An E-Commerce Success Story:
The Power to Transform and Customize
with Odoo Open ERP

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USA Odoo meets change makers regularly who create "Blue Ocean" opportunities where others didn't see the potential. One such company saw the opportunity to transform Services into a packaged but customizable product and sell these products as a valued "add on" to substantial transactions. The visionaries behind this approach are now utilizing multiple sales channels to provide high-value services and products in their market using inside and outside sales teams, channel partners, and e-commerce

Flipping the E-Commerce Process on its Head

For this market, the sales process requires a reversal of the traditional e-commerce solution. In conventional systems, a customer would visit a website and purchase products or services. The e-commerce site would then transfer customer address and financial transaction information to the Open ERP system during the checkout process.

Our customer's process with USA Odoo is the opposite of this model. Here, a lead is generated on the ERP side and a sales exper is automatically transferred from the ERP lead generation and quotation process to the website.

On the e-commerce site, the salesperson can now select the products s/he discussed with the customer. This can be done via mobile tablet or from the office after the customer visit. During check-out, all customer information is available from the master ERP records. Once the e-commerce selection and purchasing process is complete, the sales representative can continue on the ERP system to schedule installation appointments, and more.

Complex Product Selection

Allowing the sales representative to drive the website selection protects the customer from selecting incompatible products or missing selection of critical components that would lead to a delivery nightmare.

For this particular market, the channel partners have agreements that restrict them to certain product lines or offerings. Within

these restrictions, every customer can have a number of upgrades or special offers that result in a specific set of products and Bill of Materials that is unique for their needs. This requires an order management system that permits only selection of allowable or compatible products on the e-commerce website.

Configurable Products

USA Odoo implemented the concept of configurable products. Here, an administrator can set up certain products that can be selected on the website. A configurable product will have several options that the user can select via radio buttons. Within each option, there may be further sub-categories from which to select.
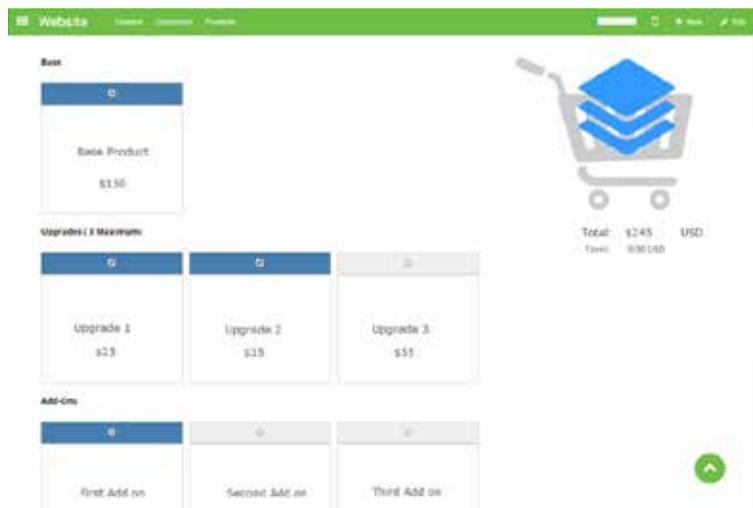
When a customer selects the unique configuration on the website, they can customize a product purchase with very few clicks to get exactly what they need. Odoo E-Commerce converts a complex purchase decision into a simple-to-use process.

Deliver And Install

Prepare BOMs

Configure Product
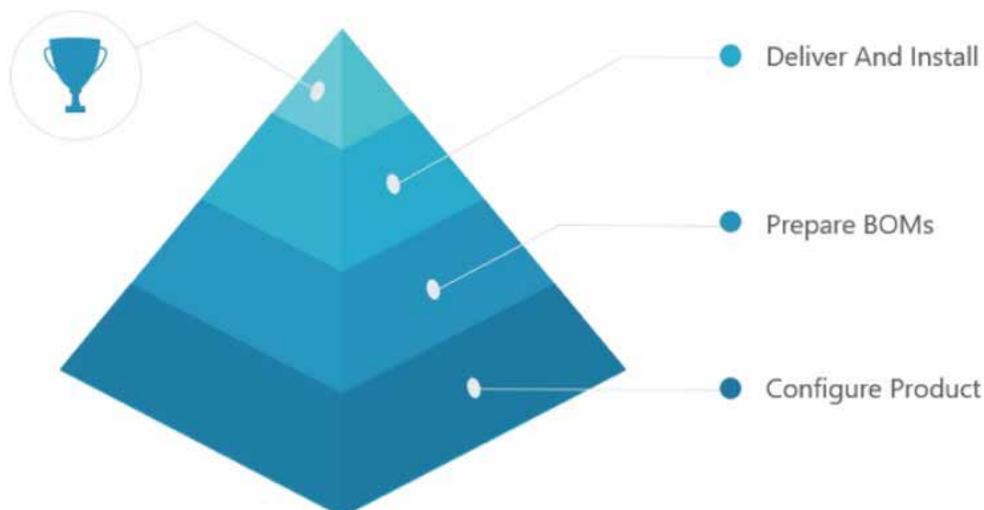
E-Commerce Triggers Task Creation

When a sales order is confirmed, a number of automated tasks are created.

1. A project will be created for the site using the customer's address as designator. For each product, one or more tasks may be created based on the packages selected.

2. Initial onsite inspections and installation services are scheduled and completed. End customers receive courtesy calls and view their orders through an Odoo portal. Managers use USA Odoo's specialized scheduling, dispatching and material issue tools to manage these projects, which allows for flexible yet efficient scheduling of the tasks.

3. Delivery Orders: The Odoo system issues materials through Delivery Orders for each of configured products. This includes subcomponents down to the BOM-level and customizable products.

On the day prior to install, a picking wave is created for each technician so they can collect all necessary components for their site locations on the morning of their scheduled install date. USA Odoo's forecasting system is optimized for lean inventory, and a small logistics footprint.

What does this mean to our client?

USA Odoo's work has enabled the customer to convert a very complicated sales procedure into a sales and service process that provides quality delivery of both services and products.The installed system reduces labor costs through better utilization and scheduling as well as inventory costs by using lean, just-in-time forecasting. The Odoo system also reduces the amount of mistakes and makes a technician's job easier while greatly increasing customer satisfaction. As a result, USA Odoo has helped our customer optimize their business, and create a platform for market expansion and growth in their unique, "Blue Ocean" ecosystem.

Taking E-Commerce to the Next Level with USA Odoo

E-Commerce at the next level starts with a robust CMS or platform solution scaled to your company's needs. With the right integrator, Odoo ERP helps deliver exactly what your customers want, quickly and efficiently. Improve your Time-to-Market with accounting-centric Odoo Open Source ERP solutions that extend and optimize your e-commerce platform.

USA Odoo was created to provide an Odoo-powered open source e-commerce platform along with accounting, CRM, and logistic integration that includes real-time big data and business process improvements leading the way. Odoo integration customers are provided with a unique combination of open source business process consulting and turnkey implementation.

USA Odoo, a division of Open Source Integrators (OSI), provides decades of experience in e-commerce business solutions customized to a wide range of industries, from Manufacturing to Construction and Utilities, Direct to Consumer, Engineering-Centric, and the Service Sector. From small, independent entrepreneurs with a big idea to national infrastructure efforts, you can rely on the scalable ERP expertise from USA Odoo around the clock.

Contact us when you're ready to write your success story,