USER GUIDE

BE Sociale Balans /

Belgian social balance (sociale balans / bilan social) in Odoo: employment, entries and departures, training and diversity, filled from your employees with a weighted FTE and checked before export.

English

Odoo 18 · 19 · 20 · **support@pokutsoft.com** · pokutsoft.com

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1. Overview

Prepare the social balance that comes with the annual accounts: the wizard reads your employees, weights each one by the days worked in the year and splits full-time and part-time staff, counts entries and departures and women and men; you complete what the HR data cannot know, check the consistency and export the annex.

2. Features

- **Filled from your employees.** Everybody who belonged to the company during the year, archived employees included, weighted by the days of the year they were there.
- **Full-time and part-time.** The working calendar of each employee decides the split against a 38-hour reference week; an employee without a calendar is reported as unmeasured, not assumed full time.
- **Hours actually worked.** Taken from the attendance history when there is one; otherwise left empty for the figure of your social secretariat.
- **Entries and departures.** People who joined or left inside the year, from the same dates as the averages, with the departure reasons you add.
- **Training.** Formal, informal and initial training with participants, hours, cost and subsidies, and the share of women; the training cost ratio is computed.
- **Diversity.** Women and men counted from the employee records; the permanent and temporary split is yours to enter.
- **Checks and comparison.** Consistency checks, annex codes and a comparison with the previous year.
- **Export.** The annex as a CSV file for the filing of the annual accounts; nothing is filed from Odoo.

3. Installation

Open Apps, search for “BE Sociale Balans /” (technical name be_sociabalans_bilan_social_annex) and install it. Required modules: hr, mail. Available for Odoo 18.0, 19.0 and 20.0, Community and Enterprise. Interface languages: English, French.

4. Workflow

1. Open BE Social Balance > Social Balance and create the report of the financial year: period and scheme (full or abbreviated).

2. Make sure every employee has a working calendar, a contract start date and, for leavers, a departure date.

3. Click Populate and choose the sections. Employment lines are weighted by the days each person belonged to the company; women and men are counted from the employee records.

4. Complete what the HR data cannot know: hours actually worked (when there is no attendance history), personnel cost, training figures, the permanent and temporary split and the departure reasons.

5. Click Compute, then Check Consistency, Annex Codes and Compare with the previous year.

6. Confirm, Export the annex CSV and mark the report as filed with your annual accounts.

5. Roles and rights

HR officers (Employees: Officer) are users of the app; HR administrators are managers.

6. Questions

Why are the hours worked empty?

Without an attendance history the app does not invent them; enter the figure of your social secretariat.

Is a person who left in the year counted?

Yes, weighted by the days of the year they were employed.

7. Support

Questions are answered at support@pokutsoft.com.