Pharma Link Project

Problem Statement

Pharmacies often face inefficiencies in supply chain management due to:

- Manual inventory tracking
- Inconsistent order processing
- Error-prone financial handling

These inefficiencies result in frequent stock shortages, delays in restocking, and financial discrepancies. This project aims to resolve these issues by implementing an automated Odoo solution to streamline inventory control, order processing, and financial management.

Solutions

1. Inventory Management:

Product Categories:

- **Cosmetics:** Tracked based on **expiry dates** to prevent product expiration issues.
- **Other Products:** Tracked by **lots** for better traceability and control.

Warehouses:

- **Cairo WH**
- **Alex WH**
- **Delta WH**

Warehouse Locations & Sublocations:

- Each warehouse will have:
    - Dedicated **locations for cosmetics** and **other products**.
    - **Sublocations for raw materials** and other product categories (e.g., Africa products).

Resupply Management:

- **Reordering Rules** for Alexandria and Delta warehouses based on minimum and maximum stock levels.
- **Resupply from Central WH**: Activate resupply routes from Central WH to the other warehouses.

- **Make-to-order (MTO)** on specific products to prevent stockouts and manage on-demand orders.
- **Multi-step operations** for receipts and deliveries in the Central Warehouse linked with the **Quality Module** for better quality control.
- **Consignment Warehouse:** For products that are owned by suppliers but stored in the warehouse. Receipt operations and assignments will be handled by the same person.

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2. Financial Automation:

- Automated accounting with proper tracking of inventory accounts.
- **Expense Accounts:**
  - Cost of Goods Sold (COGS) for **cosmetics**.
  - COGS for **other products**.
- Outstanding accounts are managed automatically, reducing errors in financial reporting.

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3. Shipping Methods:

- Three shipping methods are defined for each warehouse (Cairo, Alex, Delta).
- One shipping method will offer **free shipping** if the order exceeds a specified value.
- Shipping methods are optimized per warehouse to reduce delivery time and improve customer satisfaction.

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4. Landed cost:

Problem: Pharmacies face pricing discrepancies due to unmanaged landed costs, leading to inaccurate inventory valuations and unexpected expenses.

Solution: Implementing a landed cost management feature in the Odoo inventory module enables accurate capture and allocation of all associated costs, ensuring precise product pricing and improved financial accuracy.

2. Purchase module

Problem:

Pharma Link faces several purchasing challenges:

- **Vendor Mismanagement**: Difficulty in selecting the best vendors.
- **Delayed Approvals**: Lack of a structured approval process leads to stockouts and increased costs.
- **Order Errors**: Frequent errors in Purchase Orders (POs), leading to returns and payment discrepancies.
- **Unauthorized Purchases**: Unapproved POs create unnecessary expenses.
- **Complex Supply Chain**: Managing MTO, drop shipping, and reordering manually causes logistical inefficiencies.
- **Manual Reordering**: Inefficient stock replenishment processes leading to stockouts.

Odoo Solutions:

1. **Vendor Management**
   - Centralized vendor data for better decision-making.
2. **Purchase Cycle & Approval Workflow**
   - Automated purchase approval workflows reduce delays and improve control.
3. **Lock POs & Warnings**
   - Prevent unauthorized PO changes and set up warnings for mismatched pricing or restricted vendors.
4. **Purchase Agreements & Alternatives**
   - Manage long-term vendor contracts and automate alternative vendor selection.
5. **Reordering Rules**
   - Automate stock replenishment to maintain optimal inventory levels.
6. **Receive Operations & 3-Way Matching**
   - Match PO, vendor bills, and receipts to ensure accuracy and prevent overpayments.
7. **MTO & Dropshipping**
   - Flexible routing for direct shipments and custom orders.

Benefits:

- Streamlined purchasing
- Improved vendor management
- Cost control through automation and approvals
- Better inventory management

3. Sales module

Pharma Link Sales Module: Problem & Solution Overview

Problem:

- **Inefficient Sales Cycle:** Delays and errors in moving from quotation to invoice.
- **Pricing Complexity:** Inconsistent pricing due to a lack of tailored price and discount management.
- **Margin Uncertainty:** Difficulty tracking costs and margins, affecting profitability.
- **Poor Customer Experience:** Lack of transparency and communication with customers.
- **Missed Upsell Opportunities:** Lost revenue due to the inability to upsell effectively.
- **Credit Risk:** No system to manage customer credit limits, increasing the risk of bad debt.

Odoo Solutions:

1. **Sales Workflow Automation**
   Streamline the process from **Quotation > Sales Order > Delivery > Invoice**, ensuring speed and accuracy.
2. **Quotation Templates**
   Standardize offers with reusable templates, saving time and ensuring consistency.
3. **Customer Portal**
   Improve customer communication and transparency with a self-service portal for quotations, orders, and invoices.
4. **Upsell & Discounts**
   Boost revenue through **Upsell** features and control d**iscount** management during the sales process.
5. **Cost & Margin Tracking**
   Monitor profitability by tracking product **costs** and **margins** for every sale.
6. **Pricelist Management**
   Tailor pricing strategies for different customers using custom **Pricelists**.
7. **Delivery Methods**
   Offer flexible **Delivery Method** options for improved customer satisfaction.
8. **Credit Limit Enforcement**
   Mitigate financial risk by automatically managing **customers' credit limits**.
9. **PDF Quote Builder**
   Create professional, branded quotations with the **PDF Quote Builder** to enhance presentation and competitiveness.

Key Benefits:

- Faster, more efficient sales cycle
- Increased upselling opportunities and revenue
- Improved customer satisfaction and loyalty
- Better control over pricing and margins
- Reduced credit risk

Pharma Link POS Module: Problem & Solution Overview

Problem: Pharma Link faces slow checkout processes, inconsistent pricing, poor customer experience, missed upsell opportunities, and credit risk issues.
Odoo Solution: Odoo's POS module streamlines transactions, automates real-time **Pricing & Discounts**, enhances **Customer Experience** with faster checkout and loyalty programs, enables **Upsell** features, and manages **Credit Limits** to reduce risk.
Key Benefits: Faster transactions, improved pricing consistency, increased upsell revenue, enhanced customer satisfaction, and reduced financial risk.

Make a different pricelist for sales on pos by unit

Pharma Link CRM Module: Problem & Solution Overview

Problem: Pharma Link struggles with unorganized lead management, inconsistent follow-ups, lost sales opportunities, poor customer relationship tracking, and lack of performance visibility.
Odoo Solution: Odoo's CRM module organizes **Lead Management**, automates **Follow-ups**, tracks **Customer Interactions**, and provides real-time visibility into sales performance through detailed reporting.
Key Benefits: Better lead tracking, improved customer relationships, timely follow-ups, increased sales opportunities, and enhanced decision-making through performance insights.

Make 2 teams and assign members
Maybe change in stages name

Business
Analysis : as is >>> to be
Analysis current process
Identify requirement
TO BE: solutions through odoo
Implementation
Configuration
Master data

4.Accounting Module

Pharma Link Accounting Module: Problem & Solution Overview

Problem:

· Inaccurate Financial Records: Manual entry errors can lead to discrepancies in financial statements.

· Time-Consuming Invoicing : Generating invoices manually can be tedious and slow.

· Difficulty in Tracking Expense: Tracking business expenses can be cumbersome, leading to missed deductions.

· Complex Tax Management :Keeping up with changing tax regulations can be challenging.

· Lack of Real-Time Financial Insights: Businesses struggle to get a clear picture of their financial health.

· Reporting Difficulties: Generating comprehensive financial reports can be complex.

Odoo Solution :

1. Inaccurate Financial Records : Odoo automates data entry through integration with other modules (like Sales and Inventory), reducing human error and ensuring real-time updates to financial records.

2. Time-Consuming Invoicing : Odoo allows users to create and send invoices quickly using templates. Automated invoicing features can also schedule recurring invoices for subscription-based services.

3. Difficulty in Tracking Expense: Odoo provides an expense management module that allows employees to submit expense reports easily. Managers can approve or reject these reports, ensuring clear visibility and tracking of all expenses.

4. Complex Tax Management : Odoo's accounting module includes features to manage different tax rates and automate tax calculations, ensuring compliance with local regulations.

5. Lack of Real-Time Financial Insights : Odoo's dashboard offers real-time reporting and key performance indicators (KPIs), enabling businesses to monitor their financial status and make informed decisions quickly.

6. Reporting Difficulties: Odoo includes customizable reporting tools that allow users to create detailed financial reports, such as profit and loss statements, balance sheets, and cash flow reports, with just a few clicks.

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