Moving to OESync From Manual E-Invoicing: A Step-by-Step Plan

How Odoo users in the UAE can move from keying or uploading invoices by hand to an automated connection, with a 10-step plan, a testing checklist, a cut-over plan, and the questions to settle first

Many UAE businesses start e-invoicing by hand. Someone creates the invoice in Odoo, then re-enters or uploads its details to a provider's portal. That works for a few invoices a week, but it breaks down as volume grows, because every re-keyed field is a chance for a rejection. OESync is Perfonec's UAE e-invoicing connector for Odoo. This guide gives a practical plan for moving from the manual process to a connected one without losing control. Perfonec develops OESync, so we disclose that interest, and the plan applies to any connector you choose.

QUICK ANSWER: MOVING FROM MANUAL E-INVOICING TO OESYNC	
Why move	Manual re-keying costs time, causes typing errors, and makes rejections hard to trace
First check	Your Odoo hosting. Odoo Online does not accept non-standard apps, while Odoo.sh and on-premise do
Your data	A connector does not fix missing tax numbers, vague item names or wrong tax codes. Fix them first
Safest route	Test on a copy of Odoo, run the manual and connected methods side by side, then cut over with a fallback
Confirm with Perfonec	Your Odoo version and edition, the accredited provider, the invoice types supported, and the total cost
Dates	AED 50M or more: 1 Jan 2027. Below AED 50M: provider by 31 Mar 2027, live 1 Jul 2027. Pilot testing carries no fines

Manual and Connected E-Invoicing Compared

Area	Manual Process	Connected Process
Entry	Someone re-enters or uploads each invoice	Invoice data moves from Odoo to the provider through the connector
Errors	Typing mistakes and missed fields are common	The same data is used once, so fewer re-keying errors. Data quality still matters
Status	Checked by logging in to the provider portal	Status is meant to be visible in Odoo. Confirm exactly how for your version
Time	Grows with every invoice	Mostly fixed once set up, with time spent on exceptions
Audit trail	Spread across Odoo, files and the portal	Kept closer to the invoice. Confirm what is stored and for how long

Step 0: Check Your Odoo Hosting First

Hosting	Non-Standard Apps and Connectors	What It Means
Odoo Online	**Not compatible**	Odoo's documentation says Odoo Online is not compatible with non-standard apps, so a connector cannot be installed
Odoo.sh	**Supported**	Custom modules can be deployed, and staging copies are available for testing
On-premise	**Supported**	You or your partner control the server and modules

Hosting rules can change, so confirm the position with Odoo. Perfonec lists Odoo 16, 17, 18 and v20 for OESync, so confirm that your version and edition are covered.

The 10-Step Plan

Step	What to Do	Output
1. Measure the manual process	Count invoices per week, rejections per month, and hours spent on re-keying	A baseline you can compare later
2. Check hosting and version	Confirm Odoo Online, Odoo.sh or on-premise, and your Odoo version	A yes or no on installing a connector
3. Audit your data	Check tax numbers, item names, units, addresses and tax categories	A fix list, by owner
4. List your invoice types	Standard, credit note, advance, export, free zone and foreign currency	A test plan
5. Settle the provider and cost	Confirm the accredited provider, the fees, and the support terms in writing	A written scope and quote
6. Install on a copy	Set up the connector on a staging or test copy, never on live data first	A working test system
7. Test side by side	Run each invoice type through the manual and connected routes, and compare results	A list of differences
8. Train the team	Agree who sends, who monitors status, and who fixes rejections	Named owners
9. Cut over	Pick a date, back up Odoo, install on live, and keep the manual route as a fallback	Connected invoicing live
10. Review weekly	Check rejections, status and exceptions for the first weeks, then monthly	A stable process

Data Fixes Before You Connect

Data	Problem to Fix	Why It Matters
Customer tax numbers	Missing on business customers	A business invoice needs the buyer's number
Item names	Generic names such as Services or Goods	Invoice lines must say what was supplied
Units	Non-standard units such as Box or Lot	Units must map to recognised codes
Addresses	One text block instead of street, city and country	The invoice needs structured address fields
Tax categories	Zero-rated and exempt items set at the standard rate	Wrong categories cause rejections and wrong VAT
Free zone customers	Not marked as free zone buyers	Treatment can differ, so mark them clearly

Testing Checklist for the Pilot Phase

Pilot testing carries no fines, so make mistakes now. Test each invoice type you raise, using real examples with the data cleaned. Compare the connected result with your manual result, and keep a log of every difference. Please confirm with Perfonec which invoice types OESync supports for your Odoo version, and test only those you will actually use.

Test	What to Check
Standard invoice	All required fields appear and the provider accepts it
Credit note	It refers to the original invoice and reverses the right amounts
Export invoice	Zero-rated tax category and the correct buyer details

Test	What to Check
Free zone customer	The buyer is marked correctly and the tax treatment is right
Foreign currency	The AED equivalent and the exchange rate appear correctly
Rejection	You can read the reason, fix the data, and send again

A Safe Cut-Over Plan

Before Cut-Over	On Cut-Over Day	After Cut-Over
Back up Odoo and save the manual process steps	Install on live during a quiet period, and send one real invoice first	Keep the manual route as a fallback for a short, agreed period
Confirm every test passed, and every owner knows their job	Check the status in Odoo and at the provider	Review rejections and exceptions every week for the first month
Fix the open items on your data list	Tell your team and key customers the date	Compare time spent against your Step 1 baseline

Timeline for Each Phase

If Your Date Is	Suggested Order of Work
1 January 2027 (revenue AED 50M or more)	The provider date of 30 October 2026 has just passed, so settle the provider now. About 7 weeks remain, so run data fixes and test setup together, and test every invoice type in the pilot phase
1 July 2027 (revenue below AED 50M)	November to January: measure the manual process and audit the data. February to March: settle the provider by 31 March. April to May: install on a copy and test. June: train, then cut over

This timeline is my suggested order of work, not an official timetable. Please confirm which financial year counts for the AED 50 million test, and whether your business is in scope, with your tax adviser. Published fines after go-live are AED 5,000 per month for not implementing, with no upper cap, and AED 100 per non-compliant invoice, capped at AED 5,000 per month. Dates were checked on 2 November 2026.

Who Does What After the Move

Role	Task
Accounts clerk	Raises invoices in Odoo, and checks the status of each one
Senior accountant	Reviews rejections, fixes data, and approves exceptions
Sales or customer service	Collects tax numbers and addresses from new business customers
Odoo administrator or partner	Looks after updates, backups, and the connector settings
Finance manager	Reviews the weekly rejection log and the monthly time saved

What Can Go Wrong, and What to Do

Risk	What to Do
Invoices are rejected after cut-over	Read the reason, fix the data, send again, and add the cause to your data checklist
The connector stops after an Odoo update	Test every Odoo update on a copy first, and ask Perfonec how updates are handled
A key person is away	Name a second owner for sending, monitoring and fixing
The provider has an outage	Keep the manual route documented as a fallback, and agree the support contact in writing
Data slips back into old habits	Make tax number and address fields required for new business customers

Questions to Settle With Perfonec Before You Start

- Which Odoo versions and editions does OESync support, and is ours covered?
- Which accredited provider does it use, and what is its accreditation number?
- Which invoice types are supported, and which are not?
- How are delivery status and rejections shown in Odoo?
- What is the total cost over three years, including the provider's fee, setup and support?

About Perfonec Computers: Odoo Ready Partner and Developer of OESync

Perfonec is an Odoo Ready Partner with Odoo Middle East (Cert n°0000699697) and the developer of OESync, a UAE e-invoicing connector for Odoo. We help Odoo users with the readiness check, data audit, installation, pilot testing, training and cut-over. Perfonec is also the Authorised QuickBooks Dealer and Pro Advisor, an authorised Zoho Partner, Authorised Silver Partner for TallyPrime, and Authorised Sage Reseller UAE.

Free Odoo e-invoicing readiness check. No cost, no commitment.

sales@perfonec.com | +971 56 408 5594 | +971 4 386 6199

Manama Street, Dubai, UAE | www.perfonec.com

Based on published guidance on UAE Ministry of Finance e-invoicing rules and Odoo's documentation on hosting. Product details, supported versions and costs can change, so confirm them with Perfonec in writing. Odoo is a product of Odoo S.A. For general guidance only, not legal or tax advice.