



ODOO CRM IMPLEMENTATION

Connecting Sales Opportunities with Business Operations

Industry focus: Custom Furniture Manufacturing

BUSINESS OVERVIEW

A custom furniture manufacturer receives enquiries from homeowners, interior designers, architects, hospitality businesses and commercial buyers. Each project may involve design requirements, measurements, material choices, quotations, production schedules and delivery coordination. Odoo CRM can organize leads and opportunities, while other Odoo applications may support connected sales and operational workflows when configured and licensed for the business.

Project snapshot

Area	Solution focus
Industry	Custom furniture manufacturing and made-to-order projects
Platform	Odoo CRM, with relevant Sales and operational apps where required
Core challenge	Sales enquiries, quote follow-ups and project details managed across spreadsheets, email and separate tools
Primary goal	Create a clear path from initial enquiry to quotation, order handover and customer follow-up
Delivery approach	Discovery, process design, configuration, data preparation, integrations, testing and training

Executive summary

The manufacturer handles projects with varied dimensions, materials, finishes, quantities and delivery expectations. Information can change as a prospect moves from inspiration to a confirmed specification. When sales conversations and quote versions are stored in separate places, staff may work from outdated details, overlook follow-ups or pass incomplete information to estimating and production teams.

Liyan IT Solution's proposed Odoo CRM approach establishes consistent lead capture, qualification, opportunity stages, activity tracking and quotation follow-up. Where the business uses connected Odoo Sales, Inventory, Manufacturing or other applications, the implementation can define a suitable handover of approved customer and order information. The exact workflow depends on the selected Odoo version, apps and configuration.

Intended business outcome

Give the sales team a shared view of every project enquiry, make the next action visible, improve quotation follow-up and reduce information gaps between customer conversations and downstream teams.

SOLUTION PRINCIPLE

Start with a clear sales process and reliable project data. Extend the workflow into other business applications only after confirming which teams need the information and how it should be handed over.

01 | Business challenges and requirements

Made-to-order furniture sales involve more detail than a standard product purchase. A customer may change dimensions, finishes, quantities or delivery dates during discussions. The CRM process must keep the commercial opportunity organized without trying to replace detailed design, estimating or production controls.

Key challenges in the scenario

- Enquiries arrive through website forms, email, phone calls, designers and referrals, but are not recorded consistently.
- Sales notes and customer requirements can be scattered across email threads, spreadsheets and individual documents.
- Quote follow-ups rely on manual reminders, making it harder to identify prospects awaiting a response.
- Opportunities lack consistent stages, expected values, decision dates or clearly assigned next actions.
- Repeated changes to specifications can cause confusion about which details are current.
- Estimating, sales and production teams may receive incomplete information during handover.
- Managers have limited visibility into lead sources, conversion, expected order value and stalled opportunities.

Requirements mapped to Odoo

Requirement	Proposed approach
Lead capture	Record source, customer type, project category, approximate budget, timeline and contact details.
Qualification	Use consistent criteria for fit, project scope, decision process, location and readiness.
Opportunity pipeline	Define stages from new enquiry through consultation, specification, quotation, negotiation and outcome.
Activity tracking	Log calls, meetings, design discussions, quote follow-ups and tasks against the opportunity.
Quotation process	Use the appropriate Odoo Sales workflow where included, with approved product and pricing information.
Operational handover	Define which customer, product and order details pass to estimating, inventory or manufacturing workflows.
Reporting	Track lead sources, pipeline value, quote status, stage ageing and won/lost reasons.

Discovery and scope decisions

Liyan IT Solution would confirm the Odoo edition and version, apps in use, quotation requirements, product configuration complexity, data sources, user roles and reporting needs. Advanced product configurators, manufacturing planning, CAD/design tools, inventory availability and accounting integrations must be assessed separately to confirm whether standard apps, configuration or custom development are required.

SUCCESS MEASURES

Establish a baseline for response time, overdue quote follow-ups, opportunity data completeness, time in each stage, quote-to-order conversion and user adoption.

02 | Proposed Odoo CRM solution design

The proposed solution uses Odoo CRM to organize the commercial pipeline and coordinate activities. Related Odoo apps can be included when they support an agreed process, but the CRM should remain simple enough for sales staff to maintain accurately.

Core components and connected workflows

Component	Role in the furniture workflow
Leads	Capture new enquiries before qualification, including customer type, project category and source.
Contacts and companies	Maintain homeowners, designers, architects, hospitality buyers and business accounts.
Opportunities	Track project value, expected close date, sales stage, specification status and next action.
Activities	Record calls, meetings, design discussions, measurements and quotation follow-ups.
Odoo Sales (if in scope)	Prepare and manage quotations using approved products, pricing and commercial terms.
Inventory (if in scope)	Support relevant stock and material visibility, depending on configured products and operations.
Manufacturing (if in scope)	Support production workflows after a confirmed order and defined handover.
Reports and dashboards	Provide pipeline, source, stage ageing, quotation and outcome visibility.

Example opportunity stages

New enquiry — Record contact, source, furniture category and initial project request.

Qualified — Confirm customer fit, project scale, budget range, location and target date.

Consultation / design brief — Capture needs, intended use, style, dimensions and decision-makers.

Specification and costing — Confirm required materials, finishes, quantities and costing inputs with the relevant team.

Quotation sent — Record quote version, date, validity period and next follow-up.

Negotiation / revision — Track requested changes, approvals, revised terms and decision timing.

Won / lost — Record the outcome and reason; for won deals, trigger the approved order handover.

Data quality and integrations

Agree which fields define the latest approved specification and where detailed drawings or design files will be stored. Website forms, email, quotation tools, inventory or manufacturing apps should be connected only after defining data ownership, synchronization direction, permissions and error handling. Avoid duplicating complex production information inside CRM fields when a dedicated operational record is more suitable.

ACCESS AND MIGRATION

Use role-based access, agreed required fields and duplicate rules. Clean and map customer and opportunity records, test imports, reconcile key data and obtain business approval before production migration.

03 | Workflow automation and reporting

Automation can help the team follow up on enquiries and quotations consistently, while keeping specification and production decisions under the control of the appropriate people.

Illustrative enquiry-to-order workflow

1. Capture the enquiry

A customer or design partner submits a form or contacts sales. The lead records customer details, project category, source and known requirements.

2. Assign and acknowledge

The enquiry is assigned by product category, territory or team responsibility. The owner receives a task to make contact.

3. Qualify the project

Sales confirms scope, budget range, decision-makers, required date and whether a consultation or site measurement is needed.

4. Build the specification brief

The team records the agreed requirements and links relevant drawings or documents using the approved document process.

5. Prepare and send the quotation

The responsible team prepares pricing and terms through the configured quotation process. The CRM records the status and follow-up date.

6. Manage revisions

Requested changes are documented, and the team confirms which quote and specification are current before progressing.

7. Close and hand over

A won opportunity triggers a checklist for order confirmation and handover to the relevant sales, inventory or manufacturing workflow where included.

Automation candidates

- Create a follow-up task when a new lead is assigned.
- Notify the owner when a quotation follow-up date is due or overdue.
- Flag opportunities missing a next action, target date or key qualification details.
- Require a lost reason when an opportunity is closed without an order.
- Create a handover checklist when an opportunity is won, subject to the agreed process.
- Notify the relevant coordinator when required order-handover fields are complete.

Management dashboards

Report	Question it helps answer
Lead source performance	Which channels produce qualified furniture projects?
Pipeline by stage	What value and volume of opportunities sit at each stage?
Quotation follow-up	Which quotations need a response or have passed their follow-up date?
Opportunity ageing	Which projects have stalled and need a decision or updated next step?
Won/lost analysis	Why are projects won or lost, and what patterns should inform future qualification?

REPORTING DISCIPLINE

Keep stage definitions and quotation statuses consistent. Report actual conversion and timing only after the relevant data has been validated.

04 | Implementation roadmap and expected outcomes

A phased rollout helps the manufacturer validate the sales process before linking it to operational workflows. This reduces the risk of passing incomplete specifications or unapproved commercial details downstream.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review enquiry journey, products, quote process, user roles, apps, data sources and objectives.	Approved requirements and scope
2. Design	Define CRM fields, opportunity stages, specification handover, security and reporting.	Process and data design
3. Configure	Set up Odoo CRM, views, activities, pipeline and agreed workflow rules.	Configured test environment
4. Connect & migrate	Clean data, test imports and connect approved Odoo apps or external tools within scope.	Validated records and integrations
5. Test & train	Test lead routing, quote follow-ups, revision tracking, permissions and handover scenarios.	User acceptance sign-off
6. Launch & optimize	Go live, support users, review adoption and refine the workflow from feedback.	Live CRM and improvement backlog

Expected business benefits

- A shared view of customer enquiries, project requirements and sales conversations.
- More consistent qualification and follow-up of leads and quotations.
- Clearer visibility into project stage, expected value and next actions.
- Reduced risk of missed handovers caused by incomplete commercial information.
- Better coordination with Odoo Sales or operational apps when included and configured.
- A scalable starting point for connecting CRM with the manufacturer's wider business systems.

How outcomes should be reviewed

Review performance at 30, 60 and 90 days after launch. Compare response times, overdue quotations, data completeness, stage ageing, quote-to-order conversion and user adoption with the agreed baseline. Use staff feedback and validated CRM data to refine the process.

Why Liyan IT Solution

Liyan IT Solution supports CRM implementation, customization, workflow automation, data migration, integration and ongoing technical support. For this scenario, the focus is on creating a practical sales process and ensuring that customer and project information reaches the right team at the right time.

LET'S DISCUSS YOUR ODOO CRM REQUIREMENTS

Share your sales process, quotation workflow, current tools and operational handover needs. Liyan IT Solution can help define an Odoo CRM solution that fits your requirements.

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