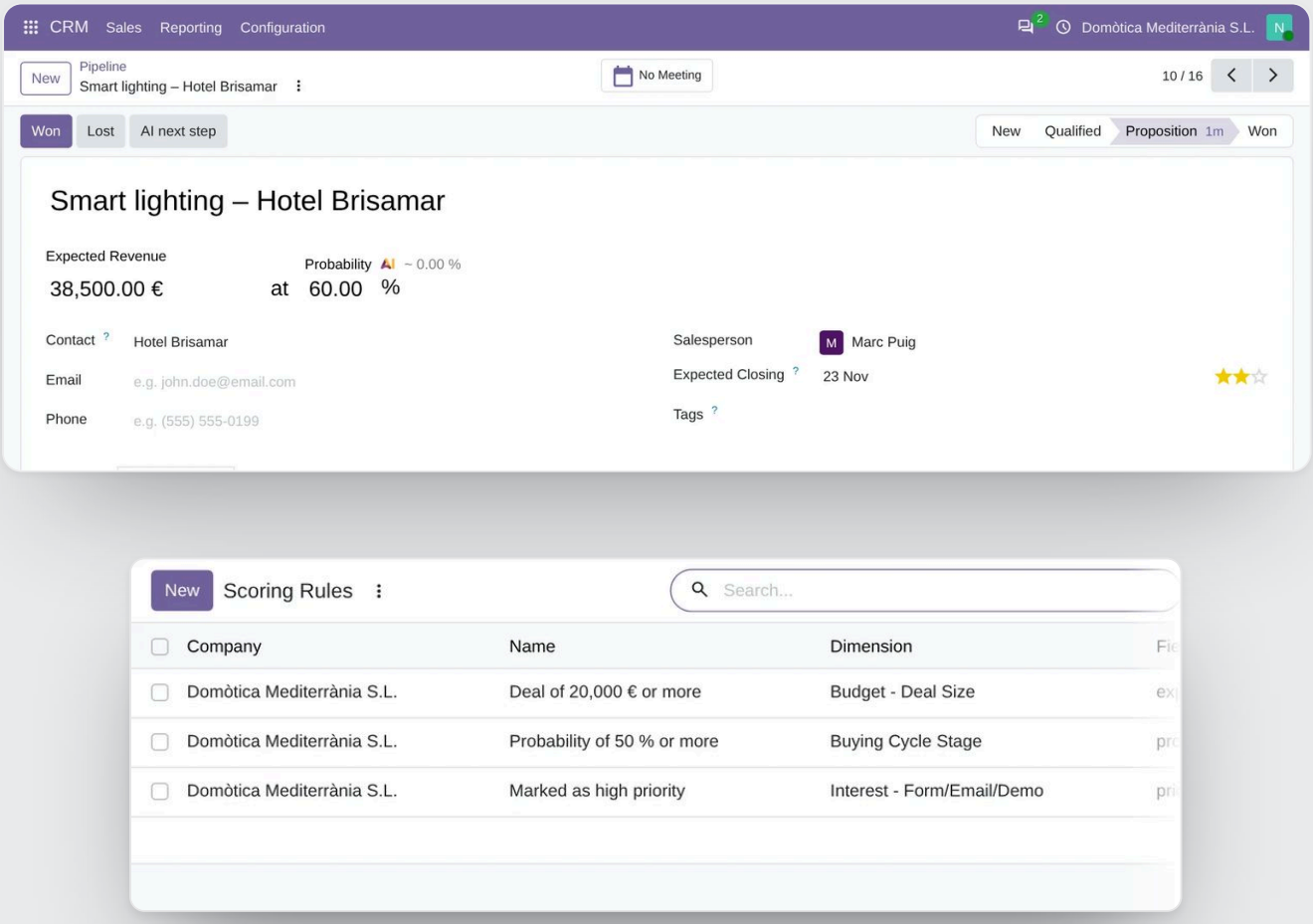
USER MANUAL · CRM AND SALES

CRM Lead Scoring for Odoo

For those who already have the module: install it, activate it, set it up and use it, step by step.

Module version 20.0.1.2.0 | Odoo 20 screenshots | Edition of 15-11-2026



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 section starts. Menu and button names are those of Odoo in English.

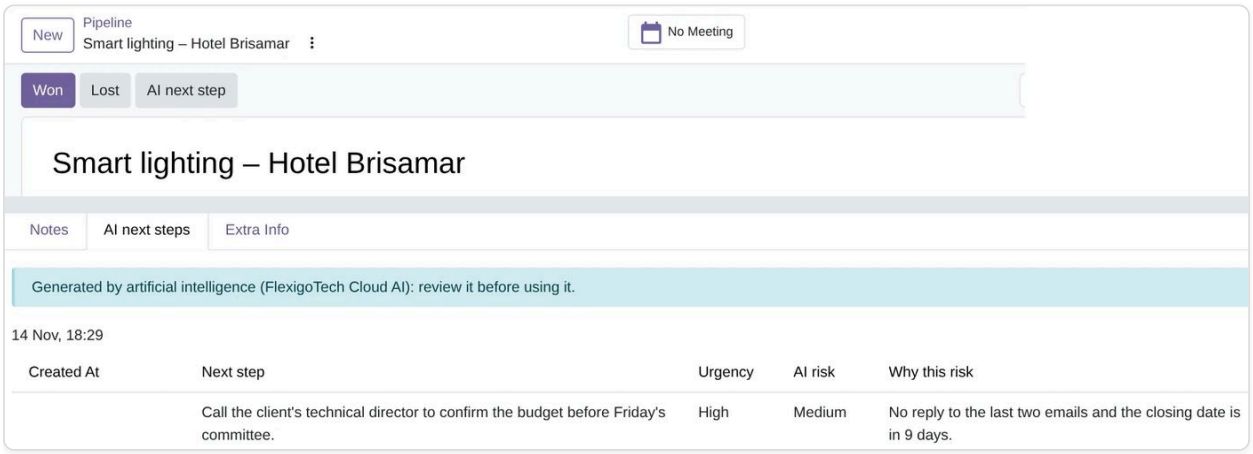
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This manual describes version 20.0.1.2.0 of the module (Odoo branch 20.0, commit 01efb393c). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to FlexigoTech Cloud. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where to find it

The module adds lead scoring with your own rules, a revenue forecast, churn risk, recommendations and GDPR requests to Odoo's CRM. Everything is in the **CRM Intelligence** menu, plus a tab and two buttons inside the opportunity.



- **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 it has 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 for 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 sector and activities.
CRM Intelligence › AI Models	Which FlexigoTech Cloud AI model 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 only appears while an AI next step is pending. The score does not appear on the opportunity or the pipeline: it is only in **CRM Intelligence › Lead Scores**. Every night the module scores, forecasts, calculates risk and updates recommendations, and every Monday the weekly summary arrives. The module's screens appear in the user's language, but the rule-based recommendation texts always appear in English.

2 Before you start

What you need to install the module and use it.

- 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 presses **Run all now**.
- A sales manager, who writes the scoring rules and handles the 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 come with any.

> Some things you do yourself: writing the scoring rules, setting the expected amount of the sales quotas, setting the sentiment of the tickets and the onboarding used by the churn risk, and creating and resolving the GDPR requests.

3 Installation

The module is installed like any third-party Odoo module. An administrator is required.

How to get it

From its page on Odoo Apps (**https://apps.odoo.com/apps/modules/20.0/flexigo_advanced_crm_intelligence_suite**) or from the module's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module's page lists it under «Community Apps Dependencies» and its price already includes it; it is also free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigo_advanced_crm_intelligence_suite` and `flexigotech_cloud` into your project branch, in your modules folder, and push.

2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.

3. **Install the app**
   In **Apps**, press **Update Apps List** (with developer mode on), search for "CRM Lead Scoring" and press **Activate**.

On your own server

1. **Copy the folders**
   Place `flexigo_advanced_crm_intelligence_suite` and `flexigotech_cloud` in a folder that is in your Odoo `addons_path`.

2. **Restart Odoo**
   So that it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "CRM Lead Scoring" and press **Activate**.

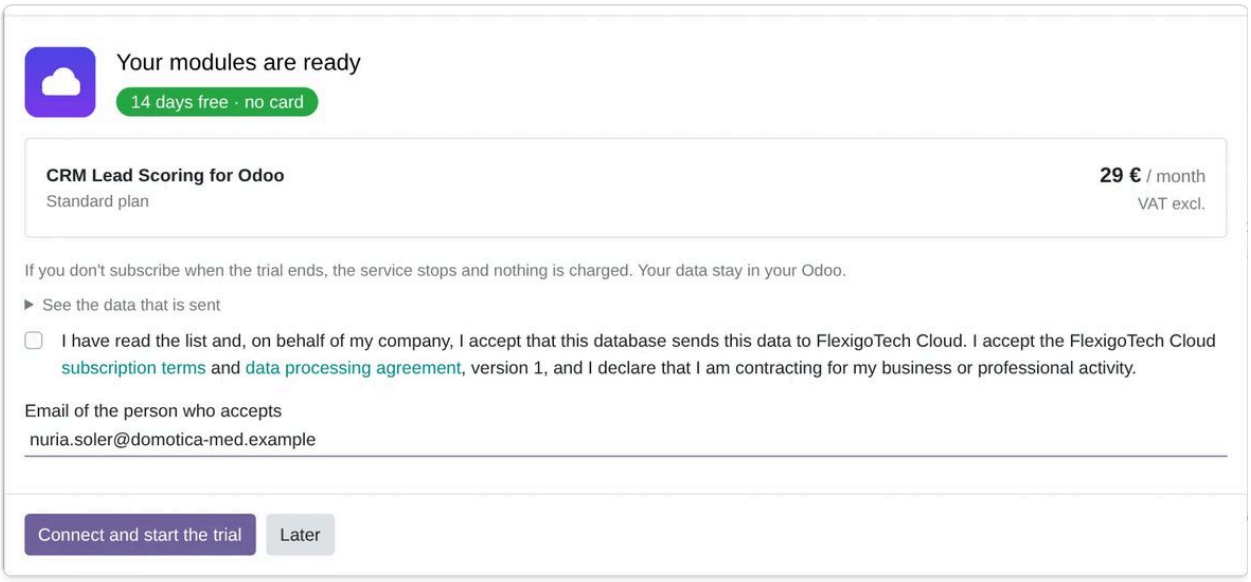
> When you install it, Odoo also installs the apps the module depends on: CRM. If you already use them, nothing you have changes.

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4 Activate FlexigoTech Cloud: the 14-day trial

Calls to CRM Lead Scoring go through FlexigoTech Cloud, FlexigoTech's service that stores your credentials encrypted. Until the database is connected and the module has a trial or subscription, the connector does not talk to CRM Lead Scoring.

1. **Press Activate in the bar at the top**
   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**

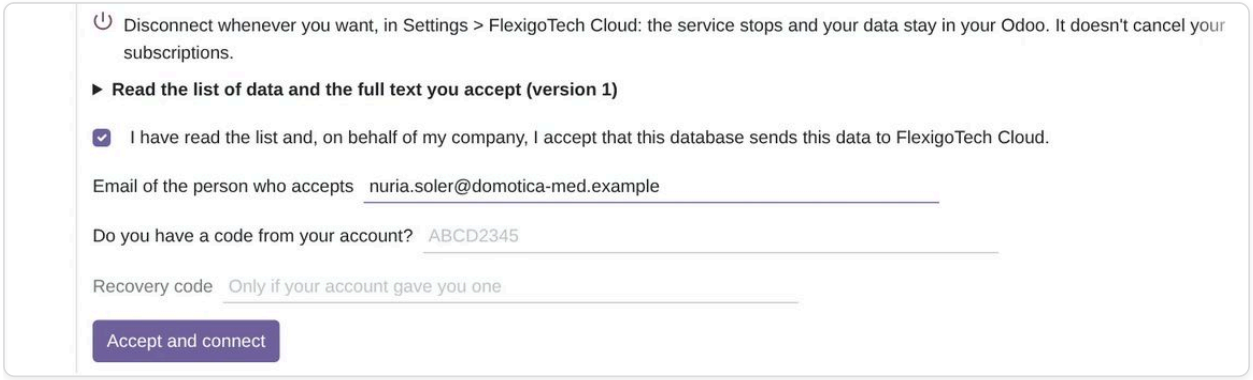
Tick «I have read the list and, on behalf of my company…» (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Press 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.

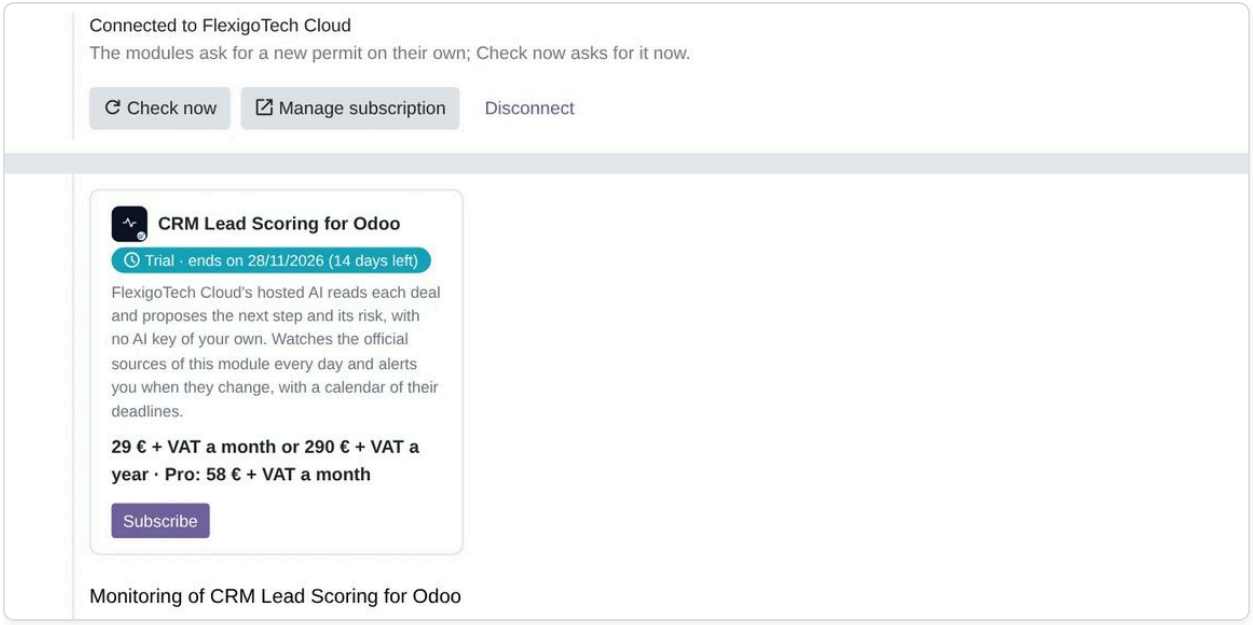
The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and press **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 ticked box, 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 press **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.

PLAN	PRICE	INCLUDES
Standard	€29 a month or €290 a year	Support reply within 1 working day
Pro	€58 a month or €580 a year	Reply within 4 working hours and a video call if needed

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged. **Check now** requests 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 «This database is a neutralised copy or has demo data, so trials can't be started here.»

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5 Getting it running

This is done once, when you install the module.

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 demonstration data.



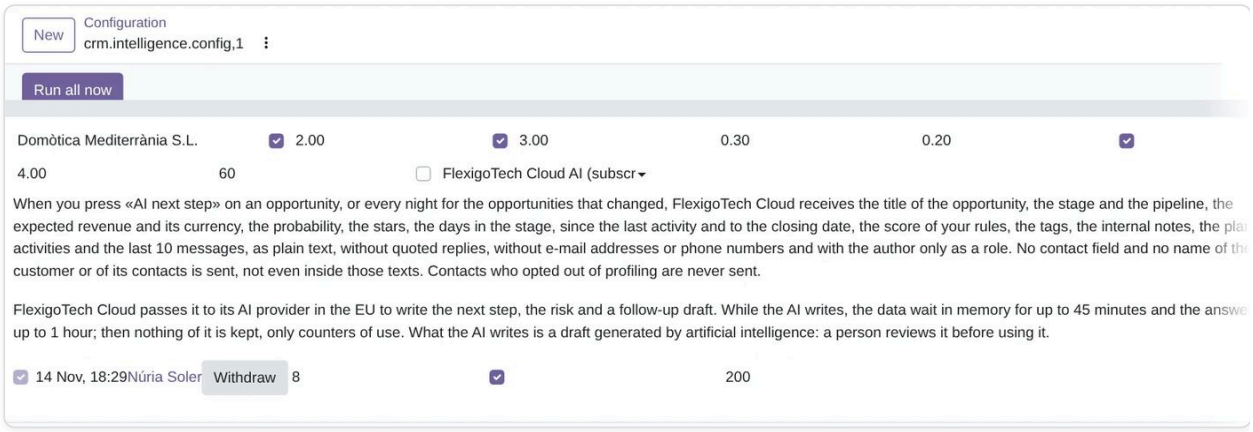
- **Real Odoo 20 screenshot.** The **FlexigoTech Cloud** block within the settings, with the **Try it free** option.

2 Create your company's configuration

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

3 Read and accept what the AI receives

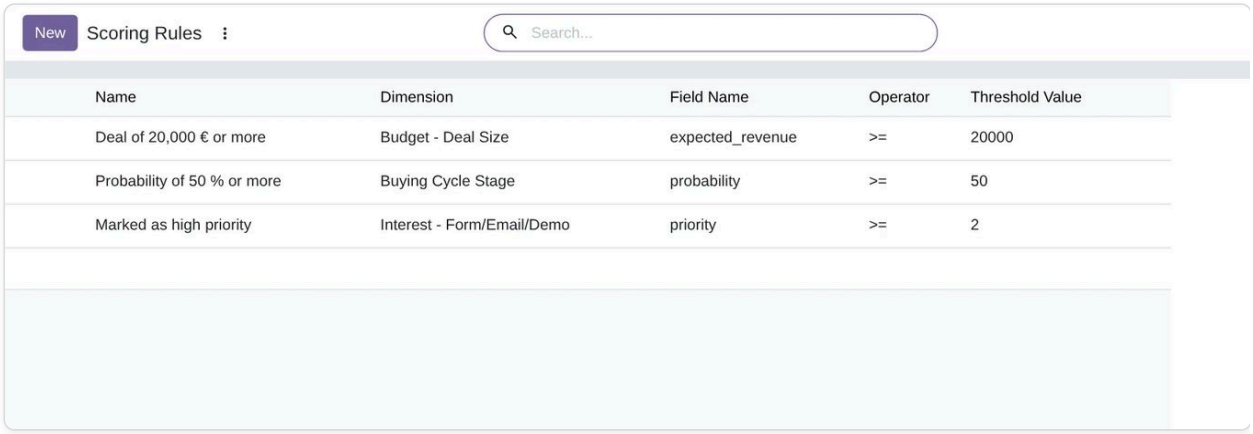
On that screen, read «What FlexigoTech Cloud AI receives». It shows the exact text of the data from each opportunity that is sent to FlexigoTech Cloud. If you agree, click **Accept and switch on FlexigoTech Cloud AI**. The module records who accepted it and when. Until you accept, no opportunity is sent 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

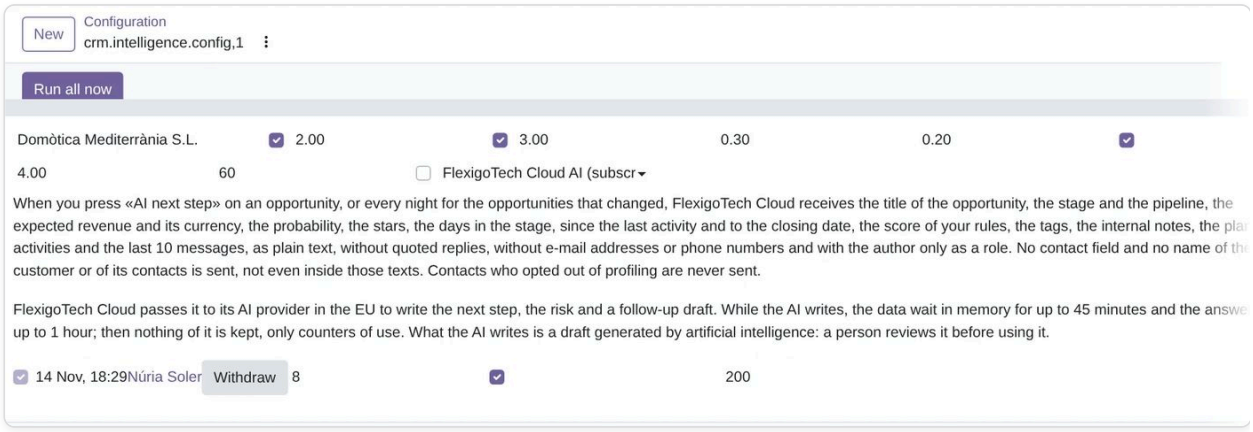
Go to **CRM Intelligence › Scoring Rules** and create your rules. For each one you fill in the **Name**, the **Dimension**, the **Field Name** (the technical name of the lead field the rule checks, typed by hand), the **Operator**, the **Threshold Value** and the **Weight**, which are the points it adds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



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

5 Press Run all now

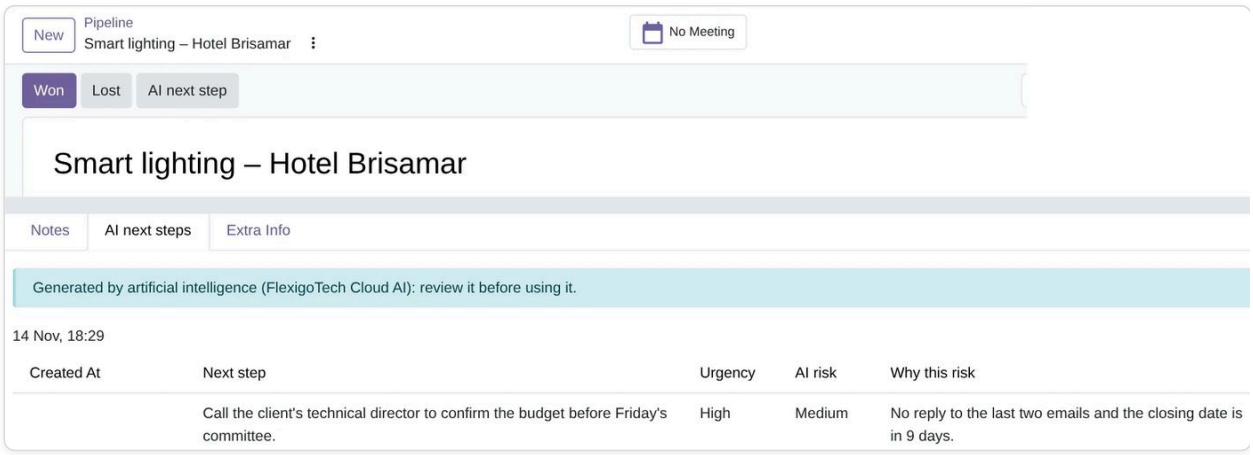
In **CRM Intelligence › Configuration**, an administrator presses **Run all now**. It does right away what happens each night: the scoring, the forecast, the churn risk, the recommendations and, with the AI accepted, the sending to FlexigoTech Cloud of that night's opportunities. This way you get the first score 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 press **AI next step**. The reply arrives in a minute or two and is kept in the **AI next steps** tab, marked as AI-generated. While it is pending, **Check AI next step** appears instead of the button.



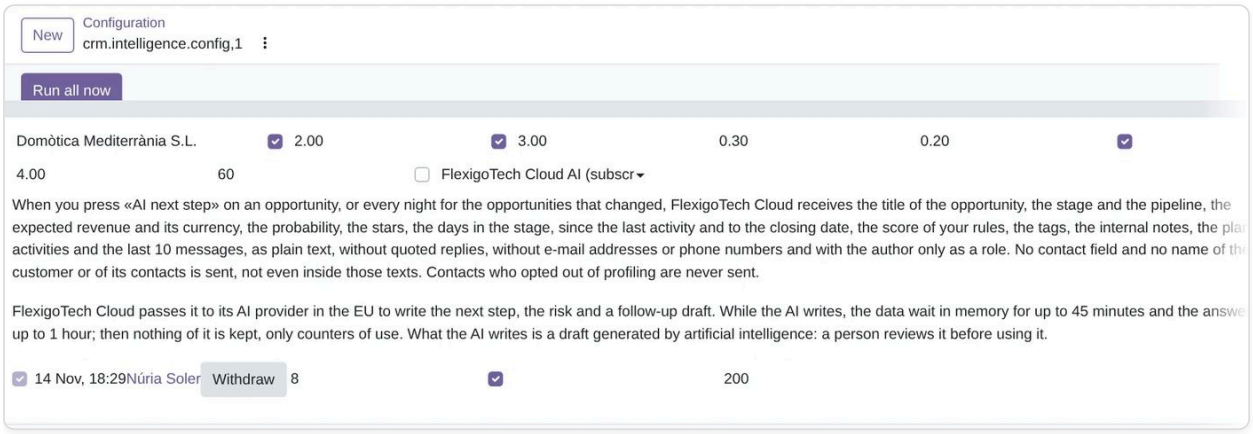
- **Real Odoo 20 screenshot.** The opportunity with the **AI next steps** tab and the notice «Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it.»

> Only an administrator can accept what the AI receives, withdraw it and click **Run all now**. A sales manager writes the rules and handles GDPR requests. If anyone 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. Each 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 the 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.

6 The module's options

The options are in **CRM Intelligence › Configuration** and each one applies to your company.



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

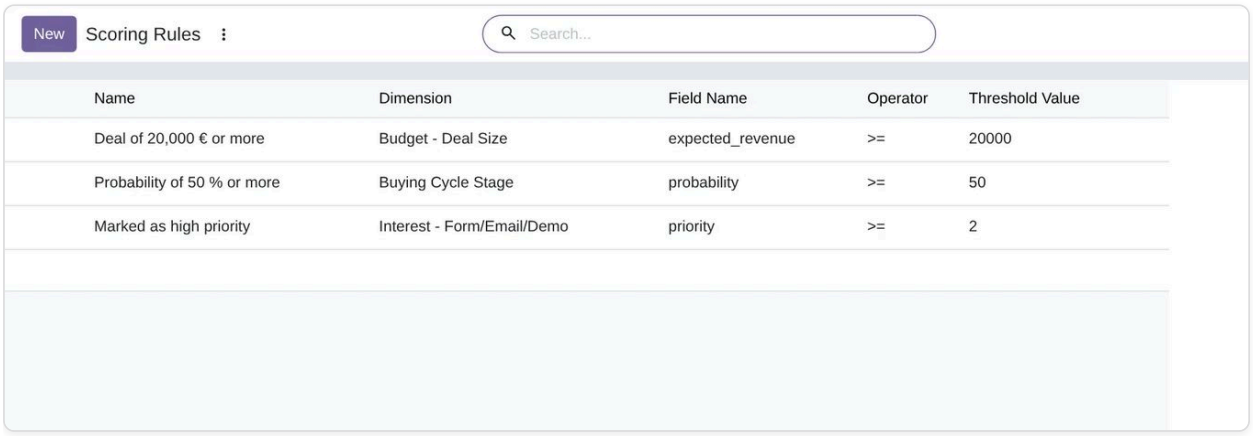
OPTION	DEFAULT	WHAT IT DOES
Enable Lead Scoring	On	Off: no lead is scored, not even with **Run all now**.
Enable Forecasting	On	Off: the forecast is not calculated.
Enable Churn Detection	On	Off: the churn risk is not calculated.
Discount Rate Stalled	0.2	A number between 0 and 1: the discount applied in the forecast to opportunities that have been in the stage for more than 30 days.
Batch Size	200	Leads processed per batch in the score, churn risk and recommendation calculations.
Send Weekly Digest	On	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 company's sales managers receive it.
AI next steps per night	8	How many changed opportunities the module sends each night to FlexigoTech Cloud AI. Each one uses one document of the month.
Ai Provider	FlexigoTech Cloud AI	It is left like this: with any other option, no next step is requested.

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

These appear on 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 score is always the sum of your rules.

7 Creating your scoring rules

The rules are what score each lead: without rules, every lead comes out at 0, because a new installation includes none.



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

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

What you fill in for each rule

Name	What the rule is called. 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 looks at, typed by hand, such as expected_revenue, probability or priority.
Operator	The list shows =, contains, >= and <=. 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. 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 calculated

The scheduled task **CRM Intelligence: Compute Lead Scores** runs every day. You can also press **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 press **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**.

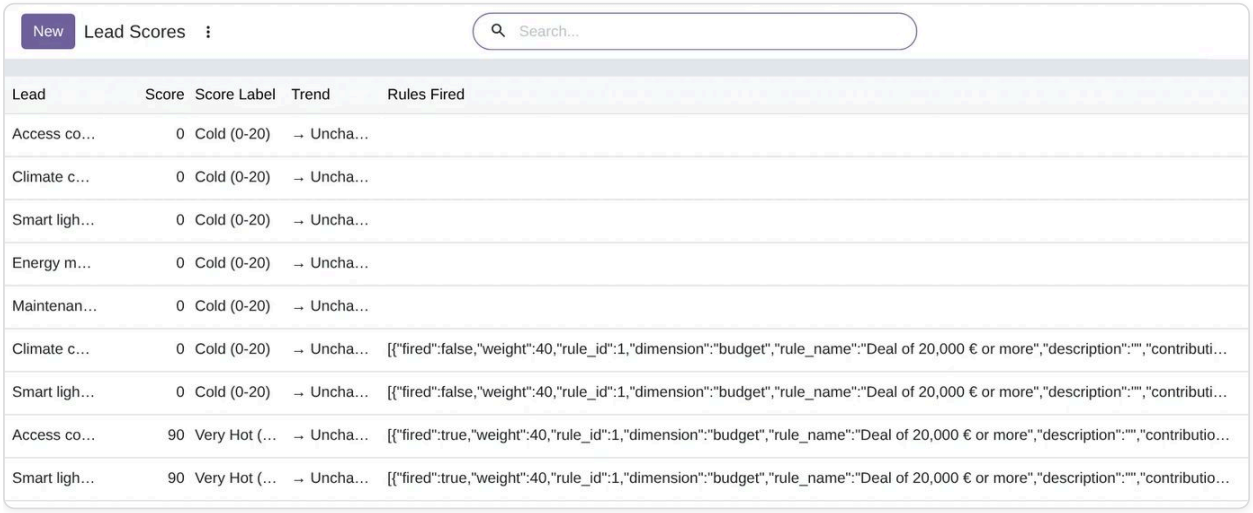
3 **Save**

The rule is applied in the next score calculation.

> The **Field Name** is required: without it, the form will not save. It will not save either with a **Weight** outside 0 to 100: Odoo warns in English with "Rule '...' weight must be 0-100", naming the rule.

8 Viewing the scores

Each lead has a score that comes from adding the points of the rules that are met, and you see it in **CRM Intelligence › Lead Scores**.



- **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 between 0 and 100. FlexigoTech Cloud AI does not score. Each lead also receives a label based on its score and a trend compared with the previous calculation.

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 task that runs every day. It scores the leads that have never been scored and those that someone changed in the last 24 hours.
Run all now	Button on **CRM Intelligence › Configuration**, administrators only. It does right away what happens each night: the score, the forecast, the churn risk, the recommendations and, with the 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 between 0 and 100.
Score Label	**Cold (0-20)**, **Warm (21-40)**, **Hot (41-70)** or **Very Hot (71-100)**.
Trend	Improving, unchanged or worsening, with an arrow in front, based on the change in score compared with the previous calculation.
Rules Fired	List with the detail of the rules evaluated. Shown in JSON format.
Last Computed	Date and time when the score was calculated.

Statuses

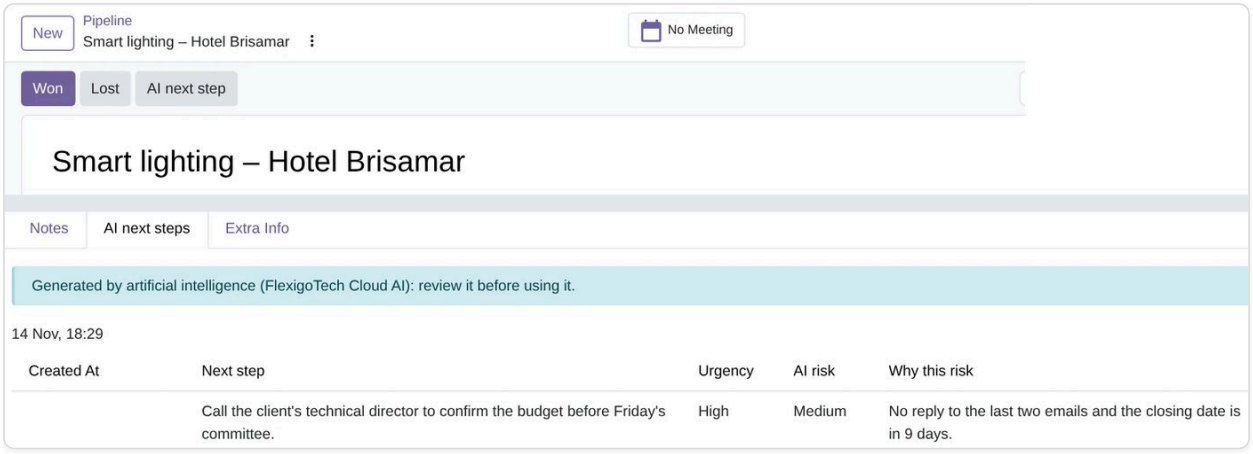
The label is the status of each lead and changes with the score. Its four values are **Cold (0-20)**, **Warm (21-40)**, **Hot (41-70)** and **Very Hot (71-100)**. The number in brackets is the score range it corresponds to.

> 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 task does not fill them in. The module's forms show the values without labels: the list is easier to read than the form.

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9 Requesting the next step with AI

From an opportunity you ask FlexigoTech Cloud AI for the next step, and the result returns to the same record within a minute or two.



- **Real Odoo 20 screenshot.** Opportunity with **AI next step** on the toolbar 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 is sent to FlexigoTech Cloud as a job and the response comes back within 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 task **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. Hidden while a next step is already on its way.
Check AI next step	Checks for the response right away. Only shown 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 for the Monday digest. Hidden once it is already dismissed.

What comes back

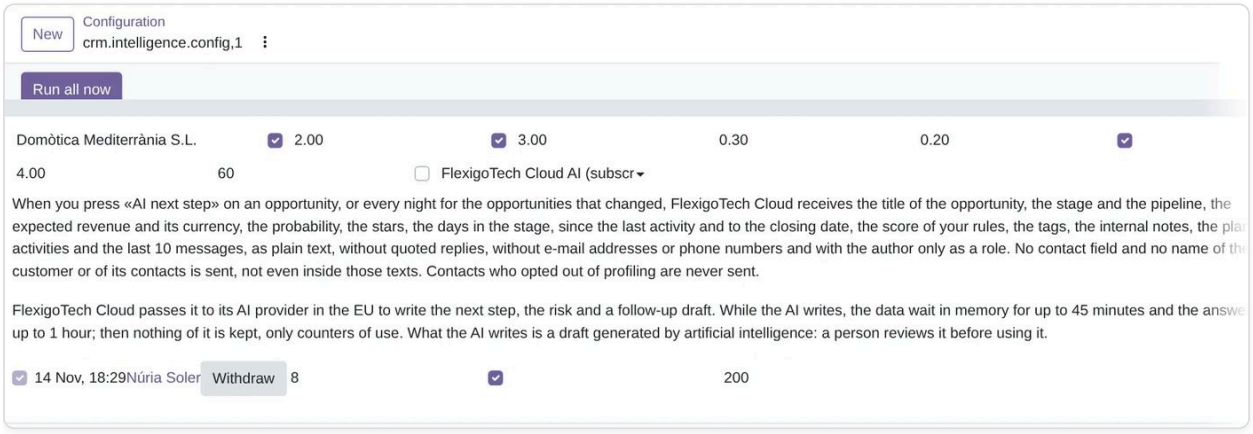
The next step, its **Urgency**, the **AI risk** with **Why this risk** and a **Follow-up draft** come back. They are in the **AI next steps** tab and in **CRM Intelligence › Recommendations**, marked as AI-generated. The previous one is set aside, not deleted.

> Without the 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 respond, the opportunity says so in a note and nothing changes.

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10 Accepting or withdrawing FlexigoTech Cloud AI

No opportunity is sent to FlexigoTech Cloud AI until an administrator accepts it in **CRM Intelligence › Configuration**.



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

What leaves each opportunity

The exact text is in the **Configuration** form, under **What FlexigoTech Cloud AI receives**. It covers the title, the stage and the pipeline, the expected revenue and its currency, the probability, the stars, the days in the stage, the days since the last activity and until closing, the score from your rules, the tags, the internal notes, the planned activities and the last 10 messages. Messages go out as plain text, without quoted replies, and the

author only as a role. No email addresses, phone numbers or websites leave, nor the names of the customer and its contacts. Each request carries up to 8,000 characters.

The buttons and the permission data

Accept and switch on FlexigoTech Cloud AI	Only an administrator sees it, with the provider set to **FlexigoTech Cloud AI (subscription, no key needed)** and while the permission has not been granted.
Withdraw	Only an administrator sees it, 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. It comes set to 8.

States

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

Accepting the AI

1. **Log in as an administrator and go to CRM Intelligence › Configuration**
   Open the configuration record for your company.
2. **Read What FlexigoTech Cloud AI receives**
   It 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**.

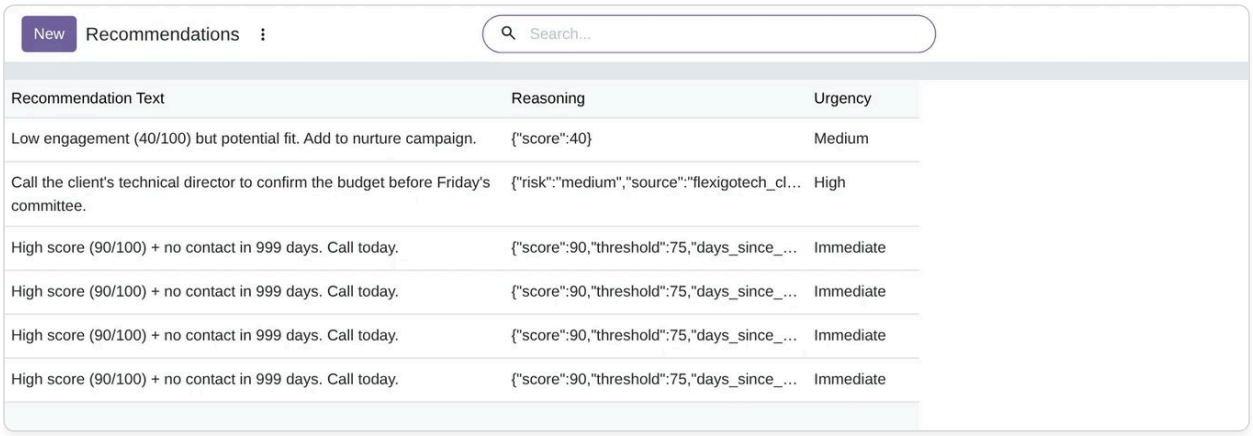
What never leaves

Opportunities marked **Opt Out Profiling** do not leave, nor do those where another opportunity from the same customer, or with the same email, carries that mark. Opportunities marked **Is Whistleblower** do not leave 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."

11 Recommendations

Here you see the actions the module proposes for each lead and opportunity, and you can dismiss the ones that do not help you.



- **Real Odoo 20 screenshot.** The **Recommendations** list with the action type, the text, the reasoning and the 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's score band, you get **Call Today**, **Send Demo**, **Add to Nurture Drip** or **Disqualify**. Their text is in English in every language.

The **AI next step** ones come from the button of the same name on the opportunity, or from the nightly task. They are marked **Generated by AI** and with the notice "Generated by artificial intelligence (FlexigoTech Cloud AI): review it before using it."

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

Fields of a recommendation

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	Only on AI ones: **Low**, **Medium** or **High**.
Why this risk	Only on AI ones: the reason for the risk.
Follow-up draft	Only on AI ones: a follow-up text to review.
Dismiss	Button that marks it as dismissed.

States

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

Summary every Monday

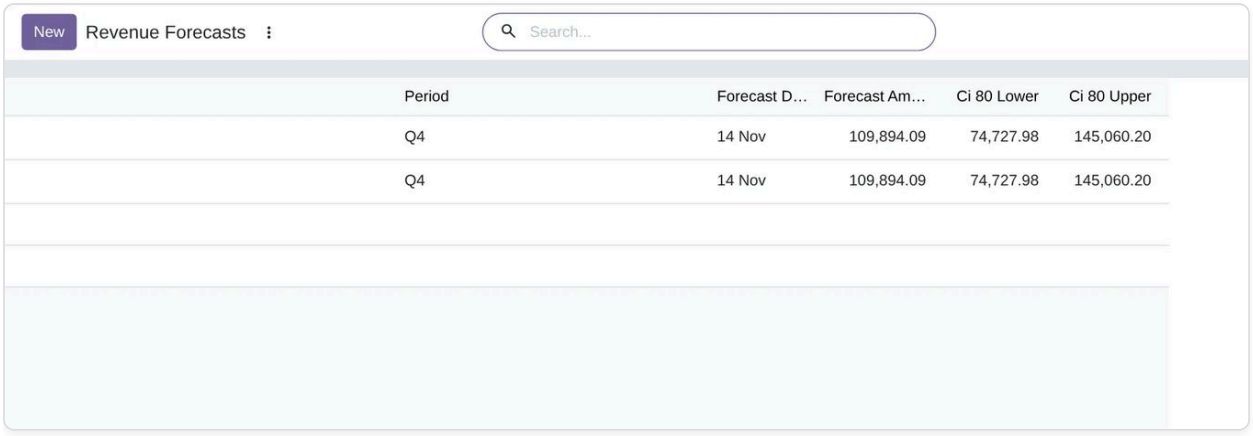
Every Monday, the **CRM Intelligence: Weekly Digest** task sends an email to the sales managers, or to the recipients you choose in **CRM Intelligence › Configuration**. It includes the open recommendations from the last 7 days, with the AI ones marked. It is switched on by default.

> 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.

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12 Forecasts and quotas

Here you see how much revenue your open pipeline adds up to, weighted by probability, and what quota each salesperson has.



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

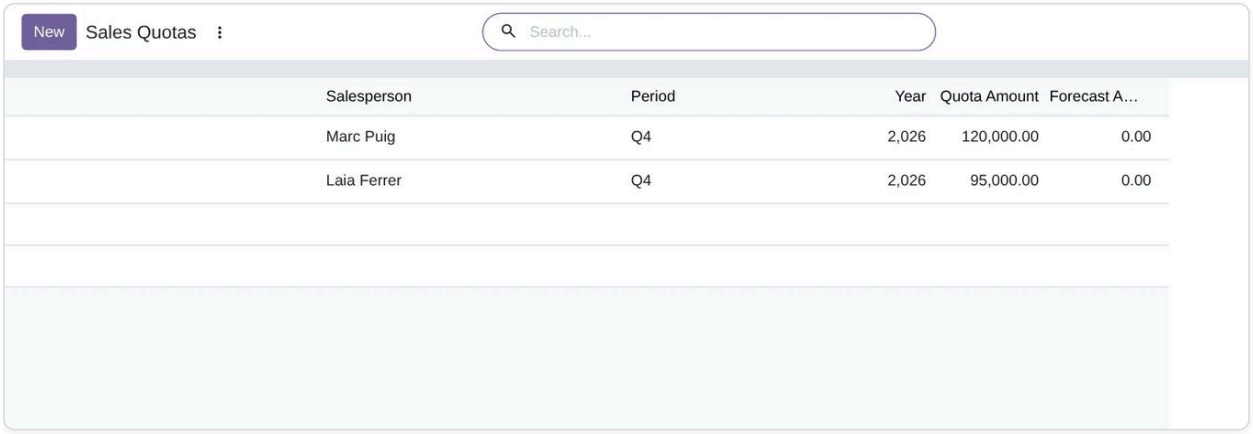
You are in **CRM Intelligence › Revenue Forecasts**. Each night the module adds a new row, with the current quarter in **Period**. It adds up the expected revenue of all open opportunities, whenever they close, multiplied by their probability and by the close rate of their stage, and it discounts those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

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	Only for sales managers. It computes what was won in the period of that forecast, but this screen does not show the result.

Sales Quotas



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

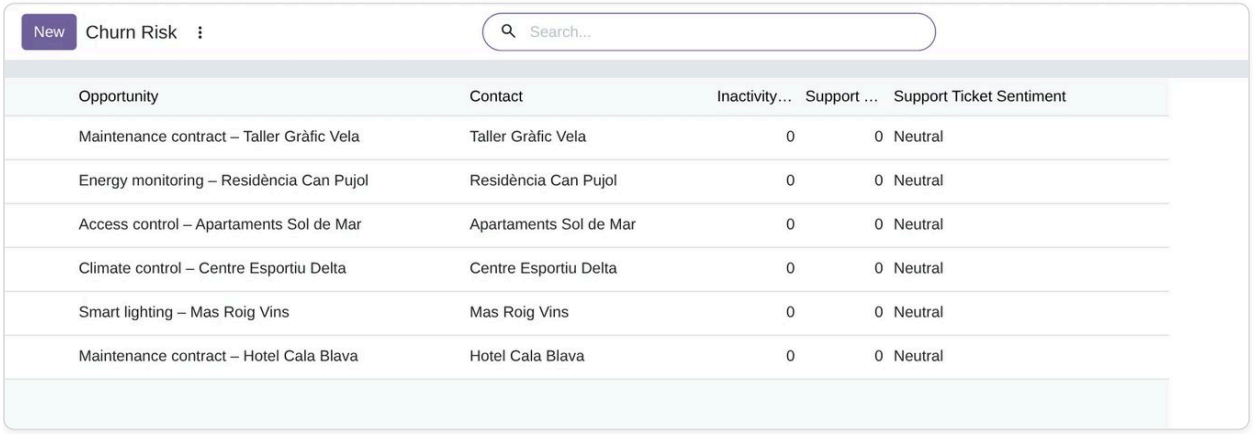
In **CRM Intelligence › Sales Quotas** you record, per salesperson, the period (Q1 to Q4), the year and the quota amount. You type the **Forecast Amount** yourself. The **Attainment (%)** and the **Gap Amount** are calculated from that figure.

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

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13 Churn risk

Each won opportunity has a churn risk score from 0 to 100, which you see in **CRM Intelligence › Churn Risk**.

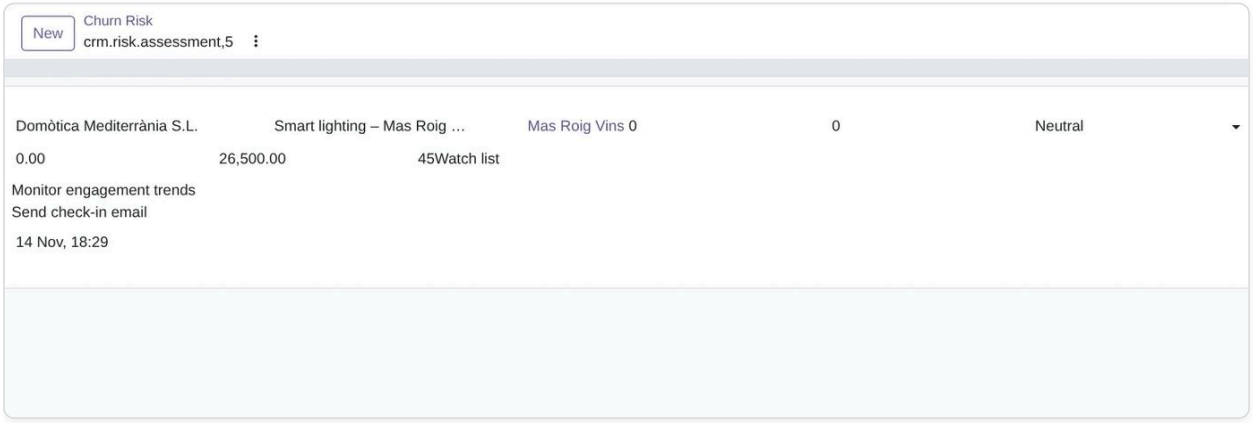


- **Real Odoo 20 screenshot.** The **Churn Risk** list with the days of inactivity, the tickets and the sentiment of each won opportunity.

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

Where each data point comes from

- The module calculates the days of inactivity, the tickets from the last 30 days and the customer value (the expected revenue of the opportunity). The tickets only count if you have Helpdesk (Enterprise).
- Nobody fills in the ticket sentiment and the onboarding completion automatically: you set them by hand on the record.
- The calculation runs every day with the scheduled task **CRM Intelligence: Update Churn Risk Scores** and only looks at won opportunities.
- To calculate it immediately, an administrator clicks **Run all now**.



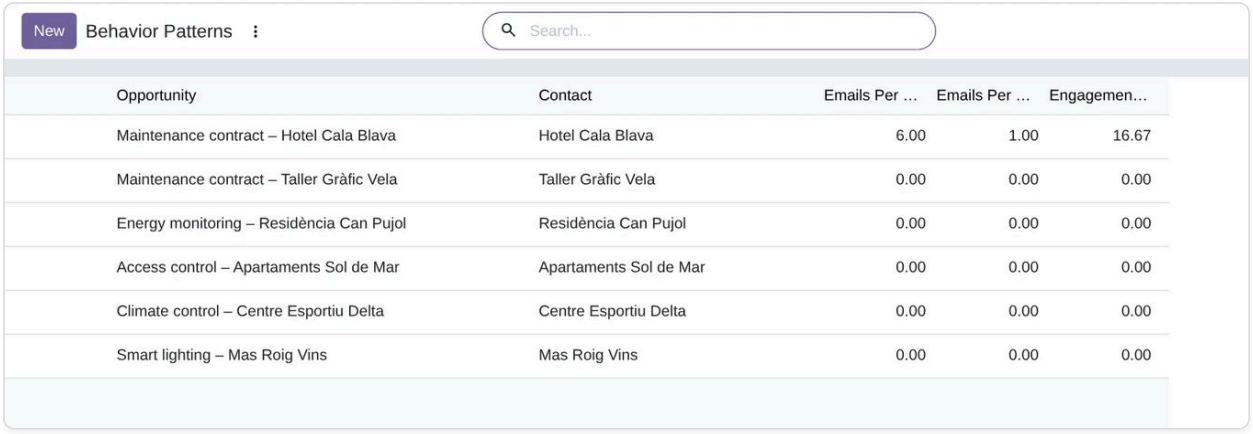
- **Real Odoo 20 screenshot.** The opportunity record with the score, the **Watch list** band and its recommended actions.

The bands

BAND	SCORE	WHAT HAPPENS
At risk	70 or more	Three actions: a quarterly review with the customer, offering a discount or activating more features, and escalating to the account owner.
Watch list	From 40 to 69	Two actions: monitor the engagement 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 engagement 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 engagement loss.

Recompute	It counts the messages again and recalculates the renewal probability and the expansion potential, with the risk the opportunity already has. Only sales managers 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** says when it was last calculated.

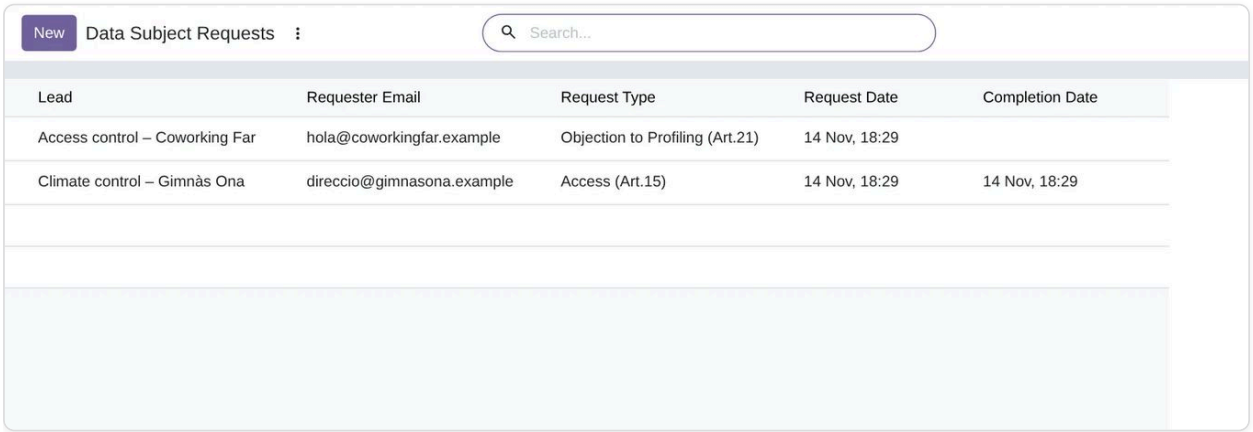
> The AI does not calculate this risk: the module does, with its fixed rules. Sentiment and onboarding are not filled in automatically, so until you set them by hand they do not enter the score. The screens show values without labels and some columns in JSON.

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14 Handling a GDPR request

Here you record and resolve requests for access, portability, erasure, objection and rectification of a person's data, and everything is logged.

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 resolved with the button that matches its type. Only those who are sales managers see and press them.



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

The request buttons

Export Data	For access and portability. It generates a JSON file with the name, email, phone, company and stage of the opportunity, its scores, its recommendations and its audit log, and saves it under **Exported Data**.
Erase Personal Data	For erasure. It 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 opt-out requests, mark the opportunity with **Opt Out Profiling**.
Correct Contact Data	For rectification. Open the contact so you can correct it by hand, and note who opened it and when.

Each button only appears when the request is of the type it serves and is in **Pending**.

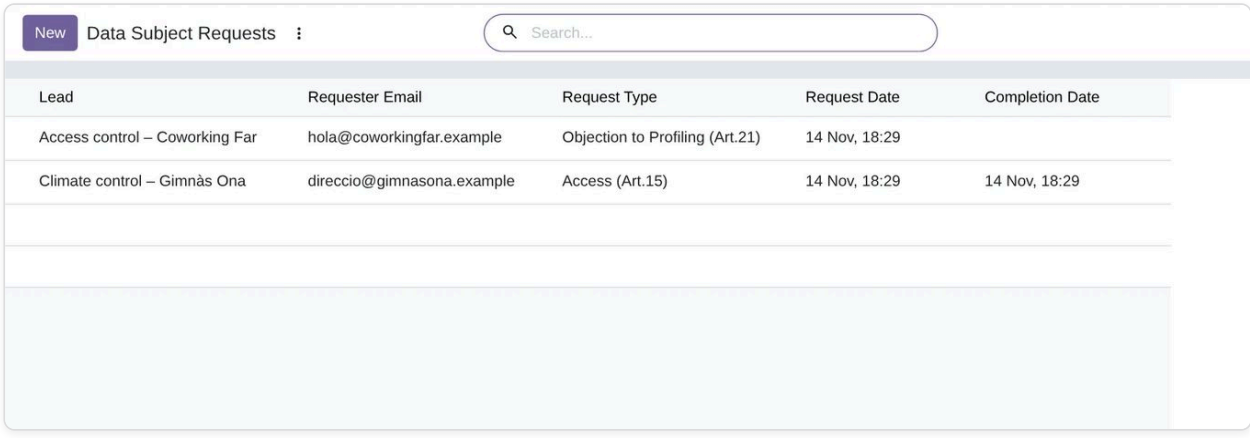
Statuses

- **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 invoice data was retained.
- **Denied**: rejected, with the legal basis recorded in **Reason Denied**. It is set automatically when 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 click **New**.



- **Real Odoo 20 screenshot.** The list of data subject requests.

2 Fill in the request

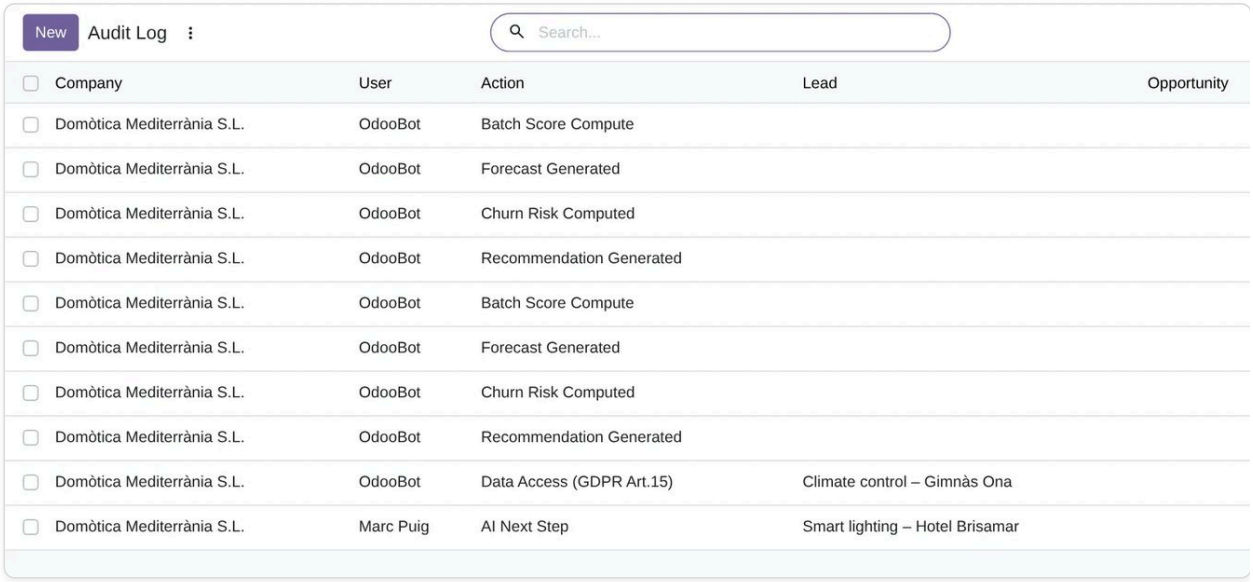
Choose the **Lead**, enter the **Requester Email** and the **Request Type**.

3 Click 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. Record anything needed in **Notes**.

4 **Check the record**

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



- **Real Odoo 20 screenshot.** The audit log showing 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.

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15 What happens automatically

The module includes seven scheduled tasks that score, forecast, calculate churn risk and clean up without anyone clicking anything, provided the company has its configuration in place.

TASK	FREQUENCY	WHAT IT DOES
CRM Intelligence: Compute Lead Scores	Daily, enabled	Scores leads that have never been scored and those changed by someone 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 for won opportunities.
CRM Intelligence: Refresh Recommendations	Daily, enabled	Generates rule-based recommendations and starts sending that night's opportunities to the AI.
CRM Intelligence: Data Purge Job	Daily, enabled	Deletes scores and recommendations unchanged for more than 24 months.

TASK	FREQUENCY	WHAT IT DOES
CRM Intelligence: Weekly Digest	Weekly, enabled	Sends the summary of open recommendations every Monday.
CRM Intelligence: Collect FlexigoTech Cloud AI next steps	Every 2 minutes, enabled	Collects AI responses that are ready and sends the remaining opportunities for that night.

Frequencies are changed in **Settings › Technical › Automation › Scheduled Actions**, with developer mode enabled. All tasks are enabled by default.

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16 If something fails

These are the most common cases and what you can do in each.

No scores or forecasts appear	The company configuration is missing. An administrator creates it in **CRM Intelligence › Configuration** with **New**, then clicks **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 demonstration data, from **Settings › FlexigoTech Cloud**.
Nothing is sent to the AI	An administrator must click **Accept and switch on FlexigoTech Cloud AI** in **CRM Intelligence › Configuration**. Until they do, no opportunity is sent. To withdraw it, use **Withdraw**.
The Accept and switch on FlexigoTech Cloud AI button does not appear	It only appears when FlexigoTech has been chosen as the AI provider and the permission has not yet been accepted. With another provider selected or the permission already granted, it is hidden.
An opportunity does not generate a next step	Opportunities with **Opt Out Profiling** are not sent, nor are those where another opportunity of the same customer or with the same email has it, nor those marked **Is Whistleblower**. Both flags are visible in **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: click it to ask now.
A lead has no new score	Each night only leads that have never been scored and those 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 click **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 answer, the opportunity says so in a note and nothing changes. A job the cloud lost is sent again, once only.

17 Support

Contact us for installation, configuration or any question. On the Standard plan we respond within 1 working day; on the Pro plan, within 4 working hours, and if needed we can review it by video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

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).