



Savoir-faire
LINUX®



odoo
ICTC Training program

Versioning

Version	Date de version	Auteur / Contributeurs	Nature des modifications
2	2017-03-01	Carolandrea Guerrero Mickaël Brard Julien Jézéquel-Bréard	Diffusion initiale

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Sales Management

Outcomes

- Ability to create and lead a high-performance sales organization
- Developing and implementing an effective sales planning process
- Managing products and services sales orders
- Pricelist Management and discounts
- Developing and managing an effective performance appraisal system and incentive / commissions management for the salesforce

Sales & Marketing Strategies

Sales Strategies

1. Marketing Planning

- Business Strategy Review
- Competitive Analysis
- Customer Behavior
- Positioning

2. Sales Planning

- Salesforce Management
- Channel Strategy
- Sales Budget
- Product Marketing Strategy
- E-commerce Business Strategy

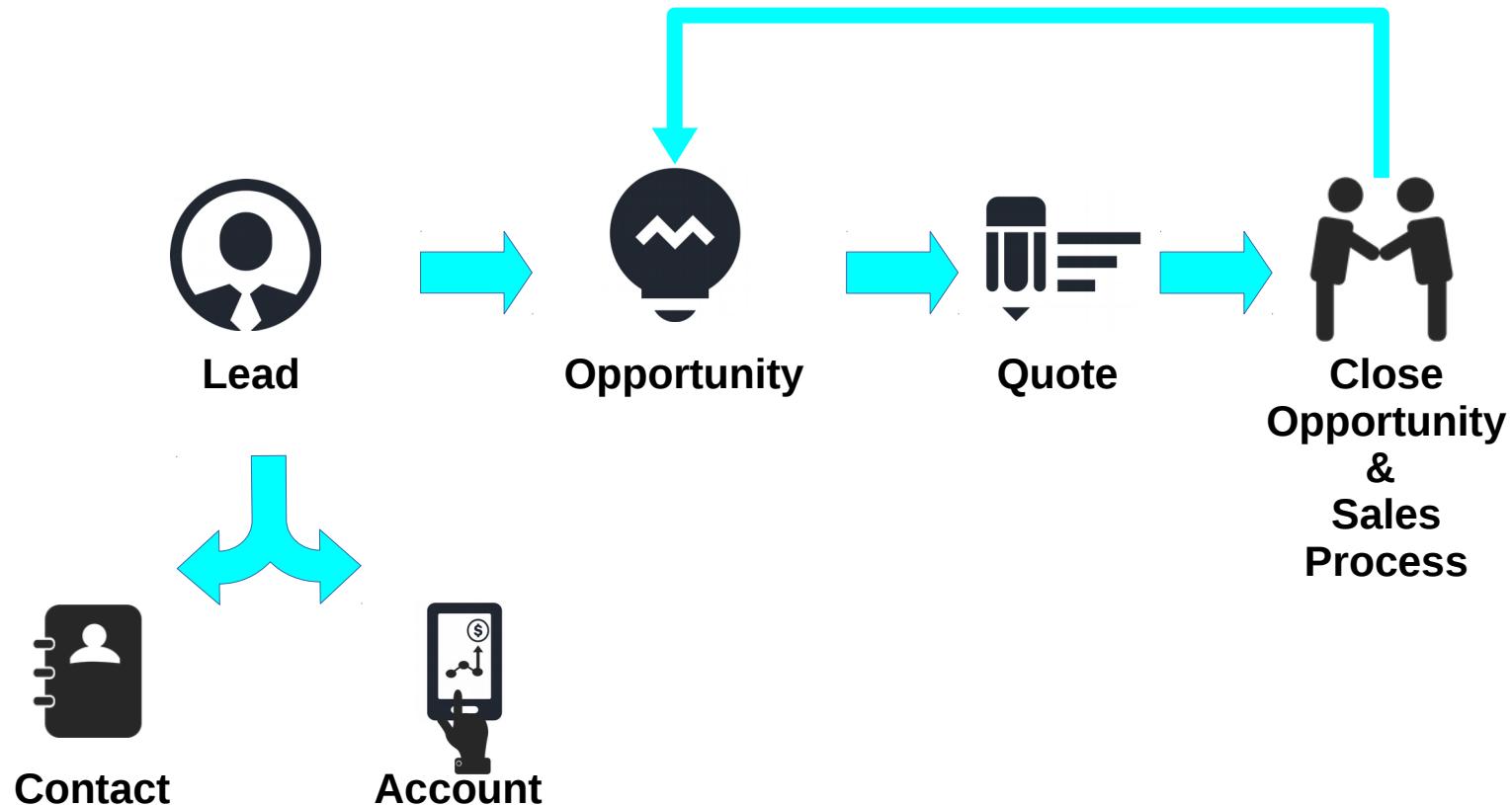
3. Sales Management

- Sales Process
- Discount Management
- E-Commerce Process

4. Sales Performance

- Sales Model Review (ROI)
- Net Promoter Score
- Customer Satisfaction

Sales Process Overview



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Customer Management

odoo Sales – Customer Management

› Customer basic information

- Company Name
- Address / Phone / Email
- Website

› Contacts & Addresses

- Billing address
- Delivery address

› Sales Conditions

- Delivery Method
- Sales Price list

› Accounting Conditions

- Customer payment terms
- Fiscal information
- Accounting accounts

The screenshot shows the Odoo Customer Management interface for the customer 'Agrolait'. At the top, there are several status indicators: Active (green), 4 Opportunities (yellow), 0 Meetings (grey), 12 Activities (blue), Published On Website (green), \$650.00 Invoiced (blue), \$0.00 Overdue (grey), and a More dropdown. Below this, the customer name 'Agrolait' is displayed with its logo. The main card contains basic contact information: Address (69 rue de Namur, Wavre 1300, Belgium), Phone (+32 10 588 558), Website (<http://www.agrolait.com>), Email (agrolait@yourcompany.example.com), and Language (English). It also lists Tags: Components Buyer, Partner / IT Services. Below the card, there are tabs for CONTACTS & ADDRESSES, INTERNAL NOTES, SALES & PURCHASES, ACCOUNTING, MEMBERSHIP, and PARTNER ASSIGNATION. Under CONTACTS & ADDRESSES, there are four contacts listed with their names, titles, and email addresses. There are also placeholder icons for more contacts.

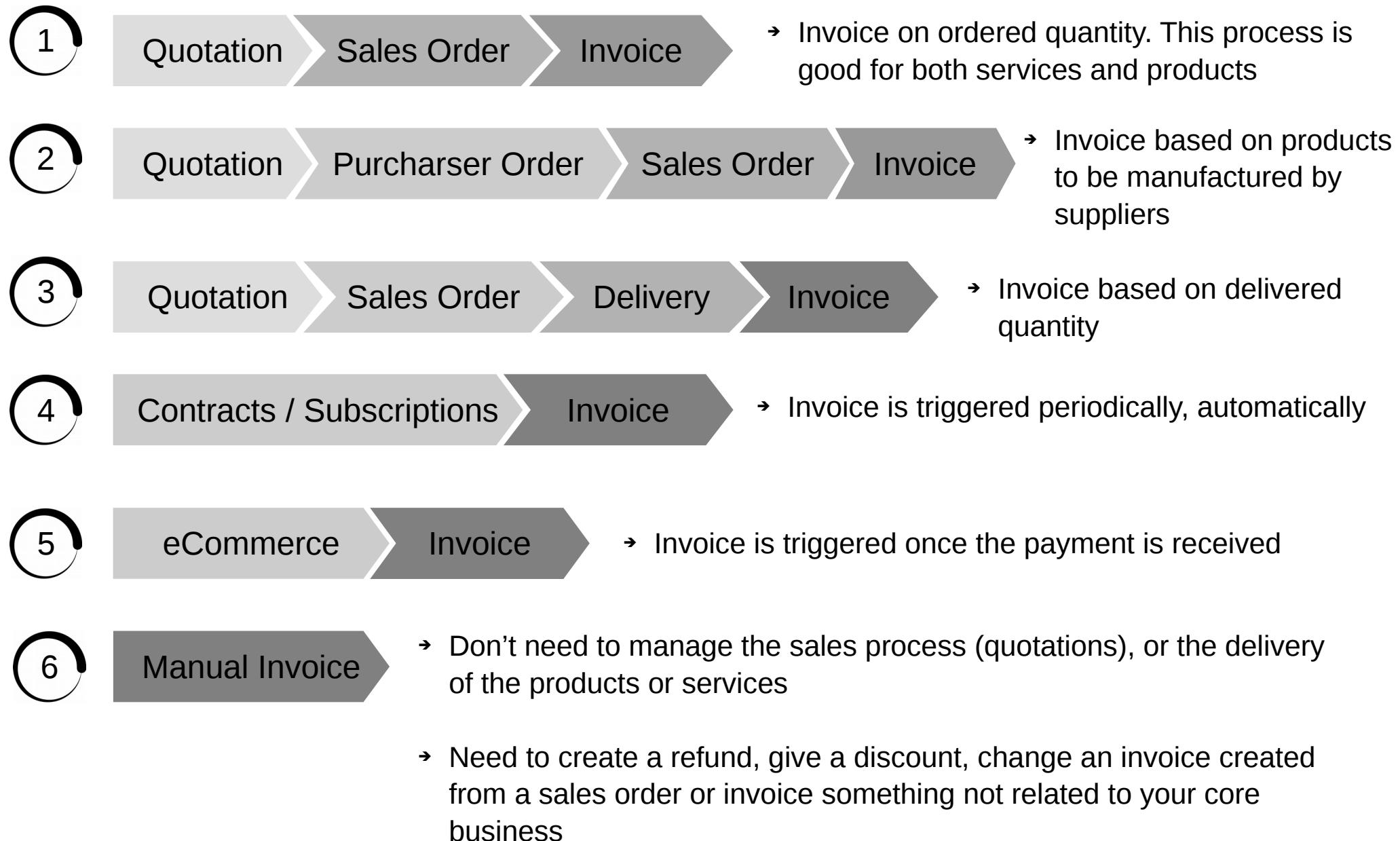
Exercise – Customer Management

TO DO

→ Complete the following information for the next customer :

- **Customer basic information**
 - Company Name : Canadian Art Inc
 - Address : 1234 Rue Sant-Urbain, Montréal – Québec, H5V 1D3
 - Email: info@canadianart.inc
- **Contacts & Addresses**
 - Billing address : 1234 Rue Sant-Urbain, Montréal – Québec, H5V 1D3
 - Delivery address #1: 100 Rue Beaubien O, Montréal – Québec
 - Delivery address #2: 2980 S Euclid Ave, Ontario – CA
- **Sales Conditions**
 - Sales Price list: Public Pricelist (CAD)
- **Accounting Conditions**
 - Customer payment terms: 30 Net Days
 - Fiscal information : Québec

odoo Invoicing Process



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Pricelist & Discounts

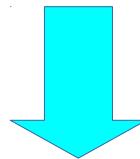
Workplan

- **Pricelist & discounts**

- A single sale price per product
- Prices per customer segment
- Advanced pricing & discounts



Pricing strategy to maximize revenue

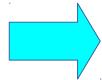


Pricing is the process of determining what a company will receive in exchange for its products.

Sales – Pricing Strategies

CUSTOMER VALUE-BASED PRICING

- Product properties & functionality
- Quality
- Emotional



Major Pricing Strategies



COMPETITION-BASED PRICING

- Survival
- Max. current profit
- Max. market share
- Max. market skimming
- Product – Quality
- Leadership



DEMAND-BASED PRICING

- Price sensitivity
- Estimating demand curves
- Price elasticity of demand



COST-BASED PRICING

- Activity – based Cost Accounting
- Type of Costs

Sales – Pricing Tactics

① Customer – segment pricing

Different customer segments pay different prices for the same product or service. (e.g. pricing strategies for students and senior citizens).

② Product-form pricing (versioning)

Different versions of the product are priced differently even though this difference does not apply with regard to their costs.

③ Image Pricing

The same product is priced at two different levels based on image differences. (e.g. the same product in different presentations or packaging)

Sales – Pricing Tactics

④ **Chanel Pricing**

A product is priced depending on the distribution channel (e.g. Coca-Cola - Fine restaurant, fast-food chain, or vending machine).

⑤ **Location Pricing**

Same product is priced differently at different locations even though the cost is the same. (e.g. An airline company varies its seat prices according to customer preferences for different locations).

⑥ **Time Pricing**

Price varies by season, day, or hour (weekend vs. Weekdays « early bird customers).

Sales – Pricing discounts and allowances

① Cash discount

Discounts given to cash, early or prompt payments.

② Quantity discount

Discounts given to those who buy large volumes.

③ Seasonal discount

Discounts given to products or services that are out of season.

④ Trade discount

Discounts given by manufacturers to resellers (long term).

⑤ Allowances

Discounts given to gain reseller participation in ***special programs***.

Workplan

- **Pricelist & discounts**
 - A single sale price per product
 - Prices per customer segment
 - Advanced pricing & discounts

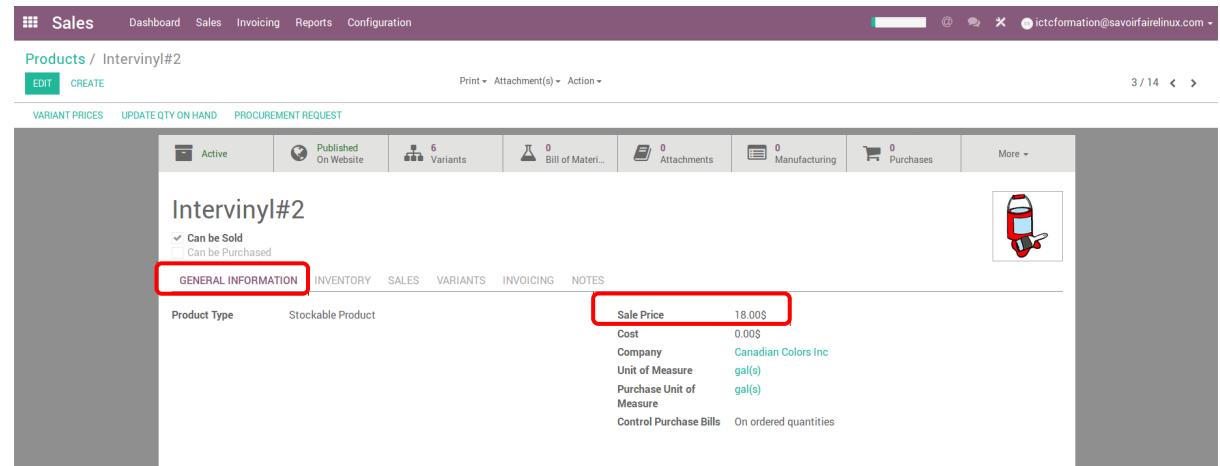
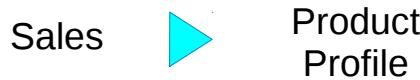
odoo Sales – One price per product

Steps to set up sale price per product:

1. Set up sale price



2. Register price per product



Exercise – A single sale price per product

TO DO

- Set up a new product manufactured by “Canadian Colors” :

Product : Home Hit

Product type : Stockable

Unit of measure : gal(s)

Sale Price : 18 \$CAN

Category product : Adhesives

Workplan

- **Pricelist & discounts**
 - A single sale price per product
 - Prices per customer segment
 - Advanced pricing & discounts

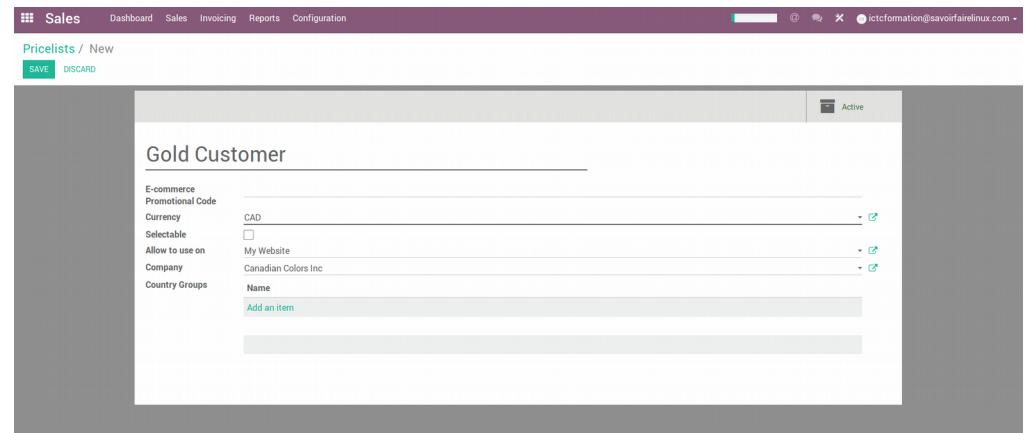
odoo Sales – Specific prices per customer segment

Steps to set up prices per customer segment:

1. Set up sale price



2. Create list of price per customer segment



odoo Sales – Specific prices per customer segment

3. Set up prices per customer segment

Sales ➔ Product Profile

The screenshot shows the Odoo Sales interface for a product named "Intervinyl#1". A red arrow points from the "Sales" section of the navigation bar to the "SALES" tab in the product profile. The "Pricing" section is highlighted with a red box, showing two price entries:

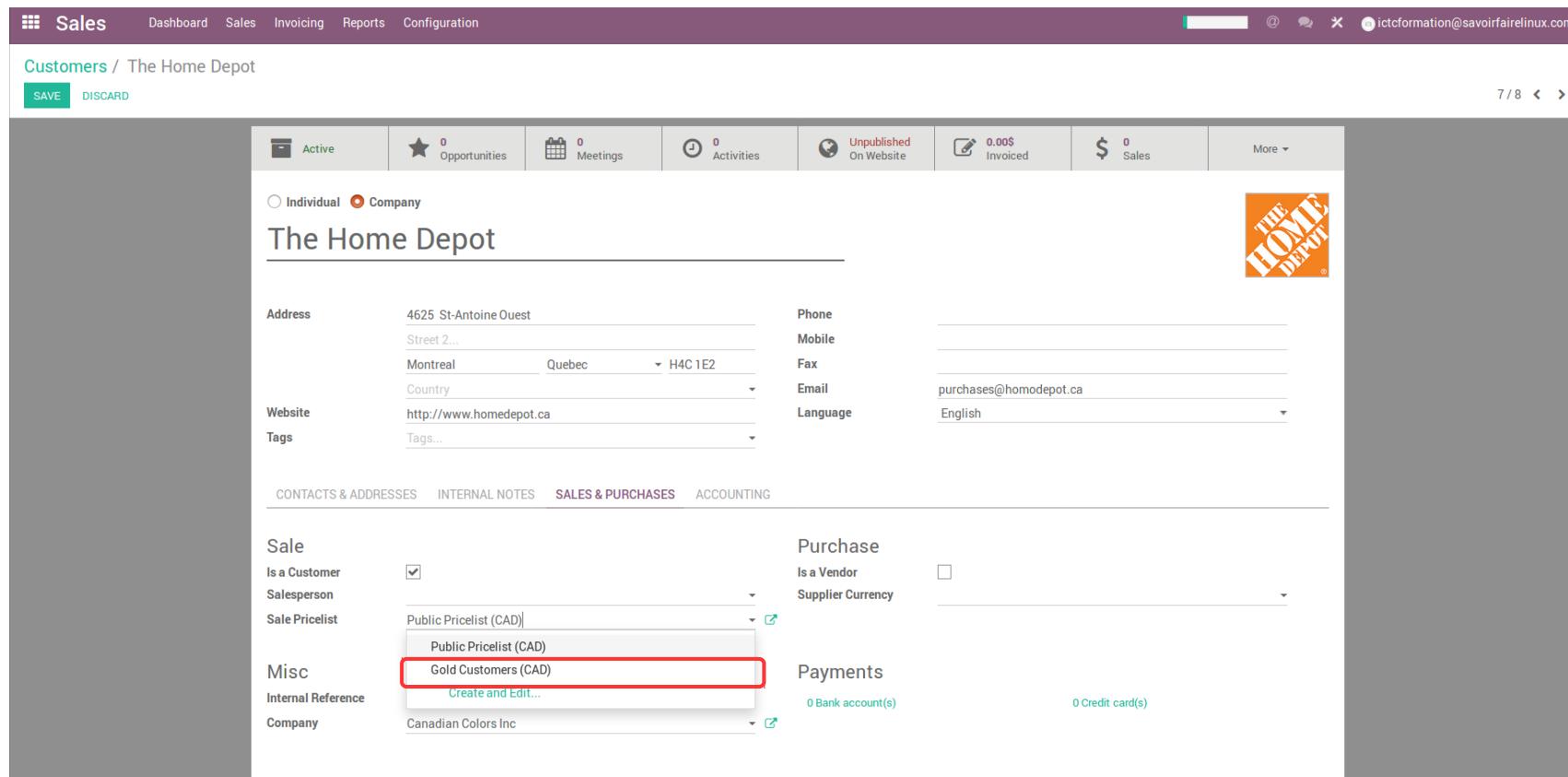
Pricelist	Price	Min. Quantity	Start Date	End Date
Public Pricelist (CAD)	11.00	1		
Gold Customer (CAD)	8.90	1		

Below the pricing table, there are sections for "Website", "Sale Conditions", and "Availability".

odoo Sales – Specific prices per customer segment

4. Set up prices list for a customer

Sales ➔ Customer Profile



The screenshot shows the Odoo Sales Customer Profile interface for 'The Home Depot'. The top navigation bar includes 'Sales', 'Dashboard', 'Sales', 'Invoicing', 'Reports', and 'Configuration'. The main content area displays customer details: Address (4625 St-Antoine Ouest, Montreal, Quebec H4C 1E2), Phone, Mobile, Fax, Email (purchases@homedept.ca), Language (English), and a logo for 'THE HOME DEPOT'. Below this, there are tabs for 'CONTACTS & ADDRESSES', 'INTERNAL NOTES', 'SALES & PURCHASES', and 'ACCOUNTING'. In the 'SALES & PURCHASES' section, under 'Sale', the 'Is a Customer' checkbox is checked, and the 'Sale Pricelist' dropdown menu is open, showing 'Public Pricelist (CAD)' and 'Gold Customers (CAD)', with 'Gold Customers (CAD)' highlighted by a red box. Under 'Purchase', the 'Is a Vendor' checkbox is unchecked, and the 'Supplier Currency' dropdown is empty. The 'Payments' section shows '0 Bank account(s)' and '0 Credit card(s)'. At the bottom left, there are fields for 'Internal Reference' (Canadian Colors Inc.) and 'Company'.

Exercise – Prices per customer segment

According to the buying behavior, “Canadian Colors” classified its customers under the following segments :

- General public & casual buyers
- Resellers
 - Premium Customers
 - Platinum Customers
 - Gold Customers

TO DO

- Create new price lists according to the information given above
- Set up different prices per customer segment for :

Product : Intervinyl#2

Sale Price for Public : 18 \$CAN

Sale Price for Premium Customers : 16 \$CAN

Sale Price for Platinum Customers : 14 \$CAN

Sale Price for Gold Customers: 11,50 \$CAN

- Create a new customer and assign a price list that you previously created

Workplan

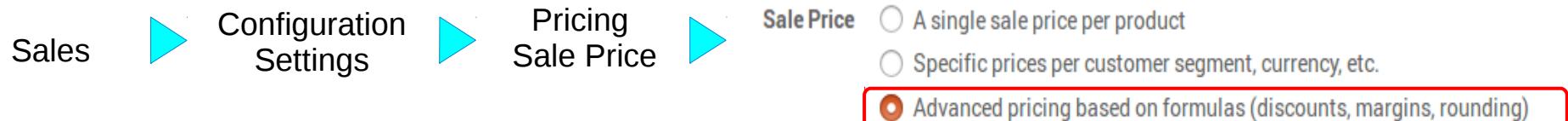
- **Pricelist & discounts**

- A single sale price per product
- Prices per customer segment
- Advanced pricing & discounts

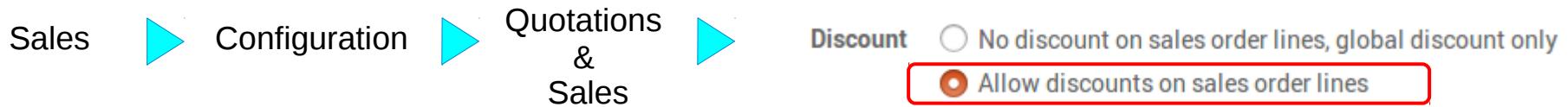
odoo Sales – Advanced pricing & discounts

Steps to set up advanced pricing and discounts based on formulas:

1. Set up sale price



2. Set up discounts on sales order lines



odoo Sales – Advanced pricing & discounts

3. Set discounted price lists

The screenshot illustrates the process of creating a new pricelist in Odoo Sales. On the left, a modal window titled "Pricelists / New" shows the configuration of a new pricelist named "e.g. USD Retailers". The "Discount policy" is set to "Discount included in the price". The "Currency" is CAD, and it is "Allow to use on My Website". A red box highlights the "Pricelist Items" section, which lists "All Products" with a minimum quantity of 1 and a price of "0.0 % discount and 0.0 surcharge". A red arrow points from this section to a secondary window titled "Open: Pricelist Items". This window displays the "All Products" section with the same settings. It also includes sections for "Price Computation" (with "Compute Price" set to "Formula") and a table for "Based on" (with "New Price = Public Price - Price Discount" and "Rounding Method 0.00"). At the bottom of both windows are "SAVE" and "DISCARD" buttons.

Exercise – Sales price with discounts on sales orders

Canadian Colors sells solutions for the agricultural, industrial, construction and decoration sectors. In Ontario, the paint dealer « Paintcolor » showed interest in buying a lot of 300 units (each unit is a gallon of 6 kg) of the new ecological painting « **HomeColor** ».

Canadian Colors would like to send them a quotation for those products with a sale price of ***13\$CAN per unit with a 7% discount for the purchase of the product more than 100 units + 20% discount of the Gold Customers interested in buying this new product. This discount is only valid for 30 days.***

The product delivery will be at the customer's warehouse located in Ontario.

Exercise – Sales price with discounts on sales orders

TO DO

- Register the new product “HomeColor”
- Set up the pricelist for Gold Customers with discounts of this new product
- Classify the customer « Paintcolor » with the pricelist Gold Customer
- Using the above information, create a quotation and send it by email to this customer
- Create a sales order
- Generate partial deliveries from sales order
- Generate an invoice

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Quotation & Sales Order

odoo Sales - Quotation

Sales Dashboard Sales Invoicing Reports Configuration ictformation@savoirfairelinux.com

Quotations / New

SAVE DISCARD

SEND BY EMAIL PRINT CONFIRM SALE CANCEL

QUOTATION QUOTATION SENT SALES ORDER

New

Customer: Canadian Art Inc

Order Date: 02/22/2017 22:49:55

Expiration Date: 03/03/2017

Pricelist: Public Pricelist (CAD)

Payment Terms: 30 Net Days

ORDER LINES OTHER INFORMATION

Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Unit Price	Taxes	Discount (%)	Subtotal
Korazar#1 (Blue)	Korazar#1 (Blue)	200.000	gal(s)		12.00	GST for sales - 5%	0.00	2,400.00

Add an item

Setup default terms and conditions in your company settings.

Untaxed Amount : 2,400.00\$

Taxes : 120.00\$

Total : (update) 2,520.00\$

odoo Sales - Sales Order

The screenshot shows the Odoo Sales module interface for a quotation. The top navigation bar includes links for Sales, Dashboard, Sales, Invoicing, Reports, and Configuration. The user is logged in as ictformation@savoirfairelinux.com.

The main content area displays a quotation with the identifier SO002. The top toolbar contains buttons for SAVE, DISCARD, CREATE INVOICE, PRINT, SEND BY EMAIL, CANCEL, and LOCK. A red box highlights this toolbar. To the right, a breadcrumb navigation shows the progression from QUOTATION to QUOTATION SENT to SALES ORDER, with a red box highlighting the final step. A large red arrow points upwards towards the quotation details.

Quotation Details:

- Customer:** Canadian Art Inc
- Confirmation Date:** 02/22/2017 22:55:19
- Pricelist:** Public Pricelist (CAD)
- Payment Terms:** 30 Net Days

Order Lines:

Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Unit Price	Taxes	Discount (%)	Subtotal
+ Korazar#1 (Blue)	Korazar#1 (Blue)	200.000	gal(s)		12.00	GST for sales - 5%	0.00	2,400.00

Other Information:

Setup default terms and conditions in your company settings.

Untaxed Amount :	2,400.00\$
Taxes :	120.00\$
Total :	2,520.00\$



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**Delivery & Invoicing
Management**

odoo Sales - Delivery

Sales Dashboard Sales Invoicing Reports Configuration ictformation@savoirfairelinux.com

Quotations / S0002 / WH/OUT/00001

EDIT **CREATE** Print ▾ Attachment(s) ▾ Action ▾ 1 / 1 < >

VALIDATE **PRINT** **CANCEL** **UNRESERVE** **SCRAP**

DRAFT ⟳ WAITING AVAILABILITY ⟳ PARTIALLY AVAILABLE ⟳ AVAILABLE ⟳ DONE

WH/OUT/00001

Partner: Canadian Art Inc Scheduled Date: 02/22/2017 22:49:55
Source Document: S0002

OPERATIONS INITIAL DEMAND ADDITIONAL INFO

Product	Unit of Measure	To Do	Done
Korazar#1 (Blue)	gal(s)	200.000	0.000

Sales Dashboard Sales Invoicing Reports Configuration ictformation@savoirfairelinux.com

Quotations / S0002 / WH/OUT/00001

SAVE **DISCARD** 1 / 1 < >

VALIDATE **PRINT** **CANCEL** **UNRESERVE** **SCRAP**

DRAFT ⟳ WAITING AVAILABILITY ⟳ PARTIALLY AVAILABLE ⟳ AVAILABLE ⟳ DONE

WH/OUT/00001

Partner: Canadian Art Inc Scheduled Date: 02/22/2017 22:49:55
Source Document: S0002

OPERATIONS INITIAL DEMAND ADDITIONAL INFO

Product	Unit of Measure	To Do	Done
Korazar#1 (Blue)	gal(s)	200.000	0.000

Add an item

Done

1

odoo Sales – Delivery (Back Order)

Sales Dashboard Sales Invoicing Reports Configuration

Quotations / SO002

EDIT CREATE

Print ▾ 1 Attachment(s) ▾ Action ▾

2 / 2 ◀ ▶

CREATE INVOICE PRINT SEND BY EMAIL CANCEL LOCK

QUOTATION QUOTATION SENT SALES ORDER

SO002

Customer: Canadian Art Inc Confirmation Date: 02/22/2017 22:55:19
Pricelist: Public Pricelist (CAD)
Payment Terms: 30 Net Days

ORDER LINES OTHER INFORMATION

Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Unit Price	Taxes	Discount (%)	Subtotal
Korazar#1 (Blue)	Korazar#1 (Blue)	200.000	gal(s)		12.00	GST for sales - 5%	0.00	2,400.00

Untaxed Amount: 2,400.00\$
Taxes: 120.00\$
Total: 2,520.00\$

A red box highlights the "Delivery" button in the top right corner of the quotation view, and a red arrow points from this box down to the "Stock Operations" section in the second screenshot.

Sales Dashboard Sales Invoicing Reports Configuration

Quotations / SO002 / Stock Operations

Search... ▾

CREATE IMPORT

Reference Destination Location Zone Partner Scheduled Date Source Document Back Order of Status

WH/OUT/00002	Partner Locations/Customers	Canadian Art Inc	02/22/2017 22:49:55	SO002	WH/OUT/00001	Available
WH/OUT/00001	Partner Locations/Customers	Canadian Art Inc	02/22/2017 22:49:55	SO002		Done

odoo Sales – Invoice

Quotation

Sales Order

Delivery

Invoice

→ Invoice based on delivered quantity

The screenshot shows the Odoo Sales module interface. At the top, there's a navigation bar with tabs: Sales, Dashboard, Sales, Invoicing, Reports, Configuration. Below it, a sub-menu for 'Quotations / SO002' is displayed. On the left, there are buttons for EDIT, CREATE, and CREATE INVOICE (which is highlighted with a red box). In the center, there's a main content area for quotation SO002, showing details like Customer (Canadian Art Inc), Confirmation Date (02/22/2017 22:55:19), and Pricelist (Public Pricelist (CAD)). Below this, there are tabs for ORDER LINES and OTHER INFORMATION. The ORDER LINES tab shows one item: Korazar#1 (Blue) with a quantity of 200.000 gal(s), unit price of 12.00, and taxes of GST for sales - 5%, resulting in a subtotal of 2,400.00. The OTHER INFORMATION tab shows financial summary lines: Untaxed Amount: 2,400.00\$, Taxes: 120.00\$, and Total: 2,520.00\$. On the right side of the main content area, there's a context menu with options: Delete, Duplicate, and Invoice Order (also highlighted with a red box). At the bottom right, there are status indicators: QUOTATION, QUOTATION SENT, and SALES ORDER.



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Online Sales

Definition of E-Commerce

- E-Commerce is a transaction of buying or selling online.

<https://en.wikipedia.org/wiki/E-commerce>

- Commercial transactions conducted electronically on the Internet.

<https://en.oxforddictionaries.com/definition/us/e-commerce>

- Business conducted through the use of computers, telephones, fax machines, barcode readers, credit cards, automated teller machines (ATM) or other electronic appliances (whether or not using the internet) without the exchange of paper-based documents. It includes activities such as procurement, order entry, transaction processing, payment, authentication and non-repudiation, inventory control, order fulfillment, and customer support. When a buyer pays with a bank card swiped through a magnetic-stripe-reader, he or she is participating in e-commerce.

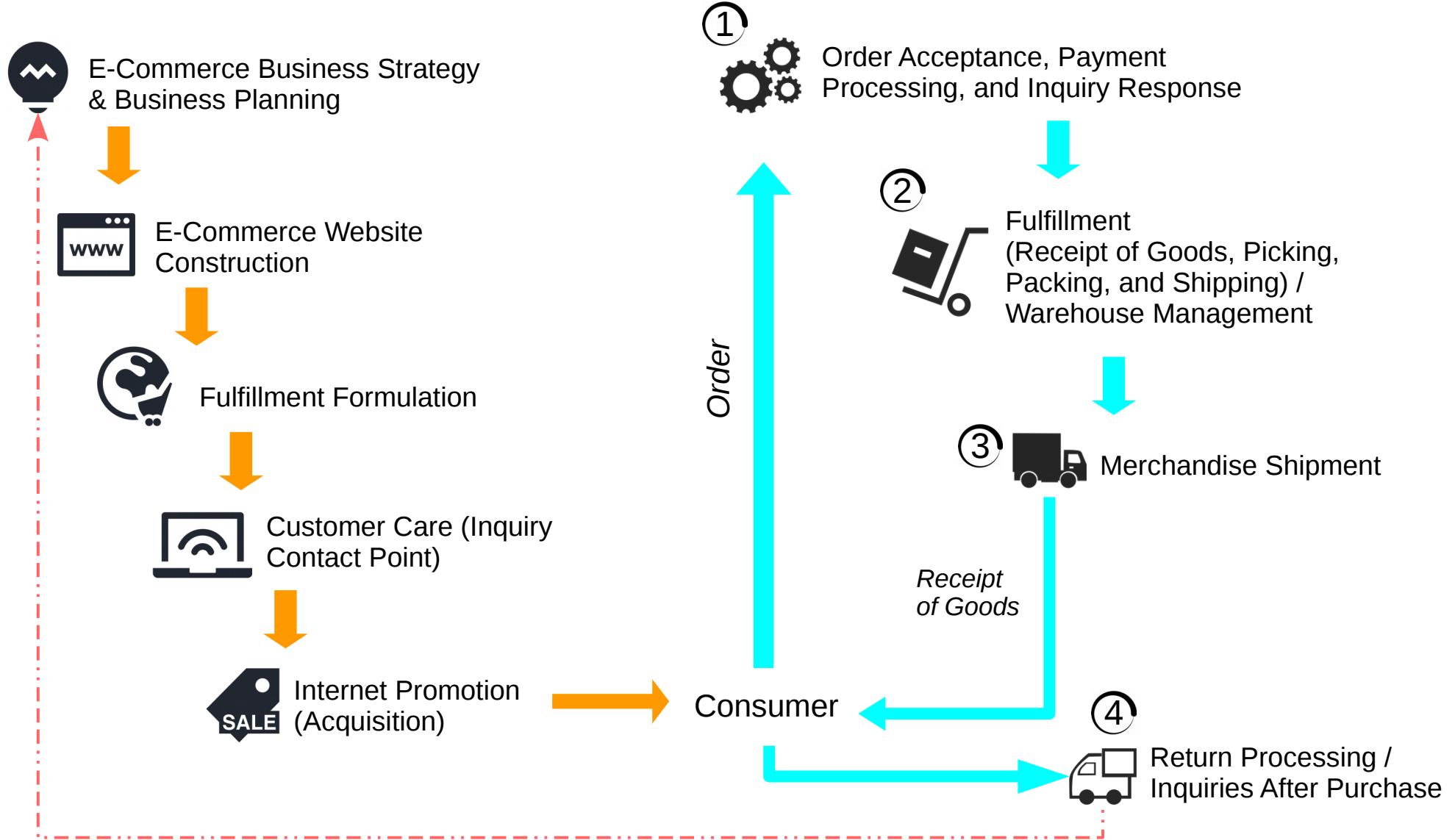
<http://www.businessdictionary.com/definition/electronic-commerce-E-Commerce.html>

Types of E-Commerce/E-Business

B2B Business to Business <ul style="list-style-type: none">· Paypal (and B2C, B2B2C)· Optize (and B2C)· Alibaba Group	B2C Business to Consumer <ul style="list-style-type: none">· Amazon· FreshDirect· Zynga (and C2C)	B2G Business to Government « E-Procurement »
C2B Consumer to Business <ul style="list-style-type: none">· Zonzoo· Fotolia· Google Adsense	C2C Consumer to Consumer <ul style="list-style-type: none">· Prosper (P2P loans)· eBay· Facebook	C2G Citizen to Government <ul style="list-style-type: none">· Agencia Tributaria (Tax Agency online)
G2C Government to Citizen « E-Government » <ul style="list-style-type: none">· AEPM· Certificado Digital	G2B Government to Business « E-Government » <ul style="list-style-type: none">· eDNI· USA.gov (and G2B)	G2G Government to Government <ul style="list-style-type: none">· Government Gateway· Schengen Information System

- *Not easy to classify*
- *Many real e-business models fall into multiple catégories*

E-Commerce Process



Exercise – Online Service Sale

Canadian Colors has a great sales experience of its products and services online that allows a wide coverage at the national level.

Through its website, customers located in Ontario and Quebec can purchase and schedule services without having to travel to the nearest store. On the other hand, Canadian Colors sells and delivers products to any city in Canada.

Services Category

- Tool Rental
- Design Center
- Cutting of materials
- Product on request

Exercise – Online Service Sale

Canadian Colors provides customers with necessary tools and machinery to complete, repair, remodeling or construction projects that customers have in mind. Customers will be able to ask all their questions through the online chat to highly qualified consultants who will be willing to solve all their concerns and give you the best advice to carry out their projects.

For this exercise, students will take two different roles. First, you will play the role of customer to buy products online, then you will play the role of Canadian Colors' employee to confirm the sales.

Exercise – Online Service Sale

- ***CUSTOMER ROLE - Steps to rent a tool online:***
- *From Canadian Colors' website, select and quote on-line a tool from the list of tools (e.g Rotary Hammer Drill or Freem Mini Air Compressor)*
- *Add to cart the tool that you have selected.*
- *Continue the checkout process for this product*
- *Fill out the contact form (all fields are mandatory)*
- *Choose any kind of payment terms and confirm the purchase of the service*

odoo Site web – Online sales

The screenshot shows a website built on the Odoo platform. The left sidebar is dark with an orange vertical bar on the left. It features the 'odoo' logo at the top, followed by navigation links: HOME, SHOP, CONTACT US, and SIGN IN. Below these are two small circular icons: one with an 'i' and another with an envelope.

The main content area has a light gray background. At the top, there's a breadcrumb navigation 'Products / Rotary Hammer Drill' and a search bar with placeholder text 'Search...' and a magnifying glass icon.

The central part of the page displays a product image of a black and silver rotary hammer drill. To its right, the product name 'Rotary Hammer Drill' is displayed in large, bold, black font. Below the name is the price '15.00 \$'. Underneath the price are quantity selection buttons (minus, plus) and an 'ADD TO CART' button in orange.

Further down, the SKU number 'SKU #D114857' is listed. At the bottom of the main content area, there are promotional text blocks: '30-day money-back guarantee', 'Free Shipping in U.S.', and 'Buy now, get in 2 days'.

The footer section is divided into three columns:

- Our Products & Services**: Includes a 'Home' link.
- Connect with us**: Includes a 'Contact us' link, a phone icon, and an email address: ictformation@savoirfairelinux.com.
- Canadian Colors Inc - About us**: Includes a 'SUBSCRIBE' button and a text block: 'We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.' Below this, another text block says: 'Our products are designed for small to medium size companies willing to optimize their performance.'

At the very bottom, there's a copyright notice 'Copyright © Canadian Colors Inc' and a 'Create a free website with odoo' link.

odoo Sales – Online shopping process

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HOME
SHOP
CONTACT US
MY CART 1
SIGN IN

CONTINUE SHOPPING

Shopping Cart

Product	Quantity	Price
Rotary Hammer Drill SKU #D114857 Remove	<input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/>	15.00 \$

Subtotal: 15.00 \$
Taxes: 0.75 \$
Total: 15.75 \$

[PROCESS CHECKOUT →](#)

Policies

30-days money-back guarantee
 Invoice sent by e-Mail

Secure Payment

256 bit encryption
 Processed by Ogone

Our Products & Services

[Home](#)

Connect with us

[Contact us](#)

ictformation@savoirfairelinux.com

Canadian Colors Inc - [About us](#)

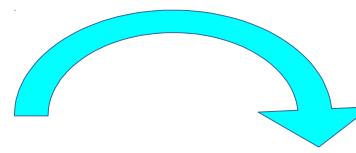
[SUBSCRIBE](#)

We are a team of passionate people whose goal is to improve everyone's life through disruptive products. We build great products to solve your business problems.

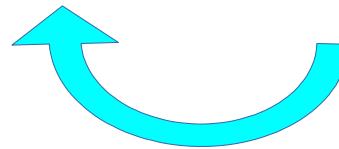
Our products are designed for small to medium size companies willing to optimize their performance.

Create a [free website](#) with [odoo](#)

Exercise – Online Service Sale



CANADIAN COLORS' EMPLOYEE ROLE - CUSTOMER ROLE



- ***Now it is time to change roles***

Exercise – Online Service Sale

CANADIAN COLORS' EMPLOYEE ROLE

- Go into the Sales module, to confirm the quotation generated by the system as a result of the customer's online purchase.
- Validate product and quantities to confirm the sales order
- Generate the delivery order confirming the available quantities of the product
- Create and send by email the invoice
- Confirm the delivery of the rented product by the customer

odoo Sales – Confirm quotation and generate purchase order

Sales Dashboard Sales Invoicing Leads Management Reports Configuration

Quotations

CREATE IMPORT

Quotation Number	Order Date	Requested Date	Commitment Date	Customer	Salesperson	Total	Status
S0061	12/06/2016 18:52:02		12/06/2016 18:52:02	YourCompany, Administrator		1,799.00	Quotation Sent
S0060	12/06/2016 18:23:41		12/06/2016 18:23:41	Agrolait	Administrator	14.72	Sales Order
S0059	12/06/2016 18:21:18		12/06/2016 18:21:18	Agrolait	Administrator	10,590.00	Sales Order
S0058	12/06/2016 18:12:13			YourCompany, Administrator		0.00	Quotation
S0057	12/06/2016 17:34:49		12/06/2016 17:34:49	Agrolait	Administrator	10,590.00	Sales Order
S0056	12/06/2016 17:14:55		12/06/2016 17:14:55	YourCompany, Administrator		132.00	Sales Order
S0055	12/06/2016 17:01:06		12/06/2016 17:01:06	YourCompany, Administrator		4.50	Quotation Sent
S0054	12/06/2016 16:20:10		12/06/2016 16:20:10	Agrolait	Administrator	58.87	Sales Order
S0053	12/06/2016 14:10:36		12/06/2016 14:10:36	Agrolait	Administrator	10.15	Sales Order
S0052	12/06/2016 14:09:46		12/06/2016 14:09:46	Agrolait	Administrator	10.15	Sales Order
S0051	12/06/2016 14:08:29		12/06/2016 14:08:29	Agrolait	Administrator	10.15	Sales Order
S0050	12/06/2016 12:25:26		12/06/2016 12:25:26	China Export	Demo User	7,315.00	Sales Order
S0049	12/06/2016 11:43:13		12/06/2016 11:43:13	My customer	Administrator	4,493.88	Quotation Sent
S0048	12/06/2016 10:47:40		12/06/2016 10:47:40	Agrolait	Administrator	145.40	Sales Order
S0047	12/06/2016 10:47:20		12/06/2016 10:47:20	YourCompany, Administrator		960.00	Quotation Sent
Test/001	12/06/2016 08:56:12		12/06/2016 08:56:12	China Export	Demo User	7,315.00	Sales Order
S0007	12/06/2016 08:56:12		12/06/2016 08:56:12				
S0006	12/06/2016 08:56:12		12/06/2016 08:56:12				
S0004	12/06/2016 08:56:11		12/06/2016 08:56:11				
S0003	12/06/2016 08:56:11		12/06/2016 08:56:11				
S0012	11/06/2016 09:01:00		11/06/2016 09:01:00				
S0011	11/06/2016 09:01:00		11/06/2016 09:01:00				
S0005	11/06/2016 08:56:00		11/06/2016 08:56:00				
S0002	11/06/2016 08:56:00		11/06/2016 08:56:00				

Sales Dashboard Sales Invoicing Leads Management Reports Configuration

Quotations / S0061

EDIT CREATE

CONFIRM SALE (highlighted with a red box)

Print ▾ 1 Attachment(s) ▾ Action ▾

1 / 25 < >

QUOTATION QUOTATION SENT SALES ORDER

S0061

Customer: YourCompany, Administrator
215 Vine St
Scranton PA 18503
United States

Quotation Template: Default Template

Order Date: 12/06/2016 18:52:02
Expiration Date:
Pricelist: USD (USD)
Payment Terms: Immediate Payment
Delivery Method: Free delivery charges
Subtotal: \$0.00 ➔ Set price

ORDER LINES SUGGESTED PRODUCTS OTHER INFORMATION

Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Route	Unit Price	Cost	Taxes	Discount (%)	Subtotal
[E-COM09] iMac	2.7GHz quad-core Intel Core i5 Turbo Boost up to 3.2GHz 8GB (two 4GB) memory 1TB hard drive Intel Iris Pro graphics	1.000	Unit(s)			1,799.00	1,299.00	0.00	0.00	1,799.00
Free delivery charges	Free delivery charges	1.000	Unit(s)			0.00	0.00	0.00	0.00	0.00

Untaxed Amount : \$1,799.00
Taxes : \$0.00
Total : \$1,799.00
Payment Acquirer : Wire Transfer
Transaction : S0061

odoo Sales – Generate delivery order

The diagram illustrates the process of generating a delivery order from a sales quotation in Odoo. It consists of two screenshots connected by red arrows.

Sales Quotation Screen: The top screenshot shows the 'Quotations' screen for quotation S0061. Key details include:

- Customer:** YourCompany, Administrator, 215 Vine St, Scranton PA 18503, United States.
- Confirmation Date:** 12/06/2016 19:23:25.
- Price List:** USD (USD).
- Payment Terms:** Immediate Payment.
- Delivery Method:** Free delivery charges \$0.00.

Order Lines:

Product	Description	Ordered Qty	Unit of Measure	Analytic Tags	Route	Unit Price	Cost	Taxes	Discount (%)	Subtotal
[E-COM09] iMac	2.7GHz quad-core Intel Core i5 Turbo Boost up to 3.2GHz 8GB (two 4GB) memory 1TB hard drive Intel Iris Pro graphics	1.000	Unit(s)			1,799.00	1,299.00	0.00	0.00	1,799.00
Free delivery charges	Free delivery charges	1.000	Unit(s)			0.00	0.00	0.00	0.00	0.00

Delivery Summary:

Untaxed Amount:	\$1,799.00
Taxes:	\$0.00
Total:	\$1,799.00

Payment Acquirer: Direct Transfer
Transaction: S0061

Delivery Status: 1 Delivery

Delivery Order Screen: The bottom screenshot shows the 'Quotations / S0061 / WH/OUT/00065' screen. Key details include:

- Partner:** YourCompany, Administrator.
- Scheduled Date:** 12/06/2016 18:52:02.
- Source Document:** S0061.
- Operations:** Initial Demand.
- Product:** [E-COM09] iMac.
- Unit of Measure:** Unit(s).
- From:** Stock.
- To:** Customers.
- To Do:** 1.000.
- Done:** 1.

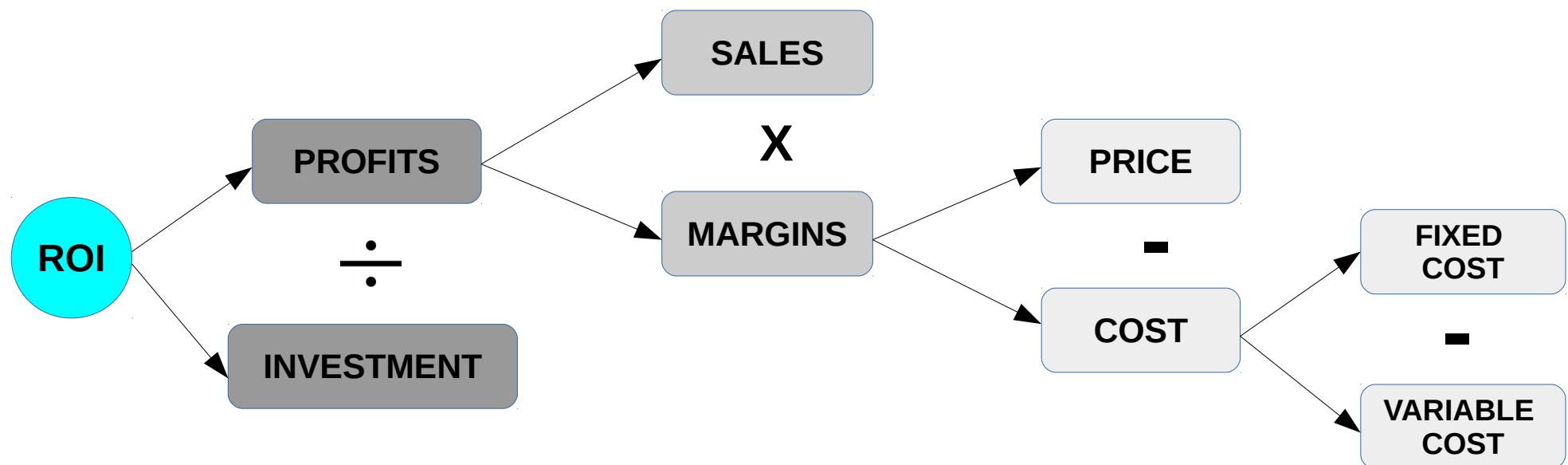
A red arrow points from the 'Delivery' status in the quotation to the 'VALIDATE' button in the delivery order screen. Another red arrow points from the 'Available' status in the delivery order screen back to the 'Delivery' status in the quotation.

odoo

**ROI & Tracking marketing
campaign**

Return on Investment – ROI

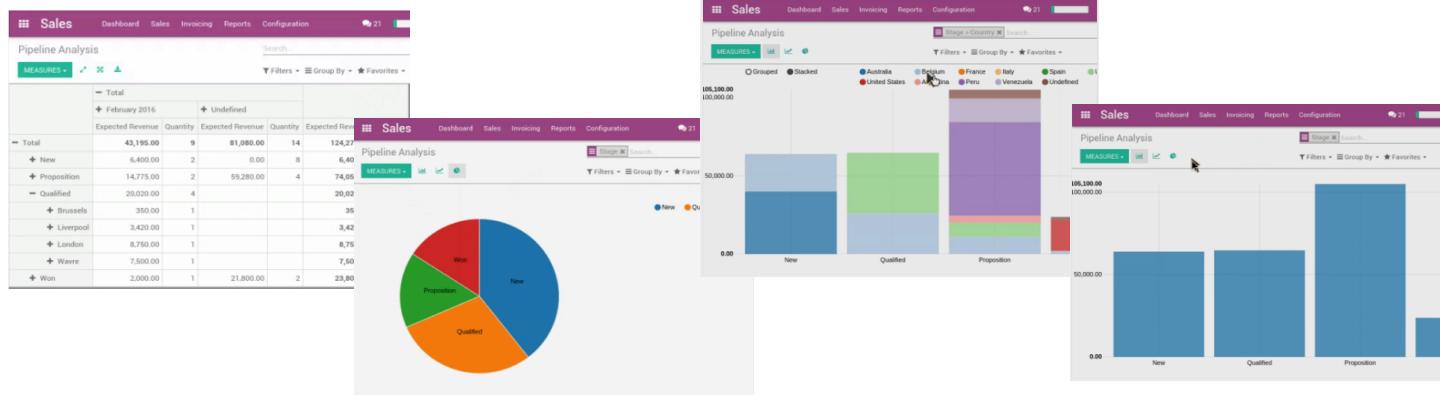
Return on investment (ROI) is a measure of the profit earned from each investment. It is typically expressed as a percentage.



odoo Sales – Marketing ROI Calculation

You can calculate your ROI by following opportunities through Odoo CRM and analyzing :

- the conversation rate,
- the expected revenue,
- and the generated revenue of each campaigns.



Example – Marketing ROI Calculation

Example applied according to the launching campaign of the new product « HomeColor » of « Canadian Colors Inc ».

Basic Calculation with CGOs

Total Marketing investment

6 500,00 \$

A

Total units sold

3500

Price per unit

13,00 \$

Discounts

20%

Allowance (New Product)

7%

Quantity discount

9,49

Final Price per unit

9,49

Total revenue

33 215,00 \$

B

Costs of goods per unit

4,33 \$

Total COGS

15 155,00 \$

C

Gross Profit (B-C)

18 060,00 \$

D

ROI : (D-A)/A

177,85%

odoo Sales – Tracking marketing campaigns

Odoo allows tracking mass-mailings through performance indicators.

The screenshot shows the Odoo Mass Mailing interface for a campaign named "test 123". The top navigation bar includes links for Mass Mailings, Campaigns, Reports, and Configuration, along with user information and a search bar. Below the header, there are buttons for EDIT, CREATE, TEST MAILING, and RETRY, and a progress bar indicating 2 / 4 steps completed. The main area displays the following information:

- Performance Metrics:** A row of six circular progress bars showing the status of sent emails:
 - 4 Emails Sent (60% Received, 60% Opened, 40% Replied, 0% Clicks, 20% Bounced)
- From:** jjjezequelbread@gmail.com<>jjjezequelbread@gmail.com>
- Subject:** test 123
- Recipients:** Leads / Opportunities, 6 selected records, SEE SELECTION ➔
- MAIL BODY:** Options include "Your Logo" and a "DISCOVER" button.
- Email Preview:** A large preview window shows the email content. It features a "New Arrivals" section with a guitar image and a "Gibson Les Paul Junior" product card below it. Another section shows a television and a speaker setup with the text "Sony BDVE210".

odoo Sales Reports

The screenshot shows the Odoo Sales Reports interface. At the top, there's a purple header bar with the 'Sales' icon and the word 'Sales'. Below it, a sub-header bar has tabs for 'Dashboard', 'Sales', 'Invoicing', 'Reports', and 'Configuration'. The main area is titled 'Leads Analysis'. A green button labeled 'MEASURES' with a dropdown arrow is visible. To its right are three small icons: a checkmark, a cross, and a download arrow. Below these are two tables. The first table has a header row with 'Total', 'Count', 'Count', and 'Count'. It contains two rows: one for 'Total' and one for '+ December 2016'. The second table has a header row with '+ Total', '+ Direct Sales', '+ Indirect sales', and 'Count'. It also contains two rows: one for 'Total' and one for '+ December 2016'. The data from the second table is partially obscured by a large gray rectangular overlay.

Odoo allows you to have a quick overview on your leads, and analyze them with the axis you want. In the given example, the axis is sales team.

The Reports feature allows you to easily create analysis directly from Odoo.

This screenshot shows the same Odoo Sales Reports interface as the first one, but with a context menu open over the '+ Indirect sales' button in the 'MEASURES' dropdown. The menu is a vertical list of fields: 'Active', 'Assignation Date', 'Campaign', 'City', 'Close Date', 'Company', 'Conversion Date', 'Country', 'Creation Date', 'Expected Closing', and 'Last Stage Update'. The '+ Indirect sales' button is highlighted with a red box. The rest of the interface is identical to the first screenshot.

odoo Sales Reports



Leads Analysis

	Total					
	+ Direct Sales	+ Indirect sales				
- Total	6	13.33	2	30.00	8	17.50
+ December 2016	6	13.33	2	30.00	8	17.50

You can choose one or several measure units, depending on what information and analysis you need.

MEASURES ▾

- ✓ Probability
- Probable Turnover
- Delay to Assign
- Delay to Close
- Total Revenue
- Overpassed Deadline
- # of Activities
- ✓ Count

	Total				
	+ Direct Sales	+ Indirect sales			
Probability	13.33	2	30.00	8	17.50
Count	13.33	2	30.00	8	17.50

odoo Sales Reports

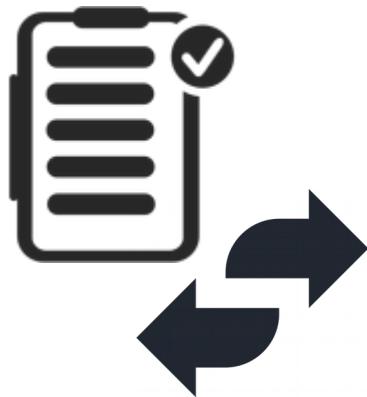
Sales Analysis

MEASURES ▾ ✓ ✎ ⌂

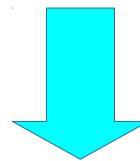
	Total		
	+ Direct Sales	+ Indirect Sales	
	Untaxed Total	Untaxed Total	Untaxed Total
- Total	17,020.01	6,284.09	23,304.10
+ January 2017	2,296.63		2,296.63
+ February 2017	14,723.37	6,284.09	21,007.46

odoo

Customer Satisfaction



Why Customer satisfaction is important



Net Promoter Score vs. Satisfaction Surveys

Net Promoter Score

How likely would you recommend us to a friend?

DETRACTORS

0 1 2 3 4 5 6

NOT LIKELY
TO RECOMMEND

PASSIVES

7 8

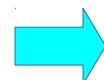
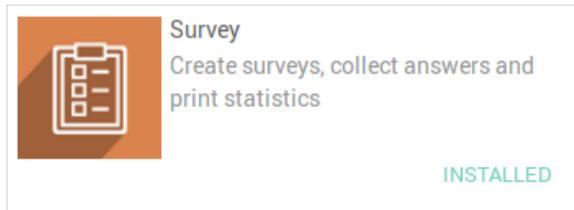
PROMOTERS

9 10

EXTREMELY LIKELY
TO RECOMMEND

NPS = %  - 

odoo Sales – Survey



Manage automate appraisals, satisfaction surveys, marketing campaign, feedback forms, etc.

A screenshot of the Odoo Surveys application. The top navigation bar is purple with tabs for 'Surveys' and 'Configuration'. Below the bar, the page title is 'Surveys / User Feedback Form'. There are buttons for 'EDIT' (highlighted), 'CREATE', 'DESIGN SURVEY', 'TEST SURVEY', 'PRINT SURVEY', 'SHARE AND INVITE BY EMAIL', 'VIEW RESULTS', 'DRAFT', 'IN PROGRESS', 'CLOSED', and 'PERMANENT'. A progress indicator shows '1 / 4 < >'. The main content area is titled 'User Feedback Form'. It shows a table with four rows under 'Edit Pages and Questions' and 'OPTIONS'. The first row is 'Page Title' with 'About your Odoo usage' and 'Questions (2 records)'. The second row is 'Ergonomics and ease of use' with 'Questions (7 records)'. The third row is 'Community and contributors' with 'Questions (3 records)'. The fourth row is 'Questions for developers' with 'Questions (1 records)'.

Example – Customer Satisfaction Survey

“Canadian Colors Inc” wants to evaluate the service provided by its by its employees in the sales department. For this, the company has designed a survey that will be completed by customers once their purchase is completed. Take the information of the following survey and design one in Odoo Survey.

Customer Satisfaction Survey

Tell Us About Your Experience

How satisfied were you with our service today?

- Very Satisfied
- Satisfied
- Not Satisfied

Is this the first time you have used our service?

- Yes
- No

If you have used our service before, how many times in the past year?

Would you recommend us to a friend?

- Yes
- No

odoo Sales - Survey

Surveys Surveys Answers Configuration

Surveys / New

SAVE DISCARD

DESIGN SURVEY

DRAFT IN PROGRESS CLOSED PERMANENT

Title
Customer Satisfaction Survey

EDIT PAGES AND QUESTIONS OPTIONS

Page Title Questions

Add an item

Create: Pages

Page Title
Customer Satisfaction Survey

Question Name Type of Question Mandatory Answer

Add an item

SAVE & CLOSE SAVE & NEW DISCARD

A screenshot of the Odoo Surveys module. The main window shows a survey titled 'Customer Satisfaction Survey'. A red arrow points from the 'Add an item' button in the main window down to the 'Add an item' button in the 'Create: Pages' modal. The modal has a title 'Create: Pages' and contains a single section for a 'Page Title' with the value 'Customer Satisfaction Survey'. At the bottom of the modal are three buttons: 'SAVE & CLOSE', 'SAVE & NEW', and 'DISCARD'.

odoo Sales - Survey

Open: Questions X

Question name
How satisfied were you with our service today? S

Type of Question Multiple Lines Text Box
 Single Line Text Box
 Numerical Value
 Date and Time
 Multiple choice: only one answer
 Multiple choice: multiple answers allowed
 Matrix

answer
answer
answer

ANSWERS **OPTIONS**

Choices
Very Satisfied Edit
Add an item

SAVE **DISCARD**

ANSWERS **OPTIONS**

Constraints

Mandatory Answer Error message This question requires an answer. ?

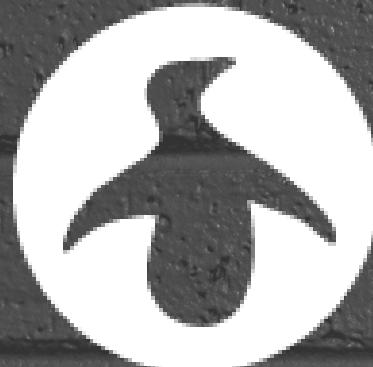
Display mode
Format
Number of columns

Allow Comments
Show Comments Field

SAVE **DISCARD**

Questions?





Savoir-faire
LINUX®

Solutions de gestion informatique

LICENCE : CC-BY-NC-SA