

An introduction to Odoo CRM

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Introduction



Characteristics of Odoo CRM



Demonstration



Conclusion



Introduction

What is CRM?





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Characteristics of Odoo CRM

Omnichannel sales

The screenshot displays a CRM interface for a sales pipeline. At the top, a purple navigation bar contains the 'Sales' logo and menu items: Dashboard, Sales, Invoicing, After-Sale, Leads Management, Reports, and Configuration. On the right of the bar are icons for a phone, 25 notifications, a search bar, and a user profile for 'Administrator'. Below the navigation bar, the main area is titled 'Your Pipeline' with a search bar and a 'CREATE' button. The pipeline is organized into five columns: New, Qualification, Proposition, Negotiation, and Won. Each column contains several task cards. Each card includes a title, value, date, communication type, and a user profile picture. A tooltip is visible over a card in the Negotiation column, showing 'Need to customize the solution' with a value of 4,500.00€ and a date of 02/11/2016.

Stage	Task Title	Value	Date	Type	Rating	Comments
New	Interest in your Graphic Design Project	24,000.00€ - Agrolait	02/14/2016	Email	3 stars	
New	Plan to buy 60 keyboards and mouses	40,000.00€	02/14/2016	Task	3 stars	
New	Need 20 Days of Consultancy	60,000.00€	02/13/2016	Email	3 stars	
Qualification	Pricing Information of Services	1,000.00€	02/10/2016	Email	3 stars	1 comment
Qualification	Trainee's training plan in your Organization	35,000.00€ - Delta PC	02/12/2016	Call	3 stars	2 comments
Qualification	Need script to Import external data	5,600.00€ - Camptocamp		Email	3 stars	
Proposition	"Resource Planning" project develpment	9,000.00€ - Delta PC		Task	3 stars	
Proposition	Interest in your customizable Pcs	15,000.00€ - Camptocamp	02/09/2016	Call	3 stars	
Proposition	Would appreciate more information about your products	11,000.00€ - Agrolait	02/11/2016	Email	3 stars	
Negotiation	Need a new design for my website	3,800.00€ - Delta PC	02/13/2016	Task	3 stars	
Negotiation	Need to customize the solution	4,500.00€	02/11/2016	Call	3 stars	
Negotiation	Plan to buy RedHat servers	25,000.00€ - Agrolait	02/12/2016	Call	3 stars	4 comments
Won	Interest in your Partnership Contract	19,800.00€ - China Export		Call	3 stars	
Won	Interest in your products	2,000.00€ - Agrolait	02/11/2016	Email	3 stars	
Won	Want to subscribe to your online solution	2,000.00€ - Think Big Systems	02/12/2016	Email	3 stars	

Our mission is to transform the way companies run their business. We make it simple & fully integrated.

✓ Lead creation through different channels

Get more & more lead via website contact form, emails, campaigns, ...

✓ Great qualification tool

Employee assignment, geolocalisation, ...

✓ Excellent communication

Easy-to-use chatter for internal as well as customer communication

✓ Planification tool

Meetings, next actions to be taken

✓ Performance calculator

Pivot view, analysis of leads/actions, ...



Demonstration



Conclusion

Benefits of Odoo CRM.

- Fully integrated with other apps (website, sales, ...)
- Flexible to all businesses
- Accessible
- Easy to use
- Excellent communication tool

Thank you.



#odooexperience