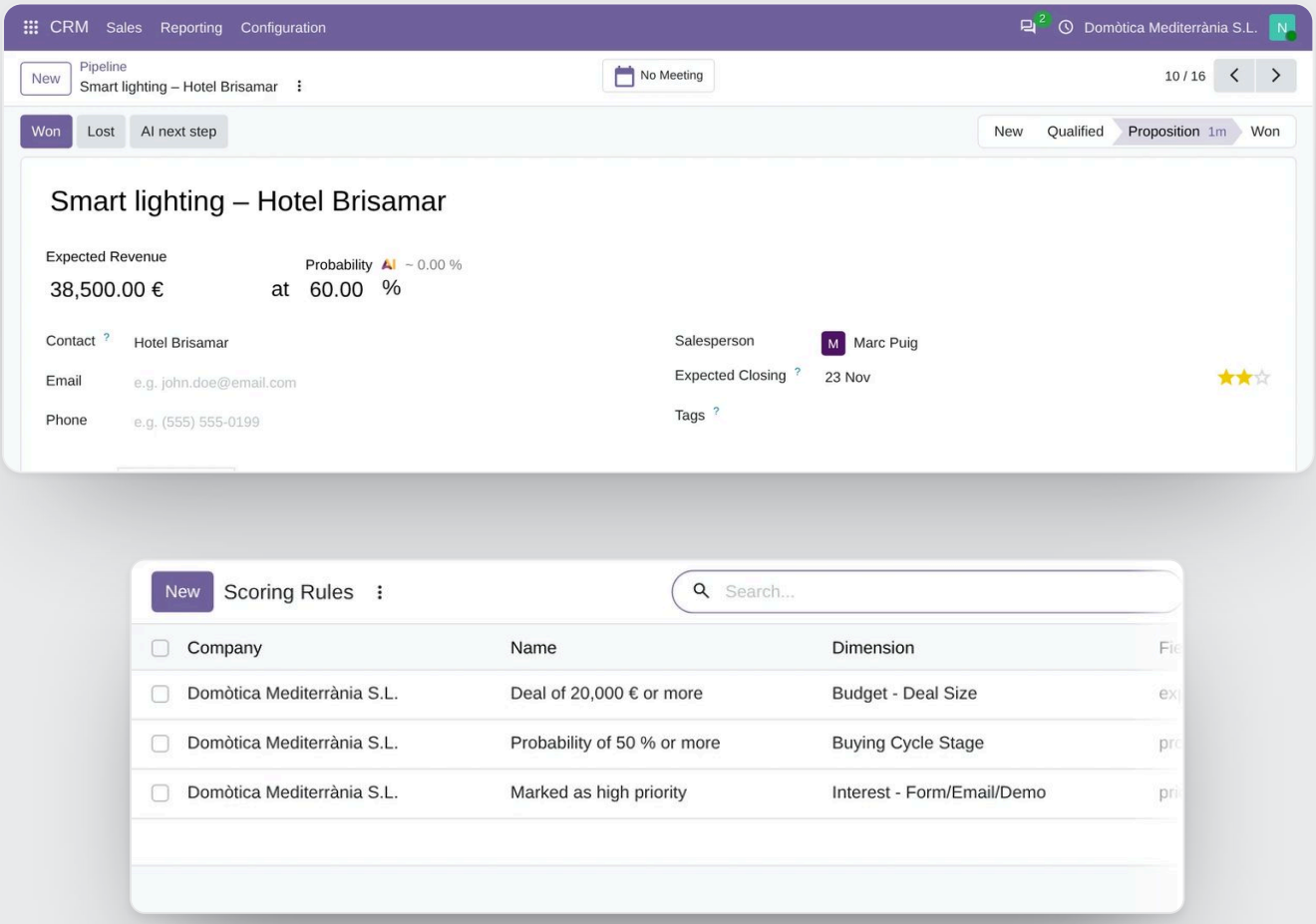
MODULE GUIDE · CRM AND SALES

CRM Lead Scoring for Odoo

Score your leads with your own rules and let FlexigoTech Cloud AI propose the next step of each opportunity, with its risk and a follow-up draft.

Odoo 17 · 18 · 19 · 20 | 14-day trial, no card | Edition of 18-11-2026



Real Odoo 20 screenshot. Above, an opportunity with the AI next step button in its header; below, the list of rules used to score leads.

Contents

On the right, the page where each chapter starts. Menu and button names are those of Odoo in English.

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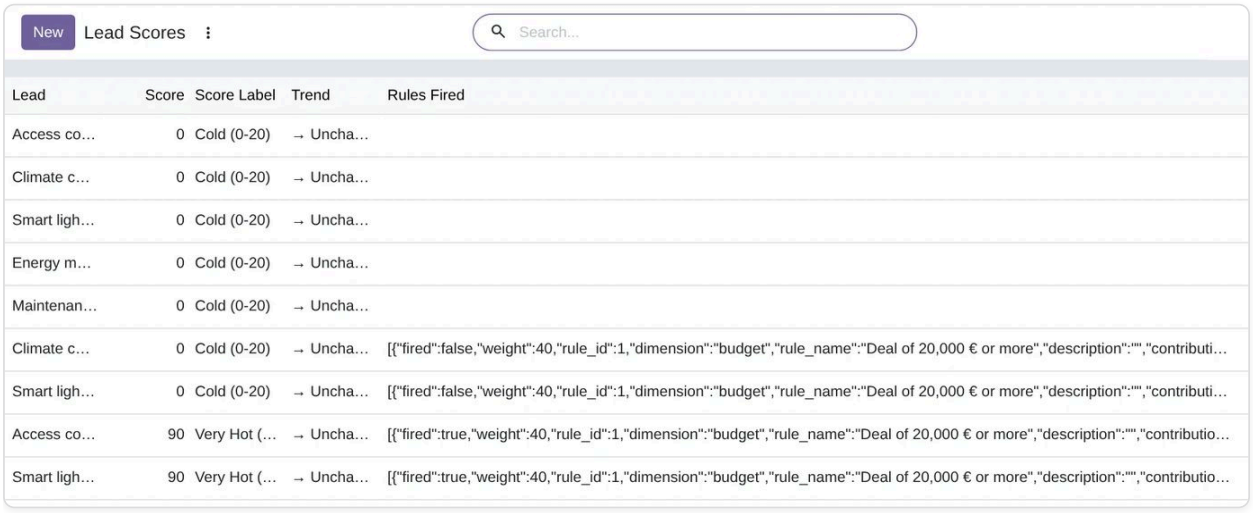
This guide describes version 20.0.1.2.0 of the module (Odoo branch 20.0, commit 01efb393c). Everything in it comes from its published code, the platform's official documentation or real screenshots.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to FlexigoTech Cloud. The module also has a version for Odoo 17, 18 and 19.

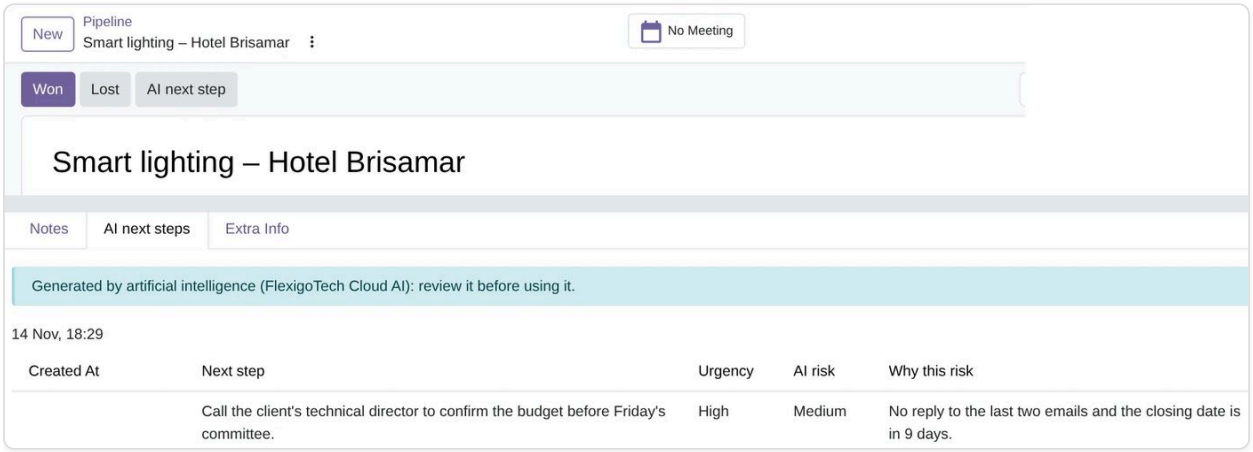
1 Who it is for and what it solves

Without the module, each person decides by eye which leads to work on first. To know what needs doing, opportunities are reviewed one by one. The quarter's pipeline is added up by hand. Won customers who are going cold go unnoticed. And when a GDPR request arrives, the data subject's records are searched for by hand in the CRM.

With the module, each lead has a score from 0 to 100, which is the sum of the points from the rules you have written and that are met. The forecast weights each open opportunity by its probability and by the close rate of its stage. The churn risk is calculated for each won opportunity. GDPR requests are handled with a button and kept in an audit log. For each opportunity, FlexigoTech Cloud AI suggests the next step, its urgency, the risk with its reasoning, and a follow-up draft.



- **Real Odoo 20 screenshot.** The **Lead Scores** list with the score, label and trend of each lead.



- **Real Odoo 20 screenshot.** An opportunity with its AI next step, marked as generated by artificial intelligence.

What changes day to day

- Leads are sorted by a score that depends only on your rules, labelled from **Cold (0-20)** to **Very Hot (71-100)**.
- Every night the scores of new or changed leads are recalculated, and **Run all now** runs everything immediately.
- Every night the forecast for the open pipeline is produced, with the expected amount and its range.
- Won opportunities are placed every night into a risk band according to the days without changes, among other factors.

- Every Monday an email arrives with a summary of the open recommendations from the last 7 days.

What it does not do

- The AI does not score or learn from your sales: the score is the sum of the points from your rules.
- The score does not appear on the opportunity form: it is in **CRM Intelligence › Lead Scores**.
- There is no portal for the data subject: GDPR requests are created by hand by a sales manager.
- The forecast range, with its lower and upper margins, is a fixed margin, not a statistical interval.
- The texts of the rule-based recommendations appear in English in all languages.
- It does not work without a FlexigoTech Cloud subscription or its 14-day trial.

MODULE GUIDE · CRM LEAD SCORING

2 The module in numbers

17 to 20
Odoo versions

14
days of trial without a card

7
scheduled tasks

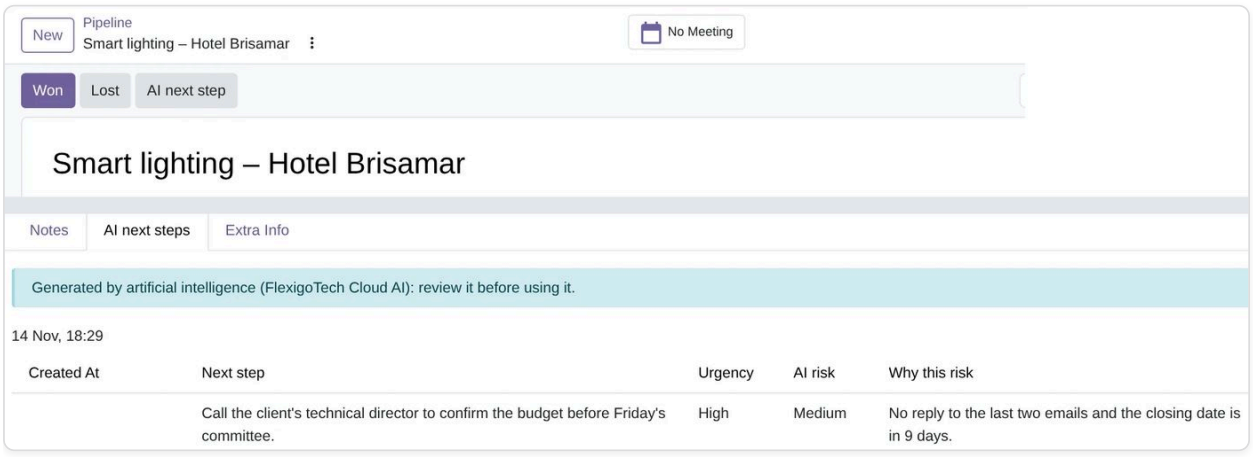
8
AI next steps per night by default

500 or 1,000
documents per month, with the Standard or Pro plan

5,899
lines of code and 156 automated tests

The module's dependencies are Odoo's CRM, email, website and digest, plus FlexigoTech Cloud, so it works in Community and in Enterprise. The support tickets that count towards churn risk come from Helpdesk, which is Enterprise only.

3 Where you see it in your Odoo



- **Real Odoo 20 screenshot.** An opportunity with the **AI next steps** tab open and the **AI next step** button in the header.

CRM Intelligence › Lead Scores	The score of each lead, its label, its trend and the rules that were met.
CRM Intelligence › Scoring Rules	The rules used for scoring: a lead field, an operator and a threshold value.
CRM Intelligence › Revenue Forecasts	The forecast for the open pipeline, with its range.
CRM Intelligence › Sales Quotas	Each salesperson's quota by period and year.
CRM Intelligence › Churn Risk	The risk of each won opportunity.
CRM Intelligence › Behavior Patterns	The interaction patterns of each customer.
CRM Intelligence › Recommendations	The rule-based recommendations and the AI next steps.
CRM Intelligence › Data Subject Requests	The GDPR requests.
CRM Intelligence › Lead Privacy	The privacy flags of each lead.
CRM Intelligence › Audit Log	The record of each calculation and each request.
CRM Intelligence › Configuration	The options for each company, the permission for FlexigoTech Cloud AI and the **Run all now** button.
CRM Intelligence › Metrics	The snapshots you take with **Take snapshot**: how many leads have a score and how many have the industry and activities.
CRM Intelligence › AI Models	Which FlexigoTech Cloud AI model has replied and since when.
CRM Intelligence › Engines	The list of the module's engines.

Outside that menu, the opportunity gains the **AI next steps** tab and the **AI next step** and **Check AI next step** buttons; the second one only appears while a next step is pending. The score does not appear on the

opportunity or on the pipeline: it is only in **CRM Intelligence › Lead Scores**. Every night scoring, forecasting, risk calculation and recommendation updates run, and every Monday the weekly summary arrives. The module's screens appear in the user's language, but the texts of the rule-based recommendations always appear in English.

4 What you need before you start

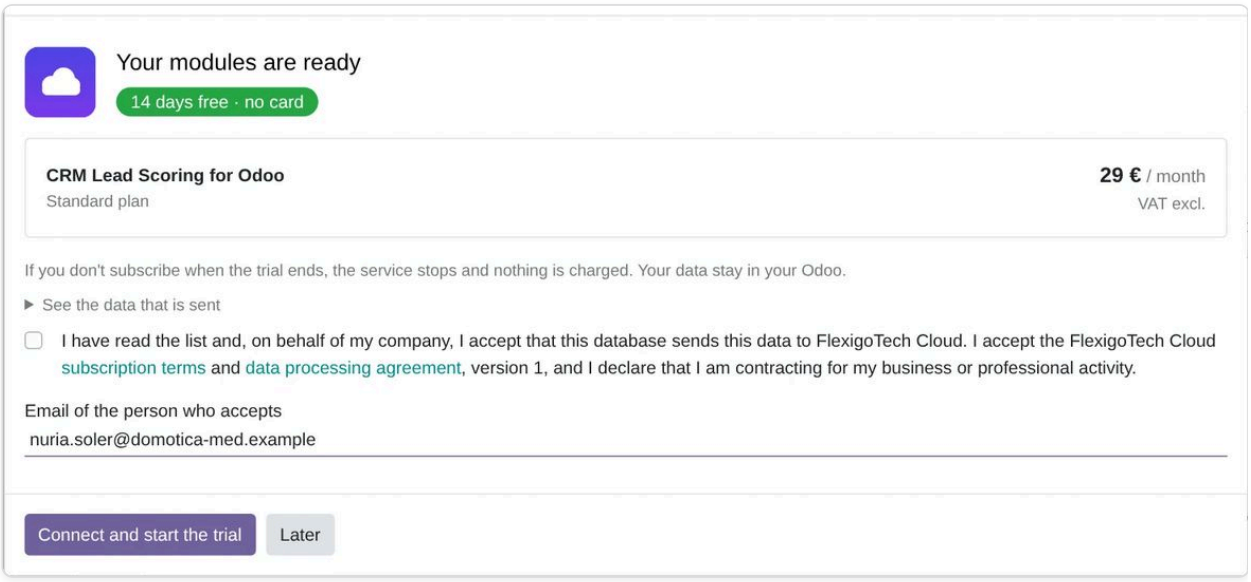
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server. It does not work on Odoo Online, which does not allow installing third-party modules.
- Odoo's CRM, because the module lives in it and works with your leads and opportunities.
- An administrator, who creates the company configuration, accepts what the AI receives and clicks **Run all now**.
- A sales manager, who writes the scoring rules and handles GDPR requests.
- A FlexigoTech Cloud subscription or its 14-day trial, started on the production database: the module needs it.
- Your scoring rules. A new installation does not include any.

> There are things you do yourself: writing the scoring rules, entering the expected amount of the sales quotas, setting the sentiment of tickets and the onboarding that the churn risk uses, and creating and resolving GDPR requests.

It is installed like any third-party Odoo module, on Odoo.sh or on your server. Odoo installs at the same time `flexigotech_cloud`, the connection to FlexigoTech Cloud, and the apps it depends on: CRM.

5 The FlexigoTech Cloud trial

1. **Click Activate in the top bar**
   It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 days free, no card required.



- **Real Odoo 20 screenshot.** The activation window: read the list of data, tick the box and enter your email.

2 **Accept and enter your email**

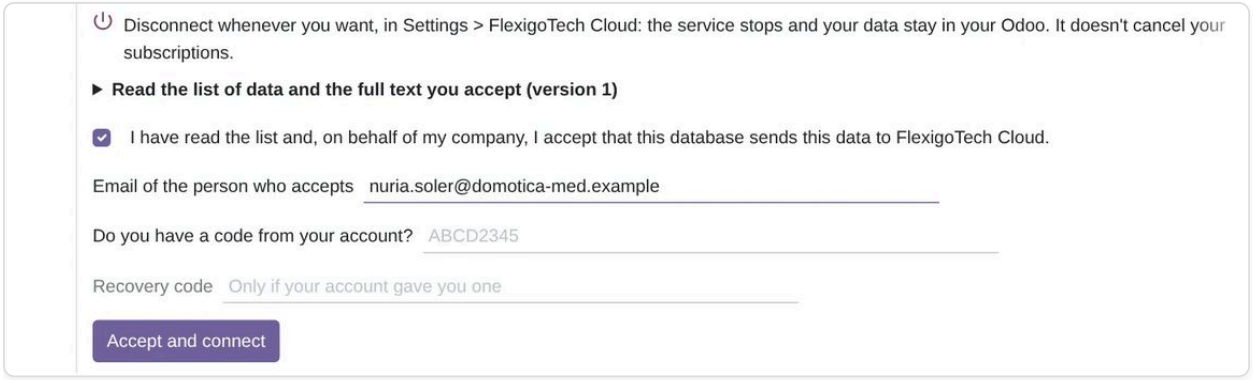
Tick «I have read the list and, on behalf of my company…» (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you leave it for later, **Later** closes the window.

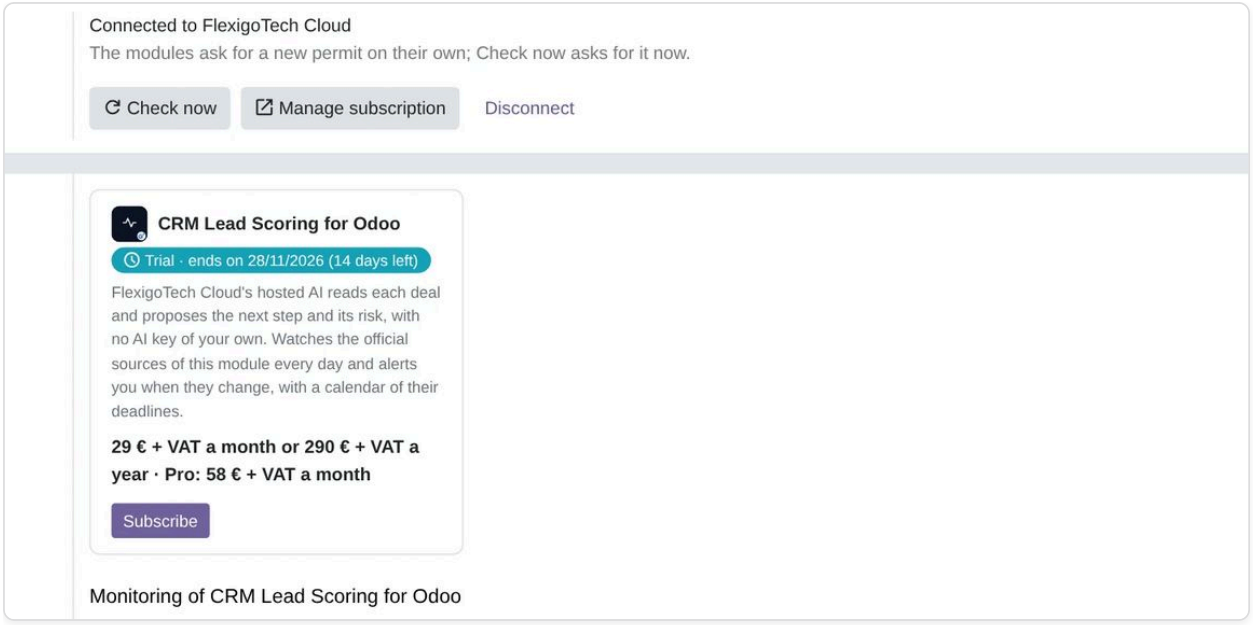
The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the box ticked, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the module on trial.

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged. **Check now** requests the permission immediately (otherwise the module renews it by itself every 6 hours).

> You cannot start a trial on a neutralised copy (staging) or on a database with demo data: Settings says so with «This database is a neutralised copy or has demo data, so trials can't be started here.»

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6 Getting it running step by step

1 **Connect the database to FlexigoTech Cloud**

An administrator goes to **Settings › FlexigoTech Cloud**, connects the database and starts the 14-day trial. The trial must start on the production database, not on a staging copy or a database with demo data.



- **Real Odoo 20 screenshot.** The **FlexigoTech Cloud** block within the settings, with the **Try it free** option.

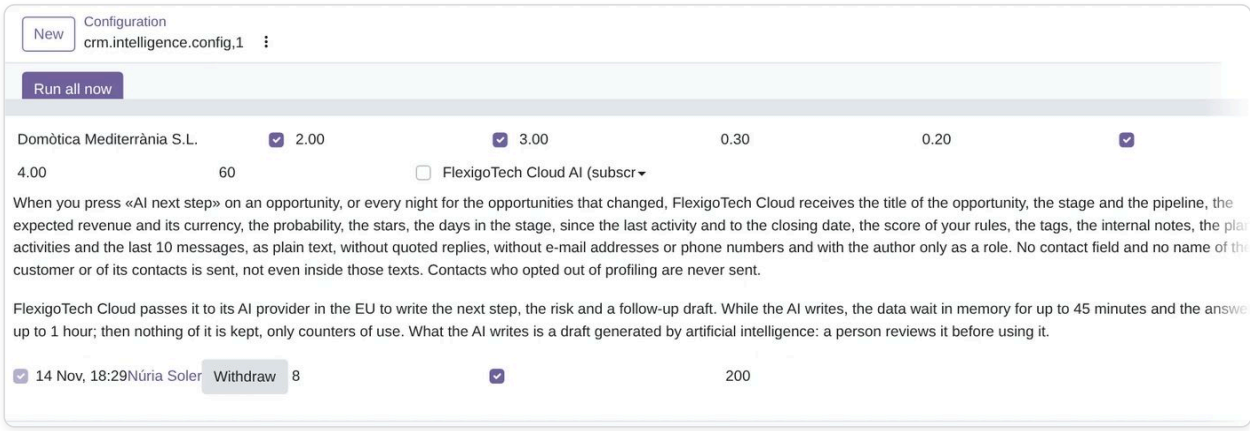
2 **Create your company's configuration**

A new installation does not include it, and without it the night tasks calculate nothing. An administrator goes to **CRM Intelligence › Configuration**, clicks **New**, chooses their company in **Company** and saves.

3 **Read and accept what the AI receives**

On that screen, read "What FlexigoTech Cloud AI receives". That is where the exact text of the data for each opportunity that goes to FlexigoTech Cloud is shown. If you agree, click **Accept and switch on**

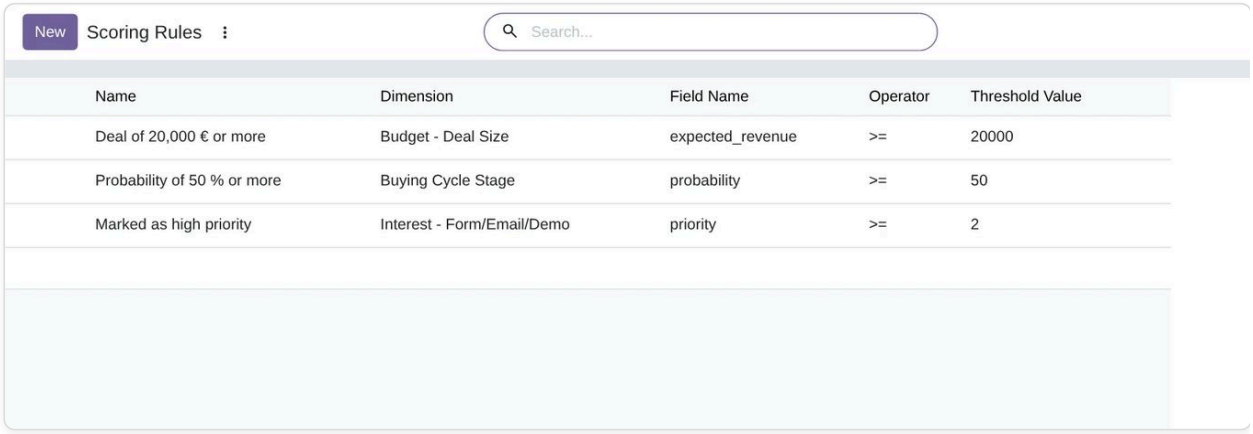
FlexigoTech Cloud AI. The module records who accepted it and when. Until you accept, no opportunity is sent to the AI.



- **Real Odoo 20 screenshot.** The **Configuration** screen, with **Run all now** and the list of what the AI receives.

4 Create your scoring rules

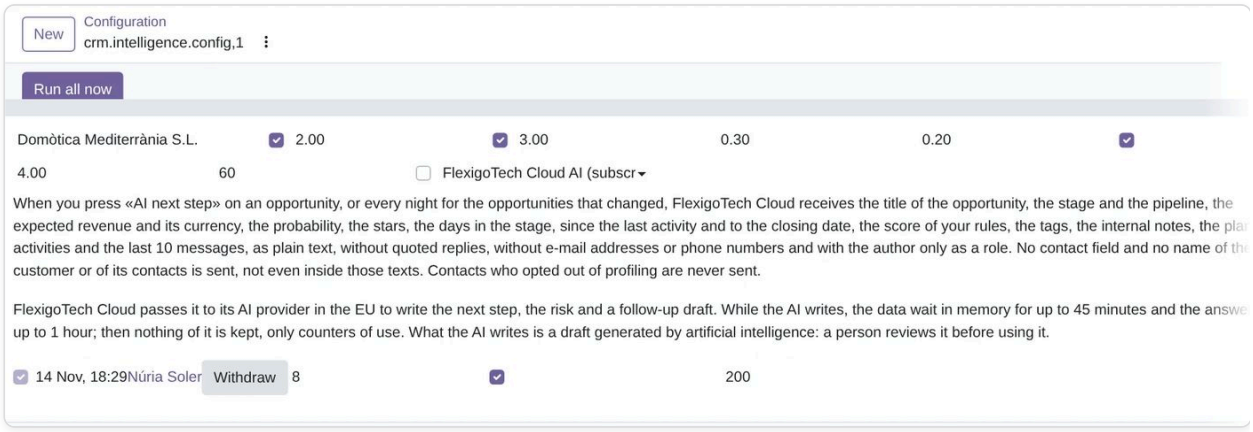
Go to **CRM Intelligence › Scoring Rules** and create your rules. For each one you fill in the **Name**, the **Dimension**, the **Field Name** (the technical name of the lead field the rule checks, typed by hand), the **Operator**, the **Threshold Value** and the **Weight**, which are the points it adds if met, from 0 to 100.



- **Real Odoo 20 screenshot.** The **Scoring Rules** list with three rules already created.

5 Click Run all now

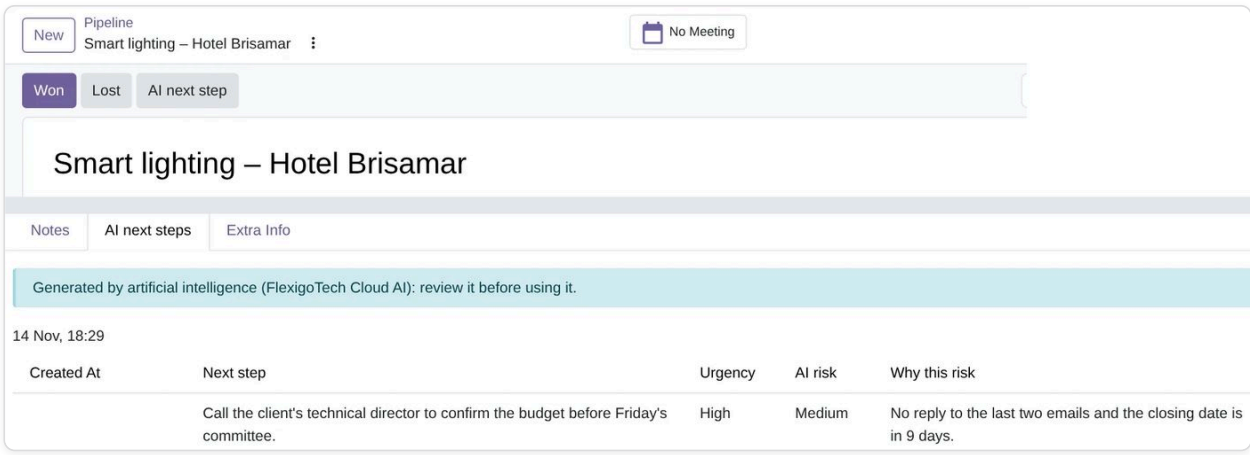
In **CRM Intelligence › Configuration**, an administrator clicks **Run all now**. It does on the spot what happens each night: the scoring, the forecast, the churn risk, the recommendations and, with the AI accepted, the sending to FlexigoTech Cloud of that night's opportunities. This way you get the first scores without waiting.



- **Real Odoo 20 screenshot.** The **Run all now** button on the **Configuration** screen.

6 Request the AI next step

Open an opportunity and click **AI next step**. The answer arrives in a minute or two and is kept on the **AI next steps** tab, marked as generated by AI. While it is pending, **Check AI next step** appears instead of the button.

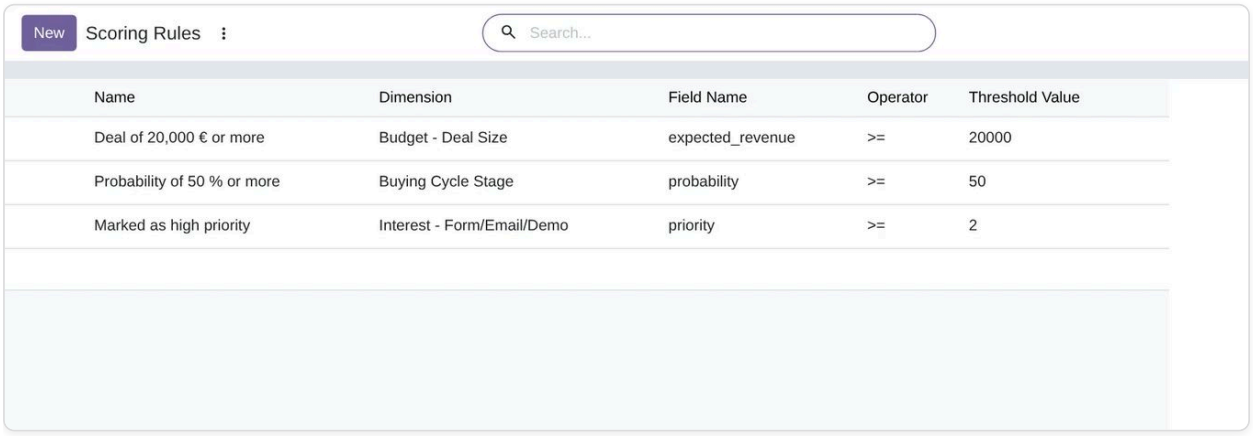


- **Real Odoo 20 screenshot.** The opportunity with the **AI next steps** tab and the notice «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.»

> Accepting what the AI receives, withdrawing it and clicking **Run all now** can only be done by an administrator. A sales manager writes the rules and handles GDPR requests. If someone else tries to accept or withdraw, Odoo says "Only an administrator can accept or withdraw what FlexigoTech Cloud AI receives."

From then on the module works on its own. Every night it scores the leads that were never scored and those someone changed in the last 24 hours, generates the forecast, updates the churn risk and recommendations, and sends the new or changed opportunities to the AI, up to 8 per night by default. Every Monday it sends an email with the open recommendations from the last 7 days to the sales managers or to the recipients you choose in **Configuration**. If you change a rule, leads already scored are not rescored until someone touches them.

7 Your scoring rules: field, operator, threshold and points



- **Real Odoo 20 screenshot.** The **Scoring Rules** list with three rules already created.

Go to **CRM Intelligence › Scoring Rules**. Each rule checks a lead field with an operator and a threshold value. If the condition is met, it adds its points to the lead's score.

What you fill in for each rule

Name	The name of the rule. It is required.
Dimension	The type of signal it measures: **Fit - Industry/Size/Geography**, **Interest - Form/Email/Demo**, **Engagement - Activity Recency**, **Budget - Deal Size**, **Buying Cycle Stage** or **Firmographics - Employee Count/Funding**.
Field Name	The technical name of the lead field the rule checks, typed by hand, such as expected_revenue, probability or priority.
Operator	The list shows =, contains, >= and <=. It defaults to =.
Threshold Value	The value it is compared against. With = and an empty threshold, the rule is met if the field has any value (a checkbox, if it is ticked).
Weight	The points the rule adds if it is met, from 0 to 100. It defaults to 10.
Active	A rule that is not active does not count.
Sequence	The order in which the rules are evaluated.

When it is computed

The scheduled action **CRM Intelligence: Compute Lead Scores** runs every day. You can also click **Run all now** in **CRM Intelligence › Configuration**. The result appears in **CRM Intelligence › Lead Scores**, not on the opportunity form.

How to create a rule

1. **Open the list**
   Go to **CRM Intelligence › Scoring Rules** and click **New**.

2. **Fill in the rule**
   Enter the **Name**, choose the **Dimension**, enter the **Field Name**, choose the **Operator**, and set the **Threshold Value** and the **Weight**.

3. **Save**
   The rule is applied in the next score computation.

> The **Field Name** is required: without it the form will not save. It will not save with a **Weight** outside 0 to 100 either: Odoo shows the English warning «Rule '...' weight must be 0-100», with the rule's name.

Labels and trend

SCORE	LABEL
0 to 20	Cold (0-20)
21 to 40	Warm (21-40)
41 to 70	Hot (41-70)
71 to 100	Very Hot (71-100)

The **Trend** compares with the previous computation: it says it improves if the score rises by more than 2 points, worsens if it falls by more than 2, and otherwise shows no change. Each value is preceded by an arrow.

What each rule checks

The **Field Name** is the technical name of a lead field. If the lead does not have that field, the rule looks for it on its contact's company. This lets you score, for example, the industry with industry_id: a field that points to another record is compared by its name.

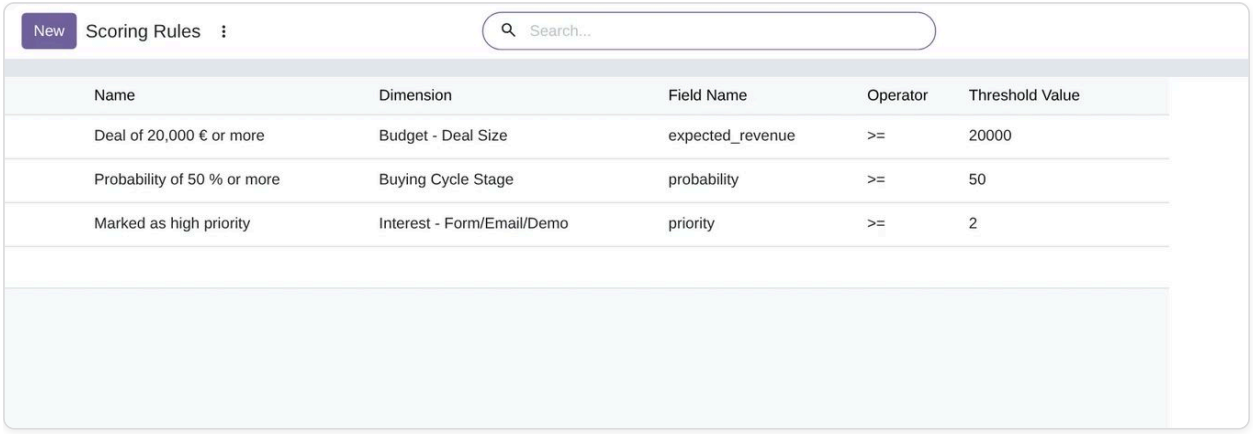
The **Operator** defaults to =. With >= and <= you compare numbers, and with contains you search for text inside the field, ignoring case. With = and an empty **Threshold Value**, the rule is met if the field has any value: on a checkbox, if it is ticked.

Time Decay Days

Time Decay Days defaults to 0 and only counts if it is greater than 0 and the rule belongs to the **Engagement - Activity Recency** dimension. In that case, after 60 days without anyone saving a change to the lead, the rule subtracts 5 points for each extra day. The number you enter does not change those 60 days. And it only acts when scoring: since each night only leads that are new or changed in the last 24 hours are scored, in practice it only subtracts in the first score of a lead that had gone more than 60 days without changes.

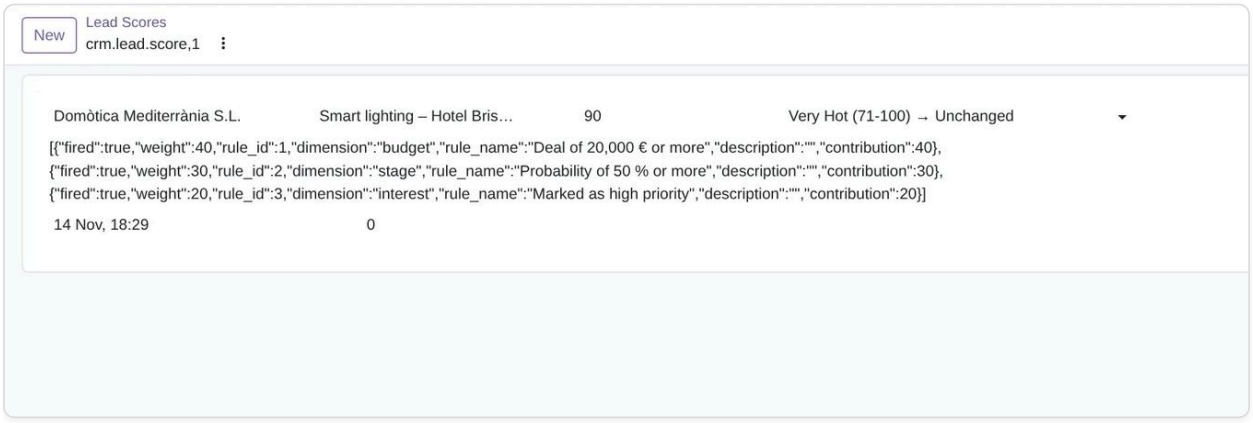
An example with the rules in the screenshots

The list in the screenshot has three rules. The first checks the expected revenue field with the greater-than-or-equal operator and the threshold 20000, in the **Budget - Deal Size** dimension. The second checks the probability with greater-than-or-equal and the threshold 50, in the **Buying Cycle Stage** dimension. The third checks the priority with greater-than-or-equal and the threshold 2, in the **Interest - Form/Email/Demo** dimension.



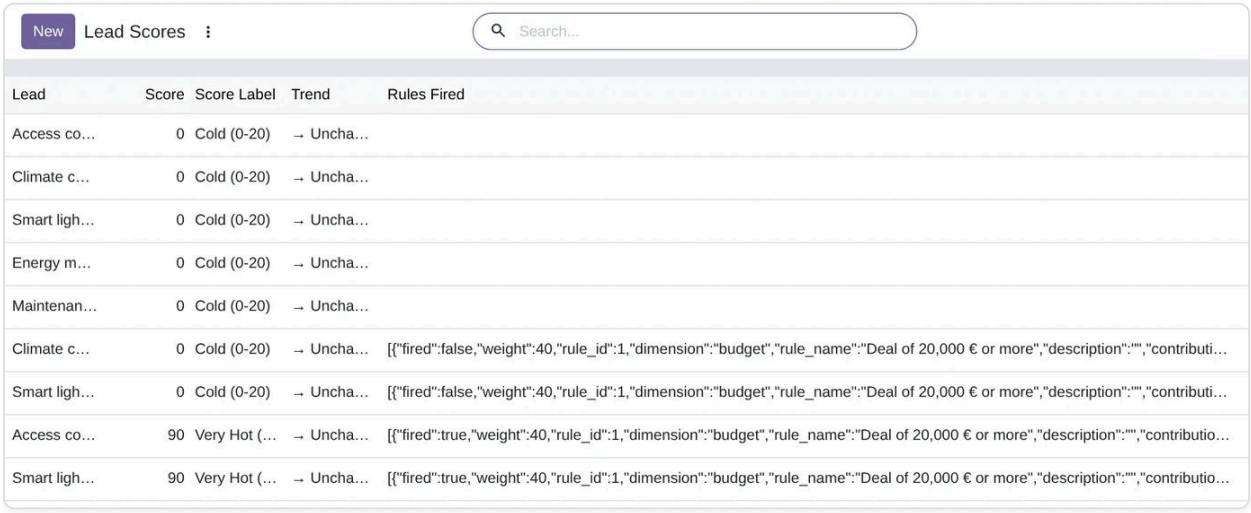
- **Real Odoo 20 screenshot.** The **Scoring Rules** list with the three rules from the example.

On the score form in the other screenshot, all three are met. Each rule met is recorded on the score with the points it contributed, and the score is the sum of those points, capped at 100. The lead falls into **Very Hot (71-100)**.



- **Real Odoo 20 screenshot.** The form of a **Very Hot (71-100)** score with the rules that were met.

8 Each lead's score: 0 to 100, its label and its trend



Lead	Score	Score Label	Trend	Rules Fired
Access co…	0	Cold (0-20)	→ Uncha…	
Climate c…	0	Cold (0-20)	→ Uncha…	
Smart ligh…	0	Cold (0-20)	→ Uncha…	
Energy m…	0	Cold (0-20)	→ Uncha…	
Maintenan…	0	Cold (0-20)	→ Uncha…	
Climate c…	0	Cold (0-20)	→ Uncha…	[{"fired":false,"weight":40,"rule_id":1,"dimension":"budget","rule_name":"Deal of 20,000 € or more","description":"","contributi…
Smart ligh…	0	Cold (0-20)	→ Uncha…	[{"fired":false,"weight":40,"rule_id":1,"dimension":"budget","rule_name":"Deal of 20,000 € or more","description":"","contributi…
Access co…	90	Very Hot (…	→ Uncha…	[{"fired":true,"weight":40,"rule_id":1,"dimension":"budget","rule_name":"Deal of 20,000 € or more","description":"","contributio…
Smart ligh…	90	Very Hot (…	→ Uncha…	[{"fired":true,"weight":40,"rule_id":1,"dimension":"budget","rule_name":"Deal of 20,000 € or more","description":"","contributio…

- **Real Odoo 20 screenshot.** The **Lead Scores** list with the score, label and trend of each lead.

The score is the sum of the points of the active rules that are met for that lead, capped at 0 to 100. FlexigoTech Cloud's AI does not score. Each lead also receives a label according to its score and a trend compared with the previous computation.

The score does not appear on the opportunity form or in the pipeline. To see it, open the menu **CRM Intelligence › Lead Scores**.

Where each piece of data comes from

CRM Intelligence: Compute Lead Scores	Scheduled action that runs every day. Scores the leads that were never scored and those that someone changed in the last 24 hours.
Run all now	Button in **CRM Intelligence › Configuration**, for administrators only. It does right now what happens each night: the score, the forecast, the churn risk, the recommendations and, with AI accepted, the sending to FlexigoTech Cloud of that night's opportunities.

What you see on each record

Lead	The opportunity or lead being scored.
Score	The score number, capped at 0 to 100.
Score Label	**Cold (0-20)**, **Warm (21-40)**, **Hot (41-70)** or **Very Hot (71-100)**.
Trend	Improves, no change or worsens, with an arrow in front, according to the change in score compared with the previous computation.
Rules Fired	List with the detail of the rules evaluated. It is shown in JSON format.
Last Computed	Date and time when the score was computed.

Statuses

The label is the status of each lead and changes with the score. Its four values are **Cold (0-20)**, **Warm (21-40)**, **Hot (41-70)** and **Very Hot (71-100)**. The number in brackets is the score range it corresponds to.

> Changing a rule does not rescore the other leads until someone saves a change to them. **Previous Score** always shows 0 and **Created At** is empty: the scheduled action does not fill them in. The module's forms show the values without labels: the list is easier to read than the form.

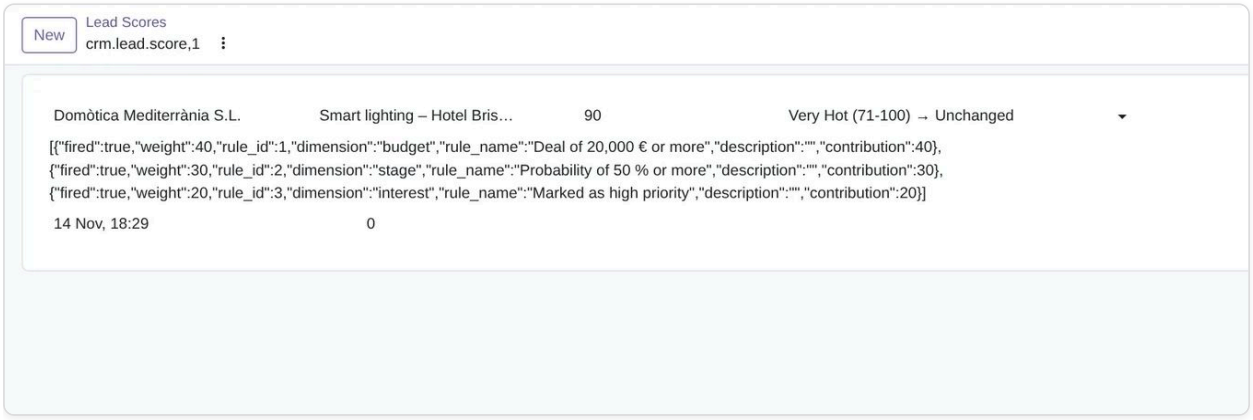
When scoring happens

Each night, the scheduled action **CRM Intelligence: Compute Lead Scores** scores the leads that were never scored and those that someone changed in the last 24 hours. When a lead is created, its score record is created at 0 until the next computation. If you change a rule, the other leads are not rescored until they are touched.

To score straight away, an administrator clicks **Run all now** in **CRM Intelligence › Configuration**. It scores the same leads as the overnight task and also runs the forecast, churn risk and recommendations. If you are not an administrator, Odoo replies: «Only an administrator can run the CRM Intelligence jobs.»

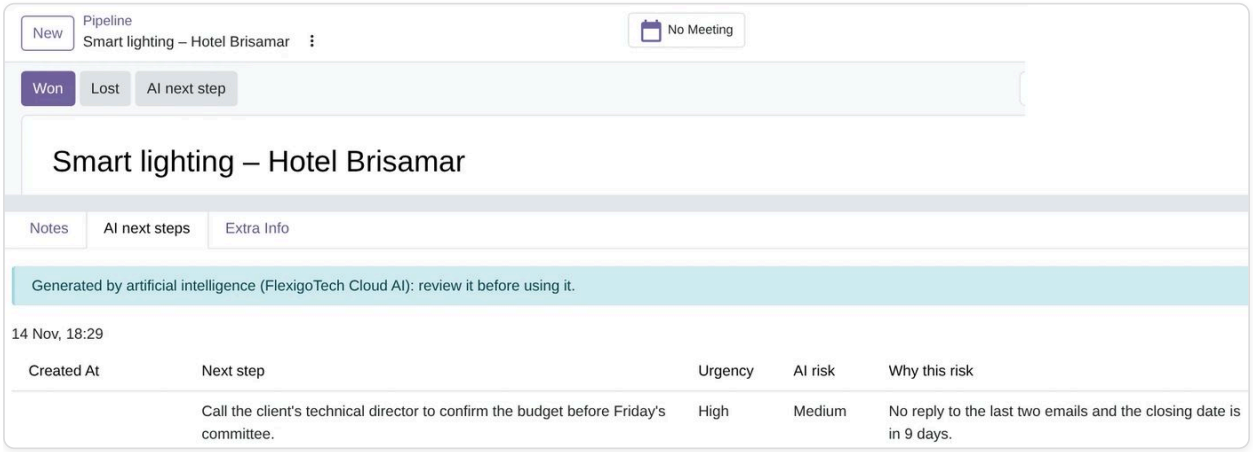
An end-to-end example

In the record screenshot, the score is **Very Hot (71-100)** and the detail in **Rules Fired** lists three rules that are met. Each rule contributes its points and the score is the sum of the three, within the range of the **Very Hot (71-100)** label.



- **Real Odoo 20 screenshot.** The record of a score labelled **Very Hot (71-100)** and its rules met.

9 The next step with FlexigoTech Cloud's AI



- **Real Odoo 20 screenshot.** Opportunity with **AI next step** in the control bar and the **AI next steps** tab showing the result.

Where each piece of data comes from

- With the **AI next step** button on the opportunity: the text goes to FlexigoTech Cloud as a job and the reply comes back in a minute or two.
- Each night, for opportunities that are new or changed since their last next step: 8 per night by default.
- While a job is pending, the scheduled action **CRM Intelligence: Collect FlexigoTech Cloud AI next steps** checks every 2 minutes. You can also check yourself with **Check AI next step**.

Buttons

AI next step	Sends the opportunity to FlexigoTech Cloud. It is hidden while a next step is on its way.
Check AI next step	Asks for the answer straight away. Only appears while a next step is on its way.
Dismiss	On the recommendation, marks it as dismissed: it stays in the list, but no longer counts toward the Monday summary. It is hidden once it is already dismissed.

What comes back

The next step, its **Urgency**, the **AI risk** with **Why this risk** and a **Follow-up draft** come back. They appear in the **AI next steps** tab and in **CRM Intelligence › Recommendations**, marked as AI-generated. The previous one is set aside, not deleted.

> Without a FlexigoTech Cloud subscription or its 14-day trial, the button sends nothing and the opportunity says why. Opportunities excluded from profiling or marked as whistleblower do not appear either. If FlexigoTech Cloud cannot reply, the opportunity says so in a note and nothing changes.

What can happen with a next step

CASE	WHAT IT MEANS
Not requested	The opportunity has no AI next step yet. **AI next step** is shown.

CASE	WHAT IT MEANS
On its way	The text has already been sent to FlexigoTech Cloud. **Check AI next step** is shown and **AI next step** is hidden.
Received	The result is kept in the **AI next steps** tab and in **CRM Intelligence › Recommendations**. The previous one is set aside, not deleted.
Failed	The opportunity says so in a note and nothing changes.
Lost by the cloud	If FlexigoTech Cloud no longer has the job, it is sent again, once only.
Dismissed	Someone clicked **Dismiss** on the recommendation, so it no longer counts as open.

When nothing is sent

- Without the FlexigoTech Cloud subscription or its 14-day trial. The trial is started on the production database, not on a staging copy or a database with demonstration data, from Settings › FlexigoTech Cloud.
- Until an administrator clicks **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration**. Who accepted it and when is recorded, and **Withdraw** removes it.
- With opportunities marked **Opt Out Profiling**, including when another opportunity for the same customer or with the same email has that mark.
- With opportunities marked **Is Whistleblower**. Both marks are set in **CRM Intelligence › Lead Privacy**.

Where it runs and what it costs

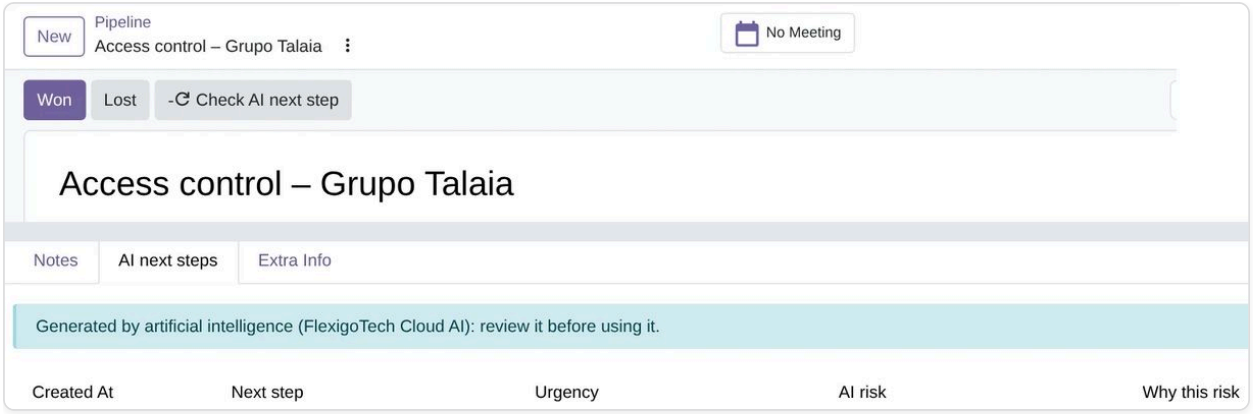
It runs on FlexigoTech Cloud, on our own Netcup server in Germany, using an open-weight model and no other AI provider. The input is held in memory for up to 45 minutes and the response for up to 1 hour. After that no text is stored, only usage counters. Each AI next step uses one document of the month: 500 per month per production database on the Standard plan, 1,000 on Pro and 20 on a test database.

Record fields

Last AI next step	When the AI last proposed the next step for this opportunity.
Generated by AI	Recommendation flag: review it before you use it.
AI risk	**Low**, **Medium** or **High**.
AI model and **Instructions version**	The model and instructions that generated it.

An example

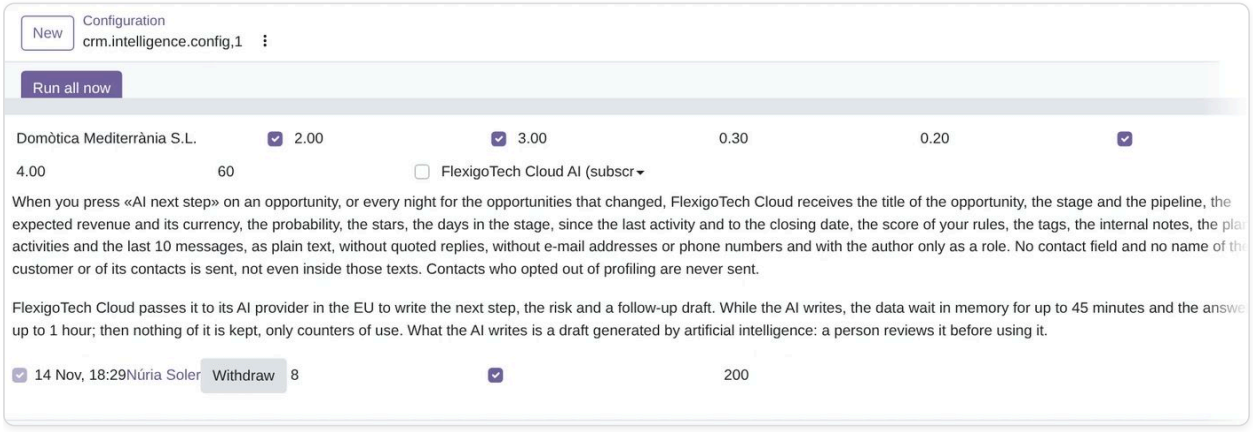
On the Hotel Brisamar smart lighting opportunity, with an expected revenue of €38,500.00 and a forecast close on 23 Nov, the **AI next steps** tab shows, generated on 14 Nov at 18:36, the next step: call the customer's technical director to confirm the budget before Friday's committee. In **CRM Intelligence › Recommendations** it appears with urgency **High** and risk **Medium**, because the last two emails have had no reply and the deal closes in 9 days. It includes a follow-up draft to send.



- **Real Odoo 20 screenshot.** Opportunity with **Check AI next step** while the next step is being generated.

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10 What the AI receives and who accepts it



- **Real Odoo 20 screenshot.** The **Configuration** screen with the text of what the AI receives.

What comes out of each opportunity

The exact text is on the **Configuration** form, under **What FlexigoTech Cloud AI receives**. It covers the title, stage and pipeline, expected revenue and its currency, probability, stars, days in stage, days since last activity and until close, the score from your rules, tags, internal notes, scheduled activities and the last 10 messages. Messages are sent as plain text, without quoted replies, and the author only as a role. Email addresses, phone numbers and websites are not sent, nor the names of the customer and its contacts. Each request carries up to 8,000 characters.

Buttons and permission data

Accept and switch on FlexigoTech Cloud AI	Only visible to an administrator, with the provider set to **FlexigoTech Cloud AI (subscription, no key needed)** and while the permission has not been granted.
Withdraw	Only visible to an administrator and only when the permission has been granted. It removes the permission.
FlexigoTech Cloud AI accepted	Read-only checkbox: shows whether the permission has been granted.
Accepted on and **Accepted by**	Who accepted it and when. Both are read-only.

AI next steps per night	How many changed opportunities the nightly task sends. The default is 8.

States

- Not accepted: no opportunity is sent to the cloud, and **Accept and switch on FlexigoTech Cloud AI** is shown.
- Accepted: who and when are recorded, and **Withdraw** is shown.

Accepting the AI

1. **Sign in as an administrator and open CRM Intelligence › Configuration**
   Open the configuration record for your company.
2. **Read What FlexigoTech Cloud AI receives**
   This is the exact text of what leaves each opportunity.
3. **Click Accept and switch on FlexigoTech Cloud AI**
   Accepted by and **Accepted on** are recorded. To withdraw it, click **Withdraw**.

What never leaves

Opportunities marked **Opt Out Profiling** are not sent, including when another opportunity for the same customer or with the same email has that mark. Those marked **Is Whistleblower** are not sent either. Both marks are set in **CRM Intelligence › Lead Privacy**.

> Only an administrator can accept or withdraw the permission. Another user sees the error "Only an administrator can accept or withdraw what FlexigoTech Cloud AI receives."

Who can change the permission

If someone who is not an administrator tries to accept or withdraw, they see "Only an administrator can accept or withdraw what FlexigoTech Cloud AI receives." The same happens if someone tries to change the company of an accepted configuration: moving it to another company would treat as accepted something nobody accepted there. That is why a change of company also requires being an administrator.

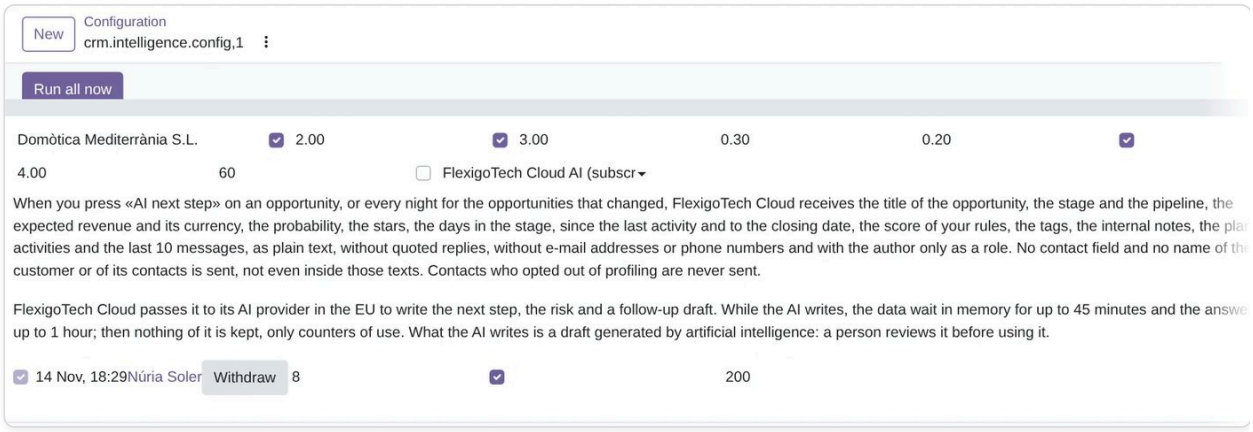
To get a company's configuration you must be an internal user of that company. Otherwise you will see «Only an internal user can get the CRM Intelligence configuration of one of his companies.»

What else is needed for anything to be sent

The permission alone is not enough. Without the FlexigoTech Cloud subscription or its 14-day trial, the AI next step is not sent: the button sends nothing and the opportunity says why. The trial starts on the production database, not on a staging copy or a database with demonstration data, from **Settings › FlexigoTech Cloud**.

End-to-end example

1. **An administrator opens CRM Intelligence › Configuration**
   The permission is not accepted and the **Accept and switch on FlexigoTech Cloud AI** button is visible.



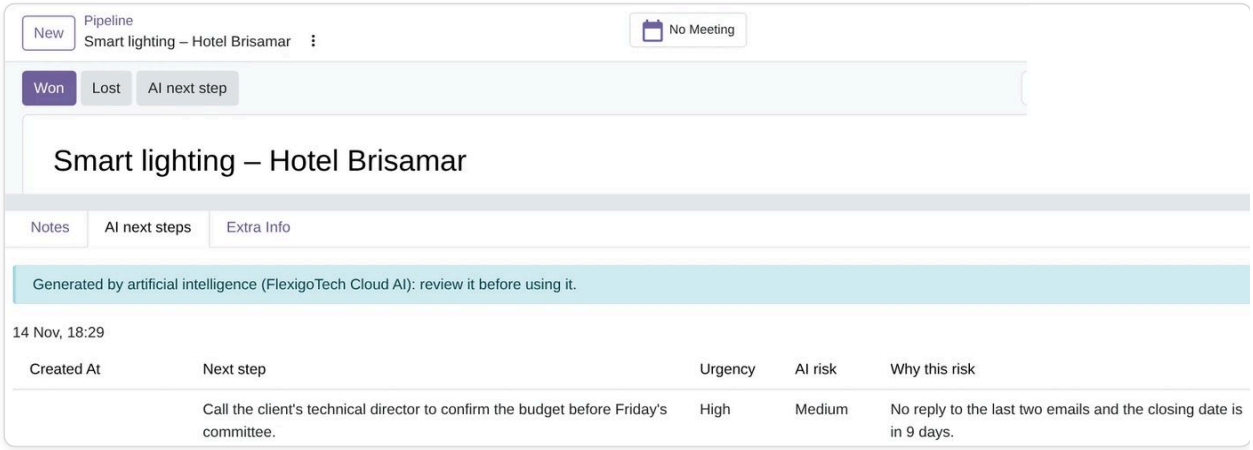
- **Real Odoo 20 screenshot.** The **Configuration** screen with the text of what the AI receives.

2 **They accept it**

Who and when are recorded, and the button becomes **Withdraw**.

3 **Opens an opportunity**

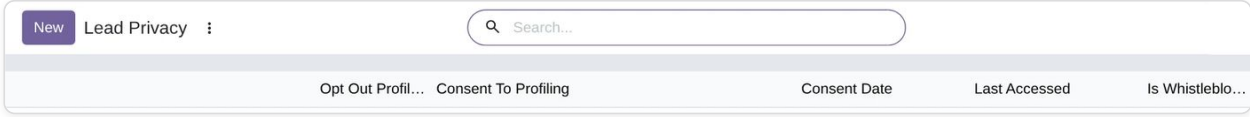
Click **AI next step**. The opportunity «Smart lighting - Hotel Brisamar» shows the next step and the urgency, and carries the notice «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.»



- **Real Odoo 20 screenshot.** The **AI next steps** tab of the opportunity.

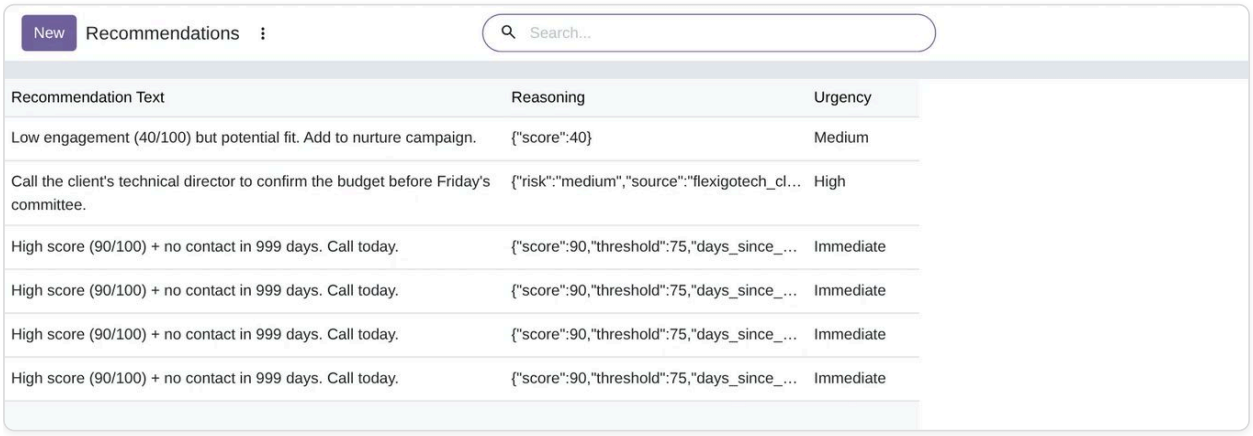
4 **The permission is withdrawn if needed**

With **Withdraw**, nothing more is sent. If an opportunity has **Opt Out Profiling** or **Is Whistleblower**, it was never sent.



- **Real Odoo 20 screenshot.** The marks in **Lead Privacy**.

11 Rule-based recommendations and the Monday summary



- **Real Odoo 20 screenshot.** The **Recommendations** list with the action type, text, reasoning and urgency of each one.

Where they come from

Rule-based recommendations are generated by the scheduled task **CRM Intelligence: Refresh Recommendations**, which runs every night. To run them immediately, an administrator clicks **Run all now**. Depending on the lead score band, you get **Call Today**, **Send Demo**, **Add to Nurture Drip** or **Disqualify**. Their text is in English in every language.

Those from **AI next step** arrive from the button of the same name on the opportunity or from the nightly task. They are marked **Generated by AI** and carry the notice «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.»

To open the list, go to **CRM Intelligence › Recommendations**.

Recommendation fields

Lead	The opportunity it refers to.
Action Type	**Call Today**, **Send Demo**, **Add to Nurture Drip**, **Disqualify** or **AI next step**.
Recommendation Text	The explanation of the recommendation.
Reasoning	The why, shown as raw data.
Urgency	**Immediate**, **High**, **Medium** or **Low**.
AI risk	AI recommendations only: **Low**, **Medium** or **High**.
Why this risk	AI recommendations only: the reason for the risk.
Follow-up draft	AI recommendations only: a follow-up text to review.
Dismiss	Button that marks it as dismissed.

States

A recommendation stays open until someone dismisses it. Clicking **Dismiss** marks it as **Is Dismissed**, with **Dismissed By User** and **Dismissed At**. That button is no longer shown on a dismissed recommendation.

Monday summary

Every Monday, the **CRM Intelligence: Weekly Digest** task sends an email to the sales managers, or to the recipients you choose in **CRM Intelligence › Configuration**. It lists the open recommendations from the last 7 days, with the AI ones marked. It is enabled by default.

> The **Reassign to Inside Sales** recommendation is in the list of types, but the module never generates it. You cannot change the text of rule-based recommendations: they are in English.

Score bands and what each one produces

LEAD SCORE	RECOMMENDATION	EXTRA CONDITION
75 or more	**Call Today** with immediate urgency	5 days or more without contact
50 to 74	**Send Demo**	None
30 to 49	**Add to Nurture Drip**	None
20 to 29	None	No recommendation shows up
Below 20	**Disqualify**	Lead created more than 90 days ago

The module does not repeat a recommendation that is already open for that lead. If you dismiss it and the lead stays in the same band, it will appear again the following night.

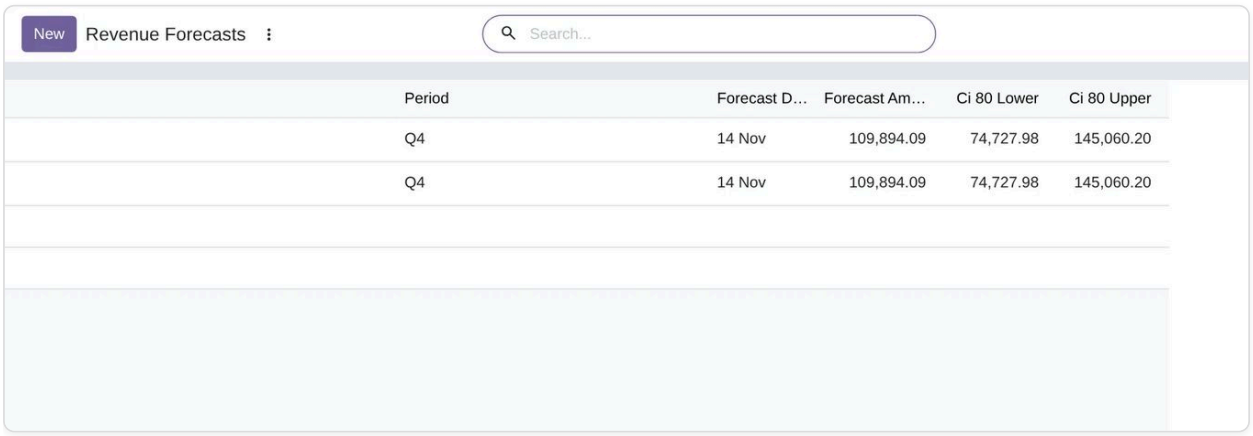
> Nobody fills in the last activity date. That is why every lead scoring 75 or above shows **Call Today** with 999 days without contact. Treat it as a priority hint, not as a real count of days.

An end-to-end example

In **CRM Intelligence › Recommendations** there is one for **Add to Nurture Drip** on the lead "Climate control - Residència Les Oliveres", with urgency **Medium** and the text "Low engagement (40/100) but potential fit. Add to nurture campaign.". It falls in the 30 to 49 band. For "Access control - Grupo Talaia" it shows **Call Today**, with English text that mentions 90 points out of 100 and 999 days without contact.

For "Smart lighting - Hotel Brisamar" there is an **AI next step** recommendation with urgency **High**: "Call the client's technical director to confirm the budget before Friday's committee.". It carries risk **Medium**, the reason and a follow-up draft. You review it and, if it doesn't work for you, you click **Dismiss**. The following Monday, any that are still open from the last 7 days are sent in the email to the sales managers.

12 The revenue forecast



- **Real Odoo 20 screenshot.** The **Revenue Forecasts** list with the forecast amount and the margins **Ci 80 Lower** and **Ci 80 Upper**.

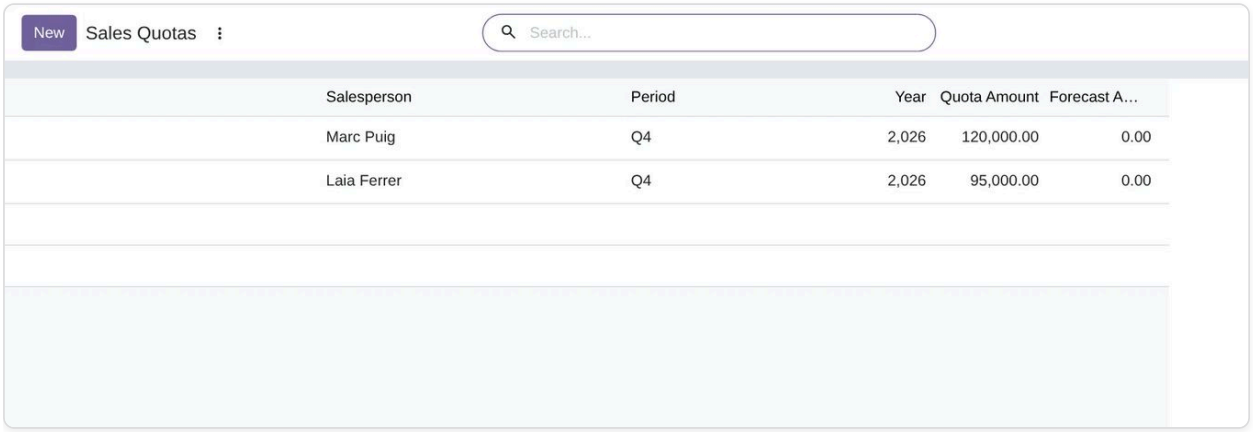
You are in **CRM Intelligence › Revenue Forecasts**. Each night the module adds a new row, with the current quarter in **Period**. It adds up the expected revenue of all open opportunities, whenever they close, multiplied by their probability and by the close rate of their stage, and deducts those that have been stuck in the stage for more than 30 days.

The margins **Ci 80 Lower**, **Ci 80 Upper**, **Ci 95 Lower** and **Ci 95 Upper** are a fixed margin around the forecast amount, not a statistical calculation.

Record buttons

Compute actual	Sales managers only. It calculates what was won in that forecast's period, but this screen does not show the result.

Sales quotas



- **Real Odoo 20 screenshot.** The **Sales Quotas** list with **Quota Amount** and **Forecast Amount**.

In **CRM Intelligence › Sales Quotas** you store, per salesperson, the period (Q1 to Q4), the year and the quota amount. You type the **Forecast Amount** yourself. The **Attainment (%)** and the **Gap Amount** are calculated from that figure.

> The **Forecast Amount** on quotas is not filled in automatically, and the **Actual Amount** always shows 0. On the forecast form, the breakdown by stage and by salesperson appears as raw data.

How the amount is calculated

A stage's close rate comes from history when that stage has 5 or more closed opportunities. Won deals count in every stage they went through. Lost deals count in the stage where they were lost and in the earlier ones. The rate is the won amount divided by the won plus lost amount from that stage onward. With fewer than 5 closed, a starting value is used: 0.20, 0.35 or 0.55 depending on the English name of the stage (New, Qualified or Proposition), and 0.25 if none matches.

The IC 80 and IC 95 margins

They are a fixed margin around the forecast amount, not a statistical interval. With 20 open opportunities or fewer the base margin is 25%, and with more than 20 it is 15%. That margin is multiplied by 1.28 for the 80 and by 1.96 for the 95.

The period

Each row carries in **Period** the quarter of the day it was calculated, from **Q1** to **Q4**. The amount does not look at closing dates: it adds up the whole open pipeline.

What the record shows

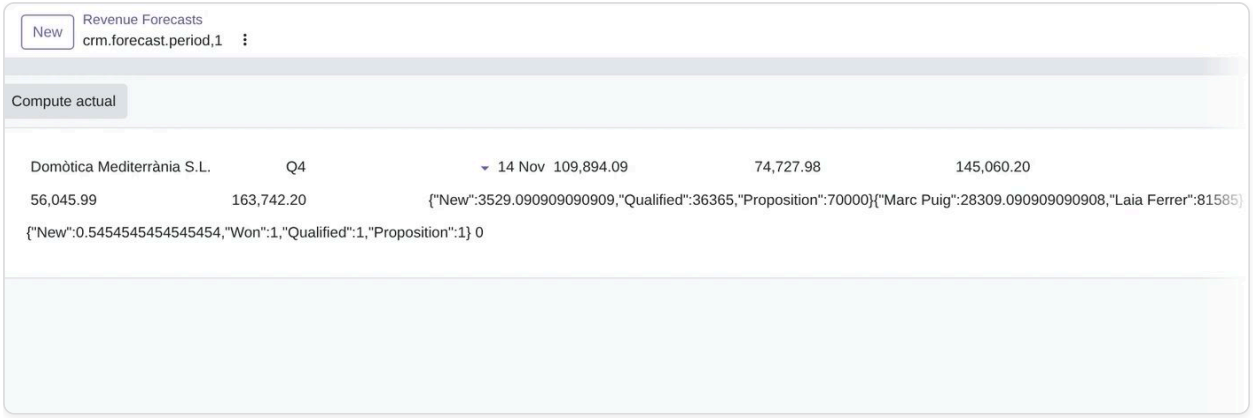
Company	The Odoo company the forecast belongs to. It fills in automatically with yours.
Forecast Date	The day it was generated.
Forecast By Stage and **Forecast By Rep**	The breakdowns appear as raw data. The forecast by salesperson is only visible to users with access to all leads.
Close Rate By Stage	The rate of each stage used in the calculation, also as raw data.
Avg Cycle Time Days	Always shows 0: no calculation fills it in.

When it won't let you do something

- **Compute actual** only appears for sales managers.
- What **Compute actual** calculates does not appear on any screen in the module.
- On quotas, the **Actual Amount** always shows 0.
- On quotas, the **Forecast Amount** is not written by any calculation: you enter it. Without it, the **Attainment (%)** and the **Gap Amount** tell you nothing.

An end-to-end example

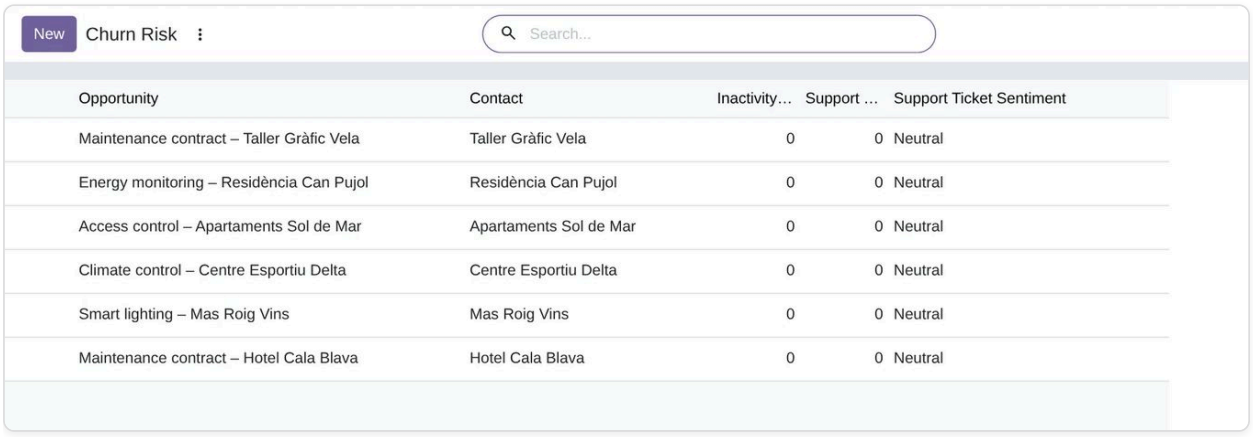
In the forecast list there are two rows for the **Q4** period, dated 14 Nov, forecast amount 109,894.09, **Ci 80 Lower** 74,727.98 and **Ci 80 Upper** 145,060.20. On the form of one of them, the forecast by stage and by salesperson appears as raw data. In quotas, salesperson Marc Puig has a 120,000.00 quota in **Q4** 2026 and Laia Ferrer has 95,000.00. In both, the **Forecast Amount** is at 0.00 because nobody has entered it yet.



- **Real Odoo 20 screenshot.** The form of a forecast with the **Compute actual** button and the raw breakdown.

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13 The churn risk of each won customer

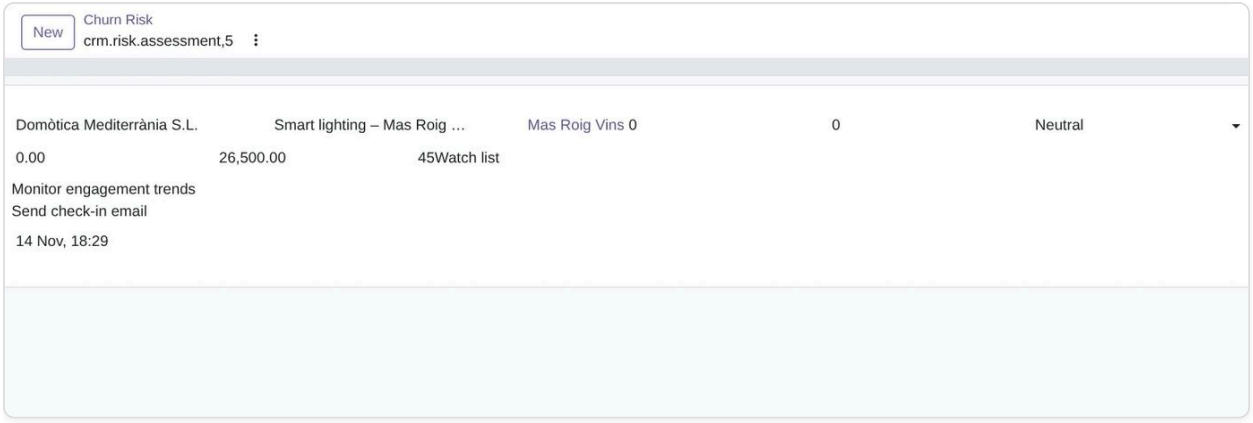


- **Real Odoo 20 screenshot.** The **Churn Risk** list with the inactivity days, the tickets and the sentiment of each won opportunity.

The score starts at 50. The days without touching the opportunity, the Helpdesk tickets, the ticket sentiment, the onboarding and the amount push it up or down. The inactivity days count from the last time someone saved a change to the won opportunity, not from the last contact with the customer.

Where each piece of data comes from

- The inactivity days, the tickets from the last 30 days and the customer value (the opportunity's expected revenue) are calculated by the module. Tickets only count if you have Helpdesk (Enterprise).
- The ticket sentiment and the onboarding completion are not filled in automatically: you enter them by hand on the record.
- The calculation runs daily with the scheduled action **CRM Intelligence: Update Churn Risk Scores** and only looks at won opportunities.
- To calculate it on demand, an administrator clicks **Run all now**.



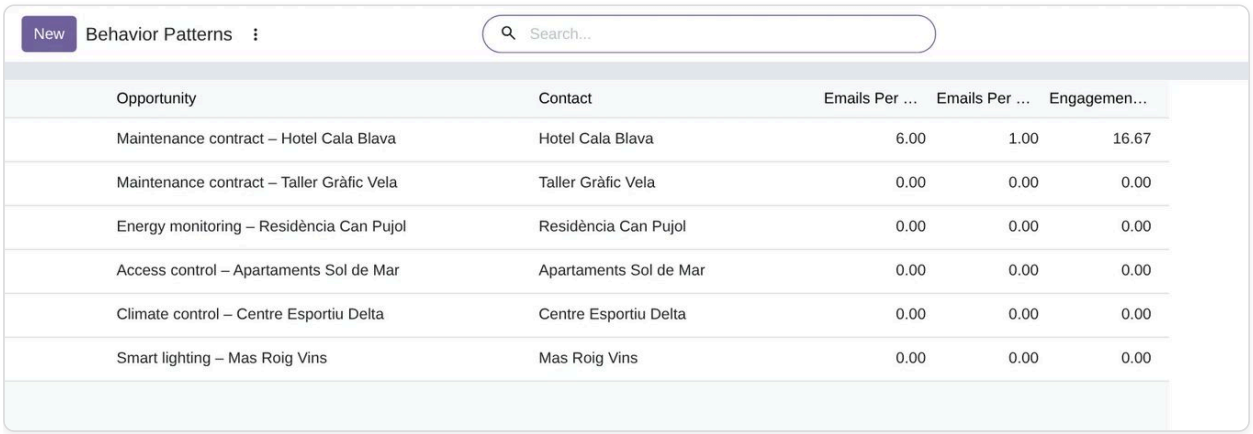
- **Real Odoo 20 screenshot.** The opportunity record with the score, the **Watch list** band and its recommended actions.

The bands

BAND	SCORE	WHAT HAPPENS
At risk	70 or above	Three actions: a quarterly review with the customer, offer a discount or activate more features, and escalate to the account owner.
Watch list	From 40 to 69	Two actions: monitor the interaction and send a follow-up email.
Stable	Below 40	No actions.

Behaviour Patterns

In **CRM Intelligence › Behavior Patterns** you see, per won opportunity, the emails and messages from 150 to 180 days ago and from the last 30, the interaction loss and the factors that have moved the risk. The **Recompute** button can be used by sales managers: salespeople only read the patterns.



- **Real Odoo 20 screenshot.** The **Behavior Patterns** list with the emails per month and the interaction loss.

Recompute	It recounts the messages and recalculates the renewal probability and the expansion potential, with the risk the opportunity already has. Only sales managers can see it.

States

Risk has no workflow states. What changes is the band shown by **Risk Category**: **At risk**, **Watch list** or **Stable**. **Last Computed** tells you when it was last calculated.

> AI does not calculate this risk: the module calculates it with its fixed rules. Sentiment and onboarding are not filled in automatically, so until you enter them by hand they do not enter the score. The screens show values without labels and some columns in JSON.

What adds and what subtracts

The calculation runs daily and only for won opportunities. It starts at 50 and applies these movements.

FACTOR	WHEN	POINTS
Days without changes	From 30 to 59 days	+15
Days without changes	60 days or more	+30
Helpdesk tickets (Enterprise)	From 5 to 7 tickets in 30 days	+10
Helpdesk tickets (Enterprise)	8 tickets or more in 30 days	+25
Ticket sentiment	Negative	+20
Onboarding	90% or more	-10
Amount	Revenue above 5,000	-5

At risk and **Watch list** come with fixed actions, which appear in **Recommended Actions**; **Stable** comes with none. With only what the module calculates, the score does not drop below 45: to reach **Stable** you need to enter by hand an onboarding of 90% or more and for the revenue to exceed 5,000.

What is filled in automatically and what is not

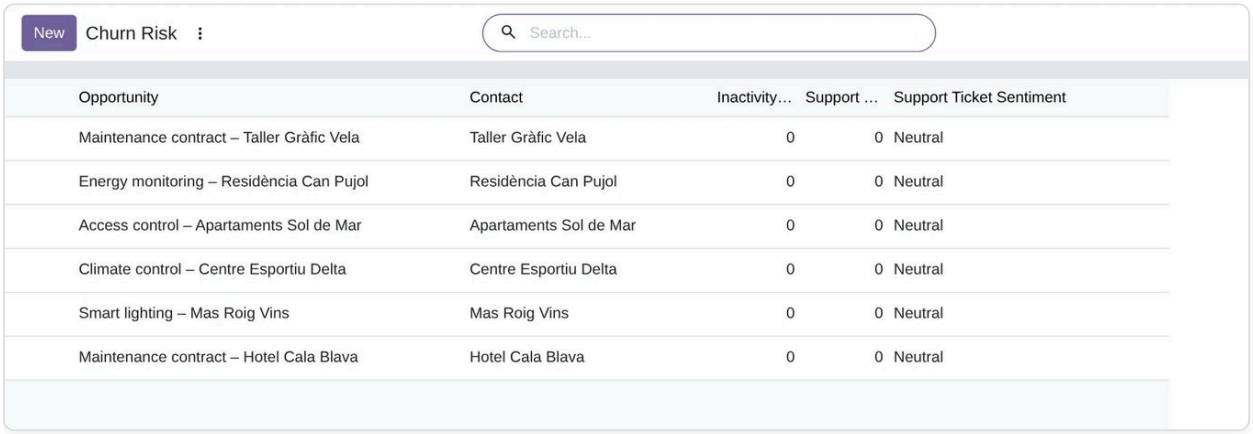
Inactivity Days	Days since the last time someone saved a change to the opportunity. It does not measure the last contact with the customer.
Support Ticket Volume 30D	Only counts with Helpdesk (Enterprise).
Support Ticket Sentiment	Positive, Neutral or Negative. It starts at Neutral and is changed by hand.
Onboarding Completion (%)	It is set by hand.
Ltv	The expected revenue from that won opportunity. It does not add the customer's other sales.
Churn Risk Score	From 0 to 100, calculated.
Last Computed	Date and time of the last calculation.

The behaviour pattern

Each won opportunity also has a behaviour pattern in **CRM Intelligence › Behavior Patterns**. It compares the emails and messages from 150 to 180 days ago with those from the last 30 and works out the **Engagement Decay (%)**. The **Renewal Probability** is 100 minus the churn risk. The **Expansion Potential Score** takes into account whether the customer has another open opportunity, recent engagement and a low risk. The **Churn Factors** show how many points each factor has moved from 50.

An end-to-end example

On the module screens, the Mas Roig Vins opportunity appears on the record with a score of 45 in the **Watch list** band and two actions: monitor the engagement trends and send a follow-up email. In the list, the opportunities shown display their days of inactivity, their tickets and the sentiment as Neutral. Its revenue goes from 5,000 and takes off 5 points: 45 is the minimum the module gives on its own. To move to **Stable**, whoever keeps the account would have to set onboarding to 90% or more by hand; on saving it, the score drops to 35.

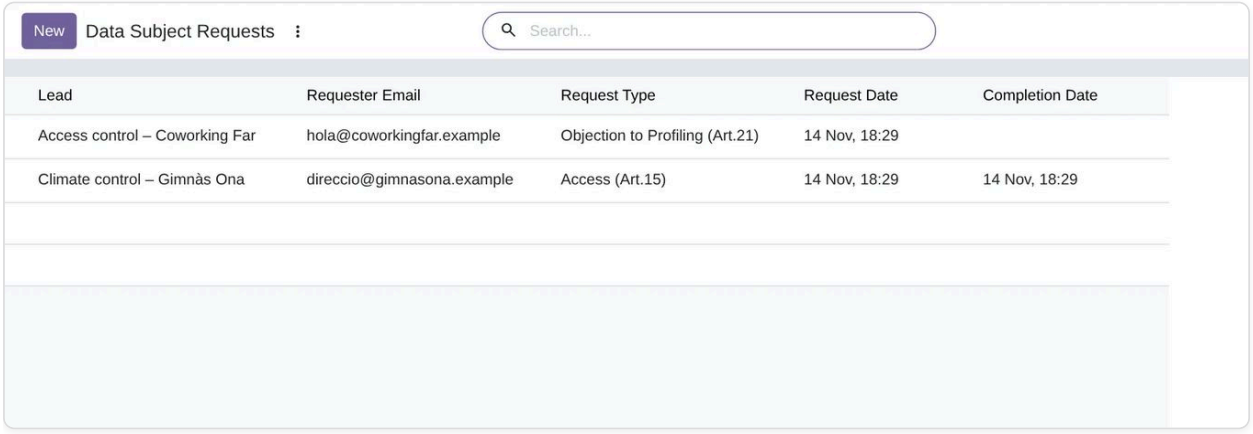


- **Real Odoo 20 screenshot.** The **Churn Risk** list with the won opportunities.

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14 GDPR requests and the audit log

Requests are in **CRM Intelligence › Data Subject Requests**. A sales manager creates them by hand: there is no portal for the data subject. Each request is handled with the button that matches its type. Only sales managers can see and press them.



- **Real Odoo 20 screenshot.** The data subject request list with the type and dates of each one.

The request buttons

Export Data	For access and portability. Generates a JSON file with the name, email, phone, company and opportunity stage, its scores, its recommendations and its audit log, and saves it in **Exported Data**.
Erase Personal Data	For erasure. Anonymises the opportunity and deletes its messages, attachments, activities and intelligence data. From the contact it deletes the email, phone, website, job title and notes; if it has invoices, it keeps the name, tax ID and address that the law requires.

Stop Profiling	For objection. Marks the opportunity with **Opt Out Profiling**.
Correct Contact Data	For correction. Opens the contact so you can correct it by hand and records who opened it and when.

Each button only appears when the request is of the type it belongs to and it is **Pending**.

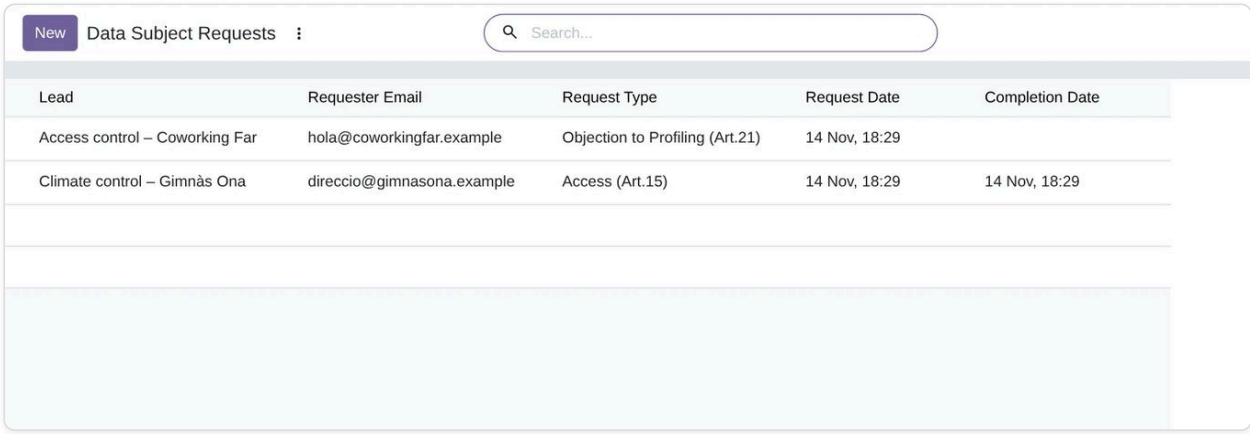
Statuses

- **Pending**: the request is registered and unresolved.
- **In Progress**: the erasure did not touch the contact because it is a company, has a user or has its own contacts. Review it by hand and move the request to **Completed**.
- **Completed**: resolved.
- **Completed (invoice data kept by law)**: the erasure was carried out and the invoice data was kept.
- **Denied**: it was rejected, with the legal basis in **Reason Denied**. It is set automatically if access is requested for an opportunity marked **Is Whistleblower** using its contact's email.

Steps

1 **Open the list**

Go to **CRM Intelligence › Data Subject Requests** and press **New**.



- **Real Odoo 20 screenshot.** The data subject request list.

2 **Fill in the request**

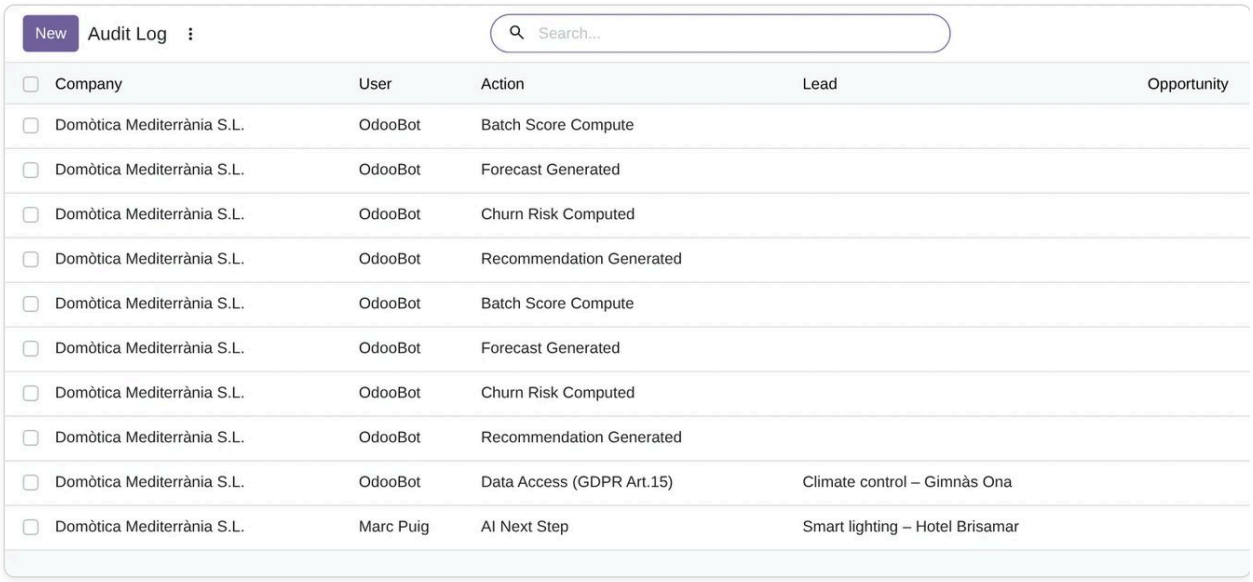
Choose the **Lead**, enter the **Requester Email** and the **Request Type**.

3 **Press the button for the type**

The action runs and the request moves to **Completed**, or to **In Progress** if the erasure leaves the contact for review. Note anything needed in **Notes**.

4 **Check the log**

The action is recorded in **CRM Intelligence › Audit Log**.



- **Real Odoo 20 screenshot.** The audit log with the action and the user for each calculation.

> If you are not a sales manager, Odoo warns you with «Only a Sales Administrator can process data subject requests.». Audit records cannot be changed or deleted.

Rules and conditions

- Only a sales manager can process requests. If any other user tries, Odoo shows «Only a Sales Administrator can process data subject requests.».
- **Export Data** serves the types **Access (Art.15)** and **Portability (Art.20)**. **Erase Personal Data** is only for **Deletion (Art.17)**, **Stop Profiling** for objection, and **Correct Contact Data** for correction.
- The buttons disappear once the request is no longer **Pending**.
- If the contact has invoices or other accounting entries, the erasure keeps the name, tax ID and address. Without the accounting application there are no invoices to keep.
- The erasure leaves the opportunity as an anonymous record: it empties its personal data, cuts the link to the contact and deletes its messages, attachments, activities, earlier exports and intelligence data.
- The correction does not include what to correct: it opens the opportunity's contact (the opportunity itself if it has no contact) so you can correct it by hand. It records who opened it and when, and the request becomes completed.
- Audit log entries cannot be modified or deleted. Odoo replies "Audit logs are immutable and cannot be modified." or "Audit logs are immutable and cannot be deleted.", in English.
- Each day, the scores and recommendations that have gone more than 24 months without change are deleted. This period cannot be changed from the screen.

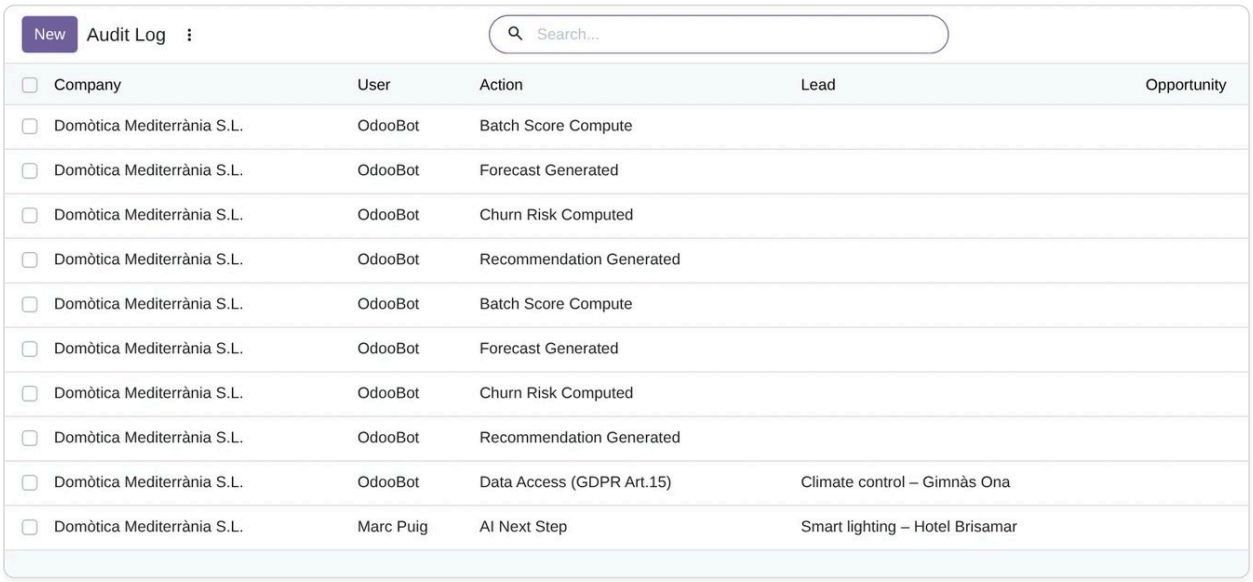
Request fields

Company	The company the request belongs to.
Lead	The opportunity the request is about. It is required.
Requester Email	The email of the person making the request.

Request Type	**Access (Art.15)**, **Deletion (Art.17)**, **Portability (Art.20)**, **Correction (Art.16)** or **Objection to Profiling (Art.21)**.
Request Date	It is set automatically when created and cannot be edited.
Completion Date	Cannot be edited.
Exported Data	The JSON file, which is downloaded as crm_intelligence_export.json.
Notes	Internal processing notes.

The audit log

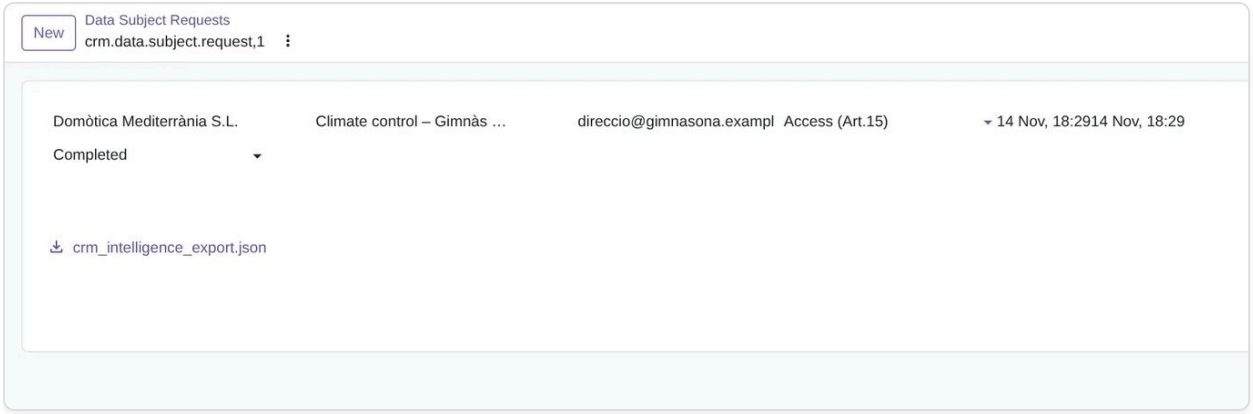
In **CRM Intelligence › Audit Log** the record shows what was done and who did it. Each line has **Company**, **User**, **Action**, **Lead** or **Opportunity**, **Input Data**, **Output Data** and **Notes**, and for the AI next steps, the **Model Used**. The **Timestamp** column is left empty: the module does not fill it in. It is read by sales managers. The actions include **Data Access (GDPR Art.15)**, **Data Deletion (GDPR Art.17)**, **Data Correction (GDPR Art.16)** and **Lead Opt-out Set**, as well as the scoring, forecast, risk and recommendation calculations. If the record concerns a lead, it is logged under that lead's company.



- **Real Odoo 20 screenshot.** The audit log with the **User** and **Action** columns.

An end-to-end example

In the list there is a request of type **Access (Art.15)** on the opportunity "Climate control - Gimnàs Ona". It is completed and has a completion date. Its export file is called crm_intelligence_export.json. The audit log shows the action **Data Access (GDPR Art.15)** for that opportunity. Another request, on "Access control - Coworking Far", is **Objection to Profiling (Art.21)** and still has no completion date.



- **Real Odoo 20 screenshot.** The detail of a request showing the creation and completion dates.

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15 The data that goes and comes back

DATA	DIRECTION	WHEN
Opportunity title, stage and pipeline	From your Odoo to FlexigoTech Cloud	When pressing **AI next step**, or each night for new opportunities or ones changed since their last next step.
Expected revenue and its currency, probability and stars	From your Odoo to FlexigoTech Cloud	As above.
Days in stage, since the last activity and until closing	From your Odoo to FlexigoTech Cloud	As above.
Score from your rules and tags	From your Odoo to FlexigoTech Cloud	As above.
Internal notes and planned activities	From your Odoo to FlexigoTech Cloud	As above.
The last 10 messages, in plain text, without quoted replies and with the author shown only as a role	From your Odoo to FlexigoTech Cloud	As above, up to 8,000 characters per request.
Next step and its urgency	From FlexigoTech Cloud to your Odoo	Collected by the task that runs every 2 minutes or by the **Check AI next step** button, which appears while one is pending.
Risk (low, medium or high) with its reasoning	From FlexigoTech Cloud to your Odoo	As above.
Follow-up draft and the model that replied	From FlexigoTech Cloud to your Odoo	As above.

At night, the new opportunities or those changed since their last next step are processed, up to the number of **AI next steps per night** in **CRM Intelligence › Configuration**. By default it is 8. The result comes back in a minute or two and is kept on the opportunity's **AI next steps** tab and in **CRM Intelligence › Recommendations**, marked as generated by artificial intelligence.

FlexigoTech Cloud's AI runs on our own Netcup server in Germany, with an open-weights model and no other AI provider. It does not store any text: only usage counters. Emails, phone numbers and websites are never sent.

Customer and contact names are not sent either, nor any contact field. Opportunities marked **Opt Out Profiling** and those marked **Is Whistleblower** are not sent. No opportunity is sent until an administrator presses **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration**; **Withdraw** removes it.

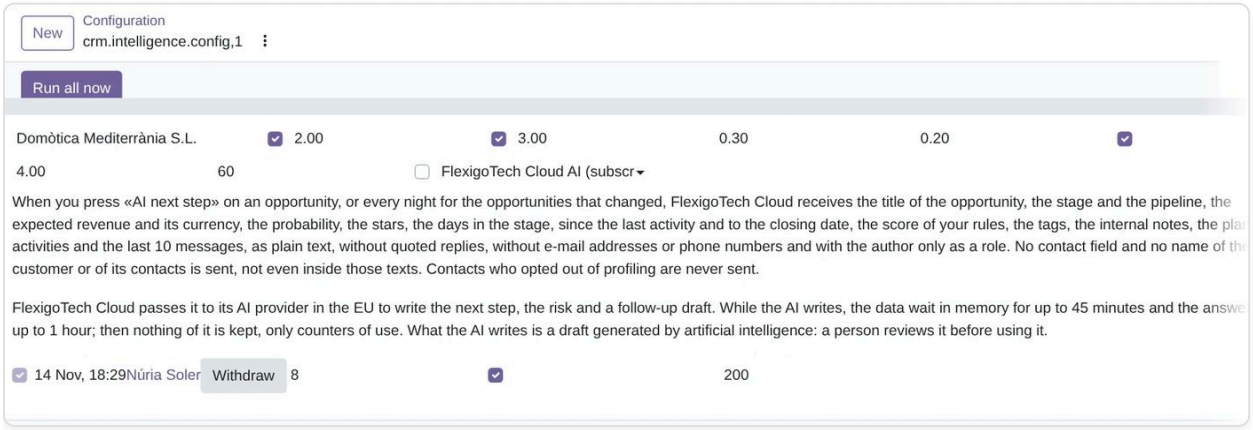
The lead scoring rules and scores, forecasts, churn risk, rule-based recommendations, sales quotas, GDPR requests and the audit log are calculated and stored in your Odoo, and are not sent to FlexigoTech Cloud. The score is the sum of the points from your rules and is not calculated by the AI.

16 What happens on its own

TASK	FREQUENCY	WHAT IT DOES
CRM Intelligence: Compute Lead Scores	Daily, enabled	Scores the leads that have never been scored and those that someone changed in the last 24 hours.
CRM Intelligence: Generate Forecasts	Daily, enabled	Adds a new revenue forecast row.
CRM Intelligence: Update Churn Risk Scores	Daily, enabled	Recalculates the risk of the won opportunities.
CRM Intelligence: Refresh Recommendations	Daily, enabled	Generates the rule-based recommendations and starts sending that night's opportunities to the AI.
CRM Intelligence: Data Purge Job	Daily, enabled	Deletes the scores and recommendations that have gone more than 24 months without changes.
CRM Intelligence: Weekly Digest	Weekly, enabled	Sends the open recommendations summary every Monday.
CRM Intelligence: Collect FlexigoTech Cloud AI next steps	Every 2 minutes, enabled	Collects the AI responses that are already ready and sends the remaining opportunities for that night.

The frequencies are changed in **Settings › Technical › Automation › Scheduled Actions**, with developer mode activated. All the tasks come enabled.

17 The module options and their defaults



- **Real Odoo 20 screenshot.** The **Configuration** screen with the **Run all now** button.

OPTION	DEFAULT	WHAT IT DOES
Enable Lead Scoring	Enabled	Disabled, no lead gets scored, not even with **Run all now**.
Enable Forecasting	Enabled	Disabled, the forecast is not calculated.
Enable Churn Detection	Enabled	Disabled, the churn risk is not calculated.
Discount Rate Stalled	0.2	Number between 0 and 1: discount applied in the forecast to opportunities that have been over 30 days in the stage.
Batch Size	200	Leads processed per batch in the scoring, churn risk and recommendation calculations.
Send Weekly Digest	Enabled	Every Monday it sends an email with the open recommendations from the last 7 days.
Digest Recipients	Empty	You choose the users who receive the digest. If empty, the sales managers of the company receive it.
AI next steps per night	8	How many changed opportunities the module sends each night to the FlexigoTech Cloud AI. Each one uses one document of the month.
Ai Provider	FlexigoTech Cloud AI	It is left like this: with another option, no next step is requested.

With the FlexigoTech Cloud AI, an administrator presses **Accept and switch on FlexigoTech Cloud AI** and no opportunity goes out to the cloud until then. It is recorded who accepted it and when, and **Withdraw** removes it.

They appear on the screen but do nothing: **Scoring Schedule Time**, **Forecast Schedule Time**, **Churn Schedule Time**, **Default Close Rate**, **Inactivity Threshold Days** and **Enable Ai Scoring**. The time of each calculation is set by the scheduled task, the forecast uses the close rates of each stage and the scoring is always the sum of your rules.

What is done by hand

SCREEN	BUTTONS
Opportunity	**AI next step**, which sends its text to FlexigoTech Cloud. **Check AI next step**, which only appears while one is pending and collects the response.
Configuration	**Run all now** does right now what happens each night; **Accept and switch on FlexigoTech Cloud AI** and **Withdraw**. All three are for administrators only.
Revenue forecast	**Compute actual**, by the sales managers: calculates what was won in the period, but the screen does not show it.
Recommendation	**Dismiss**.
Behaviour pattern	**Recompute**, by the sales managers: recounts the messages and recalculates the renewal probability and the expansion potential.
Metrics	**Take snapshot**, in the list: adds a row with how many leads have a score and how many have the sector and activities.
Data subject request	Depending on the type: **Export Data** (access and portability), **Erase Personal Data**, **Stop Profiling** and **Correct Contact Data**.

What is written by hand:

- The scoring rules: you create them, with the lead field, the operator, the threshold value and the points. The score is the sum of the points of the rules that are met.
- The planned amount of the sales quotas: you set it, and the actual amount always shows 0.
- The sentiment of the tickets and the customer onboarding in the churn risk: you set them. Tickets only count with Helpdesk (Enterprise).
- The **Opt Out Profiling** and **Is Whistleblower** flags, in **CRM Intelligence › Lead Privacy**: an opportunity with either of the two is not sent to the FlexigoTech Cloud AI.

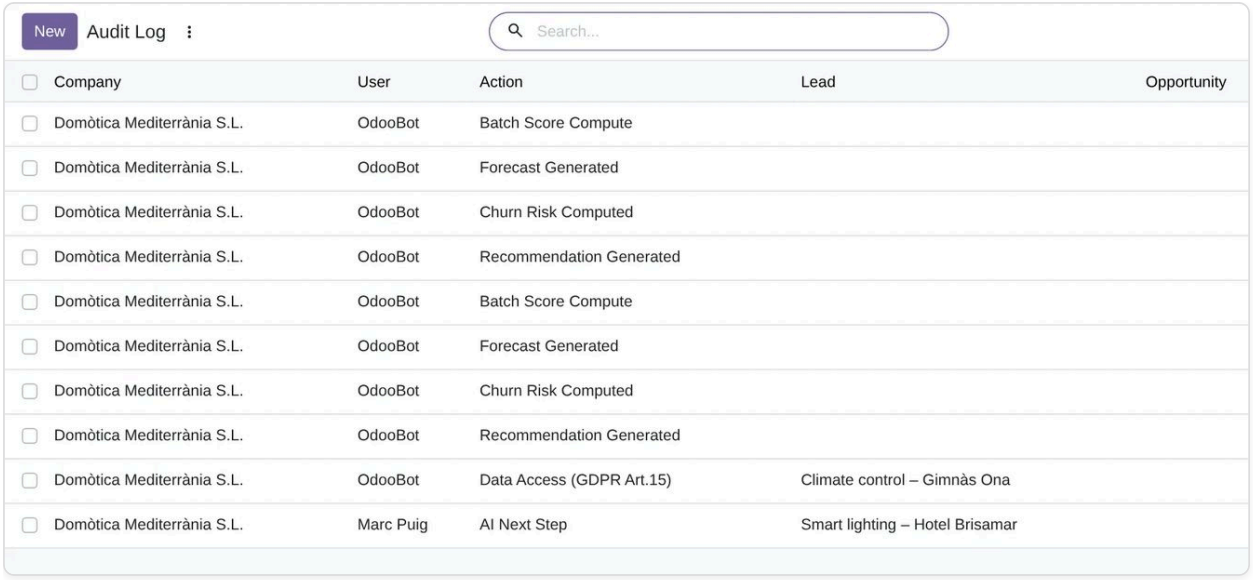
18 Security and personal data

- An administrator is the one who grants and withdraws permission for the AI. Click **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration** and a record is kept of who accepted and when. **Withdraw** removes it. If someone who is not an administrator tries to accept or withdraw, Odoo replies «Only an administrator can accept or withdraw what FlexigoTech Cloud AI receives.».
- Until an administrator accepts it, no opportunity goes out to FlexigoTech Cloud.
- A sales manager handles the data subject requests. They create them by hand in **CRM Intelligence › Data Subject Requests**: there is no portal for the data subject. Each type of request has its button: **Export Data**, **Erase Personal Data**, **Stop Profiling** and **Correct Contact Data**.
- For each opportunity, the AI receives the title, the stage and the pipeline, the expected revenue and its currency, the probability, the stars, the days in the stage, the score from your rules, the tags, the internal notes, the planned activities and the last 10 messages, in plain text and up to 8,000 characters per request.
- No email addresses, phone numbers or websites are sent, nor the names of the customer and its contacts, not even inside free texts. The author of each message is sent only as a role and quoted replies are removed. The exact text you can see in **What FlexigoTech Cloud AI receives**, within the configuration.
- Two flags keep an opportunity out of the AI: **Opt Out Profiling** and **Is Whistleblower**. They are set in **CRM Intelligence › Lead Privacy**. **Stop Profiling**, in a request, sets the first one.
- The profiling exclusion also applies when another opportunity of the same customer or with the same email has it.
- **Erase Personal Data** leaves the opportunity as an anonymous record: it empties its personal data, cuts the link with the contact and deletes its messages, attachments, activities, earlier exports and intelligence data.
- If the contact has invoices, the erasure keeps what the law requires: the name, the tax ID and the address.
- Each day the scores and recommendations that have gone more than 24 months without changes are deleted. The period cannot be changed from the screen.
- The AI runs on FlexigoTech Cloud, on our own Netcup server in Germany, with an open-weights model and no other AI provider. While it is writing, the input waits in memory; afterwards no text is stored, only usage counters.

What is recorded

Each request processed and each run of the calculations are recorded in the audit log, which cannot be changed or deleted. Sales managers read it in **CRM Intelligence › Audit Log**, with the company, the user, the action and the opportunity. The date does not appear: the module does not fill the **Timestamp** column.

Each AI next step also stores the **AI model** that answered and the **Instructions version**. It is marked «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.». The previous next step is set aside, not deleted.



- **Real Odoo 20 screenshot.** The audit log with the company, the user and the action of each calculation and each request.

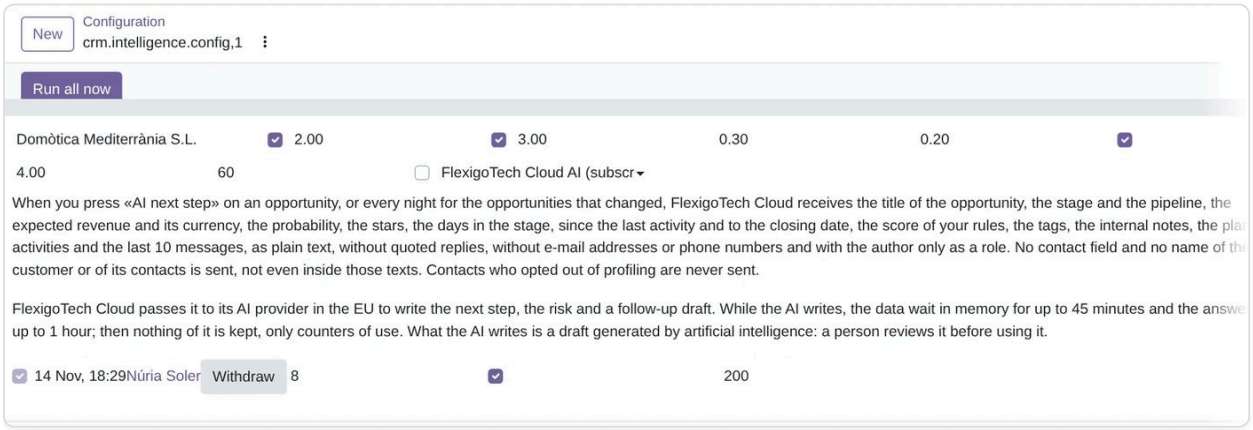
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19 Multiple companies

Each Odoo company works with its own: its configuration, its scoring rules, its scores and its forecasts. Each one needs its record in **CRM Intelligence › Configuration**: without it, the night tasks do not calculate for it. The nightly tasks process the leads of each company separately, and a lead without a company is handled only by the company of its score, so that no company processes it twice.

The AI permission is also per company. An administrator accepts it in the configuration of each one. Changing a configuration from one company to another can only be done by an administrator.

FlexigoTech Cloud counts the monthly documents per production database: 500 with the Standard plan, 1,000 with Pro and 20 on a test database. Each AI next step uses one.



- **Real Odoo 20 screenshot.** The company configuration with **Run all now** and the text of what the AI receives.

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20 If something fails

No score or forecast appears	The company configuration is missing. An administrator creates it in **CRM Intelligence › Configuration** with **New** and then presses **Run all now**.

The AI next step button sends nothing and the opportunity says why	The FlexigoTech Cloud subscription or its 14-day trial is missing. The trial starts on the production database, not on a staging copy or a database with demo data, from **Settings › FlexigoTech Cloud**.
Nothing goes out to the AI	An administrator has to press **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration**. Until they do, no opportunity goes out. If you want to remove it, use **Withdraw**.
The Accept and switch on FlexigoTech Cloud AI button does not appear	It only shows when FlexigoTech has been chosen as the AI provider and the permission has not yet been accepted. With another provider chosen, or with the permission already given, it is hidden.
An opportunity does not generate a next step	Opportunities with **Opt Out Profiling** do not appear, nor do those where another opportunity from the same customer or with the same email has it, nor those marked **Is Whistleblower**. Both flags are visible under **CRM Intelligence › Lead Privacy**.
The AI response is slow	The response arrives within a minute or two. While a next step is pending, **Check AI next step** appears: press it to ask now.
A lead has no new score	Each night only leads that have never been scored and leads that someone changed in the last 24 hours are scored. Changing a rule does not rescore the others. To rescore a lead, save a change to it and wait for the night, or ask an administrator to press **Run all now**.
A rule gives an error when saved	A rule needs its field name and points between 0 and 100.

If FlexigoTech Cloud cannot reply, the opportunity says so in a note and nothing changes. A job the cloud lost is sent again, once only.

Other messages you may see

"Only an administrator can run the CRM Intelligence jobs."	You asked without being an administrator. **Run all now** is started by an administrator.
«Only an administrator can accept or withdraw what FlexigoTech Cloud AI receives.»	Ask an administrator to accept or withdraw the permission under **CRM Intelligence › Configuration**.
«Only a Sales Administrator can process data subject requests.»	Data subject requests are handled by a sales manager. Ask them.
«Only an internal user can get the CRM Intelligence configuration of one of his companies.»	Sign in with an internal user who has access to that company.
"Audit logs are immutable and cannot be deleted."	The audit log is never deleted.
"Audit logs are immutable and cannot be modified."	The audit log is never changed.
"Rule '...' weight must be 0-100"	Set points between 0 and 100 on that rule and save again. The message appears in English, with the rule's name.

21 Other ways of doing it

METHOD	WHAT IT MEANS
By hand	You look at the pipeline and decide by eye, or keep a separate spreadsheet. Nothing needs installing, but the judgement lives in each salesperson's head or in a file someone has to maintain.
Odoo alone	Odoo 20's CRM calculates an automatic probability for each lead, the predictive lead score, using a naive Bayes model over the frequencies of the fields you choose in the CRM Settings, from a start date. It shows it next to the opportunity's probability. It does not bring your own rules with points or labels such as Cold, Warm or Hot.
This module	You write your rules and each lead's score, from 0 to 100, is the sum of the points of the rules that match. It adds labels from **Cold (0-20)** to **Very Hot (71-100)**, revenue forecasting, churn risk, recommendations and GDPR requests. It requires a FlexigoTech Cloud subscription.

If you already score your leads in another tool, the rules are not imported: you write them again in Odoo, under **CRM Intelligence › Scoring Rules**. Each rule looks at a lead field with an operator and a threshold value, and gives points from 0 to 100.

22 Plans and price

€9

License per Odoo version.

+ FlexigoTech Cloud

STANDARD

€29/month

or €290 a year

- First response within 1 working day

PRO

€58/month

or €580 a year

- First response within 4 working hours
- Video call if needed

14-day trial, no card · **Prices exclude VAT**

The module license is per Odoo version. FlexigoTech Cloud is paid monthly or yearly, and the 14-day trial does not ask for a card.

23 Frequently asked questions

Does it work without FlexigoTech Cloud?

No. The module needs the FlexigoTech Cloud subscription or its 14-day trial with no card required.

Does it work on Odoo Online?

No. Odoo Online does not let you install third-party modules. It does work on Odoo.sh or on your own server.

Which Odoo versions are supported?

Published branches exist for Odoo 17, 18, 19 and 20.

Do I need Odoo Enterprise?

No. It works on Community and Enterprise: it only requires the CRM, email, website and Odoo digests. Tickets that count towards churn risk only come with Helpdesk, which is Enterprise.

Does the AI calculate lead scores?

No. The score, from 0 to 100, is the sum of the points of the rules you write and that match.

Does the AI learn from my sales?

No. It does not learn from your sales or score leads: it proposes the next step, its urgency, the risk with its reason, and a follow-up draft.

Where do I see the score?

Under **CRM Intelligence › Lead Scores**. It does not appear on the opportunity form or in the pipeline.

Does it come with ready-made scoring rules?

No. A fresh installation includes none: you write them yourself under **CRM Intelligence › Scoring Rules**.

How does a rule work?

Each rule looks at a lead field with an operator and a threshold value. If it matches, it adds its points, from 0 to 100, to the lead's score.

What labels can a lead have?

Cold (0-20), **Warm (21-40)**, **Hot (41-70)** or **Very Hot (71-100)**, depending on its score.

How often is scoring done?

Each night the leads that have never been scored and those someone changed in the last 24 hours are scored. **Run all now** runs it immediately.

What happens if I change a rule?

Leads already scored are not rescored until someone saves a change to them. **Run all now** does not rescore them either: it only scores new leads and those changed in the last 24 hours.

What does the FlexigoTech Cloud AI receive?

The text of each opportunity sent to it, without emails, phone numbers, websites or the names of the customer and its contacts. The exact text is shown under **CRM Intelligence › Configuration**.

Who accepts what is sent?

An administrator, with **Accept and switch on FlexigoTech Cloud AI**. Until then no opportunity is sent, and **Withdraw** removes it.

Are there opportunities that are never sent?

Yes. Those with **Opt Out Profiling** are not sent, nor are those marked **Is Whistleblower**.

Where does the AI run?

On FlexigoTech Cloud, on our own Netcup server in Germany, with an open-weight model and no other AI provider. It stores no text: only usage counters.

How do I request an AI next step?

With the **AI next step** button on the opportunity, or each night for new or changed opportunities. The response comes back within a minute or two.

How many AI next steps are made per month?

Each one uses one document of the month: 500 on the Standard plan, 1,000 on Pro and 20 on a test database. Overnight, 8 are processed by default.

How do I know something was generated by the AI?

It is marked «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.».

How is the forecast calculated?

Each night it adds up the expected revenue of all open opportunities, whenever they close, weighted by their probability and by the win rate of their stage. It discounts those that have been stalled for more than 30 days.

What is the forecast range?

The **Ci 80 Lower** and **Ci 80 Upper** columns, and the 95 ones on the form, are a fixed margin around the forecast amount, not a statistical interval.

How is churn risk calculated?

It starts at 50 and moves according to the days without changes, the tickets, the sentiment, the onboarding and the amount. It only looks at won opportunities, every night.

Is all churn risk filled in automatically?

No. The ticket sentiment and onboarding are entered by hand, and tickets only count with Helpdesk (Enterprise).

How is a GDPR request handled?

A sales manager creates it by hand under **CRM Intelligence › Data Subject Requests** and resolves it with the button for its type. There is no portal for the data subject.

Is there a record of what is done?

Yes. Every request processed and every run of the calculations is recorded in the audit log, which cannot be changed or deleted. It records what was done and by whom, but not the date.

Are the screens in my language?

Yes, they appear in the user's language. The texts of the rule-based recommendations always appear in English.

What recommendations does the module generate without AI?

Depending on the score, you get **Call Today**, **Send Demo**, **Add to Nurture Drip** or **Disqualify**. Every Monday a summary arrives by email.

Can the calculation times be changed?

The task frequencies are changed under **Settings › Technical › Automation › Scheduled Actions**, with developer mode enabled. The times shown under **Configuration** do nothing.

Does it work with several companies?

Yes. Each company works with its own configuration, rules and scores, and the AI permission is also per company.

What happens if something fails?

If FlexigoTech Cloud cannot reply, the opportunity says so in a note and nothing changes. A job lost by the cloud is sent again, once only.

How much does the module cost?

The module license, €9 per Odoo version, plus the FlexigoTech Cloud subscription, with a 14-day trial and no card required.

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24 Glossary

Lead	A sales contact that has not yet become a deal. It is what the module scores.
Opportunity	A specific deal in the CRM, with its expected revenue, probability and stage.
Scoring rule	A condition you write about a lead field. If it matches, it adds its points to the score.
Dimension	The type of signal a rule measures, for example budget, stage or interest.
Technical field name	The internal name of the lead field the rule checks, such as expected_revenue, probability or priority.
Operator	The comparison the rule makes: equal to, contains, greater than or equal to, or less than or equal to.
Threshold value	The value the rule compares the field against.
Weight or points	What a rule adds when it is met, from 0 to 100.

Score	The sum of the points from the active rules that a lead meets, capped at 0 to 100. The AI does not calculate it.
Score label	The score band: **Cold (0-20)**, **Warm (21-40)**, **Hot (41-70)** or **Very Hot (71-100)**.
Trend	Whether the score has improved, stayed the same or worsened compared with the previous calculation.
Score decay	An optional reduction to an engagement rule when a lead has gone more than 60 days without changes.
AI Next Step	A proposal generated by FlexigoTech Cloud AI for an opportunity, marked as generated by artificial intelligence.
Urgency	How pressing the next step is: **Immediate**, **High**, **Medium** or **Low**.
AI risk assessment	The risk of the opportunity as the AI assesses it, with its reasoning: **Low**, **Medium** or **High**.
Follow-up draft	A follow-up text the AI proposes for you to review and send.
Weighted pipeline	The sum of the expected revenue from open opportunities, multiplied by their probability and by the win rate of their stage.
Win rate	Won divided by the sum of won and lost from a given stage onwards.
Forecast margin	The range around the forecast amount, at two levels, 80 and 95. It is a fixed margin, not a statistical interval.
Churn risk	A score from 0 to 100 for each won opportunity, starting at 50 and rising or falling with inactivity and other factors.
Risk band	The churn risk band: **At risk**, **Watch list** or **Stable**.
Data subject request	A GDPR request from a person about their data: access, erasure, portability, rectification or objection. A sales manager creates it manually.
Profiling	Using an opportunity's data to score it or send it to the AI. **Opt Out Profiling** prevents this.
Audit log	A record of what was done and by whom, which cannot be changed or deleted.

25 Checklist and contact

- [ ] You have Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server, with the CRM installed.
- [ ] You have installed the module and the production database has FlexigoTech Cloud connected in **Settings › FlexigoTech Cloud**.
- [ ] You have started the 14-day trial on the production database, not on a staging copy or a database with demo data.
- [ ] An administrator has created the company configuration in **CRM Intelligence › Configuration**.
- [ ] An administrator has read the text of what the AI receives and has clicked **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration**.
- [ ] You have created your first rules in **CRM Intelligence › Scoring Rules**: a new installation comes with none.
- [ ] An administrator has clicked **Run all now** and the scores appear in **CRM Intelligence › Lead Scores**.
- [ ] You have clicked **AI next step** on an opportunity and, within a minute or two, the **AI next steps** tab shows the result.
- [ ] The forecast appears in **CRM Intelligence › Revenue Forecasts** with its amount and margins.
- [ ] A won opportunity has its risk in **CRM Intelligence › Churn Risk**, with its band.
- [ ] A sales manager has created a test request in **CRM Intelligence › Data Subject Requests** and the action has been recorded in **CRM Intelligence › Audit Log**.
- [ ] On Monday, a summary of the open recommendations from the last 7 days arrives for the sales managers or the recipients you have chosen.

If you would like us to set it up with you, get in touch. With the Pro plan, if needed, we can go through it by video call.

Email

To install it, set it up or for any question.
comercial@flexigotech.com

On the web

The module page, with the guide and the prices.
flexigotech.com/en/advanced-crm-intelligence-suite.html

On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

CRM Lead Scoring is a FlexigoTech module for Odoo. FlexigoTech is a brand of Flexibles y Accesorios Gobe, S.L. (Barcelona, Spain).