

RESPONSE READY AND MEDIYA

Three processes, now running in your Odoo

Two are built and in your sandbox waiting for a final test. The third is ready to build and needs one export from Kari.

BUILT

Lead router

BUILT

Quote validator

READY TO BUILD

AEDTS renewals

SANDBOX

36403641

WHERE WE ARE

Documented, built, deployed, now being tested

LEAD ROUTER

Live

Routing, territory table, SLA sweep. Eight example leads in the sandbox. Waiting on Prabakar to confirm the territory owners.

QUOTE VALIDATOR

Live

Twenty one checks driven by Beth's own SKU lists. Nine example quotes. Waiting on Beth to run it against her real work.

AEDTS RENEWALS

Ready

Kari's biggest recurring task. Built and tested against sample data. Needs one real export to go further.

WORTH SAYING OUT LOUD

Your sandbox was rebuilt on 14 August and everything in the old one was lost, including edits your team had made. Both processes are now scripted end to end and kept in a repository, so the next rebuild costs about ten minutes instead of a day.

ONE

The quote validator

Beth reviewed it twice and changed our mind on two rules. Both are now hers, not ours.

01

WHAT HER REVIEW CHANGED

Two rules were wrong, and she was right about both

RETIRED

Pediatric pads on an adult quote

She pointed out pediatric pads can go on any order. She was right, and the rule could never have worked. There is no patient type on a quote, so it was reading the notes for the word child and guessing. It is gone.

REPLACED BY

Do these pads fit this AED

Thirteen model families built from your own product names. A ZOLL AED 3 with ZOLL AED Plus pads is now caught. Same brand, different model, which brand matching always let through.

AND A RULE ABOUT HOW THE TEAM WORKS

A quote can no longer be sent while anything is open. The rep either fixes it or waives it with a written reason. No manager approval anywhere in it, because Beth did not want a bottleneck. The manager override we had built was removed at her request.

ON YOUR OWN OPEN QUOTES

Four real errors, none of them findable by brand

QUOTE	WHAT	DETAIL
S02310	A SKU that must not be quoted	AVMAC LLC is quoting a Heartsine value package that only exists for the web shop
S01744	Right brand, wrong model	Rhinebeck schools, a ZOLL AED 3 with ZOLL AED Plus pads
S01446	Pads for another device	San Diego Police, a Philips FRx with Cardiac Science pads
S02184	Pads for another device	CALTRANS, a ZOLL AED Plus with Cardiac Science pads

422

OPEN QUOTES

292

CARRY A FINDING

152

MISSING COLLATERAL

3

WRONG PADS

NINE EXAMPLE QUOTES

One per check, built on your own SKUs

A check nobody happens to trigger stays invisible, so each of these exists to show exactly one thing. Search VALIDATOR DEMO in the quotation list.

QUOTE	WHAT IT SHOWS	DETAIL
S02549	Four AED units against two AEDTS	Quantity mismatch, nothing else on the quote
S02550	Total Solution with no device	Asks the rep to confirm the customer's own AEDs
S02551	Rental equipment total	Three rentals plus three cabinets is six
S02552	Pads that do not fit the AED	Names the model each pad is actually for
S02553	A complete AED sale	No findings at all, what good looks like
S02554	The same mismatch, waived	Reason stored on the row
S02555	Right brand, wrong model	Philips FRx with Philips OnSite pads

TWO

The inbound lead router

Rebuilt from a script this time, so it survives the next sandbox.

02

EIGHT EXAMPLE LEADS

Every routing case, visible in one list

Priority is county or ZIP first, then state, then the default rep. Search ROUTER DEMO in the leads list.

LEAD	WHAT IT SHOWS	ROUTED TO
Plain state match	California outside San Diego	MACKENZIE SHELTON
Sub region by ZIP	Same state, San Diego ZIP	ENRIQUE CHRISTOPHERSON
Sub region by city	No ZIP at all, city list decides	ENRIQUE CHRISTOPHERSON
Northeast	A straightforward New York lead	DAVID ROSSI
Nebraska	One of the two that used to fall through	PRABAKAR MAHALINGAM
Utah	The other one	ENRIQUE CHRISTOPHERSON
Open territory	Nobody owns Florida yet	MACKENZIE SHELTON
Spam signals	Routed and flagged, never blocked	DAVID ROSSI

THE BUG PRABAKAR REPORTED

Leads with no state yet no longer land on the wrong rep

WHAT WAS HAPPENING

The rule only ran the moment a lead was created. Web forms fill the state a beat later, so it read an empty state, fell back to the default rep and never looked again. Nebraska and Utah leads were landing on the wrong person.

WHAT IT DOES NOW

It watches state, ZIP and city. A lead that arrives incomplete moves to the right rep the moment the data lands. A lead a real rep already owns is never taken away from them.

STILL OPEN FROM YOUR LIST

Reminders should also send email in production, escalation should rotate through reps instead of one fallback, the territory table should probably be admin only, and the lead capture forms still need to set the state. The national senior override is parked until you say otherwise.

THREE

AEDTS renewals

The third process from the dashboard. Built, tested on sample data, waiting on one file.

03

KARI'S BIGGEST RECURRING TASK

A day and a half of typing, down to about an hour of reviewing

TODAY

Kari pulls the AEDTS licence report every month, works out who is due, and creates each renewal in Odoo by hand. It is the single largest repeating job we found in Account Management.

WITH THE BATCH

The same report goes in. Every renewal comes out as a draft quotation with the right customer, tier, units and amount. Kari reviews the batch, fixes the exceptions and sends. Nothing is ever sent automatically.

WHAT WE NEED TO FINISH IT	FROM	WHY
One real monthly AEDTS licence export	Kari	To match your real accounts instead of sample rows
Tier prices and the renewal SKU	Kari	So the amount on each draft is right

WHAT WE NEED FROM THIS MEETING

Four things, three of them small

1

Beth runs the validator on her own work

The mail is with her. Nine example quotes are in the sandbox and every point from her review is in. The one thing we would like checked is the thirteen model families, because that is the only place we still made a judgement call.

2

Prabakar confirms the territory owners

His own edits died with the old sandbox and cannot be recovered. What is in there now is our reconstruction from the July session, so it needs his eyes before anyone treats it as live.

3

Kari sends one AEDTS export

That unblocks the third process. Everything else for it is built.

4

Decide who owns the collateral question

A hundred and fifty two open quotes have an AED without a poster, tag or decal. That is now the biggest single thing the validator reports and it is a business decision, not a technical one.

NEXT STEP

Test it on real work, then we turn on enforcement

Both processes are built and running. What decides whether they are right is your team using them for a week, not another demo from us.

SANDBOX

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WAITING ON

Beth, Prabakar, Kari

THEN

Enforcement on confirm