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Documents Overview

Odoo 19 Enterprise · Documents

The Documents module is a document management system built into Odoo that lets you store, organise, share, and collaborate on files without leaving the platform.

1 What Documents does

Documents

Documents provides centralised file storage integrated with all Odoo records. Store contracts, proposals, HR documents, quality certificates, and any business files. Documents link to the relevant Odoo record – an NDA links to the customer, a payslip links to the employee. Permissions control who can view or edit each document. Workflows automate document review and approval processes.

2 Key concepts

Workspace: a folder with its own access permissions – e.g. HR, Finance, Sales. **Tag:** metadata label for quick filtering – e.g. Contract, Invoice, Certificate. **Activity:** a task associated with a document – e.g. "Review by Legal" or "Approve by CFO". **Share:** a secure link that lets external parties view or upload documents without an Odoo account.