Prerequisites

Before using Digiteal, you need to configure your Odoo installation.

1   Activate developer mode

To be able to install the Digiteal module, you should activate the developer mode.

Odoo 10

You can activate the developer mode in your user settings:

https://www.odoo.com/forum/help-1/question/how-to-see-the-and-activate-the-developer-mode-in-odoo-version-10-109530

Odoo 9

To be able to install the Digiteal module, you should activate the developer mode. Here is how: http://pulse7.net/openerp/odoo-9-how-to-activate-developer-mode/

Odoo 8

In Odoo 8, there is no developer mode but you should give the "technical" rights to your admin user:

1. After connecting to your Odoo installation, go to the "Settings" page. This page is available to the "admin" user.

2. Select the "User" options

3. Choose your user (yourself if you want to give the rights to yourself). Here, we will give the rights to the "Administrator" user.
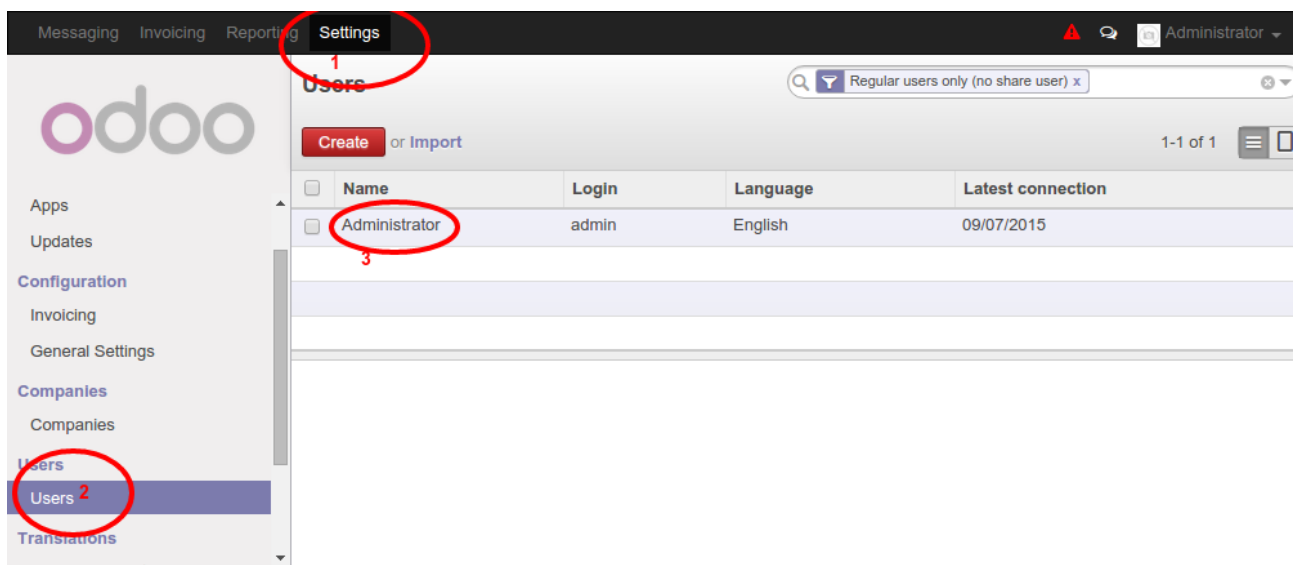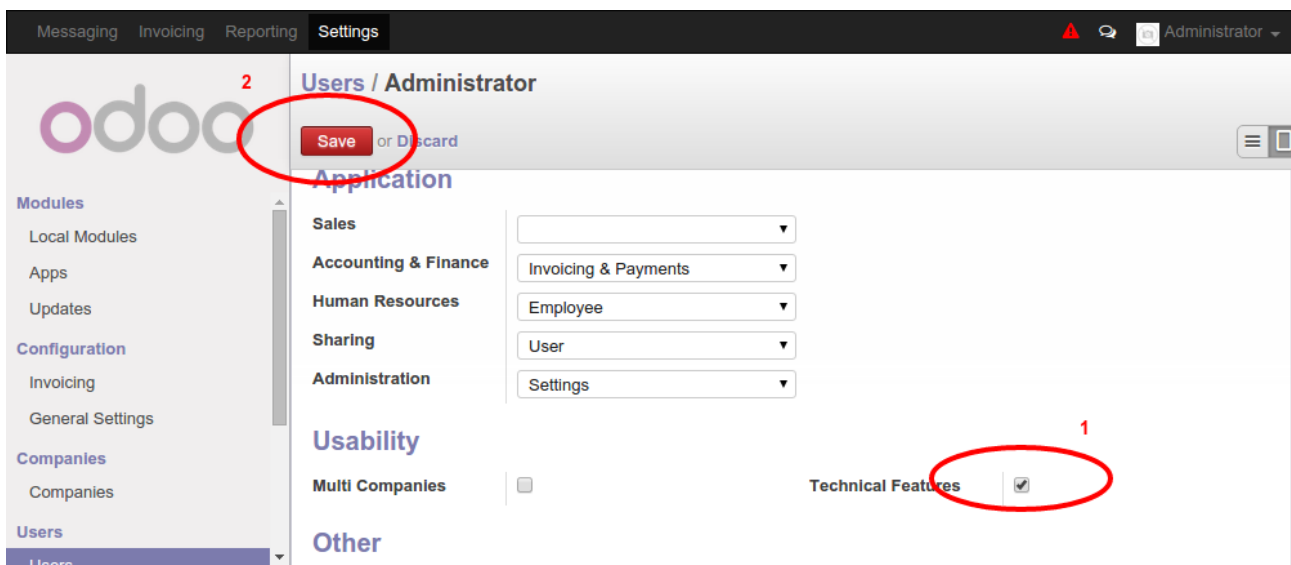

When you select your administrator user, a new screen opens, with all the configured settings. This screen is read-only. Please select the "Edit" button.
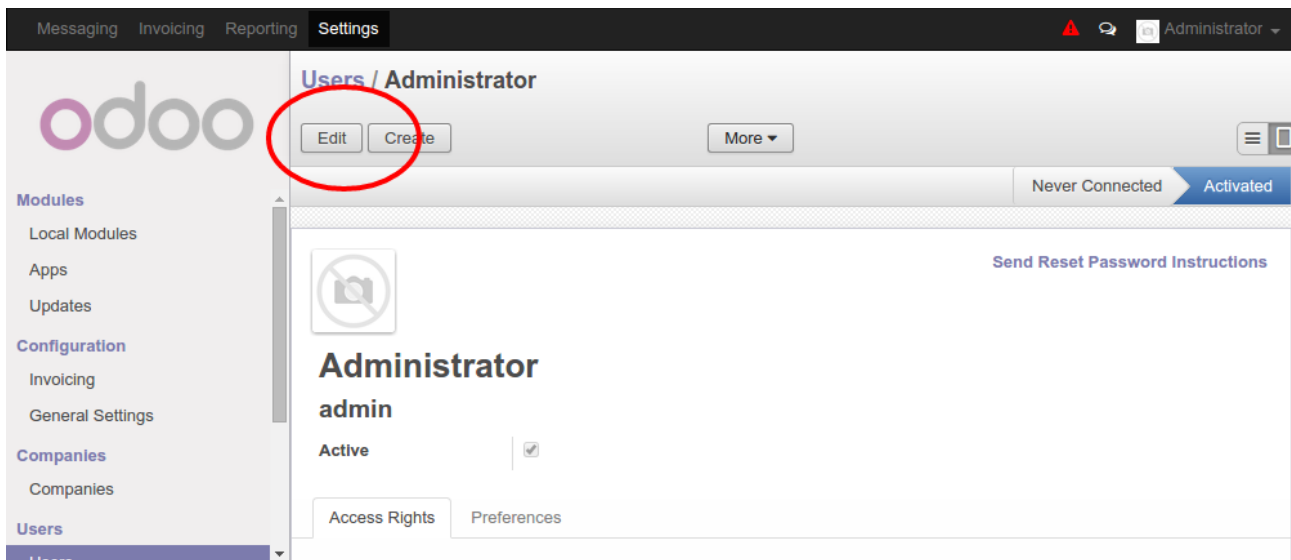
Now, you can change the options related to your user.

1. Select the "Technical features"

2. Save the changes

!! You must now log out and log in again, for the changes to take effect. !!

You user does now have the "technical" rights necessary to configure the Digiteal plugin.

2   Install the Digiteal plugin

Connect to your Odoo installation with a user with the correct rights.

1. Download the Digiteal module from Odoo:

Odoo 10: https://www.odoo.com/apps/modules/10.0/digiteal/

Odoo 9: https://www.odoo.com/apps/modules/9.0/digiteal/

Odoo 8: https://www.odoo.com/apps/modules/8.0/digiteal/

You will receive a ZIP file (ex: Digiteal-8.0.0.7.zip)

2. Extract the ZIP file in your Odoo addons/8.0 folder (ex: addons/8.0). Once that it done you should have for example an addons/8.0/digiteal folder.

3. You can then go to your Odoo settings and click on "Update the Modules List".

4. Then, you can find the Digiteal module in the "Local Modules" and click on "Install".

If you didn't install the "accounting" module before, you will need to configure your Accounting data's. Please follow the on screen informations. For example, you can receive a screen like this one:
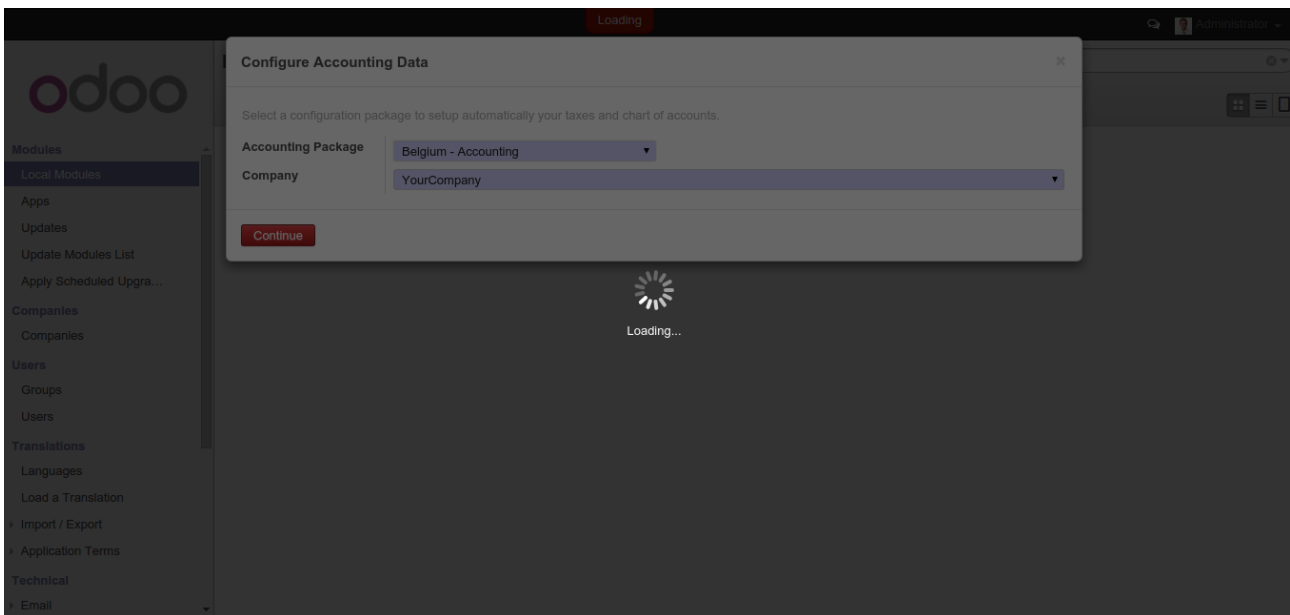
Your module is now configured. Let's configure the module.

3   Set the Digiteal parameters

It is now time to configure some parameters.

Again, connect to your Odoo installation, with the user configured above (a user with the "technical" rights). Select the "Settings pane.

1. In settings, choose "Parameters"

2. Choose "System parameters"

3. You will see a list of various parameters.

- If the parameter already exists, just clic on it. Note that some parameters are created during the installation of the Digiteal plugin. Other wise, clic on "Create and go skip the next step.

- If you choose to clic on a parameter, you need to edit it, by clicking the "Edit" button on top.

  - If you are adding a new parameter, the display open automatically in "Edit" mode: skip to next screen.

Now, edit the various informations on the screen:

1. Set the key and the value

2. Save the value

3. Go back to the list to modify other values
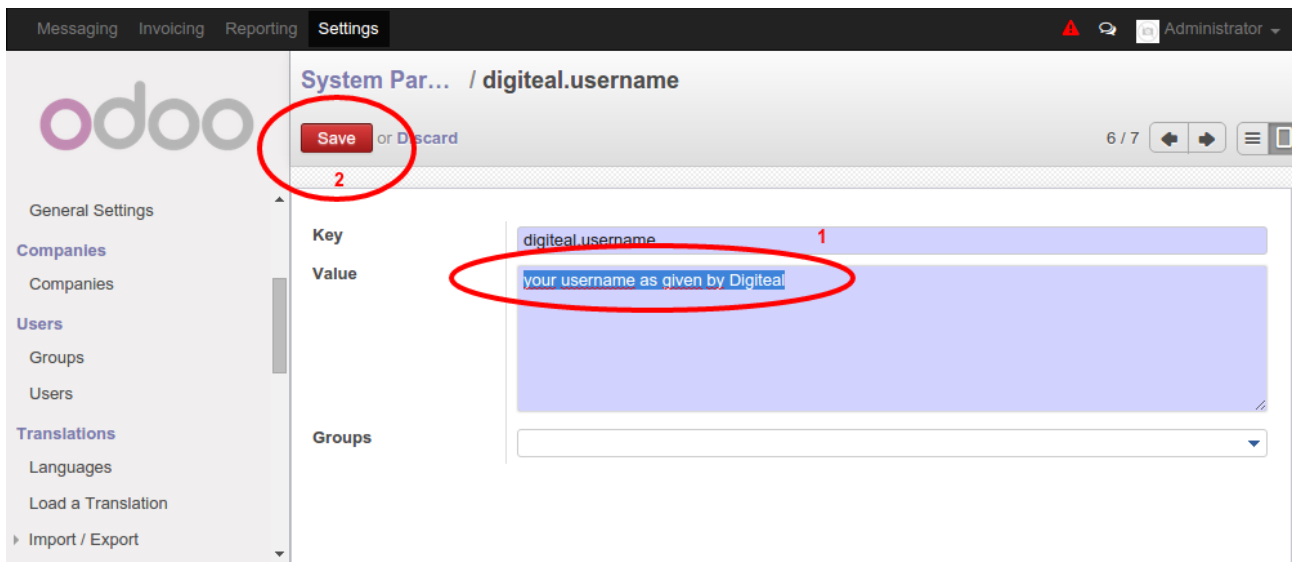
4 Values to be configured in Odoo

Key	Optional	Example	Explanation
digiteal.username	required	you@yourcompany.com	Your username as defined in Digiteal profile.
digiteal.password	required	yourpassword	Your Digiteal password.

If you wish to first start issuing invoices in the Digiteal TEST environment, you can override the URL of the Digiteal server to use with this one:

Key	Optional	Example	
digiteal.host_override	optional	https://test.digiteal.eu/api/v1/	TEST

The production environment is available at https://app.digiteal.eu/services/

If you have more than one bank account defined in Digiteal, you need to specify which one will be used here. If you forget to do so, a warning will be shown when generating your first invoice.

| Key	Optional	Example	Explanation
digiteal.iban	optional	BE010101010101010	Specify your IBAN (uppercase, no space, no dot, no dash).
digiteal.bic	optional	BICBICB	Specify your BIC (uppercase, no space, no dot, no dash).

You are now ready to make invoice with Digiteal.

Generate a Invoice and send it to Digiteal

Go to your "Invoice" screen, as usual. Create a new "Invoice".
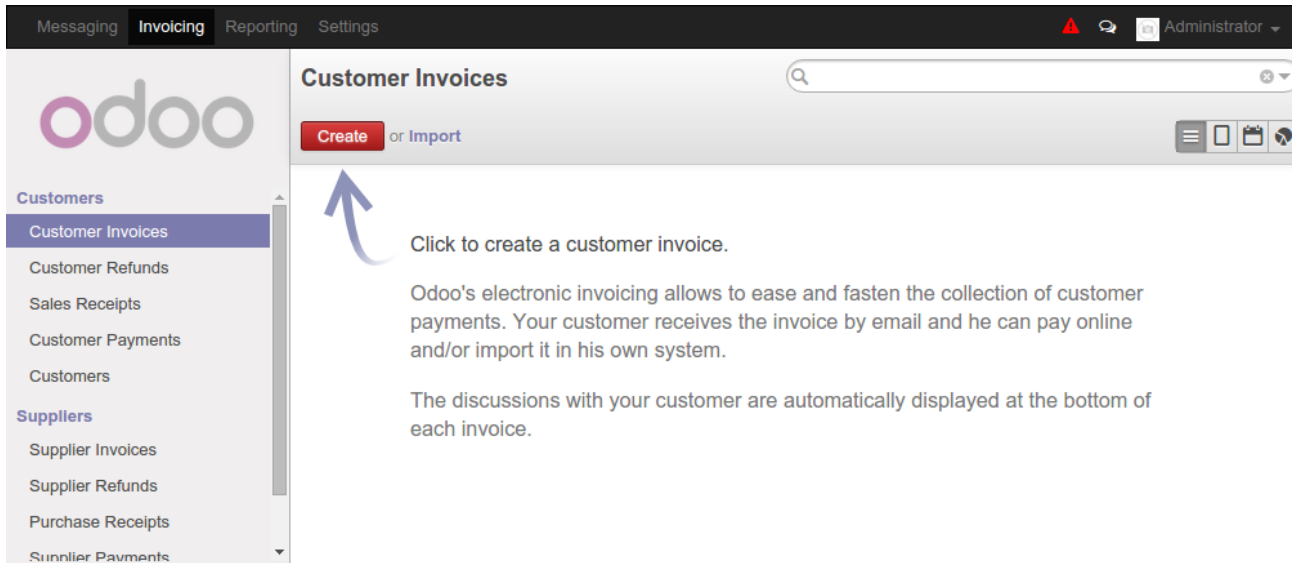
Select the various informations as usual. Save and validate your bill.
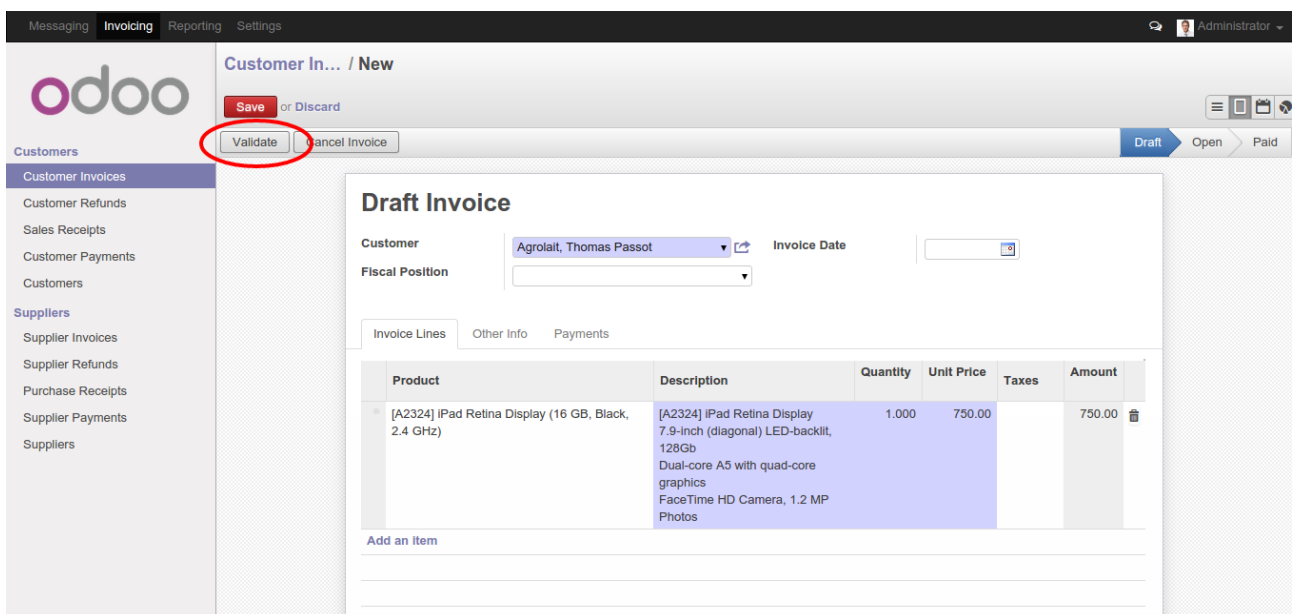
When validating the invoice, a call will be made to the Digiteal service. This call will add the Digiteal banner on your invoice, with various informations coded in it:

Invoice SAJ/2017/0029

Invoice Date:
03/23/2017

Description	Quantity	Unit Price	Taxes	Amount
Test	2.000	1.00	TVA 21% - Services	2.00 €

Total Without Taxes	2.00 €
Taxes	0.42 €
Total	2.42 €

| Tax	Base	Amount
TVA 21% - Services	2.00 €	0.42 €

Payment Term: 30 Net Days

During the validation of the invoice, this module will also check if the user wishes to receive his invoice in Digiteal or not. If he wishes to receive it in Digiteal, the button Send to Digiteal will be available. You should preferably send this invoice to your customer using Digiteal since if it is present it means that's what he prefers.
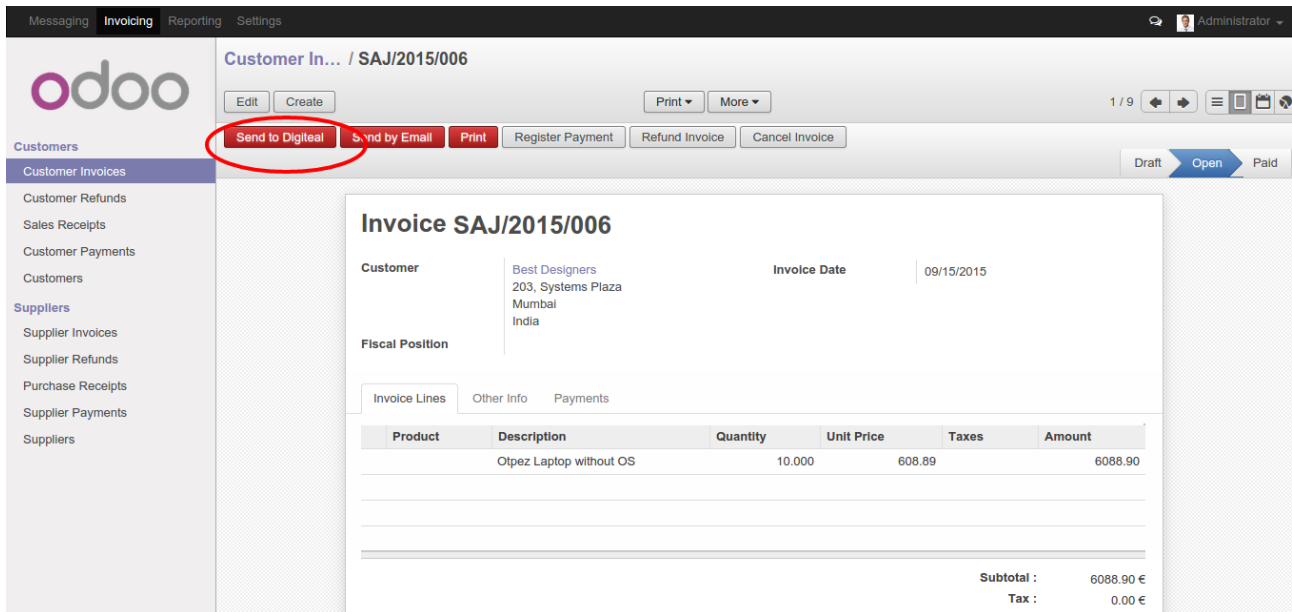
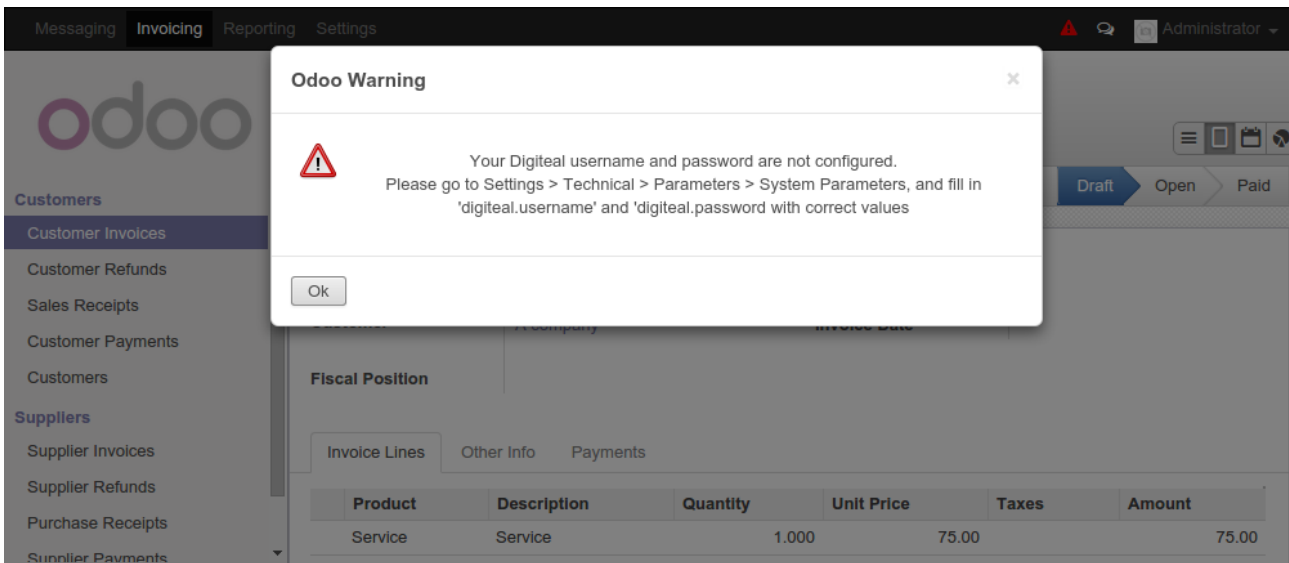You can also send it to your customer by email or print it, as before.

If you sent the invoice in Digiteal, the customer will be notified by email or through a push notification on his smartphone. Your invoice will look something like this in Digiteal:
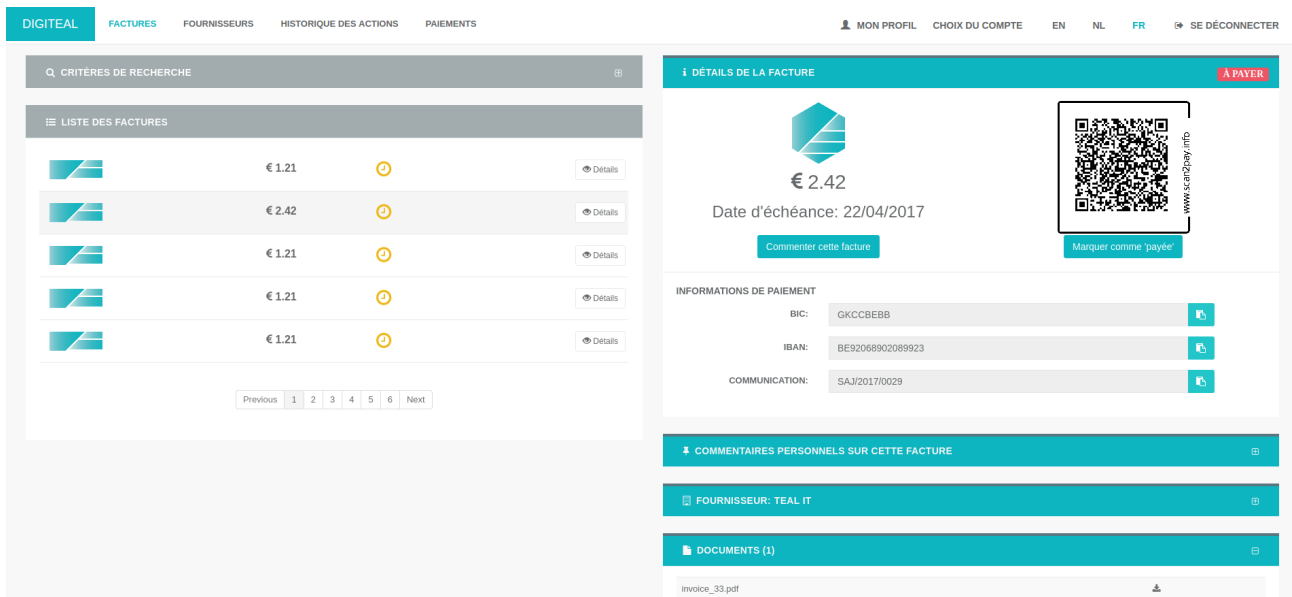
As you can see, the details for the payment are available and the PDF of the invoice is also available.

Troubleshooting

!! If you receive the screen above, it means you didn't configure the Digiteal service properly.

Please go back to the "Set the Digiteal parameters" section: