



Customizing Odoo

How to hack Odoo SaaS to fit
specific business needs

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- **Objective :**
 - Show how Odoo SaaS can be customized to fit specific business needs
- **Audience :**
 - **Integrators** who are too prompt to look at an implementation as a development project
 - **Business owners** who think their business is so specific that an out-of-the-box solution cannot help them

- In an out-of-the-box implementation project, the key success factor is:

Focus on the pain points

- Every salesperson should ask the question :

What are your day-to-day problems?

- Solve those points with Odoo out-of-the box
 - Customization might be needed
 - Most pain points don't require development
- Don't spend anyone's resources developing low-value-added features



Business needs

Receive mission

- The insurance company sends a mission
- Keep track of the request
- Lots of attached files

Assign expert

- Manage a list of experts
- Keep track of which expert is assigned to which task

Follow-up

- Dashboard of the progress of each task
- Detailed documentation of work done

Invoice the company

- Invoicing the work done based on timesheets

Insurance companies

List of experts

All stakeholders

Insurance company

Need to be linked to the CRM at each step of the process



Configuration

Business needs

Demo & Offer

Configuration

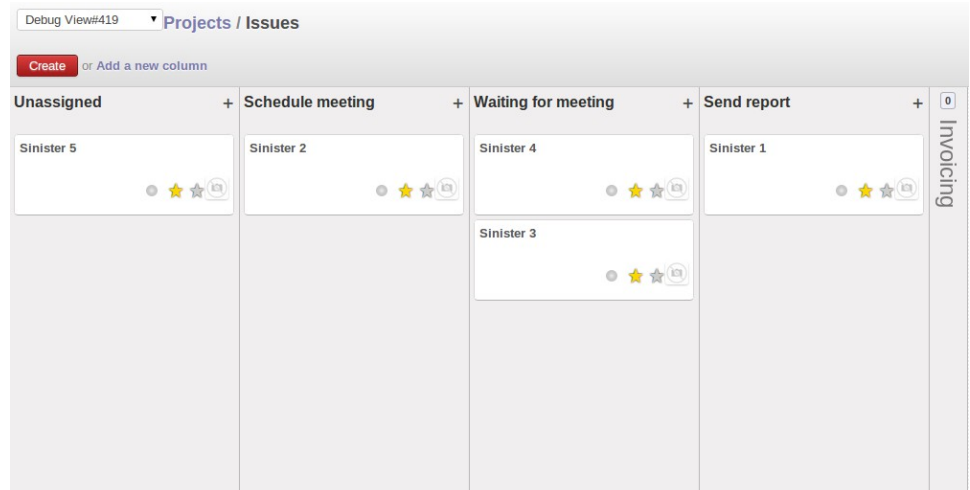
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- How far can we get without customization ?
- Modules :



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Business needs

Demo & Offer

Configuration

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- Configuration

- Install « Issue tracker »

- Customizable Kanban view
 - « Responsible » field => Expert
 - « Customer » field => Customer
 - One project per company
 - Aliases working out-of-the box

- Install « Contracts »

- Time tracking
 - Timesheet-based invoicing

- How far can we get without customization?

- Pretty far!



Customization

- x_broker , x_insured , x_insurance_company
- Menu items
- x_broker_id , x_insured_id, x_date
- x_broker_issue_ids , x_insured_issue_ids,
x_company_issue_ids + attrs
- Search view : add assisted search on broker for issues
- Add group by on broker for issues
- Add filter « broker » on the partners

- x_issue_id on the invoice
 - Display the date, broker, insured (new line of blocks in the header)
- Create a new report : Sinister summary
 - Title : name
 - Blocks : date, broker, insured
 - Table : worklogs

- Display a page with the list of companies we work with
- Create a list of issues with a link to the details of this issue (if enough time)
 - Pass the Issue id as a GET parameter
 - Use `request.params.get('issue_id', False)`

- When an issue is assigned, send a mail
- When an issue has been in the same column for 1 week, send a mail
- Add a constraint :
« If it's not in Unassigned, there must be an expert assigned. »

Business needs

Demo & Offer

Configuration

Static customization

Conclusion

And the icing on the cake :

You can import all of this on the SaaS !

- Import models, fields, views, access rights, menus, actions, web pages, images, CSS, JS, ..
- Only restriction : You cannot import python files.
- Ideal to
 - « reuse » customization
 - test your customization in a QA environment
 - Upon migration,
 - When upgrading your customization
- Demo : insurance_experts.zip
 - https://github.com/sve-odoo/uploadable_modules/blob/master/insurance_experts/

Business needs

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Static customization

Conclusion

- **With great power comes great responsibility**
 - It's easy and quick
 - The sky is the limit
 - **But keep in mind** that, even if you do everything well,
 - The less you customize, the lower the migration risk
 - The more you customize, the higher the maintenance costs
 - Customization is very effective to convince customers
 - But in the end, you can avoid it in a lot of cases
 - **Always** make sure that the demand is based on a real business need, not on a whim

