ODOO, MUCH MORE THAN AN ERP...

Expert Opinion

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Introduction

If you are reading this, you are looking for a powerful management solution for your company. You have probably heard about the Odoo ERP from the media or your peers. It is the software solution that has been on the rise for a few years now: Odoo has achieved nearly 40 million in sales in 2018 with an annual growth rate of nearly 60%! Today, Odoo has more than 3.7 million users around the world and not for nothing! Odoo creators have made agility and ergonomics the software's staple, attracting both small and large businesses alike. Among the biggest customers: Toyota, Sodexo, Bouygues Construction, IBM...

Odoo is suitable for all companies and it is thanks to its adaptive operating mode. Like the Apple App Store, you can enrich your ERP with various and varied functionalities. And if you don't find what you're looking for, no problem, Custom and specific developments are easily possible.

Here is a brief overview of Odoo's capabilities and advantages, supported by the concrete examples highlighted in this E-Book.

Enjoy!

SALES MANAGEMENT: HOW TO IMPROVE EFFICIENCY?

Sales management is at the heart of any company: without an effective strategy on the matter, it is difficult to launch a growth strategy or to become a market leader (unless you are in a monopoly of course)! Indeed, sales teams must be able to call a prospect back within 24 hours, quickly identify the maturity of a lead, know the sales forecasts for a specific geographical area, etc. This requires powerful and intuitive software tools that are easy to use, both in the office and in the field.

Let's see how to improve the efficiency of your sales management with Odoo.

Centralized sales data

To enable your sales representatives to perform better on their daily tasks, it is essential that they have access to a central database. There's nothing worse than the senior salesman leaving the company along with all the data of his customer portfolio. The person taking over will have no way to benefit from customer history.

To solve this, use Odoo's CRM module. It will allow teams to have a centralized database to store all customer information: appointments, invoices, quotes, applied discount rates, etc. Of course, it is possible to configure the CRM and fine-tune management access rights. Each sales representative only has access to his customers' data, while the manager can view everything in order to establish global performance indicators.

Accurately track customer relationships

A good CRM such as Odoo also allows you to follow the customer relationship in detail. How? First off, thanks to customer and prospect tracking: sales representatives are able to know which website pages Mr. X has visited, which emails he has opened, which resources he has downloaded, etc. With this 360° vision, it is easier to determine the maturity level of each lead.

Secondly, Odoo makes building sales scripts easy. Sales scripts are an excellent way to support sales teams in their customer relations. It is a kind of guide for planning activities - calls, meetings, mailing or even quotes - according to the customer's location on the purchasing cycle. An alert can then be sent to the sales representative to quickly act on an opportunity to relaunch or nurture the relationship.

Facilitate the daily life of sales representatives

You can have the best tools available on the market to improve the sales management of your company, but if these tools do not please your employees, they won't have a positive impact. To ensure that your sales representatives adhere to and use the CRM solution, make sure it is intuitive and ergonomic. Also, check that it meets their needs. Having a long list of features doesn't mean a thing if they do not make the user's work easier.

Here is a shortlist of Odoo features truly dedicated to sales representatives: electronic signature, mobile application available in offline mode, automatic email campaigns for specific segments, customized pipeline management, multiple addresses, sales report generation, simple customer preference recording...

The Odoo advantage for commercial management

There are hundreds of CRM softwares on the market. It is therefore difficult to agree on which one of them is best. However, with our knowledge of the market and the various projects carried out at our customers' premises, we are advocating in favor of Odoo for two main reasons. The first is its functional coverage: you may «only» need a CRM to start with, but if the need arises, you can easily add modules for logistics, accounting, point of sale management, etc.

The second is its ergonomics: Odoo is clearly one of the most advanced management softwares on the market in this area.

The user experience is part of Odoo's DNA and it is felt from the first moment Odoo is used.

E-COMMERCE, MARKETPLACE : ODOO MAKES YOUR LIFE EASIER

So, you're the proud owner of a brand new and very successful e-commerce site? The delighted manager of a dedicated space in a marketplace (or market place) like Amazon or Etsy? Maybe you've even combined the two? Putting new items online, ensuring consistency between platforms, managing inventories and suppliers: all these tasks are pretty time consuming aren't they? There's got to be a way to streamline everything. How can you increase efficiency and facilitate the management of your different sales channels?

A simple connection between Odoo and your e-commerce site or marketplace

Although Odoo offers its own powerful and easy to use e-commerce plug-in, the company takes into consideration those who have decided to manage their site with other technologies (Shopify, Magento...). And for those who use only online marketplaces, you haven't been forgotten either. There's good news: you too can enjoy all the power of Odoo. Thanks to the plugins created by Odoo's active community, all you have to do is connect your e-commerce site and/or marketplace to Odoo. This can be done by yourself or by a specialized integrator.

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Centralized management for your product catalog, customers and orders

Centralization and automation are two of the biggest advantages of connecting your site or marketplace to an ERP. This streamlined connection only requires you to maintain a single, up-to-date product catalog. As soon as any information is changed in your inventory, everything is automatically updated on your sites. This is a huge time saver for data management tasks: no more needing to double-check each platform to verify that information has been updated properly. In good practice, it is a better idea to make ERP your «data master» as opposed to your e-commerce site. If you use your e-commerce site as a data repository, it can quickly become overloaded as a result of the marketplace's high volume driven objective. Unfortunately, your site was not built to take on such high volumes. On the other hand, your ERP will be able to handle the load.

And yes, you guessed it; the orders and customer data in Odoo are also centralized thanks to the «Sales» and CRM modules. Once the sale has been made, customer information is transferred in one quick streamlined step. everything in an ERP is interconnected, as it should be.

An automated link between your production and inventory

The Odoo magic doesn't stop here! Thanks to Odoo's very large functional coverage, you have the power to link your e-commerce sites or marketplaces to your production tools. You can set up as many rules as you may need. Odoo, for example, lets you make make-to-order manufacturing and minimum stock rules. When an order is placed on a sales channel, the information is transmitted to your production operations, which then launches the necessary raw material/manufacturing orders.

You can also centralize inventory management in Odoo, even if you have three e-commerce sites with different builds, currencies or languages. Let's take the example of Suomen Automaalit Oy in Finland: with the help of an integrator, they were able to set up a central product data management system that allows information to be pushed to each different platform automatically. If a product is out of stock or a discount is applied, the sites are updated in real-time with each platform's specifications taken into consideration.

The Odoo advantage for e-commerce

Thanks to Odoo, you are sure to be well referenced on the marketplace. Odoo offers an unlimited number of customization possibilities so you can add the number of product attributes you want for each product. Size, weight, material, packaging, etc, these are all specifications the marketplace favors and Odoo allows you to put a whole list of precise criteria online. The best part is that you won't have to input this information multiple times for each sales platform. This feature in turn saves time and ensures improved market visibility.

PROJECT MANAGEMENT : PUTTING TOGETHER AGILITY AND PRODUCTIVITY

The project management challenge of finding the right balance between freedom and structure has always been a tricky issue for businesses. Too much flexibility can often lead to total disorganization. But, making processes more rigid to obtain a clearer vision of project stages can make internal organization more cumbersome and discourage project members.

So, is it better to create your own project management tools in an Excel spreadsheet or trust the market-leading Task Management Software (TMS)? The ideal would be an intermediate solution that would allow you to add structure to your buisness and benefit without sacrificing agility and the uniqueness of your existing processes...What if such software existed?

The winning balance between organization and agility

Project management is an essential component of any company's structure. Without it, there's no collaboration, no constructive brainstorming, no action plans...Nothing. At first, managing a project may seem simple: it's just a sequence of steps and tasks to be carried out in order to successfully complete a project. However, when you take on the role of project manager, you quickly realize that effective management is more complex than it seems. There are several challenges that may arise; time zone differences, conflicting agendas, tools that inhibit effective collaboration or even the constant backtracking that is common in the early stages of a project's life cycle.

Some chose to not use any software and instead utilize Excel spreadsheets to track progress and divide up tasks. Others rely on the functional coverage of the company intranet. Collaborators can use instant messaging services such as Slack or internal social networks such as Yammer that offer group creation features. But once you reach a certain size or number of projects, these methods quickly become unmanageable, at which point it becomes necessary to equip oneself with dedicated TMS software. This makes it possible to iron out certain workflows, simplify and even automate certain tasks. Simply put, it is a way of structuring project management so that everyone can easily find their way around. However, be careful not to compartmentalize and standardize everything, overdo it and you run the risk of completely losing your ability to adapt and evolve.

Implementing good practices for increased productivity

There are dozens of TMS softwares on the market: Trello, Taskworld, Asana, Monday... Each solution has its advantages and disadvantages but lack of flexibility continues to be the most often cited shortcoming. Often times, deploying a task management solution requires a company to comply with its operating mode. This can result in a significant loss of agility. This lack of customization can then become an administrative burden and push employees to revert to their old methods. And let's be clear; this is far from an ideal situation.

But how do you find management software that adapts perfectly to your structure and allows you to implement good practices? Well, let's take a look at Odoo... Odoo creators have built agility into Odoo's DNA. Odoo's ERP suite is reminiscent of building blocks allowing companies to digitalize on a needs basis and add pieces as they grow. Each of its modules, including the project management module, is also very adaptable. Thanks to Odoo, you will be able to take advantage of all the key functions of a successful project management software (Kanban, Gantt, shared calendars, deadline management, implementation of indicators...) without losing hold of your organization's specific processes. Another significant advantage of Odoo? Interconnection.

Create an interconnected digital ecosystem

By choosing Odoo for project management, you are overcoming a huge obstacle: the bridging of your task management software and the rest of your ecosystem. Deciding to integrate a standalone software solution would require a lot of programming to connect it to an ERP, CRM or PLM (Product Lifestyle Management) software. You'd have to manually import/export each file or perform numerous re-entries. In this case, the risks of IT guidance reappears and users will quickly let go of these painstaking processes to simplify their lives.

The advantage with Odoo is that you can create a Digital Workplace, effortlessly: Connect production with project management, accounting, HR, event management, etc. Odoo has a vastly diverse module suite that offers endless possibilities.

INVENTORY MANAGEMENT: HOW TO IMPROVE PROFITABILITY AND RELIABILITY?

If you're in charge of managing inventory, you know how difficult and complex the task can be. Your job includes figuring out how to optimize inventory, coordinating carrier schedules and keeping up with inventory nuances (fresh products, special packaging, etc.), and that's just a small part of the job! There's an overwhelming amount of elements to be taken into consideration and while they are what makes this job so great, they are also the reason why this job can be so complex.

Fortunately, there are software solutions available that can make your life easier, in particular, Odoo's software. Let's take a look together.

Fast and reliable stock management

The goal of inventory management software is not only to simplify your daily life but to also help increase revenue. For this to happen, your data needs to be able to be centralized in one place. This is the case in Odoo, you can manage all your inventories and product flows within the same tool, even if they are from different warehouses or customers.

Odoo's intelligent double-entry inventory system ensures real data reliability and cuts down the amount of time needed to complete tasks. In fact with Odoo, you no longer have to perform manual re-entry: there is no need to enter stock removal or changes. Thanks to Odoo's system all these operations are tracked by inventory movements between available storage locations.

Enable enhanced anticipation with alerts and automation

Of course, we all know that inventory management is a long-term game. Ideally, everything runs smoothly, but every day we run the risk of unexpected events disrupting this well-oiled machine. Imagine if your carrier went on a strike, your warehouse would be filled up with unmoved inventory. Add bad weather and flooding to the equation and your inventory could be damaged. A prolonged power outage and the entire cold chain process can be called into question. As you can see, there are many little parts that can fall out of place and disrupt the system you try so hard to maintain.

Of course, the unforeseeable events that we have just mentioned remain beyond your control. You will have to deal with these unexpected events by having specific safeguards in place (having an emergency power supply and monitoring and reinforcing the building...) in place.

However, for those events that are manageable, you might as well set up a system that helps you anticipate them. This is what you get with Odoo's customizable alerts. You can, for example, create alerts for products or suppliers that appear when a seller creates a quote. Additionally, thanks to Odoo's automation features, you can choose to generate purchase order proposals when a minimum inventory count is reached to replenish your supplies. The same goes for supplier negotiations: if you want to negotiate a price with your suppliers for each specific purchase, an automatic request for a quote can be triggered as well.

Routing, the cornerstone of inventory management

Of course, no one would want an inventory management software without a powerful routing function.The creators of Odoo are well aware of this. This is why they have developed advanced warehouse management functionalities for Odoo. Drop-shipping, cross-docking, and multi-warehouse management are all features included in Odoo's ERP software

With Odoo, you can also develop your personalized storage and pick-up strategy: FIFO, nearest available area, LIFO, etc. The same goes for the ordering process: you can decide to deliver to your customer in one step (delivery note) or break the process into parts (collection, packing, dispatch). Your product routes and «push & pull» routes can also be customized so that you can automate transfer orders between warehouses and locations.

The Odoo advantage for Inventory management

When it comes to inventory management, one of the Odoo's main advantages is its ability to interconnect. Not only with the rest of the Odoo suite but also with carrier softwares from UPS, USPS, FedEx or DHL. And If you work with any other carrier, your integrator can easily make the connection. Captivea has, for example, developed connectors for Colissimo, TNT and Chronopost. And because of its powerful API, the Odoo warehouse management system can do almost anything you want: integration with 3PL, hardware integration (scales, scanners, RFID), etc.

ODOO ERP ADVANTAGES UNCOVERED

Of the bare minimum that we'd expect from an ERP: Odoo does everything we'd hope for and more! It meets your needs in terms of Inventory and project management, e-commerce connectivity, sales management optimization...But that's not all! Odoo is not just an ERP, it is much more than that: it is an agile solution that is capable of meeting all company needs, whether they are simple and standard or very specific and complex. Here is a brief overview of these amazing software features.

HR management and digitization

With Odoo, human resources management is child's play. Everything is stored digitally in one centralized place: recruitment, annual evaluations, HR expenses, absences, attendance times, expense reports, etc. This keeps your personnel directory constantly up to date. Odoo's alert system makes it easy to notify the manager or the HR director of employee leave requests, new applications — you get the picture! with Odoo, you no longer need to outsource your HR management!

Point of sale (POS) management

It's not always easy to choose how to run your store. There's always a question of which hardware to use? or which cash register software is best? With Odoo, everything is designed to save you time and money. The POS management module is compatible with any device (tablets, PCs, industrial machines...) and allows you to have an unlimited number of users. The flexibility of Odoo's POS system allows you to configure its interface to perfectly and intuitively match user needs.

Intuitive and simple website creation

This is one of Odoo's key strengths: the creation of showcase or e-commerce sites. With Odoo you don't need to hire a special web creation agency, you don't even need to know how to code. Odoo gives you the tools and freedom to create customized websites that are on par with industry standards (responsive, UX oriented, etc.).With Odoo's simple drag and drop interface building your site couldn't be any easier. You can start with a basic website and then add features as you go: e-commerce, customer portal, blogs, events... And as if it wasn't a lot already; all the tools necessary for converting visitors into customers are available in the Odoo toolkit!

Subscription management

With Odoo's subscription management module, you can finally focus on your products and consumer relations. All the redundant tasks are automated: invoices, payment management, tax management, etc. Your members have access to a user-friendly portal where they can find all the information that is relevant to them. Odoo has a whole lot of features that your sales team will thank you for! They can finally focus on their new prospects instead of handling all the accounting work for existing customers.

Accounting

Odoo's accounting memo: "Do more, in less time." TThe dream for anyone who has ever had to manage a company's accounting. But how does Odoo turn this dream into a reality? Thanks to several extremely practical features including bank synchronization, with over 15,000 supported banks, easy reconciliation, on-the-fly payment reconciliation, multi-currency management, and much more. If you're not convinced yet, take a look at Toyota. Their automotive and material Handling sector implemented Odoo's accounting module to directly invoice customers from the Odoo software. Some users have even abandoned SAP in favor of Odoo accounting.

The helpdesk

It's possible to manage customer service without a dedicated tool, up to a certain point... As soon as your customer base exceeds a certain size, you have to structure your support and equip yourself with a powerful helpdesk software. The Odoo Helpdesk module is very well designed and perfectly fulfills the needs of growing companies of all sizes. Thanks to a very intuitive interface, tickets can be viewed in a clear, organized and easy to read format. You get an instant overview of team workloads. You can also check the status of a ticket according to your customized service-level agreement rules. Of course, the solution is multi-channel and fully integrated with other Odoo applications for even greater productivity and customer satisfaction levels.

Event management

The objective of event management software is to simplify your daily life. To do this, it is essential that all your events, physical or virtual, are centralized in one place. This is possible with Odoo, you can manage field and web events of any size in the same tool: conferences, trade shows, webinars, festivals, demonstrations... and more! Every stage is integrated into Odoo (dedicated mini-site creation, invitation sending, registration form generation...) and remains fully customizable. You can also benefit from the power of SEO with Odoo promotion tools and manage online payments directly from the platform as well. You're pretty much guaranteed to see productivity improve with all of these powerful features!

ODOO INTEGRATION: TIME TO CALL A SUPERHERO!
(BUT CHOOSE WISELY) !

There's no turning back now: from now on you will share your life with Odoo (at least at work). Its intuitiveness, functional coverage, customization possibilities and attractive price has seduced you... what more could you want? Ah yes, you need a matchmaker now, someone who knows how to connect you (for the best of course) to the Odoo ERP. In other words, you need an integration superhero, one capable of fulfilling your wildest dreams and making this new encounter between you and Odoo a wonderful love story.

Here are a few tips to help you make the right choice...

Choose a hero with powerful allies

Being a superhero is good. But being a superhero with strong allies is even better. You've seen it before; the X-Men, Avengers, Indestructibles... All of these teams decided to unite because they realized the strength in numbers. Just ask Deadpool. In his second movie, he finally had to change his mind and find some strong partners to take down Cable (the villain)...

As for your future integrator, their most important ally is the publisher. The integrator you've chosen MUST be an Odoo partner. Don't hesitate! Having an Odoo partner as your integrator means you're in the hands of someone who has real expertise and knowledge of the Odoo ecosystem.

Test the hero's real-world knowledge

You know as well as I do that superheroes are great, but sometimes they can be a little disconnected from the real world. Superman, when he's half-awake, must think everybody can fly... ...and Batman, even on a hot day, walks around in his black cape... They don't always understand the problems of «normal» people and their little everyday concerns. ...so it's hard for them to respond to Mr. And Mrs. so and so's needs in a practical way.

 The same holds true for an integrator... choose a superhero, but, more importantly, a superhero with real field knowledge! The integrator must understand the context of the company he's addressing, their business specificities, etc. When you meet your integrator, you must feel that you share the same values, that you are on the same wavelength, that you speak the same language. That's how you build a lasting relationship.

Make sure you chose a well-equipped superhero

Every superhero has their favorite set of tools for carrying out a mission: the batmobile, breathtaking costumes (or not, Spiderman has questionable clothing choices), lightsabers and so on. Take them away and they quickly lose their powers. It's like Magneto without his helmet or Wonder Woman without her magic lasso, it's not the same story!

For your future integrator, this is also true. Whoever you choose has to be able to show their favorite tools, such as a well-established methodology or RGPD expertise for example. Without these present as proof, it is difficult to know whether or not your integrator will be able to lead your Odoo integration project to success

Check out your hero's track record

It's not enough to just call yourself a superhero. To be a superhero, you definitely have to have superpowers, but above all, you have to have accomplished heroic feats! No, helping grandma cross the street is not one of them (that's just kindness and common sense). And, of course, bragging about incredible feats without anyone being able to verify that they actually happened isn't part of it either (despite fake news getting bigger and bigger…).

As you can see, in order to be sure that your provider is indeed an Odoo integration superhero, you have to be able to validate their claims. To do so, it is essential that they can give you references to call, customer testimonials on which you can base yourself or even E-Books, webinar recordings, etc… If they are able to provide you with everything and meet the above criteria, then you let go of any doubts and go for it! (Come on, we'll help you a little: contact super Captivea)!

Conclusion

Even if Odoo is presented as an ERP, in the end, it is much more than that. With Its flexibility and high performance it is capable of meeting all the company's needs: from administration, to production, through HR and marketing… This is clearly what makes it stand out and that is why we highly recommend this software.

Of course, in order to take full advantage of Odoo it is best to use an integrator. They will choose the most suitable applications, secure the connection to your other tools (before you decide to manage everything in Odoo!), manage the maintenance, etc. This will ensure that you're using Odoo to the best of its abilities!

About Us

Founded in 2007 with the aim of supporting and adding value to company information systems, Captivea now has a staff of nearly 40 people, spread between Los Angels, 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 SugarCRM, Odoo and Mautic to offer its clients market-standard software solutions that are flexible, easy to deploy and simple to use. These softwares are then customized to meet the specific needs of each client.

Thanks to more than 200 clients, ranging from SMEs to major corporations across various industries, Captivea has developed real expertise and a solid understanding of business issues over the years. Its main goal: to develop added value! The 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 people dedicated to servicing your information system!

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