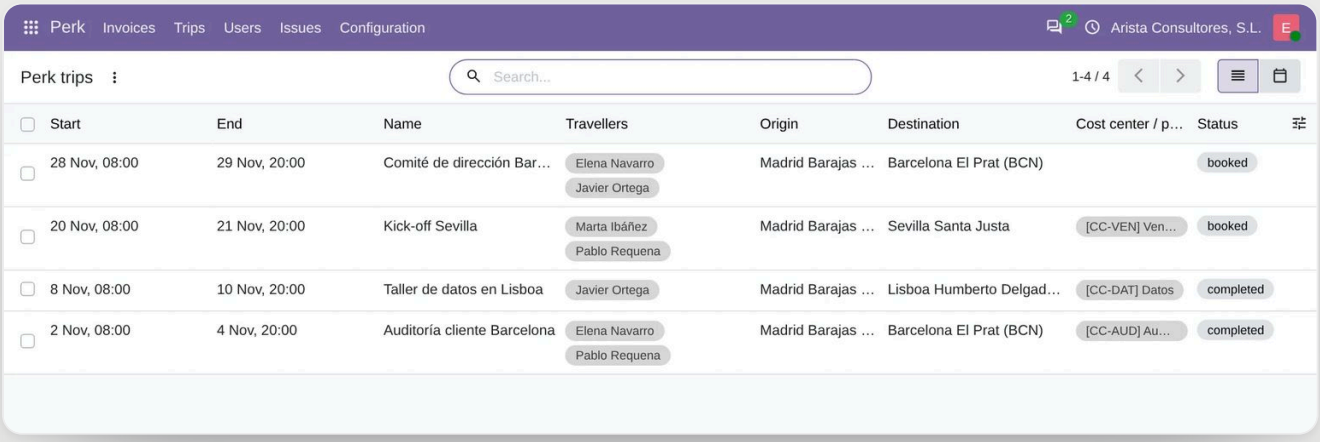
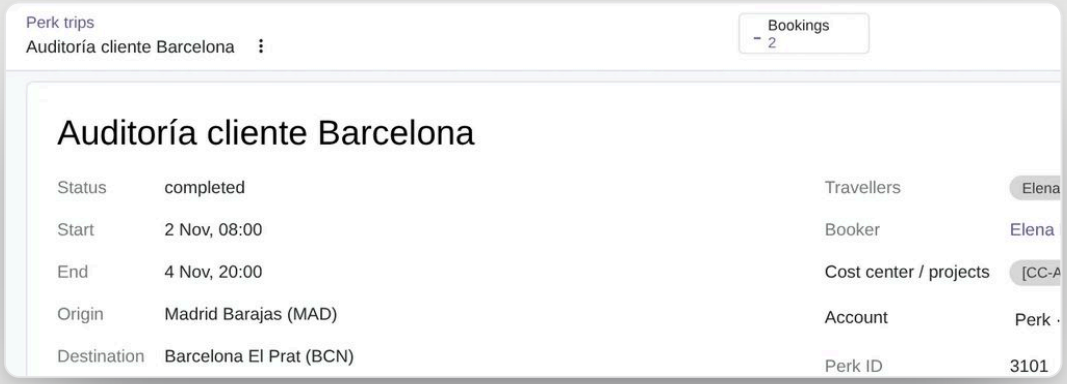
USER MANUAL · EXPENSES AND TRAVEL

Perk connector for Odoo

For those who already have the connector: install it, activate it, connect it, set it up and use it, step by step.

Module version 20.0.1.0.1 | Odoo 20 screenshots | Edition of 14-11-2026





Real Odoo 20 screenshot. The list of Perk trips and the detail of a trip with its bookings.

Contents

On the right, the page where each section starts. Menu and button names are those of Odoo in English.

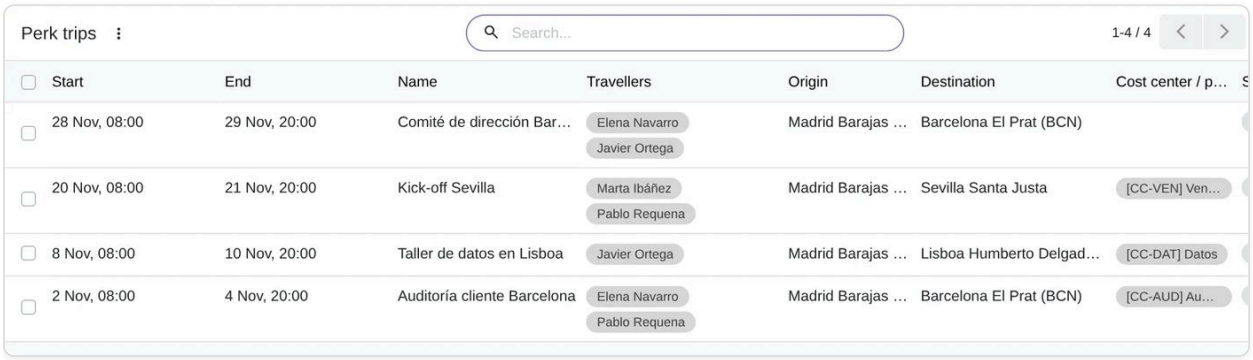
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This manual describes version 20.0.1.0.1 of the module (Odoo branch 20.0, commit bcc5d2cbc). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to Perk. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where it is

The connector adds the **Perk** app to Odoo, where you see the invoices, trips, users and cost centers that come from Perk. Perk invoices become vendor bills.



- **Real Odoo 20 screenshot.** The **Perk trips** list, with the traveller, origin, destination and cost centre of each trip.

Perk › Invoices	The **Perk invoices** list, with the invoices that come from Perk.
Perk › Trips	The **Perk trips** list. Each trip has its bookings.
Perk › Users	The **Perk users** list.
Perk › Issues	The **Perk sync issues** list.
Perk › Configuration	**Connections**, **Cost centers and projects**, **Taxes**, **Products**, **Sync log** and **Webhooks received**.

Outside its own app, the connector adds the **Perk trips** button and the **Perk** group, with the **Send to Perk** button, to the employee record. The analytic account also gains the **Perk trips** button, and the vendor bill gains the **Perk** tab with its Perk invoice and the traveller and trip on each line.

2 Before you start

Gather this before you install the connector and create your first connection with Perk.

- A Perk account on the Pro plan and an API key, which a Perk administrator creates under Settings › Developer › API Tools.
- The **Authorize with Perk** method you see in the connection waits for Perk to activate the FlexigoTech application in production. Until then, connect with the API key.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server. Odoo Online will not work, because it does not let you install third-party modules.
- An Odoo administrator. Only an administrator can enter the key and accept that FlexigoTech Cloud stores it. The connection options can also be changed by an accounting manager.
- The FlexigoTech Cloud subscription or trial. Without it, the connector does not talk to Perk.

> What the connector does not set up for you in Perk: the account, the Pro plan, the API key and the custom projects field, if you use it. All of that is prepared in Perk beforehand. The credentials are not stored in your Odoo: they are stored encrypted in FlexigoTech Cloud.

3 Installation

The module is installed like any third-party Odoo module. An administrator is required.

How to get it

From its page on Odoo Apps (**https://apps.odoo.com/apps/modules/20.0/flexigo_perk_connector**) or from the connector's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module's page lists it under "Community Apps Dependencies" and its price already includes it; it is free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigo_perk_connector` and `flexigotech_cloud` into your project branch, in your modules folder, and push.
2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.
3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode), search for "Perk" and click **Activate**.

On your server

1. **Copy the folders**
   Leave `flexigo_perk_connector` and `flexigotech_cloud` in a folder that is in the `addons_path` of your Odoo.

2. **Restart Odoo**
   So it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "Perk" and click **Activate**.

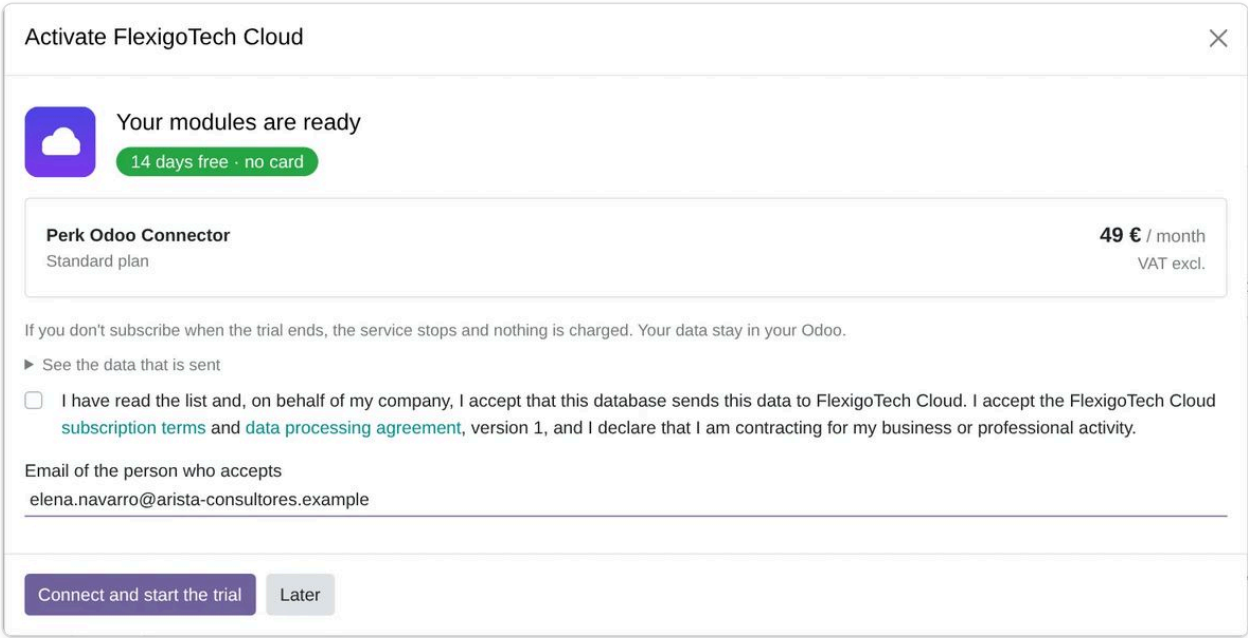
> When installing it, Odoo also installs the apps the module depends on: Invoicing and Employees. If you already use them, nothing you have changes.

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4 Activate FlexigoTech Cloud: the 14-day trial

Calls to Perk go through FlexigoTech Cloud, the FlexigoTech service that stores your credentials encrypted. Until the database is connected and the module has a trial or subscription, the connector does not talk to Perk.

1. **Click Activate in the top bar**
   It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.



- **Real Odoo 20 screenshot.** The activation window: read the list of data, tick the box and enter your email.

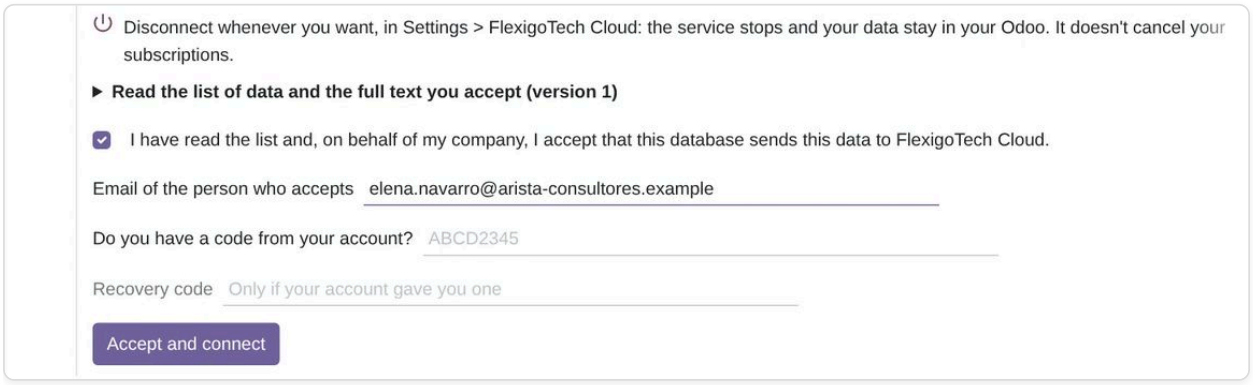
2. **Accept and enter your email**
   Tick «I have read the list and, on behalf of my company...» (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you leave it for later, **Later** closes the window.

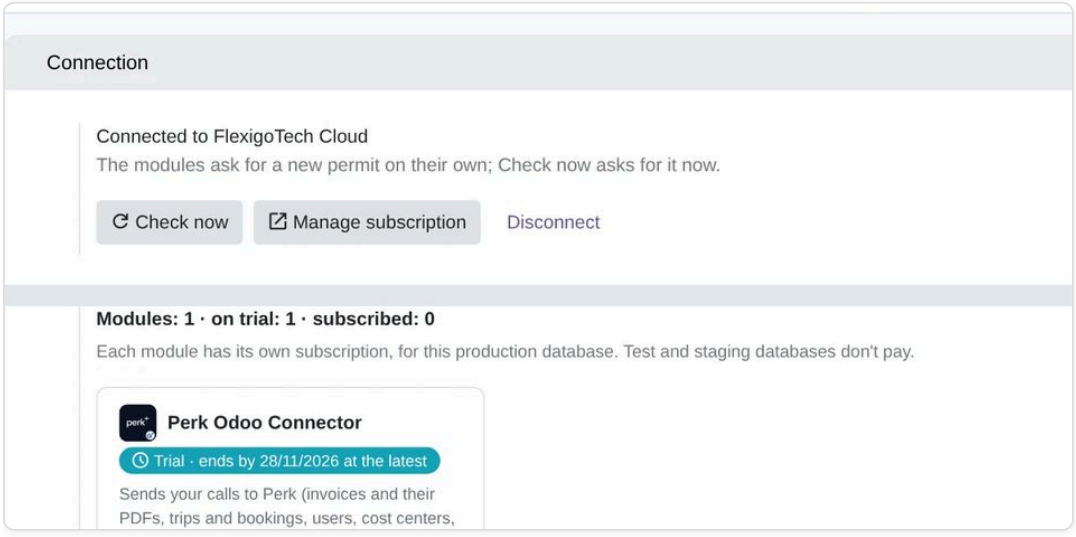
The same, from Settings

Settings › FlexigoTech Cloud has the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the ticked box, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

PLAN	PRICE	INCLUDES
Standard	€49 per month or €490 per year	Support response within 1 working day, up to 3 accounts
Pro	€98 per month or €980 per year	Response within 4 working hours, up to 10 accounts and a video call if needed

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** requests the permission immediately (otherwise the module renews it automatically every 6 hours).

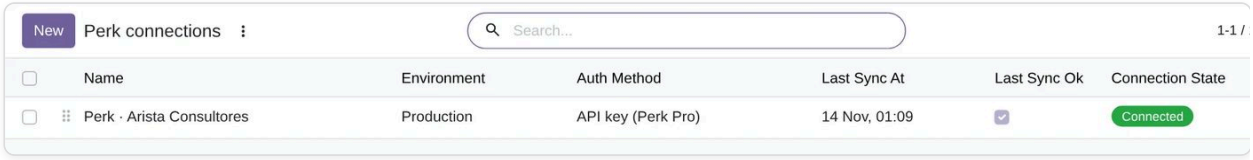
> On a neutralised copy (staging) or on a database with demo data you cannot start a trial: Settings says so with "This database is a neutralised copy or has demo data, so trials can't be started here.".

5 Connect Perk

Each connection with Perk is created in **Perk › Configuration › Connections**, which opens the **Perk connections** list.

1 Open the connections menu

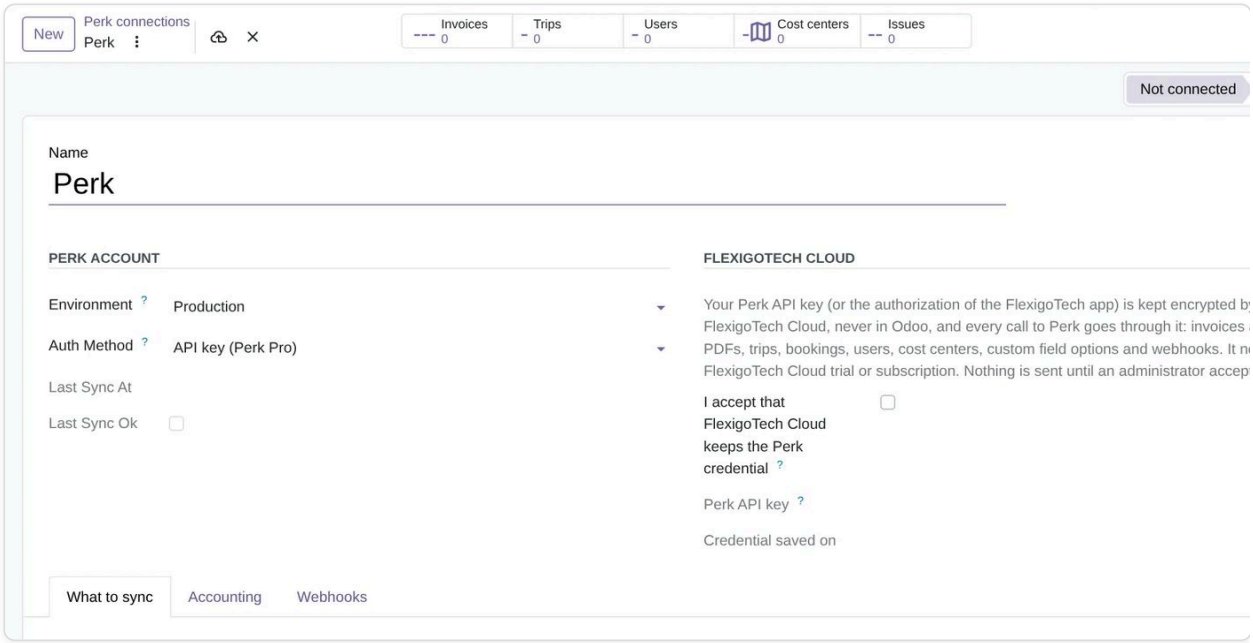
Go to **Perk › Configuration › Connections**. The connections you already have appear there.



- **Real Odoo 20 screenshot.** The connections list, with the environment, the authentication method and the status of each one.

2 Click New

An empty connection opens, in **Not connected** status. The **Test connection**, **Sync now** and **Disconnect** buttons do not appear until the key is saved.



- **Real Odoo 20 screenshot.** The new connection, with the **Perk account** data and the **FlexigoTech Cloud** section.

3 Fill in the Perk account

Enter a **Name** and choose the **Environment**: **Production** or **Sandbox (tests)**, which is Perk's free account with fictitious bookings. If you work with several companies, also choose the Odoo **Company** of the connection.

4 **Leave the Auth Method as API key (Perk Pro)**

That is the default. **Authorize with Perk** waits for Perk to activate the FlexigoTech application in production.

5 **Accept the consent**

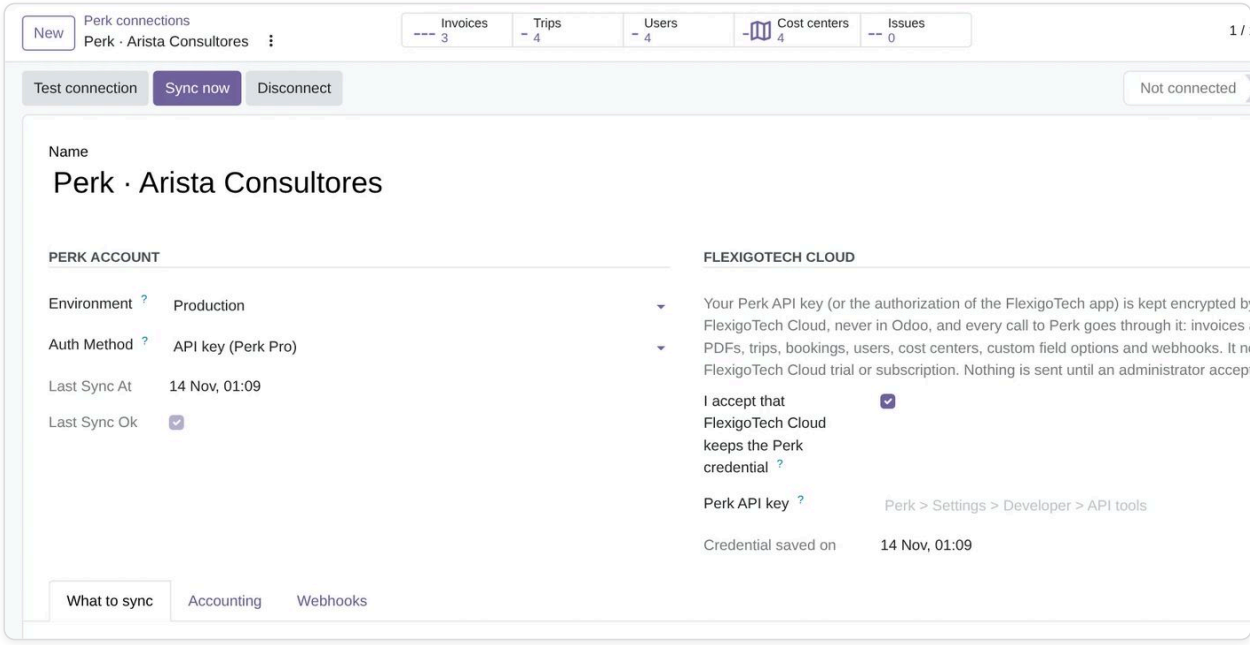
Tick **I accept that FlexigoTech Cloud keeps the Perk credential**. Without that box nothing is sent to FlexigoTech Cloud, and the key field does not accept input.

6 **Paste the key and save**

Paste the key into **Perk API key** and save. The key goes to FlexigoTech Cloud, which stores it encrypted, and the connection changes to **Connected**. Odoo does not keep it. If you later change the method or the environment, the stored key stops being valid: the connection goes back to **Not connected** and the key must be pasted again.

7 **Test the connection**

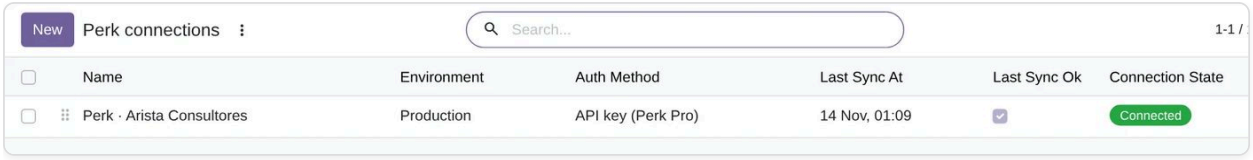
Click **Test connection**. Odoo asks Perk for your company's legal entities and tells you how many it sees. If Perk rejects the key, it tells you with its message.



- **Real Odoo 20 screenshot.** The connection in **Connected** status, with the date of the **Last Sync At**.

> Only an administrator can enter the key, accept the consent and click **Disconnect**. Creating the connection, changing its options and using the other buttons can also be done by an accounting manager. Without that consent, Odoo warns you that nothing has been sent. The FlexigoTech Cloud plan limits how many Perk connections you can have: up to 3 with Standard and up to 10 with Pro.

Once connected, the data arrives on its own. The scheduled task **Perk: sync invoices, trips, users and cost centers** runs every 30 minutes, and the **Perk: webhook queue** as soon as Perk sends a notification and, in case anything is left over, every hour. If you do not want to wait, click **Sync now**. Each synchronisation is recorded in **Perk › Configuration › Sync log**.

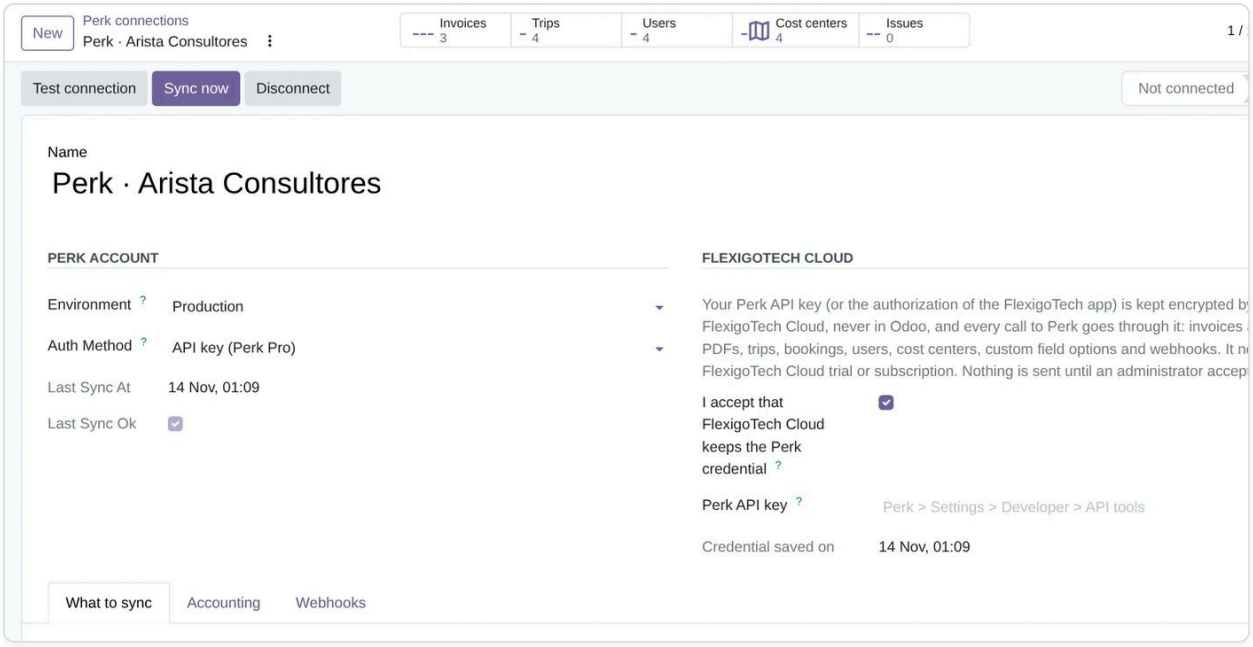


- **Real Odoo 20 screenshot.** The **Perk connections** list with the connection already connected.

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6 The connection options

These are the business options you choose in the connection in **Perk › Configuration › Connections** and the value they have when you create it.



- **Real Odoo 20 screenshot.** The Perk connection with its options and the **Test connection**, **Sync now** and **Disconnect** buttons.

OPTION	ON CREATION	WHAT IT DOES
Company	The company active at that moment	It is the main Odoo company of the connection. Perk's legal entities can be sent to other companies.
Environment	**Production**	Choose between **Production** and **Sandbox (tests)**, Perk's free environment with fictitious bookings.
Auth Method	**API key (Perk Pro)**	The other option, **Authorize with Perk**, waits for Perk to activate the FlexigoTech application in production.
Invoices as vendor bills	On	Brings in Perk's invoices and creates vendor bills.
Trips and bookings	On	Brings in trips and their bookings.
Perk users (link to employees)	On	Brings in Perk users and links them to your employees.
Employees to Perk	**From the wizard only**	With **Automatically on every change**, Odoo employees are sent to Perk on every change: new hires, changes, managers and leavers.

OPTION	ON CREATION	WHAT IT DOES
Cost Center Mode	**Off**	Passes Odoo analytic accounts to Perk cost centres, or the other way round. Asks you to choose the **Cost center plan**.
Project Mode	**Off**	Syncs analytic accounts with the options of a Perk custom field. Asks for the **Project plan** and the **Perk custom field ID (projects)**.
Import invoices issued from	30 days before the connection is created	Date from which Perk invoices are imported.
Vendor bills	**Draft, to review**	With **Posted when everything matches**, the vendor bill is posted if its total matches Perk's, and if Perk already marks it as paid, it is paid through the **Card payments journal** of its legal entity, if it has one.
Travel supplier as vendor on intermediary invoices	Off	With intermediary Perk invoices, the expense goes to the travel supplier, such as the airline, and not to Perk.
Perk vendor	Empty	This is the vendor on the invoices when the Perk legal entity has no other.

The two analytic modes need different plans: if you choose the same plan for cost centres and for projects, Odoo warns you with "Projects and cost centers need two different analytic plans.". If you change the projects field, the trips from the last 90 days are read again to pick up their project.

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7 Perk invoices

Perk › Invoices lists the invoices Perk issues for your trips and, from each one, you can create the vendor bill in Odoo.



- **Real Odoo 20 screenshot.** The **Perk invoices** list with its state and the vendor bill for each one.

Where each piece of data comes from

Invoices arrive on their own through the scheduled task **Perk: sync invoices, trips, users and cost centers**, which runs every 30 minutes. The **Perk: webhook queue** task reads each Perk notification as soon as it arrives and, every hour, any that are left over. The record data comes from Perk and is not edited.

Record buttons

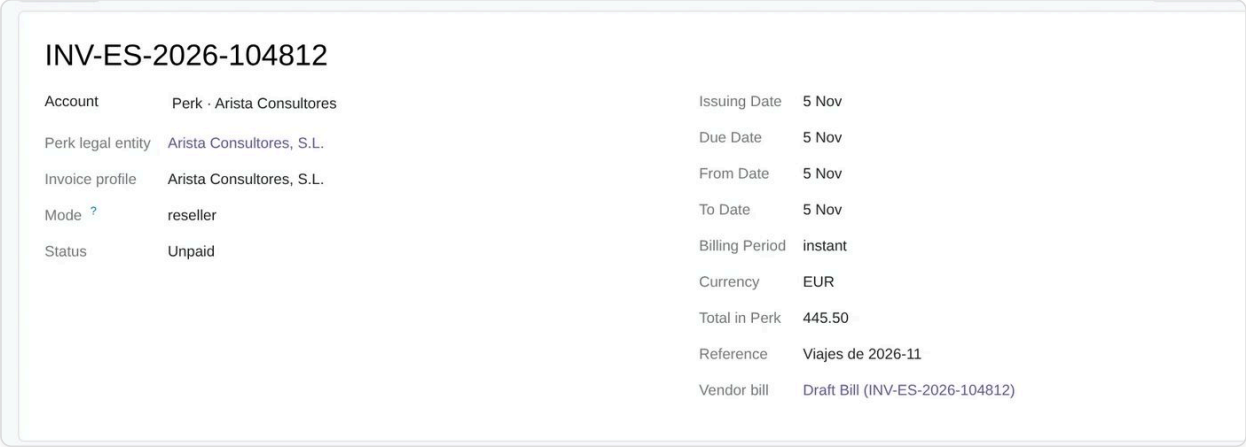
Create bill	Creates the vendor bill, or retries it. Only users with accounting manager permissions can see it, and it is hidden if the invoice already has a vendor bill or its state is **Bill created** or **Not an invoice**.

Open bill	Opens the vendor bill created. Only appears when the Perk invoice already has one.

States

To import	Waiting for its vendor bill to be created.
Bill created	The vendor bill already exists.
To review	The vendor bill is already created, but its total does not match Perk's: check the taxes before posting it.
Not an invoice	Perk sends it, but it is not an invoice: it is stored and not posted.
Error	The invoice could not be created. The reason is in **Error Message**.

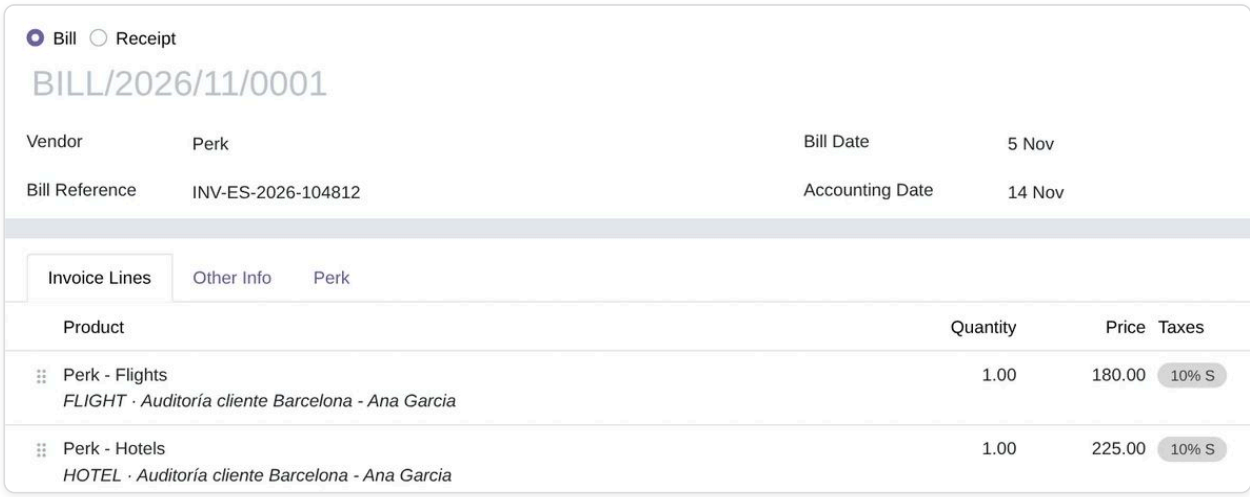
Separately, **State** shows whether Perk marks it as **Unpaid** or **Paid**.



- **Real Odoo 20 screenshot.** A Perk invoice with its **Vendor bill** already created, in draft.

Steps

1. **Open Perk › Invoices**
   You will see each invoice with its state and its vendor bill.
2. **Open an invoice in state To import or Error**
   Check its data and the error message, if there is one.
3. **Click Create bill**
   The vendor bill is created and the Perk invoice moves to **Bill created**.
4. **Click Open bill**
   The vendor bill created is opened.



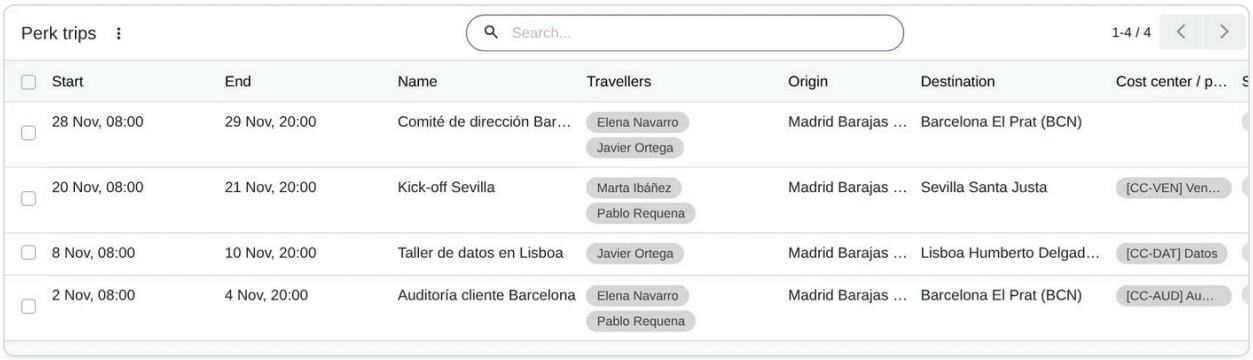
- **Real Odoo 20 screenshot.** The vendor bill in Odoo: Perk as the vendor, the Perk invoice number as the reference and, under **Invoice Lines**, the product, the tax and the traveller for each line.

> A Perk invoice that already has a vendor bill cannot be deleted: it would be imported again.

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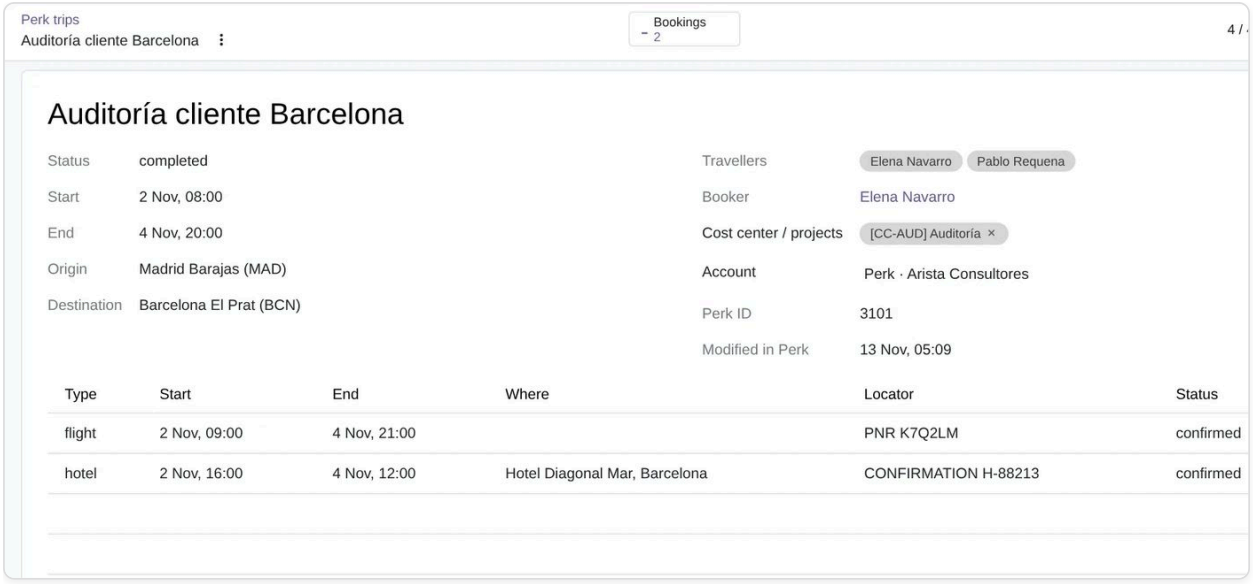
8 Trips and bookings

Here you see Perk trips with their traveller, origin, destination, dates, state and the bookings of each one.



- **Real Odoo 20 screenshot.** The **Perk trips** list with the dates, traveller, origin, destination and state of each trip.

They are opened from **Perk › Trips**. Trips arrive on their own: the scheduled task **Perk: sync invoices, trips, users and cost centers** brings them in every 30 minutes. The **Perk: webhook queue** task reads each Perk notification as soon as it arrives. Trip data is read-only: it is changed in Perk, not in Odoo.



- **Real Odoo 20 screenshot.** A trip with its traveller, its cost centre and the **Booking** tab.

Name	The name of the trip, as it is in Perk.
State	The state the trip has in Perk.
Start and **End**	When the trip starts and when it ends.
Origin and **Destination**	Where the traveller departs from and where they are going.
Traveler	The employees who travel.
Booker	Who made the booking in Perk.
Cost center / projects	The analytic accounts of the trip, with the project options the trip carries in its Perk custom fields.
Custom Fields	The custom fields the trip has in Perk.
Modified in Perk	The last time the trip was changed in Perk.
Booking	The bookings of the trip, with their **Kind**, **Start**, **End**, **Where**, **Locator** and **State**.

The states you see in the list, such as booked or completed, are the ones Perk sends and are shown as they are.

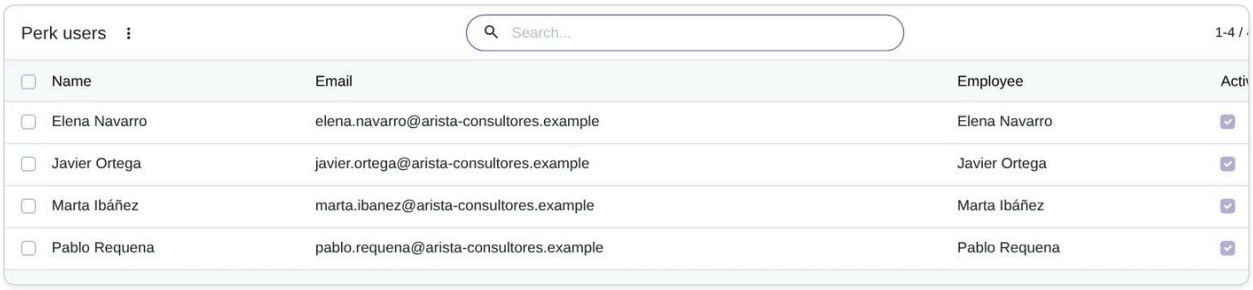
How to search

In the list you can filter **Upcoming** trips and group them by **State** or by **Month**. The calendar view shows who travels and when, month by month.

> Trips and bookings are not created or edited in Odoo: all their fields are read-only and are updated from Perk.

9 Users and employees

This section links each Perk user to their Odoo employee and lets you send to Perk the employees not yet registered.



- **Real Odoo 20 screenshot.** **Perk users** list with the employee linked to each user.

Perk users come into Odoo through the scheduled task **Perk: sync invoices, trips, users and cost centers**, which runs every 30 minutes. You find them under **Perk › Users**. In the list you see **Name**, **Email**, **Employee** and **Active in Perk**. The filters **Without employee** and **Inactive in Perk** help you locate those that need attention.

When a Perk user arrives in Odoo, it is linked to the employee who has that same work email, provided there is only one.

Buttons

Send to Perk (on the employee)	Opens the wizard to register or update that employee in Perk. Only those with accounting manager permission can see it.
Apply (in the wizard)	Writes to Perk what the preview shows. It is hidden when the wizard already has a **Result**.
Close (in the wizard)	Closes the wizard.

States

Each user shows whether they are active in Perk with the **Active in Perk** checkbox and, if it was sent from Odoo, the date of **Last sent to Perk**. In the wizard, each employee has an action: **Create in Perk**, **Update in Perk**, **Deactivate in Perk** or **Skip**.

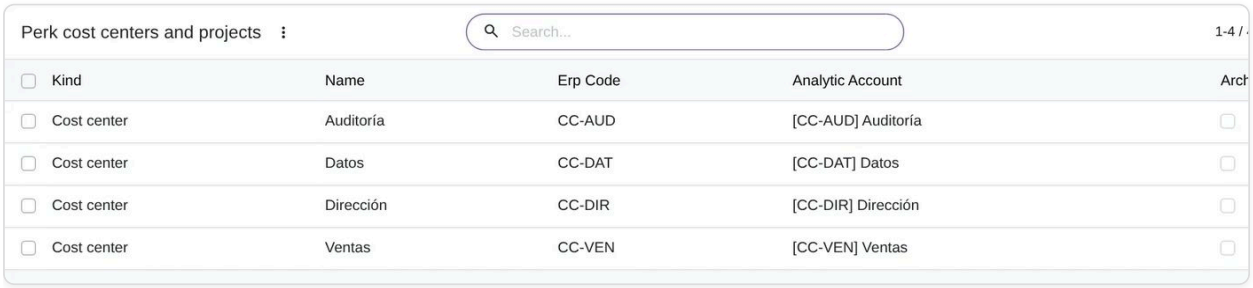
How an employee is sent

1. **Open the wizard**
   Click **Send to Perk** on the employee form, in the **Perk** group.
2. **Review the preview**
   Choose the **Account** and the **Employees**. The wizard proposes an action for each one and does not write anything to Perk yet.
3. **Click Apply**
   Perk creates, updates or deactivates the users. The **Result** is written in the wizard.

> If FlexigoTech Cloud pauses the call to Perk, the wizard stops and warns that nothing else was sent.

10 Cost centers and projects

Perk › Configuration › Cost centers and projects shows the cost centres and project options from Perk, each with its Odoo analytic account.



- **Real Odoo 20 screenshot.** List of **Perk cost centers and projects** with the ERP code and the analytic account of each centre.

These records are not created by hand: they are maintained by the scheduled action **Perk: sync invoices, trips, users and cost centers**, every 30 minutes, in the direction you choose on the connection. From Odoo to Perk, each analytic account in the chosen plan is created or updated in Perk, with its code as the **Erp Code**. From Perk to Odoo, each centre is matched with the analytic account in the plan that has its code or, failing that, its name, and if none exists one is created.

What you see on each record

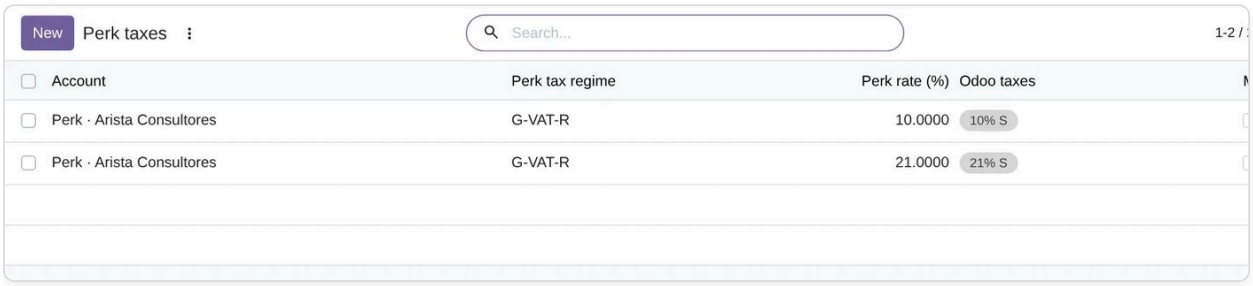
Kind	**Cost center** or **Project option**.
Name	The name it has in Perk.
Erp Code	The code used to match it with the analytic account.
Analytic Account	The linked Odoo analytic account.
Archived	Checkbox showing whether it is archived in Perk.
Perk ID	Identifier of the record in Perk.

To filter the list you have **Cost centers**, **Project options** and **Not linked**. All fields are read-only.

> There are no buttons in this list to create or edit centres: changes are made in the Odoo analytic accounts or in Perk, depending on the chosen direction, and they appear here at the next sync.

11 Taxes and products

Two lists under **Perk › Configuration** show which taxes and which Odoo product each line of the Perk invoices uses when it is booked.

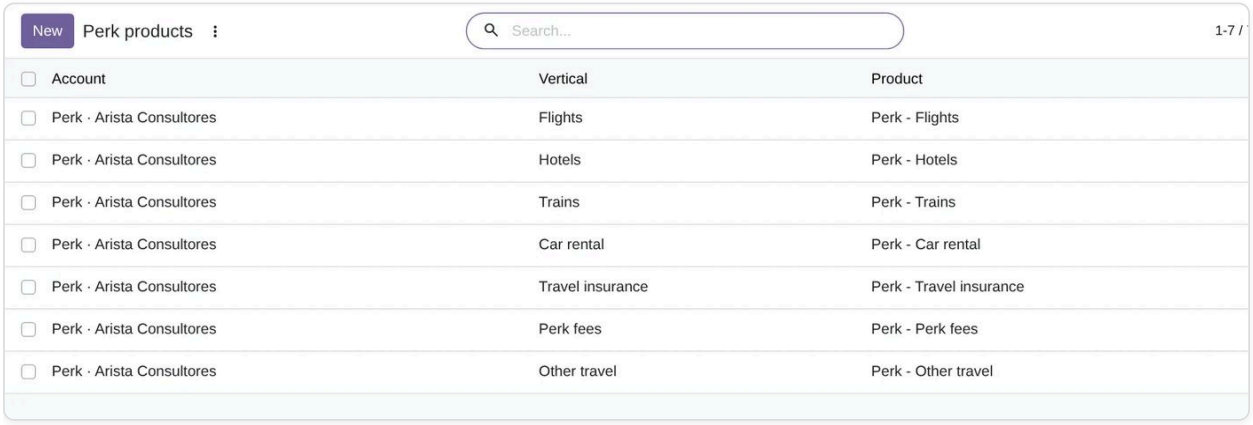


- **Real Odoo 20 screenshot.** The **Perk taxes** list with the **Perk tax regime** and the assigned **Odoo taxes**.

Both lists open from **Perk › Configuration › Taxes** and **Perk › Configuration › Products**. The product rows are created when you create the connection, one for each expense type. The tax rows are created the first time an invoice brings a scheme and a rate: the connector looks for a purchase tax of the company with that rate and marks the row with **Matched by the connector** ticked. If it finds none, the invoice ends up in **Error** and asks you to map it here. Lines under the STAR scheme and those at 0 % go without tax, unless you map one to them. With **New** you can add rows by hand.

Perk taxes

Account	The Perk connection the row belongs to.
Company	The Odoo company the mapping applies to.
Perk tax regime	The regime that comes on the Perk invoice, for example STAR (travel agencies) or G-VAT-R (general).
Perk rate (%)	The VAT rate on the Perk line, as a percentage.
Odoo taxes	The Odoo taxes applied to the line. If you leave it empty, the line goes without tax.
Matched by the connector	Read-only checkbox: marks the rows filled in by the connector.



- **Real Odoo 20 screenshot.** The **Perk products** list with one Odoo product for each **Vertical**.

Perk products

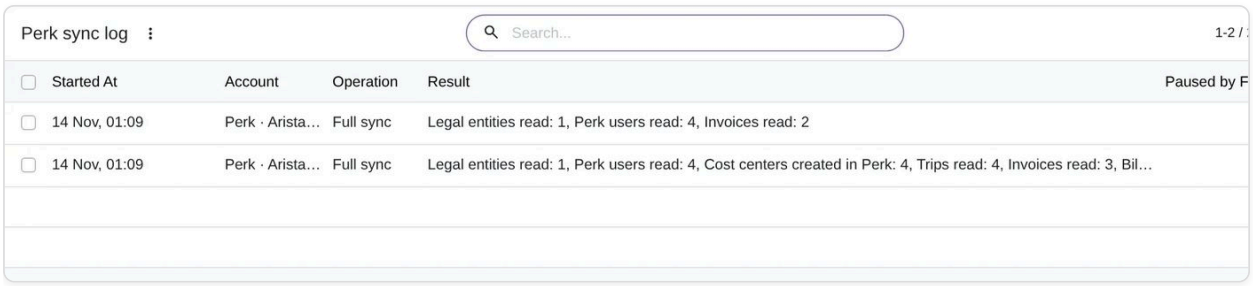
Account	The Perk connection.
Vertical	The expense type: **Flights**, **Hotels**, **Trains**, **Car rental**, **Travel insurance**, **Perk fees** or **Other travel**.
Product	The Odoo product applied to the lines of that expense type.

> Both lists are edited like any Odoo list. They have no buttons or states: what you change applies to the invoices imported afterwards.

USER MANUAL · PERK

12 Log, issues and webhooks

These three screens show what the connector has synced, what needs your attention and which notices Perk has sent.



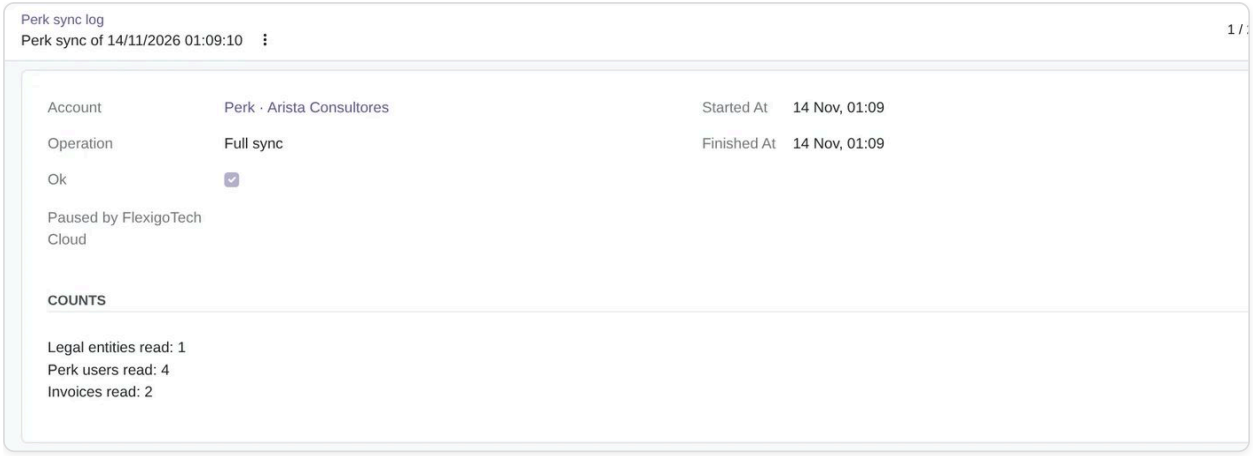
- **Real Odoo 20 screenshot.** The **Perk Sync Log** with the last two complete syncs.

Where each piece of data comes from

- The **Sync log** is filled by each run of the scheduled action **Perk: sync invoices, trips, users and cost centers**, which runs every 30 minutes.
- Notices in **Webhooks received** come from Perk, and the **Perk: webhook queue** action processes them as soon as they arrive and, if any remain, every hour.
- **Issues** appear when an invoice, a trip or another item could not be synced.

The sync log

You open it at **Perk › Configuration › Sync log**. Each line is a run. In the list you see **Started At**, **Account**, **Operation** and **Result**. When you open a line you also see **Finished At**, **Ok** and **Paused by FlexigoTech Cloud**, plus the groups **Counts** and **Problems**.



- **Real Odoo 20 screenshot.** An open run, with **Counts** and **Paused by FlexigoTech Cloud**.

Issues

In **Perk › Issues** you have the **Perk sync issues** list. Each line shows **When**, **Kind**, **Name**, **Message**, **Attempts** and **State**. When you open an open issue you see two buttons.

Retry	Runs the sync of that item again now.
Ignore	Marks the issue as ignored.

States

SCREEN	STATES
Issues	**Open**, **Solved**, **Ignored**
Webhooks received	**Pending**, **Done**, **Error**

> The **Retry** and **Ignore** buttons only appear with the issue in state **Open**. The logs, issues and webhooks are read-only: they are not edited by hand.

USER MANUAL · PERK

13 What happens automatically

The connector works on its own through two scheduled actions, which are switched on when it is installed.

TASK	FREQUENCY	WHAT IT DOES
Perk: sync invoices, trips, users and cost centers	Every 30 minutes, enabled	Goes through each connection with its saved credential and runs all the parts of the sync you have enabled. If one connection fails, it does not stop: it moves on to the others and records the result in the log.
Perk: webhook queue	Every hour, enabled	Processes the queue of notices that Perk sends to your Odoo. It starts as soon as a notice arrives, without waiting for the hour.

Frequencies are changed in **Settings › Technical › Automation › Scheduled Actions**, with developer mode activated. There you can also switch a task off.

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14 If something fails

These are the most common cases and where to look in each.

No trial or subscription	FlexigoTech Cloud pauses the calls to Perk and the sync stops. Check the box **Paused by FlexigoTech Cloud** in the sync log. Activate the trial or subscription in Settings.
All the connections in the plan are in use	Odoo warns that nothing was sent and about the plan limit. Disconnect a connection you no longer use or move to a plan with more connections.
Missing credentials or consent	An administrator has to accept, on the connection, that FlexigoTech Cloud stores the credentials and that the calls to Perk go through it. Until then nothing is sent to Perk.
Missing permission to change the connection	The key, the consent and **Disconnect** belong to an administrator. The connection options and buttons such as **Create bill** are also used by an accounting manager.
A Perk invoice does not generate its vendor bill	Open the invoice in **Perk › Invoices** and press **Create bill**. If it failed, check the reason in **Perk › Issues**, which is recorded on the issue. If the reason is an unassociated tax, associate it in **Perk › Configuration › Taxes** and press again.
You want to see what Perk replied	Open **Perk › Configuration › Sync log**: each run shows its counters and the problems it had. The notices Perk sends are in **Perk › Configuration › Webhooks received**.

When FlexigoTech Cloud pauses a call, the run stops and does not mark anything as failed. Pending items wait, and the next sync continues from where it stopped.

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15 No subscription, or uninstalling

What stops, what stays in your Odoo and what is deleted.

If the trial or subscription ends

FlexigoTech Cloud stops passing the calls to Perk and the sync halts: the log records it under **Paused by FlexigoTech Cloud**. What is already in your Odoo stays and can be read and exported: the vendor bills, the trips, the users and the cost centres. When the subscription returns, the sync continues from where it stopped.

If you uninstall the module

- The Perk API key is deleted from FlexigoTech Cloud.
- The vendor bills, the analytic accounts and the employees stay, because they belong to Odoo.
- The connector's lists (Perk invoices, trips, users, issues and the log) go with the module.
- Products created by the connector are deleted, except those already used by an invoice or another record, which remain as your products.

16 Support

Write to us for installation, configuration or any question. On the Standard plan we reply within 1 business day; on Pro, within 4 business hours, and if needed we can go through it by video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

Email

To install it, set it up or for any question.
comercial@flexigotech.com

On the web

The connector page, with the guide and the prices.
flexigotech.com/en/perk-connector-odoo.html

On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

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