

EVERYTHING YOU NEED TO KNOW ABOUT ODOO

E-Book

Expert Opinions

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Introduction

You are probably about to get a new ERP solution so... congratulations! If you've downloaded this E-Book, Odoo has undoubtedly caught your eye (or you're just curious, not that there's anything wrong with that!)

To help you in your decision-making process, we have spent hours slaving over content with our best ERP experts to help shed some light on the matter for you. Once you've finished reading, you should have an accurate overview of the options available in the Odoo ERP. You will then be in a position to make an informed decision about your future business management application (or you will have satisfied your voracious curiosity, which is always a good thing!)

Over the course of these pages, you'll learn (among other things) that Odoo is not a free-of-charge ERP solution (we might as well get that out of the way now), that the connectors between Odoo and the various banking systems for e-commerce are very powerful, that choosing an integrator is a strategic decision, and much more.

So, enjoy reading!



5 FALSE IDEAS ABOUT ODOO ERP

Odoo is an open-source ERP that is designed to provide a **complete, professional and easy-to-use solution to businesses of all sizes and across all sectors**. It allows all key business functions to be covered using its various modules. Nevertheless, there are many misinformed ideas that people believe. Here is a brief insight into five of them.

1 ODOO IS STRICTLY FOR SMES



Since the beginning, Odoo's approach has always been to give all businesses the opportunity to have an ERP system, every size, from SMEs to major corporations. For a long time, ERP was reserved: for larger companies, the smallest organizations couldn't risk launching that kind of project, and Odoo therefore presented itself as an ideal **compromise, thanks to how easy it is to implement**. However, the misconceived notion that «ERPs are only for "SMEs"» has stuck. That's unfair, the Odoo ERP now includes major corporations, such as Toyota and Sodexo among its long list of clients. Toyota uses Odoo to manage stocks and invoicing for its «Material Handling» branch in France. Likewise, Sodexo used it to implement a centralized management system for its vending machine division.

2 ODOO IS FREE OF CHARGE



Odoo is an open-source ERP, therefore it must be free of charge. Well this not the case, not at all! Similar to traditional software publishers, Odoo is a professional solution that charges for its products. Odoo Enterprise makes use of proprietary developments: from accounting to sales, to project management and human resources. Their enterprise version offers **more comprehensive functional modules** than the shared community version to fit the needs of all businesses. This should put an end to the low cost, low quality image that the Odoo ERP system has attracted over the past few years. Instead, Odoo should be seen as a complete, modular system that adapts to any organization with rapid growth rates thanks to a highly active community.

3

ODOO DOESN'T OFFER HIGH-QUALITY SUPPORT



Many businesses think that open-source software means a low level of user support. That's not true! There is indeed a publisher that provides **first-line support** (in the form of tickets). That publisher is Odoo. After that, your integrator becomes a true partner. If you experience difficulties setting up Odoo, you can turn to this integrator to find, support and guidance. Moreover, the highly involved Odoo community often provides **solutions and updates** that help enhance the ERP software. Finally, in the case of developing specific modules, you will also have the support of the company that implemented these features.

4

ODOO IS NOT UP TO THE JOB



When compared to ERPs like SAP and Microsoft Dynamics Navision, people often think that there is no room for Odoo in the ERP ecosystem. This is wrong and there is enough evidence to demonstrate Odoo's growing position. Odoo now has over **5 million users worldwide**, with an average growth rate of **69%** over the last ten years.

Odoo also has **1449 partners in 130 countries and 10,000 reference** clients from SMEs to major corporations including WWF, Jamba Juice, Hyundai and Danone.

5

ODOO AN INFLEXIBLE "OUT-THE-BOX" SOLUTION




Many people think that what Odoo has to offer is highly packaged and not very flexible. However, Odoo now supports **over 10,000 independently available applications**. A few years ago, Odoo didn't offer any standard packages and the could not be installed without the support of an integrator. Today, things are different. The open-source ERP software now offers an increasing number of packaged offerings that include strategically grouped applications. This has crated this illusion that Odoo is a solution that only works exactly as is, an "out of the box." However, in fact, these offers enable enterprises to benefit from a **turnkey solution** that retains all of Odoo's unique flexibility and custom developments. In short, you can install modules and features of your choice whenever you want!

More Questions
About Odoo?
Contact Our
Odoo ERP Consultants

[GET ANSWERS TODAY](#)





STANDARDIZING YOUR IT SYSTEMS USING ODOO

In an era where **data governance policies** are everywhere, IT departments are on the front line. They are responsible for ensuring data quality within enterprises: managing infrastructure, raising awareness in the business, reporting to management. They have a wide variety of tasks, and their responsibilities will grow even further with the arrival of GDPR (see our articles on the topic).

How can you effectively manage a **data management policy** while dealing with schedules that are often overloaded? One part of the solution can be found in **standardizing your IT systems**. How? By **integrating an agile, modern ERP solution** like Odoo.

Step 1

START WITH THE BASICS



An ERP project is a major event for any business. Even with how simple Odoo can be, it **fundamentally changes an organizations existing processes** as well as employee working habits. An ERP project, therefore, is not a project to take be taken lightly. The problem is that there is often times **a lot of "hype" surrounding the implementation of new management applications:** business leaders want to do everything at once.

Big mistake! On the other hand, major company changes can provoke negative reactions among some employees, poor take-up rates would be completely **counter-productive to the desired goals of your IS standardization.** When it comes to ERP implementation a gradual approach is the key to success.

For your first ERP project, we recommend that you **only deploy Odoo modules that are essential to the customer lifecycle:** CRM, sales administration, customer accounting (invoicing and payment), logistics and procurement. This is already a major project that **will lead to significantly smoother operations and substantial productivity gains.** Additionally, this makes it easier for employees to get used to working with the new ERP solution and you will be able to manage the change more effectively. Finally, by getting to grips with the ERP software, you will be able identify any processes that need to be redesigned. The deployment of Odoo, **will provide a solid starting baseline for managing your company's data.**

Step 2

EXTEND THE SCOPE OF YOUR ERP GRADUALLY

Once this first stage has been «accepted» by all stakeholders (lines of business, management, IT, and the integrator, etc.) you can confidently consider the next stage of the deployment. Other departments, such as **HR, marketing, and communications** will then be able to take full advantage of the features that Odoo offers. Modules (or apps as Odoo refers to them) dedicated to **website managment, blogging, recruiting, and human resources**, etc. are genuine **sources of additional productivity** for employees and the IT department alike.

Indeed, these modules allow you to **extend the standardization of your IT** by centralizing the majority of your internal business processes. Data passing through a single software application allows for a better flow of information within your organization.

Thanks to the **drastic reduction in the number of different softwares and tools required** operations become much more efficient. These are **significant benefits for the IT department and the business that cannot be overlooked**



Step 3

ERADICATE SHADOW IT



Even when Odoo becomes the primary working tool for the vast majority of the business's employees, there is bound to be a few applications and Excel files that will survive in the shadows of the various departments. Whether this is due to resistance to change or because a highly specific feature has not been incorporated into Odoo, **there are still reasons to as to why shadow IT persist in an organization.** This phenomenon, defined as the use of applications without the agreement of the IT department, and therefore without connection to the

main IT system - **is currently a problem for many companies** . However, Odoo makes it both simple and very possible to combat shadow IT.

One of the **main characteristics of Odoo** is its open source aspect, which means that, if none of the 10,000 applications meets a specific need **custom developments are possible.** With the support of a good integrator, it is possible to connect virtually any application to **meet 99% of the needs of the business.** Eliminating any reason for employees to bypass the official processes. **With Odoo, shadow IT is a thing of the past!**



ODOO HOSTING: SAAS OR ON-PREMISE?

SaaS (Software as a Service) is everywhere - with software publishers adopting it and the media reporting on it. Countless articles and sales pitches tout its benefits. In reality, it is often difficult to know **what type of hosting is most suitable for your ERP**. When talking about hosting the hottest new gimmicky application demanded from the marketing team, the implications are less serious and a bad decision can be fixed. On the other hand, when it comes to a new Odoo ERP system, it is better to consider the question carefully because setbacks are often costly and complicated.

Here we attempt to answer the question as to **which hosting option is most suitable for your Odoo ERP**



On-Premise HOSTING

To start, you should be aware that there are **three main types of hosting** for Odoo: on-premise, publisher cloud, and integrator cloud. Let's start with on-premise hosting: what are the advantages and disadvantages?

On-premise hosting has a number of benefits for the IT department. This is a mode of ERP hosting that gives the IT department **total control over its IT infrastructure**. All updates, additional modules and custom-made developments are managed in-house by the IT department. If, for example, you have contractual commitments to your customers that require you to store your data on your own servers, this can be valuable. Nevertheless, this option **requires the IT department to take on a substantial workload**. Of course, some of these tasks (such as updates) can be delegated to the integrator, but there are still significant resources (in terms of man-hours) **that need to be accounted for**. In addition, the integrator will not be able to offer the same guarantees as it would if it managed your hosting from end to end. Moreover, if your business is growing quickly, hosting your ERP solution on your premises **will require you to make regular investments in new servers, etc.** And of course, all that comes at a cost!



Odoo Hosting

PUBLISHER'S CLOUD

If you have no particular reason to host Odoo in on-premise mode and you would prefer **to reduce your costs as much as possible**, you can opt for the Odoo cloud. Indeed, choosing an SaaS package that uses the publisher's cloud is the most economical solution, which **is its primary benefit**. But be careful, because this alternative has its limitations.

Odoo will be able to offer very competitive rates for its cloud hosting, but there are **some trade offs**. The most significant relates to **updates to the ERP system**: they will be carried out automatically with no ability to reverse the change. If you have a completely standard Odoo ERP implementation, that's not a problem in this case. Enjoy your updates! But on the other hand, if you have modules that are somewhat specific or if you have made custom developments to tie your ERP system in with your business needs, this can cause issues. Updates can sometimes change the way your custom modules work. Your **options for customizing Odoo will be much more restricted** if you choose this hosting option.




Integrator Hosting

CLOUD

To enjoy the **benefits of SaaS hosting for Odoo** without all the disadvantages we've identified, you can choose your integrator's cloud. This solution is a **much more economical when compared to on-premise hosting** because you will save the time-consuming maintenance and the costs involved with your own IT infrastructure. Everything is managed by your integrator. It also **provides you with additional ease of mind in terms of support**. In the event that you have a problem with your ERP system, your IT department will not be involved directly. Users can contact the support team provided by the integrator.

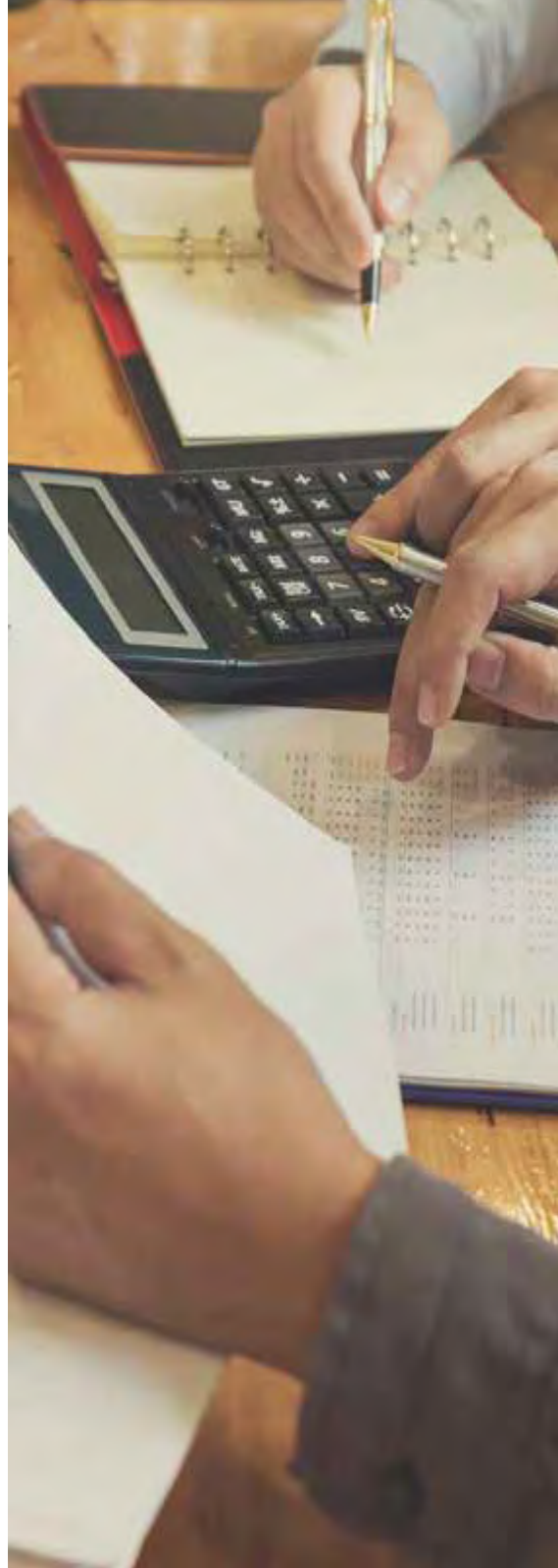
The same applies to Odoo updates: they will only be carried out with your consent and with the assurance that custom developments will not be affected. One way integrators achieve this is through the use of test environments first. **This will give you increased confidence and lower risk!** For example, depending on your contract agreement your data can be backed up at regular intervals onto multiple remote servers, and you will benefit from a guaranteed repair time of less than 24 hours.

[For full details of all the options that are available to host your Odoo ERP deployment in SaaS mode, contact us!](#)



EXPANDING YOUR ERP SYSTEM WITH ODOO CONNECTORS

Odoo is the dream ERP solution for businesses who want to go **beyond the limitations of "off-the-shelf" ERP programs.** Thanks to its open-source aspect and the 100,000 applications that are already offered, Odoo enjoys **virtually infinite customization options** while retaining all the benefits of a more "traditional" ERP system (see our article on the topic "5 fake ideas about Odoo ERP") We will be working through **the main connectors implemented for Odoo ERP** together to shed some light on the issue



Odoo Connectors FOR FINANCE AND ACCOUNTING

It is rare for finance and accounting to be managed entirely through an ERP system. Indeed, a number of medium-sized enterprises use accounting software providers to help them with this task. As such, the management application software must be capable of **communicating information that accountants need** to easily manage balance sheets, management accounts, and so on. With some ERP systems, extracting data for transfer can very quickly become a complex nightmare. With Odoo, it's the complete opposite. By installing the right connectors (to something like QuickBooks, a commonly used accounting software) **monthly data is transmitted automatically**. If you prefer to send the data manually, that's no problem at all - just change the configuration of the connector! Easy as pie if you have the support of a good integrator.



Odoo Connectors FOR SALES

The sales department is obviously a crucial department for any business. Even though Odoo manages that vast majority of the process, some e-commerce companies prefer to **retain their online websites that are created in Shopify or Prestashop**, for example. In that case, you can effectively connect the ERP system and the e-commerce site. Once again, Odoo has an answer for everything! **A very wide range of connectors has been developed by the Odoo community** to make managing sales via the website and invoicing via the ERP as simple as possible. **Your integrator must remain your main point of contact** so that you can avoid entering into overly technical discussions with the publishers of connector software. Your integrator will act as an intermediary in selecting the connector, integrating it, and managing its operations.

Another essential aspect of Odoo connectors for sales relates to **banking systems**. On an e-commerce website, the ability to offer online payment is essential and, once again, **your ERP system must be able to manage the "dialog" with the banks**. As each bank has its own operational model, adjustments will need to be made to Odoo's "standard" connector. And as you may imagine this can be easily configured by your integrator (the same applies to international banks!).



Odoo Connectors FOR LOGISTICS

Once customers have bought a product on your website, they want to receive their order quickly. That's completely understandable. If logistics activities are not fully automated in your ERP and you have to re-enter data, etc., you risk losing valuable time. With **Odoo and its dedicated logistics modules**, this isn't an issue. However, **relationships with couriers such as FedEx and UPS**, still need to be managed. Interfaces for these giant American overnight services do exist, but for "local" delivery services, custom-made connectors need to be developed.

In France, Captive built a **connector between Odoo and Colissimo** that they provides to clients. The connector enables them to calculate the exact shipping rate for customer, print proper labels, and generate packing lists, etc. These features save the **logistics department tons of valuable time**.



Odoo Connectors FOR EVERYTHING

As you will appreciate, **Odoo is an open, ERP solution that supports change and adapts to your specific requirements**. Odoo is the opposite of management software that constrains you to its limited operating systems. The Odoo creators have specifically chosen **not to specialize in a particular sector, the number of modules and connectors available offer sufficient means to customize the ERP solution**. If by some chance you can't find what you're looking for within the Odoo ecosystem, your integrator will be able to respond to your request with tailor-made customizations.

WHAT CONNECTS A CRM SOLUTION AND ODOO ERP?

Your **CRM solution** allows you to manage relationships with **existing and prospective customers** and track all your interactions with them. An **ERP solution, meanwhile, helps businesses to manage all their operational processes** : procurement, sales, human resources, and so on. Odoo is a complete and highly modular product and, therefore, naturally comes with a CRM solution. Nevertheless, some businesses have their own external **customer relationship management software in addition their ERP software**. In this scenario, what is the right approach? Which data should be synchronized, and how should it be configured? Here are some answers that should guide you in the deployment of your solutions.



What data SHOULD BE SYNCHRONIZED?

To create full synergy between the CRM and ERP software, it is essential to synchronize all core data: customer accounts, various user accounts and information relating to contacts (customers and prospects). Doing so will improve **efficiency, customer tracking, and profitability** and make centralizing all information and administrative documents possible.

This connection provides a **360° view of the customer**: everything from the customer's order history to their managed interactions, accounting data, and after-sales service. However, that's not all: this inter-connectivity also enables you to **remove friction from the business's processes**. Prevent the re-entering of information and reduce the risk of data-entry errors or duplication. That's why good management of data synchronization is essential.



Which software HOLDS THE MASTER DATA?

Certainly, it is important to link the two tools and to synchronize their data. However, it is fundamental to bear in mind that **each piece of software will retain control over its own data**. All information relating to billing, stock management and procurement will be managed by the ERP system, whereas sales and marketing data will be held in the CRM solution. Any change must be entered into the correct software package. It will then be updated automatically in the other solution. This way, all employees will be able to enjoy a **real-time view of the business's activity**.

In the event of any discrepancy between data sets, simply refer to the "master" software package. For example, if a customer's phone number is not the same in both solutions, the number saved to the CRM software will serve as the reference data, and the ERP package will be synchronized and updated accordingly.



Which information SHOULD BE FED FROM THE ERP TO THE CRM SOLUTION?

While ERP can be considered as the backbone of an enterprise, it is not necessary to synchronize all its data with the CRM solution. The fundamental aim is to **share and add more value to the organization's data**. Nevertheless, only information that relates to customers will be useful: orders and invoicing. It's up to you to decide whether to synchronize all invoices and orders automatically, or only a select few (over a specific period, for example).



What level of detail SHOULD BE CONFIGURED?

This depends on what you want to get out of your data. If you wish to improve follow-ups with your customers, simply feeding back the amount and date of orders will be sufficient. However, if you would like to obtain more specific statistics and make use of that data for sales purposes, we recommend that you synchronize every line of each order and invoice. As such, you will be able to analyze your sales by product or line item and **adjust your management and even your production accordingly**.

While there is no doubt that ERM and CRP complement each other, success in achieving this remains a strategic question for businesses and requires a well-structured organization. The quality of the work undertaken in advance will determine the **outcome of the project**. Improved responsiveness and performance will be on the agenda once these two tools are successfully synchronized.



YOUR ODOO INTEGRATOR: CAPTIVEA!

You've made your decision: you want to deploy Odoo ERP in your business! Firstly, congratulations, you've made an excellent choice. Now you need to know **who to work with** to ensure that this ERP deployment is successful.

The integrator down the street, because they are the closest?

No (unless that happens to be us!)

The best known integrator on the ERP market? A high level of popularity means a high skill level right? (No, even though we do have our own fan community, but that's different!)

The cheapest integrator you can find, because that means they really, really want to work with you?

No, because we really want to work with you as well, and don't worry, our prices are very reasonable.

So, who should you work with!?

Well, with Captivea of course! The Odoo integrator par excellence

(with a nice line in offbeat humor too...

We're anything but boring!)

360°

VISION WITH LASER BEAMS

At Captivea, we are the best choice to integrate Odoo because, above all, we have a **global vision** (and laser beams, certainly, but that's not actually that useful for integrating ERP projects, let's be honest... we just wanted to get your attention!) Our teams work on a range of integration projects throughout the year: CRM, ERP, Marketing Automation, and customized developments. **IT systems hold no secrets for us**, We offer a very high level of expertise, consulting services and customer



Our methodology: AGILE FOR PROJECTS TO INFINITY AND BEYOND!

Obviously, implementing outstanding projects (particularly Odoo ERP deployments) requires a well-proven methodology. It is based on a well-known project management principle: agility! The "Agile" project method with Captivea is easily one of the best in the galaxy! Why? Well first off because it sounds like a spaceship. And secondly, because it was developed and improved over many years, having been put to use in projects completed for dozens of clients. To learn more about this method, which could give Buzz Lightyear a run for his money, take a look here: ["Odoo Deployment: an Agile ERP Approach For an Agile ERP"](#)



The team you need: THE DREAM TEAM!

Even though vision and a methodology are great strings to our bow, there is still one element missing: the team to go with it! And, once again, it's time for us to sparkle, Ladies and Gentlemen, because the Captivea team is incontestably the best of all time (in any event for as long as ERP solutions have been around). Why? Because we are the home of Odoo's best experts, with **customer service at the heart of everything we do**.

Our ambition: **TO CONQUER THE WORLD!**

You have to rise to be the cream of the crop, and there's nothing like a good dose of ambition to get there! At Captivea, we have recorded **double-digit growth** for several years (proof that our clients love us, isn't it?) Our team continues to grow in size and we are regularly expanding the scope of our activities, as our **GDPR expertise** demonstrates. In other words, we never succumb to complacency: but we are the best, and we do want to stay that way. To do so, we are driven by high standards and new challenges on a daily basis!



Our expertise: **ODOO, WE LOVE YOU!**

Of course, what you are really interested in is Odoo ERP! If you're not yet convinced that we are the best of the best when it comes to integrating your project, **ask the publisher directly!** We are an Odoo Gold Partner, and have received several Odoo awards over the past few years! We maintain some excellent relationships with members of the Odoo ecosystem and put our expertise to work on the daily. We love Odoo and they love us back!

Conclusion

Now you know all about Odoo and its multiple capabilities (or almost), you might like to take things further and learn how this ERP system can be integrated into your enterprise in particular?

in this case, no problem: contact us to talk about your needs in more detail and formulate a plan for integration.

Hopefully, we'll speak to you very soon

Team Captivea

[Call The Best Odoo Integrator](#)



About Us

Founded in 2007 with the goal of supporting and adding value to company information systems, Captivea now has a staff of nearly 40 people, spread between Los Angeles, Orlando (USA) and Chambéry, Grenoble and Paris (France).

The company operates in 2 major areas. The first being the integration of business management software through the use of ERP, CRM, marketing automation and business intelligence software. The second area includes the development of tailor-made solutions and applications in addition to the implementation of e-commerce sites.

Captivea partners with Odoo to offer its clients a powerful market software solutions that are flexible, easy to deploy and simple to use. The software is then customized to meet the specific needs of each client.

Thanks to over 200 clients, ranging from SMEs to major corporations across various industries, Captivea has developed real-world expertise and a solid understanding of business issues over the years. Our goal: to develop added value! Our method: to put people at the heart of the project and to build a sustainable, trust-based relationship with its clients. Captivea is a team of passionate professionals dedicated to servicing your information system!

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