

WHITE PAPER



# Odoo Open ERP Empowers CRM Best Practices for Real-Time Customer Insights





Customer Relationship Management (CRM) is the key to quality delivery of services, and successful, profitable engagements. Business leaders require real-time customer insights to ensure services are performed, and delivered efficiently and effectively.

Reliable stakeholder and customer satisfaction can be scaled and assured, time after time, with Open ERP-driven CRM best practices powered by USA Odoo.

As a top Odoo open source software integrator in the US, USA Odoo provides enterprise Odoo integration customers with a unique combination of open source business process consulting and turnkey implementation. USA Odoo provides Odoo-powered open source accounting, CRM, e-commerce platform, and logistic integration including real-time big data and business process improvements leading the way.

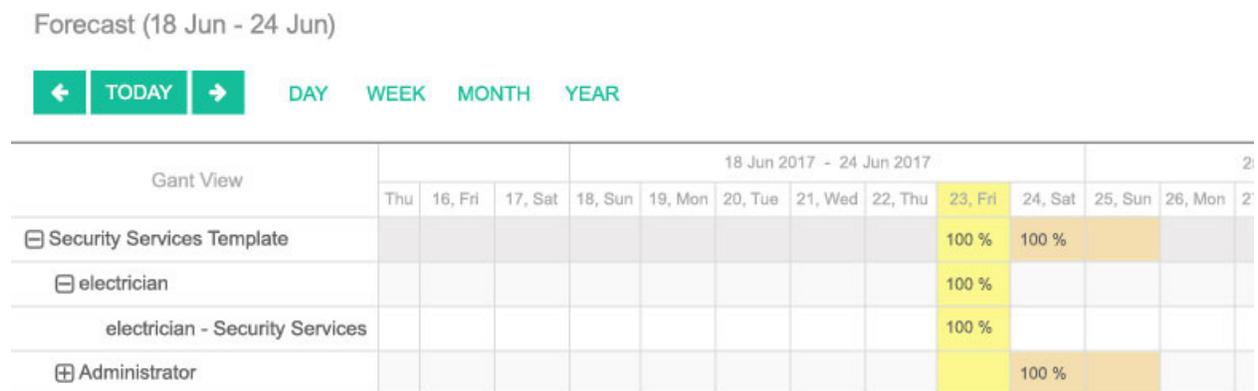
Open ERP implementations transform customers' needs, wants, desires, and behaviors into amazing customer experiences by unleashing the power of data. Connecting sales, manufacturing, and product development helps companies and their customers gain new and relevant business insights with highly advanced yet user-friendly Open ERP software.

For some time, CRM systems have been able to offer simple features such as:

- + Searches for customers by name, address, telephone, and email
- + Custom views and reports of customers
- + Notes, email and chatter, as well as payment information
- + Job and project histories
- + Plans for recurring or new jobs, projects or deliveries
- + Customizable fields, such as alternate addresses, DUNS number, building size, or birthdays

What is new to the Services industry is the ability to better tailor the delivery of services to customers, while increasing efficiency and scaling with harmony.

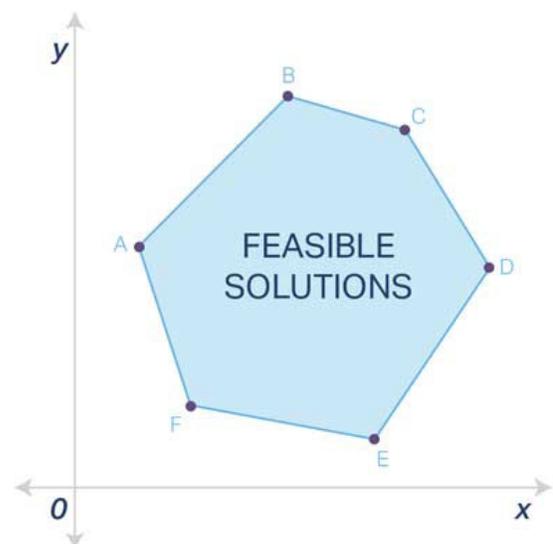
Open Source Integrators' staff has extensive experience in delivering this promise. The key is a powerfully integrated system that manages internal schedules and delivery promises, as well as enables customers to track their own status of customer activities.



### **This interactive scheduling system allows companies to dynamically schedule the delivery of services workload.**

Propelling this dynamic scheduling are powerful tools to more efficiently manage the services part of the business, and create cost saving and higher satisfaction. Open Source Integrators uses sophisticated algorithms to optimizing the multiple variables towards a "feasible zone."

This solution would allow manual overrides of the suggested scheduling, but provides cost savings and higher utilization and customer satisfaction. In short, we believe this will help your business grow.





## USA Odoo's solution offers:

- + Scheduling—Suggest a plan each day for the services staff, proactively looking for efficiencies in skills and job sites. Visual editor allows a calendar view of the services and sales staff, drag and drop corrections, and immediate corrections.
- + Time Management of employees—to track resources and create alerts if future work is in jeopardy of starting late.
- + Mobile access—Device agnostic/browser based?
- + Collaboration and communication with home office and customer.
- + Capacity planning—How much work your delivery team can handle at any given moment while being able to focus field resources on the most business-critical tasks.
- + Forecasting—predictive planning to schedule subcontractors more effectively, and improve customer costs.
- + Routing—Ensure that the right mobile employee—with the right skills and equipment—is assigned to the right job, every time. Smart Location services.
- + View and compare actual routes against predicted routes. Maintain the integrity of appointment data. And log trips for expense purposes and measure costs per job site.
- + Self-service scheduling, through a user portal.

Finally, your data, talent, and resources can be deployed to drive your bottom line. At Open Source Integrators, our highly skilled Open ERP experts are focused on finding and configuring your unique competitive advantage to harness your full potential. You're in the right place to begin the journey of creating and maintaining a world-class ERP system and getting the right team involved to enable you to exceed customer expectations.



## About USA Odoo

As a top Odoo open source software integrator in the US, USA Odoo provides enterprise Odoo integration customers with a unique combination of open source business process consulting and turnkey implementation. As an Odoo Gold partner, we help your enterprise synchronize and integrate manufacturing as well as e-commerce, including the aggregation of processes and decentralized and/or independent systems. Our veteran team of Odoo ERP consultants works hands on with your team to help drive your ability to connect your organization end to end with accounting, customer, and big-data-driven centrality.

USA Odoo was created to provide Odoo-powered open source accounting, CRM, e-commerce platform, and logistic integration including real-time big data and business process improvements leading the way. Our Odoo open source software consultants work personally with each of our clients to analyze the challenges facing their operations, unleash the power of their data, and achieve their specific competitive advantage and ROI business goals.

For greater insight into the power of Open ERP, read the entirety of [“Open ERP for Accounting and Financial Management, Release 1.0.”](#)

We invite you to continue exploring the pages of [USA Odoo](#) and [Open Source Integrators](#) to see what we mean about “Open Source Done Right” and how we can help your company scale with harmony.



usa  
odoo.com

### Contact us



[opensourceintegrators.com](https://opensourceintegrators.com)



[contact@opensourceintegrators.com](mailto:contact@opensourceintegrators.com)



1.855.877.2377