ODOO ERP

23/02/24

QNOMIX
TECHNOLOGIES

Ms. Shami Rana Shah
QNOMIX TECHNOLOGY

Proprietary Notice:

This document contains confidential information of **Qnomix Technology** and **Fettle Insurance** In consideration of receipt of this document, the recipient agrees to maintain such information in confidence and not to reproduce or otherwise disclose this information to any person outside the group directly responsible for evaluation of its contents.

This document contains current process descriptions and requirements for the purpose of **Odoo** (ERP) Implementation. The major contents of this document include process objectives, users' requirements and expectations, process description gaps, improvements, major inputs, major output and Key MIS requirements. This document is the outcome of various levels of interactions with Core Team of **Fettle Insurance.**

Corporate Office:

Fettle Insurance.

Factory:

601, Anam 1, (6th Floor)
Next to JMC house,
Opp. Parimal Garden, Ambawadi,
Ahmedabad - 380006

Phone: +91- 8849052909

Document Control:

Document Title	Business Requirement Document (AS-IS & TO-BE)
Purpose	Document detailing existing process and corresponding mapped process in Odoo ERP.
Prepared by	Ms. Shami Rana Shah
Verified by	Mr. Naishil Shah
Revised by	
Version	1.0

Version No.	Date	Prepared by/ Modified by	Significant	Reviewed by
1.0	13/02/24	Ms. Shami Rana Shah	Draft Document	

Company Team / Process Owner:

Area	Department	Name
Delivery Head	Delivery	Mr. Kaushik Panchal
Project Manager	PMS – Project Management	Mr. Naishil Shah
Technical Head	Odoo – Technical	Mr. Kaushik Panchal
Functional Head	Odoo – Functional	Ms. Shami Rana Shah
Ground Team	Odoo – Other	

Customer Team / Process Owner:

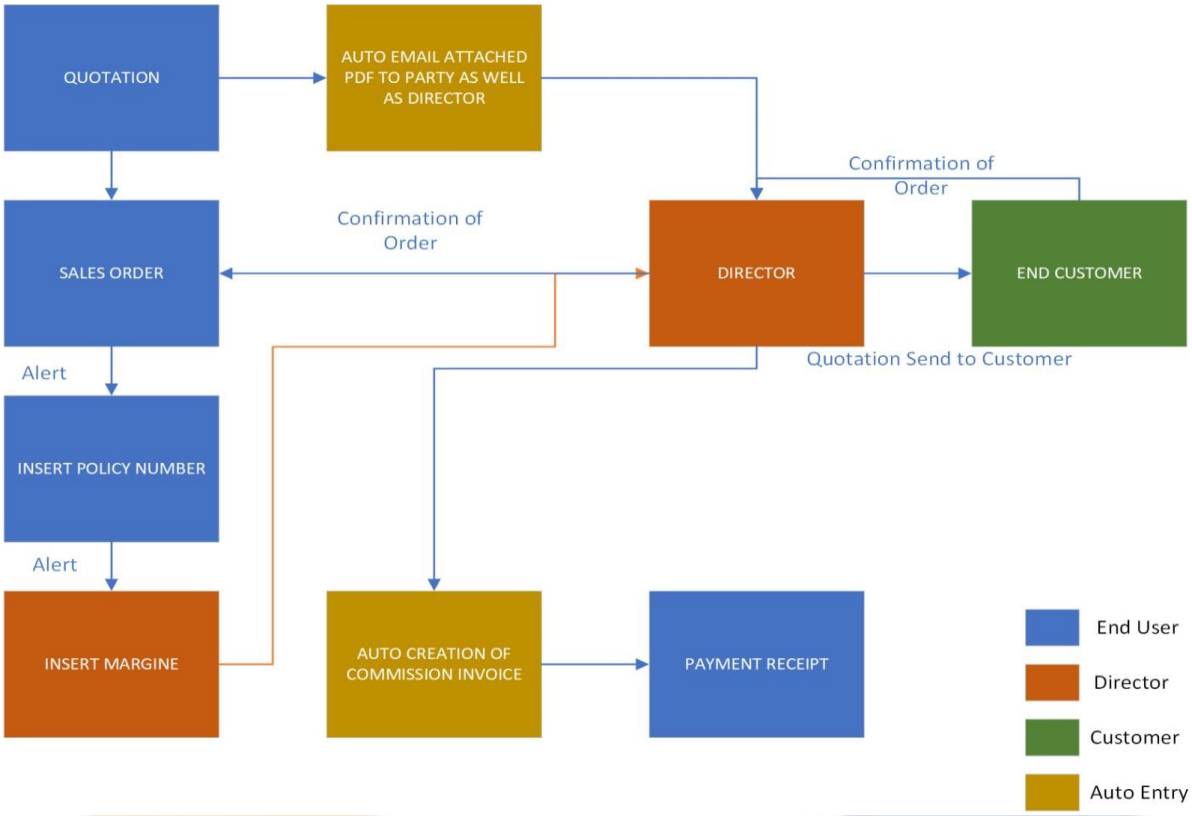
Area	Department	Name
Director	Head	Mr. Rishabhbhai Tilokchandra Zaveri
Director	Head	Mr. Chirag Bachubhai Shah
Project Manager	PMS – Project Management	Mr. Riteshbhai Patel
Software Consultant	Consultant	Mr. Riteshbhai Patel
Director	Head	Mr. Rumit Ashokbhai Patel
Operational Functional	CRM - Sales	Ms. Ekta Chavda
Operational Functional	CRM - Sales	Ms. Sapana Thakure

Table of Contents

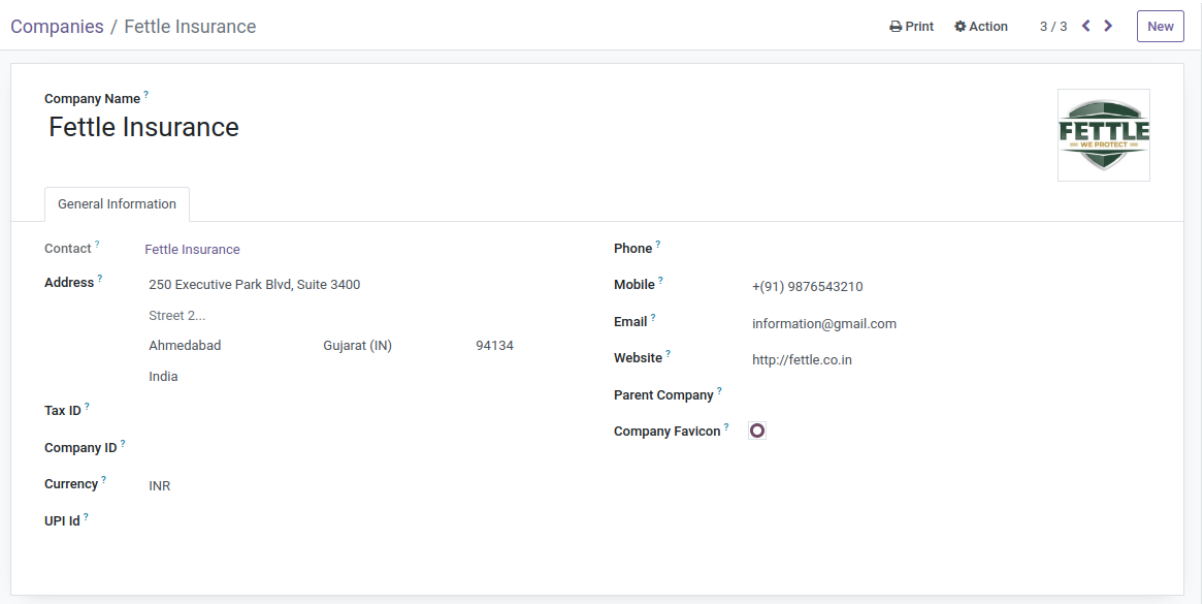
Drafting: 6
Company 7
Owner: 9
Insurance Companies – Customer Master 10
Customers 12
Product Master (policy) 13
Product master (MOTOR) 17
Sales Quotation: 20
Sales Order: 23
Commission Screen: 24
Commission Invoice: 25
Register Payment: 27
Commission Invoices with Payment Status: 28
Payment receipt: 29
Claim (to-claim) 29
Manufacturer 30
Model Lists 31
Details of model 31
List of vehicles 32
Vehicle Details 33
Claim Dashboard 34
Claim Requests by Stages: 35

TPA/ Surveyor.....35
Suggested Policies on Policy.....36
Claim Requests: 37
Dashboards for sales policy.....38
Dashboard by Policy.....39

Drafting:


QUOTATION
AUTO EMAIL ATTACHED PDF TO PARTY AS WELL AS DIRECTOR
Confirmation of Order
SALES ORDER
Confirmation of Order
DIRECTOR
END CUSTOMER
Quotation Send to Customer
Alert
INSERT POLICY NUMBER
Alert
INSERT MARGINE
AUTO CREATION OF COMMISSION INVOICE
PAYMENT RECEIPT
End User
Director
Customer
Auto Entry

Company



#	Name	Input Type	Relation	Required?	Comment
1	Company Name	Char			
2	Contact	M2o	res.partner		
3	Address	Char			
4	Tax ID	Char			
5	Company ID	Char			
6	Currency	M2o	res.currency		
7	Phone	Char			
8	Mobile	Char			
9	Email	Char			
10	Website	Char			
11	Parent Company	M2o	res.company		
12	Company Favicon	binary			

Fettle Insurance Company - Form Description

Here's a breakdown of the form's sections:

Company Details:

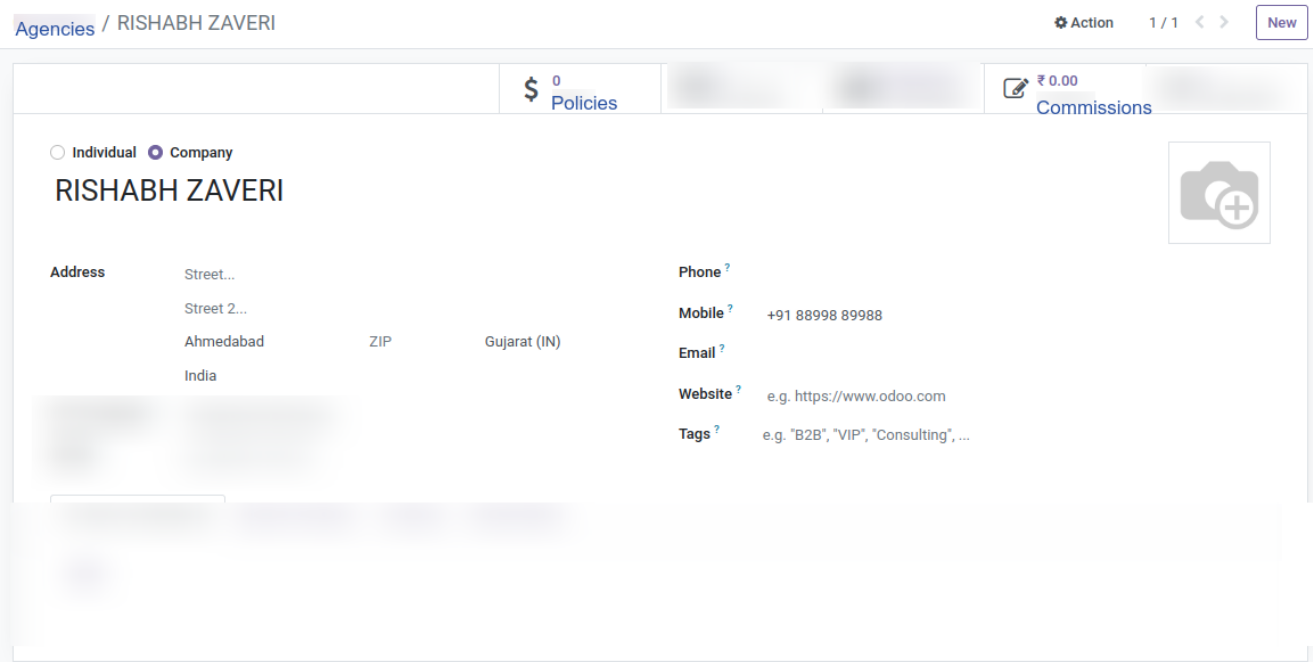
- **Company Name:** Enter the legal name of your company.
- **Contact:** Provide details of your designated contact person, including their name, phone number, and mobile number.
- **Address:** Enter your company's full address, including street address, optional additional address line, city, state, ZIP code, and country.
- **Tax ID:** Input your company's tax identification number.
- **Company ID:** Provide your company's unique identifier.
- **Currency:** Select the currency your company primarily uses from the dropdown menu.
- **UPI ID:** If your company utilizes a UPI ID for transactions, enter it here.
- **Website URL:** Provide the URL of your company's website, if applicable.
- **Parent Company:** Indicate the name of your parent company, if any.
- **Company Favicon:** Upload a small image representing your company (e.g., logo).

Optional Buttons:

- **Print:** The functionality of this button is unclear from the image.
- **Action:** The purpose of this button is also unclear without further context.

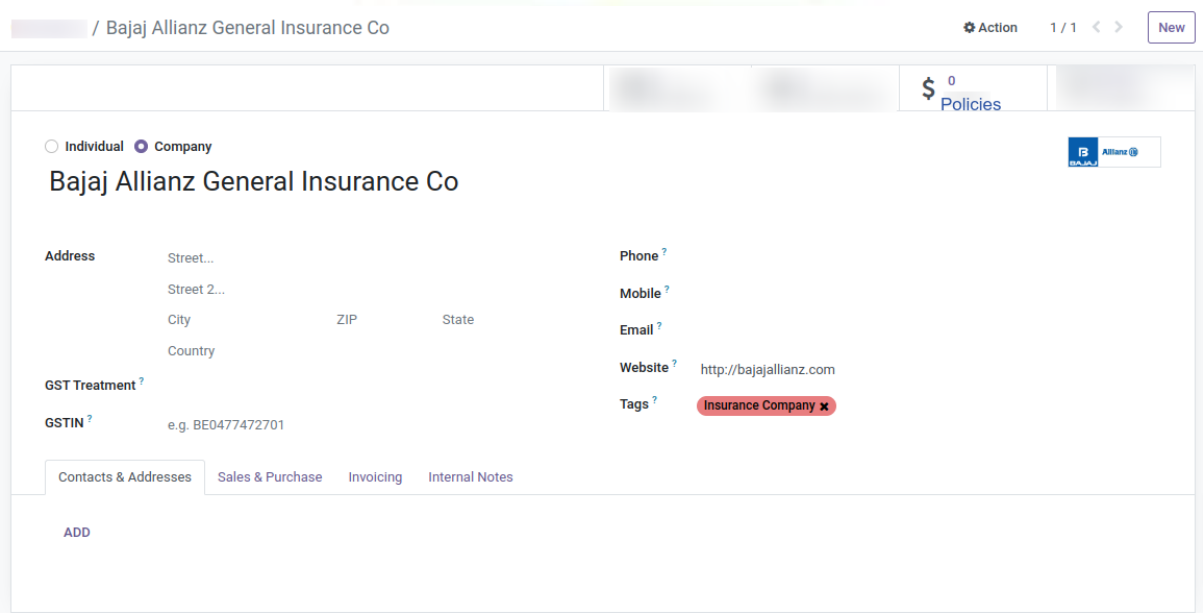
- All fields marked with an asterisk (*) are mandatory.
- Double-check your information before submitting the form to ensure accuracy.

Owner:



#	Name	Input Type	Relation	Required?	Comment
1	Company Type	Selection			
2	Name	Char			
3	Address	Char			
4	Phone	Char			
5	Mobile	Char			
6	Email	Char			
7	Website	Char			
8	Tags	M2m	res.partner.category		

Insurance Companies – Customer Master



#	Name	Input Type	Relation	Required?	Comment
1	Company Type	Selection			
2	Name	Char			
3	Address	Char			
4	GST Treatment	Selection			
5	GSTIN	Char			
6	Phone	Char			
7	Mobile	Char			
8	Email	Char			
9	Website	Char			
10	Tags	M2m	res.partner.category		

Company Information:

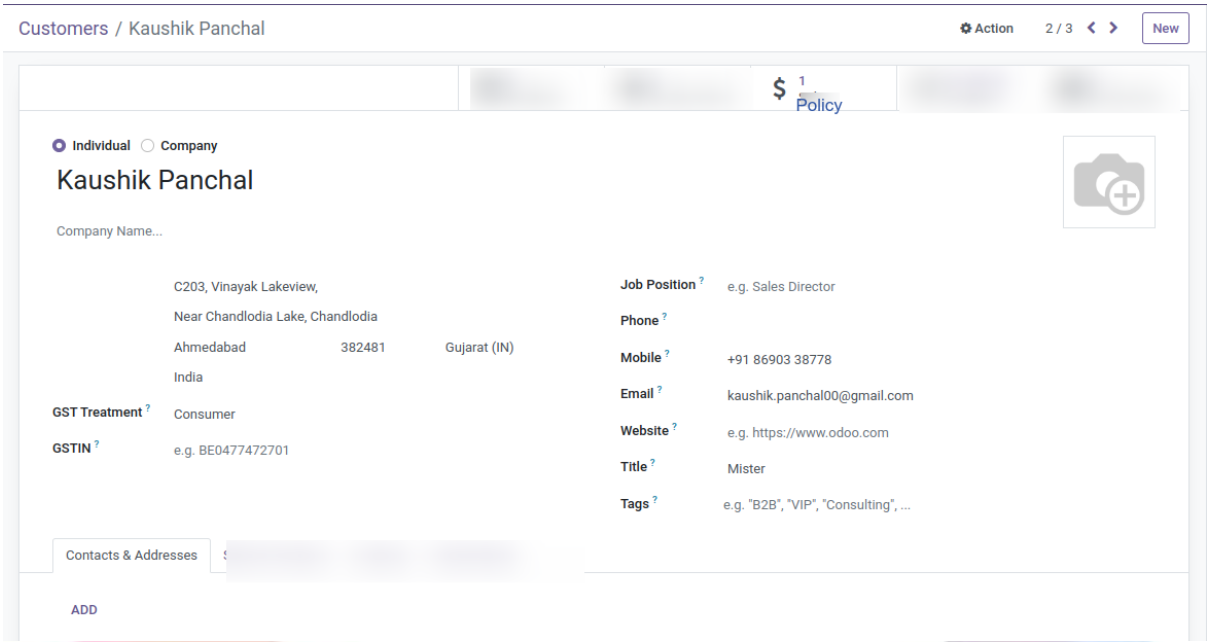
- **Company Name:** This is a text field where the user needs to enter the company name.
- **Address:** This section includes six fields:

- **Street:** This is a text field where the user needs to enter the company's street address.
- **Street 2:** This is an optional text field for entering additional address information, such as a suite or apartment number.
- **City:** This is a text field where the user needs to enter the company's city.
- **ZIP Code:** This is a text field where the user needs to enter the company's ZIP code.
- **State:** This is a text field where the user needs to enter the company's state.

Country: This is a text field where the user needs to enter the company's country.

- **Phone:** This is a text field where the user needs to enter the company's phone number.
- **Mobile:** This is a text field where the user needs to enter the company's mobile number.
- **GST Treatment:** This is a dropdown menu where the user can select "Yes" or "No" to indicate whether the company is registered for Goods and Services Tax (GST).
- **GSTIN:** This is a text field where the user can enter the company's GST Identification Number (GSTIN), if applicable.
- **Email:** This is a text field where the user can enter the company's email address.
- **Website:** This is a text field where the user can enter the company's website URL.

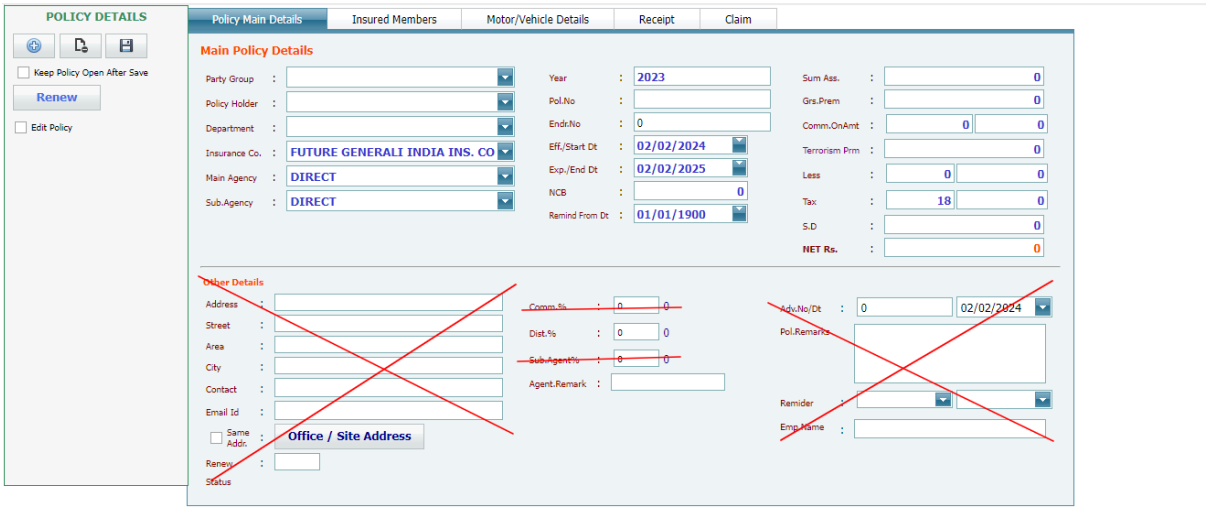
Customers



#	Name	Input Type	Relation	Required?	Comment
1	Company Type	Selection			
2	Name	Char			
3	Address	Char			
4	GST Treatment	Selection			
5	GSTIN	Char			
6	Phone	Char			
7	Mobile	Char			
8	Email	Char			
9	Website	Char			
10	Tags	M2m	res.partner.category		
11	Job Position	Char			
12	Title	M2o	res.partner.title		
13	Contacts & Addresses				

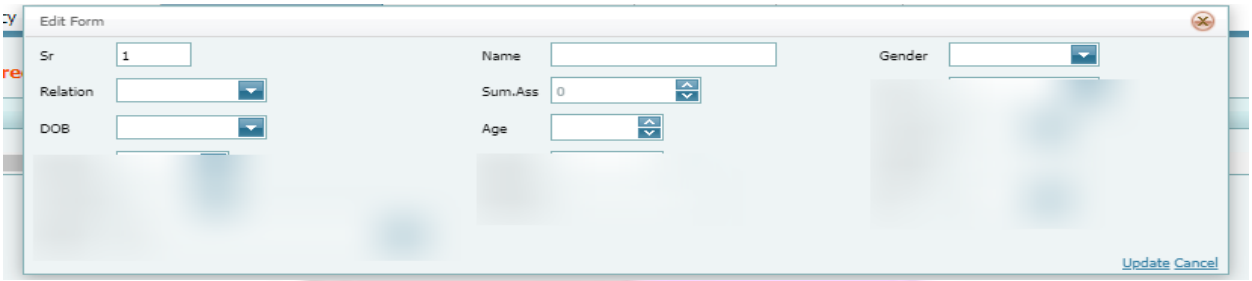
The customer master module is then established to store comprehensive customer data which will include customer name, purchased items, policy numbers, renewal dates, and other relevant information. The workflow initiates lead generation from insurance companies. Data from these leads may be organized into Excel format to aid in tracking and organization.

Product Master (policy)

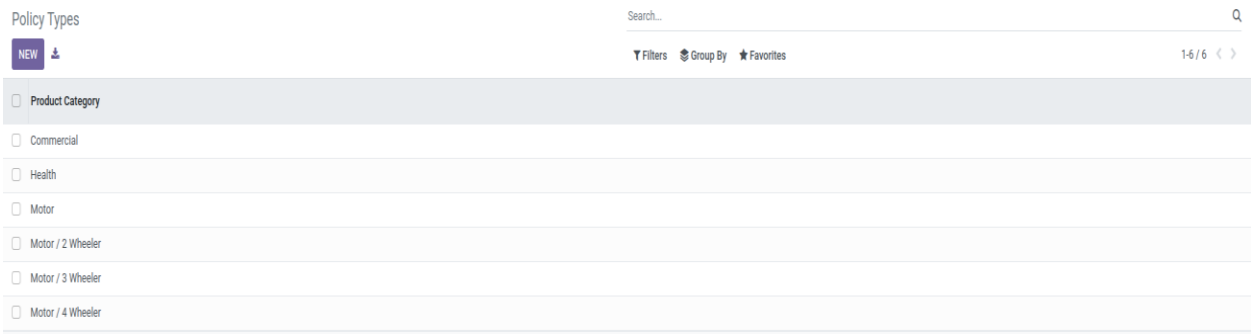


#	Name	Input Type	Relation	Required?	Comment
1	Party Group	Selection			
2	Policy Holder	Selection			
3	Department	Selection			
4	Insurance Company	Selection			
5	Main Agency	Selection			
6	Sub Agency	Selection			
7	Year	Number			
8	Policy No	Text			
9	Endr. No	Text			
10	Effective Start Date	Date			
11	Effective End Date	Date			
12	NCB	Number			

13	Remind From Date	Date			
14	Sum Assured	Number			
15	Gross Premium	Number			
16	Commission on Amount	Number			
17	Terrorism Prm	Number			
18	Less	Number			
19	Tax	Number			
20	S.D.	Number			
21	Net Rs.	Number			
Other Details					
22	Address	Text			To Remove
23	Street	Text			To Remove
24	Area	Text			To Remove
25	City	Text			To Remove
26	Contact	Number			To Remove
27	Email ID	Text			To Remove
28	Office Address	Text			To Remove
29	Renew Status	Text			To Remove
30	Commission %	Number			To Remove
31	Dist %	Number			
32	Sub Agent %	Number			To Remove
33	Agent Remark	Text			
34	Adv. No	Text			To Remove
35	Adv. Date	Date			To Remove
36	Policy Remark	Text			To Remove
37	Reminder	Date			To Remove
38	Emp. Name	Text			To Remove



#	Name	Input Type	Relation	Required?	Comment
1	Sr	Number			
2	Relation	Selection			
3	DOB	Date			
4	Blood Group	Selection			To Remove
5	Comm Rs	Number			To Remove
6	Delete	Selection			To Remove
7	Name	Text			
8	Sum Assured	Number			
9	Age	Number			To Remove
10	Height	Number			To Remove
11	Pan Card	Text			To Remove
12	Gender	Selection			
13	Prem	Number			To Remove
14	Comm %	Number			To Remove
15	Weight	Number			To Remove
16	CB	Text			To Remove

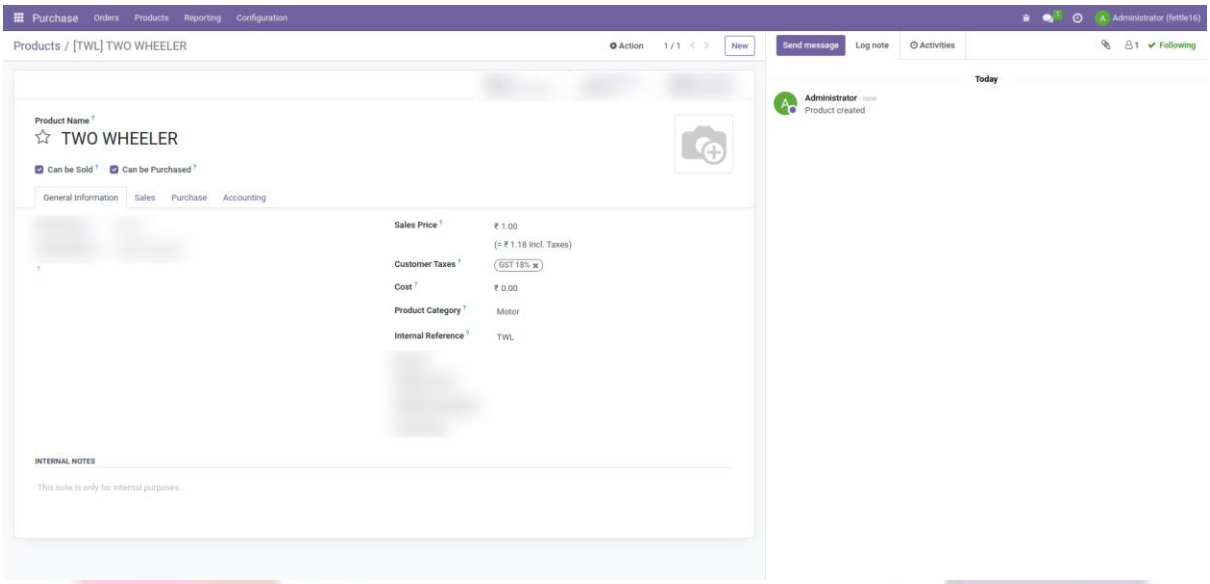


- **Product Name:** This text field is where you enter the unique and descriptive name for the insurance product.
- **Category:** This dropdown menu allows you to select the primary category for the product from "Motor," "Health," or "Commercial."
- **Sub-Category:** This dropdown menu provides options for further categorization within the chosen main category (e.g., "Motor - Two Wheeler").
- **Product Code:** This text field is where you assign a unique product code for internal identification and reference.

Product Details:

- **Description:** This provides a comprehensive description of the insurance product, outlining its coverage, benefits, exclusions, and other relevant details. You can format the text, add images, and tables for better readability.
- **Target Audience:** This text field is where you specify the intended customer segment for this product (e.g., individuals, families, businesses).
- **Sum Assured:** This numeric field allows you to define the maximum compensation amount payable under the insurance policy.
- **Premium:** This numeric field is where you indicate the premium amount to be paid by the policyholder, either as a fixed amount or based on specific criteria.
- **Policy Term:** This dropdown menu provides options for selecting the duration of the insurance coverage, such as 1 year, 3 years, or 5 years.
- **Renewal Options:** This text field allows you to describe the options available for policy renewal after the initial term.
- **Terms and Conditions:** This field likely provides a link to the full terms and conditions applicable to the insurance product. However, the specific functionality is not entirely clear from the image.

Product master (MOTOR)

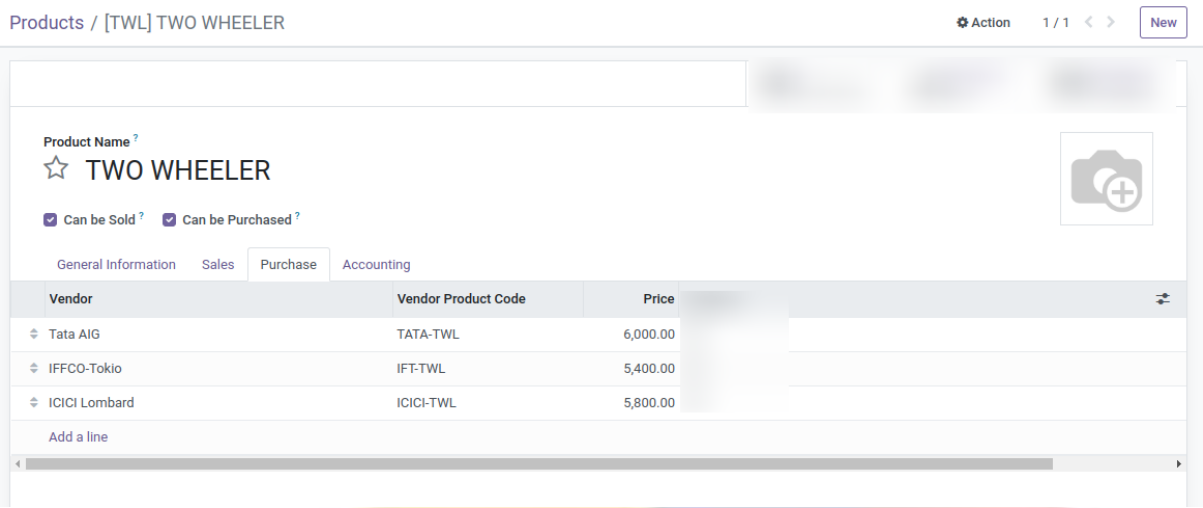


#	Name	Input Type	Relation	Required?	Comment
1	Product Name	Char			
2	Can be Sold	boolean			
3	Can be Purchased	boolean			
4	Sales Price	float			
5	Customer Taxes	M2m	account.tax		
6	Cost	float			
7	Product Category	M2o	Product.category		
8	Internal Reference	Char			
9	Internal Notes	html			

- **Product Name:** This field displays the name of the insurance product.
- **Product Code:** This field shows the unique code assigned to the product for internal identification.
- **Category:** This field indicates the primary category of the product, which is set as "Motor" in the image.
- **Sub-Category:** This field specifies the product's sub-category within the main category, which is "Two Wheeler" in the image.

- **Active:** This checkbox indicates whether the product is currently available for purchase. If checked, the product is active.
- **Sales Price:** This field displays the base price of the insurance product, likely excluding taxes.
- **Customer Taxes:** This field might show the applicable customer taxes or fees that would be added to the base price.
- **Cost:** This field potentially represents the internal cost associated with providing the insurance product.
- **Product Category:** This field likely refers to a broader product category classification within the Odoo system, which is "Motor" in the image.
- **Internal Reference:** This field might contain an internal code or reference number used for the product within Fettle Insurance's system.

Details:

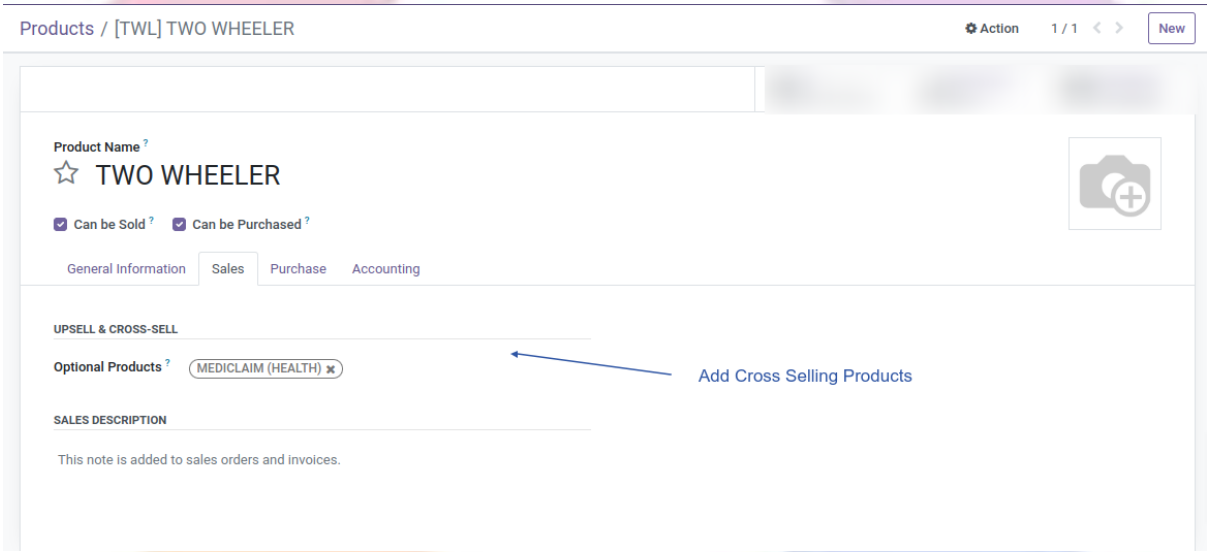


#	Name	Input Type	Relation	Required?	Comment
1	Vendor	M2o	res.partner		
2	Vendor Product Code	Char			
3	Price	float			

It shows information about three different vendors that sell a product called "Two Wheeler". The form includes the following information for each vendor:

- Vendor name
- Vendor product code
- Price

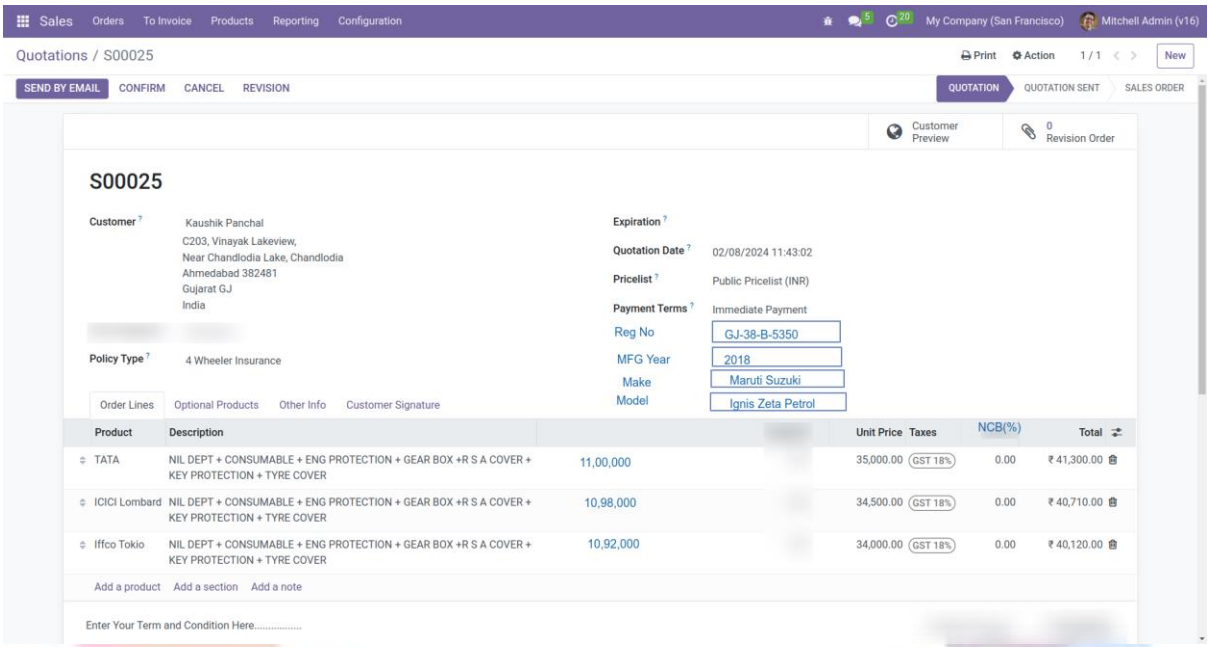
The form also has a button labeled "Add a line", which suggests that the user can add more vendors to the list.



The form includes the following fields:

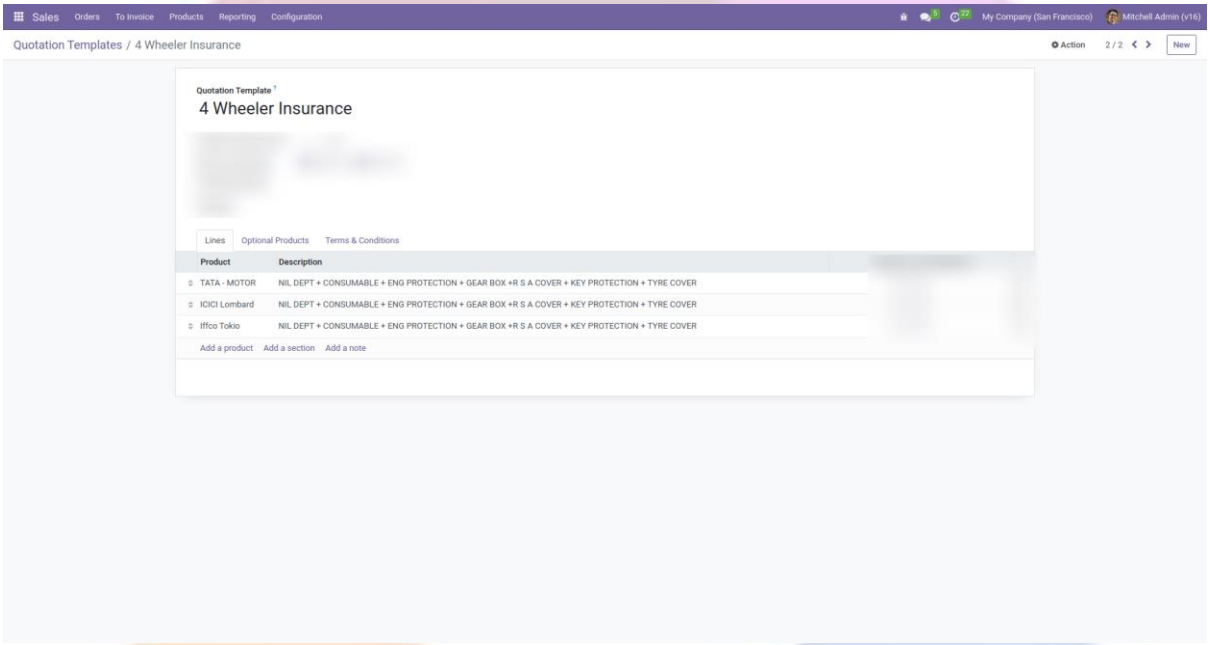
- **Product Name**: This field is pre-filled with the name of the product that the customer is currently viewing.
- **Can be sold**: This field is a checkbox that indicates whether the product can be sold.
- **Can be purchased:** This field is a checkbox that indicates whether the product can be purchased.
- **Optional Products:** This section allows users to search for and add other products that they would like to recommend to customers.
- **Sales Description:** This field allows users to enter a description of the product that will be displayed to customers on sales orders and invoices.
- **"Edit" icon:** This pencil icon allows you to edit the details of the selected product.

Sales Quotation:



#	Name	Input Type	Relation	Required?	Comment
1	Name	Char	fleet.vehicle.model		
2	Customer	M2o	res.partner		
3	Policy Type	M2o	sale.order.template		
4	Expiration	Date			
5	Quotation Date	Datetime			
6	Pricelist	M2o	product.pricelist		
7	Payment Terms	M2o	account.payment.term		
8	Reg Number	Char			
9	MFG Year	integer			
10	Make				
11	Model	Char			
12	Product	M2o	product.template		
13	Description	text			
14					

#	Name	Input Type	Relation	Required?	Comment
15	Unit Price	float			
16	Taxes	M2m	account.tax		
17	NCB(%)	float			
18	Total	monetary			



Here are all the details that needs to be filled in sales quotation.

- **Customer information:** The customer's name, address, and contact information.
- **Quotation details:** The quotation number, date, and expiration date.
- **Product information:** The products or services being quoted, along with the price, quantity, and taxes.
- **Terms and conditions:** The terms and conditions of the sale, such as payment terms and warranty information.

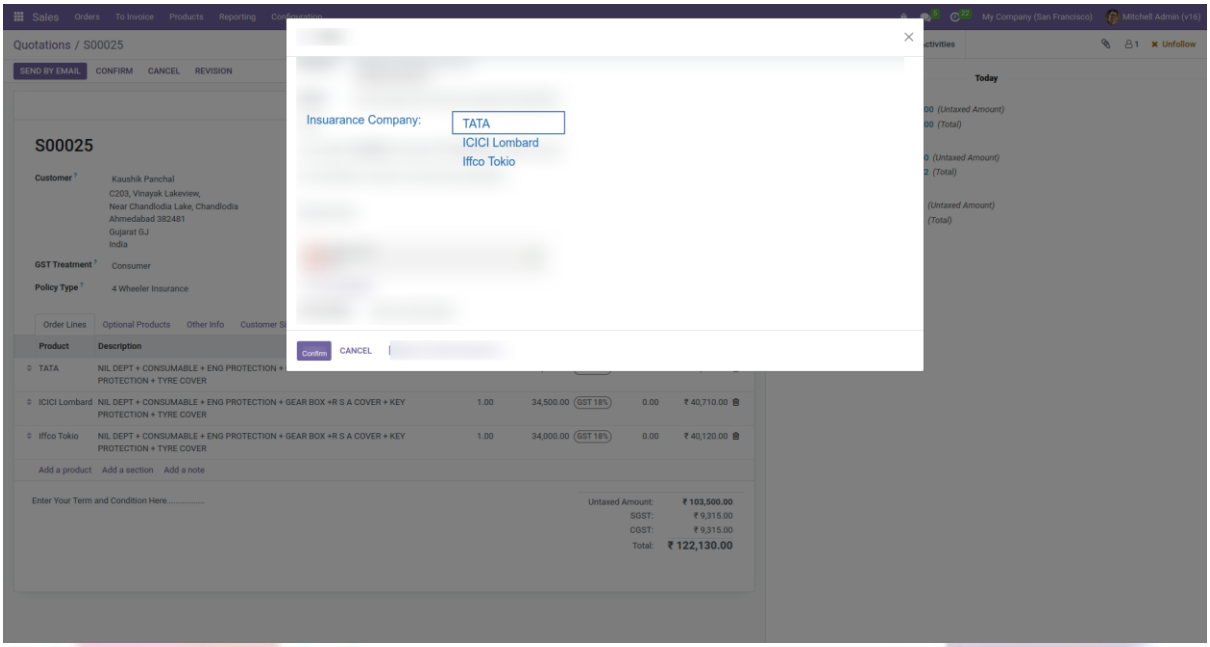
The form also includes buttons that allow the user to send the quotation by email, confirm the quotation, or cancel the quotation.

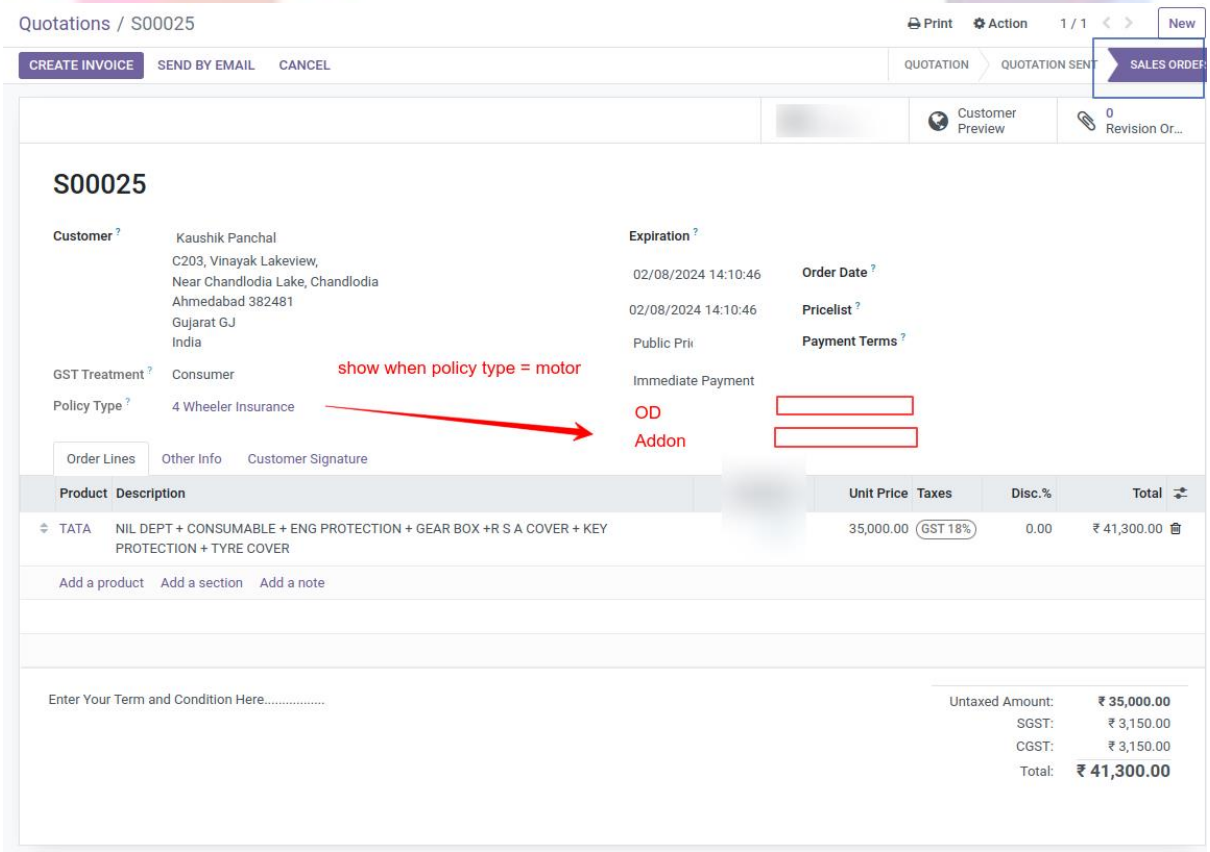
For Example:

- **Company:** Fettle Insurance (India)
- **Customer:** Kaushik Panchal

- **Quotation number:** S00025
- **Quotation date:** 02/08/2023
- **Expiration date:** 02/07/2028
- **Quoted products:**
    - TATA NIL DEPT CONSUMABLE ENG PROTECTION GEAR BOX+R SA COVER+ KEY PROTECTION TYRE COVER - ₹41,300.00
    - ICICI Lombard NIL DEPT CONSUMABLE ENG PROTECTION GEAR BOX RSA COVER+ KEY PROTECTION TYRE COVER - ₹40,710.00
    - IFFCO Tokio NIL DEPT CONSUMABLE ENG PROTECTION GEAR BOX +RSA COVER+ KEY PROTECTION + TYRE COVER - ₹40,120.00

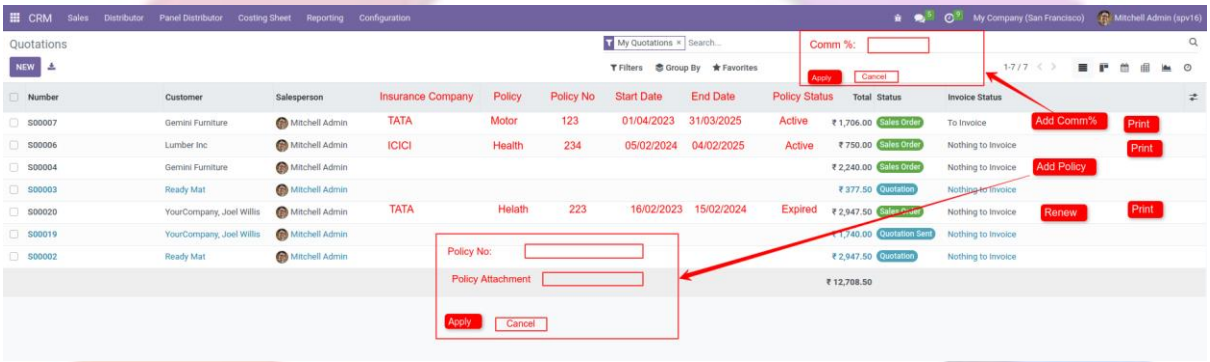
Sales Order:


Quotations / S00025
SEND BY EMAIL
CONFIRM
CANCEL
REVISION
S00025
Insuarance Company:
TATA
ICICI Lombard
Iffco Tokio
Confirm
CANCEL


Quotations / S00025
Print
Action
1 / 1
New
CREATE INVOICE
SEND BY EMAIL
CANCEL
QUOTATION
QUOTATION SENT
SALES ORDER
Customer Preview
0 Revision Or...
S00025
Customer
Kaushik Panchal
C203, Vinayak Lakeview,
Near Chandlodia Lake, Chandlodia
Ahmedabad 382481
Gujarat GJ
India
GST Treatment
Consumer
Policy Type
4 Wheeler Insurance
show when policy type = motor
Expiration
02/08/2024 14:10:46
Order Date
02/08/2024 14:10:46
Pricelist
Public Pri
Payment Terms
Immediate Payment
OD
Addon
Order Lines
Other Info
Customer Signature
Product
Description
Unit Price
Taxes
Disc.%
Total
TATA
NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX +R S A COVER + KEY PROTECTION + TYRE COVER
35,000.00
GST 18%
0.00
₹ 41,300.00
Add a product
Add a section
Add a note
Enter Your Term and Condition Here.....
Untaxed Amount:
₹ 35,000.00
SGST:
₹ 3,150.00
CGST:
₹ 3,150.00
Total:
₹ 41,300.00

Once the sales quotation is sent to the customers, they respond by selecting their preferred insurance policy from the options provided. Upon receiving the customer's choice, the sales quotation in Odoo is updated accordingly to reflect the selected policy. A sales order is then created in reference to the updated sales quotation number, establishing a formal agreement between the customer and Fettle India. The customer's payment confirmation, indicated by entering the policy number into the sales order, signifies the completion of the transaction. It will almost have the same fields as of sales quotation. In case of Motor type, it will also show fields of OD & Add on.

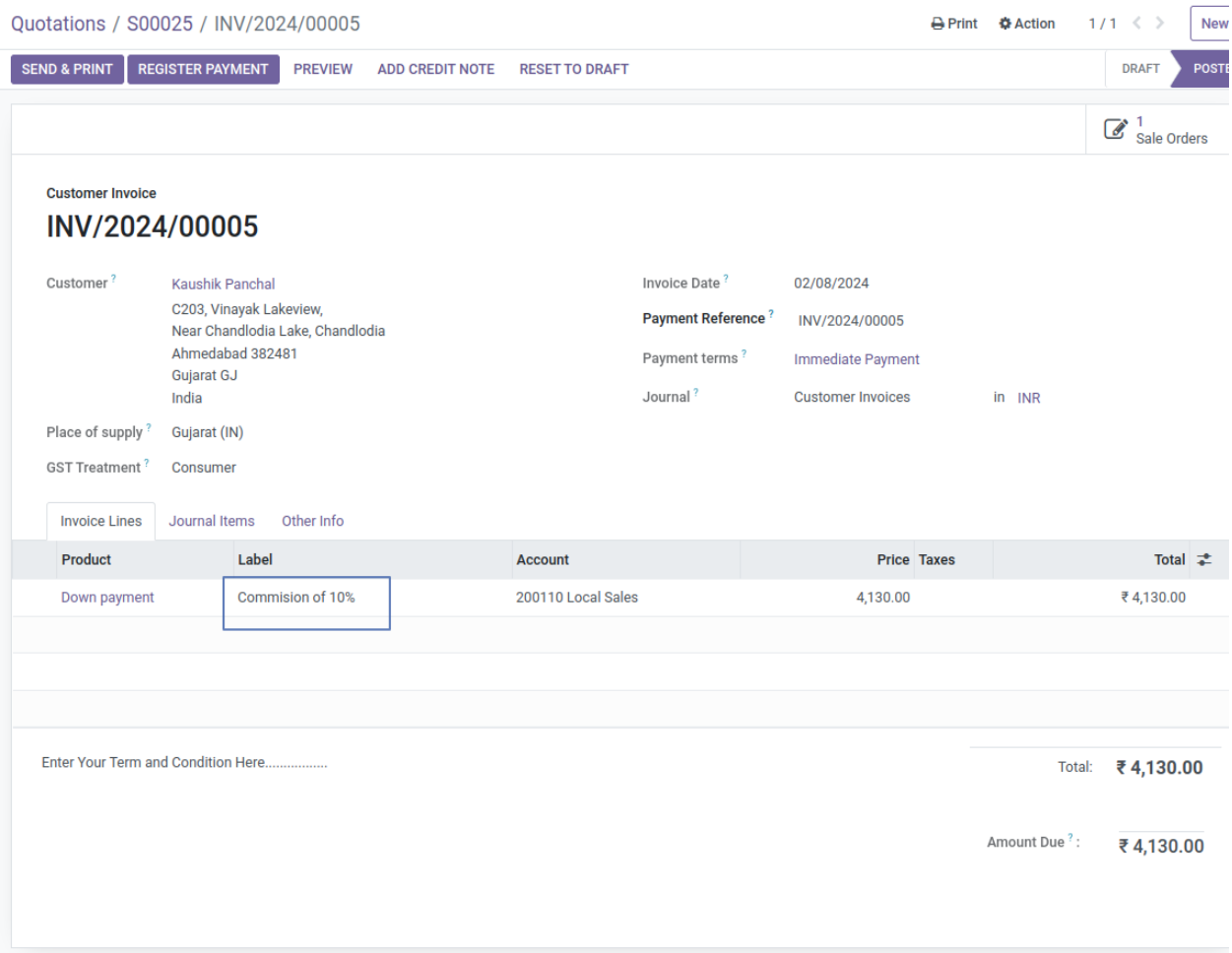
Commission Screen:



#	Name	Input Type	Relation	Required?	Comment
1	Name	Char			
2	Customer	M2o	res.partner		
3	Salesperson	M2o	res.users		
4	Insurance Company	M2o			
5	Policy				
6	Policy No	Char			
7	Start Date	Date			
8	End Date	Date			
9	Policy Status	selection			
10	Total	monetary			
11	Status	selection			
12	Invoice Status				

Each sales order has pre-assigned three owners: Chirag, Rushabh and Fettle India, ensuring accountability and shared responsibility. As the sales order progresses, the respective owner who initiated the sale will have the authority to input the margin percentage into the system, indicating closure of the sales order. Other owners will have “read-only” access. But in case of Fettle India, both owners (Chirag & Rushabh) will have the rights to give input of the margin percentage. There will be Add Commission button at the end of each row as shown above. Once you click on it, a pop up screen will show fields like policy no. and policy attachments with apply and cancel buttons to make any changes.

Commission Invoice:



Commissionable Amount Formula:

- Health and Commercial Insurance
    - **Commissionable Amount** = Premium - GST Taxes
- Motor
    - **Commissionable Amount** = Premium - GST Taxes + OD + Addon

#	Name	Input Type	Relation	Required?	Comment
1	Customer Invoice	Char			
2	Customer	M2o	res.partner		
3	Place of supply	M2o	res.country.state		
4	GST Treatment	selection			
5	Invoice Date	Date			
6	Payment Reference	Char			
7	Payment terms	M2o	account.payment.term		
8	Journal	M2o	account.journal		
9	Due Date	Date			
10	Currency	res.currency			
11	Product	product.product			
12	Label	Char			
13	Quantity	float			
14	Price	float			
15	Taxes	M2m	account.tax		
16	Total	monetary			
17	Total	monetary			
18	Amount Due	monetary			

Once the sales order (SO) is closed, a commission invoice will be generated referencing the SO number automatically. The invoice includes customer details, SO reference number, company name, and policy number. The total amount of the invoice will be based solely on the margin percentage. For example, if the customer's insurance purchase amounts to 30,000 rupees and the owner's margin is set at 10%, the service invoice will be generated for 3,000 rupees only.

In this screen, following details will be captured.

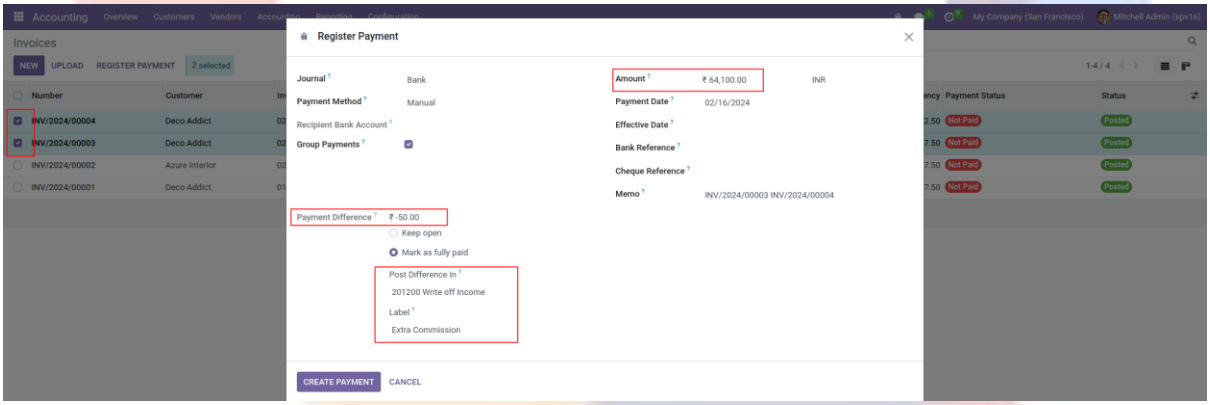
- **Customer information:** The customer's name, address, and contact information.
- **Invoice details:** The invoice number, date, and due date.
- **Invoice line items:** A description of the policies, the price, and the total amount.
- **Invoice total:** The total amount of the invoice, including taxes.

The invoice also includes buttons that allow the user to send and print the invoice, register payment, preview the invoice, add a credit note, reset the invoice to draft, or post the invoice.

For Example:

- **Customer:** Kaushik Panchal
- **Invoice number:** INV/2024/00005
- **Invoice date:** 02/08/2024
- **Due date:** Immediate Payment
- **Invoice line item:**
    - Down payment - Commission of 10% - ₹4,130.00
- **Invoice total:** ₹4,130.00

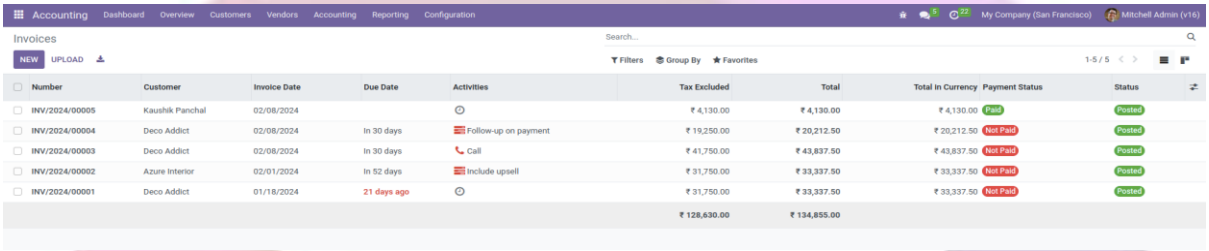
Register Payment:



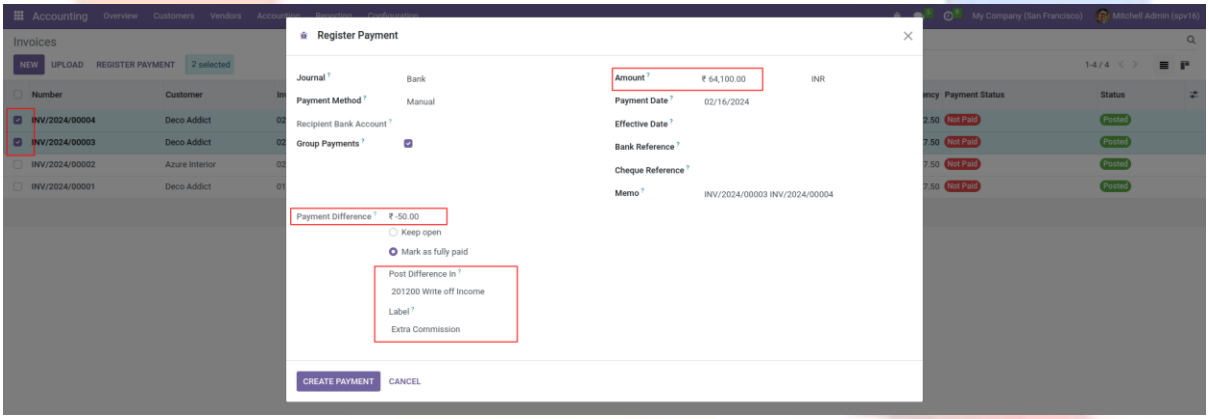
#	Name	Input Type	Relation	Required?	Comment
1	Journal	M2o	account.journal		
2	Payment Method	M2o	account.payment.method.line		
3	Recipient Bank Account	M2o	res.partner.bank		
4	Group Payments	boolean			

5	Payment Difference	monetary			
6	Amount	monetary			
7	Payment Date	Date			
8	Memo	Char			

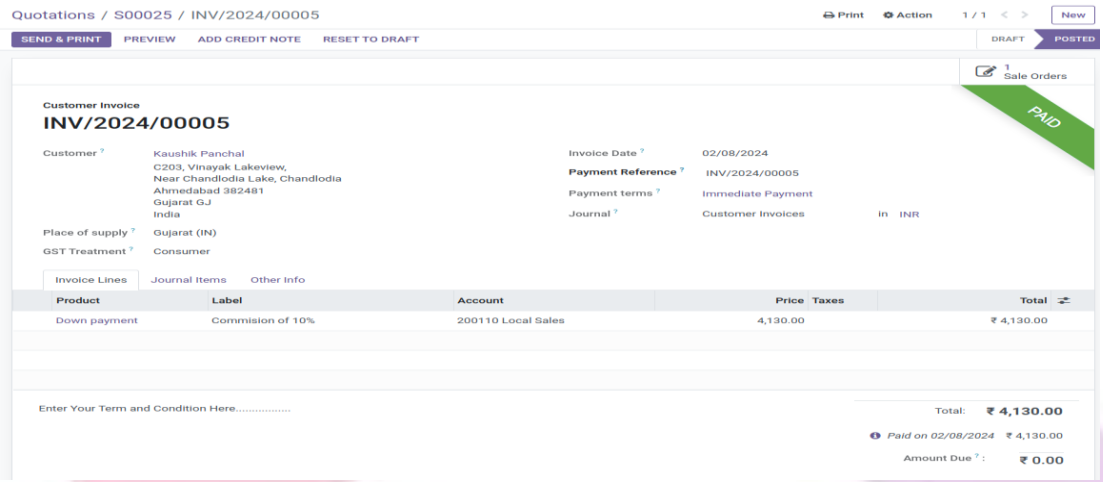
Commission Invoices with Payment Status:



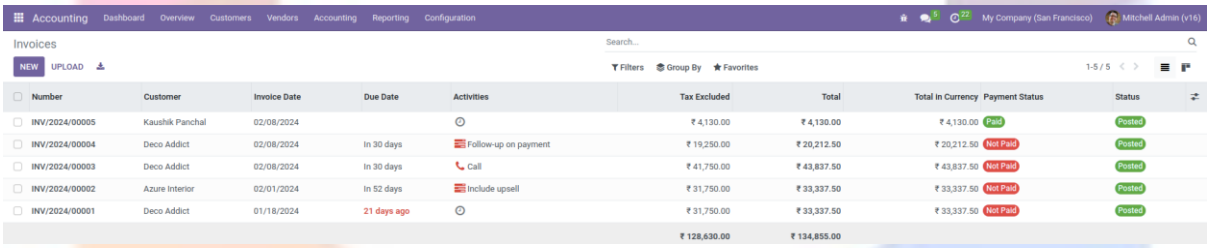
You can efficiently settle multiple invoices at once, and if you have additional funds from the company, you can leverage them to negotiate advantageous discounts.



Payment receipt:

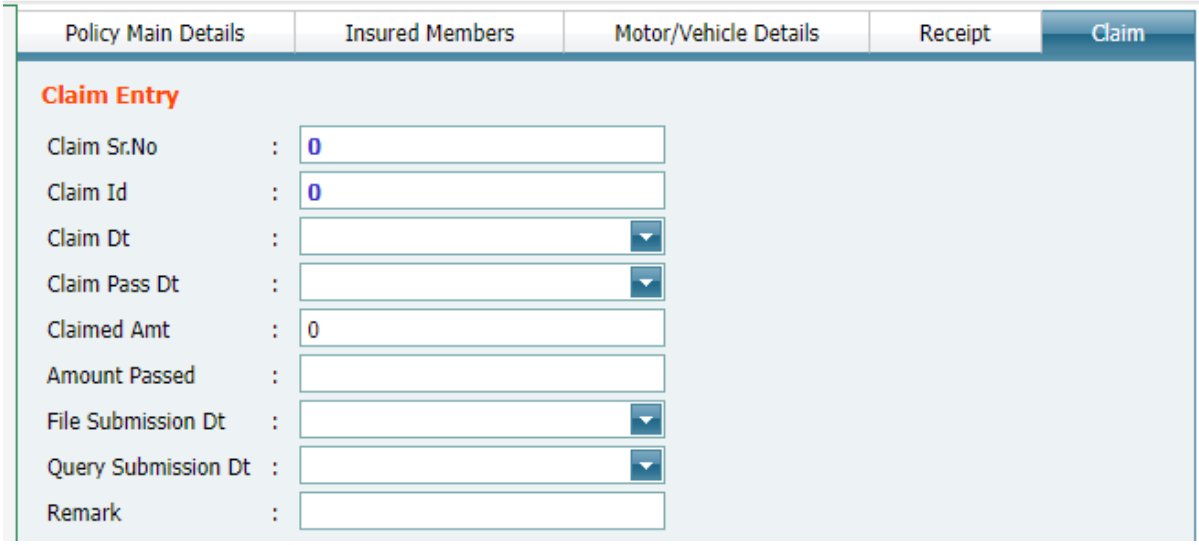


Commission Invoices with Payment Status:



Things to be implemented

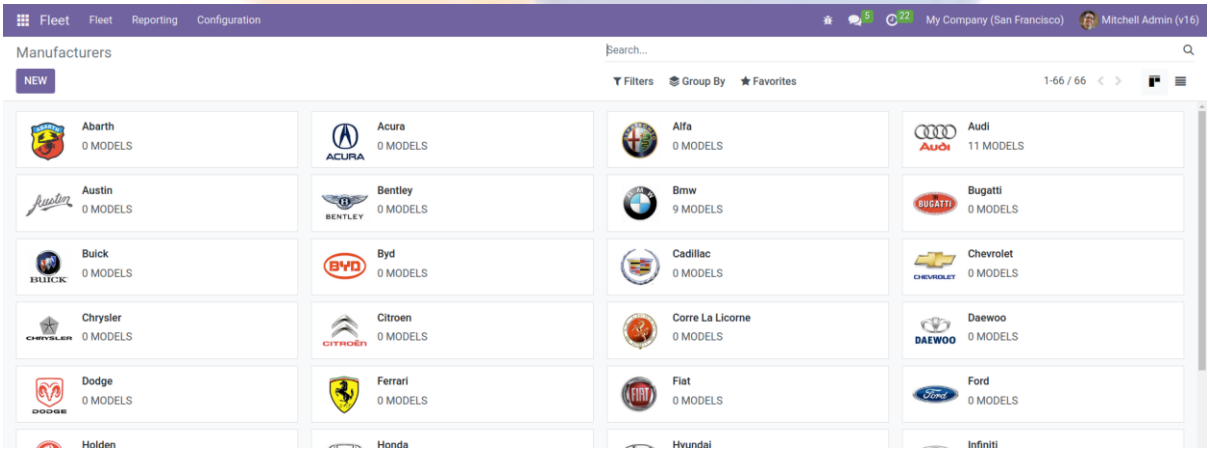
Claim (to-claim)



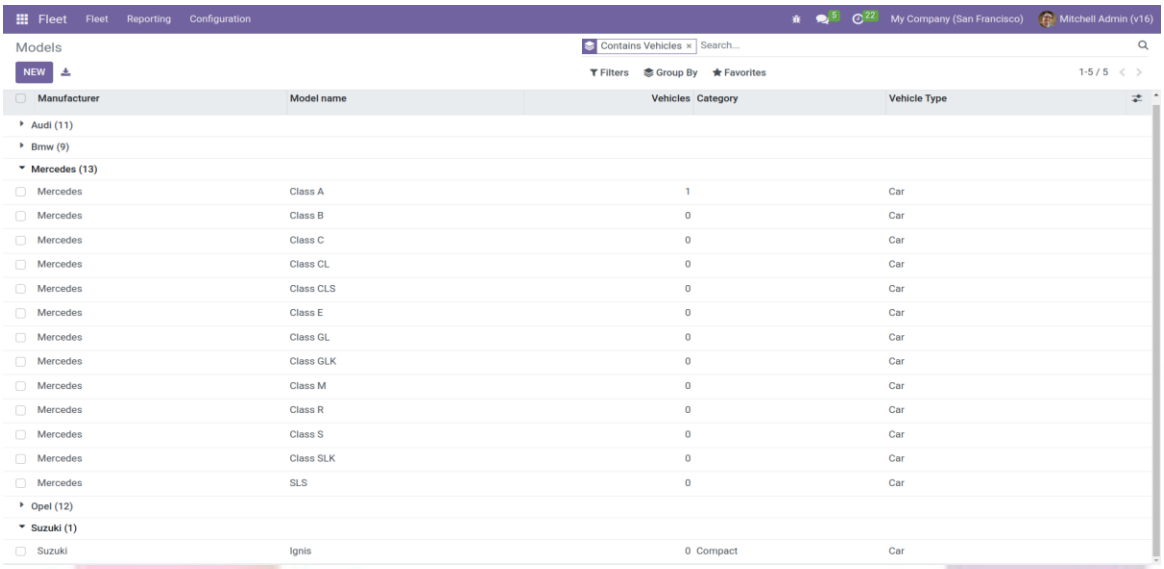
#	Name	Input Type	Relation	Required?	Comment
1	Claim Sr No	Text			
2	Claim ID	Text			
3	Claim Date	Date			
4	Claim Pass Date	Date			
5	Claim Amount	Number			
6	Amount Passed	Number			
7	File Submission Date	Date			
8	Query Submission Date	Date			
9	Remark	Text			

- **Details of Claims**
  - Claim form have details for customer, policy and description of issues
  - We can attach documents for it
  - We can priority for claiming
  - System will generate unique number for claim request
  - System will track all progress of stages
  - We can add Scheduled activities here

Manufacturer

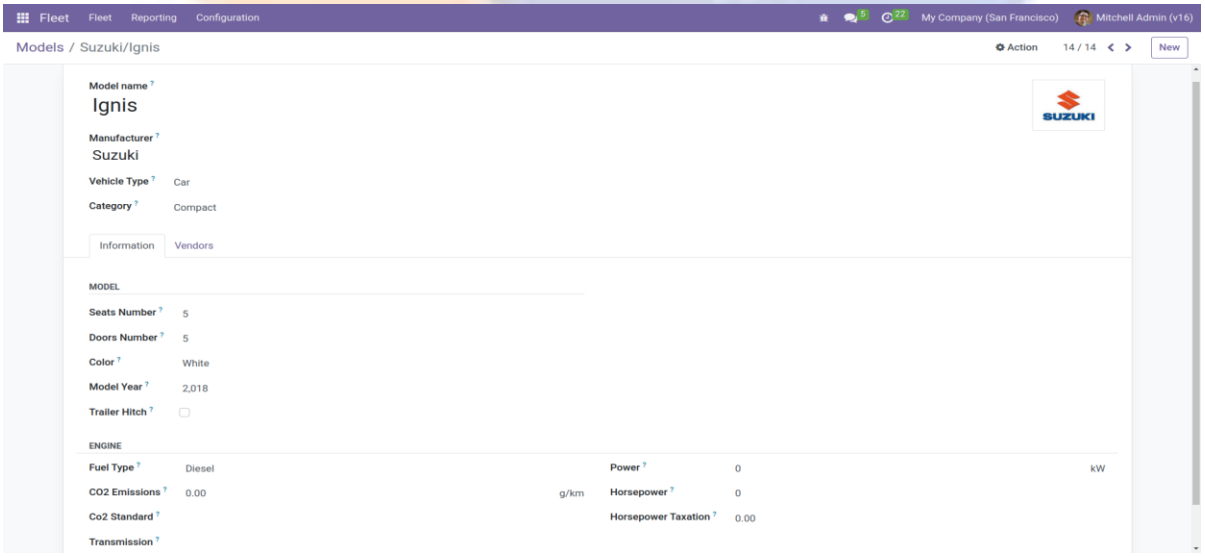


Model Lists



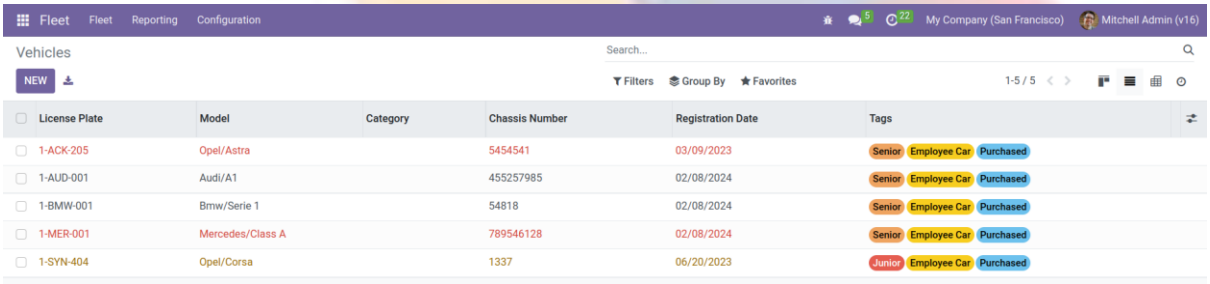
#	Name	Input Type	Relation	Required?	Comment
1	Manufacturer	M2o	fleet.vehicle.model.brand		
2	Model Name	Char			
3	Vehicles	integer			
4	Category	M2o	fleet.vehicle.model.category		
5	Vehicle Type	selection			

Details of model



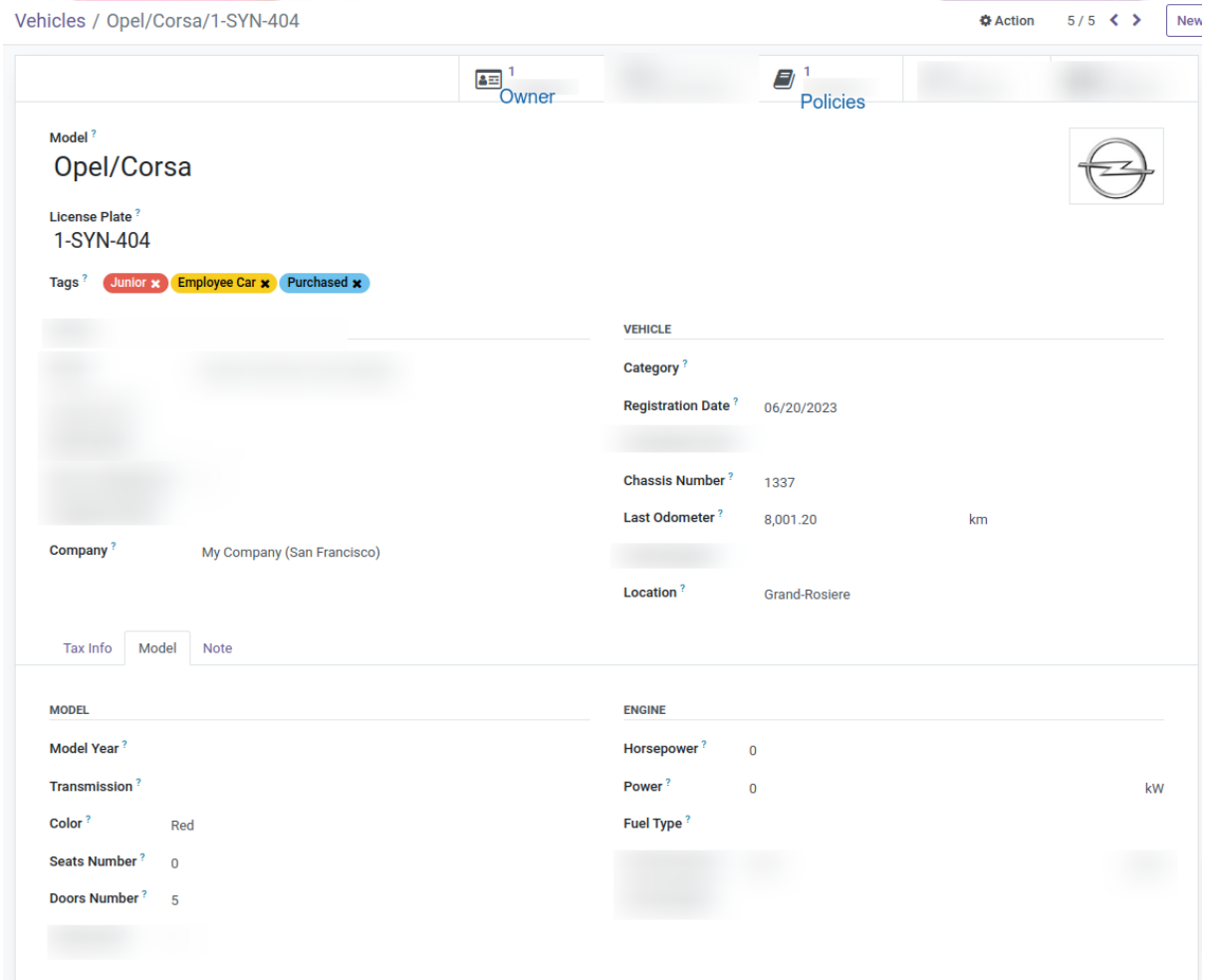
#	Name	Input Type	Relation	Required?	Comment
1	Model name	Char			
2	Manufacturer	M2o	fleet.vehicle.model.brand		
3	Vehicle Type	selection			
4	Category	M2o	fleet.vehicle.model.category		
5	Seats Number	integer			
6	Doors Number	integer			
7	Color	Char			
8	Model Year	integer			
9	Trailer Hitch	boolean			
11	Fuel Type	selection			
12	CO2 Emissions	float			
13	Co2 Standard	Char			
14	Transmission	selection			
15	Power	integer			
16	Horsepower	integer			
17	Horsepower Taxation	float			

List of vehicles



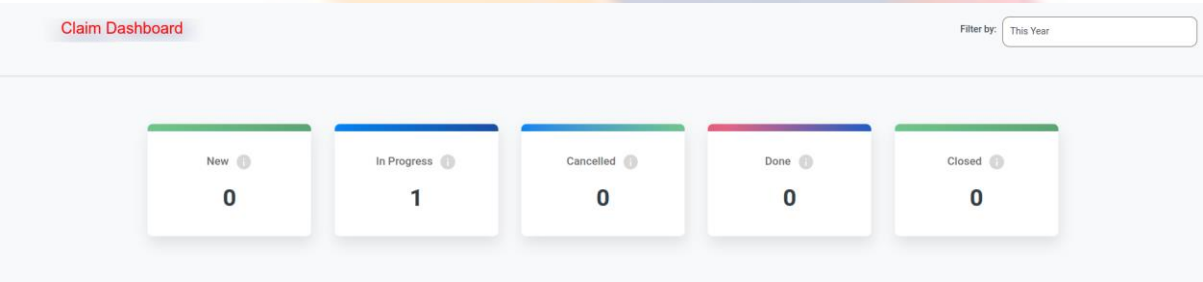
#	Name	Input Type	Relation	Required?	Comment
1	License Plate	Char			
2	Model	M2o	fleet.vehicle.model		
3	Category	M2o	fleet.vehicle.model.category		
4	Driver	M2o	res.partner		
5	Future Driver	M2o	res.partner		
6	Registration Date	Date			
7	Tags	M2m	fleet.vehicle.tag		

Vehicle Details



#	Name	Input Type	Relation	Required?	Comment
1	Model	M2o	fleet.vehicle.model		
2	License Plate	Char			
3	Tags	M2m	fleet.vehicle.tag		
4	Company	M2o	res.company		
5	Category	M2o	fleet.vehicle.model.category		
6	Registration Date	Date			
7	Chassis Number	Char			
8	Last Odometer	Float			
9	Location	Char			
10	Model Year	Char			
11	Transmission	selection			
12	Color	Char			
13	Seats Number	integer			
14	Doors Number	integer			
15	Horsepower	integer			
16	Power	integer			
17	Fuel Type	selection			

Claim Dashboard



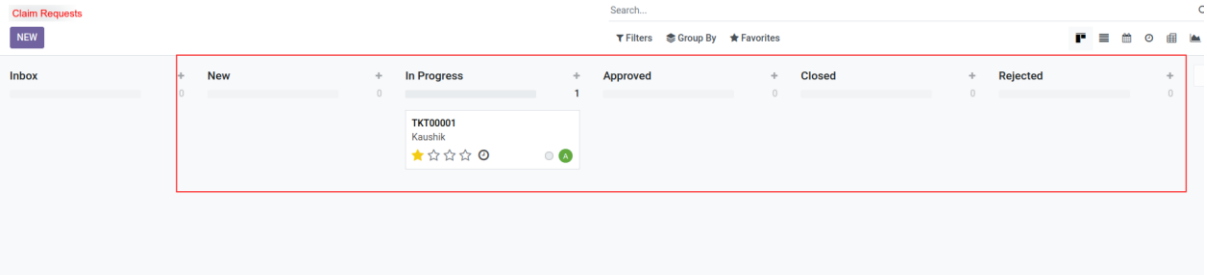
This ‘Claim’ screen has a filter at the top that allows users to select a specific year.

Below the filter, there is a table that shows the number of claims in different statuses.

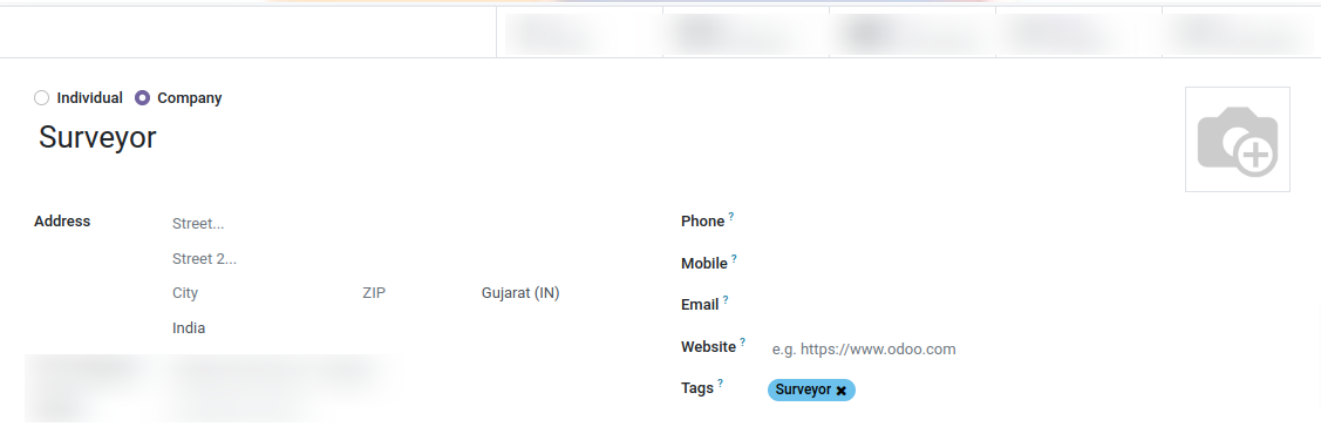
The statuses are:

- New
- In Progress
- Cancelled
- Done
- Closed

Claim Requests by Stages:

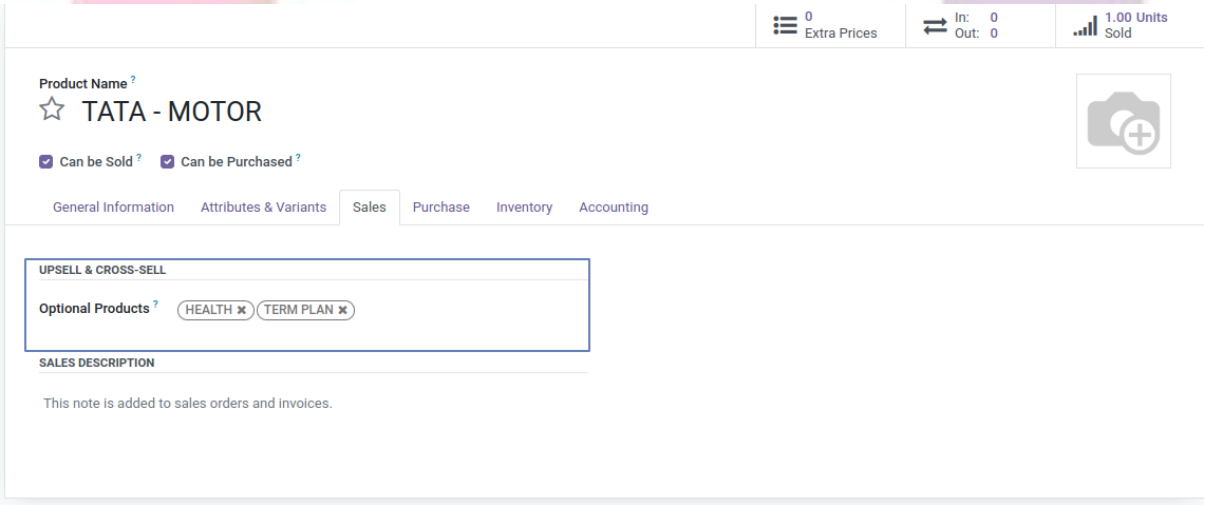


TPA/ Surveyor



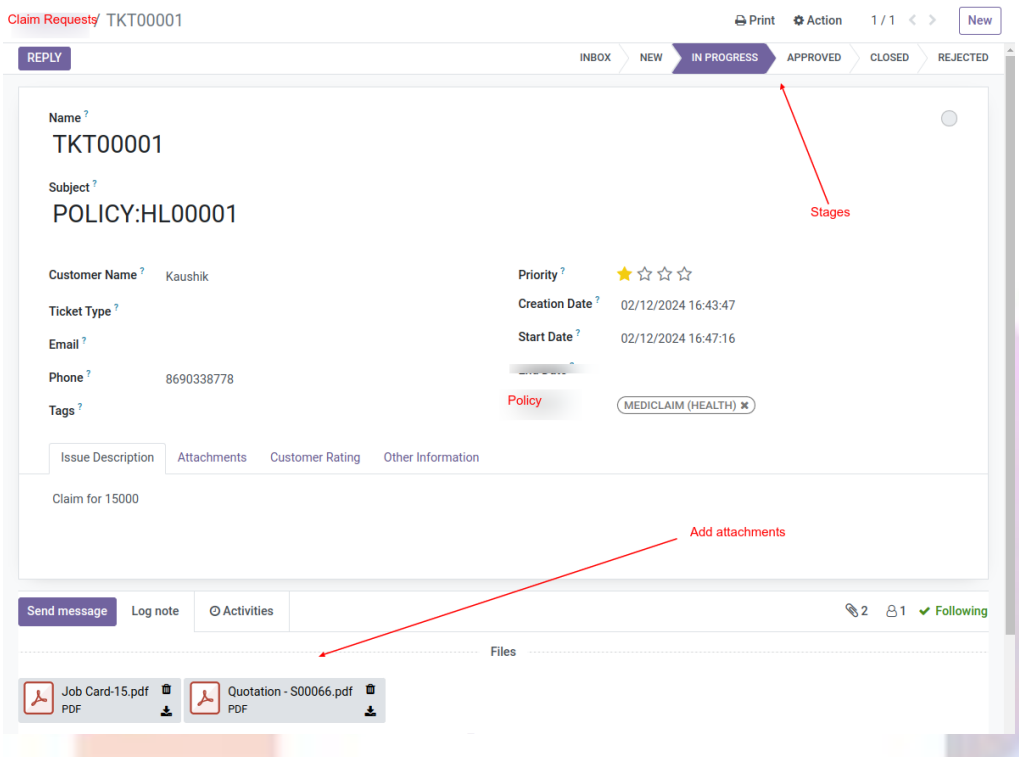
#	Name	Input Type	Relation	Required?	Comment
1	Company Type	Selection			
2	Name	Char			
3	Address	Char			
4	Phone	Char			
5	Mobile	Char			
6	Email	Char			
7	Website	Char			
8	Tags	M2m	res.partner.category		

Suggested Policies on Policy



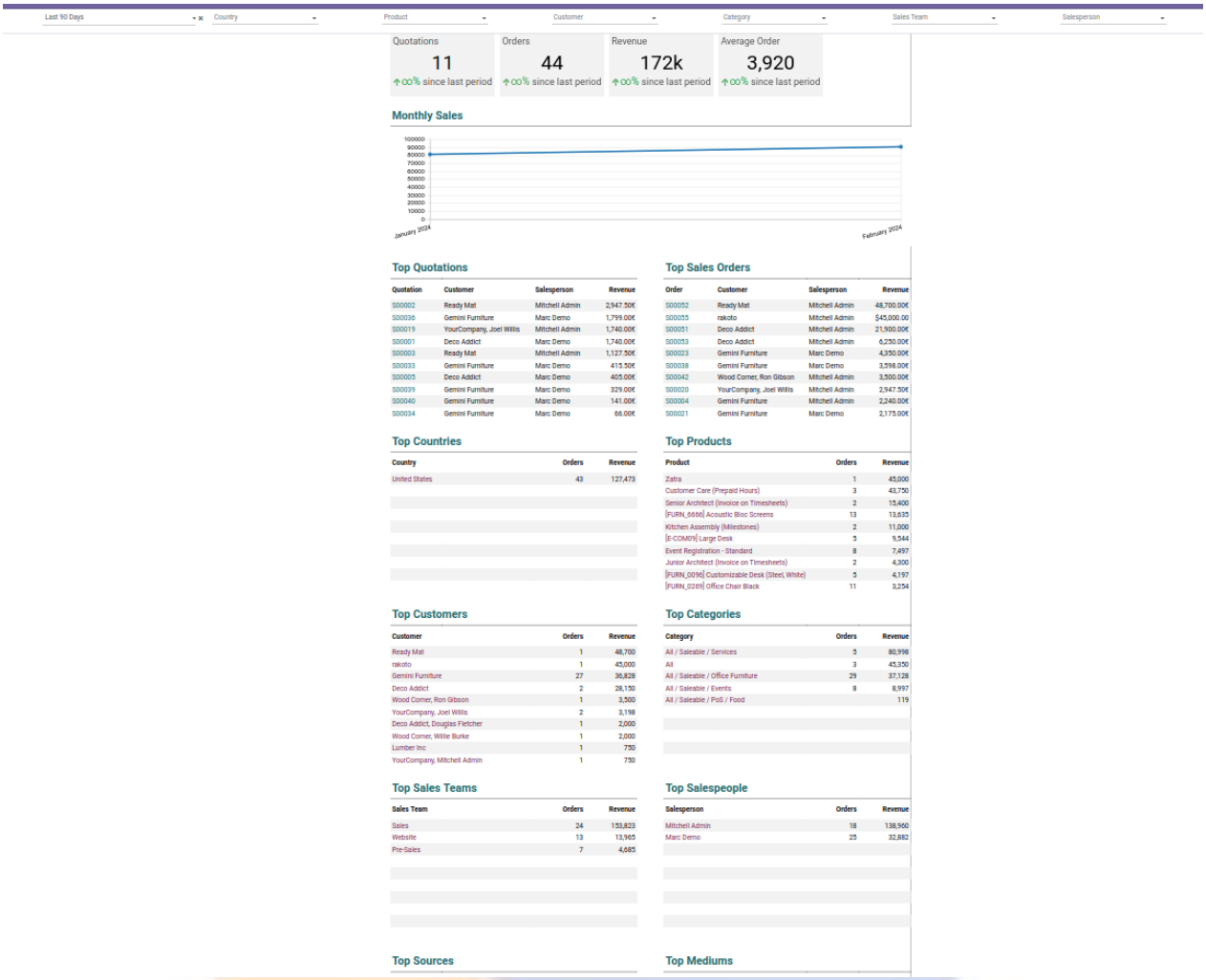
#	Name	Input Type	Relation	Required?	Comment
1	Product Name	Char			
2	Can be Sold	boolean			
3	Can be Purchased	boolean			
4	Optional Products	M2m	product.template		
5	Sales Description	text			

Claim Requests:



#	Name	Input Type	Relation	Required?	Comment
1	Name	Char			
2	Subject	Char			
3	Customer Name	M2o	res.partner		
4	Ticket Type	M2o	helpdesk.types		
5	Email	Char			
6	Phone	Char			
7	Tags	M2m	helpdesk.tag		
8	Priority	selection			
9	Creation Date	Datetime			
10	Start Date	Datetime			
11	End Date	Datetime			
12	Product	M2m	product.template		
13	Issue Description	Text			
14	Attach Files				

Dashboards for sales policy



Overall Performance:

- Quotations: Total number of quotations generated.
- Orders: Total number of orders placed.
- Revenue: Total revenue generated from sales.
- Average Order Value: Average amount spent per order.

Top Performers:

- Top Quotations: A list of quotations with the highest potential value.
- Top Sales Orders: A list of orders with the highest order value.
- Top Countries: Countries contributing the most revenue.

- Top Products: Products generating the highest sales.
- Top Customers: Customers contributing the most revenue.
- Top Sales Teams: Sales teams with the highest performance.
- Top Salespeople: Individual salespeople with the highest sales figures.
- Top Sources: Sources generating the most leads.
- Top Mediums: Marketing mediums driving the most sales.

Dashboard by Policy

This dashboard will show graph of the best sellers by revenue and units of various products sold over the last 30 days. We have also provided with prominent filters such as Duration, Products, and Category.