Multi-Company Quick-Switch & Setup Clone

Clone configuration, products and templates across companies and switch context fast

User Guide · Odoo 18 / 19 Community
Category: Misc horizontal painkillers
Technical name: gb_multi_company_quick_switch_setup_clone
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This guide documents only features implemented in the module. Menu paths, field names and button labels match the application exactly.

1. Overview

Multi-Company Quick-Switch & Setup Clone removes the repetition of multi-company setup. A clone profile describes which records to copy (any model with a company field), and a clone batch copies them from a source company to one or more targets, with field overrides, de-duplication and a revert option.

There is nothing native for replicating setup across group companies. This module clones products, templates and configuration in bulk and lets users switch their active company quickly from a wizard.

Who it is for

- Administrators of multi-company / group databases.
- Consultants standing up new company branches.
- Anyone copying products or configuration between companies.

UK note

Useful for UK group structures sharing a common product or configuration baseline.

Key capabilities at a glance

- Clone profiles — Per-model copy spec with domain, de-dup field, options and field overrides.
- Clone batches — Source→targets copy with created/skipped/error counts, preview and revert.
- Result lines — Per-record outcome with message and open-record button.
- Field overrides — Change field values during cloning (text/int/float/bool/record).
- Auto-clone — Optional scheduled clone between a fixed source and target company.
- Quick switch — Wizard to set allowed and active companies, with add-all.

2. Installation

Install from the Odoo Apps menu with Administrator access; dependencies are pulled in automatically.

1. Open Apps from the main Odoo menu.
2. Click Update Apps List to refresh the catalogue.
3. Search for “Multi-Company Quick-Switch”.
4. Click Install on the matching card.
5. The Setup Cloner menu appears once installation finishes.

Technical name	gb_multi_company_quick_switch_setup_clone
Depends on	base, product, mail
Odoo versions	18.0 and 19.0
Licence	LGPL-3

3. Configuration

Define Clone Profiles under Setup Cloner ▸ Configuration.

Clone profiles

- Create a profile for a model (it detects whether the model has a company field).
- Set a domain to filter records, a de-dup field to skip existing targets, and options copy-active-only and skip-existing.
- Add field overrides (text/integer/decimal/boolean/record) to change values during the clone.
- Optionally enable auto-clone with a source and target company for scheduled copying.

4. Step-by-Step Usage

Run a profile into a batch, preview, then revert if needed.

Clone setup to companies

1. From a profile, Run to create a clone batch; pick the source company and target companies.
2. Use Preview to see what would be created before committing.
3. Run Clone to copy records; created/skipped/error counts are recorded.

Review and revert

1. Open the batch's lines to see each record's result (Created/Skipped/Error/Reverted) and message.
2. Open a created record directly from its line.
3. If the copy was wrong, Revert the batch to remove the cloned records.

Switch company fast

1. Open Quick Company Switch to set your allowed companies and active company in one step.
2. Tick add all to enable every company you may access.

5. Feature Reference

Each row corresponds to a real menu, model or wizard in the module.

Clone profiles	Per-model copy spec with domain, de-dup field, options and field overrides.
Clone batches	Source→targets copy with created/skipped/error counts, preview and revert.
Result lines	Per-record outcome with message and open-record button.
Field overrides	Change field values during cloning (text/int/float/bool/record).
Auto-clone	Optional scheduled clone between a fixed source and target company.
Quick switch	Wizard to set allowed and active companies, with add-all.

6. Tips, Troubleshooting & FAQ

Q. Which records can I clone?
A. Any model that has a company field. The profile detects this and copies the records matching its domain.

Q. Will it create duplicates?
A. Set a de-dup field and skip-existing so records already present in the target company are skipped.

Q. Can I change values during the copy?

A. Yes. Add field overrides to the profile to set new values on the cloned records.

Q. What if I clone the wrong thing?
A. Revert the batch; it removes the records it created and marks the lines Reverted.

Q. Can cloning run automatically?
A. Yes, enable auto-clone on the profile with a fixed source and target company for scheduled copying.

Q. How do I switch my active company?
A. Use the Quick Company Switch wizard to set your allowed companies and the active one in one action.

7. Support

We are happy to help with installation, configuration and usage questions.

Email	support@pokutsoft.com
Apps & catalogue	https://pokutsoft.com
Module	Multi-Company Quick-Switch & Setup Clone (v18.0 / v19.0)

When contacting support, please include your Odoo version, the module version and a short description of the steps that led to the issue.