



Odoo For Sales Company

The Company

A Europe based company is having a lead based sales and service working environment.

The Challenge

Their important requirement was to manage sales leads, manage territory wise contact and sales from sales team and as per sales team structure, manage product offerings to customers and commission to sales people.

Client already had Sugar CRM in place but was not suffice to match their exact needs of completely lead to opportunity to sales to invoice cycle.

The Major requirements were as followed:

- Lead Management base on territory
- Sales team Management
- Product Offering Management
- Commission Management
- Advance Sales Reports
- Data migration from Sugar CRM

The Solution

OpenERP/Odoo implementation using core addons and some custom developed module a solution was created providing following functionalities.

- OpenERP/Odoo CRM module customization as per the need of information storage
- LDAP based access to be in sync. with other system
- A completely new module of OpenERP/Odoo to manage commission payment and receivables
- Territory based access rules in system for complete data abstraction between various sales team and departments
- Sales performance reports to trace sales related activities and efficiency of sales people
- TerminatOOR Kettle Connector to migrate data from Sugar CRM to OpenERP/Odoo

The Result

After implementation of OpenERP/Odoo and desired functionality, Client is now able to manage leads and sales in more efficient manner than Sugar CRM. A complete sales cycle overview now helps in taking various business decisions and making necessary changes in product offerings. Sales activities are now logged more efficiently helping in turning more leads into sales. Better and flexible commission management turn out to be a major factor for their financial needs.