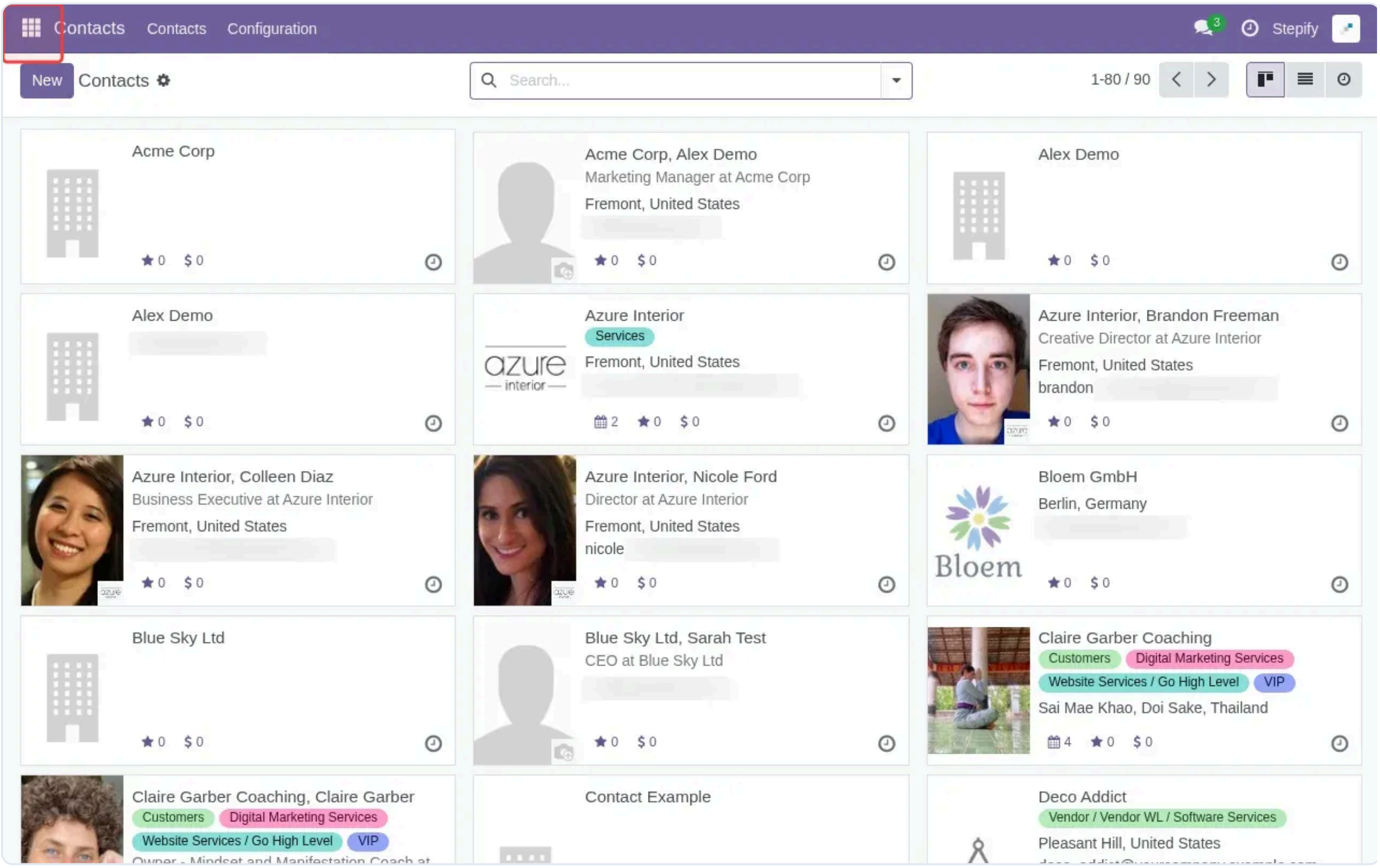
Stepify

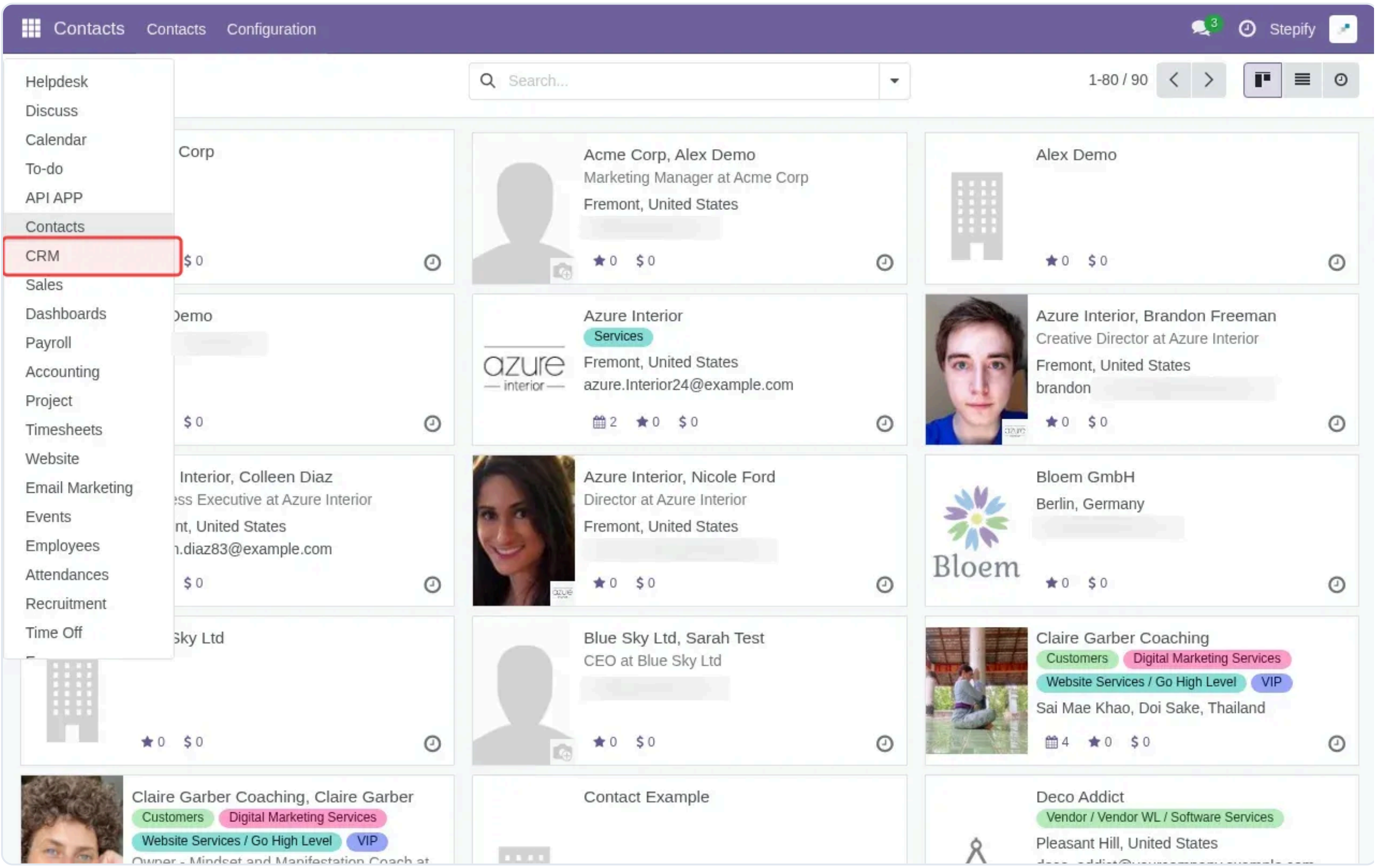
How to add a lead to the pipeline in Odoo

Odoo CRM 6 steps · 1m 53s

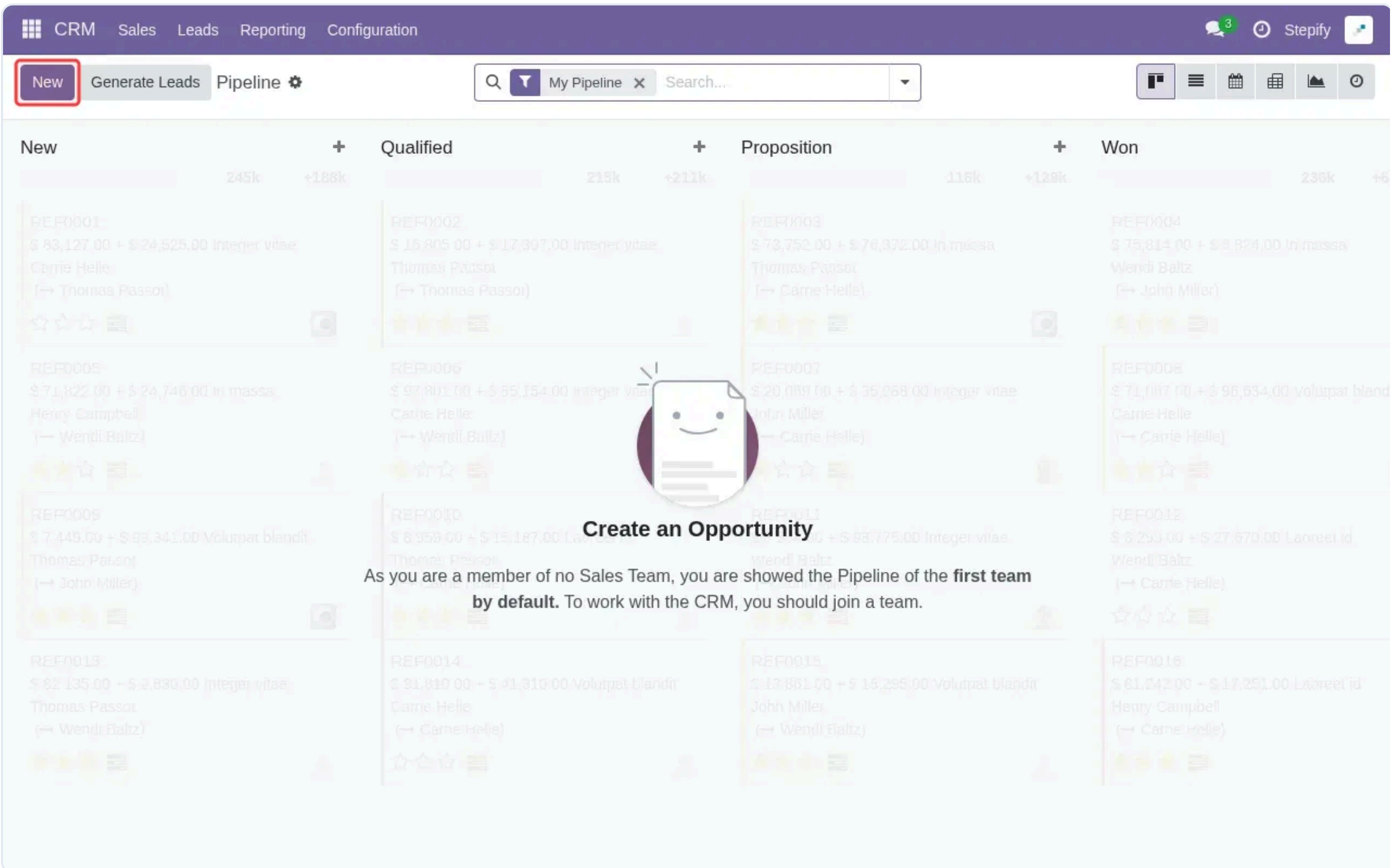
1 Click the app switcher grid icon to open menu.



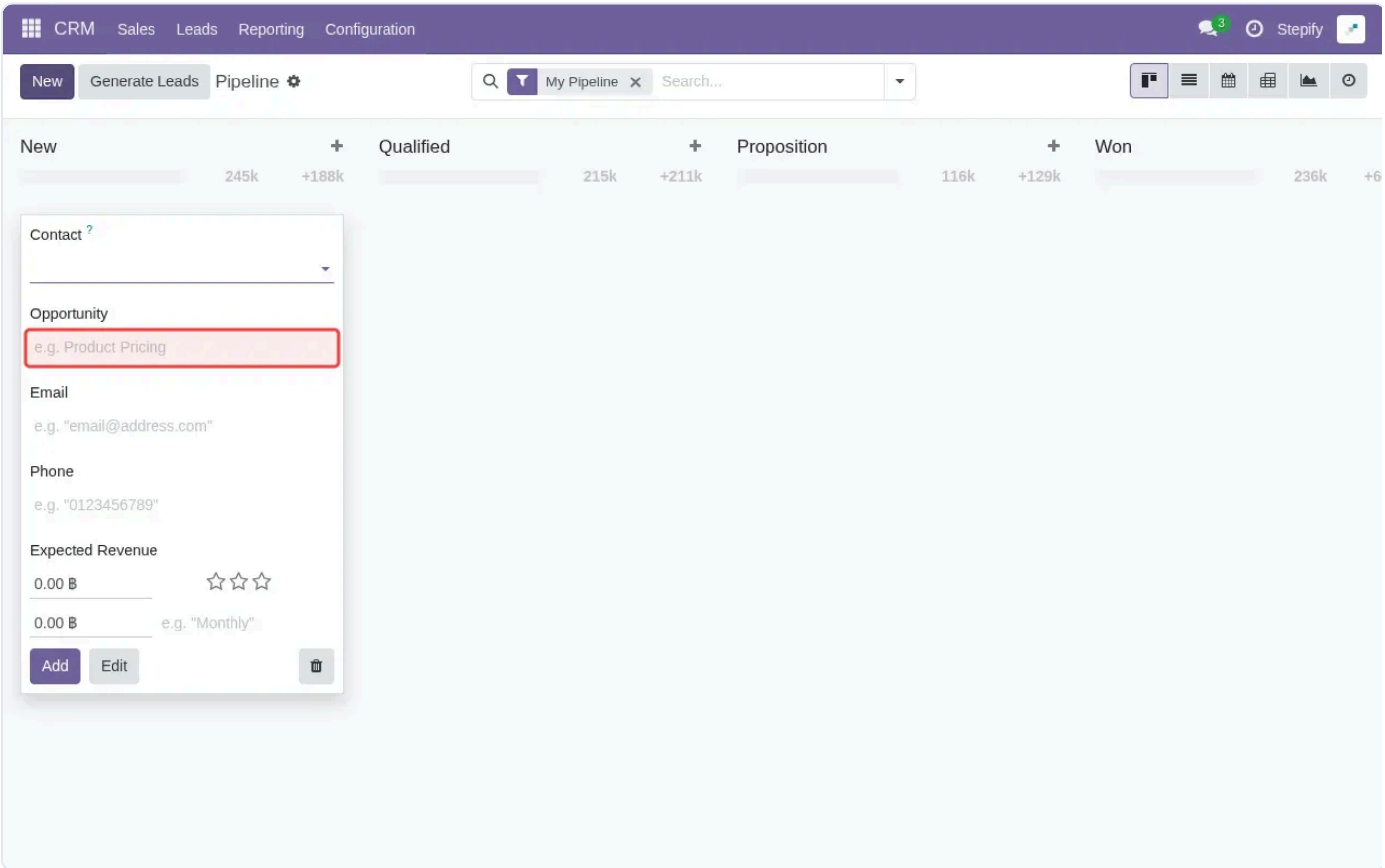
2 Click 'CRM' in the sidebar to access the pipeline.



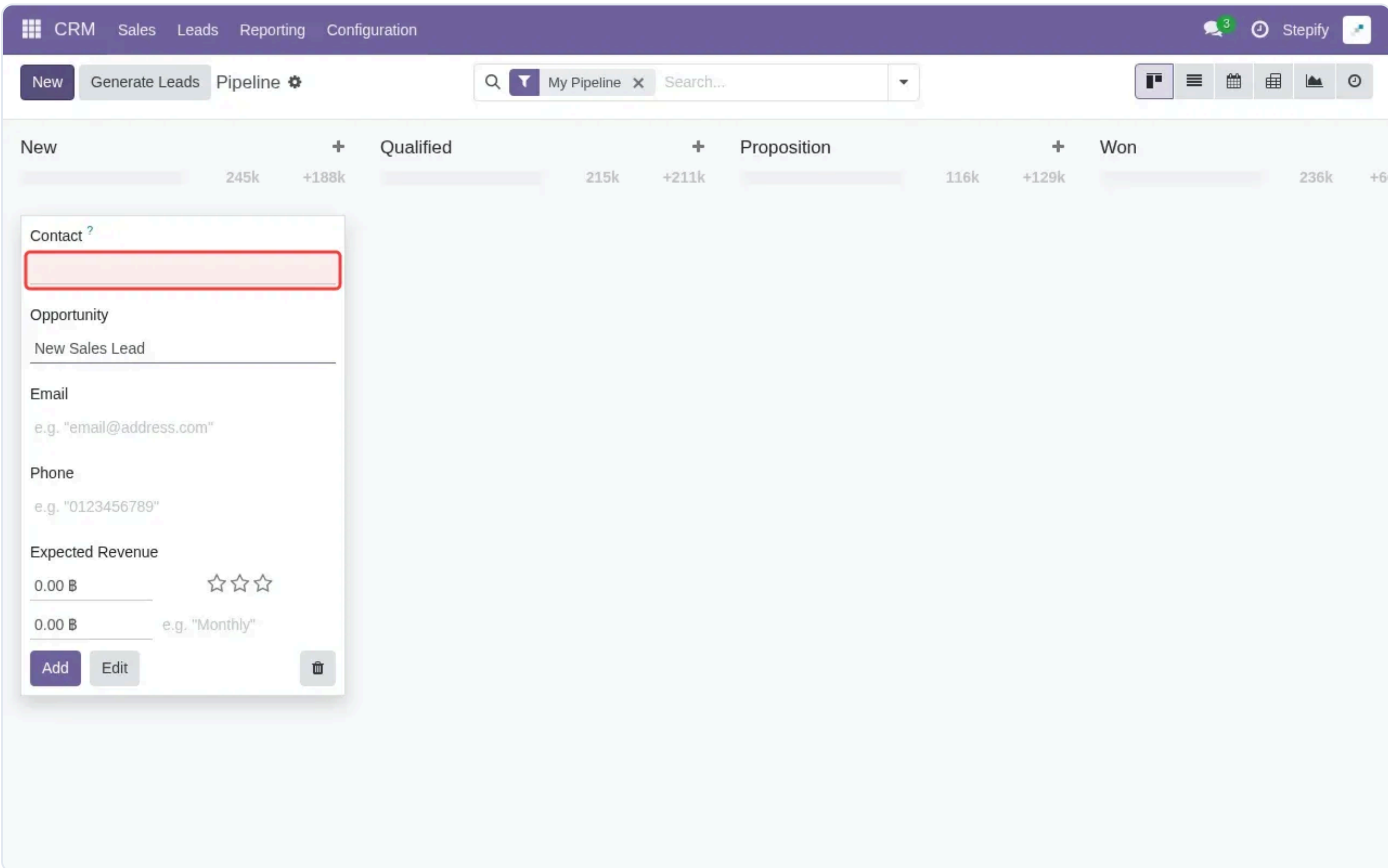
3 Click 'New' button to create a new lead.



4 **Type 'New Sales Lead' in the Opportunity field.**



5 **Type 'John Smith' in the Contact field.**



6 Click 'Add' button to save the new lead.