Quote-to-Order Follow-up

User Guide · Odoo 18.0 & 19.0

Automatic nudge cadence for unconverted quotations with expiry handling

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1. Overview

Quote-to-Order Follow-up Automation
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Stop letting quotations go cold. Define a follow-up cadence (e.g. day 2, day 7, day 14) and the system automatically nudges every still-open quotation on schedule, logs each touch, escalates as the validity date approaches and marks quotes expired when their deadline passes.

Key features ---------- * Reusable cadences made of ordered steps, each with an offset (days after the quote is sent), an action (log note, email the customer, schedule a salesperson activity, or e-sign reminder) and an optional email template. * A daily scheduler walks every open quotation, finds the cadence steps that are now due and executes them exactly once — recording a follow-up log entry per touch so a quote is never nudged twice for the same step. * Validity-aware: steps can be anchored to the quote's expiry instead of its sent date, and an "expiry sweep" marks overdue quotations and optionally notifies the owner. * Per-quotation follow-up status, next-action date and full history, plus a manager view of the pipeline of pending nudges. * Manual "run follow-up now" wizard for a hand-picked set of quotations.

Built on native Sales. No external service.

2. Installation

Open Apps, click Update Apps List, search for “Quote-to-Order Follow-up” (technical name **gb_quote_to_order_follow_up_automation**) 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:

- Quote Follow-up
- Follow-up
- Pending Quotations
- Run Follow-up
- Follow-up Log
- Effectiveness
- Configuration
- Cadences

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
qof.log.report	Follow-up Effectiveness Report
qof.log	Follow-up Log
qof.cadence	Quotation Follow-up Cadence

qof.cadence.step	Follow-up Cadence Step
qof.run.wizard	Run Follow-up Wizard

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.