

Smart



Tootega

Tootega manufactures sit-on-top kayaks which it exports all over the world. All its kayaks are designed, developed and manufactured at a custom-built manufacturing facility in the Norfolk countryside, whilst a dense dealer network supports the company across the UK, Europe and the globe.

The challenge

After researching the market for a suitable ERP and CRM system, Tootega was attracted to Odoo's open source software and massive range of applications, and began using it independently. However, after a year it became apparent that Tootega's internal processes were too complex for Odoo's out-of-the-box system to accommodate.

Specifically, the boating industry requires every boat to incorporate a Hull Identification Number (HIN). Tootega was generating this manually – an overly complex and convoluted process for a growing company – but was unable to customise Odoo internally to support this procedure. The boat industry also demands a specific



quality process, with a quality checking label placed on the vessel after manufacture is complete; producing this label would require a customisation of Odoo's module.

The solution

Since Smart IT was a Gold partner and had the most UK installations under its belt, Tootega met with a team of the firm's consultants to discuss its pain points and objectives for a new ERP system.

We began with consultants on site for several days to understand the end-to-end manufacturing process and customer journey, and to conduct a gap analysis of the standard Odoo system. From there, we produced a project initiation document, identifying all the customisations which needed to be made to meet Tootega's requirements and agreeing a series of project tasks and milestones.

Key stages included a code review, a development review, internal testing, user acceptance testing and the final go live stage.

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Steve Childs, Director at Tootega



Tootega was using most of Odoo's modules except for the website and full accounting modules – though the company will migrate both of these across to Odoo in due course so the foundations had to be laid for a smooth transition.

Most of the customisations had to be made in the manufacturing and inventory modules, to enable the automatic production of a HIN. We designed a process within the manufacturing module so that all elements of the manufacturing process fed into a the HIN, which is always made up of specific characters in relation to the manufacturer and boat. We included a customisation to reject the use of the last four numbers if they had been used previously, to ensure that every HIN is unique.

At the quality check stage, we designed a Wizard which produces a pop-up screen confirming the boat's product, colour and quality level. When confirmed, the system automatically generates a production ticket which forms the quality label for the boat.

Further customisations were carried out on the contact and sales modules, to monitor which contacts have discounts on particular boats and to automatically pull through the settlement discount over a certain amount. All customisations were carried out to precisely match Tootega's processes today, and ambitions for the future.

The results

Tootega is now using Odoo in a fashion absolutely tailored to its precise context and needs. All of the core ERP functions the firm needs to support its end-to-end manufacturing process are supported, including the HIN processes and quality checking unique to the boat industry.

Smart IT is continuing to work with Tootega on a range of further projects. These include preparing for the migration of the existing accounting system to

Odoo, and the migration of the website to Odoo for full ecommerce functionality and integration with the rest of the system. We are also defining an extra workflow so that Tootega can manage second quality level stock and sell it off at a reduced rate.

Barry Bullen, Head of Customer Development at Smart IT said: "Tootega is a wonderful small business in a really interesting area; both the boating industry and manufacturing the manufacturing process require a thoughtful approach to customising Odoo's core functions. We're thrilled to have helped Tootega tailor Odoo to their needs and looking forward to working with the business again in the future.

Steve Childs, Director at Tootega added: "Smart IT has been invaluable in helping Odoo work for us. The team's analytical approach helped us really understand exactly where we needed Odoo to be altered and amended, and the automation they have introduced has really speeded up our internal processes and improved our customer service experience."