

Case study: HydroTerra-Environmental Monitoring Specialists

About Client

HydroTerra is a well known team of technical expertise and specialises in the implementation of custom environmental monitoring solutions. Improvements in environmental monitoring effectiveness and efficiency in informing management decisions is at the forefront of HydroTerra's drive for adoption of innovative technologies and after more than 10 years in the environmental sector, HydroTerra is a leader in the field.

Products & Services

HydroTerra Pty. Ltd. Is working in the field of environmental monitoring, reporting

Their activities span a diverse range of industry sectors, including:

- Landfill Management
- Natural Resource Management
- Research & Development
- Contaminated Land & Remediation
- Mining
- Coal Seam Gas
- Agriculture

The Need for a Solution

HydoTerra needed to manage the workflow of Sales, Purchase, and Inventory with mapping to current Organizational process of accounting with a robust enterprise solution that caters to its specific needs and business flows.

HydoTerra had evaluated multiple software solutions to address the issues and finalized on OpenERP based on its modular approach and flexibility and being completely open source in nature. Pragmatic was shortlisted from amongst various vendors for its credibility in the field of creating bespoke OpenERP Solutions.

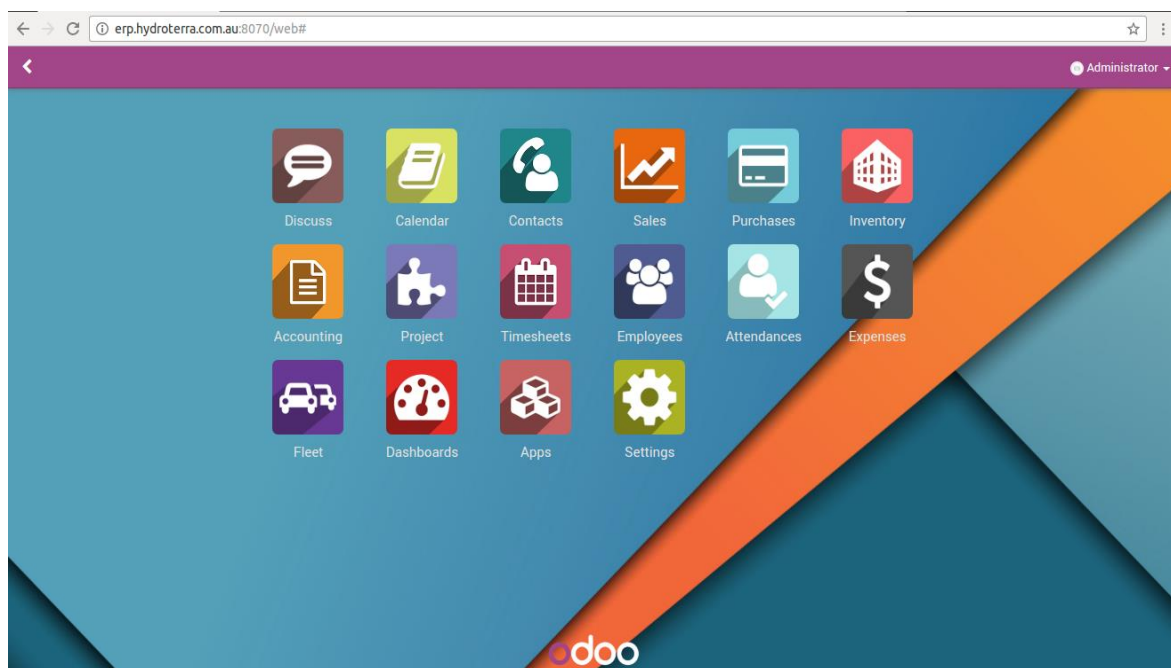
The technical team with HydroTerra had undergone trainings of Odoo to evaluate and also implemented the community edition for checking the workflows. They had identified critical workflow changes that need to be in place to make the implementation successful. The team was very clear on requirements, business challenges and wanted the software changes to match exactly to the business flow, as they did not want to change the age old success formula for getting software implemented.

Pragmatic had taken this challenge and designed solution in line with requirement and core workflows by customizing on inherited flows to map with the actual business flow.

Solution

In Order to support their regular business activities, Pragmatic Techsoft Pvt. Ltd. Proposed Odoo with following modules:

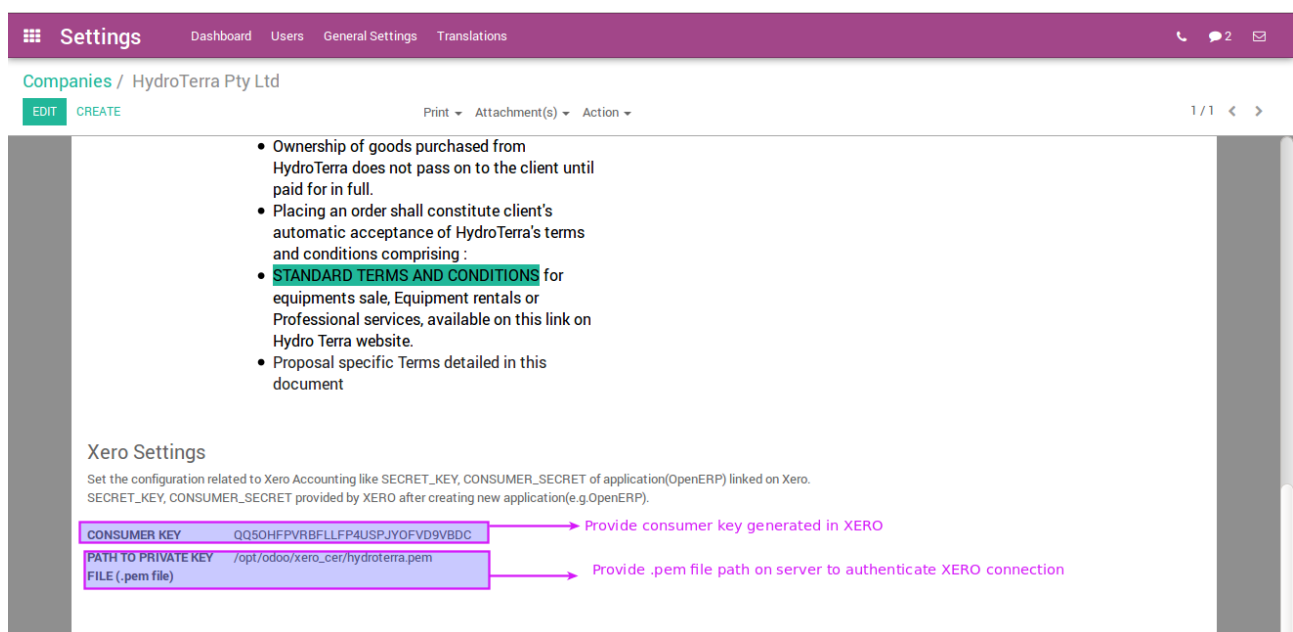
- Sales
- Purchase
- Projects
- Timesheets
- XERO Integration



XERO Accounting & Odoo Integration

Pragmatic has taken an initiative to create a module for Xero Accounting & Odoo integration. This module helps HydroTerra to export supplier and

customer invoices created in Odoo to Xero Accounting system. And also import payments from Xero Accounting to odoo.



The screenshot shows the Odoo Settings interface for Xero Accounting integration. The top navigation bar includes 'Settings', 'Dashboard', 'Users', 'General Settings', and 'Translations'. The breadcrumb trail is 'Companies / HydroTerra Pty Ltd'. The main content area displays a list of terms and conditions for Xero Accounting integration, followed by a 'Xero Settings' section. The 'Xero Settings' section contains two configuration fields: 'CONSUMER KEY' with the value 'QQ50HFPVRBFLFP4USPJYQFVD9VBDC' and 'PATH TO PRIVATE KEY FILE (.pem file)' with the value '/opt/odoo/xero_cer/hydroterra.pem'. Arrows point from these fields to explanatory text: 'Provide consumer key generated in XERO' and 'Provide .pem file path on server to authenticate XERO connection'.

- Ownership of goods purchased from HydroTerra does not pass on to the client until paid for in full.
- Placing an order shall constitute client's automatic acceptance of HydroTerra's terms and conditions comprising :
- **STANDARD TERMS AND CONDITIONS** for equipments sale, Equipment rentals or Professional services, available on this link on Hydro Terra website.
- Proposal specific Terms detailed in this document

Xero Settings

Set the configuration related to Xero Accounting like SECRET_KEY, CONSUMER_SECRET of application(OpenERP) linked on Xero. SECRET_KEY, CONSUMER_SECRET provided by XERO after creating new application(e.g.OpenERP).

| | | |
|--------------------------------------|-----------------------------------|--|
| CONSUMER KEY | QQ50HFPVRBFLFP4USPJYQFVD9VBDC | → Provide consumer key generated in XERO |
| PATH TO PRIVATE KEY FILE (.pem file) | /opt/odoo/xero_cer/hydroterra.pem | → Provide .pem file path on server to authenticate XERO connection |

Accounting

With the complete flow in place, the data captured were thoroughly scrutinized by the accounts dept for the following:

- Sales Invoices
- Sales Commission
- Stock valuation
- Stock take and reconciliation

Project Dashboard Search Forecast Reports Configuration

Projects / Tasks / 16-00049:Senior Engineer/Scientist

SAVE DISCARD 1/1 < >

☆ 16-00049:Senior Engineer/Scientist

Project: 16-00049 Deadline: 10/12/2016
 Assigned To: Alexander Gervis Tags:
 Initially Planned Hours: 08:00 Working Time Progress: 25%

DESCRIPTION **TIMESHEETS** EXTRA INFO

| Date | User | Description | Analytic Account | Billable Hrs | Non Billable Hrs | Total Hrs |
|------------|------------------|-------------------------|--|--------------|------------------|-----------|
| 10/12/2016 | Alexander Gervis | Testing of water sample | [Cust000120016] 16-00049 - 360 Environmental Pty Ltd | 02:00 | 00:00 | 02:00 |

Add an item

Hours Spent : 02:00

The results were highly satisfactory with minor adjustments based on workflows.

Timesheet: Pragmatic has improved their timesheet management software and updated it with Odoo for better performance and for calculating billable and non-billable hours.

You are currently using a trial account. Upgrade now

HydroTerra Test Jeeva Prakasan

Dashboard Accounts Payroll Reports Contacts Settings

Sales Invoices

New Invoice New Credit Note Send Statements Import Export Invoice reminders off

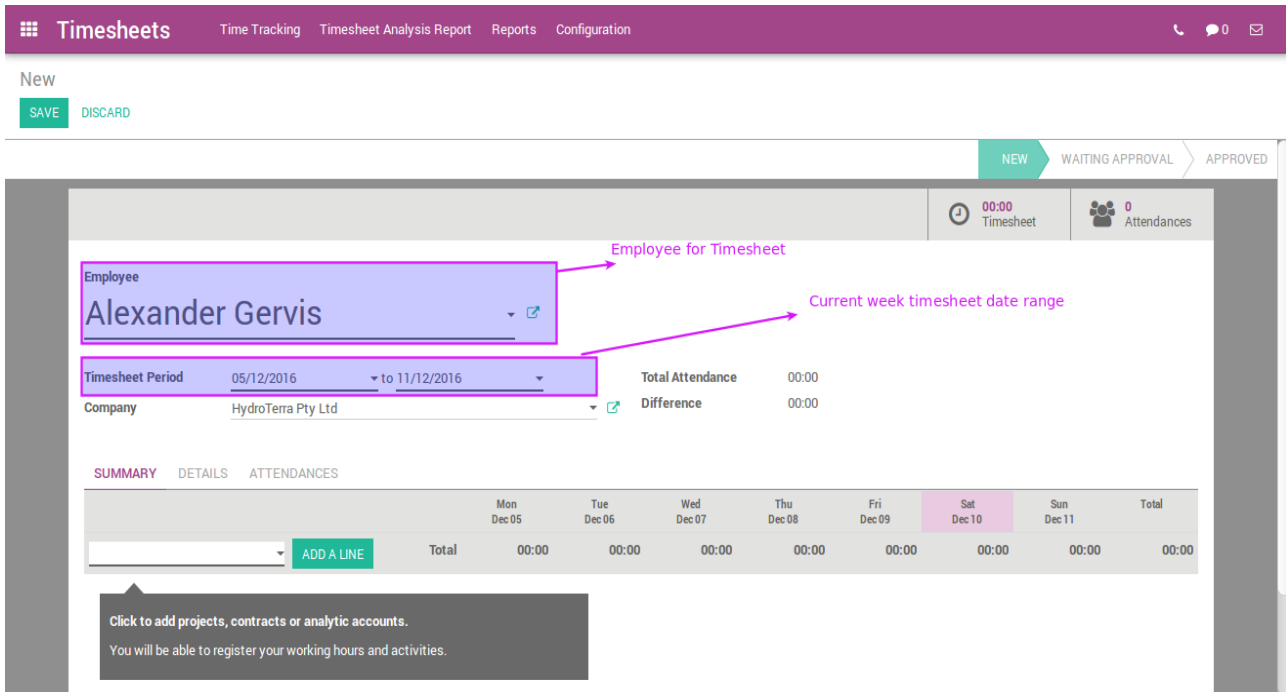
All Draft (2) Awaiting Approval (0) Awaiting Payment (0) Paid Repeating

Submit for approval Approve Delete Print Email Copy to... No items selected 2 items | 705.24 AUD Search

| Number | Ref | To | Date | Due Date | Due |
|----------|-----------------------------|-----------------------------------|------------|------------|------------|
| INV-0006 | Bronwyn 123-INV/2016/0014 | 4T Consultants Pty Ltd | 5 Dec 2016 | 4 Jan 2017 | 110.00 |
| INV-0012 | 2368273827382-INV/2016/0003 | Coffey Environments Pty Ltd (Vic) | 9 Nov 2016 | 9 Dec 2016 | 447.22 USD |

Separate sequence of XERO Invoice Number From Odoo

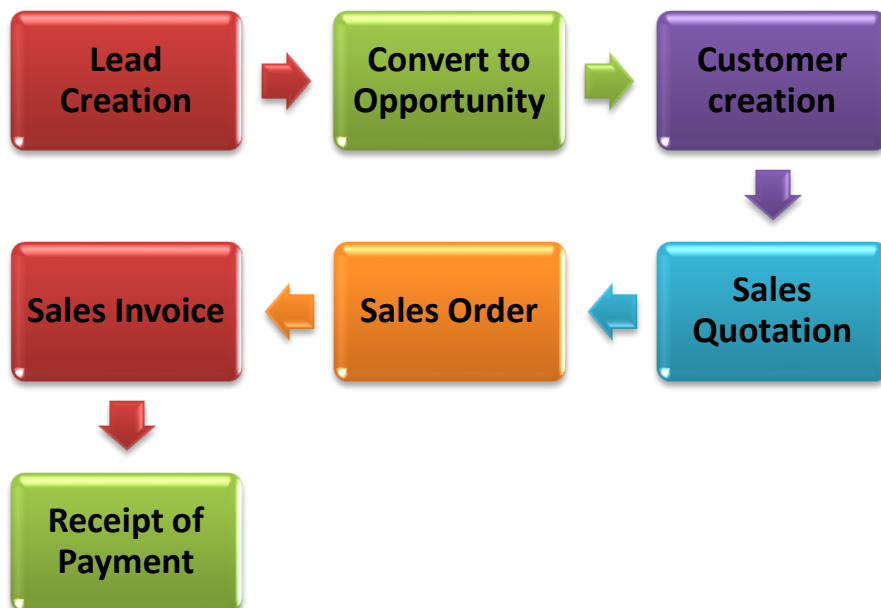
System showing weekly timesheet view for a current running week



The screenshot displays the 'Timesheets' application interface. At the top, there is a navigation bar with 'Timesheets' and sub-links for 'Time Tracking', 'Timesheet Analysis Report', 'Reports', and 'Configuration'. Below this, a 'New' section contains 'SAVE' and 'DISCARD' buttons. The main content area shows a form for creating a new timesheet. The 'Employee' field is set to 'Alexander Gervis', and the 'Timesheet Period' is set to '05/12/2016 to 11/12/2016'. The 'Company' is 'HydroTerra Pty Ltd'. A summary table shows 'Total Attendance' and 'Difference' as '00:00'. Below the form, there are tabs for 'SUMMARY', 'DETAILS', and 'ATTENDANCES'. The 'SUMMARY' tab is active, showing a table with columns for days of the week (Mon Dec 05 to Sun Dec 11) and a 'Total' column. All time entries are currently '00:00'. A 'NEW' button is visible above the table. A tooltip at the bottom left reads: 'Click to add projects, contracts or analytic accounts. You will be able to register your working hours and activities.'

Project Management: for keeping records of projects and purchase order. Pragmatic has integrated and update Timesheet applications in such a way that's it's easy for HydroTerra teams to calculate exact time require to execute the project. They have the facility to evaluate budget Vs actual time spent as well. As the time period of some projects is around 1-2 yrs, Tacking of task allocation, task completion becomes crucial. To streamline project execution task along with billable & non-billable hours need to be recorded in detail.

Sales flow cycle: Odoo follows a complete life cycle for driving sales starting from lead creation pages till generating receipt of final payment. The process follows each and every step in the detailed and recorded format.



Success Points

Mapping to Customers existing business flows with the successful installation of XERO accounting with Odoo integration is completed. Now the customer is able to drive business & the sales cycle from single software.