

Reports that answer back

One click, and the page follows

Slicers at the top, a detail page for each customer, changes explained: your measures read like Power BI, without leaving Odoo.

Odoo 18 module | BI Reports

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A dashboard shows, it doesn't dig

The number dropped. Finding which customer drove it means an export and a fresh pivot table.

Customer detail lives elsewhere

Going from the total to one customer means another screen, filters set again, and the meeting loses its thread.

A BI tool on the side skips the rights

It reads the database without Odoo's rules: rebuild them by hand, or show everyone everybody's numbers.

The solution

What the module brings



1

One click filters the page

A bar, a slice or a row: every visual follows that customer or month.

2

A customer's detail page

A right-click opens it, with a way back and a quick switch to another customer.

3

Changes explained

A waterfall shows, customer by customer, what moved a number.

4

Designed on screen

Drag a measure, move it, resize it. No code.

5

Five ready-made reports

Management, time and margin, customer experience, hosting, hour banks.

A management report

Slicers at the top, and every tile, chart and map following them.

Against the right period

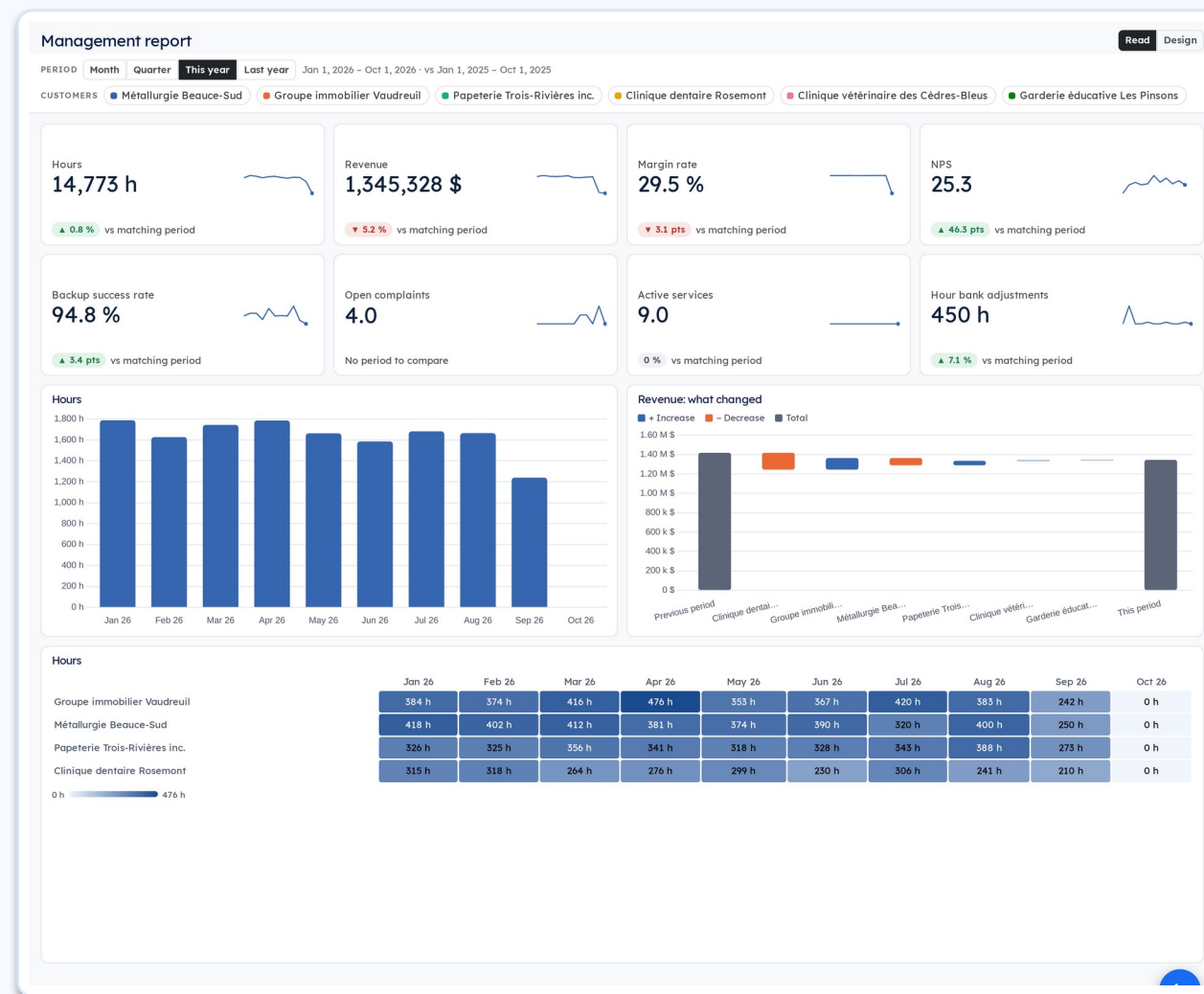
Year to date against the same dates last year;
a rate moves in points.

Tiles that tell the story

The value, the last twelve months and the
change, at a glance.

A map of your customers

Customers month by month, darker where the
hours pile up.



One click filters the whole page

Click a customer or a month: the rest of the report recalculates for it.

Context stays in view

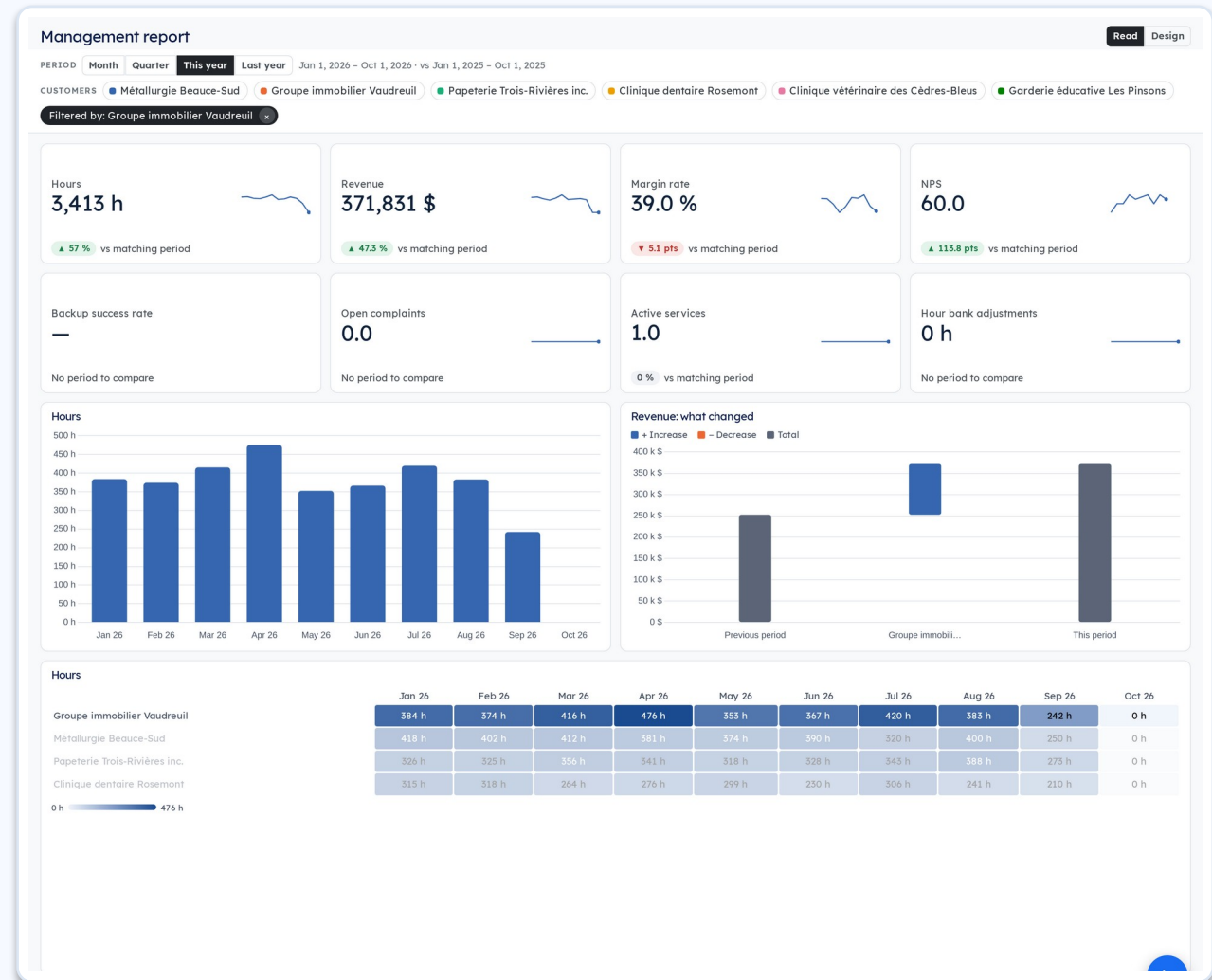
In the visual you clicked, the other customers fade back instead of vanishing.

A month replaces the period

Click April: tiles and comparisons switch to April, against last year's April.

Esc to go back

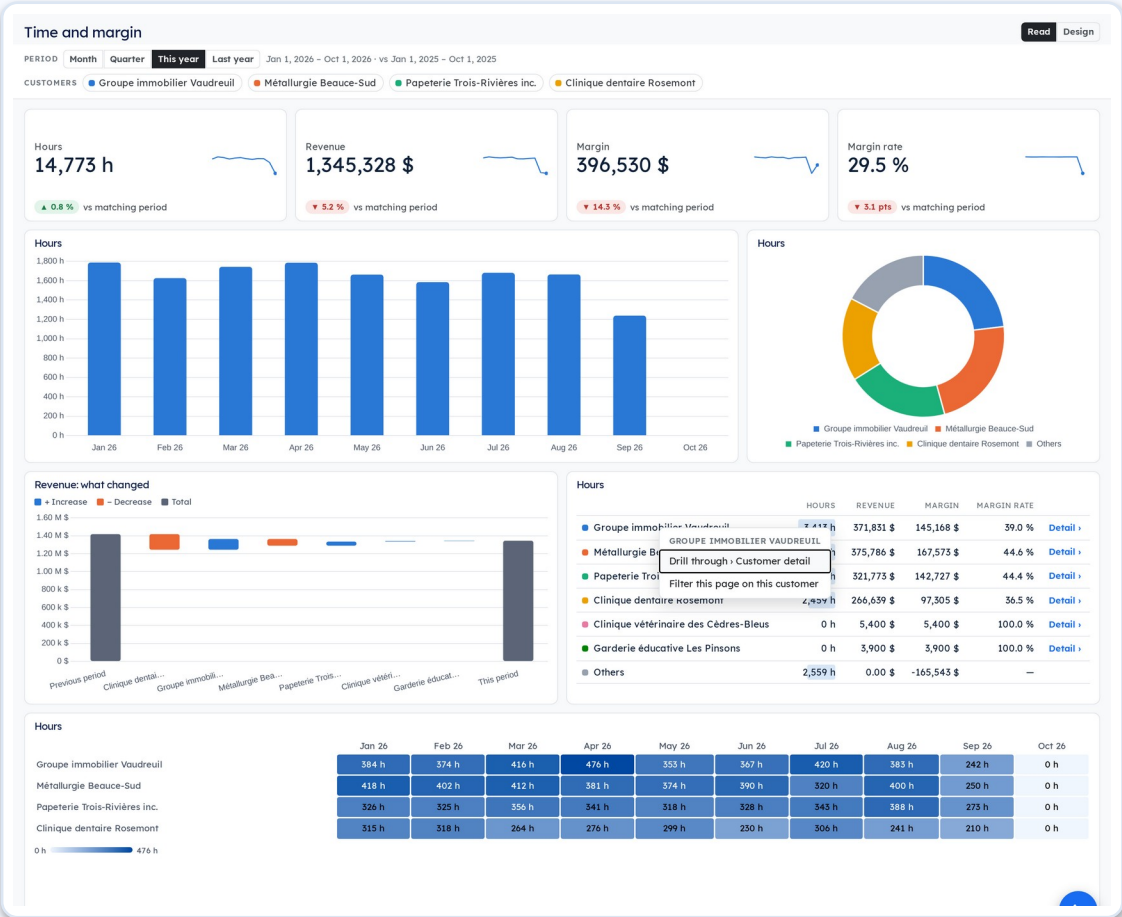
One key, or one click on its chip, and the filter is gone.



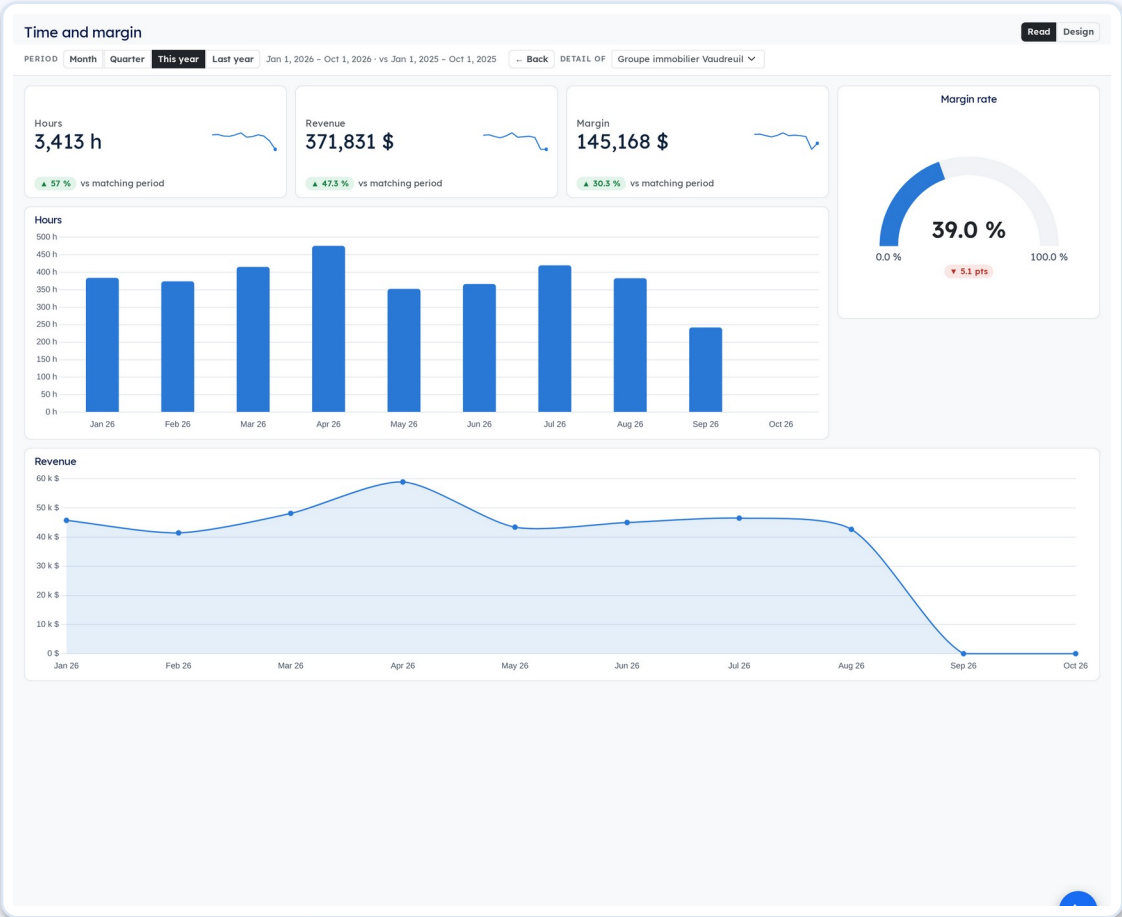
Customer detail, one right-click away



From the total to the customer's page, without another screen or filters set again.



Right-click a customer



Its detail page, with a margin gauge

What explains a change

The waterfall starts from the previous period and lands on today's number.

Customer by customer

Biggest change first, and a lost customer weighs as much as a new one.

The bars land on the total

The rest goes to "Others", lines without a customer included: nothing gets lost.

A rate does not add up

An average or a rate is refused in a waterfall, with the reason, rather than a wrong total.

Revenue: what changed

Revenue is down 5 % for the year. The waterfall shows which customers account for the drop, and which ones partly made up for it.

Designed on screen

Designers lay out a report the way you lay out a slide.

Drag, drop, resize

A measure drops into a visual, which moves and grows on a grid.

Nine visuals

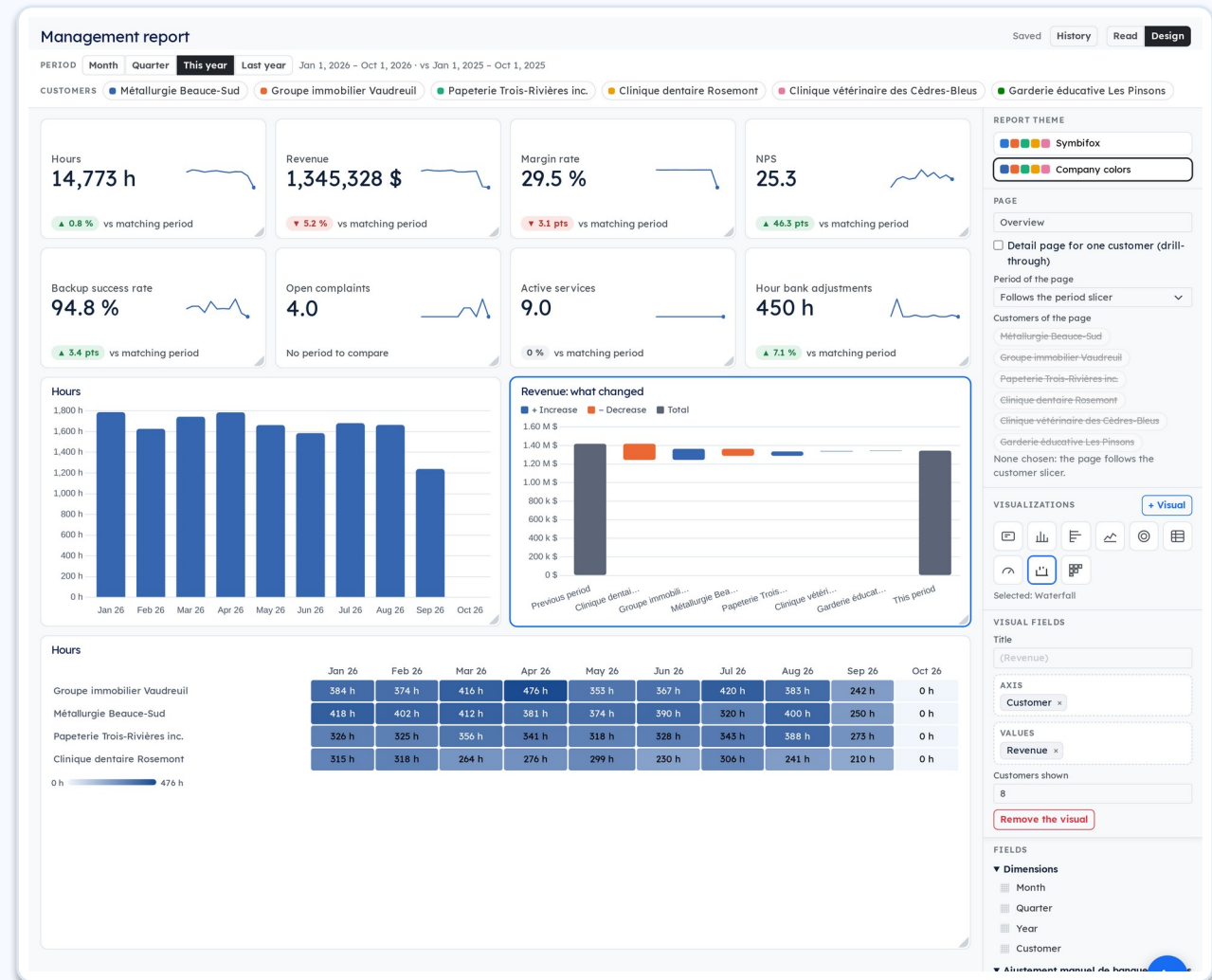
Tile, column, bar, line, donut, table, gauge, waterfall, heat map.

Nothing gets overwritten

It saves on its own; if a colleague saved in the meantime, you choose.

In your company's colors

The palette starts from your brand colors, adjusted to stay readable.



Five reports, ready to use

"From a template": the report opens, already named in your languages.

The management report

Time, customer experience, hosting and hour banks on one page.

Time and margin

Hours, revenue and margin by customer, with a margin gauge on the detail page.

Three more, ready too

Customer experience, hosting and hour banks, each with its own visuals.

A starting point

The report you create edits like any other: it's yours.

Create a report from a template

Template

☒ Time and margin

☐ Customer experience

☐ Hosting

☐ Hour banks

☒ Management report

Description

The figures of time, customer experience, hosting and hour banks on one page, what changed in revenue, hours by customer and by month, and a detail page for each customer.

Create the report

Cancel

Who sees what

Design is restricted; every number follows Odoo's access rights.

By role

Designer

Creates and edits reports, decides who can open them, and keeps their history.

Reader

Opens the reports of their groups; every number is computed under their rights.

Built-in protections

Computed for whoever looks

Nobody sees a number in a report that they could not read elsewhere in Odoo.

Restricted at first

A new report stays with designers until it is opened to other groups.

Thirty versions kept

An older version goes back into service as a new revision: nothing is lost.

One company, its reports

A report belongs to a company and follows the person's active companies.

A companion to your dashboards

Dashboards present; reports let you dig.



[See the catalogue](#)

BI Dashboards

- A free-form spreadsheet
- Tiles and pivot tables
- Period and Customer filters
- Add from any Odoo view

Interactive reports

- One click filters the page
- A detail page per customer
- Waterfalls, gauges, heat maps
- Laid out on a grid
- The same named measures

One definition of every number

Reports and dashboards read the same named measures: a report's margin is the dashboard's margin, computed under the same rights.

In short

1

One click filters the page

Every visual follows the customer or month you pick.

2

Detail without detours

A customer's page opens with a right-click.

3

Changes explained

The waterfall names the customers who moved the number.

4

Everyone sees their numbers

Computed under the rights of the person looking.

5

Ready on install

Five reports included, to adapt on screen.

See it on the demo, with data that has something to say.

Shall we talk?

Book a demonstration.



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