

ERP and CRM system Implementation using Odoo – Electronics Sales & Services Company

Project Overview

This project demonstrates the implementation of an essential integrated ERP and CRM system using Odoo to streamline sales, inventory, accounting, and customer management processes for a small-to-medium business. The goal was to enhance operational efficiency and improve data-driven decision-making.

Company Profile

Company: Greenleaf Electronics

Industry: Consumer Electronics

Location: New York, United States

Business Activities:

Sales of laptops, mobile phones, and electronic accessories

Premium subscription services

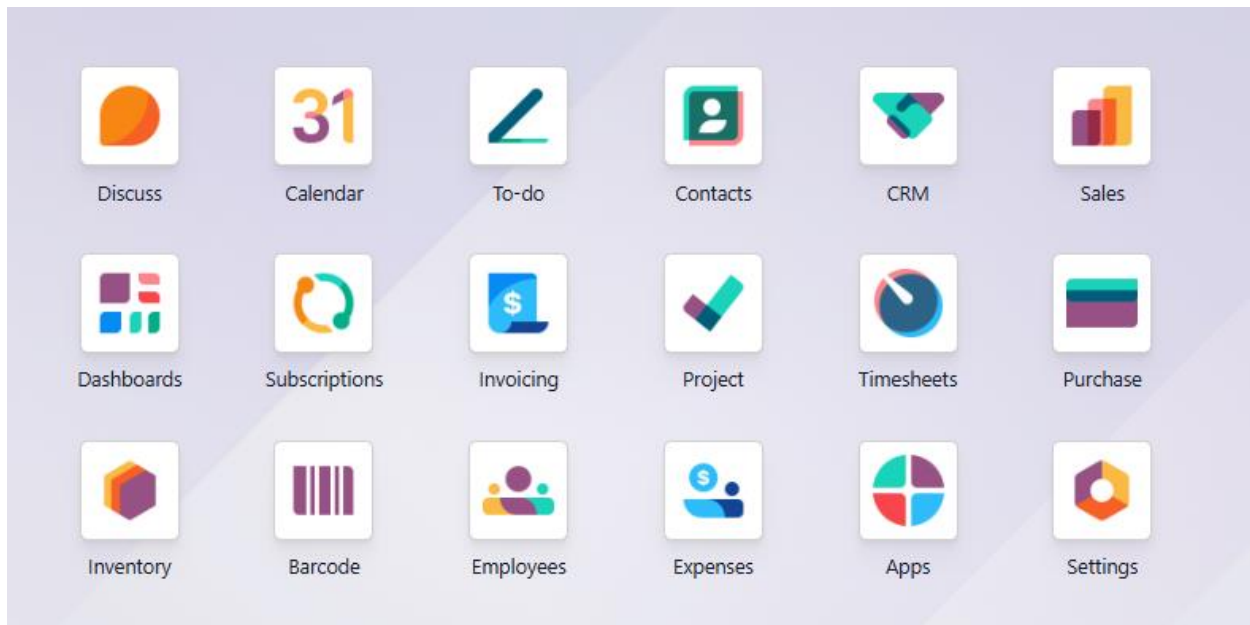
Laptop and phone repair services

Warehouses:

1. Main Warehouse (MS) – Primary stock and retail operations

2. Secondary Warehouse – Online Fulfillment (OF) – Used for inter-warehouse transfers and online order fulfillment.

This is the home screen of the company showing the apps that I used in this project.



Inventory

In the Inventory app, all company products and services are organized with their respective prices and specifications. I created entries for laptops, mobile devices, accessories, repair services, and premium subscriptions. The product list can be filtered by type- Goods, Subscriptions, or Services, for easier management and reporting.

Inventory Overview Operations Products Reporting Configuration

New Products Search...

1-20 / 20

☆ Laptop - ASUS Chromebook Price: \$ 250.00 On hand: 320.00	☆ Laptop - Apple MacBook Pro Late 2021 Price: \$ 2,500.00 On hand: 521.00	☆ Laptop - HP Stream Price: \$ 300.00 On hand: 541.00
☆ Laptop - Microsoft Surface Price: \$ 1,000.00 On hand: 160.00	☆ Laptop Model - Dell Price: \$ 1,200.00 On hand: 50.00	☆ Laptop Model - Lenovo Price: \$ 1,300.00 On hand: 60.00
☆ Laptop, Touchscreen - HP Price: \$ 570.00 On hand: 520.00	☆ NUU A15 Price: \$ 100.00 On hand: 265.00	☆ Setup service Price: \$ 100.00
☆ Smart Watch - Apple Price: \$ 350.00 On hand: 80.00	☆ Smart Watch - Samsung Price: \$ 280.00 On hand: 400.00	☆ Smartphone - Huawei P30 Price: \$ 350.00 On hand: 270.00
☆ Smartphone - Samsung Galaxy A16 Price: \$ 200.00 On hand: 320.00	☆ Smartphone Model - Xiaomi Price: \$ 500.00 On hand: 70.00	☆ Smartphone, Model - Apple Price: \$ 650.00 On hand: 30.00
☆ Smartphone, Model - Samsung Price: \$ 500.00 On hand: 40.00	☆ Tablet - Amazon Kindle Price: \$ 100.00 On hand: 320.00	☆ Tablet - Amazon fire HD Price: \$ 100.00 On hand: 250.00

greenleaf-electronics.odoo.com/odoo/action-288

Inventory Overview Operations Products Reporting Configuration

New Products Search...

1-3 / 3

☆ ChatGPT plus (premium) Price: \$ 20.00 per month\$ 1.00	☆ Spotify Premium Price: \$ 12.00 per month\$ 1.00	☆ Zoom Premium Price: \$ 15.00
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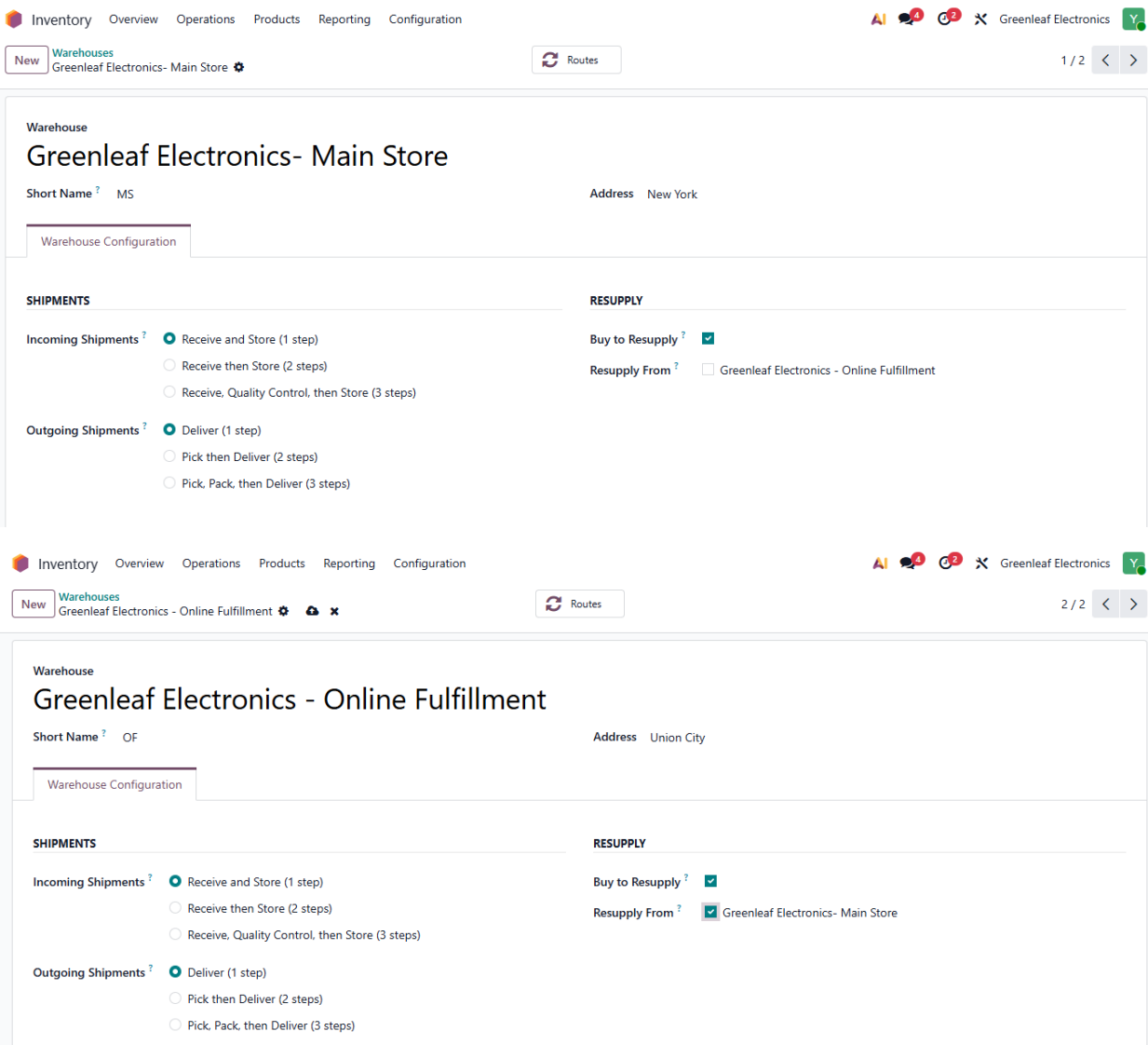
These are 2 warehouses with their specifications.

Inventory Overview Operations Products Reporting Configuration

New Warehouses

1-2 / 2

Warehouse	Location Stock	Address
Greenleaf Electronics- Main Store	MS/Stock	New York
Greenleaf Electronics - Online Fulfillment	OF/Stock	Union City



Purchase

The **Purchase app** provides a centralized view of all supplier transactions. All purchase orders from suppliers or vendors can be seen as shown below.

Purchase

Orders

Products

Reporting

Configuration

New

Upload

Requests for Quotation

1-3 / 3

0
New

0
RFQ Sent

0
Late RFQ

2
Not Acknowledged

0
Late Receipt

67 %
OTD

0.00
Days to Order

	Reference	Vendor	Buyer	Order Deadline	Activities	Total	Status
<input type="checkbox"/>	<input type="checkbox"/> P00003	ACT Manufacturing Inc	<input checked="" type="checkbox"/> Ye Htut		<input type="button" value="🕒"/>	\$ 37,440.00	<input type="button" value="Purchase Order"/>
<input type="checkbox"/>	<input type="checkbox"/> P00002	John Smart Phone Ltd	<input checked="" type="checkbox"/> Ye Htut		<input type="button" value="🕒"/>	\$ 6,000.00	<input type="button" value="Purchase Order"/>
<input type="checkbox"/>	<input type="checkbox"/> P00001	TechSource Ltd	<input checked="" type="checkbox"/> Ye Htut		<input type="button" value="🕒"/>	\$ 20,900.00	<input type="button" value="Purchase Order"/>
						\$ 64,340.00	

I created a purchase order to acquire multiple laptop models from an external vendor (ACT Manufacturing Inc). Once the order was confirmed, it was sent to the vendor for processing. The payment was recorded, and upon delivery, the receipt was validated in Odoo, automatically updating the stock levels in the Inventory.

Purchase

Orders

Reporting

Configuration

New

Requests for Quotation

P00003

Price Comparison

1 / 3

<

>

Send RFQ

Confirm Order

Print

Cancel

RFQ

RFQ Sent

Purchase Order

Request for Quotation

☆ P00003

Vendor ?

ACT Manufacturing Inc

Vendor Reference ?

Currency

USD

Order Deadline ?

Oct 6, 9:32 PM

Expected Arrival ?

Oct 6, 9:32 PM

No data yet

Deliver To ?

Greenleaf Electronics - Main Store: Receipts

Products

Other Information

Product	Quantity	Unit Price	Taxes	Amount
Laptop - Microsoft Surface	20.00	800.00	4%	\$ 16,000.00
Laptop - ASUS Chromebook	30.00	250.00	4%	\$ 7,500.00
Laptop Model - Lenovo	10.00	1,300.00		\$ 13,000.00



Greenleaf Electronics
New York NY United States

Shipping address
Greenleaf Electronics- Main Store

ACT Manufacturing Inc
New York
United States
☎ 134525235

Purchase Order #P00003

Buyer
Ye Htut

Order Date:
10/06/2025

Expected Arrival:
10/06/2025

Description	Qty	Unit Price	Disc.	Taxes	Amount
Laptop - Microsoft Surface	20.00	800.00	0.00%	4%	\$ 16,000.00
Laptop - ASUS Chromebook	30.00	250.00	0.00%	4%	\$ 7,500.00
Laptop Model - Lenovo	10.00	1,300.00	0.00%		\$ 13,000.00
Untaxed Amount					\$ 36,500.00
Tax 4% on \$ 23,500.00					\$ 940.00
Total					\$ 37,440.00

Payment Terms:

dr.yehtut.1995@gmail.com

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Receipt MS/IN/00003



Order:
P00003

Warehouse:
New York

Status:
Ready

Scheduled Date:
10/06/2025

Vendor:
ACT Manufacturing Inc
☎ 134525235

Product

Laptop - Microsoft Surface
Laptop - ASUS Chromebook
Laptop Model - Lenovo

Quantity To

20 MS/Stock
30 MS/Stock
10 MS/Stock

Sales

The **Sales module** manages the complete sales lifecycle, from quotation to payment. In the sales app, all sales to the customers are recorded as follows.

Sales Orders To Invoice Products Reporting Configuration

New Quotations

My Quotations Search...

1-10 / 10

<input type="checkbox"/>	Number	Creation Date	Customer	Salesperson	Activities	Total	Status
<input type="checkbox"/>	S00011	Sep 26, 8:32 PM	John Henry	Ye Htut		\$ 54.60	Sales Order
<input type="checkbox"/>	S00013	Oct 6, 9:44 PM	James Doe	Ye Htut		\$ 767.04	Sales Order
<input type="checkbox"/>	S00012	Sep 26, 8:41 PM	John Henry	Ye Htut		\$ 5.20	Sales Order
<input type="checkbox"/>	S00010	Sep 26, 8:30 PM	John Henry	Ye Htut	Call	\$ 93.60	Sales Order
<input type="checkbox"/>	S00009	Sep 26, 8:28 PM	Alice Wang	Ye Htut		\$ 15.60	Sales Order
<input type="checkbox"/>	S00007	Sep 26, 8:19 PM	John Henry	Ye Htut		\$ 46.80	Sales Order
<input type="checkbox"/>	S00005	Sep 26, 8:11 PM	Alice Wang	Ye Htut		15.60 B	Quotation
<input type="checkbox"/>	S00004	Sep 26, 8:01 PM	Alice Wang	Ye Htut		46.80 B	Quotation
<input type="checkbox"/>	S00003	Sep 26, 7:55 PM	Alice Wang	Ye Htut		0.00 B	Cancelled
<input type="checkbox"/>	S00001	Sep 25, 11:08 PM	John Henry	Ye Htut		4,004.00 B	Sales Order
						\$ 5,049.24	

When a customer requests products or services, a quotation is prepared detailing the order items, quantities, and pricing.

Sales Orders To Invoice Products Reporting Configuration

New Quotations

New

Send Print Confirm Preview

Quotation Quotation Sent Sales Order

New

Customer James Doe

Expiration ? Nov 7

Recurring Plan

Pricelist ? Default (USD)

Payment Terms Immediate

Order Lines Other Info Notes

Product	Quantity	Unit Price	Taxes	Disc.%	Amount
Laptop - HP Stream	1.00	300.00	4%	0.00	\$ 300.00
Smart Watch - Apple	1.00	350.00		0.00	\$ 350.00
Setup service	1.00	100.00	4%	0.00	\$ 100.00
Spotify Premium	1.00	1.00	4%	0.00	\$ 1.00

Add a product

Add a section

Add a note

Catalog



Greenleaf Electronics
New York NY United States

James Doe

Quotation # S00013

Quotation Date	Expiration	Salesperson		
10/06/2025	11/07/2025	Ye Htut		
Description	Quantity	Unit Price	Taxes	Amount
Laptop - HP Stream	1.00 Units	\$ 300.00	4%	\$ 300.00
Smart Watch - Apple	1.00 Units	\$ 350.00		\$ 350.00
Setup service	1.00 Units	\$ 100.00	4%	\$ 100.00
Spotify Premium	1.00 Units	\$ 1.00	4%	\$ 1.00
Untaxed Amount				\$ 751.00
Tax 4% on \$ 401.00				\$ 16.04
Total				\$ 767.04

After the customer confirms the quotation, it is validated as a **Sales Order**. The system automatically generates an **invoice**, which is sent to the customer. Once payment is registered, the transaction is finalized, completing the sales workflow.

Sales Orders To Invoice Products Reporting Configuration

New Quotations / S00013 INV/2025/00006 (S00013)

Sale Orders

1 / 1

Send Print Pay Preview Credit Note Reset to Draft

Draft Posted

Send message Log note Activity

Customer Invoice

INV/2025/00006

Customer James Doe

Invoice Date Oct 6

Due Date Oct 6

Currency in USD

Invoice Lines Other Info

Product	Quantity	Price	Taxes	Amount
Laptop - HP Stream	1.00	300.00	4%	\$ 300.00
Smart Watch - Apple	1.00	350.00		\$ 350.00
Setup service	1.00	100.00	4%	\$ 100.00
Spotify Premium	1.00	1.00	4%	\$ 1.00

Terms and Conditions

Untaxed Amount: \$ 751.00
Tax 4%: \$ 16.04
Total: \$ 767.04

Today

Ye Htut 9:48 PM
Invoice validated
No → Yes (Reviewed)
None → INV/2025/00006 (Number)
None → INV/2025/00006 (Payment Reference)
Draft → Posted (Status)

Ye Htut 9:48 PM
This is invoice for your order

Ye Htut 9:48 PM
This journal entry has been created from: S00013

Ye Htut 9:48 PM
Invoice Created

James Doe

Invoice INV/2025/00006

Invoice Date	Due Date	Source	Reference
10/06/2025	10/06/2025	S00013	S00013

Description	Quantity	Unit Price	Taxes	Amount
Laptop - HP Stream	1.00	300.00	4%	\$ 300.00
Smart Watch - Apple	1.00	350.00		\$ 350.00
Setup service	1.00	100.00	4%	\$ 100.00
Spotify Premium	1.00	1.00	4%	\$ 1.00

Payment Communication: INV/2025/00006

Untaxed Amount	\$ 751.00
Tax 4% on \$ 401.00	\$ 16.04
Total	\$ 767.04
<i>Paid on 10/06/2025</i>	\$ 767.04
Amount Due	\$ 0.00

SalesOrdersTo InvoiceProductsReportingConfiguration

New / S00013 / INV/2025/00006 (S00013) S00013

Delivery1Invoices1

1 / 1 < >

SendPreviewCancel

QuotationQuotation SentSales Order

S00013

Customer James DoeOrder Date ? Oct 6, 9:46 PMPricelist ? Default (USD)Payment Terms Immediate

Order LinesOther InfoNotes

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	
Laptop - HP Stream	1.00	0.00	1.00	300.00	4%	0.00	\$ 30
Smart Watch - Apple	1.00	0.00	1.00	350.00		0.00	\$ 35
Setup service	1.00	0.00	1.00	100.00	4%	0.00	\$ 10
Spotify Premium	1.00	0.00	1.00	1.00	4%	0.00	\$
Add a productAdd a sectionAdd a noteCatalog							

Discount

Send messageLog noteActivity

Today

Ye Htut 9:50 PMInvoice INV/2025/00006 paid

Ye Htut 9:46 PMQuotation confirmedQuotation Sent → Sales Order (Status)

Ye Htut 9:46 PM

Subject: Greenleaf Electronics Quotation (Ref S00013)
Hello,
Your quotation S00013 amounting in \$ 767.04 is ready for review.
Do not hesitate to contact us if you have any questions.
...

Quotation # S00013

Quotation - S00013...

Ye Htut 9:44 PMSales Order created

The delivery order for this sale can also be checked and seen as shown below. It can also be viewed in the **Inventory** app. It shows the movement of products from stock to the customer. Once validated, the system updates the inventory levels automatically, reflecting the completed delivery.

SalesOrdersTo InvoiceProductsReportingConfiguration

New

/ INV/2025/00006 (S00013) / S00013

MS/OUT/00002

MovesBarcode

1 / 1

PrintReturn

DraftWaitingReadyDone

Send messageLog noteActivity

SearchIconUser1

☆ MS/OUT/00002

Delivery AddressJames Doe

Scheduled Date?Oct 6, 9:46 PM

Operation TypeGreenleaf Electronics- Main Store: Delivery Orders

Effective Date?Oct 6, 9:55 PM

Source LocationMS/Stock

Source Document?S00013

Operations

Additional Info

Note

Product	Demand	Quantity	
Laptop - HP Stream	1.00	1.00	Details
Smart Watch - Apple	1.00	1.00	Details
Setup service	1.00	1.00	Details

Today

Ye Htut 9:55 PM

Ready → Done (Status)

Ye Htut 9:55 PM

SMS

Greenleaf Electronics: We are glad to inform you that your order n° S00013 has been shipped.

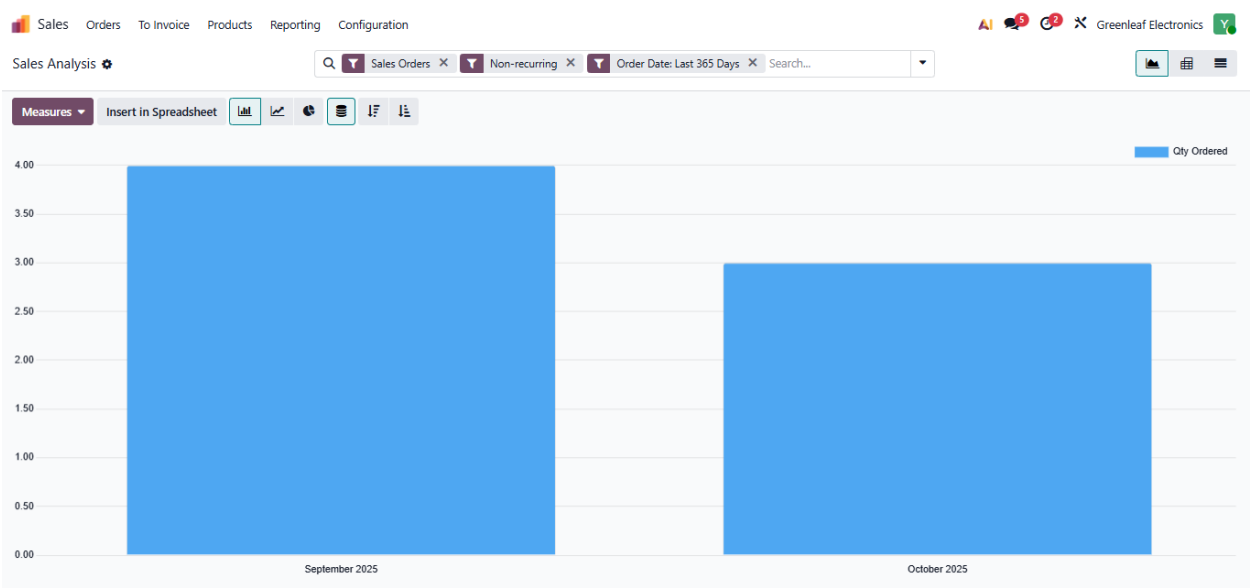
Ye Htut 9:46 PM

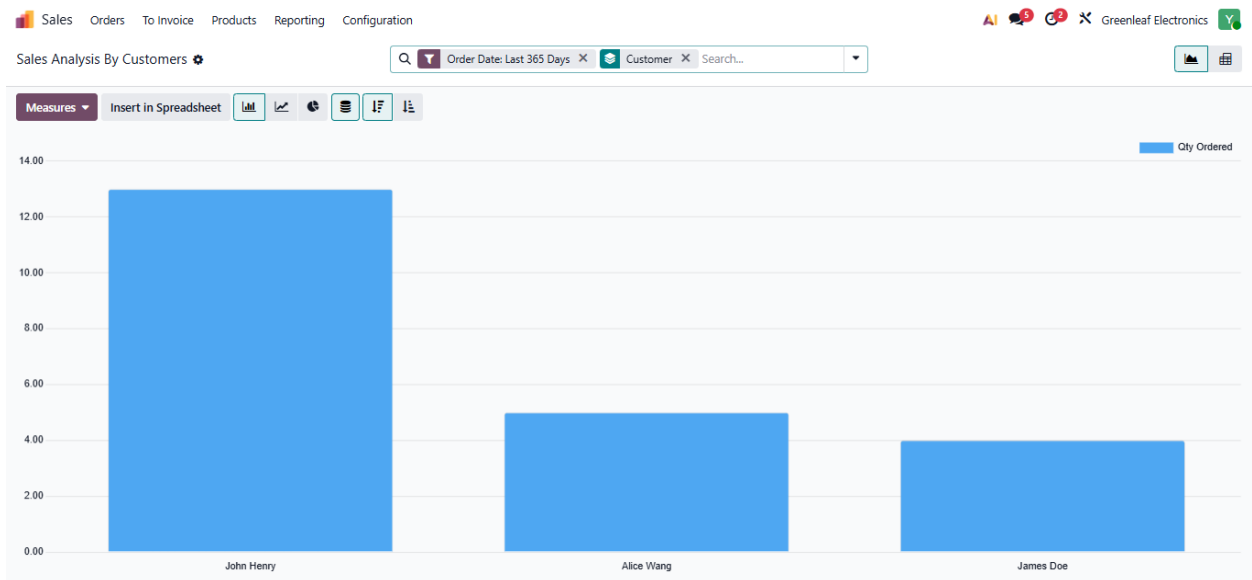
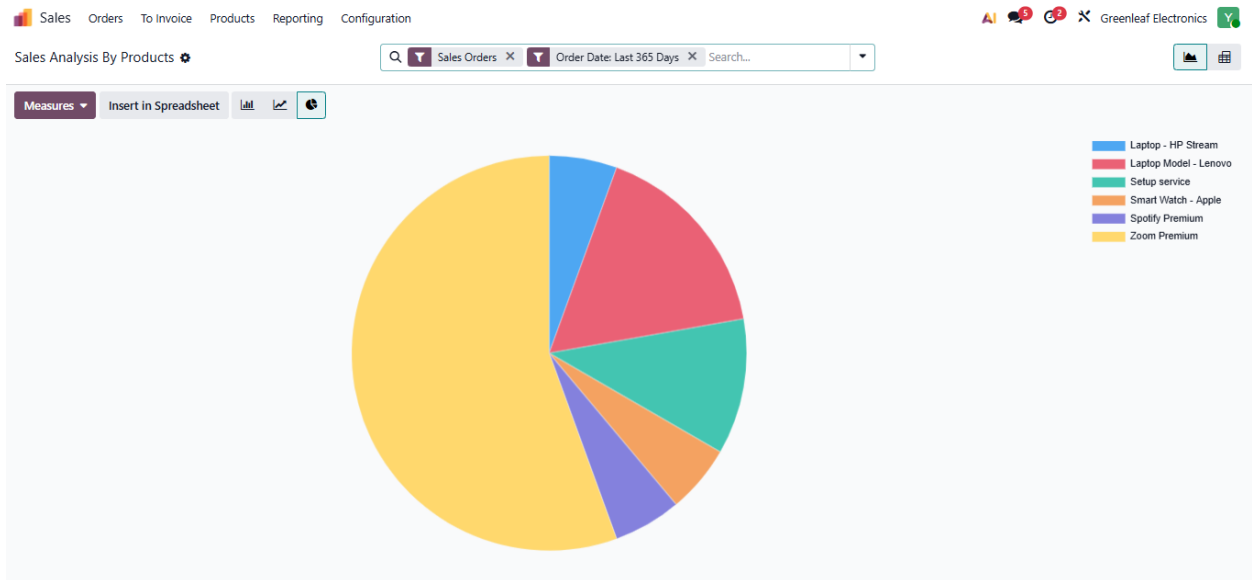
This transfer has been created from: S00013

Ye Htut 9:46 PM

Transfer created

The Sales Analysis dashboard in the Sales app provides an overview of the company’s sales performance through visualization charts and key metrics. It displays data such as total revenue, sales by product category, helping the company monitor trends and make data-driven decisions.





CRM

The CRM module displays leads across various stages, including New, Qualified, Proposition, and Won, in a pipeline. This staged view allows better tracking of each lead's journey and helps manage the sales pipeline more effectively.

The screenshot shows a CRM Pipeline view with four stages: New, Qualified, Proposition, and Won. Each stage contains cards for different leads with their names, expected revenue, and status.

Stage	Lead Name	Expected Revenue	Status
New (\$2,450)	TechSource Ltd's opportunity - Laptops, smartwatches	\$2,400.00	Y
	Alice Wang's Zoom premium * 3 acc	\$50.00	Y
	John Smart Phone Ltd's opportunity - premium services		Y
Qualified (\$1,600)	ChatGPT plus permium * 5	\$100.00	Y
	Best Accessories's opportunity	\$1,500.00	Y
Proposition (\$5,000)	John Henry - Lenovo laptop	\$5,000.00	Y
Won (\$101)	Jersey Cindy - Tablet and premium services	\$101.00	Y

In the CRM app, new leads can be created with key information such as customer or company name, expected revenue, and profitability. Users can also add log notes and schedule or modify activities to maintain organized and effective communication with potential clients.

The screenshot shows a detailed view of a lead named James Doe. It includes contact information, salesperson details, and a list of planned activities.

James Doe's opportunity - tablet, phone, premium services

Expected Revenue: \$4,000.00
Probability: 95.45 %

Contact: James Doe
Email: jamesdoe@example.com
Phone: 18585656

Salesperson: Ye Htut
Expected Closing: No closing estimate

Planned Activities

- Due in 4 days: "Call" for Ye Htut
Call to remind his interest
✓ Mark Done ✕ Edit ✕ Cancel
- Ye Htut 11:24 PM
\$0.00 → \$4,000.00 (Expected Revenue)
- Ye Htut 11:22 PM
delegate call duty
- Ye Htut 11:20 PM
Lead/Opportunity created

From this lead, the complete sales process, including quotation creation and invoicing, can be initiated directly. Once confirmed, the corresponding sales order is automatically updated in the Sales app, ensuring seamless integration between CRM and Sales modules.

CRM Sales Reporting Configuration

New

Pipel... / James Doe's opportunity - tablet, phone, premi...
S00020

1 Projects
0 Tasks

Delivery
1

1 / 1

Create Invoice Send Preview Cancel

Quotation Quotation Sent Sales Order

Send message Log note Activity

S00020

Customer James Doe

Order Date ? Oct 6, 11:26 PM

Pricelist ? Default (USD)

Payment Terms Immediate

Order Lines Other Info Notes

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	
Smartphone, Model - Samsung	4.00	0.00	0.00	500.00		0.00	\$ 2,000.00
Tablet - Huawei	5.00	0.00	0.00	200.00	4%	0.00	\$ 1,000.00
Zoom Premium	4.00	0.00	0.00	15.00	4%	0.00	\$ 60.00

Add a product Add a section Add a note Catalog

Terms and conditions...

Discount

Untaxed Amount: \$ 3,060.00

Tax 4%: \$ 42.40

Send message Log note Activity

Today

Ye Htut 11:26 PM

Quotation confirmed

Quotation Sent → Sales Order (Status)

Ye Htut 11:25 PM

Subject: Greenleaf Electronics Quotation (Ref S00020)

Hello,

Your quotation S00020 (with reference: James Doe's opportunity - tablet, phone, premium services) amounting in \$ 3,102.40 is ready for review.

Do not hesitate to contact us if you have any questions.

...

Quotation - S00020...

Ye Htut 11:25 PM

Sales Order created

1 new notificati



Greenleaf Electronics
New York NY United States

James Doe

Quotation # S00020

Quotation Date
10/06/2025

Expiration
11/05/2025

Salesperson
Ye Htut

Description	Quantity	Unit Price	Taxes	Amount
Smartphone, Model - Samsung	4.00 Units	\$ 500.00		\$ 2,000.00
Tablet - Huawei	5.00 Units	\$ 200.00	4%	\$ 1,000.00
Zoom Premium	4.00 Units	\$ 15.00	4%	\$ 60.00
Untaxed Amount				\$ 3,060.00
Tax 4% on \$ 1,060.00				\$ 42.40
Total				\$ 3,102.40

James Doe

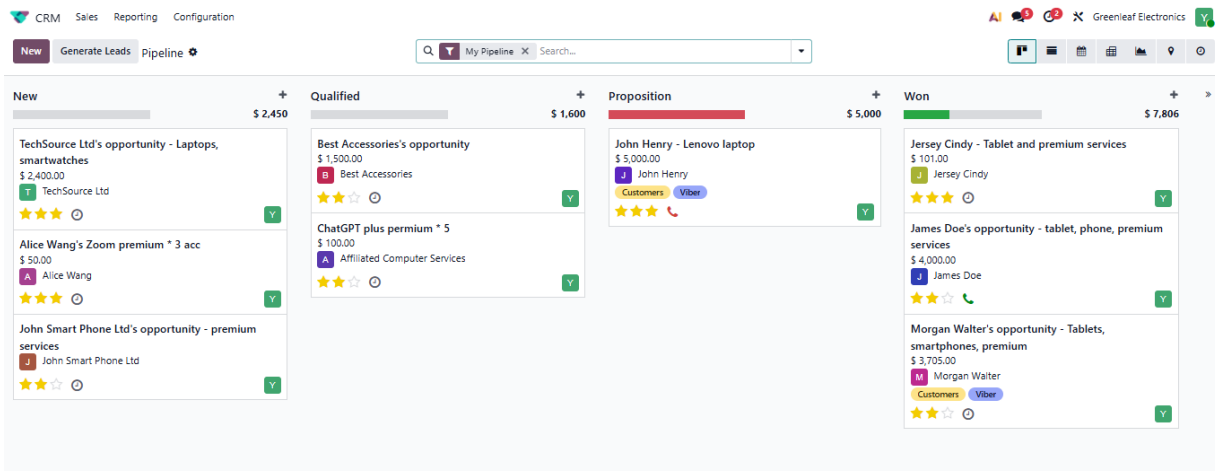
Invoice INV/2025/00012

Invoice Date	Due Date	Source	Reference
10/06/2025	10/06/2025	S00020	S00020

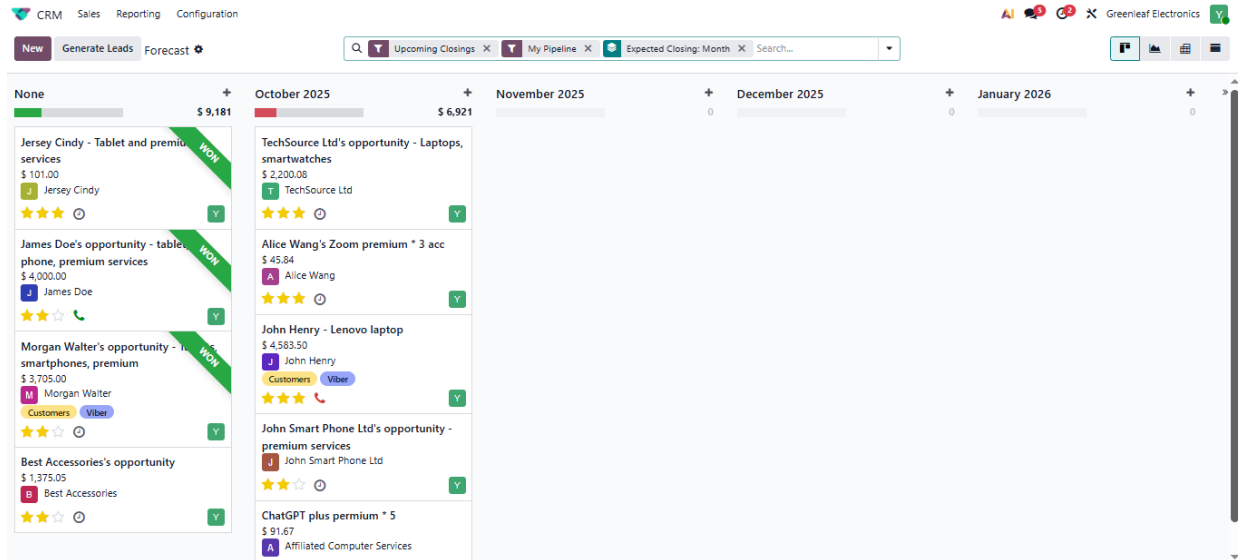
Description	Quantity	Unit Price	Taxes	Amount
Smartphone, Model - Samsung	4.00	500.00		\$ 2,000.00
Tablet - Huawei	5.00	200.00	4%	\$ 1,000.00
Zoom Premium	4.00	15.00	4%	\$ 60.00

Payment Communication: INV/2025/00012	Untaxed Amount	\$ 3,060.00
	Tax 4% on \$ 1,060.00	\$ 42.40
	Total	\$ 3,102.40

The stage of a lead can be changed to Won once the corresponding sales order has been paid and completed. This enables effective tracking of leads and provides a clear overview of the sales conversion process.



The CRM app allows viewing the lead pipeline in various formats, including list, calendar, pivot, and graph views, as illustrated below. These visualizations help track progress, monitor team performance, and extract valuable business insights.



Contacts Contacts Configuration

Greenleaf Electronics

New Contacts

Search...

1-17 / 17

	Name	Email	Phone	Activities	Country	
<input type="checkbox"/>	ACT Manufacturing Inc	actmanufacturing@example.com	134525235	○	United States	📅 1
<input type="checkbox"/>	Affiliated Computer Services	afcsservice@example.com	1453425463	○	United States	★ 1
<input type="checkbox"/>	Alice Wang	alicewang@example.com	1323514	○	United States	🔍 1 ★ 1 \$ 4
<input type="checkbox"/>	Best Accessories	bestaccessories@example.com	1 23423	○	United States	★ 1
<input type="checkbox"/>	Greenleaf Electronics	dr.yehtut.1995@gmail.com		○	United States	
<input type="checkbox"/>	James Doe	jamesdoe@example.com	18585656	○		🔍 2 ★ 1 \$ 2
<input type="checkbox"/>	Jersey Cindy	jerseyc@example.com	18569646	○	United States	🔍 1 ★ 1 \$ 3
<input type="checkbox"/>	John Henry	johnhenry@example.com	1342343	○	United States	🔍 6 ★ 1 \$ 5 🔄 1
<input type="checkbox"/>	John Smart Phone Ltd	johnsmartphone@example.com	126423254	○	United States	★ 1 📅 1
<input type="checkbox"/>	Morgan Walter	morganwalter@example.com	15252367	○	United States	🔍 2 ★ 1 \$ 2
<input type="checkbox"/>	NC Computer	nccomputer@gmail.com	102395395	○	United States	
<input type="checkbox"/>	New York			○		
<input type="checkbox"/>	Peter Johnson	peter234@example.com	134543523	○	United States	
<input type="checkbox"/>	Sara Windy	sarawindy@example.com	157375754	○		

1 new notificat

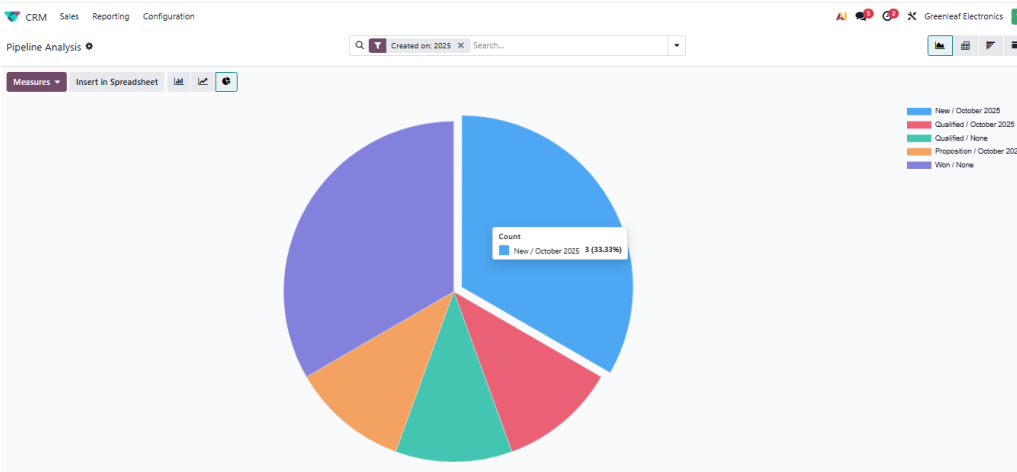
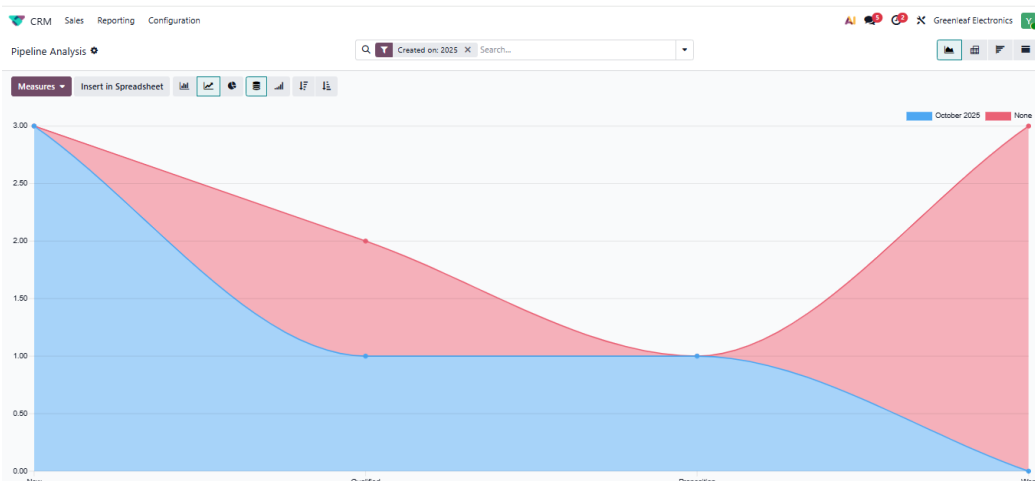
CRM Sales Reporting Configuration

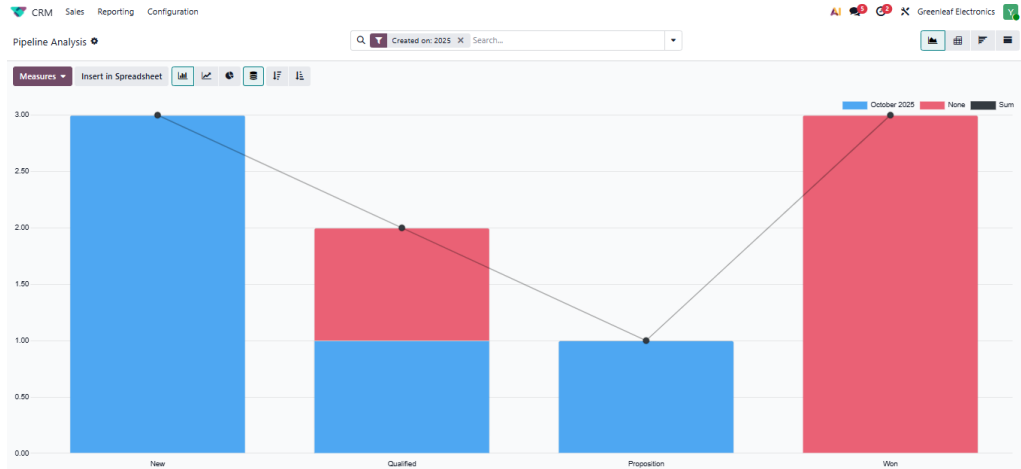
Pipeline

My Pipeline

	Total	New	Qualified	Proposition	Won	
	Expected Revenue	Expected Revenue	Expected Revenue	Expected Revenue	Expected Revenue	Expected Revenue
Total	\$ 2,450.00	\$ 1,600.00	\$ 5,000.00	\$ 8,305.00	\$ 17,355.00	
September 2025	\$ 50.00		\$ 5,000.00		\$ 5,050.00	
Sales	\$ 50.00		\$ 5,000.00		\$ 5,050.00	
Florida	\$ 50.00				\$ 50.00	
New York			\$ 5,000.00		\$ 5,000.00	
October 2025	\$ 2,400.00	\$ 1,600.00		\$ 8,305.00	\$ 12,305.00	
Sales	\$ 2,400.00	\$ 1,600.00		\$ 8,305.00	\$ 12,305.00	
Florida				\$ 3,705.00	\$ 3,705.00	
Houston		\$ 100.00			\$ 100.00	
New York	\$ 2,400.00	\$ 1,500.00			\$ 3,900.00	
Washington				\$ 600.00	\$ 600.00	
None				\$ 4,000.00	\$ 4,000.00	

Furthermore, the CRM module provides analytical views with charts and graphs, enabling better visualization of the lead pipeline and deeper insights into conversion trends and team performance.





Contact

The Contacts module provides a centralized view of all business-related contacts, including customers, vendors, suppliers, and leads. Users can create new contacts with key information - name, email, address, phone number, and record logs, activities, and notes to maintain organized communication and engagement history.

Contacts Contacts Configuration

New Contacts Search...

1-17 / 17

<input type="checkbox"/>	Name	Email	Phone	Activities	Country	
<input type="checkbox"/>	ACT Manufacturing Inc	actmanufacturing@example.com	134525235		United States	
<input type="checkbox"/>	Affiliated Computer Services	afcsservice@example.com	1453425463		United States	
<input type="checkbox"/>	Alice Wang	alicewang@example.com	1323514		United States	
<input type="checkbox"/>	Best Accessories	bestaccessories@example.com	1 23423		United States	
<input type="checkbox"/>	Greenleaf Electronics	dr.yehtut.1995@gmail.com			United States	
<input type="checkbox"/>	James Doe	jamesdoe@example.com	18585656			
<input type="checkbox"/>	Jersey Cindy	jerseyc@example.com	18569646		United States	
<input type="checkbox"/>	John Henry	johnhenry@example.com	1342343		United States	
<input type="checkbox"/>	John Smart Phone Ltd	johnsmartphone@example.com	126423254		United States	
<input type="checkbox"/>	Morgan Walter	morganwalter@example.com	15252367		United States	
<input type="checkbox"/>	NC Computer	nccomputer@gmail.com	102395395		United States	
<input type="checkbox"/>	New York					
<input type="checkbox"/>	Peter Johnson	peter234@example.com	134543523		United States	
<input type="checkbox"/>	Sara Windy	sarawindy@example.com	157375754			


1 new notificat

Contacts Contacts Configuration

New Contacts MSC Tech LTD

Opportunities 0 Sales 0 Invoiced \$ 0.00 Subscriptions 0 Meetings 0 Tasks 0 Purchases 0

1 / 1 < >



MSC Tech LTD

msctech@example.com

1352356

Address Street... Street 2... Huston State ZIP United States

Tax ID [?] not applicable

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

Tags B2B X Sales and business promotion activ... X

Contacts Sales & Purchase Invoicing Notes

Add Contact

Send message Log note Activity

Planned Activities

Due in 2 days: "Call" for Ye Htut
To call for meeting request
✓ Mark Done ✎ Edit ✕ Cancel

Due in 4 days: "MSC Tech LTD" for Ye Htut
Organized by Ye Htut
dryehtut.1995@gmail.com
✓ Mark Done 📅 Reschedule ✕ Cancel

Today

Ye Htut 11:47 PM
assign customer contact to project assistant

Ye Htut 11:46 PM
Contact created

Subscriptions

The Subscriptions module provides a complete view of all customer subscriptions, including recurring plans, current status, and related activities. Detailed subscription records, log notes, and schedule or track planned activities can be viewed to ensure effective management and customer follow-up.

Subscriptions Subscriptions Products Reporting Configuration

New Subscriptions

Search...

1-3 / 3 < >

<input type="checkbox"/> Number	Customer	Next Invoic [▲]	Salesperson	Activities	Recurring	Recurring Plan	Subscription Status
<input type="checkbox"/> S00010	John Henry	Nov 1	Ye Htut	Call	\$ 90.00	Monthly	In Progress
<input type="checkbox"/> S00015	Jersey Cindy	Nov 1	Ye Htut	Call	\$ 20.00	Monthly	In Progress
<input type="checkbox"/> S00014	Jersey Cindy	Nov 1	Ye Htut	Call	\$ 15.00	Monthly	In Progress

Subscriptions Subscriptions Products Reporting Configuration

New Subscriptions S00015

1 Projects 1 Tasks 1 Delivery 1 Invoices 1 MRR \$ 20.00

2 / 3

Create Invoice Send Preview Cancel Upsell Renew Close

Quotation Quotation Sent Sales Order

S00015 In Progress

Customer Jersey Cindy Washington United States

Order Date ? Oct 7, 8:07 PM

Recurring Plan Monthly until

Next Invoice ? Nov 1

Pricelist ? Default (USD)

Payment Terms Immediate

Order Lines Other Info Notes

Product	Quantity	Delivered	Invoiced	Unit Price	Taxes	Disc.%	
Tablet - Amazon Kindle	1.00	0.00	1.00	100.00	4%	0.00	\$ 10
ChatGPT plus (premium)	1.00	0.00	1.00	20.00	4%	0.00	\$ 2

Add a product Add a section Add a note Catalog

Send message Log note Activity

Planned Activities

Due in 7 days: "To-Do" for Ye Htut

Follow up -

Mark Done Edit Cancel

Today

Ye Htut 8:12 PM

Call done : Call

Original note:

Feedback >>

Ye Htut 8:10 PM

To-Do done : To-Do

Feedback:

His feedback >>

Ye Htut 8:07 PM

Invoice INV/2025/00013 paid

Ye Htut 8:07 PM

10/07/2025 → 11/01/2025 (Next Invoice)

Ye Htut 8:07 PM

Subscription state has changed

Quotation Sent → Sales Order (Status)

Using the Upsell functionality, additional subscription orders can be generated directly from a customer's current subscription. This enables cross-selling and enhances revenue opportunities while maintaining a streamlined workflow.

Subscriptions Subscriptions Products Reporting Configuration

New Subscriptions / S00015 S00022

1 Projects 1 Tasks 1 Delivery 1 Invoices 1 MRR \$ 20.00

1 / 1

Send Print Confirm Preview Create Alternative Cancel

Quotation Quotation Sent Sales Order

S00022 Upsell

Customer Jersey Cindy Washington United States

Expiration ? Nov 6

Recurring Plan Monthly

Pricelist ? Default (USD)

Payment Terms Immediate

Order Lines Other Info Notes

Product	Quantity	Unit Price	Taxes	Disc.%	Amount
ChatGPT plus (premium)	3.00	20.00	4%	0.00	\$ 60.00

(*) These recurring products are discounted according to the prorated period from 10/07/2025 to 10/31/2025

Add a product Add a section Add a note Catalog

Send message Log note Activity

Today

Ye Htut 8:15 PM

\$ 0.00 → \$ 62.40 (Total)

\$ 0.00 → \$ 60.00 (Untaxed Amount)

\$ 0.00 → \$ 60.00 (MRR)

Ye Htut 8:14 PM

This upsell order has been created from the subscription S00015.

- Start Date: 2025-10-07
- Next Invoice: 2025-11-01
- MRR: 20.0
- Untaxed Total: 120.0

Ye Htut 8:14 PM

Sales Order created

Subscriptions Subscriptions Products Reporting Configuration

New / S00015 / S00022 INV/2025/00015 (S00022)

Payments 1 Sale Orders 1

1 / 1

Send Print Preview Credit Note Reset to Draft Draft Posted

Customer Invoice
INV/2025/00015

Customer: Jersey Cindy
Washington
United States

Invoice Date: Oct 7
Due Date: Oct 7
Currency: in USD

Invoice Lines Other Info

Product	Quantity	Price	Taxes	Amount
ChatGPT plus (premium) (*) 25 days 10/07/2025 to 10/31/2025	3.00	20.00	4%	\$ 60.00
(*) These recurring products are discounted according to the prorated period from 10/07/2025 to 10/31/2025				

Terms and Conditions

Untaxed Amount: \$ 60.00
Tax 4%: \$ 2.40

PAID

Greenleaf Electronics
New York NY United States

Invoice INV/2025/00015

Invoice Date: 10/07/2025 Due Date: 10/07/2025 Source: S00022 Reference: S00022

Description	Quantity	Unit Price	Taxes	Amount
ChatGPT plus (premium) (*) 25 days 10/07/2025 to 10/31/2025	3.00	20.00	4%	\$ 60.00

(*) These recurring products are discounted according to the prorated period from 10/07/2025 to 10/31/2025

Payment Communication: INV/2025/00015

Untaxed Amount	\$ 60.00
Tax 4%	\$ 2.40
Total	\$ 62.40

di.yehut.1995@gmail.com Page: 1 / 1

For each customer, the subscription and upsell history can be accessed, showing all previous subscriptions, recurring plans, and additional orders created through upselling. This allows better tracking of customer engagement and sales performance over time

Subscriptions Subscriptions Products Reporting Configuration

Subscriptions / S00010 History

Search...

1-3 / 3

Number	Customer	Salesperson	Activities	Recurring	Recurring Plan	Total	Subscription Status
S00012	John Henry	Ye Httut	Call	\$ 5.00	Monthly	\$ 5.20	Upsell
S00011	John Henry	Ye Httut	Call	\$ 52.50	Monthly	\$ 54.60	Upsell
S00010	John Henry	Ye Httut	Call	\$ 90.00	Monthly	\$ 93.60	In Progress

The Subscriptions module offers a Kanban view to monitor the progress and status of each subscription. Analytical charts and graphs provide visual insights into subscription performance, recurring revenue, and upsell effectiveness, supporting data-driven decision-making.

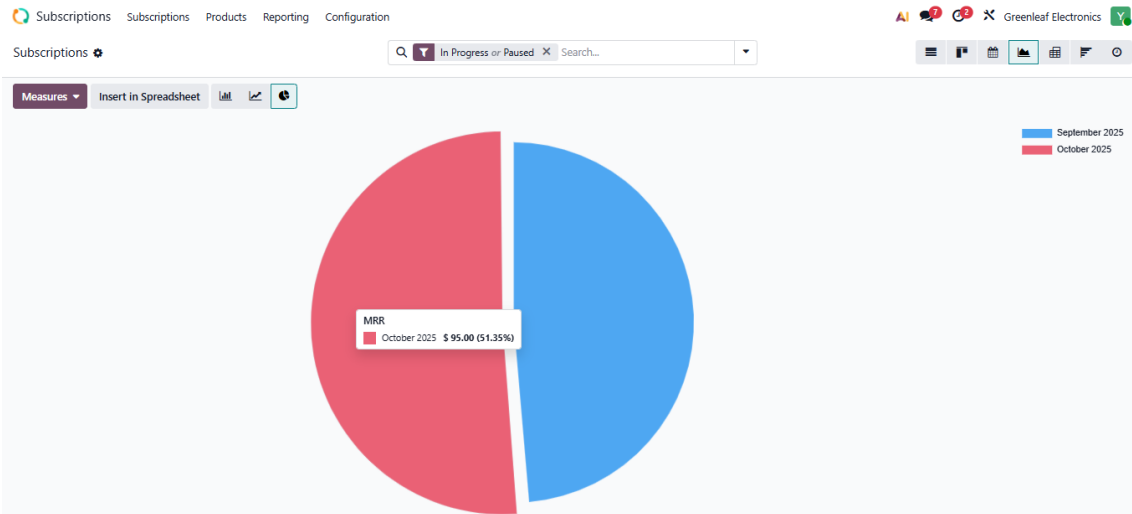
Subscriptions Subscriptions Products Reporting Configuration

New Subscriptions

Search... In Progress or Paused

In Progress 3 Paused 0

Jersey Cindy S00014	\$ 15.00 Monthly	Y
Jersey Cindy S00015	\$ 80.00 Monthly	Y
John Henry S00010	\$ 90.00 Monthly	Y



Subscriptions Subscriptions Products Reporting Configuration

New Products Subscriptions Search...

1-3 / 3

☆ ChatGPT plus (premium)
Price: \$ 20.00 per month\$ 1.00

☆ Spotify Premium
Price: \$ 12.00 per month\$ 1.00

☆ Zoom Premium
Price: \$ 15.00

Project

Upon entering the Projects module, all ongoing and completed projects can be viewed in a list format. Each record includes key information such as the associated customer, tags, time interval, assigned team members, and the total number of tasks under the project.

Project Projects Tasks Reporting Configuration

New Projects Search...

1-8 / 8

<p>☆ S00007 - Zoom Premium setup</p> <p>John Henry</p> <p>Sep 29 → Sep 30</p> <p>Urgent</p> <p>5 Tasks</p> <p>Y</p>	<p>☆ S00009 - Zoom Premium setup</p> <p>Alice Wang</p> <p>Oct 7 → Oct 9</p> <p>Urgent</p> <p>5 Tasks</p> <p>P</p>	<p>☆ S00010 - Zoom Premium setup</p> <p>John Henry</p> <p>5 Tasks</p> <p>Y</p>	<p>☆ S00014 - Zoom Premium setup</p> <p>Jersey Cindy</p> <p>0 Tasks</p> <p>Y</p>
<p>☆ S00015 - ChatGPT plus (premium)</p> <p>Jersey Cindy</p> <p>1 Tasks</p> <p>Y</p>	<p>☆ S00017 - Zoom Premium setup</p> <p>Morgan Walter</p> <p>0 Tasks</p> <p>Y</p>	<p>☆ S00018 - Zoom Premium setup</p> <p>Morgan Walter</p> <p>0 Tasks</p> <p>Y</p>	<p>☆ S00020 - Zoom Premium setup</p> <p>James Doe</p> <p>0 Tasks</p> <p>Y</p>

Within each project, detailed tasks can be created and managed by assigning responsible team members, setting deadlines, and defining allowed time. Additional information such as task descriptions, activities, log notes, and employee timesheets can also be recorded to ensure efficient project tracking and accountability.

The screenshot displays a project management application interface. At the top, there are navigation tabs: Project, Projects, Tasks, Reporting, and Configuration. Below these, a breadcrumb trail shows 'New Projects / S00009 - Zoom Premium setup Task 1 - customer consultation, requirement gathering'. A 'Sales Order' button is visible. The main task card for 'Task 1 - customer consultation, requirement gathering' is shown in the 'In Progress' stage. It includes details such as Project (S00009 - Zoom Premium setup), Assignees (Kim Edward), Customer (Alice Wang), Sales Order Item (S00009 - Zoom Premium (Alice Wang)), Deadline (Oct 8, 9:00 PM), and Allocated Time (05:00 (40%)). A table below the task card shows a timesheet entry for Oct 7 by Kim Edward, with a description of 'Day 1' and 'Time Spent' of 02:00. To the right, a chat window shows messages from Ye Htut and Kim Edward, including task assignments and a deadline reminder.

The tasks within a project can be visualized on a Kanban board, organized into stages such as To Do, In Progress, and Done for clear tracking of project progress. Each task card displays key information including priority level, assigned staff, allocated time, and deadline, allowing for easy monitoring and management of ongoing work.

The screenshot shows a Kanban board with four columns: To Do, In Progress, Done, and Cancelled. Each column has a count of tasks. The 'To Do' column has 2 tasks, 'In Progress' has 2, 'Done' has 1, and 'Cancelled' has 0. The tasks are as follows:

- To Do:**
 - Task 4 - Make payment to Zoom (Alice Wang, Tomorrow, 01:00, 3 stars, status S)
 - Task 5 - set reminder for next month payment (Alice Wang, In 2 days, 01:00, 2 stars, status S)
- In Progress:**
 - Task 2 - Contact Zoom for premium services (Alice Wang, Tomorrow, 02:00, 1 star, status J)
 - Task 3 - Create zoom premium account with user email (Alice Wang, Tomorrow, 01:00, 2 stars, status J)
- Done:**
 - Task 1 - Customer Consultation, Requirement gathering (Alice Wang, 3 stars, status K)

In the project app, expenses associated with each project can be created and managed. Expense bills can be generated, validated, and marked as paid. All expenses for a project can also be viewed in a list, providing transparency and control over project spending.

Project

Projects

Tasks

Reporting

Configuration

New

Projects / Expenses

Phone Bill

1 / 1

<

>

Attach Receipt

Submit

Split Expense

Draft

Approved

Posted

Paid

Send message

Log note

Activity

Description

Phone Bill


Category [EXP_GEN] Expenses

Expense Date Oct 7

Total \$ 1.50 USD

Manager Auto-validation

Included taxes ? \$ 0.00


Employee  Kim Edward

Paid By ☒ Employee (to reimburse)

☐ Company

Notes...

Today

 Ye Htut 9:18 PM
Expense created

Project

Projects

Tasks

Reporting

Configuration

New

Expenses / Phone Bill

BILL/2025/10/0001 (Phone Bill)

1 / 1

<

>

Print

Pay

Reset to Draft

Draft

Posted


Send message

Log note

Activity

Purchase Receipt

BILL/2025/10/0001

Vendor  Kim Edward

Bill Date Oct 7

Bill Reference Phone Bill

Accounting Date Oct 7

Payment Reference ? Use Bill Reference

Recipient Bank ?

Due Date Oct 7


Currency in USD

Invoice Lines

Other Info

Label	Quantity	Unit	Price	Taxes	Amount
Kim Edward: Phone Bill	1.00	Units	1.50		\$ 1.50

Today

 Ye Htut 9:19 PM
Journal entry created from this expense: Phone Bill

Project

Projects

Tasks

Reporting

Configuration

New

Expenses / Phone Bill

BILL/2025/10/0001 (Phone Bill)

1 / 1

<

>

Print

Reset to Draft

Draft

Posted


Send message

Log note

Activity

Purchase Receipt

BILL/2025/10/0001

Vendor  Kim Edward

Bill Date Oct 7

Bill Reference Phone Bill

Accounting Date Oct 7

Payment Reference ? Use Bill Reference

Recipient Bank ?

Due Date Oct 7

Currency in USD

Invoice Lines

Other Info



Label	Quantity	Unit	Price	Taxes	Amount
Kim Edward: Phone Bill	1.00	Units	1.50		\$ 1.50

Terms and Conditions

Untaxed Amount: \$ 1.50

Total: \$ 1.50

Today

 Ye Htut 9:20 PM
Invoice paid
Not Paid → Paid (Payment Status)
 Ye Htut 9:19 PM
Journal entry created from this expense: Phone Bill

Project Projects Tasks Reporting Configuration

Tasks Sales Orders Purchase Orders Expenses

Upload New Projects Expenses

Q search...

1-1 / 1

STATUS	Employee	Description	Expense Date	Category	Paid By	Activities	Total	Status
<input type="checkbox"/> Draft <input type="checkbox"/> Submitted <input type="checkbox"/> Approved <input type="checkbox"/> Posted <input type="checkbox"/> In Payment <input type="checkbox"/> Paid <input type="checkbox"/> Refused	<input type="checkbox"/> Kim Edward	Phone Bill	Oct 7	[EXP_GEN] Expenses	Employee (to reimburse)		\$ 1.50	Paid
							\$ 1.50	

EMPLOYEE

All
Kim Edward

From the project app, purchase orders for necessary materials from vendors can be created directly and linked to the respective project. These purchase orders can then be processed, validated, and paid, ensuring seamless coordination between project management and procurement. The list of all purchase orders can also be seen.

Project Projects Tasks Reporting Configuration

New Projects / Purchase Orders P00004

1 / 1

Confirm Order Send RFQ Print Cancel

RFQ RFQ Sent Purchase Order

Send message Log note Activity

Today

Request for Quotation

☆ P00004

Vendor ? Zoom Company

Order Deadline ? Oct 7, 9:25 PM

Vendor Reference ?

Expected Arrival ? Oct 7, 9:25 PM No data yet

Currency USD

Ask confirmation

Deliver To ? Greenleaf Electronics- Main Store: Receipts

Products Other Information

Product	Quantity	Unit	Unit Price	Taxes	Amount
Zoom Premium	1.00	Units	8.00	4%	\$ 8.00

Add a product Add a section Add a note Catalog

Define your terms and conditions ...

Untaxed Amount: \$ 8.00
Tax 4%: \$ 0.32

Send message Log note Activity

Ye Htut 9:27 PM
RFQ → RFQ Sent (Status)

Ye Htut 9:27 PM
Subject: Greenleaf Electronics Order (Ref P00004)
Dear Zoom Company
Here is in attachment a request for quotation P00004 from Greenleaf Electronics.
If you have any questions, please do not hesitate to contact us.
Best regards,
...

Request for Quotation P00004

Ye Htut 9:26 PM
Purchase Order created

No new notifications



Greenleaf Electronics
New York NY United States

Shipping address
Greenleaf Electronics- Main Store

Zoom Company

Purchase Order #P00004

Buyer
Ye Htut

Order Date:
10/07/2025

Expected Arrival:
10/07/2025

Description	Qty	Unit Price	Disc.	Taxes	Amount
Zoom Premium	1.00 Units	8.00	0.00%	4%	\$ 8.00
Untaxed Amount					\$ 8.00
Tax 4%					\$ 0.32
Total					\$ 8.32

Payment Terms:

Project
Projects
Tasks
Reporting
Configuration

AI
7
2
Greenleaf Electronics

Tasks
Sales Orders
Purchase Orders
Expenses

New
Projects
Purchase Orders

Q search...
1-1 / 1

	Reference	Confirmation Date	Vendor	Next Activity	Buyer	Total	Status	Expected Arrival
<input type="checkbox"/> ☆	P00004	Oct 7, 9:27 PM	Zoom Company	🕒	Ye Htut	\$ 8.32	Purchase Order	Oct 7, 9:25 PM
						\$ 8.32		

The project module includes a dashboard feature that allows visualization of important project insights, including profitability, time spent, and resource utilization. This helps evaluate project efficiency and supports data-driven decision-making.

Project Projects Tasks Reporting Configuration

New Projects S00009 - Zoom Premium setup Dashboard

Search...

Tasks 1 / 6 (17%) Timesheets 8 Hours Sales Orders 1 Sales Order Items 1 Purchase Orders 1

Burndown Chart

No updates found. Let's create one!

Get a snapshot of the status of your project and share its progress with key stakeholders.

Profitability

Revenues	Expected	To Invoice	Invoiced
▶ Timesheets (Fixed Price)	\$ 15	\$ 0	\$ 15
Total Revenues	\$ 15	\$ 0	\$ 15

Costs	Expected	To Bill	Billed
Purchase Orders	\$ -8	\$ -8	\$ 0
Expenses	\$ -2	\$ 0	\$ -2
Total Costs	\$ -10	\$ -8	\$ -2

Total	Expected	To Invoice	Invoiced
	\$ 6 +37%	\$ -8	\$ 14 +90%

Project Projects Tasks Reporting Configuration

New Projects S00009 - Zoom Premium setup Dashboard

Search...

Tasks 1 / 6 (17%) Timesheets 8 Hours Sales Orders 1 Sales Order Items 1 Purchase Orders 1

Burndown Chart

No updates found. Let's create one!

Get a snapshot of the status of your project and share its progress with key stakeholders.

Profitability

Revenues	Expected	To Invoice	Invoiced
▶ Timesheets (Fixed Price)	\$ 15	\$ 0	\$ 15
Total Revenues	\$ 15	\$ 0	\$ 15

Costs	Expected	To Bill	Billed
Purchase Orders	\$ -8	\$ -8	\$ 0
Expenses	\$ -2	\$ 0	\$ -2
Total Costs	\$ -10	\$ -8	\$ -2

Total	Expected	To Invoice	Invoiced
	\$ 6 +37%	\$ -8	\$ 14 +90%

Timesheet

The Timesheet app enables project managers to monitor and analyze the time spent on individual tasks. Employees can record their working hours directly while performing assigned tasks, allowing transparent time tracking and efficient project management.

Timesheets Timesheets To Validate Reporting Configuration

Add a Line All Timesheets Search...

Today	← Week →	Sun, Oct 5	Mon, Oct 6	Tue, Oct 7	Wed, Oct 8	Thu, Oct 9	Fri, Oct 10	Sat, Oct 11	Time Spent
J James Doe		0:00	0:00	4:00	0:00	0:00	0:00	0:00	4:00
S00009 - Zoom Premium setup		0:00	0:00	4:00	0:00	0:00	0:00	0:00	4:00
+ Add a line									
K Kim Edward		0:00	0:00	2:00	0:00	0:00	0:00	0:00	2:00
S00009 - Zoom Premium setup		0:00	0:00	2:00	0:00	0:00	0:00	0:00	2:00
+ Add a line									
S Sara Windy		0:00	0:00	2:00	0:00	0:00	0:00	0:00	2:00
S00009 - Zoom Premium setup		0:00	0:00	2:00	0:00	0:00	0:00	0:00	2:00
+ Add a line									
Y Ye Htut		0:00	0:00	0:15	0:00	0:00	0:00	0:00	0:15
Internal		0:00	0:00	0:15	0:00	0:00	0:00	0:00	0:15
+ Add a line									
				8:15					8:15

Timesheets Timesheets To Validate Reporting Configuration

My Timesheets Search...

Stop Discard 00:00:05 Describe your activity... Internal Meeting

Today	← Week →	Sun, Oct 5	Mon, Oct 6	Tue, Oct 7	Wed, Oct 8	Thu, Oct 9	Fri, Oct 10	Sat, Oct 11	Time Spent
a Internal		0:00	0:00	0:30	0:00	0:00	0:00	0:00	0:30
b Internal Meeting		0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
c Internal Training		0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
+ Add a line									
				0:30					0:30

Key Learnings

- Gained hands-on experience implementing an integrated ERP and CRM system using Odoo, covering all core business operations - Sales, Purchase, Inventory, CRM, Accounting, Projects, and Timesheets.
- Understood how modular ERP architecture allows smooth data flow between different business processes (e.g., sales orders triggering deliveries, invoices, and accounting entries).
- Learned how to configure warehouses, routes, and stock locations, and troubleshoot common issues such as replenishment and inter-warehouse transfer rules.
- Developed a solid understanding of procurement and sales workflows, including quotation management, purchase orders, invoicing, and payment validation.
- Applied CRM principles by managing leads and opportunities through different pipeline stages and integrating them directly with the sales module.
- Learned to manage subscription services, including recurring billing, upsell opportunities, and customer retention tracking.
- Acquired knowledge in project management workflows, creating and monitoring tasks, recording timesheets, managing expenses, and linking purchases directly to projects.
- Gained experience generating and interpreting business performance dashboards and analytical reports, using charts and KPIs to support decision-making.

- Improved skills in data accuracy and process automation, ensuring consistency across modules like Sales, Inventory, and Accounting.
- Enhanced overall understanding of ERP implementation challenges, configuration best practices, and how such systems drive business efficiency and profitability.