



Savoir-faire  
**LINUX**®



odoo

ICTC Training program

# Versioning

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| <b>Version</b> | <b>Date de version</b> | <b>Auteur / Contributeurs</b>                                   | <b>Nature des modifications</b> |
|----------------|------------------------|---|---------------------------------|
| 2.1            | 2017-03-01             | Carolandrea Guerrero<br>Mickaël Brard<br>Julien Jézéquel-Bréard | Diffusion initiale              |
|                |                        |   |                                 |
|                |                        |   |                                 |

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Customer Relationship Management

# Outcomes

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- Generating, managing and converting leads into opportunities.
- Managing Sales teams determining optimal sales organization size, structure, and deployment.
- Converting and managing key sales activities from leads to quotes.
- Using email marketing for marketing campaigns to customers and prospects.
- Adding value to create customer intimacy and long-term loyalty (customer database).
- Achieving and maintaining a superior level of customer service and support.

# CRM Strategies

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## CRM Strategies

### 1. Customer Acquisition

- Sales teams/channels
- Sales cycle
- Call Center / Contact Form
- Lead Workflow Management
- Campaign Management
- Newsletter

### 2. Customer Retention

- Customer Knowledge
- Customer Segmentation
- Customer Lifecycle Management
- Tracking

### 3. Customer Service

- Customer Care / Loyalty
- Satisfaction Inquiry
- Customer Support
- Surveys / Quality

### 4. Improvement

- KPI's
- Marketing Strategies
- Loyalty Programs
- Sales Strategies

# odoo CRM

Odoo allows tracking all data about each lead in order to optimize the conversion rate.

| Core Process                    | Features  |
|---------------------------------|---|
| Sales Team Management           | <ul style="list-style-type: none"><li>→ Manage sales team</li><li>→ Manage salespeople</li><li>→ Gamification tool</li></ul>  |
| Customer Management             | <ul style="list-style-type: none"><li>→ Adress Book</li><li>→ Customer Preferences</li><li>→ Multi-Adress Support</li><li>→ Full History</li></ul>                            |
| Lead Management                 | <ul style="list-style-type: none"><li>→ Lead Scoring</li><li>→ Mass Mailing</li><li>→ Call-to-actions</li><li>→ URL Tracker</li></ul>   |
| Opportunities Management        | <ul style="list-style-type: none"><li>→ Activities &amp; Calls Management</li><li>→ Pipeline Management</li><li>→ Stage Customization</li><li>→ Meetings Scheduling</li></ul> |
| Communication & Reporting Tools | <ul style="list-style-type: none"><li>→ Integrated VOIP</li><li>→ Call Logs</li><li>→ Email Gateways</li><li>→ Custom Dashboards</li></ul>                                    |

# CMR – Leads & Opportunities Mgmt

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# odoo

# Case Study

# Case Study

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- « Canadian Colors Inc » is a small company that counts with distribution centers, service and development of products through Ontario and Quebec.
- **OBJECTIVE** → manufacture and commercialization of agrochemicals, paints, emulsions, resins and products for the treatment of metals.

## Business Units

- Agriculture
- Industry
- Construction
- Decoration

## Manufacturing & Warehouses



« Canadian Colors Inc »

Toronto



« Canadian Colors Inc »

Montréal

## Sales channels

### Indirect

- Network of resellers  
(Wholesale distributors and  
Independent representatives)

### Direct

- (9) Sales representatives
- (6) Points of Sales - « Colors Stores »
- Website

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# Customer Acquisition

# Exercise – Customer Acquisition

Last week, Canadian Colors participated in « Toronto Home Expo ». This event showcases products from Building Construction, Chemicals & Dyes, Home Furnishings & Home Textiles, Architecture & Designing, Real Estate Agents industries. Among the visitors were professional retailers (specialty shops, resale of construction materials and home centers), architects, decorators, interior designers, engineers, paint specialists, chemists, paint companies, owners and managers of tinplate and repainting workshops automotive, among other industries in general.

Canadian Colors shows its last new product to the market and obtained potential sales contacts or prospects interested in this particular product. The company would like to manage its sales funnel, track leads, close opportunities and get accurate forecasts with CRM Odoo.

In addition, the company made an email marketing to launch the new product in all its sales channels.

# Exercise – Customer Acquisition

## TO DO

- *Create a new team member into sales team (Direct – Indirect – Web).*
- *Create leads from this event and assign to the salespeople. If you want you can create new salespeople.*
- *Use tags to better qualify lead's interests.*
- *Open a lead and convert it into an opportunity. The contact is automatically set as a customer.*
- *Simulate and manage customer interactions from an opportunity like internal notes, meetings, and calls.*
- *Customize your pipeline creating a new stage (e.g. lost)*
- *In the pipeline, you can drag & drop opportunities between stages. You can verify the stage of an opportunity is changed automatically.*
- *Add more information like next actions, an expected closing date and expected revenues.*

# odoo CRM – Sales Team Management

## → Configuration ➤ Sales Team & Team Members

The screenshot shows the Odoo CRM interface for Sales Team Management. The top navigation bar includes Sales, Dashboard, Sales, Invoicing, Reports, and Configuration. The user is logged in as ictcformation@savoirfairelinux.com.

The main view displays the "Sales team" configuration for the "Direct Sales" team. The team is active and has the following settings:

- Quotations, Invoices, Leads, Opportunities are checked.
- Team Leader: Email Alias is set to sales @edu-ictc.odoo.com.
- TEAM MEMBERS: A list containing ictcformation@savoirfairelinux.com, with an "ADD" button highlighted by a red arrow.

A large red circle with the number "1" is drawn around the "ADD" button. A red arrow points from this circle to the "Create: Team Leader" modal window, which is overlaid on the main screen.

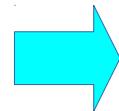
The "Create: Team Leader" modal contains the following fields:

- Name: (empty)
- Email Address: email@yourcompany.com
- Phone, Mobile, Fax: (empty)

The modal also includes a note: "You are creating a new user. After saving, the user will receive an invite email containing a link to set its password." It features "SAVE" and "DISCARD" buttons at the bottom.

# odoo CRM – Leads Management

Configuration ➤ Leads



Sales      Dashboard      Sales      Invoicing      test kkk      Leads Management      Reports      Configuration

CRM

Leads Email Alias      [Setup your domain alias](#)

Leads

Each mail sent to the alias creates a new opportunity

Use leads if you need a qualification step before creating an opportunity or a customer

Voip integration      [More Info](#)

APPLY      CANCEL

Sales      Dashboard      Sales      Invoicing      test kkk      Leads Management      Reports      Configuration

Leads / New

SAVE      DISCARD

CONVERT TO OPPORTUNITY

Lead

Describe the lead...

|              |               |              |                  |
|--------------|---------------|--------------|------------------|
| Company Name | Street...     | Contact Name | Title            |
| Address      | Street 2...   | Email        | Page views       |
| City         | State         | Job Position | Convert To Issue |
| Country      | ZIP           | Phone        |                  |
| Salesperson  | Administrator | Rating       | ★ ★ ★            |
| Sales Team   | Direct Sales  | Score        | 0.00             |
|              |               | Tags         |                  |

INTERNAL NOTES    EXTRA INFO    ASSIGNED PARTNER

# odoo CRM – Leads Management

Information that you can manage in a lead

The screenshot shows the Odoo CRM Leads Management interface. At the top, there's a navigation bar with tabs: Sales, Dashboard, Sales, Invoicing, Reports, Configuration, and a user dropdown. Below the navigation is a breadcrumb trail: Leads / Information about new products / Information about new products. A toolbar with buttons for EDIT, CREATE, NEW QUOTATION, MARK WON, MARK LOST, and LOG ACTIVITY is visible. On the right, a progress bar shows 1/1 with status indicators: NEW, QUALIFIED, PROPOSITION, and WON. The main content area displays a lead record titled "Information about new products". It includes a summary section with "0.00\$ at 10 %", customer information (Customer: Arts Baptista, Emy Arumugan, Email, Phone), salesperson information (Salesperson: Paul Tremblay, Sales Team: Direct Sales), and activity sections for "Meeting" and "Quote(s)". A rating section shows three stars. At the bottom, there are tabs for INTERNAL NOTES and CONTACT INFORMATION. Several specific fields and sections are highlighted with red boxes: the toolbar buttons, the progress bar, the summary section, the customer and salesperson details, the activity counts, the rating, and the internal notes tab.

# odoo CRM – Leads Management

Drag & drop opportunities between stages in the pipeline

The screenshot shows the Odoo CRM interface for Leads Management. The top navigation bar includes Sales, Dashboard, Sales, Invoicing, After-Sale, Leads Management, Reports, Configuration, and Administrator. The main area is titled "Your Pipeline" and features a grid of opportunities categorized into five stages: New, Qualification, Proposition, Negotiation, and Won. Each stage has a plus sign icon to add new opportunities.

**New Stage:**

- Interest in your Graphic Design Project: 24,000.00€ - Agrolait (Email, 02/14/2016)
- Plan to buy 60 keyboards and mouses: 40,000.00€ (Task, 02/14/2016)
- Need 20 Days of Consultancy: 60,000.00€ (Email, 02/13/2016)

**Qualification Stage:**

- Pricing Information of Services: 1,000.00€ (Email, 02/10/2016)
- Trainee's training plan in your Organization: 35,000.00€ - Delta PC (Call, 02/12/2016)
- Need script to Import external data: 5,600.00€ - Camptocamp (Email)

**Proposition Stage:**

- "Resource Planning" project development: 9,000.00€ - Delta PC (Task)
- Interest in your customizable PCs: 15,000.00€ - Camptocamp (Call, 02/09/2016)
- Would appreciate more information about your products: 11,000.00€ - Agrolait (Email, 02/11/2016)

**Negotiation Stage:**

- Need a new design for my website: 3,800.00€ - Delta PC (Task, 02/13/2016)
- Need to customize the solution: 4,500.00€ (Call, 02/11/2016)
- Plan to buy RedHat servers: 25,000.00€ - Agrolait (Call, 02/12/2016)

**Won Stage:**

- Interest in your Partnership Contract: 19,800.00€ - China Export Call
- Interest in your products: 2,000.00€ (Email, 02/11/2016)
- Want to subscribe to your online solution: 2,000.00€ - Think Big Systems (Email)

# Exercise – Customer Acquisition

## Generate leads from incoming emails

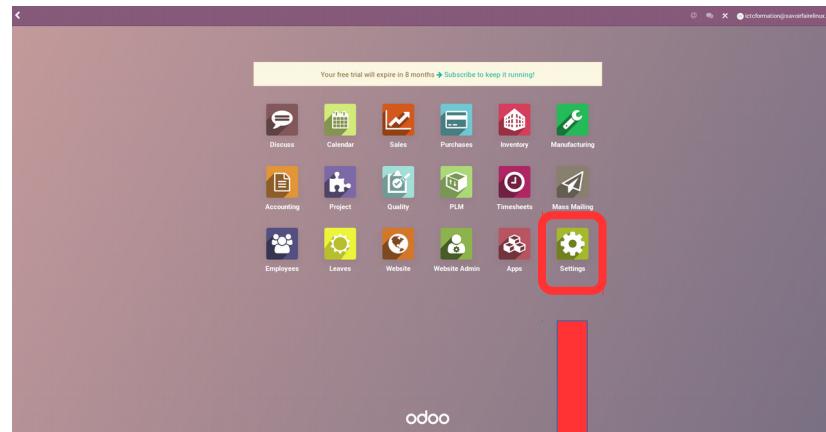
Canadian Colors would like to route, sort and filter incoming email to generate leads from them or route them to the sales team automatically.

### ***TO DO:***

- *Setup your domain alias in settings*
- *Personalize and setup team alias on Dashboard*

# odoo CRM – Setup the company domain

Odoo General Settings



Settings    Dashboard    Users    General Settings    Translations

APPLY    CANCEL

### General Settings

You will find more options in your company details: address for the header and footer, overdue payments texts, etc. [Configure your company data](#)

Email

Configure outgoing email servers – ⚠4 failed emails

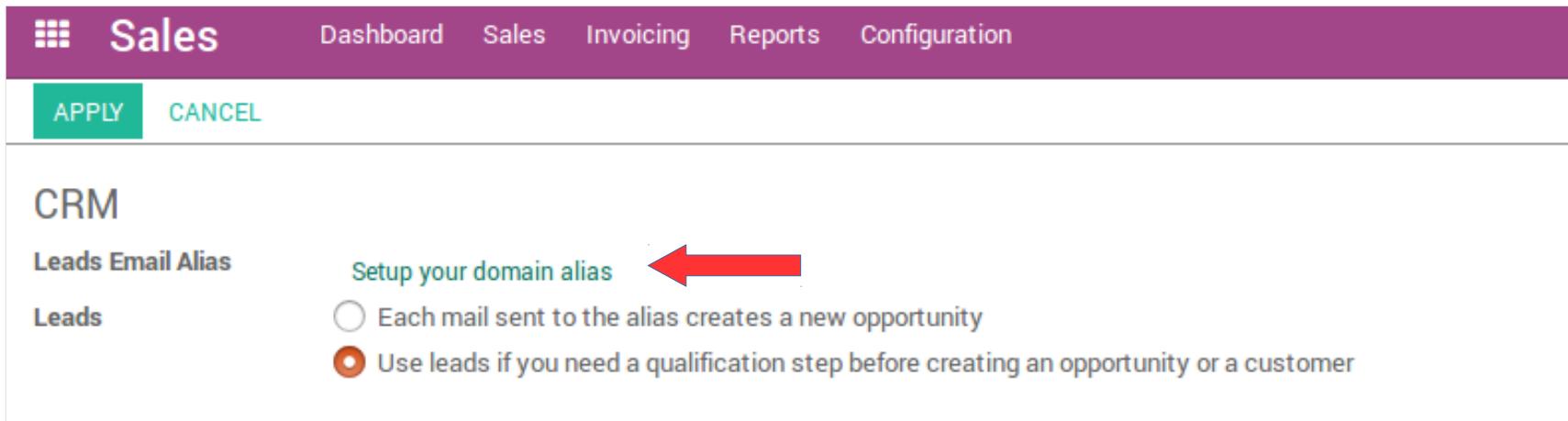
Configure the incoming email gateway

Alias Domain

# odoo CRM – Setup domain alias

## Menu configuration

→ Settings  CRM  Leads Email Alias  Setup your domain alias



The screenshot shows the Odoo CRM interface with a purple header bar. The header contains the Sales menu item, along with links for Dashboard, Sales, Invoicing, Reports, and Configuration. Below the header, there are two buttons: 'APPLY' and 'CANCEL'. The main content area is titled 'CRM' and contains a section for 'Leads Email Alias'. It includes a link labeled 'Setup your domain alias' with a red arrow pointing to it, and two radio button options: 'Each mail sent to the alias creates a new opportunity' (unchecked) and 'Use leads if you need a qualification step before creating an opportunity or a customer' (checked).

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**Website Visitor**

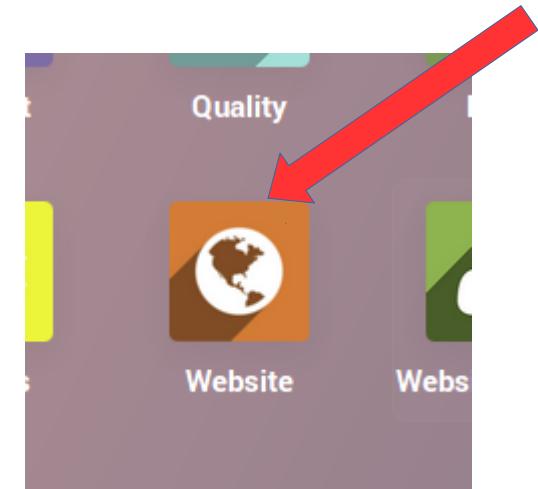
# Exercise – Website visitor

As a common visitor, go on the website and if possible use 2 different email addresses to :

- Fill the contact form : to generate a lead
- Subscribe to the newsletter : for next exercice

## TO DO:

- ***Go on the website as a visitor***
- ***Fill out the contact form***
- ***Find the created lead***
- ***Subscribe to the newsletter***
- ***Find your subscription in Mass mailing***



# odoo Website visitor – Contact form

The screenshot shows the Odoo Website builder interface. At the top, there's a navigation bar with 'Website' (highlighted), 'Content', 'Customize', 'Promote', and a toolbar with 'New' and 'Edit' buttons. On the left, a sidebar has icons for 'odoo', 'HOME' (highlighted), 'SHOP', 'CONTACT US', and an email placeholder 'ICTFORMATION@SAVOIRFAI...'. The main content area displays a product page for 'Organik Link Paint'. The product title is 'Organik Link Paint' and the subtitle is 'New Product 100% Natural and Chemical Free.'. Below the title is a description: 'A water-based acrylic paint for exteriors of high technology that protects the exterior surfaces making them resistant to humidity, eliminating in a 100% step of the water.' A red arrow points from the 'CONTACT US' button on the product page to the 'CONTACT US' button in the Odoo builder interface. Below the product details, there are three features: 'First Feature' (suitcase icon), 'Second Feature' (padlock icon), and 'Third Feature' (heart icon). The bottom section contains 'Our Products & Services' (with a 'Home' link), 'Connect with us' (with a 'Contact us' link and email 'ictformation@savoirfairelinux.com'), and a 'Canadian Colors Inc - About us' section (with an email input field, 'SUBSCRIBE' button, and descriptive text about the company's mission and products).

Website Content Customize Promote + New Edit

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HOME SHOP CONTACT US ITCFORMATION@SAVOIRFAI...

**Organik Link Paint**

New Product 100% Natural and Chemical Free.

A water-based acrylic paint for exteriors of high technology that protects the exterior surfaces making them resistant to humidity, eliminating in a 100% step of the water.

ABOUT US CONTACT US

First Feature

Tell what's the value for the customer for this feature.

Second Feature

Write what the customer would like to know, not what you want to show.

Third Feature

A small explanation of this great feature, in clear words.

Our Products & Services

Contact us

ictformation@savoirfairelinux.com

Canadian Colors Inc - About us

ictformation@savoirfairelinux.com 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.

English + Add a language...

# odoo Website visitor - Contact Form

The screenshot shows the Odoo website builder interface with a contact form template. The top navigation bar includes 'Website', 'Content', 'Customize', 'Promote', and buttons for 'New' and 'Edit'. The left sidebar has links for 'odoo', 'HOME', 'SHOP', 'CONTACT US', and an email placeholder 'ICTCFORMATION@SAVOIRFAI...'. The main content area features a large 'Contact us' heading and a message: 'Contact us about anything related to our company or services. We'll do our best to get back to you as soon as possible.' Below this are several input fields: 'Your Name \*' (Carol Guerrero), 'Phone Number' (empty), 'Email \*' (cguerrerob@yahoo.com), 'Your Company \*' (Lazuli Kanata), 'Subject \*' (Information about new product), and 'Your Question \*' (I want more detailed information about the new product. Thanks.). A green 'SEND' button is at the bottom. To the right, there's a sidebar with 'Canadian Colors Inc' info (Canada, email: ictformation@savoirfairelinux.com, Google Maps link), and at the bottom, sections for 'Our Products & Services' (Home), 'Connect with us' (Contact us, email: ictformation@savoirfairelinux.com), and 'Canadian Colors Inc - About us' (email: ictformation@savoirfairelinux.com, SUBSCRIBE button, About us text: '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.', and a language selection bar: English, Add a language...).

Website Content Customize Promote + New Edit

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HOME SHOP CONTACT US ITCFORMATION@SAVOIRFAI...

## 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 \* Carol Guerrero

Phone Number

Email \* cguerrerob@yahoo.com

Your Company \* Lazuli Kanata

Subject \* Information about new product

Your Question \* I want more detailed information about the new product.  
Thanks.

SEND

Canadian Colors Inc  
Canada  
ictformation@savoirfairelinux.com  
[Google Maps](#)

Our Products & Services

Home

Connect with us

Contact us

ictformation@savoirfairelinux.com

Canadian Colors Inc - About us

ictformation@savoirfairelinux.com 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.

English [Add a language...](#)

Copyright © Canadian Colors Inc

# odoo Website visitor - Leads from website

The screenshot illustrates the Odoo Sales module interface, specifically focusing on leads generated from the website.

**Top Navigation:** The top bar includes links for Sales, Dashboard, Sales, Invoicing, Reports, and Configuration. A user icon and email address (ictformation@savoirfairelinux.com) are also present.

**Leads List View:** The main area shows a list of leads. A red box highlights the second lead, which has a red arrow pointing down to its detail view. The lead details are as follows:

| Create Date         | Lead                                    | Contact Name             | City | Country | Email                | Phone | Sales Team     |
|---------------------|---|--------------------------|------|---------|----------------------|-------|----------------|
| 12/19/2016 15:01:34 | Information about new services          | Charlie Acedo            |      |         |                      |       | Direct Sales   |
| 12/29/2016 16:43:10 | Information about new product           | Carol Guerrero           |      |         | cguerrerob@yahoo.com |       | Direct Sales   |
| 12/20/2016 15:22:50 | Request for information about products  | Marie Madelaine Alsadoon |      |         |                      |       | Direct Sales   |
| 12/20/2016 15:11:52 | Information abour products and services | April Zane               |      |         |                      |       | Indirect sales |
| 12/20/2016 14:57:51 | Request for the new catalog of products | Robert Morrison          |      |         |                      |       | Direct Sales   |
| 12/20/2016 14:54:19 | Need information about products         | Guy Concord              |      |         |                      |       | Direct Sales   |

**Lead Detail View:** The bottom section shows the detailed view of the lead "Information about new product". A red box highlights the "CONVERT TO OPPORTUNITY" button. The lead details are:

Information about new product

|              |                                   |              |                      |
|--------------|-----------------------------------|--------------|----------------------|
| Company Name | Lazuli Kanata                     | Contact Name | Carol Guerrero       |
| Address      |                                   | Email        | cguerrerob@yahoo.com |
| Salesperson  | ictformation@savoirfairelinux.com | Job Position |                      |
| Sales Team   | Direct Sales                      | Phone        |                      |
|              |                                   | Mobile       |                      |
|              |                                   | Fax          |                      |
|              |                                   | Rating       | ☆☆☆                  |
|              |                                   | Tags         |                      |

**Internal Notes:** I want to know more about this new product.  
Thanks.

# odoo Website visitor - Newsletter subscription

The screenshot shows the Odoo Website builder interface with a dark-themed sidebar on the left and a light-themed main content area.

**Website Sidebar:**

- Content
- Customize
- Promote

**Main Content Area:**

## Organik Link Paint

New Product 100% Natural and Chemical Free.

A water-based acrylic paint for exteriors of high technology that protects the exterior surfaces making them resistant to humidity, eliminating in a 100% step of the water.

[ABOUT US](#) [CONTACT US](#)

**First Feature:** Tell what's the value for the customer for this feature.

**Second Feature:** Write what the customer would like to know, not what you want to show.

**Third Feature:** A small explanation of this great feature, in clear words.

**Our Products & Services:** Home

**Connect with us:**

- Contact us
- ictformation@savoirfairelinux.com

**Canadian Colors Inc - About us:**

ictformation@savoirfairelinux.com [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.

English [+ Add a language...](#)

# odoo Website visitor - Newsletter subscription

Mass Mailing ➤ Mailings ➤ Mailing Lists : Select the Newsletter list

Mass Mailing

Mailings Campaigns Reports Configuration

Mass Mailings

CREATE

Draft + In Queue

TEST MASS MAILING - 20170220-01

New massmailing

Mass Mailing

Mailings Campaigns Reports Configuration

Mailing Lists

CREATE IMPORT

|                                     | Mailing List | Creation Date       |
|-------------------------------------|--------------|---------------------|
| <input type="checkbox"/>            | Mailing List | 02/15/2017 17:35:12 |
| <input type="checkbox"/>            | List test 1  | 12/19/2016 15:33:20 |
| <input checked="" type="checkbox"/> | Newsletter   | 02/14/2017 15:57:26 |
| <input type="checkbox"/>            | TEST         | 02/15/2017 17:37:29 |
| <input type="checkbox"/>            | test list 1  |                     |

Open Recipients to verify your subscription has been added to the list.

Mass Mailing

Mailings Campaigns Reports Configuration

Mailing Lists / Newsletter

EDIT CREATE

Attachment(s) ▾ Action ▾

Newsletter

Active 4 Recipients

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**Mass - mailing**

# CMR – Mass Mailing

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Build Campaigns & create own personalized emails



Track & Improve campaigns (real-time statistics on every email sent out)



Mailing List Management (segment database)



Content Full Responsive on every screen (tablet, mobile phone, laptop or desktop computer)



Track the clicks, opportunities, and revenue generated by campaigns

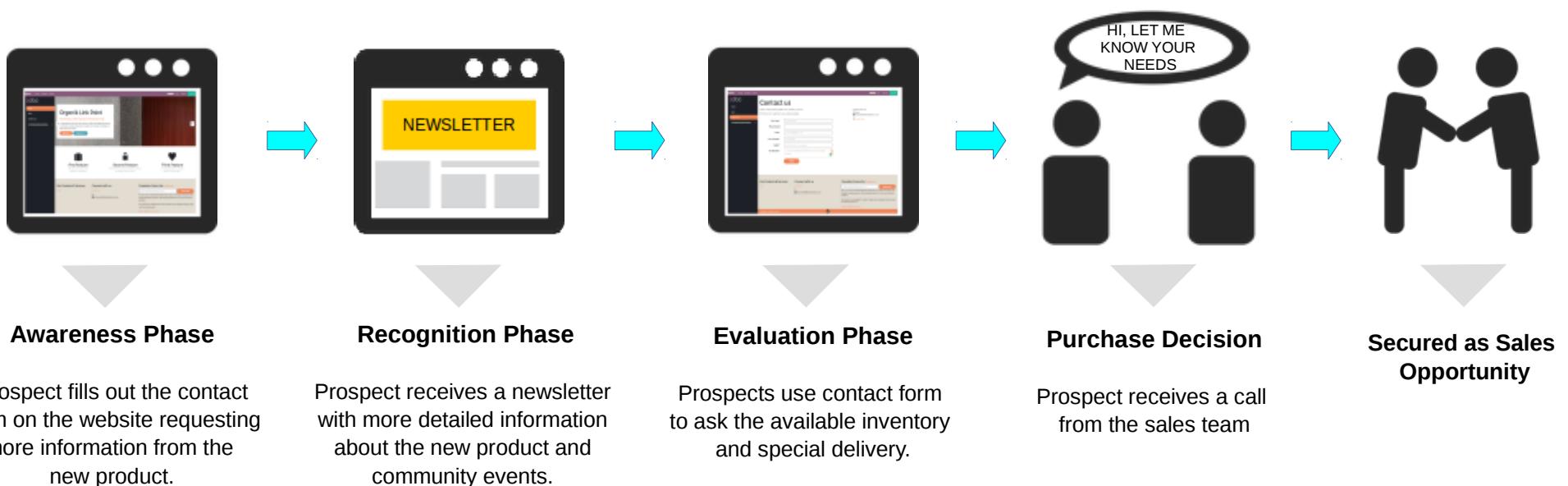


Calculate ROI (analyze the conversion rate, the expected revenue and the generated revenue of each campaign)

# CMR – Mass Mailing

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## Phases of the marketing campaign



# **Exercise – Customer Acquisition**

## **Create and send a newsletter**

Canadian Colors has designed a marketing campaign to inform customers and prospects about its new product « Organic Link Paint » a water-based acrylic paint for exteriors of high technology that protects the exterior surfaces making them resistant to humidity, eliminating in a 100% step of the water.

The marketing team wants that you design the next version of newsletter including information about this new product. Likewise, once the piece is designed, send to new prospects.

# Exercise – Customer Acquisition

***You have previously subscribed to the Newsletter.***

## ***TO DO***

- Design the newsletter including information about this new product.
- Send the newsletter to the dedicated mailing list. Be aware of including the new subscription created through the website.
- Select the recipients of your choice to optimize the results. By default all clients are within the mailing list « Newsletter » but we can select the recipients at the time of the creation of the campaign.

# odoo CRM – Mass Mailing

Mass Mailing Mailings Campaigns Reports Configuration @ 24 Administrator

Mass Mailings / New

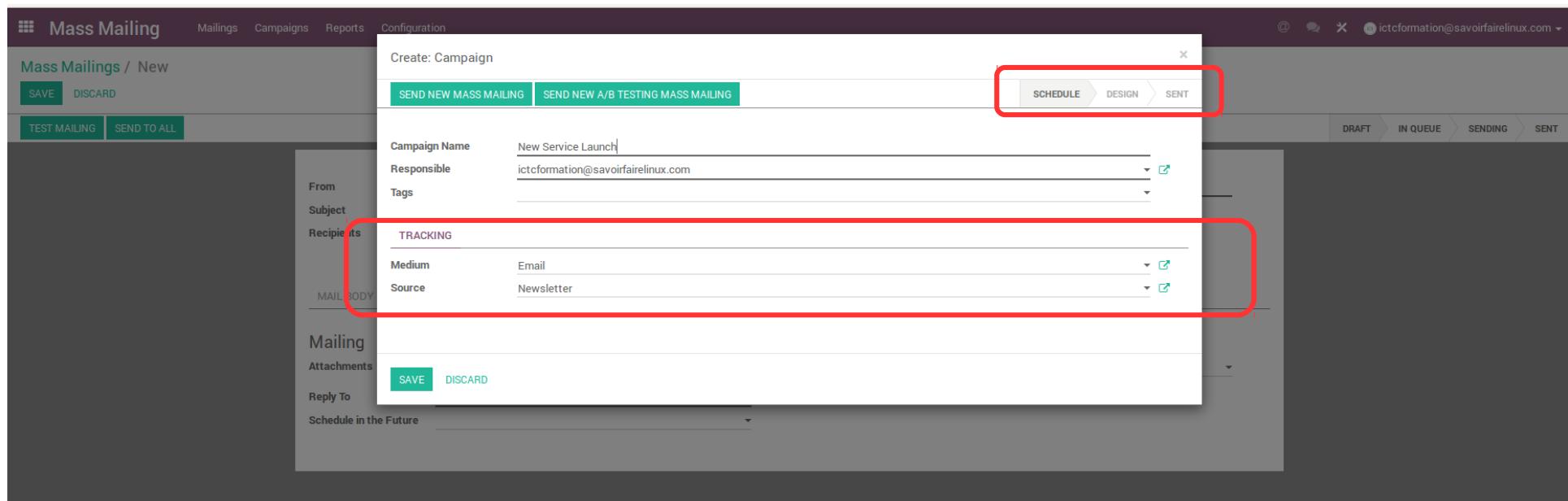
SAVE DISCARD

TEST MAILING SEND TO ALL

DRAFT IN QUEUE SENDING SENT

The screenshot shows the 'Mass Mailings / New' page. At the top, there are 'SAVE' and 'DISCARD' buttons. Below them are 'TEST MAILING' and 'SEND TO ALL' buttons, which are highlighted with a red box. The main area has sections for 'From' (Administrator <admin@yourcompany.example.com>) and 'Subject'. Under 'Recipients', there are radio buttons for 'Applicants', 'Leads / Opportunities', 'Customers', and 'Mailing List', with 'Mailing List' selected and highlighted with a red box. A dropdown menu 'Select mailing lists...' is shown below. The interface includes a toolbar with 'MAIL BODY' and 'OPTIONS' tabs, and a rich text editor with various styling tools. On the left, there's a sidebar with 'Headers' (Left Logo, Left Text, Centered Logo, Banner), 'Body' (Title Content, Title - Subtitle, Paragraph, Comparison), and 'MORE' options. The main preview area shows a logo placeholder, social sharing icons, a 'New Arrivals' section with a 'DISCOVER' button and an image of a tripod, and two smaller images of a guitar and a television screen.

# odoo CRM – Mass Mailing



# odoo CRM – Mass Mailing

Screenshot of the Odoo CRM Mass Mailing interface showing a newsletter preview.

The interface includes the following elements:

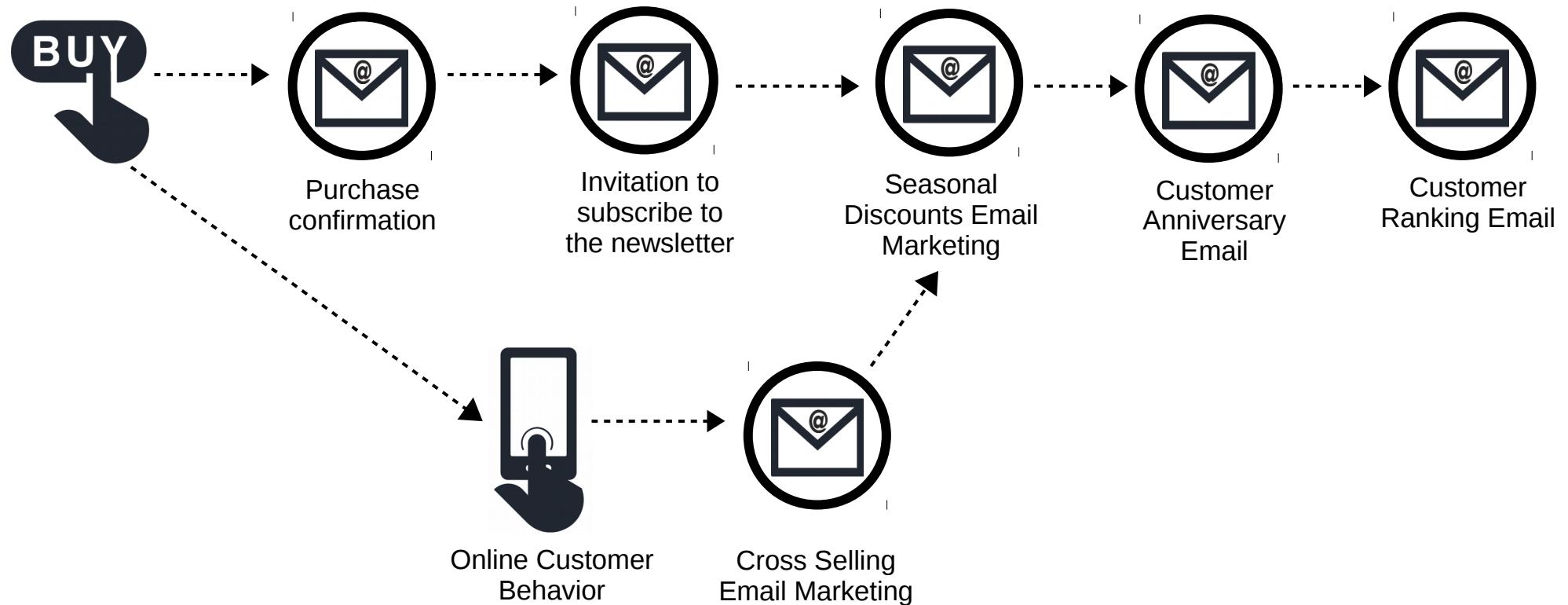
- Header:** Mass Mailing, Mailings, Campaigns, Reports, Configuration, and a user dropdown.
- Action Bar:** EDIT, CREATE, TEST MAILING, CANCEL, and Action dropdown.
- Status Bar:** 1/1, DRAFT, IN QUEUE, SENDING, SENT.
- Preview Header:** Received (0%), Opened (0%), Replied (0%), Clicks (0%), Bounced (0%), Active.
- Preview Content:** From: "ictformation@savoirfairelinux.com" <ictformation@savoirfairelinux.com>, Subject: Newsletter, Recipients: Mailing List.
- Mail Body:** Options tab selected, showing:
  - A logo placeholder: a Your Logo button.
  - A main image: New Arrivals featuring a black guitar.
  - Two smaller items: Gibson Les Paul Junior (electric guitar) and Sony BDVE210 (TV).

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# Customer Retention

# odoo CRM – Customer Retention Example

## Customer retention strategies using Mass Mailing

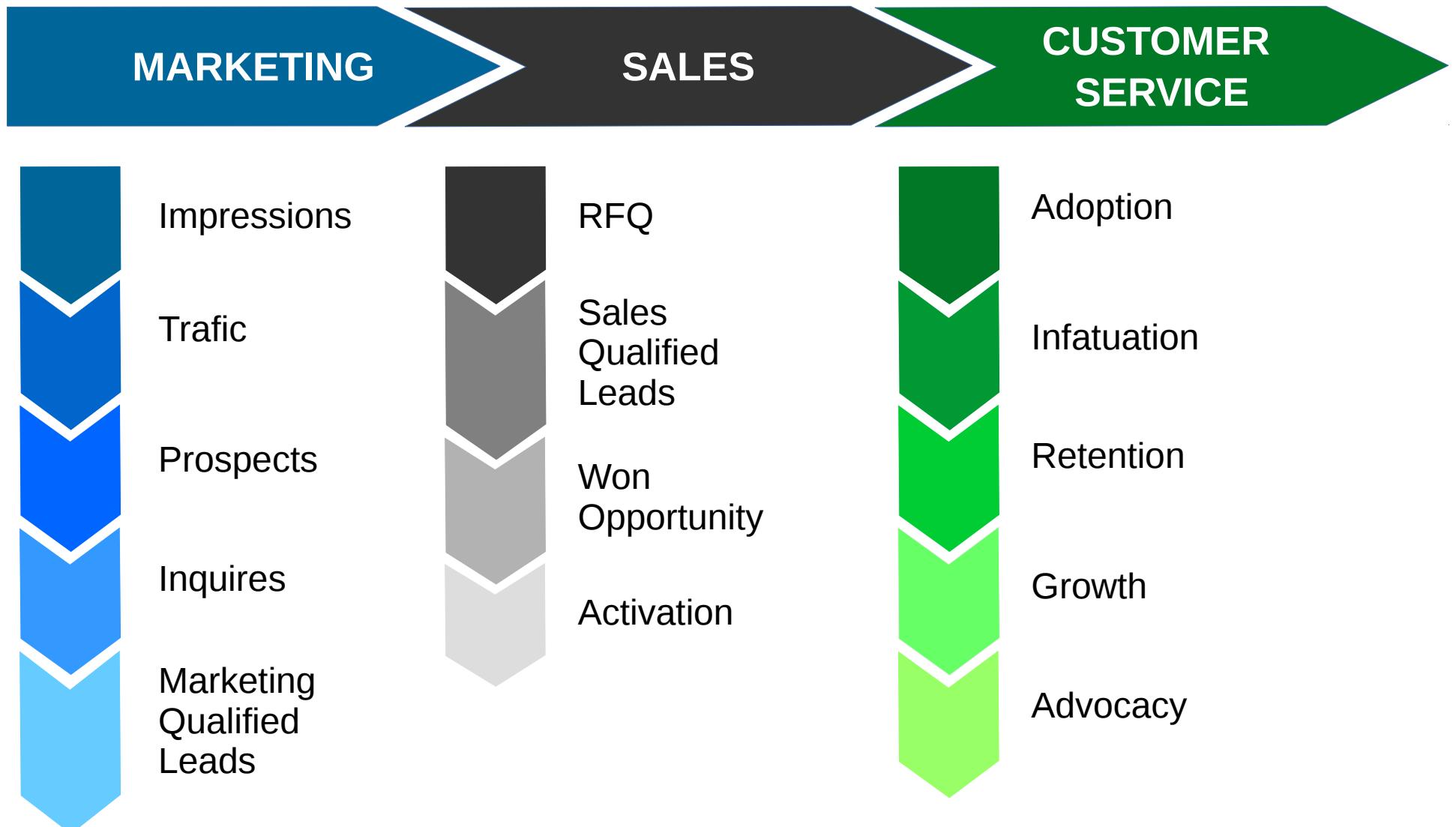


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# Customer Management

# CMR – Client Lifecycle

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# odoo CRM – Customer Management

The screenshot shows the Odoo CRM interface for a customer record. At the top, there's a navigation bar with links for Sales, Dashboard, Sales, Invoicing, Reports, and Configuration. On the right side of the header, there are user icons and the email address ictformation@savoirfairelinux.com.

The main content area displays the customer details for "Canadian Art Inc". At the top of this section, there's a toolbar with various status indicators: Active (1), Opportunities (1), Meetings (0), Activities (0), Unpublished On Website (0.00\$), Invoiced (0.00\$), Sales (0), and More. A red box highlights this toolbar.

Below the toolbar, the company name "Canadian Art Inc" is displayed. To the left, there are fields for Address, Website, and Tags. To the right, there are fields for Phone, Mobile, Fax, Email, and Language (set to English). A red box highlights the "CONTACTS & ADDRESSES" tab in the navigation bar at the bottom of the main content area.

At the bottom left, there's a contact card for "Michelle Leblanc Manager" with a placeholder profile picture.

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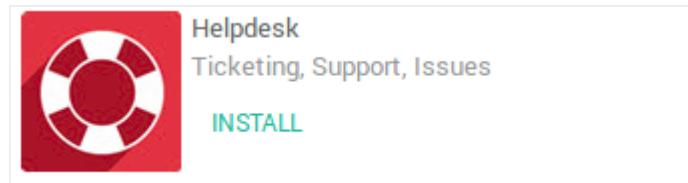
**Customer Service**

# Exercise – Help Desk

Canadian Colors would like to create the scheme of the service and support to customers including the line of care and the system for monitoring complaints and claims.

## TO DO

- › ***Install « Help Desk » Module***



- › ***Register a customer complaint. A customer wants to return a product because it corresponds to another reference.***
- › ***Create work teams as the customer service team and second level technical support team***
- › ***Assign the customer complaint to a responsible person***
- › ***Register the follow-up and closure of the complaint.***

# odoo CRM – Help Desk

Helpdesk    Dashboard    All Tickets    Reports    Configuration    @ 26    X    Administrator ▾

Dashboard    1-3 / 3 < >

| My Tickets     | 13<br>Tickets | 7<br>High Priority (★★) | 4<br>Urgent (★★★) | My Performance | 8<br>Closed Tickets | 8 / 10<br>Customer Rating | 92%<br>Success Rate |
|----------------|---------------|-------------------------|-------------------|----------------|---------------------|---------------------------|---------------------|
| Avg Open Hours | 19            | 87                      | 32                | Today          | 46                  | 7 / 10                    | 100%                |
| SLA Failed     | 2             | 0                       | 1                 | Avg 7 days     | 10                  | 5                         | 75                  |
|                |               |                         |                   | Daily Target   |                     |                           |                     |

**Business** [More ▾](#)

✉ business@mycompany.com

**TICKETS**

5 Tickets to Review  
4 Unassigned Tickets  
See Customer Satisfaction  
See SLAs

**Technical** [More ▾](#)

✉ technical@mycompany.com

**TICKETS**

View Tickets  
Archived  
SLA Failed  
Not Satisfied

**Reports**

Opened Tickets Analysis  
Performance Analysis

**Usability** [More ▾](#)

✉ usability@mycompnay.com

**TICKETS**

0 Tickets to Review  
4 Unassigned Tickets  
See Customer Satisfaction  
See SLAs

**Settings**



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