Customer Concierge Training

Module: Odoo Basic Overview

Subject: Tabs – Mid Screen Tabs

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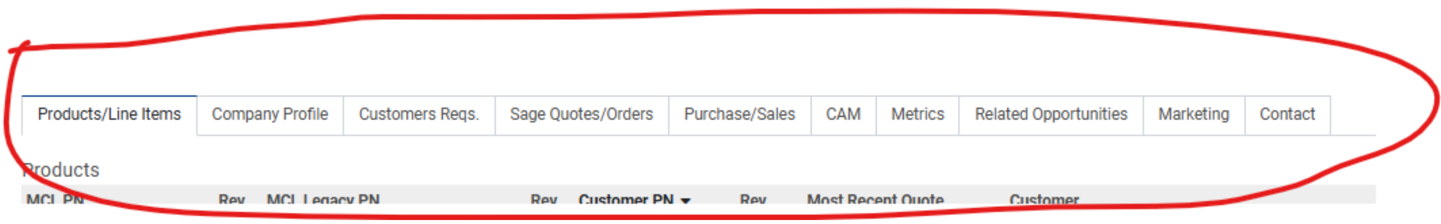
Date of Training: 4/22/2025

How To:

Tabs – found in the main opportunity screen, down halfway/mid-screen and is to find things you might need for yourself or your customer. Many tabs contain documents that you may need, your customer may request or other MCL staff will need to process the opportunity.



TABS

1. Products/Line Items – You will find the detail about the part in this tab. This tab will give you a snapshot of the details about the part itself. This snapshot will show you the size of the board and array, how many layers, material required, finish, soldermask color, silk screen color, etc. The current build files are held in this tab, and you may need them if you are doing a repeat part rfq and the customer sends files along with their email, you need to check to make sure the files are the same files that we currently have. You will also find the “production files” or “array files” here when your customer requests them.

2. Company Profile – This tab has information about the company at your fingertips. Information like Buyer’s notes. Other important details that can be found here are what classification the company is based on their potential revenue. You will also see a biography of the company.

3. Customer Reqs. – This is the area where you find the uploaded files you submitted during the quote stage along with your saved RFQ email. You can add files such as new gerber files, additional information like a fab drawing or array drawings under Customer Files. You will save confirmations from customers under the “Confirmation Emails” area. If you get a revised RFQ request, you will save the email (renamed) to the “RFQ emails” area to be saved. The “sales email” area is for items that we need to know about this part that may not pertain specifically to the part itself or the RFQ. To add files you will select Edit from the top of the screen and then drag and drop your files or emails to the appropriate areas, and select save at the top of the screen.

4. Saqe Quotes/Orders - This tab will contain the Sales Order Confirmation form that is sent to the customer once a PO is issued to the vendor. The Sales Order, or SO, will get sent directly to the customer from the Ops department. The SO will contain the customer's order information from their PO, the quantity, and delivery date(s).

5. Purchase/Sales - This tab contains information regarding purchase orders – vendor's and customer's. It will contain the physical copies of the vendor purchase order, vendor traveler/notes, and customer's purchase order and email. Information found here is the selected vendor, quoted vendors, customer order snapshot, etc.