



# Onboarding process : how to enhance user experience

Usability Team

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# Introduction



# INTRODUCTION

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- ONBOARDING : the first minutes a user spend on your software.

“You only get one chance to make a first impression”

- How to improve your onboarding process ?
  - Use your COMMON SENSE :
    - Stick to the business needs
    - First, design your module according to the needs
    - Then think technically
    - Focus on the user experience
  - User should not waste time discover it but immediatly be able to create documents
    - What the user see should look like what he does everyday
    - For example, an on-screen sale order should look like the paper one
  - Check what can go wrong in your process and improve it

The screenshot shows the Odoo CRM interface. The top navigation bar includes 'Messaging', 'Sales', 'Reporting', and 'Settings'. The left sidebar lists menu items: 'Sales' (with 'Customers' highlighted), 'Leads', 'Opportunities', 'Phone Calls' (with 'Logged Calls' below it), and 'Tools' (with 'Deduplicate Contacts' below it). The main content area is titled 'Customers' and features a 'Create' button. A search bar at the top right contains 'Customers x'. A blue arrow points to the 'Create' button with the text 'Click to add a contact in your address book.' Below this, a paragraph states: 'Odoo helps you easily track all activities related to a customer; discussions, history of business opportunities, documents, etc.'

Annotations with red arrows and text:

- An arrow points from the text 'CRM related menu entries should be under CRM, not Sales' to the 'Customers' menu item in the sidebar.
- An arrow points from the text 'Leads are only used by large companies, by default, it should not be enabled' to the 'Leads' menu item in the sidebar.
- An arrow points from the text 'Why is this tool in a specific menu ? It is related to the customers' to the 'Deduplicate Contacts' menu item in the sidebar.

A red-bordered box at the bottom contains the text: 'For the first screen, user wants to see the Opportunity Pipeline, not an empty list of customers'

Opportunities Pipeline

Search...

CREATE













New







Qualification







Proposition





Negotiation





  
WON (0)

  
LOST (0)

  
ADD NEW COLUMN



# INTRODUCTION

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How to improve your onboarding process ?

Use our onboarding tools !



# Popup tips & Tours



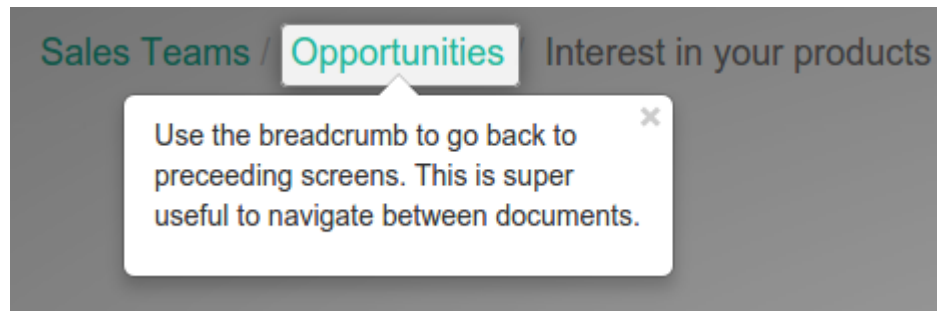
Little tips to help people going through odoo and the process they want to explore

- Breathing bubble that catches the eye



Sales Teams / Opportunities / Interest in your products

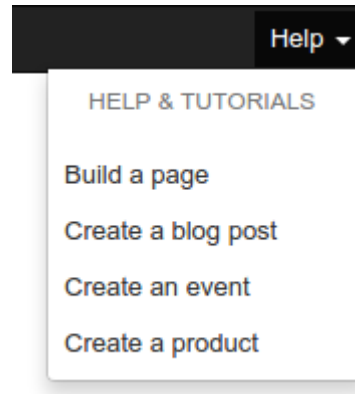
- When the user clicks on it, the explanation pops out



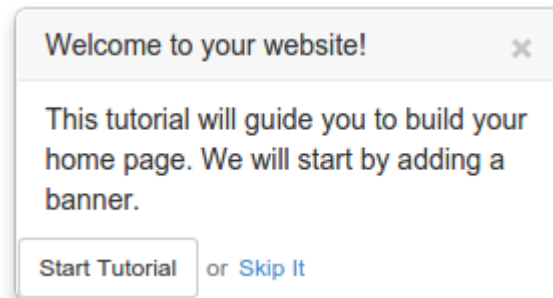
- Short empathic sentences, focus on the interface element.
- Triggered for each users individually
- Not a tour !
- Should be used only if you cannot improve usability or to explain some basic concepts
  - For example : the breadcrumb, the chatter, how to use the kanban view

Tours are available on the front end interface

- Help menu available when you are a front-end admin



- These are tutorials explaining step-by-step what to do

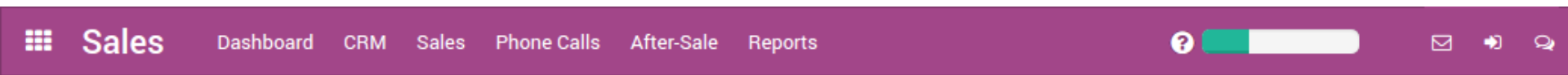




# Implementation Guide

Tool to help the businessman starting his business with Odoo

- Focused on the business requirements
- Odoo is a tool to help companies to grow. The planner will help configuring Odoo to stick to the user business.



- Long process that can take months to finish, it's not a one shot tool
- The businessman can open it anytime he wants

Welcome

GOALS

Your Expectations

Your KPIs

SALE FLOW

Your Pipeline

Your Customization

Your Proposals

Import Products

LEAD ACQUISITION

Incoming Emails

DEPLOYMENT

Reporting

Your Users

GROW REVENUES

Weekly Meeting

Sales Tools

Boost Leads

# Your expectations

## CRM Planner

What are your sales objectives? What challenges are you dealing with? Being clear on your expectations is the first step of a successful implementation.

	Sales Objectives By Priority: ?
#1	
#2	
#3	
#4	



Once you have finished the implementation, your expectations should be met.  
If not, our CRM experts are available to help you achieve your goals.

☐ Mark As Done

Next step >



# App Dashboard

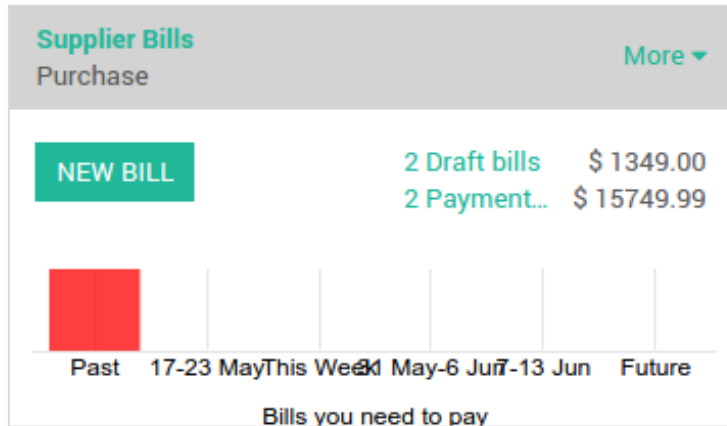
## First screen of the app

- It's the gateway to each application functionalities
  - It's instinctive. First time you see it, you know where you need to click
  - You can directly access to all your documents
  - In a glance, you know what are the the actions that need to be done
- Everything you need on one screen
- Better integration with the new design
- Gain of time : no need to navigate through the menus



# App dashboards

## Accounting



**Supplier Bills** More ▾  
Purchase

View	New	Reports
Bills & Refunds	Bill	Bills Analysis
Payments Mat...	Refund Bill	Aged Payables
★		Settings

## Human Resources



**Management** More ▾  
YourCompany

To Do	To Approve	Reports
0 New Applica...	0 Timesheets	Recruitments
0 Interview Re...	0 Expenses	Expenses
1 Appraisal to ...	1 Leave Reque...	Appraisals
	1 Allocation Re...	Timesheets
		Leaves
		Attendances
		Settings





# Tooltips, Menu tips & Placeholders

- Menu tips
  - It guides the user when the screen is empty
  - It explains how Odoo can help him managing his business

## Opportunities

CREATE

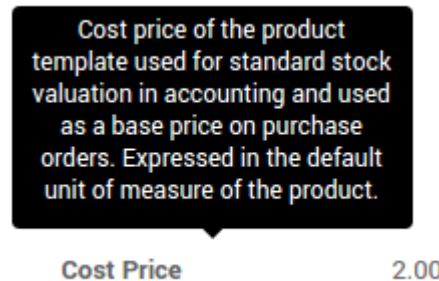
**Click here to add new opportunity**

Odoo helps you keep track of your sales pipeline to follow up potential sales and better forecast your future revenues.

You will be able to plan meetings and phone calls from opportunities, convert them into quotations, attach related documents, track all discussions, and much more.

- Tooltips

- Are used to explain a field
- When you hover a field, you expect to get an explanation



- Placeholders

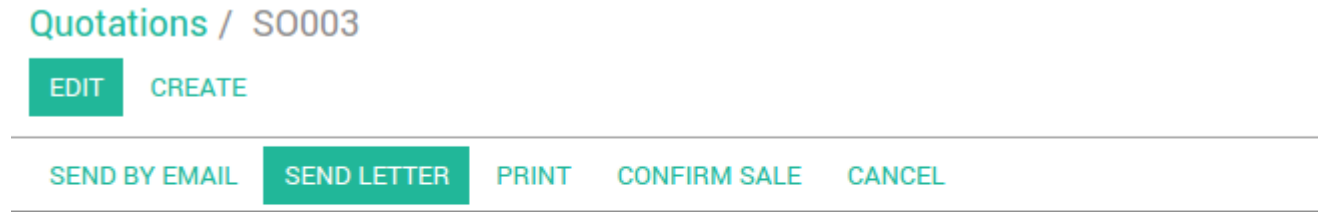
- Simple way to indicate what to type in the field

Task summary...

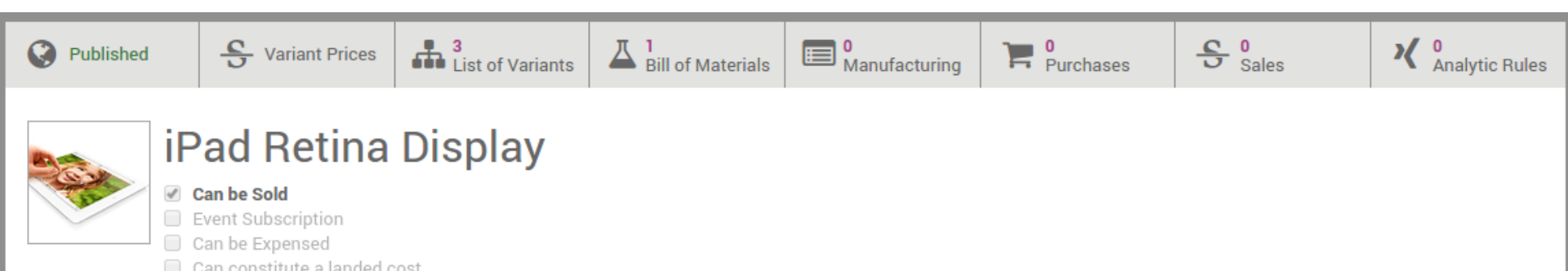
Project	The Jackson Group's Project
Contract Status	In Progress
Assigned to	Administrator

# Action & Stat Buttons

- Action button :
  - Guide the user through the process
  - Highlights the next step



- Stat button :
  - Quickly go to the linked documents
  - Use the breadcrumb to go back and go on in your process

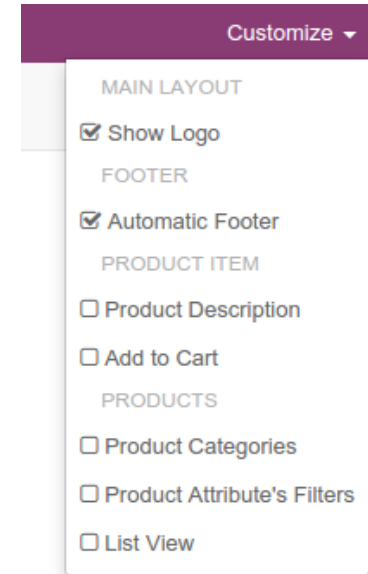




# Settings & Customizing

For the first use, focus only on the primary process

- If you want to add a small feature linked to the application, go to customize
- Same thing as we did for the website but in the backend

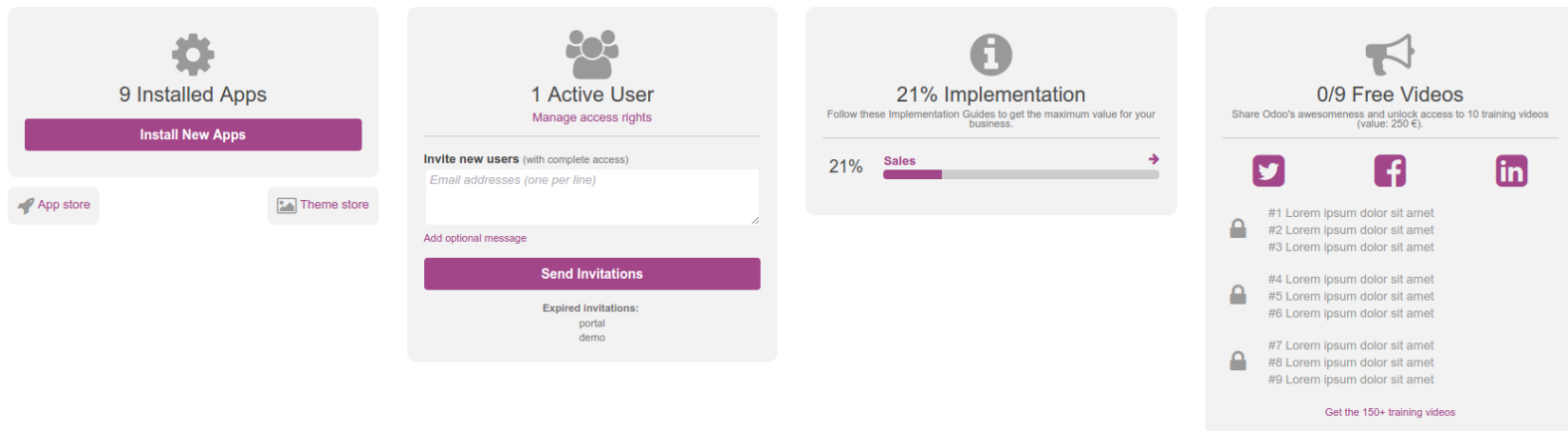


If you need to advanced configuration go to the settings

- Settings have been simplified and are now in each apps



- New dashboard to centralize the main configuration information








# Onboarding Mails



# Onboarding emails

e-Mail sent after a few days to our SaaS users (administrators)

- A few tips and tricks
- What are the features available to make the experience more awesome
- How to get help
  
- Based on templates : you can copy the behavior for your own modules

Auto Login

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**Hooray !**

Your Odoo CRM application is up and running

**What's next?**

- Try creating a lead by sending an email to [sales@mycompany.com](mailto:sales@mycompany.com)
- Track your opportunities in your sale funnel by simply dragging and dropping the cards from one column to another

**Discover the CRM planner** to activate extra features (10% done)

- Automatically assign your leads to your salesmen with the lead scoring,
- Keep in touch with your potential client with efficient email campaigns,
- Gain high quality insight from surveys,
- Get smart reporting and accurate dashboards,
- And much more...

**Need Help?** *You're not alone*

We would be delighted to assist you along the way. Contact us and we will be happy to help you:

- By Mail: [help@odoo.com](mailto:help@odoo.com)
- Reach us through the [Live Chat in Odoo](#)

Enjoy your Odoo experience,

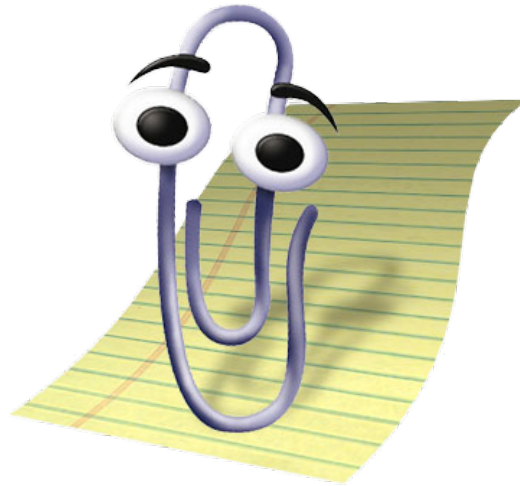
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The Odoo Team

PS: people love Odoo, check [what they say about it](#).

# Conclusion

- Never break the user flow
- It has to be natural, use your common sense
- If needed, guide the user without being invasive



Don't be that guy !