Customer Renewal & Churn

User Guide · Odoo 18.0 & 19.0

Renewal pipeline for contracts and subscriptions with churn-risk scoring

pokutsoft.com

1. Overview

Customer Renewal & Churn-Risk Board
==========

Renewals slip through the cracks when nobody owns a pipeline for them. A contract's end date arrives, the customer is not contacted in time, and the account quietly churns. This module gives sales a dedicated renewal pipeline: every renewable contract becomes a renewal opportunity with a stage, an owner, a renewal value and an automatically-computed churn-risk score.

What it does ---------- * Renewal records that track the current term, renewal date, renewal value and pipeline stage (Upcoming -> Contacted -> Negotiating -> Renewed / Lost). * A weighted churn-risk engine scoring each renewal on configurable signals: days-to-renewal urgency, support-ticket pressure, last-order recency, payment delays and an optional manual override. Produces a 0-100 score and a Low/Medium/High band. * A board (kanban + pivot) to work the pipeline, plus per-customer roll-up of renewal value at risk. * A wizard that generates renewal records in bulk from customers whose orders carry an end/renewal date, and a daily cron that refreshes risk scores and raises an activity when a high-risk renewal gets close.

Complements churn/retention tooling by focusing specifically on the renewal pipeline.

2. Installation

Open Apps, click Update Apps List, search for “Customer Renewal & Churn” (technical name **gb_customer_renewal_churn_risk_board**) 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:

- Renewals
- Pipeline
- Renewal Board
- Generate from Orders
- Analysis
- Configuration
- Stages

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.renewal.stage	Renewal Pipeline Stage
gb.renewal	Customer Renewal
gb.renewal.report	Renewal Pipeline Analysis
gb.renewal.touchpoint	Renewal Touchpoint

gb.renewal.generate.wizard	Generate Renewals from Sale Orders

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.