

Customer Concierge Training

Module: Odoo Basic Overview

Subject: Stars

Trainer: Juli Parent

Date of Training: 4/29/25

How To:

The 3 stars are to provide visual urgency throughout the process.
We utilize all 3 stars or none.

The 3 stars are to be selected in the following situations:

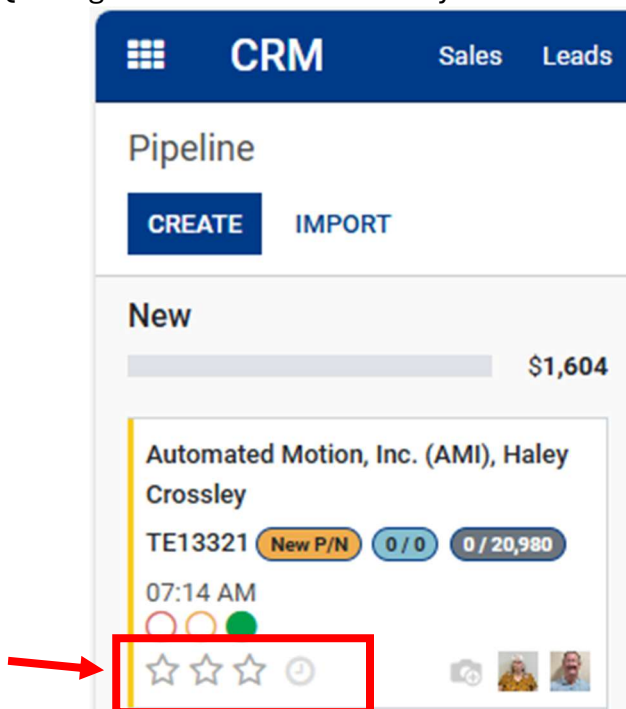
- Quote stage – RFQ w/ PO for a quick turn of 5 days or less
- Order acknowledgement stage – quick turn of 10 days or less
- Order acknowledgement stage – we have selected “follow lead-time”
- Order acknowledgement stage – when the delivery date is exactly the number of days in the lead time and there is no room for extra time

Here are areas where you can mark the stars:

- By clicking the third star to the right it will highlight all 3 stars for you.



Quoting: CRM Main screen after you have entered the opp.



Before or after you've entered the PO in the opp main screen

Pipeline / F10178373

EDIT CREATE Action

NEW QUOTATION RE-CAM MARK LOST ASSIGN TO ME NEW CAM QUOTE SENT VERIFICATION EQ MORE

6 Files and Doc... 0 Activities 0 Meeting 0 Quotations \$ 2,063.45 Sales Orders 1 RVQ's \$ 0.00 Purchase Ord... More

F10178373 / Rigid PCB

Priority ★★ ★
Sales Follow-up ☆ ☆ ☆
ITAR ☐
Send to Engineering Partners ☒
Re-Bid at acknowledgment ☐

After you've entered the PO from the Main CRM screen:

Verification

\$33,268

Fermi National Lab, Dakota Krokosz

F10178373 / Repeat w/ changes 1 / 0

0 / 2

● PO w/Multiple PNs ● Order Placed
● Verified ● ECO Made Approved

\$ 2,063.45 07:16 AM

★ ★ ★