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**BRD for Cartona Marketplace & Cartona Shop Integration**

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# Document Overview

## **1.1 Purpose of This Document**

This Business Requirements Document (BRD) outlines the business needs, objectives, and high-level requirements for integrating the **Cartona Marketplace System** with the **Odoo System (Cartona Shop System)**. The purpose is to align stakeholders on the scope, goals, and expected business value of this integration initiative.

The integration aims to enable seamless synchronization of data such as orders, inventory, Price Changes, and related business transactions between both systems, ensuring efficiency, accuracy, and scalability.

## 1.2 Target Audience

This document is intended for **business stakeholders, product managers, operations leads, finance teams, and senior leadership** involved in or affected by the integration project. While it provides high-level overviews of functional requirements, it avoids deep technical detail and focuses on business outcomes.

# 2. Executive Summary

## 2.1 Why This Integration Is Needed

Currently, the Cartona Marketplace System and the Odoo System (Cartona Shop) operate as two separate platforms. This disconnect creates manual work, delays in data synchronization, and potential errors in order processing, inventory tracking, and invoicing. As Cartona scales operations, the need for real-time, accurate data flow between both systems becomes critical for operational efficiency and business growth.

## 2.2 Key Business Objectives

This integration project aims to:

* Automate data exchange between Cartona Marketplace and Odoo (e.g., orders, inventory, invoices).
* Reduce manual data entry, saving time and minimizing human error.
* Improve inventory accuracy and real-time stock visibility.
* Enable faster and more accurate invoicing and financial tracking.
* Support business scalability by streamlining internal operations.

## 2.3 Expected Business Benefits

* Operational Efficiency: Less reliance on manual processes means faster turnaround times and better resource utilization.
* Improved Accuracy: Automated syncing ensures consistent and up-to-date data across systems.
* Enhanced Decision-Making: Unified data enables better reporting and insights for sales, inventory, and finance teams.
* Customer Experience: Reduced delays and order errors improve the experience for Retailer and Cartona Shop Users.
* Scalability: Lays the groundwork for scaling operations without proportionally increasing headcount.

# **3. Background and Context**

## **3.1 Overview of Cartona Marketplace System**

Cartona Marketplace is a B2B digital platform connecting retailers with suppliers. It facilitates order placement, product discovery, price comparison, and promotional offers, helping retailers restock efficiently through a mobile-first experience. The platform streamlines the supply chain and supports better communication between market players.

## 3.2 Overview of Odoo (Cartona Shop System)

Odoo is used internally as Cartona's ERP backbone (referred to here as the "Cartona Shop System"). It manages core back-office operations such as inventory, accounting, invoicing, procurement, and reporting. Odoo provides structure and traceability for business transactions and financial data but currently lacks live integration with the Cartona Marketplace frontend.

## 3.3 Current Process and Challenges

Currently, the data exchange between the two systems is manual or semi-automated, leading to the following challenges:

* Manual data entry of orders and invoices across systems, increasing workload and error rates.
* Delayed inventory updates, leading to inaccurate stock visibility.
* Delay in price updates, leading to inaccurate pricing visibility.
* Misalignment in financial records between what is recorded in the marketplace vs. Odoo.
* Limited scalability, as more volume means more manual reconciliation.

## 3.4 Business Impact of Not Integrating

Without proper integration:

* Operations remain dependent on manual intervention, increasing costs and risks.
* Customer satisfaction may drop due to order delays or inconsistencies.
* Real-time decision-making is hindered by data fragmentation.
* Scalability becomes harder, as expansion requires more human resources rather than smarter automation.

# **4. Project Scope**

## 4.1 In-Scope Functionalities

The following areas are included in the scope of this integration project:

* **Order Synchronization**  
  Automatically transfer orders placed in Cartona Marketplace into Odoo as sales orders, including order lines and customer data.
* **Inventory Synchronization**  
  Sync available stock quantities between Odoo and the Marketplace to ensure accurate real-time product availability.
* **Price Synchronization**  
  Any price changes made in Odoo should automatically reflect in the Cartona Marketplace to maintain price consistency across both systems.
* **Fulfillment Status Updates**  
  Update order statuses (e.g., picked, shipped) between systems to ensure visibility for all stakeholders.

## 4.2 Out-of-Scope Items

The following item is excluded from the scope of this integration phase:

* **Product Synchronization**  
  Product creation or synchronization as a separate process is not included. Products will be referenced and handled as part of the invoicing workflow to avoid duplication or misalignment between systems.
* **Retailers Synchronization**

Retailers’ creation or synchronization as a separate process is not included. Retailers will be referenced and handled as part of the financial transactions workflow to avoid duplication or misalignment between systems.

***Note****: Any necessary Retailer data will be pulled through the existing* financial transactions *cycle, ensuring consistency without separate syncing logic.*

# 5. Business Requirements

## 5.1 Core Business Needs

Integration must support the following key business needs:

* Automatically create sales orders in Odoo based on orders placed in Cartona Marketplace.
* Ensure inventory levels in Odoo are reflected in the Marketplace in near real-time.
* Reflect any price changes made in Odoo directly in the Marketplace without manual updates.
* Generate sales invoices in Odoo upon order fulfillment and ensure invoice data is consistent across systems.
* Push order status updates (e.g., picked, shipped) from Odoo to the Marketplace to ensure operational visibility.

## **5.2 Use Cases and Scenarios**

|  |  |  |
| --- | --- | --- |
| # | Use Case | Description |
| 1 | Order Placement | A retailer places an order on Cartona Marketplace → Order appears in Odoo as a sales order. |
| 2 | Price Update | A product price is updated in Odoo → The updated price is automatically pushed to the Marketplace. |
| 3 | Stock Update | Stock is received or adjusted in Odoo → Inventory levels update in the Marketplace to reflect availability. |
| 4 | Invoice Generation | An order is fulfilled in Odoo → A sales invoice is generated and linked to the corresponding marketplace order. |
| 5 | Fulfillment Status | The warehouse team updates status in Odoo (e.g., shipped) → Status is reflected in Cartona Marketplace. |
| 6 | Order Status Changed | Order changed in market place(changed or cancelled) should reflect on odoo |

# 6. Future Process Overview

## 6.1 How the Integration Will Work (High-Level)

The integration between the Cartona Marketplace System and the Odoo System (Cartona Shop) will enable **automated, bi-directional data exchange**. Instead of manual data entry, the two systems will communicate directly to ensure accurate and real-time updates across key business functions.

**Data will flow in the following directions:**

* **From Cartona Marketplace to Odoo**:
  + Orders (Created, Updated, Cancelled)
  + Order details (items, quantities, customer info)
  + Customer reference
* **From Odoo to Cartona Marketplace**:
  + Stock availability
  + Product pricing
  + Order status updates

## 6.2 Business Process Flow (Before vs After)

| **Step** | **Current State (Before Integration)** | **Future State (After Integration)** |
| --- | --- | --- |
| Order Processing | Orders are manually re-entered into Odoo | Orders sync automatically in real-time |
| Stock Management | Inventory updated manually between systems | Inventory syncs automatically from Odoo |
| Price Changes | Prices updated separately in both systems | Prices updated once in Odoo and reflected in Marketplace |
| Status Tracking | Manual updates by operations | Status updates flow automatically between systems |

## 6.3 Example Journeys

***Example 1: Order Sync***

A retailer places an order via the Cartona app → Order is instantly created in Odoo → Stock is reserved → Warehouse fulfills the order → Order status is updated.

***Example 2: Price Update***

The product price is updated in Odoo (e.g., EGP 95 to EGP 90) → the new price is displayed on the Cartona Marketplace, ensuring all retailers see accurate pricing.

***Example 3: Inventory Adjustment***

Warehouse receives a new shipment of a product → Stock is updated in Odoo → Cartona Marketplace reflects the new available quantity in real time.

# 7. Data and Reporting Needs

## 7.1 Key Data to Be Shared Between Systems

The integration will support automated exchange of the following essential data sets:

| **Data Type** | **Direction** | **Description** |
| --- | --- | --- |
| **Sales Orders** | Cartona → Odoo | Orders placed by retailers in Cartona will be created in Odoo as sales orders. |
| **Product Prices** | Odoo → Cartona | Any change in standard selling prices in Odoo will update product prices in Cartona. |
| **Inventory Levels** | Odoo → Cartona | Real-time stock levels and availability for products will sync from Odoo to the Marketplace. |
| **Order Status Updates** | Cartona → Odoo | Update or cancel order will reflect on Odoo Sales order |
| **Order Status Updates** | Odoo → Cartona | Fulfillment statuses (picked, packed, shipped, etc.) will sync back to Cartona to inform retailers. |