

Customer Concierge Training

Module: Odoo Basic Overview

Subject: Smart buttons/Moving Pipelines

Trainer: Cheryl Day

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How To: The Smart Buttons are located at the top center inside the opportunity.



NEW indicates the Opp has just been created and it has not moved through the phases yet.

CAM indicates the information and files in the Opp are being reviewed by Quote engineering.

QUOTE indicates that our quoting team is working on the final quote. When it is ready the Customer Concierge (CC) will be notified by email or Odoo.

SENT indicates the CC has sent the quote to the customer. When the CC has sent the quote to the customer click the SENT smart button to indicate the action has been completed. This is the only Smart Button we interact with. A note will be added to the Chatter that it has been sent.

VERIFICATION indicates a PO has been received and an order has been acknowledged.

EQ indicated the files from the order are being reviewed in detail by engineering. Questions that arise will be relayed to the customer and the customer will clarify.

MORE under more is the **WON** smart Button. This indicates the order has been completed and we are awaiting delivery from the vendor.

