Odoo Upgrades

The Odoo Upgrade Checklist

36 steps from planning to the first 30 days after go-live. Works for any version, including Odoo 18, 19 and 20.

Plan

4–8 weeks before

- [ ] Confirm your current Odoo version, edition (Community or Enterprise) and hosting (Odoo.sh, Online or on-premise).
- [ ] Choose the target version and check its support window (Odoo 20 is supported until September 2029, planned).
- [ ] List every installed module and mark it as standard, Enterprise, custom, OCA or App Store.
- [ ] Identify modules nobody uses any more; plan to uninstall them before the upgrade.
- [ ] List integrations: payment, shipping, eCommerce, banking, EDI, BI and any API clients.
- [ ] Agree an owner for testing in each department (finance, sales, warehouse, HR).
- [ ] Pick a go-live window outside month-end close and peak season.
- [ ] Get a module-by-module assessment and a quote before committing.

Prepare data and code

2–6 weeks before

- [ ] Take a full backup of the database and filestore, and test that it restores.
- [ ] Reconcile bank accounts and close open periods you can close.
- [ ] Record baseline figures: trial balance, stock valuation by product and location, open receivables and payables.
- [ ] Fix known data problems: duplicate partners, negative stock, unreconciled payments.
- [ ] Port custom modules to the target version for every version crossed (views, ORM, OWL JavaScript, reports, security files).
- [ ] Check each third-party app for a target-version release, or plan to port it.
- [ ] Freeze new customisations until go-live.

Test upgrade

1–4 weeks before

- [ ] Upgrade a copy of production, never the live database.
- [ ] Neutralise the test copy: disable outgoing email, bank synchronisation and payment providers.
- [ ] Check every module installs and every menu, list and form opens without errors.
- [ ] Compare the trial balance, stock valuation and receivables/payables against your baseline.
- [ ] Run the key business flows end to end: quote to cash, purchase to pay, manufacture, ship, invoice, pay.
- [ ] Test every integration and printed document (invoices, delivery slips, labels).
- [ ] Test user access rights role by role, especially custom security rules.
- [ ] Log issues, fix them, rebuild, and repeat until a round passes cleanly.

Go live

Cut-over day

- [ ] Announce the downtime window to users, customers and integration partners.
- [ ] Stop scheduled actions and integrations; let users log out.
- [ ] Take a final backup of the live database and filestore.
- [ ] Run the upgrade on fresh production data.
- [ ] Re-check the trial balance and stock valuation against the final backup.
- [ ] Re-enable scheduled actions and integrations one by one.
- [ ] Keep the original database available as a fallback.

After go-live

First 30 days

- [ ] Watch error logs, scheduled actions and integration queues daily for the first week.
- [ ] Collect user issues in one place and prioritise those blocking work.
- [ ] Train users on the changes that affect their daily work.
- [ ] Retire the custom modules that the new version made unnecessary.
- [ ] Delete temporary test copies once you are confident in the new system.
- [ ] Schedule the next upgrade: one hop a year costs far less than several at once.

Want this done for you?

TechUltra Upgrades runs every version hop, ports your custom modules, reconciles your financials and includes 30 days of hypercare. Get a free assessment at odooupgrades.com/contact.