



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 | |

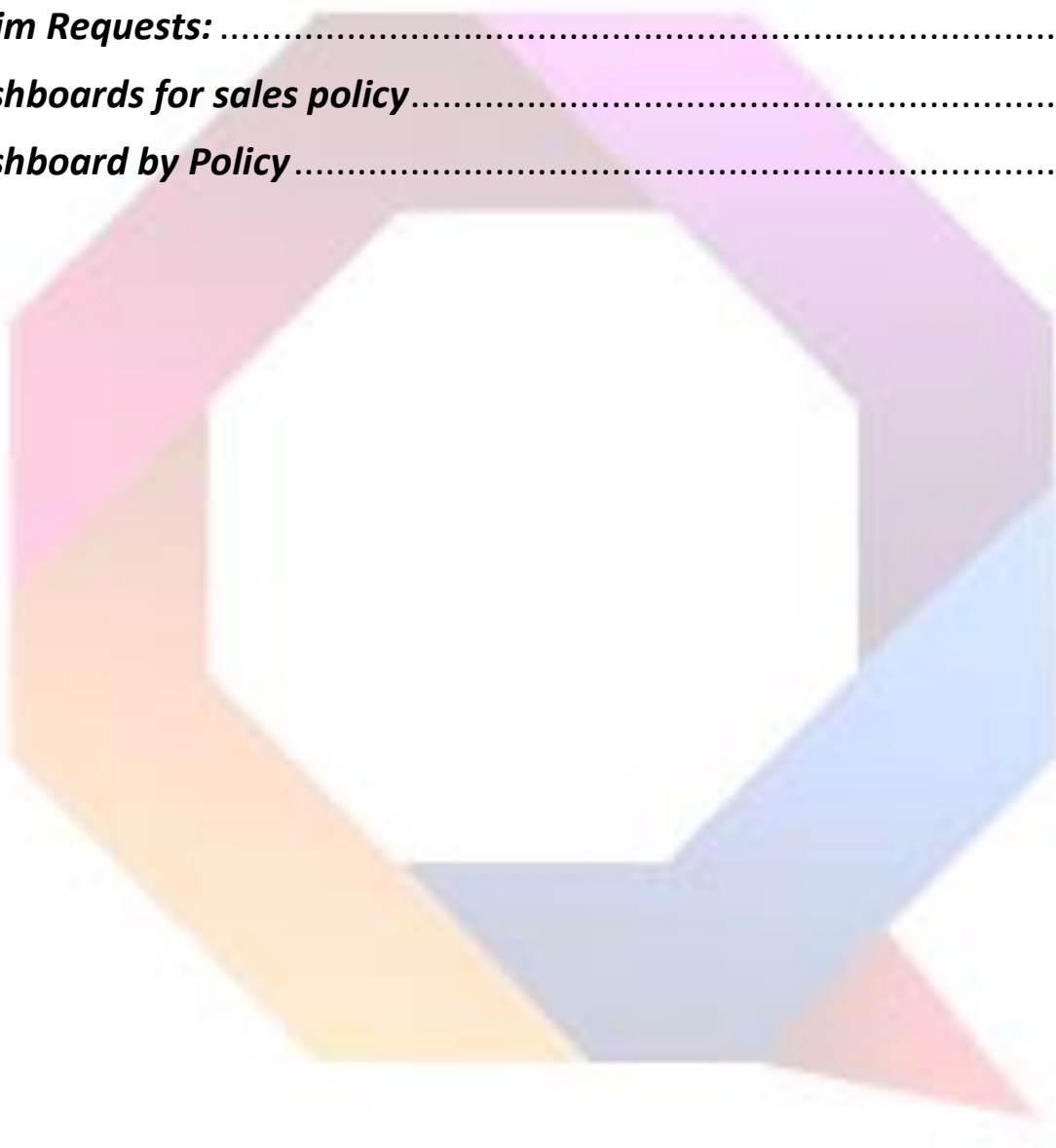
Customer Team / Process Owner:

| Area | Department | Name |
|------------------------|--------------------------|--------------------------------------|
| Director | Head | Mr. Rishabhbbhai 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 |

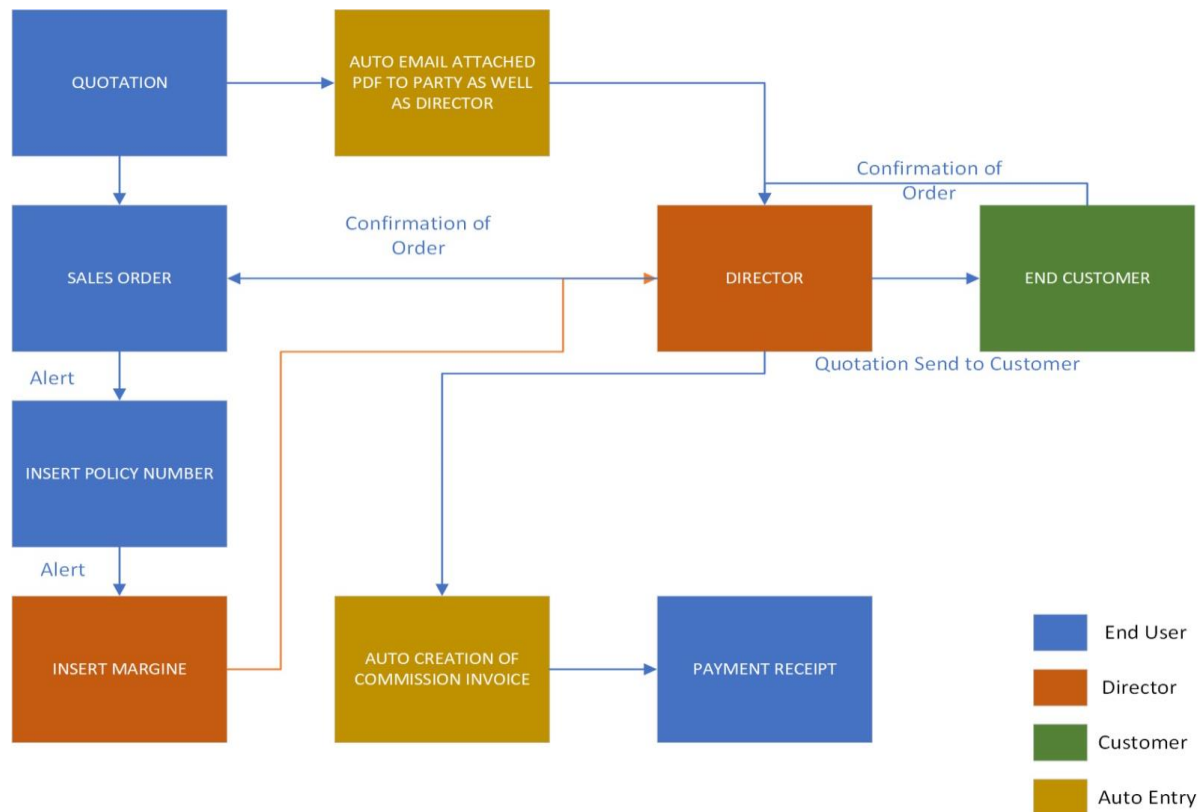
Table of Contents

| | |
|---|----|
| 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 |

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



Drafting:




Company

Companies / Fettle Insurance

Print Action 3 / 3 < > New

Company Name ?
Fettle Insurance




General Information

Contact ?
Fettle Insurance

Address ?
250 Executive Park Blvd, Suite 3400
Street 2...
Ahmedabad Gujarat (IN) 94134
India

Tax ID ?
Company ID ?
Currency ?
INR
UPI Id ?

Phone ?
Mobile ?
+(91) 9876543210
Email ?
information@gmail.com
Website ?
http://fettle.co.in
Parent Company ?
Company Favicon ?



| # | 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:

Agencies / RISHABH ZAVERI Action 1 / 1 < > New

\$ 0 Policies

₹ 0.00 Commissions

☐ Individual ☒ Company

RISHABH ZAVERI

Address

Street...

Street 2...

Ahmedabad ZIP Gujarat (IN)

India

Phone?

Mobile? +91 88998 89988

Email?

Website? e.g. https://www.odoo.com

Tags? e.g. "B2B", "VIP", "Consulting", ...

| # | 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

/ Bajaj Allianz General Insurance Co Action 1 / 1 < > New

\$ 0 Policies

☐ Individual ☒ Company

Bajaj Allianz General Insurance Co

Address

Street...
Street 2...
City ZIP State
Country

Phone ?
Mobile ?
Email ?
Website ? http://bajajallianz.com
Tags ? Insurance Company x

GST Treatment ?
GSTIN ? e.g. BE0477472701

Contacts & Addresses Sales & Purchase Invoicing Internal Notes

ADD

| # | 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

Customers / Kaushik Panchal Action 2 / 3 < > New

\$ 1 Policy

☒ Individual ☐ Company

Kaushik Panchal

Company Name...

C203, Vinayak Lakeview,
Near Chandlodia Lake, Chandlodia
Ahmedabad 382481 Gujarat (IN)
India

Job Position ? e.g. Sales Director

Phone ?

Mobile ? +91 86903 38778

Email ? kaushik.panchal00@gmail.com

Website ? e.g. https://www.odoo.com

Title ? Mister

Tags ? e.g. "B2B", "VIP", "Consulting", ...

GST Treatment ? Consumer

GSTIN ? e.g. BE0477472701

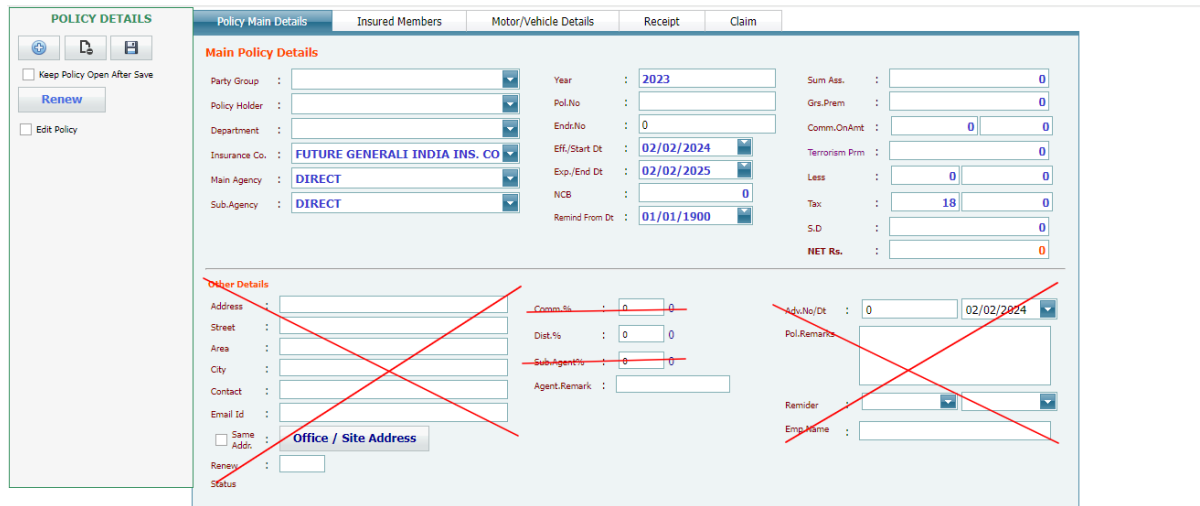
Contacts & Addresses

ADD

| # | 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 |

The screenshot shows an 'Edit Form' window in Odoo. It contains several input fields: 'Sr' (text input with value '1'), 'Relation' (dropdown menu), 'DOB' (date picker), 'Name' (text input), 'Sum.Ass' (text input with value '0'), 'Age' (text input), and 'Gender' (dropdown menu). At the bottom right, there are 'Update' and 'Cancel' buttons.

| # | 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 |

Policy Types

NEW

Search...

Filters Group By Favorites

1-6/6

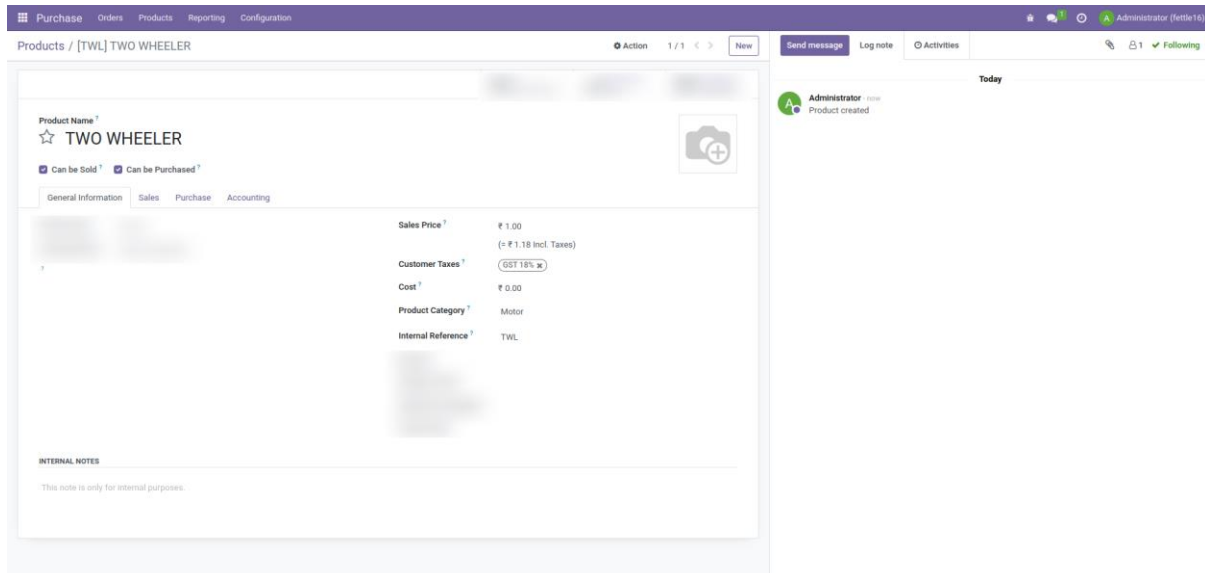
| | |
|--------------------------|-------------------|
| <input type="checkbox"/> | Product Category |
| <input type="checkbox"/> | Commercial |
| <input type="checkbox"/> | Health |
| <input type="checkbox"/> | Motor |
| <input type="checkbox"/> | Motor / 2 Wheeler |
| <input type="checkbox"/> | Motor / 3 Wheeler |
| <input type="checkbox"/> | Motor / 4 Wheeler |

- **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)



The screenshot shows the Odoo Product master form for a product named 'TWO WHEELER'. The form is divided into several sections: General Information, Sales, Purchase, and Accounting. The General Information section is active, showing fields for Product Name, Can be Sold, Can be Purchased, Sales Price, Customer Taxes, Cost, Product Category, Internal Reference, and Internal Notes. The Sales Price is set to ₹ 1.00, Customer Taxes to GST 18%, Cost to ₹ 0.00, Product Category to Motor, and Internal Reference to TWL. The Internal Notes section is currently empty.

| # | 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:

Products / [TWL] TWO WHEELER Action 1 / 1 < > New

Product Name ?
☆ TWO WHEELER

☒ Can be Sold ? ☒ Can be Purchased ?

General Information Sales Purchase Accounting

| Vendor | Vendor Product Code | Price |
|-----------------|---------------------|----------|
| ⚙ Tata AIG | TATA-TWL | 6,000.00 |
| ⚙ IFICO-Tokio | IFT-TWL | 5,400.00 |
| ⚙ ICICI Lombard | ICICI-TWL | 5,800.00 |

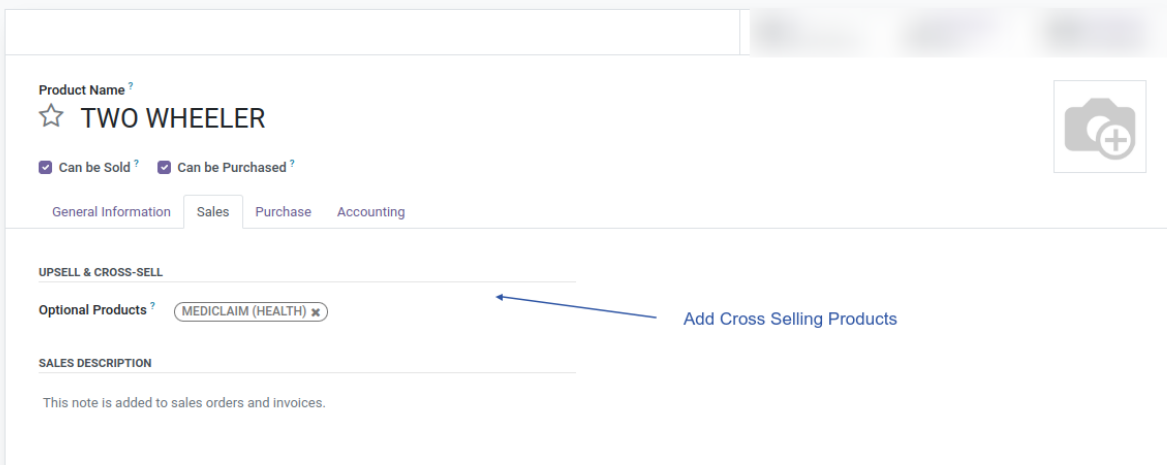
Add a line

| # | 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 screenshot shows the Odoo Product form for 'TWO WHEELER'. The breadcrumb trail at the top reads 'Products / [TWL] TWO WHEELER'. The form header includes a star icon, the product name 'TWO WHEELER', and a camera icon with a plus sign. Below the header, there are two checkboxes: 'Can be Sold' (checked) and 'Can be Purchased' (checked). The form is divided into four tabs: 'General Information', 'Sales', 'Purchase', and 'Accounting'. The 'UPSELL & CROSS-SELL' section is visible, showing 'Optional Products' with a search bar containing 'MEDICLAIM (HEALTH)'. A blue arrow points from the text 'Add Cross Selling Products' to the search bar. The 'SALES DESCRIPTION' section is also visible, with a note stating 'This note is added to sales orders and invoices.'

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:

Quotations / S00025

SEND BY EMAIL CONFIRM CANCEL REVISION

Print Action 1 / 1 New

Customer Preview 0 Revision Order

S00025

Customer ? Kaushik Panchal
C203, Vinayak Lakeview,
Near Chandiodia Lake, Chandiodia
Ahmedabad 382481
Gujarat G.J
India

Expiration ?

Quotation Date ? 02/08/2024 11:43:02

Pricelist ? Public Pricelist (INR)

Payment Terms ? Immediate Payment

Reg No GJ-38-B-5350

MFG Year 2018

Make Maruti Suzuki

Model Ignis Zeta Petrol

Policy Type ? 4 Wheeler Insurance

Order Lines Optional Products Other Info Customer Signature

| Product | Description | Unit Price | Taxes | NCB(%) | Total |
|---------------|---|------------|---------------------|--------|-------------|
| TATA | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 11,00,000 | 35,000.00 (GST 18%) | 0.00 | ₹ 41,300.00 |
| ICICI Lombard | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 10,98,000 | 34,500.00 (GST 18%) | 0.00 | ₹ 40,710.00 |
| Iffco Tokio | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 10,92,000 | 34,000.00 (GST 18%) | 0.00 | ₹ 40,120.00 |

Add a product Add a section Add a note

Enter Your Term and Condition Here.....

| # | 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

Customer ? Kaushik Panchal
C203, Vinayak Lakeview,
Near Chandlodia Lake, Chandlodia
Ahmedabad 382481
Gujarat GJ
India

GST Treatment ? Consumer

Policy Type ? 4 Wheeler Insurance

Order Lines Optional Products Other Info Customer Signature

Product Description

| Product | Description | Unit | Price | Taxes | Disc.% | Total |
|---------------|---|------|-----------|-----------|--------|-------------|
| TATA | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 1.00 | 34,500.00 | (GST 18%) | 0.00 | ₹ 40,710.00 |
| ICICI Lombard | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 1.00 | 34,000.00 | (GST 18%) | 0.00 | ₹ 40,120.00 |
| Iffco Tokio | NIL DEPT + CONSUMABLE + ENG PROTECTION + GEAR BOX + R S A COVER + KEY PROTECTION + TYRE COVER | 1.00 | 34,000.00 | (GST 18%) | 0.00 | ₹ 40,120.00 |

Enter Your Term and Condition Here.....

Untaxed Amount: ₹ 103,500.00
SGST: ₹ 5,315.00
CGST: ₹ 5,315.00
Total: ₹ 122,130.00

Insurance 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

S00025

Customer ? Kaushik Panchal
C203, Vinayak Lakeview,
Near Chandlodia Lake, Chandlodia
Ahmedabad 382481
Gujarat GJ
India

Expiration ? 02/08/2024 14:10:46

Order Date ? 02/08/2024 14:10:46

Pricelist ? Public Prii

Payment Terms ? Immediate Payment

GST Treatment ? Consumer

Policy Type ? 4 Wheeler Insurance

show when policy type = motor

OD

Addon

Order Lines Other Info Customer Signature

Product Description

| 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:

The screenshot shows the Odoo Quotations interface. At the top, there's a navigation bar with 'CRM', 'Sales', 'Distributor', 'Panel Distributor', 'Costing Sheet', 'Reporting', and 'Configuration'. Below this is a search bar for 'My Quotations' and a 'NEW' button. The main table lists quotations with columns: Number, Customer, Salesperson, Insurance Company, Policy, Policy No, Start Date, End Date, Policy Status, Total, Status, and Invoice Status. A modal is open for adding commission, with fields for 'Policy No' and 'Policy Attachment'. Red arrows point from the 'Add Comm%' button in the table to the modal and from the 'Add Policy' button to the 'Policy No' field.

| Number | Customer | Salesperson | Insurance Company | Policy | Policy No | Start Date | End Date | Policy Status | Total | Status | Invoice Status |
|--------|--------------------------|----------------|-------------------|--------|-----------|------------|------------|---------------|-------------|----------------|--------------------|
| S00007 | Gemini Furniture | Mitchell Admin | TATA | Motor | 123 | 01/04/2023 | 31/03/2025 | Active | ₹ 1,706.00 | Sales Order | To Invoice |
| S00006 | Lumber Inc | Mitchell Admin | ICICI | Health | 234 | 05/02/2024 | 04/02/2025 | Active | ₹ 750.00 | Sales Order | Nothing to Invoice |
| S00004 | Gemini Furniture | Mitchell Admin | | | | | | | ₹ 2,240.00 | Sales Order | Nothing to Invoice |
| S00003 | Ready Mat | Mitchell Admin | | | | | | | ₹ 377.50 | Quotation | Nothing to Invoice |
| S00020 | YourCompany, Joel Willis | Mitchell Admin | TATA | Health | 223 | 16/02/2023 | 15/02/2024 | Expired | ₹ 2,947.50 | Quotation | Nothing to Invoice |
| S00019 | YourCompany, Joel Willis | Mitchell Admin | | | | | | | ₹ 1,740.00 | Quotation Sent | Nothing to Invoice |
| S00002 | Ready Mat | Mitchell Admin | | | | | | | ₹ 2,947.50 | Quotation | Nothing to Invoice |
| | | | | | | | | | ₹ 12,708.50 | | |

| # | 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:

Quotations / S00025 / INV/2024/00005 Print Action 1 / 1 < > New

[SEND & PRINT](#) [REGISTER PAYMENT](#) [PREVIEW](#) [ADD CREDIT NOTE](#) [RESET TO DRAFT](#) [DRAFT](#) [POST](#)

1 Sale Orders

Customer Invoice
INV/2024/00005

| | | | |
|--------------------------|---|----------------------------|--------------------------|
| Customer ? | Kaushik Panchal C203, Vinayak Lakeview, Near Chandlodia Lake, Chandlodia Ahmedabad 382481 Gujarat GJ India | Invoice Date ? | 02/08/2024 |
| | | Payment Reference ? | INV/2024/00005 |
| | | Payment terms ? | Immediate Payment |
| | | Journal ? | Customer Invoices in INR |
| Place of supply ? | Gujarat (IN) | | |
| GST Treatment ? | Consumer | | |

[Invoice Lines](#) [Journal Items](#) [Other Info](#)

| Product | Label | Account | Price Taxes | Total |
|--------------|-------------------|--------------------|-------------|------------|
| Down payment | Commission of 10% | 200110 Local Sales | 4,130.00 | ₹ 4,130.00 |

Enter Your Term and Condition Here.....

Total: **₹ 4,130.00**

Amount Due ? : **₹ 4,130.00**

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:

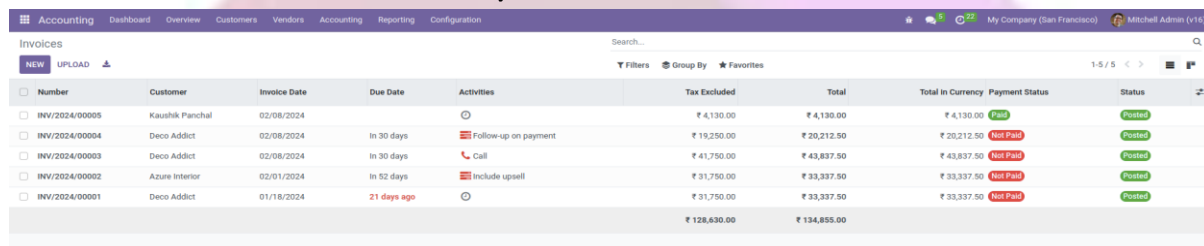
- **Customer:** Kaushik Panchal
- **Invoice number:** INV/2024/00005
- **Invoice date:** 02/08/2024
- **Due date:** Immediate Payment
- **Invoice line item:**
 - Down payment - Commission of 10% - ₹4,130.00
- **Invoice total:** ₹4,130.00

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 | | | |

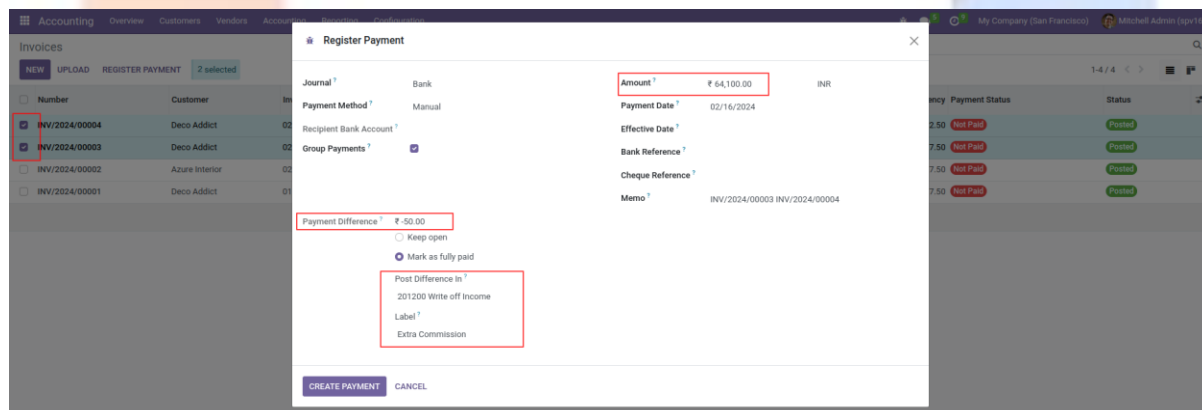
Commission Invoices with Payment Status:



The screenshot shows the 'Invoices' list in Odoo. The table has columns: Number, Customer, Invoice Date, Due Date, Activities, Tax Excluded, Total, Total in Currency, Payment Status, and Status. Two invoices are highlighted with red boxes: INV/2024/00004 (Deco Addict, ₹ 19,250.00) and INV/2024/00003 (Deco Addict, ₹ 43,837.50). Both have a 'Not Paid' status.

| Number | Customer | Invoice Date | Due Date | Activities | Tax Excluded | Total | Total in Currency | Payment Status | Status |
|----------------|-----------------|--------------|-------------|----------------------|--------------|--------------|-------------------|----------------|--------|
| INV/2024/00005 | Kaushik Panchal | 02/08/2024 | | | ₹ 4,130.00 | ₹ 4,130.00 | ₹ 4,130.00 | Not Paid | Posted |
| INV/2024/00004 | Deco Addict | 02/08/2024 | In 30 days | Follow-up on payment | ₹ 19,250.00 | ₹ 20,212.50 | ₹ 20,212.50 | Not Paid | Posted |
| INV/2024/00003 | Deco Addict | 02/08/2024 | In 30 days | Call | ₹ 41,750.00 | ₹ 43,837.50 | ₹ 43,837.50 | Not Paid | Posted |
| INV/2024/00002 | Azure Interior | 02/01/2024 | In 52 days | Include upwell | ₹ 31,750.00 | ₹ 33,337.50 | ₹ 33,337.50 | Not Paid | Posted |
| INV/2024/00001 | Deco Addict | 01/18/2024 | 21 days ago | | ₹ 31,750.00 | ₹ 33,337.50 | ₹ 33,337.50 | Not Paid | Posted |
| | | | | | ₹ 128,630.00 | ₹ 134,855.00 | | | |

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.



The screenshot shows the 'Register Payment' dialog in Odoo. The 'Amount' field is set to ₹ 64,100.00. The 'Payment Date' is 02/16/2024. The 'Effective Date' is 02/16/2024. The 'Bank Reference' is INV/2024/00003 INV/2024/00004. The 'Payment Difference' is ₹ -50.00. The 'Post Difference In' field is set to '201200 Write off Income'. The 'Label' is 'Extra Commission'. The 'CREATE PAYMENT' button is highlighted.

| Journal | Bank | Amount | Payment Date | Effective Date | Bank Reference | Cheque Reference | Memo |
|---------|------|-------------|--------------|----------------|----------------|------------------|-------------------------------|
| | | ₹ 64,100.00 | 02/16/2024 | 02/16/2024 | | | INV/2024/00003 INV/2024/00004 |

Payment Difference: ₹ -50.00
☐ Keep open
☒ Mark as fully paid
 Post Difference In: 201200 Write off Income
 Label: Extra Commission

CREATE PAYMENT CANCEL

Payment receipt:

Quotations / S00025 / INV/2024/00005

SEND & PRINT PREVIEW ADD CREDIT NOTE RESET TO DRAFT

Print Action 1 / 1 < > New

DRAFT POSTED

1 Sale Orders

Customer Invoice
INV/2024/00005

Customer ? Kaushik Panchal
C203, Vinayak Lakeview,
Near Chandlodia Lake, Chandlodia
Ahmedabad 382481
Gujarat G.J
India

Invoice Date ? 02/08/2024

Payment Reference ? INV/2024/00005

Payment terms ? Immediate Payment

Journal ? Customer Invoices in INR

Place of supply ? Gujarat (IN)

GST Treatment ? Consumer

Invoice Lines Journal Items Other Info

| Product | Label | Account | Price Taxes | Total |
|--------------|-------------------|--------------------|-------------|------------|
| Down payment | Commission of 10% | 200110 Local Sales | 4,130.00 | ₹ 4,130.00 |

Enter Your Term and Condition Here.....

Total: ₹ 4,130.00

Paid on 02/08/2024 ₹ 4,130.00

Amount Due ? : ₹ 0.00

Commission Invoices with Payment Status:

Accounting Dashboard Overview Customers Vendors Accounting Reporting Configuration

Search...

NEW UPLOAD

Filters Group By Favorites

1-5/5

| Number | Customer | Invoice Date | Due Date | Activities | Tax Excluded | Total | Total in Currency | Payment Status | Status |
|---|-----------------|--------------|-------------|----------------------|--------------|--------------|-------------------|----------------|--------|
| <input type="checkbox"/> INV/2024/00005 | Kaushik Panchal | 02/08/2024 | | | ₹ 4,130.00 | ₹ 4,130.00 | ₹ 4,130.00 | Paid | Posted |
| <input type="checkbox"/> INV/2024/00004 | Deco Addict | 02/08/2024 | In 30 days | Follow-up on payment | ₹ 19,250.00 | ₹ 20,212.50 | ₹ 20,212.50 | Not Paid | Posted |
| <input type="checkbox"/> INV/2024/00003 | Deco Addict | 02/08/2024 | In 30 days | Call | ₹ 41,750.00 | ₹ 43,837.50 | ₹ 43,837.50 | Not Paid | Posted |
| <input type="checkbox"/> INV/2024/00002 | Azure Interior | 02/01/2024 | In 52 days | Include upsell | ₹ 31,750.00 | ₹ 33,337.50 | ₹ 33,337.50 | Not Paid | Posted |
| <input type="checkbox"/> INV/2024/00001 | Deco Addict | 01/18/2024 | 21 days ago | | ₹ 31,750.00 | ₹ 33,337.50 | ₹ 33,337.50 | Not Paid | Posted |
| | | | | | ₹ 128,630.00 | ₹ 134,855.00 | | | |

Things to be implemented

Claim (to-claim)

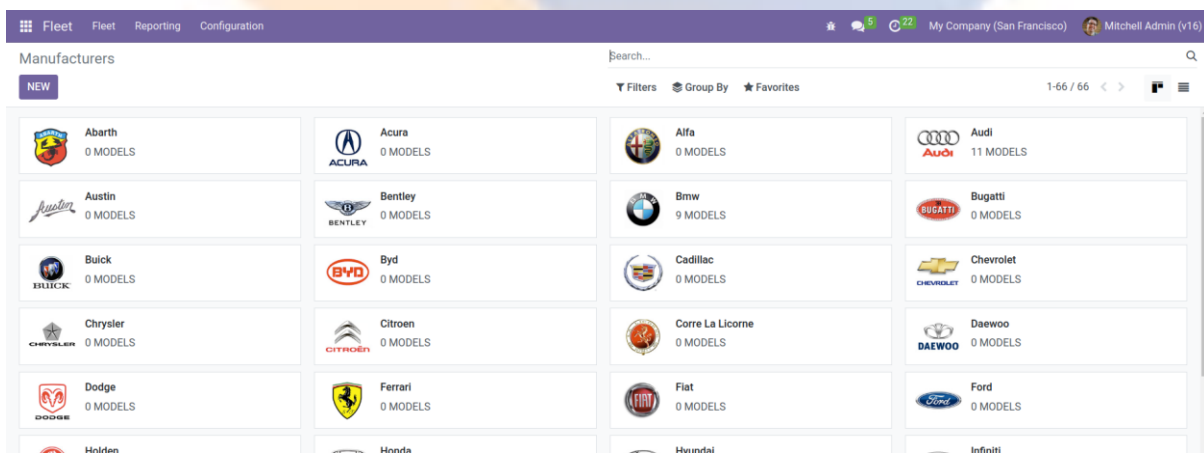
| Policy Main Details | Insured Members | Motor/Vehicle Details | Receipt | Claim |
|---------------------|-----------------|--------------------------------|---------|-------|
| Claim Entry | | | | |
| Claim Sr.No | : | <input type="text" value="0"/> | | |
| Claim Id | : | <input type="text" value="0"/> | | |
| Claim Dt | : | <input type="text"/> | | |
| Claim Pass Dt | : | <input type="text"/> | | |
| Claimed Amt | : | <input type="text" value="0"/> | | |
| Amount Passed | : | <input type="text"/> | | |
| File Submission Dt | : | <input type="text"/> | | |
| Query Submission Dt | : | <input type="text"/> | | |
| Remark | : | <input type="text"/> | | |

| # | 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



The screenshot displays the 'Manufacturers' view in the Odoo Fleet Management module. The interface includes a top navigation bar with 'Fleet', 'Reporting', and 'Configuration' tabs. A search bar and user information are visible on the right. The main content area shows a grid of manufacturer cards, each featuring a logo, the manufacturer's name, and the number of models available. The manufacturers listed are:

| Manufacturer | Models |
|------------------|-----------|
| Abarth | 0 MODELS |
| Acura | 0 MODELS |
| Alfa | 0 MODELS |
| Audi | 11 MODELS |
| Austin | 0 MODELS |
| Bentley | 0 MODELS |
| Bmw | 9 MODELS |
| Bugatti | 0 MODELS |
| Buick | 0 MODELS |
| Byd | 0 MODELS |
| Cadillac | 0 MODELS |
| Chevrolet | 0 MODELS |
| Chrysler | 0 MODELS |
| Citroen | 0 MODELS |
| Corre La Licorne | 0 MODELS |
| Daewoo | 0 MODELS |
| Dodge | 0 MODELS |
| Ferrari | 0 MODELS |
| Fiat | 0 MODELS |
| Ford | 0 MODELS |
| Holden | 0 MODELS |
| Honda | 0 MODELS |
| Hvundai | 0 MODELS |
| Infiniti | 0 MODELS |

Model Lists

Models

NEW

Contains Vehicles x Search...

Filters Group By Favorites 1-5 / 5

| Manufacturer | Model name | Vehicles | Category | Vehicle Type |
|---------------|------------|----------|----------|--------------|
| Audi (11) | | | | |
| Bmw (9) | | | | |
| Mercedes (13) | | | | |
| Mercedes | Class A | 1 | | Car |
| Mercedes | Class B | 0 | | Car |
| Mercedes | Class C | 0 | | Car |
| Mercedes | Class CL | 0 | | Car |
| Mercedes | Class CLS | 0 | | Car |
| Mercedes | Class E | 0 | | Car |
| Mercedes | Class GL | 0 | | Car |
| Mercedes | Class GLK | 0 | | Car |
| Mercedes | Class M | 0 | | Car |
| Mercedes | Class R | 0 | | Car |
| Mercedes | Class S | 0 | | Car |
| Mercedes | Class SLK | 0 | | Car |
| Mercedes | SLS | 0 | | Car |
| Opel (12) | | | | |
| Suzuki (1) | | | | |
| Suzuki | Ignis | 0 | Compact | Car |

| # | 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

Models / Suzuki/Ignis

Action 14 / 14 New

Model name ? Ignis

Manufacturer ? Suzuki

Vehicle Type ? Car

Category ? Compact

Information Vendors

MODEL

Seats Number ? 5

Doors Number ? 5

Color ? White

Model Year ? 2,018

Trailer Hitch ? ☐

ENGINE

Fuel Type ? Diesel

CO2 Emissions ? 0.00 g/km


Co2 Standard ?

Transmission ?

Power ? 0 kW

Horsepower ? 0

Horsepower Taxation ? 0.00



| # | 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

| <div> Fleet Fleet Reporting Configuration </div> <div> My Company (San Francisco) Mitchell Admin (v16) </div> | | | | | |
|---|------------------|----------|----------------|-------------------|-------------------------------|
| Vehicles <div> NEW </div> <div> Search... </div> <div> Filters Group By Favorites 1-5 / 5 </div> | | | | | |
| License Plate | Model | Category | Chassis Number | Registration Date | Tags |
| <input type="checkbox"/> 1-ACK-205 | Opel/Astra | | 5454541 | 03/09/2023 | Senior Employee Car Purchased |
| <input type="checkbox"/> 1-AUD-001 | Audi/A1 | | 455257985 | 02/08/2024 | Senior Employee Car Purchased |
| <input type="checkbox"/> 1-BMW-001 | Bmw/Serie 1 | | 54818 | 02/08/2024 | Senior Employee Car Purchased |
| <input type="checkbox"/> 1-MER-001 | Mercedes/Class A | | 789546128 | 02/08/2024 | Senior Employee Car Purchased |
| <input type="checkbox"/> 1-SYN-404 | Opel/Corsa | | 1337 | 06/20/2023 | Junior Employee Car Purchased |

| # | 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

Vehicles / Opel/Corsa/1-SYN-404

Action 5 / 5 < > New

1

Owner

1

Policies

Model ?

Opel/Corsa

License Plate ?

1-SYN-404

Tags ?

Junior x Employee Car x Purchased x

Company ?

My Company (San Francisco)

Tax Info

Model

Note

VEHICLE

Category ?

Registration Date ?

06/20/2023

Chassis Number ?

1337

Last Odometer ?

8,001.20

km

Location ?

Grand-Rosiere

MODEL

Model Year ?

Transmission ?

Color ?

Red

Seats Number ?

0

Doors Number ?

5

ENGINE

Horsepower ?

0

Power ?

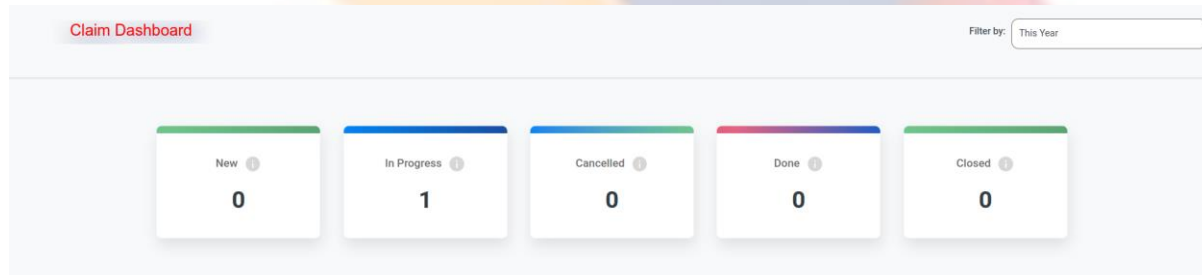
0

kw

Fuel Type ?

| # | 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



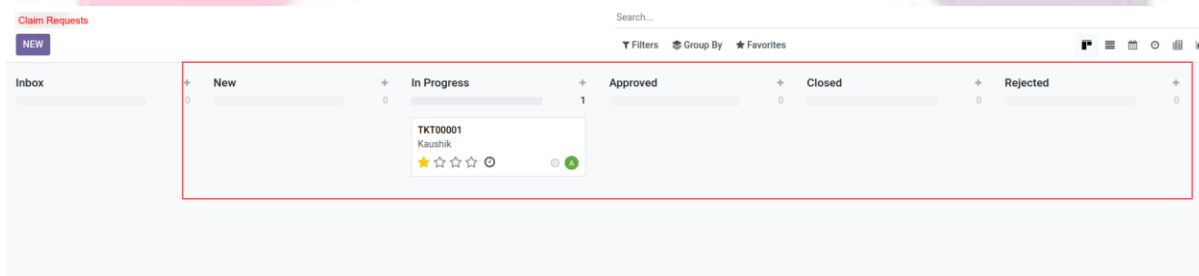
This 'Claim' screen has a filter at the top that allows users to select a specific year.

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

☐ Individual ☒ Company

Surveyor



| | | | | |
|---------|-------------|-----|--------------|-------------------------------------|
| Address | Street... | ZIP | Gujarat (IN) | Phone ? |
| | Street 2... | | | Mobile ? |
| | City | | | Email ? |
| | India | | | Website ? e.g. https://www.odoo.com |
| | | | | Tags ? Surveyor x |

| # | 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

0
Extra Prices

In: 0
Out: 0

1.00 Units
Sold

Product Name ?
☆ TATA - MOTOR

☒ Can be Sold ?
☒ Can be Purchased ?

General Information
Attributes & Variants
Sales
Purchase
Inventory
Accounting

UPSELL & CROSS-SELL

Optional Products ?
HEALTH ✕
TERM PLAN ✕

SALES DESCRIPTION

This note is added to sales orders and invoices.

| # | 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:

Claim Requests/ TKT00001

Print Action 1 / 1 < > New

REPLY INBOX NEW IN PROGRESS APPROVED CLOSED REJECTED

Name ?
TKT00001

Subject ?
POLICY:HL00001

Customer Name ? Kaushik

Ticket Type ?

Email ?

Phone ? 8690338778

Tags ?

Priority ? ★☆☆☆☆

Creation Date ? 02/12/2024 16:43:47

Start Date ? 02/12/2024 16:47:16

Policy MEDICLAIM (HEALTH) ✕

Issue Description Attachments Customer Rating Other Information

Claim for 15000

Add attachments

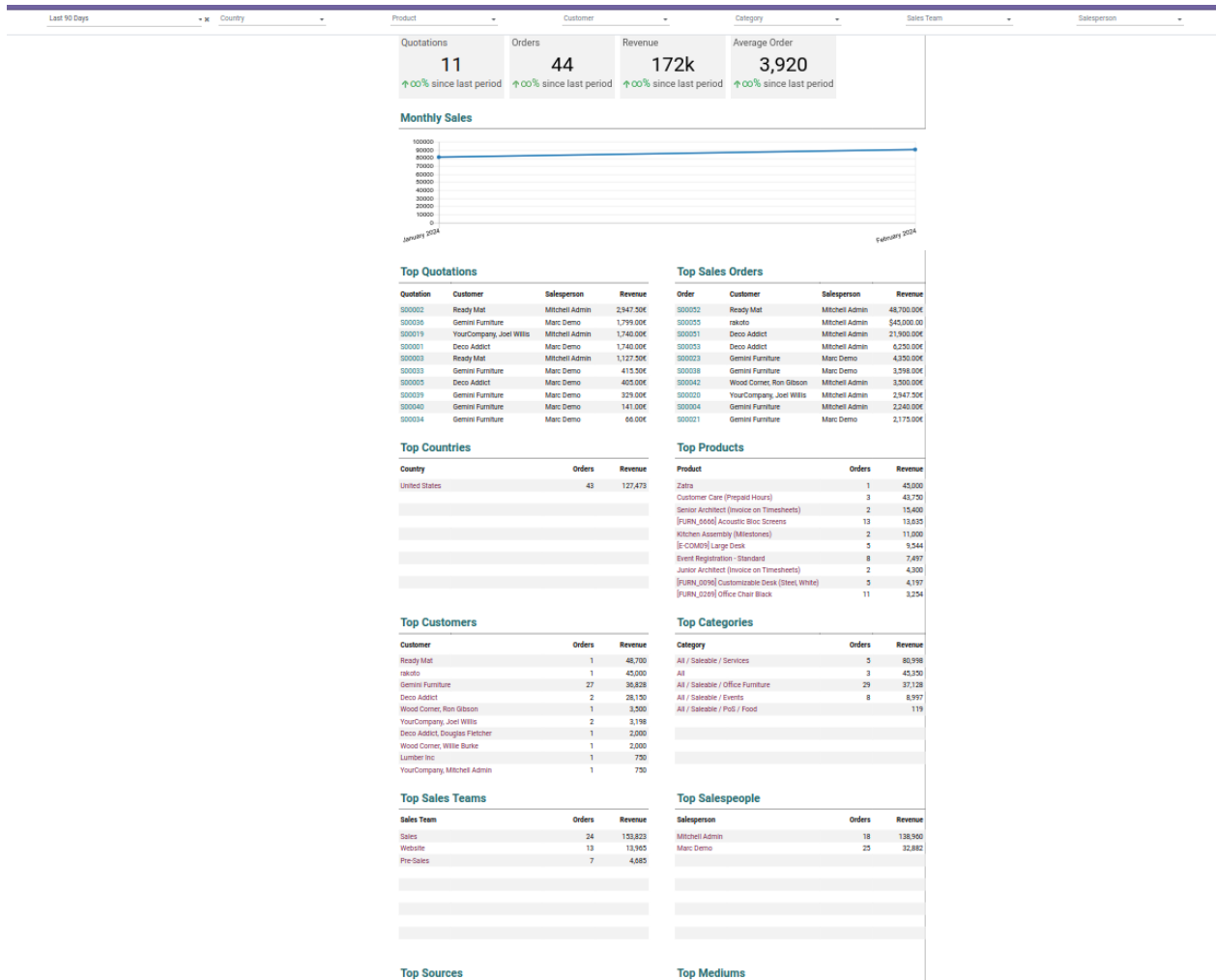
Send message Log note Activities 2 1 Following

Files

Job Card-15.pdf PDF Quotation - S00066.pdf PDF

| # | 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:

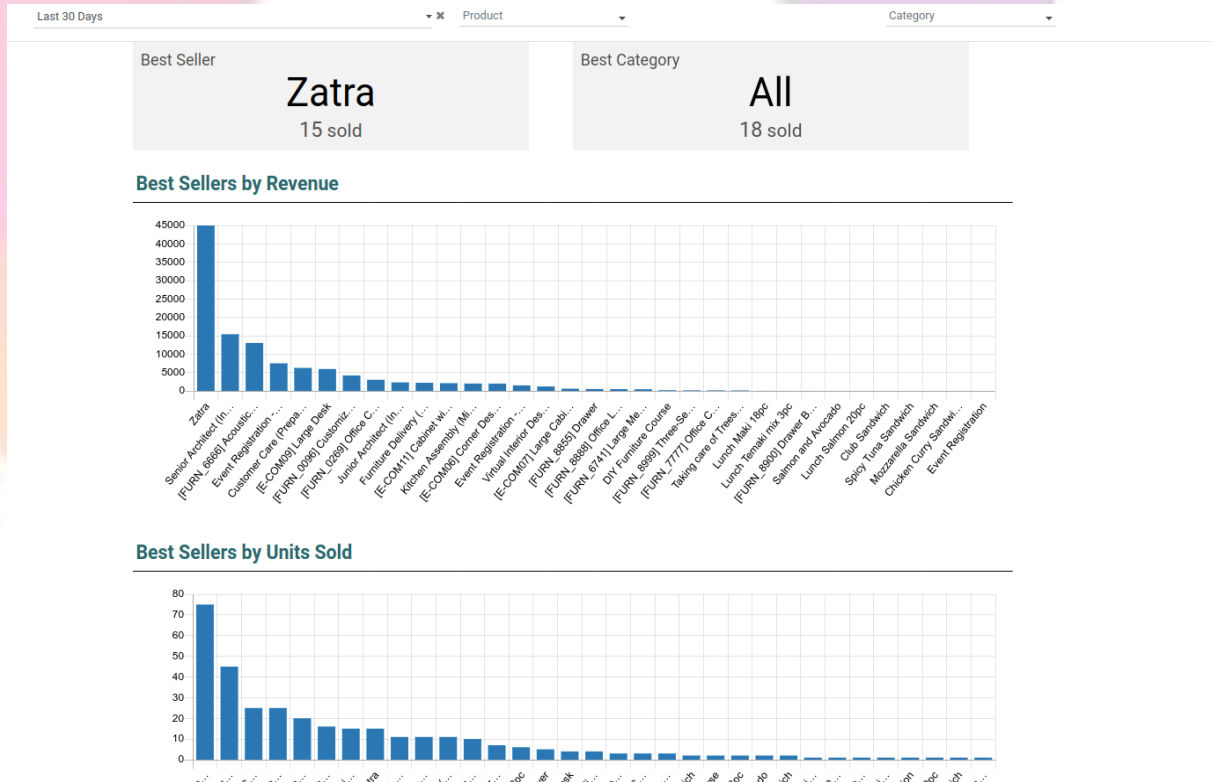
- Quotations: Total number of quotations generated.
- Orders: Total number of orders placed.
- Revenue: Total revenue generated from sales.
- Average Order Value: Average amount spent per order.

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.