TEFUGEN
Technologies for Future Generation

ODOO ERP

Sales Order
To
Invoice Process Flow

- **ODOO ERP Written in** Python, Javascript, XML and PostgreSQL **Database.**
- 100% User-Level Licence-free under Affero General Public Licence.
- Support Public, Private and Hybrid offerings on Cloud.
- Can readily be integrated with Amazon web services & Google Cloud.
- 100% Ownership as it is fully Opensource and highly secured over cloud.
  Can be deployed on secure environment of Ubuntu and Redhat OS.

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Introduction

- Tefugen's Odoo ERP Base modules and the Value-Adds feature.
- In this presentation, we discuss on Lead Generation To Sales Invoice Process for managing our daily transactions.

Our Odoo ERP
Base module features

★ Option # 1 : General

Sales	Purchase	Warehouse	Inventory
Accounting	Human Resource	Admin	Payroll

OR

★ Option # 2 : Manufacturing Resource Planning(MRN)

Sales	Purchase	Warehouse	Inventory
Accounting	Manufacturing	Quality Analysis	Admin

Tefugen's Base Module Value-Adds

- **Report Template designs**

Sales Order | Purchase Order | Sales Invoice
Delivery Order | Goods-Receipt Note | Goods-Inward Note

- **Configuration Setup**

Client's name & Logo updation | Document Serial Number
Outgoing Email Server Setup | Tax creation
Payslip generation for the Manual entry | Account configuration

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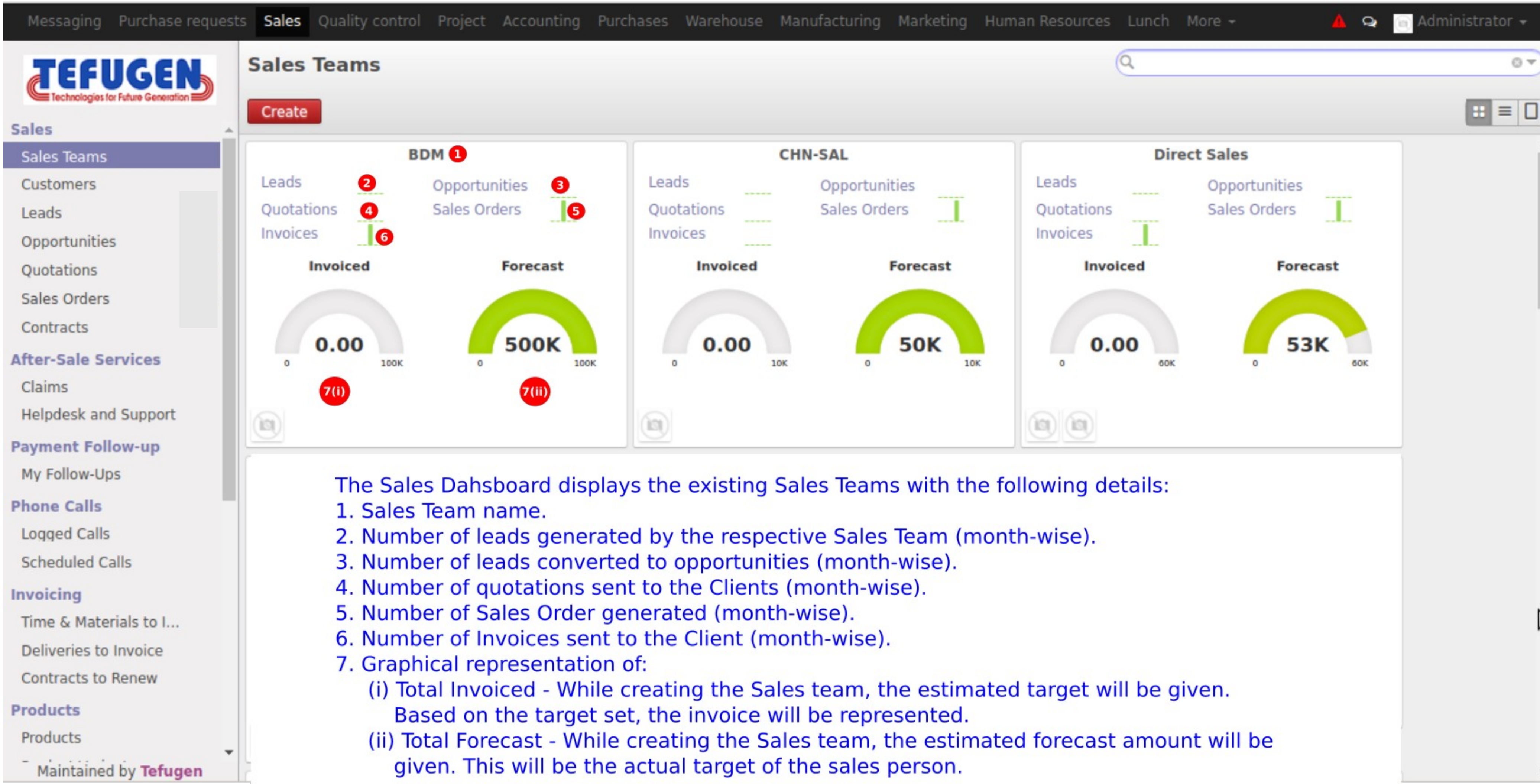
Sales Dashboard



The Sales Dahsboard displays the existing Sales Teams with the following details:

1. Sales Team name.
2. Number of leads generated by the respective Sales Team (month-wise).
3. Number of leads converted to opportunities (month-wise).
4. Number of quotations sent to the Clients (month-wise).
5. Number of Sales Order generated (month-wise).
6. Number of Invoices sent to the Client (month-wise).
7. Graphical representation of:
   (i) Total Invoiced - While creating the Sales team, the estimated target will be given. Based on the target set, the invoice will be represented.
   (ii) Total Forecast - While creating the Sales team, the estimated forecast amount will be given. This will be the actual target of the sales person.

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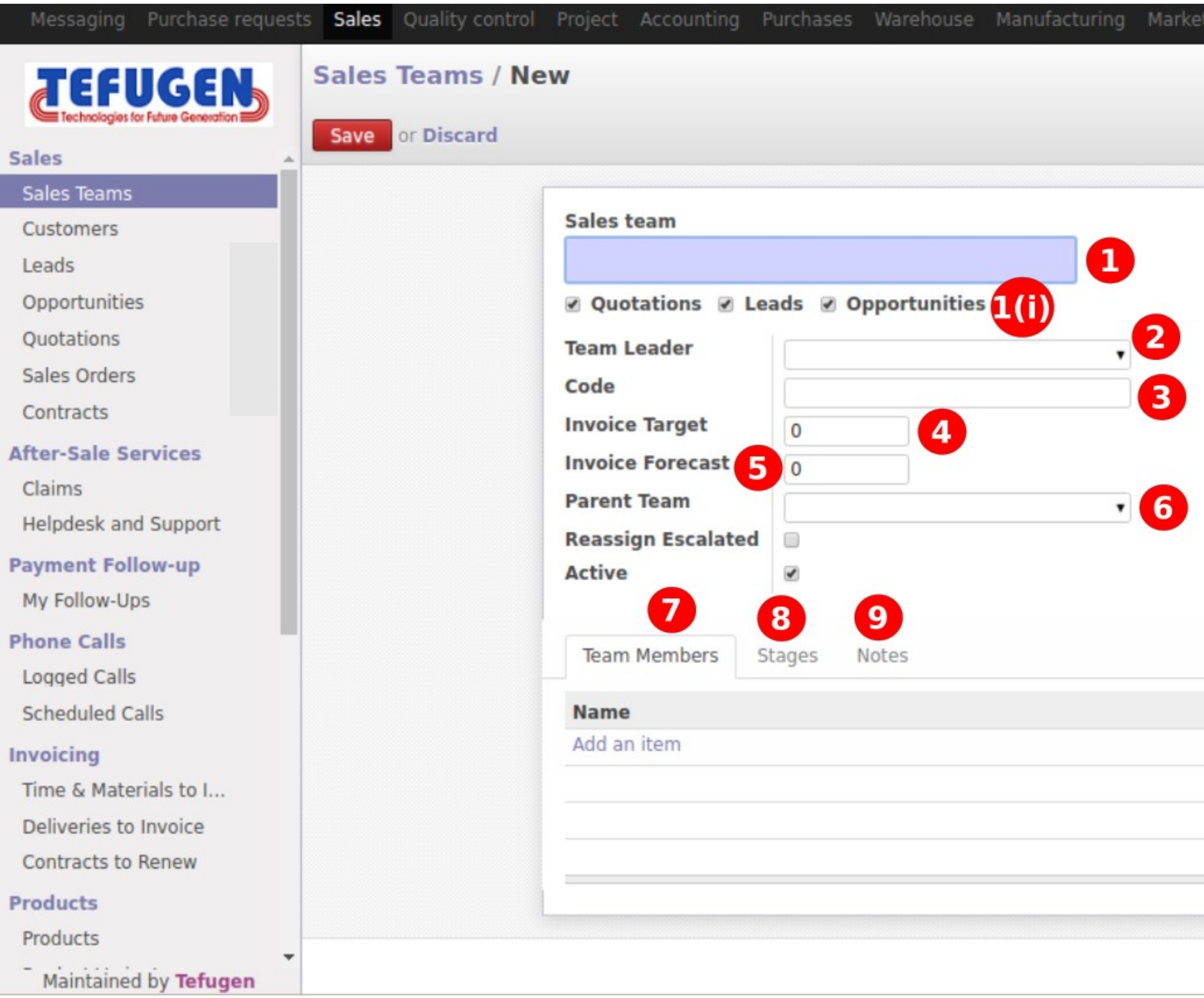
Creating Sales Team



Creating Sales Teams with the following details:

1. Sales Team name.
   (i) We can mention the involvement of the sales team on various required stages (Quotation, Leads, Qualification).
2. Name of the Team Leader. A list of existing team leader will be shown in the drop-down or a new team leader can be created (Refer Slide# 5).
3. An unique code for the sales team can be set for internal references.
4. Invoice target is the amount set to achieve the sales.
5. Invoice forecast is the estimated expected amount from the sales.
6. Name of the Parent Team Leader if exist will be selected. A list of existing parent team will be shown in the drop-down or a new parent team can be created (Refer Slide# 6).
7. A New Team Members can be added by entering the basic required details (Refer Slide#7).
8. Stages like Quotation, Lead, Qualification, etc., can be newly created.
9. Any additional notes can be mentioned in the notes tab.

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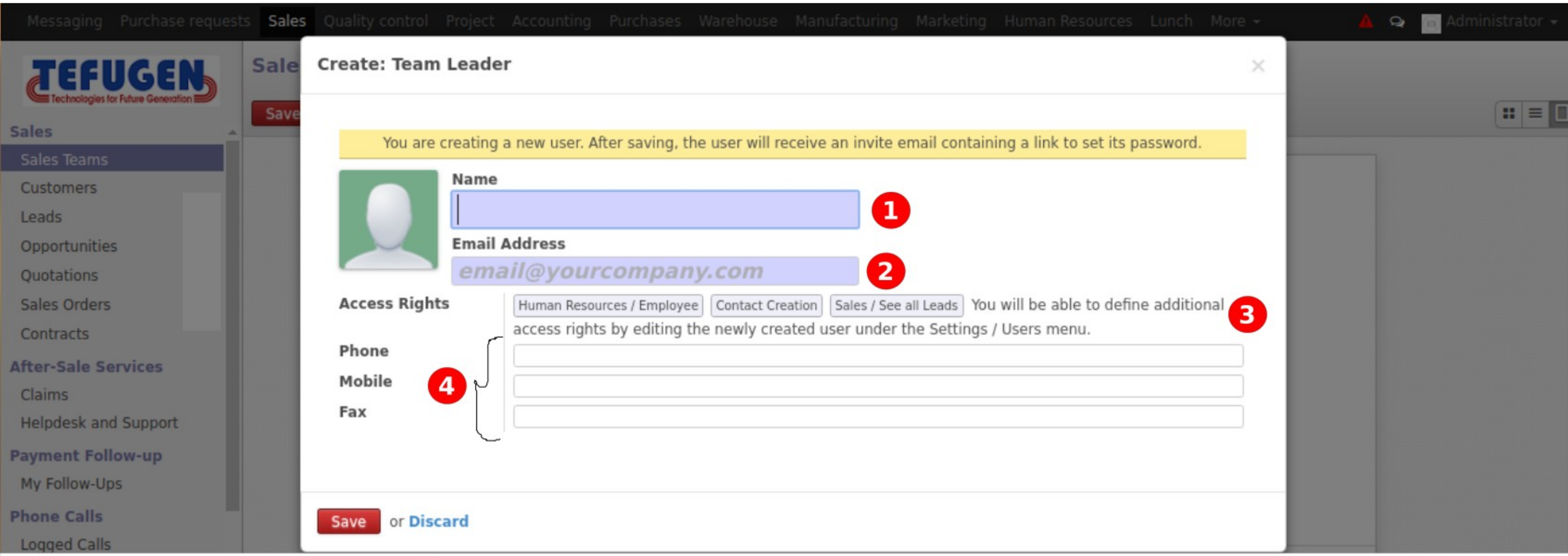
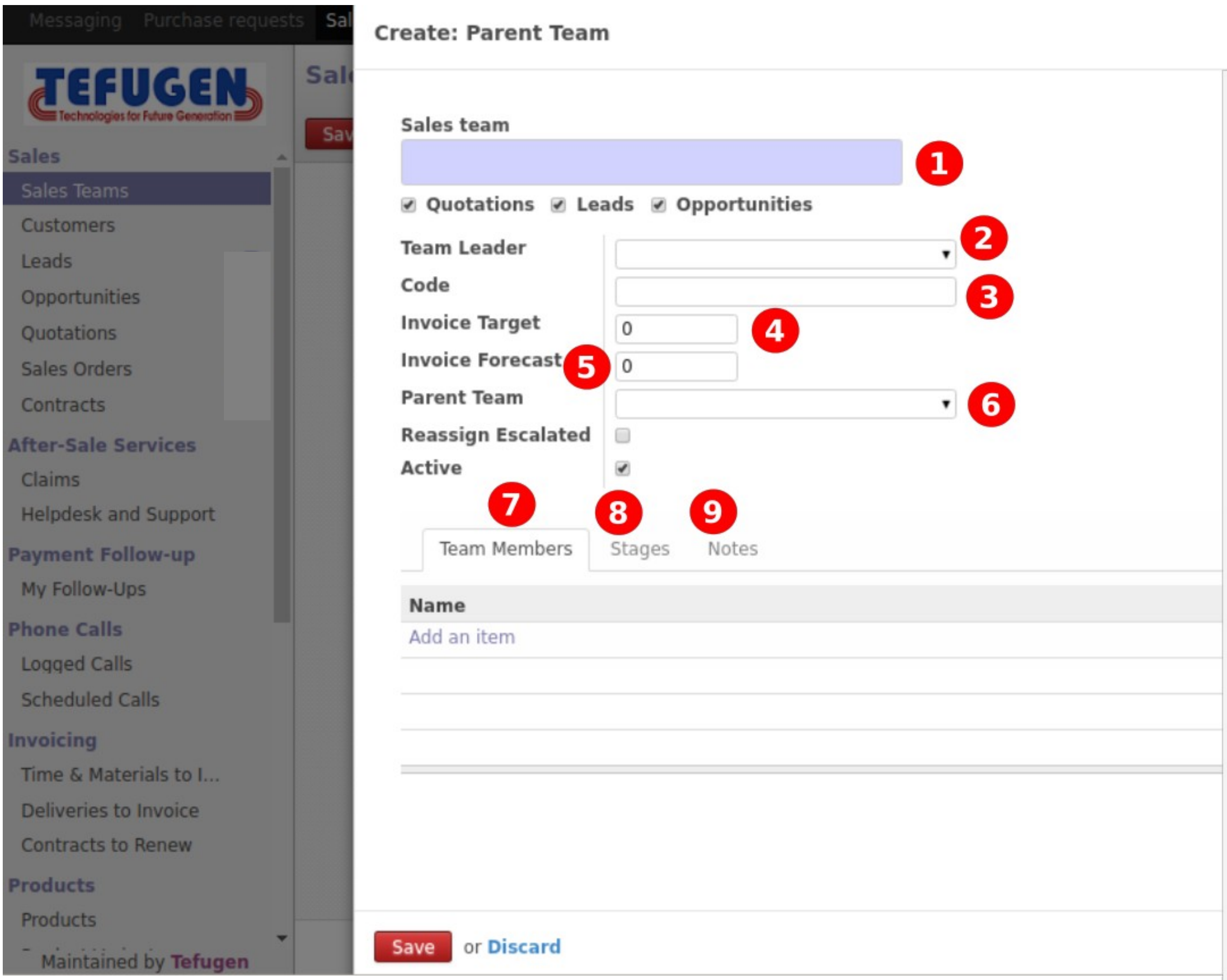
Creating Team Leader



Creating Team leader with the following details:

1. Team leader name.
2. email address of the respective team leader.
3. If a team leader has responsibility on multiple departments, then the access rights can be given to the various departments.
4. Contact details of the Team Leader.

Creating Parent Team



Creating Parent Teams with the following details:

1. Parent Team name.
   (i) We can mention the involvement of the parent team on various required stages (Quotation, Leads, Qualification).
2. Name of the Team Leader. A list of existing team leader will be shown in the drop-down or a new team leader can be created (Refer Slide# 5).
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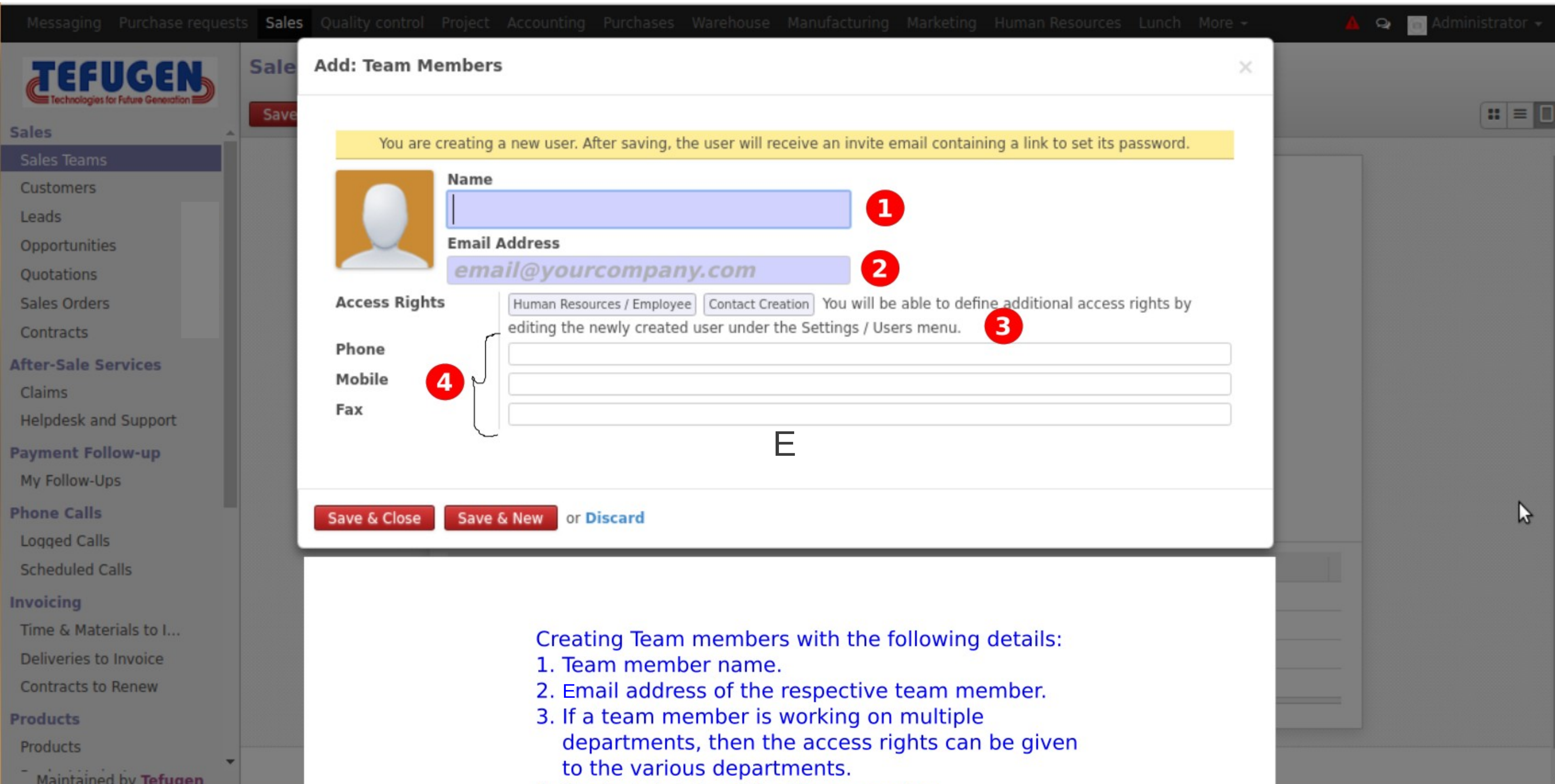
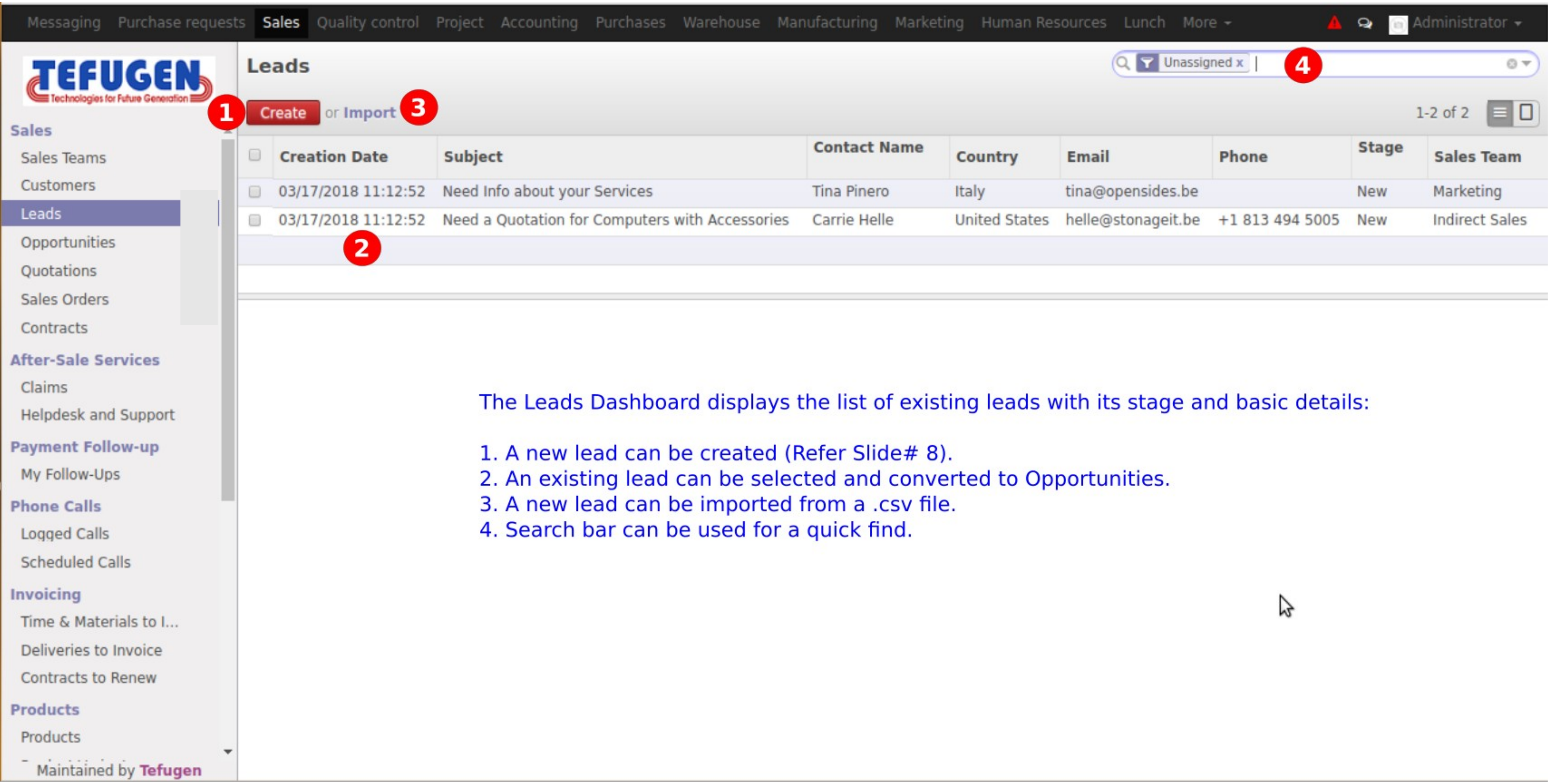
Creating Team Members



Creating Team members with the following details:

1. Team member name.
2. Email address of the respective team member.
3. If a team member is working on multiple departments, then the access rights can be given to the various departments.
4. Contact details of the Team member.

Leads - Dashboards



The Leads Dashboard displays the list of existing leads with its stage and basic details:

1. A new lead can be created (Refer Slide# 8).
2. An existing lead can be selected and converted to Opportunities.
3. A new lead can be imported from a .csv file.
4. Search bar can be used for a quick find.

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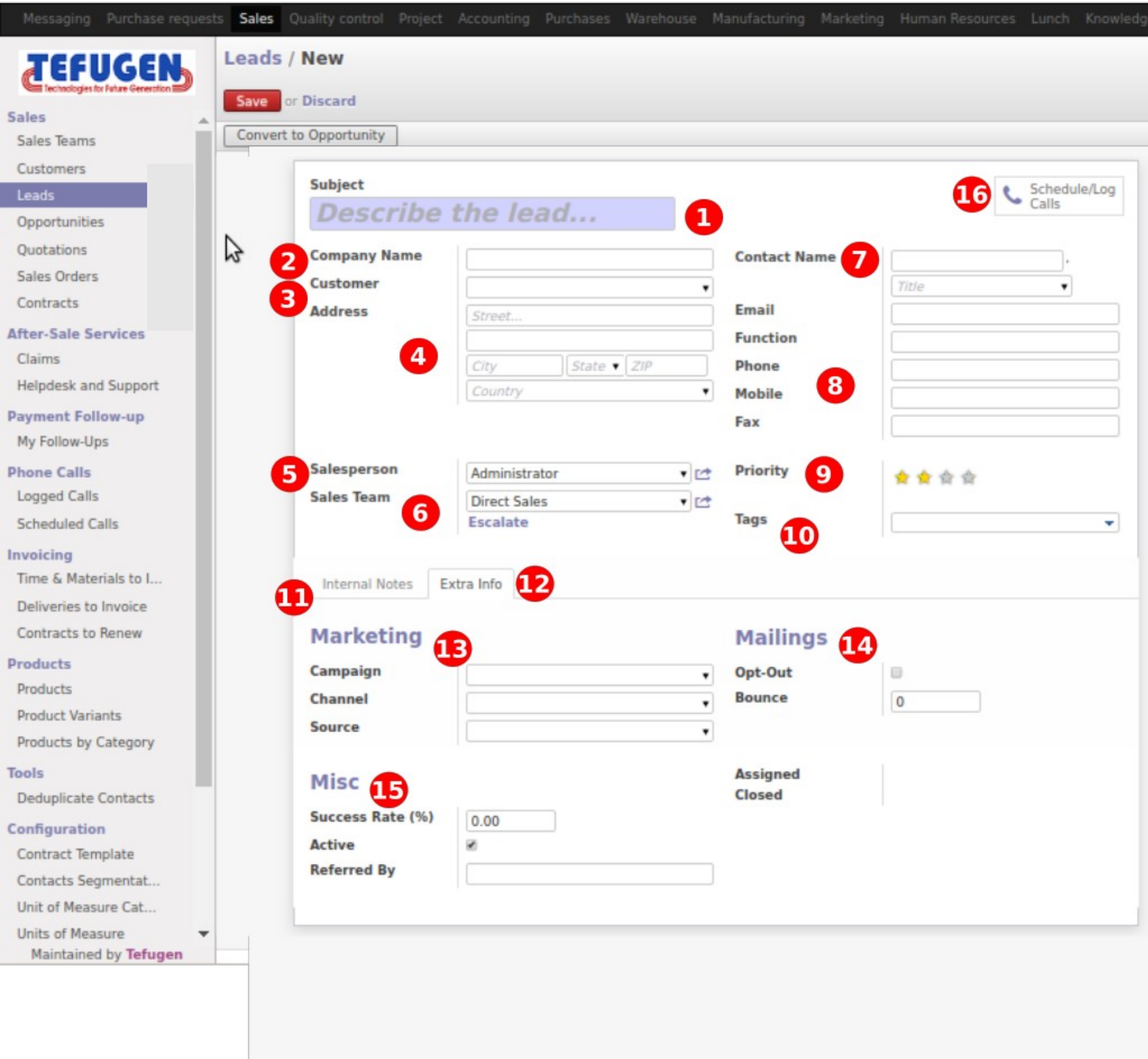
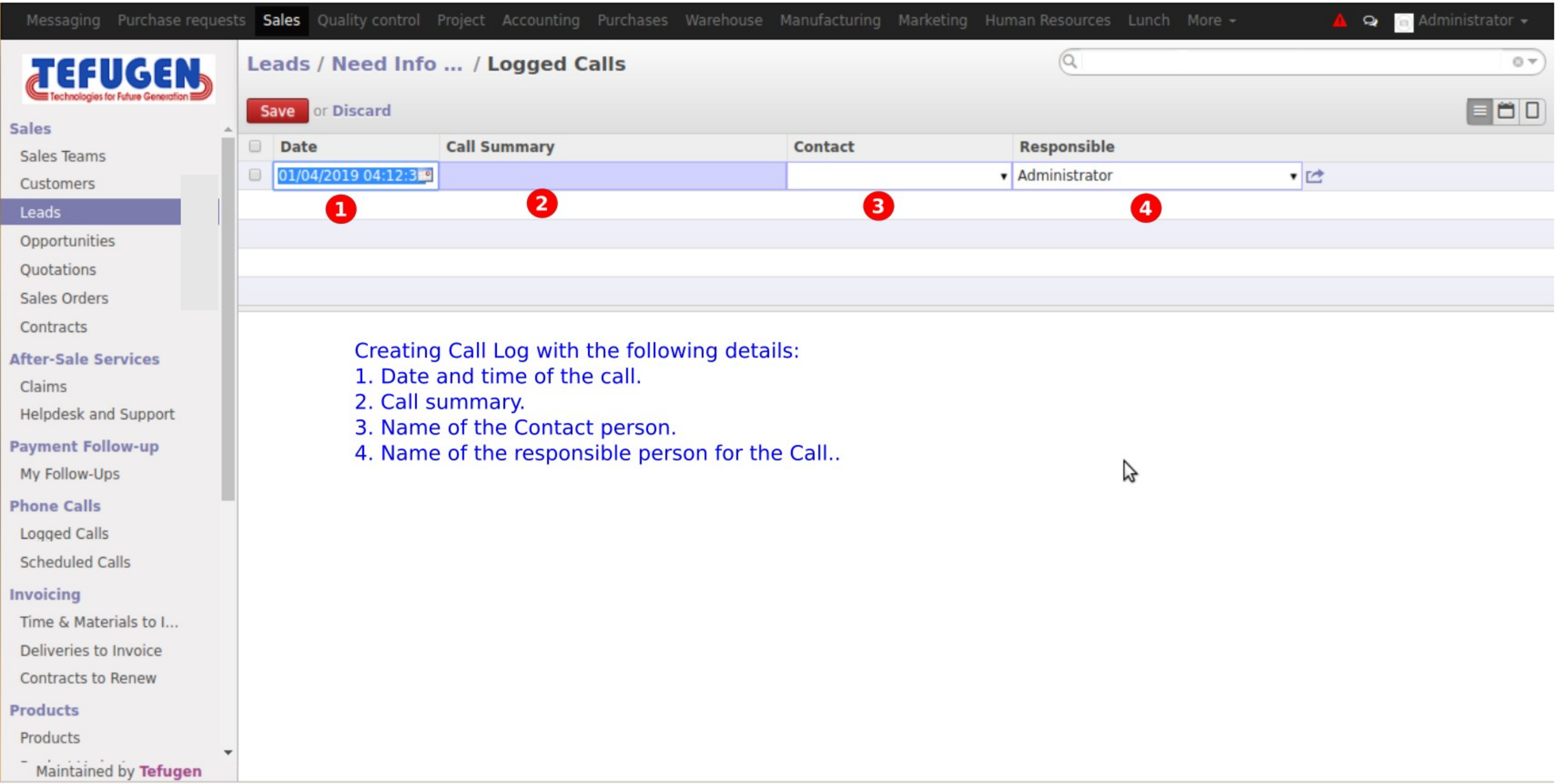
Creating Leads



Creating Leads with the following details:

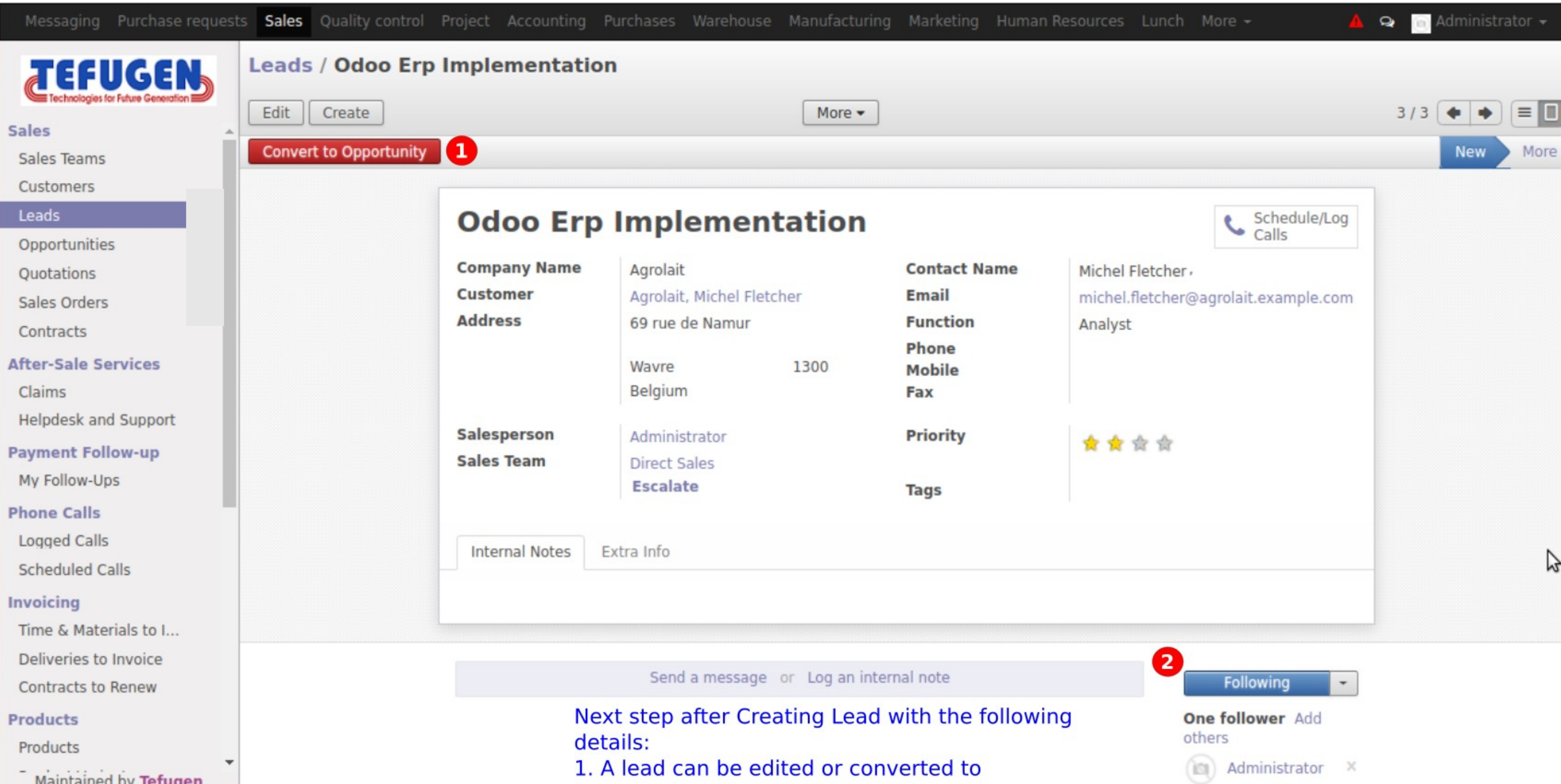
1. Lead description.
2. Name of the Company.
3. Name of the Customer (either it can be selected from the existing list or can be created for new customers).
4. Address details of the Customers.
5. Sales Person who deals with the lead.
6. Sales team name of the respective sales person.
7. Name of the Contact Person and title.
8. Basic contact details of the Contact Person (Mobile, email, Fax, Phone, Role he plays,etc.)
9. A creating lead can be set priority (low, normal, high and very high) with "star" indication.
10. Tags can be specified as a hint of the product / service.
11. Internal notes can be mentioned.
12. Extra info consists of 3 main categories related to the lead: Marketing, Mailing, Misc.
13. Marketing tab consists of the Marketing person and related details.
14. Mailing tab consists of the email base setting details like opt-out.
15. Misc tab consists of the success rate(%), active state or not, reference details, status of the lead.
16. Calls can be scheduled and logged calls list can be viewed (Refer Slide# 10).

Call / Meeting Scheduling



Creating Call Log with the following details:
1. Date and time of the call.
2. Call summary.
3. Name of the Contact person.
4. Name of the responsible person for the Call..

Created Lead



Next step after Creating Lead with the following details:

1. A lead can be edited or converted to Opportunity.
2. Followers of the lead can be added and the updates will be sent to all the followers.

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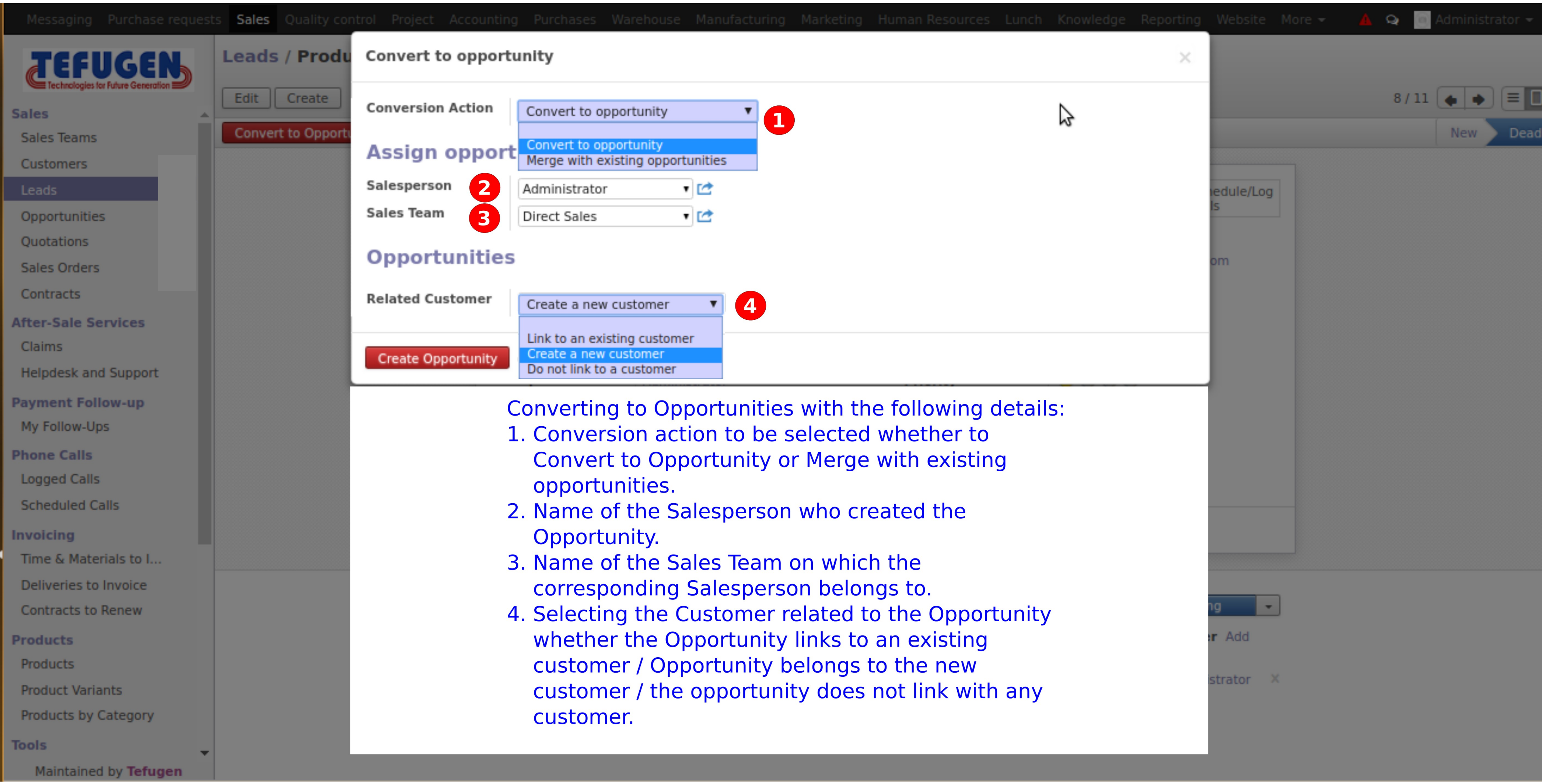
Converting to Opportunity



Converting to Opportunities with the following details:

1. Conversion action to be selected whether to Convert to Opportunity or Merge with existing opportunities.
2. Name of the Salesperson who created the Opportunity.
3. Name of the Sales Team on which the corresponding Salesperson belongs to.
4. Selecting the Customer related to the Opportunity whether the Opportunity links to an existing customer / Opportunity belongs to the new customer / the opportunity does not link with any customer.

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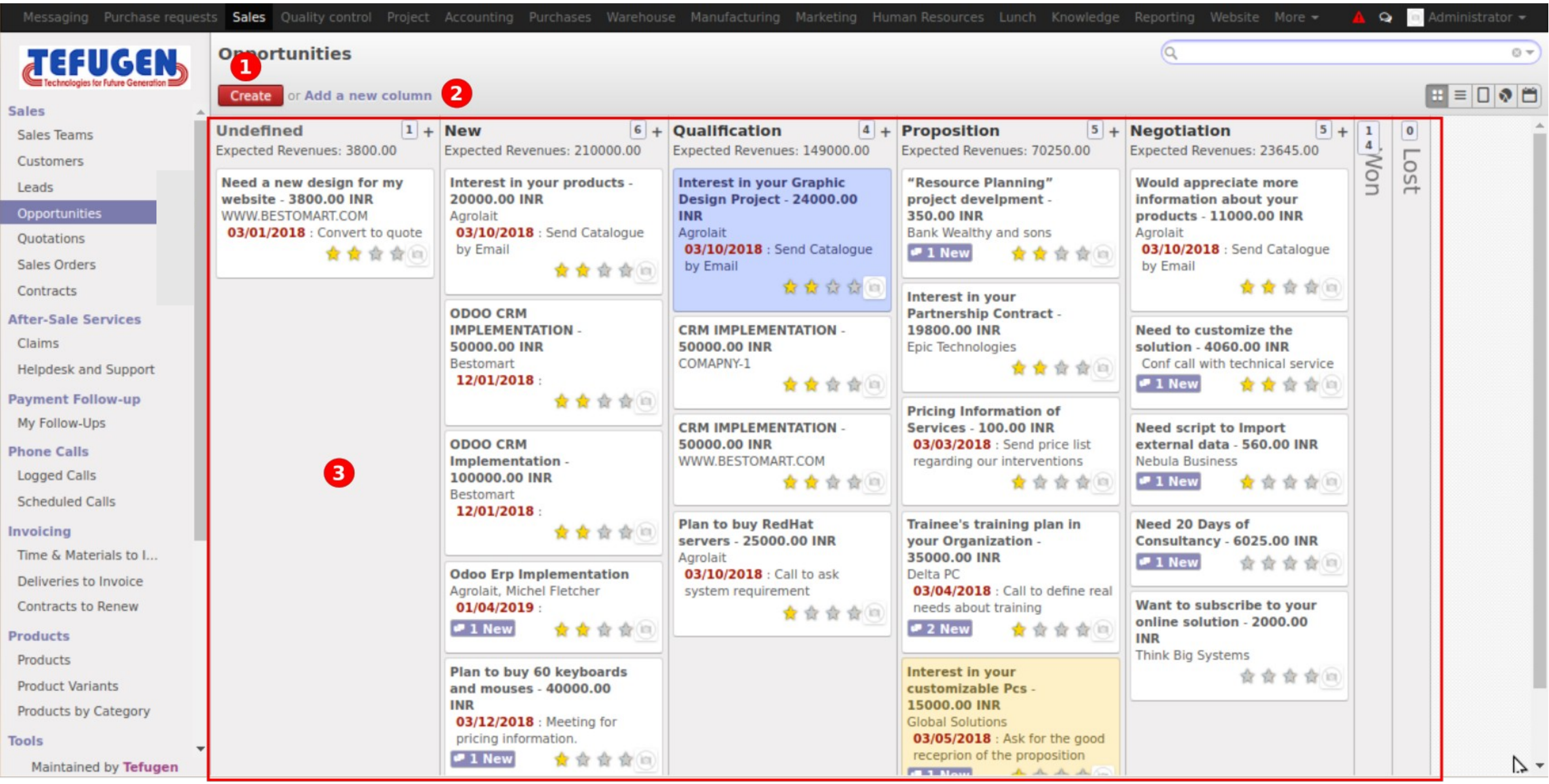
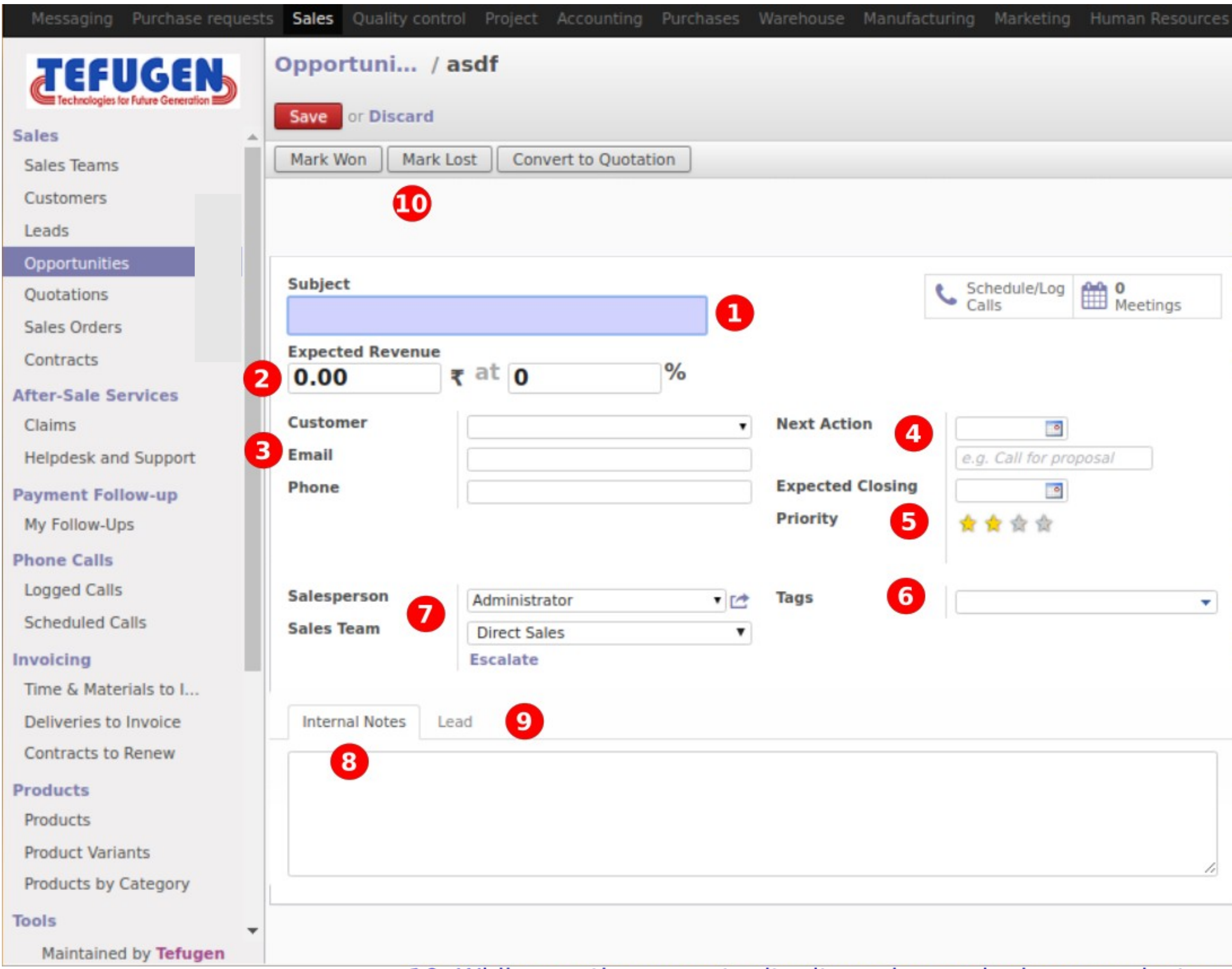
Opportunities - Dashboard



Opportunity Dashboard contains the following details:

1. A new Opportunity can be created.
2. A new Marketing campaign phase can be added.
3. The Kanban view of the existing phase with its respective Opportunity details

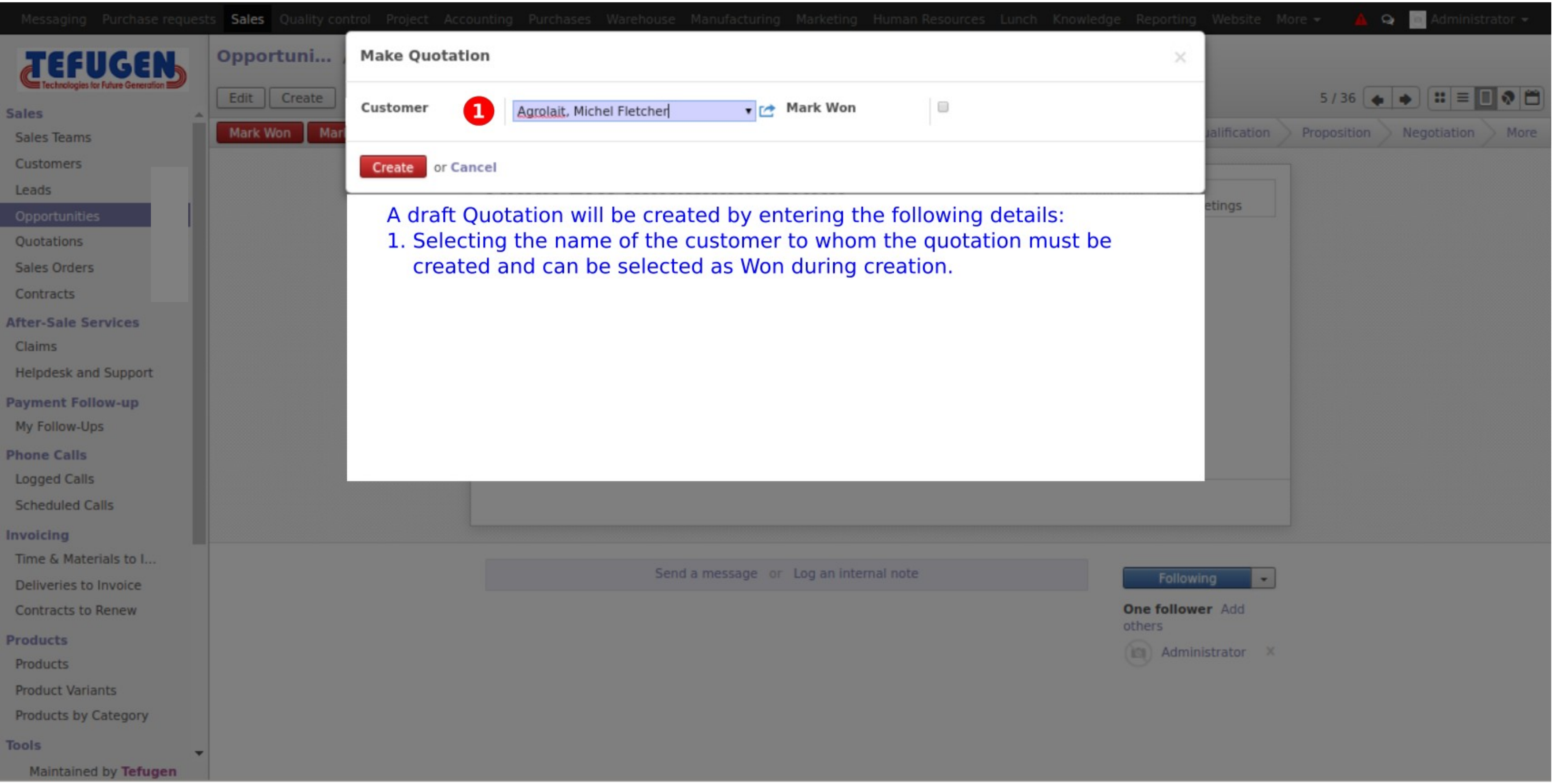
Creating Opportunity



Creating Opportunities with the following details:

1. Opportunity description.
2. Expected Revenue and Percentage will be calculated based on the phases (as mentioned in #11).
3. Name of the Customer (either it can be selected from the existing list or can be created for new customers) and his contact details.
4. Due date for the next follow-up/action can be set.
5. Expected closing date can be set.
6. Tags can be specified as a hint of the product / service.
7. Sales team name of the respective sales person.
8. Internal notes can be mentioned.
9. Lead tab consists of 3 main categories related to the lead: Marketing, Mailing, Misc.
   Name of the Customer and the basic details of the Contact Person.
   Marketing tab consists of Campaign, Channel and resource (can be selected or newly created).
   Mailing tab consists of the email base setting details like opt-out.
   Misc tab consists of active state or not, reference details, status of the Opportunities
10. While creating opportunity, it can be marked as won, lost or convert to quotation.
11. The mentioned Phases in the Opportunity dashboard, will be visible and the opportunity can be moved directly to the required phase while creation.

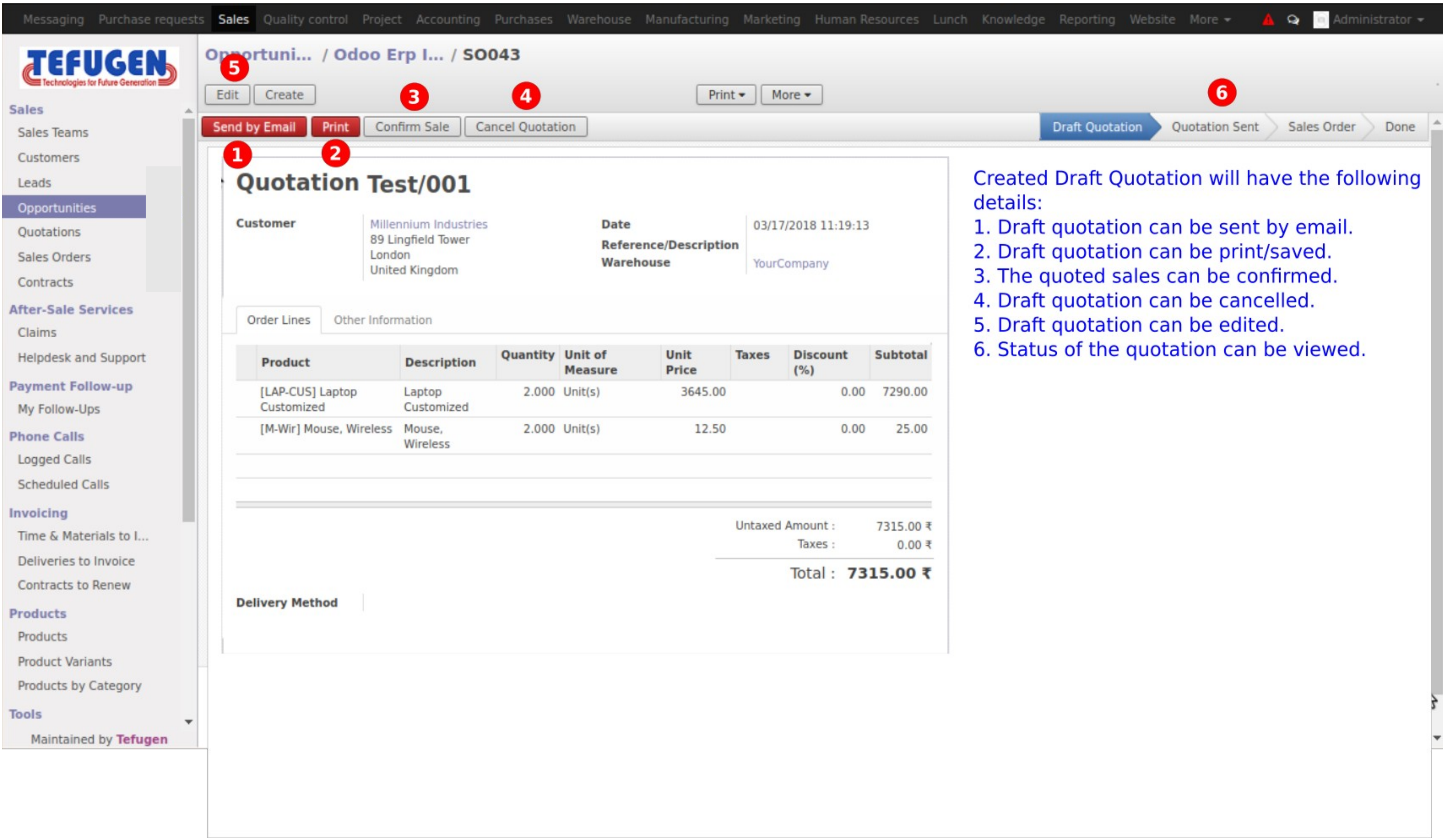
Converting to Quotation



A draft Quotation will be created by entering the following details:

1. Selecting the name of the customer to whom the quotation must be created and can be selected as Won during creation.

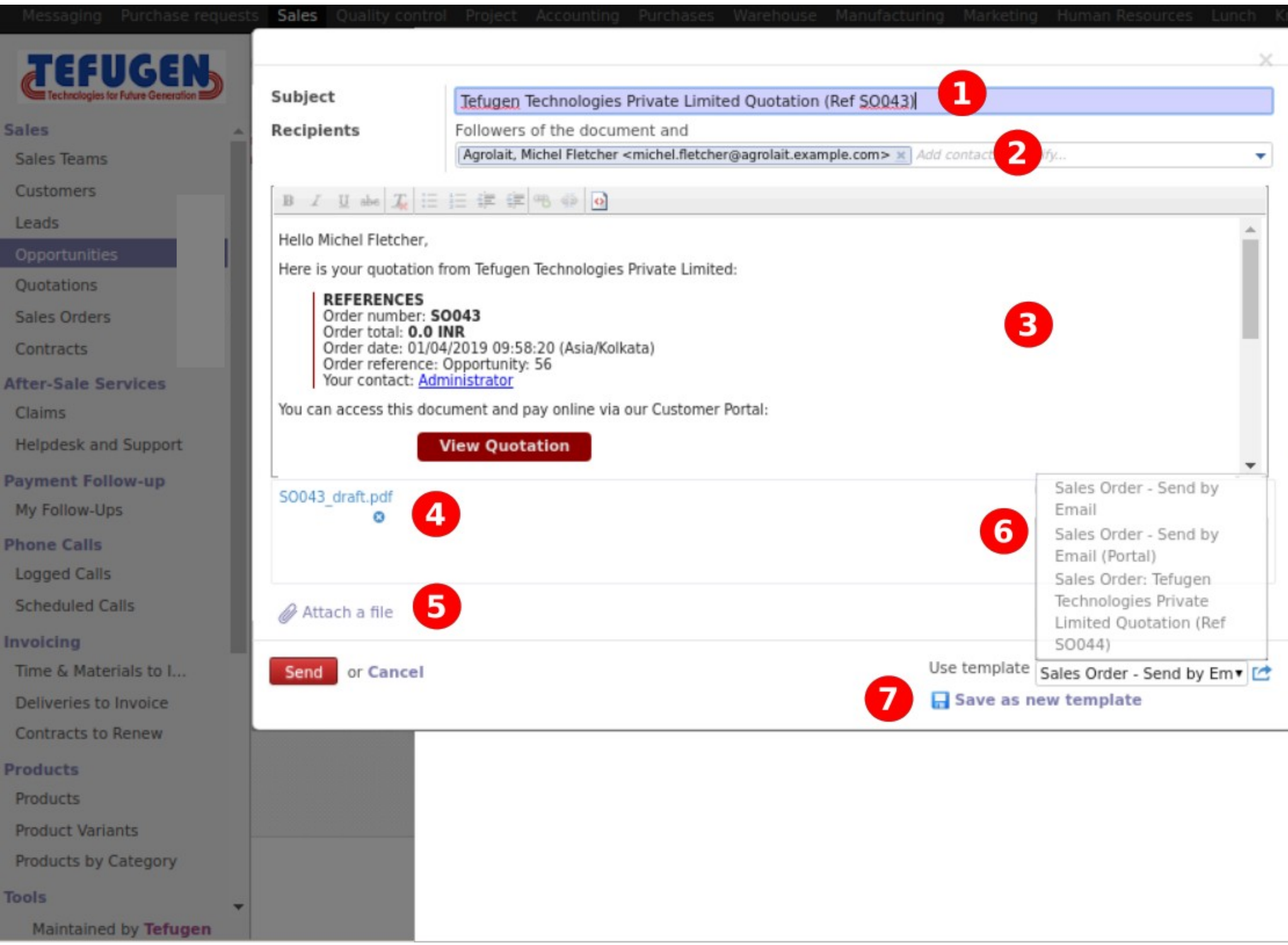
Converted Quotation



Created Draft Quotation will have the following details:

1. Draft quotation can be sent by email.
2. Draft quotation can be print/saved.
3. The quoted sales can be confirmed.
4. Draft quotation can be cancelled.
5. Draft quotation can be edited.
6. Status of the quotation can be viewed.

Sending Email

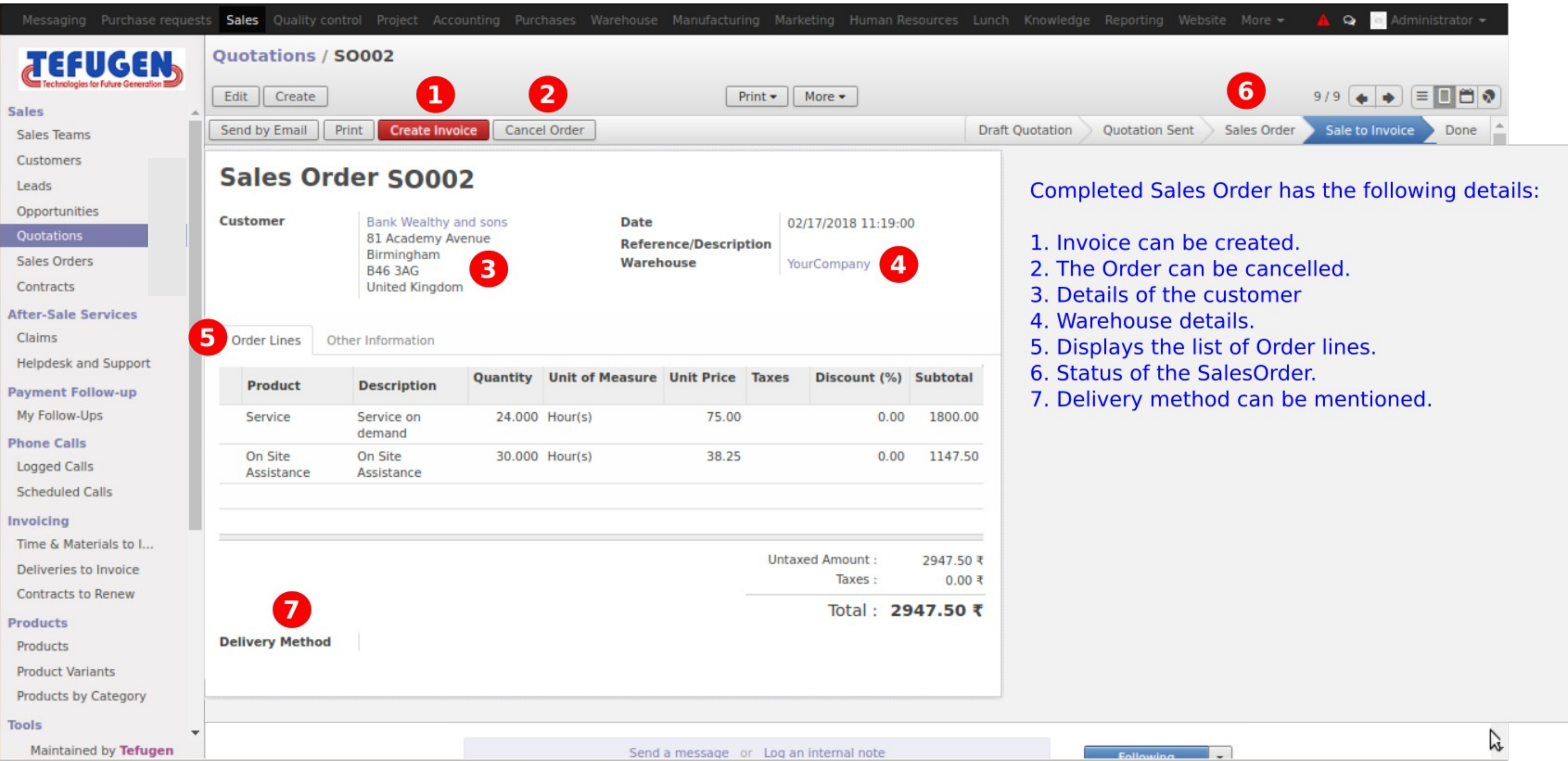


Sending Email template has the following details:

1. Subject of the Email.
2. Recipients of to whom the Email template is to be sent.
3.Body of the email content.
4. Attached Draft Sales Order Quotation.
5. Additional attachements can also be made.
6. Templates can be selected.
7. New template can also be created.

Note: All the above options in Sending Email can be easily customized or newly added based on the Customer requirements.

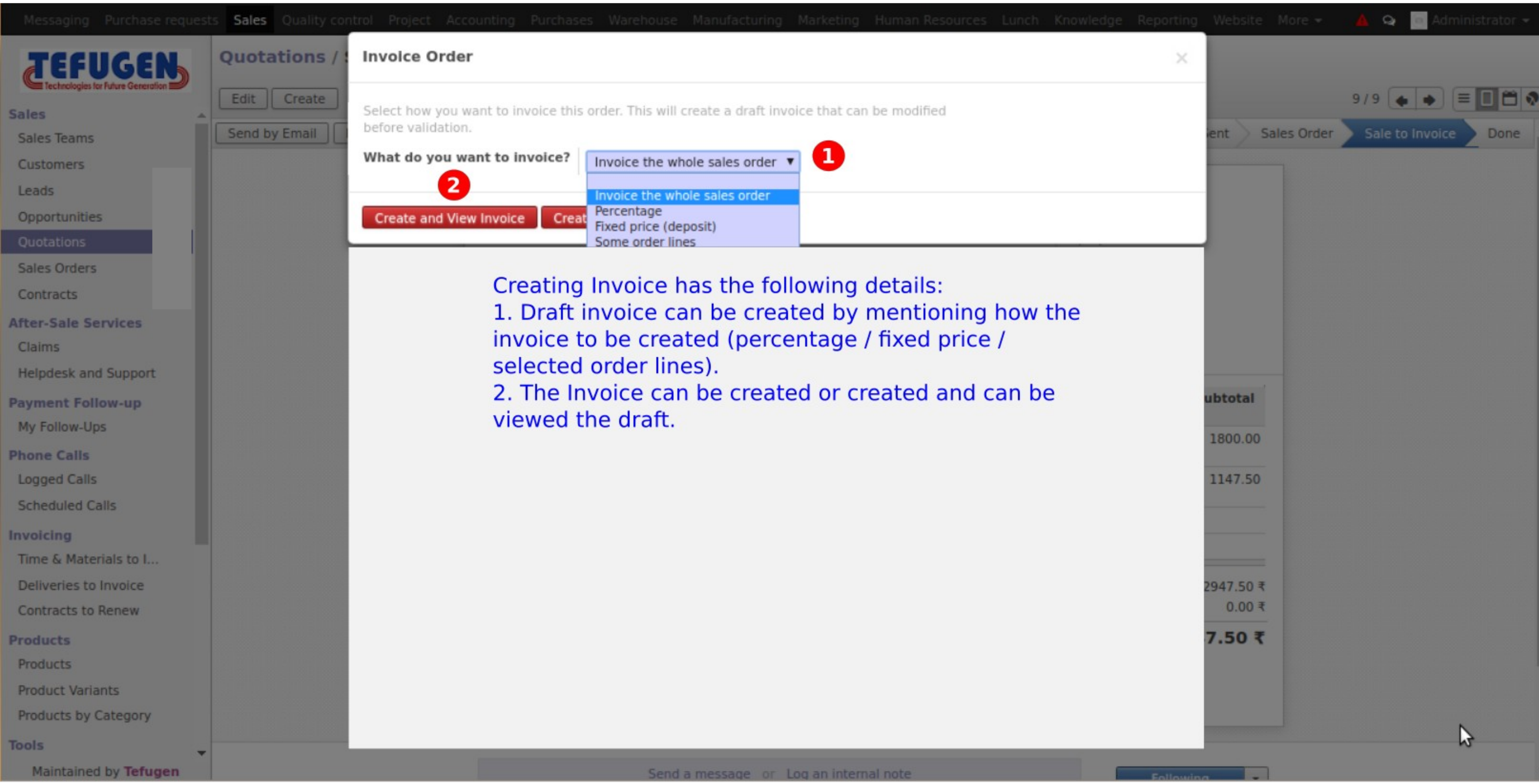
Confirming Sales



Completed Sales Order has the following details:

1. Invoice can be created.
2. The Order can be cancelled.
3. Details of the customer
4. Warehouse details.
5. Displays the list of Order lines.
6. Status of the SalesOrder.
7. Delivery method can be mentioned.

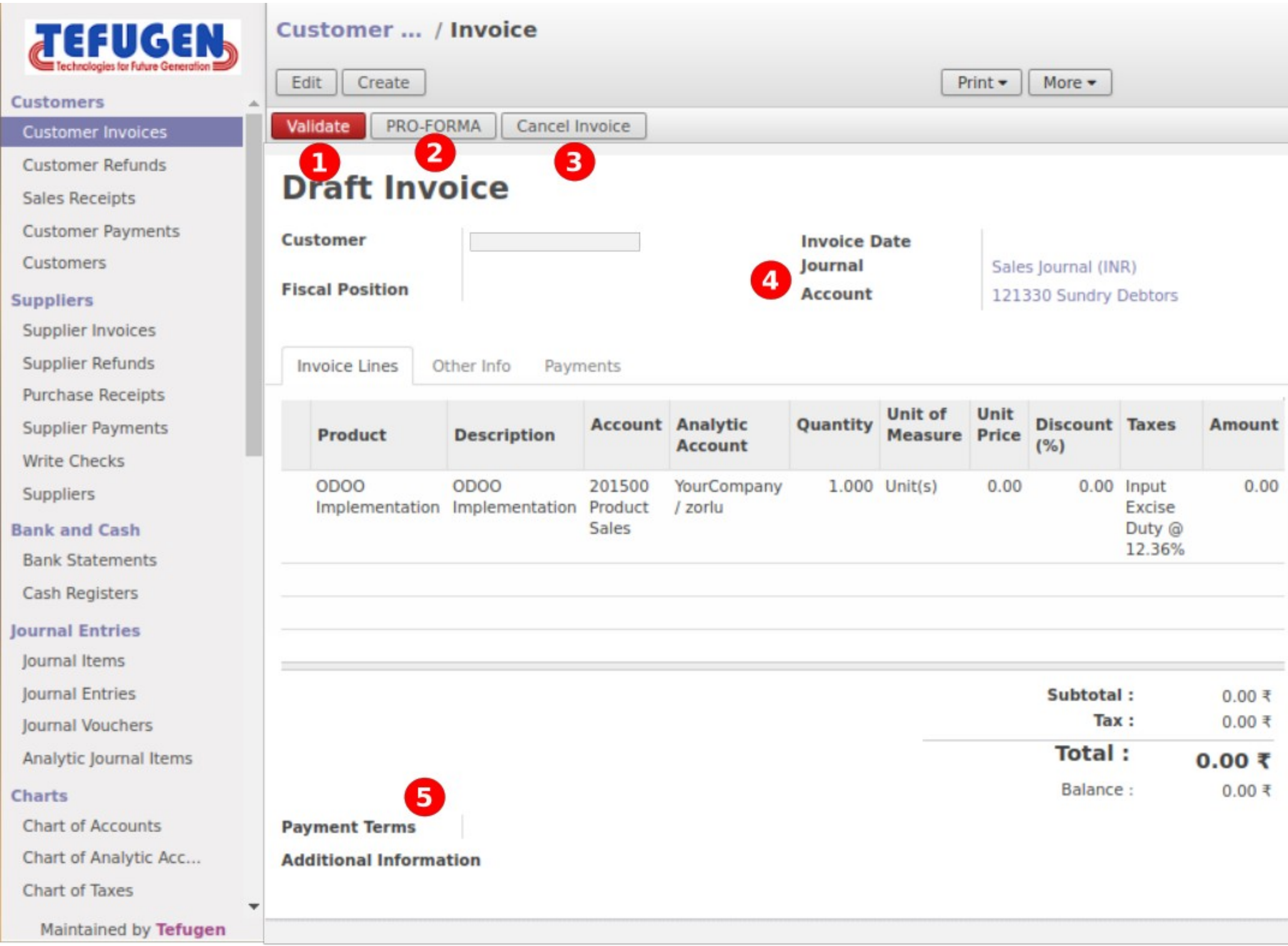
Creating Invoice



Creating Invoice has the following details:

1. Draft invoice can be created by mentioning how the invoice to be created (percentage / fixed price / selected order lines).
2. The Invoice can be created or created and can be viewed the draft.

Draft Invoice



Draft Invoice contains the following details:

1. The Draft Invoice can be validated.

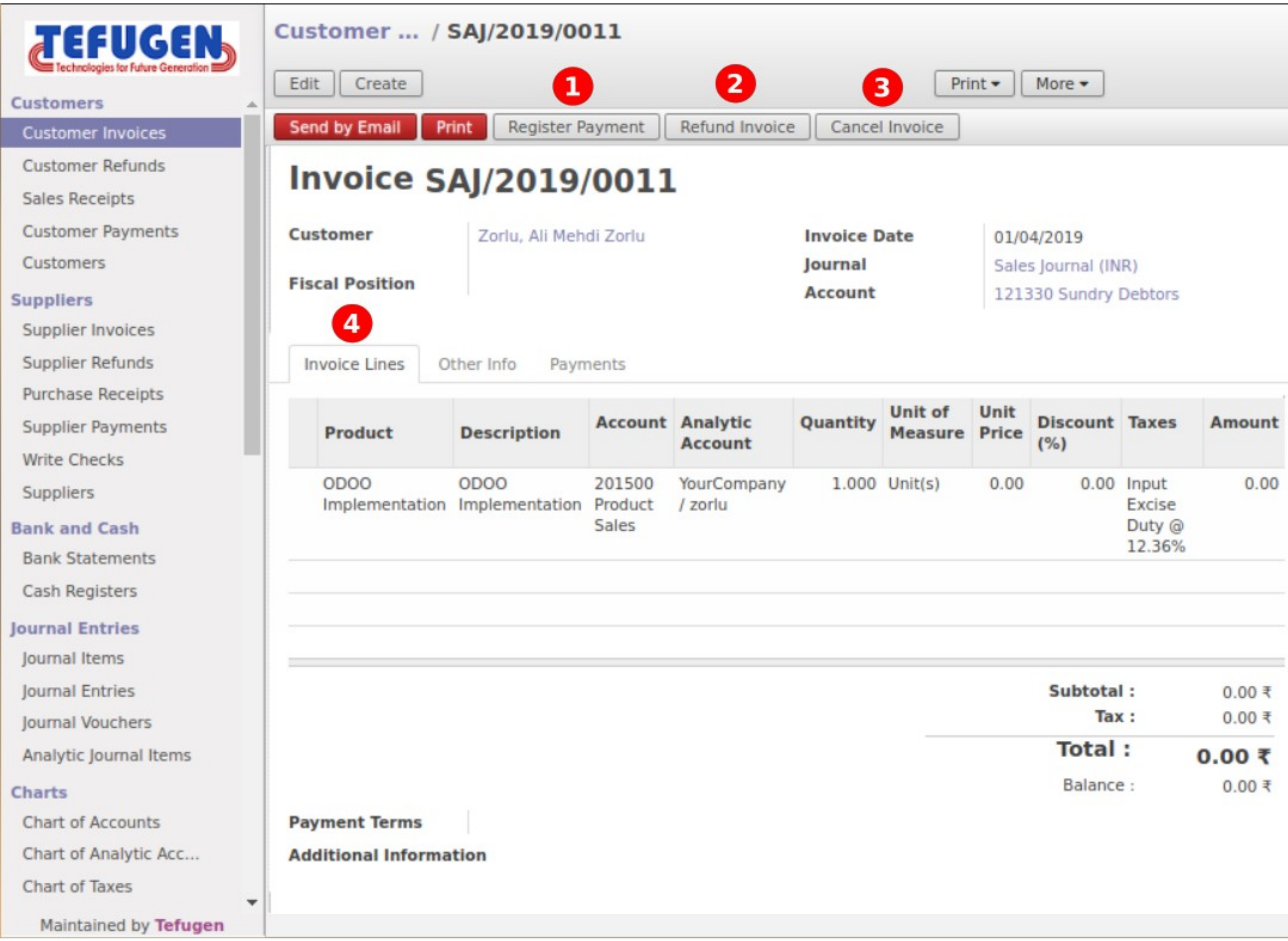
2. The Pro-forma Invoice can be generated.

3. The Draft Invoice can be cancelled.

4. Journal and the Account details will be mentioned in the Draft Invoice.

5. Payment terms can be mentioned.

Validating Invoice



After Validation of the draft Invoice, it converts to Open stage and contains the following details:

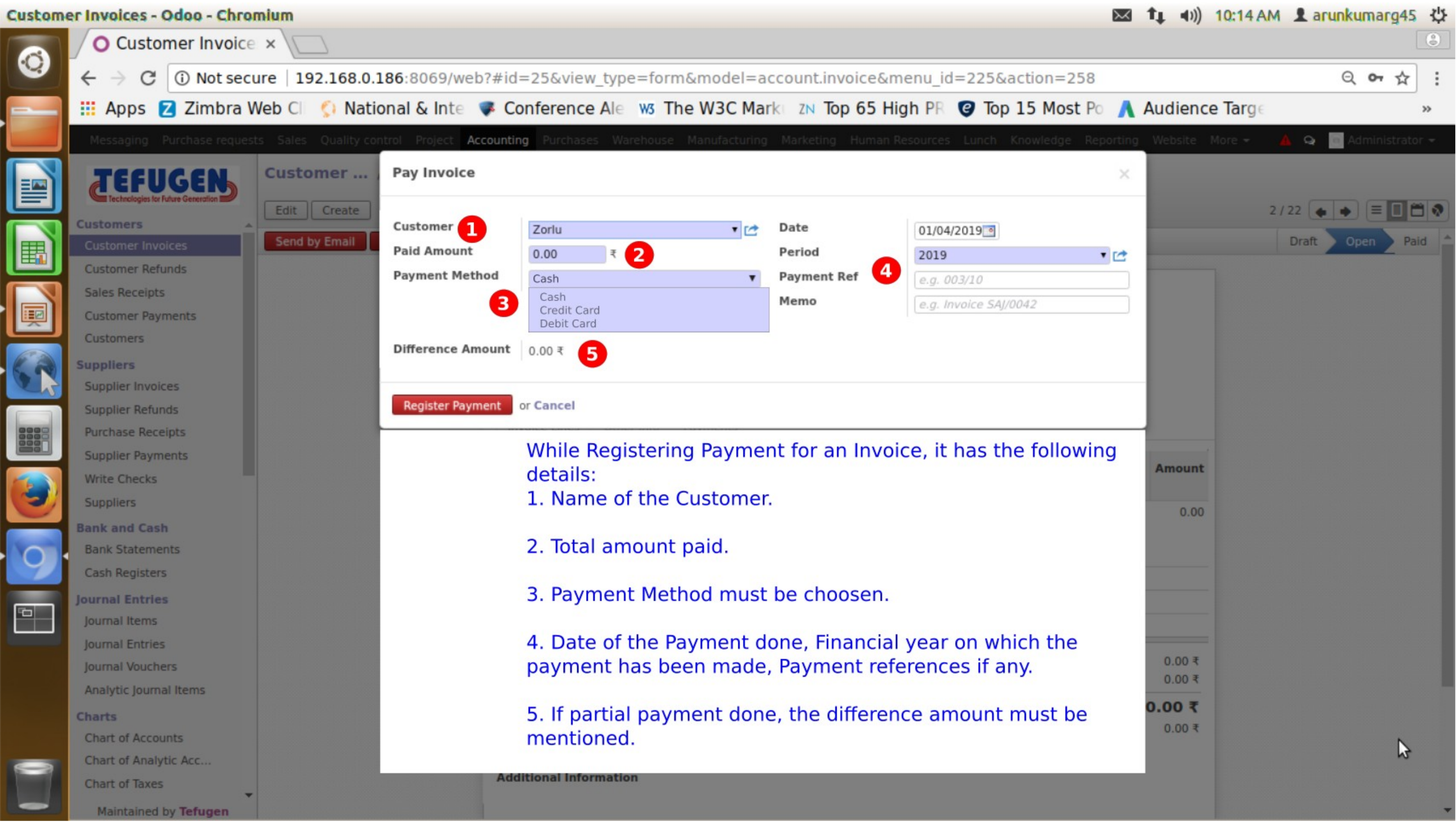
1.Payment can be registered for the Opened Invoice.

2. If, the Payment has been already made the Invoice can be refunded.

3. The Invoice can be cancelled in the Open Stage.

4. Displays the list of Invoice Lines.

Payment and Refund - Payment Registration



While Registering Payment for an Invoice, it has the following details:

1. Name of the Customer.

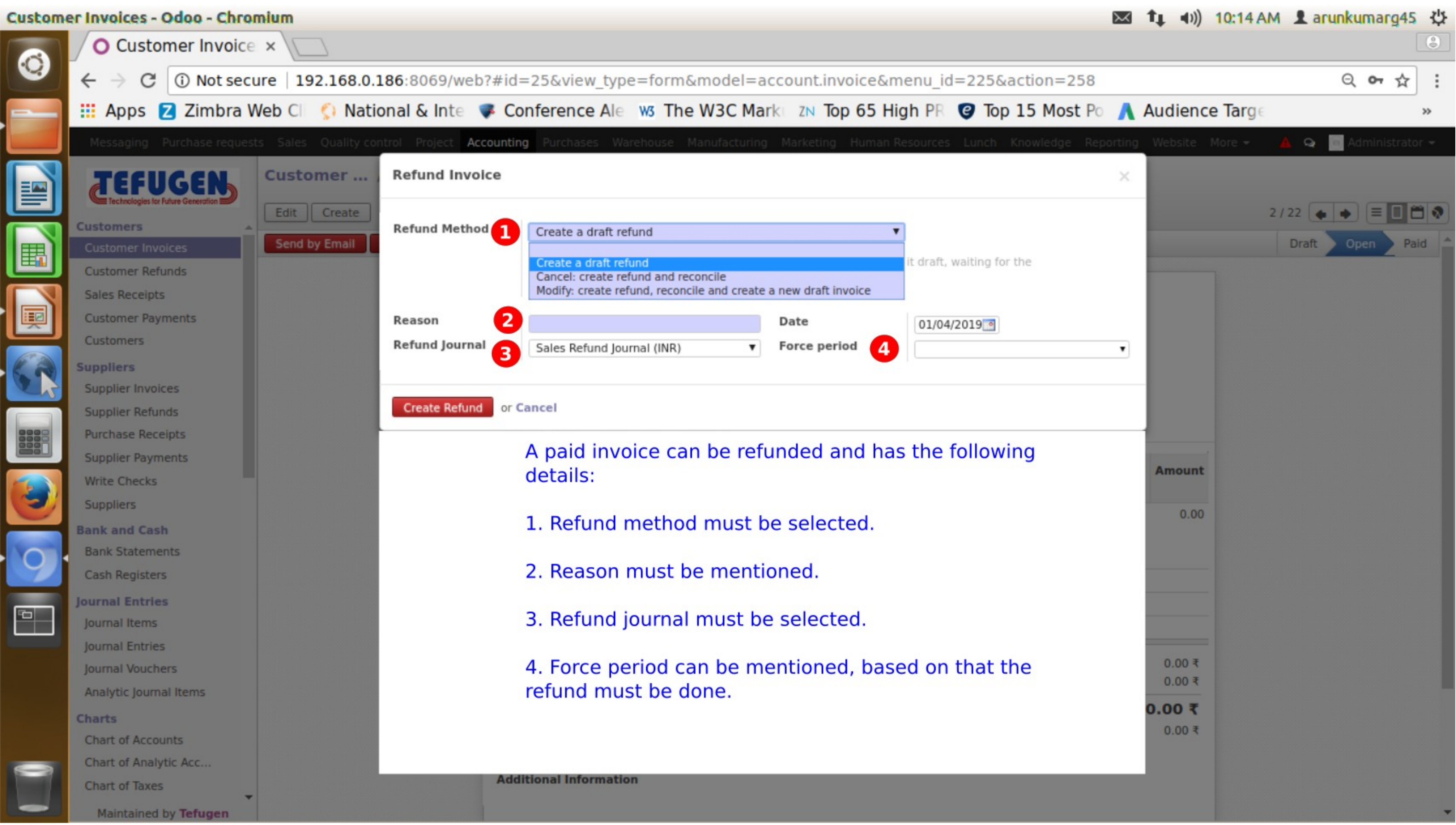
2. Total amount paid.

3. Payment Method must be choosen.

4. Date of the Payment done, Financial year on which the payment has been made, Payment references if any.

5. If partial payment done, the difference amount must be mentioned.

(contd.,) - Refund



A paid invoice can be refunded and has the following details:

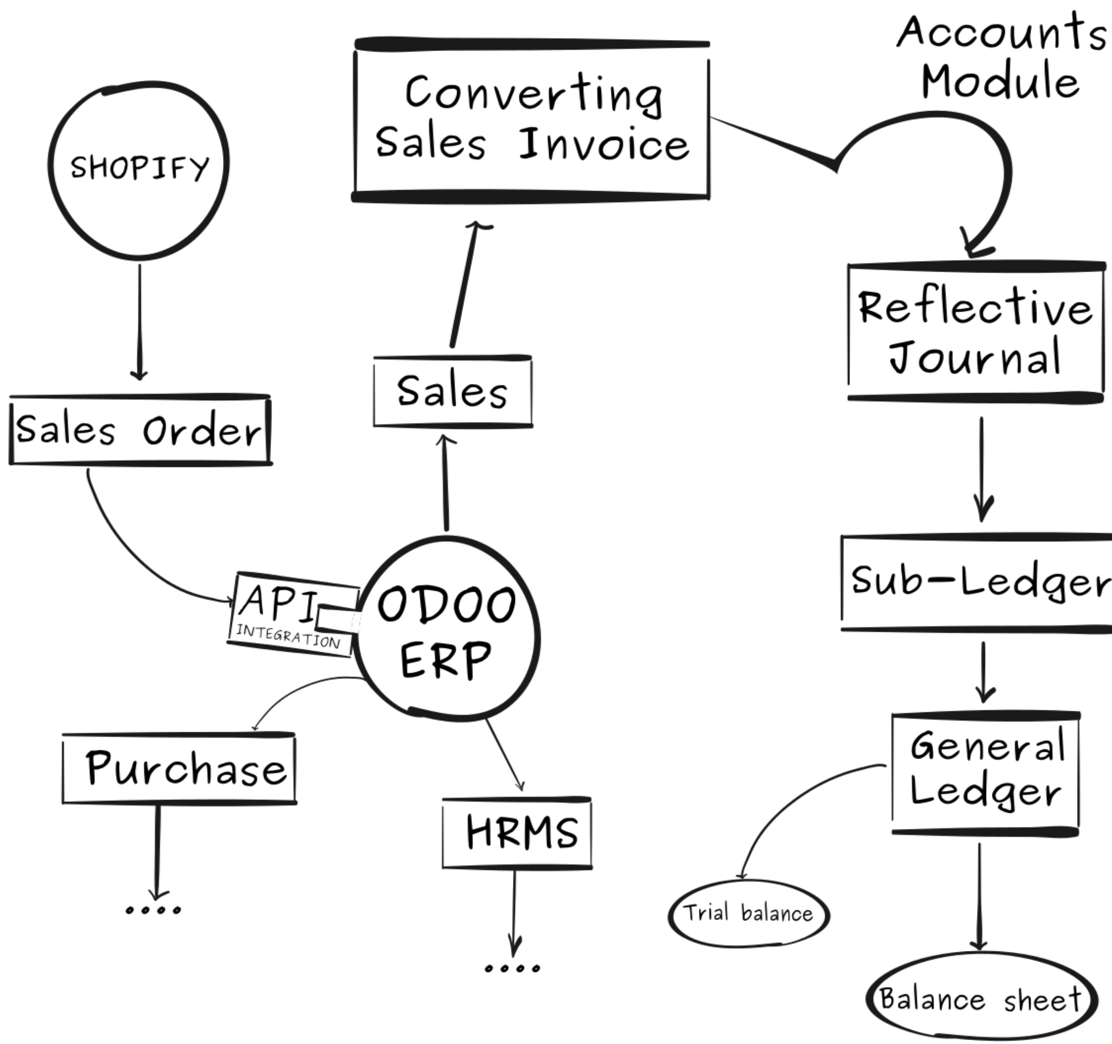
1. Refund method must be selected.

2. Reason must be mentioned.

3. Refund journal must be selected.

4. Force period can be mentioned, based on that the refund must be done.

API Integration made Easy



(and all modules integration can be done).

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Customers (Partial List)

- GULF INFRA TECH — Delivering the Future
- BESTOMART .com
- Sunartral Electric Private Limited
- GEECO
- ZORLU.
- TATA
- TATA POWER
- RELIANCE

Thank you

Our Business Knowledge, Your Winning Edge.

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