

EXPERIENCE THE PROFICIENCY OF ODOO IN SERVICE INDUSTRY

One of the Canadian companies who suited their business using a high graded ERP system which was cost inefficient and inflexible to meet their requirements. They were in search of an ERP system which is cost efficient and can enhance their business. In order to render the quality IT services for small businesses, Odoo was their only choice which was readily available in the open market. But when it comes to implementation and customization of Odoo ERP, it has to be managed by respective professionals.

As we, PPTS solutions have huge hands of experience in the fields of Odoo implementation, customization, and migration; we rendered our service in overcoming their inconvenience in handling their scalability in ERP systems.

OBSTACLES FACED

The following are the pain points experienced by our client.

- Difficulty in accessing to the profit details for each product added in the sale order line.
- Unavailability of options to create automatic purchase order against the sale order.
- Predicament in printing the check once the payment is processed.
- Inconvenience in printing the payment receipt for each payment processed.
- Hardship in processing bulk payments for multiple bills under a single partner at once.
- Unavailability of amending option to change the orders that are confirmed.
- Difficulty in reconciling the bank accounts and statements automatically.

SOLUTIONS PROVIDED

In order to overcome the above-mentioned obstacles, we devised the following solutions.

- Calculation of the profit percentage using the purchase price and mark up the price of each product.
- Implemented a solution which raises a purchase order against the respective sale order along with the reference link.
- Designing of their check-in Odoo which can be printed on a single click.
- Customizing a new report to print the payment receipt for each payment. Bulk payment receipts can also be printed.
- The payment process for multiple bills at once by selecting the respective bills. The bills which have the same partner can be paid using a single window.
- Development of a new module through which the user can amend the required changes in the sales and purchase even after it is confirmed. The entire amendment history is being tracked for future reference.
- Provision of a solution to reconcile the bank accounts and statements automatically and verify them with their bank statements.

TASKS EXECUTED

- Odoo version 9 implementation executed within 5 months duration.

- Overall customization was completed in 25 days by deputing 1 resource.
- Support and maintenance were provided for more than a year.

KEY ELEMENTS OF SUCCESSFUL PARTNERSHIP

- Provision of cost-effective and efficient ERP system to fit all the business operations.
- Quick implementation and switch over to the new ERP system.
- PPTS onsite visit to Canada for user training and support.
- Regular customer interaction with the project team on a weekly basis.