

02

Uploading and Organising

Odoo 19 Enterprise · Documents

Keep documents organised by workspace and tag for fast retrieval.

1 Upload a document

Documents → Upload

Click Upload in the top left to upload one or more files. Alternatively, drag and drop files directly onto the Documents view. After uploading, assign the document to a workspace, add tags, and link it to an Odoo record (customer, employee, project) if relevant.

2 Workspaces and permissions

Documents → Configuration → Workspaces

Create workspaces for each functional area: HR Documents, Finance, Sales Contracts, Quality Certificates, Legal. For each workspace, set read and write access by job position or individual user. Sensitive workspaces like HR or Finance should be restricted to relevant staff only.

Default workspace per module Configure default workspaces per Odoo module in Documents → Configuration → Settings. For example, all files attached to HR records automatically go to the HR workspace, and all invoice PDFs go to the Finance workspace. This keeps the document library organised without manual effort.

3 Share documents externally

Documents → (select document) → Share

Click Share on any document to generate a secure link. Configure: expiry date, download or upload permission, and email notification when accessed. Send the link to a customer, vendor, or auditor. They access the document directly – no Odoo account needed. The share activity log records every access.