

Customer Concierge Training

Module: Odoo Basic Overview

Subject: Scheduling Activities

Trainer: Carla

Date of Training: 4/29/25

How To: There are several ways to Schedule an Activity.

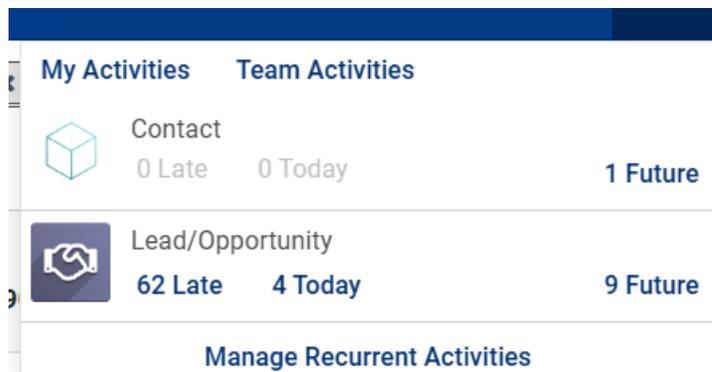
An activity is a reminder TO DO something: like call a customer, check status of a quote; follow up on trip reports etc... a sticky note, calendar, reminder.

1. To access your assigned activities:

In The CRM, in the upper right corner, there is a small clock:



When you click it, you can see My Activities, and Team Activities. You will have activities assigned to you in both areas.



	Late	Today	Future
Contact	0	0	1
Lead/Opportunity	62	4	9

[Manage Recurrent Activities](#)

There are 3 sections: **LATE**; **TODAY** and **FUTURE**

By clicking on today, you get a list of opportunities that are due on TODAY:

2,077

Creative Electronics & Software, Patti Stockwell
550-0026471 / A **New P/N** 0 / 0
0 / 0
● Large Order
\$ 595.95
○ ○ ○
★ ☆ ☆ ⌚

Youngtron, Inc., Stacey Bilger
CD0000-SP-273 / 1.7 **New P/N** 0 / 0
0 / 3
● Large Order
\$ 584.00
○ ○ ○
☆ ☆ ☆ ⌚

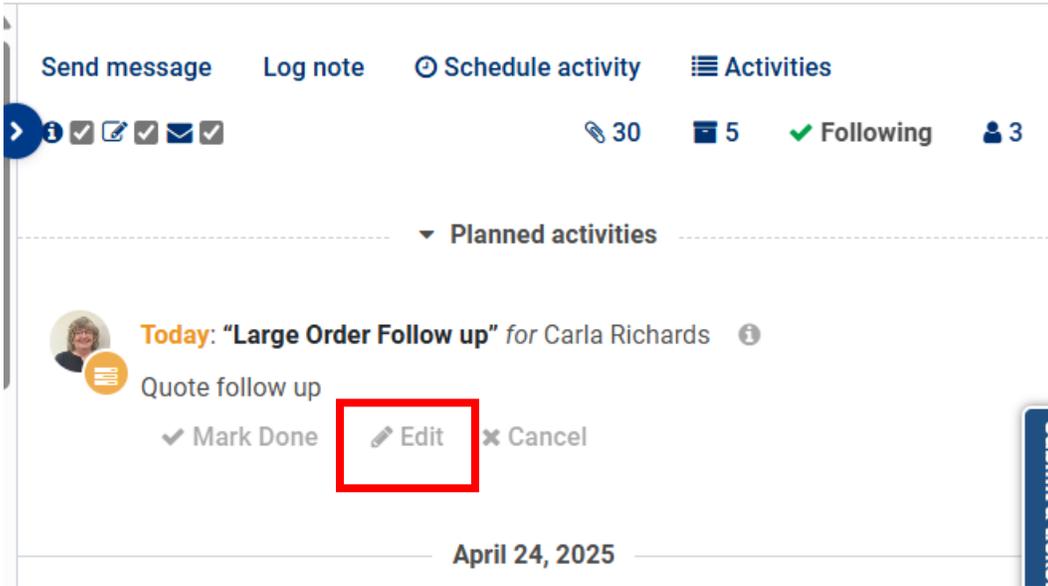
Assembly Technologies Inc., Daya Patoliya
167A.0100473_ISSJ / 00 **Repeat**
1 / 0 0 / 35
● Unverified ● Large Order
\$ 599.60 09:18 AM
○ ○ ○
☆ ☆ ☆ ⌚

Assembly Technologies Inc., Shivani Joshi
J7766140152_ISSB / 2 **Repeat** 0 / 0
0 / 2

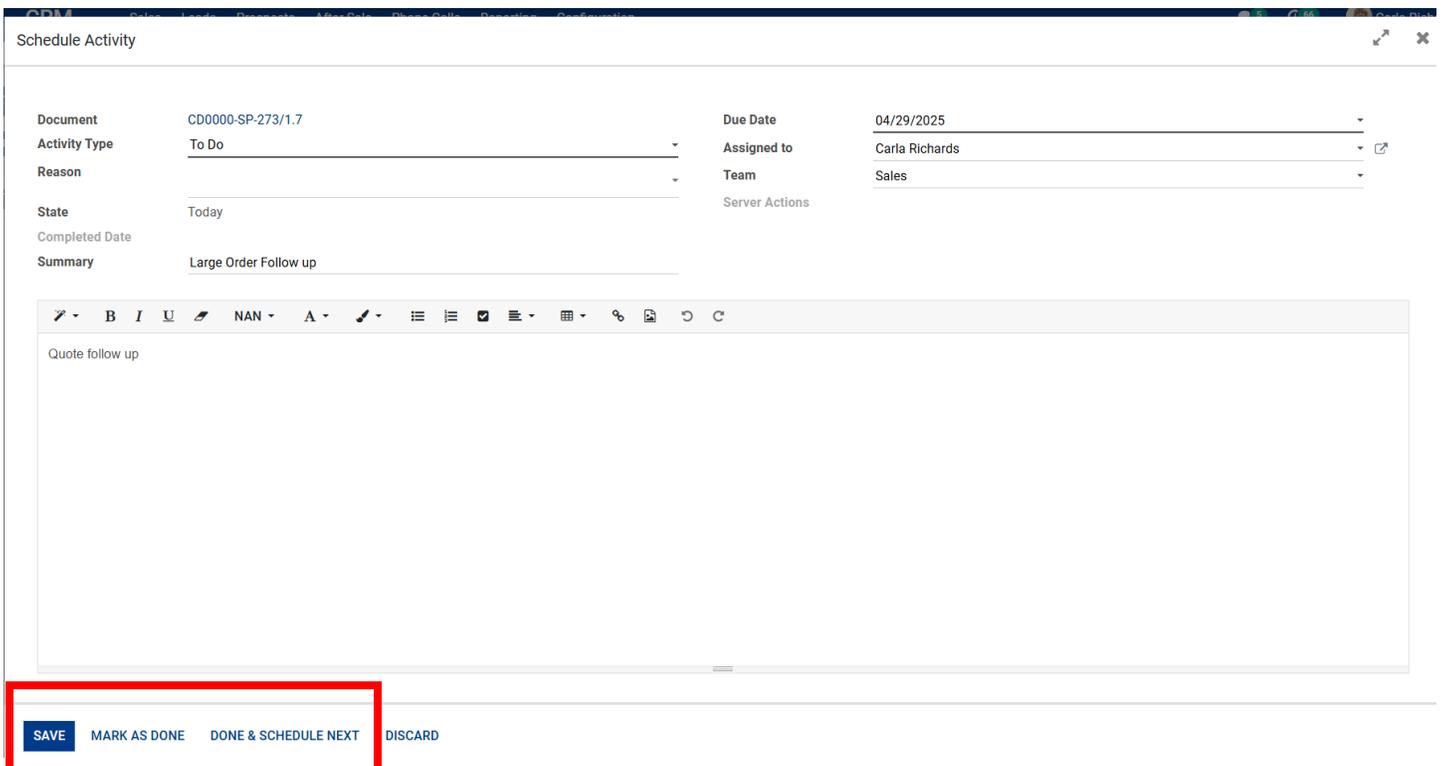
By clicking on LATE, you get a list of opportunities that are past due.

By clicking on FUTURE, you get a list of opportunities that are due at a later date.

When you open the OPP or contact screens, the ACTIVITY will appear on the right side in the CHATTER under Planned Activities. When you choose EDIT, it opens the activity for you to enter the information or notes.



If you need to follow up and schedule another, add a note for the future follow up in the body of the activity and select “Done & Schedule Next”. You can also adjust this activity by changing the due date field to a later date for follow up and select “SAVE”. If you’ve noted the activity and it is completed, you can “Mark as Done”. This will close and complete the activity.



2. When creating an activity from the beginning, You can do this from the company contact screen or a specific opp in the chatter areas.
- Under Contacts, it would be for the Company information or something to do with the company as a whole, ie. China Tariff discussion, Sales Meeting Folow Up, NPS follow up.
 - From the specific opp it would be something to be done for that specific part or order, ie. Large order follow up, to do, to call, schedule a meeting.



You must choose the following areas to be completed:

The 'Schedule Activity' form contains the following fields and values:

Document	CD0000-SP-273/1.7	Due Date	04/29/2025
Activity Type	To Do	Assigned to	Carla Richards
Reason		Team	Sales
State	Today	Server Actions	
Completed Date			
Summary	Large Order Follow up		

The text area contains the text: "Quote follow up".

At the bottom of the form, there are four buttons: 'SAVE', 'MARK AS DONE', 'DONE & SCHEDULE NEXT', and 'DISCARD'.

ACTIVITY TYPE (To do; Call; Meeting): select from the drop down options.

Search: Activity Type

Search...

▼ Filters ▾ ≡ Group By ▾ ★ Favorites ▾ ↻ 1-15

Name	Default Summary	Planned in	Unit	Type
+ To Do			5 days	after previous activity deadline
+ Email			0 days	after previous activity deadline
+ Call			2 days	after previous activity deadline
+ Meeting			0 days	after previous activity deadline
+ Website Visit	The customer has visited the MCL website		0 days	after validation date
+ Other			0 days	after previous activity deadline
+ Order Placing			0 days	after previous activity deadline
+ WIP Entry			1 days	after validation date
+ Scrubbing			0 days	after previous activity deadline
+ Adjustment			0 days	after previous activity deadline
+ Sales Meeting Action Item			0 days	after previous activity deadline
+ Prospecting	Add Prospecting Data Form		0 days	after previous activity deadline
+ Discovery			0 days	after previous activity deadline
+ New Customer Onboarding Action Item			1 days	after previous activity deadline
+ China Tariff Discussion			0 days	after previous activity deadline
+ NPS Follow Up			5 days	after previous activity deadline
+ Upload Document			5 days	after previous activity deadline

REASON - choose a reason code

Reason

State

Completed Date

Summary

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- Customer Onboarding - NDA
- Customer Onboarding - Terms and Conditions
- Customer Onboarding - New Customer Info Sheet
- Customer Loyalty Program
- Accounting
- Quality
- Quote - Follow-up
- Quote - Delivery
- RFQ
- PO
- Shipping / Receiving
- Account Management
- Growth
- Manufacturing

SUMMARY – a brief description of what is needed

DUE DATE - select an appropriate date for the activity to be completed.

Assigned To – pick the person that is to complete the activity.

NOTES - add notes in the Note Section for what needs to be done on the activity.

After completing all the areas, you will select SCHEDULE. You or the assigned person will receive a notification that they have been assigned an activity.

3. Completing an Activity:

After you have completed the Activity, you will add in any notes needed about completing the task and you click DONE and the information will be saved.