

INTERNAL TEMPLATE TRAINING



Acknowledgment of Country

We would like to acknowledge the Traditional Owners of the land, the Whadjuk people of the Noongar nation and pay respect to Elders past, present and emerging.

We recognise the unique and incomparable contribution the Whadjuk people have made and continue to make to our culture and in our community.

We will continue to seek the input of the Traditional Owners.

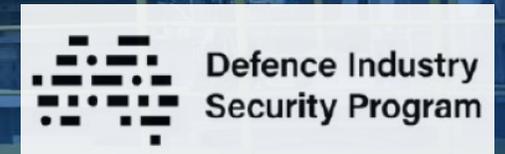
The land on which we live, meet and thrive as a community always was and always will be Noongar land.



About Profluid

Integrator & Maintainer of Industrial Valves

- ✓ Established in 2018
- ✓ WA Owned & Operated
- ✓ Valve supply, refurbishment and testing
- ✓ DISP Member & ISO27001 Compliant
- ✓ ISO 9001/14001/45001 Certified
- ✓ Latest Valves NATA Accredited laboratory in WA
- ✓ Mobile Service Unit
- ✓ Supplying to Mining, Oil & Gas, Defence and Industrial Industries



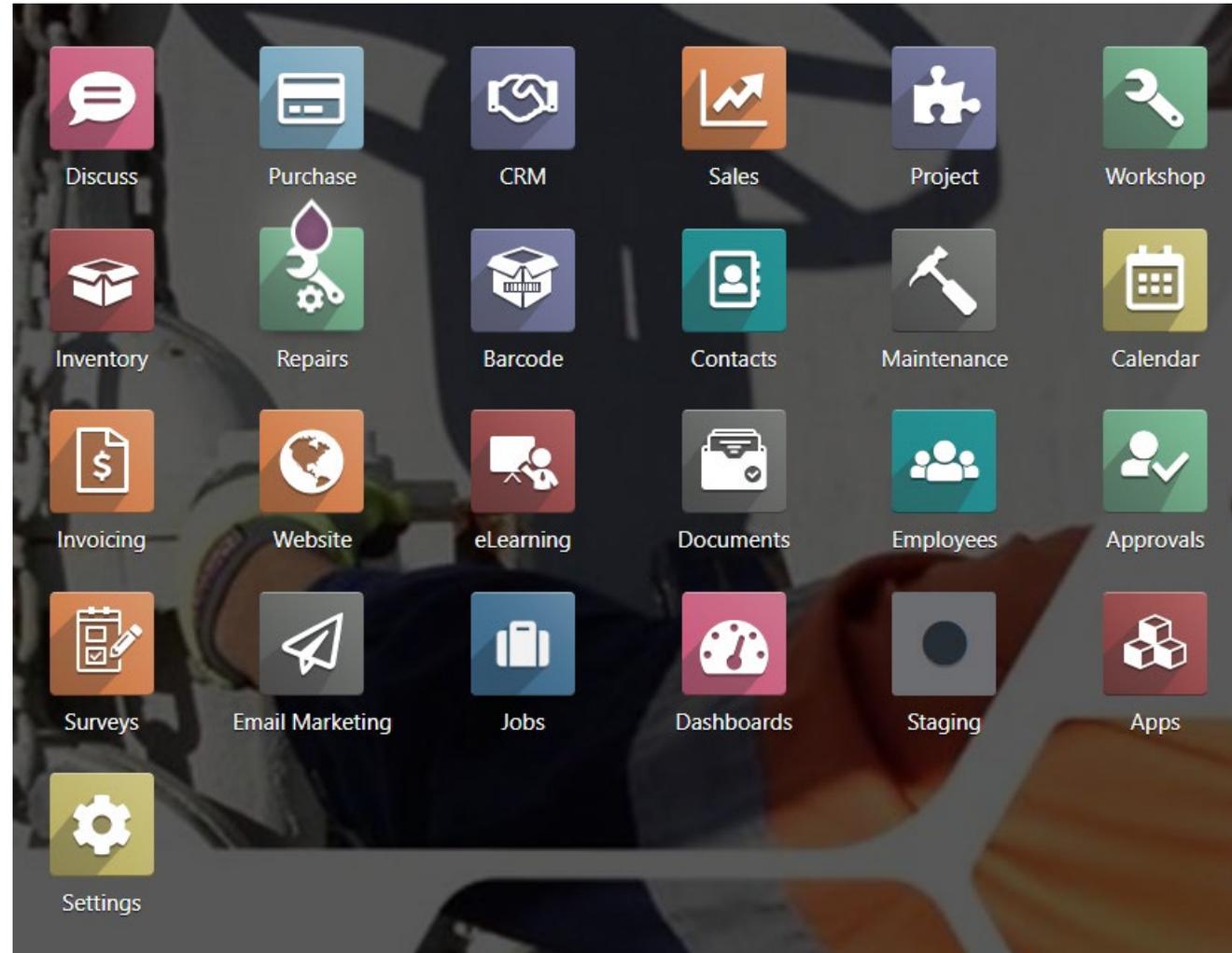
INTRODUCTION



Odoo Landing Page

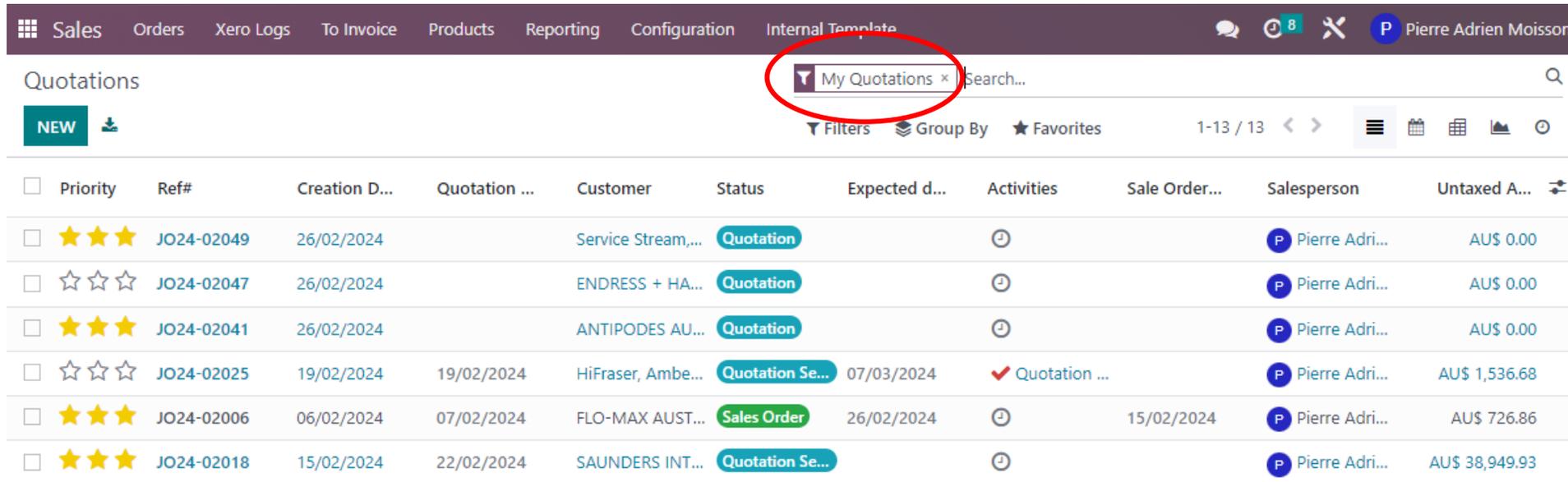
Important apps are:

- CRM
- Sales
- Purchase
- eLearning



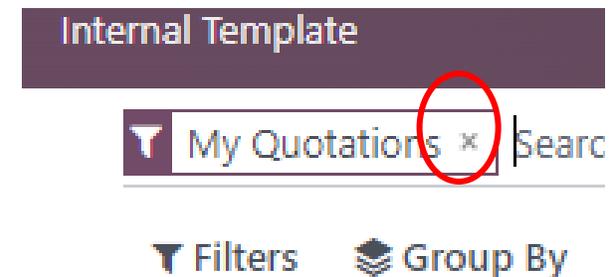
Sales App

This sales app will always show the job YOU have created due to the “My Quotations” filter



Priority	Ref#	Creation D...	Quotation ...	Customer	Status	Expected d...	Activities	Sale Order...	Salesperson	Untaxed A...
★★★★	JO24-02049	26/02/2024		Service Stream,...	Quotation		🕒		P Pierre Adri...	AUS 0.00
☆☆☆	JO24-02047	26/02/2024		ENDRESS + HA...	Quotation		🕒		P Pierre Adri...	AUS 0.00
★★★★	JO24-02041	26/02/2024		ANTIPODES AU...	Quotation		🕒		P Pierre Adri...	AUS 0.00
☆☆☆	JO24-02025	19/02/2024	19/02/2024	HiFraser, Ambe...	Quotation Se...	07/03/2024	✓ Quotation ...		P Pierre Adri...	AUS 1,536.68
★★★★	JO24-02006	06/02/2024	07/02/2024	FLO-MAX AUST...	Sales Order	26/02/2024	🕒	15/02/2024	P Pierre Adri...	AUS 726.86
★★★★	JO24-02018	15/02/2024	22/02/2024	SAUNDERS INT...	Quotation Se...		🕒		P Pierre Adri...	AUS 38,949.93

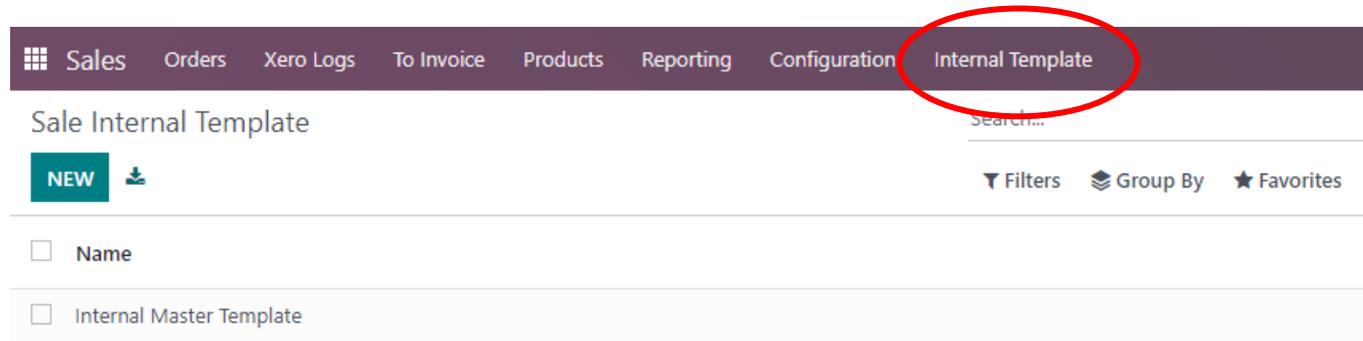
You can remove this filter to access all jobs by clicking on the X in the filter tag



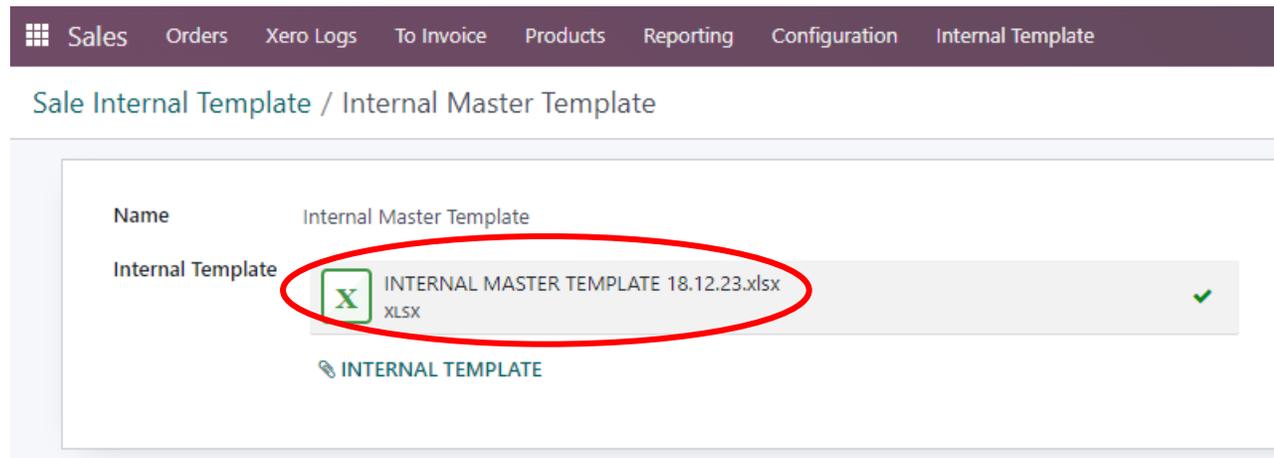
Access to Internal Template

In order to ensure you are always using the latest Internal Template it is recommended to download the Master template from Odoo

Click on Internal template at the top of the Sales menu



The Excel spreadsheet will be available to download



EXCEL





1. What do we need?

Category:
 -Valve
 -Actuator
 -Valve Accessories
 -Actuator Accessories
 -Assembly
 -Fittings
 -Spare Parts

Pressure Class:
 1- 150
 3- 300
 6- 600
 X- 1500
 ...
 A- PN10
 B- PN16

Material:
 (Valve body)
 I- Iron
 CS- Carbon Steel
 SS- Stainless Steel
 DI- Ductile Iron
 CI- Cast Iron
 ...

Drilling:
 150- ANSI150
 300- ANSI300
 X- 1500
 B- PN16
 TE- Table E

Finished Goods quantity needed

Pos	Finished Goods Code (Profluid brand)	FG Qty	Item code (Profluid internal number)	Item Description	Category	Type of product	Pressure class	Size DN	Material	Seat material	Ends	Drilling	Additional Description	FG (Internal)	Quantity

Type of Product :
 GA – Gate
 GL – Globe
 CH – Check
 BF – Butterfly
 KG – Knife Gate
 BA – Ball Valve

Size DN:
 -8
 -15
 -25
 -50
 ...

Seat Material:
 S- Soft
 M- Metal
 S- Soft
 (Buna, EPDM, PTFE, Viton ...)

Ends:
 FL- Flanged
 RF- Raised Face
 WA- Wafer
 NT- NPT Threads
 BT- BSPT Threads
 BP- BSPP threads



Tip

- If you are not sure of which code to use to fill in the Green section click on the product code tab at the bottom of the spreadsheet



Do not edit any cell on this tab

- You will have access to all the product codes used in the spreadsheet and ensure you are using the correct one.

- If an item, material, size ... is not available in this list, please notify your Team Member in order to fix this

Code	Name	Attribute	Category
GA	Gate Valve	Type	Valve
GL	Globe Valve	Type	Valve
BF	Butterfly Valve	Type	Valve
KG	Knife Gate	Type	Valve
NE	Needle Valve	Type	Valve
DB	Double Block & Bleed Valve	Type	Valve
BA	Ball Valve	Type	Valve
PV	Pinch Valve	Type	Valve
RV	Relief Valve	Type	Valve
PL	Plug Valve	Type	Valve
YS	Y Strainer Valve	Type	Valve
BS	Basket Strainer Valve	Type	Valve
VR	Vacuum Relief	Type	Valve
PR	Pressure regulator relief valve	Type	Valve
MO	Monoflange Valve	Type	Valve
SG	Sight Glass Valve	Type	Valve
SO	Solenoid Valve	Type	Valve
CX	Coaxial Valve	Type	Valve
DV	Diaphragm Valve	Type	Valve
CH	Check Valve	Type	Valve
AR	Air Release valve	Type	Valve
BP	Back Pressure Regulation	Type	Valve
TV	Testable Double Check Valve B.	Type	Valve
RP	Reduced Pressure Zone Valves	Type	Valve
VB	Air Vent and Vacuum Breaker Valve	Type	Valve
FV	Float Valve	Type	Valve
CV	Control Valve	Type	Valve
SC	Steam CoControl Valventrol Valve	Type	Valve
AC	Actuator	Type	Actuator
VA	Valves Accessories	Type	Valves Accessories
AA	Actuator Accessories	Type	Actuator Accessories
FS	Fittings	Type	Fittings
FC	Flange Gasket and Bolted Connection	Type	Flange Gasket and Bolted Connection
PA	Product Assembly	Type	Product Assembly
PC	Pressure Certificate	Type	Document
MA	Material Certificate	Type	Document

2. Fill up supplier information with quoted info

- Grey cells will update automatically

Buying Cost Local:

- Input the price from the supplier's quote in their local currency

Mark Up:

- Standard 1.42
 -H+ : 1.5 when H+ brand requested, otherwise 1.3

Supplier 1											
Supplier 1	Product Ref	Buying Currency	Buying cost local	Total Buying cost local	Currency Exchange	Buying Cost AUD	Total Buying cost AUD	Mark-up	Selling price AUD	Gross profit	Lead time
				0.00	0.00	AUD -	AUD -		AUD -	AUD -	

Supplier #

- Select the supplier name in the drop down list.
 - If supplier is not in the list contact Sales

Product Ref:

Input the supplier's product ref if known.
 -Update when you receive quote from supplier

Buying Currency:

- This will appear on supplier's quote. Can be prefilled based on the supplier's location.
 If the quote is in US Dollars, input USD;
 If the quote is in Euros, input EUR

 - You will note that this updates automatically the currency exchange rate in the next column

Lead Time:

Input the supplier's lead time stated in their quote

3. Populate “selected supplier” section

-Pick the supplier based on critical drivers for the client : Cost, lead time ...

Tax included:
- Input if tax is included or not in the buying price

Selected supplier														
selected supplier	Product Ref	Buying Currency	Buying cost local	Total Buying cost local	Exchange Rate	Buying Cost AUD	Selling price AUD	Tax Included	Quantity	Total buying Cost	Total Selling	Gross profit AUD	Markup control	Lead time
				0.00	0.00	AUD -	AUD -				AUD -	AUD -	-	

Selected Supplier:
- Input the selected supplier

Product Ref:
Input the supplier’s product reference

Buying Currency:
This will appear on supplier’s quote.

Buying Cost Local:
Input the price from the supplier’s quote in their local currency

Lead Time:
Input the supplier’s lead time stated in their quote

3. Populate “selected supplier” section

-Pick the supplier based on critical drivers for the client : Cost, lead time ...

Minimum freight charge: \$250 / order

Freight							
Estimated weight	Total Estimated weight	Freight type from supplier	Estimated cost per kg	Estimated cost	Mark up	Final estimated cost	Supplier
				AUD 0.00	1.10	AUD -	

Estimated weight
- Check the datasheet supplied by manufacturer to get an idea of the parts weight

Total Estimated Weight:
- Take into account the quantities and any special packaging

Freight type from Supplier:
- Air
- Sea
- Road

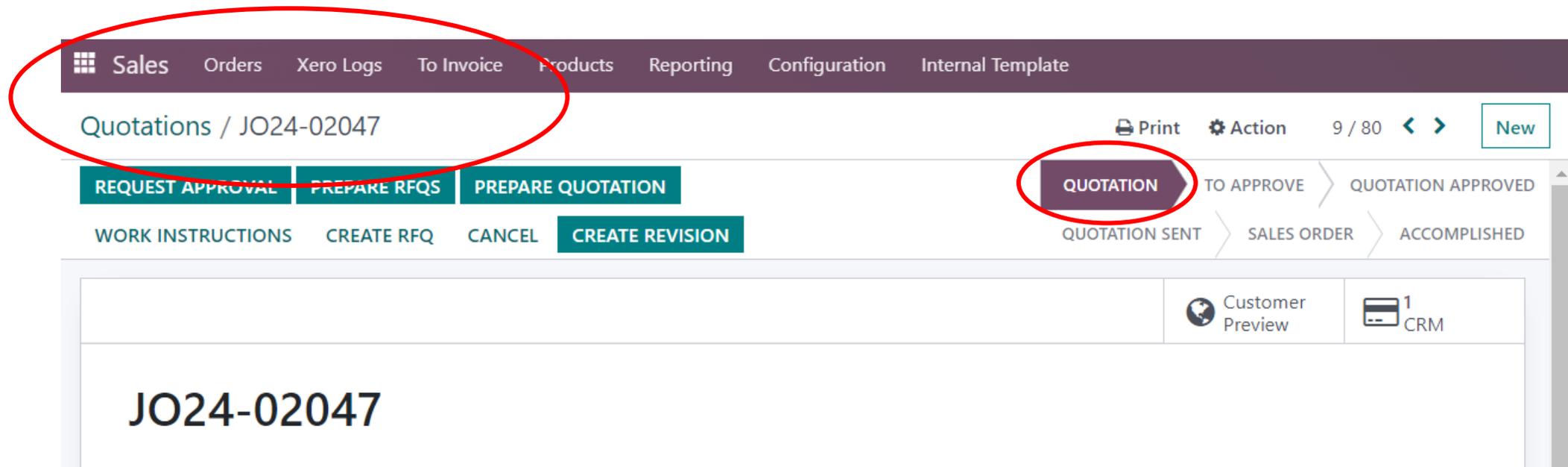
Cost per Kg:
- Air: \$25/kg
- Sea: \$5/kg
- Road :

Supplier:
Input the selected freight supplier
Usually : InXpress

4. Upload of Internal Template back in Odoo

Once you have finalized the Internal Template on Excel, ensure you have saved a local copy that you can retrieve.

Go back on ODOO on you Quotation Screen that sould look like this:



The screenshot displays the Odoo Quotation interface for document JO24-02047. The top navigation bar includes 'Sales', 'Orders', 'Xero Logs', 'To Invoice', 'Products', 'Reporting', 'Configuration', and 'Internal Template'. The 'Sales' menu is circled in red. Below the navigation bar, the breadcrumb 'Quotations / JO24-02047' is visible. The workflow area shows several buttons: 'REQUEST APPROVAL', 'PREPARE RFQS', 'PREPARE QUOTATION', 'WORK INSTRUCTIONS', 'CREATE RFQ', 'CANCEL', and 'CREATE REVISION'. The 'QUOTATION' button in the workflow is circled in red. The workflow steps are: 'QUOTATION' (circled), 'TO APPROVE', 'QUOTATION APPROVED', 'QUOTATION SENT', 'SALES ORDER', and 'ACCOMPLISHED'. On the right side, there are 'Print' and 'Action' icons, a page indicator '9 / 80', and a 'New' button. Below the workflow, there are two sections: 'Customer Preview' and '1 CRM'.

JO24-02047

4. Upload of Internal Template back in Odoo

Then click on the green button at the top : PREPARE RFQ

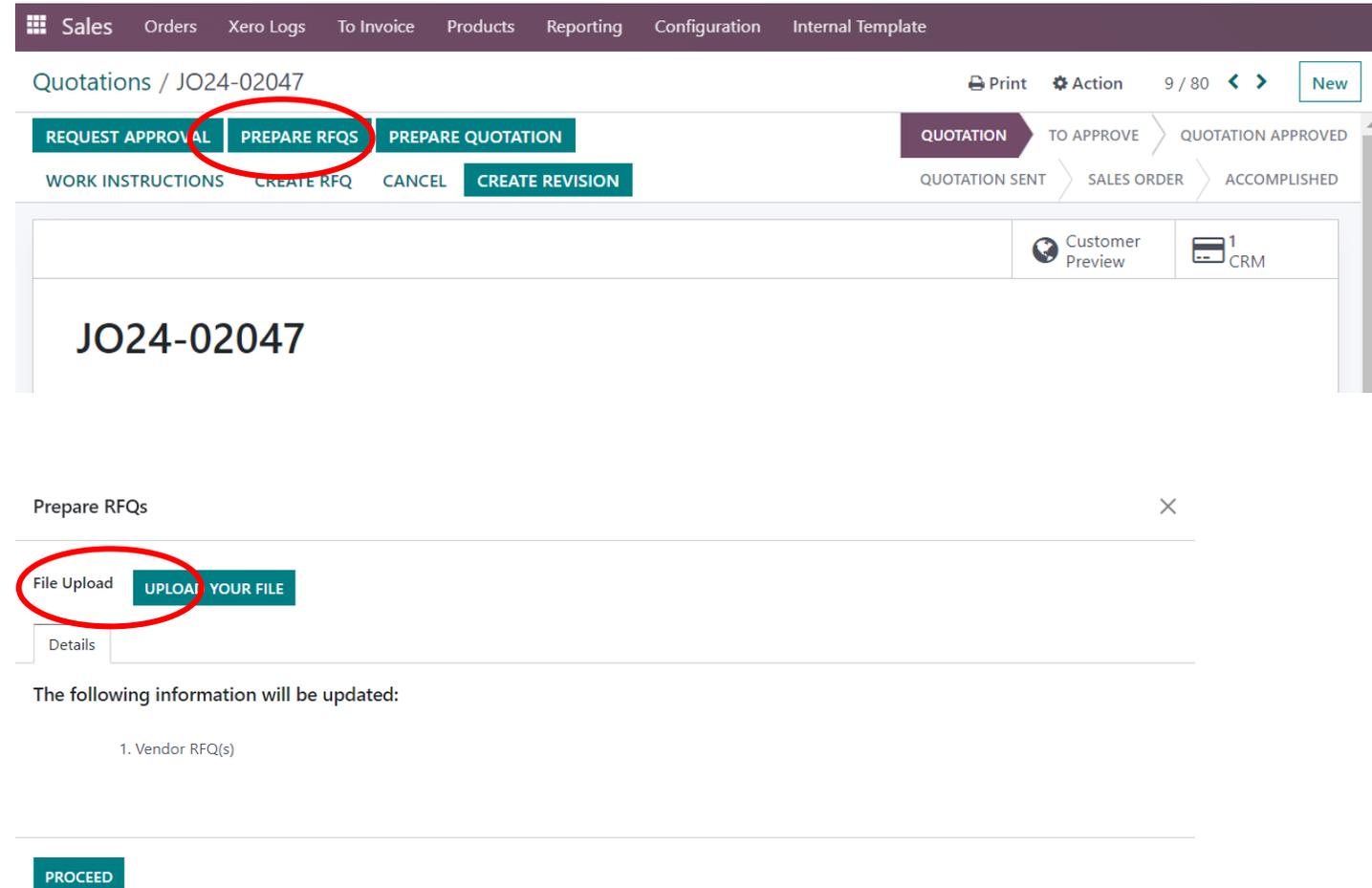
This will allow to upload the internal template with information ODOO can understand

A pop up window will appear allowing you to UPLOAD YOUR FILE by browsing your computer and selecting the Internal Template Excel file.

ODOO will process the upload and let you know the outcome :

- Success : the internal was correctly filled in
- Error : Double check the internal spreadsheet for any error

If you are successful you can now go back to the general Sales ODOO Training.



The screenshot shows the Odoo 'Internal Template' interface for quotation JO24-02047. The top navigation bar includes 'Sales', 'Orders', 'Xero Logs', 'To Invoice', 'Products', 'Reporting', 'Configuration', and 'Internal Template'. The main header displays 'Quotations / JO24-02047' with 'Print', 'Action', and '9 / 80' options. A process flow includes 'REQUEST APPROVAL', 'PREPARE RFQS' (circled in red), 'PREPARE QUOTATION', 'QUOTATION', 'TO APPROVE', and 'QUOTATION APPROVED'. Below this are 'WORK INSTRUCTIONS', 'CREATE RFQ', 'CANCEL', and 'CREATE REVISION' buttons. A 'Customer Preview' icon and '1 CRM' indicator are visible. The main content area shows 'JO24-02047'. A 'Prepare RFQs' pop-up window is open, featuring a 'File Upload' button (circled in red) and an 'UPLOAD YOUR FILE' button. The pop-up also has a 'Details' tab and a message: 'The following information will be updated: 1. Vendor RFQ(s)'. A 'PROCEED' button is at the bottom of the pop-up.

5. Assembly made of 2 or more items

- Fill in the green section the same way as usual

-Let's take the example of an assembly composed of: 1x Butterfly valve

2x Extensions

1x Actuator

List the valve, extension, actuator along with the requested quantities

Category	Type of product	Pressure class	Size DN	Material	Seat material	Ends	Drilling	Additional Description	FG (Internal)	Quantity
Valve	BF	1	200	SS	M	NT				1
Valve Accessories								Extension lever 1200mm		2
Actuator								Actuator Model and basic spec		1

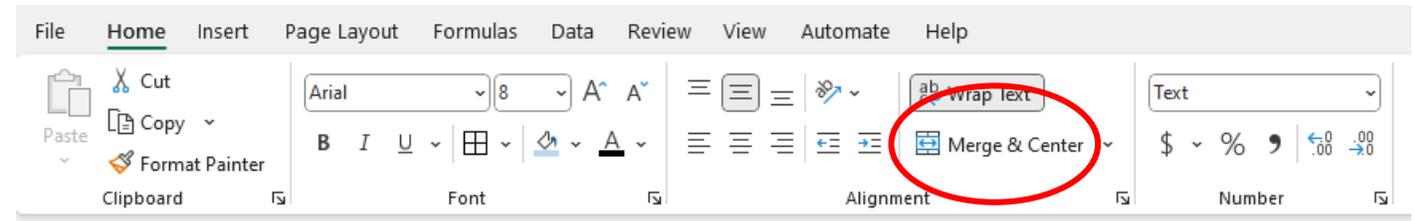
5. Assembly made of 2 or more items

In order for the system to understand it is an assembly :

- Select and highlight the POS and FG Qty cells relevant to the assembly and click in merge

- Finally input the correct POS number and FG Qty (how many assemblies are required)

- This will now be understood by Odoo as 1 finished goods composed of 3 different items



Finished Goods Code (Profluid brand)	FG Qty	Item code (Profluid internal number)	Item Description	Category	Type of product	Pressure class	Size DN	Material	Seat material	Ends	Drilling	Additional Description	FG (Internal)	Quantity
BF-200-SS-M-NT-		BF-200-SS-M-NT-	Butterfly Valve-Class150-DN200-Stainless Steel-Seat Metal Seat-End Connection NTP-Thread	Valve	BF	1	200	SS	M	NT				1
.....			Valve Accessories								Extension lever 1200mm		2
.....			Actuator								Actuator Model and basic spec		1