**Discovery Findings**

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| *Jeff Russell - Three Stratum, LLC* | Monday March 14, 2016 |



**Executive Summary**

Mountain Meadow Herbs (MMH) currently has a deployment of Open ERP (Odoo) version 7 software currently running on internal server hardware. This implementation has been customized since initial deployment in 2014 and has several additional modules and modifications to extend functionality and conform to the Company’s business processes. MMH desires to further modify the software to bring functionality in line with its desired Manufacturing Process and streamline certain non-optimal workflows. In addition, a migration path to newer core Odoo version 9 software would be desirable so as to stay within the Long Term Support window of the product developer (Odoo, S.A.) as well as add new functionality that is of value to the business.

The Company is also planning development of a new e-commerce website for retail sales with a desired deployment date of June 2016. It is strongly desired to utilize the e-commerce framework of Odoo 9 in order to take advantage of built-in integration between e-commerce operations and existing ERP functionality (accounting, sales, manufacturing and shipping.)

MMH has a sister company Dr. Clark Research Association with a similar and complimentary business. Dr. Clark is currently in process of migrating operational software to Odoo version 8 for its US and European operations. Management has indicated that it would be advantageous to combine development efforts where applicable and where beneficial to both organizations.

**Recommendation**

Based on the results of the discovery process, Three Stratum recommends the following course of action for MMH:

1. Migrate the current Open ERP deployment to the Odoo version 9 platform with a target deployment not later than June 1, 2016 in order to accommodate the proposed new e-commerce site under Odoo.
2. Review all modifications and customizations of the current system on a one-by-one basis to ensure they adhere to the applicable MMH business processes. Bring these modifications forward to the version 9 system making any adjustments if necessary for process, workflow, or compatibility with Odoo 9.
3. Implement necessary modifications such that the ERP system conforms to the Manufacturing Process and Sales Process as outlined by MMH documentation.
4. Deploy source code management / revision control tools (Git) to manage the Odoo deployment going forward.
5. Where possible, make functional modules/processes of the system (eg. US shipping) compatible with sister company implementations (eg. Dr. Clark.)

A proposal for contract engagement to implement these recommendations is included below.

**Discovery Notes**

**Open ERP / Odoo**

1. All of the customizations done by Bista and Hucke are fairly well self-contained.
2. There appears to have been an attempt to test a migration to Odoo 8? What were the results?
3. Development and staging are all done on the same system. I would do development on a separate system, likely an AWS cloud instance.
4. There appear to be a few screens / functional areas that are not used. Some throw software error popups.
5. There are e-commerce connectors for both Prestashop and Magento platforms.
6. Odoo provides LTS on 3 concurrent versions. 7.0 will end LTS when 10 is released. Based on their release history I would anticipate that sometime in 2017.
7. The desire to implement a new e-commerce site using Odoo suggests a need to migrate MMH to Odoo 9 within a 3 month timeframe.
8. From the outstanding list of issues / enhancements are there items of importance that are pending?
   1. There appears to be ongoing modification work (last changes 2/29/16, 10/18/15, 9/3/15, 8/9-11/15)
   2. Will need to coordinate if ongoing work by multiple parties
9. Discussion of Manufacturing Process and changes needed in Odoo. Estimate for required changes pending further review; however, I estimate less than 7 days.
10. Estimate of time required to migrate to Odoo 9 is 10-15 days if under Odoo Enterprise Contract (there is assistance from Odoo S.A.) Without Enterprise Contract I estimate 20-25 days and am being conservative due to the number of unknowns.
11. David has indicated that it would be desirable to utilize work from the proposed project to potentially improve operational software for Dr. Clark.

**Other Observations**

1. Security
   1. Should disable remote login using passwords
   2. The server has pending OS updates that should be applied
   3. May want to restrict Odoo web access
2. Backups
   1. Have backups been tested?
   2. Is there an offsite (or cloud) copy kept?
   3. Should consider moving to automatic cloud backups
3. E-Commerce
   1. Will the new e-commerce / web store site be implemented in Odoo? <https://www.odoo.com/page/e-commerce>
   2. If not, what system will be used and does it have a supported interface module to Odoo?
   3. **David has stated that Atilus will utilize Odoo 9 for building the new site.**

**Proposal**

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| *Jeff Russell - Three Stratum, LLC* | Friday March 18, 2016 |



**Proposal**

Based on the recommendations from the discovery process, Three Stratum proposes the following engagement:

A fixed price project consisting of several components with duration of approximately 8 calendar weeks. During this time the following goals and deliverables will be met:

1. Migrate the current Open ERP deployment to the Odoo version 9 platform with a target deployment not later than June 1, 2016.
2. Review all modifications and customizations of the current system on a one-by-one basis to ensure they adhere to the applicable MMH business processes. Bring these modifications forward to the version 9 system making any adjustments if necessary for process, workflow, or compatibility with Odoo 9.
3. Implement necessary modifications such that the system conforms to the Manufacturing Process and Sales Process as outlined by MMH documentation.
4. Deploy source code management / revision control tools (Git) to manage the Odoo deployment and future revisions/upgrades.
5. Modifications and customizations requiring source code modifications to Odoo, built-in Oddo modules, third party modules, or MMH custom developed modules must have written approval from David P. Amrein and/or Kathy Garber.
6. Where possible, make functional modules/processes of the system (eg. US shipping) compatible with sister company implementations (eg. Dr. Clark.)

**Price: $8,400**

**Billing/Milestone Schedule:**

**Discovery: N/C**

**On Contract Signing: $2,100**

**April 6, 2016: $2,100**

* Git source management repository for all MMH/Odoo modules and documentation
* Functional Odoo 9 development server with basic (built-in) MMH customizations
* Database schema mapping for Open ERP 7 to Odoo 9 complete
* 30% MMH database migration to Odoo 9 complete

**April 27, 2016: $2,100**

* 100% MMH database migration to Odoo 9 complete
* All modules (built-in, Bista, and MMH custom) installed and in test/debug
* All modifications required for existing or new modules documented

**Upon Project Completion: $2,100**

* All modifications required for existing or new modules completed
* MMH system testing and user training complete
* Go live

**Accepted:**

**Mountain Meadow Herbs, Inc.: Three Stratum, LLC:**

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Name Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_**Principal Consultant**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title Title

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Date Date