

## Odoo Sales Application

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**Owner/Department:** Sales

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**Reviewed By:** Carla Skuhrovec

## Purpose

This SOP defines the required process for creating Quotes, generating Sales Orders, and executing customer agreements using Odoo Sign. The purpose of this SOP is to ensure pricing accuracy, contractual consistency, clean operational handoff, and reliable revenue reporting.

Quotes and signed documents represent formal commercial commitments. Incomplete or inaccurate execution introduces financial risk, operational delays, and customer confusion. This SOP ensures Sales follows a consistent, auditable workflow from proposal through signature.

## Use Case

This SOP applies to all users responsible for quoting, contracting, and closing deals in Odoo. It covers:

- Creating and managing Quotes
- Using Quote Templates for consistency
- Sending Quotes to customers & when not to send
- Using Odoo Sign for contract/SOW/PSA execution
- Converting Quotes to Sales Orders
- Understanding Sales responsibility before and after signature

This SOP does **not** cover:

- Product pricing governance or margin approvals
- Billing setup or invoicing
- Project delivery or service implementation
- Fulfillment or delivery order creation

# Systems, Tools & Templates

- Odoo Sales
- Odoo Products
- Odoo Sign
- Quote Templates (if configured)

## Step-by-Step Procedure

### 1. Preconditions for Quoting

Before creating a Quote, Sales must ensure:

- A valid **Opportunity** exists and is properly qualified
- The Opportunity is linked to a complete **Company Contact**
- Required Contact fields are populated (Name, Email, Address, Salesperson)
- Pricing and scope have been discussed with the customer
- Sales has all completed unexpired applicable PSAs and/or Supplier/OEM/Distribution quotes in hand
- Any required internal approvals (discounts, terms, etc.) have been obtained

**Quotes should not be created for unqualified or speculative deals.**

### 2. Creating a Quote

1. Navigate to the **Opportunity**
2. **Ensure that the opportunity is moved to the proposal stage.**
3. Click **New Quotation**
4. Confirm the following fields are correct:
  - a. **Customer** (Company Contact)
  - b. **Salesperson** (should auto-populate)
  - c. **Expiration Date** (quote validity period)
  - d. **Payment Terms** (if applicable)
5. Add applicable **Products** or **Services** using the Order Lines section
6. For each line item, verify:
  - a. Product or Service description
  - b. Quantity
  - c. Unit Price
  - d. Taxes (if applicable)
  - e. Discounts (if approved)
  - f. Every single product line **MUST** have analytic distribution completed
    - i. Customer attribution = client
    - ii. Revenue Stream = Channel/Direct partnership or Symplicity

7. Use **Sections** to organize line items if the quote is complex

Sales is responsible for ensuring the Quote accurately reflects what was discussed with the customer.

If the quotation is for resale of hardware or Symplicity originated products/services:

- Click send on quote, verify document format, add recipient, add any additional stakeholders, edit email body content if applicable and send the quote.
- Once the client has committed to moving forward, they can sign/accept the quote. This confirms the sales order on our end.
- Once payment processing is set up they will be able to make payments directly through the quotation link.
- We can also manually confirm the quote on our end by clicking confirm in the quotation. This will also generate the sales order.
- If a sales order is generated manually you will need to provide a copy of the order confirmation to the customer.

If the quotation is for Supplier products/services (on supplier paper)

- DO NOT click send on the quotation as you will be providing the supplier quote to the customer
- Once the quote has been accepted and signature has been received on the supplier contract click confirm to manual process the quote and generate the sales order.
- The quote should match 1:1 your supplier quote.

### 3. Customer-Facing Quote Determination

Before sending any Quote, Sales must determine **which entity's paper governs the commercial agreement**.

This determination defines whether the Odoo Quote is customer-facing or internal-only.

#### A. Symplicity-Originated Quotes (Symplicity Paper)

Symplicity-originated Quotes are used when **Symplicity is the contracting and billing entity**.

In this scenario:

- The Odoo Quote **is the customer-facing commercial document**
- Pricing, terms, and structure are controlled by Symplicity
- The customer accepts or signs the Odoo-generated document

#### Process:

- Review the Quote for accuracy and presentation
- Send the Quote to the customer directly from Odoo
- Customer acceptance or signature authorizes confirmation

- Confirming the Quote generates the Sales Order in Odoo

## B. Supplier-Originated Quotes (Supplier Paper)

Supplier-originated Quotes are used when **the supplier, OEM, or distributor is the contracting entity**.

In this scenario:

- The supplier document is the **customer-facing commercial agreement**
- Symplicity does not control pricing, terms, or document structure
- The Odoo Quote exists **only as an internal system of record**

### Process:

- The Odoo Quote must match the supplier quote **exactly (1:1)**
- The Odoo Quote must **not** be sent to the customer
- The supplier document is provided directly to the customer
- Once supplier acceptance and signature are received:
  - Sales manually confirms the Odoo Quote
  - A Sales Order is generated for internal tracking and downstream processing

Sending the incorrect document to a customer creates legal, financial, and reputational risk.

## 4. Reviewing Quotes Prior to Sending

Before any Quote is sent or confirmed, Sales must:

- Review all line items for accuracy
- Confirm the correct customer entity is selected
- Validate pricing, quantities, and scope
- Confirm internal approvals are complete
- Review customer-facing presentation
- Confirm analytic distributions are complete

Odoo must remain the system of record for all quotations and proposals.

## 5. Quote to Sales Order Conversion. See above for critical context in these steps

Once a Quote is accepted or signed:

1. Confirm the Quote to create a Sales Order
2. Click **Confirm** or **Confirm Order**
3. Odoo automatically converts the Quote into a **Sales Order**
4. The Sales Order becomes the official record for fulfillment, invoicing, and delivery

**Important:**

- Confirm all details before confirmation
- Confirmed Sales Orders cannot be easily modified without approval
- Signed documents should be attached automatically if using Odoo Sign

## 6. Post-Signature Responsibilities (Sales)

Once a document is signed and the Sales Order is confirmed:

- Verify the signed document is attached in Odoo
- Update the Opportunity stage to **Won** or appropriate closed stage
- Notify internal stakeholders as required (Operations, Delivery, Finance)
  - Most products that requires internal operational implementation/pro services will auto trigger the creation of the project template.
  - For one-offs that do not these need to be tagged to the Director of Ops for creation/assignment once the sale is confirmed.
- Complete any required handoff notes, documentation, and schedule the handoff call once the Dept Lead of Pro Services assigns a PM and/or implementor

Sales responsibility concludes once:

- The contract is signed
- The Sales Order is confirmed
- The Opportunity is marked as Won
- Handoff to Operations or Service is complete

**Sales should not:**

- Modify confirmed Sales Orders without approval
- Create or modify Delivery Orders
- Create or modify Invoices
- Commit to delivery timelines without consulting Operations

## 7. Orders, Handoff, and CRM Accuracy

- Confirmed Sales Orders trigger downstream workflows
- Clean data ensures smooth handoff to Operations
- Address discrepancies between verbal agreements and the Quote **before** confirmation
- Use **Internal Notes** on the Sales Order for special handling instructions

Sales must not modify confirmed Sales Orders or signed documents without leadership approval.

## 8. Handling Quote Revisions

If a customer requests changes after a Quote has been sent:

1. Duplicate the existing Quote to create a new version
2. Apply required changes
3. Update the Expiration Date if needed
4. Send the revised Quote to the customer
5. Archive the original Quote

**Do not modify a Quote after sending without creating a new version.**

## Best Practices

- One Quote per defined scope
  - All PSA opportunities/quotes need to be separate opps/quotes/sales orders from Supplier orders
- Keep product and service descriptions clear and customer-readable – Do not edit products. This would need to be a support ticket request for a change.
- Do not bypass Odoo Sign for contracts requiring signature
- Store all signed documents in Odoo in the contracts folder under the client
- Review anything customer-facing ~~presentation~~ before sending
- Escalate to Director of Ops if custom addons or out of scope products need to be created
  - This should be the exception, not the norm.
- Document special terms (Including PSA T&C) in the Quote Terms & Conditions section

# Exceptions & Escalations

Any uncertainty regarding:

- Quote accuracy or pricing
- Contract execution or legal terms
- Signature requirements or approvals
- Post-confirmation modifications

should be escalated to:

- Director of Operations

# Related Policies or SOPs

- SOP – Sales – CRM & Contacts Management
- SOP – Sales – Opportunity Lifecycle & Activities
- SOP – Operations – Order Fulfillment (if applicable)
- SOP – Finance – Invoicing & Revenue Recognition (if applicable)

# Version Control

Version	Date	Author	Summary of Changes
1.0	01/04/2025	Nick S.	Initial creation
1.1	01/04/2025	Nick S.	Added quote-to-order conversion, templates, optional products, and revision handling
1.2	01/06/2025	Carla S.	Redline review w/ redactions and additions