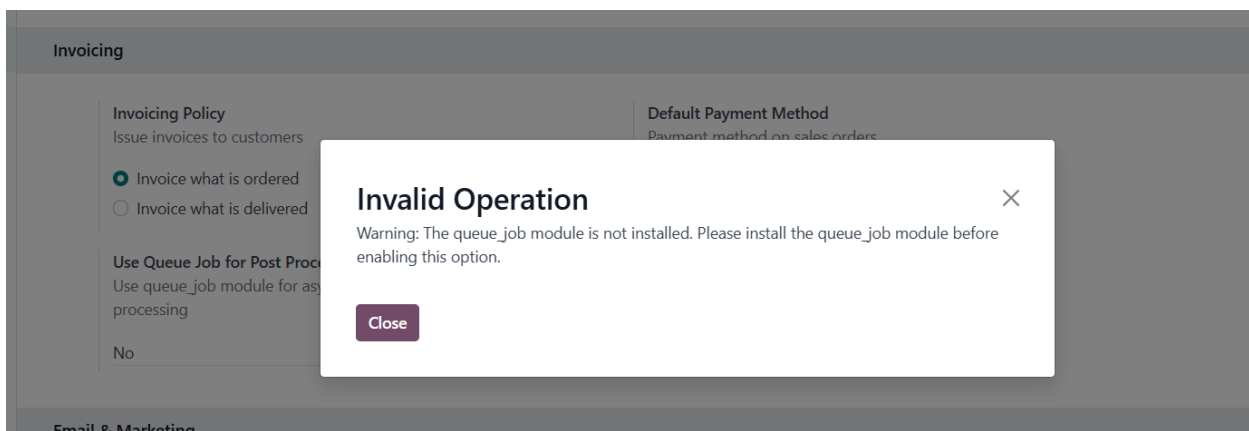
UUID	f9c8d9f4-3b88-4fb8-887b-e67979ebc934			
Graph UUID ?				
Job Function				
Channel	root			
Priority	10	**Created Date**	09/26/2025 11:20:32	
Execute only after		**Start Date**	09/26/2025 11:20:36	
Company	My Company (San Francisco)	**Date Done**	09/26/2025 11:20:51	
User ID	OdooBot	**Time (s) ?**	15.73	
Current try / max. retries 1	/ 5			

If the max. retries is 0, the number of retries is infinite.

Figure 36: Done Queue Job Process

- **Note:** To enable the Queue Job process, you must install the dependency module *queue_job*.
  https://apps.odoo.com/apps/modules/17.0/queue_job
- A warning will appear when configuring Queue Job settings if the module is not installed.
- Add the following parameters to your configuration file:
  queue_job__no_delay = True
  server_wide_modules = web,queue_job

Invoicing

Invoicing Policy
Issue invoices to customers

● Invoice what is ordered
○ Invoice what is delivered

Default Payment Method
Payment method on sales orders

Invalid Operation   ✕
Warning: The queue_job module is not installed. Please install the queue_job module before enabling this option.

Close

Use Queue Job for Post Proc
Use queue_job module for as~~y~~ processing

No

Email & Marketing

Figure 37: Validation for the Queue Job Installation

6.   Technical Requirements & Compatibility

- **Technical Requirements**:

  o Odoo module: *account_payment, website_sale_stock, sale_management* (must be installed).

  o queue_job - if required the Post Processing with Queue Job

- **Compatible With:**

  o Odoo Community & Enterprise Edition v17.0

7.   Change Log / Release Notes

- **Version 1.1.0** – October 2025
  - o Added support for post-processing using queue jobs.

- **Version 1.0.0** – September 2025
  - o Initial release.

8.   Support

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