

# OpenERP Useability

## Preparing v6.2

- **User Interface: 55%**
  - Easy to use / configure / install
  - Sexy & clean features
- Social: 10%
- Framework: 20%
- Bugfixes/cleaning: 10%
- New Features: 5%

Our useability goal, by order of importance:

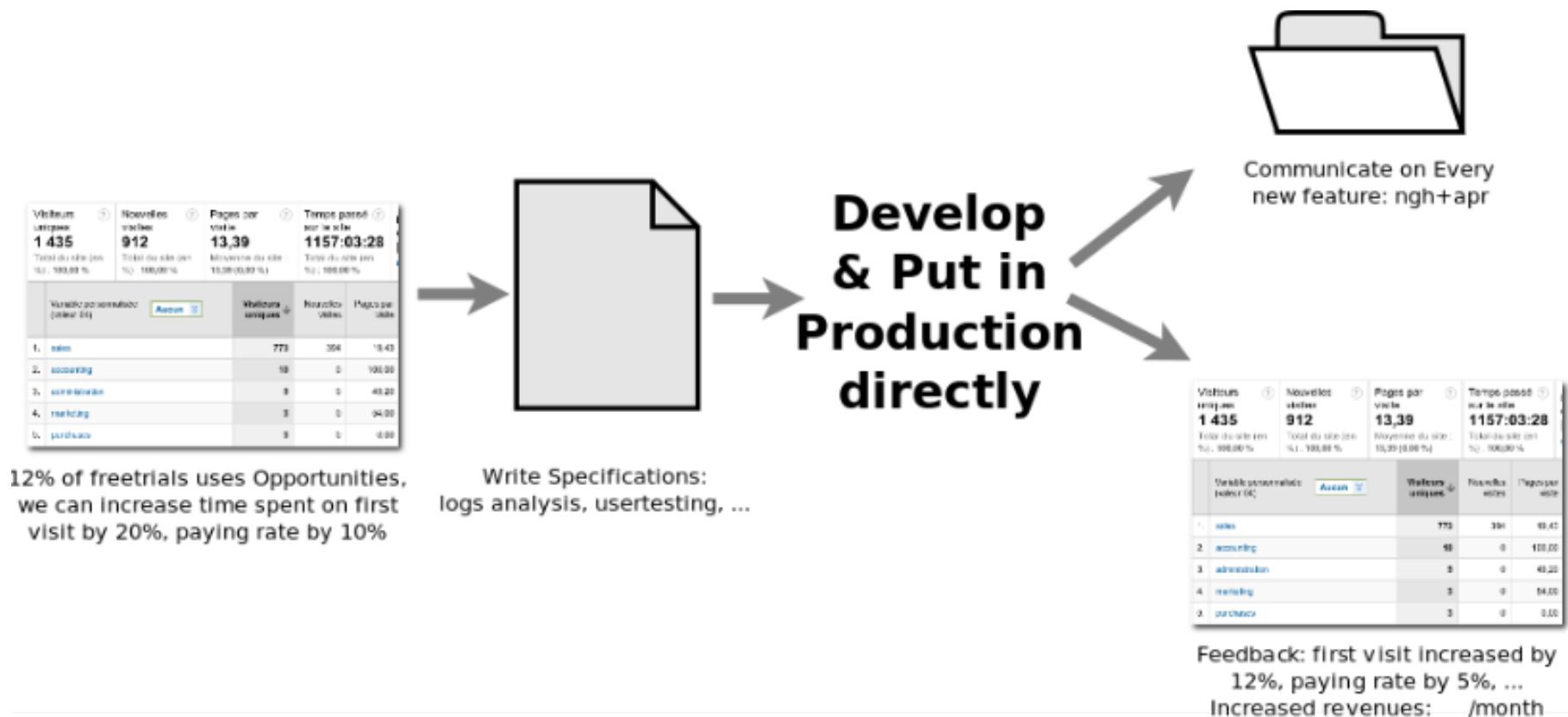
1. Make it easier
2. Make it more productive (less important)

# Useability Process

- The best/only way to make an application become perfect is to **use it for ourselves !**
- V6.2 goal: focus & put in production @OpenERP SA:
  - Purchase Management
  - Partner portal: social discussions, sharing of docs, ...
  - All HR Features: appraisals, expense, leaves: partially done
  - Events: partially done
  - Multi-companies: partially done

# Useability Process

- We need to analyze: Google Analytics on SaaS
  - Statistics to know what to improve
  - Measurable feedback to know how to improve
- Organize communication on every new features
- Do user testing with lambda users per new feature, at least one usertesting.com per feature.



# Context is important

You work for a project, in a warehouse, ...

- Instead of going to tasks, issues and then filter → you enter a project and get related tasks, issues, ... (like in github, launchpad, trac)
- The project becomes the context.
- From the project, you can:
  - View tasks
  - View issues
  - Get billing info: invoices...
- Same for warehouse, customers, products, hr department, ... (a worker work in a warehouse, he does not want to filter on a warehouse)
  - → Improvement of our relate & global context feature

# Example: SohoOs

The screenshot displays the OpenERP SohoOs web application. The browser tabs show 'OpenERP', 'Blinksale | Invoice 100', and 'SohoOS'. The address bar is 'openerp.sohoos.com/display/#contacts/a14/view'. The navigation bar includes 'sohoos', '+ New', 'Communicate', 'Prices', 'Tools', and 'My Account'. The left sidebar, titled 'myEverything', contains a search bar, a 'View by: All Contacts' dropdown, and a list of contacts with 'Fabien Pinckaers' selected. The main content area shows the client's details: 'Fabien Pinckaers (client)', email 'i@i.am', phone '+3281813700', and website 'www.openerp.com'. Below this is a section for 'Recent activities with this client' listing four events: editing an invoice, posting a note, creating an invoice, and creating an estimate. A right sidebar contains icons for 'Details', 'Estimates', 'Invoices', and 'Notes'. A 'Live Help & Feedback - Click Here!' button is at the bottom right. Four arrows point from the right sidebar icons towards the right edge of the image.

OpenERP

Blinksale | Invoice 100

SohoOS

openerp.sohoos.com/display/#contacts/a14/view

sohoos

+ New

Communicate

Prices

Tools

My Account

myEverything

Search Contacts

+ View by: All Contacts

Fabien Pinckaers

fdsfsdfsfd

fdsfsdfsdsf

Sample Client

Sample Contact

Sample Lead

Sample Vendor

Import Contacts >

Edit | Delete Contact

**Fabien Pinckaers (client)**

Email: i@i.am

Phone: +3281813700

Website: www.openerp.com

Recent activities with this client:

- Edited invoice number 00000002 for \$228.600  
Dec 15, 2011 20:56
- Posted a new note  
Dec 11, 2011 13:04
- Created new invoice number 00000002 for \$228.600  
Dec 11, 2011 13:04
- Created new estimate number 00000002 for \$228.600  
Dec 11, 2011 13:03

Details

Estimates

Invoices

Notes

Live Help & Feedback - Click Here!



## **Simplification → Remove Elements**

- To simplify, we must reduce!
- Remove what's:
  - Redundant
  - Not used
- Put in extended view:
  - What's not required to use the application

- To be removed:

- Shortcuts → if the menu is simple, we don't need shortcuts. This would require to review the menu.
- Homepage → directly go to the latest application. Confusing to have two way to access a root app like “Sale”.
- Dashboards → nobody use them, put in Reporting section
- Top right toolbar → with home, preferences, help...; simplify ala google
- Pager / Multi-Views on one2many → only if several exists
- Menu tips (use them in empty lists or help tooltip only)
- Res.Logs (directly integrated in the history of a document, through the new “chatter” system)
- Relate buttons on right → replaced by search criteria that stays between menus.
- Default filters on state for list views
- Edit icon (pencil) in lists (they click on the record, then click edit)

# Extended View: Simplify Forms

We don't need all those stuff in simplified view!  
Current forms are overloaded.

The screenshot shows the OpenERP web interface for 'Customer Invoices'. The form is titled 'Customer Invoices' and includes a sidebar with navigation links like 'Customers', 'Customer Invoices', 'Customer Refunds', 'Suppliers', and 'Reporting'. The main form area contains fields for 'Number', 'Currency' (set to EUR (€)), 'Customer' (Eric Dubois), and 'Invoice Address' (Eric Dubois, Belgium, Mons, Ct). Below these are tabs for 'Invoice', 'Other Info', and 'Payments'. The 'Invoice' tab is active, showing an 'Invoice Line' table with columns for 'DESCRIPTION', 'QUANTITY', 'UNIT OF MEASURE', 'UNIT PRICE', and 'SUBTOTAL'. The table contains three rows: '[CPU\_GEN] Regular processor config', '[FAN] Regular case fan 80mm', and 'Highjnk'. To the right of the table is a 'Payment Term' dropdown. Below the table is a 'Tax' section with a 'Create' button and a table for 'TAX DESCRIPTION', 'TAX ACCOUNT', 'BASE', and 'AMOUNT'. At the bottom right, there are summary fields for 'Untaxed' (309.00), 'Tax' (0.00), 'Total' (309.00), and 'Residual' (0.00), along with buttons for 'Draft', 'Open', 'Paid', and 'Validate'. Red annotations with arrows point to various parts of the form: 'no need if not accountant' points to the 'Number' field; 'extended' points to the 'Invoice Line' table; 'no need if no more than 80 records' points to the 'Payment Term' dropdown; 'no need as we have residual' points to the 'Tax' section; and 'Residual is not clear: To Pay:' points to the 'Residual' field. The 'Tax' section and the 'Draft' button are also crossed out with a large red 'X'.

OpenERP  
Your Company (trunk)  
Administrator  
Customers | Meetings | Products

SALES WAREHOUSE ACCOUNTING SETTINGS

Customer Invoices

Save Cancel

Number: Currency: EUR (€)

Customer: Eric Dubois Invoice Address: Eric Dubois, Belgium, Mons, Ct

Invoice Date: Payment Term:

Invoice Other Info Payments

extended

| DESCRIPTION                        | QUANTITY | UNIT OF MEASURE | UNIT PRICE | SUBTOTAL |
|------------------------------------|----------|-----------------|------------|----------|
| [CPU_GEN] Regular processor config | 1.00     | PCE             | 300.00     | 300.00   |
| [FAN] Regular case fan 80mm        | 1.00     | PCE             | 8.00       | 8.00     |
| Highjnk                            | 1.00     | PCE             | 1.00       | 1.00     |

Tax Create First [1 to 0] of 0 Last

| TAX DESCRIPTION | TAX ACCOUNT | BASE | AMOUNT |
|-----------------|-------------|------|--------|
|                 |             |      |        |

no need if not accountant

no need if no more than 80 records

no need as we have residual

Residual is not clear: To Pay:

Untaxed: 309.00  
Tax: 0.00  
Total: 309.00  
Residual: 0.00

Draft Open Paid Validate

Powered by openerp.com.

# Extended View: Web Client Elements

OpenERP - Open Source | OpenERP - Unsupported

trunk\_5232.runbot.openERP.com:9481/web/webclient/home#id=7&view\_type=form&action\_id=445

**OpenERP** Fairy Prefab Products BV (trunk\_5232) Administrator

Customers | Companies | Meetings | Products

SALES | PURCHASES | WAREHOUSE | PROJECT | ACCOUNTING | HUMAN RESOURCES | POINT OF SALE | POS BACKEND | SETTINGS

Sales Orders

Save Cancel

Order Reference : SO007 Date : 12/31/2011 Paid ? : ☐

Shop : Fairy Prefab Products BV Customer Reference : Delivered ? : ☐

Sales Order Other Information History

Customer : Axelor Ordering Contact : Laith Jubair, France, Champs sur Mar

Invoice Address : Laith Jubair, France, Champs sur Mar Shipping Address : Laith Jubair, France, Champs sur Mar

Pricelist : Public Pricelist (EUR)

Sales Order Lines Create

| DESCRIPTION                    | QTY(UOM) | UOM | DISCOUNT (%) | UNIT PRICE | SUBTOTAL  |
|--------------------------------|----------|-----|--------------|------------|-----------|
| [MB1] Mainboard ASUSek A7N8X   | 15.000   | PCE | 0.00         | 250.00     | 3750.00 × |
| [MB2] Mainboard ASUSek A7V8X-X | 5.000    | PCE | 0.00         | 500.00     | 2500.00 × |

Untaxed Amount ? : 6250.00 Taxes ? : 0.00 Total ? : 6250.00

Compute Advance Invoice

Quotation In Progress Done

Cancel Order Confirm Order

Attachments

Reports

Quotation / Order

Customize

Manage Views

Edit Workflow

Customize Object

Translate

Other Options

Import

Export

not in edit view, only in page view

Powered by OpenERP - Unsupported/Community Version

# Page view of documents

An invoice should look like an invoice.

# Information is beautiful

OpenERP forms have been designed for a creation / edition purpose. But when people **browse existing data**, they have a completely different need. We need to **show the information** efficiently !

**Mick Swagger**  
Assistant at Acme Widgets

Notes & Emails | Deals | Twitter

Add a note about Mick

Show options (attach files, cases, deals, or change permissions) Add this note

Excerpt view: Subscribe to daily digest emails RSS Feed

**Monday, June 20**  
Note by David H.  
Jim and I met with Pauline and Mick today to discuss the package redesign proposal. Everyone agreed that the timeline will be challenging. They were ok with the pricing and liked the artistic direction we proposed.

Mick is going to discuss the whole package with Jim (the president of Acme) and he'll get back to us with a final decision on Thursday. If everyone is on board we plan to have a followup conversation next week to iron out all the details.

**Thursday, June 16**  
Note by David H.  
Here is a copy of proposal I send to Mick.

[Widget Package Redesign.pdf](#)

**Thursday, June 16**  
Note by David H.

**Edit this person**

Tasks Add a task

Today  
☐ Phone about package redesign printing deadlines

Personal Info vCard

[mick@acmewidgets.com](mailto:mick@acmewidgets.com) Work

555-323-2203 Work  
555-215-9325 Mobile

Call Mick on Skype

Home 4:37pm • 23°C/73°F  
Map data ©2011 Google

400 Howard Street  
Chicago, IL  
United States

Background  
Mick likes camping and fishing.  
Ice fishing is his favorite.

Birthday  
September 7  
Reminder set for Jason F.

Anniversary  
April 24

Referred By  
Gillian Bordeaux

Company Info

[Acme Widgets](#)

[info@acmewidgets.com](mailto:info@acmewidgets.com) Work

OpenERP

File Edit View Forms Options Diagram Shortcuts Help

New Save Delete Back Forward List Print Action Attachments Merge Reset Close

Partners 26

Name:  Code:  Customer: ☒ Supplier: ☒

Title:  Language:

General Sales & Purchases History Notes Accounting Categories

Address

Address Type: Default

Street: 11 Hong Kong street Street2:

Zip: 224100 City: Taiwan

Country: Taiwan Ref. State:

Phone:  Fax:

E-Mail:

Contacts

| Partner Seq. | Contact | Partner Function | Phone | Fax | Extension | Other | E-Mail |
|--------------|---------|------------------|-------|-----|-----------|-------|--------|
| 0            | Tang    | Salesman         |       |     |           |       |        |

Records: 1 / 21 of 21 - Editing document (id: 0)  
Model: (localization) (all) Administrator Requests: 1 request(s)

Not usefull when browsing or using customers, but good for creation !  
I propose to create a **PAGE** view, which is the current readonly form → example on **partners**.

# Page View, example 2

The screenshot displays the OpenERP web application interface. The browser window shows the URL `openerp.sohoos.com/display/#data/14/QUOTES/a14`. The top navigation bar includes links for New, Communicate, Prices, Tools, and My Account. The sidebar on the left, titled 'myEverything', contains a search bar and a list of contacts, with 'Fablen Pinckaers' selected. The main content area shows an estimate for 'Fablen Pinckaers' with the status 'Delivered'. The estimate includes a table of items and a summary of totals.

**Estimate number 00000002 > Delivered**

**OpenERP**  
Belgium

Date: Dec 11, 2011

**To: Fablen Pinckaers**

| Item               | Qty  | Price  | Total             |
|--------------------|------|--------|-------------------|
| Sample Product     | 2.00 | 100.00 | 200.00            |
| <b>Net Total</b>   |      |        | 200.00            |
| <b>Discount</b>    |      |        | 20.00             |
| <b>VAT</b>         |      |        | 8.10              |
| <b>Sales</b>       |      |        | 18.00             |
| <b>Service</b>     |      |        | 22.50             |
| <b>Grand Total</b> |      |        | <b>USD 228.60</b> |

**Terms & Conditions**  
- Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.

Live Help & Feedback - Click Here!



# Don't make me think.

We should better guide the user to the next step

# Next Steps: not too much possibilities

OpenERP - Open Source | OpenERP - Unsupported | Amazon Web Services | OpenERP - Unsupported

trunk\_5232.runbot.openerp.com:9481/web/webclient/home#id=76&view\_type=form&action\_id=445

**OpenERP** Faay Prefab Products BV (trunk\_5232)  
Administrator

Customers | Employees | Meetings | Products

**SALES PURCHASES WAREHOUSE PROJECT ACCOUNTING HUMAN RESOURCES POINT OF SALE POS BACKEND SETTINGS**

Sales Orders: Save Cancel

Reference: [Field] Date: 12/31/2011 Paid: [Field] Shop: Faay Prefab Products BV Customer Reference: [Field] Delivered: [Field]

**Sales Order Other Information History**

Customer: Axelor Ordering Contact: Laith Jubair, France, Champs sur Mar  
Invoice Address: Laith Jubair, France, Champs sur Mar Shipping Address: Laith Jubair, France, Champs sur Mar  
Pricelist: Public Pricelist (EUR)

**Sales Order Lines** Create

| DESCRIPTION                     | QTY(UOM) | UOM | DISCOUNT (%) | UNIT PRICE | SUBTOTAL  |
|---------------------------------|----------|-----|--------------|------------|-----------|
| [MB1] Mainboard ASUStek A7N8X   | 15.000   | PCE | 0.00         | 250.00     | 3750.00 × |
| [MB2] Mainboard ASUStek A7V8X-X | 5.000    | PCE | 0.00         | 500.00     | 2500.00 × |

Untaxed Amount: 6250.00 Taxes: 0.00 Total: 6250.00 Compute Advance Invoice

Quotation In Progress Done Cancel Order Confirm Order

Powered by OpenERP - Unsupported/Community Version

**What should I do ?**

# Propose next steps

**New Invoice**

Client:  - or - [Add a new client...](#)

Date: 2011 December 26

Invoice ID:  Last used: 100

P.O. Number:

| Unit  | Qty  | Description | Tax | Price | Total  |
|-------|------|-------------|-----|-------|--------|
| Hours | 1.00 |             |     | 0.00  | \$0.00 |

[+ Add New Line](#)

Subtotal: \$0.00

Total Due: \$0.00

**Invoice Notes** (add any extra details your invoice might require here)

When you are finished, save your invoice. Then you can send it.

**SAVE INVOICE** or [Cancel](#)

**INVOICE DETAILS**

Currency: U.S. Dollars

**Tax & Freight**

☐ Sales Tax

☐ Freight

**Payment is due**

15 days (January 10, 2012)

**Late Fee**

No Late Fee

Only one main  
button/option

# Proposition

---

- No button in a “form” view, unless used for useability like filing a list of fields (should be avoided)
- Only “Save” and “Cancel” in form/edit view
- After saving in edit view, you arrive on page view for preview of document and actions (send, confirm, ...)
- No difference between the type of actions:
  - Reports, Wizards, Edit, Delete, → They all are actions. Most users will not understand why some actions are different (right toolbar, bottom of screen, top toolbar)
- In Page/Kanban view: action button:
  - Confirm Invoice,
  - Cancel,
  - Edit, Print, ...

# Example: blinksale.com

The screenshot displays the OpenERP Blinksale web interface. The browser address bar shows the URL `https://openerp.blinksale.com/invoices/2916993`. The top navigation bar includes links for DASHBOARD, BLINKPAY, ESTIMATES, INVOICES, PURCHASES, and PEOPLE. The 'INVOICES' section is active, showing 'Invoice 100' for 'Tiny Sprl'.

**Invoice Details:**

- Client:** Tiny Sprl, Chaussée de Namur 40, 1367, BW, Grand-Rosière, Belgium
- Date:** 24 Dec 2011
- Due Date:** Due 06 Jan 2012 (NET 15)
- Amount:** \$2,420.00

| Qty                          | Unit  | Description | Price    | Total      |
|------------------------------|-------|-------------|----------|------------|
| 20.0                         | Hours | Do the job  | \$100.00 | \$2,000.00 |
| <b>Subtotal:</b>             |       |             |          | \$2,000.00 |
| <b>Sales Tax (at 21.0%):</b> |       |             |          | \$420.00   |
| <b>Total Due:</b>            |       |             |          | \$2,420.00 |

**Invoice Notes:** thanks.

**History & Comments:** You sent this invoice to Fabien P. at Tiny Sprl on 24 Dec 2011.

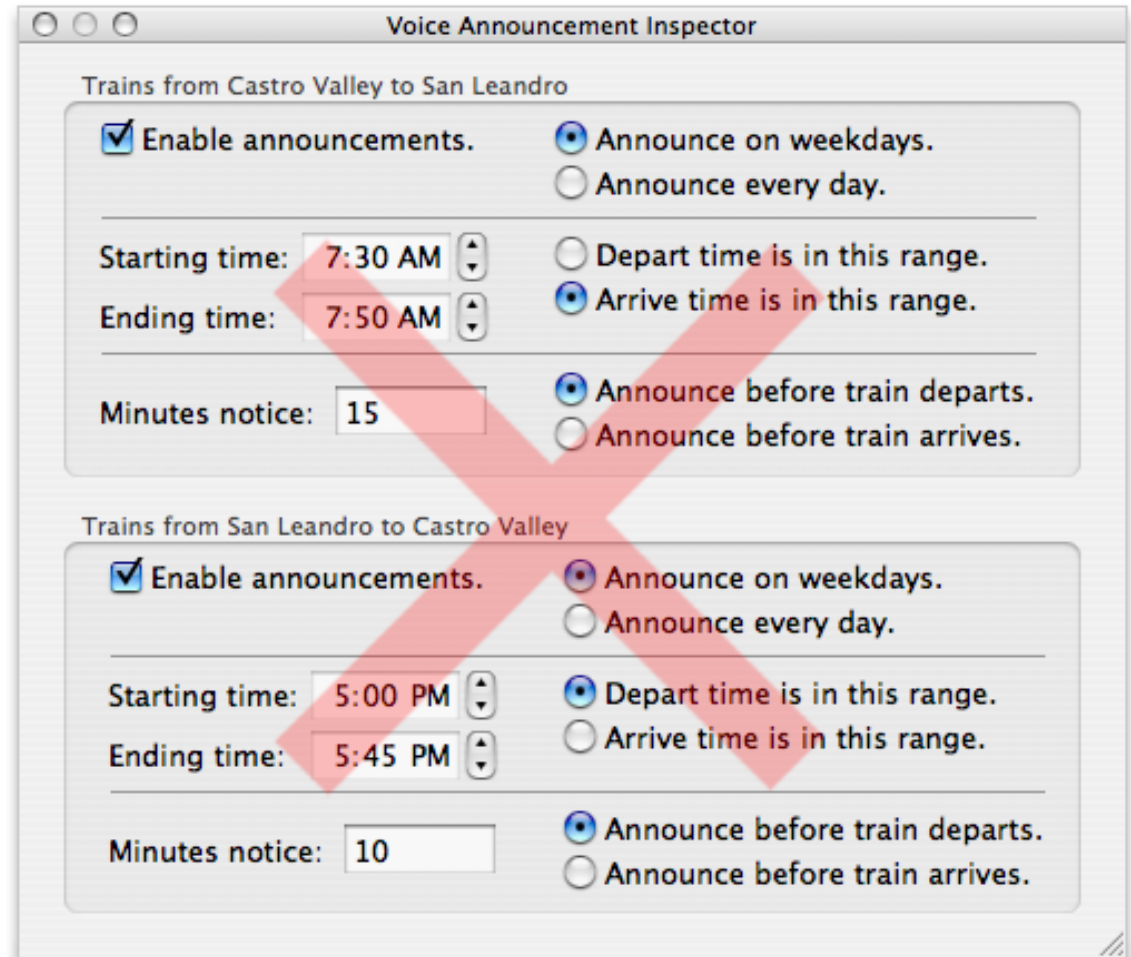
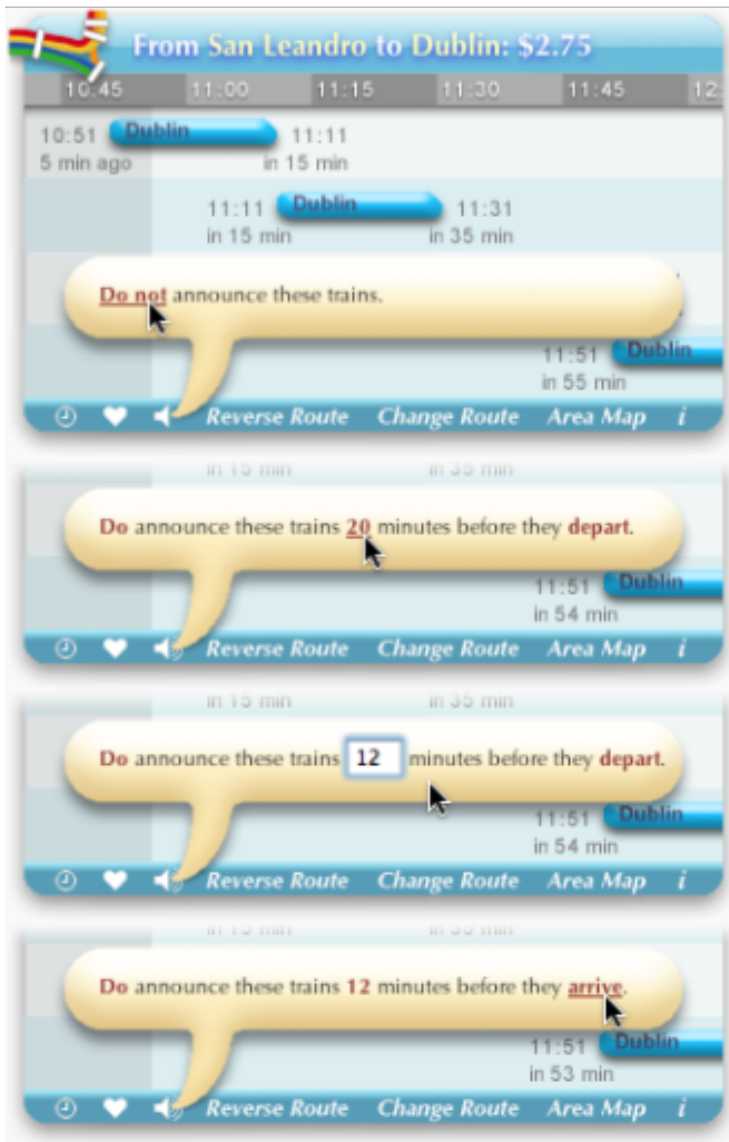
**Right-hand Action Menu (highlighted by a red circle):**

- NEW INVOICE
- Send Invoice
- Edit Invoice
- Print Invoice
- Download as PDF
- Delete Invoice
- Duplicate Invoice
- Receive Payment
- View Invoice as Client
- Add tags

**Easy to use / configure**  
Explain complex features

# Explain complex features (1/4)

Complex features must be explained by an image or a **dynamic sentence**.



← Javascript Tangle lib

## Explain complex features (2/4)

Complex features must be explained by an image or a **dynamic sentence**.

Minimum Stock Rules

xml

list

form

General Information

Name : OP/00005

Product : [PC1] Basic PC

Product UOM : PCE

Locations

Warehouse : OpenERP S.A.

Location : Stock

Quantity Rules

Min Quantity ? : 3.00

Max Quantity ? : 5.00

Qty Multiple ? : 1

Misc

Active ? : ☒

Simulation

Considering you consume [32 PCE] / month, if you want a security stock coverage of [13 Days], which means <16 days> based on forecasted quantities (supplier lead time: <6 days>, customer lead time: <3 days>), you need a minimum stock rule of <16 PCE>.

To buy on average [32 PCE] every [30 days], your maximum stock rule must be <48 PCE> and your stock value will evolve between <1500 EUR> and <3500 EUR>, with an average of <2500 EUR>.

Test Tangle here: <http://worrydream.com/#!/Tangle>

It's impossible to compute good mini/maxi without complex computations !



## Explain complex features (3/4)

Complex features must be explained by **an image** or a dynamic sentence.

The screenshot displays the 'Processor on demand' configuration page in the Open ERP system. The page has a header with the name 'Processor on demand' and a tabbed interface with 'Information', 'Procurement & Locations', 'Suppliers', and 'Descriptions'. The 'Information' tab is active, showing fields for 'Product Type' (Stockable Product), 'Procurement Method' (Make to Stock), and 'Supply method' (Produce). Below these fields is a flow schema diagram showing a sequence of steps: SO007 (laptop icon), PO005 (server icon), IN/001 (hand holding a device icon), and OUT003 (cylinder icon). The flow is indicated by arrows connecting the steps. The 'Base' and 'Status' sections are partially visible on the right.

Name : Processor on demand

Information Procurement & Locations Suppliers Descriptions

Procurement Base

Product Type ? : Stockable Product Cost

Procurement Method ? : Make to Stock

Supply method ? : Produce

SO007 PO005 IN/001 OUT003

Status

When changing a value, it updates the flow schema.

## List of complex features:

- Product Procurement methods
- SO Picking/Invoice methods
- PO Invoice Control
- Minimum Stock Rules
- Push / Pull logistic rules
- Lead Times (product/company)
- Automated Actions
- Traceability
- Others... ?

# Misc Improvements

- OpenERP Online:
  - No distinction between CC and instances (add a “Control Center” button in instances, use same login=their email).
  - Login button on our website
- Documentation of the installation to review
- Do we need shortcuts ?
  - If yes, should be with custom domain/context like “Save as a filter”

# Misc: editable lists

- Editable lists are not good, this is better:
  - One created by default
  - Allows more complex lines

**New Invoice**

Client:  - or - [Add a new client...](#)

Date:

Invoice ID:  Last used: 100

P.O. Number:

| Unit                                 | Qty                               | Description          | Tax | Price                             | Total                               |
|--------------------------------------|-----------------------------------|----------------------|-----|-----------------------------------|-------------------------------------|
| ✖ <input type="text" value="Hours"/> | <input type="text" value="1.00"/> | <input type="text"/> |     | <input type="text" value="0.00"/> | <input type="text" value="\$0.00"/> |

[+ Add New Line](#)

Subtotal: \$0.00

Total Due: \$0.00

Invoice Notes (add any extra details your invoice might require here)

# **Sexy User Interface Ideas**

- Kanban is sexy. To improve:
  - Edit fields in kanban directly to avoid switching to form (same for PAGE view)
  - Use flexible HTML kanban features:
    - SO Lines (subtotals, comment, separators, ...)
    - Mail / Status change history on opportunities (ala LP)
    - some lists can be replaced by kanban, exemple what we did in v6.1

- An invoice form in OpenERP should look like a paper invoice ! (page: perfectly, form: nearly)
- Example: a many2one address field should look this (multi-lines):
  - Chaussée de Namur 40
  - 1367 Grand-Rosière
  - Belgium
- Review O2M Sale Order lines:
  - Inline editing ?

→ Test quickbooks, they are good on this !



# Similar to paper version

**Invoice 100**

Tiny Sprl  
Chaussée de Namur 40  
1367, BW, Grand-Rosière  
Belgium

24 Dec 2011  
Due 08 Jan 2012 (NET 15)

| Qty                   | Unit  | Description | Price    | Total             |
|-----------------------|-------|-------------|----------|-------------------|
| 20.0                  | Hours | Do the job  | \$100.00 | \$2,000.00        |
| <b>Subtotal:</b>      |       |             |          | \$2,000.00        |
| Sales Tax (at 21.0%): |       |             |          | \$420.00          |
| <b>Total Due:</b>     |       |             |          | <b>\$2,420.00</b> |

**Invoice Notes**

thanks.

**History & Comments** [+ Add Comment](#)

**SENT** You sent this invoice to Fabien P. at Tiny Sprl  
24 Dec 2011  
hhkj


**Actions:**

- NEW INVOICE
- \$2,420.00
- Send Invoice
- Edit Invoice
- Print Invoice
- Download as PDF
- Delete Invoice
- Duplicate Invoice
- Receive Payment
- View Invoice as Client

**TAGS** [+ Add tags](#)

This looks like an invoice.

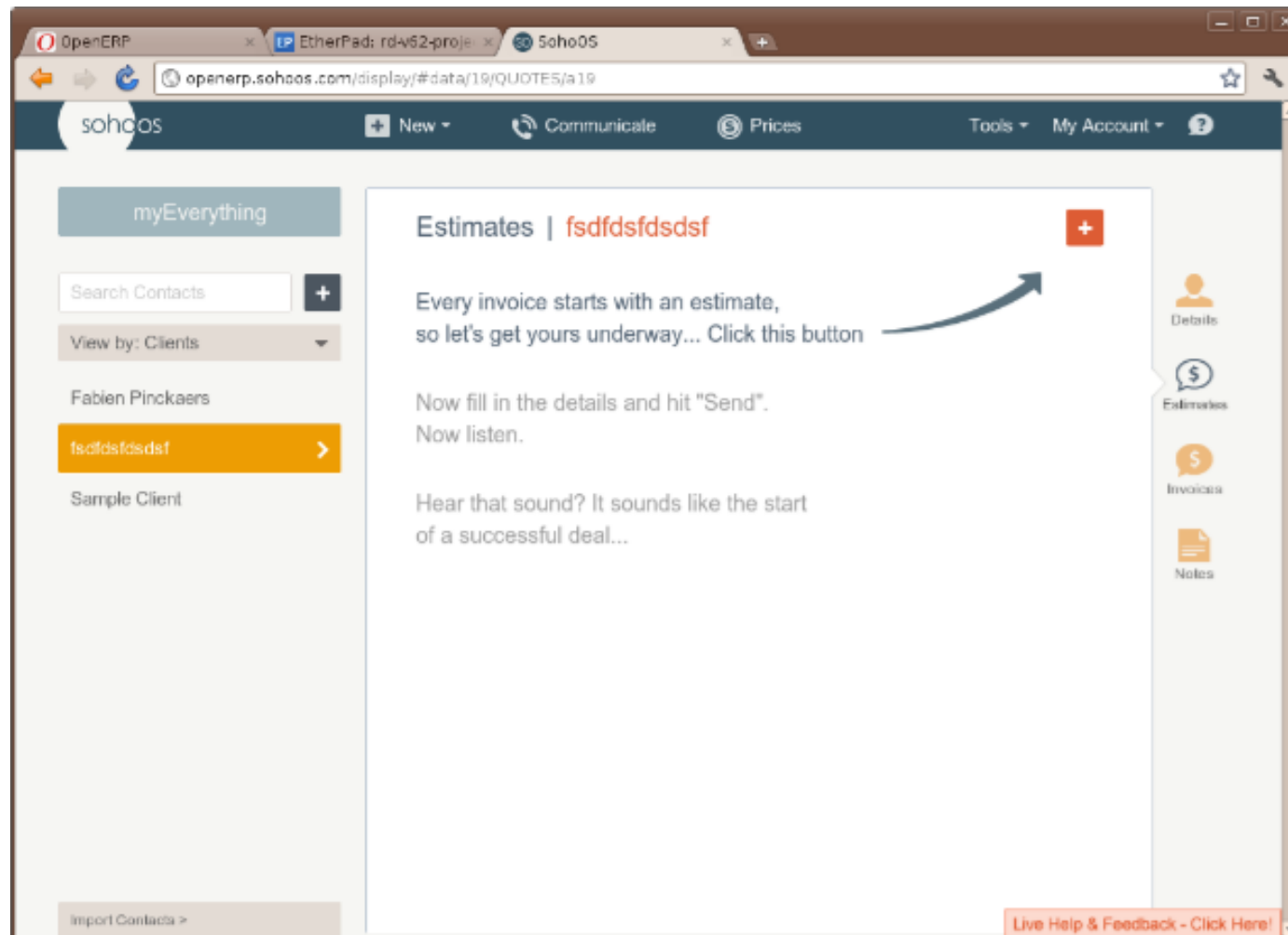
- Should be like a many2one with tags inside.



- Examples:
  - Taxes on invoice lines
    - Will allow many2many in editable lists.
  - Categories on partners

# No Document, cool view

Empty lists must display an instructive message on how to proceed. → good replacement for our current menutips.



- We need a root menu “Reporting” instead of having every application that creates his own reporting menu?
- What about putting all dashboards and reports in a separate applications ?
  - Most users do not use reports & dashboards
  - When you need statistics, you go to dashboard first
  - Most users do groupby in the view they use (Opportunities) instead of going to a separate section "Opportunities Analysis"
- Same for configuration → move all apps configuration to Settings menu?

# Default Search

- Having filters on states that are checked by default (draft, open) is:
  - Good: I don't want to see canceled pickings
  - But confusing:
    - some users click “clear” before searching as it's too complex to think what filter should I add and which one should I remove. → having a “clear” button on our search dialog is not normal, it's a sign of a misconception
    - Some users do not find a document because it was in a search by default

# Default Filters Improvements

- **No pre-set filters on state fields:**

- Remove default filters like “New, Open, Todo” from most list views but display all records
  - Eg: Most “done” delivery orders are on page 2 → so they do not pollute the result. We can display all to avoid misunderstandings (same for invoices, so, ... I don't care too much if there is a cancelled document in the list)
- Keep default filters for Kanban views:
  - I don't want to see Done/Cancelled tasks in my kanban of tasks in a project.
- This would allow to remove the clear button!

- **Keep pre-set filters for unactive/templates:**

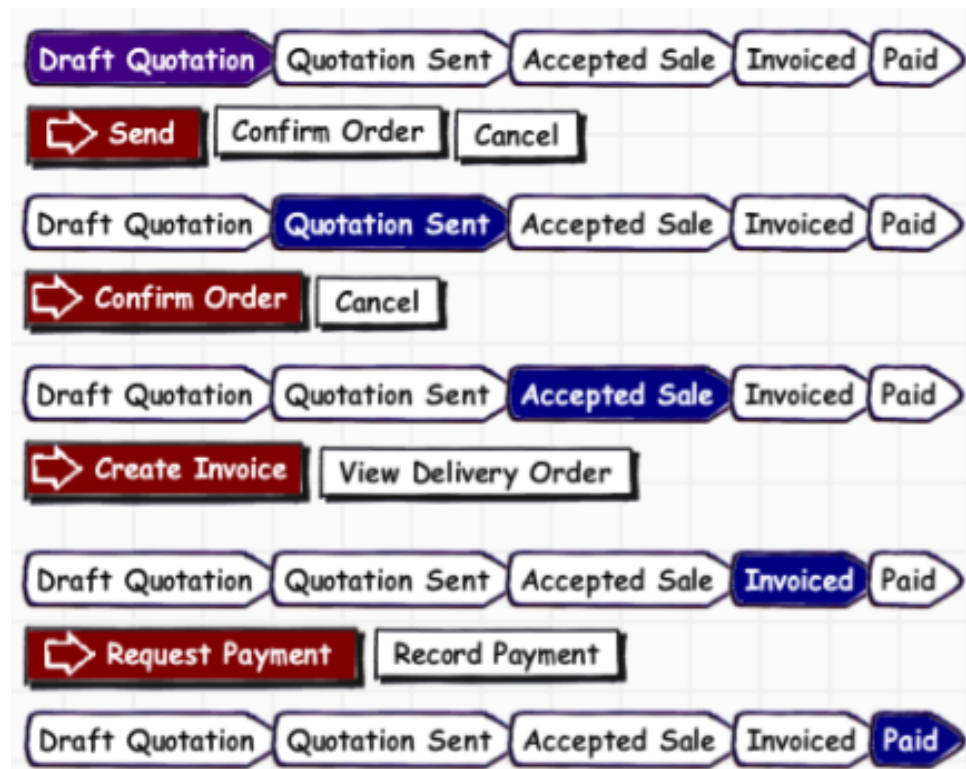
- Keep unactive employees/product/...
- Add filter buttons for “Adding” not “Substracting”: Instead of having “Active” checked by default, add Inactive or “Archive” which is unchecked.

# Better Workflow



# Review main flows

- More business oriented:
  - You do not want to print a quotation → you want to send it to the customer (you may need to print it to do so, or email)
  - Sending a quotation to customer IS a step in the process
  - Done is not clear → Paid is better
- ONE (and only one) button must mark clearly the NEXT action to avoid the user to think (what should I do now?)



- We need to review workflows of:
  - Sale Order
  - Purchase Order
  - Invoices
  - Payments?
  - Timesheet Sheets

- 
- In SO, add an action “Deliver products” (button and state)
- Main features in the same level of menu, example, lead, opportunities, meeting, customers, ...

# Draft of Mockups



## Activities

Customer:

Salesman:



Leads

Customers

Meetings

Opportunities

Sales Orders

Write notes and reminders

Post

> Phone Calls



[SO0009](#) Created for 10.000 €

[Agrolait](#) - 5 hours ago

v Invoicing



Deliveries to Inv

Contracts to Renew

Sales to Invoice

Quotation [SO0009](#) converted to sale order.

Delivery order OUT/001 scheduled for the 7th of february

[Agrolait](#) - 5 hours ago



Received a phone call from Agrolait:

They want to have a meeting with Christine

[Fabien Pinckaers](#) - Dec 26, 2011 20:12

- No dashboard anymore
  - Just a “Wall” ala facebook with latest activities on the sale application
- Global search on top
- Search → Filter
- Header height highly reduced
- No more Reporting & Configuration submenus
  - Reporting as a standalone application
  - Configuration moved to Settings
- No right top toolbar icons (home, preferences)
  - Replaced by a fold menu ala Google.



## Activities

Customer:

Agrolait x

Salesman:



Leads

1

Customers

1

Meetings

Opportunities

0

Sales Orders

7

Write notes and reminders

Post

> Phone Calls



[SO0009](#) Created for 10.000 €

[Agrolait](#) - 5 hours ago

v Invoicing

Deliveries to Inv

Contracts to Renew

1

Sales to Invoice

2



Quotation [SO0009](#) converted to sale order.

Delivery order OUT/001 scheduled for the 7th of february

[Agrolait](#) - 5 hours ago

# It filters on a customer

---

- When you search on customer:
  - It applies to current list view but also on all menus
  - You directly see the number of documents related to this customer: sales orders, contracts to renew, opportunities, ...
- No more “clear” button as there is no more default searches
- A many2one search field has a cross to quickly unfilter on this field



Sales Orders

Draft

Open

Pending

Customer:

Agrolait

x

Reference:

advanced...

Filter

Create

<< < 1/5-56 > >>

↓-> Export

Import

Workflow View

Powered by [OpenERP](#) - Community / Unsupported Version.  
CompanyName DatabaseName v6.1

Management Presentation

# I click on Sale Order

---

- No pencil to edit → go on page view first
- No pre-filters set by default (Open,...)
- Import, Export, Workflow, View Editor → in the bottom as it does not depend on the selection
- No cross to delete → select a record first
- Very identifiable “Create” button
- Less switch view icons → no page, form. Only list/kanban
- No “Group By”, “Extended”, Custom Filters → Everything moved to the advanced folding...
- No Currency column → merged in the price
- Less fields (only 6 columns)

Sales Orders

Draft

Open

Pending

Customer:

Agrolait

x

Reference:

advanced...

Filter

Create

<< < 1/5-56 > >>




- Leads 1
- Customers 1
- Meetings 0
- Opportunities 7
- [Sales Orders](#)
- > Phone Calls
- v Invoicing
- Deliveries to Inv 1
- Contracts to Renew 2
- Sales to Invoice


| <input type="checkbox"/>            | Reference^ | Date       | Customer | Salesman | Total   | State      |
|-------------------------------------|------------|------------|----------|----------|---------|------------|
| <input type="checkbox"/>            | SO0006     | 21/01/2012 | Agrolait | Nicolas  | 34567 € | Quotation  |
| <input checked="" type="checkbox"/> | SO0005     | 12/01/2012 | Agrolait | Nicolas  | 12000 € | To Invoice |
| <input checked="" type="checkbox"/> | SO0002     | 01/01/2012 | Agrolait | Bernard  | 4000 €  | Cancelled  |
| <input type="checkbox"/>            | SO0006     | 21/01/2012 | Agrolait | Nicolas  | 34567 € | Quotation  |
| <input type="checkbox"/>            | SO0005     | 12/01/2012 | Agrolait | Nicolas  | 12000 € | To Invoice |
| <input type="checkbox"/>            | SO0002     | 01/01/2012 | Agrolait | Bernard  | 4000 €  | Quotation  |
| <input type="checkbox"/>            | SO0002     | 01/01/2012 | Agrolait | Bernard  | 4000 €  | Quotation  |


- Edit
- Download as PDF
- Merge Orders
- Delete

- All actions on a record on the same place:
  - Edit, Delete,
  - Print, Merge, ...

Sales Orders

Draft

Open


Pending

Customer:

NewCustomerx

Reference:

advanced...

Filter

Create



- Leads1
- Customers1
- Meetings
- Opportunities2
- Sales Orders0
- > Phone Calls
- v Invoicing
- Deliveries to Inv
- Contracts to Renew0
- Sales to Invoice0



Every sale order starts with a quotation.

Once the quotation is validated, it's automatically converted into a sale order to follow the delivery and invoicing.

Hear that sound? It sounds like the start of a successfull deal...

- Empty lists explains the user what to do.
- We train him.
  - It's probably the first time he goes to this screen



## Sales Orders

&lt;-- back to list

## Create

&lt;&lt; &lt; 1-56 &gt; &gt;&gt;



Send Quotation

Cancel Quotation

Edit

Download as PDF

Duplicate

Delete

Attach File

FileA.png x

## Invoice 100

Tiny Sprl

Chaussée de Namur 40  
1367, BW, Grand-Rosière  
Belgium

24 Dec 2011

Due 08 Jan 2012 (NET 15)

| Qty                   | Unit  | Description | Price    | Total      |
|-----------------------|-------|-------------|----------|------------|
| 20.0                  | Hours | Do the job  | \$100.00 | \$2,000.00 |
| Subtotal:             |       |             |          | \$2,000.00 |
| Sales tax (at 21.0%): |       |             |          | \$420.00   |
| Total Due:            |       |             |          | \$2,420.00 |

## Invoice Notes

thanks.

## History &amp; Comments

+ Add Comment



SENT

You sent this invoice  
to Fabien P. at Tiny Sprl

24 Dec 2011

ihkj



OPENED

Invoice opened

24 Dec 2011

Leads 1  
Customers 1  
Meetings 0  
Opportunities 7  
[Sales Orders](#)

&gt; Phone Calls

v Invoicing

Deliveries to Inv 1  
Contracts to Renew 1  
Sales to Invoice 2

# I click to see a document: page

---

- Separation of the document itself, that looks like a paper doc and extra info (history of changes)
- State progress bar on the top, with better steps
- ← back to list / or search bar?
- Action bar:
  - The next step is highlighted: Send Quotation
  - All action button on the same place





## Sales Orders

Creating...

## Quotation

Quotation Sent Sale Order Invoiced Paid

✓ Save

X Cancel

Reference: SO001

Customer Ref:

Date: / /



Customer: Agrolait ▼

Ordering Contact: ComboBox ▼

Order Lines

Other Information

| Product                            | Taxes | Qty   | Unit Price | Subtotal |
|------------------------------------|-------|-------|------------|----------|
| X PC1: Basic PC - Suprt Product    | 21%   | 3 PCE | 100 €      | 300€     |
| X PC2: Blablalkfjds lkf jdsklfd js | 21%   | 1 Kg  | 200 €      | 200 €    |
| X Product ▼                        | 21% ▼ | 3 PCE | 1500 €     | 4500 €   |
| ✓ extra information                |       |       |            |          |

✚ [Add a line](#)

Subtotal: 5000 €

Taxes: 1000 €

Total: 6000 €

Additional Notes

✓ Save

or [Cancel](#)

- Improvement on the editable list (or editable kanban)?
- No other button than “Save” or “cancel”
- Focus on the “Save” button
- After clicking on “Save”, you are redirected to the next slide



## Sales Orders

&lt;-- back to list

## Create

&lt;&lt; &lt; 1-56 &gt; &gt;&gt;



Send Quotation

Cancel Quotation

Edit

Download as PDF

Duplicate

Delete

Attach File

FileA.png

x

## Invoice 100

Tiny Sprl

Chaussée de Namur 40  
1367, BW, Grand-Rosière  
Belgium

24 Dec 2011

Due 08 Jan 2012 (NET 15)

| Qty                   | Unit  | Description | Price    | Total      |
|-----------------------|-------|-------------|----------|------------|
| 20.0                  | Hours | Do the job  | \$100.00 | \$2,000.00 |
| Subtotal:             |       |             |          | \$2,000.00 |
| Sales tax (at 21.0%): |       |             |          | \$420.00   |
| Total Due:            |       |             |          | \$2,420.00 |

## Invoice Notes

thanks.

## History &amp; Comments

+ Add Comment



SENT

You sent this invoice  
to Fabien P. at Tiny Sprl

24 Dec 2011

ihkj



OPENED

Invoice opened

24 Dec 2011

Leads 1  
Customers 1  
Meetings 0  
Opportunities 7  
[Sales Orders](#)

&gt; Phone Calls

v Invoicing

Deliveries to Inv 1  
Contracts to Renew 2  
Sales to Invoice