



How to use Odoo in the HR industry?

Céline Da Mota, Business Analyst

 Quickstart Team

1

Introduction

2

Company's needs

3

Demonstration

4

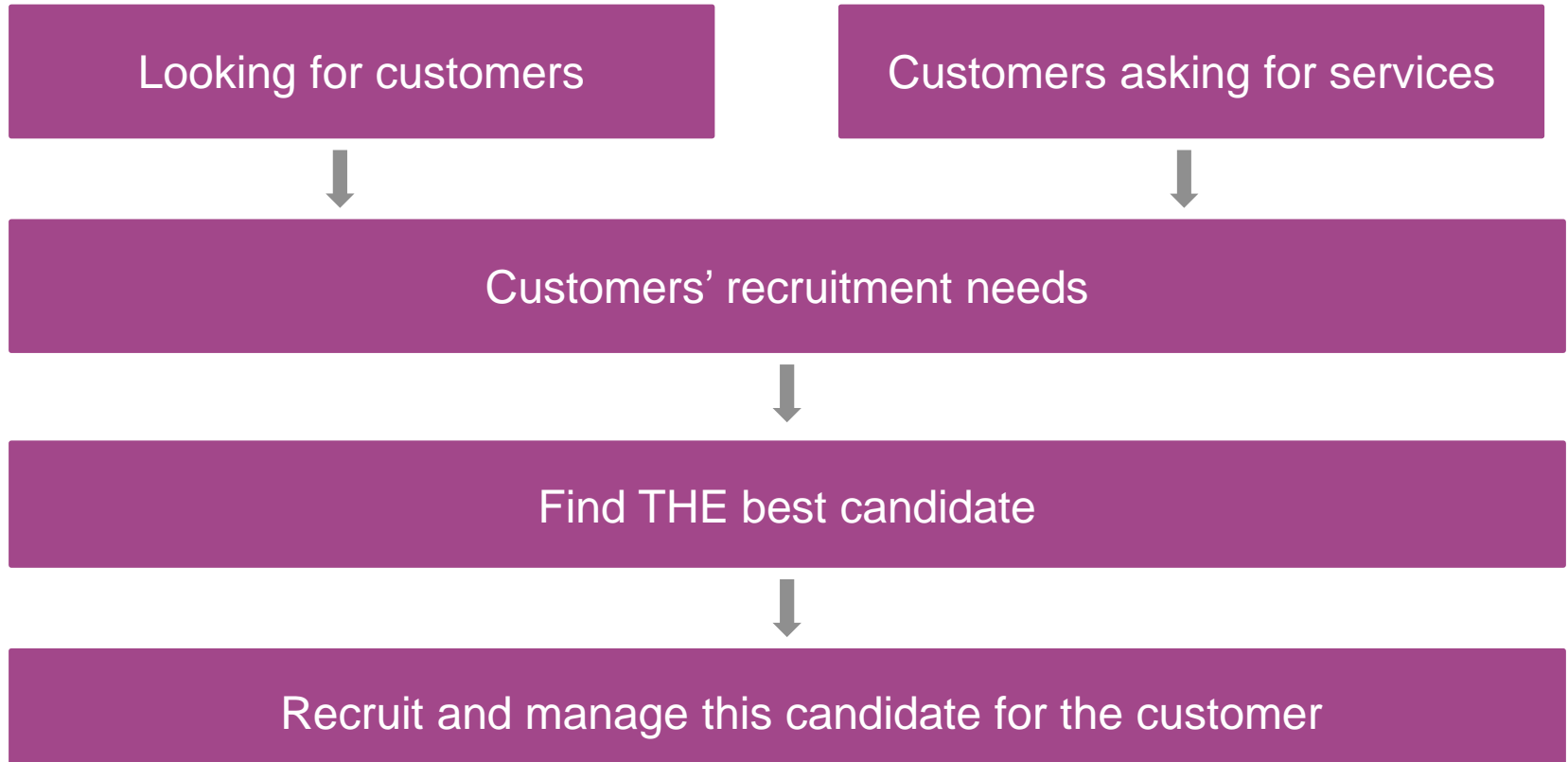
Conclusion



Introduction

A real case at Odoo

- **Recruitment company**





How to use Odoo in the HR industry?

- **They were facing big issues**
 - Two persons
 - Work from two different offices
 - Work with Excel and no share document
 - CVs and other reports : computers, papers and email

- **Work with excel : Dashboard**

- Duplicate job position line per applicant
- Missing fields
- More than 30 columns

TIME		FIRM		Client		RFP						CANDIDAT		
Year	WE number Outlo	Country	Firm	Name CLIENT	Exact need name	Deadline Date	RFP Status	Need type	Prio	GO for this RFP*	Source	First NAME	Last NAME	Comment
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No Go	YRD	Nicolas	CAMBOT	Pas intéressé pour le moment
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Hélène	LEMONTVERT	Invit envoyée
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Alexandre	JOLY	cepté l'invit et lui ai renvoyé le
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No Go	YRD	Alexis	BLANDIN	Veut rester dans sa région
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No Go	YRD	Ludovic	PERACHE	Veut travailler en Suisse
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Nicolas	CLAPIE	Invit envoyée
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Pierre Erol	GIRAUDY	Invit envoyée
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Thomas	OBRV	Invit envoyée
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No Go	YRD	Maxence	DERIEPPE	Veut rester à Lille
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Charles	NSEKE	cepté l'invit et lui ai renvoyé le
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Pierre	TORKA	cepté l'invit et lui ai renvoyé le
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Olivier	RONDREUX	Invit envoyée
2015	9	Lux		ARCELOR	ARCHI SHAREPOINT	ASAP	Opened	RFP	1	No News	YRD	Michel	DE CREVOISIER	Invit envoyée
2015	10	Lux		ARCELOR	PM CAPEX	ASAP	Opened	RFP	1	No News	YRD	Thibaut	WEBER	Mail Envoyé
												Andrew	MASSY	Mail Envoyé
										No Go		Hans	KELLER	Pas intéressé
										No Go		Sarah	LE DU	Veut rester chez Danone
												Jean-Christophe	GARNIER	
												Alexandre	DE NEEF	
										No Go		Werner	SPINNOY	Veut du part time
												Jean-François	COLLETTE	
										No Go		Angel	DOSUNA	gne et cela est compliqué pou

odoo

Company's needs



- **They need a CRM app**
 - Organize their opportunities
 - Manage their sales funnel
 - Email integration and automation
 - Monitor their sales performance



- **They need a Human resources app**
 - Manage the recruitment process
 - Search with resume content
 - Reports and dashboards
 - Use the same information in different views via filters



CRM



Sales management



Human Resources



+ 3 Data Imports

- Customers
- Job positions/applicants
- CV

Annual : 1000€
+ 1500€

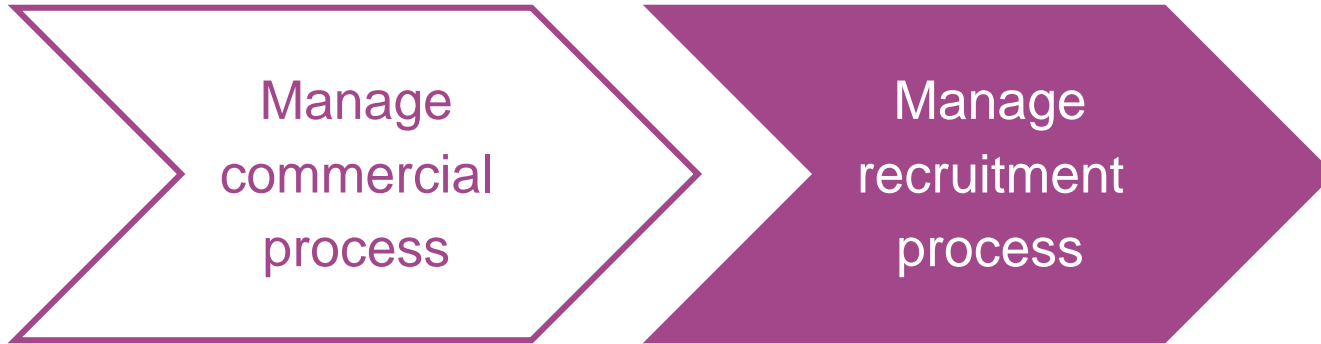


Let's Quickstart them!

Demo time

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Conclusion



- ✓ Manage leads
- ✓ Create opportunities
- ✓ Log calls and meetings
- ✓ Create job positions
- ✓ Receive job applications
- ✓ Search with Index content

What's next?





Thank You

Any question?

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

- Start from an empty database
 - Install CRM and Human resources
 - Search with resume content

- CRM
 - Configure stages
 - Import CSV with fake contact details
 - Go through the stages with a few of those leads

- Human resources
 - Create a job position
 - Configure stages
 - Import CSV file with fake applicants details and resumes
 - Go through the stages with a few of those applicants
 - Recruit the best applicant

•Sales/Opportunities

Sales

- Customers
- Leads
- Opportunities
- Quotations
- Sales Orders

Phone Calls

- Logged Calls

Products

- Products
- Product Variants
- Products by Category

Tools

- Deduplicate Contacts

Configuration

- Contacts Segmentation
- Unit of Measure Catego...

New 3 + Expected Revenues: 0.00	First Meeting 0 +	Second Meeting (if ne... 1 + Expected Revenues: 0.00	Won 3 + Expected Revenues: 0.00
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Search for office assistant Best Designers 07/01/2015 : Call James Dufey's</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Need 3 months of Consultancy - 10 000€ Mediapole</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Consultancy services in IT Bank Wealth and sons</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div>		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Looking for marketing officer Global Solutions</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>URGENT: Need BA Life Insurance for next month Bank Wealth and sons</p> <p style="text-align: right;">★ ★ ★ ★ </p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Axelor: We need a marketing manager Axelor</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Looking for a Dev T 24 Luminous Technologies</p> <p style="text-align: right;">★ ★ ☆ ☆ </p> </div>

2

- Humain resources / job positions

Debug View# **Job Positions** In Recruitment x

Create

Fr_Bank W&S_ BA Life Insurance
Recruitment Consulting / Recruitment ...
job132@recruitment-consulting.odoo **Hired Employees**

7 Applications
1 Document

Recruitment Done

Bel_Luminous Tech_ Dev T24
Recruitment Consulting / Recruitment ...
job133@recruitment-consulting.odoo **Hired Employees**

4 Applications
1 Document

Recruitment Done

Fr_Axelor_Marketing manager
Recruitment Consulting / Recruitment ...
job135@recruitment-consulting.odoo **Hired Employees**

6 Applications
1 Document

Recruitment Done

Applicants	Waiting reports	Potential applicants	Meeting	Meeting with customer	Signed contract	Refused
<p>5 + 0</p> <p>Julien Hour Julien HOUR! Fr_Bank W&S_ BA Life Insurance FR Life Insurance 0 Documents</p> <p>Rosanna Casonato Rosanna Casonato Fr_Bank W&S_ BA Life Insurance FR EN SP project manager 0 Documents</p> <p>Denis Bredo Denis Bredo</p>	No go	<p>1 + 0</p> <p>Kamel Moulai Kamel Moulai Fr_Bank W&S_ BA Life Insurance 1 Documents</p>	No go on CV	No go on CV	1	0

- Humain resources /applicants

- Create your filters

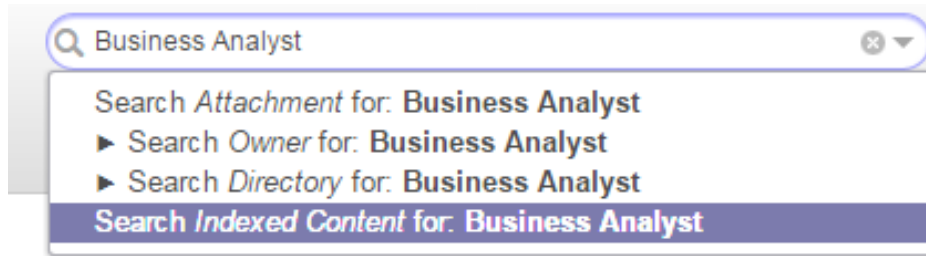
★ Favorites Applicants Applicants/Stages/Opened job position
🔍 Filters My Unassigned Next Actions New Mail
☰ Group By Responsible Job Degree Stage Creation Date Last Stage Update

- Save current filter
- Advanced Search
- Add to Dashboard

- Set it by default and see the next action to do when Opening Odoo

Group
▼ Fr_Bank W&S_ BA Life Insurance (6)
▸ Applicants (5)
No go (0)
Waiting reports (0)
▸ Potential applicants (1)
Meeting (0)
No go on CV (0)
Meeting with customer (0)
Signed contract (0)
Refused (0)

- Humain resources / resumes and letters
 - Search on any keywords contained in all documents



Create



CV Branchu
François.doc



CV Stéphane
Joyeux.doc



Julien Grolet
- resume
(english) -
April
2015.docx



Marc_ANGSTH



Kamel_Moulai



Laurent_BREV