CRM Lead Scoring & Routing

User Guide · Odoo 18.0 & 19.0

Rule-based lead scoring and automatic assignment by territory or round-robin

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1. Overview
CRM Lead Scoring & Routing ==========

Add a transparent, rule-based scoring engine and an automatic routing engine to Odoo CRM leads/opportunities - no Enterprise predictive-lead-scoring required.

Scoring ------- * Define weighted scoring rules on any lead field (equals, set, contains, >, <, in-list, email-domain, country, etc.). * Each matching rule adds/subtracts points; total score and a grade band (A/B/C/D) are stored on the lead. * Manual or automatic re-scoring; optional cron sweep of open leads.

Routing ------- * Territory rules map country / state / tag combinations to a sales team and an optional preferred salesperson. * Assignment strategies: round-robin across team members, least-loaded, or fixed owner; respects member capacity caps. * Minimum-score gate so only qualified leads get auto-assigned. * Full audit trail of every assignment decision.

Pure Community CRM extension.

2. Installation
Open Apps, click Update Apps List, search for “CRM Lead Scoring & Routing” (technical name **gb_crm_lead_scoring_routing**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation
After install the following menus become available:

- Scoring & Routing
- Scoring Rules
- Territory Rules
- Assignment Log

4. Feature & Data-Model Reference
The app implements the following records and engines:

Model	Purpose
gb.lead.scoring.rule	Lead Scoring Rule
gb.lead.assignment.log	Lead Assignment Audit Log
gb.lead.territory.rule	Lead Territory / Routing Rule
gb.lead.bulk.rescore.wizard	Bulk Re-score and Route Leads

5. Typical Workflow
1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.