The background features a complex, low-poly geometric pattern in shades of teal, purple, and yellow. A thin, light-colored grid is overlaid on the pattern, and a large, thin, light-colored circle is centered on the page.

Odoo Training Part III

# Understanding and Managing Stages

New

LG Mobile App

Non-Responsive

Investigators

Dead Lead (Investigators)

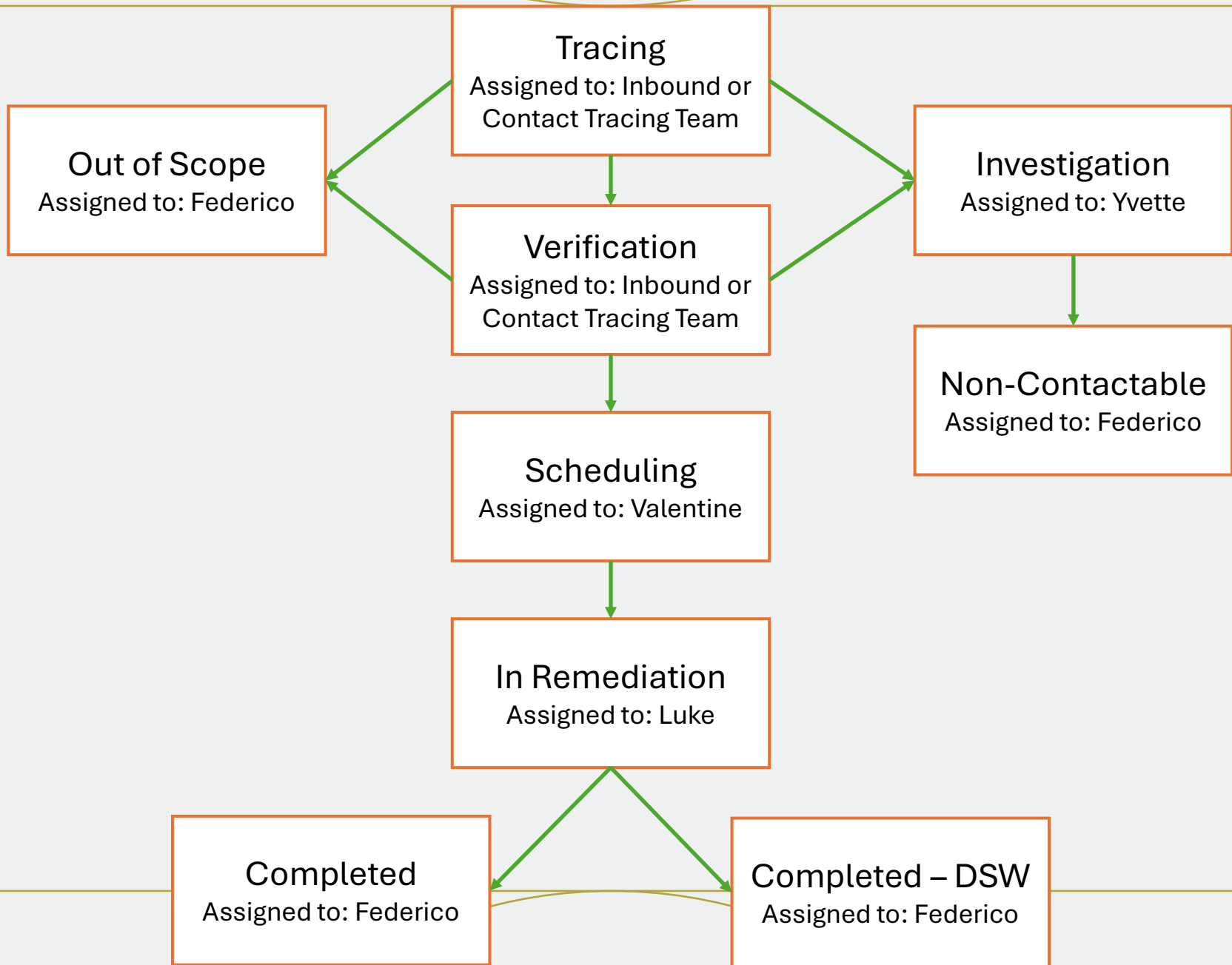
Contact Tracing (Installer)

...

# Stages!

- Stages help us pull reports and give us a baseline of what percentage of the recall is complete or in progress.
- Stages will be updated really soon! But here is a quick overview of the new stages and what the temporary name is.

| New             | Old                         |
|-----------------|-----------------------------|
| Tracing         | New                         |
| Verification    | Contact Tracing (Installer) |
| Investigation   | Investigators               |
| Scheduling      | LG Mobile App               |
| In Remediation  | SSG Recall (End User)       |
| Completed       | OG.Inst Recall (End User)   |
| Completed – DSW | Software Update (End User)  |
| Non-Contactable | Dead Lead (Investigators)   |
| Out of Scope    | No Further Action           |



# Tracing – New

## Tracing Screen setup

- Assigned to: Inbound or Contact Tracing Team
- Response Required: Yes
- Battery Recall Information: Blank

The screenshot shows a software interface with two tabs: "Battery Recall Information" (selected) and "Communication Log". Below the tabs is a table with the following columns: "Serial Number", "Submit Battery", "Identifie...", "Recall Type", and "ACCC Status". There is a small icon in the top right corner of the table area. Below the table, there is a link that says "Add a line".

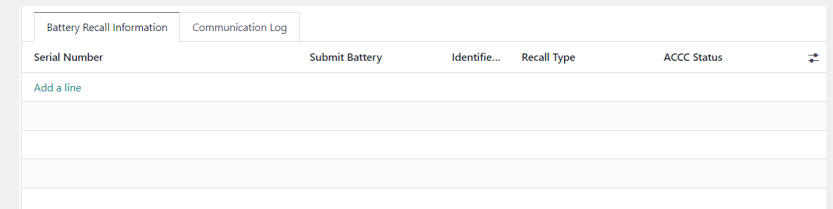
| Serial Number              | Submit Battery | Identifie... | Recall Type | ACCC Status |
|----------------------------|----------------|--------------|-------------|-------------|
| <a href="#">Add a line</a> |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |

# Verification – Contact Tracing (Installer)

Moves from Tracing once we have been in contact with customer and collecting all of the information

Tracing Screen setup

- Assigned to: Inbound or Contact Tracing Team
- Response Required: Yes
- Battery Recall Information: Blank



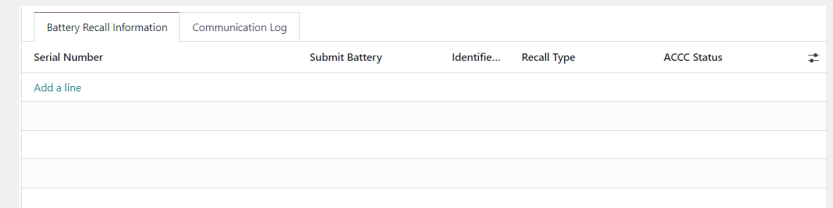
| Serial Number              | Submit Battery | Identify... | Recall Type | ACCC Status |  |
|----------------------------|----------------|-------------|-------------|-------------|--|
| <a href="#">Add a line</a> |                |             |             |             |  |
|                            |                |             |             |             |  |
|                            |                |             |             |             |  |
|                            |                |             |             |             |  |
|                            |                |             |             |             |  |

# Investigation – Investigators

Moves from Tracing when the call centre have exhausted all tracing efforts.

Tracing Screen setup

- Assigned to: Change to Yvette
- Response Required: Yes
- Call Attempted: 10
- Emails Sent: 5
- Letters Sent: 2
- Battery Recall Information: Blank



| Serial Number              | Submit Battery | Identifie... | Recall Type | ACCC Status |
|----------------------------|----------------|--------------|-------------|-------------|
| <a href="#">Add a line</a> |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |

# Scheduling – LG Mobile App

Moves from Tracing once we have confirmed the below information and have a LG Battery SN or have attempted photo confirmation of a LG battery and/or cabinet at site.


Tracing Screen setup




- Assigned to: Change to Valentine

Sections that are Required

- Customer Address
- Battery at Customer Address
- Battery Site Address (if different)
- Installer
- Cabinet Type
- Inverter Make
- Inverter Model
- Inverter Online
- System
- Med Devices On-Site?
- Fire Risk Area?
- Battery Isolated?
- Isolated Date
- Serial Number
- Job Type
- Identified Date

# Examples of Battery Recall Information

| Battery Recall Information |  | Communication Log |
|----------------------------|--|-------------------|
| Serial Number              | Submit Battery   | Identified Date   |
| OBSTRUCTED SN              |  Site Visit |                   |
| <a href="#">Add a line</a> |  |                   |

| Battery Recall Information |  | Communication Log |             |                          |   |
|----------------------------|--|-------------------|-------------|--------------------------|---|
| Serial Number              | Submit Battery   | Identified Date   | Recall Type | ACCC Status              |    |
| R48189P3SBMA1904259061     |  DSW Update | 22/07/2024        | DSW         | E1; SW Updated - Isol... |  |

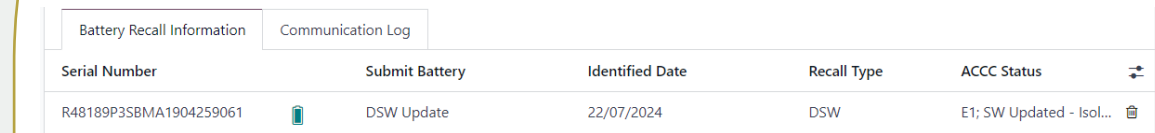


# In Remediation – SSG Recall (End User)



Moves from Scheduling once validation is completed

Tracing Screen setup

- Assigned to: Change to Luke for Compensation
- Response Required: No



The screenshot shows a software interface with two tabs: "Battery Recall Information" (selected) and "Communication Log". Below the tabs is a table with the following data:

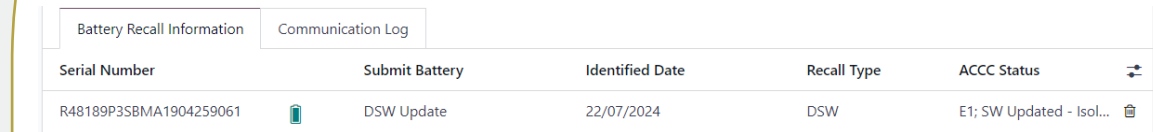
| Serial Number          | Submit Battery   | Identified Date | Recall Type | ACCC Status  |
|------------------------|--|-----------------|-------------|--|
| R48189P3SBMA1904259061 |  DSW Update | 22/07/2024      | DSW         | E1; SW Updated - Isol...  |



# Completed – OG Inst Recall

Moves from Scheduling once validation is completed

Tracing Screen setup

- Assigned to: Change to Federico
- Response Required: No



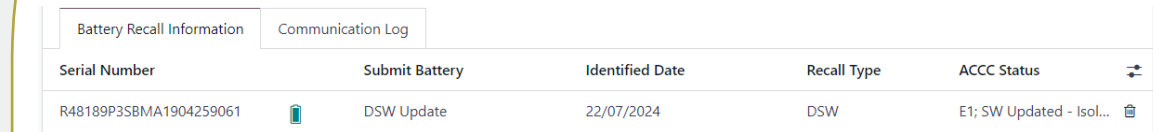
| Serial Number          | Submit Battery   | Identified Date | Recall Type | ACCC Status  |
|------------------------|--|-----------------|-------------|--|
| R48189P3SBMA1904259061 |  DSW Update | 22/07/2024      | DSW         | E1; SW Updated - Isol...  |

# Completed ~ DSW – Software Update



Moves from Scheduling once validation is completed

Tracing Screen setup

- Assigned to: Change to Federico
- Response Required: No



The screenshot shows a software interface with two tabs: "Battery Recall Information" (selected) and "Communication Log". Below the tabs is a table with the following data:

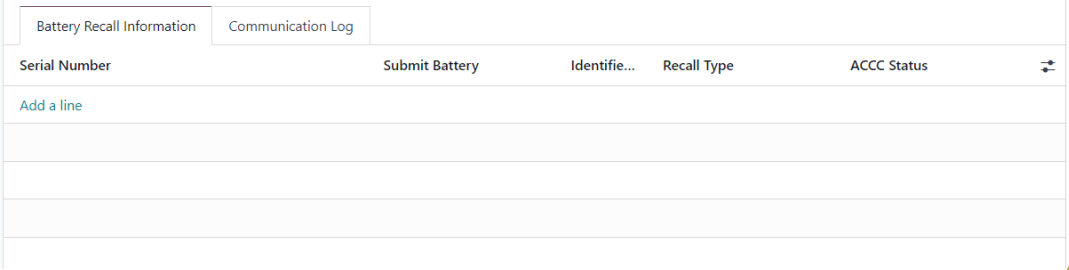
| Serial Number          | Submit Battery   | Identified Date | Recall Type | ACCC Status  |
|------------------------|--|-----------------|-------------|--|
| R48189P3SBMA1904259061 |  DSW Update | 22/07/2024      | DSW         | E1; SW Updated - Isol...  |

# Non-Contactable – Dead Lead

Moves from Investigation when the Investigation Team has completed their investigation checklist.

Tracing Screen setup

- Assigned to: Change to Federico
- Response Required: Yes
- Battery Recall Information: Blank




| Serial Number              | Submit Battery | Identifie... | Recall Type | ACCC Status |
|----------------------------|----------------|--------------|-------------|-------------|
| <a href="#">Add a line</a> |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |
|                            |                |              |             |             |


# Out of Scope – No Further Action

Moved from Tracing Screen once it is confirmed there is no battery or a non-LG battery at the property. Or an international battery.

Tracing Screen setup

- Assigned to: Federico
- Response Required: No
- Serial Number: NO BATTERY or NON LG BATTERY
- Submit Battery: Job Not Required
- Identified Date

| Battery Recall Information |   | Communication Log |                 |
|----------------------------|---|-------------------|-----------------|
| Serial Number              |   | Submit Battery    | Identified Date |
| NO BATTERY                 |  | Job Not Required  | 02/08/2024      |

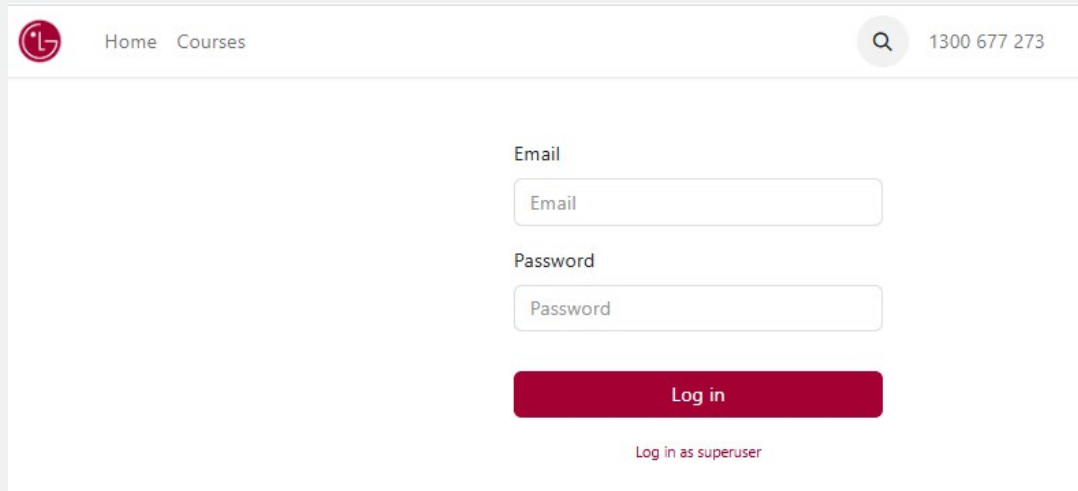
| Battery Recall Information |   | Communication Log |                 |
|----------------------------|---|-------------------|-----------------|
| Serial Number              |   | Submit Battery    | Identified Date |
| NON LG BATTERY             |  | Job Not Required  | 08/10/2024      |
| <a href="#">Add a line</a> |   |                   |                 |

The background features a complex, low-poly geometric pattern in shades of teal, purple, and yellow. A light gray grid is overlaid on the pattern, and a thin yellow circle is centered in the upper half of the image. The text is centered within the lower half of the circle.

*A Day in the Life  
of a Call Operator*

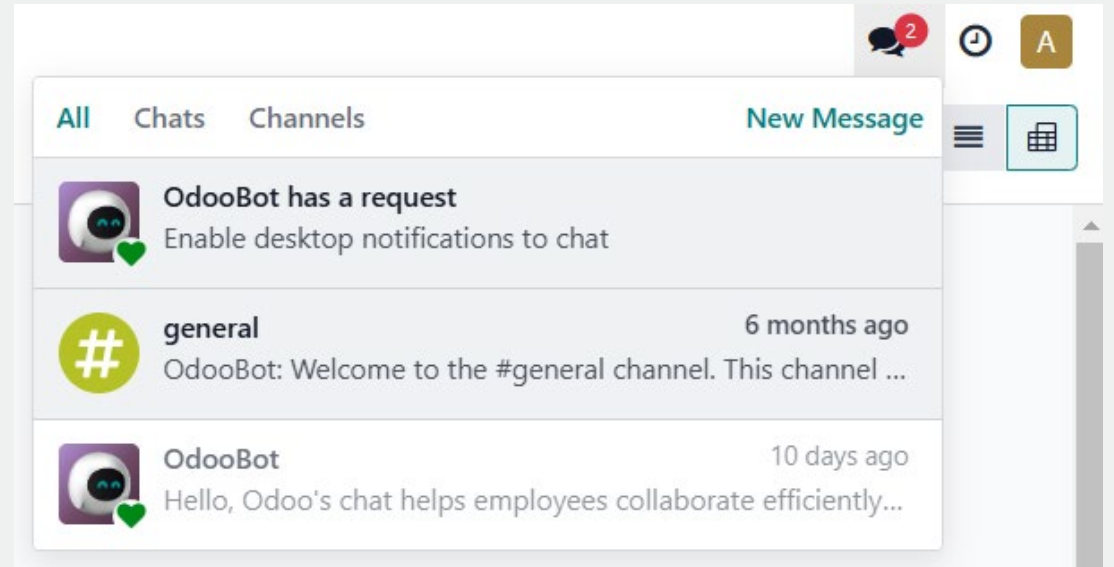
# Start Your Day in Odoo

## Login



The login page features a header with the Odoo logo, navigation links for 'Home' and 'Courses', and a search bar containing the phone number '1300 677 273'. The main content area contains two input fields: 'Email' and 'Password'. Below these fields is a prominent red 'Log in' button. At the bottom of the form, there is a link that says 'Log in as superuser'.

## Check Notifications




The notification overlay shows a chat interface with tabs for 'All', 'Chats', and 'Channels'. A 'New Message' button is visible in the top right. The notification list includes:

- OdooBot has a request** (6 months ago): Enable desktop notifications to chat
- #general** (6 months ago): OdooBot: Welcome to the #general channel. This channel ...
- OdooBot** (10 days ago): Hello, Odoo's chat helps employees collaborate efficiently...

# Review Activities

46
11


Partner Tracing  
0 Late   **11 Today**   22 Future

Recalls Recall Contacts
46 11 V

New
Partner Tracing ⚙️1-32 / 32 < > 🗨️ 📄 ⚙️

| <input type="checkbox"/> Name   | Serial Number? | Customer           | Customer Address   | Lead Source                             | Stage                      | Phone           |
|---|----------------|--------------------|--|---|----------------------------|-----------------|
| <input type="checkbox"/> DANIEL CAMILLERI - LG Website                          | 1 record       | Daniel Camilleri   | 5 Arizonica Dr, Clontarf QLD 2481, Australia               | LG Email or Letter                      | Contact Tracing (End User) | 0414 203 744    |
| <input type="checkbox"/> Justin Booth   | 1 record       | Justin Booth       | 34 Jacaranda Drive, Diamond Creek VIC 3673                 | Television Advertisement                | Software Update (End User) | 0417 034 369    |
| <input type="checkbox"/> Tom Pledger  | 2 records      | Tom Pledger        | 21 Ira Street, Wellington WGN 6022, New Zealand            | LG Email or Letter                      | Software Update (End User) | +64 (4) 9700148 |
| <input type="checkbox"/> Jennifer Webster and Keith Webster - TFA Solar Pty Ltd | 1 record       | Jenifer Webster    | 4/18 Fletcher Rd, Mount Barker SA 5158                     | LG Email or Letter                      | Software Update (End User) | 0400 718 464    |
| <input type="checkbox"/> Laveena Lobo   | 1 record       | Laveena Lobo       | 60 Glenlea Bvd, Mount Barker SA 3806, Australia            | Letter from the ACCC                    | Software Update (End User) | 0432 456 783    |
| <input type="checkbox"/> Scott Black Solar - Installer                          | 1 record       | Scott Black        | 84 Patage  | Original Installer                      | Contact Tracing (End User) | 0419 727 114    |
| <input type="checkbox"/> Mark Nash  | 1 record       | Mark Nash          | 227 Enterprise Rd, Yundi SA 5172, Australia                | Television Advertisement                | Software Update (End User) | 0438 846 194    |
| <input type="checkbox"/> RK Solar Service - Sean Duff                           | 1 record       | Sean Duff          | 401 Castlereagh Rd, Agnes Banks NSW 4503, Australia        | Search Ad (e.g. link on Google or Bing) | Software Update (End User) | 0417 228 381    |
| <input type="checkbox"/> Sky Energy Systems                                     | No records     | Sky Energy Systems |  |   | Contact Tracing (End User) | 1300 787 488    |
| <input type="checkbox"/> Mark Sturt   | 2 records      | Mark Sturt         | 24 Clayton-Hill Road, Langwarrin South VIC 2477, Australia | Awaiting Lead Source from Customer      | Contact Tracing (End User) | 0411 141 618    |
| <input type="checkbox"/> Jason Diggle   | 6 records      | Jason Diggle       | 26 Baxter Ave, Surrey Downs SA 2464, Australia             | Awaiting Lead Source from Customer      | OG.Inst Recall (End User)  | 0439 814 978    |
| <input type="checkbox"/> Simon Ruben  | 1 record       | Simon Ruben        | 24 Amour Ave, Maroubra NSW 3039, Australia                 | Search Ad (e.g. link on Google or Bing) | Software Update (End User) | 0415 416 316    |
| <input type="checkbox"/> Andrew Miller  | 1 record       | Andrew Miller      | 55 Heron Place, South Yunderup SA 3147, Australia          | Awaiting Lead Source from Customer      | Software Update (End User) | 0409 159 298    |
| <input type="checkbox"/> Anthony O'Connell                                      | 1 record       | Anthony O'Connell  | 6 Raylee Pl, Lynbrook VIC 3975, Australia                  | Word of Mouth                           | New                        | 0433 137 200    |
| <input type="checkbox"/> Arjen Lugtenburg                                       | 1 record       | Arjen Lugtenburg   |  | LG Email or Letter                      | New                        | 0420 874 489    |
| <input type="checkbox"/> Jayde Hourigan   | 1 record       | Jayde Hourigan     | 126 MacFarlane Burnet Ave, MacGregor ACT 2615, Australia   | LG Email or Letter                      | New                        | 0433 926 463    |
| <input type="checkbox"/> Boon Tan   | 5 records      | Boon Tan           | 3 The Moor, Balwyn North VIC 3104, Australia               | Television Advertisement                | Contact Tracing (End User) | 0404 185 080    |
| <input type="checkbox"/> Aaron Baumeister                                       | 1 record       | Aaron Baumeister   | 6 Shackleton St, Robertson NSW 2577, Australia             | Television Advertisement                | Software Update (End User) | 0423 847 414    |
| <input type="checkbox"/> Aidan Flanagan   | 1 record       | Aidan Flanagan     | 33 Bideford St, Torquay QLD 4655, Australia                | Original Installer                      | New                        | 0414 959 459    |
| <input type="checkbox"/> Don Ledwidge   | 1 record       | Don Ledwidge       | 45 Farnell St, Hunters Hill NSW 2110, Australia            | LG Email or Letter                      | Software Update (End User) | 0417 473 913    |



# Open Your Tracing Screen

Recalls Recall Contacts

New Tracing ⚙️

1-2 / 2 < > ☰

🔍 ★ Alai's Tracing ✕ Search...

| <input type="checkbox"/> | Name    | Serial Number? | Customer | Customer Ad... | Lead Source | Stage | Phone | ⚙️ |
|--------------------------|---------|----------------|----------|----------------|-------------|-------|-------|----|
| ▶                        | No (28) |                |          |                |             |       |       |    |
| ▶                        | Yes (2) |                |          |                |             |       |       |    |

# Process “Yes” Responses

**Evaluate Each Case:** Go through all cases marked with “Yes” for response required.

- **Stage Check:** Determine which stage each case is in and assess whether a follow-up call or email is necessary.
- **Assign Tasks:** If additional actions are required, create tasks or reminders in the Log Notes or Activity sections.
- **Missing Information:** Check if any required fields or documentation are missing; complete any missing information to keep cases moving.
- **Stage Changes:** If the case has progressed, update the stage accordingly and reassign if necessary.

# Process “No” Responses

**Evaluate Cases Without Immediate Response:** Go through cases marked with “No” for response required.

- **Information Check:** Ensure no important information is missing.
- **Stage Progression:** If all information is complete and actions are fulfilled, determine if the stage can be updated.
- **Assign or Reassign:** If the case is ready for the next stage, assign it to the appropriate team member.