INFORMATION MANAGEMENT

odoo

USER GUIDE

Version (16/04/2026)

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1. INTRODUCTION

Odoo is a basic tool to organize workflow and information management in XELTO. The main goal is to:

- Manage centrally all XELTO projects and tasks;
- Plan current projects and online report progress;
- Daily report a work done and a time to clear the timesheet monthly;
- Support customers and manage tickets via the Helpdesk module;
- Centralize client details and directories via the Contacts module;
- Register absence (vacation and sick leave) via the Time Off module;
- Track potential sales and manage customer relationships via the CRM module;
- Estimate tasks and projects;
- Report projects.

2. BASIC INFORMATION ON TOOL

2.1 HOW TO LOG ON:

Each new user receives an email invitation to the system. When you accept an invitation, enter your own password with your e-mail as a user name.

Log in link: *https://xelto.odoo.com/pl/web/login*

2.2 KEY CONCEPTS

These are the key Odoo concepts you will work with via the main dashboard Apps:

- **PROJECT -** groups tasks for customer or internal projects. A project can be external open which means that the tasks are enduring or it can be external close, which means with a specific due date. The last category is an internal for XELTO internal activities.
- **TASKS -** are reported activities assigned to a specific person within a Project. Tasks have a deadline and initially planned hours set. A special kind of task is an open one with no due date which is unplanned and can be run by several different consultants.
- **TIMESHEET -** a record of time that was used to accomplish different tasks. Timesheets must be accepted by the designated supervisor/manager. Timesheet validation is done periodically.
- **HELPDESK -** module used for centrally managing support tickets from external customers and internal employees.
- **CONTACTS -** central address book for XELTO, storing details of all clients, prospects, and vendors.
- **TIME OFF -** module used to register your absences, vacations, and sick leaves.

- **CRM -** module used for tracking potential sales, managing interactions with prospects, and forecasting revenue.
- **CHATTER / FOLLOWERS -** Odoo's communication system at the bottom/right of every record (task, project). Followers receive notifications about task progress or messages.

3. PROJECTS

There can be several open/active projects for a single customer. Two or three first characters of the project name reflect common customer name, for instance **[AME-001] – Wsparcie Oracle JD Edwards.** (AME – shortcut for customer name – AmeriGas Polska).

Each of the project has parameters set to define project type, rules, budget and time fence. An entity responsible for project creation and maintenance as well as resources assignment is only XELTO administration.
Each Odoo user has an access only to projects he/she is invited/assigned to.

When you open the Projects app, you can view all available projects using different layouts. The default is usually the Kanban view, which displays projects as cards, but you can also switch to the List view for a more compact, table-like summary of all your projects.

3.1 WORKING WITH PROJECTS

Each of the project is linked to a specific customer. In the Project Description or internal notes, some key project information are stated, for instance communication language. You can upload project documentation directly to the Documents app or as attachments in the Project's chatter.

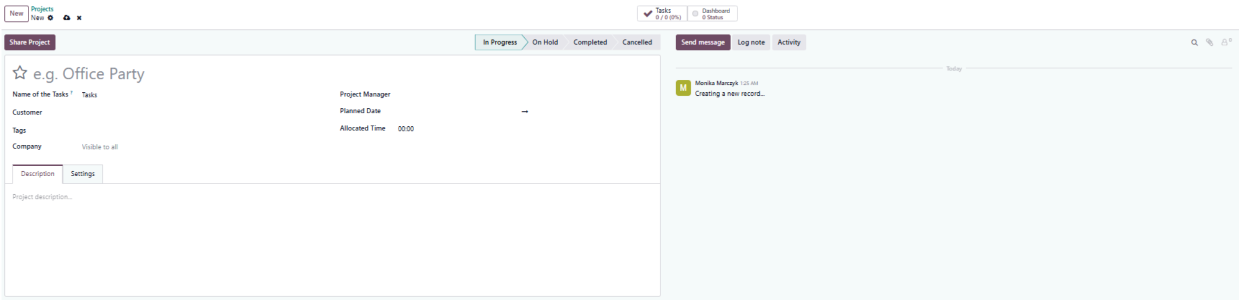
Internal projects which are not billable, begins from XEL and this is an 'internal' category.

3.2 CREATING AND CONFIGURING A PROJECT

Important Note: Creating and configuring projects is restricted to authorized personnel (Administration or designated Project Managers).

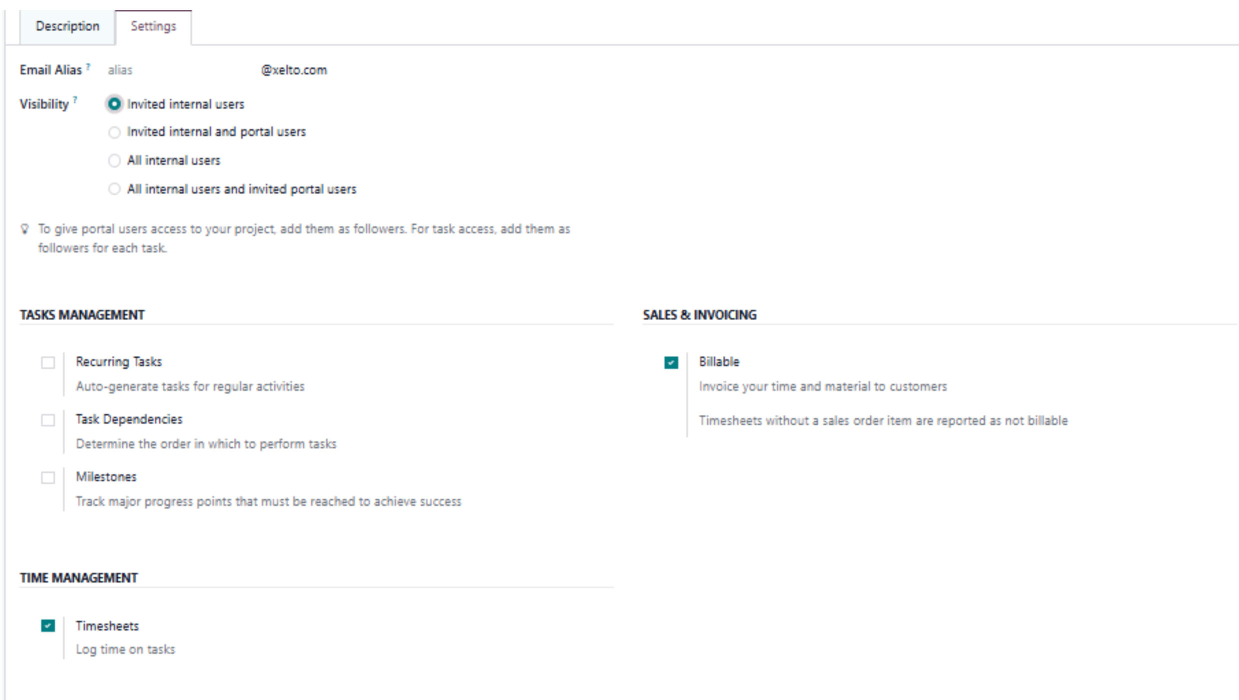
If you have the appropriate access rights, you can create a new project by clicking the New button in the Projects app. Fill in the following general fields:

- Project Name: Enter a clear name following the naming convention.
- Name of the Tasks: Define the label for tasks within this project.
- Customer: Select the client associated with the project.
- Tags: Add relevant tags for easy filtering.
- Project Manager: Assign the person responsible for the project.
- Planned Date & Allocated Time: Set the overall timeframe and estimated hours.



Under the Settings tab, you must configure the project's rules:

- Visibility: Determine who has access. Selecting "Invited internal users" ensures that only employees added as followers to the project or its tasks can see it.
- Tasks Management: Enable advanced tracking features if needed, such as Milestones, Task Dependencies, or Recurring Tasks.
- Time Management: Ensure the "Timesheets" checkbox is enabled so consultants can log their work time.
- Sales & Invoicing: Check the "Billable" box if the logged time and materials are to be invoiced to the customer.



Project Statuses (Stages): At the top right corner of the project record, you will find the project's lifecycle stages.
You should update the project status by clicking on the appropriate stage:
In Progress, On Hold, Completed, or Cancelled.

4. TASKS

Activities to be done are registered in the Odoo system under the **Project App > Tasks**. Tasks are created to:

- Plan (work plan, resources plan, due dates setting, documentation completion, estimation etc.)
- Report (customer tasks accomplishment post factum reporting, when the task differs from the one originally reported or has its own estimation).

There are two main task categories mapped via Tags or custom fields:

- **OPEN TASKS – NO DEADLINE** - unplanned, recurring. These are activities common to a given project work with no specific end date.
- **REGULAR TASKS - WITH DEADLINE** – with time fence, assignee selected, deadline stated and Initially Planned Hours.

4.1 STAGES (SECTIONS)

Stages in Odoo (represented as Kanban columns) are the steps a task goes through (e.g., New, In Progress, Done). If you need sub-projects, Odoo utilizes *Milestones* or simply sub-tasks within parent tasks to differentiate groups of work like JPK Implementation.

4.2 WORKING WITH TASKS

To create a task, navigate to your Project and click the **"New"** button. Enter the following fields:

1. **Task Title*** - enter a title which is understandable for the team members as well as for a customer;
2. **Project*** - verify the correct project is selected;
3. **Assignees** - select from the list of employees if resource is known;
4. **Tags** - use tags to define if it is a standard Task, Bug, or To Do;
5. **Customer** - should auto-populate from the project, represents who ordered the task;
6. **Deadline*** - completion date required by customer;
7. **Initially Planned Hours** - set a number if a time is estimated – this will have an impact on task budget and progress bars.
8. **Description** – details on a work to be done. You can use the rich text editor to add links, tables, or formatting.

After you have created a task, you can improve it using Odoo's interface features:

- In the **Chatter** (bottom or right side), add *Followers* who need to track progress.
- Use the paperclip icon in the chatter to **Attach files/documents**.
- Under the **Sub-tasks** tab, you can break down the work into smaller assignments.

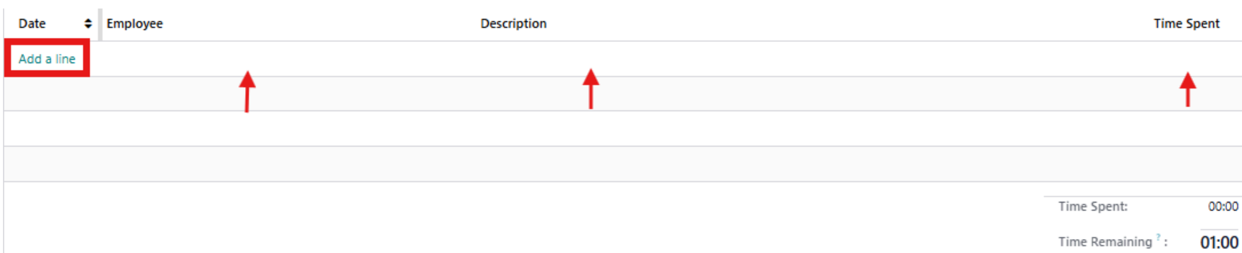
4.3 TIMESHEET REPORTING

Time reporting should be done weekly, by the end of the week. You can report time directly on the Task or via the **Timesheets App**.

Timesheets

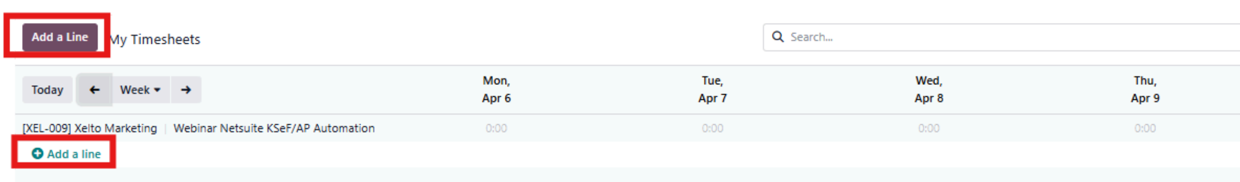
How to report time directly on a Task:

1. Open the Task.
2. Go to the **Timesheets** tab inside the task.
3. Click **Add a line**.
4. **Date*** - select the date the work was performed.
5. **Employee*** - your name (auto-filled).
6. **Description*** - enter detail task description understandable for a customer (for example task's or incident's number and description).
7. **Hours Spent*** - enter time spent; round a value to 30 minutes (e.g., 1.5 for 1h 30m).
8. Check if the task line is Billable/Non-billable (if configured by Xelto admin). Select non-billable only when the Customer will not be charged (guarantee).

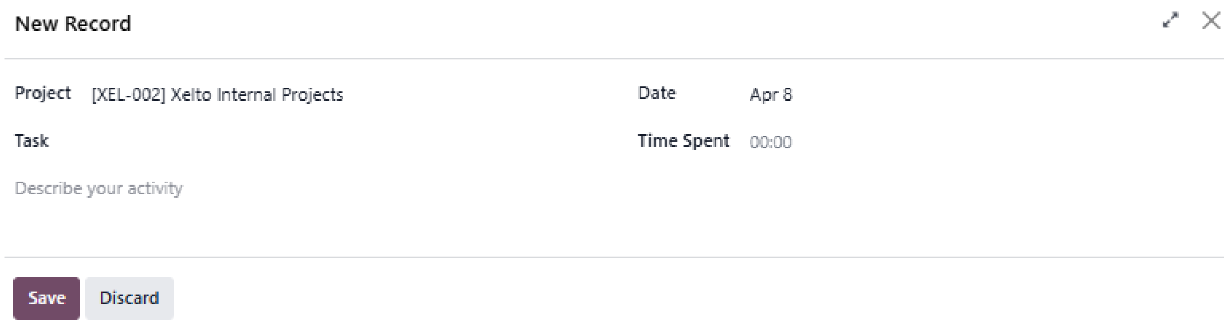


How to report time via the Timesheets App:

1. Open the **Timesheets** app from the main Odoo dashboard.
2. Click **New** (or click directly on the specific day in the Grid view).



3. Select the **Project*** and **Task*** you worked on.
4. Fill in the **Description*** and **Hours Spent***.
5. Save your entry.



4.4 TIMESHEET APPROVAL

After a week is done, your manager will validate the timesheets in Odoo. Ensure all your entries for the week are completed no later than Monday 9:00 a.m. of the consequent week.
In case a month closes in the middle of the week, ensure the timesheets covering the previous month are entered by the end of the last working day of the current month.

Important Note: Once your timesheets are validated by your manager, they become locked and can no longer be modified. Because of this strict closure, utmost accuracy and daily diligence when logging your hours are essential. Please always double-check your entries before the weekly deadline.

5. HELPDESK (TICKET MANAGEMENT)

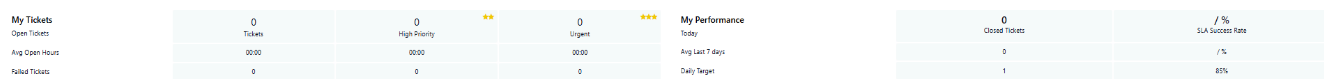
The Helpdesk module in Odoo is used for centrally managing tickets from external customers and internal employees. It allows for organized communication, progress tracking, and monitoring response times (SLA metrics).

5.1 HELPDESK OVERVIEW

Upon entering the Helpdesk app from the main dashboard, you will default to the Overview tab. This screen is divided into two main sections:

My Tickets & My Performance:

- Here you will see a quick summary of tickets assigned exclusively to you (categorized into Open, High Priority, Urgent).
- Next to it, you can find your performance metrics, including the SLA Success Rate, which indicates whether you are closing tickets within the required timeframe.



Support Teams:

- Below the statistics, you will find cards for individual support departments/channels. Each team has a dedicated email address where customers send their issues. In the XELTO system, we distinguish, among others:
    - **Internal Topics** (internal@support.xelto.com) – internal tickets and issues.
    - **Main Xelto Support** (support@support.xelto.com) – the main technical support channel.
    - **Czechia Support** (czechia@support.xelto.com) – a dedicated channel for support in Czechia.
    - **Customer Care - XELTO** (customer-care@xelto.com) – ongoing customer service.
    - **Customer Care - XELTO DIGITAL** (xxx) – ongoing customer service.
- On each team's card, you can immediately see the number of Open, Unassigned, and Urgent tickets.

5.2 WORKING WITH TICKETS

To start working with tickets, click the **Tickets** button on a specific team's card or select the Tickets tab from the top menu bar.

1. **Taking a ticket:** New tickets from customers usually arrive as "Unassigned". Open the

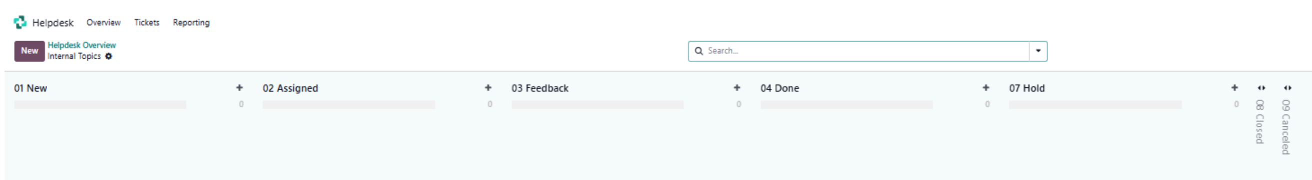
ticket you want to handle and assign it to yourself using the *Assignee* field.

2. **Communicating with the customer:** This is done exactly the same way as with Tasks - via the **Chatter** (at the bottom or right side of the screen).
   - Use the **Send message** option to reply to the customer (the reply will go directly to their email inbox).
   - Use the **Log note** option if you want to leave technical information visible **only** to the internal XELTO team (the customer will not see this).

5.3 TIMESHEET REPORTING IN HELPDESK

Just like in the Projects module, the time spent resolving a customer's issue must be reported.

- Open the specific Ticket.
- Go to the **Timesheets** tab inside the ticket.
- Click **Add a line** and enter the time spent along with a detailed description of the actions taken (following the rules described in section 4.3 of this guide).
- Pay close attention to whether a given intervention is Billable or if it is, for example, support under guarantee (Non-billable).



6. CONTACTS (DIRECTORY)

The Contacts app serves as the central address book for XELTO. It stores the details of all our clients, prospects, vendors, and individual contact persons within those organizations.

Important Note regarding Permissions: Access to create, edit, or delete records in the Contacts module is restricted. Only authorized personnel - such as the Sales team, Administration, and designated managers - have the rights to modify these entries. Regular users typically have "read-only" access to view contact information for project needs.

6.1 USING THE CONTACTS LIST

When you open the Contacts app, you will see a list view or a Kanban view of all entries.

- **Search & Filters:** Use the search bar at the top to quickly find a specific company or person. You can filter by tags, country, or relationship type (e.g., Customer, Prospect).
- **Hierarchical Structure:** Odoo links individual people to their parent companies. In the list, you might see a main company record (e.g., "ACCACE SP. Z O.O.") and beneath it, or indented, the specific employees working there (e.g., "ACCACE SP. Z O.O., Norbert Sołtysiak").
- **Key Information Displayed:** The list view provides quick access to vital details:
  - **Name:** The company or person's name.
  - **Email & Phone:** Direct contact details.
  - **Salesperson:** The Xelto representative assigned to the account (e.g., Tomas Bucha, Tomasz Siola).
  - **Relationship Type:** Indicates if they are a Customer, Prospect, Vendor, etc.
  - **Tags:** Useful for categorization (e.g., *NetSuite*, *XD Czechia*, *XD Digital*).

6.2 VIEWING CONTACT DETAILS

If you need more information, simply click on a contact's row to open their full record. Inside, you will find:

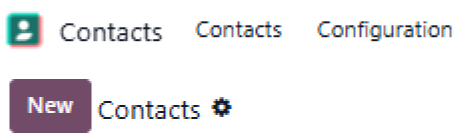
- Full address details.
- Any active opportunities or sales orders linked to them.
- A dedicated **Chatter**, where you can see the history of communication, logged notes, and scheduled activities (like planned calls or meetings) concerning that specific client.

6.3 CREATING A NEW CONTACT

Important Note: As mentioned above, only authorized personnel (e.g., Sales, Administration) have the permissions required to create or edit contacts in the system.

If you have the appropriate access rights, you can create a new contact record by following these steps:

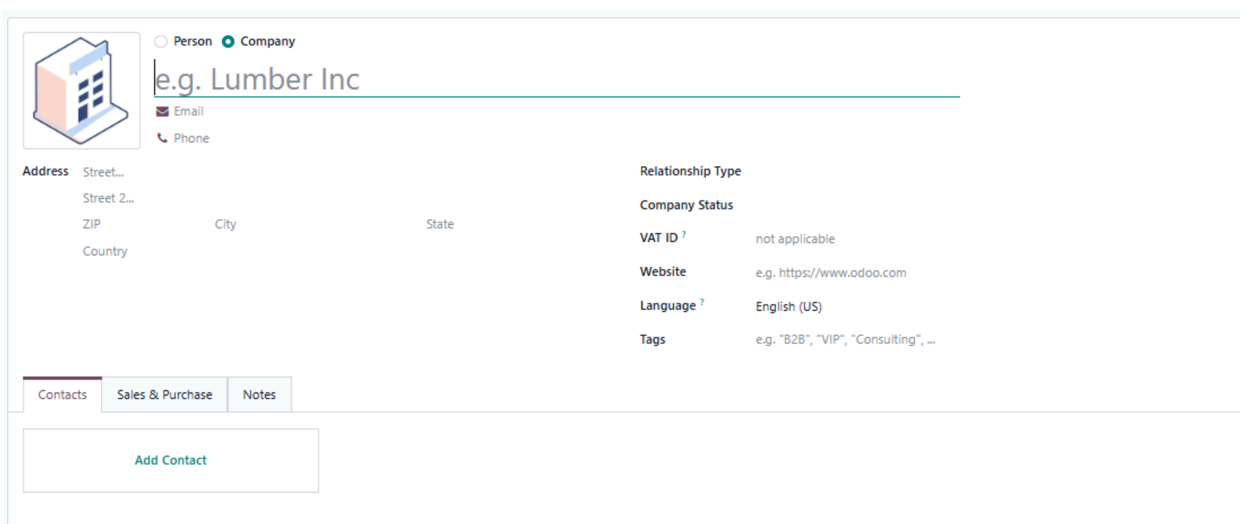
1. Click the **New** button in the top left corner of the Contacts app.



2. Select the **Type**: Choose whether this new record is an individual **Person** or a **Company**.

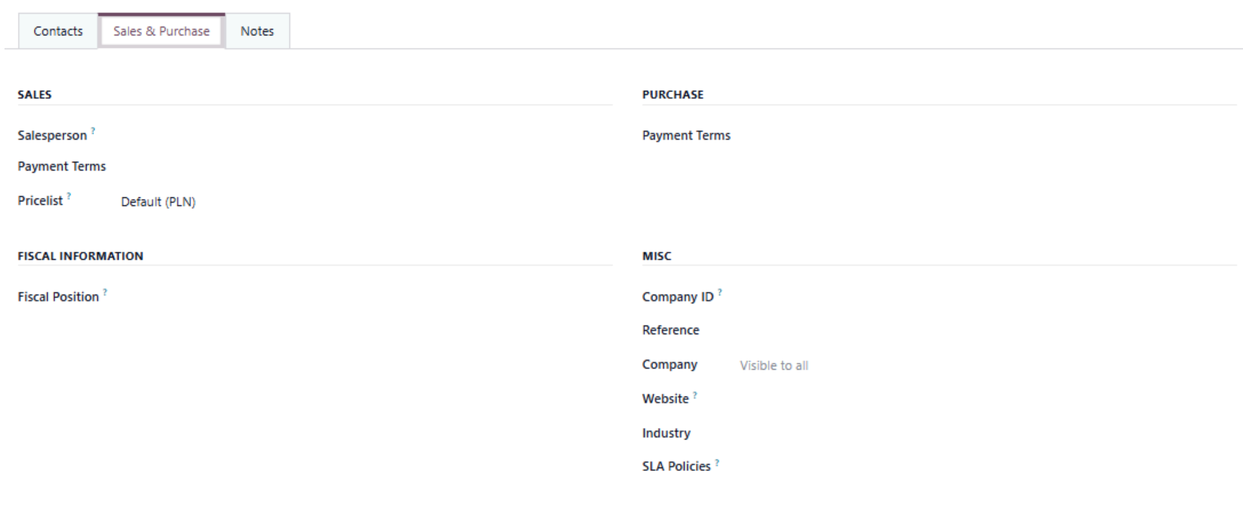
General Information Tab:

- **Name:** Enter the full name of the company or the individual person.
- **Address:** Fill in the Street, ZIP code, City, State, and Country.
- **Contact Details:** Enter the primary **Email** and **Phone** number.
- **Relationship Type:** Specify the nature of the relationship (e.g., Customer, Prospect, Vendor).
- **Company Status:** (If applicable) Note the current standing of the company.
- **VAT ID:** Enter the company's tax identification number.
- **Website:** Add the company's URL.
- **Language:** Set the preferred communication language for this contact.
- **Tags:** Apply relevant tags for easy filtering and categorization (e.g., "NetSuite", "VIP", "XD Czechia").



Sales & Purchase Tab: This tab holds crucial commercial information.

- **Salesperson:** Assign the specific Xelto representative responsible for this account.
- **Payment Terms:** Define the agreed-upon payment schedule (for both Sales and Purchases, if applicable).
- **Pricelist:** Ensure the correct default currency/pricelist is selected (e.g., Default (PLN)).
- **Fiscal Position:** Set the tax mapping rules if they differ from the default.
- **MISC (Miscellaneous):**
    - **Company ID / Reference:** Internal identification numbers.
    - **Company:** Leave as "Visible to all" or restrict access if dealing with multi-company setups.
    - **Industry:** Specify the client's business sector.
    - **SLA Policies:** Link any specific Service Level Agreements tied to this client for Helpdesk purposes.



Adding Linked Contacts (Contacts Tab): If you are creating a "Company" record, you can use the **Add Contact** button at the bottom of the main "Contacts" tab to nest individual employees under that parent company.

Once all details are filled out, save the record.

7. ABSENCES (TIME OFF)

7.1 ABSENCE REGISTRATION

It is mandatory to register planned absences using the **Time Off App**. Go to Time Off -> My Time Off -> **New Time Off Request**.

- **Time Off Type:** select Vacation, Sick Leave, or other appropriate type.
- **Dates:** select the Start and End date.
- **Description:** optional note.

Save and wait for manager approval. An absence longer than a week should be planned 2 months in advance. The approved time off will typically reflect on your schedule and block timesheet capacity.

7.2 ABSENCE/SICK LEAVE TIME REPORTING

In Odoo, approved Time Off automatically generates timesheet entries under a default "Internal/Leave" project depending on configuration. Always verify your weekly timesheet to ensure your 40 hours (or contracted time) are fully accounted for between actual project tasks and approved time off.

8. CRM (CUSTOMER RELATIONSHIP MANAGEMENT)

The **CRM** app in Odoo is the core tool used for tracking potential sales, managing interactions with prospects, and forecasting revenue.

Important Note regarding Permissions: Similar to the Contacts module, the CRM app contains sensitive commercial data. Access to create, move, or edit Leads and Opportunities is restricted strictly to authorized personnel, primarily the Sales team, Team Leaders, and Administration.

8.1 SALES TEAMS

To keep sales data organized across different business units, XELTO divides the CRM into specific **Sales Teams**. Each team manages its own separate pipeline and deals. As configured in the system, the main Sales Teams include:

- **Xelto JD Edwards / Xelcode / Xel Apps** (Assigned to XELTO SP. Z O.O.)
- **Netsuite** (Assigned to XELTO SP. Z O.O.)
- **Digital** (Assigned to XELTO DIGITAL SP. Z O.O.)
- **Digital Czechia** (Assigned to XELTO DIGITAL CZECHIA S.R.O.)

You can switch between different team pipelines using the search and filter bar at the top of the CRM dashboard (e.g., filtering by Sales Team: Digital).

8.2 THE SALES PIPELINE & STATUSES

When you open a specific Sales Team's pipeline, you will see a Kanban (board) view. This visual representation tracks the lifecycle of a potential deal from the first contact to a signed contract.

You must diligently update the status of your deals by dragging and dropping the opportunity cards from left to right as the negotiations progress.
The standard stages (statuses) are:

1. **Lead:** A raw, unqualified prospect or initial inquiry.
2. **Opportunity:** A qualified lead showing genuine interest.
3. **Meetings/Analysis:** The phase where requirements are gathered, and scoping meetings occur.
4. **Proposition:** A formal offer, quote, or estimate has been presented to the client.
5. **Contracting/Legal:** Final negotiations, NDA signing, and contract drafting.
6. **Won:** The deal is officially closed and signed.
7. **On Hold:** The project or deal is temporarily frozen by the client.

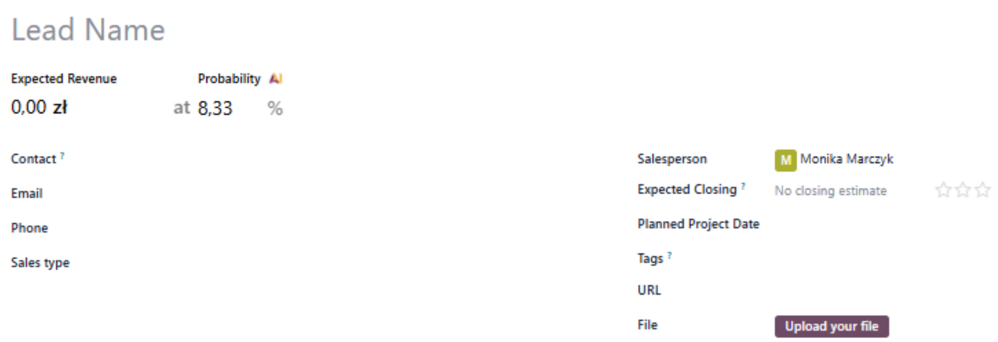
8. **Post-Sale:** Follow-up activities after the deal is won.

8.3 CREATING AND UPDATING AN OPPORTUNITY

Keeping your opportunities updated is crucial for accurate company revenue forecasting. To register a new potential deal, click the **New** button in the top-left corner of the pipeline.

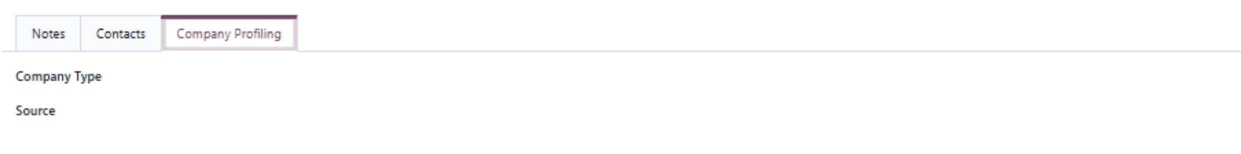
Fill out the form using the following key fields:

- **Lead Name***: Give the deal a clear, recognizable title.
- **Expected Revenue & Probability:** Enter the estimated value of the deal. The system will calculate a probability percentage, but you can manually adjust it based on your assessment of winning the deal.
- **Contact details:** Link the existing **Contact** from the database (Email and Phone will auto-populate).
- **Sales type:** Specify the nature of the service being sold.
- **Salesperson:** Assign the specific Xelto representative leading this deal.
- **Expected Closing:** Provide a realistic date when you expect the contract to be signed.
- **Planned Project Date:** Indicate when the actual project work is scheduled to begin.
- **Tags:** Use tags to categorize the deal (e.g., technology used, specific industry).
- **Upload your file:** Attach any relevant initial documents like RFPs, client briefs, or specifications.



Bottom Tabs:

- **Notes:** Leave internal descriptions regarding the scope of the deal.
- **Company Profiling:** Additional commercial details about the prospect.



Managing the Deal: Once created, utilize the **Chatter** on the right side of the screen to Log notes after every client meeting or call.
When the client is ready for a formal offer, you can use the **New Quotation** button at the top left of the opportunity to generate a pricing proposal directly linked to this deal. If the deal is approved or rejected, remember to click the **Won** or **Lost** buttons at the top of the record.

9. SUMMARY

Odoo serves as the central platform for XELTO, designed to streamline our daily workflows, ranging from project and task management to timesheet reporting, customer support, and sales tracking.

To ensure the system works effectively for everyone and supports our business goals, please keep the following best practices in mind:

- **Accuracy and Timeliness**: Regularly update the status of your tasks, Helpdesk tickets, and CRM opportunities. Accurate and timely timesheet reporting is especially critical, as it directly impacts project budgets, customer invoicing, and your monthly settlements. Remember that validated timesheets cannot be modified.
- **Data Integrity**: Respect system permissions. Modules like Contacts, CRM, and Project Creation contain sensitive data and should only be modified by authorized personnel. If you need a record created or updated and lack the permissions, please coordinate with the Administration or Sales team.
- **Centralized Communication**: Always utilize the Chatter feature across all modules. Keeping conversations, internal notes, and files attached directly to the relevant task, ticket, or project ensures transparency and saves time for the entire team.

By maintaining these standards, we ensure smooth internal collaboration and high-quality service for our customers. If you encounter any technical issues, forget your login credentials, or have questions regarding specific Odoo functionalities, please reach out to the XELTO Administration team for support.