

Sell Services

As your business grows, more and more companies come to you to furnish their new offices. As a response to this, you decided to launch an internal Office Design service. To help your customers evaluate their needs. For this, you will work with Audrey, an interior designer, who makes designs for your prospects.

Install the **Apps** required for the following business flow.

Set up a Project

1

Create a Task

2

Perform the Job

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Sell the Design Service

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Record Timesheet

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Invoice Customer

7



Set up a Project

1

You



I'll **create a project "Office Design"** to structure our services. What are the steps involved in designing an office?



Audrey • Interior Designer

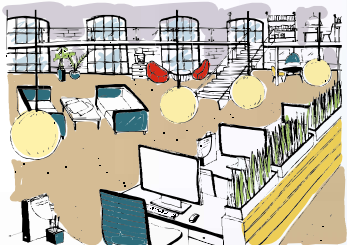
It starts with an on-site **meeting** to check their office and gather info, then I prepare 3 **design proposals**.

Based on their feedback, I model a **floor plan**, then a sales rep does the **quotation** with the new products.

You



Ok thanks. I'll **create the stages** and set the email address "**design@**" on the project, to ease the creation of tasks.



Create a Task



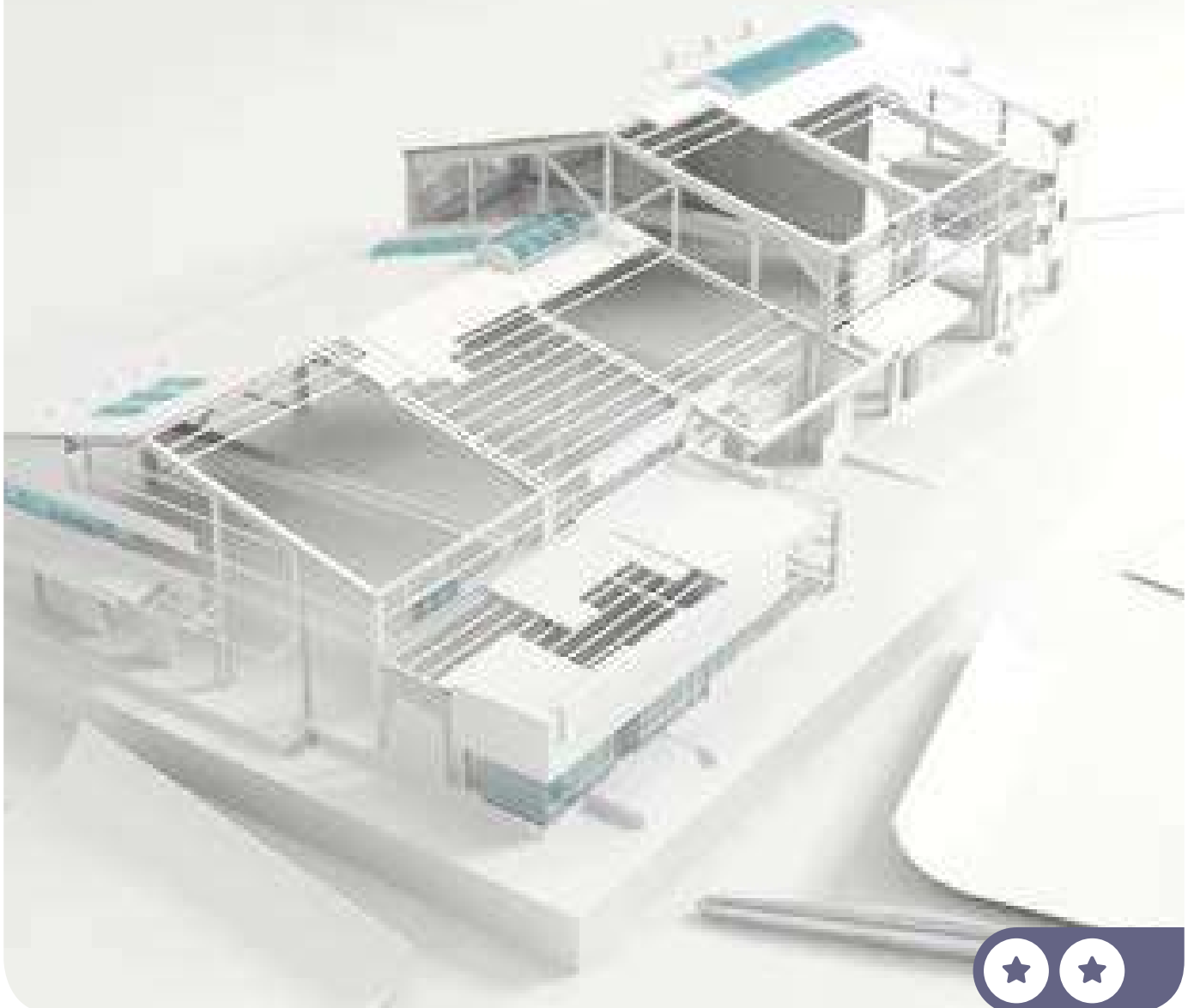
Sophia • Sales Manager

Hi, Boogle asked us to design their new office in New York.

You



Send an email to “design@yourdomainname.odoo.com” with subject “**Boogle NY**” to create a task for Audrey.



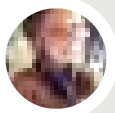
Perform the Job

3

You



Audrey, you should have a new task for “Boogle NY” in the project Office Design. Can you prioritize it?



Audrey • Interior Manager

Ok, I'll **star the task** for priority.

I will be **scheduling a meeting** with the customer next week. Once my **meeting is done**, I'll work on the **design proposal**.



Configure a Product



Sophia • Sales Manager

I think it's a mistake to offer our Office Design services for free. If we sell it, customers will better understand the value of Audrey's work.

You



You're right. We can sell this service at **50\$ per hour**.

I'll **create a product "Office Design Service"** that you can use in your quotations. I'll **configure it** to generate tasks for every sales order.



Sell the Design Service



Sophia • Sales Manager

I just confirmed our first quotation for “**The Jackson Group**”.

We sold an **Office Design Service**, estimated at **20 hours**.
The customer loved it and **confirmed the order** right away!

You



Awesome! Check that the task has been created automatically for Audrey.



Record Timesheet

You



Audrey, don't forget to record your **timesheet on tasks** as we charge customers based on hours spent.



Audrey • Interior Manager

Hold on, I'm on the phone with The Jackson Group.

Ok, I've just started to work on the design of The Jackson Group. I'll log the time spent.

You



Thanks. Use the **Timesheets App**, it's easy.



Invoice Customer



Anita • Accountant

Can you check if we still have **sales orders to invoice**?
I'd like to invoice everything before the end of the month.

You



I **generated the draft invoices**, you can review them.



keep it
simple.

