

Odoo CRM Complete Documentation

1. Difference Between Lead and Opportunity

Lead:

- A Lead is an unqualified contact or potential customer who has shown interest in a product or service. Leads may come from website forms, emails, events, or marketing campaigns. At this stage, customer requirements, budget, and decision timeline are not fully confirmed.

Opportunity:

- An Opportunity is a qualified lead with confirmed interest, requirement, and potential to convert into a sale. After discussion and validation, a lead is converted into an opportunity and tracked in the sales pipeline.

Key Differences:

- Lead is unqualified; Opportunity is qualified.
- Lead is early stage; Opportunity is advanced stage.
- Lead needs verification; Opportunity is ready for quotation

2. Process of Creating and Sending a Quotation

1. Step 1: Enable Leads from CRM → Configuration → Settings → Enable Leads → Save.
Now system will separate:

- Leads
- Opportunities

2. Step 2: Create Lead from CRM → Leads → Create → Enter customer details → Save.

Lead Title

- Customer Name
- Email
- Phone
- Salesperson
- Sales Team

Status = *New Lead*

Step 3: Qualify the Lead

Open the Lead and:

- Add notes
- Schedule activity (Call/Meeting)
- Check customer requirement
- Confirm budget & timeline

3. Step 3: Convert Lead to Opportunity by clicking 'Convert to Opportunity'.
Click Convert to Opportunity.

Options : convert directly

Convert & Merge (if duplicate)

Assign to salesperson

Click Convert

Now it moves to:

CRM → Pipeline (as Opportunity)

2) Detailed Process of Creating & Sending Quotation

step 1 : Open Opportunity

CRM → Pipeline → Open any Opportunity

step 2: Create Quotation

Click New Quotation

System automatically opens Sales Order form.

Step 3: Fill Sales Order Details

Complete:

Customer Details

- Invoice Address
- Delivery Address
- **Customer Name**

Order Lines

Click Add Product

- Select product
- Enter quantity
- Check unit price
- Taxes applied automatically

Other Information Tab

- Salesperson
- Sales Team
- Payment Terms
- Delivery Policy

Click Save

Step 4: Send Quotation

Click Send by Email

- Email template opens
- PDF attached automatically
- Click **Send**

Status becomes: **Quotation Sent**

Step 5: Confirm Quotation

Once customer agrees:

Click Confirm

Status changes to:

- Sales Order
- Delivery Order created
- Invoice can be generated

3) Rule-Based Lead Assignment – Deep Configuration Steps

Automatic assignment distributes leads based on defined conditions.

Step 1: Activate Developer Mode

Settings → Activate Developer Mode

(This shows advanced CRM configuration.)

Step 2: Enable Lead Assignment

CRM → Configuration → Settings

Enable:

- Lead Scoring
- Rule-Based Assignment

Click **Save**

Step 3: Create Sales Teams

CRM → Configuration → Sales Teams → Create

Example:

Team 1:

- Name: Software Sales
- Team Leader: John
- Members: John

Team 2:

- Name: Hardware Sales
- Team Leader: Mary
- Members: Mary

Click **Save**

◆ **Step 4: Create Assignment Rule**

CRM → Configuration → Lead Assignment → Create

Fill:

Rule Name:

Software Assignment

Apply On:

Leads

Domain Condition:

Click **Edit Domain**

Example Condition:

- Field: Description
- Operator: contains
- Value: Software

Assign To:

- Sales Team: Software Sales
- Salesperson: John

Click **Save**

Step 5: Test the Rule

Create new Lead:

Description: “Need Accounting Software”

Click Save

System automatically assigns:

Salesperson → John

Sales Team → Software Sales

Real Scenario Example

Company sells:

- ERP Software
- CCTV Hardware

Rules:

Keywor d	Assign To
ERP	ERP Team
CCTV	Hardware Team

If lead form contains “CCTV installation required” → Automatically assigned to Hardware Team.

4) Multiple Sales Teams – Detailed Setup

Step 1: Create Teams

CRM → Configuration → Sales Teams → Create

Enter:

- Team Name
- Team Leader
- Members
- Email Alias (optional)
- Company

Click Save

Step 2: Assign Targets

Sales → Reporting → Sales Teams

Set:

- Monthly Target
- Quarterly Target

Step 3: Assign Leads by Team

While creating lead:

- Select Sales Team manually
OR
- Use Assignment Rule

Benefits in System

Each team gets:

- Separate Pipeline
- Separate Reports
- Separate Forecast
- Performance Tracking

5) CRM Reports – Detailed Navigation & Usage

CRM → Reporting

You can switch between:

- Graph View
- Pivot View
- List View
- Cohort View

◆ 1. Pipeline Analysis

CRM → Reporting → Pipeline

Shows:

- Opportunities by Stage

- Expected Revenue
- Probability %
- Salesperson performance

Filters:

- By Salesperson
- By Sales Team
- By Date
- By Company

2. Leads Analysis

CRM – Reporting – Leads

Shows:

- Total Leads
- Converted Leads
- Conversion Rate
- Lead Source

3. Activities Report

CRM – Reporting – Activities

Tracks:

- Calls
- Meetings
- Emails
- Overdue activities

4. Forecast Report

CRM – Reporting – Forecast

Shows:

- Expected Revenue
- Weighted Revenue
- Monthly Prediction

5. Win/Loss Analysis

CRM – Reporting – Opportunities

Group By:

- Stage
- Lost Reason

Helps to identify:

- Why deals fail
- Performance improvement areas

4. Step 5: Sales Order form opens – Add Customer, Products, Quantity, Price, Taxes.
5. Step 6: Click 'Save'.
6. Step 7: Click 'Send by Email' – Quotation PDF is sent to customer.
7. Step 8: Click 'Confirm' after approval – Converts into Sales Order.

3. Rule-Based Lead Assignment in Odoo CRM

Rule-based lead assignment automatically assigns leads to salespersons or teams based on defined conditions.

8. Activate Developer Mode from Settings.
9. Go to CRM – Configuration – Settings – Enable Lead Assignment – Save.
10. Create Sales Teams from CRM – Configuration – Sales Teams – Create.
11. Go to CRM – Configuration – Lead Assignment – Create Rule.
12. Set Rule Name, Apply On (Leads), and Domain Condition (e.g., Description contains 'Software').
13. Assign Salesperson and Sales Team.
14. Save and test by creating a new Lead.

Example Scenario:

If a lead contains the word 'Software', it is assigned to the Software Sales Team. If it contains 'Hardware', it is assigned to the Hardware Sales Team.

4. Purpose of Multiple Sales Teams in CRM

- Organize sales department by product, region, or sales channel.
- Track team-wise performance and targets.
- Better reporting and forecasting.
- Clear responsibility and accountability.
- Improved lead distribution.

5. Types of CRM Reports in Odoo

- Pipeline Analysis Report – Shows opportunities by stage, expected revenue, and probability.
- Leads Analysis Report – Displays number of leads and conversion rate.
- Activities Report – Tracks calls, meetings, and follow-ups.
- Forecast Report – Shows expected revenue prediction.
- Win/Loss Analysis – Identifies reasons for lost opportunities.
- Salesperson Performance Report – Measures revenue and success rate.