

**VIETNAM GENERAL CONFEDERATION OF LABOUR
TON DUC THANG UNIVERSITY
FACULTY OF INFORMATION TECHNOLOGY**



ENTERPRISE RESOURCE PLANNING

FINAL PROJECT REPORT

Instructor: **Ms. HỒ THỊ THANH TUYẾN**

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Class: 20H50204

Course: 24

HO CHI MINH CITY, 2023

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BIG ASSIGNMENT REPORT

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THANK YOU

Thank you, Ms. Ho Thi Thanh Tuyen, for being very enthusiastic in guiding and instructing me in forming knowledge for this essay. She always tries to make everything simpler and easier for me to absorb. Once again, thank you very much madam.

PROJECT COMPLETED AT TON DUC THANG UNIVERSITY

I hereby declare that this is my/our own project and is guided by Dr. Ho Thi Thanh Tuyen. The research contents and results in this topic are honest and have not been published in any form before. The data in the tables for analysis, comments and evaluation are collected by the author himself from different sources, clearly stated in the reference section.

In addition, the project also uses a number of comments, assessments as well as data of other authors, other agencies and organizations, with citations and source annotations.

If I find any fraud, I will take full responsibility for the content of my project. Ton Duc Thang University is not related to copyright and copyright violations caused by me during the implementation process (if any).

Ho Chi Minh City, Month 11 Date 23 Year 2023

Author

(Sign and write your full name)

Vũ Lê Tấn Phát

Nguyễn Minh Mẫn

Nguyễn Phạm Thanh Uyên

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The confirmation part of the instructor

Ho Chi Minh City, Month 11 Date 23 Year 2023

(Sign and write your full name)

The evaluation part of the teacher marks the test

Ho Chi Minh City, Month 11 date 23 year 2023

(Sign and write your full name)

SUMMARY

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INTRODUCTION

This report provides insights into the implementation of an Enterprise Resource Planning (ERP) system for "Odoo Milktea," a fictional bubble tea store. As part of the Introduction to ERP course for the academic semester 2023-2024, we explore the practical aspects of ERP integration within this business context.

Our objective is to showcase the successful execution of ERP processes using the Odoo platform. We will delve into organizational structure, HR processes, product management, CRM, SCM, data analysis with Power BI, and Odoo software architecture.

This report underscores the importance of ERP systems in enhancing operational efficiency and competitiveness in the dynamic bubble tea market.

TASK 1: Introduction of your fiction company including departments, organization chart, business processes

1.1 Company overview:

Company name: Bubble Tea Company

Headquarters: 250 Executive Park Blvd, Suite 3400 • San Francisco CA 94134 •

United States

Website: <https://odoo-milktea1.odoo.com/>

Email: bubbletea@bubbletea.com.vn

Brand logo:



Bubble Tea's Vision, Mission, and Core values:

- Vision: "Through creating unique drinks to contribute to the prosperity and development of Vietnamese society"
- Mission: "We are committed to bringing customers the best cups of milk tea, combining traditional flavours and creativity, creating a special meeting and sharing space."

- Core values: "To become the leading bubble tea brand in Vietnam."

Innovation

Responsibility

Quality

Customer-centric

1.2 The organizational structure of Bubble Tea company includes the following main departments:

1.2.1 Human Resources Department

- Responsible for recruiting, training, and developing employees, managing salaries and benefits, and resolving human resources related issues. Ensure legal regulations and company policies on human resources.
- The Human Resources department includes the Recruitment Department, the Compensation and Benefit Department, the Administrative Department, and the Training and Development Department.
- The Human Resources Department is in charge of human resources-related tasks such as recruitment, information management, work performance and developing compensation policies, ...

1.2.2 Finance Department

- Responsible for managing all activities related to accounting and company finance such as preparing financial reports, payroll, invoices, and customer payments.
- The Finance Department includes the Accounting Department, Finance Department, Budget Management Department, and Tax Department.
- The Finance Department is in charge of operating and managing all financial and accounting work of the company such as preparing financial reports, accounting, revenue and expenditure management, import-export inventory of raw materials and products, consumed goods, ...

1.2.3 Sales Department

- Responsible for promoting and distributing the company's products and services to customers.
- The Sales Department includes the Marketing Department, Sales and Distribution Department, Sales Management Department, and Customer Service Department.
- The sales department is in charge of tasks such as business strategy development, sales management, marketing and advertising strategy management, pricing and promotions, foreign affairs and public relations, ...

1.2.4 Production Department

- Responsible for managing the company's product manufacturing activities.
- The Production Department includes the Production Department, the Machinery and Equipment Operation Department, the Warehouse Department, and the Transportation Department.
- The production department is in charge of managing and operating the production process from planning, managing raw materials, necessary resources and monitoring the production process. In addition, it controls product quality, ensures compliance with standardized production processes, and ensures quality.

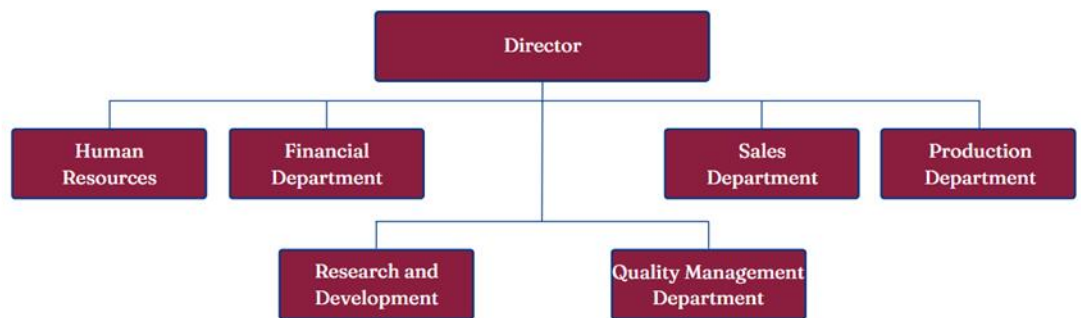
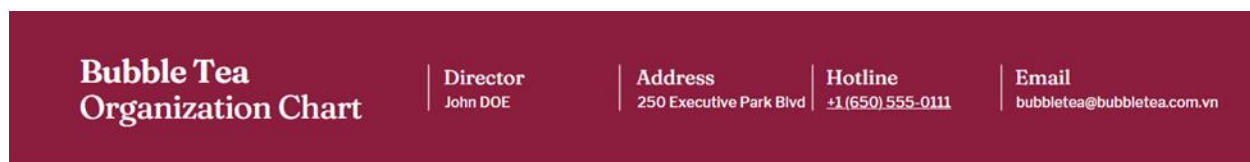
1.2.5 Research and Development Department

- Responsible for activities related to research and development of the company's products.
- The Research and Development Department includes the Product Research and Development Department, the Market Research Department, and the Product Testing and Evaluation Department.
- The Research and Development Department is in charge of researching and developing new products and improving the company's existing products, researching the market and capturing trends, ...

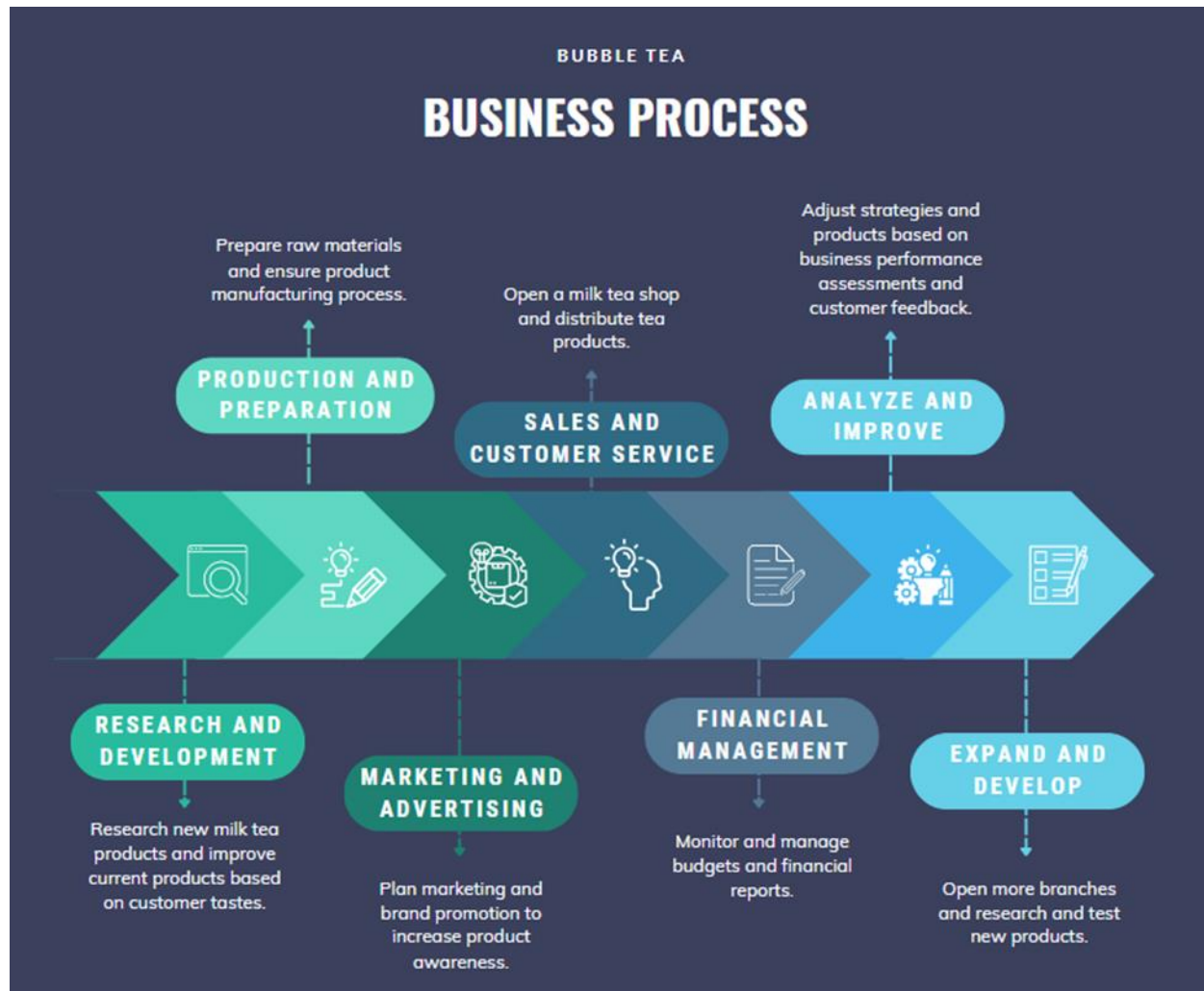
1.2.6 Quality Management Department

- Has the function of advising the company's board of directors on product quality management as well as issues related to product quality inspection, control, and improvement.
- The Quality Management Department includes the Quality Control Department, Product Evaluation Department, Food Safety and Hygiene Department, and Product Feedback and Improvement Management Department.
- The Quality Management Department is in charge of managing the standardization of quality management regulations and processes, organizing testing and product quality inspection, ...

1.2.7 Bubble Tea company organizational chart:



1.3 Bubble Tea company's business process:



TASK 2: Describe functions, tasks and processes of the human resources department (recruitment, timekeeping, payroll, reward, benefits, training,) of this fictional company and demo with Odoo

2.1 Functions of human resources department:

2.1.1 Recruitment:

The human resources department takes on the role of developing and implementing recruitment policies to attract qualified candidates. By creating and posting job ads on platforms, they can find potential candidates.

2.1.2 Timekeeping

The human resources department implements and manages the company's timekeeping system to track employee time and work performance. Ensure accuracy in recording specific working hours and resolve questions related to working hours.

2.1.3 Payroll

The human resources department is responsible for managing the payroll process, including calculating salaries, withholding taxes, and processing salary payments.

2.1.4 Rewards and Benefits

The human resources department is in charge of managing and rewarding employees, including reward and incentive policies if employees have excellent performance.

2.1.5 Benefit management

The human resources department manages employee benefit programs including health insurance, vacation days, retirement or other perks. In addition, the department also communicates information about benefits to employees and resolves issues and questions related to benefits.

2.1.6 Training and Development

The human resources department is responsible for developing training programs for employees on specific skills or knowledge. Additionally, monitor training progress and evaluate the effectiveness of programs.

2.2 Duties and Processes of the Human Resources department:

2.2.1 Recruitment process

Search for potential candidates

- Through interview rounds, screening is conducted to find suitable people.

2.2.2 Timekeeping process

- Deploy fingerprint or automatic timekeeping system.
- Manage employee time records.
- Resolve employee time-related issues.

2.2.3 Salary calculation process

- Determine employee working time including holidays through timesheets.
- Calculate salary, deductions and taxes.
- Processing payroll and salary distribution.
- Prepare salary reports and maintain records.

2.2.4 Reward process

- Develop employee evaluation criteria.
- Review and evaluate employee performance and efficiency.
- Distribute rewards to employees.

2.2.5 Benefits management process

- Enroll employees in benefit programs.
- Support employees with welfare-related issues.

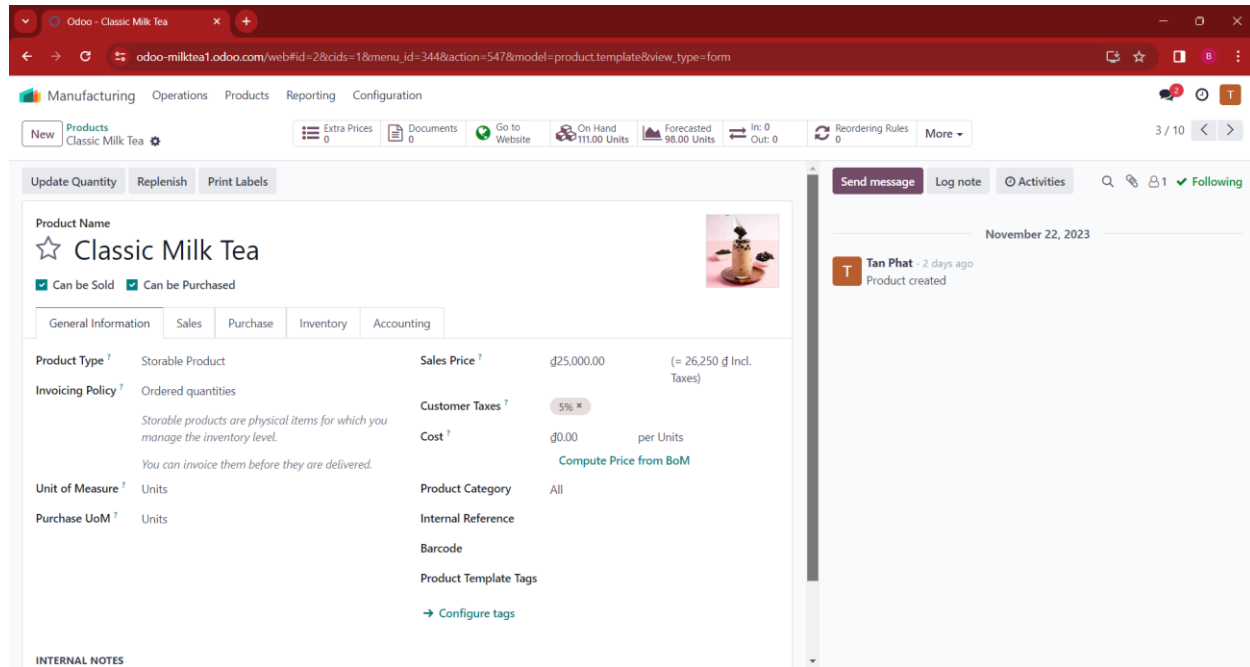
2.2.6 Training and development process

- Assess training needs through performance appraisals and skills assessments.
- Develop and implement specific knowledge or skills training programs.
- Monitor employee participation and evaluate training effectiveness.

TASK 3: Make-To-Stock process

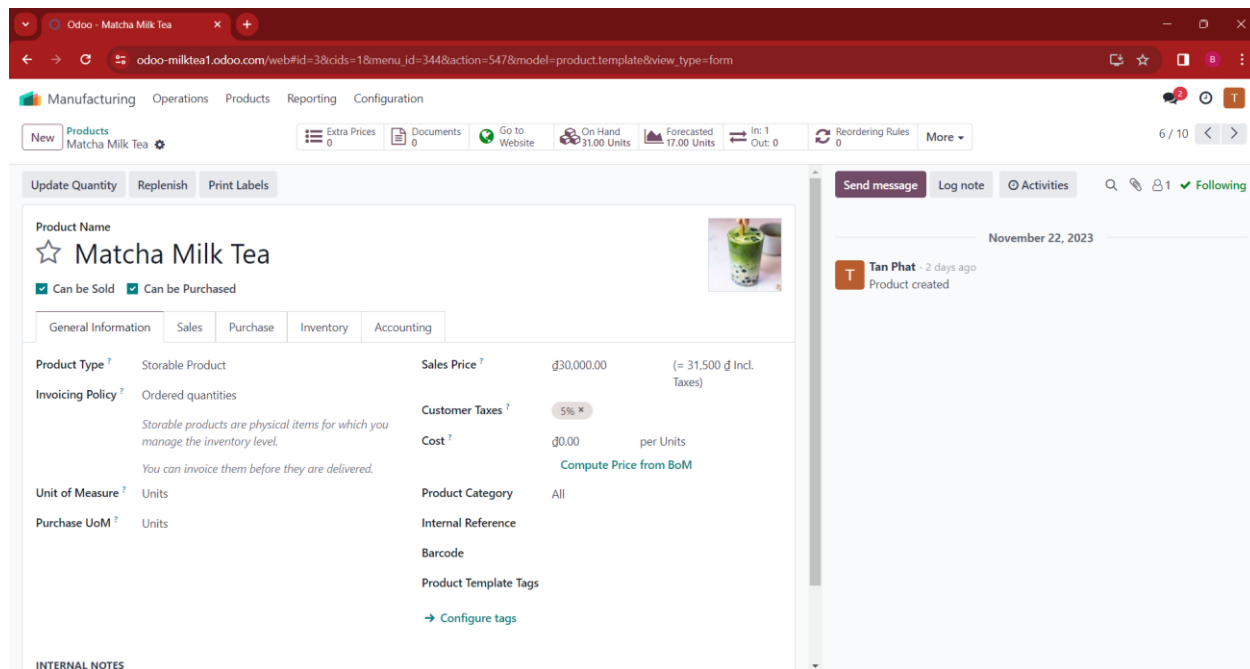
3.1 Create 2 products

Classic Milktea:



The screenshot shows the Odoo product form for 'Classic Milk Tea'. The browser address bar indicates the URL: `odoo-milktea1.odoo.com/web?id=2&cids=1&menu_id=344&action=547&model=product.template&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Products' with 'Classic Milk Tea' selected. The main form area has tabs for 'Update Quantity', 'Replenish', and 'Print Labels'. The product name is 'Classic Milk Tea' with a star icon and a small image of a milk tea drink. Below the name are checkboxes for 'Can be Sold' and 'Can be Purchased'. The 'General Information' tab is active, showing fields for 'Product Type' (Storable Product), 'Invoicing Policy' (Ordered quantities), 'Unit of Measure' (Units), 'Purchase UoM' (Units), 'Sales Price' (₫25,000.00), 'Customer Taxes' (5%), 'Cost' (₫0.00), 'Product Category' (All), 'Internal Reference', 'Barcode', and 'Product Template Tags'. A 'Configure tags' link is at the bottom. The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. A message from 'Tan Phat' dated 'November 22, 2023' is visible, stating 'Product created'.

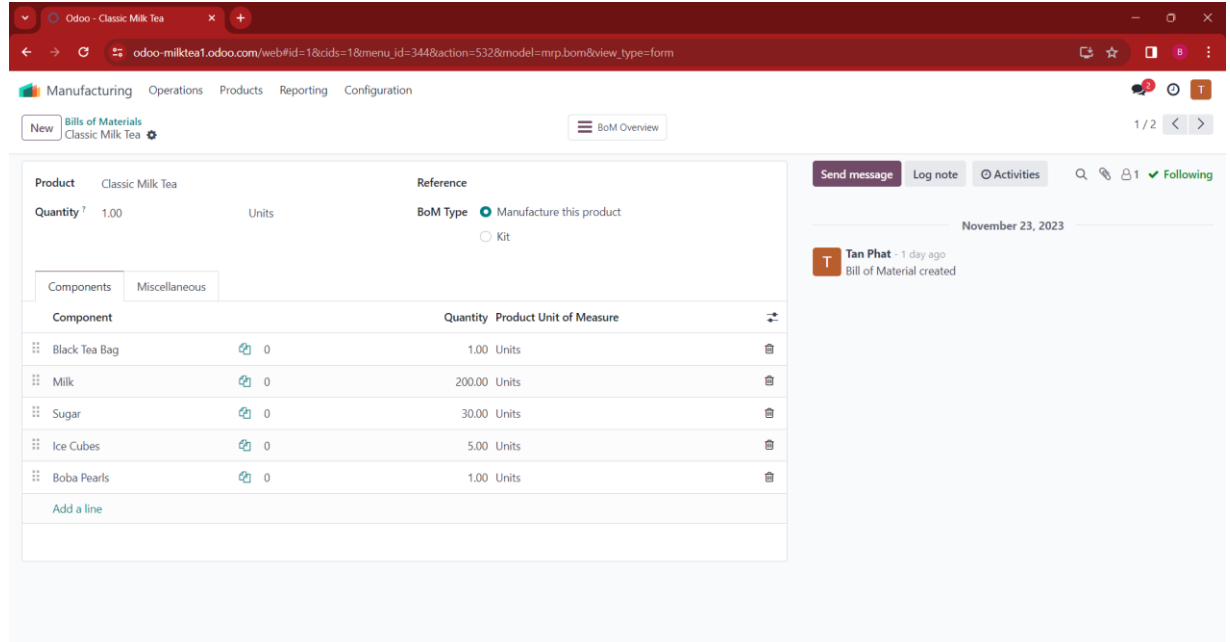
Matcha Milktea:



The screenshot shows the Odoo product form for 'Matcha Milk Tea'. The browser address bar indicates the URL: `odoo-milktea1.odoo.com/web?id=3&cids=1&menu_id=344&action=547&model=product.template&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Products' with 'Matcha Milk Tea' selected. The main form area has tabs for 'Update Quantity', 'Replenish', and 'Print Labels'. The product name is 'Matcha Milk Tea' with a star icon and a small image of a matcha milk tea drink. Below the name are checkboxes for 'Can be Sold' and 'Can be Purchased'. The 'General Information' tab is active, showing fields for 'Product Type' (Storable Product), 'Invoicing Policy' (Ordered quantities), 'Unit of Measure' (Units), 'Purchase UoM' (Units), 'Sales Price' (₫30,000.00), 'Customer Taxes' (5%), 'Cost' (₫0.00), 'Product Category' (All), 'Internal Reference', 'Barcode', and 'Product Template Tags'. A 'Configure tags' link is at the bottom. The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. A message from 'Tan Phat' dated 'November 22, 2023' is visible, stating 'Product created'.

3.2 Create BOM

Classic Milktea:

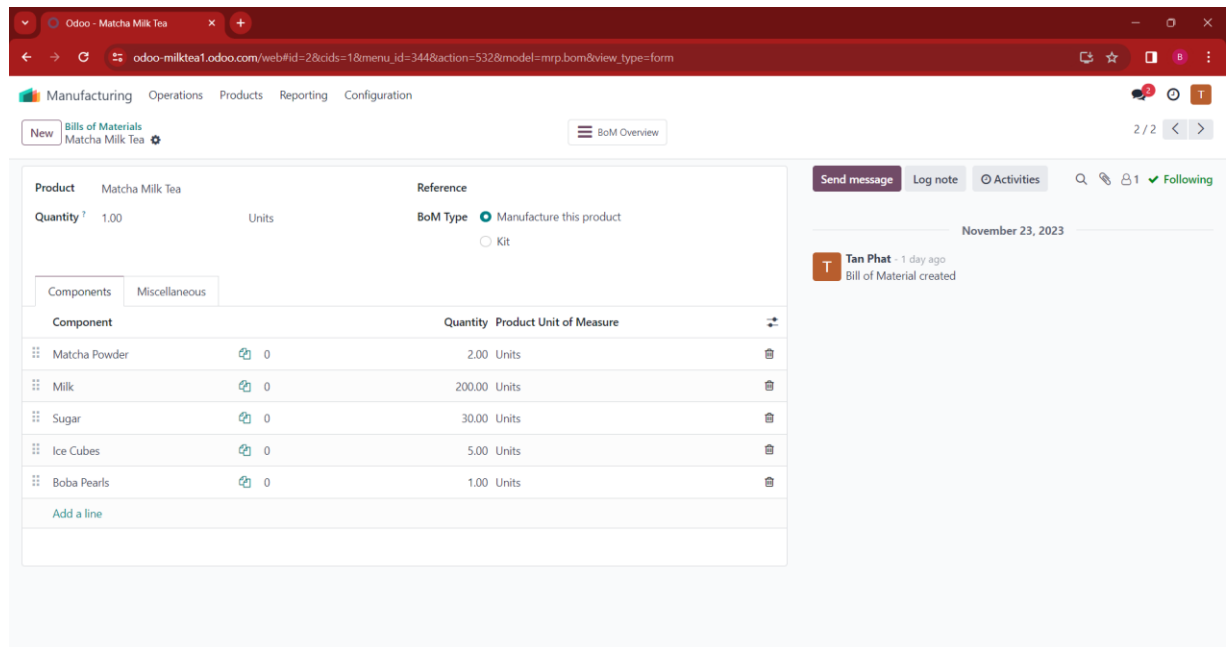


The screenshot shows the Odoo web interface for creating a Bill of Materials (BOM) for 'Classic Milk Tea'. The browser address bar shows the URL: `odoo-milktea1.odoo.com/web#id=1&cids=1&menu_id=344&action=532&model=mrp.bom&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Bills of Materials' and 'Classic Milk Tea'. The main form area has a 'Product' field set to 'Classic Milk Tea' and a 'Quantity' of '1.00'. The 'Reference' section shows 'BoM Type' with 'Manufacture this product' selected and 'Kit' unselected. Below this, there are two tabs: 'Components' and 'Miscellaneous'. The 'Components' tab is active, displaying a table with the following data:

Component	Quantity	Product	Unit of Measure
Black Tea Bag	0	1.00	Units
Milk	0	200.00	Units
Sugar	0	30.00	Units
Ice Cubes	0	5.00	Units
Boba Pearls	0	1.00	Units

At the bottom of the table, there is an 'Add a line' button. The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. Below this, there is a message from 'Tan Phat' dated '1 day ago' stating 'Bill of Material created'.

Matcha Milktea:



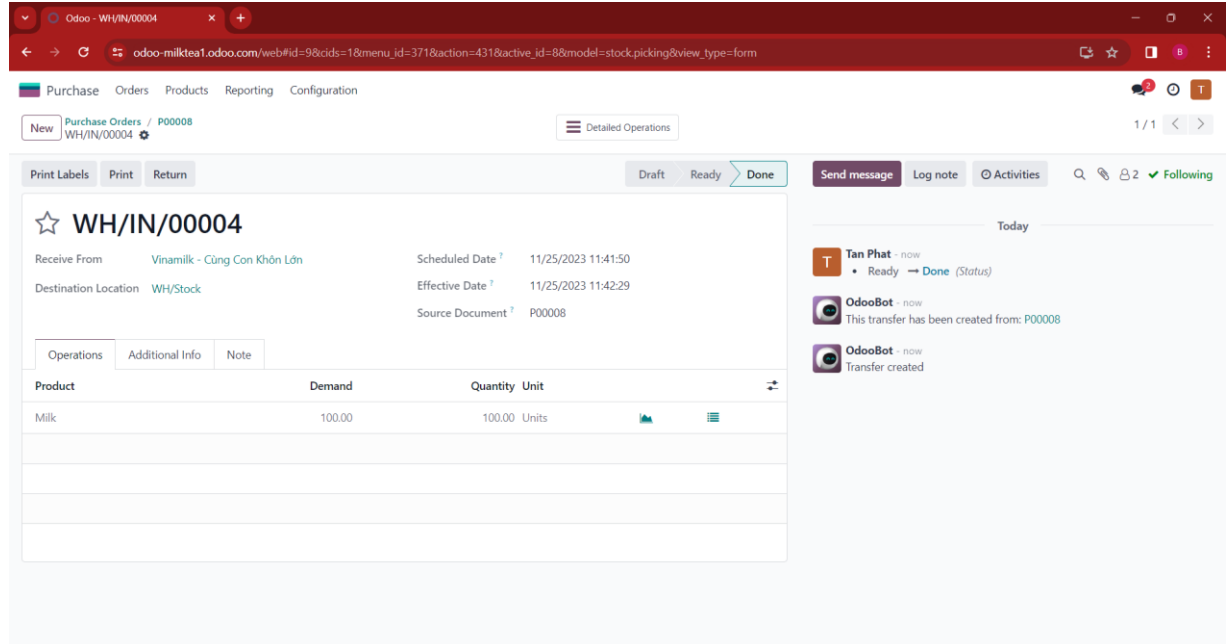
The screenshot shows the Odoo web interface for creating a Bill of Materials (BOM) for 'Matcha Milk Tea'. The browser address bar shows the URL: `odoo-milktea1.odoo.com/web#id=2&cids=1&menu_id=344&action=532&model=mrp.bom&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Bills of Materials' and 'Matcha Milk Tea'. The main form area has a 'Product' field set to 'Matcha Milk Tea' and a 'Quantity' of '1.00'. The 'Reference' section shows 'BoM Type' with 'Manufacture this product' selected and 'Kit' unselected. Below this, there are two tabs: 'Components' and 'Miscellaneous'. The 'Components' tab is active, displaying a table with the following data:

Component	Quantity	Product	Unit of Measure
Matcha Powder	0	2.00	Units
Milk	0	200.00	Units
Sugar	0	30.00	Units
Ice Cubes	0	5.00	Units
Boba Pearls	0	1.00	Units

At the bottom of the table, there is an 'Add a line' button. The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. Below this, there is a message from 'Tan Phat' dated '1 day ago' stating 'Bill of Material created'.

3.3 Purchase Raw Materials

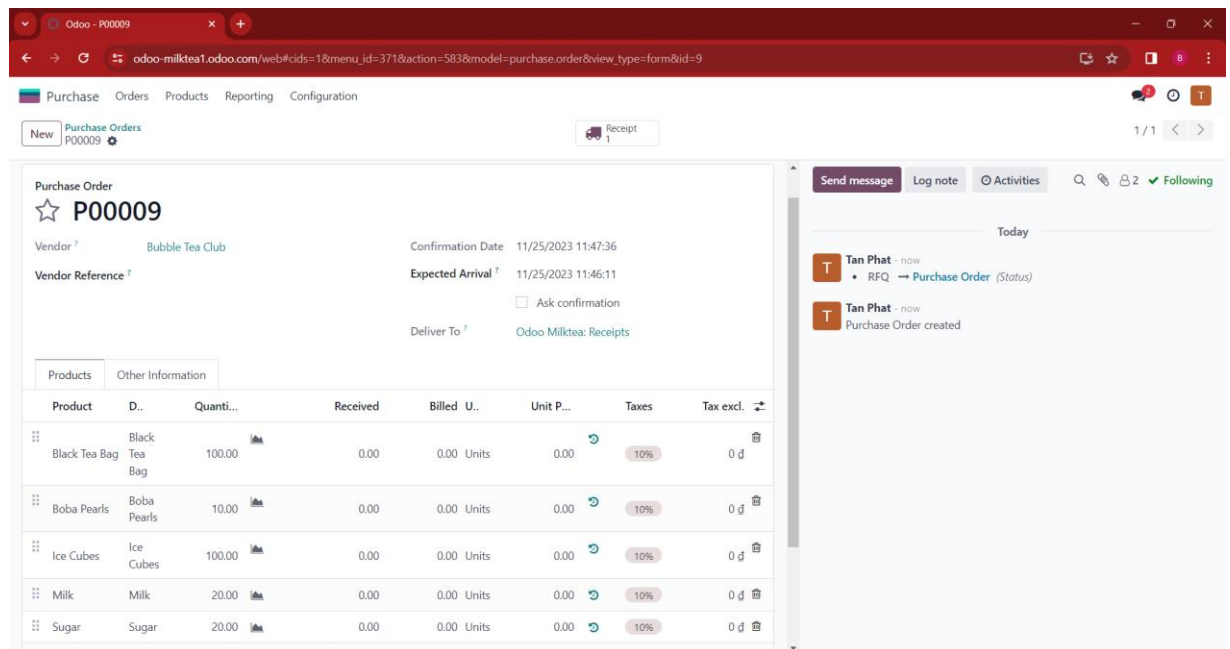
Buy milk from Vinamilk:



The screenshot shows the Odoo Stock Picking form for warehouse WH/IN/00004. The form is titled "WH/IN/00004" and includes fields for "Receive From" (Vinamilk - Cung Con Khon Lon), "Destination Location" (WH/Stock), "Scheduled Date" (11/25/2023 11:41:50), "Effective Date" (11/25/2023 11:42:29), and "Source Document" (P00008). The "Operations" tab is active, showing a table with columns: Product, Demand, Quantity, and Unit. The table contains one row for "Milk" with a demand of 100.00 and a quantity of 100.00 Units. The right sidebar shows a chat window with messages from Tan Phat and OdooBot.

Product	Demand	Quantity	Unit
Milk	100.00	100.00	Units

Buy the remaining milktea ingredients in Bubble Tea Club:

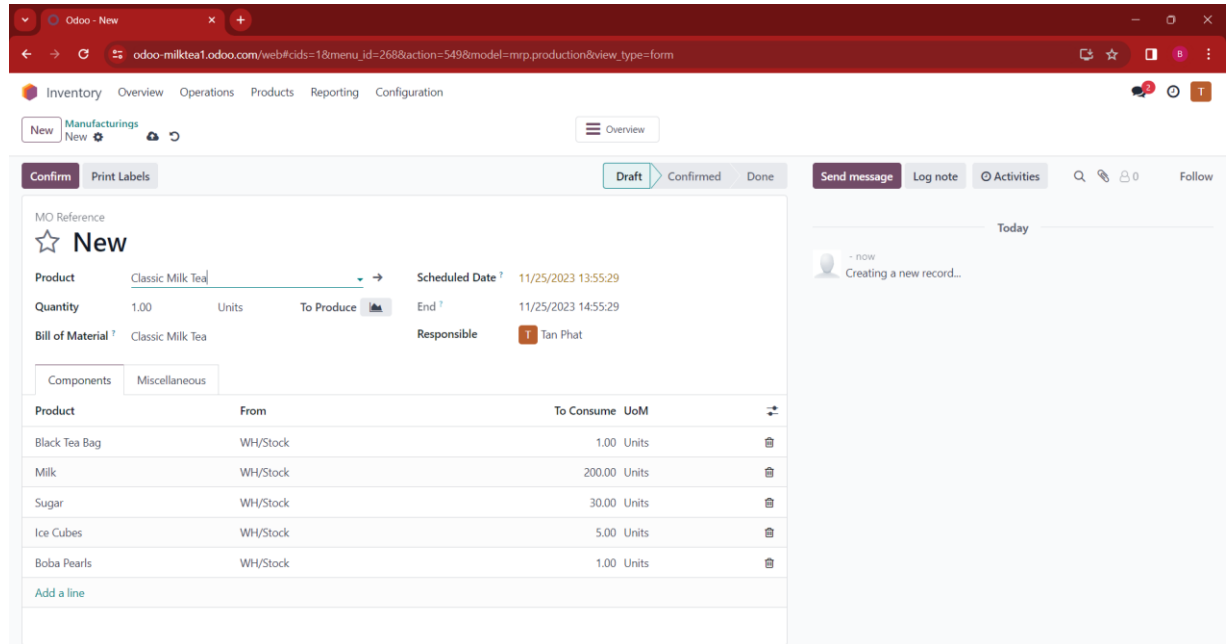


The screenshot shows the Odoo Purchase Order form for P00009. The form is titled "Purchase Order P00009" and includes fields for "Vendor" (Bubble Tea Club), "Confirmation Date" (11/25/2023 11:47:36), "Expected Arrival" (11/25/2023 11:46:11), and "Deliver To" (Odoo Milktea: Receipts). The "Products" tab is active, showing a table with columns: Product, D., Quanti..., Received, Billed U., Unit P..., Taxes, and Tax excl. The table contains five rows for "Black Tea Bag", "Boba Pearls", "Ice Cubes", "Milk", and "Sugar". The right sidebar shows a chat window with messages from Tan Phat and OdooBot.

Product	D.	Quanti...	Received	Billed U.	Unit P...	Taxes	Tax excl.
Black Tea Bag	Black Tea Bag	100.00	0.00	0.00	Units	0.00	0.00
Boba Pearls	Boba Pearls	10.00	0.00	0.00	Units	0.00	0.00
Ice Cubes	Ice Cubes	100.00	0.00	0.00	Units	0.00	0.00
Milk	Milk	20.00	0.00	0.00	Units	0.00	0.00
Sugar	Sugar	20.00	0.00	0.00	Units	0.00	0.00

3.4 Perform Production

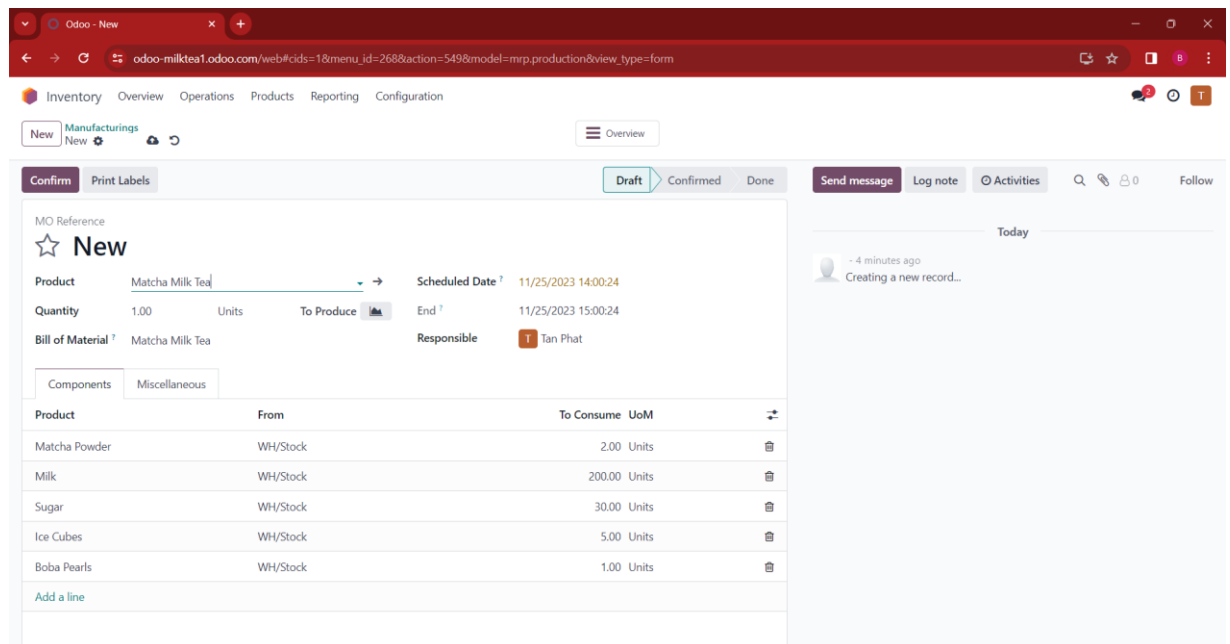
Classic Milktea: It's auto-filled because of BOM



The screenshot shows the 'New' form for a Manufacturing Order (MO) in Odoo. The form is titled 'New' and is for the product 'Classic Milk Tea'. The quantity is 1.00 units. The scheduled date is 11/25/2023 13:55:29. The end date is 11/25/2023 14:55:29. The responsible person is Tan Phat. The bill of material (BOM) is listed under the 'Components' tab.

Product	From	To Consume	UoM
Black Tea Bag	WH/Stock	1.00	Units
Milk	WH/Stock	200.00	Units
Sugar	WH/Stock	30.00	Units
Ice Cubes	WH/Stock	5.00	Units
Boba Pearls	WH/Stock	1.00	Units

Matcha Milktea: It's auto-filled because of BOM



The screenshot shows the 'New' form for a Manufacturing Order (MO) in Odoo. The form is titled 'New' and is for the product 'Matcha Milk Tea'. The quantity is 1.00 units. The scheduled date is 11/25/2023 14:00:24. The end date is 11/25/2023 15:00:24. The responsible person is Tan Phat. The bill of material (BOM) is listed under the 'Components' tab.

Product	From	To Consume	UoM
Matcha Powder	WH/Stock	2.00	Units
Milk	WH/Stock	200.00	Units
Sugar	WH/Stock	30.00	Units
Ice Cubes	WH/Stock	5.00	Units
Boba Pearls	WH/Stock	1.00	Units

3.5 Perform Quotations

The screenshot shows the Odoo Sales Order form for quotation S00010. The browser address bar indicates the URL: `odoo-milktea1.odoo.com/web#ids=1&menu_id=209&action=341&model=sale.order&view_type=form&id=10`. The top navigation bar includes Sales, Orders, To Invoice, Products, Reporting, and Configuration. The left sidebar shows the Quotations list with S00010 selected. The main form has tabs for Quotation, Quotation Sent, and Sales Order. The Sales Order tab is active, showing the order details and a table of order lines.

Order Details:

- Customer:** Tan Phat, 123 NGH, 213, 321 Salta 123, Argentina
- Order Date:** 11/25/2023 14:09:54
- Pricelist:** Default VND pricelist (VND)
- Payment Terms:**
- Invoice Address:** Tan Phat, Demo User
- Delivery Address:** Tan Phat, Tan Phat

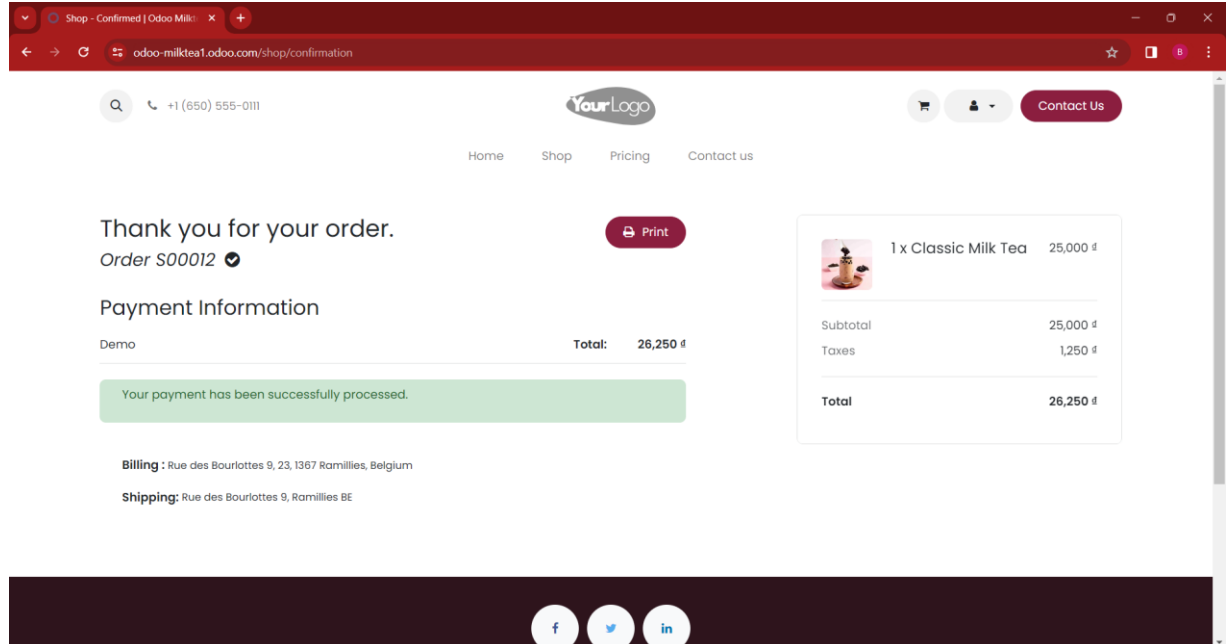
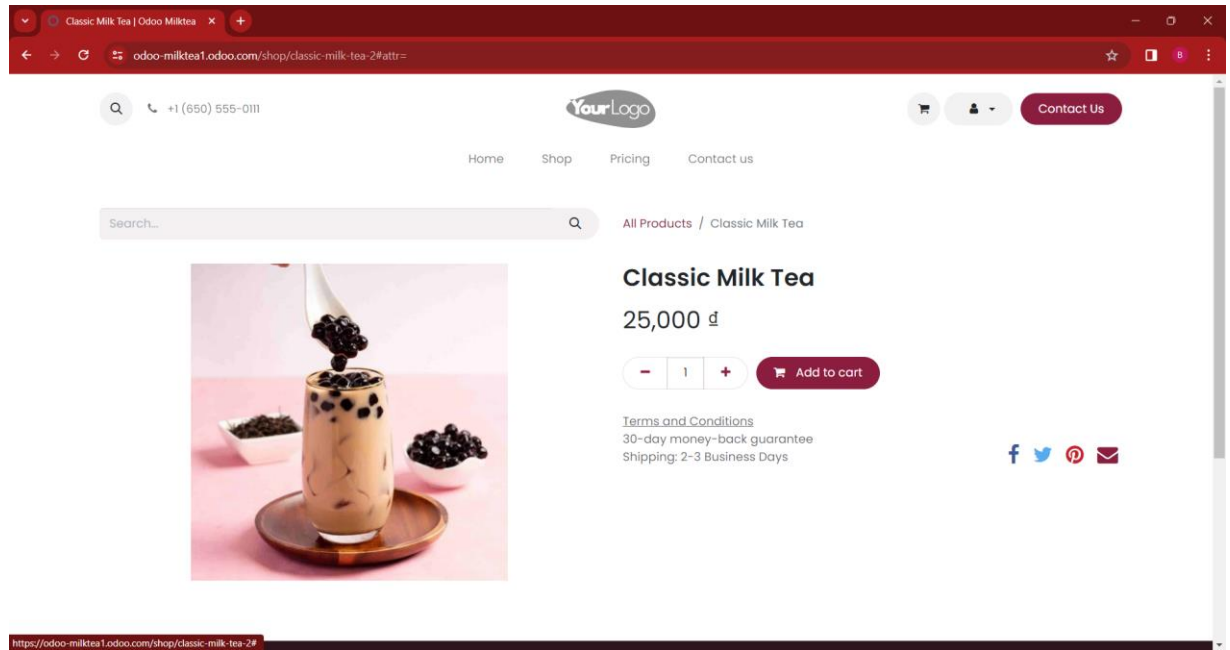
Order Lines Table:

Product	Description	Quantity	Invoiced	UoM	Unit Price	Taxes	Tax excl.
Classic Milk Tea	Classic Milk Tea	1.00	0.00	Units	25,000.00	5%	25,000
Matcha Milk Tea	Matcha Milk Tea	1.00	0.00	Units	30,000.00	5%	30,000

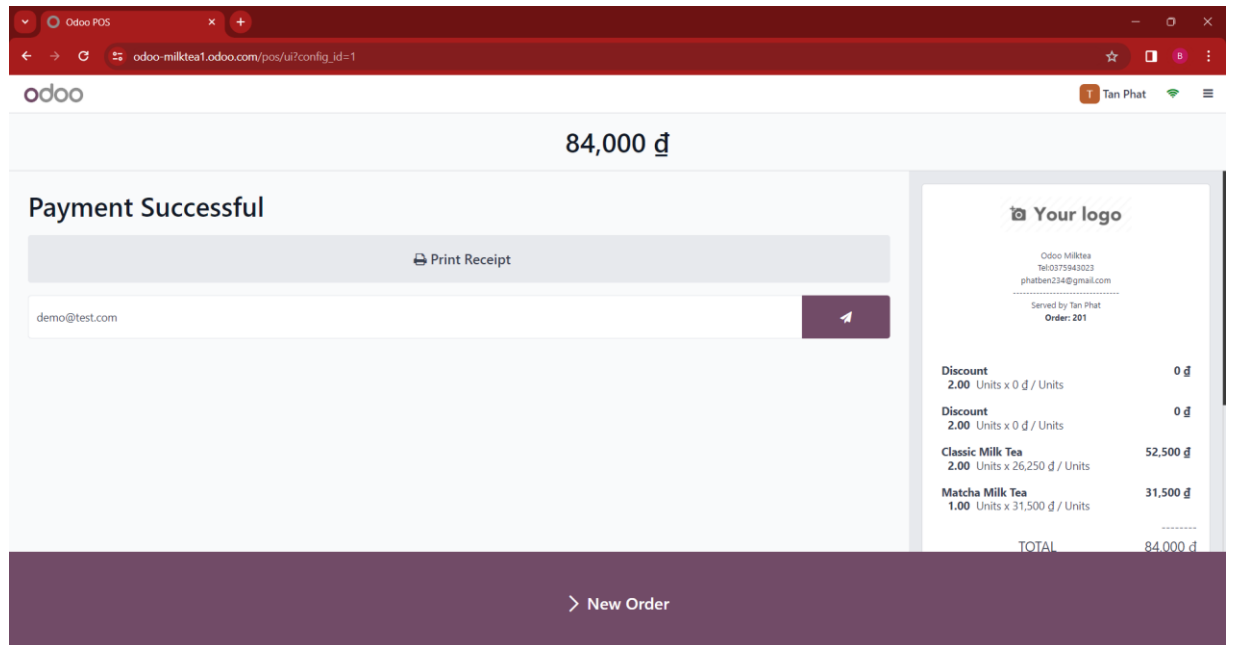
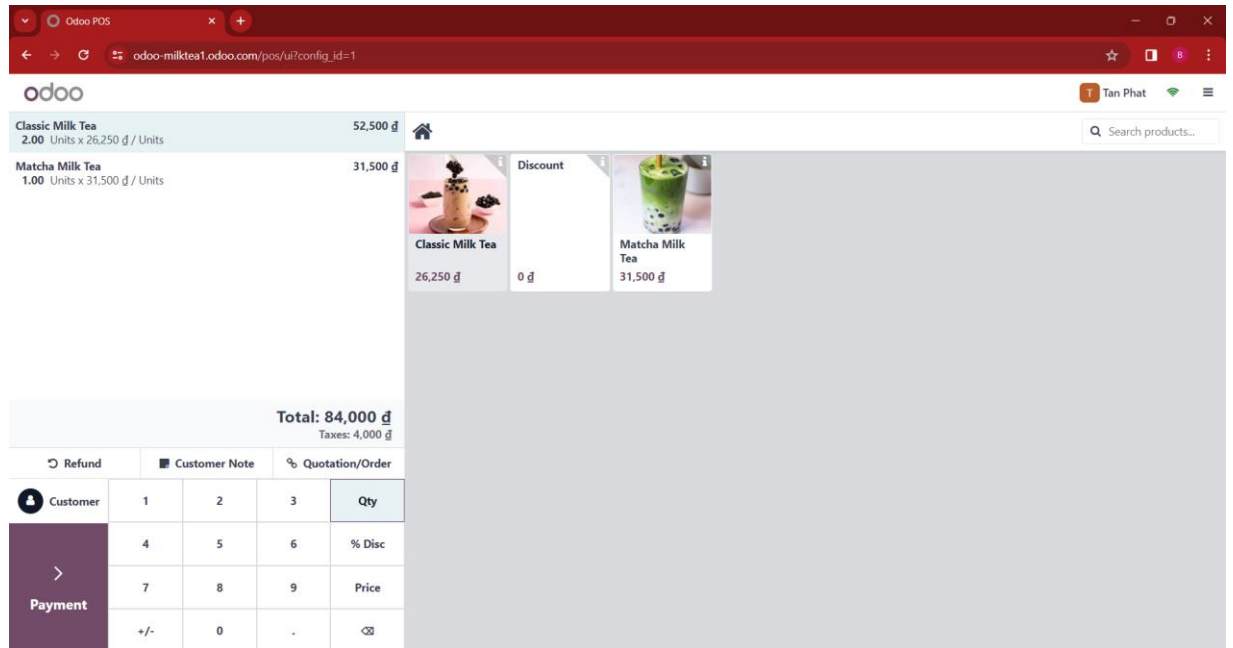
Activities:

- Tan Phat - now:** Quotation confirmed
 - Quotation → Sales Order (Status)
- Tan Phat - now:** Sales Order created

3.6 Buy via Web



3.7 Buy via POS



TASK 4: Make-To-Order process

4.1 Create BOM

Classic Milktea:

The screenshot shows the Odoo interface for the 'Classic Milk Tea' Bill of Materials (BOM). The browser address bar indicates the URL: `odoo-milktea1.odoo.com/web#id=1&cids=1&menu_id=344&action=532&model=mrp.bom&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Bills of Materials' and 'Classic Milk Tea'. The main form displays the product 'Classic Milk Tea' with a quantity of 1.00. The 'BoM Type' is set to 'Manufacture this product'. The 'Components' tab is active, showing a table of ingredients:

Component	Quantity	Product Unit of Measure
Black Tea Bag	0	1.00 Units
Milk	0	200.00 Units
Sugar	0	30.00 Units
Ice Cubes	0	5.00 Units
Boba Pearls	0	1.00 Units

The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. Below this, a message from 'Tan Phat' dated 'November 23, 2023' states 'Bill of Material created'.

Matcha Milktea:

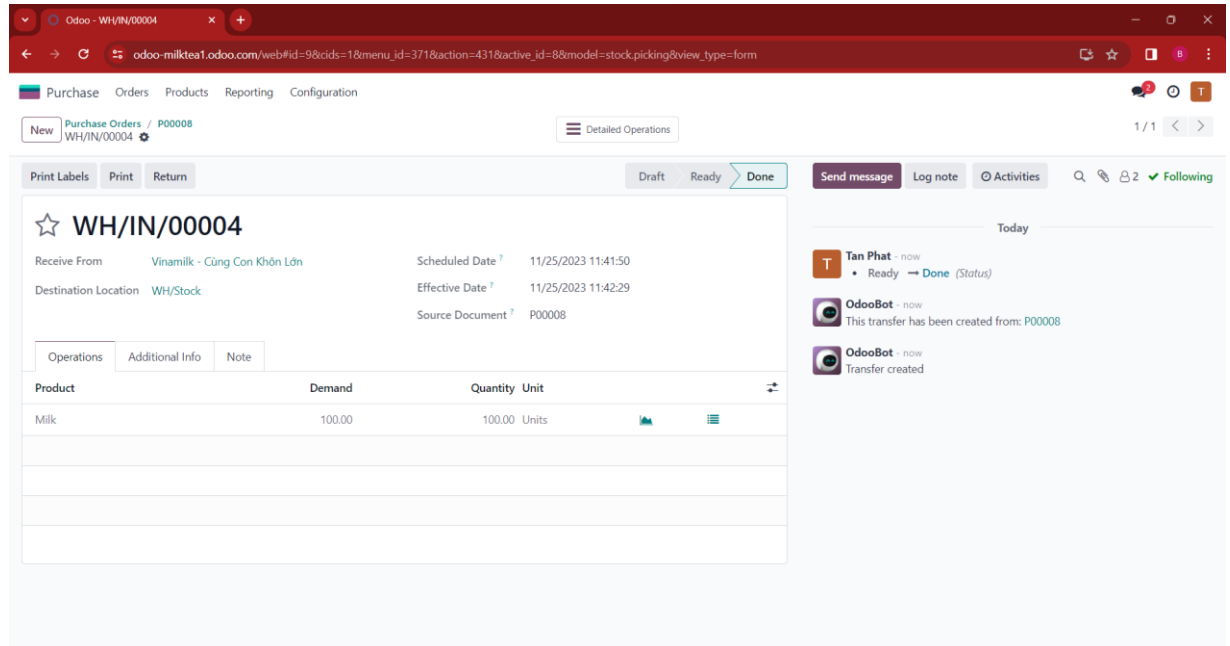
The screenshot shows the Odoo interface for the 'Matcha Milk Tea' Bill of Materials (BOM). The browser address bar indicates the URL: `odoo-milktea1.odoo.com/web#id=2&cids=1&menu_id=344&action=532&model=mrp.bom&view_type=form`. The top navigation bar includes 'Manufacturing', 'Operations', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'New Bills of Materials' and 'Matcha Milk Tea'. The main form displays the product 'Matcha Milk Tea' with a quantity of 1.00. The 'BoM Type' is set to 'Manufacture this product'. The 'Components' tab is active, showing a table of ingredients:

Component	Quantity	Product Unit of Measure
Matcha Powder	0	2.00 Units
Milk	0	200.00 Units
Sugar	0	30.00 Units
Ice Cubes	0	5.00 Units
Boba Pearls	0	1.00 Units

The right sidebar shows a 'Send message' button, 'Log note', 'Activities', and a search bar. Below this, a message from 'Tan Phat' dated 'November 23, 2023' states 'Bill of Material created'.

4.2 Purchase Raw Materials

Buy milk from Vinamilk:



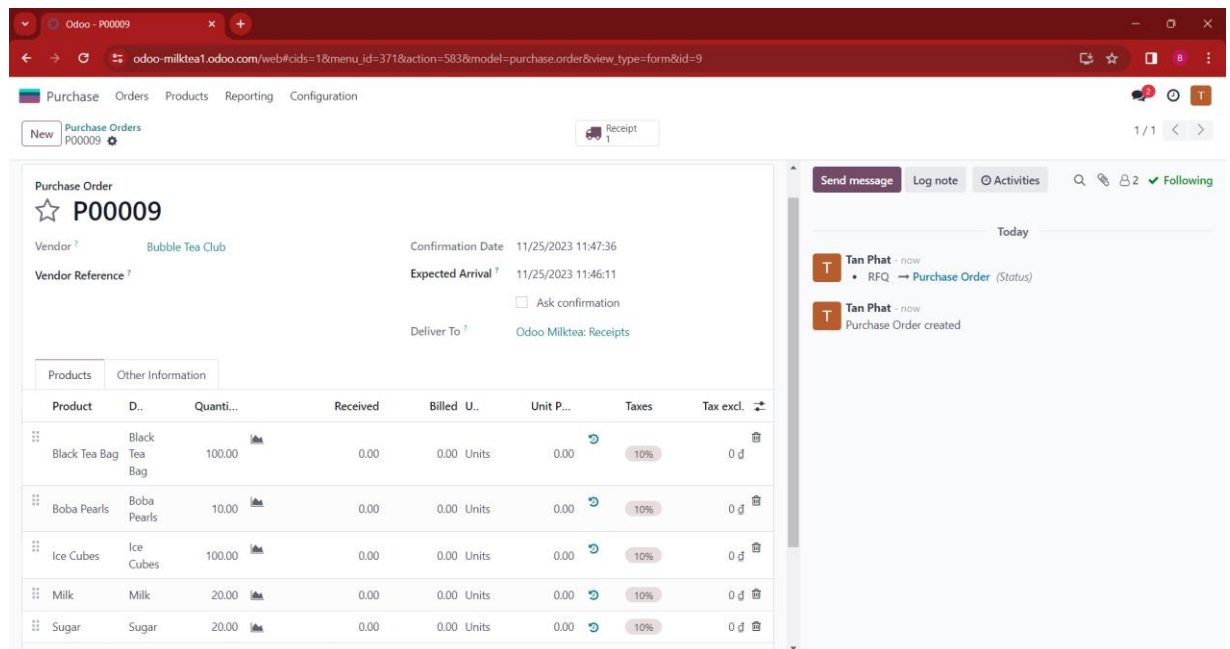
The screenshot shows the Odoo Purchase Order form for WH/IN/00004. The form is titled "Purchase Orders / P00008" and is in the "Done" state. The "Receive From" field is set to "Vinamilk - Cưng Con Khôn Lớn" and the "Destination Location" is "WH/Stock". The "Scheduled Date" is 11/25/2023 11:41:50, the "Effective Date" is 11/25/2023 11:42:29, and the "Source Document" is P00008. The "Operations" tab is active, showing a table with the following data:

Product	Demand	Quantity	Unit
Milk	100.00	100.00	Units

The right sidebar shows a chat window with messages from Tan Phat and OdooBot. The messages are:

- Tan Phat: Ready → Done (Status)
- OdooBot: This transfer has been created from: P00008
- OdooBot: Transfer created

Buy the remaining milktea ingredients in Bubble Tea Club:



The screenshot shows the Odoo Purchase Order form for P00009. The form is titled "Purchase Order" and is in the "Receipt" state. The "Vendor" field is set to "Bubble Tea Club" and the "Confirmation Date" is 11/25/2023 11:47:36. The "Expected Arrival" is 11/25/2023 11:46:11. The "Deliver To" field is set to "Odoo Milktea: Receipts". The "Products" tab is active, showing a table with the following data:

Product	D.	Quanti...	Received	Billed U.	Unit P...	Taxes	Tax excl.
Black Tea Bag	Black Tea Bag	100.00	0.00	0.00	Units	0.00	0.00
Boba Pearls	Boba Pearls	10.00	0.00	0.00	Units	0.00	0.00
Ice Cubes	Ice Cubes	100.00	0.00	0.00	Units	0.00	0.00
Milk	Milk	20.00	0.00	0.00	Units	0.00	0.00
Sugar	Sugar	20.00	0.00	0.00	Units	0.00	0.00

The right sidebar shows a chat window with messages from Tan Phat. The messages are:

- Tan Phat: RFQ → Purchase Order (Status)
- Tan Phat: Purchase Order created

4.3 Perform Sales Orders

S00011

Customer: Man Order Date: 11/25/2023 14:17:13
 Invoice Address: Man Pricelist: Default VND pricelist (VND)
 Delivery Address: Man Payment Terms:

Order Lines

Product	Description	Quantity	Invoiced	UoM	Unit Price	Taxes	Tax excl.
Classic Milk Tea	Classic Milk Tea	10.00	0.00	Units	25,000.00	5%	250,000 đ
Matcha Milk Tea	Matcha Milk Tea	10.00	0.00	Units	30,000.00	5%	300,000 đ
[Delivery_007] Standard delivery		1.00	0.00	Units	0.00		0 đ

Untaxed Amount: 550,000 đ
 VAT 5%: 27,500 đ
 Total: 577,500 đ

4.4 Proceeding with Production

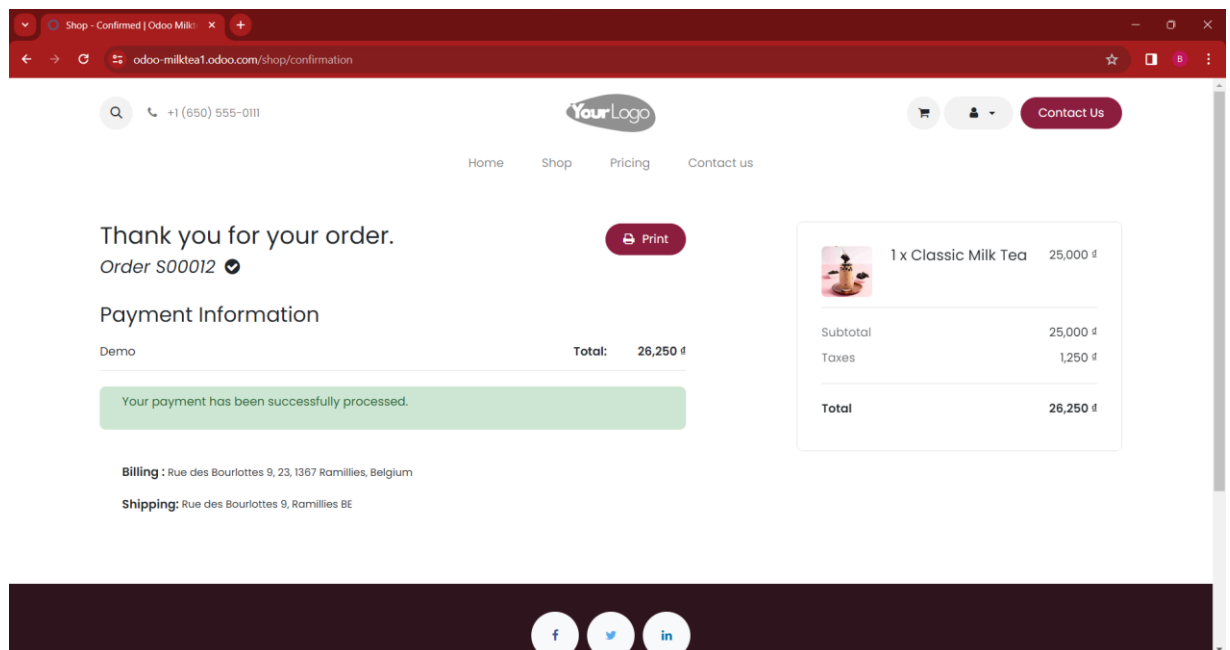
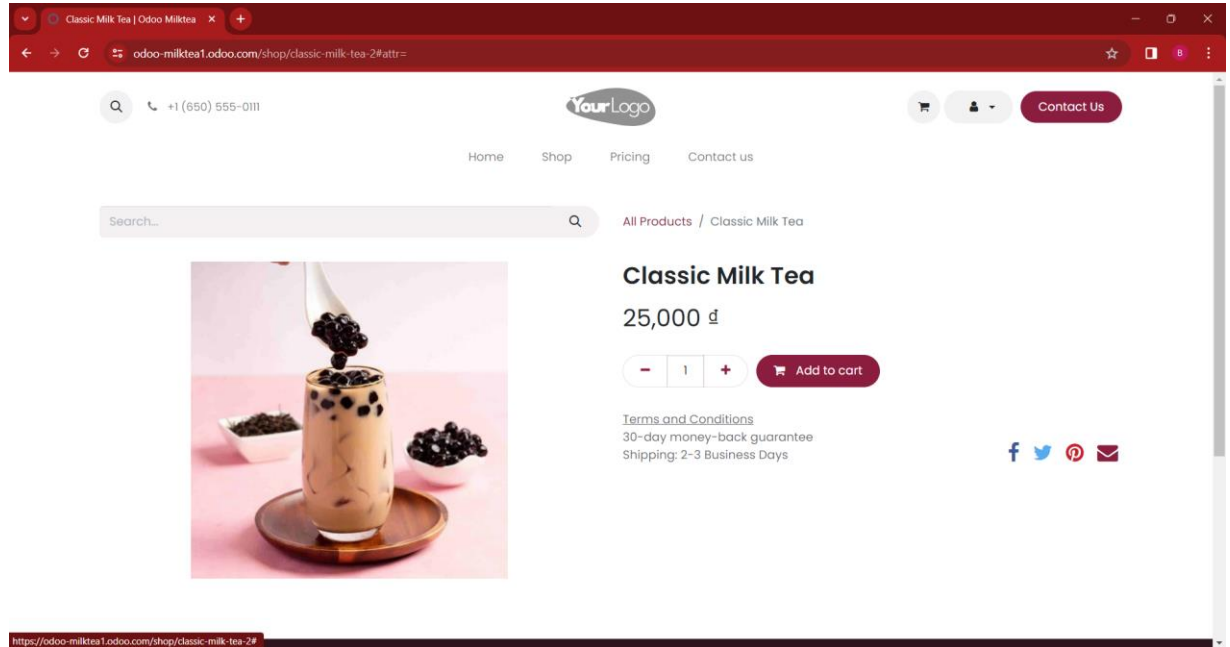
WH/MO/00009

Product: Classic Milk Tea Start Date: 11/25/2023 14:23:58
 Quantity: 1.00 / 1.00 Units To Produce: End: 11/25/2023 14:24:08
 Bill of Material: Classic Milk Tea Responsible: Tan Phat

Components

Product	From	To Consume	Quantity	UoM
Black Tea Bag	WH/Stock	1.00	1.00	Units
Milk	WH/Stock	200.00	200.00	Units
Sugar	WH/Stock	30.00	30.00	Units
Ice Cubes	WH/Stock	5.00	5.00	Units
Boba Pearls	WH/Stock	1.00	1.00	Units

4.5 Buy via Web



4.6 Buy via POS

The first screenshot shows the Odoo POS interface with a shopping cart containing two items: Classic Milk Tea (2.00 Units x 26,250 đ / Units) and Matcha Milk Tea (1.00 Units x 31,500 đ / Units). The total is 84,000 đ. The interface includes a search bar, product images, and a payment section with a 'Payment' button.

The second screenshot shows the 'Payment Successful' screen. It displays the total amount of 84,000 đ and a 'Print Receipt' button. A receipt is shown on the right, detailing the items and their prices. The receipt includes the Odoo logo, contact information, and a list of items: Discount (2.00 Units x 0 đ / Units), Classic Milk Tea (2.00 Units x 26,250 đ / Units), and Matcha Milk Tea (1.00 Units x 31,500 đ / Units), totaling 84,000 đ. A 'New Order' button is at the bottom.

Payment Successful

84,000 đ

Print Receipt

demo@test.com

Your logo

Odoo Milktea
Tel:0375943023
phatben234@gmail.com
Served by Tan Phat
Order: 201

Discount 2.00 Units x 0 đ / Units 0 đ
Discount 2.00 Units x 0 đ / Units 0 đ
Classic Milk Tea 2.00 Units x 26,250 đ / Units 52,500 đ
Matcha Milk Tea 1.00 Units x 31,500 đ / Units 31,500 đ
TOTAL 84,000 đ

> New Order

TASK 5: Describe CRM or SCM process

5.1 CRM Process for a Milk Tea Store:

Customer Data Collection: Information is gathered through loyalty programs, order forms, and feedback surveys. Details such as purchase history, preferences, and contact information are stored in a CRM database.

Customer Segmentation: Customers are categorized based on factors like frequency of visits, average spend, and preference for certain flavors or products.

Personalized Marketing: Using the data, personalized marketing campaigns are created to target different segments with promotions, new flavor launches, and exclusive offers.

Sales Tracking and Analysis: Sales data is analyzed to understand purchasing patterns and the effectiveness of marketing campaigns. This can lead to adjustments in product offerings or promotional strategies.

Customer Service and Feedback: Customer service channels are maintained to handle inquiries and complaints. Feedback is solicited and used to improve products and services.

Customer Retention: Loyalty programs and regular communication are used to encourage repeat business.

5.2 SCM Process for a Milk Tea Store:

Supplier Selection: Identifying and choosing suppliers for ingredients like tea, milk, tapioca pearls, and flavorings.

Inventory Management: Keeping track of stock levels and ordering supplies to avoid shortages or excess.

Order Fulfillment: Ensuring ingredients and supplies are delivered to the store in a timely manner. Quality checks to ensure ingredients meet standards.

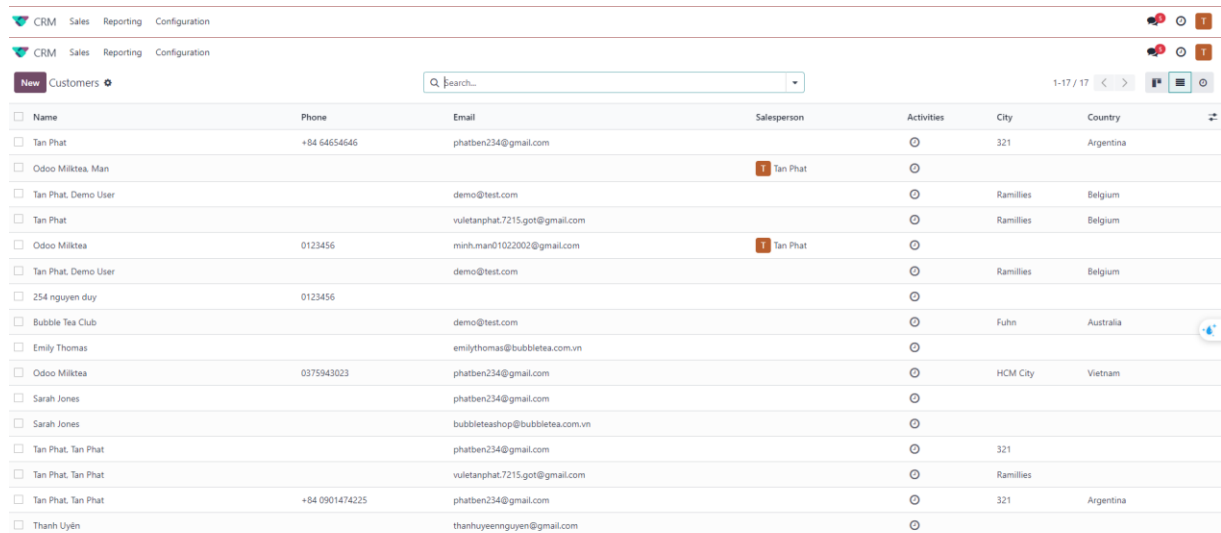
Production Planning: Coordinating the preparation of milk tea to align with customer demand while minimizing waste.

Distribution: If the store operates multiple locations or offers delivery, ensuring the finished product is delivered fresh and quickly.

Returns and Feedback: Handling any issues with supplies, correcting them with suppliers, and using feedback to improve the supply chain.

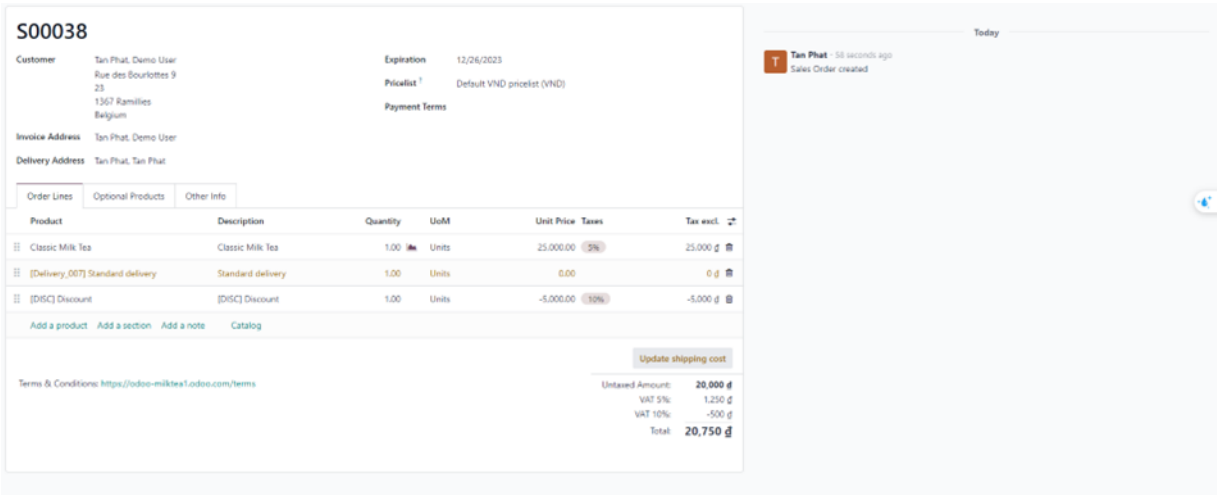
Demo with Odoo:

CRM Process for a Milk Tea Store:

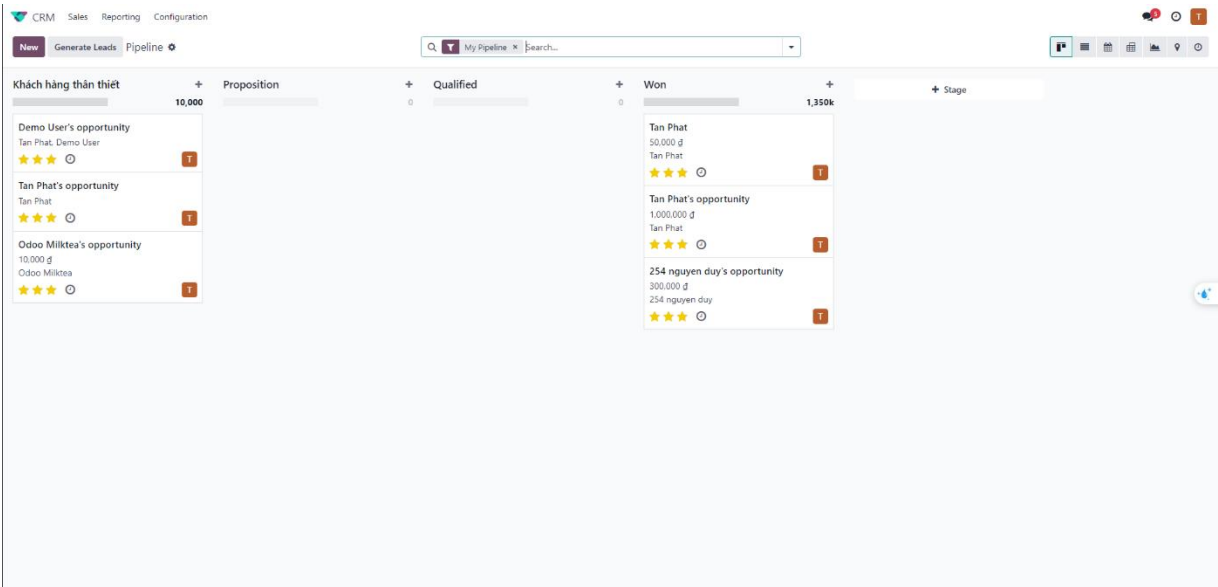


Name	Phone	Email	Salesperson	Activities	City	Country
<input type="checkbox"/> Tan Phat	+84 64654646	phatben234@gmail.com		⊙	321	Argentina
<input type="checkbox"/> Odoo Milktea, Man			1 Tan Phat	⊙		
<input type="checkbox"/> Tan Phat, Demo User		demo@test.com		⊙	Ramillies	Belgium
<input type="checkbox"/> Tan Phat		vuletanphat.7215.got@gmail.com		⊙	Ramillies	Belgium
<input type="checkbox"/> Odoo Milktea	0123456	minh.man01022002@gmail.com	1 Tan Phat	⊙		
<input type="checkbox"/> Tan Phat, Demo User		demo@test.com		⊙	Ramillies	Belgium
<input type="checkbox"/> 254 nguyen duy	0123456			⊙		
<input type="checkbox"/> Bubble Tea Club		demo@test.com		⊙	Fuhn	Australia
<input type="checkbox"/> Emily Thomas		emilythomas@bubbletea.com.vn		⊙		
<input type="checkbox"/> Odoo Milktea	0375943023	phatben234@gmail.com		⊙	HCM City	Vietnam
<input type="checkbox"/> Sarah Jones		phatben234@gmail.com		⊙		
<input type="checkbox"/> Sarah Jones		bubbleteashop@bubbletea.com.vn		⊙		
<input type="checkbox"/> Tan Phat, Tan Phat		phatben234@gmail.com		⊙	321	
<input type="checkbox"/> Tan Phat, Tan Phat		vuletanphat.7215.got@gmail.com		⊙	Ramillies	
<input type="checkbox"/> Tan Phat, Tan Phat	+84 0901474225	phatben234@gmail.com		⊙	321	Argentina
<input type="checkbox"/> Thanh Uyen		thanhuyennguyen@gmail.com		⊙		

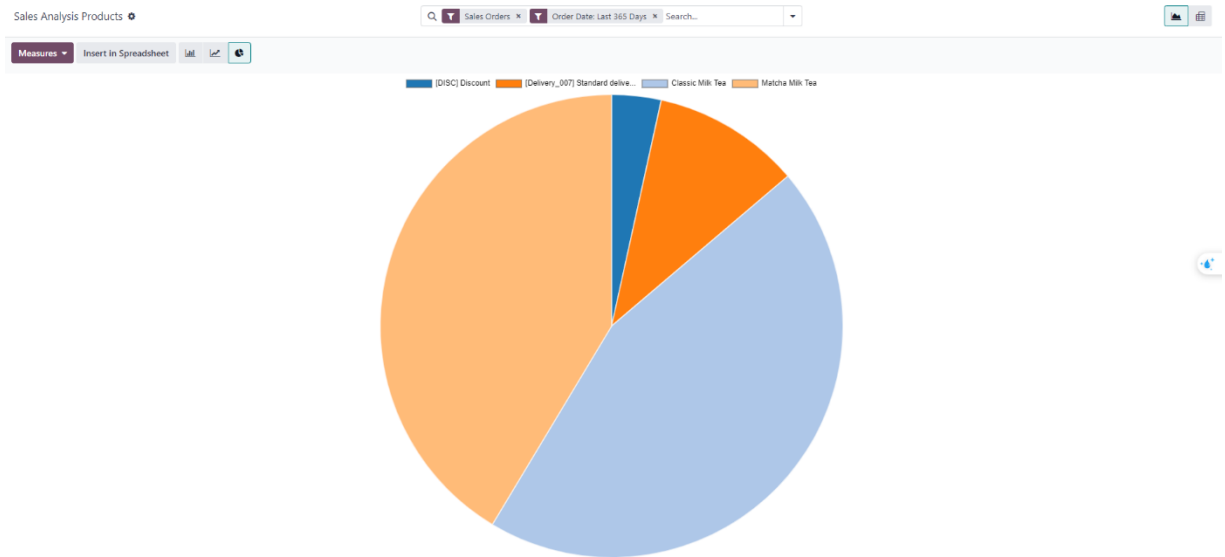
Picture 5.1. List customer



Picture 5.2. Customer Segmentation



Picture 5.3. Customer Segmentation



Picture 5.4. Sales Tracking and Analysis

SCM Process for a Milk Tea Store:

New Purchase Orders

Q Search...

1-14 / 14

	Reference	Confirmation Date	Vendor	Buyer	Activities	Source Document	Total	Billing Status	Expected Arrival
<input type="checkbox"/>	P00012	11/25/2023 23:20:24	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Waiting Bills	11/25/2023 23:20:13
<input type="checkbox"/>	P00019	11/26/2023 16:37:43	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Nothing to Bill	11/26/2023 16:37:20
<input type="checkbox"/>	P00018	11/26/2023 16:36:20	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:35:59
<input type="checkbox"/>	P00008	11/25/2023 11:42:17	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Waiting Bills	11/25/2023 11:41:50
<input type="checkbox"/>	P00020	11/26/2023 16:38:20	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:38:05
<input type="checkbox"/>	P00021	11/26/2023 16:39:19	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Nothing to Bill	11/26/2023 16:39:05
<input type="checkbox"/>	P00013	11/26/2023 16:14:52	Vinamilk - Cúng Con Khôn Lớn	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:12:33
<input type="checkbox"/>	P00010	11/25/2023 23:19:23	Tan Phat	T Tan Phat	○		0 đ	Waiting Bills	11/25/2023 23:19:07
<input type="checkbox"/>	P00001	11/23/2023 17:22:38	Odoo Milktea	T Tan Phat	○		0 đ	Nothing to Bill	11/23/2023 17:20:27
<input type="checkbox"/>	P00003	11/23/2023 17:30:22	Odoo Milktea	T Tan Phat	○		0 đ	Waiting Bills	11/23/2023 17:30:09
<input type="checkbox"/>	P00017	11/26/2023 16:34:45	Odoo Milktea	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:34:05
<input type="checkbox"/>	P00009	11/25/2023 11:47:36	Bubble Tea Club	T Tan Phat	○		0 đ	Waiting Bills	11/25/2023 11:46:11
<input type="checkbox"/>	P00016	11/26/2023 16:34:22	Bubble Tea Club	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:34:06
<input type="checkbox"/>	P00014	11/26/2023 16:31:48	Bubble Tea Club	T Tan Phat	○		0 đ	Waiting Bills	11/26/2023 16:31:27
							0 đ		

Picture 5.5. Supplier Selection

Inventory Overview Operations Products Reporting Configuration

New Stock Search...

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CATEGORY	Product	Unit Cost	Total Value	On Hand	Free to Use	Incoming	Outgoing	Unit	
All	Black Tea Bag	0 đ	0 đ	163.00	156.00	0.00	7.00	Units	History Replenishment Locations Forecast
	Boba Pearls	0 đ	0 đ	337.00	330.00	0.00	7.00	Units	History Replenishment Locations Forecast
	Classic Milk Tea	0 đ	0 đ	179.00	102.00	7.00	97.00	Units	History Replenishment Locations Forecast
	Ice Cubes	0 đ	0 đ	-265.00	-265.00	1,500.00	35.00	Units	History Replenishment Locations Forecast
	Matcha Milk Tea	0 đ	0 đ	29.00	5.00	0.00	36.00	Units	History Replenishment Locations Forecast
	Matcha Powder	0 đ	0 đ	128.00	128.00	0.00	0.00	Units	History Replenishment Locations Forecast
	Milk	0 đ	0 đ	721.00	0.00	800.00	1,400.00	Units	History Replenishment Locations Forecast
	Sugar	0 đ	0 đ	-5,170.00	-5,170.00	0.00	210.00	Units	History Replenishment Locations Forecast
			0 đ	-3,878.00	-4,714.00	2,307.00	1,792.00		

Picture 5.6. Inventory Management

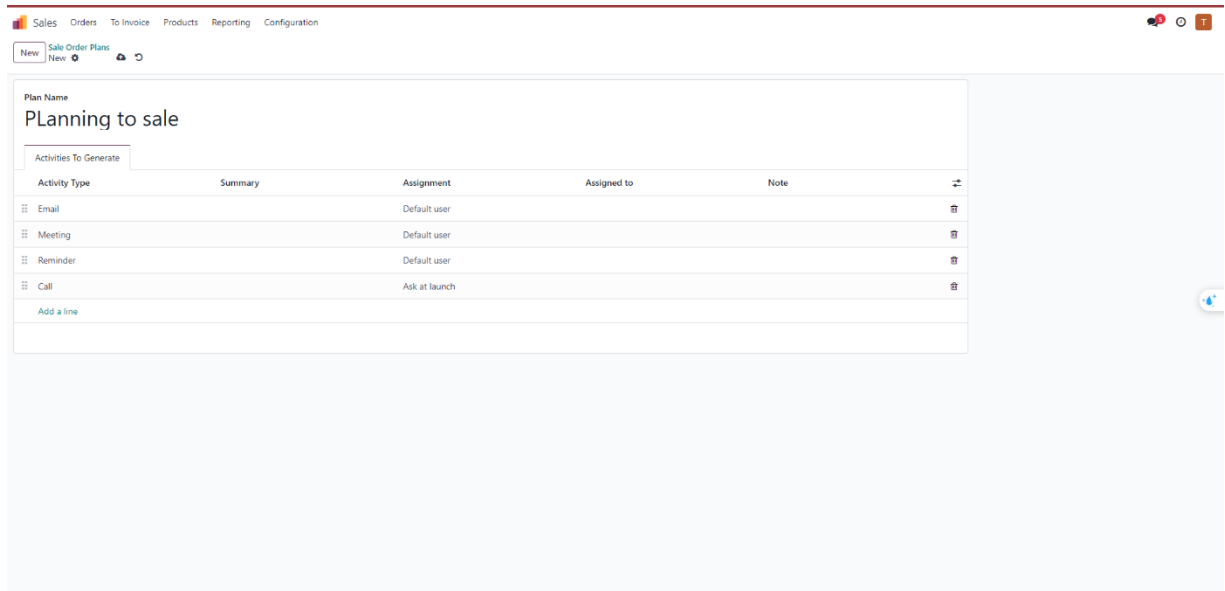
Inventory Overview Operations Products Reporting Configuration

New Inventory Overview Odoo Milktea: Delivery Orders Search...

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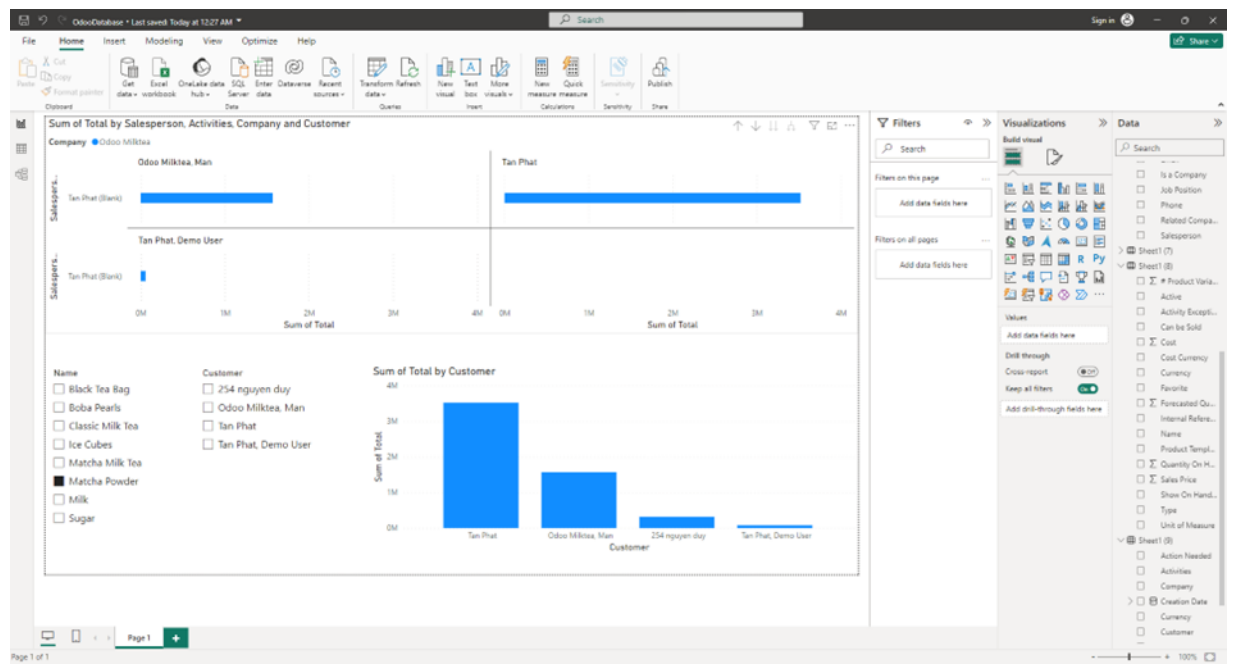
Reference	From	To	Contact	Scheduled Date	Source Document	Status
WH/OUT/00003	WH/Stock	Partners/Customers	Odoo Milktea, Man	2 days ago	S00006	Ready
WH/OUT/00005	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	2 days ago	S00008	Ready
WH/OUT/00002	WH/Stock	Partners/Customers	Odoo Milktea, Man	2 days ago	S00005	Ready
WH/OUT/00006	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00010	Ready
WH/OUT/00007	WH/Stock	Partners/Customers	Odoo Milktea, Man	Yesterday	S00011	Ready
WH/OUT/00009	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00013	Ready
WH/OUT/00011	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00015	Ready
WH/OUT/00012	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00016	Ready
WH/OUT/00013	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00017	Ready
WH/OUT/00014	WH/Stock	Partners/Customers	Odoo Milktea, Man	Yesterday	S00018	Ready
WH/OUT/00020	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00025	Ready
WH/OUT/00021	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00026	Ready
WH/OUT/00022	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00027	Ready
WH/OUT/00023	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00028	Ready
WH/OUT/00024	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Yesterday	S00029	Ready
WH/OUT/00008	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Today	S00012	Ready
WH/OUT/00010	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Today	S00014	Ready
WH/OUT/00015	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Today	S00019	Ready
WH/OUT/00016	WH/Stock	Partners/Customers	Tan Phat, Tan Phat	Today	S00021	Ready

Picture 5.7. Order Fulfillment



Picture 5.8. Production Planning

TASK 6: Apply Power BI connecting to Odoo



TASK 7: Odoo Software Development Architecture

Odoo is an open-source ERP (Enterprise Resource Planning) software suite that provides a comprehensive range of business applications and modules to manage various aspects of a company's operations

Client-Server Architecture:

Odoo follows a client-server architecture, where clients (users and applications) interact with the server to access and manipulate data.

Clients can be web browsers, mobile devices, or other applications that communicate with the Odoo server via HTTP/HTTPS.

Server Layer:

The server layer is the core of the Odoo system, responsible for processing requests and managing data.

It consists of various modules that handle different functionalities, such as sales, inventory, HR management, and more.

The server layer is written primarily in Python, a versatile and widely-used programming language.

Database Management:

Odoo relies on a relational database management system (RDBMS) to store and manage data.

PostgreSQL is the preferred RDBMS for Odoo due to its scalability and performance.

Modules:

Odoo is built around the concept of modules, which are individual units of functionality.

Each module focuses on a specific business process or task, such as accounting, CRM, or inventory management.

Modules can be installed, uninstalled, and customized to adapt to the company's requirements.

Views and Forms:

Odoo uses XML-based views to define how data is presented to users.

Views are used to create user interfaces for various modules.

Forms, lists, and tree views are common types of views used to display and interact with data.

Business Logic:

The business logic of Odoo is defined within its modules using Python code.

Python scripts define how data is processed, rules are applied, and workflows are managed.

Web Interface:

Odoo provides a web-based user interface, allowing users to access the system from anywhere with an internet connection.

The web interface is responsive and can be accessed from various devices, including desktops, tablets, and smartphones.

RESTful API:

Odoo offers a RESTful API that allows external applications to integrate with the system.

This API enables data exchange and interaction with other software and services.

Security:

Odoo incorporates robust security measures, including user authentication, access control, and encryption, to protect sensitive data.

Customization and Extensions:

Companies can extend and customize Odoo's functionality to meet their specific needs.

This can be achieved through the creation of custom modules or by modifying existing ones.

Community and Enterprise Editions:

Odoo is available in both a community edition (open-source) and an enterprise edition (commercial).

The enterprise edition includes additional features and support services.

CONCLUSION

In summary, our implementation of the ERP system in "Odoo Milktea" has showcased the versatility of technology in enhancing business operations. From HR management to inventory control and sales processes, Odoo has proven to be adaptable and efficient.

The integration of data analysis using Power BI has provided valuable insights for strategic decision-making. Our exploration of Odoo's software development and source code customization demonstrates its potential for tailored solutions.

This project underscores the significance of ERP adoption for operational efficiency, customer satisfaction, and business success. It offers valuable lessons for businesses seeking growth and competitiveness through technology.

REFERENCES

1. Odoo Documentation. (n.d.). Retrieved from
<https://www.odoo.com/documentation/>
2. Power BI Documentation. (n.d.). Retrieved from
<https://docs.microsoft.com/en-us/power-bi/>