

Updated on 10/17/2024

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## Odoo Commercial training

1 day (7 hours)

### Presentation

Use Odoo all-in-one ERP to manage your sales processes! Benefit from a [modern, intuitive interface](#) to track your customers' lifecycle. You'll save a lot of time by managing your leads and opportunities, and keeping track of your prospects and future business.

You can propose commercial offers to your customers by creating quotations, which you can then transform into purchase orders and invoices.

Our sales-oriented Odoo training course will first introduce you to the interface and its navigation. You'll learn how to build your first Odoo database.

You'll learn about the product's various functions, as well as the fundamental modules for business management (CRM, accounting, purchasing, sales...).

At the end of this course, we'll also be able to tackle a related topic: website, point of sale, production.

After this course, you'll know how to use Odoo for your sales missions. As always, we'll teach you the latest version of the tool presented: [Odoo 18](#).

### Objectives

- Understanding and using the odoo interface
- Use standard Odoo sales workflows
- Set various options for sales, CRM and billing software

### Target audience

- Transformation managers
- Managers
- Project managers
- Business developers
- Sales
- Account managers

## Prerequisites

No prerequisites, knowledge of Odoo is appreciated.

## Technical requirements

If your machine runs on Windows, set up a virtual machine with Linux or install WSL.

## Odoo Commercial training program

### Navigating Odoo

- Login
- The dashboard
- Screens and views
- Filters/groupings/favorites
- Data entry
- Navigation between screens (breadcrumb trail)

### Creating your own Odoo database (practical exercise)

- General configuration
- Data creation: items, suppliers, customers

### Use fundamental management modules (practical exercise)

- Sales
- Purchase
- Inventory
- Accounting
- CRM

### Additional themes

- Topics to be discussed at your request
  - Production
  - Point of Sale
  - Website

## Companies concerned

This training course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced computer technology, or to acquire specific business knowledge or modern methods.

## Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the training to come, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

## Teaching methods

Practical course: 60% Practical, 40% Theory. Training material distributed in digital format to all participants.

## Organization

The course alternates theoretical input from the trainer, supported by examples, with brainstorming sessions and group work.

## Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

## Sanction

A certificate will be issued to each trainee who completes the course.