

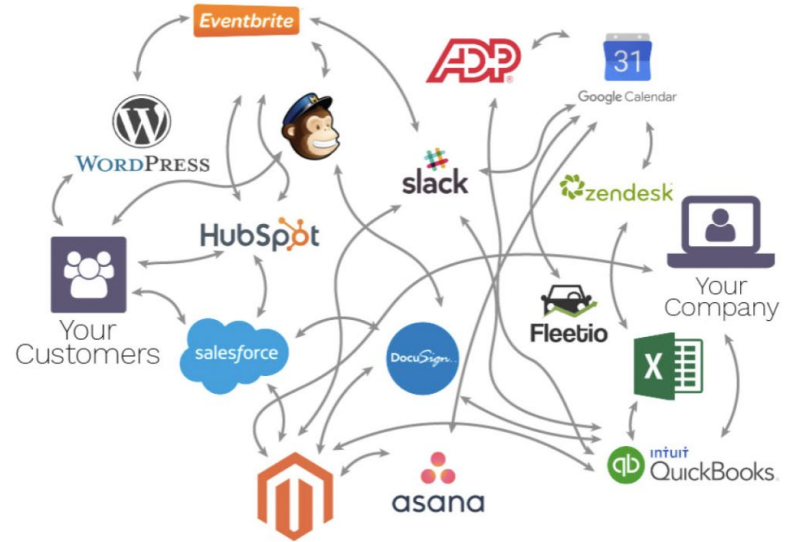
LOGO GOES HERE

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

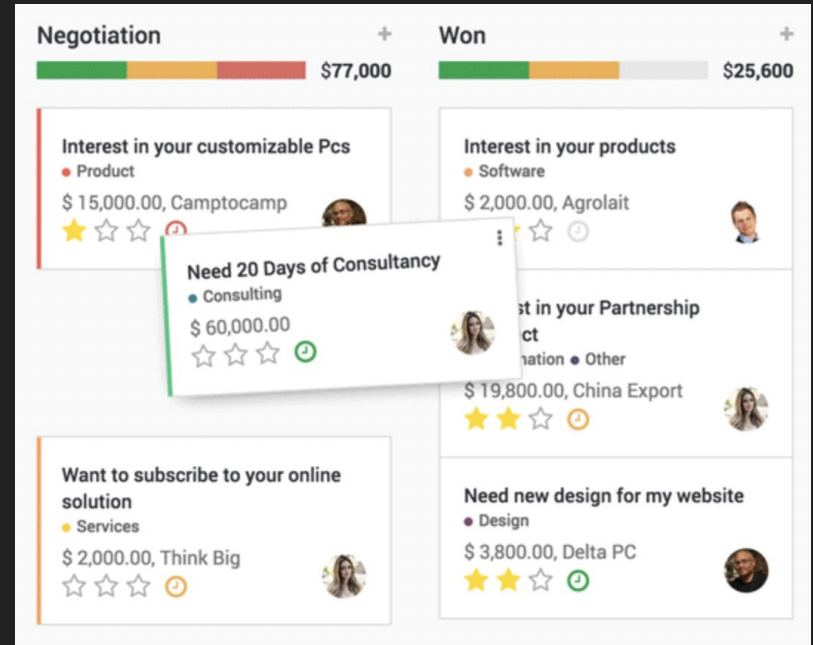
7. GAP Analysis for medium and large scope projects

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 three overlapping screenshots of a CRM application interface.

Top Screenshot (Main Pipeline View): Shows a Kanban board with four columns: **New** (\$69,600), **Qualified** (\$61,000), **Proposition** (\$24,500), and **Negotiation**. Each column contains cards representing sales opportunities. The top navigation bar includes 'CRM', 'Pipeline', 'Customers', 'Reporting', 'Configuration', and a user profile 'Administrator'.

Middle Screenshot (Opportunity Detail View): Displays the details for an opportunity titled 'Plan to buy RedHat servers'. It shows an expected revenue of \$25,000.00 and a probability of 30%. The customer is 'Agrolait' with contact information provided. The activity state is 'No next activity planned'. The salesperson is 'Europe'.

Bottom Screenshot (Communication Log View): Shows a log of messages and notes for the opportunity. It includes a note from 'YourCompany, Mitchell Admin' dated 'now' with the text 'Kanban State Label: Buzz or set as done → In Progress'. Another note from 'YourCompany, Mitchell Admin' dated '1 day ago' mentions 'Assigned to: Mitchell Admin → Joel Willis'. A third note from 'YourCompany, Mitchell Admin' dated '2 days ago' says 'Hello, Joel Williams.' and 'Good news! The project will be most likely done 2 days before the predicted time.' A final note from 'YourCompany, Mitchell Admin' dated '5 days ago' mentions '@Marc Demo' and asks for a description of the work.

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

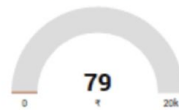
Total Invoiced



Mitchell Admin

Total Invoiced

Current Value



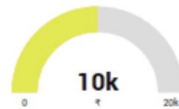
From 07/01/2019 To 07/31/2019



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
Subtotal:					\$ 11,655.00
Taxes:					\$ 0.00
Total:					\$ 11,655.00

Suggested Products

Products	Description		Price
Advanced CRM Functional	Advanced CRM Functional	10% discount	\$ 9,000.00 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 'Projects and Timesheet' software interface, which is fully integrated with Sales and Invoicing. The interface is divided into several sections:

- Top Navigation Bar:** Includes tabs for 'Project', 'Projects', 'All Tasks', 'Planning', 'Reporting', and 'Configuration'. It also shows the user's name 'My Company (San Francisco)' and a search bar.
- Tasks List:** A table with columns for 'Title', 'Project', 'Planned Hours', 'Hours Spent', 'Remaining Hours', 'Progress', and 'Stage'. It lists various tasks such as 'Filter replacement', 'Bathroom ventilation', 'Water Heater', 'Fix sink', '3-port Valve replacement', 'Noise Reduction', 'Install air extractor', 'Two radiators installation', 'Field Service', 'Energy Certificate', 'User interface improvements', 'Room 2: Decoration', 'Planning and budget', and 'Room 1: Decoration'.
- Calendar View:** A calendar showing the week of May 2020. It displays tasks scheduled for different days, such as 'Noise Reduction' on Tuesday, 'Lunch Room: kitchen' on Wednesday, and 'Meeting Room Furniture' on Thursday.
- Task Detail View:** A detailed view of a task titled 'Room 2: Decoration'. It shows the task's progress, assigned users, and a list of tasks. The task is assigned to 'Office Design' and 'Marc Demo'. It includes a 'Sales Order Item' and a 'Deadline' of 06/10/2020.
- Task List (Bottom Left):** A list of tasks with their status and progress. It includes 'Meeting Room Furniture' (14:00), 'Office planning' (22:30), 'Internal training' (05/06/2020), and 'Black Chairs for managers' (05/19/2020).
- Task Detail View (Bottom Center):** A detailed view of a task titled 'Room 2: Decoration'. It shows the task's progress, assigned users, and a list of tasks. The task is assigned to 'Office Design' and 'Marc Demo'. It includes a 'Sales Order Item' and a 'Deadline' of 06/10/2020.
- Task List (Bottom Right):** A list of tasks with their status and progress. It includes 'Meeting Room Furniture' (14:00), 'Office planning' (22:30), 'Internal training' (05/06/2020), and 'Black Chairs for managers' (05/19/2020).

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.

Accounting

OverviewCustomersVendorsAccountingReportingConfiguration

12

Invoices / INV/2019/0004

EDITCREATE

PrintAction

1 / 1 < >

SEND & PRINTREGISTER PAYMENTADD CREDIT NOTEPREVIEW

DRAFTOPENPAID

Send messageLog noteSchedule activityFollow3

INV/2019/0004

Customer

Deco Addict
325 Elsie Drive
Franklin WV 26807
United States

Invoice Date
01/13/2019

Due Date
01/13/2019

Delivery Address

Payment Terms
Immediate Payment

Salesperson
Sales Team

Marc Demo
Europe

Invoice Lines

Other Info

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

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

Group By

★ Favorites

1-4 / 4 < >

invoices.

Create Invoice

Create your first invoice.

Create

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	

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

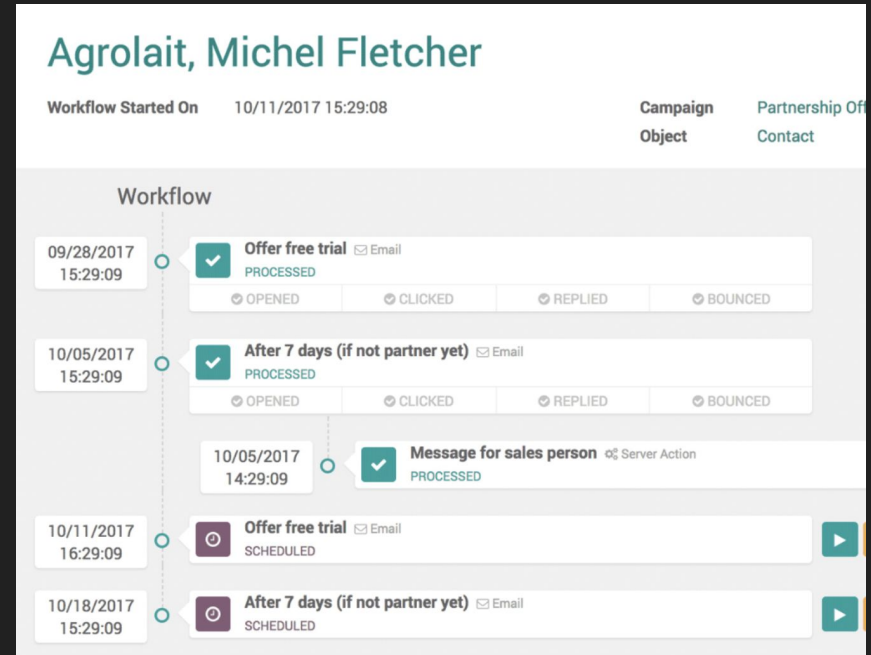
** - Any customisations that require development is agreed upfront and charge extra at £75 per hour.*

*** - 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



Centralized Social Media Streams

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

Feed

ADD A STREAM

NEW POST

SYNCHRONIZE

My Streams

By Stream

Search...

Filters

Group By

Favorites

f

Stealthy Wood

Insights

345

12%

532

5%

35

0%

t

Stealthy Wood

Insights

290

18%

127

32%

18

0%

f

Page Posts: Stealthy Wood

SW

Stealthy Wood

11/19/2019

Sales on Wooden Desk!

24

8

15 Shares

44 Views

SW

Stealthy Wood

11/07/2019

Working from home never looked this good 🍷
Homemade furniture.

19

2

17 Shares

82 Views

SW

Stealthy Wood

11/05/2019

Colors are also welcome. They bring life and

1

4

4 Retweets

t


Tweets of: Stealthy Wood

SW

Stealthy Wood

11/14/2019

We're in love with what could be the most modern couch!



8

2


4 Retweets

SW

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

Keyword: #odoo

Ronie Hart

2 hours

Odoo R&D peek - Ask your customers to sign your delivery orders ! #Odoo PS: it works also in mobile 🍷 <https://t.co/yJVK4VNGT>

2


3

2 Retweets

Anita Oliver

11/20/2019

Branded T-shirts: Use Case #Odoo Use Cases <https://t.co/fYWSna3imU>



7

14

4 Retweets

Mitchell 4dmin

07/10/2019

t

Tweets of: Odoo

Odoo

2 hours

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

12

2

Odoo

Nov. 7th
9am

Your Post

Post on

Message

Attach Images

Campaign

When

Scheduled post date

☐ [Push Notifications] My Website

☒ [Facebook] Stealthy Wood


☒ [Twitter] Stealthy Wood

Facebook Page

Published by Facebook Page • 2019-12-09 13:00:00 • Q

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

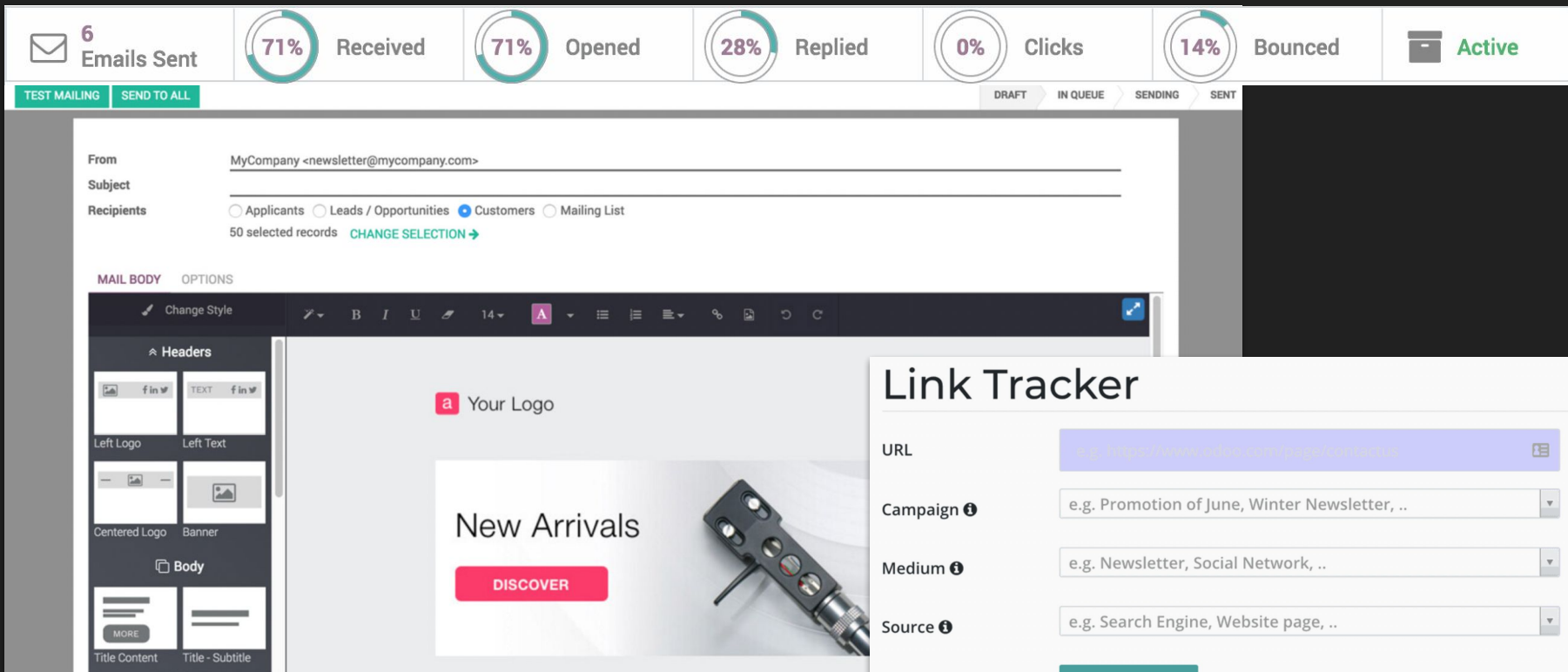
You don't get a second chance at making a good first impression.
Homemade furniture. Lobby idea 🍷

#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



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) ⓘ

Link Tracker / Xmas Promo

Xmas Promo

Original URL

<http://www.mywebsite.com/xmas-promo>

Campaign

XMas Promo

Tracked Link

<http://www.mywebsite.com/r/SXDdX0> ↗ copy

Medium

SMS

Redirected URL


http://www.mywebsite.com/xmas-promo?utm_campaign=XMas+Promo&utm_medium=SMS

Statistics

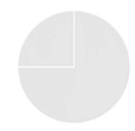
40 clicks

of clicks

2 countries



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



Country	Clicks
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

Ergonomics and ease of use

Community and contributors

Questions for developers

 [Home](#) [Shop](#) [Events](#) [Forum](#) [Blog](#) [Presentations](#) [Jobs](#) [Contact us](#) [Documentation](#) [Public Pricelist](#) [Administrator](#)

User Feedback Form

This survey should take less than five minutes.

[All surveys](#) [Finished surveys](#)

Ergonomics and ease of use

These questions relate to the ergonomics 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

Bar chart showing survey results for the question: What do you think about the documentation available on doc.odoo.com?

Response	Count
It is up-to-date	1
It helps in the beginning	1
I use the contextual help...	1
It is complete	2
It is clear	1

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

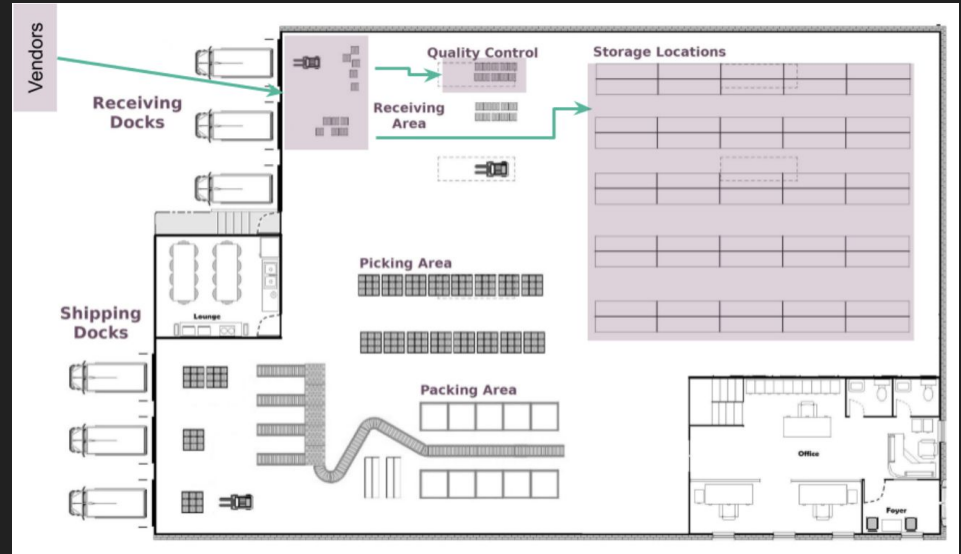
Implementation Cost*: £3900.00 + VAT

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.*

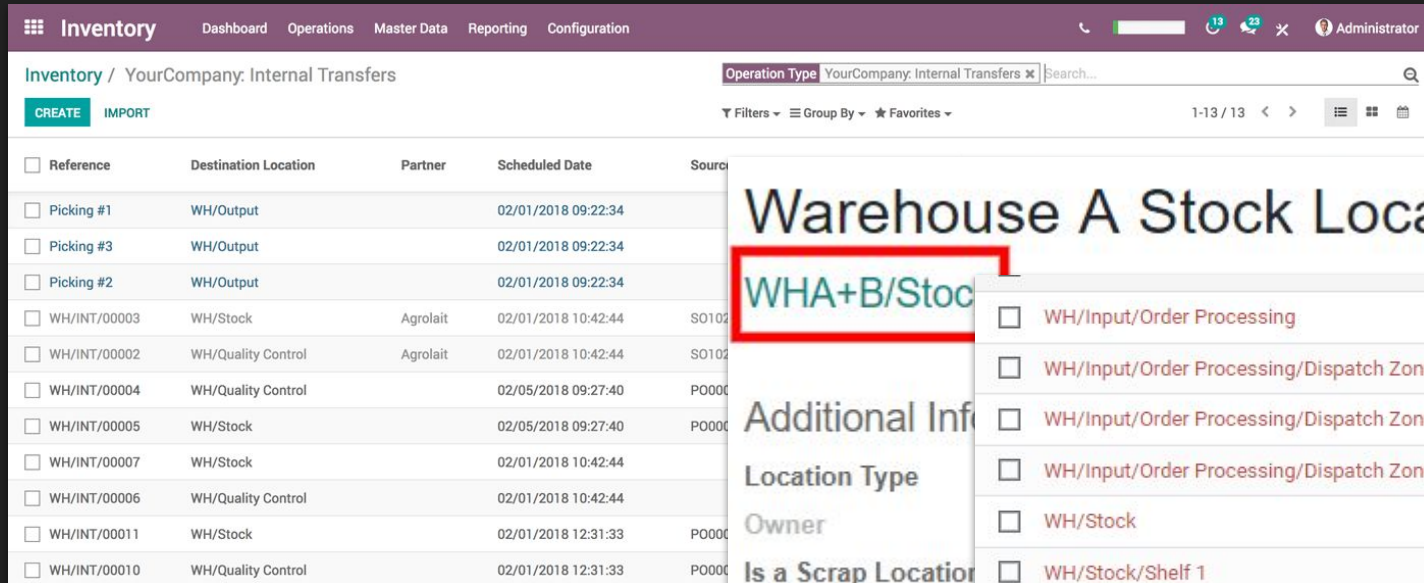
3. Warehouse & Procurement

- 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' module of a software application. The top navigation bar includes links for 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 locations. The selected location is 'WHA+B/Stock', which is highlighted with a red box. The dropdown menu also includes options for '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', and 'WH1/Output'.

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.

Inventory

DashboardOperationsMaster DataReportingConfiguration

13

23

Administrator

Inventory

Search...

Filters

Group By

Favorites

1-18 / 18

Receipts

YourCompany

5 TO RECEIVE

Late

4

Internal Transfers

YourCompany

1 TRANSFERS

Waiting Late

76

Pick

YourCompany

0 TRANSFERS

Pack

YourCompany

0 TRANSFERS

Waiting Late

22

Delivery Orders

YourCompany

4 TO DO

Waiting Late

1317

Manufacturing

YourCompany

3 TO DO

Receipts

My Company, Chicago

0 TO RECEIVE

Internal Transfers

My Company, Chicago

0 TRANSFERS

Delivery Orders

My Company, Chicago

0 TO DO

Inventory

Reordering Rules / OP/00004

SAVE

DISCARD

4 / 4

Active

Purchases

Name

OP/00004

Product

[E-COM10] Apple Wireless Keyboard

Warehouse

Chicago Warehouse

Location

Chic/Stock

Procurement Group

Rules

Minimum Quantity10.000

Maximum Quantity20.000

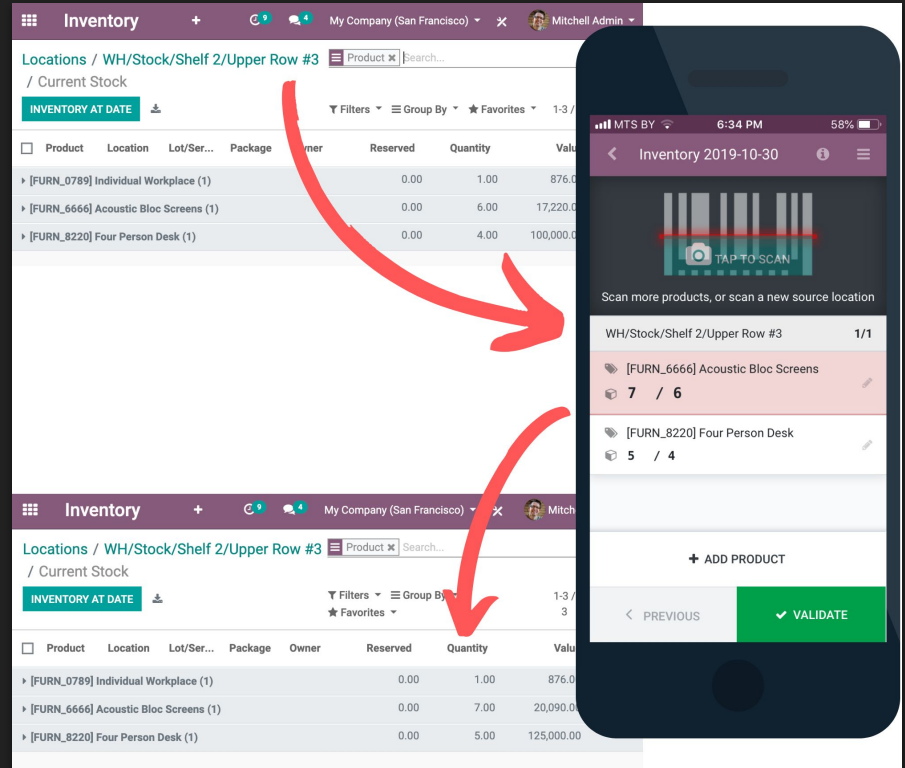
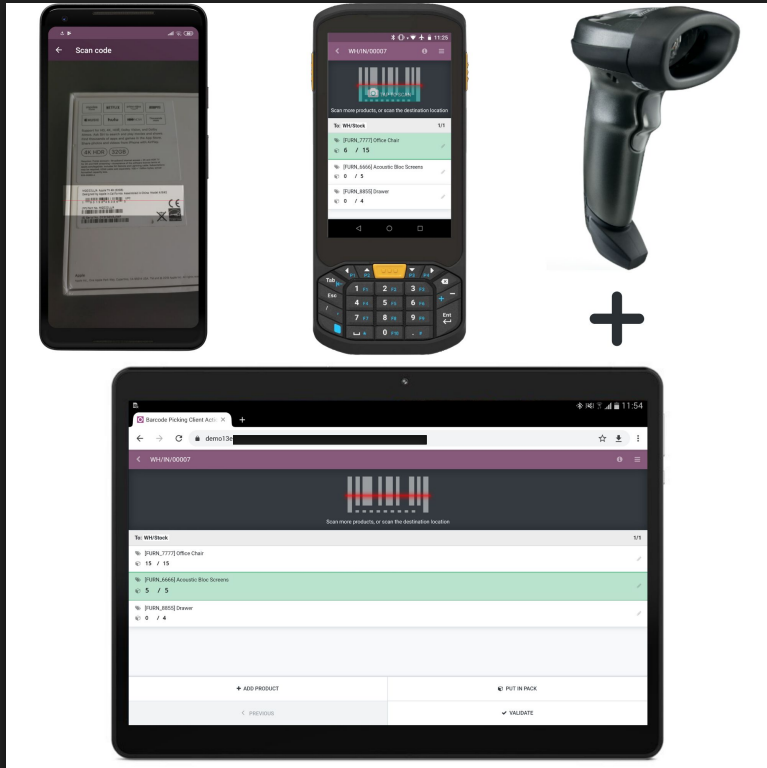
Quantity Multiple1.000

Misc

Lead Time1Day(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	<input checked="" type="radio"/> Reserve sale orders immediately on confirmation <input type="radio"/> Reserve sale orders manually or by running the schedulers
Multi Locations	<input type="radio"/> Do not record internal moves within a warehouse <input checked="" type="radio"/> Manage several locations per warehouse
Routes	<input type="radio"/> No automatic routing of products <input checked="" type="radio"/> Advanced routing of products using rules

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

Products

[Configure Product Barcodes](#)

Claims	<input type="radio"/> Do not manage claims <input checked="" type="radio"/> Allow claims on deliveries
--------	---

Dropshipping	<input type="radio"/> Suppliers always deliver to your warehouse(s) <input checked="" type="radio"/> Allow suppliers to deliver directly to your customers
--------------	---

Picking Waves	<input type="radio"/> Manage pickings one at a time <input checked="" type="radio"/> Manage picking in batch per worker
---------------	--

Minimum Stock Rules	<input type="radio"/> Set lead times in calendar days (easy) <input checked="" type="radio"/> 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

OrdersProductsReportingConfiguration

36

5

My Company (San Francisco)

Mitchell Admin

Requests for Quotation

CREATE

Filters

Group By

Favorites

1-22 / 22

All RFQs11 To Send0 Waiting11 Late

My RFQs909

Avg Order Value (\$)7897.48

Lead Time to Purchase2.57 Days

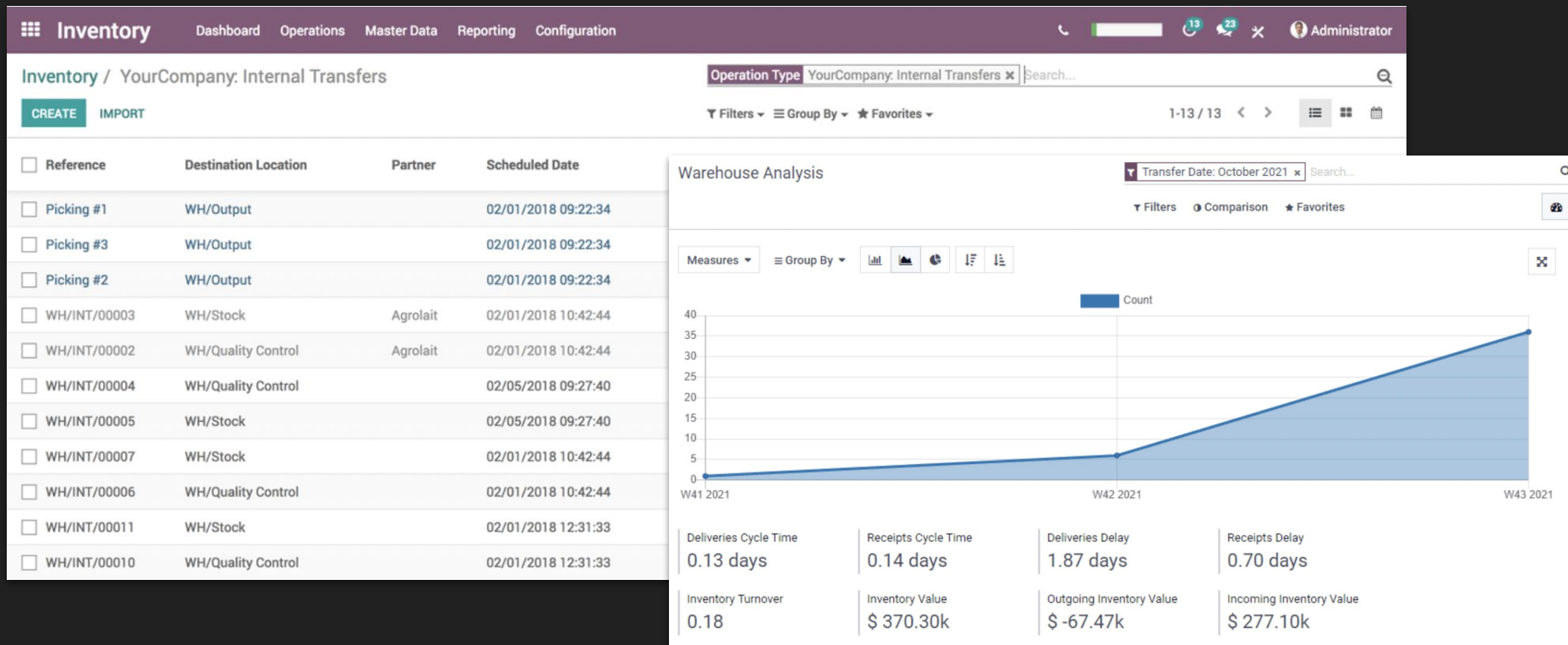
Purchased Last 7 Days (\$)77901.83

RFQs Sent Last 7 Days0

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

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.



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 xlsx 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

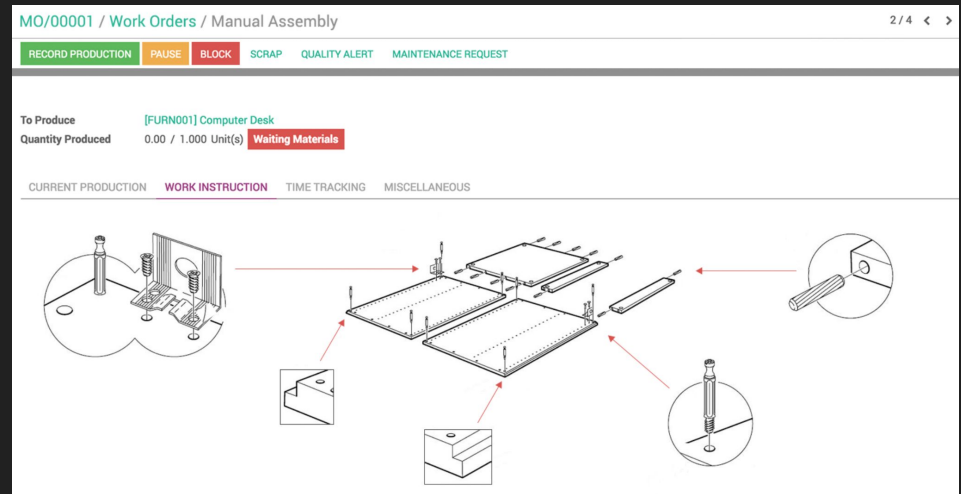
Open-source Software Cost**: £90.00 / month for hosting only

** - 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 top navigation bar includes links for Dashboard, Changes, Master Data, Reporting, and Configuration. The main content area shows a list of ECOs under the 'Engineering' filter. A detailed view of ECO0007 is shown, including a 'Short Summary' and a 'Components' table. A red box highlights the 'Apply on Variants' section, which allows selecting specific product variants for the change.

PLM Dashboard / Engineering Change Orders

CREATE IMPORT

New

- ECO0007 [E-COM07] iPad Mini
- ECO0010 [E-COM05] Bose Mini Bluetooth Speaker
- ECO0011 Routing: Custom Assembly Line

Engineering

- ECO0009 Routing: Assembly Line 1
- ECO0013 [C-Case] Computer Case
- ECO0018 [E-COM07] iPad Mini

Re-tool

PLM Dashboard / Engineering Change Orders / ECO0007

SAVE DISCARD

START NEW REVISION

NEW ENGINEERING RE-TOOL MACHINERY EFFECTIVE REFUSED

Active

Short Summary ECO0007

Type: Apply on

New Product

- Product Change
- Bill of Materials
- Routing
- BoM and Assembly Line

Product: [E-COM07] iPad Mini

Bill of Materials: [E-COM07] iPad Mini

Routing: [E-COM07] iPad Mini

Product Custom Computer Kit

Product Variant

Quantity 1.00 Units

Reference

BoM Type

- Manufacture this product
- Kit
- Subcontracting

Company

My Company (San Francisco)

Components

Component	Quantity	Product Unit of Measure
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

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 📞 🕒 17 📧 24 ✕ 👤 Administrator

Manufacturing Orders Status Search... 🔍

CREATE IMPORT 🔽 Filters ≡ Group By ★ Favorites ☰ 📅 📊 📋

Cancelled

[FURN001] Table	1.000 Unit(s)
MO/00027 02/09/2018	Cancelled
[PCSC234] Computer SC234	10.000 Unit(s)
MO/00028 02/09/2018	Cancelled
[FURN001] Table	1.000 Unit(s)
MO/00027 02/09/2018	Cancelled
[HDD-DEM] HDD on Demand	10.000 Unit(s)
MO/00028 02/09/2018	Cancelled
[FURN001] Table	1.000 Unit(s)
MO/00023 02/09/2018	Cancelled

Confirmed

[HDD-DEM] HDD on Demand	1.000 Unit(s)
MO/00002 02/09/2018	Confirmed
[FURN001] Table	1.000 Unit(s)
MO/00003 02/09/2018	Confirmed
[FURN001] Table	1.000 Unit(s)
MO/00021 02/09/2018	Confirmed
[FURN001] Table	1.000 Unit(s)
MO/00022 02/09/2018	Confirmed

Done

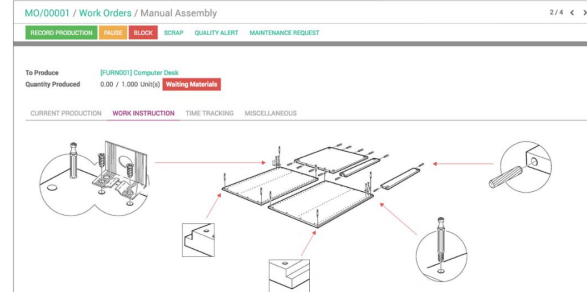
[LAP-CUS] Laptop Customized	5.000 Unit(s)
-----------------------------	---------------

Planned

[PCSC234] Computer SC234	4.000 Unit(s)
--------------------------	---------------

Workcenter Control Panel

- ✓ Track Time
- ✓ Display Worksheets
- ✓ Register Production



- ✓ Integrate Quality checks
- ✓ In Process Alerts
- ✓ Record Serial/lot number

Use make-to-order rules, minimum stock rules or the master production schedule to automate procurements. Let the scheduler compute everything for you. Use routes, constraints and lead time to optimize inventory level and avoid shortages.

Master Production Schedule

REPLENISH ADD A PRODUCT

[FURN_7800] Desk Combination by Units

	Week 28	Week 29	Week 30	Week 31	Week 32	Week 33	Week 34	Week 35	Week 36	Week 37	Week 38	Week 39	Week 40
+ Starting Inventory	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000
- Demand Forecast (Actual Demand)	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
+ To Replenish REPLENISH	0 <...< 20	20.000	20.000	20.000	20.000	20.000	20.000	5.000	5.000	5.000	5.000	5.000	5.000
= Forecasted Stock	5	-80.000	-100.000	-80.000	-60.000	-60.000	-60.000	0.000	5.000	5.000	5.000	5.000	5.000
(Available to Promise)		-36.000	-60.000	-80.000	-60.000	-60.000	-60.000	0.000	5.000	5.000	5.000	5.000	5.000

[FURN_0269] Office Chair Black by Units

Actual Replenishment [FURN_0269] Office Chair Black Week 2 (2022-01-03 - 2022-01-09)

5 REQUESTS FOR QUOTATION 0 RECEIPTS 0 MANUFACTURING ORDERS

CLOSE

Actual Replenishment
Forecasted Stock
Available to Promise

Quality Control

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

☰ Quality

DashboardQuality ControlReportingConfiguration

📞19📧24✖️👤 Administrator

Quality Alerts

Search...

CREATEIMPORT


▼ Filters ▾ ≡ Group By ▾ ★ Favorites ▾


☰☰☰☰☰


New


Confirmed


Action Proposed


[E-COM10] Apple Wireless Keyboard
QA00001
★ ★ ☆


[HDD-SH1] HDD SH-1
QA00005
☆ ☆ ☆


[CONS_DEL02] Little server
QA00009
★ ☆ ☆

[E-COM10] Apple Wireless Keyboard
QA00002
☆ ☆ ☆

[E-COM08] Apple In-Ear Headphones
QA00004
★ ★ ☆

[E-COM05] Bose Mini Bluetooth Speaker
QA00003
★ ☆ ☆

iPad Retina Display
QA00007
☆ ☆ ☆

[E-COM08] Apple In-Ear Headphones
QA00010
☆ ☆ ☆

☰ Quality

DashboardQuality ControlReportingConfiguration

📞19📧24✖️👤 Administrator

Quality Control Points

Product Search...

CREATEIMPORT

▼ Filters ▾ ≡ Group By ▾ ★ Favorites ▾

☰☰☰☰☰

	Product	Operation Type
▼ [PCSC234] Computer SC234 (1)		
<input type="checkbox"/> +	QCP00020 [PCSC234] Computer SC234	YourCompany: Manufacturing
▼ [PROD_DEL02] Datasheet (1)		
<input type="checkbox"/> +	QCP00002 [PROD_DEL02] Datasheet	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

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.

[illegible]

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

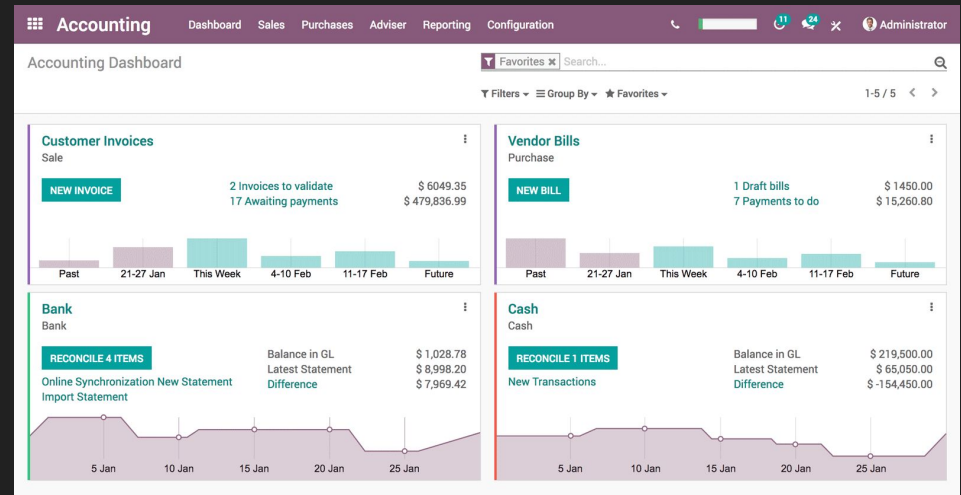
Implementation Cost*: £17550.00 - £26325.00 + VAT

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

OverviewCustomersVendorsAccountingReportingConfiguration

13

Accounting

Invoices / INV/2019/0004

EDITCREATE

PrintAction

1 / 1

SEND & PRINTREGISTER PAYMENTADD CREDIT NOTEPREVIEW

DRAFTOPENPAID

Send messageLog noteSchedule activityFollow

INV/2019/0004

Customer

Deco Addict
325 Elsie Drive
Franklin WV 26807
United States

Invoice Date

01/13/2019

Due Date

01/13/2019

Salesperson

Marc Demo

Sales Team

Europe

Delivery Address

Payment Terms

Immediate Payment

Invoice Lines

Other Info

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

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

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 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

Invoice Date: 07/08/2020 Due Date: 08/07/2020

Description	Quantity	Unit Price	Taxes	Amount
[FURN_8998] Three-Seater Sofa	5.000	1,500.00	15.00%	\$ 7,500.00
Three-Seater 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

+1 (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.

Expenses

My Expenses

Expense Reports

Reporting

Configuration

20

2

My Company

Mitchell Admin

My Expenses

Status Search...

CREATE IMPORT

Filters Group By Favorites

Approved4

To Submit4

Refused3

Submitted

Hotel Expenses2,000.00 €

Mitchell Admin10/17/2019

Approved

Lunch56.80 €

Mitchell Admin10/15/2019

Approved

Lunch with Customer152.80 €

Mitchell Admin10/13/2019

Approved

Travel by Air700.00 €

Mitchell Admin10/12/2019

Approved

Flight to Seattle\$ 700.00

Mitchell Admin10/30/2019

To Submit

Laptop889.00 €

Mitchell Admin04/03/2019

To Submit

Screen289.00 €

Mitchell Admin04/03/2019

To Submit

Car tyres450.32 €

Randall Lewis03/15/2019

To Submit

Paintball300.00 €

Keith Byrd10/05/2019

Refused

Drinks42.50 €

Keith Byrd10/05/2019

Refused

Pizzas150.00 €

Keith Byrd10/05/2019

Refused

Lamp

Ronnie H06/02/20

Chairs

Ronnie H06/02/20

Lunch with

Marc D01/15/20

Travel by

Marc D01/15/20

Business Trip

EmployeePieter Parker

Payment ByEmployee (to reimburse)

Expense Lines

Other Info

Expense Date	Expense Description	Analytic Account	Total
03/15/2018	Gifts baskets		1 \$ 75.44
02/12/2018	Car Rental	Camp to Camp - Camptocamp	2 \$ 250.00
02/12/2018	Hotel Accomodation	Camp to Camp - Camptocamp	4 \$ 400.00
02/09/2018	Travel by Air	Our Super Product - Agrolait	1 700.00 €

Send message

Log note

Today

Following

1

YourCompany, Administrator

Expense report submitted, waiting approval

Status: Submitted

Reconciliation

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

Accounting

DashboardCustomersVendorsAccountingReportingConfiguration

536✕Demo CompanyMitchell Admin

Accounting Dashboard / Bank

Search...

Deco Addict

VALIDATE

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

Deco Addict

VALIDATE

101404	01/01/2022	INV/2022/00002	\$ 750.00	
121000	08/07/2022	INV/2022/00002		<div>\$ 48,012.50</div> <div>\$ 750.00</div>

Select Partner

10140401/01/2022

Azure Interior

10140401/01/2022

12100008/31/2022

Deco Addict

VALIDATE

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

Customer/Vendor Matching

Manual Operations

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

12100008/07/2022INV/2022/00002\$ 47,915.83

12100008/07/2022INV/2022/00003\$ 22,137.50

12100008/13/2022INV/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 process of sending VAT returns to HMRC.

Top Screenshot: VAT Return Form

- Navigation: Accounting > Overview > Customers > Vendors > Accounting > Reporting > Configuration
- Form Title: VAT Return
- Buttons: **SEND TO HMRC** (highlighted), PRINT PREVIEW, EXPORT (XLSX)
- Filters: Dec 2018, Comparison: No comparison, Options: Posted Entries Only

Middle Screenshot: HMRC VAT Obligations

- Navigation: Accounting > Overview > Customers > Vendors > Accounting > Reporting > Configuration
- Form Title: HMRC VAT Obligations / 2017-03-07 (2017-01-01 - 2017-01-31)
- Buttons: EDIT, CREATE
- Table Data:

Field	Value
Period Start	01/01/2017
Period End	01/31/2017
Period Due	03/07/2017
Period Status	Open
Received Submission date	
Period Key	18AD

Bottom Screenshot: United Kingdom VAT Return VAT Obligations

- Navigation: Accounting > Overview > Customers > Vendors > Accounting > Reporting > Configuration
- Form Title: United Kingdom VAT Return VAT Obligations
- Buttons: **SEND TO HMRC** (highlighted)
- Form Content:

United Kingdom
VAT Return
VAT Obligations

Reporting Configuration

1 / 1 < >

Send message Log note Schedule activity

Following 1

Yesterday

YourCompany, Mitchell Admin 1 day ago
Tax return successfully posted.
Date Processed: 2018-12-12T10:27:37.255Z
Payment Indicator: BANK
Form Bundle Number: 501907209106

Sent Values:
vatDueSales: 0.0
vatDueAcquisitions: 0.0
totalVatDue: 0.0
vatReclaimedCurrPeriod: 0.0
netVatDue: 0.0
totalValueSalesExVAT: 0
totalValuePurchasesExVAT: 0
totalValueGoodsSuppliedExVAT: 0
totalAcquisitionsExVAT: 0
periodKey: 18AD
finalised: True

YourCompany, Mitchell Admin 1 day ago
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

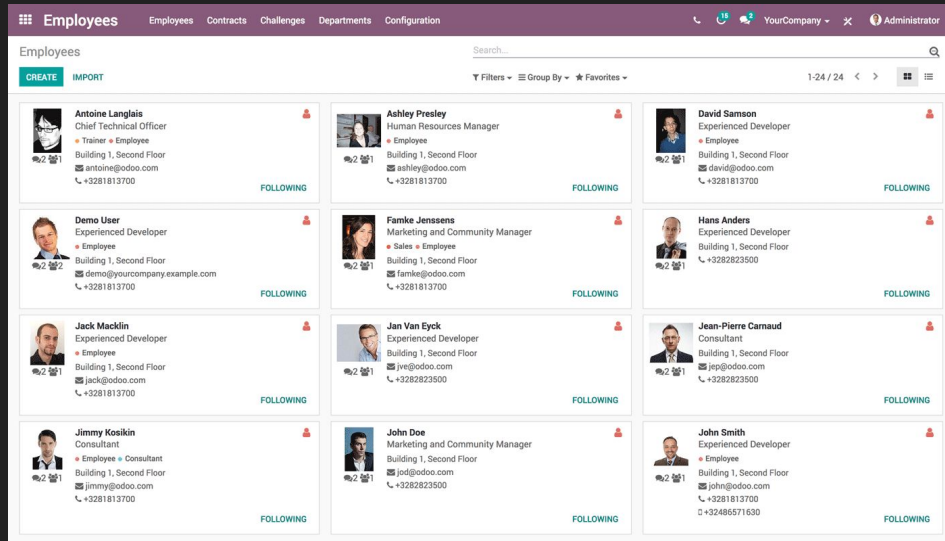
Enterprise Software Cost**: Free or €30.00 / month + €22.50 / User / Month

** - 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.*

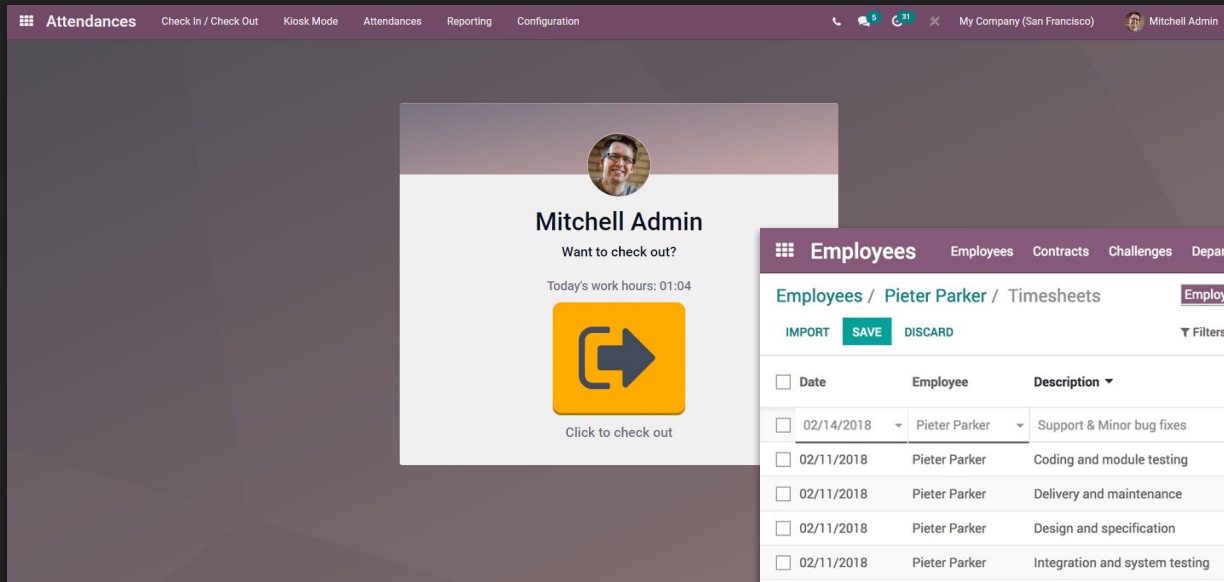
6. HR & Talent Acquisition

- 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 'Employees / Pieter Parker / Timesheets' page. The navigation bar includes 'Employees', 'Contracts', 'Challenges', 'Departments', and 'Configuration'. The user is logged in as 'Administrator'. The page title is 'Employees / Pieter Parker / Timesheets'. Below the title, there are buttons for 'IMPORT', 'SAVE', and 'DISCARD'. A search bar contains 'Employee Pieter Parker'. The table below lists timesheet entries with columns for Date, Employee, Description, Project, Task, and Time (Hours). The table shows 8 entries, with the first entry being expanded to show details. The total time for the month is 11:30.

<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.

Leaves																
Overview My Leaves Managers Reporting Configuration																
All Leaves																
Current Year Employee Search...																
Filters Group By Favorites																
Garntt 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

Pieter Parker on Legal Leaves 2015

Legal Leaves 2015

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.

Expenses

My Expenses

Expense Reports

Reporting

Configuration

20

2

My Company

Mitchell Admin

My Expenses

Status

Search...

CREATE

IMPORT

Filters

Group By

Favorites

Approved

+

4

Hotel Expenses

2,000.00 €

Mitchell Admin

10/17/2019

Approved

Lunch

56.80 €

Mitchell Admin

10/15/2019

Approved

Lunch with Customer

152.80 €

Mitchell Admin

10/13/2019

Approved

Travel by Air

700.00 €

Mitchell Admin

10/12/2019

Approved

To Submit

+

4

Flight to Seattle

\$ 700.00

Mitchell Admin

10/30/2019

To Submit

Laptop

889.00 €

Mitchell Admin

04/03/2019

To Submit

Screen

289.00 €

Mitchell Admin

04/03/2019

To Submit

Car tyres

450.32 €

Randall Lewis

03/15/2019

To Submit

Refused

+

3

Paintball

300.00 €

Keith Byrd

10/05/2019

Refused

Drinks

42.50 €

Keith Byrd

10/05/2019

Refused

Pizzas

150.00 €

Keith Byrd

10/05/2019

Refused

Submitted

+

Lamp

Ronnie H

06/02/2019

Chairs

Ronnie H

06/02/2019

Lunch with

Marc Des

01/15/2019

Travel by

Marc Des

01/15/2019

8 Documents

Business Trip

Employee

Pieter Parker

Payment By

Employee (to reimburse)

Expense Lines

Other Info

Expense Date	Expense Description	Analytic Account	Total
03/15/2018	Gifts baskets		1 \$ 75.44
02/12/2018	Car Rental	Camp to Camp - Camptocamp	2 \$ 250.00
02/12/2018	Hotel Accomodation	Camp to Camp - Camptocamp	4 \$ 400.00
02/09/2018	Travel by Air	Our Super Product - Agrolait	1 700.00 €

Send message

Log note

Today

Following

1

YourCompany, Administrator

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.

Appraisal Appraisal Reporting

Appraisal

CREATE IMPORT

<input type="checkbox"/> Name	Appraisal Deadline
<input type="checkbox"/> Mitchell Admin	01/30/2019

Employee Appraisal Form

Edit Pages and Questions Options

Page Title Questions

Employee Appraisal Form 5 records

Work Plan

Employee Performance in Key Areas

Professional Development and Performance

Employee Comments

START APPRAISAL AND SEND FORMS

TO START APPRAISAL SENT DONE

0 Answers

Mitchell Admin

Department Management

Appraisal Deadline 01/30/2019

Plan

Evaluation Back to Survey

Engagement

	1	2	3	4	5
I am proud to tell others I work here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My job provides me with a sense of personal accomplishment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would prefer to remain with this company even if a comparable job were available in another company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taking everything into account, how satisfied are you with your current job?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am willing to put in a great deal of effort beyond what is expected to help my workgroup succeed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

Recruitment

Applications

Reporting

Configuration

13

2

My Company (San Francisco)

Mitchell Admin

Job Positions

CREATEIMPORT

FiltersGroup ByFavorites

1-7 / 7

COMPANY

All

BE Company

My Belgian Company

My Company (Chicago)

My Company (San Francisco)

RESPONSIBLE

All

Carnille Watkins

Frances Pierce

Joel Willis

Judy Garza

Marc Demo

Mitchell Admin

Toni Buchanan

Marketing and Community Manager

5 APPLICATIONS

3 New Applications

3 To Recruit

Job Description

Share Trackers

Consultant

1 APPLICATIONS

0 New Applications

1 To Recruit

Job Description

Share Trackers

Human Resources Manager

2 APPLICATIONS

0 New Applications

1 To Recruit

Job Description

Share Trackers

Experienced Developer

6 APPLICATIONS

4 New Applications

4 To Recruit

2 Meetings

Start Interview

Print Interview

0 Contracts

Full Stack Developer

Kelly Wallant

Email

Phone

Mobile

Degree

kelly.wallant@mymailbox.com

879895515

Graduate

Tags

Responsible

Appreciation

Referred By User

IT

Mitchell Admin

★★★★

Job

Applied Job

Department

Company

Experienced Developer

Research & Development

My Company (San Francisco)

Contract

Expected Salary

Proposed Salary

Availability

4,000.00

3,800.00

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.

Payslips To Pay

Search...

CREATE

PRINT

Filters Group By Favourites

1-4 / 4

Reference	Employee	Batch Name	From	To	Company	Basic Wage	Net Wage	Status
<input type="checkbox"/> SLIP601	Mitchell Admin	June 2021	01/06/2021	30/06/2021	My Company (San Francisco)	\$ 0.00	\$ 0.00	Draft
<input type="checkbox"/> SLIP602	Marc Demo	June 2021	01/06/2021					
<input type="checkbox"/> SLIP501	Mitchell Admin	May 2021	01/05/2021					
<input type="checkbox"/> SLIP502	Marc Demo	May 2021	01/05/2021					

Payroll

Employees Work Entries Payslips Reporting Configuration

Work Entry / July 2020 / Payslips / Salary Slip - Mitchell Admin - July 2020

EDIT CREATE

Print Action

7 / 7

Period 07/01/2020 - 07/31/2020

Reference SLIP/007

Structure Regular Pay

Contract Contract For Mitchell Admin

Company Car

Payslip Name Salary Slip - Mitchell Admin - July 2020

Worked Days & Inputs

Salary Computation

Accounting Information

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

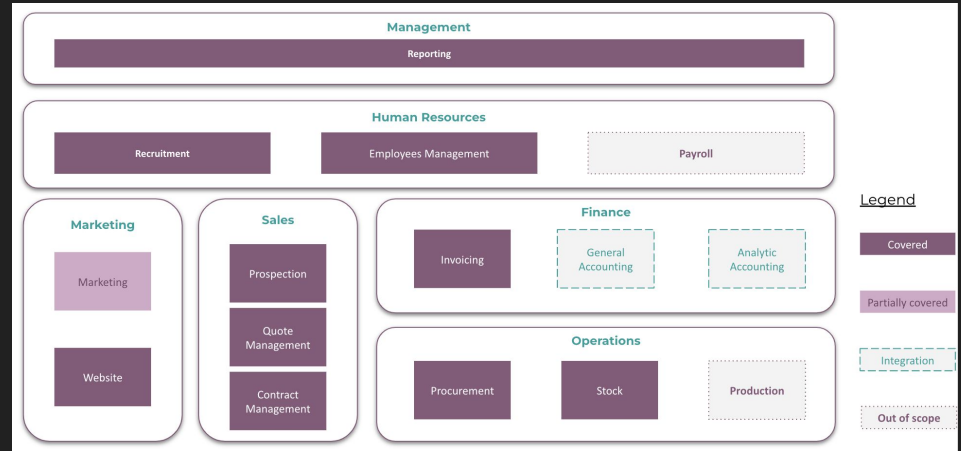
20 user example: €930.00 / month

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

