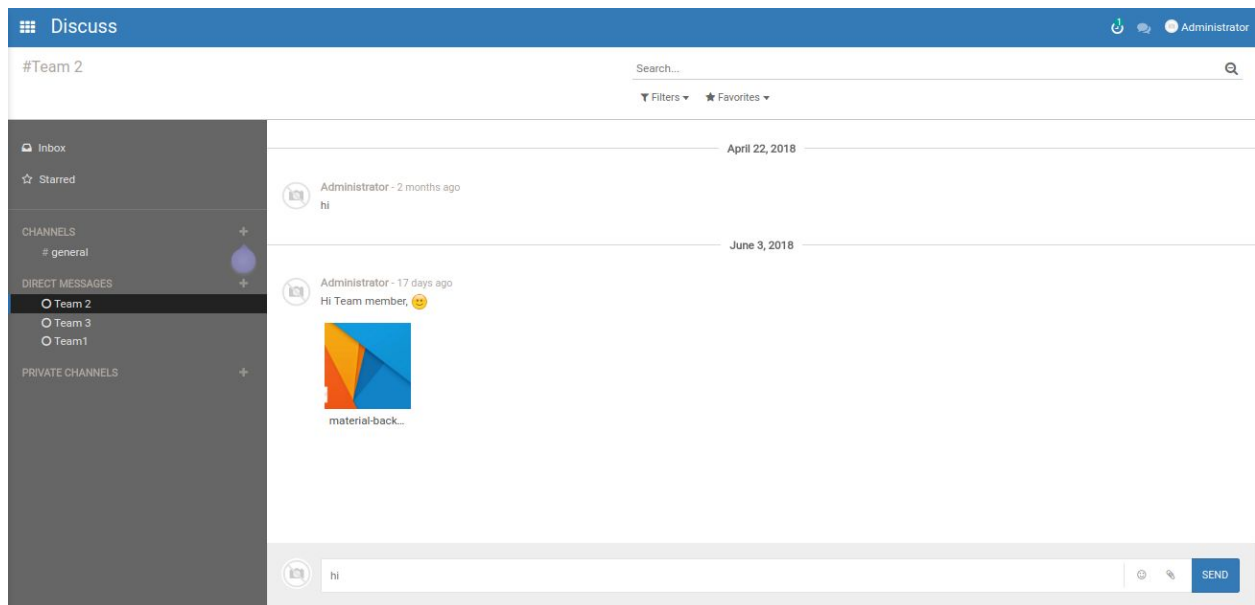# PESCO FEATURE LIST

MAIN MODULES :

1. DISCUSS & CALENDAR
2. CONTACTS
3. CRM
4. SALES
5. CONTRACTS AND TASK SCHEDULING
6. PURCHASE
7. INVENTORY
8. EMPLOYEE INFORMATION
9. ACCOUNTS
10. SETTINGS

1 .DISCUSS & CALENDAR

Discuss - Internal communication between odoo users like chat,mail etc

Calendar - Calendar activity , Meetings , schedules for personal and team.

2. CONTACTS

Contacts - It contains Customer, Vendor , Internal users and others

Contacts have important role in PESCO. Contacts have two types,

Type

   (i) Individual - if it's a single Person

   (ii) Company - If it's a registered firm,
Under the "Company" they may have multiple location to do the Service , Invoice and Contact persons. Those we can created as,

- **Contact** - The contact Persons to whom responsible for each division
- **Invoice Address** - Different invoice address that we can issue the invoices, EX:- Different branches for the company with same TRN number.
- **Service Address -** Different Service location where we want to do the services(Pest, Cleaning, Maintenance etc) .

3. CRM

1. Pipeline

Create each enquiry/Call with estimate amount. We can tag each enquiry/Call with different job type as Calljob/Contract/Complained.

Segregate each enquiry/ call using different stages , New/Qualified / Proposition / Won / Lost.

Stage names are configurable.

Once it's "Won" stage we can create Sales Quotation from the CRM it self and it's linked to Sales Module.

4. SALES

Create Sales Quotation / Order based on the customer requirement. We can analysis sales operation based on the sales figures achieved in through this.

5 .CONTRACTS

 Contract Module contains mainly 3 sections,

- Contract Basic Information
- Task Scheduling
- Invoice Scheduling

1.Contract Basic Information:

Contract Name : Customer can enter reference Number Manually
Contract Number : Auto generated Contract Number.
Start Date   & End Date : Contract Start and End Date
Prepare date : Contract Prepare Date
Sales Team : Division/Department of the company which belongs to the contract(Sales Channel)

| EDIT | CREATE | | Attachment(s) ▾   Action ▾ | | 3 / 31 ‹ › |

| SEND BY EMAIL | RENEW CONTRACT | | DRAFT   IN PROGRESS   CONFIRMED   CANCELLED |

ABCD - CONTRACT FOR FACILITY
C0043

		0 Documents	12 Tasks	Timesheets
		Active	3 Invoices	Cost/Revenue

Customer	ABCD COMANY LLC	Related Order	
Invoice Address	ABCD COMANY LLC, AL KARAMA	Payment Term	Immediate Payment
Service Address	ABCD COMANY LLC, AL KARAMA	Call Back Policy	
Start Date	01/01/2018	Sales Team	Pest Control Services
End Date	01/01/2019		
Contract Prepared date	20/06/2018		

| Settings | Task Scheduling | Emails | Service Details | Invoice Scheduling | Contract Renewal History | Print Template |

✓ Allow timesheets

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2. Task Scheduling :

  Contract Contains various treatment in different frequency for different location. Ex: -

  Customer ABCD contains two locations, Location A & Location B

    Location A   - Contains Monthly treatment every first week of Monday
    Location B   - Contains Quarterly treatment every 15th of the month.

Assign Team lead and team members for the entire year.

We can schedule the task based on the treatment mentioned in the contract. It will create entire schedules for the period mention in the contract.

3. Invoice Scheduling :

Based on the payment terms we can schedule the Invoice for the entire contract period. It will give a
Report for the management forthcoming income to the company
Ex:- 12 payments in each Month. We can divide the entire amount with 12 in a period of 30 days.

Contracts / ABCD - CONTRACT FOR FACILITY

EDIT CREATE   Attachment(s) ▾ Action ▾   3 / 31 ‹ ›

| Settings | Task Scheduling | Emails | Service Details | Invoice Scheduling | Contract Renewal History | Print Template |

Schedule No	Contract	Invoice Date	Amount	Invoice		
ABCD - CONTRACT FOR FACILITY/C0043 [01-01-2018] - 1	ABCD - CONTRACT FOR FACILITY	01/01/2018	1,000.00	INV/2018/0016	CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [01-02-2018] - 2	ABCD - CONTRACT FOR FACILITY	01/02/2018	1,000.00	INV/2018/0017	CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [04-03-2018] - 3	ABCD - CONTRACT FOR FACILITY	04/03/2018	1,000.00	INV/2018/0018	CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [04-04-2018] - 4	ABCD - CONTRACT FOR FACILITY	04/04/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [05-05-2018] - 5	ABCD - CONTRACT FOR FACILITY	05/05/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [05-06-2018] - 6	ABCD - CONTRACT FOR FACILITY	05/06/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [06-07-2018] - 7	ABCD - CONTRACT FOR FACILITY	06/07/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [06-08-2018] - 8	ABCD - CONTRACT FOR FACILITY	06/08/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [06-09-2018] - 9	ABCD - CONTRACT FOR FACILITY	06/09/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [07-10-2018] - 10	ABCD - CONTRACT FOR FACILITY	07/10/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [07-11-2018] - 11	ABCD - CONTRACT FOR FACILITY	07/11/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE
ABCD - CONTRACT FOR FACILITY/C0043 [08-12-2018] - 12	ABCD - CONTRACT FOR FACILITY	08/12/2018	1,000.00		CREATE INVOICE	CREATE AND EDIT INVOICE

5 .1 Tasks

- Once We schedules tasks for the entire contracts , we will get the daily treatment schedule based on the team assigned.

- Even we are getting calls directly , we can create task mention as "Call Job" in the type.
- Mention Start time and End time for each task.
- Update the status of each task - Ex:- New, In Progress, Completed or Cancelled

Contracts / ABCD - CONTRACT FOR FACILITY / Tasks / MONTHLY FOR KARAM OFFICE

EDIT CREATE   Attachment(s) ▾ Action ▾   1 / 6 ‹ ›

SEND EMAIL CREATE INVOICE   NEW INPROGRESS COMPLETED CANCELLED

☐ Active   ☐ Invoices0

☆ MONTHLY FOR KARAM OFFICE

T1194

Job Type	Contract		Deadline	15/07/2018
Sales Team	Pest Control Services		Action Taken	
Warranty Type			Payment Terms	Immediate Payment
Contract	ABCD - CONTRACT FOR FACILITY		Location	
Customer	ABCD COMANY LLC		Price	0.00
Services Address	ABCD COMANY LLC, AL KARAMA			
Zone	Dubai Mall			
Service Report No				
Contact Person	ABCD COMANY LLC, PHILIP JOHN			
Point of Contact	PHILIP JOHN			
Phone No	04-0000 000			
Mobile No	050- 030030			
Driver				
Service Team Lead	Operation Manager			
Team Members				

- Update each employee's timesheet durations spent for each task

Phone No   04-0000 000
Mobile No   050- 030030
Driver
Service Team Lead   Operation Manager
Team Members

Time

| Start Date | 01/02/2018 | Start Time | 10:00 AM |
| End Date | 01/02/2018 | End Time | 11:00 AM |

Reports   Service   **Timesheets**   Chemical Usage   Extra Info   Recommendation   Service Area   Pest Issue   Infestated Area   Infestation Level   Techniques

Initially Planned Hours   05:00   Progress   ▬▬ 66%

Date ▾	Employee	Description	Duration
01/02/2018	ABUL HASHEM	OUTSIDE AREA	02:00
01/02/2018	Amir Hossain	INSIDE AREA	01:18

- Inventory updates :

(i) If inventory controlled enabled version - It will automatically reduced the

Products/Chemical used in each service from the stock.

Mobile No   050- 030030
Driver
Service Team Lead   Operation Manager
Team Members

Time

| Start Date | 01/02/2018 | Start Time | 10:00 AM |
| End Date | 01/02/2018 | End Time | 11:00 AM |

Reports   Service   Timesheets   **Chemical Usage**   Extra Info   Recommendation   Service Area   Pest Issue   Infestated Area   Infestation Level   Techniques

Technician Name	Source Location	Chemical Name	Uom	Quantity	Unit Cost	Total Cost	
Amir Hossain	WH/Stock	Draker 10.2	ml	100.00	2.00	200.00	Confirm Move
Abdul Aziz	WH/Stock	Agita	EA	10.00	5.00	50.00	Confirm Move

(ii) If inventory controlled Disabled version - It will have a usage track of each products/chemical used in services.

- Note down the recommandation done the team for each services.
- Attach the service report for each services has done and later we can download it.
- Task Schedule Report will give each day schedule based on the Team lead /Supervisor assigned.

6 PURCHASE

We can order products to the supplier based on our requirement.

RFQ & Purchase Order - Allow to send multiple purchase request to the supplier
Confirm Order - Once order is confirmed an incoming shipment booked to the warehouse.

7 INVENTORY

- Product master -
     (i) Stockable Product - Using for the customers in the treatment time
     (ii) Service Product - Billable services , Ex:- Pest control Services, Cleaning Services.Purely accounting purpose.
- Receipts & Delivery orders :

(i) Receipts - Incoming shipment need to be validate to enter the products in our stock

(ii) Delivery Order - Outgoing shipment need to be validate to go out the products from the stock.

8 EMPLOYEE INFORMATION

Employee Related information,

- Employee Name , Employee ID , Department & Designation
- Personal & Official Address
- Document Information
    - Passport , Visa , Emirates ID, Labour card, Insurance etc (Issue & Expiry Date)
    - Document Dashboard - Expiry Information Dashboard
- Hourly Timesheet cost for the labours.
- Related user information for each employee

9 ACCOUNTS

All account related operation we can achieve through PESCO,

- Customer Invoice & Payments
- Vendor Bills & Payments
- Journal Entries
- PDC Modules
- Analytic Accounts (Contract Analysis - Income Vs Expenses)
- All Financial Reports, Customer & Supplier Ledger reports
- VAT Analysis Reports
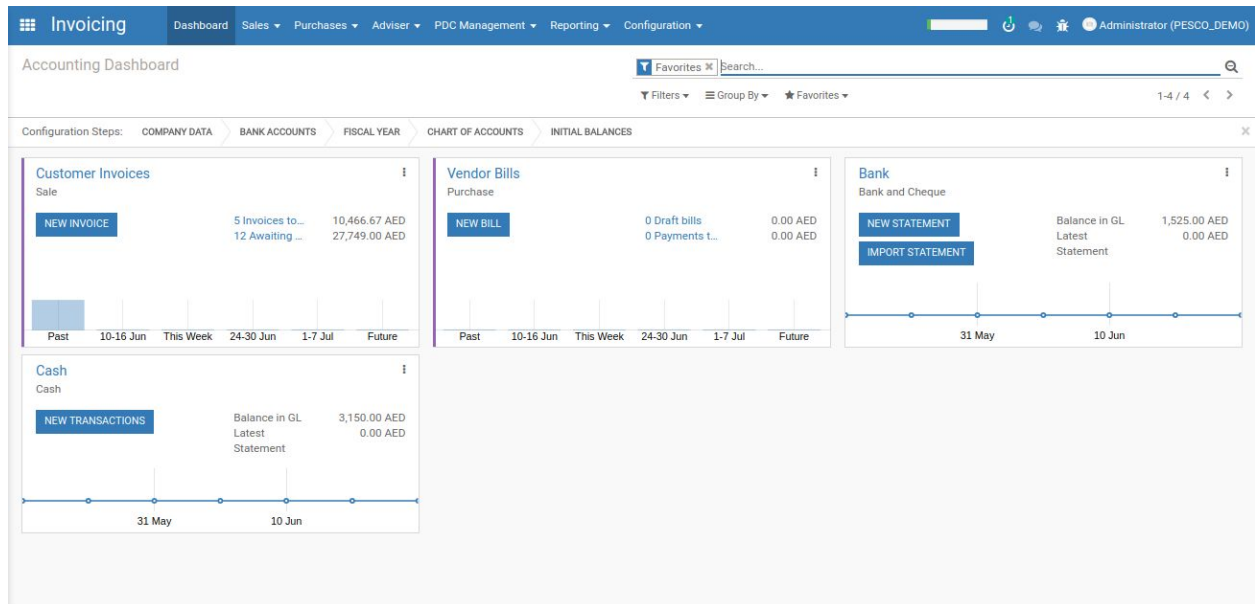
10 SETTINGS

1 . Users :

User Creation.
Assign each role to the users based on the hierarchy of the company.
Set the default screen to the each user.

2. Company :

Company master with all related information to the company

Companies / Zesty Services LLC

EDIT   CREATE   Print ▾   Attachment(s) ▾   Action ▾   1 / 1   ‹   ›

Zesty Services LLC

General Information   Apps Dashboard

Partner	Zesty Services LLC	Website	http://www.zestylabs.ae
Address	Dubai P.O.Box: 82821	Phone	04-XXXXXX
	United Arab Emirates	Email	contact@zestylabs.ae
Company Tagline		TRN Number	1002XXXXXXXXXX
		Company Registry	
		Currency	AED
			Activate more currencies.
		MOL ID	
		Company ID Number	
		as per bank	
		Company Labour	
		Number	
		Report Footer	

Social Media

Twitter Account
Facebook Account
GitHub Account