



Service Definition for Odoo Finance System



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3. Introduction - Target Integration



Our Mission

To empower curious business owners and managers looking to grow their business, by providing them with business insights which they can leverage to make better, clearer, and more concise business decisions.

About Us

- Established in 2008
- 130+ Digital professionals
- 10 offices in Ireland, the UK, India & the USA
- 4379+ customers worldwide
- 5971+ projects completed
- ISO certified



Some of our work

Finance. Credit Union Development Association - CUDA. Read [here](#).

Manufacturing. Archway Products. Read [here](#).

Distribution. EnviroBuild. Read [here](#).

Energy. Rayal. Read [here](#).

Biotechnology. AMSBIO. Read [here](#).



4. Service Overview

Odoo is a suite of business management software tools including CRM, e-commerce, billing, accounting, manufacturing, warehouse, project management, and inventory management. Odoo out of the box has 80+ apps to manage the daily operations of a business organisation.

Odoo ERP Software is a comprehensive suite for business applications like Purchase, Inventory, CRM, Sales, project management, warehouse management, financial accounting management, and Human resources, Leave management, Time management, and Payroll

Odoo solutions provide businesses, government agencies, and non-profit organisations with easy, flexible, low-cost access to rich functionality for managing all financial, distribution, sales, manufacturing, purchase and service processes

Some of the salient features of Odoo

- Odoo – 100% Web-based ERP System
- Flexible and Fully Integrated
- 30+ applications available
- 8000+ Readily available modules contributed by Odoo community and Third-party
- Highly Extendable, Can add n number of modules and functionalities
- Plug and Play model – Switch off and switch on any modules at any time
- Easy customisation capabilities
- User Friendly
- Integrate with Social media
- The active community working globally to improve the product every day
- Available on the cloud or on-site and are most suited for small to mid-sized companies
- The source code of this platform is available to everyone due to its open-source nature
- With more than a thousand downloads/installations per day, Odoo / Odoo are one of the most used open-source solutions in the world
- It has a dynamic community, is flexible, and can be adapted to your needs
- Odoo Implementation can be immensely beneficial to manage your enterprise as it would aid with all its functions and functionalities. No matter



how big the enterprise would be, Odoo provides with a robust ERP solution that can manage it easily

- With Odoo, we can easily and affordably customise the solution to fit their business requirements with no or minimal programming

Target Integration offers a comprehensive solution for businesses seeking efficient management of operations and finances with Odoo ERP/Accounting Software. Our service entails:

- **Implementation:** We meticulously plan and execute the implementation of Odoo ERP, ensuring a seamless transition tailored to your business requirements. Our team works closely with you to understand your processes, customise Odoo accordingly, and deploy the system effectively.
- **Data Migration:** Our experts facilitate the smooth transfer of your existing data to Odoo, ensuring data integrity and minimal disruption to your operations. We handle the migration process efficiently, ensuring all critical data is accurately transferred and accessible within the Odoo platform.
- **Support and Maintenance:** With Target Integration, you receive ongoing support and maintenance services to ensure the continuous operation of your Odoo system. Our dedicated support team is readily available to address any issues, provide technical assistance, and perform routine maintenance tasks to keep your system running smoothly.
- **Training:** We offer comprehensive training sessions to empower your team with the necessary skills and knowledge to effectively utilise Odoo. Our training programs are tailored to your specific needs and cover various aspects of Odoo functionality, ensuring your team can maximise the benefits of the software.

With Target Integration's holistic approach to Odoo ERP/Accounting Software, you can streamline your operations, enhance financial management, and drive business growth with confidence.



5. Approach to Support and Maintenance

5.1. Support & Maintenance

Target Integration's goals and objectives in establishing a Maintenance & Support structure for the Buyer are as follows:

- Comprehensive, scalable support team to support the day to day support needs of applications and business requirements.
- Establish a work environment that fosters the sharing of knowledge and resources across all applications and leverages an understanding of technical, functional and integration knowledge.
- Establish and maintain end user system knowledge by providing ongoing training and Help Desk support.

5.2. Service Availability

Hours of Operation

The Service Provider's customer support will normally be available from 0900 to 1730hrs Irish standard time, Monday through Friday, except Bank Holidays and Public Holidays.

During this period the team members for your project may not be available, however we do have exceptional support 24 hours a day, 7 days per week where someone will be available to support you. Out of business hours support requests can be submitted online or by e-mail 24x7x365 via your project support email.

In the following table you can see a detailed level of Support depending on the Business Criticality of the issue.

Support Level	Timings
Standard Support	Mon-Fri 0900hrs -1730hrs Weekends & Bank Holidays 0900hrs - 1300hrs



5.3. Modes of Support

Telephonic Support

We can be contacted on **+44 121 285 5684** 24 hours a day, 7 days a week. When your call is received, you will be routed to the appropriate 1st level support representative.

Email Support and Ticketing System

In addition to Telephonic support, users can email us at support@targetintegration.com and ask the support teams questions. There is also a ticketing system which allows users to open and track previous tickets and see updates on on-going requests.

We fortify this support by guaranteeing Service Level Agreements (SLAs) covering Maintenance and Technical Support response times, particularly for critical issues.

The Buyer project team will have the option to open a service request online, update and view the status online, and receive notifications as we work on your service request.

Project Management Platform & Helpdesk

Target Integration uses **our in-house Project Management and Helpdesk platform called My PmStudio**. Client project team will be provided access to it.

Our project management tool allows you to create questions and tasks for our consultants.

The Buyer's support staff will be provided with access to create tickets/ tasks in My PmStudio and will have the authority to select the resource for performing the task. Once our consultants pick up the task, they will reply back to you or create a screen sharing session/support session for you to answer your queries.

Time spent on any task is recorded in My PmStudio and you will have a clear view of how time has been allocated. You can use Email or the intuitive web interface of My PmStudio. Our Project Managers will take you through a training session on My PmStudio at the project outset.

5.4. Levels of Support

Our support responses are categorised by three levels. These are presented below.

Level 1 Support

The services provided in response to a Customer's notification of a suspected issue with the solution proposed. L1 support undertakes the following responsibilities:

- Perform initial issue troubleshooting, isolation, and identification (for example Hardware vs Software fault triage)
- Determine whether a solution is contained in the product, and, as necessary, perform a review of a symptoms-solutions database for known issue resolutions.
- Work with the Customer to resolve single issues or escalate trouble tickets to Level 2 Maintenance Support for a resolution.



- Escalate and manage the progress of trouble resolution through subsequent levels of support.
- Provide updates to the Customer on the status of resolution on a basis agreed to with Customer.
- Notify Customer of the final resolution and verify the issue is resolved before closing the trouble ticket.

Level 2 Support

The services provided to a customer to perform an in-depth analysis of the suspected issue, attempt to recreate the issue, and to provide an acceptable issue resolution. Nearly all issues are resolved at no higher than this level. Level 2 support is also responsible for keeping Level 1 support (and, therefore, the Customer) informed of the status of trouble resolution on a regular basis.

Level 3 Support

Level 3 is the highest escalation point for trouble resolution and other technical support. Level 3 personnel are Target Integration development engineers who specialise in various components of the proposed solution and third party (if any) . Their responsibility is to resolve issues in the proposed products platform that are determined to be, or are highly probable to be, the result of a design or manufacturing defect or the result of a complex interaction between the platform and another product not resolvable by Level 2 Support. They are able to bring their product design engineering knowledge and specialised expertise to bear on the trouble and effect a resolution within an acceptable time period and in accordance with agreed upon SLAs.

6. Recovery Times

SLA Response and Recovery Times are as follows:

Service Requests/Response Times

As some issues/queries are more time critical than the others, and thus respecting the intensity of the queries, please find outlined below the response time as per the query priority level.

The Service Provider will try to resolve all faults as soon as reasonably possible. In general, the following guidelines will be used in prioritising requests:

Priority Level	Target Response Time	Target Resolution Time
High	1 Hour	2 Hours
Normal	2 Hours	4 Hours
Low	4 Hour	2 Days



Priority of the faults will be decided by the Service Provider upon review of the task and will be communicated to the customer at the time of acknowledgement of the receipt of the query. In general any faults with complete loss of service will be considered as High Priority fault and dealt with as quickly as reasonably possible.

Severity Definitions

Severity	Description
1	A production supported system is unavailable to all users or a business-affecting security breach has occurred.
2	A production supported system is unavailable or performance is degraded and in either case a significant number of users and the Institutes' business operations are affected.
3	Any incident which is not deemed severity 1 or severity 2 but which warrants a higher severity than severity 4. This (Sev-3) is the default Incident severity. - Any Incident on a production supported system affecting a single user. - Any Incident relating to non-production supported systems.

7. Contract and Account Management

7.1. Contract Management

Our primary goal is to meet your business objectives of providing support for Odoo ERP or Finance System that would help Buyer in smooth business process. We are providing an effective contract management that would keep a tab on communication, tracking, change control, tasks and assess the performance of the new solution. A dedicated key account manager will liaise directly with the Buyer on all issues relating to the service. In the case where the key account manager is unavailable, we will assign a deputy account manager in his absence.

Our Approach

Our approach to ensuring the quality of Services is to::

- understand your objectives/perspective
- deliver the best, most practical, and solution-focused advice.



- deliver a coordinated, reliable, and supervised service, underpinned by best-practices and procedures
- have the right people, in terms of experience/expertise, carrying out the work, and
- carry out work in an effective and efficient manner which provides the greatest value for money.
- Our extensive experience of delivering services to public bodies means that we can do this with great certainty and efficiency and quality.

Account Manager Role in Quality

The Account Manager will have overall responsibility for ensuring that high quality, cost-efficient Implementation of the Odoo ERP or Finance System to Buyer. They will endeavour to ensure that a good working relationship always exists between Target Integration and Buyer, focusing on clear account management procedures, including:

- High levels of communication
- The provision of skilled personnel at the appropriate level
- Feedback
- Early identification of deviations from plans
- Continuous improvement across all elements of the service delivery, including cost.

The Account Manager will ensure that there is on-going monitoring of Target Integration's performance and the quality of services delivered to Buyer. This monitoring process will be achieved by measuring the services actually delivered to Buyer against agreed commitments.

In order to enable Buyer to measure the standard of the services supplied against the KPIs, Target Integration will provide Buyer with regular, high-level account management updates on progress Buyer is at all times aware. These account management updates will include:

Monthly progress reports in respect of actions taken during the previous on behalf of Buyer in respect of all active cases.

Quarterly interim status reports which will contain comprehensive details regarding progress since the last report, planned activities over the coming period, issues and difficulties, together with proposed resolutions, milestones and key dates for planned actions, review of agreed performance and contract management milestones and review of fees and outlay procedures. These reports will form the basis for monthly review meetings.



Monthly review meetings with the Buyer team in relation to the Implementation of Time and Attendance System services supplied since the last meeting held.

In addition to the above, Target Integration recognises that not only must we understand the immediate requirements of Buyer but we must also pre-empt the needs and expectations of Buyer. Through the continuous performance monitoring process and feedback from Buyer, Target Integration will seek to ensure that

- Its service represents a high quality Implementation of is delivered to Buyer
- Its services represents value for money to Buyer at all times.

Project Management

Target Integration's project management & service delivery methodology for the provision of Implementation of Time and Attendance System services has been carefully tailored to meet the needs of our Clients. It sets out the manner in which we will collectively provide advice to Clients on a day-to-day, case by case basis.

Resource Management

We have proposed a core team for this engagement. The team is led by a senior member of our team who manages a team of subject matter experts. Responsibility for the quality of service resides with the senior member who ensures that their team is adequately staffed and delivers consistent levels of quality. The Account Manager can add resources from outside the core teams should the need arise.

Responsiveness and methods to achieve response time targets

Target Integration recognises that Buyer requires a flexible and responsive service. We aim to respond to all communication / requests for advice as quickly as possible. The Contract Manager will be aware of and monitor all requests. Each request has an associated response time as will be agreed with Buyer. Thereafter, the team members will progress and ensure that the request is responded to on time.

Performance Tracking and Reporting

Target Integration's project management methodology ensures that all issues are tracked from instruction right through to completion, with associated timings agreed. Target Integration will seek to provide Buyer with regular, high-level updates on current matters so that they are at all times appraised of matter progression. We employ Monthly Contract Review Meetings, Interim Status Reports and Cost Estimates as a matter of course.



Target Integration has a range of reporting mechanisms to deal with specific matters such as conflict check, Initial Reports for new instructions, status/final reports and annual reports..

Business continuity and disaster recovery plans

Target Integration's Business Continuity and Disaster Recovery Plans have been designed to minimise the likelihood and impact of interruptions to business for our clients.

We undertake stringent measures to protect the confidentiality and security of our clients' documents. When not in use, client files are kept within fire and flood resistant cabinets. Security and other original client documents are held in secure, limited access, storage facilities. The floors to our offices can be accessed only by way of individual electronic access cards.

Business continuity is an ongoing discipline and our plans and infrastructure are regularly reviewed, developed and refined. In the unlikely event of there being a major incident or disaster for a sustained period of time that involves the loss of use of any of our offices, the plan is implemented immediately.

Operational risk framework

Our quality control program is designed around a 3 lines of defence framework. The first line of defence we have in place is the quality checking that takes place. This is conducted through the use of the following methods:

- our case management system with bespoke processes in relation to certain actions
- checklists
- supervision within teams
- Sign off documents by Target Integration providing a further first line of defence.

The second line of defence we utilise is a peer review auditing framework for particular types of transaction. This will be put in place for Buyer for transactions of an agreed scope. It will include:

- file reviews and audits
- individual sampling
- internal benchmarking of client service teams
- data on active matters, including a review of compliance with timescales for key actions and checklists



Our third line of defence is where an objective view is taken. We achieve this by using the following methods:

- If issues of concern are identified as part of the above described peer review, they will be referred to the Risk Partner and/or Director of Risk & Compliance who will review and determine what action is appropriate, if any
- client feedback
- post transactional reviews
- client audits
- client service reviews
- client satisfaction surveys/interviews

The information gathered using these methods is used to continuously improve our service delivery. We continue to evolve our approach to quality control and assurance.

Issues, Query & Complaint Management

Buyer issues and queries are managed through a multi-level support structure, with escalation if required. This structure currently supports our large client base with requirements very much in line with those of Buyer. Our Contract Manager will maintain ownership of this process so that all queries whether related to service delivery, account management or other issues are recorded, tracked and managed. Target Integration believes that successful client relations are based on good communication. Where a client believes that there is cause for complaint, we will endeavour to immediately correct the problem and restore goodwill. Target Integration prides itself on excellent service and will ensure that any complaints are resolved in a timely manner. Where complaints do occur, we recognise that there are lessons to be learned and this knowledge is incorporated into improved client account management. Issues and complaints offer us an opportunity to correct immediate problems. Complaints can also provide constructive ideas for improving our contract management.

Target Integration's complaints handling process is based on best practices to classify, analyse, action and learn from client complaints.

Third-Party Dispute Resolution Mechanism

If complaints cannot be resolved directly between Target Integration and Buyer, they will be referred to a third party for resolution. We will of course comply with the dispute resolution approach in the contract. We would also be open to agreeing with



you other dispute resolution mechanisms which you Buyer might wish to apply in relation to a specific dispute, such as expert determination or conciliation.

Third-party dispute resolution is advantageous to both Target Integration and Buyer because it enables expeditious, economical and fair complaint resolution .

Continuous Improvement

Target Integration places great store on creating differentiation for our clients through innovation. This carries through our customer service where it is manifested in our continuous improvement approach. To allow continual improvement, we determine the requirements for the monitoring, measuring and analysis of our service delivery processes, and implement necessary corrective or preventive actions and improvements.

- Coordination with other Advisory & Client Teams
- Our team is drawn from a variety of disciplines across the firm and has been selected for their experience in working in collaborative client environments and with either internal or third-party advisory teams.
- Target Integration will meet the requirement to deliver excellent coordination skills when working with other advisory teams and the client by:
 - Establishing peer working relationships.
 - Establishing clear lines of communication, demarcation of tasks and project responsibilities.
 - Establishing procedures for management of documentation and project collateral
 - Proactively taking ownership of issue resolution where this benefits the overall project through the Project Lead.
 - Proactively fostering trust and positive working relationships.

Performance Measurement and Management

Target Integration uses Key Performance Indicators (KPI) to measure the quality of service delivery, in compliance with our Quality Management System. We are experienced in meeting and exceeding performance expectations, managed through our rigorous KPI monitoring, reporting and action plans. We work hard to continually improve our performance against these metrics so that customers can be assured of consistently high-quality service delivery.

During transition Target Integration will work with Buyer to design, agree, and implement a detailed Service Level Agreement (SLA) which will clearly define the



service standards required. Once agreed, the SLA will be formally documented and form the basis on which Target Integration’s performance will be measured. We note the metrics and initiatives identified within the scope of services and look forward to developing and agreeing upon these with Buyer.

These standards and metrics will be used to measure performance and progress against the key contract requirements. The metrics will be collated, analysed, and subsequently reported back to Buyer on an agreed schedule, including at regularly-scheduled meetings. At these meetings, we will discuss current performance levels, any customer concerns, and opportunities for continuous improvement. We will also regularly assess the value of each KPI to ensure we capture the most relevant information as the contract evolves.

Target Integration will track, monitor, and report on our performance against agreed KPIs. To do so, we use a traffic light system.

1. Green Scores - Service delivery meets expectations.
2. Amber Scores - Service delivery is tolerable. In the case of 2 consecutive Amber scores, a Corrective Action Report (CAR) is required
3. Red Scores - A CAR must immediately be agreed with the Buyer Representative.

The implementation of the CAR is tracked by the Target Integration Project manager and Buyer Project Manager

The metrics/KPI are tracked on site level and consolidated, ensuring high visibility and prompt escalation of service issues remain unresolved. From our past experience, the quality of service delivery is first measured using 10 to 20 metrics. The metrics are intended to provide the Buyer with a level of comfort: measure the delivery of what is promised and ensure proper escalation.

We will also regularly assess the value of each KPI to ensure we capture the most relevant information as the contract evolves.

Below are some of the KPIs which Target Integration standardly employs to measure our performance and promote continuous service improvement.

Critical Success Factors	Objective	Performance Indicator	Measured
Customer Satisfaction	Buyer stakeholders to be surveyed and Target	Trend graph and survey results	Monthly



	Integration to achieve an overall satisfaction score of 85% or greater.		
Customer Communications	To ensure prompt response to customer queries. All queries acknowledged and responded to within 24 hours	Call logs maintained and response times tracked against levels agreed with Buyer	Weekly/Daily
Service innovations and improvements	To demonstrate service innovation, efficiencies, and added value options	Three new ideas presented at the quarterly meetings	Weekly
Health and Safety	Full compliance with all legislative requirements and Buyer standards	Internal and External audits of H&S procedures and compliance.	100%
Management Reporting	Provide timely and relevant management information to monitor performance and identify risks and areas for improvement	Regular provision of Management information to schedule agreed with Buyer Agreed monthly, quarterly and annual reports.	Regular Intervals

7.2. Escalation Process

Escalation Policies and Procedures

When a customer has a case that's business-critical and requires a faster resolution, we provide the best in class support for identifying the escalation and providing closure to the escalation without affecting the integrity of the business process.



Any person in the following positions can request the escalation of a case with Target Integration Support

- Primary case owner
- Customer Development, Testing and QC team
- Customer success Manager
- Support Manager

Requesting an Escalation:

There are two ways to request an escalation on a support case:

By Phone:

Customers needing to request an escalation can call the Target Integration board line:

UK - +44 121 285 5684 or by calling your Account Manager or Operations Manager at Target Integration on their respective mobile phones (details in section 10.2.2 below)

By Email:

Customers can request an escalation via email by sending emails to support@targetintegration.com. This will create a ticket in our ticket/project management tool And it will assigned to the respective project manager for his immediate call for action.

Via My PmStudio Ticketing System:

1. Login to MyPM Studio.
 2. Select Project Menu and Search for the Project Name on the Projects page
 3. Select Create Issue to create a ticket with description and attachments (if any)
 4. Assign the case owner
- Select the severity

At Target Integration, we follow the below process for any kind of projects that we are engaged in:

1. Request :
 1. The customer identifies a need to escalate an incident
 2. The customer contacts Target Integration support either by phone or email or creates a ticket and assigns it to the case owner directly.
2. Identification:
 - The case owner and reporting manager will review the request and perform a detailed analysis of the case
 - Within 60 minutes (during standard business hours from 8 AM to 5 PM Irish Standard Time) of receiving the escalation request, the reporting manager follows up with the customer either by phone or case comments.
 - The Reporting manager and the customer discuss the potential diagnostic and resolution paths, and establish expectations.
3. Resolution Cycle:



- The reporting manager and developer will work towards a resolution.
- The reporting manager regularly communicates progress and status to customer and other stakeholders (if necessary).

4. Closure:

- The reporting manager and client agree on the resolution status.
- The reporting manager communicates closure accordingly.

Note: Severity 1 case escalations will be reviewed, and responses will be provided during non-business hours. All other escalations will be handled during regular business hours.

7.3. Handling of Escalation

Open Escalation:

Once it has been agreed to escalate the case, we will flag the case as escalated so that the Product Specialists will easily know about the escalation status of the case. Other backend statuses will be used to help track issue progression.

Throughout the resolution process, the Support Manager or case owner will communicate updates accordingly to the following parties:

Customer:

- The primary contact on the case
- Other contacts who have been added to the case
- Management or executive level (If required)

Target Integration:

- TI Support Management
- Reporting Manager
- Project Team
- Any other TI resource involved in the case resolution (If required)

Closed Escalation

As the Target Integration Support team works to bring closure to the case, once the resolution has been attained, the escalation will be marked as closed. Closure or resolution of an escalated case is decided in a common agreement between the customer and the reporting manager. A closed escalation may be defined by one of the following:

1. Identification of the root cause
2. Established timeline for issue resolution
3. Fully deployed permanent fix

Once the escalation is declared closed or resolved, the reporting manager or case owner will send a final communication summarising the issue and its resolution.

