

Customer Concierge Training

Module: Odoo Basic Overview

Subject: Tags

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Date of Training: 4/22/2025

How to:

Tags that are used to identify various aspects of the job that make it different than a normal opportunity or bring attention to a specific detail the next team needs to know. They help quoting to understand what the customer needs, Ops team understand what they need to let the vendor know on the order, engineering know about certain things like it needs to be domestically built, as a few examples. Some tags we add, and some tags other teams use.

There are various places to add tags to the opportunity.

Quote entry: we will flag for Quick turn quoting options, ITAR, China+1, RFQ w/PO, etc.

Create Opportunity

Customer Details

Action

☒ Company ☐ Individual

Customer

Create or choose company

Customer Contact

Customer Part Numbers

Part Number	Rev	RFQ Type	Type	Related Product	Changes	Qtys	Lead Times	Tags	Art
Add a line									

You can edit the opp if you forget one by opening the opp and clicking Edit at the top. Add the tag and select Save.

Pipeline / PCB-2003000-00/2

EDIT

CREATE

NEW QUOTATION

RE-CAM

MARK LOST

ASSIGN TO ME

ASSIGN CUSTOMER CONCIERGE

Potential Duplicates Opportunities

5 Files and Doc...

0 Activities

0 Meeting

PCB-2003000-00 / 2

Pipeline / PCB-2003000-00/2

SAVE

DISCARD

NEW QUOTATION

RE-CAM

MARK LOST

ASSIGN TO ME

ASSIGN CUSTOMER CONCIERGE

Potential Duplicates Opportunities

5 Files and Doc...

0 Activities

0 Meeting

1 Quotations

Customer Part Number
PCB-2003000-00

Opportunity State

Customer

SAGE ID

Business Type

Email

Phone

Opportunity Type

Product Type

Tags

Notes

○ ○ ○

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OEM

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▼

Repeat

▼

Rigid PCB

▼

✎

Review New Quote ✕

Unverified ✕

▼

Order Acknowledgement Screen: Here we might add a tag for Blanket order, Critical, PO w/multiple parts, assembly options, etc.

Acknowledge Order

Quote	Prod Type	MCL PN	Rev	Legacy PN	Rev	Cust PN	Rev	Sage Quote	PO No.	Tags	Artwork w/ PO	U/P	Waive NRE
<input type="checkbox"/>	Q041404-1	Rigid PCB	RB-284-3	1	CB-2LP-234-NH	PCB-2003000-00	2					0.890	<input type="checkbox"/>
<input type="checkbox"/>	Q041404-1	Rigid PCB	RB-284-3	1	CB-2LP-234-NH	PCB-2003000-00	2					0.850	<input type="checkbox"/>
<input type="checkbox"/>	Q041404-1	Rigid PCB	RB-284-3	1	CB-2LP-234-NH	PCB-2003000-00	2					0.750	<input type="checkbox"/>

TAGS WE UTILIZE

- **Quick Turn** – This is to alert operations and shipping that the job is urgent – Customer wants a turnaround of less than 10 days. This is used both when we submit a quote and when we enter an order acknowledgement.
- **Critical** – This means the job has a very tight turnaround and needs priority. Less than 5 days.
- **Domestic Only** – Customer just wants us to quote in the Unites States only. There are no formal restrictions on this, it is a customer preference for that quote/build.
- **ITAR** - Boards are not to be quoted, sent, engineered, nor built outside of US. Files are usually encrypted. Formally restricted and noted on drawings and files as such.
- **No China** – Customer does not want a quote from China but can be quoted overseas in other countries.
- **China+1** – Customer would like to see options outside of China.
- **IPC Class 3** – Used for higher technology boards that require higher standards for manufacturing. This is called out sometimes in the email but always on the fab drawing or in the files.
- **RFQ w/ PO**- Customer has sent along a PO with their request for quote.
- **PO w/ multiple PNs** – Customer’s PO has multiple part numbers on it. This is used during the order acknowledgement screen. It alerts each stage that there is more than one part number attached to this PO number.
- **Blanket Order** – This is used in order acknowledgement screen to tell Ops how the customer wants the total quantity broken out in releases.

- **Assembly – Turnkey** – This means that MCL is responsible for all items for assembly – PCB's, parts, and labor.
- **Assembly – Labor Only** – Just labor costs for assembly. The Customer is providing all the parts and boards.
- **Assembly – Mixed** – MCL and the customer are supplying items for the order. ex, MCL is providing the boards, 2 of the 10 parts, labor; and the customer is supplying the 8 remaining parts on the BOM needed to assemble the boards. Or MCL is providing the boards and labor and the customer is supplying all of the parts.
- **Gerber Generation** – We generate the gerbers files for the customer rather than them supplying them.
- **Large Order** – This note is added by quoting. This tag is added for any line on the quote that equals \$10,000 or more. This helps us identify the large order opportunities to follow up on.