

# Customer Concierge Training

**Module:** Odoo Basic Overview

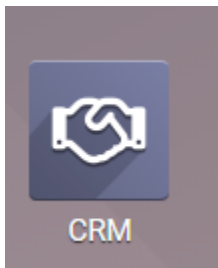
**Subject:** Odoo Pipelines

**Trainer:** Carla

**Date of Training:** 4/15/25

## How To:

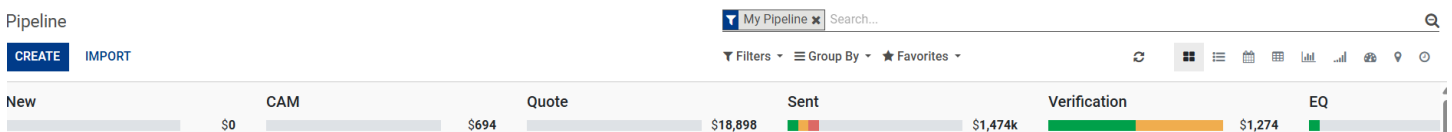
Pipelines are found in Odoo under the CRM. This is our main screen for all of our opportunities/jobs.



There are 7 Pipelines(Columns).

They are: New; CAM; Quote; Sent; Verification; EQ; and Won

Opportunities are created and then move from left to right through the different Pipelines. Like a reading train...woo woo! 🚂



**New** is where the newly created opportunity starts once we have the request entered from the customers. This is the waiting area for engineering.

**Cam** is when the quote engineering team reviews the files and enters the PCB specs into the system in preparation for vendor bidding.

**Quote** stage is where the quoting team does their bidding out for pricing and creation of the quote for the customers. When the opp's status has changed to green, that signals the quote is completed and are ready to be sent to the customer.

**Sent** is where the Concierge moves the opp to once the quote has been sent to the customer. Here it will stay until it is ordered or closed.

**Verification** is the stage where the opportunity moves to once the customer's purchase order has been processed and entered by the Concierge. Our Ops team will process the scrubbing of the order in this pipeline to prepare it for vendor order placing.

**EQ(Engineering Questions)** new orders that require the engineering process will stay here until after all questions answered by either the customer – and or Vendor.

**Won** is the last pipeline where the opp will remain once the order has been placed into the manufacturing process with the vendor and then shipped to the customer.

In this screen you will see every opportunity and where it is in the process. You also have the option to see only the accounts assigned to you by viewing “my pipeline”

To see your pipeline, click on “Filters” to bring up the dropdown options and choose “My Pipeline”.

