

PO2SO

Quick Start Guide

Get up and running in 5 minutes

Step 1: Connect Your Odoo

Link PO2SO to your Odoo instance to enable automatic sales order creation.

1. Log in to your PO2SO account at po2so.com
2. Go to Settings → Odoo Connection
3. Enter your Odoo URL (e.g., <https://yourcompany.odoo.com>)
4. Enter your database name
5. Enter your API user email and API key
6. Click "Test Connection" then "Save"

How to get your API key:

In Odoo: Settings → Users & Companies → Users → Select your user → API Keys tab → New API Key. Copy the key immediately (it won't be shown again).

Step 2: Submit Your First Purchase Order

Choose how you want to send POs to PO2SO:

Option A: Email Forwarding (Recommended)

Forward any email with a PO attachment to your unique PO2SO email address:

ai@po2so.com

Option B: Upload via Portal

- Go to Orders → Upload New PO
- Drag and drop your PDF file
- Click "Process Order"

Step 3: Watch the Magic

PO2SO automatically:

- ✓ Extracts customer, products, quantities, and prices using AI
- ✓ Matches data to your Odoo contacts and products
- ✓ Creates a sales order in Odoo (with original PO attached)
- ✓ Sends you an email confirmation

Confidence Scoring

Orders with high confidence (95%+) are processed automatically. Lower confidence orders go to your Review Queue for verification.

Tips for Best Results

- Use PDF files (recommended) – clearer than scanned images
- Include product codes/SKUs that match your Odoo products
- Ensure POs are legible and not handwritten
- Set up customer aliases for alternate company names

Need Help?

Documentation: po2so.com/faq
Email Support: support@po2so.com
Website: po2so.com