# Managing your sales funnel in Odoo

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Introduction:

### Sales funnel





### Sales funnel managed in Odoo





## Advantages of Odoo's sales app

- 1 Intuitive apps
- Fully integrated with ecommerce, messaging ...
- 3 Easy to configure
- 4 Invoicing in one click
- A lot of plugin modules to extend basic features (survey, contracts, portal ...)



Use Case

#### Use case

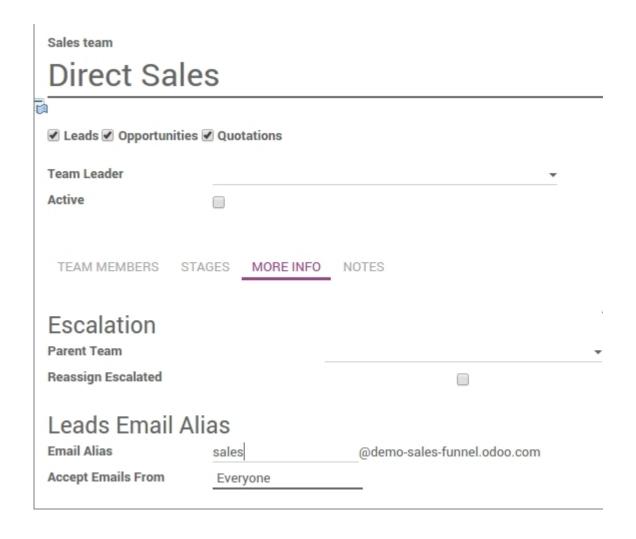
My company is selling wines and want to send quotations to my customers avoiding a waste of time switching between my old sheets.

I decided to use Odoo from promotion and negotiation till the invoice phase.



Sales process

### Define an email alias to create leads





## Leads generated from the website

#### Contact us

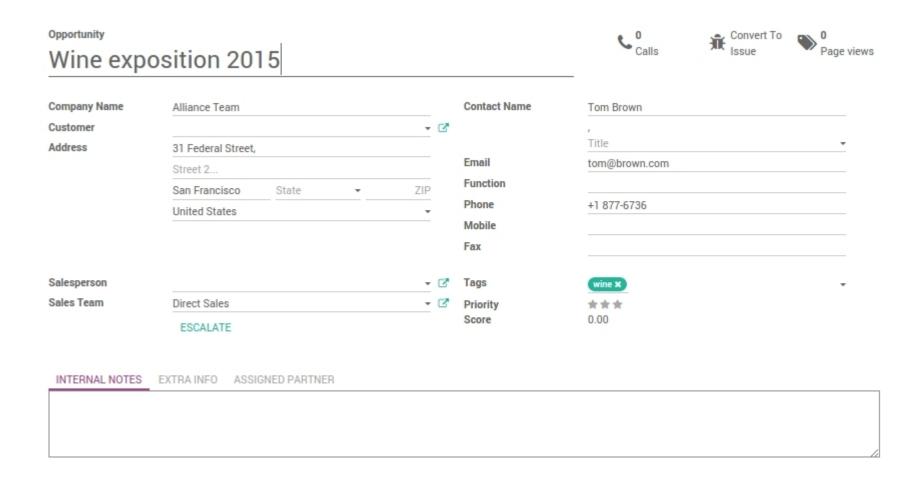
Contact us about anything related to our company or services.

We'll do our best to get back to you as soon as possible.

Your Name	
Phone Number	e.g. (+32).81.81.37.00
Email	
Your Company	
Subject	
Your Question	
	Send



### Leads in odoo





## Manual quotation

Customer Axelor Date

12 rue Albert Einstein Expiration Date 06/24/2015

77420 Champs sur Marne Payment Term

France Quotation Template Default Template

05/25/2015 13:37:23

ORDER LINES SUGGESTED PRODUCTS OTHER INFORMATION

	Product	Section	Description	Quantity	Unit Price	Cost Price	Taxes	Subtotal
•	Brouilly wine		Brouilly wine	1.000	20.00	0.00	Tax 15.00%	20.00
•	Chardonnay 2013		Chardonnay 2013	1.000	25.00	0.00	Tax 15.00%	25.00

Untaxed Amount \$45.00 Taxes \$6.75

**Total** \$51.75



# Suggest products to your client

 Add suggested products in your quotation if you use the online quote

ORDER LINES SUGGESTED PRODUCTS OTHER INFORMATION

Optional Products & Services

Product	Description	Quantity	Unit Price
Alamos Chardonnay 2013	Alamos	1.000	9.50
Chardonnay 2014	Chardonnay 2014	1.000	10.00



#### Use the online quote to promote your products

Customer: Axelor

Bill To:

Axelor

912 rue Albert Einstein

77420 Champs sur Marne

France

**\+**33 1 64 61 04 01

■axelor@yourcompany.example.com

Your Contact: Administrator

 $\sim$ 

admin@yourcompany.example.com

Quote Date: 05/25/2015 13:37:23

Expiration Date: 06/24/2015

Use our website: get 10% Off

PROMOTION OF THE MONTH

Alamos chardonnay 2013: 9.5 USD

\* This offer is available till the end of the month





## Use the online quote for the quick sign

#### Pricing

Products	Quantity	Taxes	Unit Price	Price
Brouilly wine	1.000Unit(s)	Tax 15.00%	\$ 20.00	\$ 20.00
Chardonnay 2013	1.000Unit(s)	Tax 15.00%	\$ 25.00	\$ 25.00
			Subtotal:	\$ 45.00
			Taxes:	\$ 6.75
			Total:	\$ 51.75

### Suggested Products

Products	Description	Price
Alamos Chardonnay 2013	Alamos	\$ 9.50
Chardonnay 2014	Chardonnay 2014	\$10.00





# Demonstration

## CUSTOMER REFERENCES

**USED BY 2.000.000 USERS WORLDWIDE** 

Questions?



# Thank You

#### Odoo

sales@odoo.com +32 (0) 2 290 34 90 www.odoo.com

#### **R&D** and services office

Chaussée de Namur 40 B-1367 Grand Rosière

#### Sales office

Avenue Van Nieuwenhuyse 5 B-1160 Brussels