

# EV HUB: Order-to-Delivery-to-Invoicing Procedure

*How an order moves through Odoo: intake, assignment, planning, production, delivery and invoicing*

## 1. Process Map (Summary)

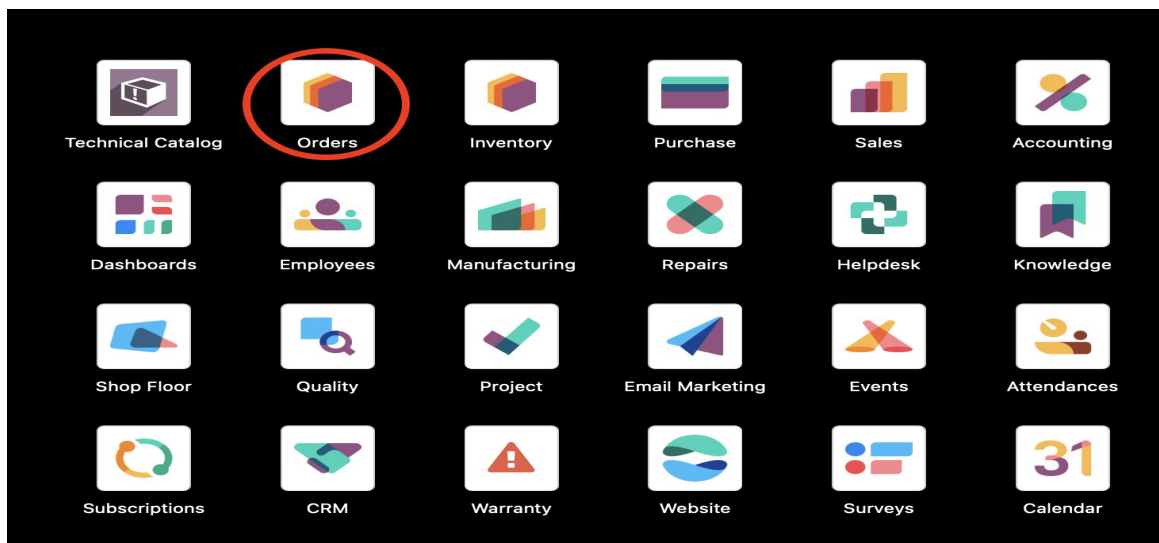
Every order lives in its own dedicated "Orders" app on the Odoo home screen, a separate tile from the general "Helpdesk" app (which is used only for Technical Support, Claims & Warranty, Parts Inquiry, etc.). Staff should always open Orders through this dedicated app, never through Helpdesk. Behind the scenes an "Order" is technically stored as a Helpdesk-model order (this only matters for IT/admin reference, see the Appendix) day to day, all intake, assignment, stock check, planning/delivery date, manufacturing, sales order, delivery and invoicing happens from that one record inside the Orders app.

1. Order arrives. by email (forwarded into the Orders app) or via the web order form. A record is created automatically in the Orders app.
2. Zoran and Emelie are notified (as followers on every new order).
3. Reply-time rule, orders received before 12:00 get a same-day reply with a delivery time (or a note that the part is unavailable); orders received after 12:00 are answered the next day.
4. Assignment: for **new form orders**, Odoo automatically tags the order by department and adds the department lead as a follower. For email orders, Zoran or Emelie set "Assigned to" and "Tags" by hand. In both cases, a person must still click "Assigned to" to take ownership, this is what moves the order to "In Progress" (see Section 4.3).
5. The department lead opens the order and creates a Planning entry directly from it this can post the planned delivery date to the customer once published (Section 6).
6. If the part is not in stock, the lead creates a Manufacturing Order from the order (Section 7).
7. When the part is ready, the lead creates the Sales Order and/or Delivery Order with order data, and notifies the customer (Section 8).
8. If the customer is KG Knutsson / KGK Norway, Emelie separately e-mails [henning.asak@autoexperten.no](mailto:henning.asak@autoexperten.no) and [anouar.essadiki@autoexperten.no](mailto:anouar.essadiki@autoexperten.no) so they can arrange pickup/transport (Section 9), this is a manual step; nothing in Odoo sends this automatically.
9. The lead finalizes the Delivery Order (with the part's serial/lot number) and the invoice; Emelie tracks invoicing and prices across all orders (Section 10).

## 2. Order Intake

Two intake channels feed the same Orders app:

- Email: orders sent to the mailbox are turned into a new record in the Orders app automatically. In the system this arrives on the alias [orders@evhub.odoo.com](mailto:orders@evhub.odoo.com); if your team sends orders to [orders@evhub.no](mailto:orders@evhub.no), that address needs to be confirmed as forwarding into this mailbox (see the note below) the order, and everything described in this document, only exists once the message lands as a record in the Orders app.
- Web order form: a structured order form posts its lines (SKU, quantity, price) directly onto a new order. Odoo then automatically looks up each part's stock availability and category, and runs the auto-tagging/auto-follower logic described in Section 4.



### 3. Where to see all Orders

Click the "Orders" app tile (Fig. 1) → the list view. Every order is a row here.

| ID               | Date               | Customer                                         | Name                                           | Department                | Assigned to        | Stage       |
|------------------|--------------------|--------------------------------------------------|------------------------------------------------|---------------------------|--------------------|-------------|
| New (0)          |                    |                                                  |                                                |                           |                    |             |
| In Progress (26) |                    |                                                  |                                                |                           |                    |             |
| 00634            | Sep 5 at 9:20 PM   | KG Knutsson AB, Zoran - TEST                     | TEST Internal Ticket - Automation Verification |                           | Igor Majeron       | In Progress |
| 00632            | Sep 5 at 7:54 PM   | KG Knutsson AB, Zoran - TEST                     | Order — KG Knutsson AB                         | HV Battery                | Zoran Temelkovski  | In Progress |
| 00631            | Sep 5 at 7:50 PM   | Zoran Temelkovski                                | Order — Zoran Temelkovski                      | HV Parts                  | Zoran Temelkovski  | In Progress |
| 00630            | Sep 4 at 1:34 PM   | Alliance Automotive Services B.V., Joris Kuipers | DC01 PO:4524020505                             |                           | Kevan Qureshi      | In Progress |
| 00629            | Sep 4 at 1:12 PM   | Kgk Norge AS, Roar Lensebakken                   | Bestilling 1007786261                          |                           | Jedzrej Frackowiak | In Progress |
| 00626            | Sep 3 at 9:13 AM   | Kgk Norge AS                                     | innkjepsordre EV HUB orders@evhub.no 10170299  | HV Parts                  | Igor Majeron       | In Progress |
| 00606            | Sep 1 at 7:37 AM   | KG Knutsson AB, KG Knutsson AB - orders          | KG Knutsson order 10170041                     | AC Compressor DU HV Parts | Koray Oztuzun      | In Progress |
| 00594            | Aug 25 at 9:06 AM  | Kgk Norge AS, Roar Lensebakken                   | Siv: Ordrenummer 1007742620                    | HV Battery                | Yamen Kajah        | In Progress |
| 00589            | Aug 18 at 8:40 AM  | KG Knutsson AB                                   | KG Knutsson order 10168925                     | AC Compressor DU HV Parts | Zoran Temelkovski  | In Progress |
| 00588            | Aug 13 at 2:06 PM  | Kgk Norge AS                                     | innkjepsordre EV HUB orders@evhub.no 10168660  | DU                        | Jedzrej Frackowiak | In Progress |
| 00583            | Aug 11 at 4:00 PM  | Kgk Norge AS                                     | innkjepsordre EV HUB orders@evhub.no 80031406  | HV Battery                | Yamen Kajah        | In Progress |
| 00560            | Aug 4 at 2:40 PM   | Alliance Automotive Services B.V., Joris Kuipers | PO: 4523778549                                 | AC Compressor DU HV Parts | Zoran Temelkovski  | In Progress |
| 00458            | Jun 30 at 12:00 PM | Kgk Norge AS, donotreply@kgk.no                  | innkjepsordre EV HUB orders@evhub.no 80030632  | HV Battery                | Yamen Kajah        | In Progress |
| 00444            | Jun 16 at 9:31 AM  | KG Knutsson AB                                   | KG Knutsson order 10164573                     | DU Steering Rack          | Zoran Temelkovski  | In Progress |
| 00442            | Jun 12 at 12:17 PM | Kgk Norge AS, donotreply@kgk.no                  | innkjepsordre EV HUB orders@evhub.no 10164385  | DU                        | Zoran Temelkovski  | In Progress |
| 00440            | Jun 10 at 12:50 PM | Kgk Norge AS, donotreply@kgk.no                  | innkjepsordre EV HUB orders@evhub.no 10164197  | HV Parts                  | Zoran Temelkovski  | In Progress |
| 00436            | Jun 8 at 10:20 AM  | KG Knutsson AB                                   | KG Knutsson order 10163905                     | AC Compressor DU HV Parts | Zoran Temelkovski  | In Progress |
| 00435            | Jun 5 at 12:00 PM  | Kgk Norge AS, donotreply@kgk.no                  | innkjepsordre EV HUB orders@evhub.no 80030176  | HV Battery                | Yamen Kajah        | In Progress |
| 00426            | Jun 2 at 9:39 AM   | KG Knutsson AB                                   | KG Knutsson order 10163418                     | Software                  | Kevan Qureshi      | In Progress |

Fig. 2: Orders list (opened from the Orders app). "Department" (1) shows the Tag(s): HV Battery, Drive Units (DU), HV Parts, Steering Rack, AC Compressor, Software. "Assigned to" (2) shows who owns the order. Compare this against the department-leads table in Section 4 to spot anything mis-assigned.

## 4. Assignment Logic, what Odoo Does Automatically, and What a Person Must Still Do

### 4.1 Automatic part: tagging and "watching" (form orders only)

When an order is created in the Orders app with order lines attached (i.e. it came through the web order form), Odoo automatically:

- Looks up each ordered part number in stock and writes an availability line (OK / SHORTAGE / NOT FOUND) into the order's "Order Lines" tab.

- Adds the matching department Tag(s) to the order, based on the product's category.
- Adds the correct department lead (Zoran and Emelie, on every order) as a follower of the order, so they get notified by email/Odoo even before anyone assigns the order to them.

This mapping of category → department lead is stored in one place (a configuration parameter) and currently matches exactly the list your team gave us:

| Department       | Lead               |
|------------------|--------------------|
| HV Battery       | Yamen Kajah        |
| Drive Units (DU) | Jedrzej Frackowiak |
| HV Parts         | Igor Majeron       |
| Steering Rack    | Koray Oztuzun      |
| AC Compressor    | Koray Oztuzun      |
| Software         | Kevan Qureshi      |

## 4.2 The 12:00 reply-time rule is a team policy, not an Odoo setting

## 4.3 Taking ownership ("Assigned to") is always a manual click

Auto-tagging only adds the lead as a follower (a watcher). It does not put their name in the "Assigned to" field. An order only moves from stage "New" to "In Progress" once a person is actually put in "Assigned to"; for an email order this also has to be typed in by Zoran or Emelie together with the Tags.

## 5. Opening the Order and Reviewing the Order Lines

Click into an order from the list (Fig. 2) to see the full order.

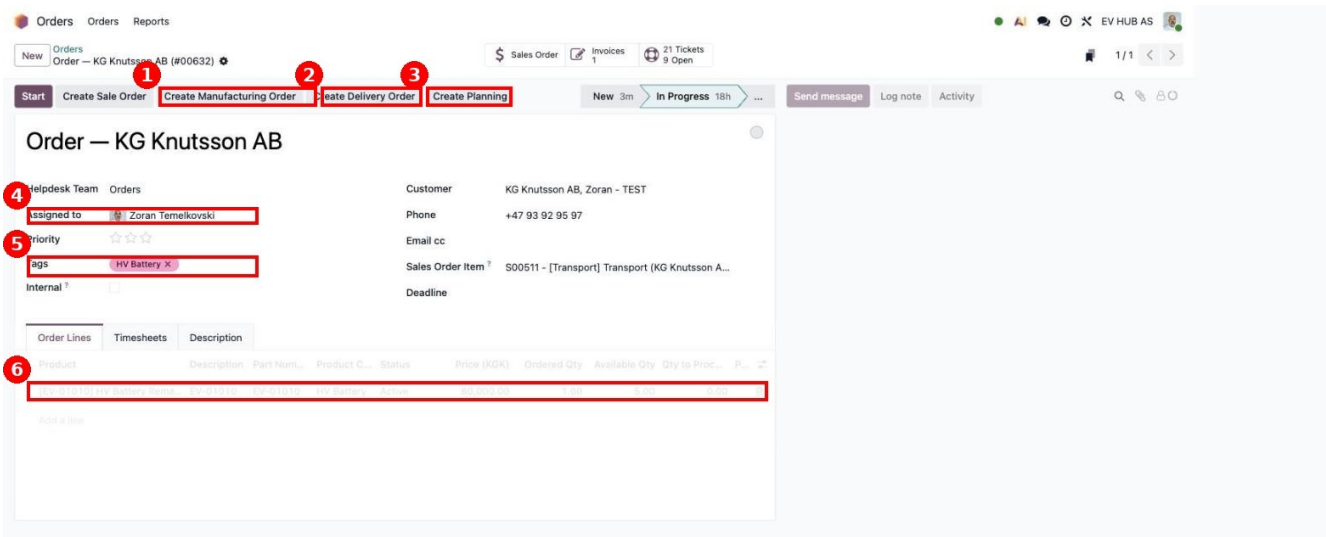


Fig. 3: An open order, viewed from the Orders app. (1) Create Manufacturing Order. (2) Create Delivery Order, Battery-only, see Section 8.3. (3) Create Planning. (4) Assigned to. (5) Tags (department). (6) Order Lines tab: each part, its price, ordered quantity, available quantity and how much of it is being processed. The Create Sale Order button and the Sales Order/Invoices smart buttons are visible but not reliable yet, see Section 8.1.

- Product / Part Number / Product Category: identifies the part and which department it belongs to.
- Status, Price (KGK), Ordered Qty, Available Qty: the automatic stock check described in Section 4.1.
- Qty to Process: set this to the quantity you are acting on before using any of the four buttons in Sections 6–8; the buttons only pick up lines where this is greater than zero.

- Part for Delivery: used only for HV Batteries already invoiced to KGK but still sitting in EV HUB's own stock; tick this before using "Create Delivery Order" (Section 8.3) to confirm that battery has shipped.

## 6. Planning: Setting and Communicating the Delivery Date

From the order, click "Create Planning" (button 3 in Fig. 3). This opens a new Planning entry already linked back to this order.

Fig. 4: A Planning entry linked to an order. (1) "Notify Customer" checkbox. (2) Draft → Published status. (3) Send / Reset to Draft.

Fill in the planned Date (start/end) for the work, then:

1. Simply saving the entry logs an internal note on the order ("Planning shift created by ..."). This is NOT visible to the customer.
2. To actually notify the customer of the planned delivery date, as described in your process, two things both need to happen on this Planning entry: tick "Notify Customer" (1), and set the entry to Published (2) using the status bar or the "Send" button (3).
3. Once published with Notify Customer ticked, Odoo automatically posts a message on the order addressed to the customer: "Your order has been scheduled. Planned completion / delivery date: <date>".

**Note:** If a lead creates the Planning entry but forgets to tick "Notify Customer" and Publish it, the customer will NOT be told the planned date automatically; only an internal note is left. This is the one place in the flow worth double-checking if a customer says they were never told a delivery date.

## 7. Manufacturing Order (when the part is not in stock)

If the Order Lines (Fig. 3) show a part as SHORTAGE, the department lead clicks "Create Manufacturing Order" (button 1 in Fig. 3) for the line(s) with Qty to Process filled in.

- Odoo creates a Manufacturing Order for the needed quantity, using that product's Bill of Materials if one exists, and links it back to the order ("Manufacturing Order(s) created: ..." is posted as a note).
- The lead schedules and works this Manufacturing Order per their normal daily production tasks (Manufacturing app).
- When the Manufacturing Order is completed (the part is physically ready), that is the trigger for Section 8 below.

## 8. Sale Order, Notifying the Customer the Part is Ready, and Delivery

### 8.1 Create the Sale Order

Click "Create Sale Order" for the line(s) ready to be sold, at the agreed price. This should create a Sale Order for the customer with those lines, linked back to the order. This action and the resulting Sale Order/Invoices smart buttons on the order are not working reliably yet, this is being corrected in Odoo. Until then, create and confirm the Sale Order directly from the Sales app instead.

### 8.2 Notify the customer the part is ready

This is a manual step: send the customer a message (e.g. "Send message" on the order, or directly) confirming the part is ready and delivery/pickup can be arranged. There is no automatic "part ready" e-mail in the current setup. The automatic notification described in Section 6 only covers the planned/scheduled date, not the ready-for-delivery moment.

### 8.3 Create the Delivery Order

For most parts, the delivery happens directly from the Sale Order in the Sales app, not from the ticket. Once the Sale Order is confirmed (Section 8.1):

1. Click "Delivery" on the Sale Order (Fig. 5) to open the linked Delivery Order.



Fig. 5: Sale Order, confirmed. Click "Delivery" (1) to open the linked Delivery Order.

2. On the Delivery Order, click "Details" on the product line (Fig. 6).

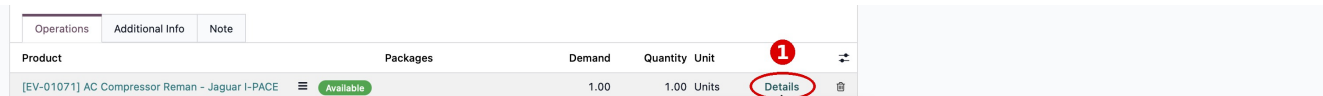


Fig. 6: Delivery Order. Click "Details" (1) on the product line to set its serial/lot number.

3. In the Detailed Operations window, confirm "Pick From" shows the correct serial/lot number for the unit going to this customer (Fig. 7), then Save.

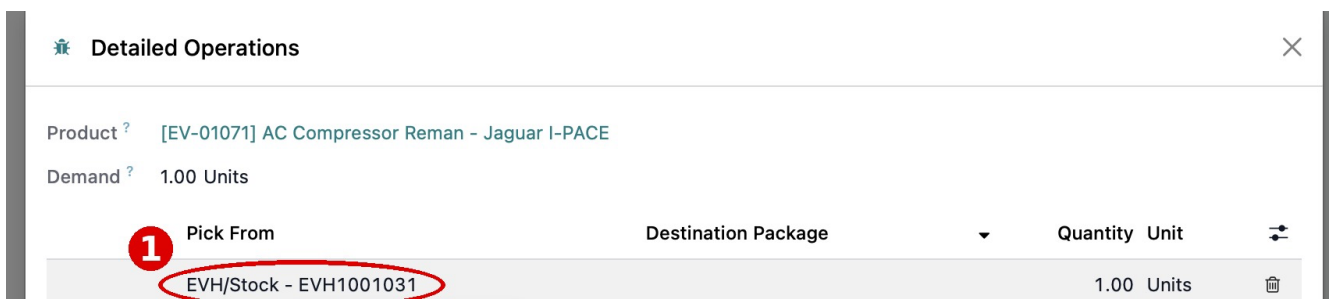


Fig. 7: Detailed Operations. "Pick From" (1) shows the exact serial-numbered unit being picked for this delivery; confirm it matches the unit for this customer, then Save.

Validating the Delivery Order then confirms that specific part, by that serial number, is going out to that customer. This must be done before the order is invoiced (Section 10).

- "Part for Delivery" on the Order and the "Create Delivery Order" button are used only for HV Batteries: a battery that is ready and already invoiced to KGK, but still physically sitting in EV HUB's own stock.
- Ticking "Part for Delivery" and validating the resulting Delivery Order confirms the battery has now actually been shipped and removes it from the EVHUB/KGK/Stock inventory location.

## 9. KG Knutsson / KGK Norway Notifying

**Note:** We checked for any automated e-mail or automation rule tied to KG Knutsson/KGK Norway orders and to the addresses [henning.asak@autoexperten.no](mailto:henning.asak@autoexperten.no) / [anouar.essadiki@autoexperten.no](mailto:anouar.essadiki@autoexperten.no). None exists in the system. This notification is entirely manual today. When an order for KG Knutsson AB / Kgk Norge AS is ready, Emelie needs to send this e-mail herself (mentioning the order/order number) so Autoexperten can arrange pickup and transport. If this should happen automatically going forward, we can add a one-click "Notify Autoexperten" action on the order, or an automation that fires when the order's customer is KG Knutsson/KGK Norge and the Delivery Order is created. Let us know if you'd like that built.

## 10. Invoicing

Invoicing only happens once the Delivery Order has been validated with the correct serial number recorded (Section 8.3). The department lead then finalizes invoicing for their own order directly in the Sales app: open the Sale Order (Section 8.1), click Create Invoice, and confirm it for the agreed price. The Invoices shortcut on the order itself is not reliable yet (Section 8.1).

- Recommended check: periodically filter the Orders list (Fig. 2) by Stage = In Progress with a Sales Order but no Invoice yet, to catch anything that shipped but was never invoiced.

## 11. Department Leads: Quick Reference

| Department       | Lead               | Tag shown on order |
|------------------|--------------------|--------------------|
| HV Battery       | Yamen Kajah        | HV Battery         |
| Drive Units (DU) | Jedrzez Frackowiak | DU                 |
| HV Parts         | Igor Majeron       | HV Parts           |
| Steering Rack    | Koray Oztuzun      | Steering Rack      |
| AC Compressor    | Koray Oztuzun      | AC Compressor      |
| Software         | Kevan Qureshi      | Software           |

## 12. Backup Coverage for Absences

Policy: every department lead must designate a backup person who can take over their orders whenever the lead is absent for more than 24 hours, and must personally train that backup on this procedure (this document, plus the "Assigned to"/Planning/Manufacturing/Sale/Delivery/Invoice steps in Odoo) before it is needed.

- While the lead is out, the backup takes ownership of that department's orders in the Orders app (Assigned to) so the 12:00 reply-time rule (Section 4.2) keeps being met.
- The backup needs the same Odoo access as the lead (Orders app, Planning, Manufacturing, Sales, Inventory) to actually process an order end to end, not just view it.
- Recommended: once each lead has named their backup, add the name to the table below and keep it current. This is the fastest way for Zoran or Emelie to know who to reassign an order to on short notice.

| Department       | Lead               | Backup           |
|------------------|--------------------|------------------|
| HV Battery       | Yamen Kajah        | to be designated |
| Drive Units (DU) | Jedrzez Frackowiak | to be designated |
| HV Parts         | Igor Majeron       | to be designated |
| Steering Rack    | Koray Oztuzun      | to be designated |
| AC Compressor    | Koray Oztuzun      | to be designated |
| Software         | Kevan Qureshi      | to be designated |

## 13. Points Worth Your Attention

Verified directly against the live database while preparing this document. Nothing here has been changed, these are just flags for you to decide on:

1. orders@evhub.no vs orders@evhub.odoo.com: confirm which address customers actually use, and that it reaches the Orders app (Section 2).
2. The 12:00 same-day-reply rule is not tracked by Odoo today (Section 4.2). No SLA policy exists, so there's no dashboard alert or red flag for a missed deadline. Happy to configure a real SLA Policy if you want this enforced/visible.
3. Auto-tagging and auto-follower only happen for form-submitted orders with order lines, not plain e-mail orders (Section 4.1). Plain e-mail orders still need Tags + Assigned to set by hand, exactly as your process says.
4. The customer is only told the planned delivery date if the Planning entry is both marked "Notify Customer" and Published (Section 6). Creating it alone is silent to the customer.
5. There's no "part is ready" automatic e-mail (Section 8.2) and no automatic Autoexperten notification (Section 9). Both are manual today. Both are easy to automate later if useful.