

# Odoo haladó

## (15 felhasználó)

### A haladó csomag az alábbi modulokat tartalmazza:

CRM, számlázás, értékesítés, website, webshop, könyvelés, projekt, készlet karbantartó, beszerzés, munkaidő, e-mail marketing, szabadságok kezelése/nyilvántartása, feliratkozás, aláírás, Studio, helpdesk, dokumentumok, helyszíni munka

### CRM

- **Accurate forecasts:**  
Use actionable data to make better decisions.  
Get the insights you need to make smarter decisions.  
Design custom dashboards to get a picture of your business at a glance.  
Dig deeper with real-time reports and flow charts that anyone can create and share.
- **More done in less time:**  
Schedule activities based on your sales scripts: calls, meetings, mailing, and quotations. Get all the information you need, directly on the opportunity: website pages viewed, mail received, etc.
- **Real-time overview:**  
Know exactly how you perform compared to your monthly targets.  
Organize your work based on your scheduled next actions.
- **Stay connected to your customers:**  
Real-time messaging to enhance collaboration.  
Get a quick overview of what's going on in your team. See when a colleague logs a call or sends a quote. Share ideas and files in real-time and catch-up on things you missed when you were away.

### INVOICING

- **Get paid faster**  
Accept online payments via Paypal, Ingenico, Buckaroo, Stripe, Authorize.net, Atos Wordline or Adyen. Eliminate the hassle of sending reminders for late or outstanding payments. Automated follow-ups are simple to configure and help to streamline billing to make payments quick and easy.
- **Simplify your accounting**  
Use the status overview to help keep track of drafts, paid and unpaid invoices.  
Automatically record all transactions from your bank accounts by importing and reconciling your bank statements
- **Analyze your sales**  
Get direct access to key information with dynamic and customizable dashboards. Make your own definition and analyze your invoicing by products, customer, salesperson, etc.

### SALES

- **Sell faster with electronic signatures**  
Allow customers to easily review and sign your online quotations from anywhere

- **Communicate quickly and efficiently**  
Get custom alerts for relevant activities, communicate directly from quotations via email, automatically keep complete records of your negotiations.
- **Maximize profits by upselling**  
Increase sales volume by automatically proposing extra options and accessories, apply closing triggers, discounts and more
- **Sell more with clean quotations**  
Send clear and complete quotations to your prospects. Add product descriptions, beautiful images, and additional information simply by dragging and dropping building blocks.
- **Order and contract sorting**  
**From quotations to sales orders**  
Convert quotations into sales orders with a single click, or let the customer sign off on it with a simple electronic signature  
**Contract management**  
Invoice customers based on time and materials, easily record contracts and track invoicing phases, maintain renewal and upselling opportunities, and manage your subscriptions with Odoo's recurring contracts.  
**Let your customers help themselves**  
The customer portal gives your customers access to their quotations, sales orders, and delivery orders. Save time and use Odoo Sign to easily get signatures on NDAs, contracts, or any PDF document.

## WEBSITE

- **What you see is what you get**  
Insert text styles like headers, bold, italic, lists and fonts with a simple WYSIWYG editor. Flexible and easy to use.
- **Building blocks system**  
Create your page from scratch by dragging and dropping pre-made, fully customizable building blocks.
- **Customization tool**  
Click and change content directly from the front-end: no complex back end to deal with.
- **Word processor text editing**  
Create and update your text content through an editor designed to replicate the word processor experience.
- **Promote tool**  
Improve your ranking on search engines and your organic traffic thanks to keywords suggestions and meta tag tool.
- **Social media call-to-action**  
Share your pages through social media networks
- **Multi-websites**  
Publish several websites with their own URL, layout and content (pages, products, blogs, events, jobs, etc.). This opens up wide possibilities of diversification and customer segmentation for your business.
- **Link tracking**

Add a tracking code to your URL's and measure all your marketing campaigns from the first click to the final sale. Identify which campaigns are the most effective in attracting visitors to your website and generating revenue.

- **Translation tool**

Add a tracking code to your URL's and measure all your marketing campaigns from the first click to the final sale. Identify which campaigns are the most effective in attracting visitors to your website and generating revenue.

- **Mobile preview**

See what your page will look like on a mobile device with the mobile preview button.

- **Live chat embedded**

Provide your visitors with information in real time directly website through a pop-up chat window.

- **Bootstrap based templates**

Easily design your own Odoo templates thanks to clean HTML structure and bootstrap CSS.

- **Fluid grid layout**

Create the best layout corresponding to the devices which the website is displayed.

## WEBSHOP

- **Custom product pages in seconds**

Effortlessly create custom designs for product pages to showcase your business in a unique way.

Drag and drop building blocks to snap your designs into place and showcase your inventory.

Add product attributes such as color, size or style to keep product lines easy to navigate.

Edit product pages with ease to always have your product information displayed the way you want it to be seen.

- **An All-in-One solution**

With an integrated eCommerce platform, inventory and sales can easily be maintained via automatic stock adjustments and reporting.

Dedicated customer portals help keep customer data organized with order tracking and claims, allowing customers to download invoices and delivery orders as well as view pending shipments from a single location.

- **Marketing optimized**

Boost your sales with cross selling and upselling opportunities on product pages, in the cart or at checkout.

Automatically recommend product accessories or suggested products and alternatives to show customers more of the items they might like, as well provide increased exposure to all of your items in stock.

- **Payments: fully integrated**

Allow customers to pay with Paypal, Ingenico, Adyen, Buckaroo, Authorize.net, PayUmoney, Stripe and SIPS Worldline. Online payment methods redirect customers to a 'Thank you' page on your website

- **Shipping: UPS, DHL, FedEx, USOS and more**

Speed up your order fulfillment with easy integrations for major shipping carriers and track your packages directly from Odoo. Select across multiple rates from shipping providers and print shipping labels with just a click.

- **Ready-to-use themes**

Fully customizable pages and themes that allow you to create a professional design without being a designer. Easily adjust pages to fit your company's unique style.

## ACCOUNTING

- **Popular features:**

- **Bank Synchronization**

- Get your bank statements synced with your bank automatically, or import files

- **Invoicing**

- Create sharp and professional invoices, manage recurring billings and easily track payments.

- **Manage Bills & Expenses**

- Control supplier invoices and get a clear forecast of your future bills to pay

- **Easy Reconciliation**

- Save time and automate 95% of reconciliation with our smart reconciliation tool

- **Electronic invoicing and automated follow-ups**

- Create and send professional invoices and receive payments online.

- Send reminders to your debtors in just a few clicks. Simply set-up and automate follow-ups to get paid more quickly.

- Automatically create invoices from sales orders, delivery orders or base them on time and material

- **Clear dynamic statements**

- Easily create your earnings report, balance sheet or cash flow statements.

- Quickly filter, zoom, annotate and compare any data.

- Use business intelligence's cubes to report across any dimension.

## PROJECT

- **Forecast needs & resources**

- Schedule your teams across projects taking employees' holidays into account. Plan ahead for upcoming projects with forecasts based on comparable projects and estimate deadlines more accurately. Compare forecasts with real timesheets for increased profitability

- **Harness the power of visual information**

- Simplify your processes and enhance employees collaboration.

- Break down your project in bite-sized tasks and assign them to your team for improved collaboration.

- Create customized stages for each projects to simplify your workflow overview and increase overall project efficiency.

- **Discuss tasks, share documents**

- Add quick notes or attach files to any task and stay connected to your team. Forget endless follow-up meetings to keep track of projects. Communicate through the chatter, write in a shared real-time pad, or use live chat – all within a single interface.

- **A functional and dynamic graph view for every task**

Create graph views to analyze your data utilizing a powerful search tool, filter and grouping functions and a variety of unique visual interfaces to help you track and maintain your projects from any level.

## INVENTORY

- **Improve performance & process time**  
Get the most efficient stocking method and improve all your internal operations. Odoo's double-entry inventory has no stock input, output or transformation. Instead, all operations are stock moves between locations.
- **Less stock, no stockouts with fully automated replenishment**  
User order points and automated RFQs to make your supply chain more efficient than ever.
- **Advanced features made simple**  
Use cutting-edge automation and advanced routes to manage any warehouse
- **Experience total traceability**  
Track every stock move from purchase to warehouse bin to sales order. Trace lots or serials upstream or downstream from anywhere in your supply chain.
- **Clear and complete reporting**  
Make smarter decisions with real-time dynamic reports that you can save and share with anybody. Keep key information at your fingertips with custom dashboards.

## PURCHASE

- **Automate your purchasing workflow**  
Improve your purchase and inventory performance with procurement rules depending on stock levels, logistic rules, sales orders, forecast manufacturing orders, etc. Select different replenishment methods for each product depending on your manufacturing and delivery strategies.
- **Supplier price lists & product availability**  
Easily import suppliers' price lists and references to make smarter purchase decisions based on promotions, quantities and special contract conditions. Keep track of a product availability in your supplier's stock and check your order status from within the app. You can even base your sales price on your supplier's prices.
- **Get the best offer with purchase tenders**  
Launch purchase tenders, integrative vendor's answers in the process and compare propositions. Choose the best offer and send purchase orders easily. Use reporting to analyse the quality of your vendors afterwards.  
You can also use Blanket Order Agreement to buy goods from a supplier at a negotiated price, on a recurring basis during a specific period of time.
- **Get statistics on your purchases**  
Get accurate statistics on your suppliers' performance through flexible reporting: delivery delays, negotiated discounts on prices, quantities purchased, etc. Integrate purchases with analytic accounting to analyze your contracts' profitability.
- **Manage several companies**  
Use a single Odoo instance to synchronize operations between different companies or warehouses. Create sales orders, share customers, suppliers and products and

manage invoices for all companies at the same time. You can save even more time by automating the invoicing process between all the companies!

## **TIMESHEET**

- **Any device, anywhere**

Whether you're running a small business, a freelance professional, or managing employees from different locations, you need your tools to be as mobile as you are. Log in and track your time through any device, anywhere.

- **Task management, time-tracking and weekly timesheets**

**Be proactive**

For professionals who like to plan their activities at the beginning of the day. Use the Day Planner to allocate your time in advance to the day's tasks.

**Every minute counts**

For professionals who need to track their work in detail – Launch the timer from your desktop in a single click. Just choose your task and switch it on.

**Focus on what matters**

For professionals who bill per hour or day – Just focus on your work and record your activities at the end of your day.

- **It's fast**

When you need to do dozens of activities per day, every second counts. Odoo Timesheet is as fast as you are.

- **It works offline**

Odoo Timesheet stays up and running even if there is no internet connection. Just launch your timesheets as usual and the data will sync your account once you're back online. It's that simple.

- **Manage your activities & workforce**

Keep your projects under control and manage employee time from the Odoo backend.

**Track your team's progress**

Visualize your team's progress on each project or task. Tracking expected hours, effective hours and reforecasts on tasks has never been so easy.

**Keep your projects profitable**

Get an overview of your billable time. Track all the resources allocated to your project and see your profits and losses.

**Invoice timesheets to clients**

Automatically generate one-time or recurring invoices based on expenses and timesheet entries.

- **Forecast needs & resources**

Schedule your teams across projects taking employees' holidays into account. Plan ahead for upcoming projects with forecasts based on comparable projects and estimate deadlines more accurately. Compare forecasts with real timesheets for increased profitability.

## **EMAIL MARKETING**

- **Build awesome campaigns**

Craft successful email campaigns that resonate with your prospects without any IT knowledge. Get total control over your email content and layout thanks to an intuitive and easy-to-use software.

You don't feel like designing newsletters on your own? No problem! Just select one of our many templates, readjust the layout, add your message and images and you're ready to send your new campaign!

Just choose your building blocks and drop them exactly where you want them to appear on your email. Enrich your content with titles, calls-to-action, social media buttons, or footers in just one click.

- **Segment your database**

Optimize your results by sending your campaigns to targeted groups within your database. Select leads, customers, or any other group from your contacts list by country, by date, by function, and more, all designed to make sure you send your content only to the people you want to share your campaign with.

- **Works on any device**

Be sure that your email newsletter is optimally displayed on every screen – whether it is a tablet, mobile phone, laptop, or desktop computer. Our dynamic content will adapt automatically to your subscriber's screen by adjusting spacing and optimizing images, offering comfortable readability on any device.

- **Improve your campaigns**

Get accurate, and real-time statistics on every email sent out. Easily track the number of leads created, orders, the amount of revenue generated, your open rate, bounce rate, click-through rate, and improve your overall marketing strategy. Follow the opportunities generated and track the expected revenues.

- **Advanced features**

Add tracking code to the links within your email campaigns and get a complete view of the performance of each campaign's performance on a dedicated dashboard with the Odoo Link Tracker.

Follow your opportunities through Odoo CRM and analyze the conversion rate, the expected revenue and the generated revenue of each of your campaigns. Use filters for more in-depth analysis.

## TIME OFF

- **Manage employee leaves: keep track of all your employees vacations**

Keep track of the vacation days taken by each employee. Employees enter their requests and managers approve and validate them, all in just a few clicks. The agenda of each employee is updated accordingly.

Managers get a view of their whole team leaves in one complete view, to keep the team well-organized and to easily forecast the distribution of tasks during the absence of their members.

- **Approve or refuse leave requests: handle all requests from your employees**

Allow employees to record their requests for vacation themselves, and get notified by email for every new request. Decide to either approve them or to refuse them, and add a note to your refusal to give an explanation to your employees.

- **Get reports to plan ahead: simple reporting tool**

Create reports in a single click for every leave request, with a detail per request type, employee, department and even for the whole company. Get statistics on the leaves and plan for the upcoming to make sure you keep productivity to its highest level.

## **SUBSCRIPTIONS**

- **Focus on selling great services: simple features to manage subscriptions automatically**  
Concentrate on services and relationships while Odoo's automated features handle your recurring sales and subscriptions. Quickly provide clear contracts and flawless, automated invoices; take care of taxes with no stress; and deal with payments - all done automatically according to your settings.
- **From happy visitors to satisfied customers: Create great long lasting relations with your subscriber**  
**No login required and easy signup**  
Increase sales by getting rid of login requirements and making signup simple.  
**User-friendly portal**  
Give your customer access to a user-friendly portal with all their data and contract options at a glance  
**Automatic payments**  
Save time by setting payments to automatic. Invoices are automatically issued for successful management.
- **Get a more efficient sales force: save time on routine tasks and focus on growing revenue**  
Speed up your sales team with contract templates for your most frequent sales scenarios.  
Let dissatisfied customers end contracts themselves and give you the reason for their decision. Or ask them to contact you first.  
More focused sales people are more productive. Let them focus on acquiring new customers.

## **SIGN**

- **Get documents signed up faster: simplify your processes, boost your productivity**  
Odoo Sign is a fast and convenient way to send, sign, and approve documents. Prepare contracts by dragging & dropping blocks to be completed by the parties, submit signature requests in seconds, and track the status of sent documents.
- **Go paperless, increase ROI: embrace all the benefits of our easy and fully integrated electronic signature solution**  
**Cut costs**  
Forget hidden costs like printing, copying, faxing, scanning, shredding, and posting. Everything is accessible online from any device. Never lose important documents again.  
**Save time**  
Stop waiting for days or even weeks for all parties to sign your documents. Move forward and close your deals in just a few clicks.  
**Reduce errors**



Eliminate manual operations and improve the quality of the documents filled out and signed. Make sure parts that require a signature are signed.

- **Eliminate all risks: don't worry, we've got you covered**

**Secure identification**

All communications on the documents are encrypted to ensure only authorized people can access the content and that the document.

**Documents Integrity**

Odoo keeps the authoritative document under control at all times. Any activity on the document (read, sign, etc.) is encrypted to ensure document inalterability. An audit log report is available to all the parties at any time.

**100% Legal**

Documents signed via Odoo Sign are valid electronic signatures under EU Regulation 910/2014 (eIDAS), in and US ESIGN Act. They also meet the requirements for electronic signatures in most countries.

- **Support every level of your organization: streamline your entire workflow and increase efficiency**

**Sales & operations**

Improve win rates and reduce the sales cycle by automating the signing process of your contracts. Improve your relationships with customers.

**Human resources & staffing**

Improve hiring processes and interactions with applicants by sending electronic evaluation forms and employment contracts.

**Tax & accounting / administration**

Easily keep track of all documents, delays and procedures. Stay organized at all times with all documents available electronically at hand

## STUDIO

- **Code-less**

Create custom applications in minutes rather than weeks, with no development.

- **Developer Friendly**

Unlock the developer mode to get access to technical details.

- **Mobile Apps**

Design your custom application once, and get a desktop and a mobile app automatically.

- **Scale easily**

Odoo Studio is built for large companies with millions of records. The generated applications are blazing fast.

- **Forms**

Create advanced forms with notebooks, inline discussion widgets, integrated statistics, etc.

- **Kanban**

Design cards that can be dragged & dropped in columns for process-oriented documents.

- **Lists**

Create read-only or read-write lists that look like Excel spreadsheets.

- **Pivot Table**

Create custom pivot tables on the data; drill-down on any dimension and display several measures.

- **Calendar**  
Use the calendar view to manage documents linked to a schedule.
- **Website Forms**  
Create website forms to allow your visitors to create records directly from your website.
- **Kanban**  
Design cards that can be dragged & dropped in columns for process-oriented documents.
- **Graphs**  
Get beautiful statistics on your custom objects with the graph views: pie charts, line charts, bar charts, etc.
- **Gantt Charts**  
Gantt charts are great for time-related documents like events, meetings, planning, etc.
- **Grid**  
The grid view is convenient to massively edit records with a multi-dimensions matrix view.

## HELPDESK

- **Awesome user interface: track, prioritize and solve customer tickets**  
Organize your tickets the way you want with the amazing kanban view.  
Get an instant overview of your team's workload and check the status of a ticket based on your custom tailored SLA rules.
- **Multi Channels, out-of-the-box: get in touch with your customers where they are**  
Email: new incoming emails create tickets automatically  
Website form: qualify your customers queries with a customizable website form.  
Live chat: use the Live Chat plugin on your website to instantly engage visitors
- **Optimized for productivity: SLAs, automation, templates and canned responses**  
Odoo Helpdesk is optimized for your team's productivity:
  - Create your SLA rules and let Odoo take action automatically.
  - Automate emails or actions at different stages of ticket resolution.
  - Define dynamic email templates to automate the most common responses.
  - Escalate tickets to your manager in just a click.
  - Invite experts into a live discussion.
  - Use canned responses in live chat for instant answers.
- **Sell support contracts: sell, renew and upsell easily**  
Sell support contracts to automatically provide helpdesk services to your customer. Track time on each contract with the timesheet app, and upsell automatically with time-limited contracts. Create alerts for your sales or helpdesk team based on your customer status.
- **Provide smarter self-service: built-in customer knowledge base**  
Develop your self-service platform by directly linking your FAQ, training videos, and presentations on a ticket. Develop a community around your product with the forum.
- **Allow customers to close their tickets: grant autonomy. Improve productivity**

Reduce the chance of error, avoid misunderstandings and leave more time for Helpdesk Teams to worry about what truly needs their attention.

## DOCUMENTS

- **DMS reinvented: move to paperless approach**

With Odoo Documents, you can easily share, send, categorize, and archive scanned documents. You can also generate business documents such as vendor bills, tasks, and product sheets for manufacturing.

**Streamline your workflow**

Take advantage of a fully integrated approval, control, and validation process, with activities, chatter, and action rules to make sure everything gets done by the right person at the right time.

**Email gateway**

Using the email gateway, bills are created automatically from a scanned document or directly from your vendor's email.

**Collaborate with your team and clients**

Assign documents to your colleagues, customers, or vendors. Share files and public folders with your clients, and let them import documents directly.

**Seamless work with Sign**

Don't waste time printing and scanning documents that someone has to sign. Instead, assign them to the right person, get them e-signed, and have them sent directly back

**Process documents in batch**

Work in batch by requesting approvals, changing folders, tagging and assigning multiple files at once instead of one by one.

**Integrated with Odoo Apps**

Documents integrate with other Odoo Apps. Track versions of plans and worksheets with PLM, create your vendor bills in one click with the help of our AI in Accounting or create tasks from specific documents.

- **See how much time you could save**

Use the interactive calculator below to estimate the number of manual document-related tasks you or your employees do each month.

- **Do more in less time**

With Documents, everything is where you need it, instantly available. Keep track of all your files and never lose one; they are all organized and stored in the same place, safe and secure.