

How to use Odoo in a service company (recurring and one-shot services)

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SUMMARY

- 1 Introduction
- 2 Using Odoo to provide Office solutions
- 3 Odoo Apps & setup required
- 4 How it works within Odoo ?
- 5 Conclusion

Using Odoo to provide Office solutions
...through a simple Sales & Invoicing process

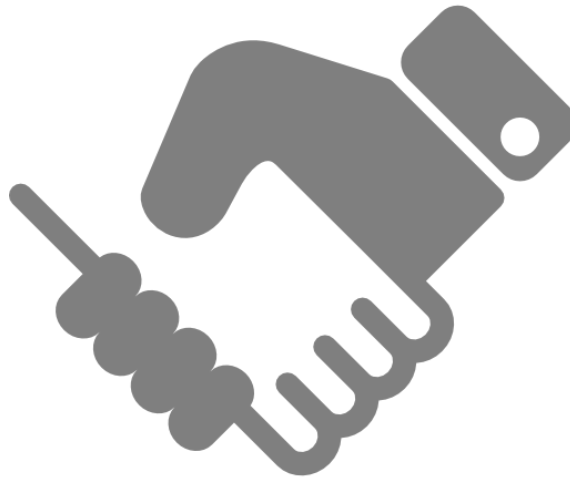
INITIATE THE RELATIONSHIP

Step 1

Step 2

Step 3

Negotiate the terms
of the **agreement**
with the client and
confirm them.
→ The recurrence



MANAGE THE DAY-TO-DAY SALES

Step 1

Step 2

Step 3



Register the
punctual services
provided to each
client throughout
the month, quarter,
semester, year.
→ The one-shots



INVOICE PERIODICALLY & EASILY

Step 1

Step 2

Step 3



Invoice all the services provided to the customer.

→ The recurrence and the one-shot services

Odoo Apps & setup required

Install two apps and tick one box !

Odoo Apps & setup required

Install CRM
App

- o Modules → CRM



Install Sales
App

- o Modules → Sales Management



Activate
“Contract
Management”

- o Sales → Configuration → Settings

How it works within
Odoo ? (Demo)

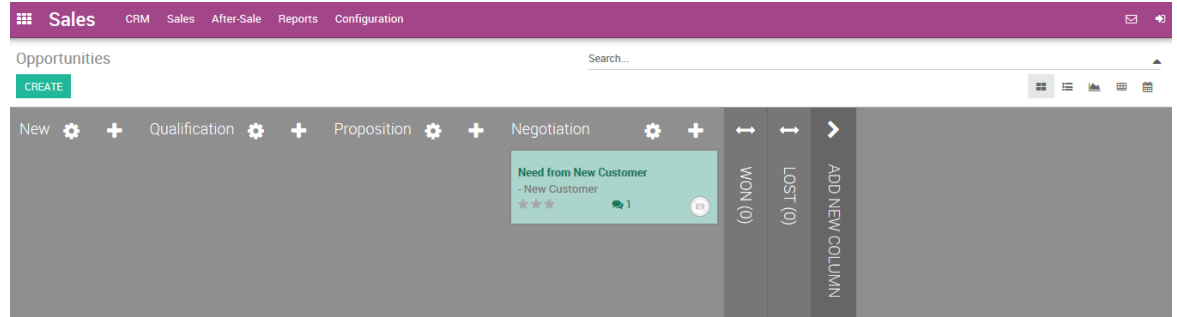


INITIATE THE RELATIONSHIP

Step 1

Negotiate the terms of the **agreement** with the client and confirm them.

→ The recurrence



Sales Order S0002

Customer: [New Customer](#)

Contract / Analytic: [Contract : Two offices](#)

Contract Status: [In Progress](#)

Date: 06/01/2015 11:44:55

Expiration Date: 07/01/2015

Payment Term:

Quotation Template: [Default Template](#)

ORDER LINES SUGGESTED PRODUCTS OTHER INFORMATION

Product	Description	Quantity	Unit Price	Taxes	Subtotal
Service	Service	1.000	75.00	VAT 21% - Services	



\$ Cost/Revenue 0 To invoice Invoices

Contract : Two offices

☐ Timesheets

Customer: [New Customer](#)

Account Manager: [Catherine Vieslet](#)

Template of Contract

Reference: AA002

Parent Analytic Account

Recurring Invoices

☒ Generate recurring invoices automatically

[create invoices](#)

Repeat Every: 1 Month(s)

Date of Next Invoice: 06/01/2015

Product	Description	Quantity	Unit of Measure	Unit Price	Sub Total
Service	Service	1.00	Hour(s)	75.00	75.00

Untaxed Amount :

Taxes : 15.75€

Total : 90.75€

MANAGE THE DAY-TO-DAY SALES

Step 2

Register the **punctual services** provided to each client throughout the month, quarter, semester, year.
→ The one-shots

Add one-shot services all the period long !

Recurring Invoices

☒ Generate recurring invoices automatically

⇒ create invoices

Repeat Every 1 Month(s)

Date of Next Invoice 06/01/2015

Invoice Lines

Product	Description	Quantity	Unit of Measure	Unit Price	Sub Total
Service	Service	1.00	Hour(s)	75.00	75.00



Draft Invoice

Customer New Customer

Invoice Date 06/01/2015

Payment Term

Salesperson Catherine Vieslet

INVOICE LINES OTHER INFO

Product	Description	Analytic Account	Quantity	Unit Price	Taxes	Amount
● Service	Service	Contract : Two offices	1.000	75.00 €	VAT 21% - Services	75.00 €
● Post Service	Post Service : 06/01	Contract : Two offices	1.000	10.00	VAT 21% - Services	10.00
● Post Service	Post Service : 06/12	Contract : Two offices	3.000	10.00	VAT 21% - Services	30.00
● Administration	Administration	Contract : Two offices	15.000	55.00	VAT 21% - Services	825.00

Add an item

Terms and conditions...

Untaxed Amount : 940.00€

Tax : 197.40€

Total : 1137.40€

INVOICE PERIODICALLY & EASILY

Step 3

Invoice all the services provided to the customer.
→ The recurrence and the one-shot services

Customer Invoices / INV/2015/0001 SO002

EDIT CREATE

Print More

1 / 2 < >

Invoice INV/2015/0001

Customer New Customer

Invoice Date 06/01/2015

Salesperson Catherine Vieslet

Payment Term

INVOICE LINES OTHER INFO

Product	Description	Analytic Account	Quantity	Unit Price	Taxes	Amount
Service	Service	Contract : Two offices	1.000	75.00 €	VAT 21% - Services	75.00 €
Post Service	Post Service : 06/01	Contract : Two offices	1.000	10.00 €	VAT 21% - Services	10.00 €
Post Service	Post Service : 06/12	Contract : Two offices	3.000	10.00 €	VAT 21% - Services	30.00 €
Administration	Administration	Contract : Two offices	15.000	55.00 €	VAT 21% - Services	825.00 €

Untaxed Amount : 940.00€

Tax : 197.40€

Total : 1137.40€

Amount Due : 1137.40€

Conclusion

Keep it simple and fully integrated !

Benefits

- ✓ Full **standard** configuration
- ✓ **Easy** to use, easy to share
- ✓ **Cheap**
- ✓ **Fully integrated**

Conclusion

”

Simplicity is the ultimate form of sophistication.

”

Leonardo Da Vinci

Thank You

Call to Action

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