

## 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

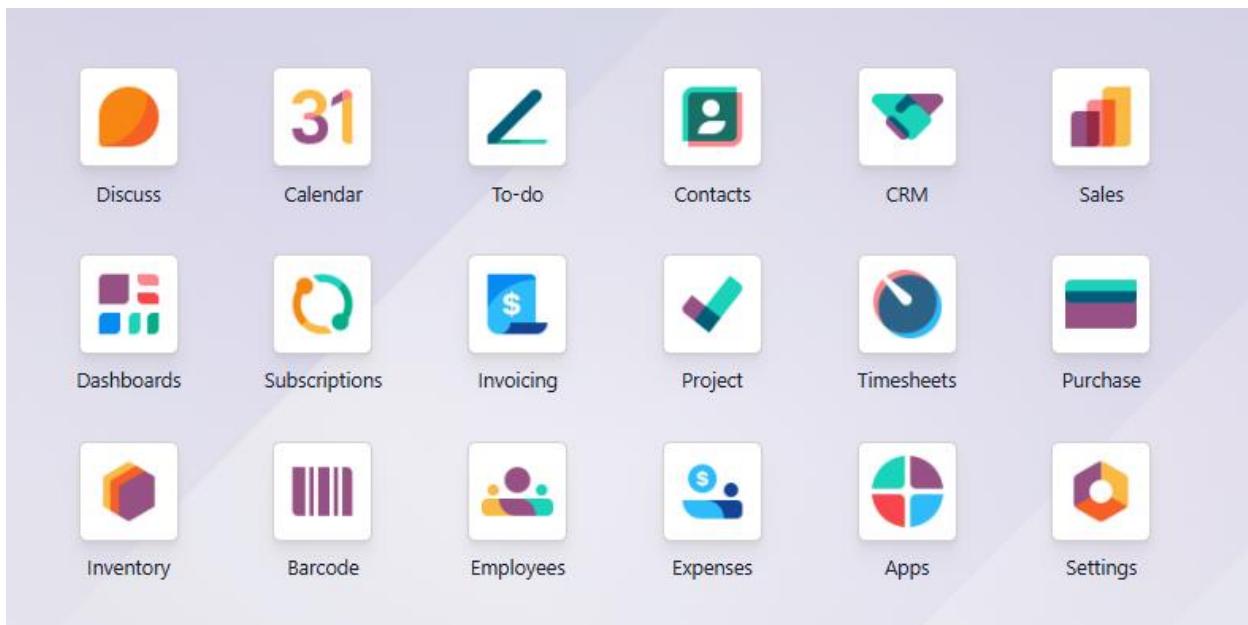
Premium subscription services

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

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New Products ⚙️

Search... Goods X 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

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New Products ⚙️

Search... Subscriptions X 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

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New Warehouses ⚙️

Search...

1-2 / 2 < >

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

The screenshot displays two separate configurations for warehouses within the Yodle platform.

**Warehouse Configuration for Greenleaf Electronics - Main Store:**

- Short Name:** MS
- Address:** New York
- SHIPMENTS**
  - Incoming Shipments:**  Receive and Store (1 step) (selected)
  - Receive then Store (2 steps)
  - Receive, Quality Control, then Store (3 steps)
- RESUPPLY**
  - Buy to Resupply:**
  - Resupply From:**  Greenleaf Electronics - Online Fulfillment

**Warehouse Configuration for Greenleaf Electronics - Online Fulfillment:**

- Short Name:** OF
- Address:** Union City
- SHIPMENTS**
  - Incoming Shipments:**  Receive and Store (1 step) (selected)
  - Receive then Store (2 steps)
  - Receive, Quality Control, then Store (3 steps)
- RESUPPLY**
  - Buy to Resupply:**
  - Resupply From:**  Greenleaf Electronics- Main Store

## 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.

The screenshot shows the Odoo Purchase Requests for Quotation dashboard. At the top, there are summary statistics: 0 New, 0 RFQ Sent, 0 Late RFQ, 2 Not Acknowledged (highlighted in blue), 0 Late Receipt, 67% OTD, and 0.00 Days to Order. Below this is a table listing three purchase orders:

	Reference	Vendor	Buyer	Order Deadline	Activities	Total	Status
<input type="checkbox"/>	P00003	ACT Manufacturing Inc	Ye Htut	Oct 6, 9:32 PM	<span>Open</span>	\$ 37,440.00	Purchase Order
<input type="checkbox"/>	P00002	John Smart Phone Ltd	Ye Htut	Oct 6, 9:32 PM	<span>Open</span>	\$ 6,000.00	Purchase Order
<input type="checkbox"/>	P00001	TechSource Ltd	Ye Htut	Oct 6, 9:32 PM	<span>Open</span>	\$ 20,900.00	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.

The screenshot shows the Odoo Request for Quotation form for P00003. The vendor is ACT Manufacturing Inc. The order deadline is Oct 6, 9:32 PM. The expected arrival is also Oct 6, 9:32 PM, with a note "No data yet". The currency is USD. The deliver to location is Greenleaf Electronics- Main Store: Receipts. The "Ask confirmation" checkbox is unchecked.

**Request for Quotation**  
P00003

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		Order Date:	Expected Arrival:		
Ye Htut		10/06/2025	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	Quantity To
Laptop - Microsoft Surface	20 MS/Stock
Laptop - ASUS Chromebook	30 MS/Stock
Laptop Model - Lenovo	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.

The screenshot shows a list of 10 quotations. The columns are: Number, Creation Date, Customer, Salesperson, Activities, Total, and Status. The status column includes icons for Sales Order, Sales Order (green), Quotation, Quotation (green), and Cancelled.

Number	Creation Date	Customer	Salesperson	Activities	Total	Status
500011	Sep 26, 8:32 PM	John Henry	Ye Htut	⌚	\$ 54.60	Sales Order
500013	Oct 6, 9:44 PM	James Doe	Ye Htut	⌚	\$ 767.04	Sales Order
500012	Sep 26, 8:41 PM	John Henry	Ye Htut	⌚	\$ 5.20	Sales Order
500010	Sep 26, 8:30 PM	John Henry	Ye Htut	📞 Call	\$ 93.60	Sales Order
500009	Sep 26, 8:28 PM	Alice Wang	Ye Htut	⌚	\$ 15.60	Sales Order
500007	Sep 26, 8:19 PM	John Henry	Ye Htut	⌚	\$ 46.80	Sales Order
500005	Sep 26, 8:11 PM	Alice Wang	Ye Htut	⌚	15.60 B	Quotation
500004	Sep 26, 8:01 PM	Alice Wang	Ye Htut	⌚	46.80 B	Quotation
500003	Sep 26, 7:55 PM	Alice Wang	Ye Htut	⌚	0.00 B	Cancelled
500001	Sep 25, 11:08 PM	John Henry	Ye Htut	⌚	4,004.00 B	Sales Order
						\$ 5,049.24 <sup>?</sup>

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

The screenshot shows a new quotation form. It has tabs for Send, Print, Confirm, and Preview. The main area shows a title 'New' and details for a customer named James Doe. It includes fields for Expiration (Nov 7), Recurring Plan, Pricelist (Default (USD)), and Payment Terms (Immediate). Below this is a table of order lines with columns for Product, Quantity, Unit Price, Taxes, Disc.%, and Amount.

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

Buttons at the bottom include Add a product, Add a section, Add a note, and Catalog.



Greenleaf Electronics  
New York NY United States

| James Doe

### Quotation # S00013

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

The screenshot shows a software interface for managing sales orders. On the left, a sidebar lists navigation options: Sales, Orders, To Invoice, Products, Reporting, and Configuration. The main area displays a Sales Order for Customer Invoice INV/2025/00006 (S00013). The order details include:

- Customer: James Doe
- Invoice Date: Oct 6
- Due Date: Oct 6
- Currency: USD

The order lines show the following items:

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

At the bottom, there are sections for Terms and Conditions and a summary of the total amount:

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

On the right side, there is a sidebar for messaging. It shows a list of messages from Ye Htut:

- Invoice validated (No → Yes (Reviewed))
- This journal entry has been created from: S00013
- Invoice Created



Greenleaf Electronics  
New York NY United States

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
	<b>Total</b>	<b>\$ 767.04</b>
	Paid on 10/06/2025	\$ 767.04
	Amount Due	\$ 0.00

Sales Orders To Invoice Products Reporting Configuration

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

S00013

Send Preview Cancel Quotation Quotation Sent Sales Order

Order Lines Other Info Notes

Product Quantity Delivered Invoiced Unit Price Taxes Disc.%

Customer James Doe Order Date Oct 6, 9:46 PM

Pricelist Default (USD)

Payment Terms Immediate

Ye Htut 9:50 PM Invoice INV/2025/00006 paid

Ye Htut 9:45 PM Quotation confirmed Quotation Sent → Sales Order (Status)

Ye Htut 9:45 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

Ye Htut 9:44 PM Sales 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.

**MS/OUT/00006**

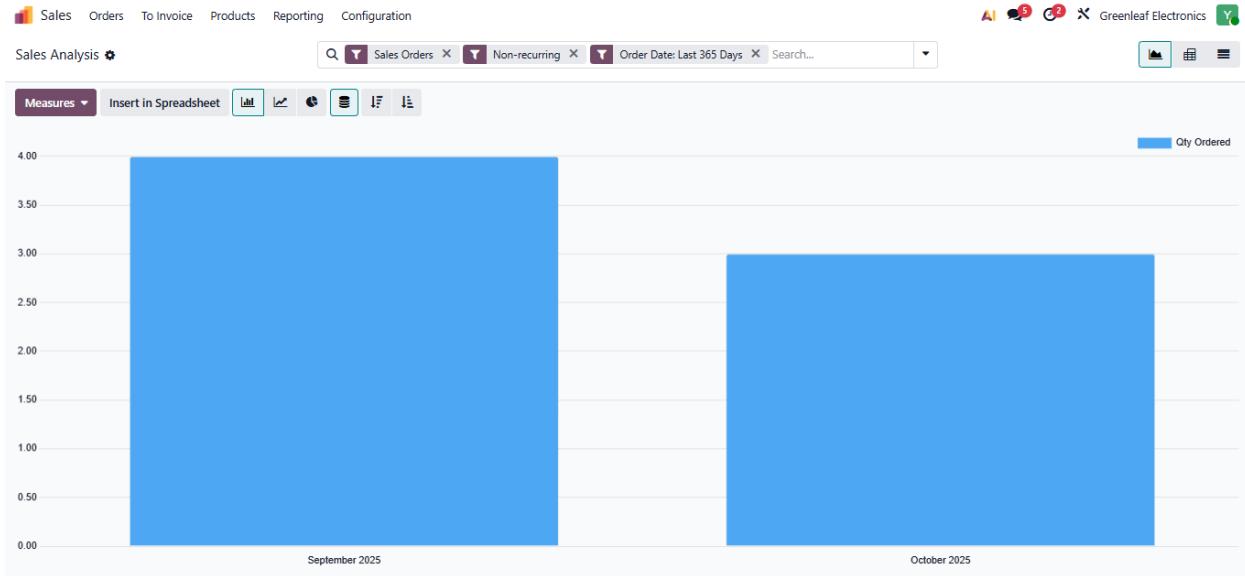
Delivery Address: James Doe  
Operation Type: Greenleaf Electronics - Main Store: Delivery Orders  
Source Location: MS/Stock

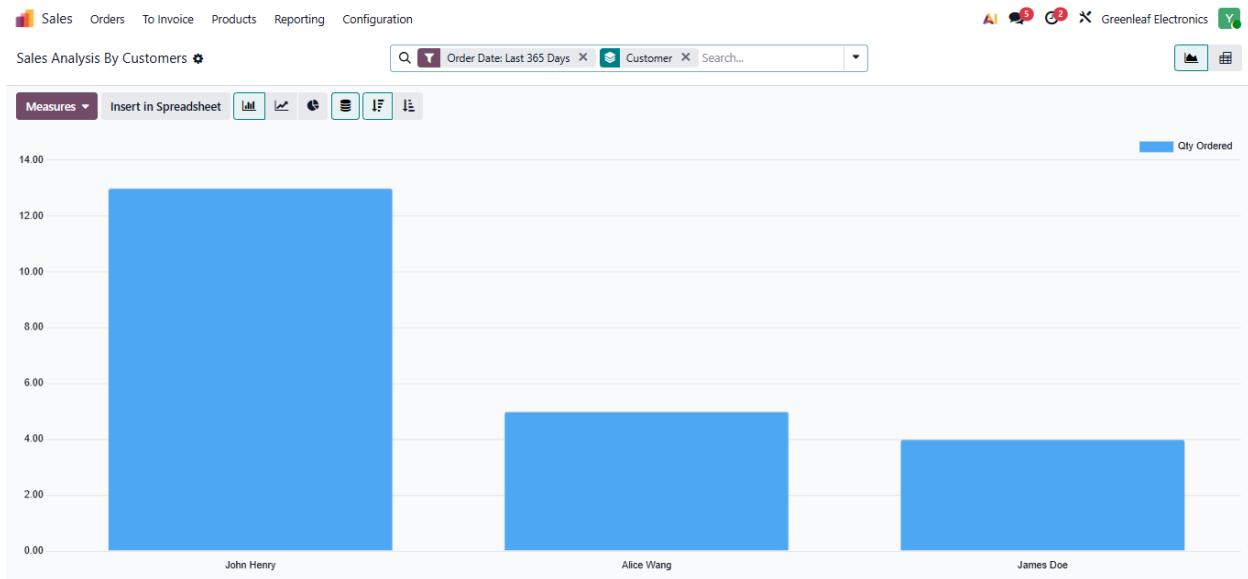
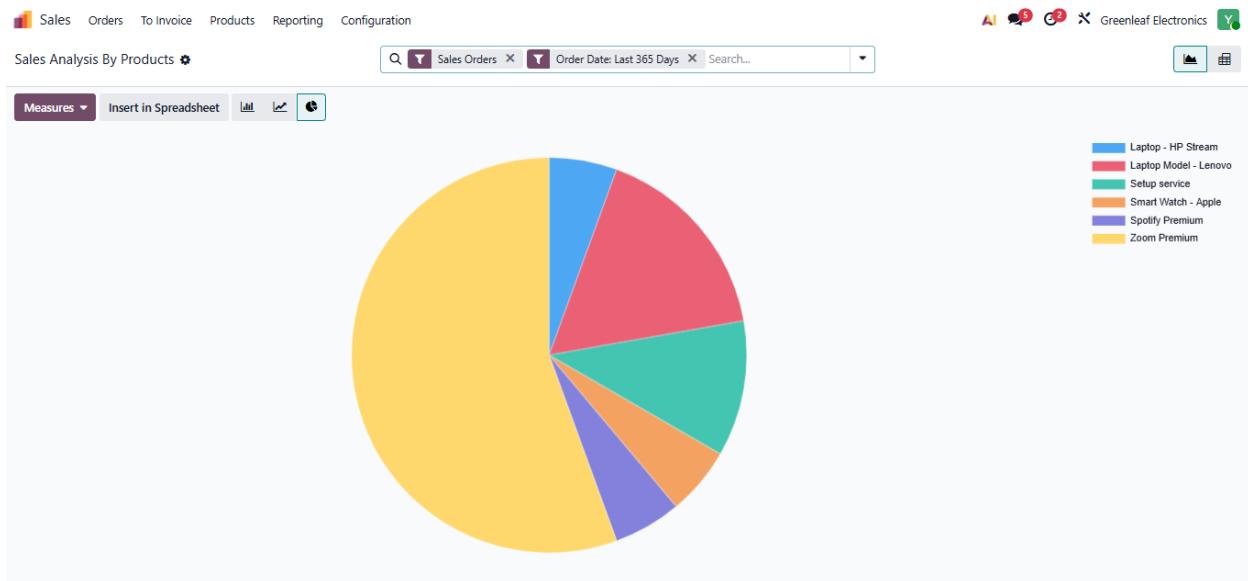
Scheduled Date: Oct 6, 9:46 PM  
Effective Date: Oct 6, 9:55 PM  
Source Document: S00013

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

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 the CRM Pipeline interface with four stages:

- New:** TechSource Ltd's opportunity - Laptops, smartwatches (\$2,400.00). Status: Y.
- Qualified:** ChatGPT plus permium \* 5 (\$100.00). Status: Y.
- Proposition:** John Henry - Lenovo laptop (\$5,000.00). Status: Y.
- Won:** Jersey Cindy - Tablet and premium services (\$101.00). Status: 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 the CRM Lead Detail page for "James Doe's opportunity - tablet, phone, premium s...".

**Lead Details:**

- 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
- Tags: [empty]

**Notes:** He is interested in tablet, phone, premium services.

**Activity Log:**

- 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 Pipeline / James Doe's opportunity - tablet, phone, premium services S00020

1 Projects 0 Tasks 1 Delivery

Create Invoice Send Preview Cancel Quotation Quotation Sent Sales Order

**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%	\$ 1,000.00
Zoom Premium	4.00	0.00	0.00	15.00	4%	\$ 60.00
<a href="#">Add a product</a> <a href="#">Add a section</a> <a href="#">Add a note</a> <a href="#">Catalog</a>						
				Discount		
				Untaxed Amount:	\$ 3,060.00	
				Tax 4%:	\$ 42.40	
Terms and conditions...						

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 notification



Greenleaf Electronics  
New York NY United States

James Doe

### Quotation # S00020

Quotation Date	Expiration	Salesperson		
10/06/2025	11/05/2025	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

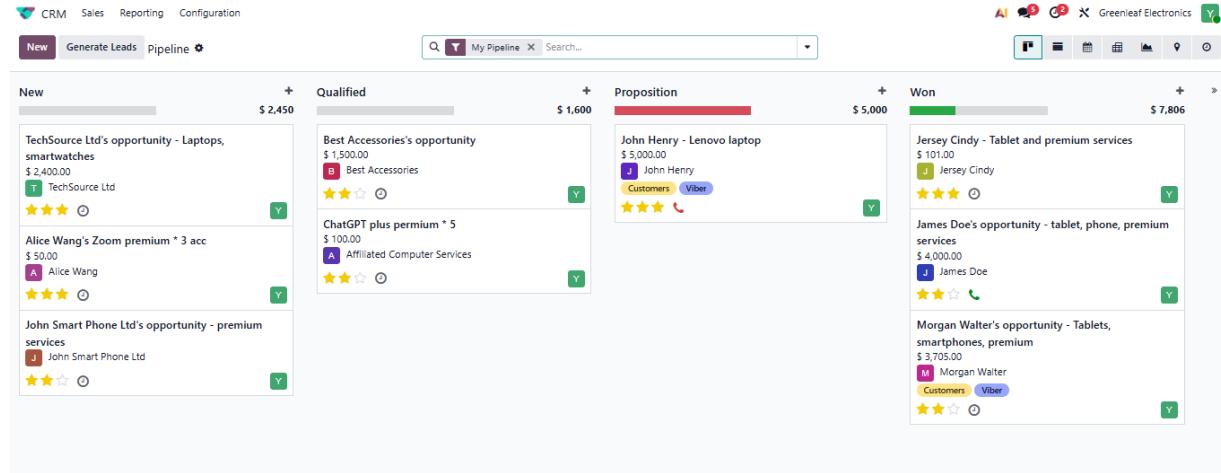


James Doe

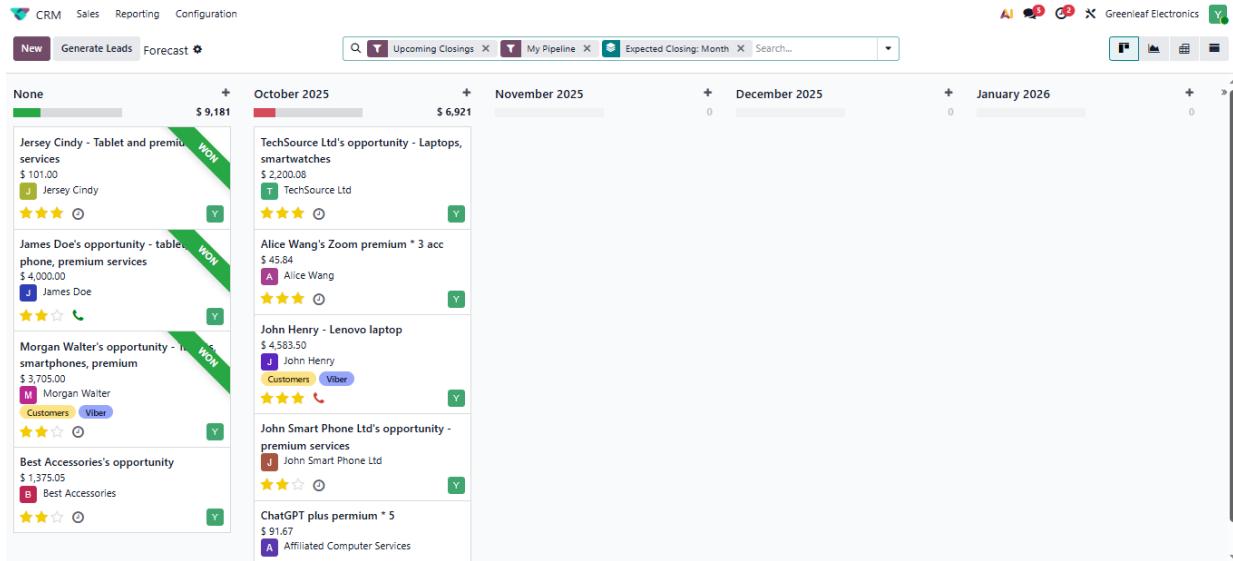
### Invoice INV/2025/00012

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
<hr/>				
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.



The screenshot shows a contacts list for the company "Greenleaf Electronics". The table includes columns for Name, Email, Phone, Activities, and Country. Each contact row has a status indicator at the end, such as "1 new notification".

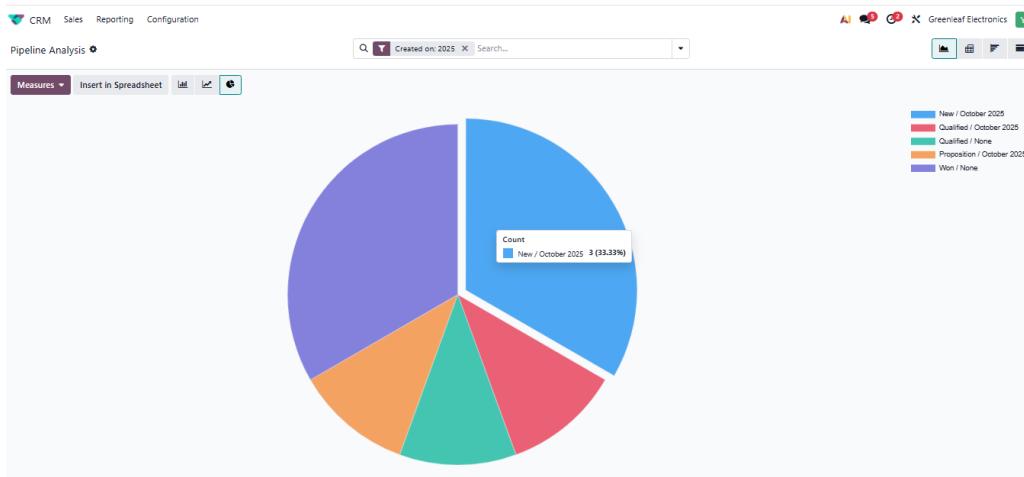
	Name	Email	Phone	Activities	Country	
<input type="checkbox"/>	ACT Manufacturing Inc	actmanufacturing@example.com	134525235	(1)	United States	<span>1</span>
<input type="checkbox"/>	Affiliated Computer Services	afcbservice@example.com	1453425463	(1)	United States	<span>1</span>
<input type="checkbox"/>	Alice Wang	alicewang@example.com	1323514	(1)	United States	<span>1</span> <span>1</span> <span>\$ 4</span>
<input type="checkbox"/>	Best Accessories	bestaccessories@example.com	123423	(1)	United States	<span>1</span>
<input type="checkbox"/>	Greenleaf Electronics	dryehut.1995@gmail.com		(1)	United States	
<input type="checkbox"/>	James Doe	jamesdoe@example.com	18585656	(1)		<span>2</span> <span>1</span> <span>\$ 2</span>
<input type="checkbox"/>	Jersey Cindy	jerseyc@example.com	18569646	(1)	United States	<span>1</span> <span>1</span> <span>\$ 3</span>
<input type="checkbox"/>	John Henry	johnhenry@example.com	1342343	(1)	United States	<span>6</span> <span>1</span> <span>\$ 5</span> <span>1</span>
<input type="checkbox"/>	John Smart Phone Ltd	johnsmartphone@example.com	126423254	(1)	United States	<span>1</span> <span>1</span>
<input type="checkbox"/>	Morgan Walter	morganwalter@example.com	15252367	(1)	United States	<span>2</span> <span>1</span> <span>\$ 2</span>
<input type="checkbox"/>	NC Computer	nccomputer@gmail.com	102395395	(1)	United States	
<input type="checkbox"/>	New York			(1)		
<input type="checkbox"/>	Peter Johnson	peter234@example.com	134543523	(1)	United States	
<input type="checkbox"/>	Sara Windy	sarawindy@example.com	157375754	(1)		<span>1 new notification</span>

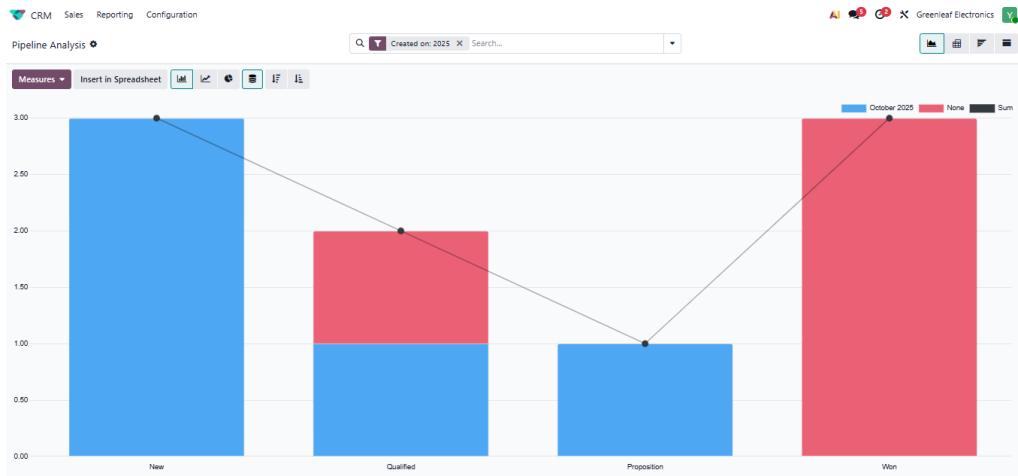
CRM Sales Reporting Configuration

My Pipeline Search... Pipeline

Total				
	New	Qualified	Proposition	Won
Expected Revenue				
Total	\$ 2,450.00	\$ 1,600.00	\$ 5,000.00	\$ 8,305.00
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
Sales	\$ 2,400.00	\$ 1,600.00		\$ 8,305.00
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.

The screenshot shows a list of contacts in a table format. Each row contains a checkbox, a color-coded icon, the contact's name, email, phone number, activities (represented by icons), and country. The contacts listed are:

	Name	Email	Phone	Activities	Country
<input type="checkbox"/>	ACT Manufacturing Inc	actmanufacturing@example.com	134525235	(1)	United States (1)
<input type="checkbox"/>	Affiliated Computer Services	afcsservice@example.com	1453425463	(1)	United States (1)
<input type="checkbox"/>	Alice Wang	alicewang@example.com	1323514	(1)	United States (1) ★1 \$4
<input type="checkbox"/>	Best Accessories	bestaccessories@example.com	123423	(1)	United States (1)
<input checked="" type="checkbox"/>	Greenleaf Electronics	dr.yehtut.1995@gmail.com		(1)	United States
<input type="checkbox"/>	James Doe	jamesdoe@example.com	18585656	(1)	(2) ★1 \$2
<input type="checkbox"/>	Jersey Cindy	jerseyc@example.com	18569646	(1)	United States (1) ★1 \$3
<input type="checkbox"/>	John Henry	johnhenry@example.com	1342343	(1)	United States (6) ★1 \$5 (1)
<input type="checkbox"/>	John Smart Phone Ltd	johnsmartphone@example.com	126423254	(1)	United States (1)
<input type="checkbox"/>	Morgan Walter	morganwalter@example.com	15252367	(1)	United States (2) ★1 \$2
<input type="checkbox"/>	NC Computer	nccomputer@gmail.com	102395395	(1)	United States
<input type="checkbox"/>	New York			(1)	
<input type="checkbox"/>	Peter Johnson	peter234@example.com	134543523	(1)	United States
<input type="checkbox"/>	Sara Windy	sarawindy@example.com	157375754	(1)	

The screenshot shows the Odoo Contacts module. At the top, there are navigation links for 'Contacts', 'Configuration', and a search bar. Below the header, there are quick access links for Opportunities, Sales, Invoiced, Subscriptions, Meetings, Tasks, and Purchases. The main content area displays a contact record for 'MSC Tech LTD'. The contact details include a logo (a blue square with a white 'M'), the company name 'MSC Tech LTD', an email address 'msctech@example.com', and a phone number '1352356'. Below this, there are fields for 'Address', 'Street...', 'Street 2...', 'Huston', 'State', 'ZIP', 'Tax ID', 'Website', and 'Tags' (B2B, Sales and business promotion activ...). Below the contact details, there are tabs for 'Contacts', 'Sales & Purchase', 'Invoicing', and 'Notes'. A button labeled 'Add Contact' is visible. On the right side, there is a sidebar titled 'Planned Activities' with two entries: 'Due in 2 days: "Call" for Ye Htut' and 'Due in 4 days: "MSC Tech LTD" for Ye Htut'. Below the activities, there are two log entries: 'Ye Htut 11:47 PM assign customer contact to project assistant' and '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.

The screenshot shows the Odoo Subscriptions module. At the top, there are navigation links for 'Subscriptions', 'Products', 'Reporting', and 'Configuration'. Below the header, there is a search bar and a toolbar with various icons. The main content area displays a list of subscriptions. The columns include 'Number', 'Customer', 'Next Invoic\*', 'Salesperson', 'Activities', 'Recurring', 'Recurring Plan', and 'Subscription Status'. There are three entries in the list:

Number	Customer	Next Invoic*	Salesperson	Activities	Recurring	Recurring Plan	Subscription Status
S00010	John Henry	Nov 1	Ye Htut	Call	\$ 90.00	Monthly	In Progress
S00015	Jersey Cindy	Nov 1	Ye Htut	Call	\$ 20.00	Monthly	In Progress
S00014	Jersey Cindy	Nov 1	Ye Htut	Call	\$ 15.00	Monthly	In Progress

S00015

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**

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

**Planned Activities**

- Due in 7 days: "To-Do" for Ye Htut
- Follow up - Mark Done, Edit, Cancel

**Activity**

- 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.

S00022

Customer: Jersey Cindy, Washington, United States

Expiration: Nov 6

Recurring Plan: Monthly

Pricelist: Default (USD)

Payment Terms: Immediate

**Upsell**

**Order Lines**

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

**Activity**

- 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

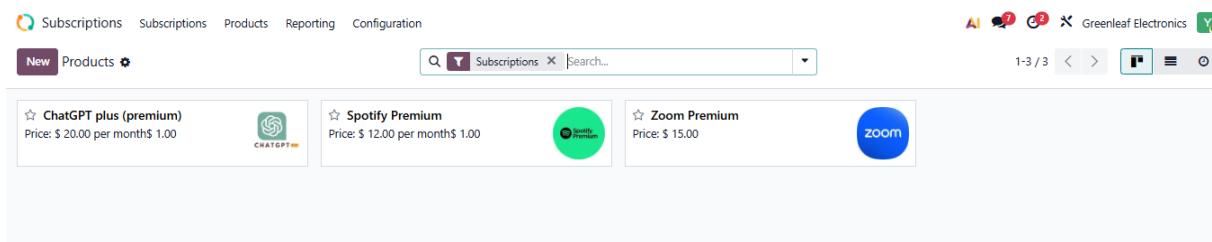
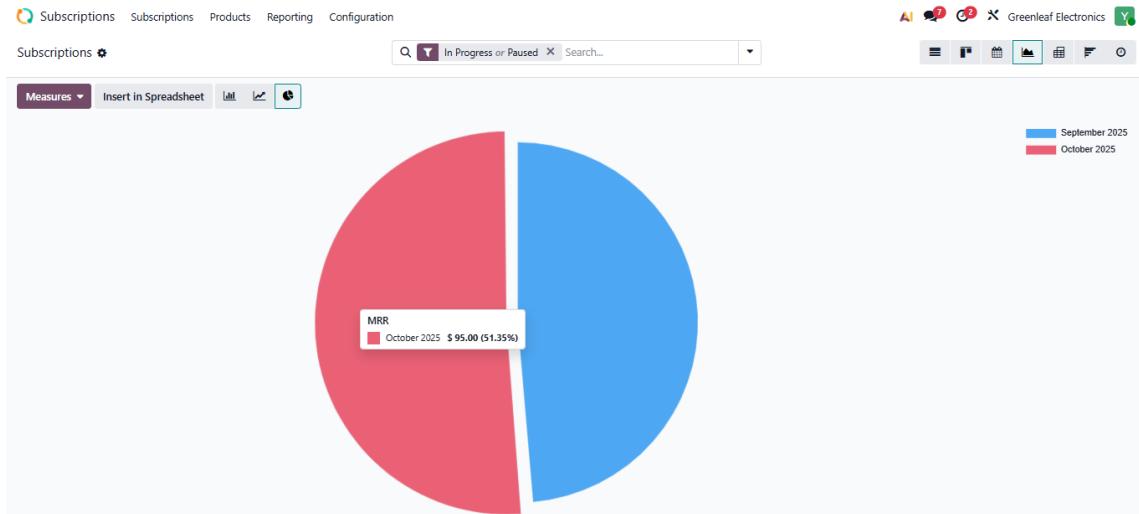
The screenshot shows the Odoo Subscriptions module interface. On the left, a customer invoice for 'INV/2025/00015' is displayed. It's a 'Customer Invoice' for Jersey Cindy, Washington, United States. The invoice date is Oct 7, due date is Oct 7, and currency is USD. A green diagonal banner across the invoice area says 'PAID'. Below the invoice, there's a table for 'Invoice Lines' showing one item: 'ChatGPT plus (premium)' at 3.00 units, 20.00 price, and 4% tax, totaling \$60.00. A note below states: '(\*) These recurring products are discounted according to the prorated period from 10/07/2025 to 10/31/2025'. On the right, a detailed view of the invoice is shown, including the header 'Invoice INV/2025/00015', payment communication information, and a breakdown of taxes and totals.

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

The screenshot shows a Kanban view of subscription history for customer S00010. The table has columns for Number, Customer, Salesperson, Activities, Recurring, Recurring Plan, Total, and Subscription Status. There are three entries: S00012 (John Henry, Ye Htut, Call, \$5.00 Monthly, \$5.20, Upsell), S00011 (John Henry, Ye Htut, Call, \$52.50 Monthly, \$54.60, Upsell), and S00010 (John Henry, Ye Htut, Call, \$90.00 Monthly, \$93.60, In Progress). The status 'UpSell' is highlighted in red.

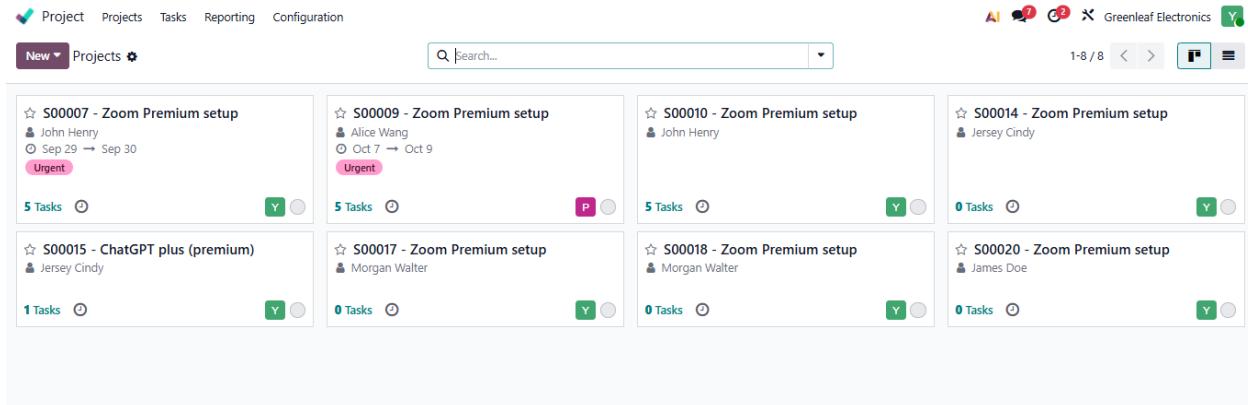
The Subscriptions module offers a Kanban view to monitor the progress and status of each subscription. Analytical charts and graphs provide visual insights into subscription performance, recurring revenue, and upsell effectiveness, supporting data-driven decision-making.

The screenshot shows a Kanban view of active subscriptions. The board has two columns: 'In Progress' and 'Paused'. Under 'In Progress', there are three cards: Jersey Cindy (S00014, \$15.00 Monthly, In Progress), Jersey Cindy (S00015, \$80.00 Monthly, In Progress), and John Henry (S00010, \$90.00 Monthly, In Progress). Under 'Paused', there are zero cards. Each card includes a star icon, a phone icon, and a green circle with a white 'Y'.



## 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.



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 shows a project management interface. On the left, a task card for "Task 1 - customer consultation, requirement gathering" is displayed, categorized under "Sales Order". The card includes details like Project (S00009 - Zoom Premium setup), Assignees (Kim Edward), Tags (Urgent), Customer (Alice Wang), Sales Order Item (S00009 - Zoom Premium (Alice Wang)), Deadline (Oct 8, 9:00 PM), and Allocated Time (05:00 (40%)). Below the card is a table for Timesheets and Sub-tasks. On the right, a detailed activity log for the task is shown, listing messages from Ye Htut, including assigning the task to Kim Edward, setting a deadline, and marking it as created.

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. The To Do column has one task: "Task 4 - Make payment to Zoom" (Alice Wang, Tomorrow, Priority 1, 01:00). The In Progress column has two tasks: "Task 2 - Contact Zoom for premium services" (Alice Wang, Tomorrow, Priority 2, 02:00) and "Task 3 - Create zoom premium account with user email" (Alice Wang, Tomorrow, Priority 2, 01:00). The Done column has one task: "Task 1 - Customer Consultation, Requirement gathering" (Alice Wang, Priority 3, 02:00). The Cancelled column has zero tasks.

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

Attach Receipt Submit Split Expense Draft Approved Posted Paid Send message Log note Activity 1 / 1 < >

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...

Ye Htut 9:18 PM Expense created

Project Projects Tasks Reporting Configuration

New ... / Expenses / Phone Bill BILL/2025/10/0001 (Phone Bill)

Print Pay Reset to Draft Draft Posted Send message Log note Activity 1 / 1 < >

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

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)

Print Reset to Draft Draft Posted Send message Log note Activity 1 / 1 < >

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

PAID

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

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

The screenshot shows the Odoo Project app interface. At the top, there are tabs for Project, Projects, Tasks, Reporting, and Configuration. Below the tabs, there are buttons for Upload, New, Projects, and Expenses. The main area displays a list of expenses. The columns include Employee, Description, Expense Date, Category, Paid By, Activities, Total, and Status. One expense is listed: Kim Edward, Phone Bill, Oct 7, [EXP\_GEN] Expenses, Employee (to reimburse), \$ 1.50, Paid. On the left sidebar, there are filters for STATUS (Draft, Submitted, Approved, Posted, In Payment, Paid, Refused) and 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.

The screenshot shows the Odoo Purchase Orders screen. A new purchase order P00004 is being created. The details include Vendor: Zoom Company, Order Deadline: Oct 7, 9:25 PM, Expected Arrival: Oct 7, 9:25 PM, No data yet, Ask confirmation checked, Deliver To: Greenleaf Electronics- Main Store: Receipts. The products section lists Zoom Premium with a quantity of 1.00, Unit: Units, Unit Price: 8.00, Taxes: 4%, and Amount: \$ 8.00. The message history on the right shows an RFQ sent to Zoom Company at 9:27 PM, with a subject: "Subject: Greenleaf Electronics Order (Ref P00004)". The message body asks for a request for quotation and ends with "Best regards, ...". A file attachment for "Request for Quotat..." is shown. A notification at the bottom right says "Purchase Order created".



Greenleaf Electronics  
New York NY United States

**Shipping address**  
Greenleaf Electronics- Main Store

Zoom Company

## Purchase Order #P00004

Buyer	Order Date:	Expected Arrival:
Ye Htut	10/07/2025	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:**

The screenshot shows the Project management software interface with the following details:

- Top Navigation:** Project, Projects, Tasks, Reporting, Configuration.
- Header:** AI, 🔍, G2, X, Greenleaf Electronics, Y.
- Sub-Header:** New, Projects, Purchase Orders.
- Search Bar:** Search... (with a dropdown arrow).
- Toolbar:** Tasks, Sales Orders, Purchase Orders (highlighted), Expenses, etc.
- Table:**

	Reference	Confirmation Date	Vendor	Next Activity	Buyer	Total Status	Expected Arrival
□	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... AI 🤖 ⚡ 🔍 ✎

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

### Profitability

Revenues	Expected	To Invoice	Invoiced
► Timesheets (Fixed Price)	\$ 15	\$ 0	\$ 15
<b>Total Revenues</b>	<b>\$ 15</b>	<b>\$ 0</b>	<b>\$ 15</b>
Costs	Expected	To Bill	Billed
Purchase Orders	\$ -8	\$ -8	\$ 0
Expenses	\$ -2	\$ 0	\$ -2
<b>Total Costs</b>	<b>\$ -10</b>	<b>\$ -8</b>	<b>\$ -2</b>
Total	\$ 6 +37%	\$ -8	\$ 14 +90%

**No updates found. Let's create one!**

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

Project Projects Tasks Reporting Configuration

New Projects S00009 - Zoom Premium setup Dashboard

Search... AI 🤖 ⚡ 🔍 ✎

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

### Profitability

Revenues	Expected	To Invoice	Invoiced
► Timesheets (Fixed Price)	\$ 15	\$ 0	\$ 15
<b>Total Revenues</b>	<b>\$ 15</b>	<b>\$ 0</b>	<b>\$ 15</b>
Costs	Expected	To Bill	Billed
Purchase Orders	\$ -8	\$ -8	\$ 0
Expenses	\$ -2	\$ 0	\$ -2
<b>Total Costs</b>	<b>\$ -10</b>	<b>\$ -8</b>	<b>\$ -2</b>
Total	\$ 6 +37%	\$ -8	\$ 14 +90%

**No updates found. Let's create one!**

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

## 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.

The image displays two screenshots of the Odoo Timesheets module. The top screenshot shows a weekly view from Sunday, Oct 5 to Saturday, Oct 11. It lists four employees: James Doe, Kim Edward, Sara Windy, and Ye Htut. Each employee has a log of activities. For example, James Doe worked on 'S00009 - Zoom Premium setup' for 4 hours on Tuesday. The bottom screenshot shows a detailed view for Ye Htut on Tuesday, Oct 7. She has three entries: 'Internal' at 0:15, 'Meeting' at 0:15, and a total of 0:30 for the day. A sidebar on the left shows activity categories: Internal, Meeting, Training, and Add a line.

## 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.