



User Manual

Advanced Payment Control for Odoo v19.0

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1. Introduction

The **Advanced Payment Control** module for **Odoo 19** 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.

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.

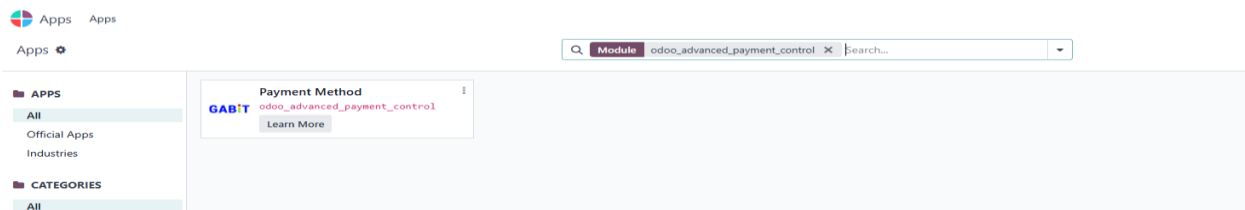


Figure 1: Plugin Install Page

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.

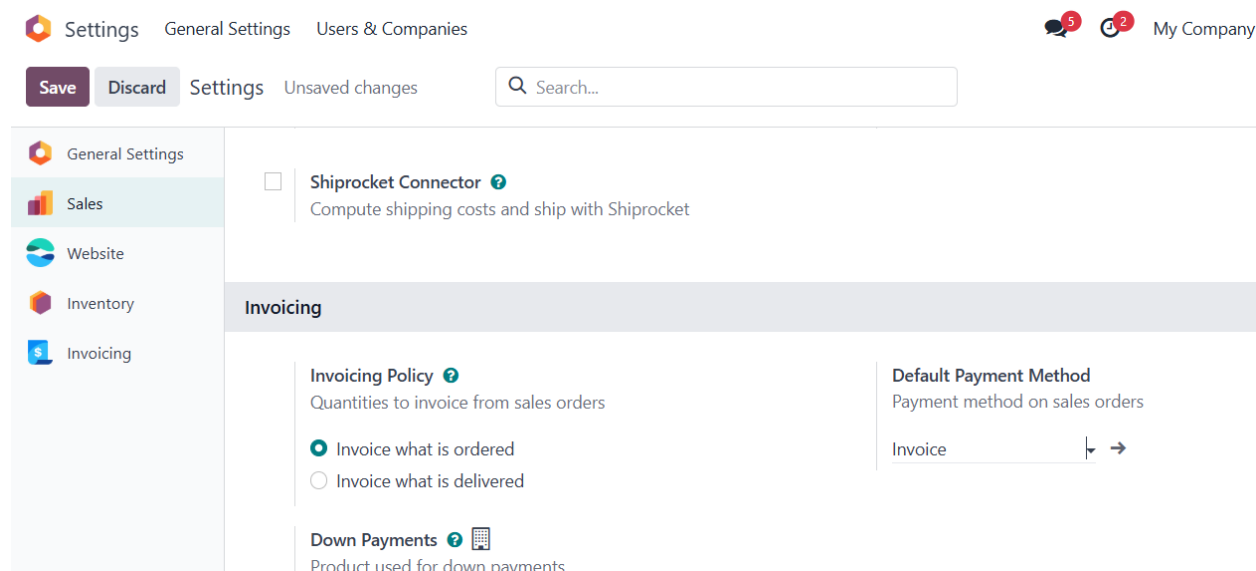


Figure 2: Global Payment Method Configuration

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)

- **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

New
Payment Workflows
Invoice

Name
Invoice

Code
Invoice

Default Invoicing Policy ?
Ordered quantities

Company
My Company (San Francisco)

AUTOMATION BACKEND

Send Order Confirmation

☐

Create Invoice

☒

Validate Invoice

☒

Send Invoice

☐

Create Payment

☒

GENERAL SETTINGS

Payment Journal ? Bank

AUTOMATION ECOMMERCE

Send Order Confirmation

☐

Create Invoice

☐

Create Payment

☐

Figure 3: Payment Workflow Setup

4.3 Sale Order Integration

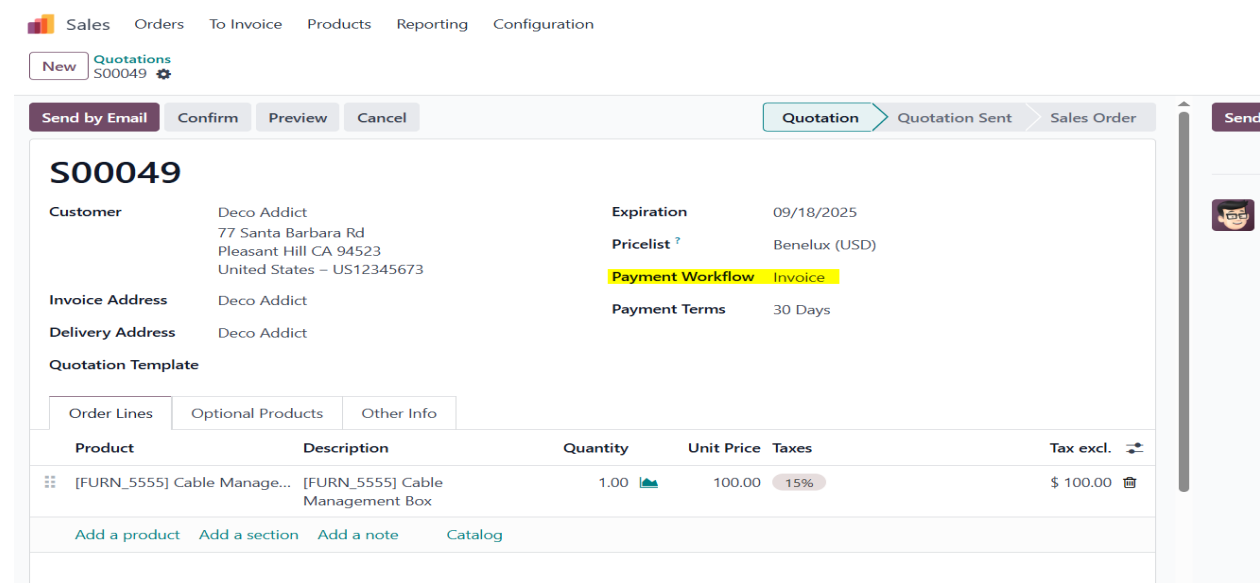
When creating a Sale Order, you can attach a workflow that automates invoicing and payments.

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).



The screenshot shows the Odoo Sales Order form for quotation S00049. The form is titled "S00049" and includes a "New" button. The top navigation bar shows "Sales" as the active menu. The form has tabs for "Send by Email", "Confirm", "Preview", and "Cancel". The "Quotation" tab is selected, and the "Quotation Sent" and "Sales Order" tabs are also visible. The form contains the following information:

- Customer:** Deco Addict, 77 Santa Barbara Rd, Pleasant Hill CA 94523, United States – US12345673
- Expiration:** 09/18/2025
- Pricelist:** Benelux (USD)
- Payment Workflow:** Invoice (highlighted in yellow)
- Payment Terms:** 30 Days
- Invoice Address:** Deco Addict
- Delivery Address:** Deco Addict
- Quotation Template:** Order Lines, Optional Products, Other Info

The "Order Lines" tab is selected, showing a table with the following data:

Product	Description	Quantity	Unit Price	Taxes	Tax excl.
[FURN_5555] Cable Manage...	[FURN_5555] Cable Management Box	1.00	100.00	15%	\$ 100.00

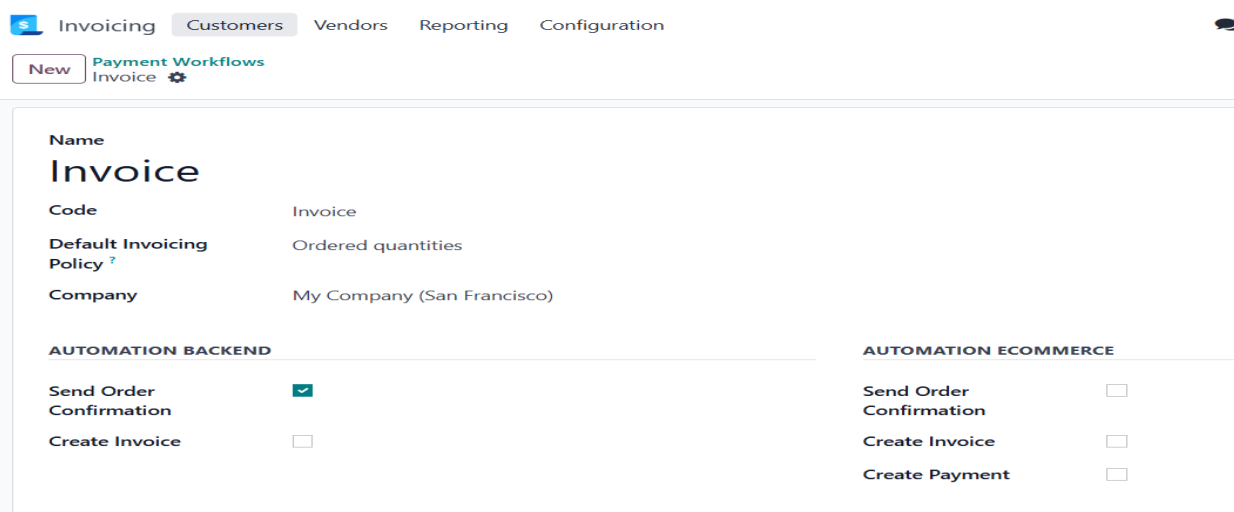
Below the table, there are links to "Add a product", "Add a section", "Add a note", and "Catalog".

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.



Navigation: Invoicing Customers Vendors Reporting Configuration

New **Payment Workflows** Invoice ⚙️

Name
Invoice

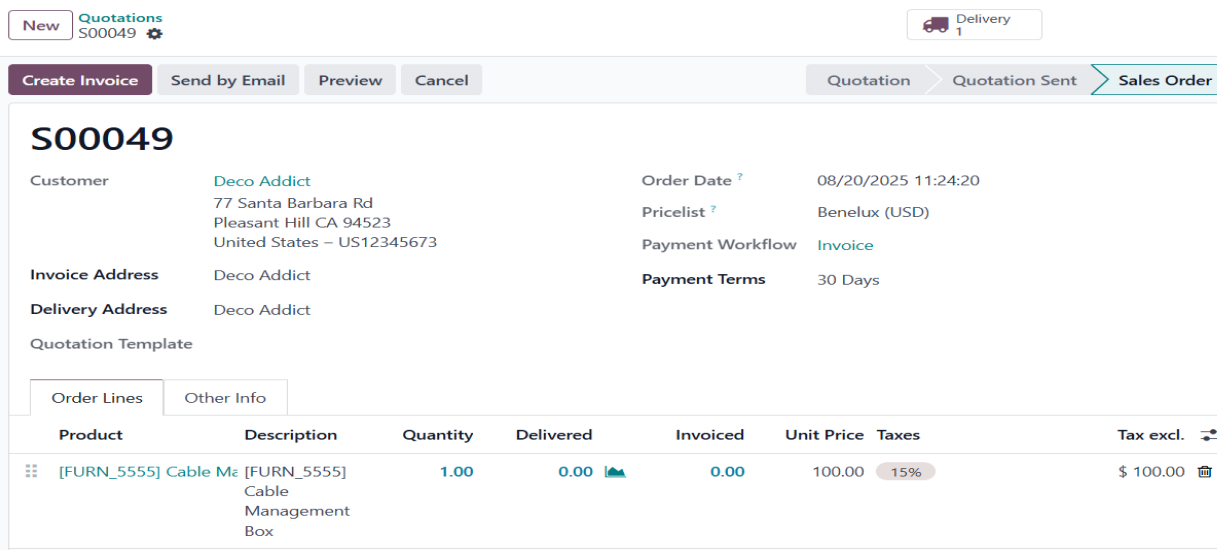
Code Invoice

Default Invoicing Policy ? Ordered quantities

Company My Company (San Francisco)

AUTOMATION BACKEND		AUTOMATION ECOMMERCE	
Send Order Confirmation	<input checked="" type="checkbox"/>	Send Order Confirmation	<input type="checkbox"/>
Create Invoice	<input type="checkbox"/>	Create Invoice	<input type="checkbox"/>
		Create Payment	<input type="checkbox"/>

Figure 5: Order Confirmation Configuration



New **Quotations** S00049 ⚙️ Delivery 1

Create Invoice Send by Email Preview Cancel Quotation Quotation Sent Sales Order

S00049

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

Order Date ? 08/20/2025 11:24:20

Pricelist ? Benelux (USD)

Payment Workflow Invoice

Payment Terms 30 Days

Invoice Address Deco Addict

Delivery Address Deco Addict

Quotation Template

Order Lines Other Info

Product	Description	Quantity	Delivered	Invoiced	Unit Price	Taxes	Tax excl.
[FURN_5555] Cable Management Box	[FURN_5555] Cable Management Box	1.00	0.00	0.00	100.00	15%	\$ 100.00

Figure 6: Sale Order Email Confirmation

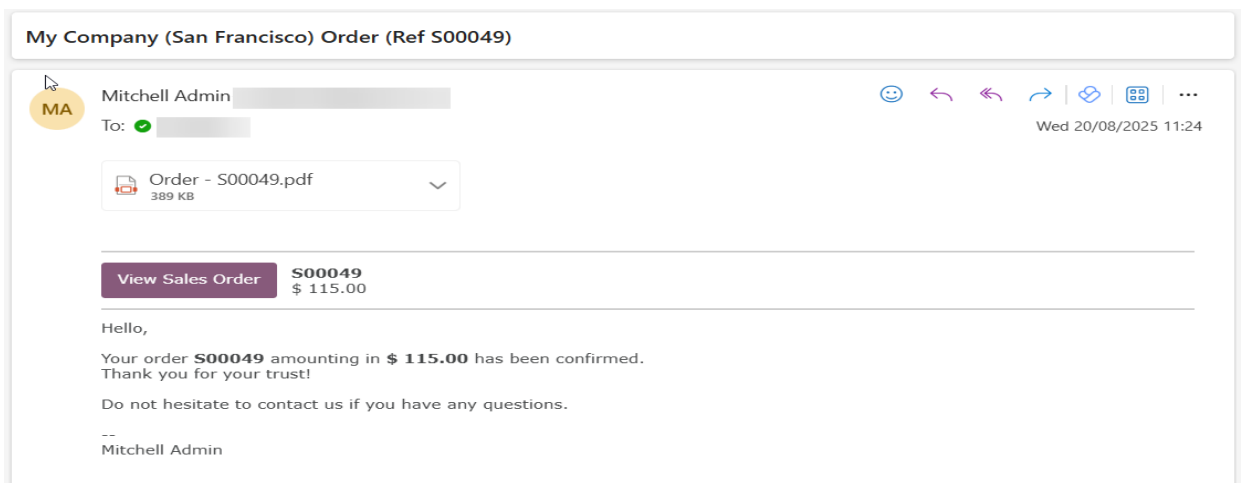


Figure 7: Order Confirmation Example Email

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	<input type="checkbox"/>
Create Invoice	<input checked="" type="checkbox"/>
Validate Invoice	<input checked="" type="checkbox"/>
Send Invoice	<input checked="" type="checkbox"/>
Create Payment	<input type="checkbox"/>

Figure 8: Invoice Configuration

Sales Orders To Invoice Products Reporting Configuration

New Quotations S00050

Delivery 1 Invoices 1

Send by Email Preview Cancel Quotation Quotation Sent Sales Order

S00050

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

Order Date: 08/20/2025 12:08:32
Pricelist: Benelux (USD)
Payment Workflow: Invoice
Payment Terms: 30 Days

Invoice Address: Deco Addict
Delivery Address: Deco Addict

Quotation Template

Order Lines Other Info

Product	Description	Quantity	Invoiced	Unit Price	Taxes	Tax excl.
[FURN_5555] Cable Mana	[FURN_5555] Cable Management Box	1.00	1.00	100.00	15%	\$ 100.00

Add a product Add a section Add a note Catalog

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

Add shipping

Untaxed Amount: \$ 100.00
Tax 15%: \$ 15.00
Total: \$ 115.00

Figure 9: Sale Order

Send & Print Register Payment Preview Credit Note Reset to Draft Draft Posted

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

Customer Invoice INV/2025/00006

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

Invoice Date: 08/20/2025
Payment Reference: INV/2025/00006
Payment terms: 30 Days
Payment Workflow: Invoice

Delivery Address: Deco Addict

Invoice Lines Other Info

Product	Label	Quantity	Price	Taxes	Tax excl.
[FURN_5555] Cable Management Box	[FURN_5555] Cable Management Box	1.00	100.00	15%	\$ 100.00

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

Untaxed Amount: \$ 100.00
Tax 15%: \$ 15.00
Total: \$ 115.00

Amount Due: \$ 115.00

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	<input type="checkbox"/>
Create Invoice	<input checked="" type="checkbox"/>
Validate Invoice	<input checked="" type="checkbox"/>
Send Invoice	<input type="checkbox"/>
Create Payment	<input checked="" type="checkbox"/>

GENERAL SETTINGS

Payment Journal [?](#) Bank

Figure 11: Payment Configuration

New
Quotations
S00051

Delivery 1
Invoices 1

Send by Email
Preview
Cancel

Quotation
Quotation Sent
Sales Order

S00051

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

Order Date [?](#)
08/20/2025 12:47:28

Invoice Address
Deco Addict

Pricelist [?](#)
Benelux (USD)

Delivery Address
Deco Addict

Payment Workflow
Invoice

Quotation Template

Payment Terms
30 Days

Order Lines
Other Info

Product	Description	Quantity	Invoiced	Unit Price	Taxes	Tax excl.
[FURN_5555] Cable Mana	[FURN_5555] Cable Management Box	5.00	5.00	100.00	15%	\$ 500.00

Add a product
Add a section
Add a note
Catalog

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

Add shipping

Untaxed Amount:
\$ 500.00

Tax 15%:
\$ 75.00

Total:
\$ 575.00

Figure 12: Sale Order

Send & Print
Preview
Credit Note
Reset to Draft

Draft
Posted

Customer Invoice
INV/2025/00007

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

Invoice Date
08/20/2025
Payment Reference ?
INV/2025/00007
Payment terms
30 Days
Payment Workflow
Invoice

Delivery Address ?
Deco Addict

Invoice Lines
Other Info

Product	Label	Quantity	Price	Taxes	Tax excl. ↕
[FURN_5555] Cable Management Box	[FURN_5555] Cable Management Box	5.00	100.00	15%	\$ 500.00

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

Untaxed Amount:
Tax 15%:
Total:

\$ 500.00
\$ 75.00
\$ 575.00

Paid on 08/20/2025 \$ 575.00

Figure 13: Invoice

Reset To Draft

Draft
Posted

PBNK1/2025/00003

Internal Transfer ? ☐

Payment Type ? ☐ Send ☒ Receive

Customer ?
Deco Addict

Amount ?
\$ 575.00

Date ?
08/20/2025

Memo ?
INV/2025/00007

Journal ?
Bank

Payment Method ?
Invoice

Saved Payment
Token ?

Payment Transaction ?

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.

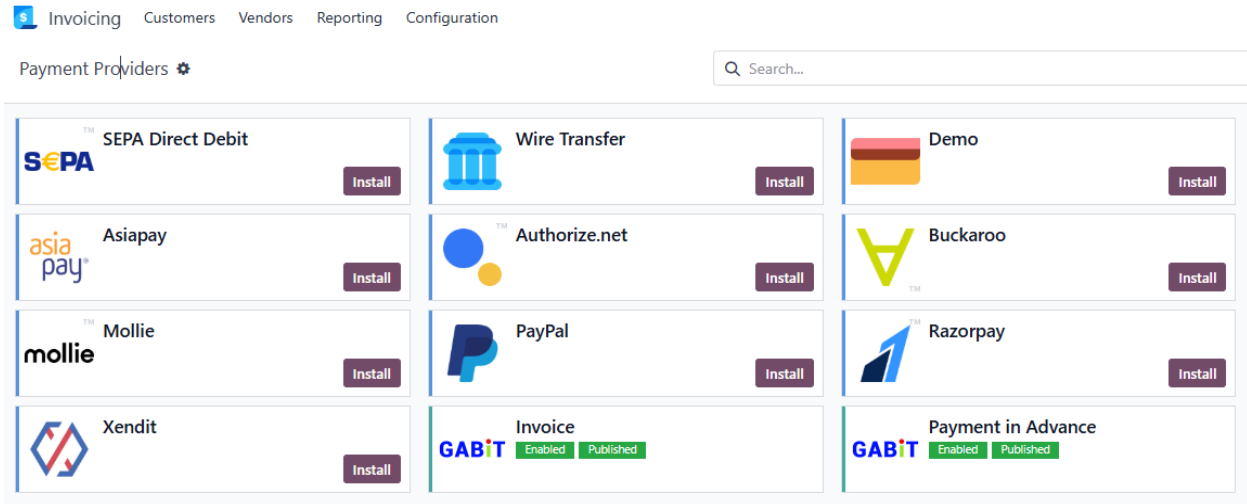


Figure 15: Payment Provider Configuration

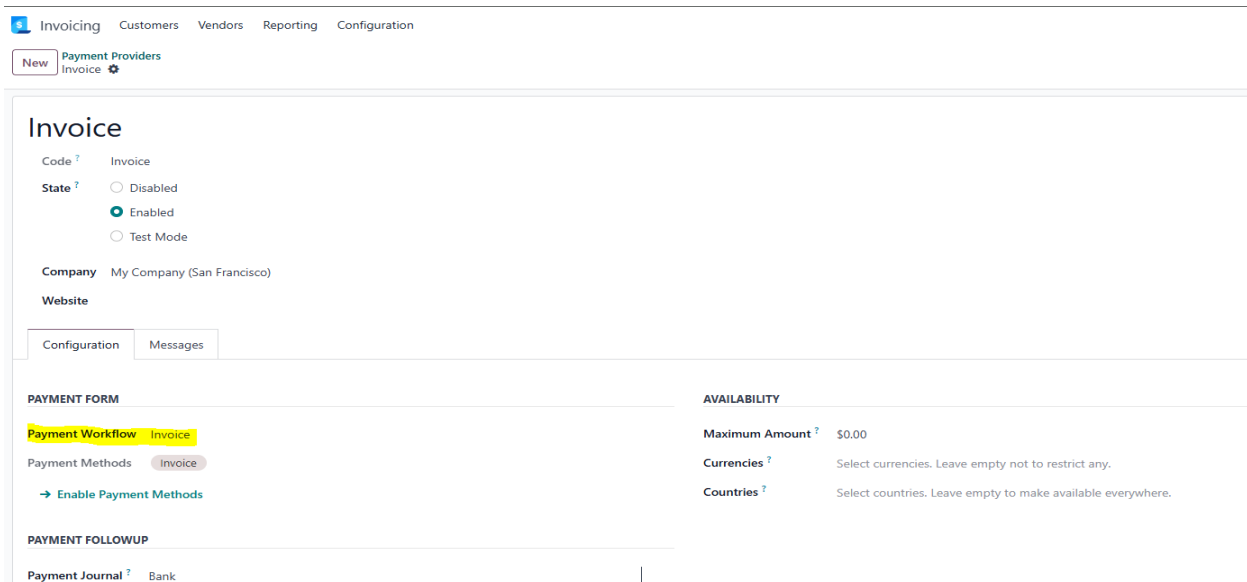


Figure 16: Payment Provider Configuration

4.4.2 Send Order Confirmation


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


AUTOMATION ECOMMERCE

Send Order Confirmation	<input checked="" type="checkbox"/>
Create Invoice	<input type="checkbox"/>
Create Payment	<input type="checkbox"/>

Figure 17: Order Confirmation Configuration

Thank you for your order.

Order S00052 

 Print

Payment Information

Invoice	Total:	\$ 345.00
---------	--------	-----------

Your order has been successfully processed. Thank you!

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

Figure 18: Sale Order Placed

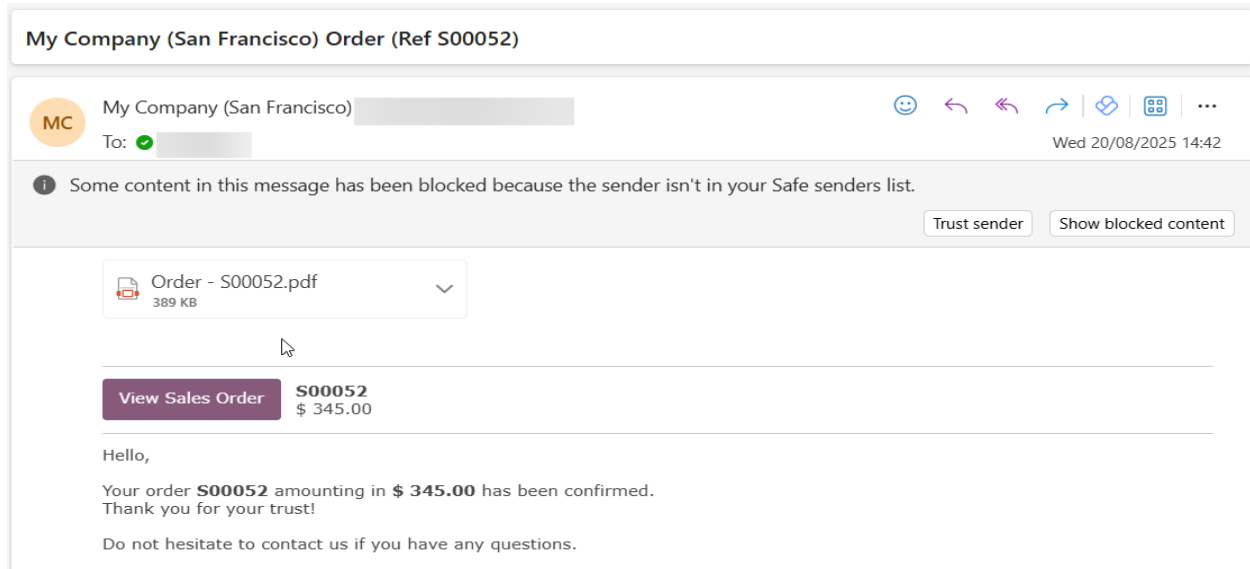


Figure 19: Example Email

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	<input type="checkbox"/>
Create Invoice	<input checked="" type="checkbox"/>
Send Invoice	<input checked="" type="checkbox"/>
Create Payment	<input type="checkbox"/>

Figure 20: Invoice Configuration



Thank you for your order.

Order S00053 ✓

[Print](#)

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

[Send & Print](#) [Register Payment](#) [Preview](#) [Credit Note](#) [Reset to Draft](#) [Draft](#) [Posted](#)

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

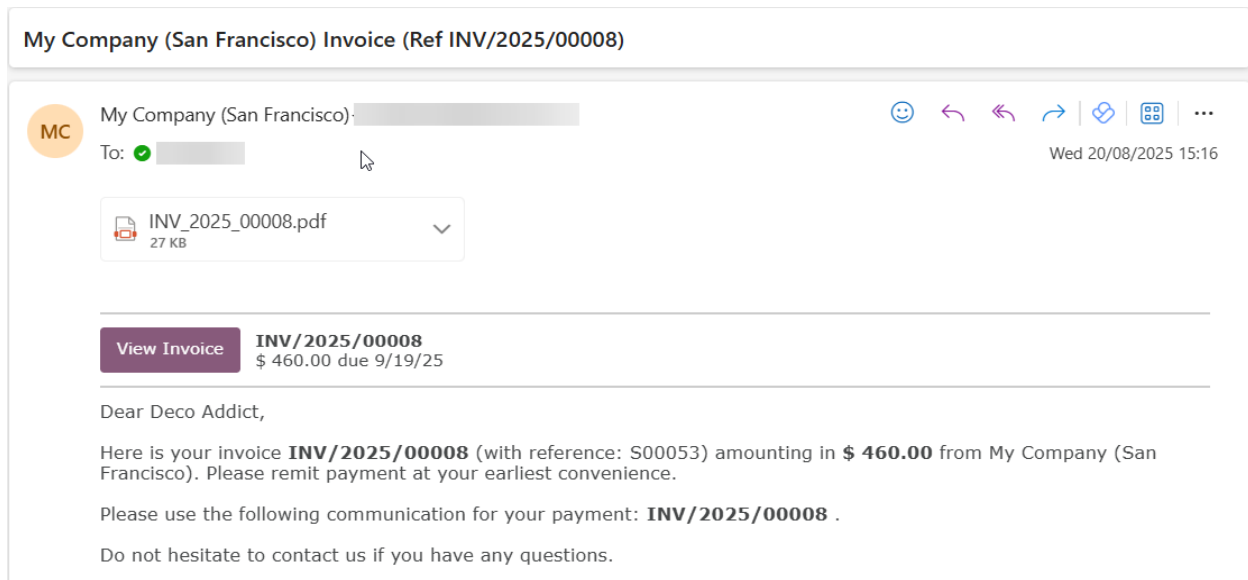


Figure 23: Example Invoice Mail

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.

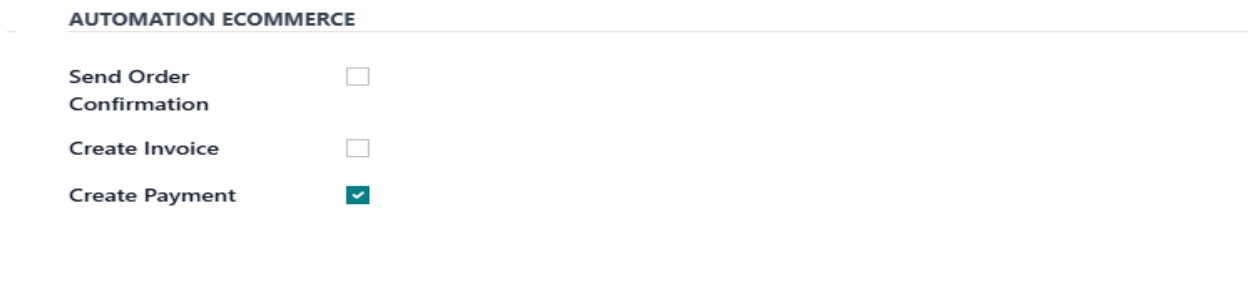



Figure 24: Ecom Payment configuration

Thank you for your order.

Order S00055 

 Print

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 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

Send & Print
Preview
Credit Note
Reset to Draft

Draft
Posted

Customer Invoice
INV/2025/00010

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

Invoice Date
08/20/2025

Payment Reference ?
INV/2025/00010

Payment terms
30 Days

Payment Workflow
Invoice

Delivery Address ?
Deco Addict

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

Paid on 08/20/2025 \$ 460.00

Amount Due: \$ 0.00

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 X

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.

Send by Email
Preview
Cancel
Release Pickings

Quotation
Quotation Sent
Sales Order

S00056

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

Order Date ?
08/20/2025 17:19:07

Invoice Address
Deco Addict

Pricelist ?
Benelux (USD)

Delivery Address
Deco Addict

Payment Workflow
Payment in Advance

Quotation Template

Payment Terms
30 Days

Order Lines
Other Info
Customer Signature

Product	Description	Quantity	Delivered	Invoiced	Unit Price	Taxes	Tax excl.
[FURN_5555] Cable Management Box	[FURN_5555] Cable Management Box	5.00	0.00	5.00	100.00	15%	\$ 500.00

Add a product
Add a section
Add a note
Catalog

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

Add shipping

Untaxed Amount: \$ 500.00
Tax 15%: \$ 75.00
Total: \$ 575.00

Figure 30: Sale Order

Sales Orders To Invoice Products Reporting Configuration

New Quotations / S00056 WH/OUT/00040

Detailed Operations

Print Labels Cancel Draft **Waiting Payment** Waiting Ready Done

☆ WH/OUT/00040

Delivery Address Deco Addict

Scheduled Date ? 10/01/2025 11:33:24

Deadline ? 10/01/2025 11:33:24

Source Document ? S00056

Operations Additional Info Note

Product	Demand	Quantity	
[FURN_5555] Cable Management Box	5.00	5.00	
Add a line			

Figure 31: Delivery for Payment Advance

5. Technical Requirements & Compatibility

- **Technical Requirements:**
 - Odoo module: *account_payment*, *website_sale_stock*, *sale_management* (must be installed).
- **Compatible With:**
 - Odoo Community & Enterprise Edition v19.0

6. Change Log / Release Notes

- **Version 1.0.0 – November 2025**
 - Initial release.

7. Support

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