02

Accounting Dashboard

Odoo 19 Enterprise Â· Accounting

The Accounting Dashboard is your daily workspace. It provides quick access to all key accounting operations and shows real-time summaries of invoices, bills, and bank activity.

1 Access the dashboard

Accounting â–º **Dashboard**

The dashboard opens automatically when you enter the Accounting module. It displays widget cards for Customer Invoices, Vendor Bills, Bank, Cash, and Miscellaneous Operations. Each card shows a mini chart of recent activity and quick-action buttons.

2 Configure accounting periods

Accounting â–º **Dashboard** â–º **Configure**

Click Configure on the Accounting Periods card to set your fiscal year start/end and tax return periodicity (monthly, quarterly, or annually). This determines how Odoo organises your financial periods and when tax returns are due.

ACCOUNTING PERIODS FIELDS

Fiscal Year	Last day of the fiscal year. Default is 31 December.
Tax Return Periodicity	How often tax returns are filed: monthly, quarterly, or annually.
Reminder	Days before the tax return deadline to show a reminder on the dashboard.

3 Review the chart of accounts

Accounting â–º **Dashboard** â–º **Review**

Click Review on the Chart of Accounts card to open the full account list. Verify that the accounts match your company's requirements. Set opening balances here if migrating from another system.

4 Set default taxes

Accounting â–º **Dashboard** â–º **Review**

Click Review on the Taxes card to set the default tax rates applied to sales and purchase transactions. For Malaysian companies, configure SST (Sales and Service Tax) rates here.

5 Add a bank account

Accounting â–º **Dashboard** â–º **Add a bank account**

Click Add a bank account to connect your company bank. A list of supported Malaysian banks appears â€" select your bank and click Connect. If your bank is not listed, click Create it to enter the account details manually.

> **Online synchronisation â€"** Odoo Enterprise supports automatic bank statement import for supported banks. After connecting, use Online Synchronisation from the Bank widget to pull transactions directly.

6 Using the dashboard widgets

Each widget card has three dots (â‹®) in the top right corner. Click it to access additional options: view statements, create new entries, view reports, or access reconciliation. Use the Filter button at the top of the dashboard to show only Sales, Purchases, Liquidity, or Miscellaneous journals.