TechNext

EDITION 2026/27

BIR COMPLIANCE · ODOO ERP · ENTERPRISE AI · WEBSITES

Services Catalogue

Your trusted expert adviser for ERP and compliance. Nineteen services across four practices, led by BIR requirements, set up in your Odoo. You don't need to hire your own team.

BIR E-INVOICING DEADLINE **31 Dec 2026**

odoo Ready Partner

25+	90+	3	4
countries served	enterprise clients	hubs: SG · PH · VN	practices

ABOUT TECHNEXT

Your trusted expert adviser for ERP and compliance.

TechNext Pte. Ltd. is a Singapore-based Odoo Ready Partner. For Philippine companies we lead with Odoo, set up by our own experts for BIR requirements: e-invoicing planning, CAS or CBA books, 2307s and alphalists. We also implement Odoo ERP end to end, build enterprise AI, and run websites and brand design.

Sales, discovery and on-site work run from our Singapore headquarters. Odoo configuration, custom modules and integrations are built at our main development and consulting hub in Taguig City, Metro Manila, and our AI engineers in Ho Chi Minh City join whenever AI is in scope. One project, one team, and the same people after go-live.

HOW WE WORK

- **Discovery before a pitch.** We map how the business runs before we propose anything.
- **Standard first.** Configure before customising; custom only where it earns its place.
- **Written scope and quotation.** You see what is included, and what is not, before work starts.
- **Yours to keep.** Accounts, data, sites and master files stay in your name.

ABOUT TECHNEXT · CONTINUED

Four practices, one team.

25+
Countries with clients

90+
Enterprise clients

3
Hubs in Singapore, the Philippines and Vietnam

31 Dec
BIR e-invoicing deadline, 2026

01
BIR Compliance
E-invoicing by 31 December 2026, CAS or CBA registration, 2307s, SLSP, SAWT, QAP and audit requests.

02
Odoo ERP
Discovery, configuration, data migration, training, integration and support.

03
Enterprise AI
Knowledge assistants, AI inside Odoo, workflow agents and chatbots, grounded in your own sources, with a person approving anything that moves money, commitments or customer data.

04
Websites & Marketing
Company websites, social media management and brand assets, designed, produced and handed over in your name.

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Reading this catalogue

Each service has a reference code (for example **ERP-01**). Quote the codes you're interested in when you write to **sales@technext.asia**, and we'll come back with a written scope. Screens marked Sample data are illustrations, not client data.

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HOW WE ENGAGE

Every engagement starts with a written scope.

We don't publish a price list, because no two businesses run the same way. Tell us what's manual today, and we come back with a scope and a quotation that states what is included and what is not. Nothing commits you until you say so.

01

Project

One-off, scoped and quoted in writing before work begins.

Used for: **BIR set-up · implementation · customisation · AI · websites · brand**

02

Monthly retainer

A steady monthly plan, scoped to channels and volume.

Used for: **Social media management**

03

Support plan

Agreed response targets, tracked on every ticket.

Used for: **Odoo support after go-live**

04

Standalone discovery

A written scope that is yours to keep, with or without us.

Used for: **Odoo consultation & discovery**

HOW WE ENGAGE · CONTINUED

Clear on cost, ownership and sign-off.

Odoo licences

Billed by Odoo, per user per month, in your name. Our work is quoted separately, so you can see each part clearly.

Ownership

Databases, websites, social accounts, analytics and master files stay in your name, handed over completely.

Approval

Pages, posts and assets are shared for sign-off. AI waits for a person before anything irreversible.

Service page anatomy

1	**Reference code.** Quote it when you write to us, for example BIR-01
2	**What it is.** The service in one headline and a short summary
3	**Illustrated workflow.** A drawn diagram or sample screen, never client data
4	**What's included.** What the scope covers
5	**Specification.** Who it suits, how it is delivered and what you keep
6	**Odoo apps involved.** The apps the work touches, where there are any
7	**Questions clients ask.** Short answers to what we hear most

TechNext

01

PRACTICE 01 · BIR COMPLIANCE

BIR requirements, set up in your Odoo.

E-invoicing by 31 December 2026, CAS or CBA registration, 2307s, SLSP, SAWT, QAP and audit requests. We advise first, set Odoo up for BIR requirements, and stay on after go-live.

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BIR COMPLIANCE · WHERE IT HURTS

What finance teams tell us before an Odoo project.

Eight BIR pains we hear in almost every Philippine discovery call, and what changes once the BIR work lives in one system. Each row points to the service that addresses it.

TODAY	IN ODOO, SET UP BY TECHNEXT
Invoices that can't be sent A printed or emailed PDF. If the system can't transmit sales data to the BIR, it needs work before 31 December 2026.	BIR-01 Invoice flows set up in Odoo; how invoice data reaches the EIS is scoped with you
2307s typed by hand Certificates re-typed and chased every quarter.	BIR-03 2306 and 2307 PDFs generated on vendor bills and, if requested, sent with the payment
Month-end in Excel SLSP, SAWT and QAP rebuilt from spreadsheets.	BIR-03 DAT exports from the same entries as your books
Missing customer 2307s A missing certificate is a credit you can't claim.	BIR-03 Each received 2307 attached to its invoice, with the gaps listed for follow-up

BIR COMPLIANCE · WHERE IT HURTS · CONTINUED

TODAY	IN ODOO, SET UP BY TECHNEXT
CAS paperwork	BIR-02
A system description and sample outputs written from scratch.	The application pack printed from the Odoo you will actually use
Upgrades and the registration	BIR-02
A major change adopted without an updated registration leaves the registration without effect from that date.	The registration update planned alongside each Odoo upgrade
Branches doing it differently	BIR-01
Each branch with its own spreadsheet and invoice habits.	One database: each branch its own journal and series, one consolidated 2550Q
Digging for an audit	BIR-04
Ten days to answer an eLA request, with records in five places.	Audit trail, locked periods and attachments: easier to find and export

Who must e-invoice by 31 December 2026

RR 26-2025 · RMC 98-2026

Covered
E-commerce sellers
Small, medium or large

Covered
LTS accounts
Large Taxpayers Service

Covered
Large taxpayers
RA 11976, RR 8-2024

Covered
CAS or CBA users
With invoicing software

Exempt
Micro taxpayers
Any channel

The BIR Commissioner can require other taxpayers to comply; exporters, incentive-registered enterprises and POS users join later. We confirm your group with your accountant in discovery.

BIR COMPLIANCE · SELF-CHECK

Twelve questions. Tick what is true today.

Three or more boxes left empty, or "not sure"? Bring these pages to a discovery call. An adviser will say what Odoo covers, what it takes, and what to do first before 31 December 2026.

E-invoicing

BIR-01

- [ ] We know whether we are covered by the 31 December 2026 deadline
- [ ] Our system can transmit invoice data to the BIR's EIS, not just print it
- [ ] We have a plan for corrections and for system downtime

Registration

BIR-02

- [ ] Our accounting system is registered as a CAS or CBA for the system we use today
- [ ] We registered our computerised books in ORUS this year
- [ ] No upgrade or new module has changed the system since we registered

BIR COMPLIANCE · SELF-CHECK · CONTINUED

Forms and withholding

BIR-03

- [ ] Our 2307s are generated from bills, not typed by hand
- [ ] SLSP, SAWT and QAP come from our books, not a separate spreadsheet
- [ ] Our invoices show creditable withholding as a separate item (RR 6-2026)

Audit

BIR-04

- [ ] We could produce an examiner's checklist within 10 calendar days
- [ ] Each period is locked after its returns are filed
- [ ] Every bill and invoice is stored with its source document

From "are we covered?" to an e-invoicing plan for your Odoo

1 Confirm your group
With your accountant: covered now, later, or exempt

2 Map your invoice flows
Invoices, credit notes, branches, anything issued outside your system

3 Set up the localisation
Taxes, withholding, BIR reports and invoice layouts, tested on your data

4 Plan the EIS route
What your Odoo version and hosting would need, quoted separately

5 Prepare PTI papers
You apply; we prepare the process flow and sample invoices from your Odoo

6 Go live and stay on
Downtime and correction flows set up before go-live, then support

BIR-01 BIR E-INVOICING PREPARATION

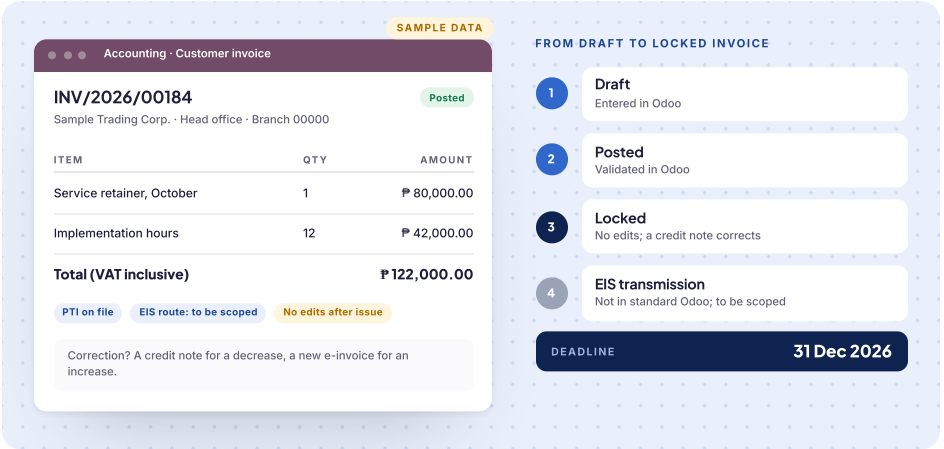
Preparing for BIR e-invoicing.

Covered businesses must issue e-invoices the BIR can receive, not PDFs from a printer. We help you confirm whether you are covered and set up Odoo's invoice flows. Odoo has no built-in EIS connection; any connection is quoted separately.

MODEL	DEADLINE	APPLIES TO
Project, on quotation	31 Dec 2026	Head office and every branch

A SPECIFICATION

BEST FOR	E-commerce sellers, large taxpayers and CAS or CBA users with invoicing software
SEQUENCE	PTI first, then EIS Certification within six months (RMC 98-2026)
BRANCHES	Every branch e-invoices; one system for all of them is simplest
PERMIT	Issued to your business for the system you register
ODOO APPS	Accounting · Invoicing · Sales · Documents



BIR-01 BIR E-INVOICING PREPARATION · CONTINUED

B WHAT'S INCLUDED

- **Coverage check** with your accountant: covered now, later or exempt
- **Invoice flow map**: invoices, credit notes, branches and anything issued by hand
- **EIS route, scoped with you**: Odoo has no built-in connection to the BIR's EIS, and TechNext has not built one
- **No-edit flows**: credit notes for decreases, new e-invoices for increases
- **Downtime plan**: a manual invoice, later replaced by an e-invoice
- **PTI papers**: you apply; we prepare the process flow and sample invoices from your Odoo

C QUESTIONS CLIENTS ASK

Q Are we covered?

Covered now: e-commerce sellers above micro, LTS accounts, large taxpayers and CAS or CBA users. Micro taxpayers are exempt.

Q Isn't a PDF invoice enough?

No. Under RMC 98-2026, a system that only prints invoices is not e-invoicing.

Q Is Odoo BIR-accredited?

No software is. The BIR has accredited no e-invoicing provider (advisory, 14 Sep 2026).

BIR-02 CAS & CBA REGISTRATION SUPPORT

Prepare Odoo for your CAS or CBA application.

The BIR registers your use of a system, not a software brand. We set Odoo up first and prepare the sample printouts with you. You register at your RDO; the decision is the BIR's.

MODEL	FILED AT	EVERY YEAR
Project, on quotation	Your RDO or LT office	You register books in ORUS

A SPECIFICATION

BEST FOR	Businesses moving their books into Odoo, and large taxpayers, who must use a CAS
OUTCOME	A complete application pack; the RDO decides
IN ODOO	Audit trail, hash-secured entries, hard lock dates, Book of Accounts
FILING	Your business files; we prepare the pack with you
ODOO APPS	Accounting · Invoicing · Documents



BIR-02 CAS & CBA REGISTRATION SUPPORT · CONTINUED

B WHAT'S INCLUDED

- **CAS or CBA**: decided by whether your invoices are system-generated
- **Requirements check** against Annex B of RMC 5-2021
- **Application pack** printed from your Odoo: invoices, books, reports, audit trail
- **Cloud set-ups**: the joint sworn statement for Odoo Online or Odoo.sh
- **Book exports** for your own yearly ORUS registration
- **Upgrade planning**: the registration update planned with each major upgrade

C QUESTIONS CLIENTS ASK

Q Is there still a Permit to Use?

No. Since RMC 5-2021 the RDO issues an Acknowledgement Certificate and evaluates afterwards.

Q Does that let us e-invoice?

No. Covered taxpayers also need a Permit to Issue. See BIR-01.

Q Do sister companies register separately?

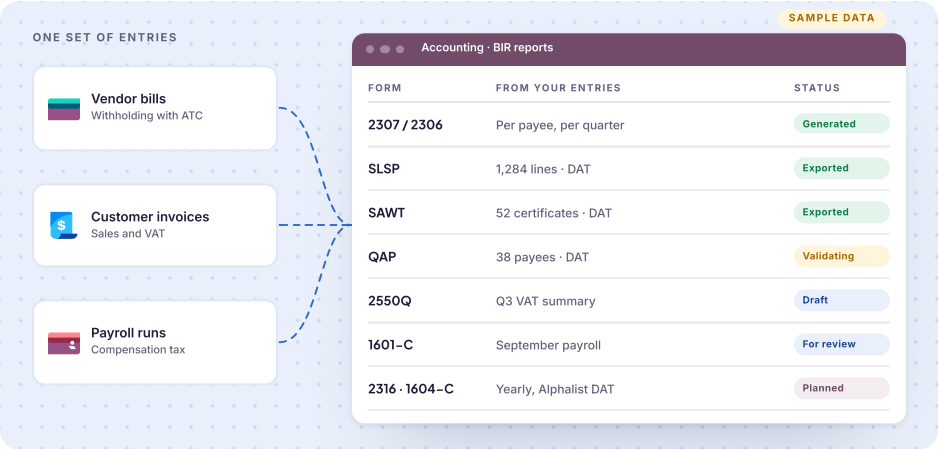
Yes, even on a shared system. In Odoo each is its own company.

BIR-03 BIR FORMS & WITHHOLDING IN ODOO

2307s, SLSP, SAWT and QAP from your entries.

No more re-typing certificates or rebuilding alphalists in Excel. Odoo's Philippine localisation produces the main BIR reports from the entries you already post; we compare them with your last filings.

MODEL	EXPORTS	CHECKED
Project, on quotation	**DAT files for the BIR's tools**	**Against last period's filings**



BIR-03 BIR FORMS & WITHHOLDING IN ODOO · CONTINUED

A WHAT'S INCLUDED

- **Withholding taxes with ATC codes**, mapped with your accountant
- **2306 and 2307 PDFs** on vendor bills, sent on payment if requested (Odoo 20)
- **SLSP, SAWT and QAP** as DAT files, from the same entries as your books
- **VAT and percentage tax**: 2550Q, 1600-VT, and 2551Q for non-VAT companies
- **Basic PH payroll (Odoo 20)**: 1601-C items, 2316, 1604-C worksheets, Alphalist DAT
- **Invoice layout**, withholding as a separate item (RR 6-2026): TechNext configuration

B SPECIFICATION

BEST FOR	Finance teams rebuilding BIR forms from spreadsheets every quarter
REPORT CHECK	Odoo's reports compared line by line with last period's filings
COMPANY RECORD	TIN with branch code and RDO, for the report headers
RATES AND DATES	Confirmed with your accountant; we set up the system
ODOO APPS	Accounting · Purchase · Payroll · Sales

C QUESTIONS CLIENTS ASK

Q Can Odoo generate BIR Form 2307?

Yes. Odoo 20 generates 2306 and 2307 PDFs in the BIR format from vendor bills.

Q And the 2307s customers give us?

Each can be attached to the invoice it covers, and the SAWT is built from them.

Q Does Odoo run Philippine payroll?

Odoo 20 adds basic PH payroll: 1601-C items, the 2316 report and 1604-C worksheets.

BIR-04 BIR AUDIT RECORDS

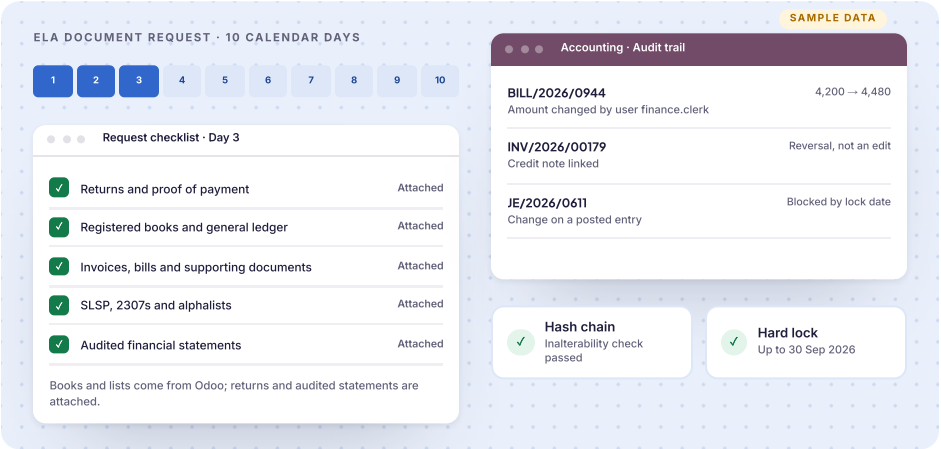
Records in order before an eLA arrives.

You have 10 calendar days to hand over requested records (RMO 22-2026). We set Odoo up so posted entries keep their history and records are easier to find and export.

MODEL	WINDOW	RETENTION
Project or support plan	10 days to submit	Five years minimum

A SPECIFICATION

BEST FOR	Companies expecting an eLA, with records kept in several places
AUDIT RULES	Generally one eLA per taxable year, all taxes (RMO 1-2026)
RETENTION	Five years from the day after the filing deadline (Sec. 235)
OUR PART	We help organise the records in Odoo; your accountant leads the audit
ODOO APPS	Accounting · Documents · Invoicing



BIR-04 BIR AUDIT RECORDS · CONTINUED

B WHAT'S INCLUDED

- **Audit trail**: who changed what and when, with old and new values
- **Secured entries**: posted entries hash-chained and checked
- **Lock dates** after each filing, including hard locks
- **Source documents** attached to every bill and invoice
- **A filing pack per quarter**: return, report and proof of payment
- **A mock request** once a year, against the ten-day window

C QUESTIONS CLIENTS ASK

Q What do examiners ask for?

Returns, registered books, invoices and bills, the SLSP, 2307s, alphalists and audited statements.

Q Can a posted entry be edited?

Posted entries can be hash-secured and locked by date; the audit trail logs changes.

Q Do we still keep ten years?

The legal minimum is now five years; many accountants advise longer.

BIR COMPLIANCE · THE RULES BEHIND IT

The issuances that shape your Odoo setup.

The BIR registers your business and your system, not a software brand.

ISSUANCE · DATE	WHAT IT MEANS FOR YOUR SYSTEM
RR 7-2024 (EOPT Act) 11 Apr 2024	The invoice replaces the official receipt as proof of sale
RR 8-2024 11 Apr 2024	Taxpayer classes, micro to large, that decide whether e-invoicing applies now
RMC 5-2021 · RMO 9-2021 2021	CAS and CBA registration: Acknowledgement Certificate, no Permit to Use
RMC 4-2026 15 Jan 2026	Computerised books registered online through ORUS, every year
RR 26-2025 5 Sep 2025	E-invoicing deadline moved to 31 December 2026 for the covered groups
RMC 98-2026 22 Sep 2026	Working rules: PTI first, EIS Certification within six months, no edits after issue, every branch
RMC 110-2026 12 Oct 2026	Accreditation rules for e-invoicing service providers
RR 6-2026 In force 16 Oct 2026	Creditable withholding tax shown as a separate item on invoices
RMO 22-2026 24 Aug 2026	Audits need a valid eLA, TVN or Mission Order; documents due in 10 days

BIR COMPLIANCE · THE RULES BEHIND IT · CONTINUED

What Odoo 20 already does

- Invoice layouts for BIR and CAS requirements, and a Book of Accounts for CAS and CBA
- BIR 2306 and 2307 certificates as PDFs, generated on vendor bills
- SLSP, SAWT and QAP with DAT exports, the 2550Q, 1600-VT and 2551Q
- Basic PH payroll: 1601-C items, 2316, 1604-C worksheets

TechNext adds

- No EIS connection: Odoo has none built in and TechNext has not built one; any connection is quoted separately
- Invoice layouts and branch flows checked against the guidelines
- Credit-note and manual-invoice catch-up set up before go-live
- Sample outputs and process flow for the CAS and PTI applications you file

About "BIR-accredited" claims

In its public advisory of 14 September 2026, the BIR said it has not accredited or endorsed any e-invoicing service provider. We say Odoo is set up for BIR requirements; the CAS registration and the PTI are issued to your business. **TechNext is an Odoo Ready Partner.** We are not affiliated with, accredited by or acting for the BIR or any government agency, and we do not file or register on your behalf.

BIR issuances as available on 21 October 2026, summarised on technext.asia (bir-e-invoicing and the BIR guides). General guidance, not tax advice: confirm with your accountant or RDO before acting.

02

PRACTICE 02 · ODOO ERP

Odoo ERP, end to end.

Discovery, configuration, data migration, training, integration and support. Accounting, Sales and Inventory first, then the rest of the Odoo suite as the business needs it.

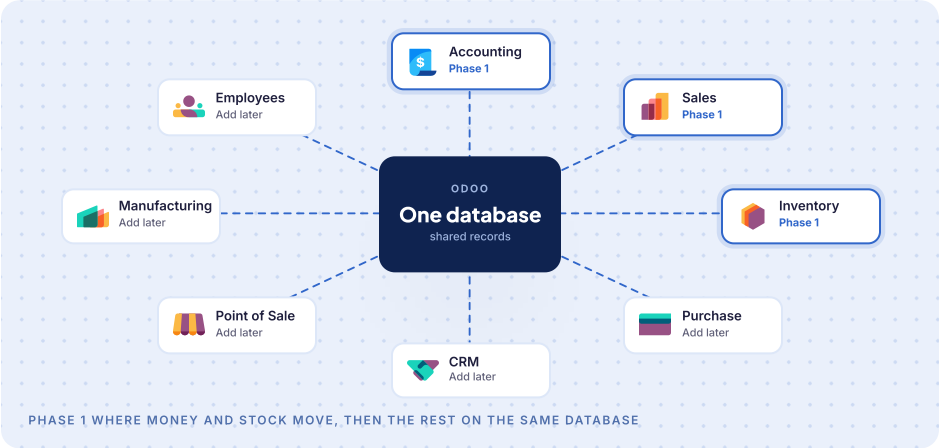
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ERP-01 ODOO ERP IMPLEMENTATION

Odoo ERP implementation.

One database where sales, stock, purchasing and accounting share the same records, set up for BIR requirements in the Philippines. We configure, migrate, train and stay on after go-live.

MODEL	STARTS WITH	HOSTING
Project, on quotation	**Discovery**	**Online · Odoo.sh · On-premise**



ERP-01 ODOO ERP IMPLEMENTATION · CONTINUED

A WHAT'S INCLUDED

- **Discovery** that maps each process to an Odoo app and a written scope
- **Configuration** on a staging copy, never on your live data
- **Data migration**: customers, vendors and products in full; opening balances and open items
- **Role-based training** on your own data, with written guides
- **Integration** with the banks, payments and tools you keep
- **Custom modules** only where standard features can't meet a real requirement; support options after go-live

B SPECIFICATION

BEST FOR	Growing companies that have outgrown spreadsheets and disconnected tools
PHASE 1	Accounting, Sales and Inventory, with the BIR localisation in the Philippines
DELIVERABLES	Scope, configured database, migrated data, trained users, guides
TIMELINE	Agreed in the written scope; the first phase is kept focused so it goes live sooner
ODOO APPS	Accounting · Sales · Inventory · Purchase · CRM · Point of Sale

C QUESTIONS CLIENTS ASK

Q Do we need every module at once?

No. Apps are switched on as you need them, on the same database.

Q Can we keep some existing systems?

Yes. If it works, we connect it through a standard connector or the Odoo API.

Q Where will Odoo run?

Odoo Online, Odoo.sh or your own servers, decided by custom modules and data residency.

ERP-02 ODOO CONSULTATION & DISCOVERY

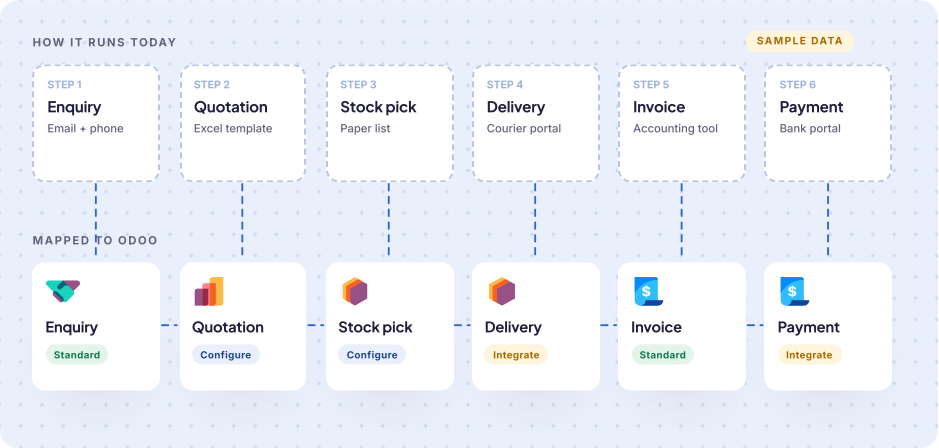
Consultation and discovery.

We map how orders, stock and money move today, match each step to an Odoo app, and hand you a written scope. Discovery stands on its own.

MODEL	FORMAT	OUTPUT
Fixed scope, on quotation	On-site in Singapore or remote	Written scope

A SPECIFICATION

BEST FOR	Teams choosing an ERP, or planning a phase two
WHO ATTENDS	Finance, sales, warehouse and operations, plus whoever signs the scope off
YOUR SYSTEMS	Nothing changes during discovery. It is a mapping exercise, not a cut-over
COMMITMENT	None. The scope is yours to keep
ODOO APPS	Accounting, Sales, Inventory, Purchase, Project, Employees



ERP-02 ODOO CONSULTATION & DISCOVERY · CONTINUED

B WHAT'S INCLUDED

- **Process walkthroughs** with the people who do the work: finance, sales, warehouse and operations
- **Process-to-app map** showing which Odoo app covers each step
- **Gap flags**: each step marked configuration, integration or custom development
- **Migration review**: what data has to move and which systems stay
- **BIR and hosting review**: the BIR forms you file, your e-invoicing coverage, and Odoo Online, Odoo.sh or on-premise
- **Written scope and quotation**, yours to act on with us, another partner or in your own time

C QUESTIONS CLIENTS ASK

Q Do we have to commit to a full implementation?

No. The scope and quotation are yours to act on, with us, another partner or in your own time.

Q What if a step doesn't fit standard Odoo?

It is flagged and priced separately, so you can decide whether to build it or change the process.

Q Will you touch our data?

We review what has to migrate and which systems stay, but nothing changes during discovery.

ERP-03 ODOO CUSTOMISATION

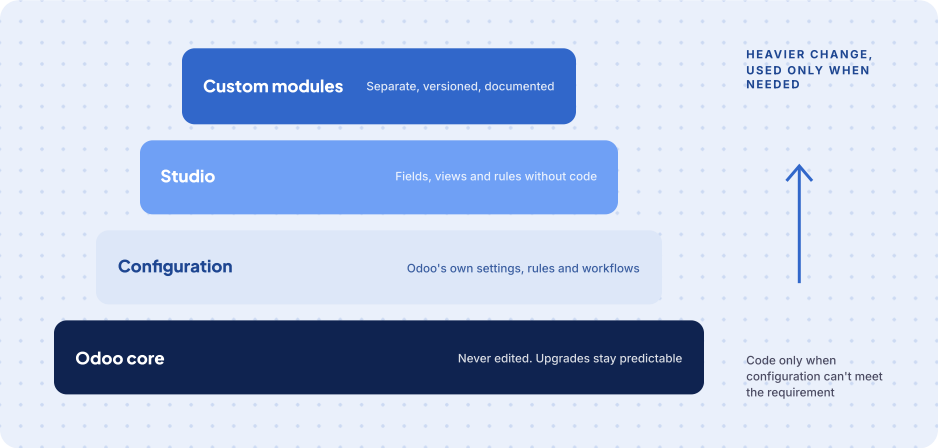
Upgrade-safe customisation.

Tailored modules, workflows, reports and approvals, built so the upgrade path stays predictable. Custom only where it earns its place.

MODEL	BUILT ON	APPROACH
Per module, on quotation	Odoo.sh, version-controlled	Standard first

A SPECIFICATION

BEST FOR	Processes that standard Odoo can't meet without changing how you work
PRINCIPLE	If configuration solves it, we configure. If it needs code, it gets a module
UPGRADES	Customisations are separate modules, so upgrades stay predictable
OWNERSHIP	Code and documentation are handed over with the module
ODOO APPS	Studio · Approvals · Spreadsheet (BI) · Documents



ERP-03 ODOO CUSTOMISATION · CONTINUED

B WHAT'S INCLUDED

- **Configuration first**: settings, rules and Studio before any code
- **Custom modules** that live separately and never edit Odoo's own code
- **Workflows and approvals** shaped to how your team signs things off
- **Reports and documents**: quotations, invoices and dashboards in your format
- **Tested and documented** on staging before anything reaches production
- **Upgrade migration** of your modules when you move to a new Odoo version

C QUESTIONS CLIENTS ASK

Q Will customisation break future upgrades?

Not the way we build it. Modules are tested, documented and never edit Odoo's core.

Q Configuration or customisation?

Configuration uses Odoo's own settings; customisation adds code. We pick the lightest option that meets the requirement.

Q Can you build on Odoo Online?

Odoo Online runs standard apps. Custom modules need Odoo.sh or on-premise, which we plan in discovery.

ERP-04 ODOO INTEGRATION

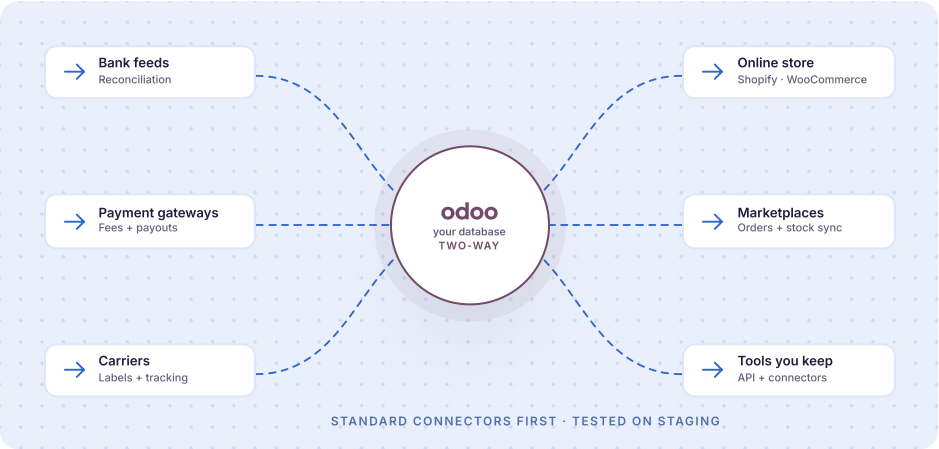
Integrations, connected not replaced.

Bank feeds, payment gateways, online stores, marketplaces, carriers and the tools you keep, joined to Odoo so orders, stock and money stay in step.

MODEL	SYNC	TESTED
Per flow, on quotation	One-way or two-way	On staging, real records

A SPECIFICATION

BEST FOR	Companies keeping tools that work, and wanting one set of numbers
CONNECTORS	Standard connectors from Odoo and its app store first; custom only where none is maintained
DOCUMENTATION	Any custom code we write is documented and handed over
GO-LIVE	Every flow tested on staging with real records first
ODOO APPS	Accounting · eCommerce · Inventory · Sales



ERP-04 ODOO INTEGRATION · CONTINUED

B WHAT'S INCLUDED

- **Bank feeds** for faster reconciliation in Accounting
- **Payment gateways** with fees and payouts captured and reconciled
- **Online stores** such as Shopify or WooCommerce, orders and stock in step both ways
- **Marketplaces and carriers** for orders, fulfilment and labels
- **Field-by-field mapping**: the direction of every flow agreed up front
- **Error alerts** to a person, never a silent failure

C QUESTIONS CLIENTS ASK

Q Will Odoo replace our online store?

Only if you want it to. Otherwise we connect your existing store so orders and stock stay in step.

Q Do you build custom connectors?

Only where no maintained connector exists, and any custom code is documented.

Q What if a sync fails?

Error handling alerts a person rather than failing silently.

ERP-05 ODOO CRM CUSTOMISATION

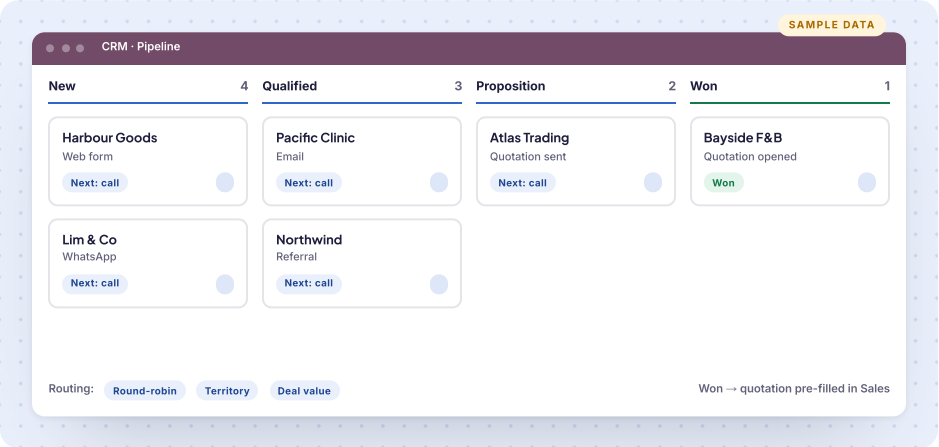
CRM built around how you sell.

Pipelines, lead routing, scoring, quotation hand-off and reporting, matched to your stages and connected to Sales so nothing gets re-keyed.

MODEL	LEAD SOURCES	HANDS OFF TO
Project, on quotation	Web · email · WhatsApp · social	Odoo Sales

A SPECIFICATION

BEST FOR	Sales teams losing leads between inboxes, spreadsheets and quotes
STARTS WITH	A walkthrough of your last ten deals
FLOWS INTO	Sales, Inventory and Accounting on the same record
REPORTING	Pipeline, conversion and activity views your managers use
ODOO APPS	CRM · Sales · WhatsApp · Email Marketing



ERP-05 ODOO CRM CUSTOMISATION · CONTINUED

B WHAT'S INCLUDED

- **Pipeline stages and fields** that mirror your real sales process
- **Lead capture** from website forms, email aliases, WhatsApp and social
- **Routing rules**: round-robin, territory, product or deal value
- **Scheduled activities** so every opportunity has an owner and a next step
- **Quotation hand-off**: a won deal opens a quote with customer, products and pricelist filled in
- **Optional AI** to draft follow-ups and enrich contacts for review

C QUESTIONS CLIENTS ASK

Q Isn't Odoo CRM fine out of the box?

It's a solid pipeline as-is. The value is in matching it to how you sell and connecting it to Sales.

Q How are leads assigned?

By whatever rule fits: round-robin, territory, product or deal value.

Q What happens when a deal is won?

It opens a quotation pre-filled with the customer, products and pricelist.

ERP-06 ODOO TRAINING

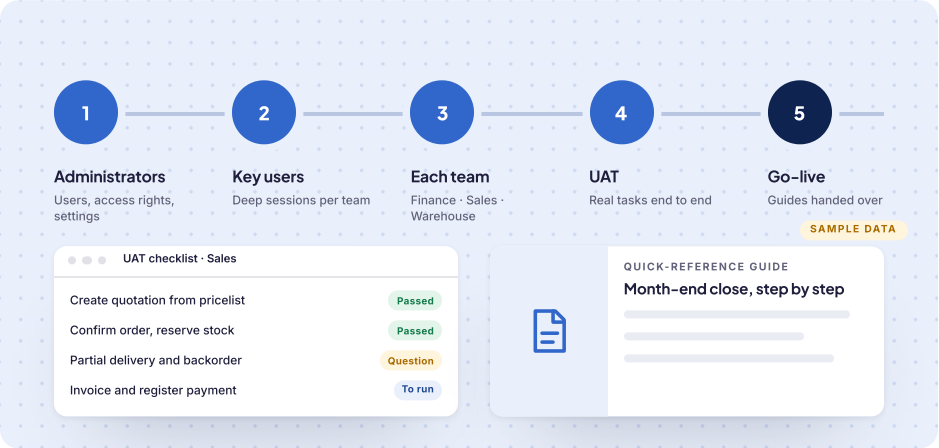
Training on your own data.

Role-based sessions where finance, sales and warehouse teams learn their own screens on a staging copy of your database, with written guides for hand-over.

MODEL	FORMAT	ENVIRONMENT
Per session plan, on quotation	**On-site in Singapore or remote**	**Staging copy**

A SPECIFICATION

BEST FOR	New implementations, new hires and teams after an upgrade
WHERE	A staging copy of your database, not a demo
WHO ATTENDS	Administrators first, then each team for its own screens
HAND-OVER	Guides that let you onboard new staff without us
ODOO APPS	eLearning · Knowledge · Accounting · Inventory



ERP-06 ODOO TRAINING · CONTINUED

B WHAT'S INCLUDED

- **Administrator training** first: users, access rights and settings
- **Team sessions** for each role on its own screens
- **Key-user programme** so your own people can train the rest
- **User acceptance testing (UAT)**: real tasks run end to end before go-live
- **Quick-reference guides** written for your setup
- **Refresher sessions** when the team grows or Odoo changes

C QUESTIONS CLIENTS ASK

Q Demo or our own system?

Your own, on a staging copy, so nothing looks unfamiliar on go-live day.

Q What is UAT?

User acceptance testing: your team runs real tasks end to end before go-live, while there is still time to fix gaps.

Q Can we train new hires later?

Yes. The guides let you onboard without us, and we run refreshers on request.

ERP-07 ODOO SUPPORT & UPGRADES

Support after go-live.

Fixes, month-end help, version upgrades and small changes on a plan that fits your team, including Odoo databases we didn't build.

MODEL	CHANNEL	UPGRADES
Support plan, on quotation	One tracked channel	On your schedule

A SPECIFICATION

BEST FOR	Companies running Odoo who want one team on call
TEAM	Led from Singapore HQ, consultants and developers in Taguig City, AI engineers in Ho Chi Minh City
UPGRADES	Staging test, migrated customisations, never a forced cut-over
PRICED BY	The number of users and apps in use
ODOO APPS	Helpdesk · Project · Accounting · Spreadsheet (BI)

SAMPLE DATA

Helpdesk · Your support plan

TICKET	REQUEST	TYPE	STATUS
#1042	Add approval step to purchase orders	Change	In progress
#1041	Bank feed missing yesterday's lines	Fix	Done
#1039	Month-end: accrual entries	Month-end	Done
#1037	New user for warehouse team	Access	Open

1 channel for requests · 100% requests tracked · 0 forced cut-overs

VERSION UPGRADE PATH

1. Staging copy — Your database, cloned
2. Migrate modules — Your customisations moved
3. Test — Your team checks
4. Upgrade — On the date you choose

ERP-07 ODOO SUPPORT & UPGRADES · CONTINUED

B WHAT'S INCLUDED

- **Tracked tickets**: every request from open to done, nothing lost in an inbox
- **Response targets** agreed in your plan and tracked on every ticket
- **Month-end help**: 2307s, SLSP, SAWT and QAP prepared in Odoo before each filing; your team files
- **Small changes**: fields, reports, rules and access as the business moves
- **Version upgrades** tested on staging with your customisations migrated
- **Takeover reviews** for Odoo set up by someone else

C QUESTIONS CLIENTS ASK

Q Do you support Odoo you didn't build?

Yes. A short review of the current setup comes first, so we know what we are taking on.

Q What are your response times?

Agreed in your plan and kept realistic to your setup, not a headline number.

Q Will an upgrade break our customisations?

We test on staging, migrate them and upgrade on the schedule you choose.

ERP-08 MULTI-COMPANY ERP FOR GROUPS

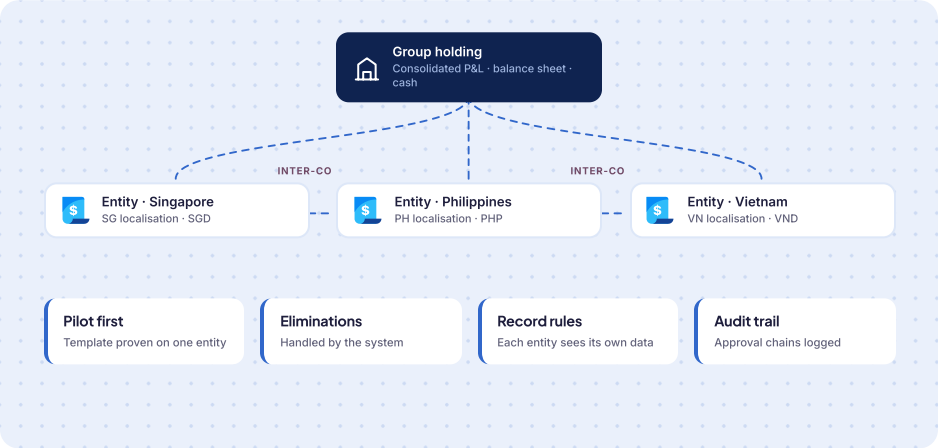
One database for the group.

Multi-company consolidation, inter-company flows, country localisations, governance and a phased rollout, entity by entity.

MODEL	ROLLOUT	HOSTING
Phased, on quotation	Pilot entity, then template	Usually Odoo.sh

A SPECIFICATION

BEST FOR	Groups with several companies or countries
VISIBILITY	People see their company's data and only the group views you grant
DATA	Odoo.sh with staging and version control, or your own cloud where residency requires
PRICED BY	Entities, countries, integrations and custom work
ODOO APPS	Accounting · Invoicing · Approvals · Employees



ERP-08 MULTI-COMPANY ERP FOR GROUPS · CONTINUED

B WHAT'S INCLUDED

- **Pilot entity first**, then the template rolled out company by company
- **Consolidation**: group P&L, balance sheet and cash from the same database
- **Inter-company flows** with eliminations handled by the system
- **Country localisations**: BIR reports in the Philippines, GST in Singapore, each entity on its own rules
- **Governance**: access rights and record rules per entity, approval chains, audit trails
- **Group reporting** rolled up in one currency

C QUESTIONS CLIENTS ASK

Q Do all entities go live at once?

No. Each entity goes live when it is ready, after the pilot.

Q Can each country keep its own tax rules?

Yes. Every entity uses its own localisation while group reports roll up in one currency.

Q Who can see what?

Granular rights and record rules per entity, with approval chains and audit trails.

ODOO APPS WE IMPLEMENT

The full suite, one database.

We implement the full Odoo suite, and our first focus is Accounting, Sales and Inventory. Every app shares the same customers, products and accounts, so adding one later needs no integration project.

FINANCE

Accounting Focus
Journals, bank sync, tax reports, closing

Invoicing
Invoices and online payments

Expenses
Receipts and approved claims

Spreadsheet (BI)
Live pivots and dashboards

Documents
Files with workflows and OCR

Sign
E-signatures with an audit trail

SALES

CRM
Leads, pipeline and activities

Sales Focus
Quotations, orders, upsells

Point of Sale
Offline-ready retail checkout

Restaurant
Tables, kitchen printing, bills

Subscriptions
Recurring billing and renewals

Rental
Book, pick up, return assets

ODOO APPS WE IMPLEMENT · CONTINUED

WEBSITES

Website
Drag-and-drop pages, SEO tools

eCommerce
Store tied to stock and books

Blog
Articles with scheduling

Forum
Community Q&A

eLearning
Courses and certifications

Live Chat
Chat with site visitors

SUPPLY CHAIN

Inventory Focus
Multi-warehouse, barcodes, replenishment

Purchase
RFQs, vendor pricelists, receipts

Manufacturing
Bills of materials, work orders

PLM
Engineering changes, versions

Quality
Control points and alerts

Maintenance
Preventive and corrective

ODOO APPS WE IMPLEMENT · CONTINUED

HUMAN RESOURCES

Employees
Directory, contracts, org chart

Payroll
Salary rules and payslips

Time Off
Leave requests, allocations

Recruitment
Jobs, applicants, interviews

Appraisals
Reviews and goals

Referrals
Employee referral programme

MARKETING

Email Marketing
Campaigns, lists, A/B tests

SMS Marketing
Text campaigns with tracking

Social Marketing
Schedule and track posts

Automation
Multi-step flows on triggers

Events
Registrations, tickets, badges

Surveys
Forms, quizzes, feedback

ODOO APPS WE IMPLEMENT · CONTINUED

SERVICES

Project
Tasks, stages, milestones

Timesheets
Time billed to projects

Field Service
On-site jobs, in Planning from Odoo 20

Planning
Shifts and resources

Helpdesk
Tickets, SLAs, knowledge base

Appointments
Online booking calendars

PRODUCTIVITY

Discuss
Chat, channels, notifications

Knowledge
Wiki pages linked to records

Approvals
Request and approve anything

WhatsApp
Templates and conversations

Phone (VoIP)
Calls from inside Odoo

AI
Assistants and agents in Odoo

Odoo app icons are Odoo S.A. marks, shown in their own colours. Licences are billed by Odoo per user per month; Odoo's One App Free plan covers a single app.

OUR IMPLEMENTATION METHOD

Six steps, one team throughout.

01 Discovery

We map how orders, stock and money move today and match each step to an Odoo app. Output: a written scope.

02 Configuration

Apps set up on a staging copy, never on live data. Standard features first.

03 Data migration

Customers, vendors and products in full; opening balances and open items. The old system stays for history.

04 Training & UAT

Role-based sessions on your own data; your team runs real tasks end to end.

05 Integration

Banks, payments, stores and the tools you keep, tested on staging with real records.

06 Go-live & support

Cut-over on an agreed date, then support, fixes, month-end help and upgrades.

OUR IMPLEMENTATION METHOD · CONTINUED

What we need, and what goes first.

WHAT WE NEED FROM YOU

- A short description of how your process runs today
- A decision-maker for scope questions
- The people who run sales, stock and finance, for discovery and training
- Access to the data you want to bring across

TIMELINE

It depends on the number of apps, companies and integrations, and how clean your data is. The timeline is agreed in the written scope at the end of discovery, and the first phase is kept focused so it goes live sooner.

PHASE 1



Accounting



Sales



Inventory

Where money and stock move. Everything else joins the same database later.

WHERE ODOO RUNS

Hosting is a scoping decision.

We recommend hosting during discovery, based on whether you need custom modules and any data-residency rules, never by default.

	ODOO ONLINE	ODOO.SH	ON-PREMISE / YOUR CLOUD
Best for	Fastest start on standard apps	Custom development with staging and version control	Data residency or existing infrastructure
Our default	Most first phases	When a requirement needs custom code	Only when IT policy or data rules require it
Custom modules	No. Configuration, plus Studio on the Custom plan	Yes, version-controlled	Yes
Hosting cost	Included in the Odoo subscription	Hosting fees on top of the Custom plan	Your own infrastructure and operations
Upgrades	Managed by Odoo	Tested on staging, then scheduled	Planned and run with you

WHERE ODOO RUNS · CONTINUED

	ODOO ONLINE	ODOO.SH	ON-PREMISE / YOUR CLOUD
Environments	Production	Production, staging and development branches	As your infrastructure allows
Typical client	Small teams on standard processes	Growing companies and groups with custom needs	Regulated or infrastructure-led organisations
Move later?	Yes, to Odoo.sh or on-premise, tested on a copy before switching	—	—

Standard first
Configuration, then Studio, then custom modules, the lightest option that meets the requirement.

Upgrade-safe
Custom work is built as separate modules, so version upgrades stay predictable.

Your account
The Odoo subscription and database are in your name. You can export your data at any time.

ODOO LICENCES
Priced per user per month by Odoo, and paid to Odoo. Prices differ by country and currency; see odoo.com/pricing for your market.

IMPLEMENTATION
Quoted by TechNext in writing: configuration, data migration, training and integration, with support options after go-live.

TechNext

03

PRACTICE 03 · ENTERPRISE AI

AI that works on your data.

Knowledge assistants, AI inside Odoo, workflow agents and chatbots, grounded in your own sources, with a person approving anything that moves money, commitments or customer data.

AI-01	RAG Knowledge Assistants	p. 52
AI-02	AI inside Odoo	p. 54
AI-03	AI Workflow Automation	p. 56
AI-04	AI Chatbots	p. 58

ENTERPRISE AI · FOUR DISCIPLINES

Start with the task that removes the most manual hours.

AI-01

RAG knowledge assistants

Answers from your documents, cited

AI-02

AI inside Odoo

Capture, drafting and lookups in the ERP

AI-03

Workflow automation agents

Multi-step work prepared for release

AI-04

AI chatbots

Web, WhatsApp and in-app, with hand-off

Do we have to be on Odoo?

No. Assistants, agents and chatbots work with the tools you already use. AI inside Odoo is for teams running the ERP.

Who builds it?

Our AI engineering hub in Ho Chi Minh City, alongside the Singapore and Taguig City teams on the same project.

How is it priced?

On quotation, scoped to the task and the data involved, with a written scope first.

ENTERPRISE AI · CONTINUED

How our AI stays in control.

Grounded

Answers come from your own sources and cite them. When documents don't cover a question, it says so.

Human-approved

Anything that moves money, commitments or customer data waits for a person.

Logged

Every action is logged against the record it touched, and can be replayed or rolled back.

Scoped

Access is limited to what each task needs; retrieval follows your access rules.

Private

Data stays in your environment; private-cloud or on-premise models where it can't leave.

Measured

Accuracy is checked on your own documents before anything runs unattended.

AI-01 RAG KNOWLEDGE ASSISTANTS

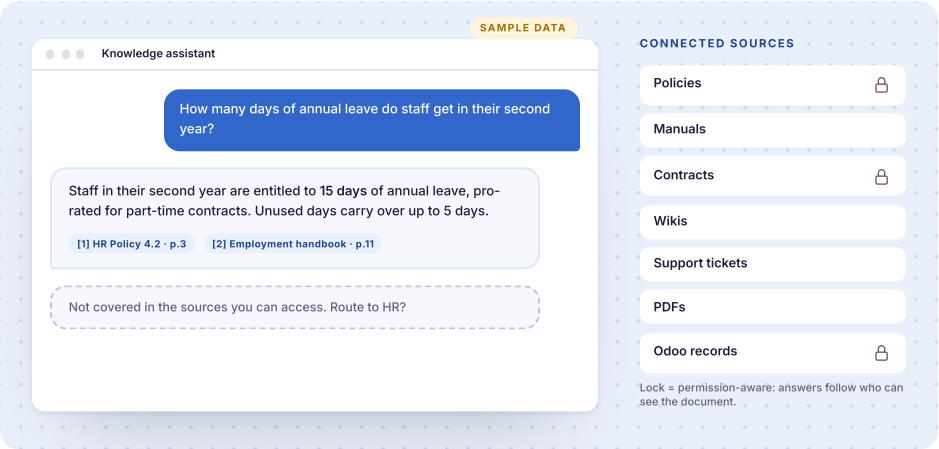
Answers from your documents.

Ask in plain language and get answers from your policies, manuals, contracts and records, with the sources cited and access rules respected.

MODEL	GROUNDING	DATA
Project, on quotation	Your sources, cited	Stays in your tenancy

A SPECIFICATION

BEST FOR	Teams that spend hours finding the right policy, clause or procedure
ACCURACY	Measured on your own documents before go-live
ACCESS	Who can see a document decides who can get an answer from it
NEEDS ODOO?	No. It reads Odoo records when you run it
ODOO APPS	Knowledge · Documents · Discuss · AI



AI-01 RAG KNOWLEDGE ASSISTANTS · CONTINUED

B WHAT'S INCLUDED

- **Source connection**: policies, manuals, contracts, wikis, tickets, PDFs and Odoo records
- **Cited answers** from retrieved passages, never from guesswork
- **Honest gaps**: when the documents don't cover it, it says so
- **Permission-aware retrieval** that follows your existing access rules
- **Where people work**: Odoo Discuss or Knowledge, Teams, Slack, intranet widget or WhatsApp
- **Private deployment**: private-cloud or on-premise models where data can't leave

C QUESTIONS CLIENTS ASK

Q How does it avoid making things up?

It answers only from passages retrieved from your sources and cites them.

Q Could it show a document someone shouldn't see?

No. Retrieval is permission-aware and follows your access rules.

Q Does our data leave our environment?

It stays in your tenancy; private-cloud or on-premise models where required.

AI-02 AI INSIDE ODOO

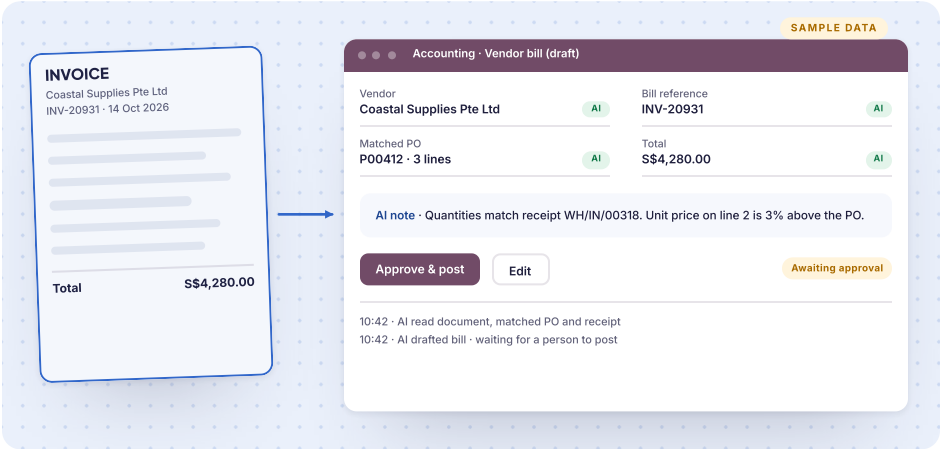
AI working inside your ERP.

Document capture, drafting, lookups and assistants connected to your Odoo data, built by the same team that implements your Odoo.

MODEL	APPROVAL	AUDIT
Per task, on quotation	A person releases each step	Logged on the record

A SPECIFICATION

BEST FOR	Finance and operations teams already running Odoo
CONTROL	Anything that posts, sends money or contacts a customer waits for approval
ACCURACY	Measured on your own documents and records before running unattended
SAME TEAM	We implement the ERP and build the AI that runs inside it
ODOO APPS	AI · Accounting · Documents · Sales



AI-02 AI INSIDE ODOO · CONTINUED

B WHAT'S INCLUDED

- **Document capture**: bills read, matched and drafted as entries
- **Drafting** of follow-ups, quotations and replies for review
- **Lookups** that show their source so people can verify
- **Assistants** inside Odoo for the team's daily questions
- **Scoped access**: only the records each task needs
- **Audit trail**: every action logged against the record it touched

C QUESTIONS CLIENTS ASK

Q Will it post to the ledger on its own?

No. The AI prepares; a person approves anything that posts, pays or contacts a customer.

Q What can it see in Odoo?

Only the records the task needs, scoped up front and logged.

Q Can our data stay in our environment?

Yes, with on-premise or private-cloud models where data can't leave.

AI-03 AI WORKFLOW AUTOMATION

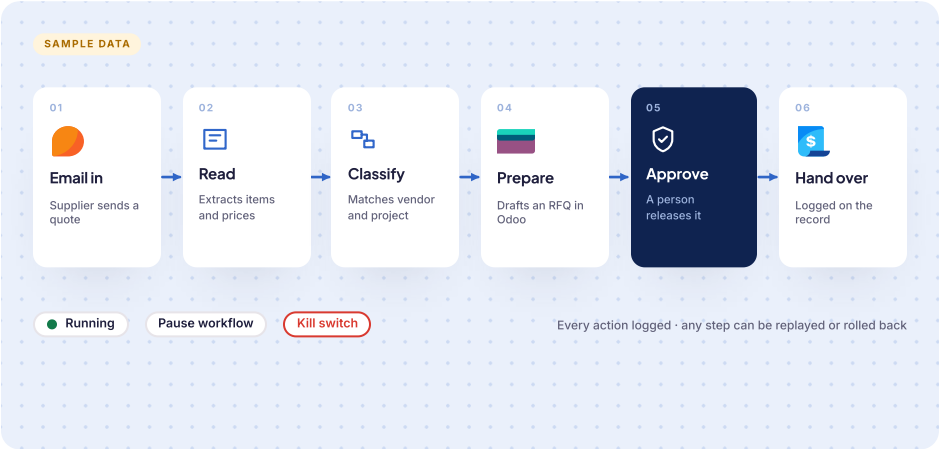
Agents that prepare the work.

Agents that read, classify, prepare and hand over across email, documents, Odoo and your tools, with approval where money moves.

MODEL	CONTROL	NEEDS ODOO?
Per workflow, on quotation	Pause and kill switch	No

A SPECIFICATION

BEST FOR	Repetitive, rules-heavy work that eats hours every week
START WITH	The task that removes the most manual hours each week
CONNECTS VIA	APIs and connectors, in one run
WITH ODOO	Reads and prepares records inside the ERP
ODOO APPS	Discuss · Documents · Accounting · Purchase



AI-03 AI WORKFLOW AUTOMATION · CONTINUED

B WHAT'S INCLUDED

- **Multi-step runs** across email, documents, spreadsheets, Odoo and other systems
- **Read and classify** incoming work, then prepare the next step
- **Human release** for anything irreversible: a payment, a posting, a message
- **Full log** of every action; any step can be replayed or rolled back
- **Pause per workflow** and a kill switch
- **Scoped access**: the agent only sees what its task needs

C QUESTIONS CLIENTS ASK

Q Will it act without us?

No. Anything irreversible waits for a person. The agent prepares; you release.

Q How do we know what it did?

Every action is logged against the record, and steps can be replayed or rolled back.

Q Can we stop it quickly?

Yes. There's a pause per workflow and a kill switch.

AI-04 AI CHATBOTS

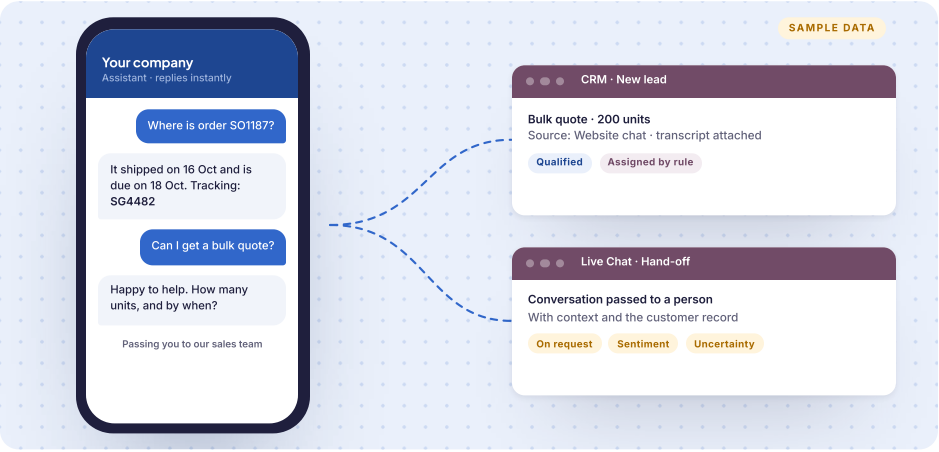
Chatbots for web, WhatsApp and Odoo.

Answers from your approved content, lead qualification, order lookups and a clean hand-off to your team, on every channel you run.

MODEL	CHANNELS	HAND-OFF
Per channel, on quotation	Web · WhatsApp · in-app	Live Chat or WhatsApp

A SPECIFICATION

BEST FOR	Teams answering the same questions all day
SAFETY	Answers only from approved content; anything binding waits for a person
HAND-OFF	Conversation, context and customer record passed to your team
CONTENT	One source maintained, many languages served
ODOO APPS	Live Chat · WhatsApp · CRM · Helpdesk



AI-04 AI CHATBOTS · CONTINUED

B WHAT'S INCLUDED

- **Website widget** styled to your brand
- **WhatsApp** through the Business API
- **Lead capture**: qualifying questions, a CRM lead and the full transcript
- **Order lookups** that read prices and dates from your records
- **Hand-off** with context on request, sentiment or uncertainty
- **Multilingual**: answers in the customer's language from one source

C QUESTIONS CLIENTS ASK

Q Will it promise something it can't deliver?

No. It answers from approved content and reads prices and dates from your records.

Q Can it hand over to a real person?

Yes, with the conversation, context and customer record.

Q Does it capture leads?

It qualifies, then creates the CRM lead with the transcript attached.

04

PRACTICE 04 · WEBSITES & MARKETING

Websites, social and brand.

Company websites, social media management and brand assets, designed, produced and handed over in your name. Each service works on its own.

MKT-01	Web Design & Development	p. 61
MKT-02	Social Media Management	p. 63
MKT-03	Graphic Design & Brand Assets	p. 65

MKT-01 WEB DESIGN & DEVELOPMENT

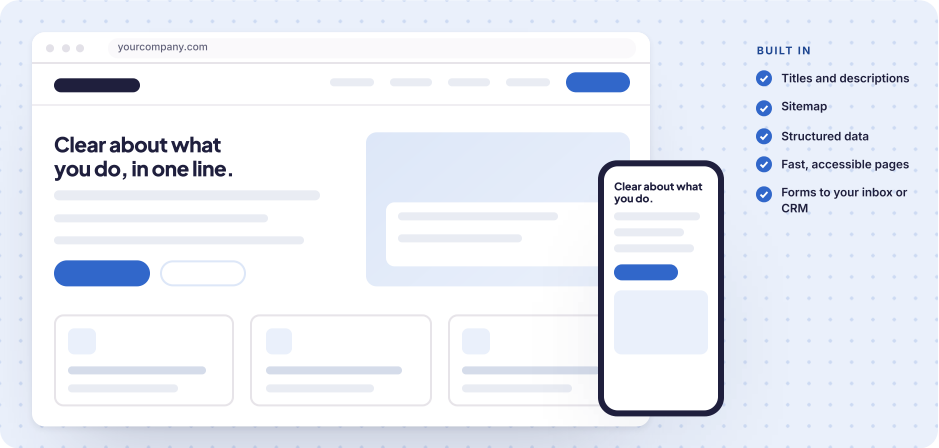
Websites that explain what you do.

Fast, clear company websites, landing pages and online stores, designed, built and handed over with forms that reach your team.

MODEL	OWNERSHIP	EDITING
One-off, on quotation	Domain and site in your name	Your team can update it

A SPECIFICATION

BEST FOR	Companies whose site no longer matches the business
HOSTING	Your own account, or one we set up for you, in your name
APPROVAL	Every page shared for your sign-off before it goes live
BEYOND BASICS	Ongoing SEO or content campaigns are a separate scope
ODOO APPS	Website · eCommerce · Blog · CRM



MKT-01 WEB DESIGN & DEVELOPMENT · CONTINUED

B WHAT'S INCLUDED

- **Design and build** of company sites, landing pages and online stores
- **Redesigns**: we tell you what to keep from the current site
- **SEO basics** built in: titles, descriptions, sitemap, structured data
- **Fast, accessible pages** on every screen size
- **Forms** that go straight to the inbox or CRM you name
- **Hand-over notes** and a short walkthrough for everyday changes

C QUESTIONS CLIENTS ASK

Q Can we edit the site ourselves afterwards?

Yes. We build on platforms your team can update and hand over notes and a walkthrough.

Q Who owns the site?

You do. The domain, the site and the accounts stay in your name.

Q Can you redesign our existing site?

Yes. Send the current site or a blank page; either is a fine start.

MKT-02 SOCIAL MEDIA MANAGEMENT

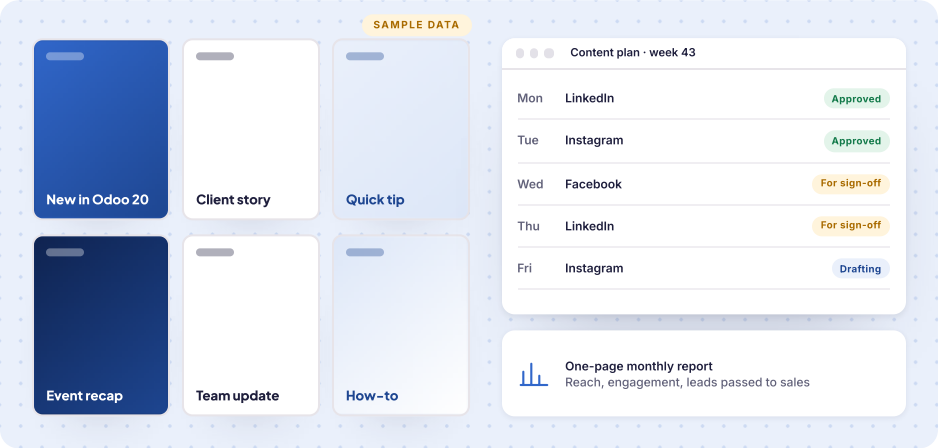
Steady posting with a plan behind it.

We run your LinkedIn, Facebook and Instagram on a monthly plan: content, scheduling, replies and a one-page report, while you run the business.

MODEL	CHANNELS	REPORT
Monthly retainer	LinkedIn · Facebook · Instagram	One page, monthly

A SPECIFICATION

BEST FOR	Businesses that know they should post but never have the time
CHANNEL MIX	We recommend; you decide which to run
OWNERSHIP	Accounts stay in your name; we hold only the access needed
PRICED BY	Channels and volume
ODOO APPS	Social Marketing · Email Marketing · CRM



MKT-02 SOCIAL MEDIA MANAGEMENT · CONTINUED

B WHAT'S INCLUDED

- **Monthly content plan** agreed with you
- **Design, copy and short video** produced in your branding
- **Your sign-off** on every post before it is scheduled
- **Scheduling and publishing** on the channels you choose
- **Comments and messages** checked on working days; leads passed to your sales contact
- **One-page monthly report**

C QUESTIONS CLIENTS ASK

Q Do we approve posts?

Yes. Every post is shared for your sign-off before it is scheduled or published.

Q Do you write captions and make graphics?

Yes. Design, copy and short video are all part of the service.

Q What about comments and messages?

We respond on working days and pass leads to your sales contact.

MKT-03 GRAPHIC DESIGN & BRAND ASSETS

Brand assets you own.

Logo refresh, guidelines, sales decks, brochures, social and document templates, delivered as editable files your team can keep using.

MODEL	FILES	TOOLS
One-off, on quotation	Editable masters + PDF	PowerPoint · Canva · Figma · InDesign

A SPECIFICATION

BEST FOR	Companies whose materials look different every time
HAND-OVER	Masters plus PDFs; licensed fonts noted at hand-over
OWNERSHIP	You own everything delivered
PRICED	Per scope, as a one-off, quoted before work begins



MKT-03 GRAPHIC DESIGN & BRAND ASSETS · CONTINUED

B WHAT'S INCLUDED

- **Logo refresh** that keeps what works, or a new mark when it's needed
- **Brand guidelines**: logo use, colour, type and tone
- **Sales decks and brochures**
- **Social templates** for posts and covers
- **Document templates**: letterhead, proposals, quotations
- **Editable master files** in the tools your team already uses

C QUESTIONS CLIENTS ASK

Q Editable files or just PDFs?

Editable masters. PDFs are for sharing; the source files are yours.

Q Can you refresh our logo instead of replacing it?

Yes. A refresh is often right, and we'll say so if it is.

Q Can our team make new assets afterwards?

That's the point of the templates and the guideline.

WEBSITE DESIGN WITH YOUR ODOO

We design your website on Odoo. One system with your sales.

Our designers build a full multi-page website around your brand and set it up in your Odoo. It runs on your own Odoo subscription, ready for more apps, with the scope, timeline and quotation agreed with you in writing before we start.

WHAT WE DESIGN AND SET UP

- Custom multi-page website design, styled to your brand
- Your choice of look, colours and layout, with rounds of changes
- Setting up the Website app in your Odoo database
- Contact form, mobile layout and basic SEO
- One hand-over call to show your team how to edit it

ALSO TO PLAN FOR

- Your Odoo subscription, paid to Odoo at Odoo's price
- More Odoo apps (CRM, invoicing, inventory, HR) if you add them
- Your domain name, if you don't have one yet
- Extra pages, an online shop or support, only if you ask

Our design work and every other cost are quoted in writing before we start.

WEBSITE DESIGN WITH YOUR ODOO · CONTINUED

How it runs, step by step.

STEP 1

Tell us

Send the form. We reply within one working day, book a 20-minute call about your business and the style you like, then send a written quotation.

STEP 2

We build it

On a timeline agreed with you before we start, we design your website in your Odoo. You review it.

WHEN YOU'RE READY

Grow on the same system

Add CRM, invoicing or inventory later. No moving data, no second system.

Who owns the website and the data?

You do. The Odoo subscription and database are in your name, and you can export your data or move to another partner at any time.

I need an online shop or a special feature.

Tell us in the form. Online shops, bookings or custom features are scoped in the same written quotation.

Ask for a quotation at technext.asia/quotation. Odoo itself is not free; your website runs on your own Odoo subscription, which you pay to Odoo.

ODOO BY INDUSTRY

Built around how your sector works.

Four pages per sector: the apps we switch on, the modules inside, how the work flows, and how we roll it out.



01 **Retail** 70
Point of Sale, shared stock across stores, promotions and daily takings posted to Accounting.



02 **Food & beverage** 74
Restaurant POS with kitchen display, recipes and food cost, central kitchen, purchasing and books per outlet.



03 **Manufacturing** 78
Bills of materials, work orders, component stock, purchasing and product costing in one database.



04 **Ecommerce** 82
Web and marketplace orders, fulfilment tied to real stock, payouts reconciled in Accounting.



05 **Construction** 86
Job costing per project, subcontractor claims, retention and progress invoicing.



06 **Clinics & healthcare** 90
Consumables stock per branch, central purchasing and clean accounts per entity.



07 **Travel & tours** 94
Quotations, supplier costs and margin per booking, multi-currency invoicing.



08 **Health & wellness** 98
Online booking, memberships and packages, retail POS and stock, and clean books.

INDUSTRY 01 RETAIL

Tills, stock and accounts that agree.

Point of Sale that works offline, stock shared across stores and online, and daily takings posted to Accounting without a spreadsheet in between.

ODOO APPS WE SWITCH ON

Point of Sale · Inventory + Barcode · Purchase · eCommerce · Accounting

FIRST PHASE · START WITH ONE STORE

With one store: products, POS, stock and accounting go live first, then the same setup rolls out store by store.

A WHAT USUALLY SLOWS YOU DOWN

Separate POS, separate stock

The till knows what sold; the stock system finds out later, if at all.

Transfers by message

Stores move stock between each other on WhatsApp; counts drift.

Takings keyed in daily

Z-reports typed into accounting each evening; card settlements reconciled by hand.

CONNECTS TO

Card terminals supported by Odoo POS · Bank feeds for card settlements · Receipt printers and barcode scanners · Loyalty, gift cards and eWallets · Multi-store and multi-company

INDUSTRY 01 RETAIL · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

Point of Sale
The till at every counter

Core module

- Offline selling that syncs when the connection returns
- Loyalty, gift cards, eWallets, coupons and promotions set once for every store
- Barcode scanners, receipt printers and Odoo-supported card terminals
- Odoo 20: several currencies at one checkout; snooze an item off the till

Inventory + Barcode
One stock picture per store

- Each store its own warehouse, with live stock
- Receipts scanned in; bills matched to what arrived
- Transfers between stores both sides can see; cycle counts
- Odoo 20: stock aging report

Purchase
Suppliers ordered from stock rules

- Reordering rules per store raise purchase orders
- Vendor pricelists and lead times
- Odoo 20: suggested min and max levels from demand history

eCommerce
The same stock online

- Shared catalogue, prices and live stock
- Store-pickup orders reserve items at the chosen store
- Loyalty and gift cards online as well as at the till

Accounting
Takings in the books the same day

- Closing a POS session posts sales, taxes and payment methods
- Card settlements matched from the bank feed
- Stock valuation per location

REPORTS WE SET UP FIRST POS sales by store, product and hour · Margin by product and category · Stock valuation per location · Best and slowest sellers

INDUSTRY 01 RETAIL · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 Purchase

Ordered from stock rules

Minimum-stock rules raise purchase orders with the vendor's price and lead time.

Replaces: A weekly stock walk

2 Inventory

Scanned in, stock live

Receipts scanned with a barcode device; the vendor bill matched to what arrived.

Replaces: Delivery notes filed

3 Inventory

Transfers between stores

The transfer shows in both stores until it is received.

Replaces: Messages between managers

4 Point of Sale

Sell at the till, even offline

Barcodes, promotions, loyalty and gift cards at the till; every sale moves stock.

Replaces: A standalone till

5 eCommerce

The same stock online

The web shop sells the same products with live stock and store pickup.

Replaces: A separate web shop

6 Accounting

Takings posted

Session close posts to Accounting; card settlements matched from the bank feed.

Replaces: Z-reports typed nightly

Q Can we run loyalty and promotions?

Yes. Loyalty programs, gift cards, eWallets, coupons and promotions are set up once and apply at every till.

Q Does Odoo Point of Sale work offline?

Yes. It keeps selling through internet outages and syncs orders when the connection returns. Card payments depend on your terminal's own connection.

INDUSTRY 01 RETAIL · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Daily takings	Z-report typed into accounting each evening	POS session closes to a journal entry
Stock on hand	Counted per store, merged in a spreadsheet	Live per store and online
Reordering	Buyer walks the shelves and emails suppliers	Reordering rules raise purchase orders
Store transfers	Arranged by message, counts drift	Transfer documents both stores can see
Promotions	Set up separately on each till	One loyalty and promotion setup for every store
Card settlements	Ticked off against bank statements	Matched from the bank feed

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1
One store live
- ✓ Products, barcodes and prices loaded
- ✓ POS, payment terminals and receipts set up
- ✓ Sessions closing to Accounting

PHASE 2
Purchasing and more stores
- ✓ Reordering rules and vendor pricelists
- ✓ Transfers and cycle counts between stores
- ✓ Next stores rolled out on the same setup

PHASE 3
Online and loyalty
- ✓ Online store on the same stock, with store pickup
- ✓ Loyalty, gift cards and promotions everywhere
- ✓ Dashboards by store, category and hour

Q Do daily takings post to accounting automatically?

Yes. Closing a POS session posts sales, taxes and payment methods, and card settlements reconcile from the bank feed.

INDUSTRY 02 FOOD & BEVERAGE

From the order to the kitchen to the books.

Point of Sale that talks to the kitchen, recipes that deplete stock as dishes sell, purchasing on par levels, and each outlet's takings posted the same night.

ODOO APPS WE SWITCH ON

POS Restaurant · Manufacturing · Inventory · Purchase · Accounting

FIRST PHASE · START WITH ONE OUTLET

One outlet goes live first. The same setup then rolls out outlet by outlet, with a consolidated view of takings and food cost.

A WHAT USUALLY SLOWS YOU DOWN

Food cost is a guess

Recipes live in someone's head; ingredient prices move and nobody sees the margin per dish.

Stock counted by feel

Walk-in fridges checked by eye; orders placed by habit; waste unrecorded.

Outlets close in spreadsheets

Each outlet's Z-report and delivery-platform payouts reconciled by hand, days later.

CONNECTS TO

GrabFood orders and menu sync (SG, PH, VN)

Kitchen printers and displays

Card terminals supported by Odoo POS

Self-order receipts by WhatsApp or SMS

Online table bookings

INDUSTRY 02 FOOD & BEVERAGE · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

POS Restaurant
Tables, takeaway and self-ordering

Core module

- Floor plans, split bills and tips
- Self-ordering by kiosk or table QR code; GrabFood orders where supported
- Kitchen display and preparation printers per station, with guest notes
- Odoo 20: order-specific QR to pay after the meal; snooze a dish

Manufacturing
Recipes and the central kitchen

- Recipes (bills of materials) for dishes and prep items
- Selling a dish deducts its ingredients
- Central-kitchen batches of sauces and doughs as manufacturing orders

Inventory
Perishables and par levels

- Stock per outlet and central kitchen
- Transfers of prepared items and dry goods to each outlet
- Usage recorded through recipes, not guessed

Purchase
Suppliers and deliveries

- Reordering rules raise orders from par levels
- Supplier pricelists and delivery days
- Bills matched to what was delivered

Accounting
Outlet takings and payouts

- Each POS session posts sales, taxes and payments per outlet
- Food cost from recipe usage against sales
- Consolidated P&L across outlets

REPORTS WE SET UP FIRST

Sales by outlet, dish and hour

Food cost per dish from recipes

Top and slowest dishes

Payment methods and tips per session

INDUSTRY 02 FOOD & BEVERAGE · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 Purchase

Ordered from par levels

Reordering rules at each outlet raise orders with supplier prices and delivery days.

Replaces: Daily orders by phone

2 Manufacturing

Central kitchen batches

Prep items run as manufacturing orders, so ingredient use and cost are recorded.

Replaces: Prep sheets on paper

3 Inventory

Outlets replenished

Transfers move prepared items to each outlet; stock updates on receipt.

Replaces: Delivery lists and calls

4 Point of Sale

Tables and self-ordering

Floor plans, split bills, tips; kiosk or QR orders go straight to the kitchen.

Replaces: Handwritten tickets

5 Point of Sale

Kitchen display

Orders show at the right station; each dish deducts its recipe.

Replaces: Shouted orders, lost tickets

6 Accounting

Takings and food cost

Each session posts per outlet; food cost from recipe usage.

Replaces: Z-reports keyed by hand

Q Can guests order from their table?

Yes. Self-ordering by kiosk or QR code, and Odoo 20 adds order-specific QR codes so guests can pay after the meal.

Q Does Odoo handle recipes and food cost?

Yes. As dishes sell or prep items are produced, ingredients are deducted from stock and cost is recorded, so food cost per dish is visible.

INDUSTRY 02 FOOD & BEVERAGE · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Orders to the kitchen	Paper tickets or a separate app	Sent from the POS to the kitchen display
Delivery platforms	A tablet per platform, orders re-keyed	GrabFood orders arrive in the POS
Ingredient stock	Counted weekly, usage guessed	Deducted through recipes as dishes sell
Supplier orders	Messaged daily from memory	Raised from par levels per outlet
Food cost	Worked out at month-end, if at all	Visible per dish and per outlet
Outlet takings	Z-reports typed into accounting	POS sessions post to the books

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1

One outlet live

- ✓ Menu, floor plan, printers and kitchen display
- ✓ Payment terminals and sessions closing to Accounting
- ✓ Staff trained on orders, splits and refunds

PHASE 2

Recipes and purchasing

- ✓ Recipes for dishes and prep items
- ✓ Par levels and supplier pricelists per outlet
- ✓ Central kitchen batches and transfers

PHASE 3

More outlets and channels

- ✓ Self-ordering by kiosk or QR code
- ✓ Delivery platform orders into the POS where supported
- ✓ Outlet roll-out with a consolidated P&L

Q Can Odoo take GrabFood orders?

Odoo's release notes list a GrabFood integration for orders and menu sync in SG, PH and VN. TechNext confirms it for your outlets in discovery.

INDUSTRY 03 MANUFACTURING

Know what it costs to make, before you quote it.

Bills of materials drive component demand, work orders track the floor, and every finished unit carries its real cost into stock and the ledger.

ODOO APPS WE SWITCH ON

Manufacturing Inventory Purchase Quality Accounting

FIRST PHASE · SEND US ONE PRODUCT'S BILL OF MATERIALS

With one product family: its bill of materials, operations and components. Once it runs end to end, the rest follows.

A WHAT USUALLY SLOWS YOU DOWN

BoMs in spreadsheets

Component lists live in Excel; when a price changes, the product cost doesn't.

Shortages found on the floor

Production stops because a component ran out that nobody knew was low.

Cost per unit unknown

Labour, materials and overhead never meet in one place; margin per product is estimated.

CONNECTS TO

Barcode scanners and shop-floor tablets

IoT devices: scales, measuring tools, printers

Subcontractors through subcontracting routes

Drawings and specifications in PLM

Multi-company for group entities

INDUSTRY 03 MANUFACTURING · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

Manufacturing
BoMs, routings and work orders

Core module

- Multi-level bills of materials, kits and by-products
- Shop Floor app on a tablet: instructions, barcodes, time
- Work centres, capacity planning and the Master Production Schedule
- Odoo 20: continuous production; split an ongoing order

Inventory
Components, finished goods, lots

- Make-to-order and make-to-stock routes
- Lot and serial numbers traced supplier to customer
- Subcontracting routes

Purchase
Components bought on time

- Reordering rules, or buy straight from the manufacturing order
- Vendor lead times drive order dates
- Odoo 20: each vendor's quality rate

Quality
Checks in the flow

- Control points at receipt, during operations or before delivery
- Worksheets for operators
- Failed checks raise quality alerts

Accounting
Product costing and margin

- Component, work-centre and extra costs roll up per order
- Stock valuation posts automatically
- Actual cost per manufacturing order

REPORTS WE SET UP FIRST

- Production analysis by work centre and product
- OEE per work centre
- Cost analysis per manufacturing order
- Quality alerts and check results

INDUSTRY 03 MANUFACTURING · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 Sales

Sales order in

Reserves stock or triggers production: make to order or make to stock.

Replaces: Orders walked to production

2 Manufacturing

Planned on capacity

Orders scheduled on work-centre capacity; MPS plans from forecasts.

Replaces: A whiteboard

3 Purchase

Components on time

Missing components raise purchase orders using vendor lead times.

Replaces: Shortages on the day

4 Shop Floor

The floor, on a tablet

Operators follow work orders, scan quantities and log time.

Replaces: Paper travellers

5 Quality

Checks in the flow

Control points trigger checks; failures raise alerts.

Replaces: Clipboards filed later

6 Accounting

Real cost per order

Costs roll up per order; valuation posts to Accounting.

Replaces: Yearly standard costs

Q Can operators use Odoo on the shop floor?

Yes. The Shop Floor app runs on a tablet at each work centre for instructions, barcodes and time.

Q Can Odoo trace lots and serial numbers?

Yes. From receipt through production to delivery, and the traceability report shows where each one went.

INDUSTRY 03 MANUFACTURING · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Production plan	Whiteboard updated by the planner	Work orders scheduled on work-centre capacity
Material shortages	Found when the line stops	Visible before the order starts, purchases raised
Shop floor records	Paper travellers typed in later	Quantities and time recorded at the work centre
Traceability	Searching through batch sheets	Lots and serials traced from supplier to customer
Quality checks	Clipboards filed in a drawer	Control points on receipts, operations and deliveries
Product cost	Estimated once a year	Actual cost per manufacturing order

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1

Materials and production

- ✓ Bills of materials, operations and work centres
- ✓ Reordering rules and vendor lead times
- ✓ Opening stock counted in, with lots or serials

PHASE 2

Shop floor and quality

- ✓ Shop Floor tablets at each work centre
- ✓ Quality control points and worksheets
- ✓ Preventive maintenance for key equipment

PHASE 3

Costing and planning

- ✓ Actual costing and stock valuation
- ✓ Master Production Schedule from forecasts
- ✓ Engineering changes managed in PLM

INDUSTRY 04 ECOMMERCE

Orders in, stock out, payouts reconciled.

Whether orders come from your own store or a marketplace, they reserve real stock, print the right labels and land in the books with fees and payouts matched.

ODOO APPS WE SWITCH ON

eCommerce · Inventory + Barcode · Purchase · Helpdesk · Accounting

FIRST PHASE · TELL US WHERE ORDERS COME FROM TODAY

With where orders come from today: each channel, how stock is shared between them and how payouts reach the bank.

A WHAT USUALLY SLOWS YOU DOWN

Overselling

Stock shown online doesn't match the shelf; orders get cancelled after payment.

Picking from printouts

Orders exported to a sheet, picked by memory, tracking numbers pasted back by hand.

Payouts that don't add up

Payouts arrive net of fees; sales, fees and refunds reconciled line by line.

CONNECTS TO

Lazada and TikTok marketplace connectors · Carrier integrations for labels and tracking · Payment providers and bank feeds · Live chat on the store · Several websites and languages

INDUSTRY 04 ECOMMERCE · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

eCommerce
Your own store, or a connector to it

Core module

- Catalogue, variants, pricelists and promotions with live stock
- Payment providers recorded against each order
- Lazada and TikTok marketplace orders into the same place
- Odoo 20: loyalty progress in the cart; minimum order quantity; AI SEO help

Inventory + Barcode
Pick, pack, ship and return

- Orders reserve stock; barcode picking lists
- Carrier labels and tracking from the delivery order
- Odoo 20: simpler returns from the delivery

Purchase
Restock from demand

- Reordering rules raise purchase orders before items run out
- Odoo 20: suggested min and max levels from sales history

Helpdesk
Questions, returns and refunds

- Customer emails become tickets
- Returns linked to the original delivery
- Refunds posted to Accounting

Accounting
Payouts and fees reconciled

- Gateway and marketplace payouts matched to orders
- Fees captured, not netted away
- Margin by channel after cost of goods

REPORTS WE SET UP FIRST

Sales by channel, product and country

Margin by product after cost of goods

Orders waiting to ship, by carrier

Returns by product and reason

INDUSTRY 04 ECOMMERCE · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 eCommerce

Orders from every channel

The store and Lazada and TikTok orders arrive in one place.

Replaces: Exports from each channel

2 Payments

Payment captured

Recorded against the order; payouts reconciled in Accounting.

Replaces: Payouts matched by hand

3 Inventory

Pick, pack and ship

Barcode picking lists; labels from the carrier integration.

Replaces: Copying addresses

4 Purchase

Restock from demand

Suggested min and max levels raise orders before stock-outs.

Replaces: Stock-outs found by customers

5 Helpdesk

Returns and support

Emails become tickets; returns from the delivery; refunds posted.

Replaces: Returns in an inbox

6 Dashboards

Sales by channel

Sales and cost of goods by channel and product.

Replaces: A monthly export sheet

Q Can Odoo stop overselling across channels?

Yes. Website and marketplace orders draw on the same stock, synchronised back to the marketplaces.

Q Can we move our existing store to Odoo?

Yes. Products, customers and order history can be migrated, and TechNext plans redirects so the store keeps its search rankings.

INDUSTRY 04 ECOMMERCE · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Marketplace orders	Downloaded and re-keyed	Fetched from Lazada and TikTok into Odoo
Stock across channels	Updated by hand, items oversold	One stock level synchronised to channels
Shipping labels	Copied into carrier websites	Printed from the delivery order
Reordering	Noticed when an item sells out	Suggested min and max levels from demand
Returns	Emails and a spreadsheet	A return on the delivery, refund in Accounting
Payouts	Matched manually	Reconciled against orders

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1
Store, stock and payments
- ✓ Catalogue, variants and pricelists
- ✓ Payment providers and reconciliation
- ✓ Pick, pack and ship with carrier labels

PHASE 2
Marketplaces
- ✓ Lazada and TikTok connectors
- ✓ One stock level across every channel
- ✓ Reordering from demand history

PHASE 3
Service and growth
- ✓ Helpdesk for support and returns
- ✓ Email campaigns and abandoned-cart follow-up
- ✓ Margin by channel and product

INDUSTRY 05 CONSTRUCTION

Every job's margin, while it is still running.

Purchase orders, subcontractor claims, site materials and labour hours land on the project they belong to, so margin is visible before hand-over.

ODOO APPS WE SWITCH ON

Project · Purchase · Accounting + Sales · Timesheets + Planning · Documents + Sign

FIRST PHASE · BRING ONE LIVE PROJECT

With one live project: its budget, purchases, timesheets and first progress claim, run end to end before the next jobs move over.

A WHAT USUALLY SLOWS YOU DOWN

Costs found at the end

Subcontractor claims and site purchases sit in email until the project closes; the margin is a surprise.

Progress billing by spreadsheet

Certified percentages, retention and variations tracked in Excel, invoices typed from it.

Materials nobody tracks

Deliveries straight to site, no receipt against the order, stock written off at year end.

CONNECTS TO

Bank feeds · Documents and e-signatures · Map view of crews and sites · Mobile timesheets with site photos · Multi-company for group entities

INDUSTRY 05 CONSTRUCTION · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

Project
Job costing per contract

Core module

- Each job a project with stages, tasks and an analytic budget
- Odoo 20: project roles; customer portal access
- Project overview: budget, cost to date and margin

Purchase
Subcontractors and site materials

- Materials, plant hire and subcontracts coded to the job
- Bills matched to what was delivered

Accounting + Sales
Progress billing and job P&L

- Tender in CRM; the accepted quote becomes the contract value
- Milestone invoicing for progress claims; variations as new lines
- Bank feeds and reconciliation

Timesheets + Planning
Labour and crews

- Site hours logged on phones against tasks
- Crews scheduled in Planning, with a live map
- Odoo 20: offline mode on site

Documents + Sign
Drawings and contracts on the job

- Drawings, variations and contracts stored on the project
- Subcontracts and hand-over forms signed online

REPORTS WE SET UP FIRST

- Project overview: budget, cost to date, margin
- Timesheets by job, task and employee
- Purchases and subcontractor bills by job
- Milestones invoiced and still to bill

INDUSTRY 05 CONSTRUCTION · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 CRM + Sales

Tender to contract

Opportunities track tenders; the accepted quote holds the milestones.

Replaces: Tender files in folders

2 Project

Each job a project

Stages, tasks and an analytic budget per job.

Replaces: A spreadsheet per job

3 Purchase

Materials, subcontractors

Orders coded to the job; bills matched to delivery.

Replaces: Month-end allocation

4 Planning

Crews and site work

Crews scheduled with a live map; offline on site in Odoo 20.

Replaces: Group chats

5 Timesheets

Hours and progress

Labour logged against tasks; photos and notes for the office.

Replaces: Weekly paper timesheets

6 Accounting

Claims and job P&L

Milestones invoiced as reached; budget, cost and margin per job.

Replaces: Claims built in Excel

Q Can site teams work without a signal?

Odoo 20 adds an offline mode for creating and editing records, with field work in the Planning app.

Q Can Odoo do job costing for construction?

Yes. Each job runs as a project with an analytic account, so purchases, subcontractor bills and timesheets land against it.

INDUSTRY 05 CONSTRUCTION · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Job cost	Pieced together at month-end	Live per job: materials, labour, subcontractors
Progress claims	Built in a spreadsheet each month	Milestones invoiced from the contract
Site timesheets	Paper sheets collected weekly	Logged on phones against tasks
Purchase orders	Emailed with no job reference	Coded to the job, bills matched to delivery
Drawings and contracts	Spread across shared drives	Attached to the project, signed in Sign
Crew schedule	A group chat and a whiteboard	Planned in Planning, visible on a map

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1

Jobs and job costing

- A project template with stages and budget
- Purchases and bills coded to each job
- Job P&L in the project overview

PHASE 2

Site and billing

- Crew planning and site timesheets on phones
- Milestone and progress invoicing
- Photos and site notes on tasks

PHASE 3

Documents and portfolio

- Drawings, variations and contracts in Documents
- Subcontracts and variations signed in Sign
- A portfolio dashboard across all jobs

Q Does Odoo support progress billing?

Yes. Sales orders invoice by milestone, so progress claims follow the contract, and variations are added as new lines or quotations.

INDUSTRY 06 CLINICS & HEALTHCARE

Stock, purchasing and books, per branch.

Consumables and medicines tracked by lot and expiry, purchasing centralised, and each clinic's accounts kept clean. Clinical records stay in your EMR.

ODOO APPS WE SWITCH ON

Inventory · Purchase · Appointments + Planning · Point of Sale · Invoicing + Accounting

FIRST PHASE · BRING ONE BRANCH'S NUMBERS

With the business side of the clinic: appointments, rosters, stock, purchasing, billing and accounting.

A WHAT USUALLY SLOWS YOU DOWN

Stock nobody trusts

Consumables counted by hand, expiries missed, each branch ordering on its own.

Supplier bills out of step

Deliveries received, bills arriving later, nobody sure what's been paid for.

Month-end by spreadsheet

Branch figures consolidated manually; management sees numbers weeks late.

CONNECTS TO

Google and Outlook calendar sync · Email and SMS reminders · Your EMR, by API where available · Role-based access rights · Documents and e-signatures

INDUSTRY 06 CLINICS & HEALTHCARE · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

Inventory
Lots, expiry, a location per branch

Core module

- Lot numbers and expiry dates on every item
- First-expiry-first-out picking; alerts before expiry
- Transfers between branches

Purchase
Central ordering, approved suppliers

- Reordering rules to approved suppliers
- Lot and expiry recorded at the door
- Odoo 20: bill line prediction from history

Appointments + Planning
Online booking that matches the roster

- Booking pages by doctor, service or branch
- Automatic reminders; Google and Outlook sync
- Odoo 20: feedback requests after appointments

Point of Sale
The retail counter

- Counter sales that deduct the right lots
- Takings posted to Accounting

Invoicing + Accounting
Billing and branch accounts

- Invoices to patients, companies or insurers, with payment links
- P&L per branch; consolidated reports
- Odoo 20: automatic invoice reminders

REPORTS WE SET UP FIRST

Bookings by doctor, service and branch

Stock expiring by date and branch

Revenue by service and branch

Aged receivables for corporate clients

INDUSTRY 06 CLINICS & HEALTHCARE · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 Appointments

Online booking

Patients book by doctor, service or branch; reminders go out.

Replaces: A paper diary

2 Planning

Staff rosters

Rosters per branch decide which slots are bookable.

Replaces: Roster spreadsheets

3 Inventory

Medicines and consumables

Tracked per branch with lots, expiry and FEFO picking.

Replaces: Expiry checked by hand

4 Purchase

Supplier orders

Reordering rules to approved suppliers; lot and expiry at receipt.

Replaces: Orders from memory

5 Point of Sale

The retail counter

Counter sales deduct the right lots from stock.

Replaces: A separate till

6 Accounting

Billing and branches

Invoices to patients or insurers; P&L per branch.

Replaces: Billing re-keyed

Q Is Odoo a medical records (EMR) system?

No. Clinical records stay in your EMR; we can connect the two where your EMR offers an API.

Q Can Odoo handle several clinic branches?

Yes. Each branch has its own stock locations, rosters and P&L in one database, or its own company for separate legal entities.

INDUSTRY 06 CLINICS & HEALTHCARE · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Appointments	Phone calls and a diary	Online booking with reminders
Rosters	A spreadsheet per branch	Planning linked to bookable slots
Medicine expiry	Checked by hand on the shelves	Lots and expiry tracked, FEFO picking
Stock across branches	Unknown until someone counts	Live per branch, with transfers
Corporate billing	Invoices built in Word	Invoices from Odoo with payment links
Branch results	Consolidated at year-end	P&L per branch in Accounting

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1

Bookings and billing

- ✓ Booking pages per service and branch
- ✓ Invoice templates and payment links
- ✓ Bank feeds and reconciliation

PHASE 2

Stock and purchasing

- ✓ Medicines and consumables with lots and expiry
- ✓ Reordering rules and approved suppliers
- ✓ Counter sales through Point of Sale

PHASE 3

Staff and branches

- ✓ Rosters linked to bookable slots
- ✓ Consent and onboarding forms in Sign
- ✓ Branch dashboards and consolidated reporting

INDUSTRY 07 TRAVEL & TOURS

Know the margin on every booking.

Quotations that turn into confirmed bookings, supplier costs recorded against the same job, and invoices in the customer's currency.

ODOO APPS WE SWITCH ON

CRM Sales Purchase Accounting Events & Rental

FIRST PHASE · SHOW US ONE RECENT BOOKING END TO END

With one recent booking, end to end: enquiry, quotation, deposit, supplier bookings, payments and margin.

A WHAT USUALLY SLOWS YOU DOWN

Quotes in documents

Itineraries priced in Word or Excel, re-typed into invoices, versions lost in email.

Supplier costs arrive late

Hotel, transport and guide bills land weeks after the trip; margin per booking is a guess.

Currencies everywhere

Selling in one currency, buying in three, reporting in a fourth, reconciled by hand.

CONNECTS TO

WhatsApp conversations in Odoo | Website enquiry forms | Bank feeds in several currencies | Online payment providers | E-signatures for booking forms

INDUSTRY 07 TRAVEL & TOURS · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

CRM
Enquiries first

Core module

- Website, email and WhatsApp enquiries in one pipeline
- Activities so every enquiry has a next step
- Travel dates and group size on the lead

Sales
Itineraries as quotations

- Flights, hotels, transfers and tours as products with costs
- Quotation templates with optional extras
- Online signature, deposit by payment link, balance later

Purchase
Supplier costs tied to the booking

- Purchase orders to hotels, airlines and ground handlers on confirmation
- Odoo 20: AI agents create records from a supplier PDF

Accounting
Multi-currency and margin

- Quotes, invoices and bills each in their own currency
- Exchange differences posted automatically
- Odoo 20: pay bills singly or in batches with one signature

Events & Rental
Group departures and equipment

- Fixed departures and group events with tickets
- Rental of equipment with pick-up and return
- Odoo 20: event combos with their own VAT rates

REPORTS WE SET UP FIRST

- Margin by trip, product line and destination
- Pipeline by stage and travel month
- Deposits and balances due
- Supplier spend and open bills by currency

INDUSTRY 07 TRAVEL & TOURS · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 CRM

Enquiry in

Website, email or WhatsApp enquiries land with dates and group size.

Replaces: Scattered inboxes

2 Sales

Itinerary as a quotation

Services with supplier costs; the margin stays visible internally.

Replaces: Word itineraries

3 Sales

Deposit by payment link

Signed online, deposit paid, balance invoiced before departure.

Replaces: Transfers chased by email

4 Purchase

Suppliers booked

Purchase orders created when the trip is confirmed.

Replaces: A bookings spreadsheet

5 Accounting

Bills in any currency

Bills matched to orders; exchange differences posted.

Replaces: FX worked out by hand

6 Dashboards

Margin per trip

Revenue, supplier cost and margin per trip and destination.

Replaces: Margins known late

Q Does Odoo replace a GDS or booking engine?

No. Airline and hotel inventory still comes from your booking tools; we connect them where an API exists.

Q Can Odoo show the margin on each trip?

Yes. With supplier costs recorded against the booking, each trip shows revenue, cost and margin.

INDUSTRY 07 TRAVEL & TOURS · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Enquiries	Spread across inboxes and chats	One CRM pipeline with dates and group size
Itineraries	Word documents rebuilt per client	Quotation templates with optional extras
Deposits	Transfers chased by email	Online signature and payment link on the quote
Supplier bookings	A spreadsheet of confirmations	Purchase orders linked to the trip
Currencies	Rates looked up by hand	Multi-currency bills, automatic exchange differences
Margin	Worked out after the trip	Visible per trip before and after travel

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1
Enquiry to invoice
- ✓ A CRM pipeline with travel dates
- ✓ Quotation templates, deposits and payment links
- ✓ Invoices in the client's currency

PHASE 2
Suppliers and margin
- ✓ Supplier services as products with costs
- ✓ Purchase orders and bills per trip
- ✓ Margin by product and destination

PHASE 3
Online and groups
- ✓ Tour pages and enquiry forms on the website
- ✓ Fixed departures and group events with tickets
- ✓ Booking forms and waivers signed online

INDUSTRY 08 HEALTH & WELLNESS

Bookings, memberships and retail on one client record.

Every client has one record with bookings, membership, retail purchases and invoices, so the front desk sees the whole picture and finance gets clean numbers.

ODOO APPS WE SWITCH ON

Appointments · Subscriptions · Point of Sale + Frontdesk · Inventory · Accounting

FIRST PHASE · SHOW US ONE WEEK OF BOOKINGS

With one week of bookings: the services, the staff, the memberships and how payments come in.

A WHAT USUALLY SLOWS YOU DOWN

Bookings in one app, money in another

Appointments in a booking tool; payments and packages tracked elsewhere; they never agree.

Packages tracked by hand

Sessions remaining, expiries and renewals kept in spreadsheets or on cards.

Retail on a separate till

Products sold at the counter never reach the same stock or accounts as the services.

CONNECTS TO

Google and Outlook calendar sync · Email and SMS reminders · Online payments and bank feeds · Loyalty, gift cards and eWallets · WhatsApp conversations

INDUSTRY 08 HEALTH & WELLNESS · CONTINUED

B THE MODULES INSIDE, AND WHAT EACH ONE DOES

Appointments
Online booking with reminders

Core module

- Classes, treatments or rooms by staff member or resource
- Capacity limits, reminders and calendar sync
- Odoo 20: group party size and capacity override

Subscriptions
Memberships and packages

- Memberships and class packs that bill and renew automatically
- Upgrades handled on the contract
- Recurring revenue, renewals and churn reports

Point of Sale + Frontdesk
Front desk for services and retail

- Products, gift cards and packages at the counter
- Loyalty points and eWallets across visits
- Odoo 20: members-only or tier-limited check-in

Inventory
Retail products and consumables

- Stock for retail products
- Consumables used in treatments

Accounting
Deferred revenue and takings

- Membership revenue and retail sales posted
- Online payments and bank feeds reconciled

REPORTS WE SET UP FIRST

Bookings by service, staff member and day

Recurring revenue, renewals and churn

Retail sales and stock

Staff utilisation from shifts and bookings

INDUSTRY 08 HEALTH & WELLNESS · HOW IT RUNS

Six steps, one Odoo database.

C HOW THE WORK FLOWS

1 Appointments

Online booking

Clients book by staff member or resource, with capacity and reminders.

Replaces: Bookings by message

2 Subscriptions

Memberships that renew

Memberships and packs renew and bill automatically.

Replaces: Renewals chased

3 Frontdesk

Front desk check-in

Members check in; Odoo 20 can limit entry by tier.

Replaces: Names on a list

4 Point of Sale

Retail and packages

Products, gift cards and packages; loyalty and eWallets.

Replaces: A separate till

5 Planning

Therapists and instructors

Staff schedules decide which slots are bookable.

Replaces: Roster spreadsheets

6 Accounting

Recurring revenue, visible

Revenue posts; reports show recurring revenue and churn.

Replaces: Month-end spreadsheets

Q Can Odoo manage memberships?

Yes. Memberships and class packs bill and renew automatically, and Frontdesk can limit check-ins by tier.

Q Can the front desk sell products and packages?

Yes. Point of Sale sells retail products, gift cards and packages, with loyalty points and eWallets across visits.

INDUSTRY 08 HEALTH & WELLNESS · HOW IT RUNS

D BEFORE AND AFTER

THE JOB	TODAY	WITH ODOO
Bookings	Messages, calls and a paper diary	Online booking with capacity and reminders
Memberships	Renewals chased one by one	Subscriptions that bill and renew automatically
Check-in	Names ticked off on a list	Front desk check-in, members-only if needed
Retail	A separate till and stock book	Point of Sale with stock and loyalty
Staff schedules	Spreadsheets	Planning linked to bookable slots
Recurring revenue	Unknown until month-end	Recurring revenue and churn in reports

E HOW WE ROLL IT OUT · EACH PHASE LIVE FIRST

PHASE 1
Bookings and memberships
- Booking pages for classes and treatments
- Memberships and packs as subscriptions
- Payment links and automatic renewals

PHASE 2
Front desk and retail
- Point of Sale for retail, gift cards and packages
- Stock for retail products
- Daily takings posted to Accounting

PHASE 3
Staff and marketing
- Staff rosters linked to bookable slots
- Email and SMS campaigns to members
- Recurring revenue and churn dashboards

LOCALISATION

One database, each country's rules.

Odoo runs a company per country in one database, each with its own localisation, currencies and reports, with intercompany transactions between them. Philippine companies start with the BIR work; these are the Odoo 20 changes we plan around.

Philippines

PH

- Set up for BIR requirements: CAS and CBA books and invoices (BIR-01 to BIR-04)
- BIR 2306 and 2307 certificates generated from vendor bills
- SLSP, SAWT and QAP DAT exports, 2550Q, 1600-VT and 2551Q
- Basic payroll (Odoo 20): 1601-C items, 2316, 1604-C worksheets; SSS and Pag-IBIG loan deductions
- EIS route scoped with you before 31 Dec 2026; Odoo has no built-in EIS connection

LOCALISATION · CONTINUED

Singapore

SG

- GST and IRAS reporting under Odoo 20 localisation
- SFRS-aligned accounting
- Odoo 20 GST refinements toward InvoiceNow (phased 1 Nov 2025 to 1 Apr 2031)
- InvoiceNow through the Access Point you choose; TechNext is not an Access Point
- On-site work from our Waterloo Street HQ

Vietnam

VN

- Odoo 20 follows Circular 99 for accounting
- 01/GTGT VAT reporting
- SInvoice e-invoicing
- AI engineering hub in Ho Chi Minh City

Moving to Odoo 20

We upgrade existing databases on a staging copy first, migrate customisations and switch over on the date you choose.

Groups across borders

See ERP-08 for consolidation, inter-company eliminations and access per entity.

Based on Odoo 20 release notes, BIR issuances to RMC 110-2026 and the Singapore GST InvoiceNow timeline, as summarised on technext.asia in October 2026. Confirm your own compliance dates with your adviser.

WHERE WE WORK

Three hubs, one project team.

We work on-site in Singapore and remotely with clients in 25+ countries. Ask us about on-site work at your location.

---

01 Singapore

HEADQUARTERS

261 Waterloo Street, #03-36, Waterloo Centre, Singapore 180261

Sales, discovery workshops and on-site work with clients in Singapore. Support is led from here.

02 Taguig City, Philippines

MAIN DEVELOPMENT & CONSULTING HUB

Level 9, IP Center, Taguig City, Metro Manila

Odoo configuration, custom modules and integrations, with finance, HR, sales and marketing alongside.

03 Ho Chi Minh City, Vietnam

AI ENGINEERING HUB

62 Nguyễn Thị Nhung, Phường Hiệp Bình, Ho Chi Minh City

AI agents and automation, knowledge and RAG systems, chatbots and assistants, and local LLM deployment.

WHERE WE WORK · CONTINUED

One project, handed between hubs.

HOW ONE PROJECT MOVES BETWEEN HUBS

01
Singapore
Discovery workshops, scope and on-site sessions

02
Taguig City
Configuration, custom modules and integrations

03
Ho Chi Minh City
AI features, when AI is in scope

04
Singapore
Go-live, training and support led from HQ

25+
Countries with clients

90+
Enterprise clients

3
Hubs across Asia

1
Team after go-live

HOW TO START

Tell us what slows you down.

1
Tell us
Send the form at technext.asia or email sales@technext.asia. Share how your business runs today and which BIR forms you file.

2
Discovery call
We walk through how your company works and what would change. No pitch before we understand the problem.

3
Written scope
We say what to set up first and send a written quotation, stating what is included and what is not.

4
Go live
We set it up, train your team and support you after go-live.

CONTACT

EMAIL
sales@technext.asia

BIR GUIDE
technext.asia/bir-e-invoicing

WEB
technext.asia/quotation

LINKEDIN
linkedin.com/company/technextasia

HOW TO START · CONTINUED

HELPFUL TO INCLUDE IN YOUR FIRST MESSAGE

- Which BIR forms you file, and whether you are covered for e-invoicing by 31 December 2026
- Which services interest you (use the codes in this catalogue)
- How many users, companies and locations
- The systems you use today, and which you'd like to keep
- Integrations you know you need: banks, stores, payment gateways
- Any other deadline that matters, such as a financial year-end or InvoiceNow date

PHILIPPINE COMPANIES · START HERE

31 Dec 2026

Covered by BIR e-invoicing? Start before the deadline.

You need a Permit to Issue first, then EIS Certification within six months (RR 26-2025 · RMC 98-2026). Run the twelve-question self-check on p. 12 and bring it to your discovery call.

Who replies?

The TechNext team, from sales@technext.asia. An adviser who sets up Odoo for BIR requirements joins the discovery call.

What do you do with my details?

We use them only to reply. See technext.asia/privacy.

TechNext

You don't need to hire your own team.

Your trusted expert adviser for ERP and compliance.
BIR Compliance · Odoo ERP · AI Automation · Websites · Marketing

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Edition 2026/27 · Information correct as of October 2026.

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