

Graduation Project Proposal Form

1. Project Information

Project Title: Automobile (Cars oil change & Car Care products)

Code Group: NEXT13 _CAI1_ERP4_G1e

Course/Track: Odoo Application Track

Team Members:

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2. Project Overview

- **Objective:** Implement Odoo 17 EE with customizations tailored to user needs using Odoo Studio. This includes creating custom fields, modifying views, and automating business processes to enhance workflow efficiency, all within an on-premises hosting environment.
- **Scope of Work:** masters in an Automotive is a company specializes in cars oil changing. Currently they have two branches one in Egypt, and they have three warehouses one in Main and the two in site branches. Most of their customer individuals who own their personal cars, sometimes they deal with companies who have small fleet of cars. Later, they are planning to launch their e commerce website which will allow customers buy products and book appointments online. in the future they are planning to have door to door services, so when customer has an issue, they will go to his location and do the needful.
- **Expected Outcomes:**
 1. A fully customized Odoo 17 system: The system will include tailored features such as custom fields, views, and automated workflows, all created using Odoo Studio to meet specific business needs.
 2. Streamlined business operations: Automated processes will reduce manual intervention and improve overall efficiency across departments.
 3. User-friendly interface: The system will offer an intuitive interface with easy navigation, enhancing user adoption and experience.
 4. Enhanced reporting and insights: Custom reports and dashboards will provide clear and actionable insights to support decision-making.
 5. Scalability for Future Growth: A flexible system capable of supporting future enhancements and scalability as the business evolves.

3. TimeLine: 9 Months

1. Phase 1: Needs Assessment and System Setup (Month 1 - Month 2)

- Conduct detailed business analysis to identify requirements.
- Set up the Odoo 17 EE environment on-premises.
- Review and plan the necessary customizations.

2. Phase 2: Customization and Configuration (Month 3 - Month 5)

- Use Odoo Studio to create custom fields, modify views, and set up business process automation.
- Configure core modules such as Inventory, Sales, CRM, Accounting, etc.
- Integrate warehouses and branches into the system.

3. Phase 3: Testing and Validation (Month 6 - Month 7)

- Perform functional testing on customizations and workflows.
- Validate data migration (if applicable) and system performance.
- Get feedback from stakeholders and make necessary adjustments.

4. Phase 4: Training and Deployment (Month 8)

- Train key users and staff on the customized system.
- Finalize the system for production use and deploy across branches and warehouses.

5. Phase 5: Post-Deployment Support (Month 9)

- Provide ongoing support and fix any issues that arise.
- Monitor system performance and gather user feedback for future improvements.

4. Workflow

1. Workflow 1:

- i. Description: Pipeline and sales process
- ii. Legacy System(s)
 1. Manual paper quotations
- iii. Pain Points:
 1. Currently they don't use any tool to manage sales team pipeline, they got a phone calls or SMS on Facebook for their services but no one can track or manage customer requirements.
- iv. Risks: employees not familiar with Odoo/ need training
- v. Apps: CRM, Sales, Invoicing, Studio
 1. CRM:
 - a. The reason to use the CRM is to manage companies' requirements and to responds to customer inquiries.
 - b. They will use the email Elias to get all the customer inquiries in one place, so they will not lose customers.

- c. They want to create a sales team per branch location
 - 2. Sales & invoicing
 - a. They are getting customers via online ads and some promotion via their social media
 - b. They want to have a proper quotation to be send to companies, when they are dealing with big orders.
 - c. Their payment methods are (Cash/ Cards/ STC pay/ bank transfer)
 - d. Some companies ask them to send a proforma invoice
 - e. They want the customer to be able to sign the quotation online specially companies, to be prove of prices confirmation.
 - f. They want to add a terms and conditions in the quotations
 - g. Sometimes they are providing discounts depend on the market, so they want to activate the discount features.
 - 3. Studio:
 - a. They want to customize the customer profile by adding these fields (Car model, car name, how many times customer change oil / KM)
2. Workflow 2:
- i. Description: Managing their retail and warehouse cycle:
 - 1. Legacy System(s): Excel for product registration and tracking the product
 - 2. For POS they are created their own system which cannot support their need now.
 - ii. Pain Points:
 - 1. No clear way of tracking products in inventory
 - 2. Manual paper PO
 - iii. Apps:
 - 1. Purchase:
 - iv. They are dealing with 100 suppliers, located in Gulf countries, Germany and America.
 - 1. They issue PO with different currencies (Saudi riyals, Dollar and euros)
 - 2. Some of their products are (MTO)
 - 3. They have a fixed vendor price list for some of the suppliers.
 - 4. Sometimes they need to get manager approval in PO
 - v. Inventory:
 - 1. They have 2 warehouses one in Bahrain and the other one in UAE.
 - 2. They want to import all their currents products (500+)
 - 3. They want to have a barcode for each product as they already have their own barcodes, and they will provide it.
 - 4. They always doing internal transfers between the warehouses to the branches.
 - 5. They want to get a system notification if some of the product out of stock.
 - 6. They want to have reports for product move and stock adjustments.
 - vi. POS:
 - a. All products show be appearing in the POS, as some walk-in customer will buy only products.
 - b. They have 3 computers / laptops for POS, for each shift there's 3 sales will use the system.
 - c. They provide discounts and loyalty points.
 - d. They will use the POS system on computers or laptops
 - e. They want to activate product category.
 - f. Payment Methods is (cash / Visa/ MasterCard)
 - g. They want to print invoices.
3. Workflow 3:
- i. Description: Standalone apps (Accounting / Time off

1. Legacy System(s):
2. They are Excel for Accounting
- ii. Apps:
 1. Accounting:
 2. Happy to work with Odoo standard fully, they are not asking for more requirement.
- iii. Leaves / Time off:
- iv. Pain Points:
 1. All employees calling their shift manager or line manager to apply for their leaves or face to face.
 2. No proper leaves system everything done either by face to face or phone call
 3. They need the shift manager and HR manager can manage staff leaves request via Odoo. As Odoo standard.
 4. They have these kind of leaves (Annual leaves, Sick leaves, no payment leave)

5. APPS

Category	Module Name	Technical Name	Website
Accounting	Invoicing	account	https://www.odoo.com/app/invoicing
Accounting	Accounting	account_accountant	https://www.odoo.com/app/accounting
Attendances	Attendances	hr_attendance	https://www.odoo.com/app/employees
Calendar	Calendar	calendar	
Contracts	Employee Contracts	hr_contract	https://www.odoo.com/app/employees
CRM	CRM	crm	https://www.odoo.com/app/crm
CRM	Contacts	contacts	
Data Cleaning	Data Recycle	data_recycle	
Discuss	Discuss	mail	https://www.odoo.com/app/discuss
Documents	Documents	documents	https://www.odoo.com/app/documents
Email Marketing	Email Marketing	mass_mailing	https://www.odoo.com/app/email-marketing
Employees	Employees	hr	https://www.odoo.com/app/employees
Employees	Skills Management	hr_skills	
Expenses	Expenses	hr_expense	https://www.odoo.com/app/expenses
Internet of Things (IoT)	Internet of Things	iot	
Inventory	Inventory	stock	https://www.odoo.com/app/inventory
Inventory	Barcode	stock_barcode	
Payroll	Payroll	hr_payroll	

Point Of Sale	Point of Sale	point_of_sale	https://www.odoo.com/app/point-of-sale-shop
Project	Project	project	https://www.odoo.com/app/project
Purchase	Purchase	purchase	https://www.odoo.com/app/purchase
Recruitment	Recruitment	hr_recruitment	https://www.odoo.com/app/recruitment
Sales	Sales	sale_management	https://www.odoo.com/app/sales
Sign	Sign	sign	https://www.odoo.com/app/sign
Studio	Studio	web_studio	https://www.odoo.com/app/studio
Time Off	Time Off	hr_holidays	https://www.odoo.com/app/time-off
Timesheets	Timesheets	timesheet_grid	https://www.odoo.com/app/timesheet
To-Do	To-Do	project_todo	
Website	Website	website	https://www.odoo.com/app/website
Website	eCommerce	website_sale	https://www.odoo.com/app/ecommerce
Website	Online Jobs	website_hr_recruitment	