CRM Practice & Self-Learning Tasks

Part 1: CRM Practice Tasks

1. Create Leads and Assign Them to a Salesperson and Sales Team:

- Go to CRM module.
- Navigate to Leads → Click Create.
- Enter Lead details (Customer Name, Email, Phone, Description).
- Select appropriate Salesperson.
- Select Sales Team.
- Save the Lead.

2. Create and Send a Quotation:

- Convert the Lead to an Opportunity.
- Open the Opportunity from Pipeline.
- Click on 'New Quotation'.
- Add Customer details and Products.
- Set Quantity, Price, Taxes, and Payment Terms.
- Save the Quotation.
- Click 'Send by Email' to send the quotation to the customer.
- Confirm the quotation after customer approval.

3. Practice Assignment Rules and Multi-Teams Feature:

- Activate Developer Mode.
- Go to CRM → Configuration → Settings → Enable Lead Assignment.
- Create multiple Sales Teams (e.g., Software Team, Hardware Team).
- Go to CRM → Configuration → Lead Assignment → Create rules.
- Define domain conditions (e.g., Description contains 'Software').

- Assign Salesperson and Sales Team in the rule.
- Create test leads to verify automatic assignment.

Part 2: Self-Learning Tasks

Review and understand different types of CRM Reports available in Odoo:

- Pipeline Analysis Report
- Leads Analysis Report
- Activities Report
- Forecast Report
- Win/Loss Analysis Report
- Salesperson Performance Report

Explore the following in Reports section:

- Use Graph View, Pivot View, and List View.
- Apply Filters and Group By options.
- Analyze conversion rates and revenue forecasts.
- Understand stage-wise opportunity tracking.