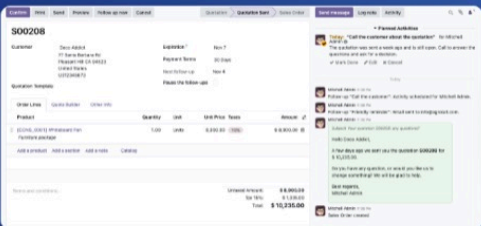


Quotation Follow-up

A guide to the follow-up: the rules, how it works, pause and follow up now, the log and the limits.

1. Start here

In plain words: Most quotations are not lost: they are forgotten. The customer was busy, the salesperson was busy, and a week later nobody remembers who owes an answer. **Quotation Follow-up** does the remembering in Odoo Community: a **friendly email** a few days after the quotation was sent, a **call reminder** for the salesperson, a **last warning** before it expires, each one **logged on the quotation**, with the **next follow-up** planned and a **pause** when you do not want any.



Follow-ups on the quotation

Date	Availability	Recipient	Step	Total	Next step	Next	Next
2023-11-10 10:00	500000	The Company, and Sales	Call the customer	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	John Doe	Call the customer	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	The Company, and Sales	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	John Doe	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	The Company, and Sales	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	John Doe	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	The Company, and Sales	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	John Doe	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	The Company, and Sales	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer
2023-11-10 10:00	500000	John Doe	Send an email	\$ 1,000.00	Send an email	Send an email to the customer	Send an email to the customer

Everything is logged

Step	Trigger	Step	Action	End condition	Log level
1	Send an email	2	Send an email	Quotation is closed	Info
3	Call the customer	4	Send an email	Quotation is closed	Info
5	Send an email	6	Send an email	Quotation is closed	Info

Rules you control

A quotation with its follow-ups, the log of everything sent, and the rules.

Tip: Only open quotations are followed up: as soon as the customer confirms or the quotation is cancelled, it stops.

2. What you get

Feature	What it does
Rules	A number of days after the quotation was sent, or before it expires.
Email	Sends an email to the customer from a template (two ready-made ones, in English and Arabic).
Activity	Schedules a to-do for the salesperson, for example to call the customer.
Minimum amount	A rule can apply only to quotations above an amount.
Once per rule	Each rule follows up a quotation once, and one follow-up per day at most.
Pause	Stop the follow-ups of a quotation for as long as you want.
Follow up now	Send the next follow-up by hand without waiting for its date.
Next follow-up	The date of the next planned follow-up, on the quotation.
The log	Everything that was sent, to whom, by which rule, with the result.
Daily action	A scheduled action runs once a day.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Sales (sale)
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_quotation_followup.zip` ; unzip it to get the folder `taqnix_quotation_followup` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Quotation Follow-up** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_quotation_followup --stop-after-init
```

5. The rules

In plain words: Three rules are ready: a **friendly reminder** by email 3 days after the quotation was sent, a **call** activity for the salesperson after 7 days, and an **about to expire** email 3 days before the validity date. Change them in **Sales → Configuration → Follow-up rules**, or add your own.

SalesOrdersTo InvoiceProductsReportingConfiguration

1230My Company

NewFollow-up rules

Q Search...

1-3 / 3<>

☐	Name	Trigger	Days	Action	Email template	Log Count	
☐	Friendly reminder	Days after the quotation was sent	3	Send an email	Quotation follow-up: friendly reminder	3	
☐	Call the customer	Days after the quotation was sent	7	Schedule an activity for the salesperson		2	
☐	About to expire	Days before the quotation expires	3	Send an email	Quotation follow-up: about to expire	1	

The follow-up rules.

Field	Meaning
Trigger and days	Days after the quotation was sent, or days before it expires.
Action	Send an email, schedule an activity for the salesperson, or both.
Email template	The template of the email. Edit the ready-made ones or create your own on the Quotation model.
Activity summary / note	The to-do of the salesperson.
Only above	Quotations under this total are not followed up by the rule.

6. How it works

In plain words: Every day the scheduled action looks at the quotations that are **sent** and still open. For each one it finds the next rule that is due and has not been done, and does it: the email goes to the customer and appears in the chatter, the activity lands in the salesperson's list, and a line is added to the log. A quotation gets at most one follow-up a day.

SalesOrdersTo InvoiceProductsReportingConfiguration

1230My Company

NewQuotationsS00208Follow-ups21/1

ConfirmPrintSendPreviewFollow up nowCancelQuotationQuotation SentSales OrderSend messageLog noteActivity

S00208

CustomerDeco Addict77 Santa Barbara RdPleasant Hill CA 94523United StatesUS12345673

Expiration?Nov 7Payment Terms30 DaysNext follow-upNov 4Pause the follow-ups

Quotation Template

Order LinesQuote BuilderOther Info

Product	Quantity	Unit	Unit Price	Taxes	Amount
[CONS_0001] Whiteboard Pen Furniture package	1.00	Units	8,900.00	15%	\$ 8,900.00

Add a productAdd a sectionAdd a noteCatalog

Terms and conditions...Untaxed Amount:\$ 8,900.00Tax 15%:\$ 1,335.00Total:\$ 10,235.00

Planned Activities

Today: "Call the customer about the quotation" for Mitchell Admin
The quotation was sent a week ago and is still open. Call to answer the questions and ask for a decision.
Mark DoneEditCancel

Today

Mitchell Admin 11:30 PM
Follow-up "Call the customer": Activity scheduled for Mitchell Admin.

Mitchell Admin 11:30 PM
Follow-up "Friendly reminder": Email sent to info@agrolait.com.

Mitchell Admin 11:30 PM
Subject: Your quotation S00208: any questions?
Hello Deco Addict,
A few days ago we sent you the quotation **S00208** for \$ 10,235.00.
Do you have any question, or would you like us to change something? We will be glad to help.
Best regards,
Mitchell Admin

Mitchell Admin 11:30 PM
Sales Order created

The quotation: the Follow-ups button, the next follow-up, the activity and the emails.

Tip: A customer without an email address is logged as skipped, so that you can fix the contact.

7. Pause and follow up now

Button	What it does
Pause the follow-ups	No automatic follow-up for this quotation until you untick it.
Follow up now	Does the next follow-up of the quotation immediately.
Follow-ups	Opens the log of the quotation.

8. The log

In plain words: Sales → Orders → Follow-ups lists everything that was sent: the date, the quotation, the customer, the rule, the amount and the result. Group it by rule or by salesperson to see who follows up.

Sales Orders To Invoice Products Reporting Configuration 12 30 My Company									
Follow-up log				Search...			1-6 / 6		
☐	Date	Quotation	Customer	Rule	Total	Salesperson	Note	Result	
☐	Oct 23, 11:30 PM	S00019	YourCompany, Joel Willis	Call the customer	\$ 2,001.00	Mitchell Admin	Activity scheduled for Mitchell Admin.		
☐	Oct 23, 11:30 PM	S00208	Deco Addict	Call the customer	\$ 10,235.00	Mitchell Admin	Activity scheduled for Mitchell Admin.		
☐	Oct 23, 11:30 PM	S00019	YourCompany, Joel Willis	Friendly reminder	\$ 2,001.00	Mitchell Admin	Email sent to joel.willis63@example.com.		
☐	Oct 23, 11:30 PM	S00207	Azure Interior	Friendly reminder	\$ 14,260.00	Mitchell Admin	Email sent to vauxoo@yourcompany.example.com.		
☐	Oct 23, 11:30 PM	S00208	Deco Addict	Friendly reminder	\$ 10,235.00	Mitchell Admin	Email sent to info@agrolait.com.		
☐	Oct 23, 11:30 PM	S00209	Gemini Furniture	About to expire	\$ 21,500.00	Mitchell Admin	Email sent to john.b@tech.info.		

The follow-up log.

9. Who can do what

Who	Can
Sales managers	Create and change the rules.
Salespeople	See the rules and the log, pause a quotation and follow up now.

10. Arabic and right to left

My Company

المبيعات الطلبات بانتظار الفوترة المنتجات إعداد التقارير التهيئة

1 / 1

المتابعات 2

عروض الأسعار S00208

إرسال رسالة

النشاط

ملاحظة

إلغاء

تابع الآن

معلنة

إرسال

طباعة

تأكيد

الأنشطة المخطط لها

Mitchell Admin

اليوم: "Call the customer about the quotation"

The quotation was sent a week ago and is still open. Call to answer the questions and ask for a decision.

إلغاء

تعديل

مكتمل

اليوم

Mitchell Admin

11:40 م

Follow-up "Call the customer": Activity scheduled for Mitchell Admin

Mitchell Admin

11:40 م

Follow-up "Friendly reminder": Email sent to info@agrolait.com

Mitchell Admin

11:40 م

الموضوع: Your quotation S00208: any questions?

Hello Deco Addict

A few days ago we sent you the quotation **S00208** for \$ 10,235.00

Do you have any question, or would you like us to change something? We will be glad to help

Best regards

Mitchell Admin

Mitchell Admin

11:40 م

Sales Order created

S00208

العميل

Deco Addict

Santa Barbara Rd 77

Pleasant Hill CA 94523

الولايات المتحدة

US12345673

قلب عرض السعر

بنود الطلب

أداة إنشاء عروض الأسعار

معلومات أخرى

المنتج	الكمية	الوحدة	سعر الوحدة	الخصم	مبلغ
قلم السيرة [CONS_0001] Furniture package	1.00	الوحدات	8,900.00	15%	\$ 8,900.00
إضافة منتج					
إضافة قسم					
إضافة ملاحظة					
كتالوج					
الشروط والأحكام...					
المبلغ دون الضريبة: \$ 8,900.00					
ضريبة 15%: \$ 1,335.00					
الإجمالي: \$ 10,235.00					

A quotation with its follow-ups in an Arabic interface.

11. Limits

Limit	Detail
Replies	The module does not read the customer's reply: confirm or cancel the quotation, or pause its follow-ups.
Sent date	The follow-up counts from the day the quotation was sent from Odoo; for older quotations, from their order date.
Email delivery	The emails use your outgoing mail server like any email sent from Odoo.

12. For developers

In plain words: Skip this chapter if you only use the module.

```
rule = env['taqnix.followup.rule'].create({'name': 'Second reminder', 'trigger': 'after_s
    'template_id': template.id, 'activity_summary': 'Call about the quotation', 'min_amou
env['taqnix.followup.rule']._cron_followup()    # what the daily scheduled action does
order.taqnix_followup_ids, order.taqnix_next_followup
```

13. Troubleshooting

Problem	What to do
Nothing is sent	The quotation must be in the Quotation Sent state, not paused, and its date reached.
Skipped in the log	The customer has no email address, or the quotation has no salesperson.
The email is not what I want	Edit the email template of the rule.
A rule seems not to fire	Each rule follows a quotation up once; check the log of the quotation.

14. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_quotation_followup` . Your rules, templates and the log are kept.

15. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Follow-up rules: days after the quotation was sent or before it expires; email, activity or both
- Three ready-made rules and two email templates in English and Arabic
- Minimum amount, pause, follow up now, next follow-up date

- Log of the follow-ups, daily scheduled action
- Arabic translation, automated tests

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