



Savoir-faire  
**LINUX**®



odoo

**ICTC Training program**

# Versioning

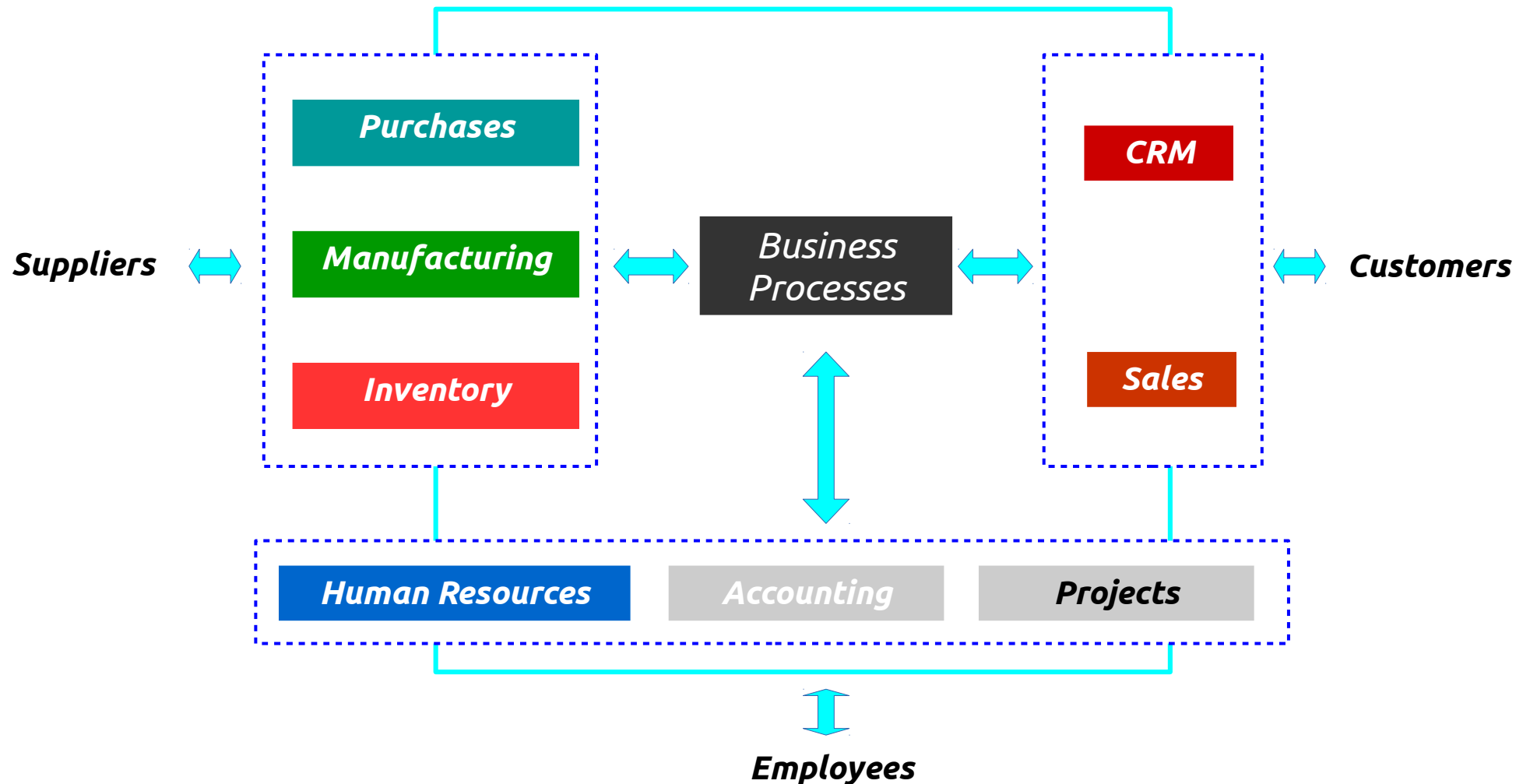
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Version	Date de version	Auteur / Contributeurs	Nature des modifications
3.2	2017-06-08	Carol Andrea Guerrero Mickaël Brard	Initial diffusion

# Summing-up

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## Integrated Business Process with Odoo



# Summing-up / ERP Modules

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## CRM

- Sales team Management
- Customer Management
- Lead Management
- Opportunities Management
- Help Desk & Support



## Sales

- Quotation Management
- Order Management
- Invoice Management
- Products & Pricing Management



## Purchases

- Purchasing Management
- Replenishment
- Supplier Management
- Products / Services Management



## Inventory

- Inventory Management
- Logistics – In & Out Bound
- Stock Allocation
- Warehouse & Locations Management



## Manufacturing

- Production Order
- Bill of Material
- Routing
- Quality & Maintenance
- Lean Manufacturing



## Human Resources

- Recruitment
- Employees
- Performance Management
- Compensation
- Training & Development
- Attendance & Leaves
- Expenses



The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The overall color is a dark charcoal or black, with some lighter grey tones highlighting the texture of the bricks and mortar.

odoo

*Project Management*

# Project Management

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## Project Management Strategies

### 1. Identify value

- Management Improvement
- Increase Competitive Advantage
- New Product / Service Development
- Restructuring

### 2. Definition & Planning

- Scope
- Quality
- Shedule & Deadlines
- Budget
- Ressources
- Risk
- Methodology & Deliverables

### 3. Execution & Control

- Cost
- Time
- Quality
- Communications
- Procurement
- Risk
- Human Resources

### 4. Close-Out & Support

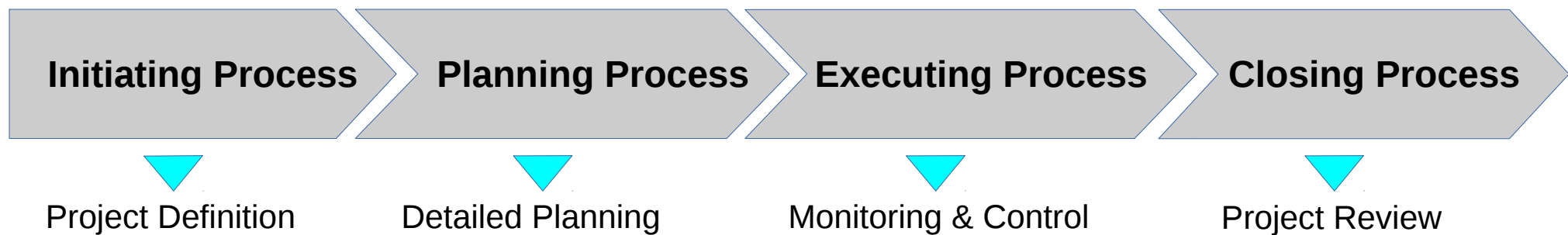
- Project Completion
- Reporting Results & deliverables
- Training
- Change Management
- Continuous Improvement

# Project Lifecycle - Overview

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« The life cycle is the only thing that uniquely distinguishes projects from non-projects »

Patel & Morris (The Role of the Project Life Cycle in Project Management : A literature review by R. Max Wideman)





The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The overall color is a dark charcoal or black, with some lighter grey tones highlighting the texture of the bricks and mortar.

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*Set up a new project*



## Exercise : Creating a new project

Canadian Colors wants to potentiate its virtual distribution channel to increase sales by 40%. For this, the Marketing Director as the Project Manager will be in charge of making the redesign of the website.

The project will be developed under the following guideline :

Execution Time	3 months
Assigned Budget	\$ 17.000
Assigned Staff	(1) Project Manager (1) Graphic Designer (1) Web Strategist (1) Web Developer

Project Plan	Activity	Initially Planned Hours	Estimated execution time		
			January	February	March
	Benchmarking & Analysis of the competition	80	X		
	Auditing of the current website	80	X		
	Design of web marketing strategies	80	X		
	Architecture of the new website	80	X	X	
	Mockups	80		X	
	Web development and integration	120		X	
	User Experience Test	80			X
	Launch	40			X

## Exercise : Creating a new project

### TO DO :

- Create new stages : TO DO, IN PROGRESS, and DONE
- According to the project plan, to create the tasks for this project
- Fill out each task with a little description, planned hours and estimated execution time

*Note : the system assigns you as the person responsible for executing the tasks by default. Do not change this parameter.*

# odoo Projects – New Project

---

The image shows the Odoo Projects interface. At the top, there is a purple header bar with the 'Project' title and navigation links: Dashboard, Search, Reports, and Configuration. Below this, a 'Projects' section contains a green 'CREATE' button, which is highlighted with a red rectangle. A large red arrow points from this button down to a 'Create a Project' modal window. The modal window has a title bar with a close button (X). Inside, there are two text input fields: 'Project Name' with the value 'Website redesign' and 'Choose a Project Email' with the value 'edu-crashtest1.odoo.com'. To the right of these fields are three checkboxes: 'Use Tasks' (checked), 'Allow timesheets' (checked), and 'Use Issues' (checked). At the bottom of the modal, there are two buttons: 'CREATE' (green) and 'DISCARD' (blue).

Project Dashboard Search Reports Configuration

Projects

CREATE

Click to create a new project.  
Or [activate a sample project](#) to play with.

Create a Project

Project Name Website redesign

Choose a Project Email edu-crashtest1.odoo.com

Use Tasks ☒

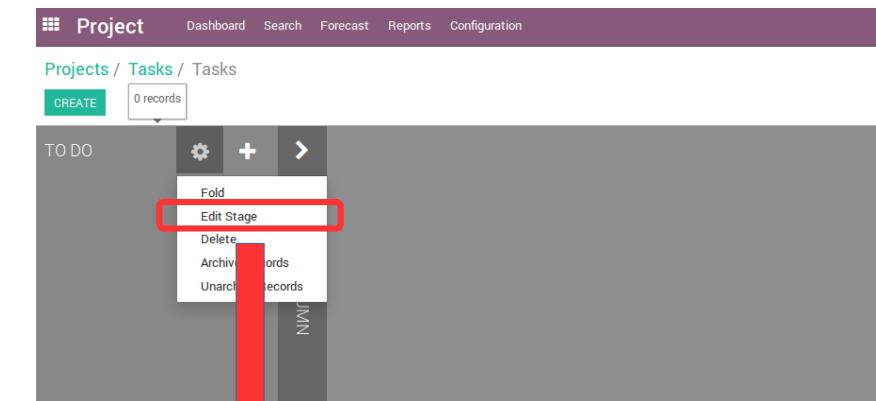
Allow timesheets ☒

Use Issues ☒

CREATE DISCARD

# odoo Projects – Project Stages

## 1 Creating new stages



Edit Column

Stage Name  ☐ Folded in Tasks Pipeline

Stage Description and Tooltips

At each stage employees can block or make task/issue ready for next stage. You can define here labels that will be displayed for the state instead of the default labels.

<input type="radio"/>	In Progress	<input checked="" type="checkbox"/>
<input type="radio"/>	Blocked	<input checked="" type="checkbox"/>
<input type="radio"/>	Ready for next stage	<input checked="" type="checkbox"/>

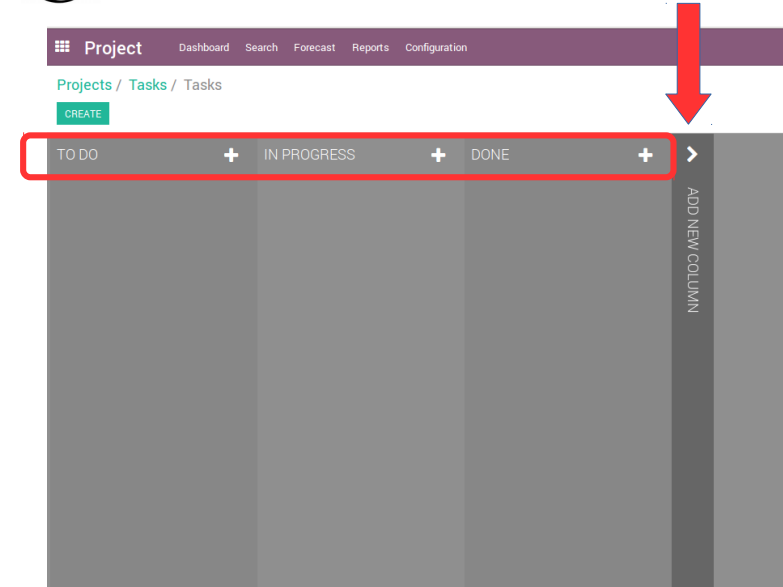
You can also give a tooltip about the use of the stars available in the kanban and form views.

★ Key task ☒

You can also add a description to help your coworkers understand the meaning and purpose of the stage.

Only place here tasks that have been confirmed by the project manager.

## 2 Add & rearrange stages





# odoo Projects – Project Tasks

Project Dashboard Search Forecast Reports Configuration

Projects / Tasks / New

SAVE DISCARD

Active

## ★ Benchmarking & Analysis of the competition

Project	Website redesign	Deadline	01/31/2017
Assigned to	Judy Garza	Tags	
Initially Planned Hours	80:00	Working Time Recorded	0%

DESCRIPTION TIMESHEETS EXTRA INFO

**B I U S** [List Icons] [Undo] [Redo] [Link] [Image]

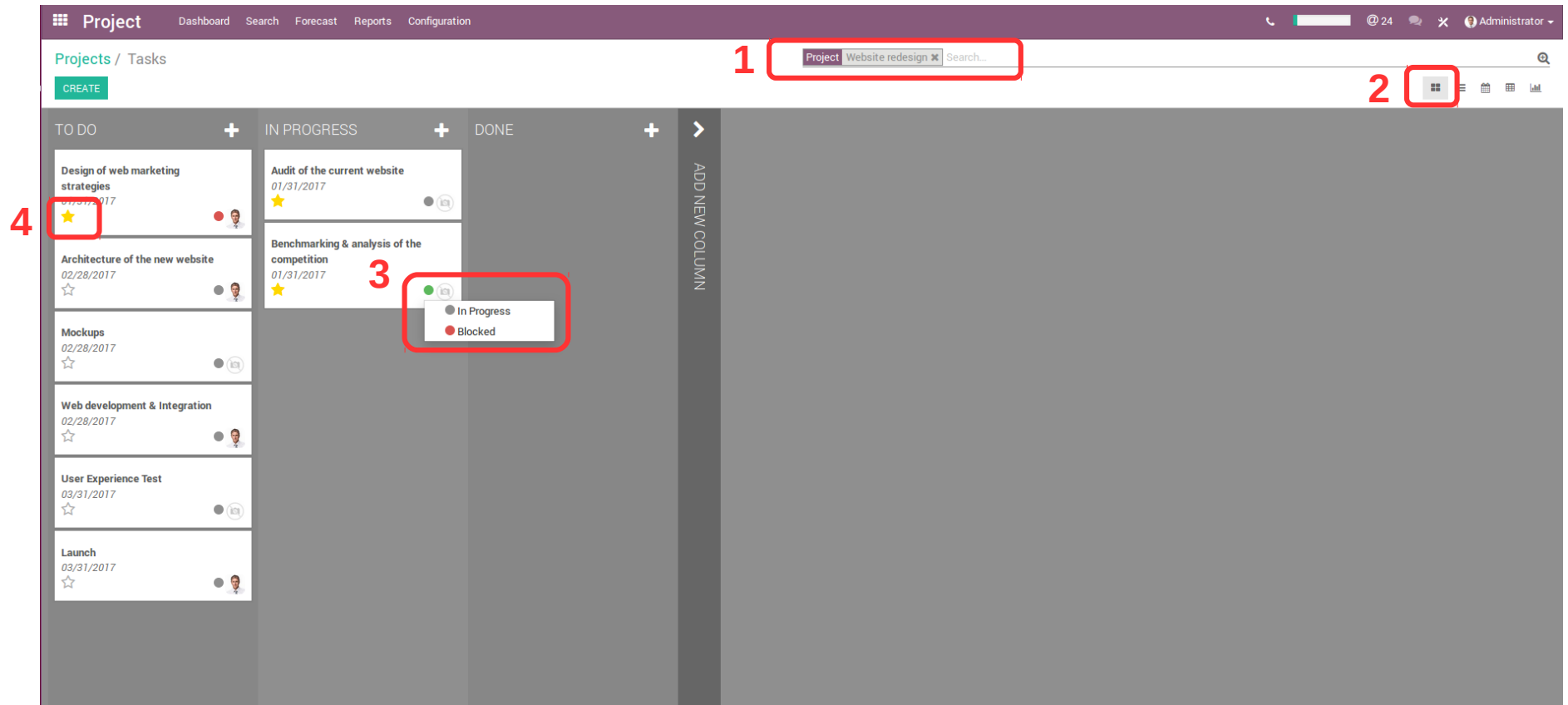
1 Benchmarking as a way to compare key metrics to other businesses in the industry.

2 Analysis of competitors

3 - Analysis and audit of the websites of competition

4

# odoo Projects – Overview of activities



1. Internal search engine
2. Kanban View
3. Custom states
4. Sort tasks by priority

The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The lighting is slightly uneven, giving the wall a three-dimensional appearance.

odoo

*Record time spent*

# **Projects – Recording timesheets**

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Odoo allows you to record the time spent per employee and per project, for simple reports as well as for direct invoicing to the customer.

In Odoo you have two options to record the time spent of employees :

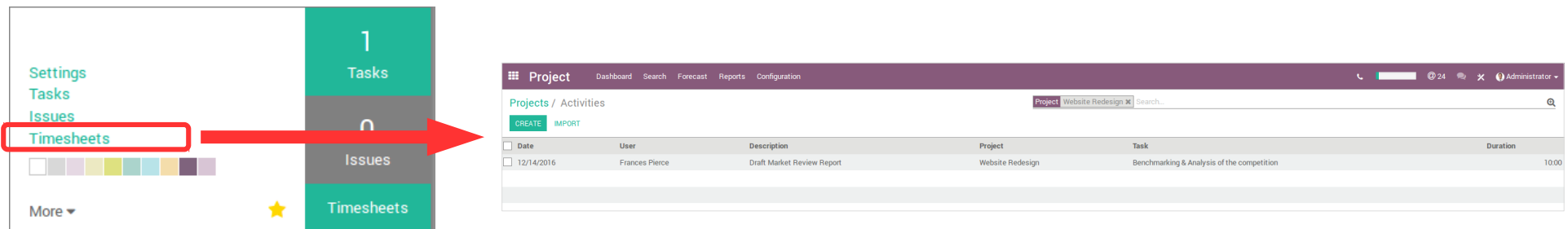
- From the projects application
- From the timesheets application



# odoo Projects – Recording timesheets

→ Settings ► Timesheets ► Activate timesheets on issues

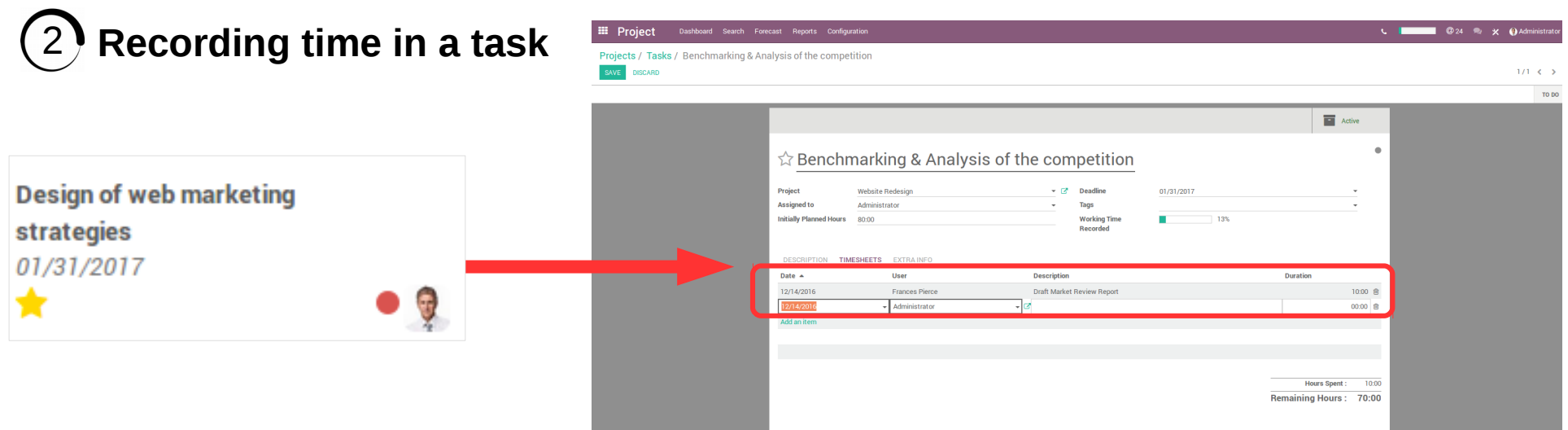
## ① Recording time in a project



The screenshot shows the Odoo Projects interface. On the left, a navigation menu has 'Timesheets' highlighted with a red box. A red arrow points from this menu item to a table of activities. The table has columns: Date, User, Description, Project, Task, and Duration. The first row shows a task 'Draft Market Review Report' under the project 'Website Redesign'.

Date	User	Description	Project	Task	Duration
12/14/2016	Frances Pierce	Draft Market Review Report	Website Redesign	Benchmarking & Analysis of the competition	10:00

## ② Recording time in a task



The screenshot shows the 'Benchmarks & Analysis of the competition' task page. A red arrow points from a task card on the left to the 'TIMESHEETS' tab. The timesheet table has columns: Date, User, Description, and Duration. The first row shows a task 'Draft Market Review Report' under the project 'Website Redesign'.

Date	User	Description	Duration
12/14/2016	Frances Pierce	Draft Market Review Report	10:00
12/14/2016	Administrator		00:00

Hours Spent: 10:00  
Remaining Hours: 70:00

# odoo Projects – Recording timesheets



## Timesheets

[illegible]

Add a Line

Project

Website redesign

Date

04/04/2017

Task

Benchmarking & Analysis of the competition

Time Spent

10

Analysis and evaluation of the competition

SAVE

DISCARD

# odoo Projects – Working Time Progress

Project Dashboard Search Reports Configuration

Projects / Tasks / Benchmarking & Analysis of the competition

EDIT CREATE Attachment(s) Action 1 / 8 < >

TO DO IN PROGRESS DONE

★ Benchmarking & Analysis of the competition

Project Website redesign  
Assigned to ictcfomation@savoirfairelinux.com  
Initially Planned Hours 80:00

Deadline 06/23/2017

Tags

Working Time Recorded 16%

DESCRIPTION TIMESHEETS EXTRA INFO

Date	User	Description	Duration
04/04/2017	ictcfomation@savoirfairelinux.com	Selection of the competition	03:00
04/04/2017	ictcfomation@savoirfairelinux.com	Analysis and evaluation of the competition	10:00

Hours Spent : 13:00  
Remaining Hours : 67:00

Projects / Tasks

CREATE IMPORT

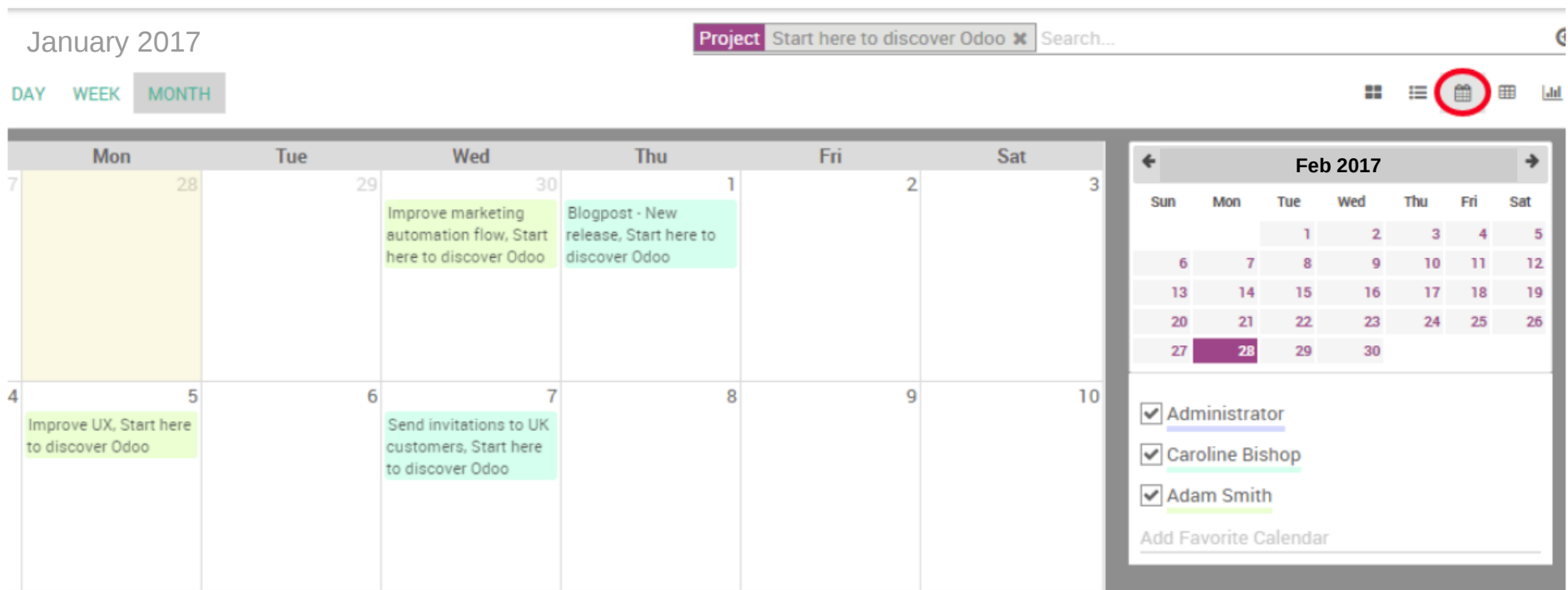
Project Website redesign Search...

1-8 / 8 < > [Menu] [Calendar] [Gantt] [List]

<input type="checkbox"/> Task Title	Project	Assigned to	Initially Planned Hours	Remaining Hours	Stage	Working Time Recorded
▼ TO DO (8)			80.00	67:00		
<input type="checkbox"/> Benchmarking & Analysis of the competition	Website redesign	ictcfomation@savoirfairelinux.com		80.00	67:00 TO DO	<div></div>
<input type="checkbox"/> Auditing of the current website	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> Design of web marketing strategies	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> Architecture of the new website	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> Mockups	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> Web development and integration	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> User Experience Test	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
<input type="checkbox"/> Launch	Website redesign	ictcfomation@savoirfairelinux.com		0.00	00:00 TO DO	<div></div>
IN PROGRESS (0)			0.00	00:00		<div></div>
DONE (0)			0.00	00:00		<div></div>
			67:00			

# odoo Projects – Deadlines with the Calendar view

If you add a deadline in tasks, they will appear in the calendar view. As a manager, this view enables you to keep an eye on all deadlines in a single window.



- All the tasks are tagged with a color corresponding to the employee assigned to them.
- Filter deadlines by employees by ticking the related boxes on the right of the calendar view



## Exercise : Record time spent

### TO DO :

- As Project Manager, take some tasks and record time spent on each one
- Check the overall progress of the project according to the records that you has created

*Note : the system assigns you as the person responsible for executing the tasks by default. Do not change this parameter.*

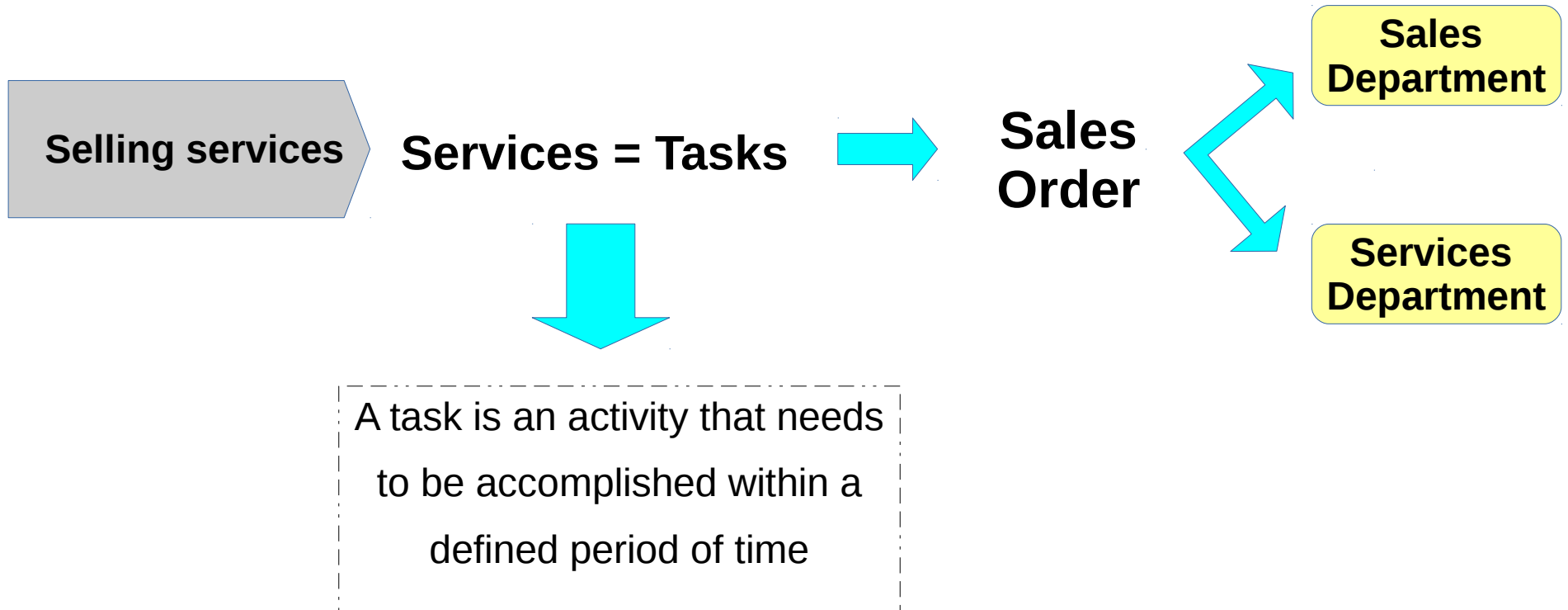
The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The overall color is a dark charcoal or black, with some lighter grey tones in the mortar joints.

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*Project Management & Sales*

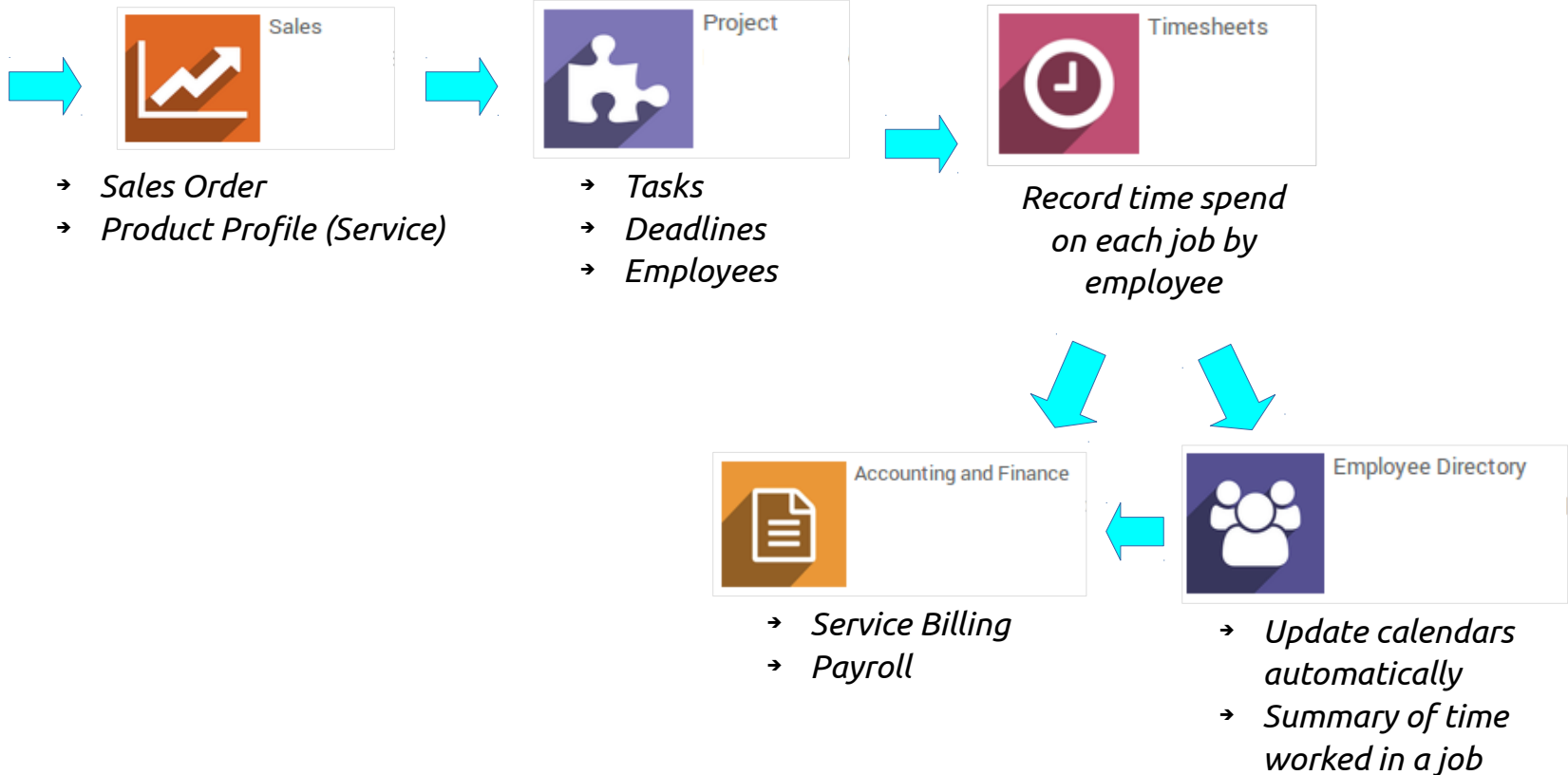
# Create tasks from sales order

---



# odoo Integration with other Odoo Apps

**Selling a service**





## Exercise : Record time spent

Canadian Colors Inc. offers custom decoration and renovation service to home and industrial improvement projects. This service is offered to customers in stores.

A customer bought an Epoxy application service and floor renovation for your factory. This service is sold in pack of 36 hours at \$9.000. The price is fixed and charged initially. But the company wants to keep track of the delivery of this service per hour worked.

On the sale order, the service will trigger the creation of a task from which contractors will record timesheets and, if needed, reinvoice the customer according to the overtime and materials spent on the project.

# Exercise : Record time spent

## TO DO :

- Create and set up the service in order to generate a task every time it will be sold. In the Sales module, create a new product with the following setup :
  - **Name** : Renovation Service
  - **Product Type** : Service
  - **Unit of Measure** : Hours
  - **Internal category** : All / Professional services
  - **Invoicing policy** : You can set up invoice policy either on ordered quantity or on delivered quantity. You can easily follow the amount of hours that were delivered and/or invoiced to your client.
  - **Track Service** : Create a task and track hours, as your product is a service invoiceable by hours you have to set the units of measures of the product to hours as well.
  - **Customer Lead Time** : 3 days (36 hours)

## Exercise : Record time spent

### TO DO :

- Once the product is set up, create a quotation or a sale order with the related product. Once the quotation is confirmed and transformed into a sale order, the task will be created. In the Sales module, create a new sales order with the following setup :
  - **Customer** : Home Decor – Invent the additional information of this client.
  - **Payment terms** : Immediate Payment
- A new task will appear in the new sales order and the Project module
- Switch from role to contractor, complete the task for this project
- Invoice the service to the customer

# odoo Create and set up a product (service)

Active

Unpublished On Website

0 Attachments

0 Purchases

0 Sales

0 File

Product Name

Renovation Service

☒ Can be Sold  
☐ Can be Purchased  
☐ Can be Expensed

GENERAL INFORMATIONINVENTORYSALESVARIANTSINVOICINGNOTES

Product TypeService

Internal Reference

Barcode

Sale Price12000

Cost0.00

Companyedu-crashtest1

Unit of MeasureHour(s)

Purchase Unit of MeasureHour(s)

Control Purchase Bills  
☐ On ordered quantities  
☒ On received quantities

Invoicing Policy

Invoicing Policy

Track Service

Project

☐ Ordered quantities  
☒ Delivered quantities  
☐ Manually set quantities on order  
☐ Timesheets on project  
☒ Create a task and track hours

Link this task to an existing project or create a new one. Otherwise, you can leave it blank, Odoo will then create a project per so.

# odoo Create the Sales Order

**Sales** Dashboard Sales Invoicing Reports Configuration

Sales Orders / SO004

EDIT CREATE

Print Attachment(s) Action

2 / 2 < >

SEND BY EMAIL PRINT **CONFIRM SALE** CANCEL

**SO004**

Customer: Home Decor

Order Date: 04/04/2017 18:49:52  
Expiration Date: 04/20/2017  
Pricelist: Public Pricelist (CAD)  
Payment Terms: Immediate Payment

ORDER LINES		OTHER INFORMATION								
Product	Description	Ordered Qty	Delivered	Invoiced	Unit of Measure	Analytic Tags	Unit Price	Taxes	Discount (%)	Subtotal
Renovation Service	Renovation Service	36.000	0.000	0.000	Hour(s)		250.00	GST for sales - 5%	0.00	9,000.00

Untaxed Amount : 9,000.00\$  
Taxes : 450.00\$  
Total : 9,450.00\$

1

**SO004**

Customer: Home Decor

Confirmation Date: 04/04/2017 18:58:58  
Pricelist: Public Pricelist (CAD)  
Payment Terms: Immediate Payment

ORDER LINES		OTHER INFORMATION								
Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Unit Price	Taxes	Discount (%)	Subtotal		
Renovation Service	Renovation Service	36.000	Hour(s)		250.00	GST for sales - 5%	0.00	9,000.00		

Project 1 Task

# odoo Access the task generated from the sale order

The screenshot displays the Odoo Project dashboard. At the top, a purple navigation bar contains the 'Project' title and links to 'Dashboard', 'Search', 'Reports', and 'Configuration'. Below this, a 'Projects' section features a 'CREATE' button and a search bar. The main content area shows two project cards. The first card, for project 'SO004' (highlighted with a red box), lists '1 Task' (circled in red), '0 Issues', and 'Timesheets'. The second card, for 'Website redesign', lists '8 Tasks', '0 Issues', and 'Timesheets'. Each card includes a 'More' dropdown and a star icon.

Project Name	Tasks	Issues	Timesheets
SO004	1	0	Timesheets
Website redesign	8	0	Timesheets

- On the task itself, you will now be able to record timesheets and to invoice customers based on invoicing policy.



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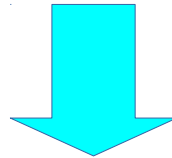
# odoo

## *Issue Tracking*

# Projects to handle claims/issues

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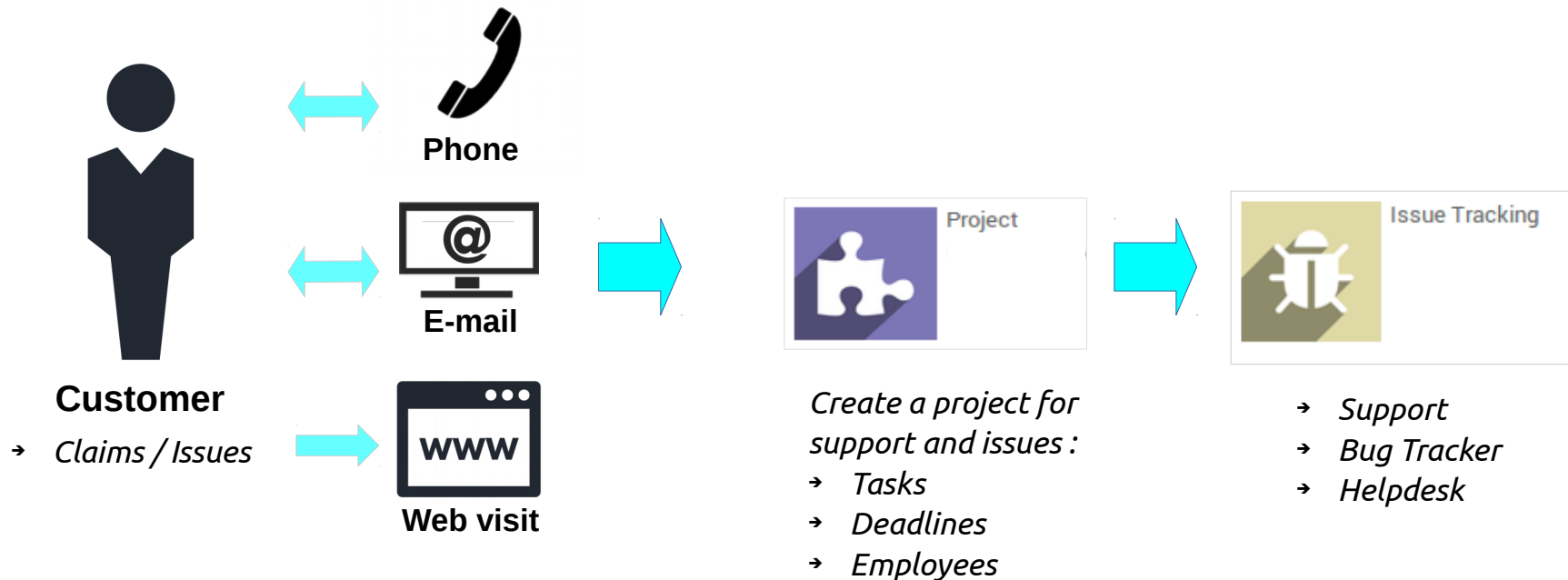
Odoo offers the opportunity to create dedicated support projects which automatically generate tasks upon receiving an customer support email.



- The issue can be assigned directly to an employee
  - The issue can be treated and closed quickly

# odoo Integration with other Odoo Apps

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## Exercise : Creating a support project

Canadian Colors recently implemented a new ERP system. In order to ensure the smooth operation of applications, the company created a new project called "Internal Support" to give an immediate response or technical support of the system.

A work team will provide technical service to each user who records issues manually or via email.

### **TO DO**

- *Let's start by simply creating a support project. Create a new project « Internal Support »*
- *Tick the issues box and rename the field as « Bugs ». Also, set up the email « support » to generate issues from this email.*
- *Activate and give visibility to employees on invitation only to follow their claims/issues*
- *Set up to notify employees when an issue will be created and assigned an employee*
- *Set up the workflow : Undefined, Assigned, Analysis, Customer Feedback, close, and cancelled.*
- *Create some support issues manually in this project (e.g. Error during data migration, Cannot open the CRM module, Customized field for Healthcare, etc.)*

# odoo Creating a support project

Create a Project

Project Name

Internal Support

Choose a Project Email

support

@

edu-crashtest1.odoo.com

Use Tasks

☒

Allow timesheets

☒

Use Issues

☒

CREATE

DISCARD

Project

Dashboard Search Reports Configuration

Projects

CREATE

Internal Support

support@edu-crashtest1.odoo.com

0

Tasks

0

Issues

Timesheets

More

★

Renovation Service

so004-renovation-service@edu-cras...

0

Tasks

0

Issues

Timesheets

More

★

SO004

so004@edu-crashtest1.odoo.com

1

Tasks

0

Issues

Timesheets

More

★

Website redesign

website-redesign@edu-crashtest1.o...

8

Tasks

0

Issues

Timesheets

More

★

Settings

# odoo Creating a support project

0 Documents

0 Tasks

0 Bugs

Timesheets

Active

## Internal Support

☒ Tasks as Tasks

☒ Issues as Bugs

☒ Allow timesheets

SETTINGS EMAILS

Project Manager ictcformation@savoirfairelinux.com

Privacy

☒ On invitation only

☐ Visible by all employees

☐ Visible by following customers

Customer

0 Documents

0 Tasks

0 Bugs

Timesheets

Active

## Internal Support

☒ Tasks as Tasks

☒ Issues as Bugs

☒ Allow timesheets

SETTINGS EMAILS

Email Alias support@edu-crashtest1.odoo.com

Incoming Emails create Issues

Accept Emails From Everyone



# odoo Issues assigned to employees

Project Dashboard Search Reports Configuration ictformation@savoirfairelinux.com

Projects / Internal Support

SAVE DISCARD 1 / 4 < >

0 Documents 0 Tasks 0 Bugs Timesheets Active

## Internal Support

☒ Tasks as Tasks  
☒ Issues as Bugs  
☒ Allow timesheets

SETTINGS EMAILS

Project Manager ictformation@savoirfairelinux.com

Privacy ☒ On invitation only  
☐ Visible by all employees  
☐ Visible by following customers

Customer

Follow this project to automatically track the events associated to tasks and issues of this project.

Invite Follower

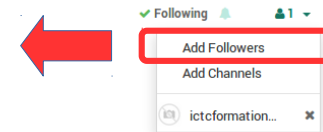
Recipients Paul Tremblay x Add contacts to notify...

Send Email ☒

Message


Dear support team,  
This project has been created to handle all claims and issues.  
When an issue has been assigned to you, please take it into account and try to close it within 2 open days.  
Thanks

ADD FOLLOWERS CANCEL




**Adding a follower means that this person will be notified of any changes that might happen in the task.**

# odoo Set up the workflow


 **Set up the workflow**

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 **Project**

Dashboard Search Reports Configuration

Projects / Tasks

Project Internal Support  Search...

CREATE

Undefined	+	Assigned	+	Analysis	+	Customer Feedback	+	>
								ADD NEW COLUMN

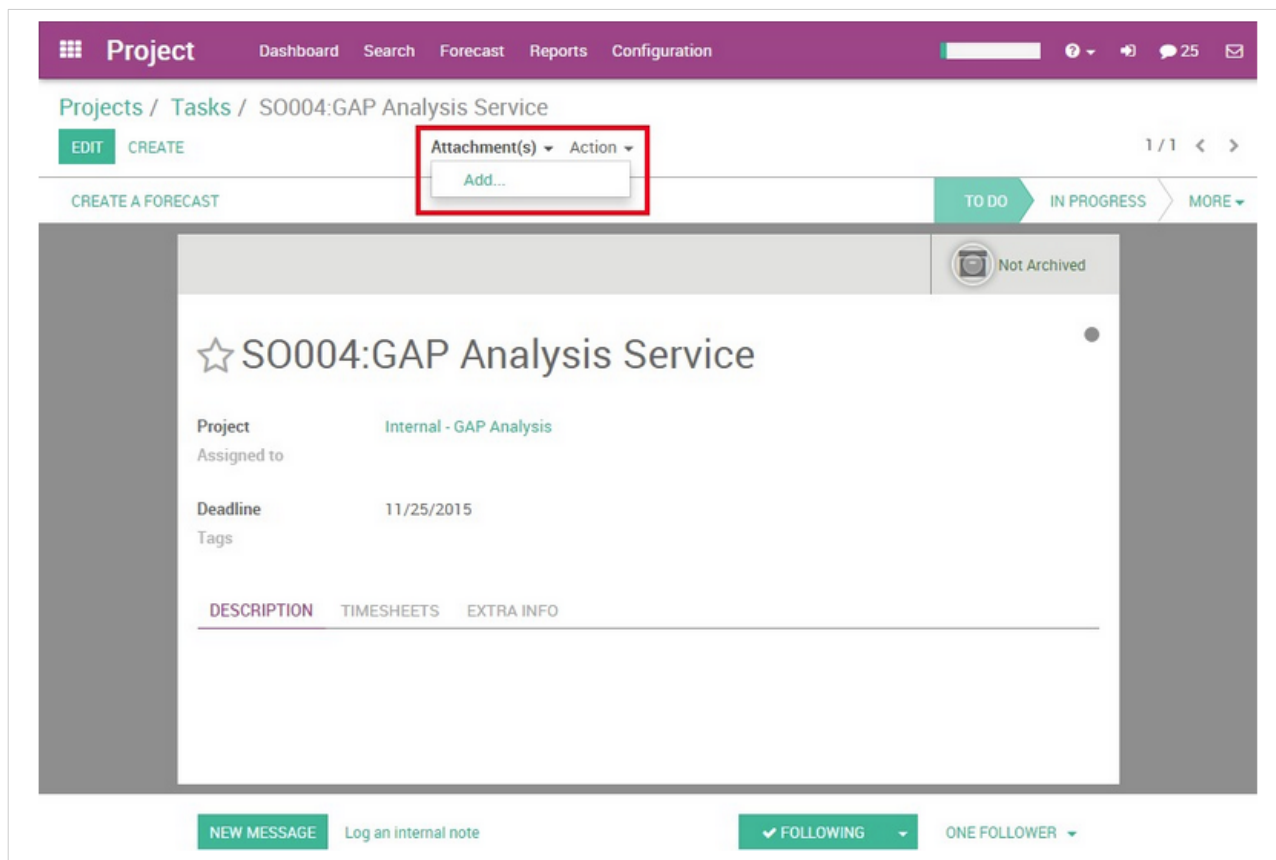
odoo

*Document Management in tasks*

# odoo Document Management in Tasks

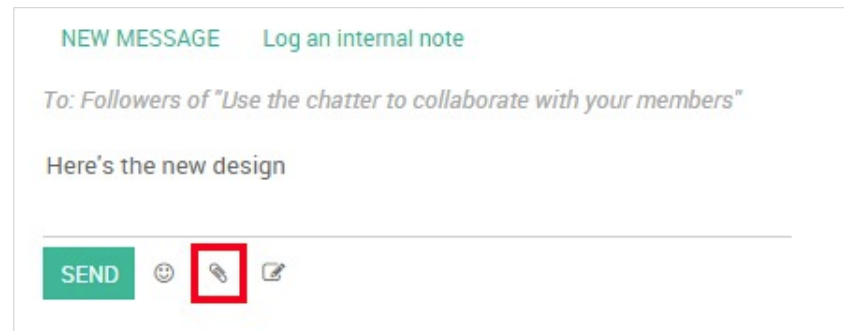
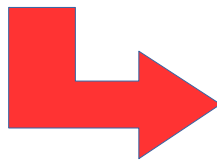
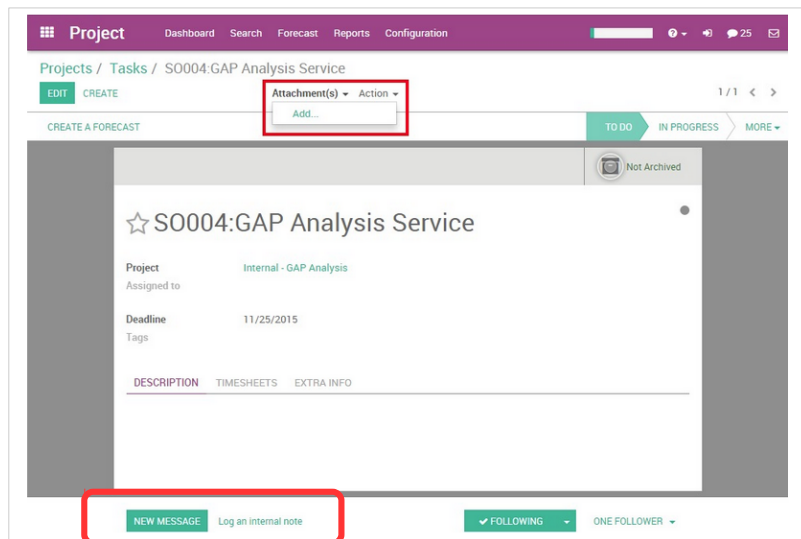
You can manage documents related to tasks whether they are plans, pictures of the formatting, etc. There are two ways to add a document to a task :

1. By clicking on the Attachment tab on the top of the form.



# odoo Document Management in Tasks

2. Through the Chatter, you can log a note/send a message and attach a file to it. Or if someone sends an email with an attachment, the document will be automatically saved in the task.



# Questions?





# Contributions

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This document has been authored and distributed by the functional team of Odoo, Savoir-faire Linux :

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- Guillaume Lot

You can download this training document, use and modify it (within disposals and limits of the applicable licence CC-BY-NC-SA), at the following url :

<https://github.com/savoirfairelinux/training-odoo>



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*IT Management Solutions*