

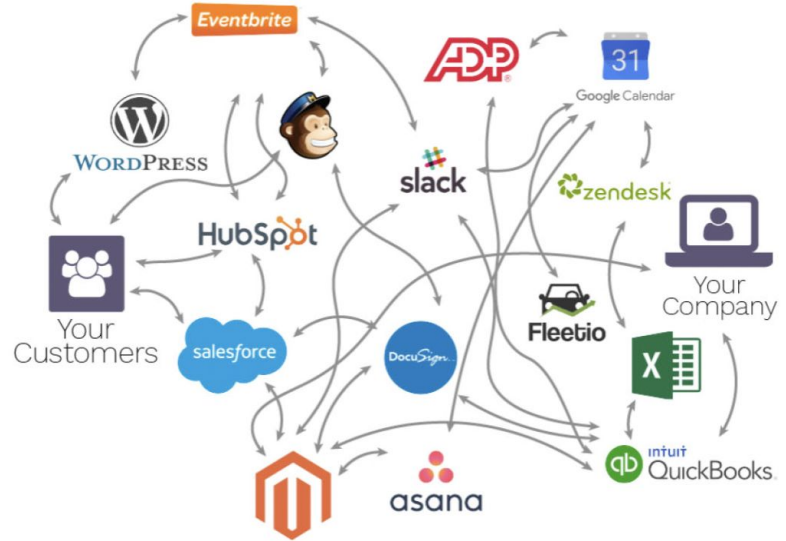
**LOGO GOES HERE**

ERP Software Implementation



# Problem:

Majority of the businesses use a bunch of single-purpose applications which are neither designed, nor correctly integrated to work well together and serve business needs efficiently.



## As a result:

- Top Management cannot see a proper business overview.
- There is a lack of transparency on both individual and team performances and KPIs.
- Simple day-to-day tasks, like logging time or issuing invoices are delayed due to over-complication and non-automation.
- Communication and sharing of data between departments is unsafe and inefficient.
- Delays and lack of transparency equals to loss of opportunities and potential revenues.

# Solution:

All-in-one ERP software,  
strategically implemented to  
serve all your business needs.





# Scalable ERP implementation solutions

Which can serve company from the first steps and scale together as the business grows.

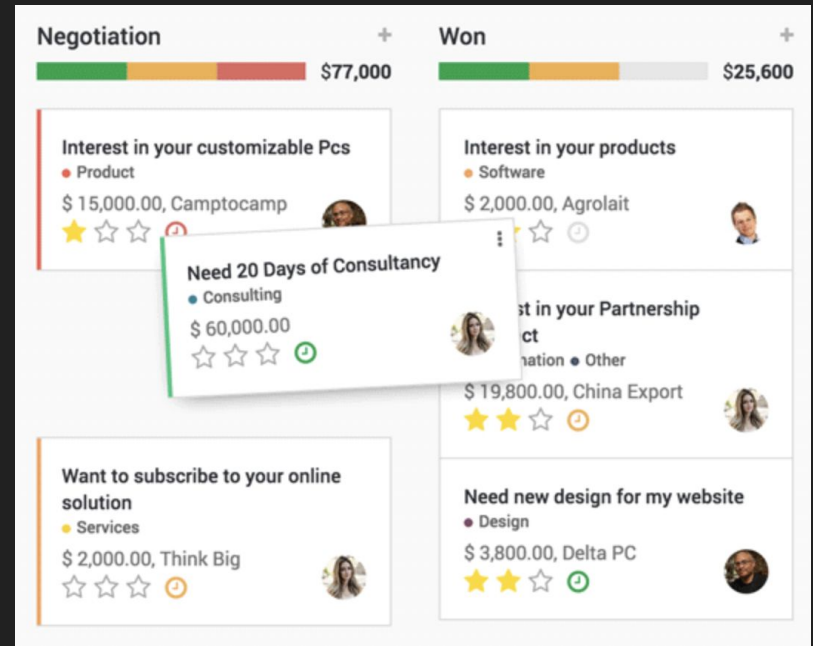
1. Sales CRM & Project Management
2. Marketing CRM & Automation
3. Warehouse & Procurement
4. Manufacturing
5. Accounting
6. HR & Talent Acquisition
  
7. GAP Analysis for medium and large scope projects

All solutions can work separately or seamlessly integrated together.

# 1. Sales CRM & Projects

- Leads and Sale Opportunities Pipeline
- KPIs and Performance Tracker
- Quotation and Sales Order generator
- Project Management & real-time timesheet log
- Automated Invoicing

Additionally available: Field Service, Helpdesk, Appointments, Planning, Subscriptions, Rentals, eCommerce, Basic Accounting with bank sync and HMRC & VAT returns.



# Leads & Sale Opportunities Pipeline

Kanban view with clear pipeline, potential sales, planned and overdue activities and more.

The image displays a CRM interface with a Kanban pipeline view. The main view shows four stages: New, Qualified, Proposition, and Negotiation. Each stage has a progress bar and a total value. Below the stages are cards representing individual leads or opportunities, each with a title, category, value, and status indicators (stars and a clock).

**CRM Pipeline Overview:**

- New:** \$69,600
- Qualified:** \$61,000
- Proposition:** \$24,500
- Negotiation:** \$15,000

**Opportunity Details: Plan to buy RedHat servers**

- Expected Revenue: \$25,000.00
- Probability: at 30
- Customer: Agrolait
- Email: virginie@agrolait.com
- Phone: +32 10 888 558
- Activity State: No next activity planned
- Salesperson: Europe
- Internal Notes: \$2,000.00
- Geolocation: ( 0.00000, 0.00000)
- Assigned Partner: Camptocamp

**Task Details: Projects / Tasks / Room 1: Decoration**

- Notes:
  - By YourCompany, Mitchell Admin - now: Kanban State Label: Buzz or set as done → In Progress
  - By YourCompany, Mitchell Admin - 1 day ago: Assigned to: Mitchell Admin → Joel Willis
  - By YourCompany, Mitchell Admin - 2 days ago: Hello, Joel Williams.
- Activity: Today: "Call to get system requirements" for Administrator

# KPIs and Performance Tracker

Fully flexible KPI and Performance tracking solution, allowing to track both individual and team efforts.

## Monthly Sales Targets

Match records with the following rule:

Groups in 28

→ 10 RECORD(S)

Chris Dyna Jim John Kevin Logan Robin Scott Sharon Valerie

Periodicity Monthly  
Display Mode Leader Board (Group Ranking)

Responsible OdooBot  
Start Date  
End Date

Goals Reward Advanced Options

Goal Definition	Goal Performance	Target Value to Reach
Total Invoiced	The higher the better	20,000

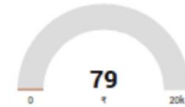
### Total Invoiced



Mitchell Admin

#### Total Invoiced

Current Value



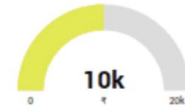
From 07/01/2019 To 07/31/2019



Marc Demo

#### Total Invoiced

Current Value



From 07/01/2019 To 07/31/2019

# Quotations & Sales Orders Generator

Easy to use generator with online user portal, pdf and email templates and all communication history.

[Accept Order](#)

[Ask Changes or Reject](#)

Introduction

Your Quotation SO067

Our Partnership Offer

Online Training + Certification

Technical Training

**Pricing**

Suggested Products

History

**This offer expires in**

45 days

Your advantage:

**\$ 11,655.00** ~~\$ 12,950.00~~

## Quotation SO051

[Edit Quote](#) [Print](#)

Products	Quantity	Taxes	Discount	Unit Price	Price
Functional Training	1.000 Unit(s)		10.0% discount	\$-12,950.00 11655.00	\$ 11,655.00
Technical Training	1.000 Unit(s)			\$ 0.00	\$ 0.00
<b>Subtotal:</b>					<b>\$ 11,655.00</b>
Taxes:					\$ 0.00
<b>Total:</b>					<b>\$ 11,655.00</b>

### Suggested Products

Products	Description	Price
Advanced CRM Functional	Advanced CRM Functional	10% discount <del>\$ 9,000.00</del> 8100.00

[Accept](#) [Feedback](#) [Reject](#)

1 / 1 < >

QUOTATION > QUOTATION SENT > SALES ORDER

Project Overview

1 Tasks

01:00 Hours Recorded

12/30/2019 11:46:57

End of Following Month

Order Lines | Other Info

Product	Description	Quantity	Delivered	Invoiced	UoM	Unit Price	Taxes	Subtotal
Service on Timesheet	Service on Timesheet	1.000	1.000	0.000	Hours	40.00	Tax 15.00%	\$ 40.00

# Projects and Timesheet

Fully integrated with Sales and Invoicing, Projects and Timesheet is a solution to manage both commercial and internal company's projects.

The screenshot displays the Project and Timesheet software interface, which is fully integrated with Sales and Invoicing. The interface is divided into several main sections:

- Tasks Table:** A table listing various tasks with columns for Title, Project, Planned Hours, Hours Spent, Remaining Hours, Progress, and Stage. The tasks include:

Title	Project	Planned Hours	Hours Spent	Remaining Hours	Progress	Stage
Filter replacement	Field Service	01:00	00:45	00:15	75% Done	
Bathroom ventilation	Field Service	01:30	01:30	00:00	100% Done	
Water Heater	Field Service	02:00	02:00	00:00	100% New	
Fix sink	Field Service					
3-port Valve replacement	Field Service					
Noise Reduction	Office Design					
Install air extractor	Field Service					
Two radiators installation	Field Service					
Energy Certificate	Office Design					
User interface improvements	Research & Development					
Room 2: Decoration	Office Design					
Planning and budget	Research & Development					
Room 1: Decoration	Office Design					
- Calendar:** A calendar view showing tasks scheduled across days from Tuesday to Saturday. Tasks include "Noise Reduction", "Lunch Room: kitchen", "Meeting Room Furniture", "Room 2: Decoration", and "Modifications asked by the c".
- Task Details:** A detailed view of the "Room 2: Decoration" task, showing customer information (Acetate #00000, 181 Black 148 Street, Puyang Pui Road, 2100 Shanghai, Shanghai), contact details, and a sales order item with a deadline of 06/16/2020.
- Task List:** A list of tasks with status indicators (e.g., "Meeting Room Furniture" with 14:00, "Energy Certificate" with 24:00, "Room 2: Decoration" with 09:00, "Lunch Room: kitchen" with 05/06/2020, "Black Chairs for managers" with 05/19/2020).
- Today (11:15):** A summary of tasks for the current day, including "Nova Ltd. Meeting with client" (01:30), "Data Import/Export PL... Flow review" (05:30), "Research & Developm... New portal system" (02:30), and "Website for Sales & ... Develop module for S..." (01:45).

# Invoicing

Fully integrated with Sales Order Generator, invoicing empowers to issue invoices automatically as soon as products are delivered, time is logged or project is finished.

The screenshot shows the Odoo Accounting interface for an invoice. The header includes navigation tabs like Overview, Customers, Vendors, Accounting, Reporting, and Configuration. The main content area displays the invoice number 'INV/2019/0004' and various action buttons such as 'SEND & PRINT', 'REGISTER PAYMENT', 'ADD CREDIT NOTE', and 'PREVIEW'. The invoice details are organized into sections: Customer (Deco Addict), Invoice Date (01/13/2019), Due Date (01/13/2019), Salesperson (Marc Demo), and Sales Team (Europe). A table lists the invoice lines with columns for Product, Description, Account, Deferred Revenue, Quantity, Price, Disc (%), Taxes, and Subtotal. The total amount due is \$4,610.00.

Product	Description	Account	Deferred Revenue	Quantity	Price	Disc (%)	Taxes	Subtotal
[FURN_6741] Large Meeting Table	[FURN_6741] Large Meeting Table	200000 Product Sales		5.000	642.00	0.00		\$ 3,210.00
[FURN_8220] Four Person Desk	[FURN_8220] Four Person Desk	200000 Product Sales		5.000	280.00	0.00		\$ 1,400.00

Untaxed Amount: \$ 4,610.00  
Tax: \$ 0.00  
Total: \$ 4,610.00  
Amount Due: \$ 4,610.00

The screenshot shows a list of invoices in the Odoo Accounting interface. The header includes 'Group By' and 'Favorites' options. The main content area displays a large blue banner with the text 'Create Invoice' and 'Create your first invoice.' Below the banner is a table with columns for Company, Tax Excluded, Total, Status, and Payment Status. The table lists four invoices, all with a 'Posted' status and 'Not Paid' payment status. The total tax excluded is 907,500.00 and the total amount is 1,043,625.00.

Company	Tax Excluded	Total	Status	Payment Status
Demo Company	\$ 125,000.00	\$ 143,750.00	Posted	Not Paid
Demo Company	\$ 147,500.00	\$ 169,625.00	Posted	Not Paid
Demo Company	\$ 317,500.00	\$ 365,125.00	Posted	Not Paid
Demo Company	\$ 317,500.00	\$ 365,125.00	Posted	Not Paid
	907,500.00	1,043,625.00		

INV/2021/05/0001 Deco Addict 05/25/2021 15 days ago

# Sales CRM & Projects Implementation

- Sales & Project Business Process Chart Preparation
- Sales & Project Teams & Pipelines Setup
- Sales KPIs and Goals Setup
- Automated Actions (in accordance to Process Chart) Setup
- Project & Timesheets Setup (where applicable)
- 4 hours Training & Post-launch Consultations

Timeframe: 1 week

Implementation Cost\*: £1950.00 + VAT

Enterprise Software Cost\*\*: €70.00 / month + €22.50 / User / Month

Open-source Software Cost\*\*: £60.00 / month for hosting only

\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.

\*\* - Solution is available both in open-source and enterprise software options.



## 2. Marketing CRM & Automation

- Centralized Social Media Streams
- Email Marketing
- SMS Marketing
- Marketing Automation
- Surveys

Additionally available: Online and on-site events, eLearning, Blog, Forum

The screenshot displays a CRM interface for a contact named Michel Fletcher Agrolait. At the top, it shows the contact's name and a 'Workflow Started On' timestamp of 10/11/2017 15:29:08. To the right, there are labels for 'Campaign Object' and 'Partnership Off Contact'. The main section is titled 'Workflow' and features a vertical timeline of five steps:

- 09/28/2017 15:29:09**: 'Offer free trial' (Email) - PROCESSED. Includes sub-statuses: OPENED, CLICKED, REPLIED, BOUNCED.
- 10/05/2017 15:29:09**: 'After 7 days (if not partner yet)' (Email) - PROCESSED. Includes sub-statuses: OPENED, CLICKED, REPLIED, BOUNCED.
- 10/05/2017 14:29:09**: 'Message for sales person' (Server Action) - PROCESSED.
- 10/11/2017 16:29:09**: 'Offer free trial' (Email) - SCHEDULED. Includes a play button icon.
- 10/18/2017 15:29:09**: 'After 7 days (if not partner yet)' (Email) - SCHEDULED. Includes a play button icon.

# Centralized Social Media Streams

All your social media in one place, including Facebook, Instagram, Youtube and Twitter

Feed My Streams x By Stream x Search...

ADD A STREAM NEW POST SYNCHRONIZE Filters Group By Favorites

**f** Stealthy Wood Insights **t** Stealthy Wood Insights

345 -12% 532 -5% 35 -0% 290 -18% 127 -32% 18 -0%

**f** Page Posts: Stealthy Wood **t** Tweets of: Stealthy Wood **t** Keyword: #odoo **t** Tweets of: Odoo

**f** Stealthy Wood 11/19/2019  
Sales on Wooden Desk!  
24 8 15 Shares 44 Views

**f** Stealthy Wood 11/07/2019  
Working from home never looked this good  
Homemade furniture.  
19 2 17 Shares 82 Views

**f** Stealthy Wood 11/05/2019  
Colors are also welcome. They bring life and

**t** Stealthy Wood 11/14/2019  
We're in love with what could be the most modern couch!  
8 2 4 Retweets

**t** Stealthy Wood 11/12/2019  
You don't get a second chance at making a good first impression. Lobby idea  
Homemade furniture.  
1 4 4 Retweets

**t** Anita Oliver 11/20/2019  
Branded T-shirts: Use Case #Odoo Use Cases  
<https://t.co/fYWSna3imU>  
7 14 4 Retweets

**t** Ronie Hart 2 hours  
Odoo R&D peek - Ask your customers to sign your delivery orders ! #odoo PS: it works also in mobile  
2 3 2 Retweets

**t** Mitchell 4dmin 07/10/2019

**Odoo**  
Montreal, join us De  
make your business  
efficiently. #Odoo  
12 2

**Odoo**  
Our final day here is  
#OdooConnect with  
what's next for Odoo  
Nov. 7th  
9am

Your Post

Post on  [Push Notifications] My Website  [Facebook] Stealthy Wood  [Twitter] Stealthy Wood



Message


Attach Images

Campaign

When

Scheduled post date

**Facebook Page**  
Published by Facebook Page • 2019-12-09 13:00:00 •   
You don't get a second chance at making a good first impression. Homemade furniture. Lobby idea  
#stealthywood #furniture #comfort #design  


**Twitter Account** @twitteraccount - 11m  
You don't get a second chance at making a good first impression. Homemade furniture. Lobby idea  
#stealthywood #furniture #comfort #design  


# Email Marketing

Run your marketing campaigns directly from your ERP system. Fully integrated with other applications, including Sales, Invoicing and CRM

6 Emails Sent   71% Received   71% Opened   28% Replied   0% Clicks   14% Bounced   Active

TEST MAILING   SEND TO ALL   DRAFT   IN QUEUE   SENDING   SENT

From: MyCompany <newsletter@mycompany.com>  
Subject: \_\_\_\_\_  
Recipients:  Applicants  Leads / Opportunities  Customers  Mailing List  
50 selected records [CHANGE SELECTION](#)

MAIL BODY   OPTIONS

Change Style   B   I   U   14   A

**Headers**

- Left Logo:
- Left Text:
- Centered Logo:
- Banner:
- Body:
- Title Content:
- Title - Subtitle:

**Link Tracker**

URL:

Campaign:

Medium:

Source:

[Get tracked link](#)

**Preview:** Your Logo, New Arrivals, DISCOVER

# SMS Marketing

Run your SMS marketing campaigns directly from your ERP system. Fully integrated with other applications, including Sales, Invoicing and CRM

SMS Marketing / XMas Promo

EDIT CREATE Action 2 / 3 < >

TEST RETRY DRAFT IN QUEUE SENDING SENT

2 SMS Text Message could not be sent.

8 Leads 0 Quotations 0 Invoiced 60 Sent 57% Received 10% Clicked 14% Bounced

**Subject** XMas Promo  
**Recipients** Contact  
Match records with the following rule:  
**Related Company = 12**  
→ 70 RECORD(S)

**Subject** Discount  
**Recipients** Mailing Contact  
Match records with ALL of the following rules:  
Country > Country Name  
Mailing Lists

SMS Content Settings

Receive discounts on tasty lunch specials. Text "LUNCH" to 07 734 35 55 and g

114 characters, fits in 2 SMS (UNICODE) i

Link Tracker / Xmas Promo

**Xmas Promo**

Original URL	<a href="http://www.mywebsite.com/xmas-promo">http://www.mywebsite.com/xmas-promo</a>	Campaign	XMas Promo
Tracked Link	<a href="http://www.mywebsite.com/i/SXD6XD">http://www.mywebsite.com/i/SXD6XD</a> copy	Medium	SMS
Redirected URL	<a href="http://www.mywebsite.com/xmas-promo?utm_campaign=XMas+Promo&amp;utm_medium=SMS">http://www.mywebsite.com/xmas-promo?utm_campaign=XMas+Promo&amp;utm_medium=SMS</a>		

**Statistics**

40 clicks # of clicks

Date	# of clicks
2019-10-21	40
2019-10-22	0
2019-10-23	10
2019-10-24	0

2 countries

Country	Count
Belgium	30
Undefined	1

# Marketing Automation

Design, test and manage marketing funnels in 1 place. Fully integrated with all other applications of your business.

## Agrolait, Michel Fletcher

Workflow Started On 10/11/2017 15:29:08

Campaign Object Partnership Contact

### Workflow

- 09/28/2017 15:29:09 **Offer free trial** Email  
PROCESSED  
OPENED CLICKED REPLIED BOUNCED
- 10/05/2017 15:29:09 **After 7 days (if not partner yet)** Email  
PROCESSED  
OPENED CLICKED REPLIED BOUNCED
- 10/05/2017 14:29:09 **Message for sales person** Server Action  
PROCESSED
- 10/11/2017 16:29:09 **Offer free trial** Email  
SCHEDULED
- 10/18/2017 15:29:09 **After 7 days (if not partner yet)** Email  
SCHEDULED

### Campaigns / Partnership Offer

SAVE DISCARD 1/1 < >

- 7 Days **After 7 days (if not partner yet)** Email  
EDIT Delete  
Last 15 Days: 14 SUCCESS, 2 REJECTED  
28 Sep 03 Oct 08 Oct 12 Oct  
EMAIL DETAILS: 16 Sent, 60% Clicked, 30% Replied  
Add child activity
- Replied after 1 Hours **Message for sales person** Server Action  
EDIT Delete  
Last 15 Days: 0 SUCCESS, 0 REJECTED  
28 Sep 03 Oct 08 Oct 12 Oct  
Add child activity
- 10 Days **Perform Specific Task** Server Action  
EDIT Delete  
Match records with the following rule:  
Country > Country Code = "BE"

# Surveys

Gather feedback directly from your contacts database based on any business parameter.

Surveys / User Feedback Form

EDIT CREATE Action 2 / 2 < >

TEST SURVEY PRINT SURVEY **SHARE AND INVITE BY EMAIL** VIEW RESULTS DRAFT **IN PROGRESS** CLOSED PERMANENT

## User Feedback Form

Edit Pages and Questions Options

Page Title

- About your Odoo usage
- Ergonomy and ease of use
- Community and contributors
- Questions for developers

The laptop screen displays the following content:

- Odoo logo and navigation menu: Home, Shop, Events, Forum, Blog, Presentations, Jobs, Contact us, Documentation, Public Pricelist, Administrator
- Survey Title: User Feedback Form
- Subtitle: This survey should take less than five minutes.
- Progress: 4/4 surveys (Finished surveys)
- Section: Ergonomy and ease of use
- Text: These questions relate to the ergonomy and ease of use of Odoo. Try to remind your firsts days on Odoo and what have been your difficulties.
- Question: What do you think about the documentation available on doc.odoo.com? (4 Answered, 2 Skipped)
- Chart: A grouped bar chart showing responses for five statements. The legend includes 'Totally disagree' (blue), 'Disagree' (light blue), 'Agree' (orange), and 'Totally agree' (dark orange).

Statement	Totally disagree	Disagree	Agree	Totally agree
It is up-to-date	1	2	1	0
It helps in the beginning	1	0	2	1
I use the contextual help...	1	0	1	2
It is complete	2	1	1	0
It is clear	1	2	1	0

# Marketing CRM & Automation Implementation

- CR & Marketing Business Process Chart Preparation
- Marketing Teams & Pipelines Setup
- Social Marketing Streams Setup
- Marketing Automation Rules Setup
- Automated Actions (in accordance to Process Chart) Setup
- 12 hours Training & Post-launch Consultations

Timeframe: 2 weeks

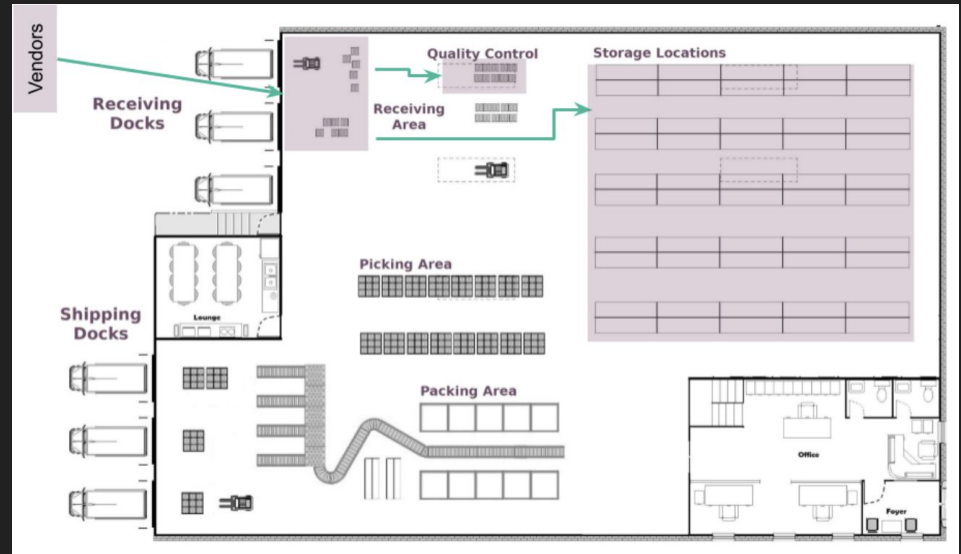
Implementation Cost\*: £3900.00 + VAT

Enterprise Software Cost\*\*: €100.00 / month + €22.50 / User / Month

*\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.*

# 3. Warehouse & Procurement

- Multi-Warehouse Locations
- All Inventory Operations
- Barcode scanner ready
- Cross-docking & Drop-shipping
- Automated Purchases
- Full Traceability & Real-time Reports





# Multi-Warehouse Locations

Full flexibility to setup warehouses, locations within those warehouses and routes for each warehouse operation.

The screenshot displays the 'Inventory' management system interface. The top navigation bar includes 'Inventory', 'Dashboard', 'Operations', 'Master Data', 'Reporting', and 'Configuration'. The main header shows 'Inventory / YourCompany: Internal Transfers' with a search bar and filters. Below this is a table of internal transfers with columns for Reference, Destination Location, Partner, Scheduled Date, and Source. A dropdown menu is open, showing a list of stock locations. The selected location is 'WHA+B/Stock', which is highlighted with a red box. The dropdown menu also shows 'Additional Info', 'Location Type', 'Owner', 'Is a Scrap Location', and 'Is a Return Location'.

Reference	Destination Location	Partner	Scheduled Date	Source
<input type="checkbox"/> Picking #1	WH/Output		02/01/2018 09:22:34	
<input type="checkbox"/> Picking #3	WH/Output		02/01/2018 09:22:34	
<input type="checkbox"/> Picking #2	WH/Output		02/01/2018 09:22:34	
<input type="checkbox"/> WH/INT/00003	WH/Stock	Agrolait	02/01/2018 10:42:44	SO102
<input type="checkbox"/> WH/INT/00002	WH/Quality Control	Agrolait	02/01/2018 10:42:44	SO102
<input type="checkbox"/> WH/INT/00004	WH/Quality Control		02/05/2018 09:27:40	PO000
<input type="checkbox"/> WH/INT/00005	WH/Stock		02/05/2018 09:27:40	PO000
<input type="checkbox"/> WH/INT/00007	WH/Stock		02/01/2018 10:42:44	
<input type="checkbox"/> WH/INT/00006	WH/Quality Control		02/01/2018 10:42:44	
<input type="checkbox"/> WH/INT/00011	WH/Stock		02/01/2018 12:31:33	PO000
<input type="checkbox"/> WH/INT/00010	WH/Quality Control		02/01/2018 12:31:33	PO000

Warehouse A Stock Location

WHA+B/Stock

Additional Info

Location Type

Owner

Is a Scrap Location

Is a Return Location

- WH/Input/Order Processing
- WH/Input/Order Processing/Dispatch Zone
- WH/Input/Order Processing/Dispatch Zone/Gate A
- WH/Input/Order Processing/Dispatch Zone/Gate B
- WH/Stock
- WH/Stock/Shelf 1
- WH/Stock/Shelf 2
- WH/Stock/Shelf 2/Small Refrigerator
- WH1/Output

# All Inventory Operations

All inventory operations in 1 place: Inventory Adjustments, Transfers, Receipts, Picking, Packing, Delivery, Drop-shipping, valuation and more.

The screenshot displays an inventory management interface with a purple header bar containing navigation tabs: Inventory, Dashboard, Operations, Master Data, Reporting, and Configuration. The main area is a grid of operation cards, each with a title, company name, status, and a count. A modal window for 'Reordering Rules' is open over the 'Manufacturing' card.

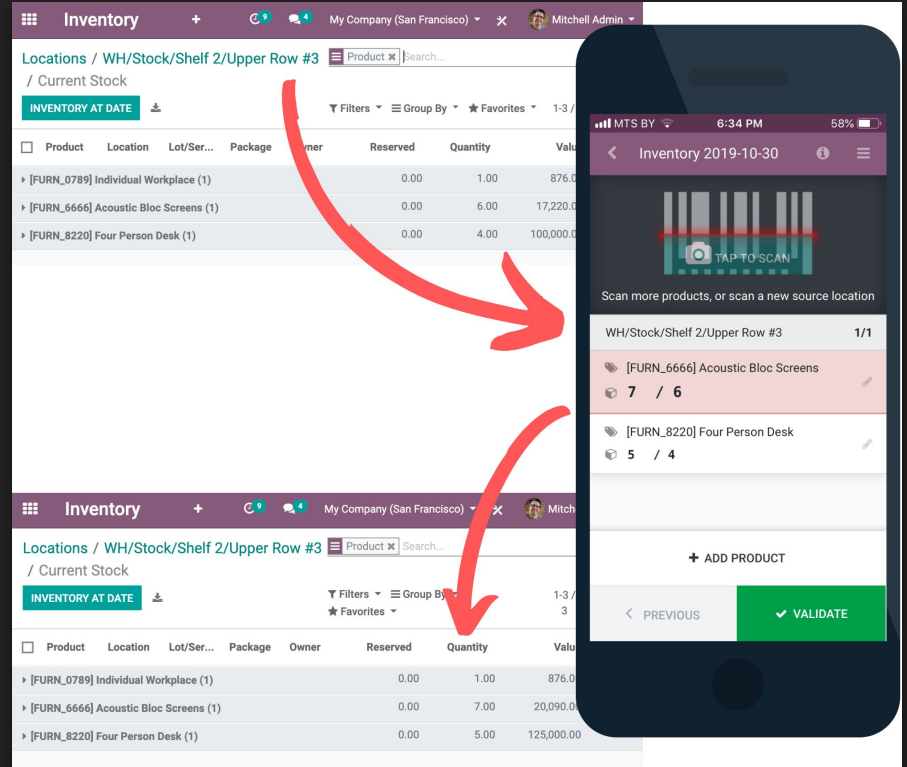
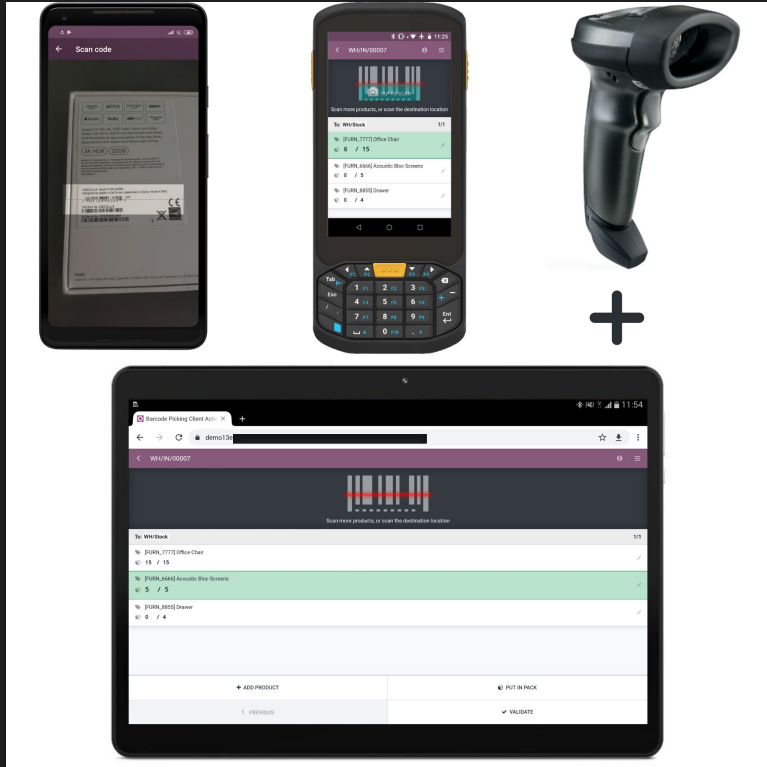
Operation	Company	Status	Count
Receipts	YourCompany	Late	4
Internal Transfers	YourCompany	Waiting Late	7
Pick	YourCompany	0 TRANSFERS	6
Pack	YourCompany	Waiting Late	2
Delivery Orders	YourCompany	Waiting Late	13
Manufacturing	YourCompany	3 TO DO	17
Receipts	My Company, Chicago	0 TO RECEIVE	2
Internal Transfers	My Company, Chicago	0 TRANSFERS	2
Delivery Orders	My Company, Chicago	0 TO DO	2

Field	Value
Name	OP/00004
Product	[E-COM10] Apple Wireless Keyboard
Warehouse	Chicago Warehouse
Location	Chic/Stock
Procurement Group	
Rules	
Minimum Quantity	10.000
Maximum Quantity	20.000
Quantity Multiple	1.000
Misc	
Lead Time	1 Day(s) to purchase

# Barcode Scanner Ready

Run your SMS marketing campaigns directly from your ERP system. Fully integrated with other applications, including Sales, Invoicing and CRM



# Cross-docking & Drop-shipping

Run your SMS marketing campaigns directly from your ERP system. Fully integrated with other applications, including Sales, Invoicing and CRM

☆ WH/INT/00025

Contact	Administrator
Operation Type	San Francisco: Internal Transfers
Source Location	WH/Stock
Destination Location	WH/Stock

Operations Additional Info Note

Product	Description	Deadline
[FURN_0006] Monitor Stand	Monitor Stand	

[Add a line](#)

## Location & Warehouse

### Procurements

- Reserve sale orders immediately on confirmation
- Reserve sale orders manually or by running the schedulers

### Multi Locations

- Do not record internal moves within a warehouse
- Manage several locations per warehouse

### Routes

- No automatic routing of products
- Advanced routing of products using rules

Minimum days to trigger a propagation of date change in pushed/pull flows.

### Products

Decimal precision on weight

[Configure Product Barcodes](#)

### Claims

- Do not manage claims
- Allow claims on deliveries

### Dropshipping

- Suppliers always deliver to your warehouse(s)
- Allow suppliers to deliver directly to your customers

### Picking Waves

- Manage pickings one at a time
- Manage picking in batch per worker

### Minimum Stock Rules

- Set lead times in calendar days (easy)
- Adapt lead times using the suppliers' open days calendars (advanced)

# Automated Purchases

Ability to add vendors to each products and trigger automatic Request for Quotation when stock drops to minimum quantity or sale order triggers the replenishment.

**Purchase** Orders Products Reporting Configuration 36 5 My Company (San Francisco) Mitchell Admin

### Requests for Quotation

CREATE Filters Group By Favorites 1-22 / 22

All RFQs	11 To Send	0 Waiting	11 Late	Avg Order Value (\$)	7897.48	Purchased Last 7 Days (\$)	77901.83
My RFQs	9	0	9	Lead Time to Purchase	2.57 Days	RFQs Sent Last 7 Days	0

Reference	Vendor	Company	Purchase Representative	Order Deadline	Next Activity	Source Document	Total	Status
<input type="checkbox"/> ☆ P00022	Wood Corner	My Company (San Francisco)			🕒	OP/00009	\$ 6,500.00	Purchase Order
<input type="checkbox"/> ☆ P00021	Azure Interior	My Company (San Francisco)	Mitchell Admin		🕒		\$ 70.00	Purchase Order
<input type="checkbox"/> ☆ P00020	Bloem GmbH	My Company (San Francisco)	Mitchell Admin		🕒		\$ 700.00	Purchase Order
<input type="checkbox"/> ☆ P00019	Deco Addict	My Company (San Francisco)		70 days ago	🕒	S00061	\$ 180.00	RFQ
<input type="checkbox"/> ☆ P00018	Korea	My Company (San Francisco)			🕒	S00054	\$ 180.00	Purchase Order
<input type="checkbox"/> ☆ P00017	Wood Corner	My Company (San Francisco)		Today	🕒	OP/00002	\$ 20,640.00	RFQ
<input type="checkbox"/> ☆ P00016	Azure Interior	My Company (San Francisco)			🕒	OP/00001	\$ 333.83	Purchase Order
<input type="checkbox"/> ☆ P00015	Wood Corner	My Company (San Francisco)			Send shipping details		\$ 46.00	Purchase Order

# Full Traceability & Real-time Reports

Track every stock move from purchase to warehouse bin to sales order. Trace lots or serials upstream or downstream from anywhere in your supply chain.

**Inventory** | Dashboard | Operations | Master Data | Reporting | Configuration

Inventory / YourCompany: Internal Transfers

Operation Type: YourCompany: Internal Transfers

Filters | Group By | Favorites | 1-13 / 13

Reference	Destination Location	Partner	Scheduled Date
<input type="checkbox"/> Picking #1	WH/Output		02/01/2018 09:22:34
<input type="checkbox"/> Picking #3	WH/Output		02/01/2018 09:22:34
<input type="checkbox"/> Picking #2	WH/Output		02/01/2018 09:22:34
<input type="checkbox"/> WH/INT/00003	WH/Stock	Agrolait	02/01/2018 10:42:44
<input type="checkbox"/> WH/INT/00002	WH/Quality Control	Agrolait	02/01/2018 10:42:44
<input type="checkbox"/> WH/INT/00004	WH/Quality Control		02/05/2018 09:27:40
<input type="checkbox"/> WH/INT/00005	WH/Stock		02/05/2018 09:27:40
<input type="checkbox"/> WH/INT/00007	WH/Stock		02/01/2018 10:42:44
<input type="checkbox"/> WH/INT/00006	WH/Quality Control		02/01/2018 10:42:44
<input type="checkbox"/> WH/INT/00011	WH/Stock		02/01/2018 12:31:33
<input type="checkbox"/> WH/INT/00010	WH/Quality Control		02/01/2018 12:31:33

### Warehouse Analysis

Transfer Date: October 2021

Measures | Group By | Count

Metric	Value
Deliveries Cycle Time	0.13 days
Receipts Cycle Time	0.14 days
Deliveries Delay	1.87 days
Receipts Delay	0.70 days
Inventory Turnover	0.18
Inventory Value	\$ 370.30k
Outgoing Inventory Value	\$ -67.47k
Incoming Inventory Value	\$ 277.10k

# Warehouse & Procurement

- Warehouse & Procurement Business Process Chart Preparation
- Warehouse Locations and Routes Setup
- Procurement Rules Setup
- Warehouse & procurement Teams & Permissions Setup
- Barcode Scanner Operations Setup
- Product Import (from csv or xlxs files)
- 12 hours Training & Post-launch Consultations

Timeframe: 3 weeks

Implementation Cost\*: £5850.00 + VAT

Enterprise Software Cost\*\*: €50.00 / month + €22.50 / User / Month

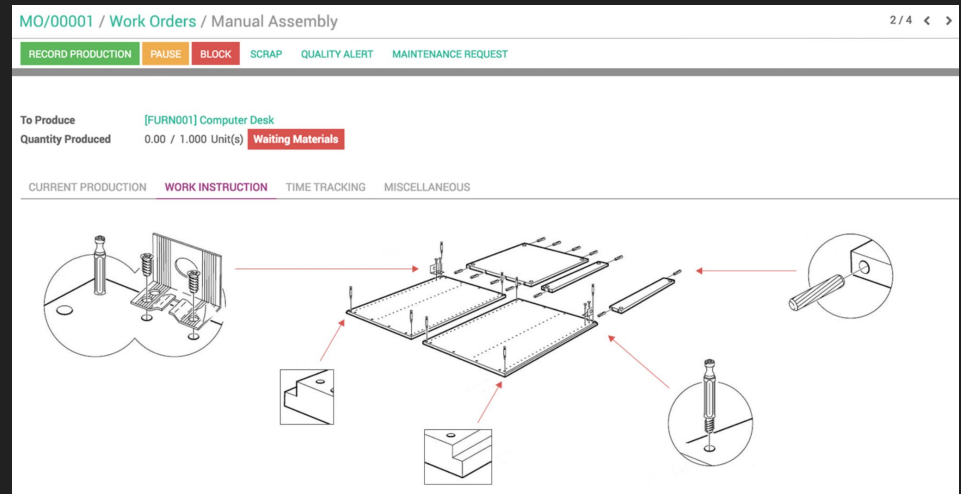
Open-source Software Cost\*\*: £90.00 / month for hosting only

\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.

\*\* - Solution is available both in open-source and enterprise software options.

## 4. Manufacturing (MRP)

- Engineering, PLM and BOM Management
- Manufacturing Planning and Work Orders
- Master Production Scheduler
- Quality Control
- Maintenance Management





# Engineering PLM And BOM Management

With Odoo PLM, you can work on several versions of the same BoM in parallel and apply only the differences to manage multiple changes.

The screenshot displays the Odoo PLM interface for managing Engineering Change Orders (ECO). The main dashboard shows a list of ECOs under 'New' and 'Engineering' categories. The detailed view for ECO0007 is shown, including a 'Short Summary' and a 'Components' table. A red box highlights the 'Product Variant' field in the 'Product' section, and another red box highlights the 'Apply on Variants' section in the 'Components' table, which includes model selection buttons for 2021, 2019, and 2020.

**Short Summary**  
ECO0007

Type:  Product Change,  Bill of Materials,  Routing,  BoM and Assembly Line

Product: Custom Computer Kit  
Reference: Product Variant  
Quantity: 1.00 Units

BoM Type:  Manufacture this product,  Kit,  Subcontracting  
Company: My Company (San Francisco)

Components	Operations	Miscellaneous	Quantity	Product Unit of Measure	Apply on Variants
1.2 GHz CPU		0	1.00	Units	
Motherboard FX145		0	1.00	Units	
Custom Fans		0	1.00	Units	
16GB RAM		0	1.00	Units	
8GB RAM		0	1.00	Units	
Add a line					

Apply on Variants:  Model: 2021,  Model: 2019,  Model: 2020

# Manufacturing Planning and Work Orders

Accurate planning directly based on real manufacturing times measures. Display worksheets, quality alerts to workers during operations.

**Manufacturing** Dashboard Operations Planning Master Data Reporting Configuration 37 24 Administrator

Manufacturing Orders Status Search...

CREATE IMPORT Filters Group By Favorites

Cancelled	Confirmed	Done	Planned
[FURN001] Table MO/00027 02/09/2018 Cancelled	[HDD-DEM] HDD on Demand 1.000 Unit(s) MO/00002 02/09/2018 Confirmed	[LAP-CUS] Laptop Customized 5.000 Unit(s)	[PCSC234] Computer SC234 4.000 Unit(s)
[PCSC234] Computer SC234 10.000 Unit(s) MO/00028 02/09/2018 Cancelled	[FURN001] Table 1.000 MO/00003 02/09/2018 Confirmed		
[FURN001] Table 1.000 Unit(s) MO/00027 02/09/2018 Cancelled	[FURN001] Table 1.000 MO/00021 02/09/2018 Confirmed		
[HDD-DEM] HDD on Demand 10.000 Unit(s) MO/00028 02/09/2018 Cancelled	[FURN001] Table 1.000 MO/00022 02/09/2018 Confirmed		
[FURN001] Table 1.000 Unit(s) MO/00023 02/09/2018 Cancelled			

**Workcenter Control Panel**

- Track Time
- Display Worksheets
- Register Production
- Integrate Quality checks
- In Process Alerts
- Record Serial/lot number



# Quality Control

Define quality control plans to trigger quality checks at specific inventory operations (receiving and final inspection) or manufacturing operations (in-process inspection).

The image displays two overlapping screenshots of a Quality Control software interface. The top screenshot shows the 'Quality Alerts' page, and the bottom screenshot shows the 'Quality Control Points' page.

### Quality Alerts

Navigation: Dashboard | Quality Control | Reporting | Configuration

Search: Search...

Actions: CREATE | IMPORT

Filters: Filters | Group By | Favorites

Category	Item	Rating	Avatar
New	[E-COM10] Apple Wireless Keyboard QA00001	★★☆	
	[HDD-SH1] HDD SH-1 QA00005	☆☆☆	
	[CONS_DEL02] Little server QA00009	★★☆	
Confirmed	[E-COM10] Apple Wireless Keyboard QA00002	☆☆☆	
	[E-COM08] Apple In-Ear Headphones QA00004	★★★☆☆	
Action Proposed	[E-COM05] Bose Mini Bluetooth Speaker QA00003	★★☆☆	
	iPad Retina Display QA00007	☆☆☆☆	
	[E-COM08] Apple In-Ear Headphones QA00010	☆☆☆☆	

### Quality Control Points

Navigation: Dashboard | Quality Control | Reporting | Configuration

Search: Product Search...

Actions: CREATE | IMPORT

Filters: Filters | Group By | Favorites

Product	Operation Type
▼ [PCSC234] Computer SC234 (1)	
<input type="checkbox"/> QCP00020	[PCSC234] Computer SC234 YourCompany: Manufacturing
▼ [PROD_DEL02] Datacard (1)	
<input type="checkbox"/> QCP00002	[PROD_DEL02] Datacard YourCompany: Receipts
▼ [LAP-CUS] Laptop Customized (1)	
<input type="checkbox"/> QCP00001	[LAP-CUS] Laptop Customized YourCompany: Receipts
▼ [FURN001] Table (7)	
<input type="checkbox"/> QCP00013	Choice of screwdriver [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00014	Component Registration: Table Head [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00015	Picture of the SN [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00016	Quality check [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00017	Measure the Angle [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00018	Table Legs [FURN001] Table YourCompany: Manufacturing
<input type="checkbox"/> QCP00019	Component Registration: Table Legs [FURN001] Table YourCompany: Manufacturing

# Maintenance Management

Odoo computes standard statistics to help you plan preventive maintenance, including mean time between failure (MTBF), mean time to repair (MTTR), and expected next failure date, and lets you automate metrology and preventive maintenance scheduling.

The screenshot displays the Odoo Maintenance Management interface. At the top, there is a navigation bar with the following tabs: Maintenance, Dashboard, Maintenance, Equipments, Reporting, and Configuration. The user is logged in as Administrator. Below the navigation bar, there is a search bar and a filter section with options for 'Filters', 'Group By', and 'Favorites'. The main content area is divided into three columns: Computers, Printers, and Monitors. Each column contains a list of equipment cards. The 'Computers' column shows three cards: Acer Laptop (NE56R), Acer Laptop (V5131), and HP Laptop (17-j059). The 'Printers' column shows two cards: HP Inkjet printer and Epson Printer 3942. The 'Monitors' column shows two cards: Samsung Monitor (MT/122/1111) and Samsung Monitor (MT/125/2277). Each card displays the equipment name, model number, and the number of requests. A calendar view is overlaid on the right side of the interface, showing a grid of dates from Sunday to Saturday. The calendar contains several maintenance events, such as '10a Battery drains fast, Camille Watkins' on Tuesday, '11a Touchpad not working, Frances Pierce' on Friday, and '3:45p Preventive maintenance on bandsaw, Toni Buchanan' on Saturday. A 'New Request' modal window is open in the foreground, showing details for a request on an Acer Laptop. The request is titled 'Some keys are not working' and is categorized as 'Computers'. It has a rating of three stars and is assigned to a user. The 'In Progress' and 'Repaired' sections are also visible, showing details for a 'Touchpad not working' request on an HP Laptop and a 'Resolution is bad' request on a Samsung Monitor.

**Equipment Cards:**

- Computers:**
  - Acer Laptop (NE56R) LP/203/19281928 (1 Request)
  - Acer Laptop (V5131) LP/205/12928291 (1 Request)
  - HP Laptop (17-j059) LP/303/28292090 (1 Request)
  - HP Laptop LP/305/17281718
- Printers:**
  - HP Inkjet printer PR/011/2928191889 (2 Request)
  - Epson Printer 3942 SN: 127-4855
- Monitors:**
  - Samsung Monitor MT/122/1111 (1 Request)
  - Samsung Monitor MT/125/2277 (2 Request)

**Calendar Events:**

- 10a Battery drains fast, Camille Watkins (Tue)
- 11a Touchpad not working, Frances Pierce (Fri)
- 11a Some keys are not working, Toni Buchanan (Mon)
- 2:30p Defrag hard drive, Frances Pierce (Tue)
- 3:45p Preventive maintenance on bandsaw, Toni Buchanan (Sat)
- 2p Impact driver seems low on torque, Judy Garza (Sat)

**Request Details:**

- New Request:** Some keys are not working (Acer Laptop/LP/203/19281928, Computers, 3 stars)
- In Progress:** Touchpad not working (HP Laptop/LP/305/17281718, Computers, 3 stars)
- Repaired:** Resolution is bad (Samsung Monitor 15"/MT/127/18291018, Monitors, 4 stars)
- Battery drains fast:** HP Laptop/LP/303/28292090 (Computers, 3 stars)

**Calendar Summary (May 2016):**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Legend:**

- Camille Watkins
- Judy Garza
- Frances Pierce
- Toni Buchanan

# Manufacturing (MRP) Implementation

- Full GAP Analysis
- Warehouse & Procurement Implementation
- PLM and BOM Setup
- Manufacturing Routing & Work Centers Setup
- Quality Control Points Setup
- Equipment & Maintenance Setup
- User Roles & Permissions Setup
- 24 hours Training & Post-launch Consultations

Timeframe: 3 months

GAP Analysis Cost: £3900.00 + VAT

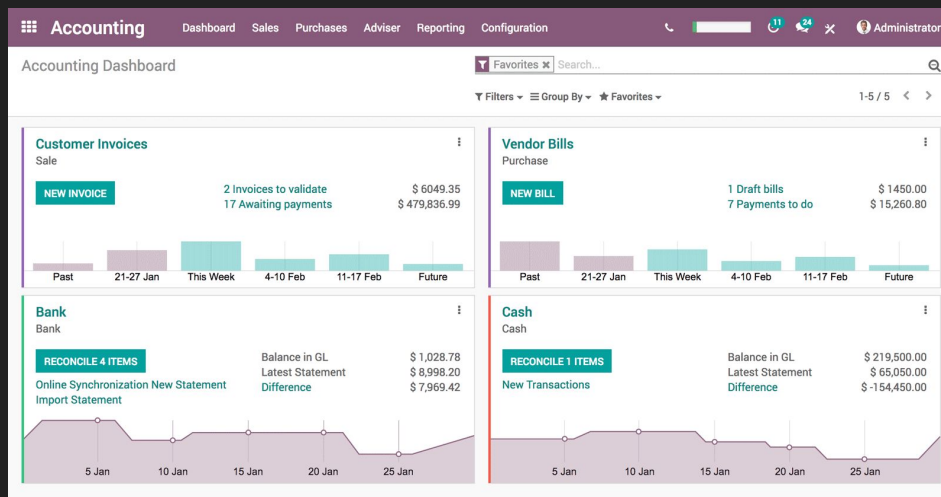
Implementation Cost\*: £17550.00 - £26325.00 + VAT

Enterprise Software Cost\*\*: €130.00 / month + €22.50 / User / Month

*\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.*

# 5. Accounting

- Bank Synchronization
- Customer Invoices
- Bills & Expenses
- Easy Reconciliation
- HMRC & VAT Returns



# Bank Synchronization

Get your bank statements synced with your bank automatically, or import files. Odoo syncs with all UK and European banks.

## Belgian Bank - BE22429975367647

Bank

**RECONCILE 7 ITEMS**

Create or Import Statements

Balance in GL **0.00 €**

Latest Statement **5,180.00 €**

Difference

### Synchronization result

**Well done!** Your banking institution is now connected to Odoo.

A total of "5" bank accounts have been retrieved.

You can associate those bank accounts to a journal in order to automatically retrieve the latest statements from your bank.

Fetch transaction from 11/01/2018

Account Number	Account name	Balance	Action	Journal	Journal Statements Creation
1566	BUSINESS CHECKING	241.54	Do not link		
3572	BUSINESS MARKET RATE SAVINGS	0.43	Create new journal		Create daily statements
7360	BUSINESS CHECKING	64.25	Do not link		
8091	BUSINESS CHECKING	684.30	Create new journal		Create monthly statements
8109	BUSINESS MARKET RATE SAVINGS	0.00	Link to existing journal	Wells Fargo (USD)	Create one statement per synchronization

**SYNCHRONIZE NOW** CANCEL



# Customer Invoices

Turn Quotes into Invoices with minimal effort Bill automatically based on sales orders, delivery orders, contracts, or time and material.

**Accounting** Overview Customers Vendors Accounting Reporting Configuration

Invoices / INV/2019/0004

EDIT CREATE Print - Action - 1 / 1 < >

SEND & PRINT REGISTER PAYMENT ADD CREDIT NOTE PREVIEW DRAFT OPEN PAID Send message Log note Schedule activity Follow 3

### INV/2019/0004

Customer: Deco Addict, 325 Elsie Drive, Franklin WV 26807, United States  
Delivery Address: [Blank]  
Payment Terms: Immediate Payment

Invoice Date: 01/13/2019  
Due Date: 01/13/2019  
Salesperson: Marc Demo  
Sales Team: Europe

January 28, 2019

OdooBot - 3 days ago  
Invoice validated  
• Status: Draft → Open

OdooBot - 3 days ago  
Invoice Created  
• Type: Customer Invoice  
• Salesperson: Marc Demo  
• Status: Draft  
• Currency: USD  
• Partner: Deco Addict

Product	Description	Account	Deferred Revenue	Quantity	Price	Disc (%)	Taxes	Subtotal
[FURN_6741] Large Meeting Table	[FURN_6741] Large Meeting Table	200000 Product Sales		5.000	642.00	0.00		\$ 3,210.00
[FURN_8220] Four Person Desk	[FURN_8220] Four Person Desk	200000 Product Sales		5.000	280.00	0.00		\$ 1,400.00

Untaxed Amount: \$ 4,610.00  
Tax: \$ 0.00  
Total: **\$ 4,610.00**

Amount Due: **\$ 4,610.00**

## Configure your document layout

### Layout

- Light
- Boxed
- Bold
- Striped

### Font

Lato

### Company Logo



### Colors



### Layout Background

Blank

### Company Tagline

MY TAG

### Company Details

My Company (San Francisco)  
250 Executive Park Blvd, Suite 3400  
  
San Francisco CA 94134  
United States

### Footer

+1 (650) 555-0111 info@yourcompany.com  
http://www.example.com/EKU9003173C9

### Paper format

US Letter

**Your logo** MY TAG

My Company (San Francisco)  
250 Executive Park Blvd, Suite 3400  
San Francisco CA 94134  
United States

Deco Addict  
77 Santa Barbara Rd  
Pasadena Hills, CA 94523  
United States

Invoice INV/2020/07/0003

Description	Quantity	Unit Price	Taxes	Amount
[FURN_8998] Three-Seat Sofa	3.000	1,500.00	15.00%	\$ 7,500.00
Three-Seat Sofa with Lounger in Steel Grey Colour				
[FURN_8220] Four Person Desk	5.000	2,350.00	15.00%	\$ 11,750.00
Four person modern office workstation				
Subtotal				\$ 19,250.00
Tax 15%				\$ 2,887.50
Total				\$ 22,137.50

Please use the following communication for your payment: INV/2020/07/0003  
Payment terms: 30 Days

13 (650) 555-0111 info@yourcompany.com http://www.example.com/EKU9003173C9

Download PDF Preview

# Bills & Expenses

Managing your employees' daily expenses has never been easier. Whether it's travel expenses, office supplies, or any other employee expenditure, access all receipts and expense submissions from your Expenses dashboard and create, validate, or refuse them in just a click.

The screenshot displays the 'Expenses' dashboard with a navigation bar at the top containing 'Expenses', 'My Expenses', 'Expense Reports', 'Reporting', and 'Configuration'. The main area is divided into four columns representing expense statuses: 'Approved' (4 items), 'To Submit' (4 items), 'Refused' (3 items), and 'Submitted' (1 item). Each item shows the category, amount, employee name, and date, along with a status button (Approved, To Submit, or Refused).

An overlay window shows a detailed view of a 'Business Trip' expense report for Pieter Parker. The report includes a table of expense lines with columns for Expense Date, Expense Description, Analytic Account, and Total.

Expense Date	Expense Description	Analytic Account	Total
03/15/2018	Gifts baskets		\$ 75.44
02/12/2018	Car Rental	Camp to Camp - Camptocamp	\$ 250.00
02/12/2018	Hotel Accomodation	Camp to Camp - Camptocamp	\$ 400.00
02/09/2018	Travel by Air	Our Super Product - Agrolait	700.00 €

Below the table, a notification from 'YourCompany, Administrator' states: 'Expense report submitted, waiting approval' with a status of 'Submitted'.

# Reconciliation

Save time and automate 95% of reconciliation with Odoo's smart reconciliation tool.

The screenshot displays the Odoo Accounting Reconciliation interface. The top navigation bar includes 'Accounting', 'Dashboard', 'Customers', 'Vendors', 'Accounting', 'Reporting', and 'Configuration'. The user is logged in as 'Mitchell Admin' in 'Demo Company'.

The main content area shows the 'Accounting Dashboard / Bank' section with a search bar. Two reconciliation panels are visible, each for the partner 'Deco Addict'. Each panel has a 'VALIDATE' button and a table of transactions.

**Reconciliation Panel 1 (Deco Addict):**

101404	01/01/2022	R:9772938 10/07 AX 9415116318 T:5 BRT: 100,00€ C/ croip	\$ 96.67	\$ -48,012.50
121000	08/07/2022	INV/2022/00002		\$ 96.67

**Reconciliation Panel 2 (Deco Addict):**

101404	01/01/2022	INV/2022/00002	\$ 750.00	\$ -48,012.50
121000	08/07/2022	INV/2022/00002		\$ 750.00

**Detailed View (Deco Addict):**

Select Partner: Deco Addict

101404	01/01/2022	101404	01/01/2022	INV/2022/00002	\$ 750.00	\$ 750.00
121000		121000		Open balance		\$ 750.00

Customer/Vendor Matching | Manual Operations

Filter on account, label, partner, amount,...

121000	08/07/2022	INV/2022/00002	\$ 47,915.83
121000	08/07/2022	INV/2022/00003	\$ 22,137.50
121000	08/13/2022	INV/2022/00004	\$ 36,512.50

# HMRC & VAT Returns

Odoo is compliant with the MTD requirements to submit tax obligations. Connect to HMRC, fetch your obligations and send them with only a few clicks.

The image displays three overlapping screenshots of the Odoo Accounting interface, illustrating the workflow for submitting VAT returns to HMRC.

- Top Screenshot:** Shows the "VAT Return" form with a purple header. The "SEND TO HMRC" button is highlighted with a red box. Other buttons include "PRINT PREVIEW" and "EXPORT (XLSX)". The top navigation bar includes "Accounting", "Overview", "Customers", "Vendors", "Accounting", "Reporting", and "Configuration".
- Middle Screenshot:** Shows the "HMRC VAT Obligations" list for the period 2017-03-07 to 2017-01-31. A dropdown menu is open, showing "United Kingdom" selected, with "VAT Return" and "VAT Obligations" as options. The "SEND TO HMRC" button is again highlighted with a red box. The "Reporting" and "Configuration" tabs are visible.
- Bottom Screenshot:** Shows a notification message in the Odoo interface. The message text reads: "YourCompany, Mitchell Admin - Tax return successfully posted. Date Processed: 2018-12-12T10:27:37.255Z. Payment Indicator: BANK. Form Bundle Number: 501907209106." Below this, "Sent Values:" are listed, including vatDueSales, vatDueAcquisitions, totalVatDue, vatReclaimedCurrPeriod, netVatDue, totalValueSalesExVAT, totalValuePurchasesExVAT, totalValueGoodsSuppliedExVAT, totalAcquisitionsExVAT, periodKey, and finalised. A second notification below it states "hmrc.vat.obligation created".

# Standard Accounting Implementation

- Bank Synchronization Setup
- PDF Templates Setup
- Customer Invoice Payment Reminders Setup
- Reconciliation Setup
- HMRC & VAT Returns Setup
- 20 hours Training & Post-launch Consultations

Timeframe: 2 weeks

Implementation Cost\*: £3900.00 + VAT

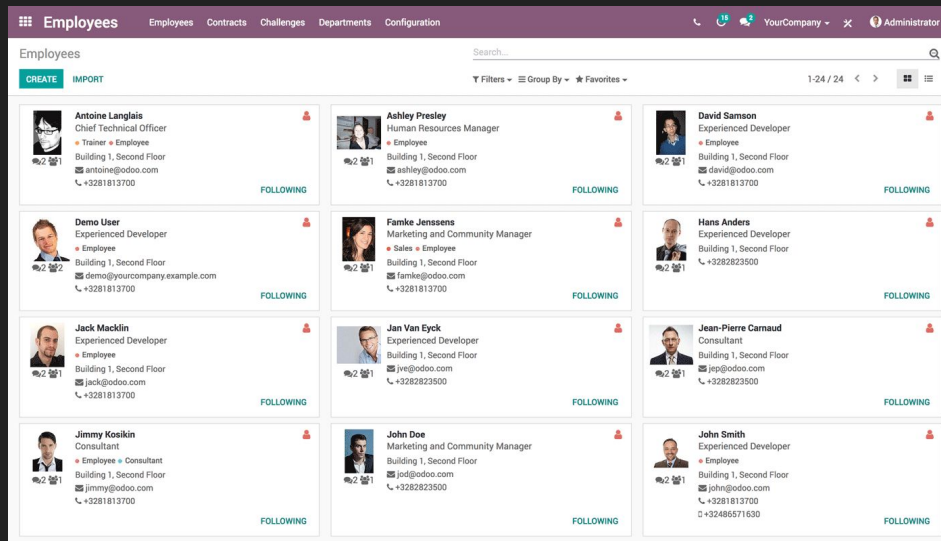
Enterprise Software Cost\*\*: Free or €30.00 / month + €22.50 / User / Month

*\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.*

*\*\* - Free if Accounting is used standalone. If more applications are connected (i.e. CRM), then paid option activates.*

# 6. HR & Talent Acquisition

- Time & Attendance
- Leave & Time-off
- Expense Management
- Employee Evaluation
- Recruitment Management
- Payslip Generator



# Time & Attendance

Weekly or monthly timesheets with optional attendance tracking.

The screenshot shows the 'Attendances' interface for Mitchell Admin. The top navigation bar includes 'Attendances', 'Check In / Check Out', 'Kiosk Mode', 'Attendances', 'Reporting', and 'Configuration'. The user's name 'Mitchell Admin' and company 'My Company (San Francisco)' are visible. The main content area displays a profile picture of Mitchell Admin, the text 'Want to check out?', and 'Today's work hours: 01:04'. A large yellow button with a blue arrow icon is labeled 'Click to check out'.

The screenshot shows the 'Employees / Pieter Parker / Timesheets' interface. The top navigation bar includes 'Employees', 'Contracts', 'Challenges', 'Departments', and 'Configuration'. The user's name 'Administrator' is visible. The main content area displays a search bar with 'Employee Pieter Parker' and a search icon. Below the search bar are buttons for 'IMPORT', 'SAVE', and 'DISCARD'. A table with columns for Date, Employee, Description, Project, Task, and Time (Hours) is shown. The table contains 10 rows of data.

<input type="checkbox"/>	Date	Employee	Description	Project	Task	Time (Hours)
<input type="checkbox"/>	02/14/2018	Pieter Parker	Support & Minor bug fixes	E-Learning Integration	Deploy and review	00:00
<input type="checkbox"/>	02/11/2018	Pieter Parker	Coding and module testing	Research & Development		03:00
<input type="checkbox"/>	02/11/2018	Pieter Parker	Delivery and maintenance	Research & Development	User interface improvements	01:00
<input type="checkbox"/>	02/11/2018	Pieter Parker	Design and specification	Research & Development		01:00
<input type="checkbox"/>	02/11/2018	Pieter Parker	Integration and system testing	Research & Development	Social network integration	01:00
<input type="checkbox"/>	02/11/2018	Pieter Parker	Requirements analysis	Research & Development		02:00
<input type="checkbox"/>	02/14/2018	Pieter Parker	Research & Design	Website Design Templates	Create new components	02:30
<input type="checkbox"/>	02/14/2018	Pieter Parker	Specification writing	Website Design Templates	Basic outline	01:00
						11:30

# Leave & Time-off

Simplified tracking for employee vacation and sick days. Employees enter their requests. Managers decide to either approve or refuse time off requests. Notification is sent to the employee and their calendar is updated automatically.

The screenshot displays the 'Leaves' application interface. The top navigation bar includes 'Leaves', 'Overview', 'My Leaves', 'Managers', 'Reporting', and 'Configuration'. Below the navigation bar, there are search filters for 'Current Year' and 'Employee', and a search input field. The main area shows a calendar view for 2015, with a list of leave requests on the left. A modal window is open over the calendar, displaying details for a leave request: 'Description: Pieter Parker on Legal Leaves 2015', 'Leave Type: Legal Leaves 2015', 'Duration: 08/17/2015 08:00:00- 08/28/2015 18:00:00', and '12.00 days'. The modal also includes a section for 'Comment by Manager'.

Gantt View		2015																
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Pieter Parker on Legal Leaves 2015														12 Allocation				
Pieter Parker on Legal Leaves 2015																		
Ashley Presley on Legal Leaves 2015																		
Antoine Langlais on Legal Leaves 2015																		
Gilles Gravie on Sick Leaves																		
Alice Englert on Legal Leaves 2015																		
Ashley Presley on Legal Leaves 2015																		
Trip with Family																		
Pieter Parker on Unpaid																		
Pieter Parker on Compensatory Days																		
Doctor Appointment																		

**Description**

**Leave Type**

**Duration**

**Comment by Manager**

**Description**

Pieter Parker on Legal Leaves 2015

**Leave Type**

Legal Leaves 2015

**Duration**

08/17/2015 08:00:00- 08/28/2015 18:00:00

12.00 days

**Comment by Manager**

I have to refuse your request for holidays because John will already be away at this period and we need you to keep up with a part of his work.  
I will make sure your next request is approved.



# Expense Management

Managing your employees' daily expenses has never been easier. Whether it's travel expenses, office supplies, or any other employee expenditure, access all receipts and expense submissions from your Expenses dashboard and create, validate, or refuse them in just a click.

The dashboard features a purple header with navigation links: Expenses, My Expenses, Expense Reports, Reporting, Configuration, My Company, and Mitchell Admin. Below the header, there's a search bar and filter options. The main content is divided into four columns: Approved (4 items), To Submit (4 items), Refused (3 items), and Submitted (0 items).

Category	Item	Amount	Status
Approved	Hotel Expenses	2,000.00 €	Approved
	Lunch	56.80 €	Approved
	Lunch with Customer	152.80 €	Approved
	Travel by Air	700.00 €	Approved
To Submit	Flight to Seattle	\$ 700.00	To Submit
	Laptop	889.00 €	To Submit
	Screen	289.00 €	To Submit
	Car tyres	450.32 €	To Submit
Refused	Paintball	300.00 €	Refused
	Drinks	42.50 €	Refused
	Pizzas	150.00 €	Refused

Expense Date	Expense Description	Analytic Account	Total
03/15/2018	Gifts baskets		\$ 75.44
02/12/2018	Car Rental	Camp to Camp - Camptocamp	\$ 250.00
02/12/2018	Hotel Accomodation	Camp to Camp - Camptocamp	\$ 400.00
02/09/2018	Travel by Air	Our Super Product - Agrolait	700.00 €

**Business Trip Details:**  
Employee: Pieter Parker  
Payment By: Employee (to reimburse)

**Activity Log:**  
YourCompany, Administrator - 16 minutes ago  
Expense report submitted, waiting approval  
• Status: Submitted

# Employee Evaluation

Easily set up your evaluation process and calendar. Design form-based questionnaires to collect feedback from everyone in the company, from employees to managers, as well as self-evaluations. Automate the entire process so that you can focus on people, not administration duties.

The image displays a multi-step process for setting up an employee evaluation. It features three overlapping screenshots of a software interface.

**Dashboard:** The top screenshot shows a dashboard with a purple header labeled "Appraisal". It includes a search bar, a table with columns "Name" and "Appraisal Deadline", and buttons for "CREATE" and "IMPORT". A table entry for "Mitchell Admin" with a deadline of "01/30/2019" is visible.

**Form Editor:** The middle screenshot is titled "Employee Appraisal Form". It shows a list of form sections: "Work Plan", "Employee Performance in Key Areas", "Professional Development and Performance", and "Employee Comments". A "START APPRAISAL AND SEND FORMS" button is prominent. A table on the right shows "5 records".

**Evaluation Form:** The bottom screenshot shows the evaluation form for "Mitchell Admin". It includes the name, department ("Management"), and appraisal deadline ("01/30/2019"). The form title is "Evaluation" with a sub-section "Engagement". It contains five statements, each with a 5-point Likert scale (radio buttons):  
1. "I am proud to tell others I work here"  
2. "My job provides me with a sense of personal accomplishment"  
3. "I would prefer to remain with this company even if a comparable job were available in another company"  
4. "Taking everything into account, how satisfied are you with your current job?"  
5. "I am willing to put in a great deal of effort beyond what is expected to help my workgroup succeed"  
A "Back to Survey" button is located in the top right corner.

# Recruitment

Set up your job board, promote your job listings and easily keep track of submitted applications. Follow every applicant and build a database of skills and profiles with indexed documents.

The screenshot displays a recruitment management dashboard. At the top, a purple navigation bar contains the title 'Recruitment' and menu items for 'Applications', 'Reporting', and 'Configuration'. On the right of the bar, there are notification icons (19), a user profile for 'My Company (San Francisco)', and 'Mitchell Admin'. Below the navigation bar, the main area is titled 'Job Positions' and includes a search bar and filter options. A sidebar on the left lists 'COMPANY' and 'RESPONSIBLE' filters. The main content area shows three job listings: 'Marketing and Community Manager' (5 applications), 'Experienced Developer' (6 applications), and 'Human Resources Manager' (2 applications). Each listing includes a 'PUBLISHED' badge and 'Share Trackers' link. A detailed view of the 'Full Stack Developer' position for 'Kelly Wallant' is shown on the right, with contact information, tags, and contract details.

**Recruitment** Applications Reporting Configuration

Search...

Filters Group By Favorites 1-7 / 7

**COMPANY**

- All
- BE Company
- My Belgian Company
- My Company (Chicago)
- My Company (San Francisco)

**RESPONSIBLE**

- All
- Carmille Watkins
- Frances Pierce
- Joel Willis
- Judy Garza
- Marc Demo
- Mitchell Admin
- Toni Buchanan

**Marketing and Community Manager** PUBLISHED

5 APPLICATIONS 3 New Applications 3 To Recruit

Job Description Share Trackers

**Experienced Developer** PUBLISHED

6 APPLICATIONS 4 New Applications 4 To Recruit

2 Meetings Start Interview Print Interview 0 Contracts

**Full Stack Developer**

Kelly Wallant

Email kelly.wallant@mymailbox.com

Phone

Mobile 879895515

Degree Graduate

Tags IT

Responsible Mitchell Admin

Appreciation ★★

Referred By User

**Job**

Applied Job Experienced Developer

Department Research & Development

Company My Company (San Francisco)

**Contract**

Expected Salary 4,000.00

Proposed Salary 3,800.00

Availability 04/13/2020

# Payslip Generator

Set up your job board, promote your job listings and easily keep track of submitted applications. Follow every applicant and build a database of skills and profiles with indexed documents.

The screenshot displays a payroll management system. The top navigation bar includes 'Payroll', 'Employees', 'Work Entries', 'Payslips', 'Reporting', and 'Configuration'. The user is logged in as 'Mitchell Admin' for 'My Company (San Francisco)'. The main view is 'Payslips To Pay', showing a list of payslips with columns for Reference, Employee, Batch Name, From, To, Company, Basic Wage, Net Wage, and Status. Below this, a detailed view for 'Salary Slip - Mitchell Admin - July 2020' is shown, featuring a 'Salary Computation' table.

Name	Code	Category	Quantity	Rate (%)	Rule	Amount	Total
Basic Salary	BASIC	Basic	1.00	100.0000	Basic Salary	5,500.00	5,500.00
House Rent Allowance	HRA	Allowance	1.00	40.0000	House Rent Allowance	5,500.00	2,200.00
Conveyance Allowance	CA	Allowance	1.00	100.0000	Conveyance Allowance	800.00	800.00
Conveyance Allowance For Gravie	CAGG	Allowance	1.00	100.0000	Conveyance Allowance For Gravie	600.00	600.00
Meal Voucher	MA	Allowance	19.00	100.0000	Meal Voucher	10.00	190.00
Sum of Allowance category	SUMALW	Allowance	1.00	100.0000	Sum of Allowance category	0.00	0.00
Gross	GROSS	Gross	1.00	100.0000	Gross	9,290.00	9,290.00
Provident Fund	PF	Deduction	1.00	-12.5000	Provident Fund	5,500.00	-687.50
Professional Tax	PT	Deduction	1.00	100.0000	Professional Tax	-200.00	-200.00
Net Salary	NET	Net	1.00	100.0000	Net Salary	8,402.50	8,402.50

# HR & Talent Acquisition Implementation

- Organisation Chart Preparation
- Departments & Employees Setup
- Leave & Time-off Setup
- Employee on-boarding & off-boarding setup
- Employee Appraisals Setup
- Recruitment Setup
- Payslip Structure Setup
- User Groups and Permissions Setup
- 12 hours Training & Post-launch Consultations

Timeframe: 3 weeks

Implementation Cost\*: £5850.00 + VAT

Enterprise Software Cost\*\*: €130.00 / month + €22.50 / User / Months

Open-source Software Cost\*\*: £60.00 / month for hosting only

\* - Any customisations that require development is agreed upfront and charge extra at £75 per hour.

\*\* - Partial solution is also available in open-source version.

Popular packages

# Service / Project Based Operations

## Small Business

- Sales CRM & Project
- Partial HR & Talent Acquisition

Timeframe: 2 weeks

Cost: £3900 + VAT

Enterprise Software Cost:

€80 / month + €22.50 / user / month

*5 users example: €192.50 / month*

Open-source Software Cost:

£60.00 + VAT for hosting only

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Accounting
- HR & Talent Acquisition

Timeframe: 6 weeks

Cost: £15600 + VAT

Enterprise Software Cost:

€150 / month + €22.50 / user / month

*20 user example: €600.00 / month*

# Financial Services

## Small Business

- Sales CRM & Project
- Accounting
- Documents & Sign

Timeframe: 4 weeks

Cost: £7600.00 + VAT

Enterprise Software Cost:

€130 / month + €22.50 / user / month

*5 user example: €242.50 / month*

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Accounting
- Documents & Sign
- Bills Digitalization
- Multi-company environment
- Multi-currency environment
- Clients Portal
- HR & Talent Acquisition

Timeframe: 8 weeks

Cost: £19500.00 + VAT

Enterprise Software Cost:

€220 / month + €22.50 / user / month

*20 user example: €670.00 / month*



# Field Service Operations

## Small Business

- Sales CRM & Project
- Field Service App
- Partial HR & Talent Acquisition

Timeframe: 3 weeks

Cost: £5850 + VAT

Enterprise Software Cost:

€100 / month + €22.50 / user / month

*5 user example: €212.50 / month*

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Field Service App
- Accounting
- HR & Talent Acquisition

Timeframe: 7 weeks

Cost: £17550 + VAT

Enterprise Software Cost:

€170 / month + €22.50 / user / month

*20 user example: €620.00 / month*

# Marketing Operations

## Small Business

- Sales CRM & Project
- Marketing CRM & Automation
- Partial HR & Talent Acquisition

Timeframe: 4 weeks

Cost: £7800.00 + VAT

Enterprise Software Cost:

€138 / month + €22.50 / user / month

*5 user example: €285.00 / month*

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Marketing CRM & Automation
- HR & Talent Acquisition
- Data Import / Export (csv, xlxs, json api)
- Third party app integration

Timeframe: 10 weeks

Cost: £23400.00 + VAT

Enterprise Software Cost:

€220 / month + €22.50 / user / month

*20 user example: €670.00 / month*

# B2B Wholesale Operations

## Small Business

- Sales CRM & Project
- Partial Inventory & Procurement

Timeframe: 3 weeks

Cost: £5850.00 + VAT

Enterprise Software Cost:

€90 / month + €22.50 / user / month

*5 user example: €202.50 / month*

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Inventory & Procurement
- Shipping Providers Connector
- Accounting

Timeframe: 7 weeks

Cost: £15600.00 + VAT

Enterprise Software Cost:

€220 / month + €22.50 / user / month

*20 user example: €560.00 / month*

# Multi-Stream Product Sales

## Small Business

- Sales CRM & Project
- Marketing CRM & Automation
- Partial Inventory & Procurement
- eBay & Amazon Connectors
- eCommerce

Timeframe: 5 weeks

Cost: £11700.00 + VAT

Enterprise Software Cost:

€370 / month + €22.50 / user / month

*5 user example: €482.50 / month*

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Marketing CRM & Automation
- Inventory & Procurement
- Shipping Providers Connector
- eBay & Amazon Connectors
- eCommerce
- Accounting

Timeframe: 9 weeks

Cost: £21450.00 + VAT

Enterprise Software Cost:

€370 / month + €22.50 / user / month

*20 user example: €820.00 / month*

# Manufacturing Operations

## Small Business

- Partial Manufacturing
- Partial Inventory & Procurement

Timeframe: 4 weeks

Cost: £9750.00 + VAT

Enterprise Software Cost: Free

## Medium Business

- GAP Analysis
- Sales CRM & Project
- Manufacturing
- Inventory & Procurement
- Accounting
- HR & Talent Acquisition

Timeframe: 3 months

Cost: £31200.00 + VAT

Enterprise Software Cost:

€480 / month + €22.50 / user / month

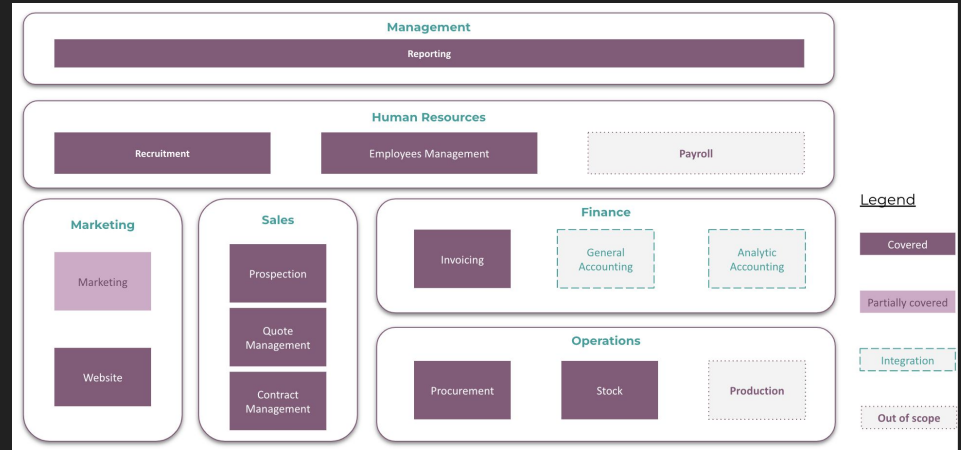
*20 user example: €930.00 / month*

Not sure where to start?

# 7. GAP Analysis

For larger projects, where 2 or more complex solutions are required to be combined (i.e. Sales CRM, Inventory & Manufacturing) - GAP Analysis is the first step of the process during which ERP Business Analyst and Client's Project Manager is working together hand-in-hand in order to find the best solutions, clear the doubts and set the budgets for the medium to large scope project. The main goals of the GAP Analysis are:

- Adapt client's specifications to the software
- Clear client's doubts about the feasibility of the software
- Opportunity for client to assess Project Leader
- Results in clear deadlines and budget



# How is GAP Analysis processed?

1. Project Leader meets stakeholders, defines the objectives, motivations and risks.
2. Project Leader meets key users per department and performs Key User Interview.
3. Project Leader understands the current situation and defines what should be done.
4. Project Team documents the GAP analysis & phasing.
5. Project Leader presents the results to the stakeholders.

Timeframe: 2 - 6 weeks  
Cost: £3900 + VAT

