Savoir-faire LINUX®

odoo

ICTC Training program

Versioning

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

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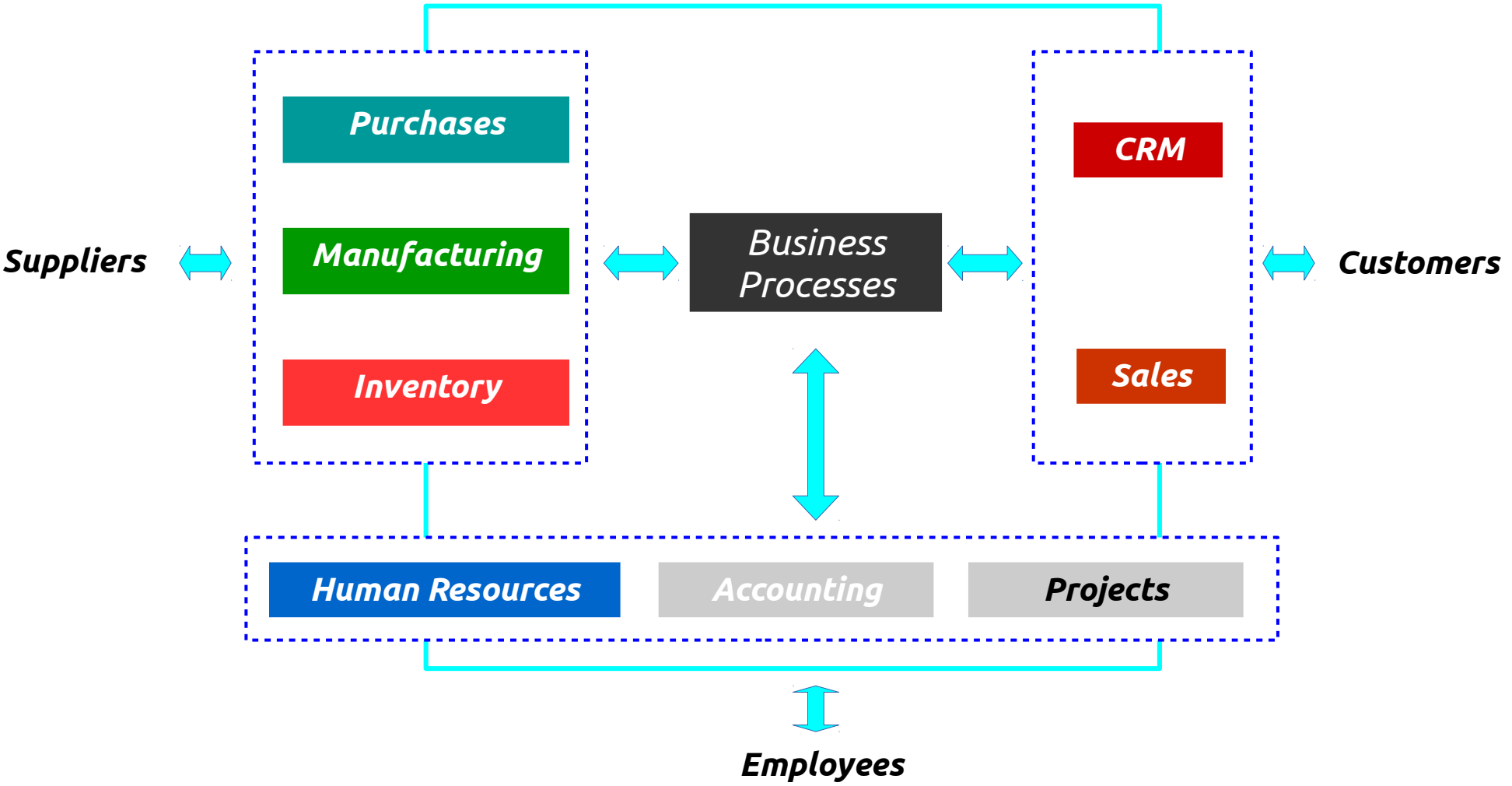
Summing-up

Integrated Business Process with Odoo



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Summing-up / ERP Modules

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

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Project Management

Project Management

Project Management Strategies

1. Identify value	2. Definition & Planning	3. Execution & Control	4. Close-Out & Support
→ Management Improvement → Increase Competitive Advantage → New Product / Service Development → Restructuring	→ Scope → Quality → Shedule & Deadlines → Budget → Ressources → Risk → Methodology & Deliverables	→ Cost → Time → Quality → Communications → Procurement → Risk → Human Resources	→ Project Completion → Reporting Results & deliverables → Training → Change Management → Continuous Improvement

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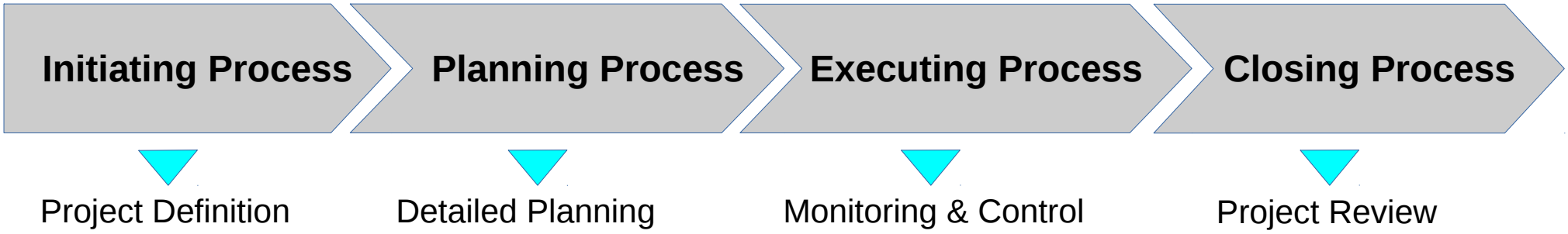
Project Lifecycle - Overview

« 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)



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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

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30 min

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.

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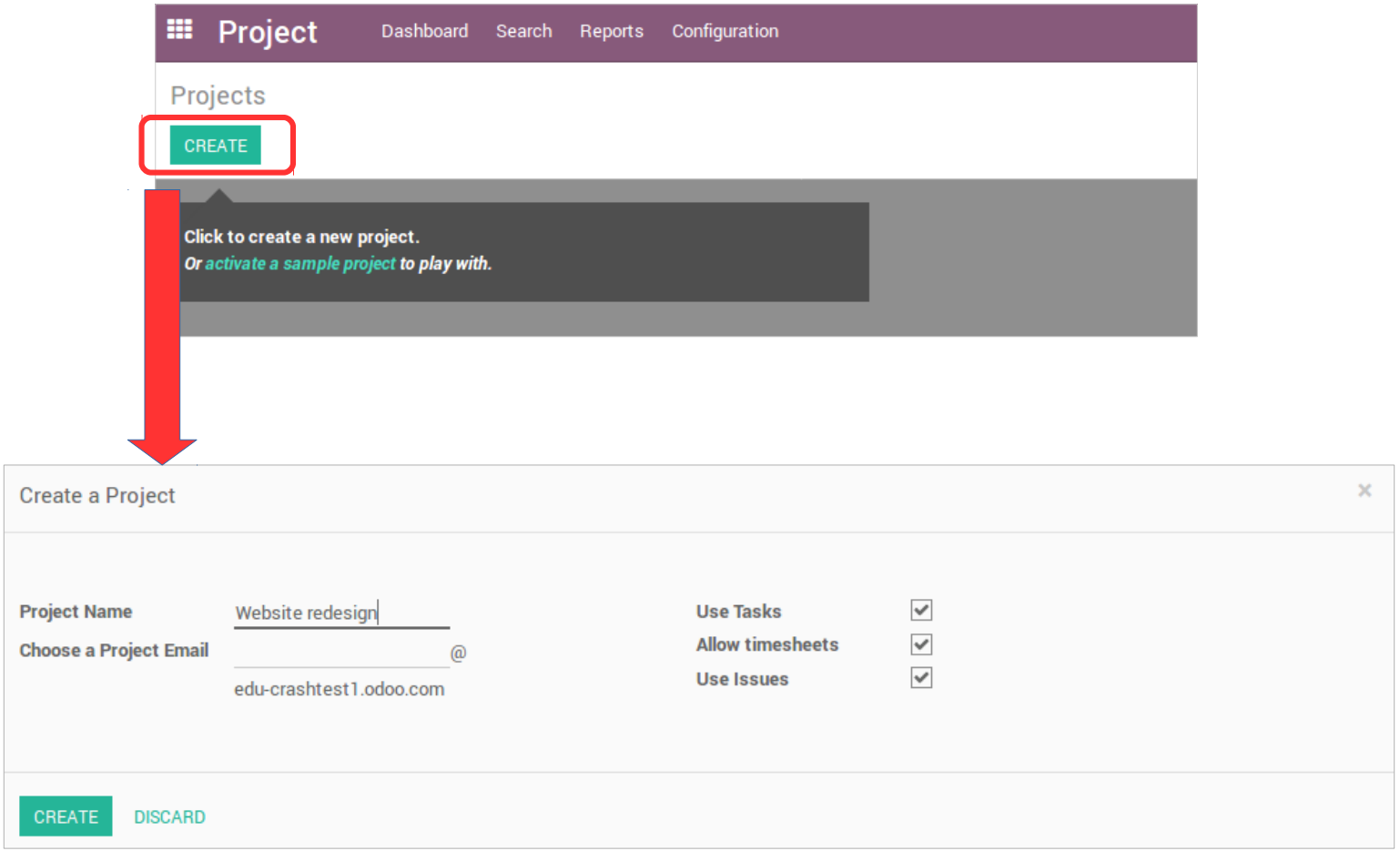
Projects – New Project



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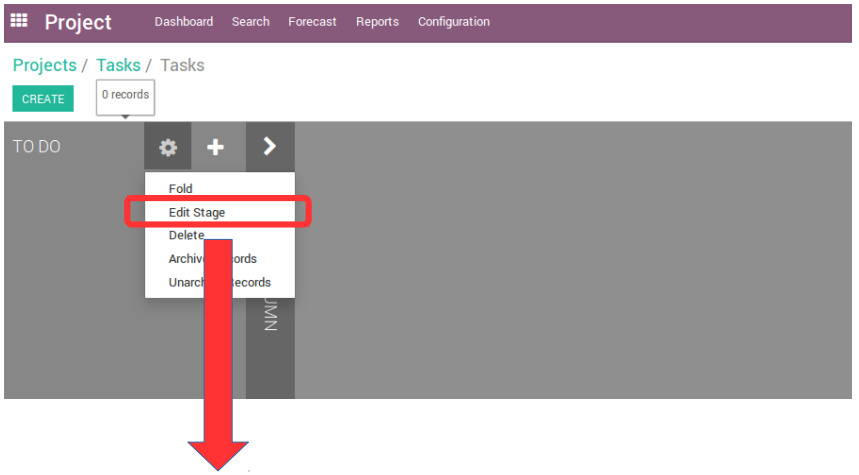
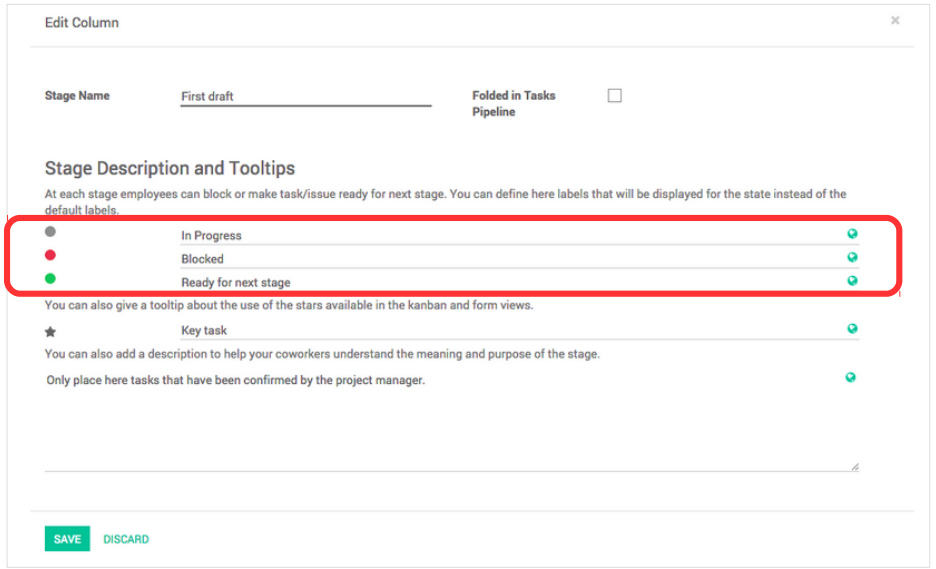
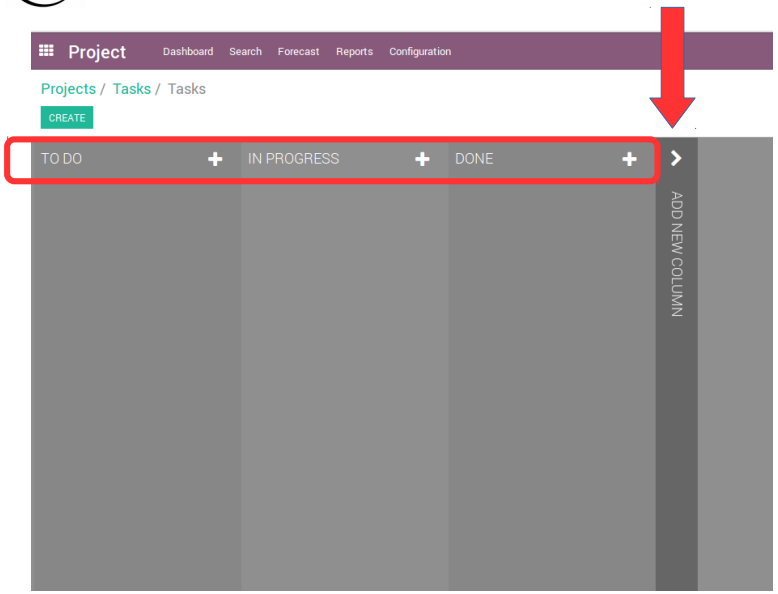
odoo Projects – Project Stages

1 Creating new stages





2 Add & rearrange stages



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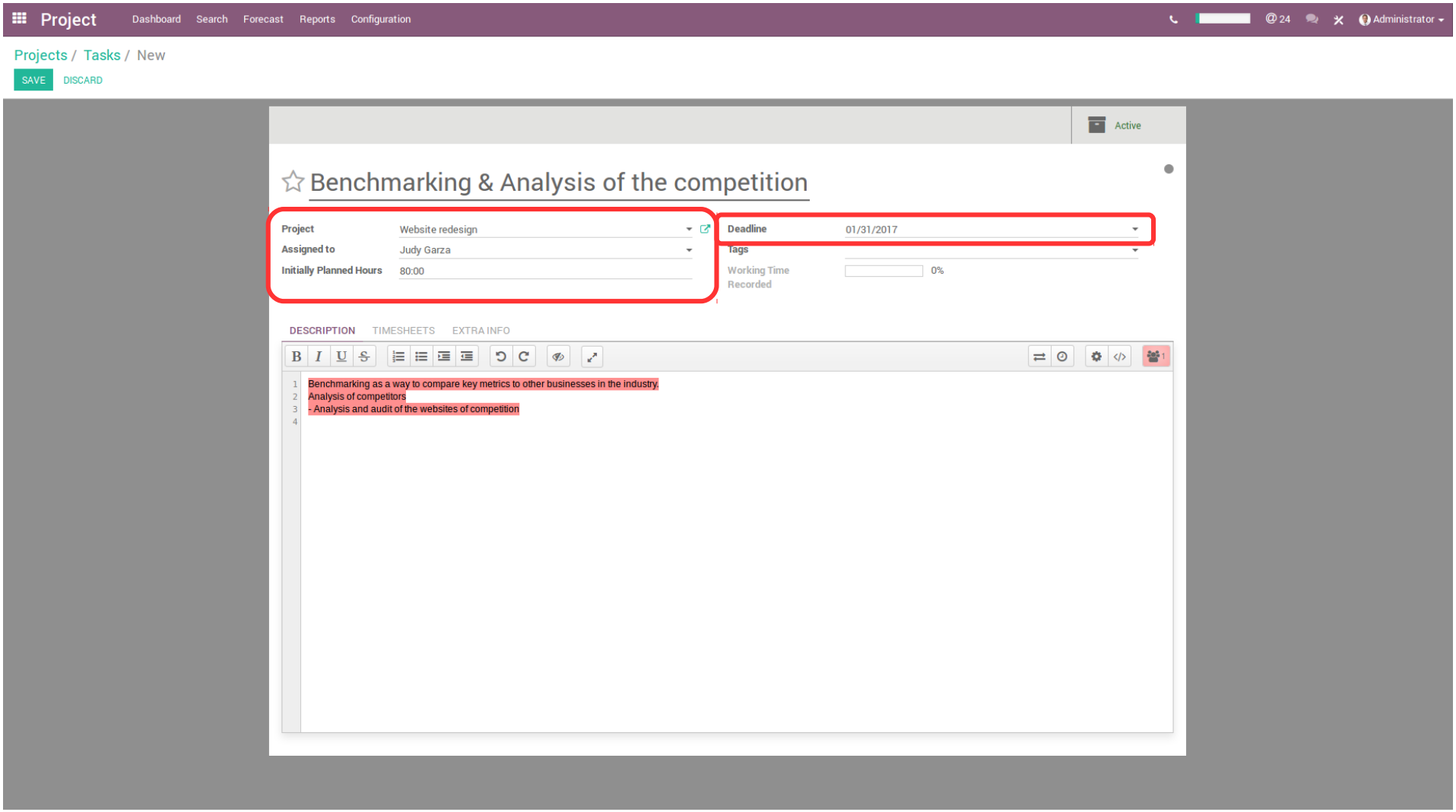
odoo Projects – Project Tasks



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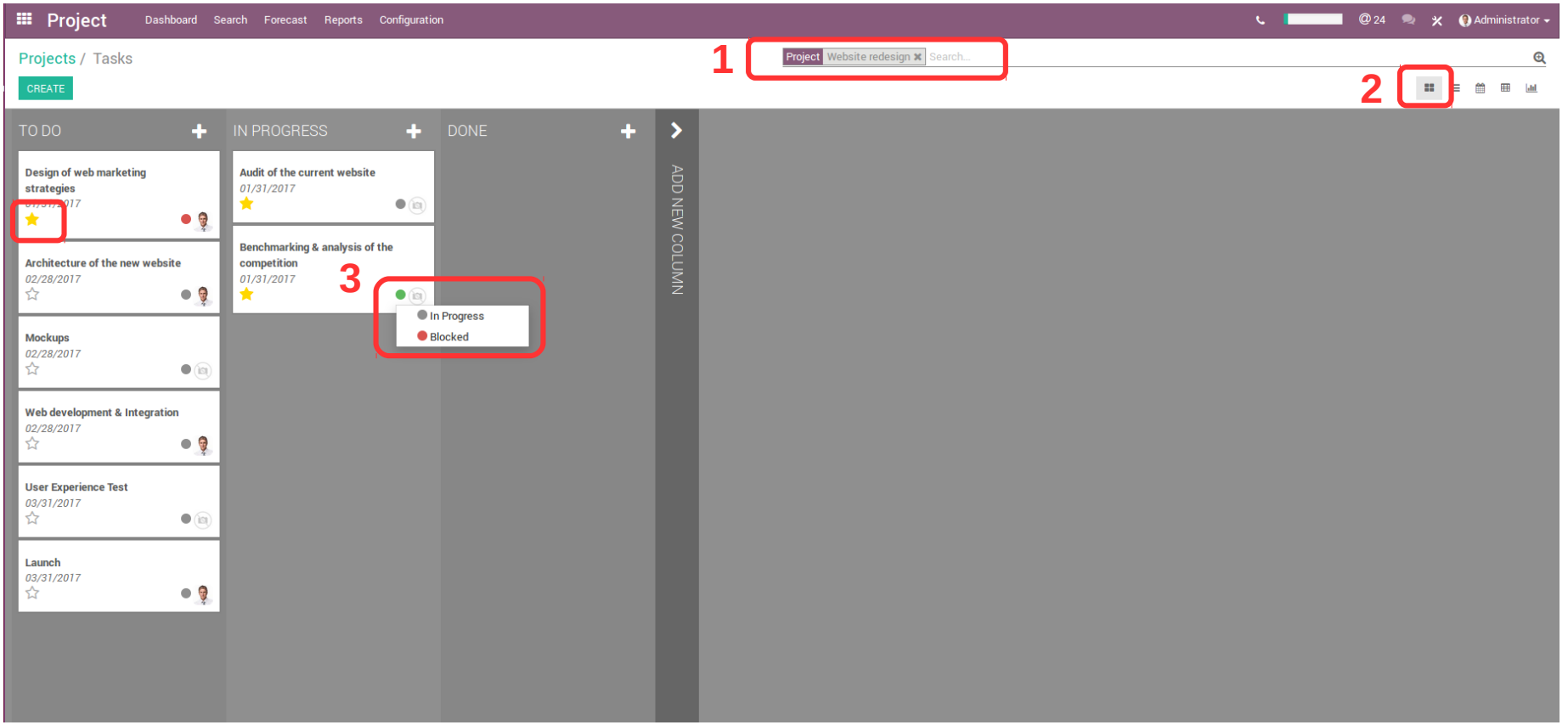
Projects – Overview of activities



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

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Record time spent

Projects – Recording timesheets

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

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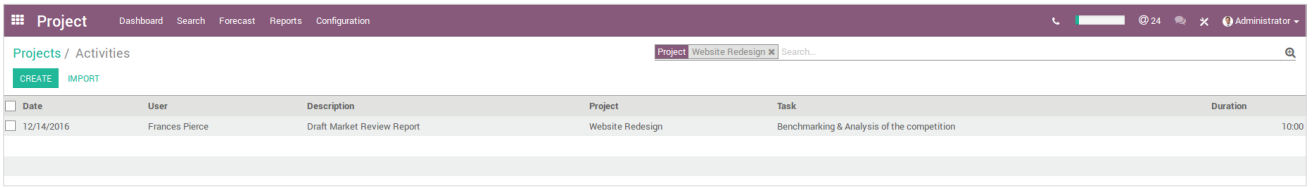
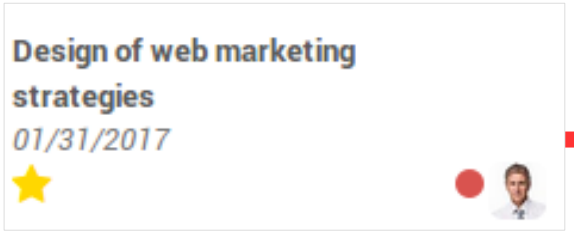
odoo Projects – Recording timesheets

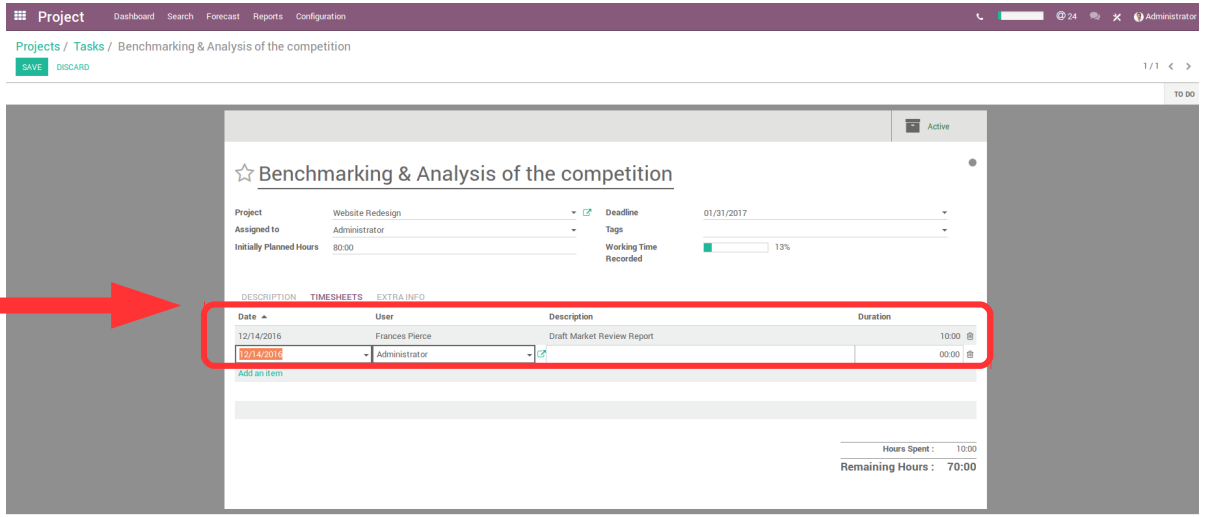
→ **Settings** ▶ **Timesheets** ▶ **Activate timesheets on issues**

1 Recording time in a project



2 Recording time in a task





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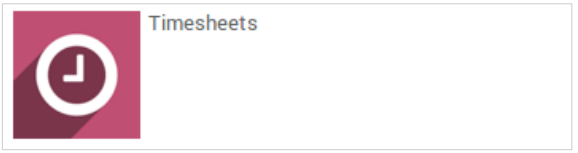
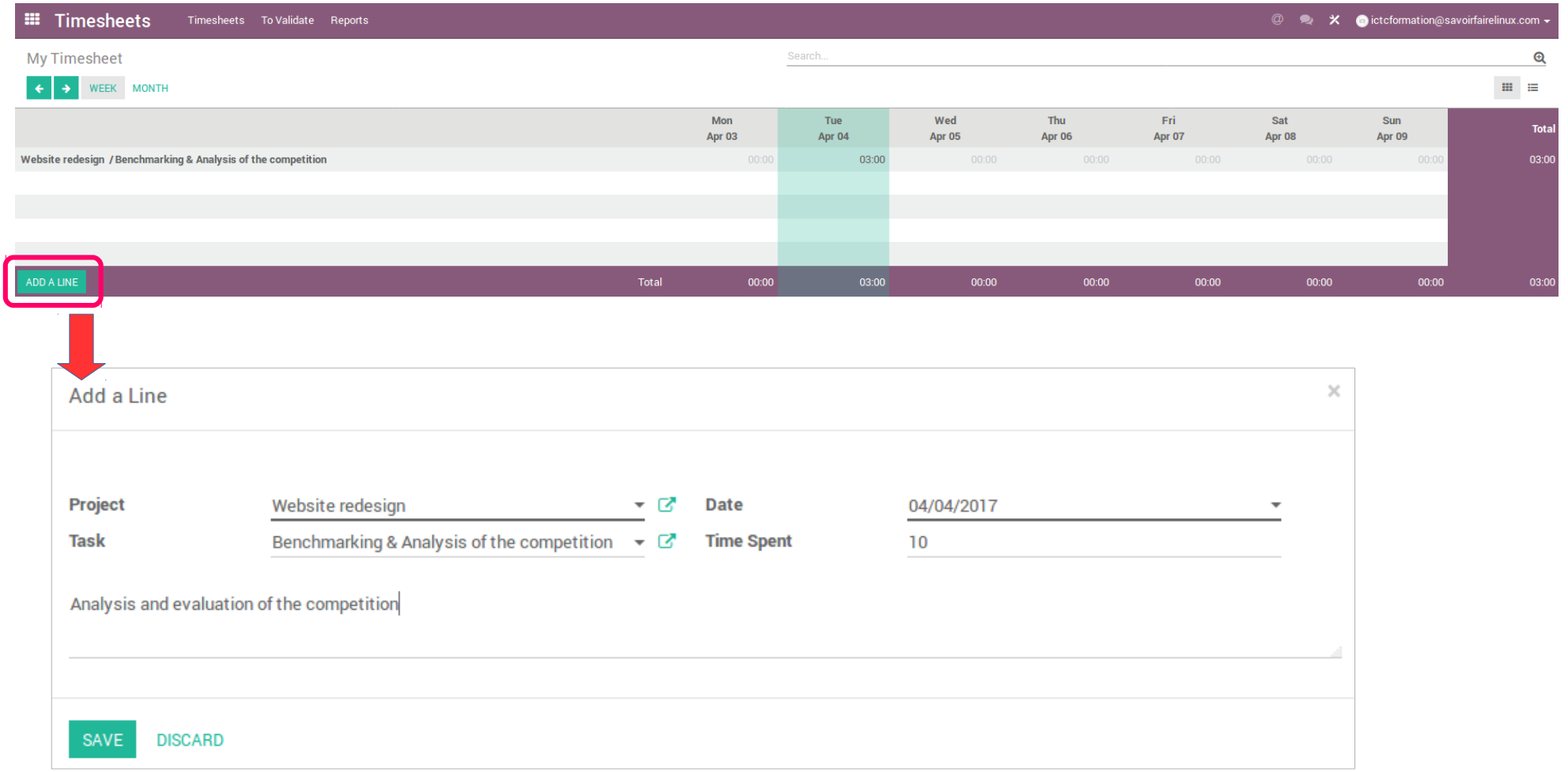
odoo Projects – Recording timesheets





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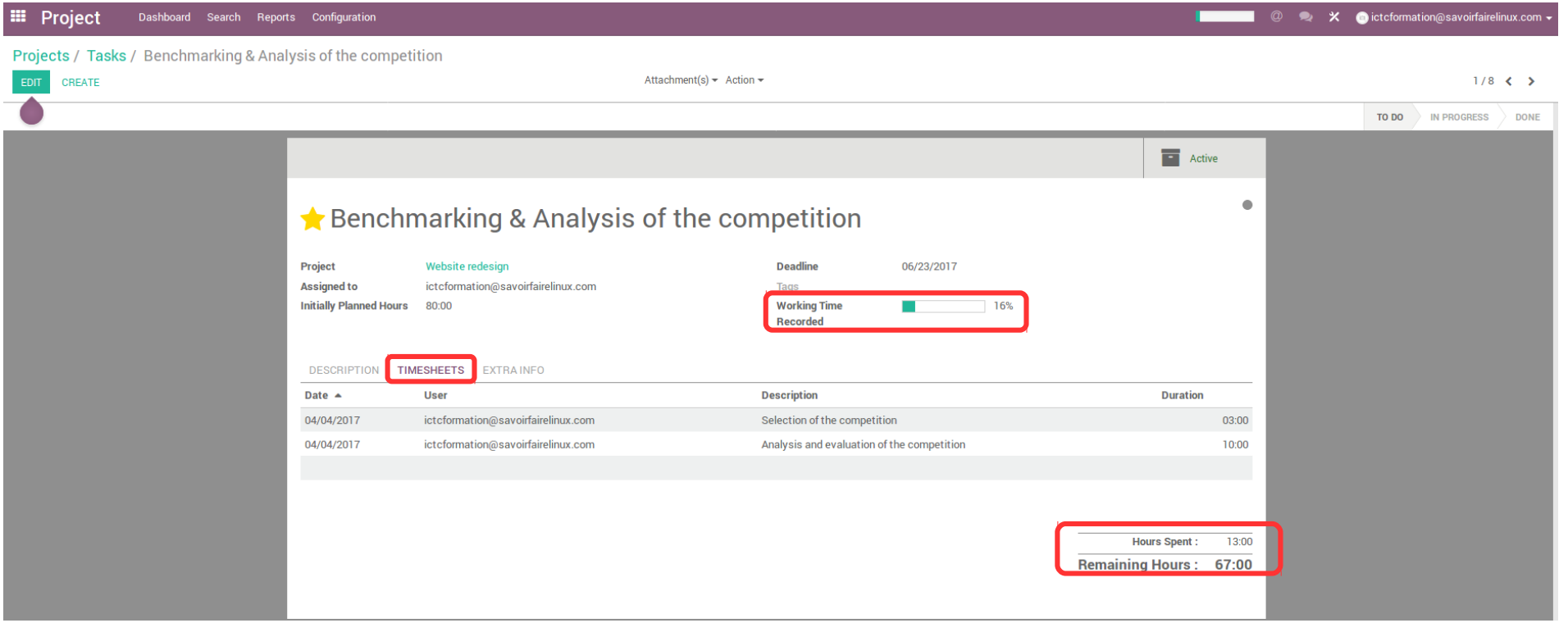
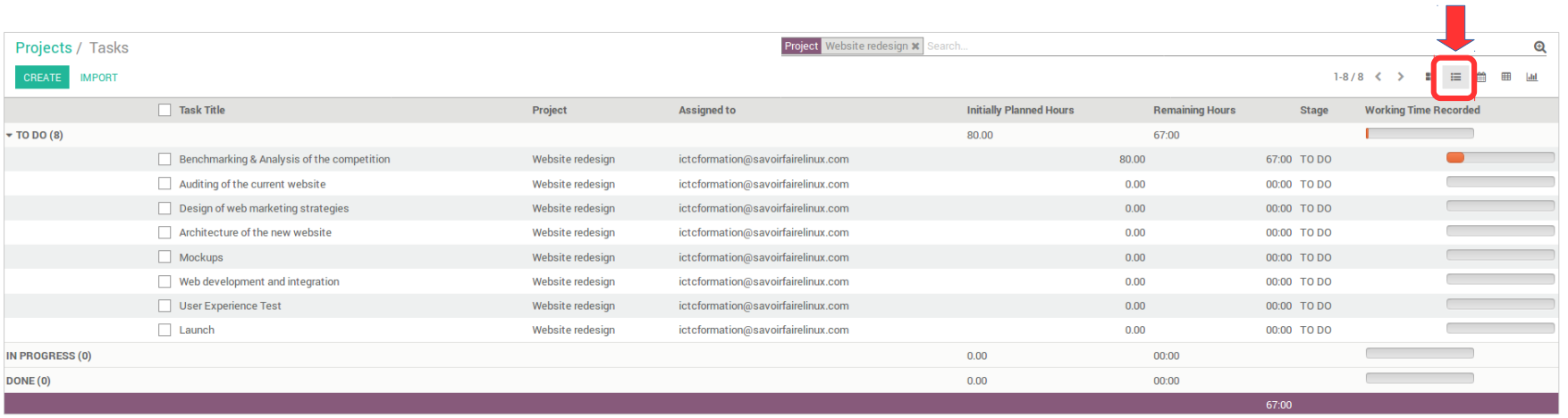
odoo Projects – Working Time Progress





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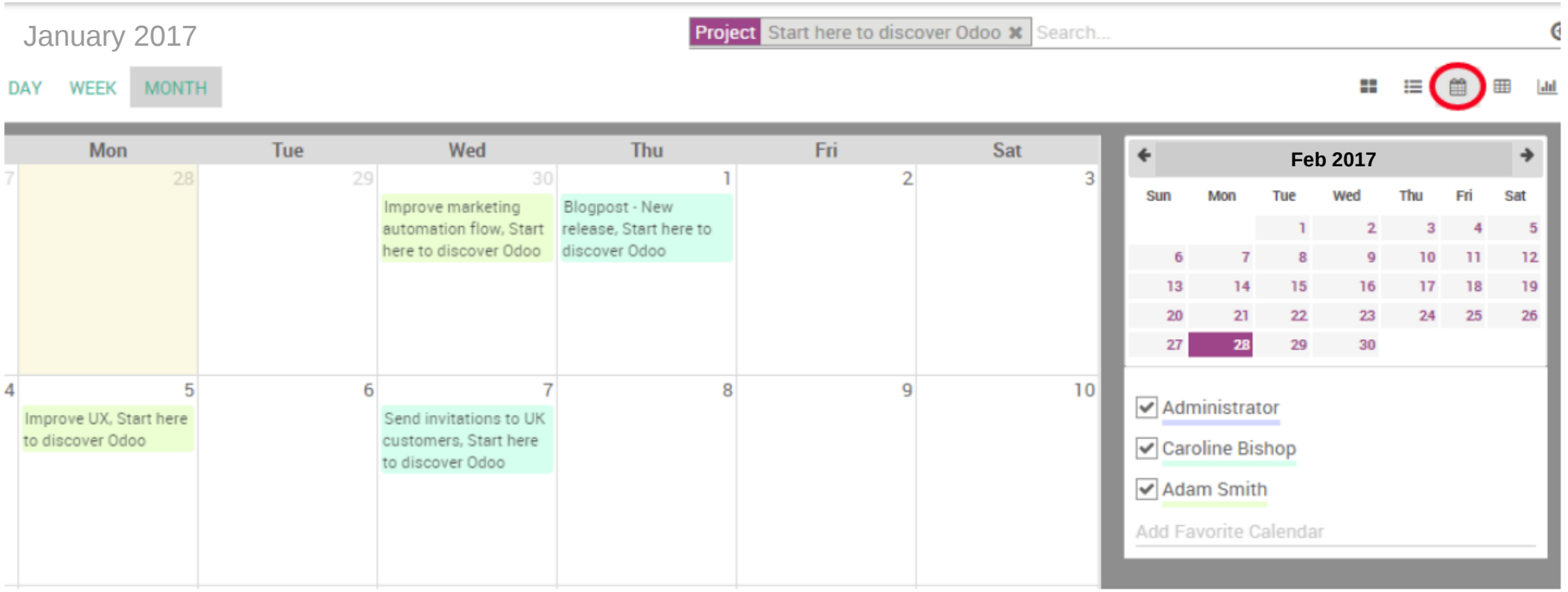
Projects – Deadlines with the Calendar view

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

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20 min

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.

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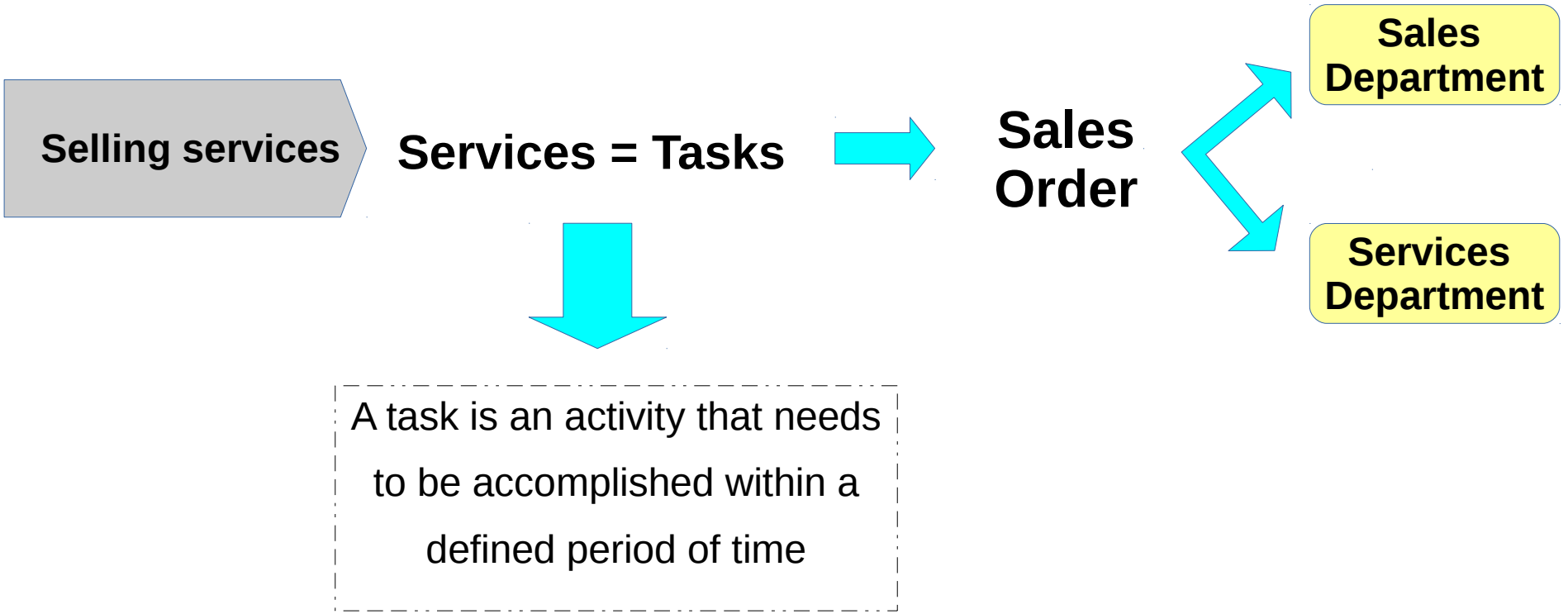
Project Management & Sales

Create tasks from sales order



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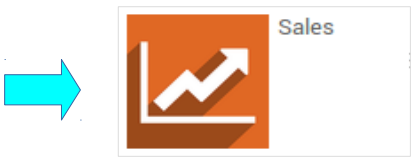
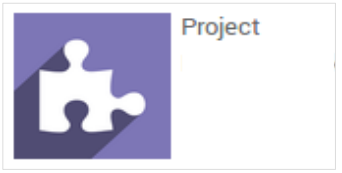
Integration with other Odoo Apps

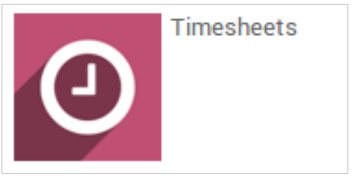
Selling a service



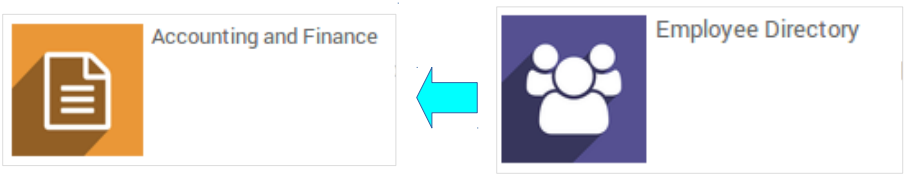
- *Sales Order*
- *Product Profile (Service)*



- *Tasks*
- *Deadlines*
- *Employees*



Record time spend on each job by employee



- *Service Billing*
- *Payroll*

- *Update calendars automatically*
- *Summary of time worked in a job*

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30 min

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.

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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)

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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

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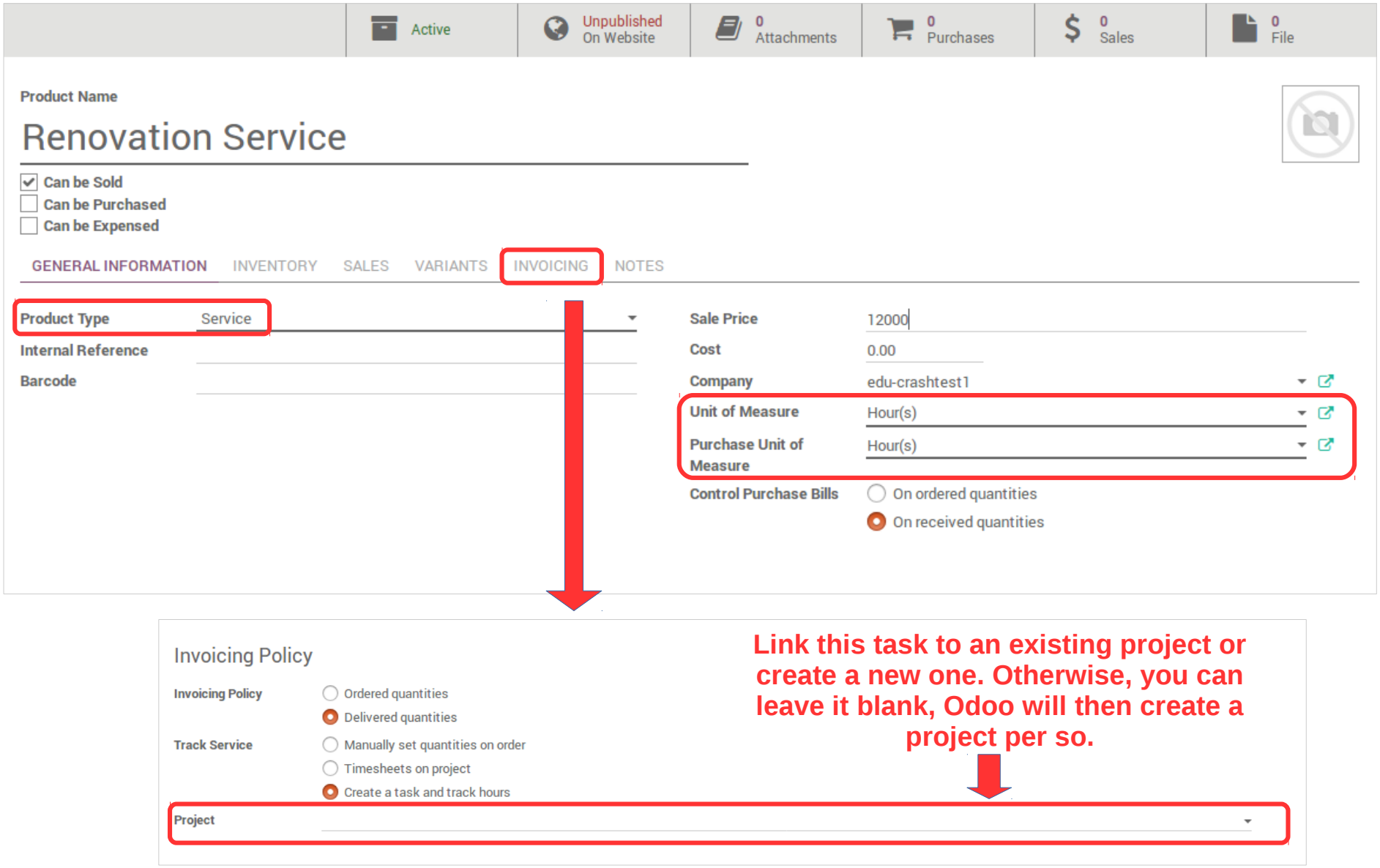
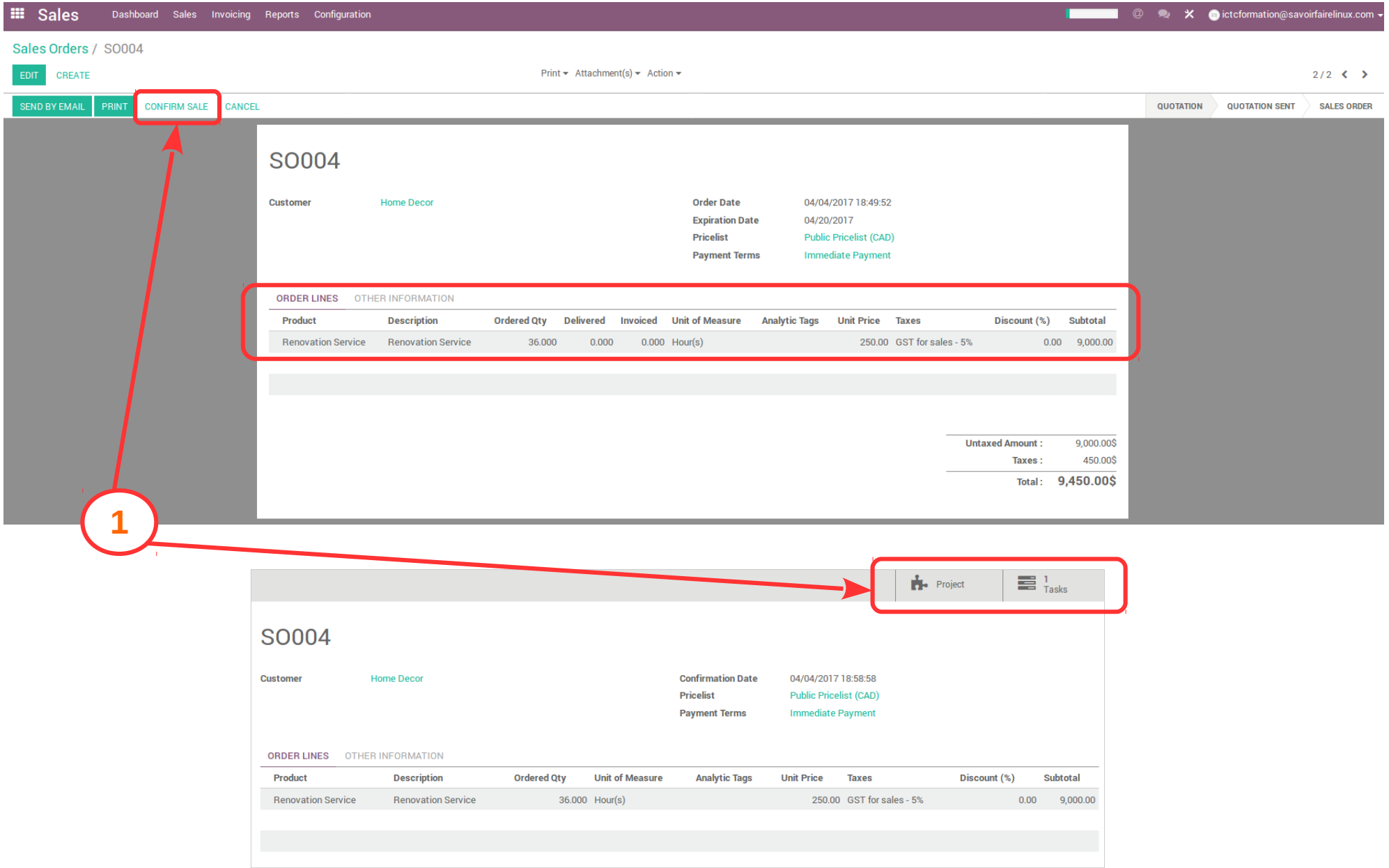
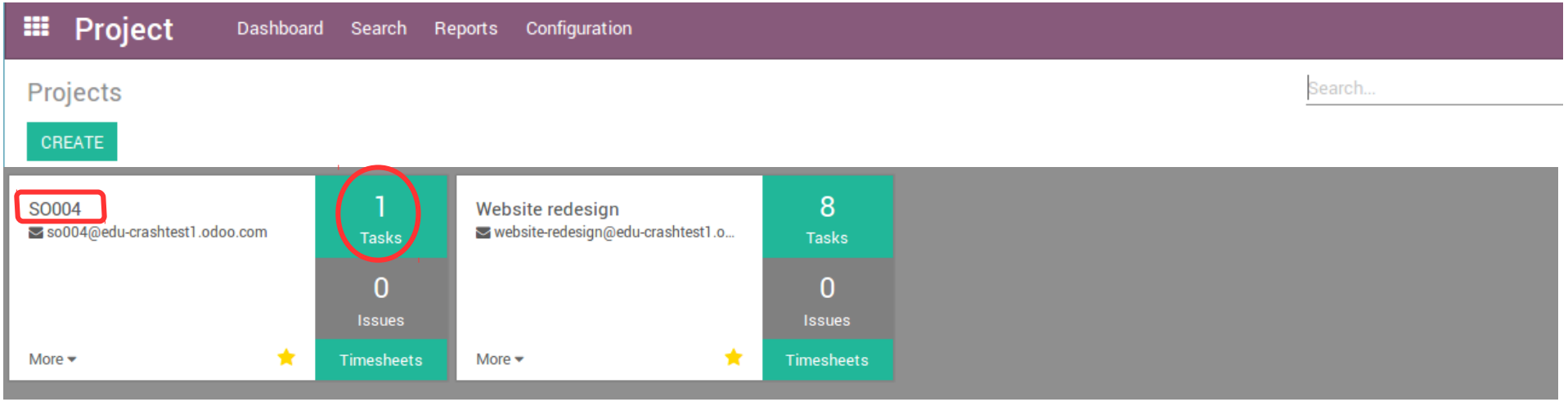
Create and set up a product (service)



odoo Create the Sales Order



Access the task generated from the sale order



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

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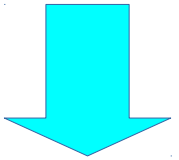
Issue Tracking

Projects to handle claims/issues

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

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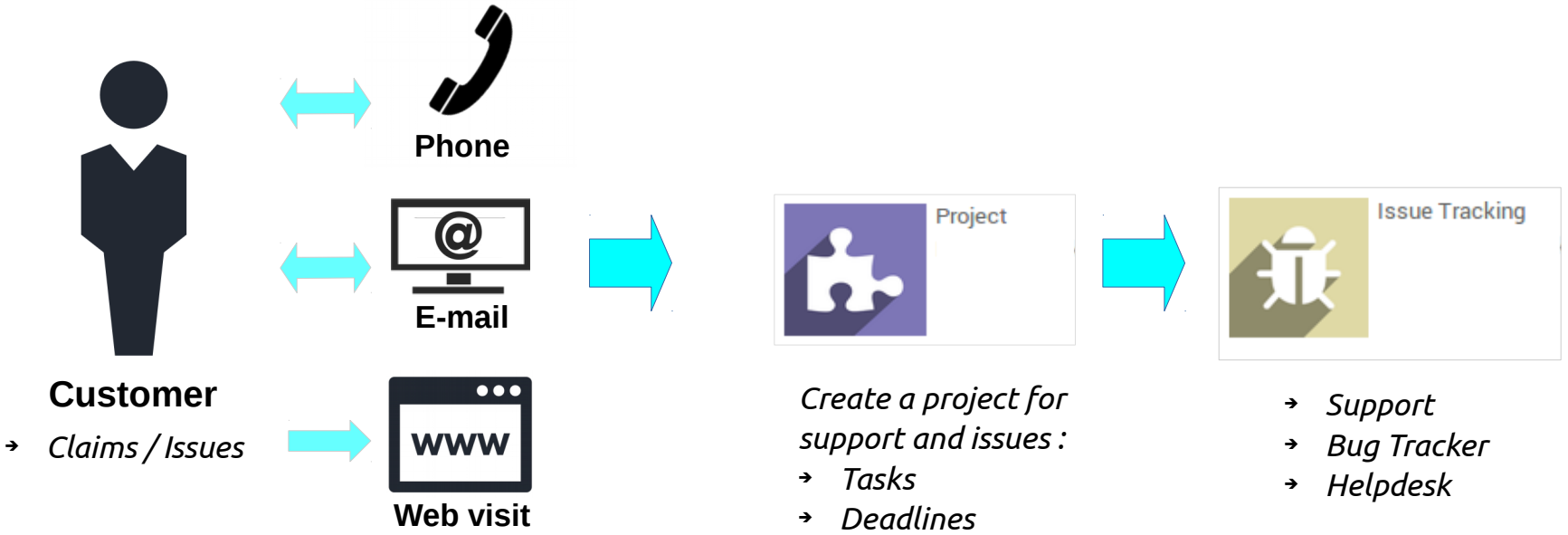
Integration with other Odoo Apps



Create a project for support and issues :

- *Tasks*
- *Deadlines*
- *Employees*

- *Support*
- *Bug Tracker*
- *Helpdesk*

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30 min

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.)*

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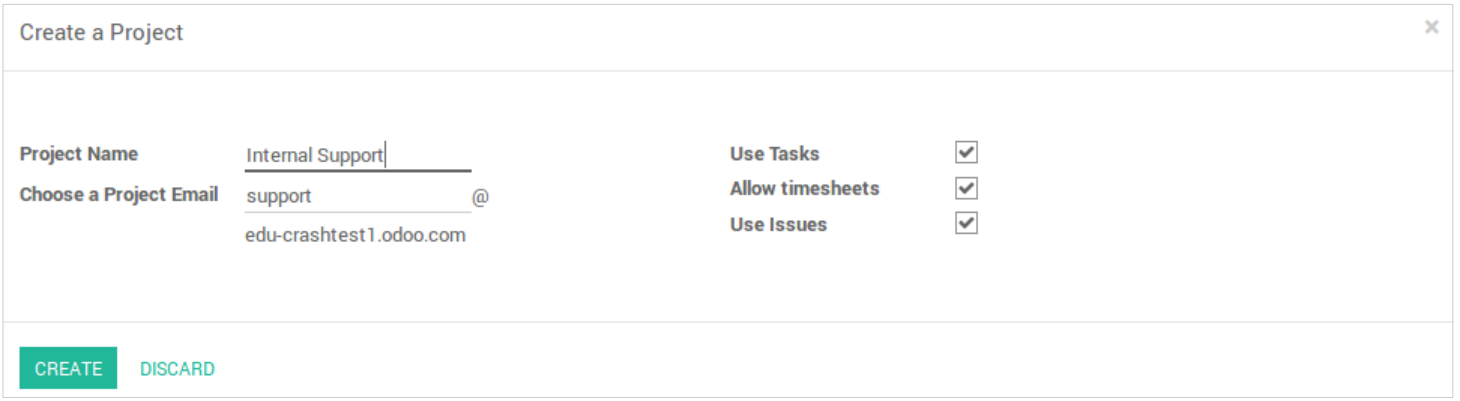
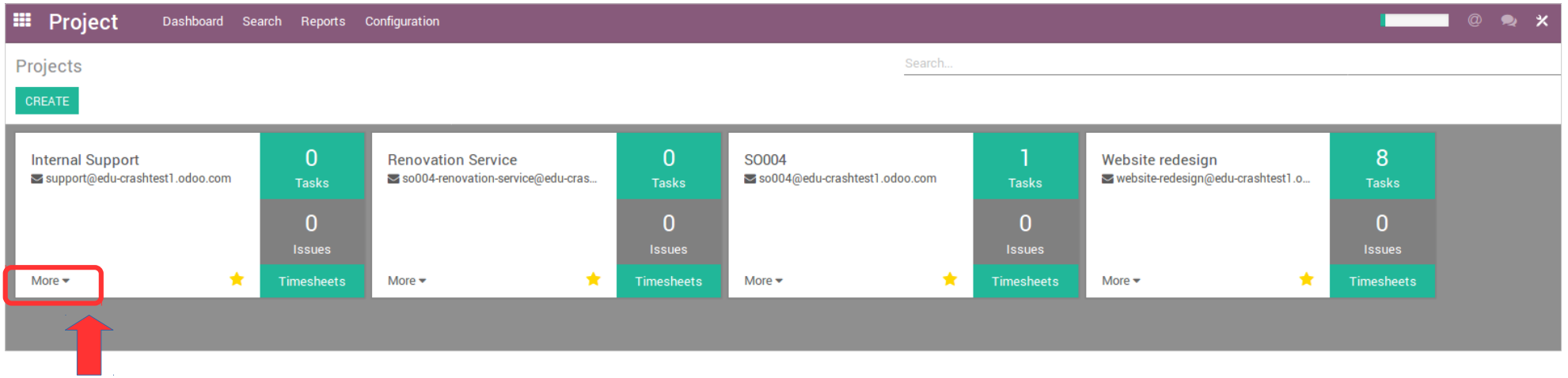
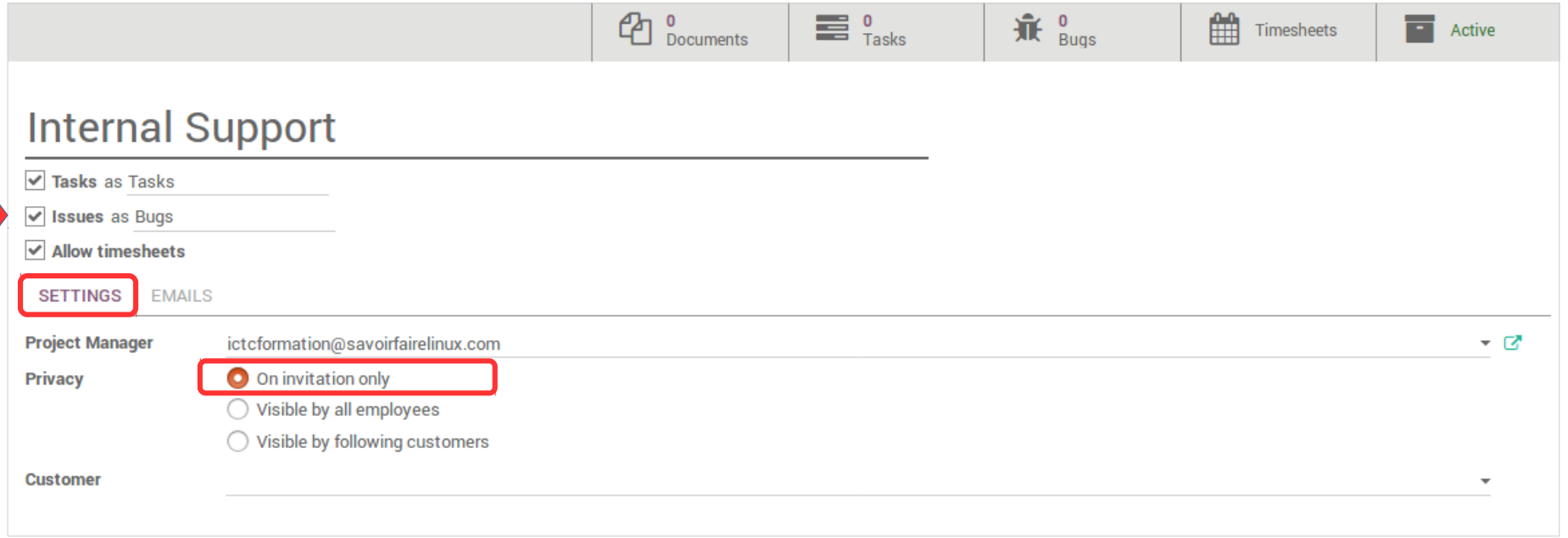
Creating a support project

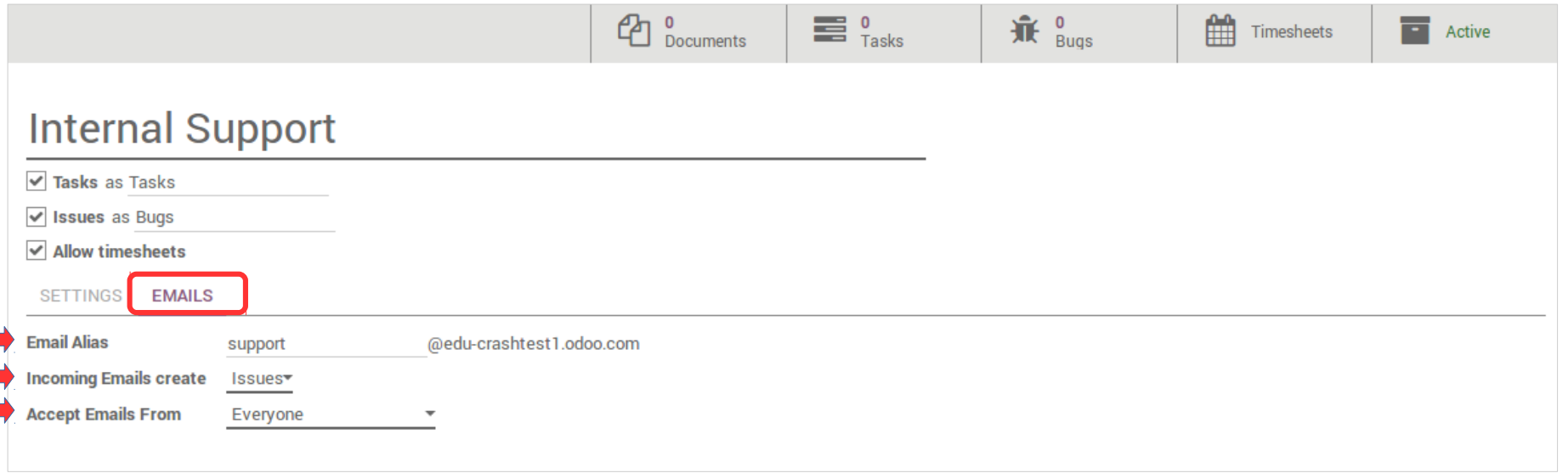




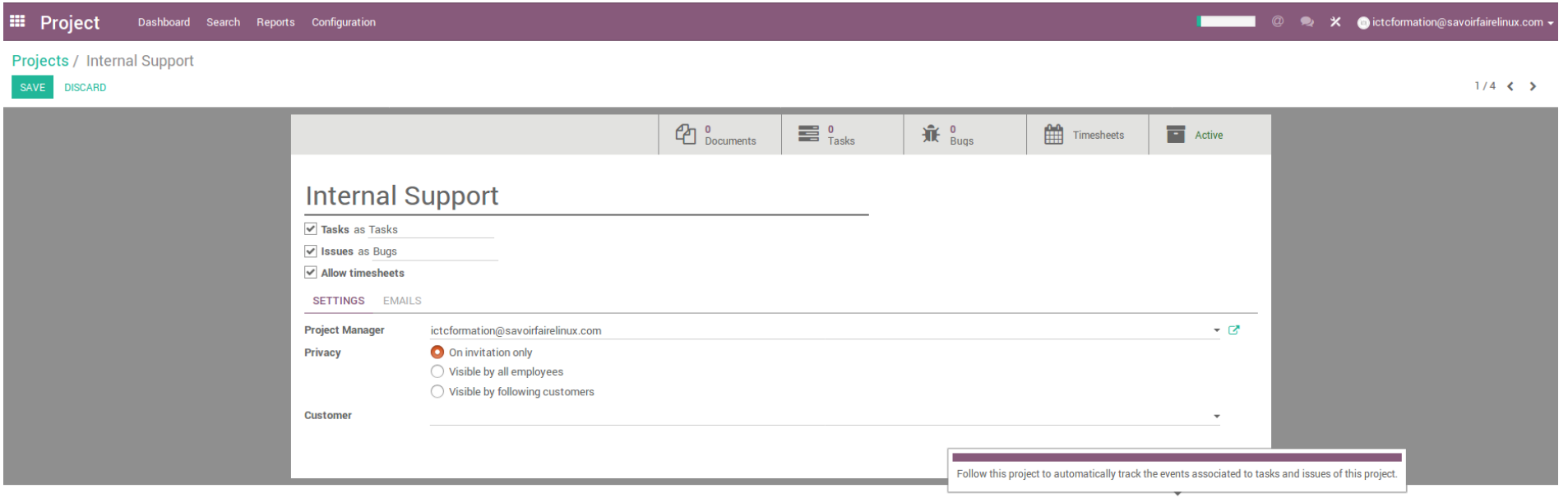
Settings

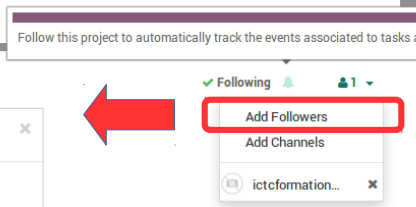
Creating a support project

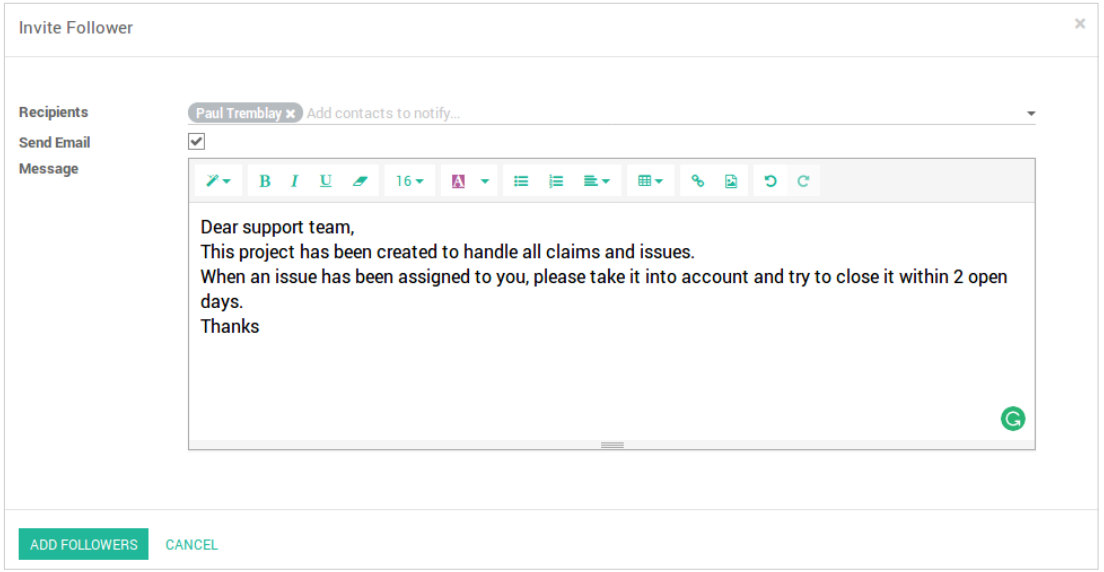




Issues assigned to employees

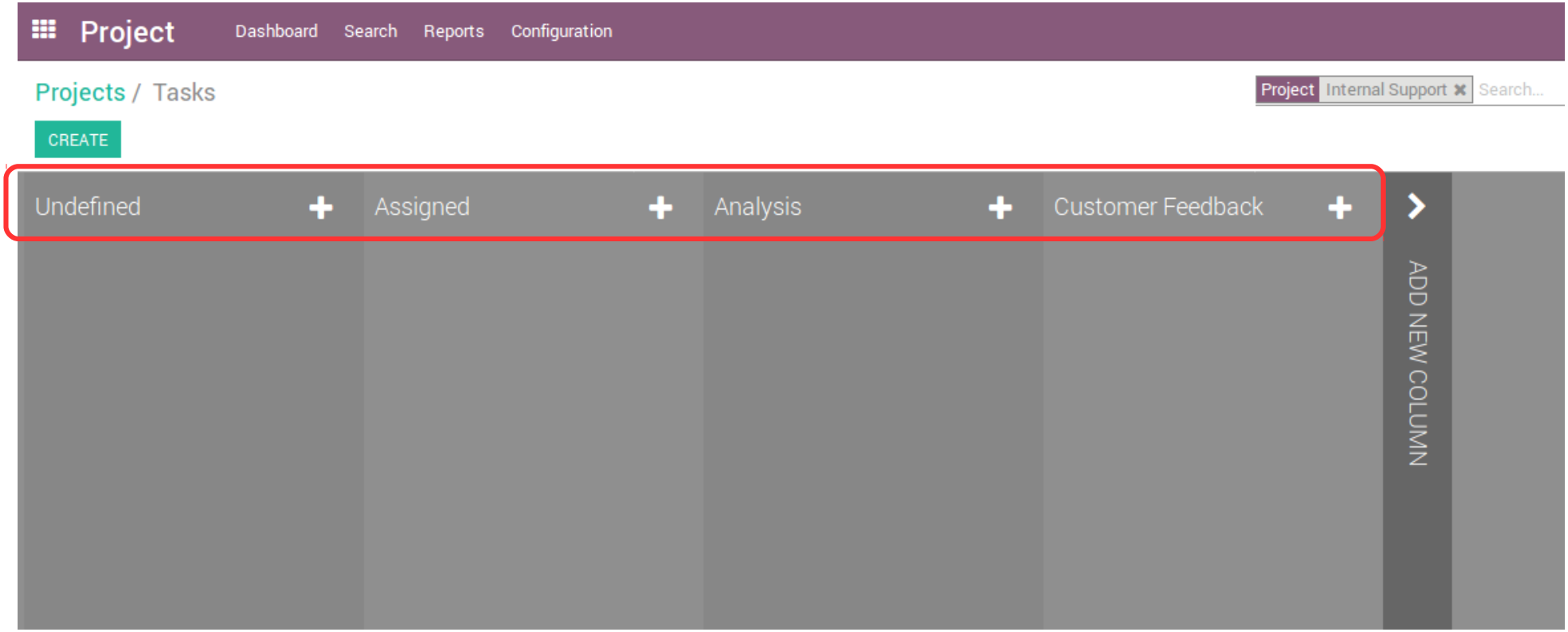






Adding a follower means that this person will be notified of any changes that might happen in the task.

Set up the workflow



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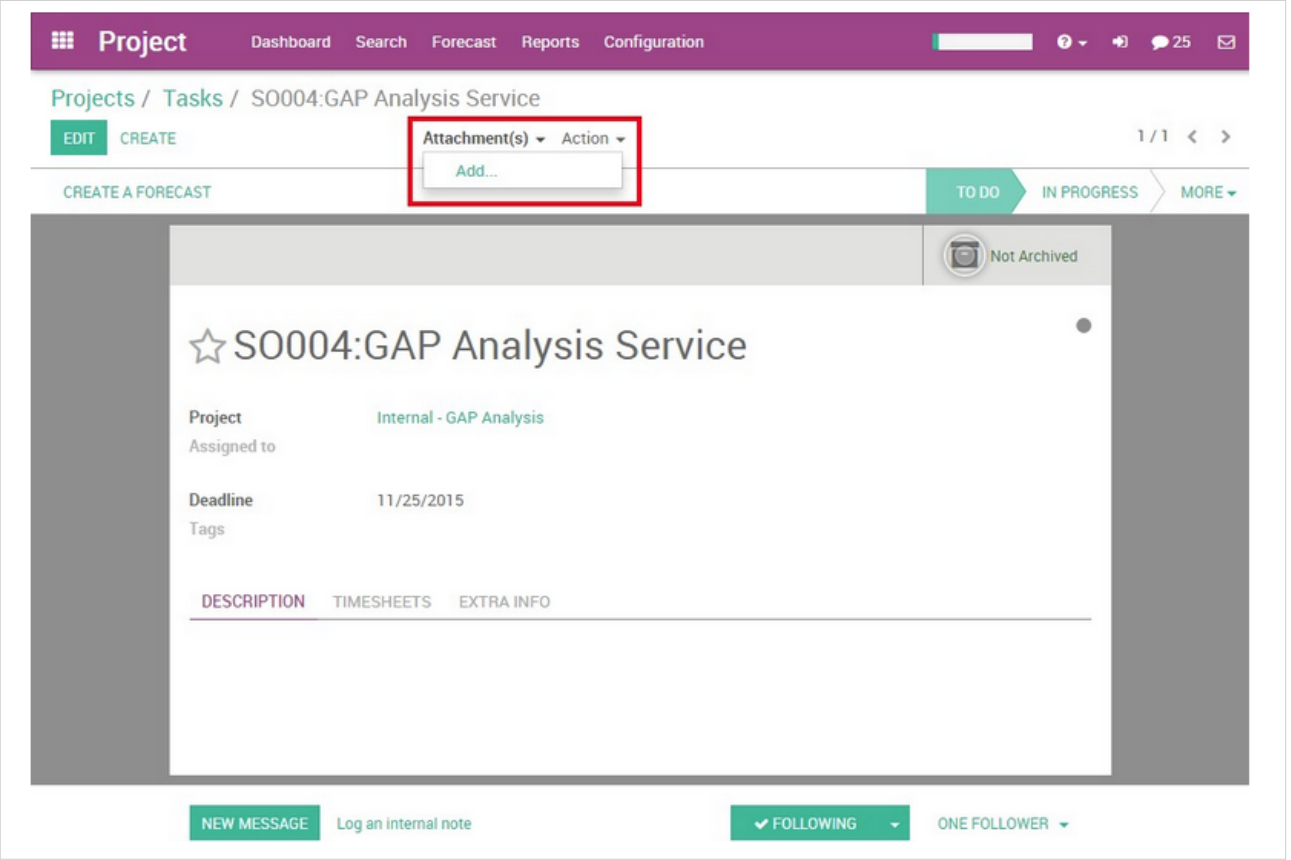
Document Management in tasks

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.



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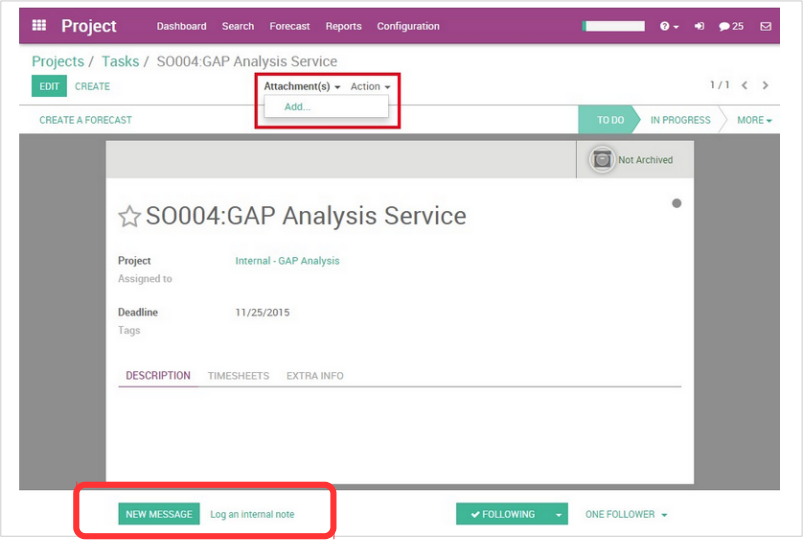
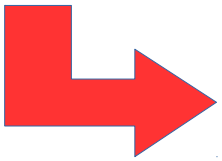
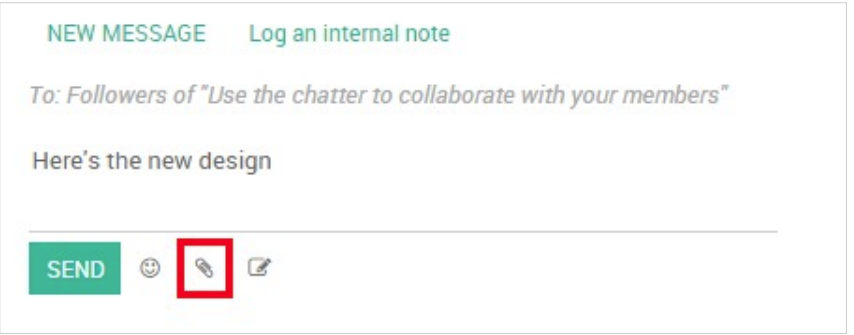
Document Management in Tasks

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.







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Questions?

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Contributions

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- Guillaume Lot

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

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