

# DoImplement

Australian Odoo Implementers



# Recurring Service Jobs

Quote → Project → Timesheet → Invoice — the  
recurring lawn-mow workflow

# The Big Picture

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One quote can drive an ongoing service that repeats forever — and bills correctly every time.

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[Sales]      Quote → confirm SO
[Project]    Task auto-created → schedule + recurrence
[Timesheets] Hours logged against the task
[Invoicing]  Invoice from SO (uninvoiced hours pull through)
↻ Task recurs → next instance appears on the schedule
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# Why This Matters

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- **One quote, ongoing revenue.** Sell a recurring monthly mow once — Odoo handles the rest.
- **Tasks appear automatically.** Confirming the sales order creates the project task. No manual scheduling double-up.
- **Time → money, automatically.** Hours logged on a task flow through to the customer's next invoice.
- **Nothing falls through the cracks.** Recurrence creates next month's task and puts it on the assignee's schedule.
- **Multiple invoices per sales order.** Bill monthly off a single annual agreement.

# Setup (one-time)

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Configure the project and the labour product before  
selling

# Step 1 Enable Recurring Tasks

Open the project → Settings → tick **Recurring Tasks**. Without this, the recurrence option is hidden on individual tasks.

The screenshot shows a project settings interface for a project named 'MOWING'. At the top, there is a 'New' dropdown and a 'Projects' header. On the right, there are two summary boxes: 'Tasks 14 / 20 (70%)' with a checkmark icon, and 'Dashboard 0 Status' with a radio button icon. Below this is a 'Share Project' button. The main content area is divided into two sections: 'TASKS MANAGEMENT' and 'SALES & INVOICING'. Under 'TASKS MANAGEMENT', there are two settings: 'Recurring Tasks' (checked) and 'Task Dependencies' (unchecked). Under 'SALES & INVOICING', there is one setting: 'Billable' (checked). A 'Sales Order Item' section with a lightbulb icon provides instructions on how to give portal users access to the project.

New ▾ Projects  
MOWING ⚙

Tasks 14 / 20 (70%) Dashboard 0 Status

Share Project

Sales Order Item ?

💡 To give portal users access to your project, add them as followers. For task access, add them as followers for each task.

**TASKS MANAGEMENT**

- Recurring Tasks ?  
Auto-generate tasks for regular activities
- Task Dependencies ?  
Determine the order in which to perform tasks

**SALES & INVOICING**

- Billable ?  
Invoice your time and material to customers  
Timesheets without a sales order item are reported as not billable

# Step 2 Configure the Labour Product

The labour product is the bridge between Sales and Projects. Get this right and everything else flows.

Product ?

☆ Irrigation Tech (Variable)

Sales ?  Subscriptions ?  Point of Sale ?  Purchase ?

General Information Sales Prices Purchase Accounting

Product Type ?  Goods  Service  Combo

Create on Order ? Task

Project ? MOWING

Task Template ?

Invoicing Policy ? Based on Timesheets


Sales Price ? \$ 145.00 per Hours

Sales Taxes ? 10% GST x (= \$ 159.50 Incl. Taxes)

Cost ? \$ 0.00 per Hours

Purchase Taxes ? 10% GST x

Category ?



# Why Each Setting Matters

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Setting	Value	What it does
Product Type	Service	Marks it as labour, not stock
Invoicing Policy	Based on Timesheets	Bills the hours actually worked, not the quoted quantity
Service Tracking	Task in existing project	Auto-creates a task on SO confirmation
Project	Recurring Services	Tells Odoo which project to create the task in

**Tip:** "Based on Timesheets" is the variable bit — quote 1 hour, work 1.5 hours, invoice 1.5.

# Sell & Schedule

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Quote the customer, confirm, and watch the task appear

# Step 3 Create the Quote

Sales app → New quotation → add the labour category product → send to customer.

Create Invoice Send Preview Cancel

Quotation Quotation Sent Sales Order

## S00032

Customer <sup>?</sup> MR X  
GC 3455

Order Date <sup>?</sup> 17 Apr, 9:54 am

Invoice Address <sup>?</sup> MR X

Pricelist <sup>?</sup> Default (AUD)

Delivery Address <sup>?</sup> MR X

Payment Terms <sup>?</sup> Immediate

Quotation Template <sup>?</sup>

Order Lines Other Info Customer Signature Notes

Product	Quantity	Delivered	Invoiced	Unit	Unit Price	GST	Disc.
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# Step 4 Confirm the Sales Order

The moment you confirm, Odoo creates a task on the linked project. You'll see a "Tasks" smart button on the SO.

The screenshot displays the Odoo Project interface. At the top, there is a navigation bar with tabs for 'Project', 'Projects', 'Tasks', 'Reporting', and 'Configuration'. Below this, a 'New' button is visible next to the project name 'Projects' and 'MOWING'. A search bar on the right contains a magnifying glass icon, a dropdown arrow, the text 'Open', and a search input field. The main content area shows a Kanban board with two columns: 'New' and 'In Progress'. The 'New' column contains a task card for 'S00032 - Irrigation Tech (Variable)'. The card includes the text 'MR X' and the time '29 May, 10:00 am → 11:00 am'. At the bottom of the card, there is a clock icon, a red-bordered box containing '-00:30', three star icons, and a teal button with the letter 'B'.

# Step 5 Schedule & Set Recurrence

Open the task, assign someone, set the date, and turn on recurrence.

The screenshot shows a task management interface. At the top, there's a breadcrumb trail: "New" (dropdown), "Projects / MOWING", and "S00032 - Irrigation Tech (Variable)" (with a gear icon). To the right, there are summary boxes: "\$ Sales Order", "Invoices 2", and "Recurring Tasks 4". Below this is a progress bar with "Start", "New 1h" (highlighted), "In Progress", and "Done" buttons, plus a "Send me" button. The main task title is "S00032 - Irrigation Tech (Variable)" with three stars and an "In Progress" status. The task details are as follows:

Project ?	MOWING	Tags ?	
Assignees ?	B Bob Tech	Customer ?	MR X
		Sales Order Item ?	S00032 - Irrigation Tech (Variable) (M...
		Planned Date ?	29 May, 10:00 am → 11:00 am
		Repeat Every ?	2 Weeks Forever
		Allocated Time ?	01:00 (150%)

A red circle highlights a circular refresh icon (a square with a 'C' inside) located to the right of the "Planned Date" field.

At the bottom, there are tabs for "Description", "Timesheets", "Sub-tasks", and "Extra Info". On the right side, there's a "Miro Task" button with an 'A' icon.

# Deliver & Bill

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Log the hours, send the invoice, repeat next cycle

# Step 6 Log Timesheet Hours

The crew opens the task and adds time on the Timesheets tab — or logs from the Timesheets app against the same task.

## S00032 - Irrigation Tech (Variable) ☆ ☆ ☆ In Progress

**Project ?** MOWING

**Assignees ?** B Bob Tech

**Tags ?**

**Customer ?** MR X

**Sales Order Item ?** S00032 - Irrigation Tech (Variable) (M...

**Planned Date ?** 29 May, 10:00 am → 11:00 am ↻

**Repeat Every ?** 2 Weeks Forever

**Allocated Time ?** 01:00 (150%)

Description **Timesheets** Sub-tasks Extra Info

# Step 7 Invoice from the Sales Order

Back on the sales order → Create Invoice → Regular invoice. Odoo bills only the uninvoiced timesheet hours.

The screenshot displays the Odoo interface for a sales order (S00032) in the 'Sales Order' state. The top navigation bar shows 'Orders to Invoice S00032' and summary statistics: 1 Project, 4 Tasks, 8 Recorded Hours, and 2 Invoices. The main interface includes buttons for 'Create Invoice', 'Send', 'Preview', and 'Cancel', along with a progress bar showing 'Quotation', 'Quotation Sent', and 'Sales Order'. A modal dialog titled 'Create invoice(s)' is open, offering three options for creating an invoice: 'Regular invoice' (selected), 'Down payment (percentage)', and 'Down payment (fixed amount)'. The 'Timesheets Period' field is also visible at the bottom of the dialog.

Orders to Invoice  
S00032

1 Projects  
4 Tasks

Recorded  
8 Hours

Invoices  
2

Create Invoice Send Preview Cancel

Quotation Quotation Sent Sales Order

**S00032**

Customer ? MR X  
GC 3455

Invoice Address ? MR X

Delivery Address ? MR X

Quotation Template ?

Order Lines Other Info

**Create invoice(s)**

Create Invoice ?  Regular invoice  
 Down payment (percentage)  
 Down payment (fixed amount)

Timesheets Period ? →

# Step 8 The Loop Continues

When the current task is marked done, Odoo creates the next instance dated per the recurrence rule. The assignee sees it on their schedule.

The screenshot shows the Odoo Kanban board for a project named "Projects MOWING". The board is divided into three columns: "New", "In Progress", and "Done".

- New Column:** Contains 1 task. The task is "S00032 - Irrigation Tech (Variable)" with a recurrence rule of "MR X" and a due date of "29 May, 10:00 am → 11:00 am". It has a timer set to "-00:30" and a blue "B" button.
- In Progress Column:** Currently empty.
- Done Column:** Contains 3 completed instances of the same task:
  - Instance 1: "S00032 - Irrigation Tech (Variable)", "MR X", "17 Apr, 10:00 am → 11:00 am", timer "-02:00", and a green checkmark.
  - Instance 2: "S00032 - Irrigation Tech (Variable)", "MR X", "1 May, 10:00 am → 11:00 am", timer "-01:00", and a green checkmark.
  - Instance 3: "S00032 - Irrigation Tech (Variable)", "MR X", "15 May, 10:00 am → 11:00 am", timer "-00:30", and a green checkmark.

# Recap — The Whole Loop

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1. Project → enable Recurring Tasks
2. Product → Service + timesheet billing + auto-task
3. Quote → add labour product → send
4. Confirm SO → task auto-created
5. Open task → assign • schedule • set recurrence
6. Crew logs timesheet hours against the task
7. Create invoice from SO → only uninvoiced hours billed
8. Mark task done → next recurrence on the schedule ↻

**One quote. Ongoing service. Hours billed accurately.**

# Questions?

Country Landscaping & Irrigation — Recurring Service Jobs