

How to Monitor Daily Activities of BDG

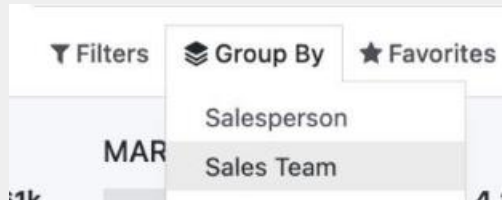
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Monitoring Personal Progress

The complete and timely creation and update of activities associated to opportunities, the complete and timely creation of quotations, their update unto Sales Orders (SOs) when confirmed and the timely update of the opportunity stages and won/lost and proper and timely handling of tickets in Odoo allow for the automatic creation of various reports and graphs that allow sales personnel to monitor its activities.

The tools for monitoring personal progress can be used for team monitoring. Compared to the below, the additional step of grouping per teams is required:



1. Opportunity Pipeline

- a) The landing page of the Odoo CRM module presents the opportunities per stages of the pipeline.
- b) The Pipeline section of the Reporting tab of the Odoo CRM module presents a visual pipeline analysis. Filters and grouping allow for additional views, while Favorites allow to save the result (ask “search”) or add it to a dashboard. Grouping per lost reason is a useful tool provided the information is encoded in each opportunity.

2. Activities

- a) The My Activities section of the Sales tab of the Odoo CRM module presents the opportunities in a table.

Monitoring Personal Progress

b) The Activities section of the Reporting tab of the Odoo CRM module presents a visual analysis. Filters and grouping allow for additional views, while Favorites allow to save the result (ask “search”) or add it to a dashboard.

3. Quotations

- a) The My Quotations section of the Sales tab of the Odoo CRM module presents the quotations and Sales Orders (SOs) in a table.
- b) The Forecast section of the Reporting tab of the Odoo CRM module presents a visual analysis of expected incoming sales. This is fully dependent on the provision of an expected closing date in each opportunity. Filters and grouping allow for additional views, while Favorites allow to save the result (ask “search”) or add it to a dashboard.



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