Chapters, Sections & Delegated Governance

User Guide · Odoo 18.0 & 19.0

Federated chapter/section hierarchy with delegated admin, dues split/rebate engine and member transfers

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1. Overview

Chapters, Sections & Delegated Governance is an Odoo module (18.0 / 19.0) for the Iberian (Spain/Portugal) market.

Chapters, Sections & Delegated Governance Built for federated national associations that run local chapters and sections and need delegated administration, per-chapter dues splitting and roll-up reporting.

2. Key Features

• Delegated Chapter Administrator

Delegated Chapter Administrator. Tracks Administrator, Administers.

• Chapter Communication

Chapter Communication. Tracks Message, Chapter / Section, Include Sub-Units, Sender, Sent On. One-click send.

• Chapter Event

Chapter Event. Tracks Chapter / Section, Start, End, Registrations. One-click confirm, close, cancel.

• Event Registration

Event Registration. Tracks Event, Member. One-click cancel.

• Dues Plan

Dues Plan. Tracks Amount, Applies To.

• Dues Transaction

Dues Transaction. Tracks Member, Chapter at Time of Payment, Dues Plan, Amount, Revenue Split. One-click post, cancel.

• Association Member

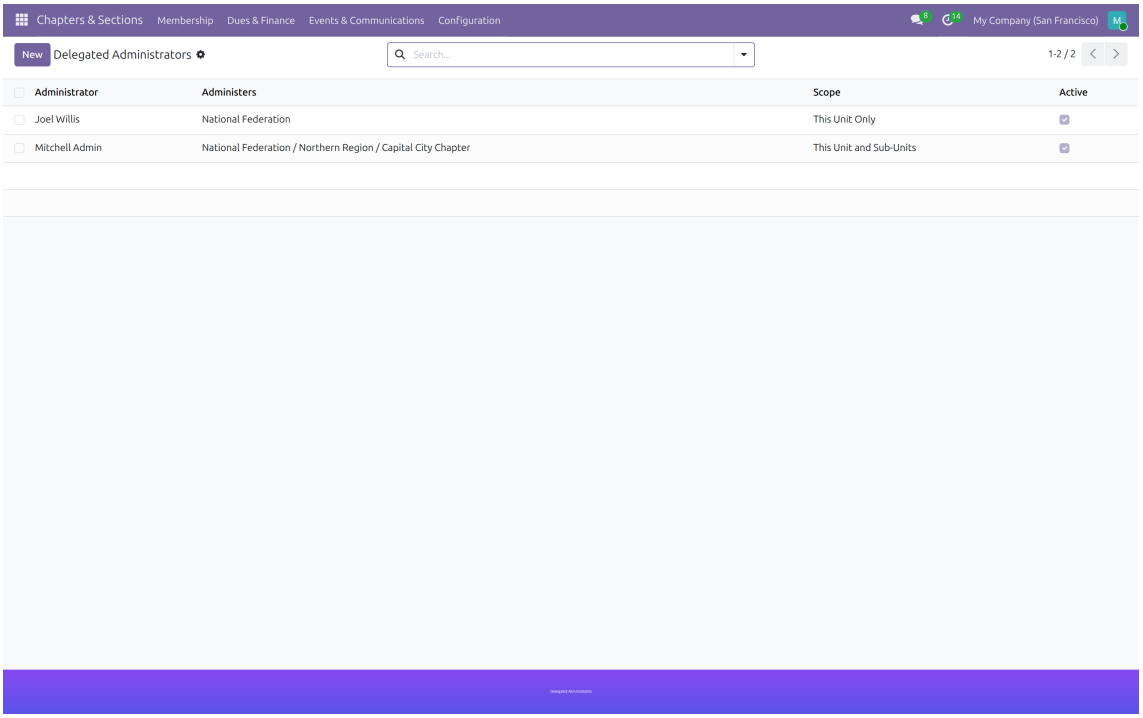
Association Member. Tracks Contact, Member Number, Chapter / Section, Join Date, Transfer History. One-click request transfer, view transfers, view dues.

• Member Chapter Transfer

Member Chapter Transfer. Tracks Member, From Chapter, To Chapter, Reason, Requested By. One-click approve, reject, close.

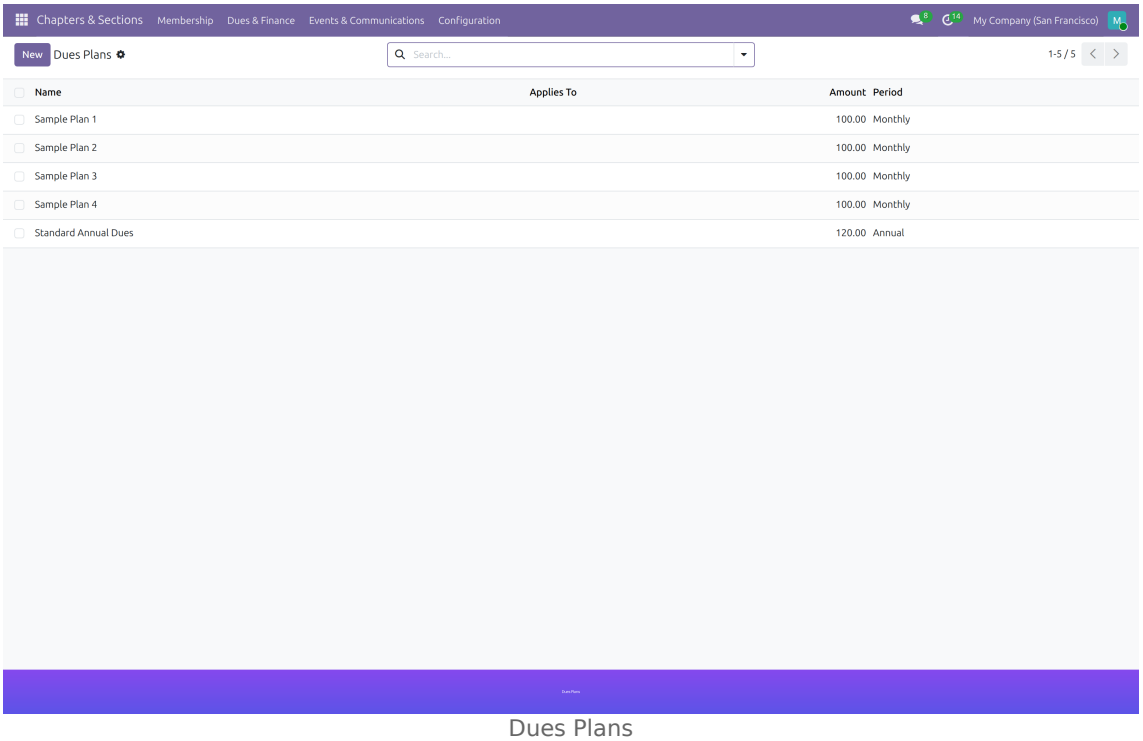
3. Screenshots

Live views from the running module (with sample data):



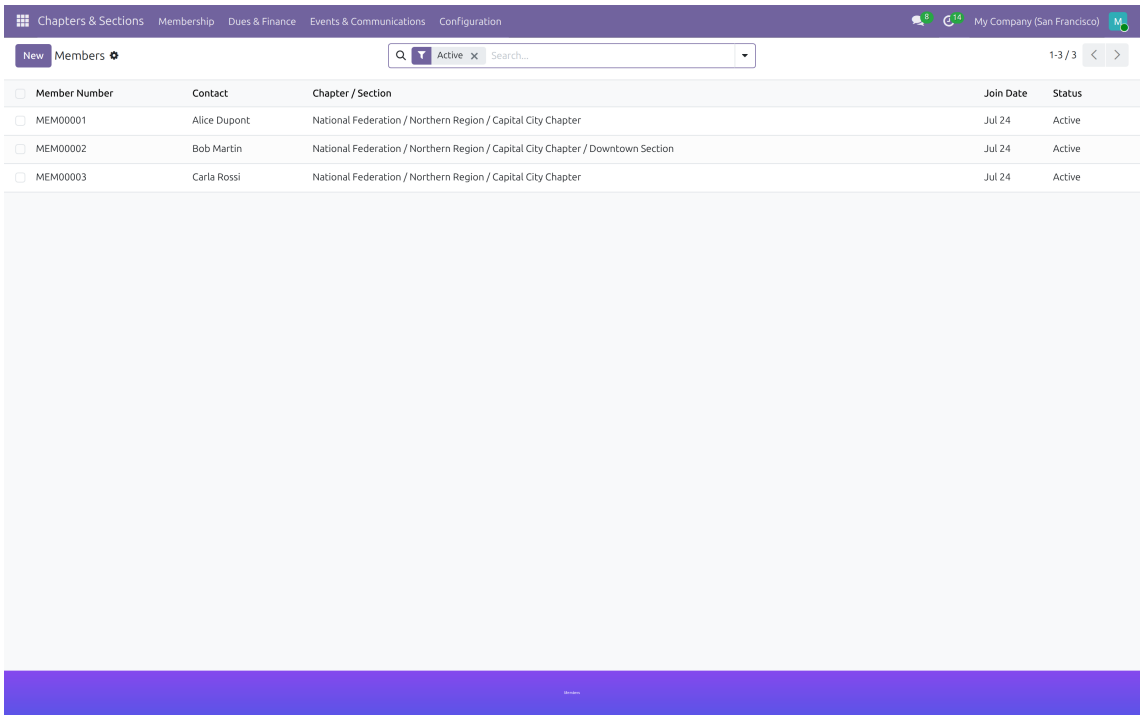
Delegated Administrators

Delegated Administrators



Dues Plans

Dues Plans



Members

4. Installation

Open Apps, click Update Apps List, search for “Chapters, Sections & Delegated Governance” (technical name **chapter_section_management**) and click Install. Supports Odoo 18.0 and 19.0, Community and Enterprise.

5. Menus & Navigation

After installation the following menus are available:

- Chapters & Sections
- Membership
- Members
- Transfers
- Dues & Finance
- Dues Plans
- Dues Transactions
- Events & Communications
- Events
- Communications
- Configuration
- Organization Units
- Delegated Administrators

6. Data Model

The module implements the following records and engines:

Model	Purpose
csm.chapter.communication	Chapter Communication
csm.chapter.admin	Delegated Chapter Administrator
csm.dues.plan	Dues Plan
csm.dues.transaction	Dues Transaction
csm.org.unit	Chapter / Section Organization Unit
csm.member	Association Member
csm.chapter.event	Chapter Event
csm.member.transfer	Member Chapter Transfer

7. Typical Workflow

1. Open the Configuration menu and set up master data / rules.
2. Create the main record via the primary menu.
3. Use the action buttons (Confirm / Compute / Generate / Export).
4. Review results in list, pivot and report views; export as needed.

8. Cert-clean & Privacy

This module generates worksheets / files / drafts. Submission to authorities is done by you with your own credentials (BYOK) — we are never the certified/registered party.

9. Support

Email **support@pokutsoft.com** or **https://pokutsoft.com**. Please state the Odoo version (18.0 / 19.0) and the technical module name.