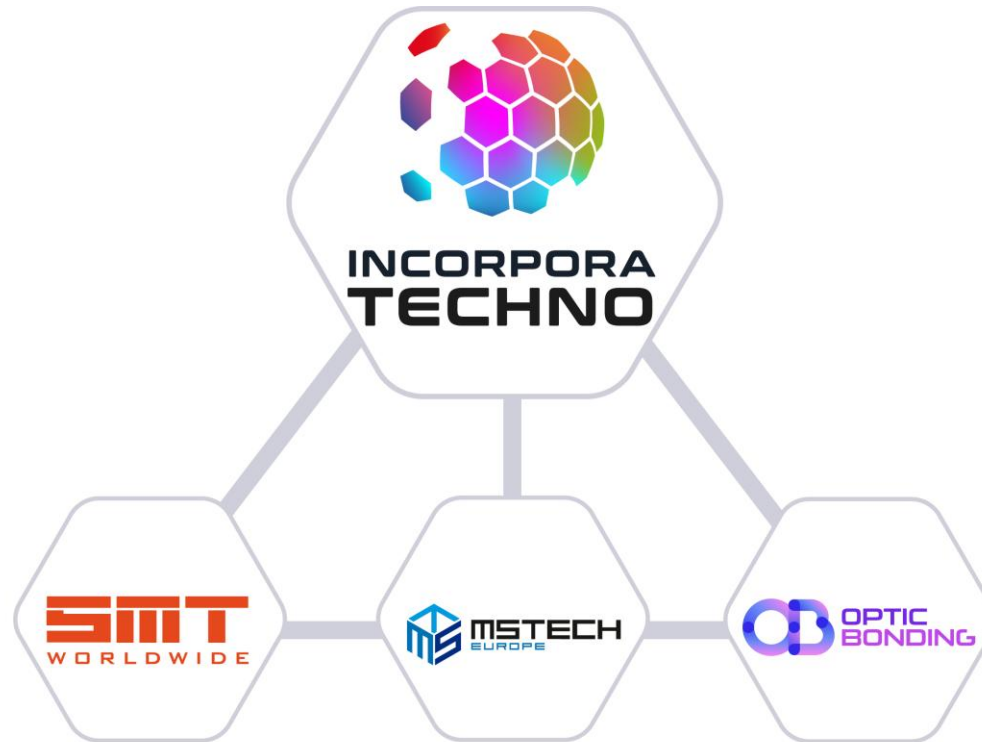


# ODOO SALES TEAM MANUAL



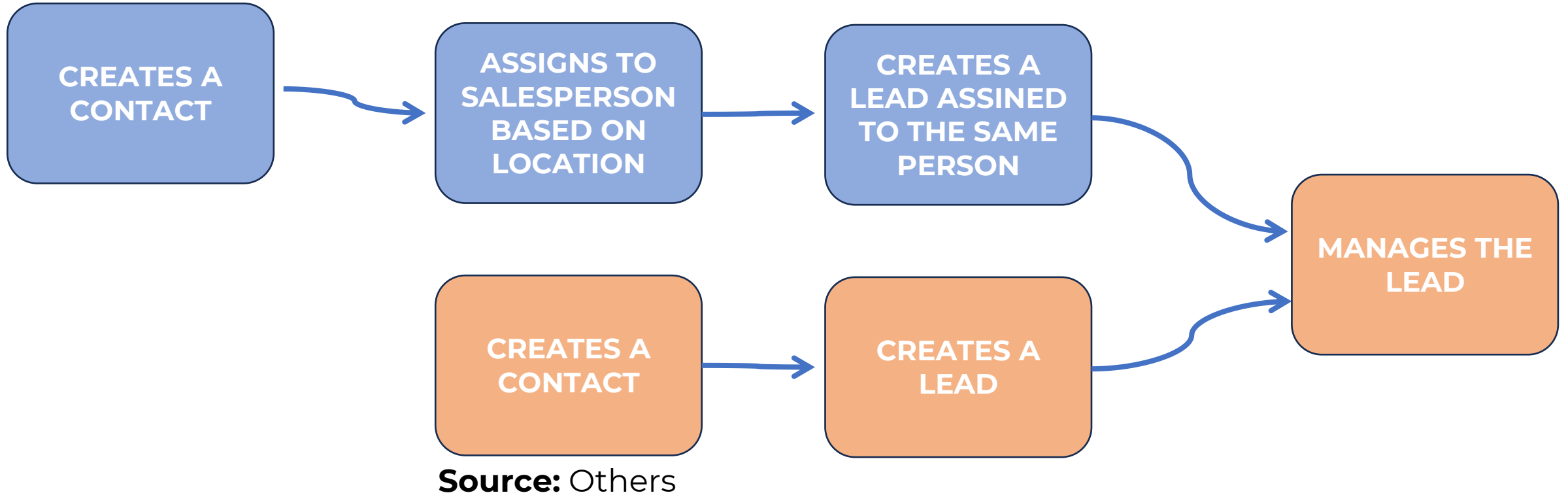
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# PROSPECTION FLOW

**Source:** Events, fairs,  
website/inbound



MARKETING

SALES



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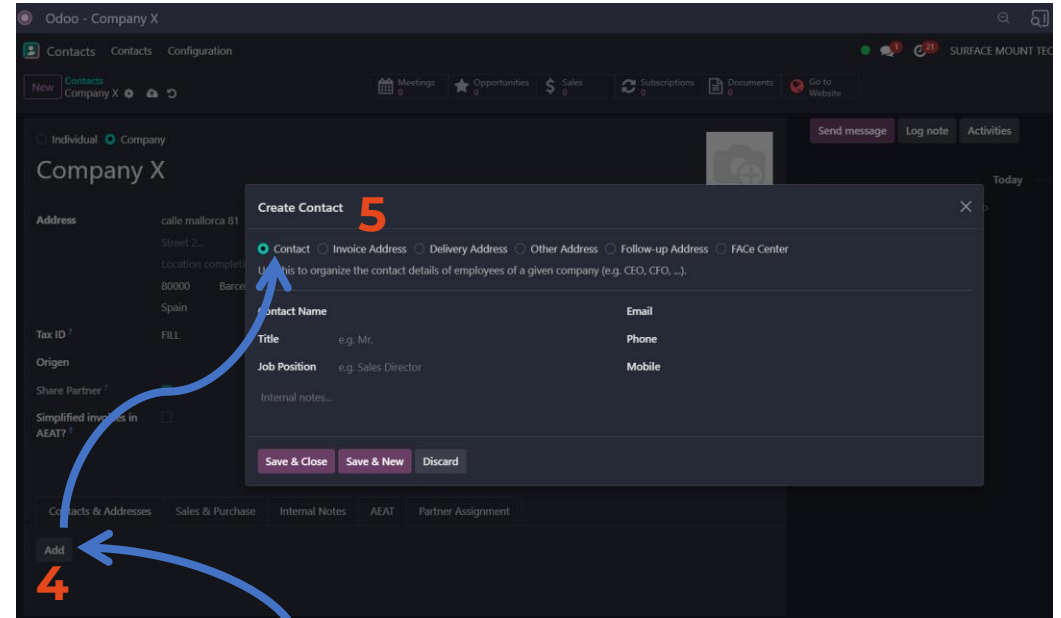
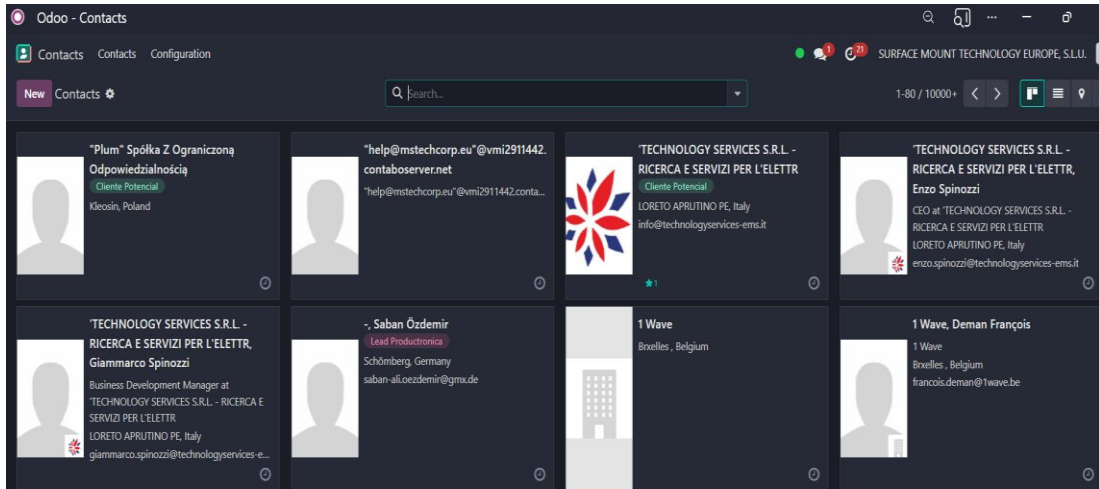


# CREATE A CONTACT

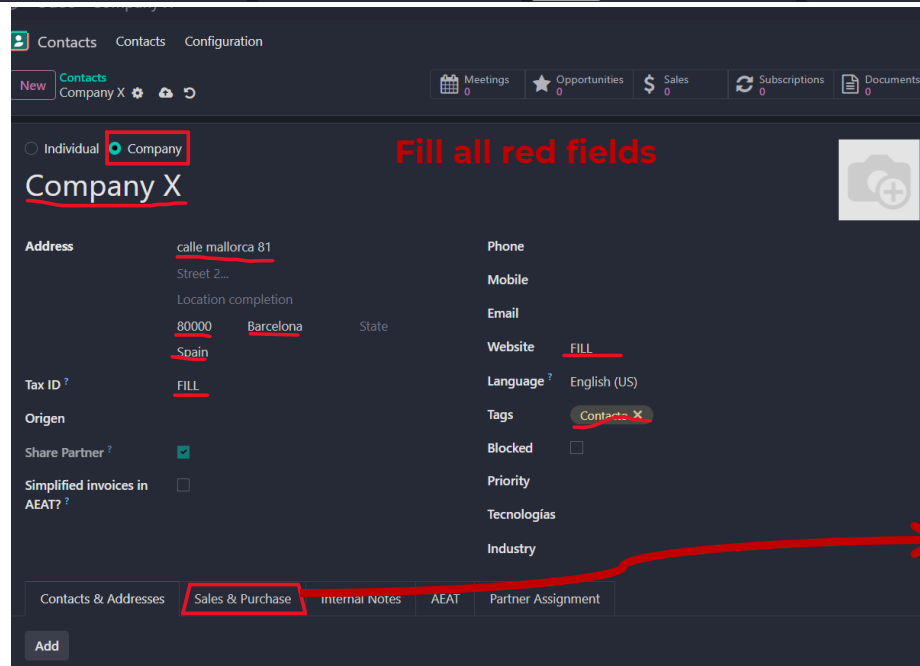
Once you have created your contacts you can create Leads & Opportunities linked to them

Before creating a Lead or an Opportunity => Create a CONTACT if it does not exist already

1

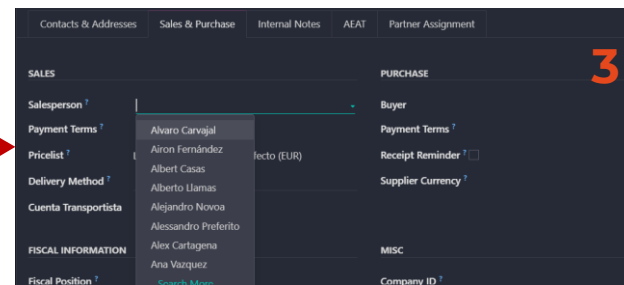


2



Fill all red fields

Once Company is created in contacts you can add people



3

Click "Sales and Purchase" to associate the contact to a Salesperson



# FILTERS & VIEWS



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# Check your Leads

As some Leads/contacts are created and assigned by Marketing it is important to review both frequently to avoid missing opportunities. You can do that by applying filters and saving views:

1

2

3

4

Filter by **“Salesperson”** – **“is in”** – **“your name”** then click **“Add”**

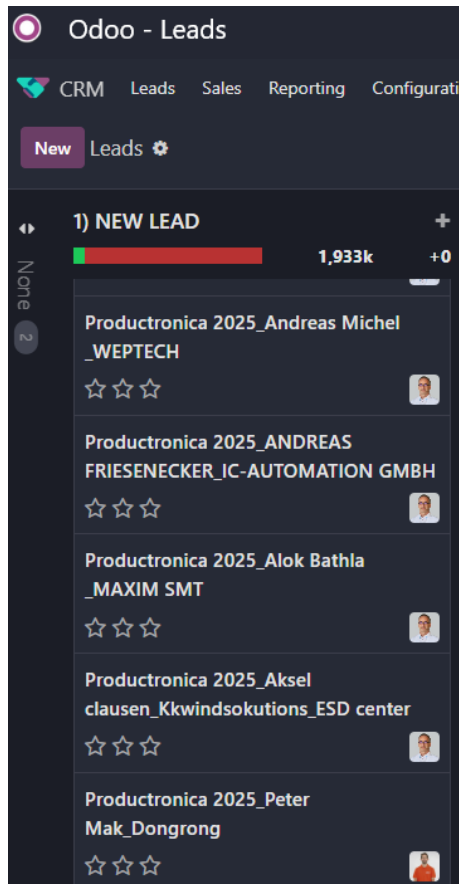
Once your filter is applied, go back to step 1 and select **“Save Current”** – **“Default Filter”**, name your view and click **“Save”**

**\*You can click “Shared”, if you want your filter to be available to use for all the organization**

# FILTERS & VIEWS

By using filters and views you can quickly see if you need to do a follow-up on a Lead or a Contact:

For example, after an event like Productronica 2025:



All these Leads were assigned by marketing and need to be verified by the salesperson:

- If it is not a Lead (for example an existing customer, a duplicate or directly an opportunity, you can move it to the correct section or erase it)
- If it is a real Lead, you need to contact it and qualify it.

*\*Marketing will register all contacts gathered during events or campaigns to create Leads, without knowing if they are existing customers or new leads. It is therefore **the salesperson's responsibility** to review these records and classify them correctly.*



**LEADS**

**SMT**  
WORLDWIDE

**MSTECH**  
EUROPE

**OB** OPTIC  
BONDING

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# LEADS

CRM

## LEAD

**What it is:**  
 A contact, early signal of interest, or a company you've identified and would like to connect with because you believe there could be potential collaboration, not qualified yet.

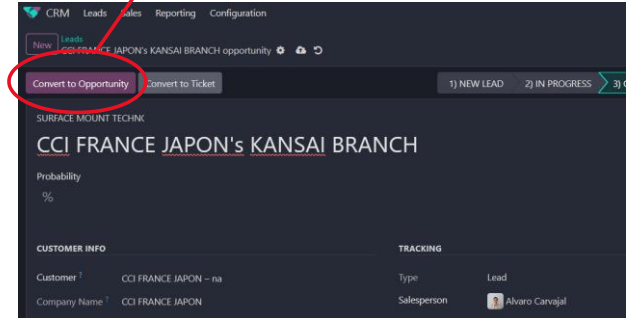
**Key characteristics:**  
 Potential interest, not confirmed.  
 Missing key information (end customer, budget, timing, scope).  
 Can come from a trade show, email, referral, website, distributor, or even a casual encounter.

**Example:**  
 A contact from a company writes asking for "general information" about vision solutions, without specifying for which project, when, or what budget. (Even if it's an existing customer or partner, if the interest is not confirmed, it's still a lead.)



Status	Description	Key Criterion	Example
<b>NEW LEAD</b>	A company or individual contacts us requesting information, or a target company is identified but not yet contacted.	No commercial interaction has taken place yet.	Incoming web inquiry or target account identified at a trade fair with no contact yet.
<b>IN PROGRESS</b>	The salesperson has replied or initiated contact and is in the first exchange phase.	Active contact exists, but no clear need or project has been identified yet.	First reply email sent or initial call to understand the context.
<b>QUALIFIED</b>	The lead has responded and demonstrated clear interest in our products/services or a potential collaboration.	A concrete need and real commercial intent are identified.	Requests a technical call, demo, or shares project details.
<b>REJECTED</b>	The salesperson considers the lead not relevant or not a good technical or commercial fit.	No real interest or no fit with MSTECH.	Project out of scope or no response after several follow-ups.

\*Convert a Qualified Lead to opportunity once there is a concrete need expressed by the client





# CREATING A LEAD

1 Click "New"

2 Select the contact company that you created before

3 Define the priority of your Lead from 1 to 3 stars

4 Click "Edit" then click "Lead Info"

NEW LEAD

Organization / Contact ?

Opportunity  
e.g. Product Pricing

Email  
e.g. "email@address.com"

Phone  
e.g. "0123456789"

Expected Revenue  
€0.00 ☆☆☆ 3

€0.00 e.g. "Monthly"

Add Edit

CRM Leads Sales Reporting Configuration

New Leads CLIENT NAME - LEAD INFO

Similar Lead

1) NEW LEAD 2) IN PROGRESS 3) QUALIFIED 4) REJECTED

Enrich Convert to Ticket

SURFACE MOUNT TECHN

CLIENT NAME - LEAD INFO

Probability  
%

CUSTOMER INFO	TRACKING
Customer ? TECHNOLOGY SERVICES S.R.L. - RICERCA E SERVIZI PER L'ELETTR. - IT01679160687	Type Lead
Company Name ?	Salesperson Alvaro Carvajal
Email info@technologyservices-ems.it	Sales Team Sales
Phone +39 085 795 2044	Company SURFACE MOUNT TECHNOLOGY EUROPE S.L.U.
	Expected Closing ?
	Assignment Date 01/24/2026 10:24:37

DETAILS

Business Unit

Division

Categories ?

Product types

Supplier

Internal Notes Lead info 5

LEAD SOURCE

Origin ? Productronica 2025

Source ? Direct

Referred By

6 Complete "Origin" and "Source" fields

- **Origin** = The event that generated the Lead (Fairs, visit, email campaign, project Follow-up)
- **Source** = The type of interaction you had with the Lead (Direct, email, linkedin..)



# OPPORTUNITIES

**SMT**  
WORLDWIDE

**MSTECH**  
EUROPE

**OB** OPTIC  
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CRM

# OPPORTUNITIES FOR SMT

	<b>NEW 1</b>	<b>QUALIFICATION 2</b>	<b>RFQ VALIDATION 3</b>	<b>PROPOSITION 4</b>	<b>NEGOTIATION 5</b>	<b>WON 6</b>	<b>LOST 6</b>	<b>ON HOLD 6</b>	<b>INVOICED 7</b>
<b>DESCRIPTIO N</b>	Sales converts Qualified Lead to Opportunity or creates it directly	Sales can qualify Lead or assign activity to Finance for them to review solvency	Sales Assigns Activity to Service Team (Only for Services)	Sales Assigns Activity to BackOffice Team	Backoffice assigns Activity to Sales	Formal confirmation from client/PO	 Indicate lost reason	Monitor until there is a change	
<b>KEY CRITERIA</b>	Concrete need expressed by a customer or Lead	Potential customer and opportunity are real	The opportunity has a concrete RFQ	The scope of the service &/or the quotes for reselling units are attached	Quote has been sent to the client				
<b>ACTION REQUIERED</b>	Create Opportunity	Review & Qualify opportunity then move to 3 or 5	Review RFQ & Provides a detail scope for the service	Prepares the quote	wait for customer to give WON or LOSS	Monitor until Invoice is sent			

If opportunity is resell only salesperson can move to 4 directly

SERVICE

BAKCOFFICE



SALES





CRM

# OPPORTUNITIES FOR MSTECH

	<b>NEW 1</b>	<b>QUALIFICATION 2</b>	<b>RFQ VALIDATION 3</b>	<b>PROPOSITION 4</b>	<b>NEGOTIATION 5</b>	<b>WON</b>	<b>LOST</b>	<b>ON HOLD</b>	<b>INVOICE D</b>
<b>DESCRIPTION</b>	Sales converts Qualified Lead to Opportunity or creates it directly	Sales can qualify Lead or assign activity to Finance for them to review solvency	Sales Assigns Activity to Tech Team (Only for projects)	Sales Assigns Activity to BackOffice Team	Backoffice assigns Activity to Sales	Formal confirmation from client/PO	 Indicate lost reason	Monitor until there is a change	
<b>KEY CRITERIA</b>	Concrete need expressed by a customer or Lead	Potential customer and opportunity are real	The opportunity has a concrete RFQ	The scope of the project &/or the exact standard unit name is attached	Quote has been sent to the client				
<b>ACTION REQUIRED</b>	Create Opportunity	Review & Qualify opportunity then move to 3 or 5	Review RFQ & Provides a detail scope for the project	Prepares the quote	wait for customer to give WON or LOSS	Monitor until Invoice is sent			

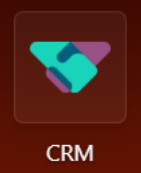
If opportunity is standard unit only (not project), salesperson can move to 4 directly

TECHNICAL

BAKCOFFICE

SALES





# CREATING AN OPPORTUNITY FROM AN EXISTING LEAD

Once you have a **QUALIFIED LEAD** ready to become an opportunity click **“Convert to Opportunity”** then follow the Standard opportunity creation process

The screenshot shows the CRM interface for a lead named 'INVEST IN OSAKA'. The lead is currently in the '3) QUALIFIED' stage. A blue arrow points to the 'Convert to Opportunity' button. The interface includes a navigation bar with 'CRM', 'Leads', 'Sales', 'Reporting', and 'Configuration'. Below the navigation bar, there are buttons for 'New Leads' and 'INVEST IN OSAKA'. The main content area displays the lead details for 'MS TECH EMEA, S.L.' and 'INVEST IN OSAKA'. The 'Probability' is shown as '%'. The 'CUSTOMER INFO' section includes fields for 'Customer?', 'Company Name?', 'Email', and 'Phone'. The 'TRACKING' section includes fields for 'Type', 'Salesperson', 'Sales Team', 'Company', 'Expected Closing?', and 'Assignment Date'.

CUSTOMER INFO		TRACKING	
Customer?		Type	Lead
Company Name?		Salesperson	Alvaro Carvajal
Email		Sales Team	Sales
Phone		Company	MS TECH EMEA, S.L.
		Expected Closing?	
		Assignment Date	01/11/2026 10:30:15



CRM

# CREATING AN OPPORTUNITY FROM 0

1) NEW

Organization / Contact ?

FICOSA AUTOMOTIVE, SLU - ESB6543!

LEAR CORPORATION HOLDING SPAIN SLU -

FICOSA AUTOMOTIVE, SLU - ESB65435117

ROBERT BOSCH ESPAÑA FABR MADRID S.A.

BORGWARNER VIANA LDA - PT516440110

SURFACE MOUNT TECHNOLOGY EUROPE, S

Connect Group España Donostia, S.L - ESB7

TEF-MONTAJES Y SERVICIOS S.L. - ESB58293

PREH PORTUGAL LDA. - PT500093822

€0.00 ☆☆☆

€0.00 e.g. "Monthly"

Add Edit

Click "New"

2 Select the contact company that you created before

Define the priority of your Opportunity from 1 to 3 stars

Click "Edit" fill all fields in red - Make sure to fill them correctly to ensure clean data. If you are unsure about a contact please contact the Admin for support

1) NEW 2) QUALIFICATION 3) PROPOSITION 4) NEGOTIATION 6) WON 6) LOST 5) DEFERRED / ON HOLD INVOICED

SURFACE MOUNT TECHNIK

FICOSA AUTOMOTIVE, SLU's opportunity

Expected Revenue €15,000.00 + €0.00 e.g. "Monthly" at 46.19 %

Probability

CUSTOMER INFO

Customer ? FICOSA AUTOMOTIVE, SLU - ESB65435117

Company Name ? FICOSA AUTOMOTIVE, SLU

Email jordi.collado@ficosa.com

Phone +34 666 40 56 97

TRACKING

Type Opportunity

Priority ☆☆☆

Salesperson Alvaro Carvajal

Sales Team Sales

Company SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.

Expected Closing ? 01/24/2026

Assignment Date 01/24/2026 10:43:39

Quotation NA

Expected Delivery Date

DETAILS

Business Unit ELECTRONIC X

Division BACKEND X

Categories ? MACHINERY X

Product types BACKEND - Curino Method (Air ... X

Supplier NORDSON DIMA BV X

Internal Notes Extra Information Lead info

GIVE DETAILS ABOUT THE SCOPE OF THE OPPORTUNITY & PASTE OR ATTACH THE RFQ. THEN CLICK "LEAD INFO AND FILL THE SAME WAY AS EXPLAINED IN SLIDE 5 "CREATING A LEAD"

5



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# ASSIGNING AN ACTIVITY / LOG A NOTE

Activities and Notes can be created from a **CONTACT**, a **LEAD** or an **OPPORTUNITY** in the same way

- Use notes to register relevant information for a contact, lead or opportunity.
- Use Activities to request actions from another department (based on slides 9,12 and 13 guidelines) or to log a call or meeting details.

The screenshot shows the CRM interface for a lead named 'INVEST IN OSAKA'. The 'Log note' button is highlighted with a red box and labeled with a red '1'. A blue arrow points from this button to the 'Schedule Activity' dialog box, which is also highlighted with a red box and labeled with a red '2'. The dialog box shows the 'Activity Type' set to 'To-Do' and the 'Assigned to' field set to 'Alvaro Carvajal'. The 'Due Date' is '01/29/2026'. The dialog box has buttons for 'Schedule', 'Schedule & Mark as Done', 'Done & Schedule Next', and 'Cancel'.

When changing the stage in an opportunity an activity is automatically assigned to a default person/department: for example when moving from new to qualification, Finance is assigned an activity

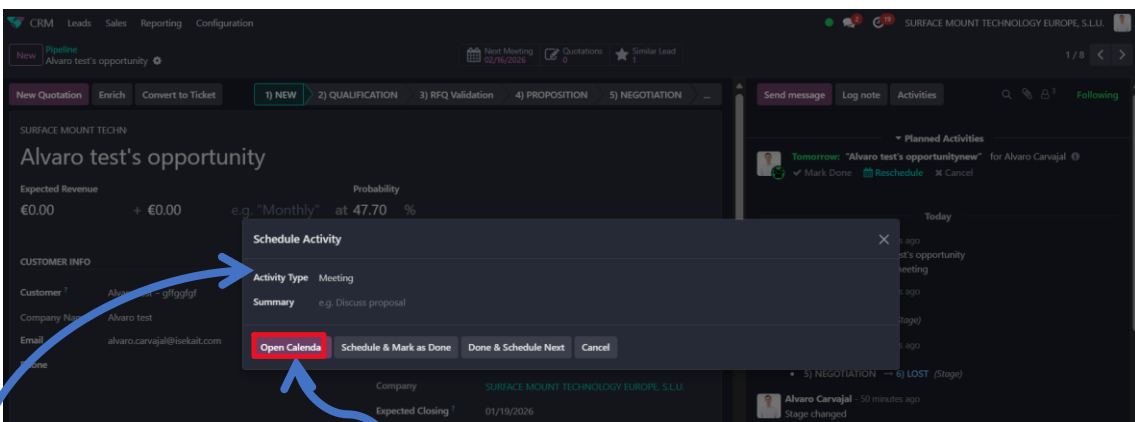
The screenshot shows the 'Planned Activities' section of the CRM interface. It displays a list of activities, including one that is '15 days overdue: "Finance Analysis" for Sergi Sancho'. The activity details include a message in Spanish: 'Hola departamento financiero, Por favor, inicia estudio de financiación para la operación. Detalles a considerar: (Escribe aquí)'. The activity has buttons for 'Mark Done', 'Edit', and 'Cancel'. The 'Edit' button is highlighted with a red box and labeled with a red '3'.

Always check if the assigned person/department is relevant and if not, reassign it to the competent one or erase it.

The screenshot shows the 'Schedule Activity' dialog box. The 'Activity Type' is 'Request financing' and the 'Summary' is 'Finance Analysis'. The 'Due Date' is '01/09/2026'. The 'Assigned to' field is highlighted with a red box and labeled with a red '4'. The dropdown menu for the 'Assigned to' field is open, showing a list of names: 'Alvaro Carvajal', 'Airon Fernández', 'Albert Casas', 'Alberto Llamas', 'Alejandro Novoa', 'Alessandro Preferito', 'Alex Cartagena', and 'Ana Vazquez'. The dialog box has buttons for 'Save', 'Mark as Done', 'Done & Schedule Next', and 'Discard'.

# MEETINGS & CALLS

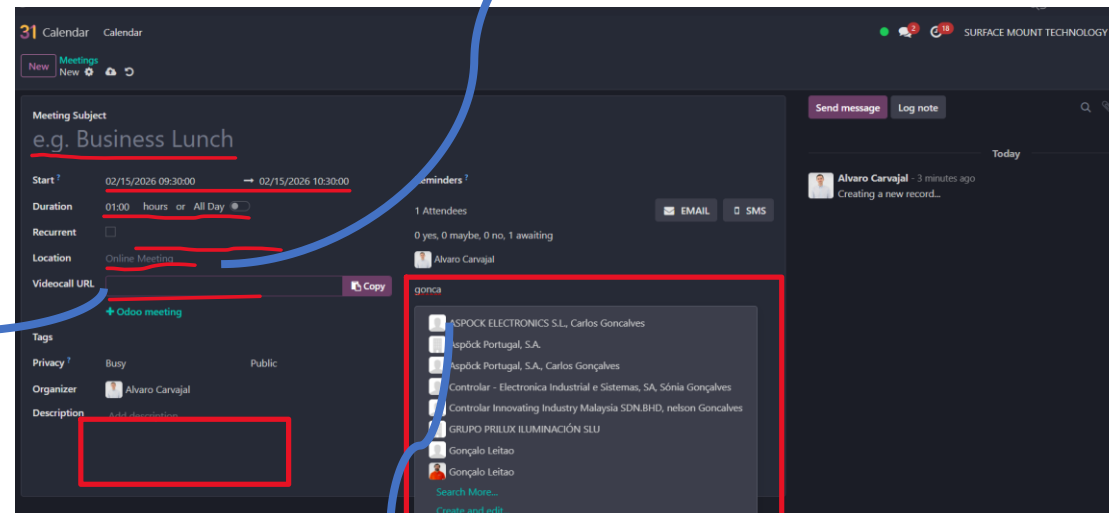
1 Always record all meetings and calls in the Contact/Lead/Opportunity modules and not directly from the Calendar to ensure traceability



2 In "Activity type" select call or meeting

3 Click "Open calendar"

4 Fill all fields in red



In "Location" field write the city of the meeting or "Online Meeting" if it is remote.

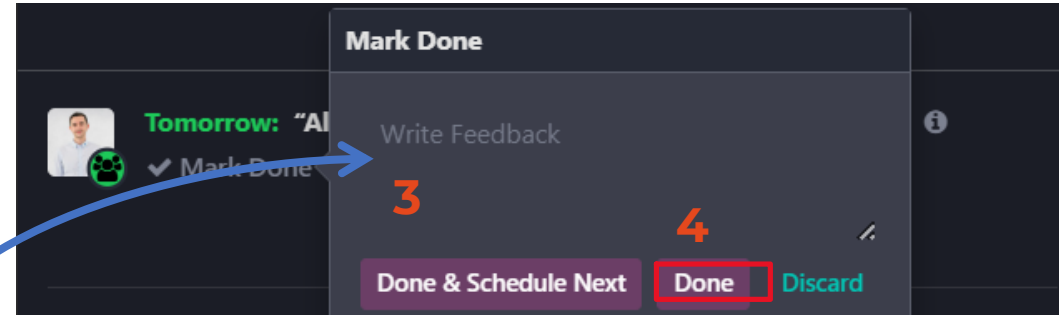
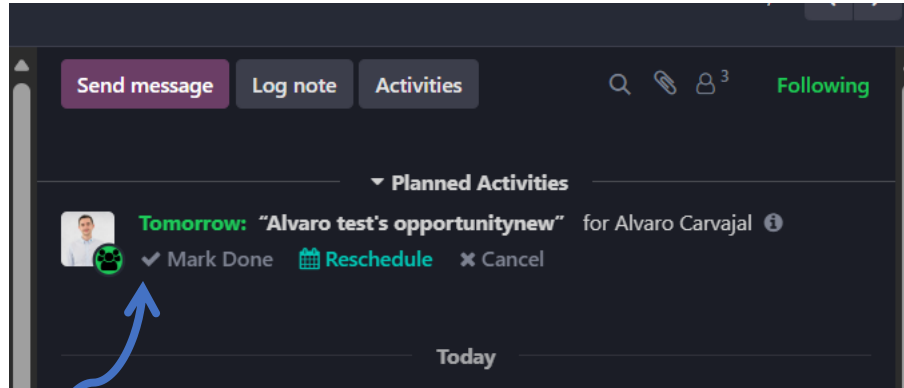
\* Only log calls or meetings that have a relevant business impact.  
If a meeting affects multiple leads and/or opportunities, create the activity on the Contact record (not on a specific Lead/Opportunity).

You can make an Odoo meeting or just paste your meeting url in case of using another tool like Teams, Zoom..

5 When you add an attendee, they will automatically receive an email meeting confirmation.  
**If you don't want an email to be sent** (e.g., you already sent the invite, the meeting has already passed), **remove all attendees before logging/saving the meeting.**

# MEETINGS & CALLS

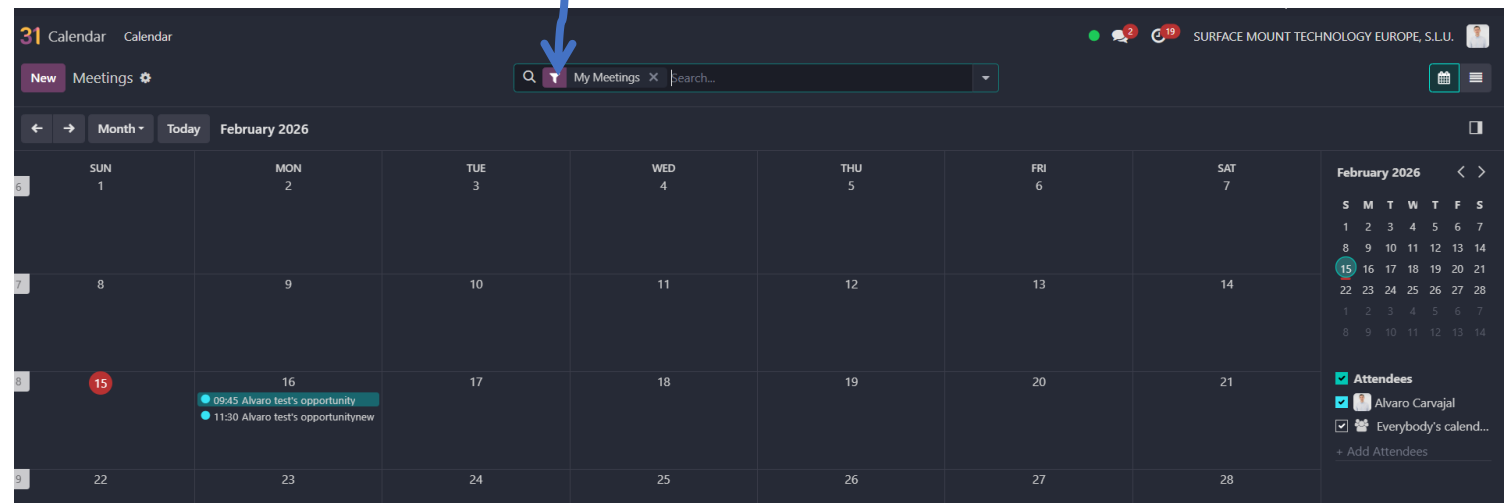
1 Once you created a call or meeting you will see it as any other activities in the chat

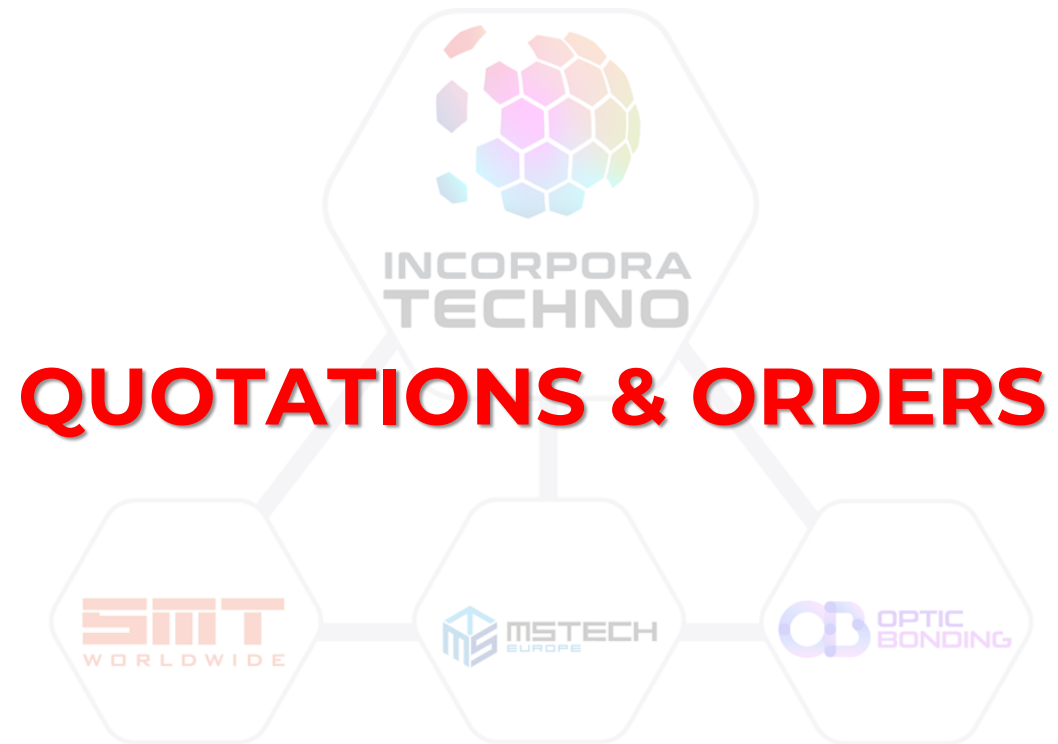


2 Click **“Mark as done”**  
Then write your meeting/call summary and click **“Done”**

*\*Once you click **“Done”** you will not be able to erase the meeting/call or modify the summary*

5 You can use the Calendar module in Odoo to check if your meeting are recorded properly





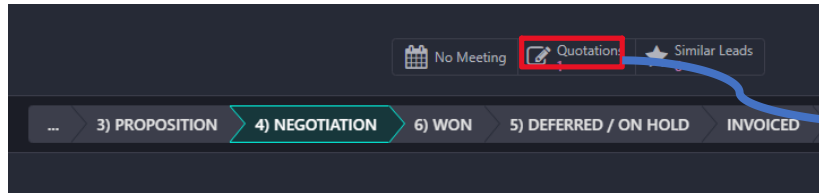
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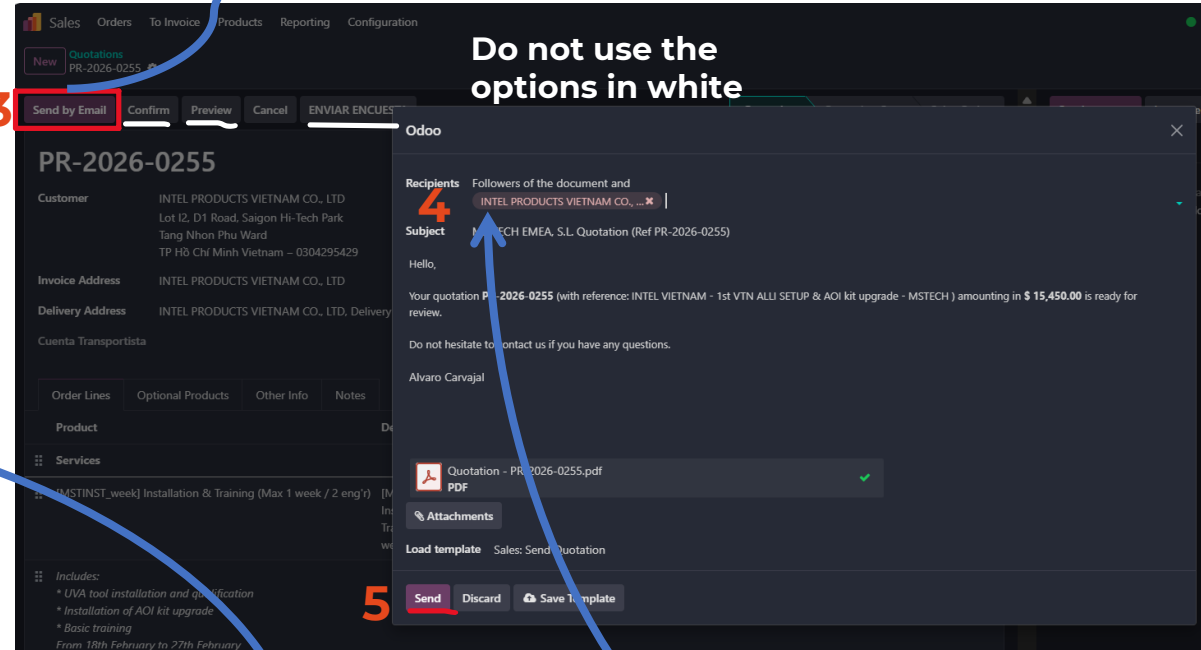


# TRACKING YOUR QUOTES

When Back Office creates a Quote, they attach it to the opportunity, you can then send it to the customer from Odoo or download it to send it via email. Once Quotation has been sent, you can move the opportunity to "NEGOTIATION" stage.

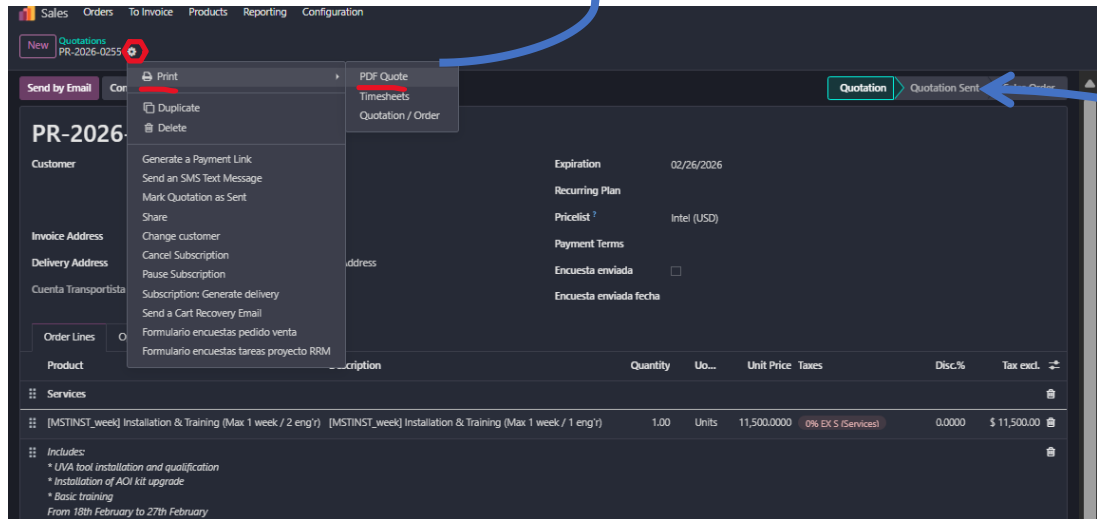


1 Go to an opportunity and click "Quotations"



Once verified you can send your quotation to the customer.

2 Click ⚙ - "print" - "PDF Quote" to download and verify your quote



3 Once sent, the status goes to "quotation sent" **\*if you do not send the Quotation via Odoo, make sure to send it anyway to update the stage. You can put your own email as recipient (4) to do it**

4 Check the recipient & personalize the message by creating your templates before sending the quotation



# TRACKING YOUR QUOTES

Once an opportunity is in **NEGOTIATION** Stage, it means you have shared a Quote with the customer. You can easily track all your quotes & Invoices:

Go to Odoo **“Sales”** module, click **“Orders”** then **“Quotations”** or **“Orders”**, then filter **“My Quotations”** or **“My Orders”**

Number	Creation Date	Customer	Salesperson	Activities	Company	Total	Status
PR-2026-1713	01/20/2026 11:43:43	TL TECHNOLOGIES AND SERVICE VIETNAM COMPANY LIMITED	Alvaro Carvajal		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	16,875.00 €	Quotation
PR-2026-1703	01/19/2026 09:48:18	TL TECHNOLOGIES AND SERVICE VIETNAM COMPANY LIMITED	Alvaro Carvajal		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	1,840.37 €	Quotation
PR-2026-1694	01/16/2026 08:48:10	TL TECHNOLOGIES AND SERVICE VIETNAM COMPANY LIMITED	Alvaro Carvajal		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	26,527.50 €	Quotation
						45,242.87 €	

## Quotations

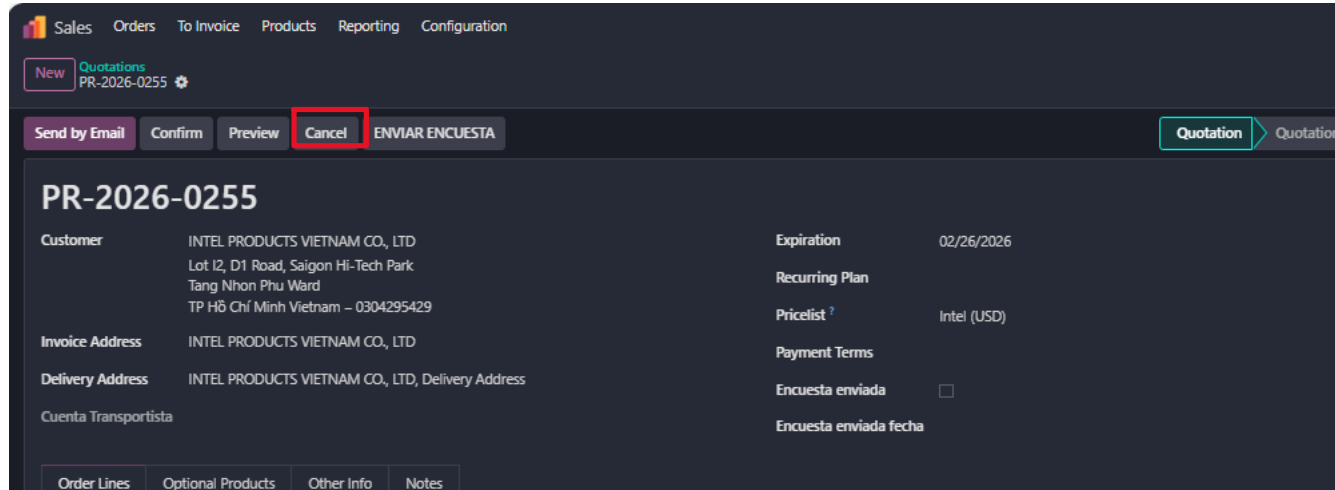
PC-2026-7162	01/15/2026 12:32:39	SAFRAN DATA SYSTEMS			SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	1,816.71 €	Fully Invoiced
PC-2026-0420	01/15/2026 11:03:32	SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	Stephane Etienne		MS TECH EMEA, S.L.	6,679.20 €	To Invoice
PC-2026-7161	01/15/2026 08:17:44	MARELLI ESPAÑA S.A.U.			SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	405.18 €	To Invoice
PC-2026-7160	01/14/2026 16:51:27	ABD MONTAJES ELECTRÓNICOS SL, Álvaro Pérez	Manuel Benito		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	2,722.50 €	Fully Invoiced
PC-2026-7159	01/14/2026 15:54:01	ROMPAL INGENIEROS SAU, Jaqueline Sánchez	Manuel Benito		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	5,445.00 €	Fully Invoiced
PC-2026-7158	01/14/2026 15:13:20	CONATEC S.A.L, AGUSTIN GARATE	Manuel Benito		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	2,722.50 €	Upselling Opportunity
PC-2026-7157	01/14/2026 14:56:33	P4Q ELECTRONICS S.L	Manuel Benito		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	12,402.50 €	Upselling Opportunity
PC-2026-7156	01/14/2026 13:12:44	ELAUSA ELECTRONICS SL	Fidel Peña		SURFACE MOUNT TECHNOLOGY EUROPE, S.L.U.	1,975.29 €	To Invoice

## Orders

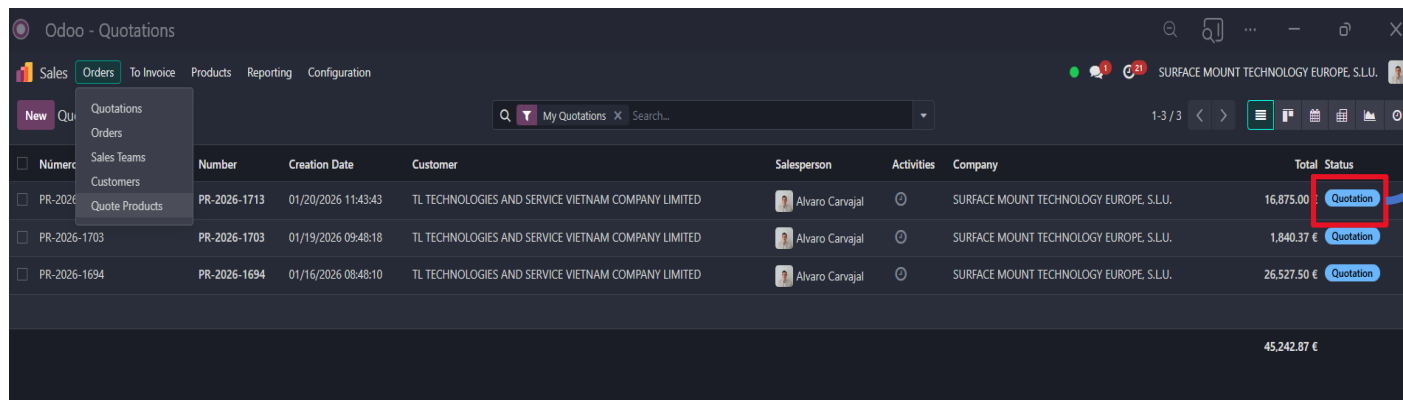


# CANCELLING YOUR QUOTES

In case of losing an opportunity, remember to cancel the linked quotes



\*Once cancelled, the quotes cannot be restored, you will have to create a new one



Track your quotes weekly to cancel the old ones and make sure there is no action to take, If you have some in “Quotation” stage it means you need to take an action either sharing it with the customer or cancelling it.



# DASHBOARDS

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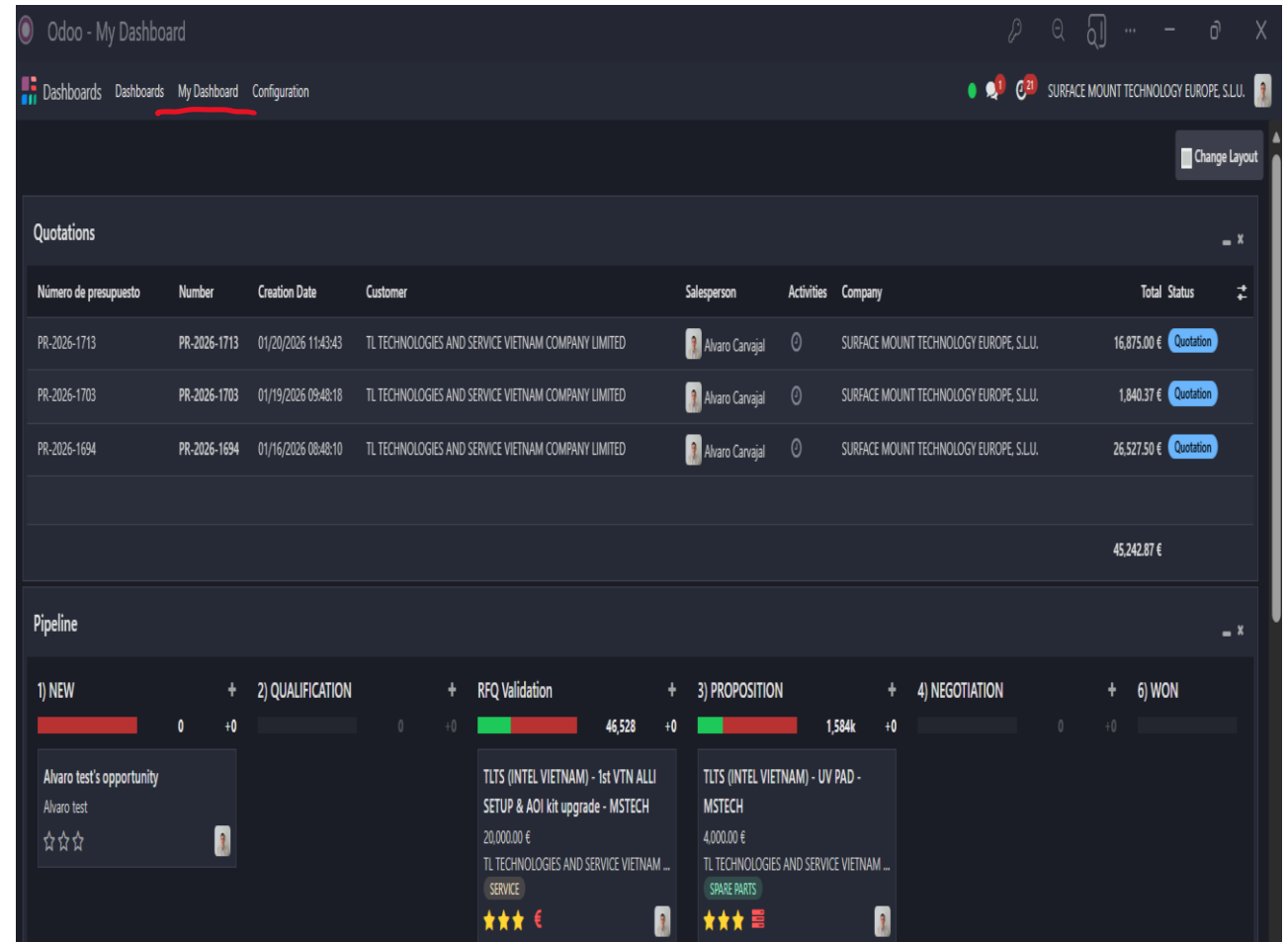
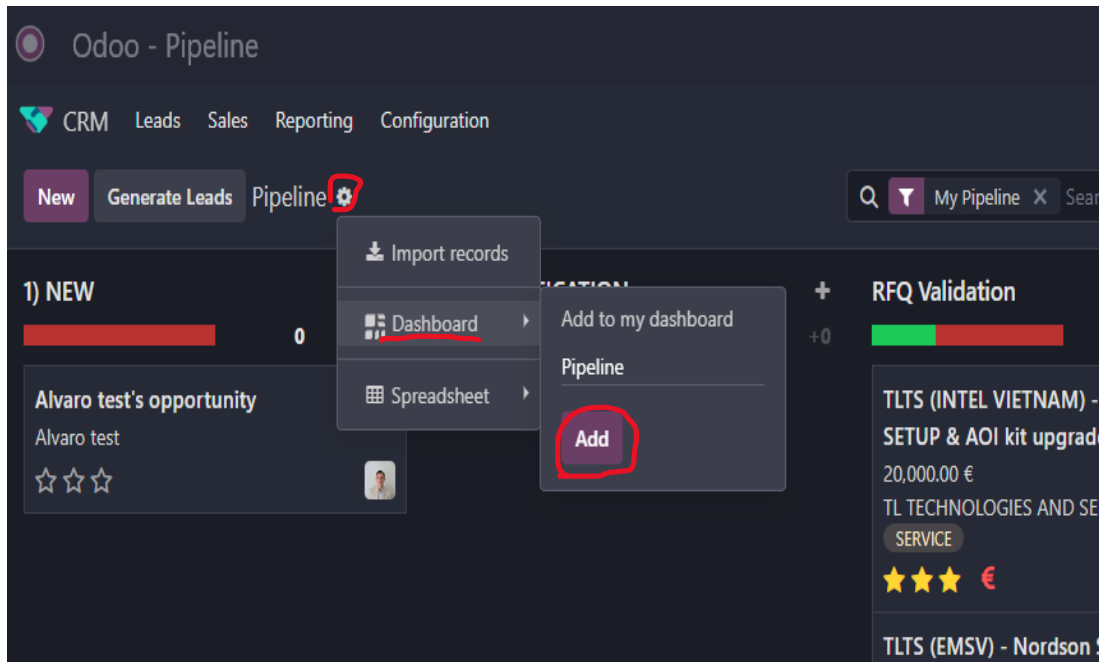


# CREATING YOUR PERSONAL DASHBOARD

In **ALL** ODOO Modules (Sales, CRM, Contact...) you can add your information to a personal dashboard:

1. Select your module (example with LEADS module)
2. Apply the filters of your choice
3. Then click on the 
4. Select **“dashboard”** and click **“Add”**

Once you have added a view, it will appear on your Dashboard (you can add as many views and modules as you want)



# IN PROBABILITY & PRIORITIES

## 10% – Very early interest

- Initial contact or reference identified.
- Limited information, not yet validated.
- No commitment from the customer at this stage.
- Unfavorable track record or no prior references.
- Clear disadvantage versus competitors or low perceived interest.

## 25% – Identified interest

- Customer acknowledges a potential need.
- Active dialogue exists, but requirements are not clearly defined.
- Budget, scope, and timeline are still uncertain.
- Interest is present, but with significant unknowns.
- Neutral history or no established relationship.
- Weak differentiation or high price sensitivity.

## 50% – Structured opportunity

- Need clearly defined.
- Technical and commercial solution aligned with the customer.
- Project is being seriously considered, but no final commitment yet.
- Competitive position is balanced.
- Price aligned with the market and a solid customer relationship.

## 75% – High purchase intent

- Customer is actively evaluating the offer.
- Key terms are being discussed and/or fine-tuned.
- Internal decision process is at an advanced stage.
- Clear advantage over competitors (technical, commercial, or relational).
- Price is competitive or clearly valued by the customer.
- Strong rapport and mutual trust demonstrated.

## 90% – Very likely close

- Technical and commercial agreement is essentially finalized.
- Only formal confirmation remains.
- Risk limited to administrative or external factors.
- Positive history with the customer or direct references.
- Strong and recognized competitive advantage.
- Highly attractive pricing and high-trust relationship.
- Sales owner has high personal confidence in closing.

### Cross-rule (mandatory)

•If there is **no next step + date**, the opportunity **cannot** be **2-star** or **3-star**.

•**3-star** opportunities are reviewed in every weekly forecast meeting; if closing signals weaken, they must be downgraded to **2-star**.

### ★ 1 Star – Exploratory opportunity

•Definition: early interest, not yet strong enough for forecasting.

### ★★ 2 Stars – Qualified opportunity

•Definition: real opportunity with enough information to manage and prioritize.

### ★★★ 3 Stars – “Commit” opportunity (high probability)

•Definition: very mature opportunity with clear closing signals and final actions in progress.

# GOLDEN RULES

## 1. **Data ownership**

*Each salesperson is fully responsible for keeping their Contacts, Leads, and Opportunities accurate and up to date. Review and clean your pipeline weekly (next steps, dates, stage, value, probability).*

## 2. **Single point of contact**

*The salesperson is the single point of contact for the customer for all commercial matters.*

*The only exception is invoice sending, which is handled by Back Office.*

*If another department needs to contact the customer, it must be done in coordination with the salesperson.*

## 3. **Pipeline discipline (when weak)**

*If your opportunity pipeline is weak, you must generate at least 5 new qualified leads per week (logged in CRM with source and next action).*

## 4. **Cross-selling & group synergies**

*Always look for synergies across accounts, product lines (SMT & MSTECH), and geographies: cross-sell, referrals within customer groups, sister sites, and regional expansions.*

## 5. **Unified Information**

*If it isn't in the CRM, it doesn't exist (notes, stakeholders, quotes shared, next steps).*