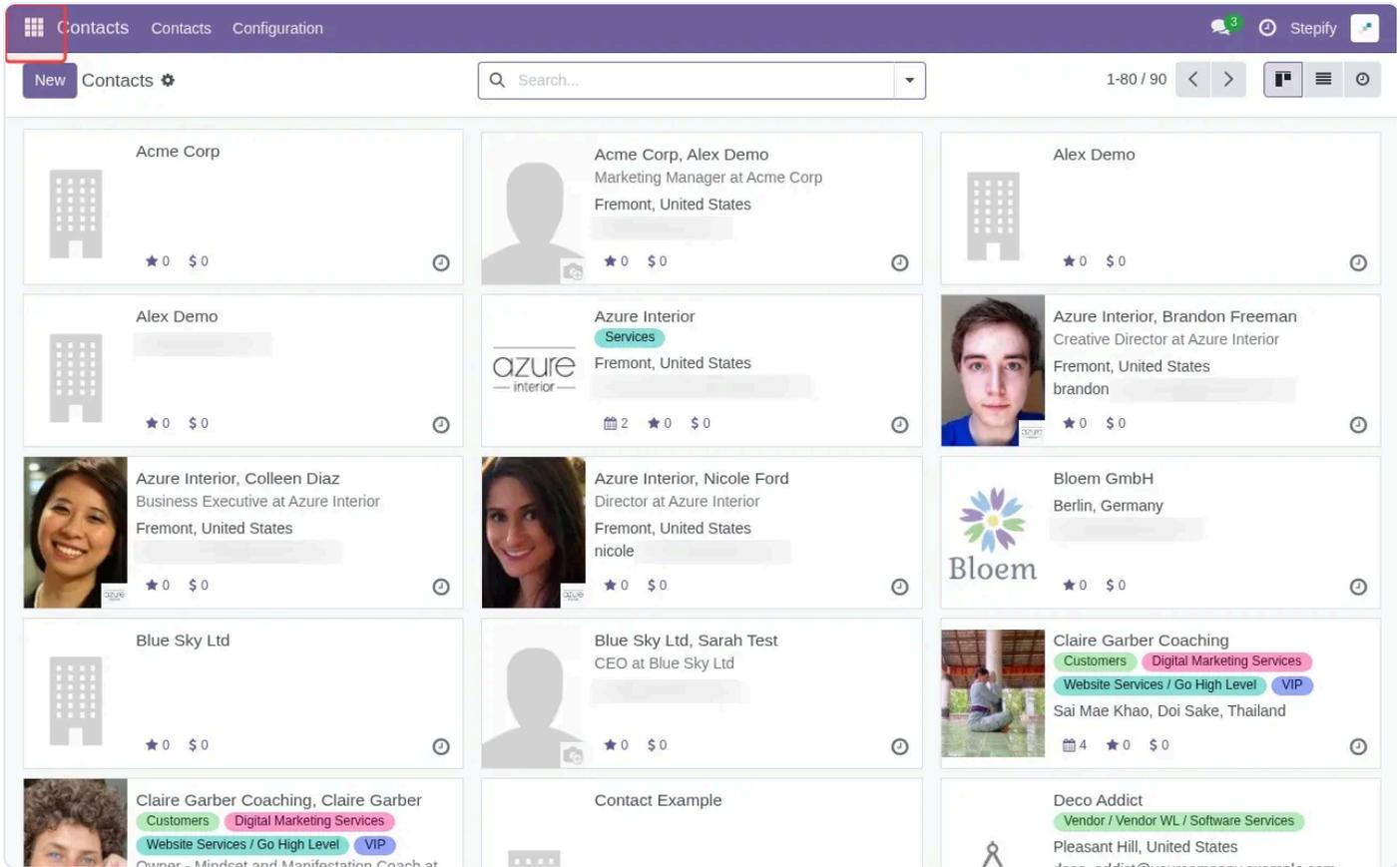


# How to add a lead to the pipeline in Odoo

Odoo CRM 6 steps · 1m 53s

1 Click the app switcher grid icon to open menu.



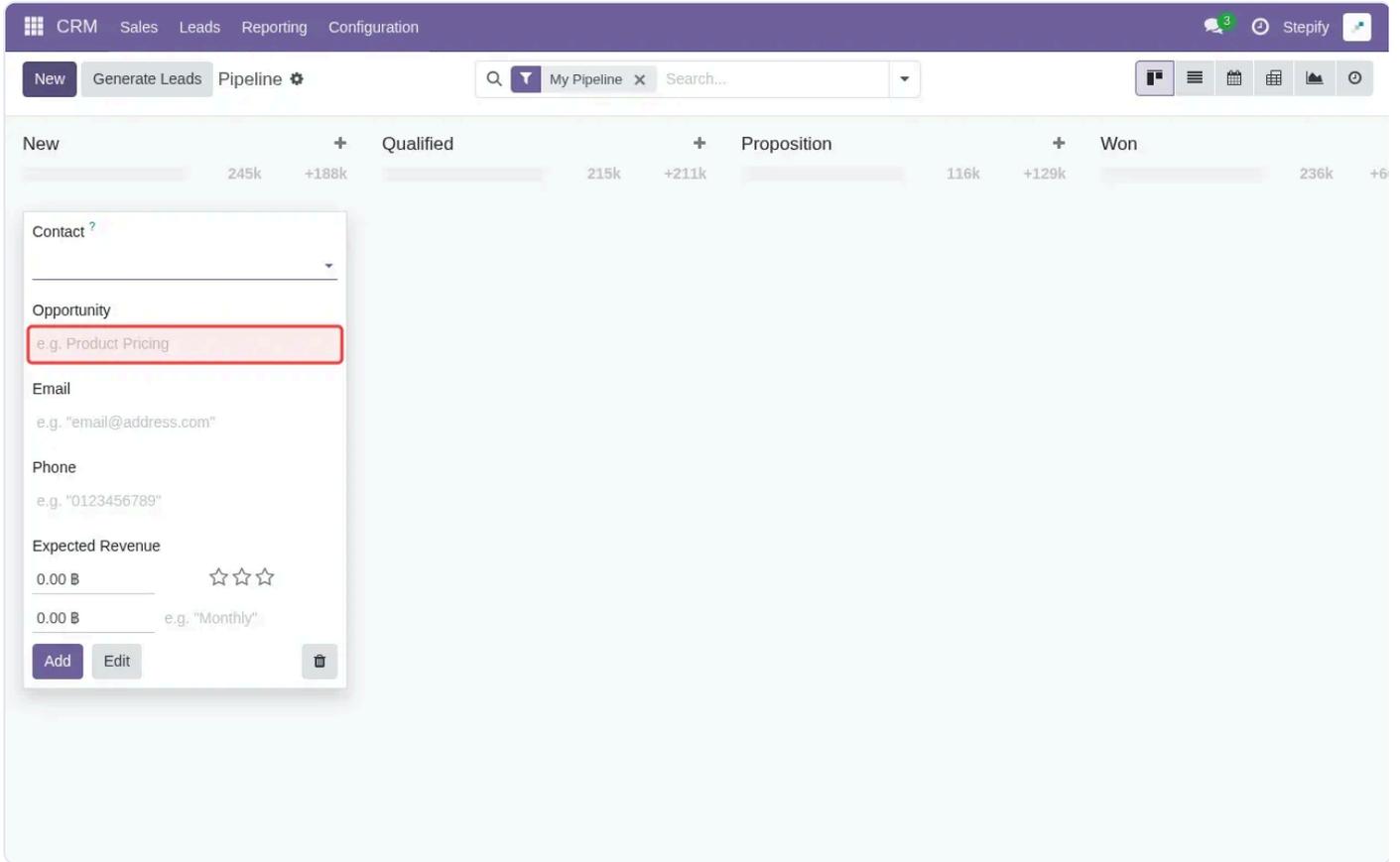
## 2 Click 'CRM' in the sidebar to access the pipeline.

The screenshot shows the CRM application interface. On the left, a sidebar menu lists various modules, with 'CRM' highlighted in red. The main area displays a grid of contact cards. Each card includes a profile picture, company name, contact name, title, location, and a star rating with a dollar sign (e.g., ★ 0 \$ 0). The cards are for Acme Corp, Azure Interior, Bloem GmbH, and Blue Sky Ltd.

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

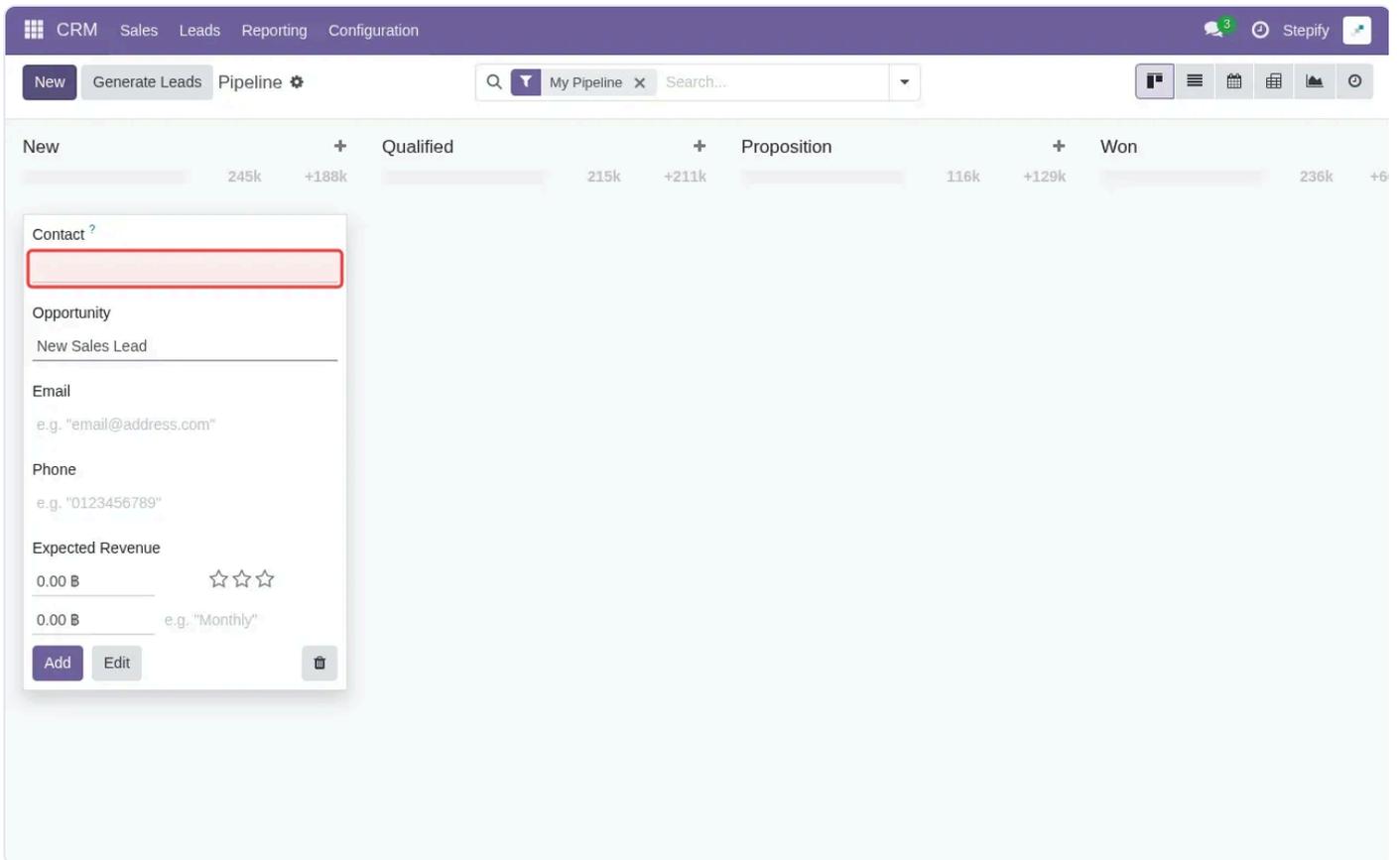
The screenshot shows the CRM Pipeline view. The 'New' button is highlighted in red. The pipeline is divided into four stages: New, Qualified, Proposition, and Won. Each stage contains a list of leads with their IDs, names, and contact information. A central overlay with a document icon reads 'Create an Opportunity' and states: 'As you are a member of no Sales Team, you are showed the Pipeline of the first team by default. To work with the CRM, you should join a team.'

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



The screenshot shows a CRM interface with a pipeline view. The pipeline stages are New (245k), Qualified (215k), Proposition (116k), and Won (236k). A modal form is open for creating a new opportunity. The 'Opportunity' field is highlighted with a red border and contains the text 'e.g. Product Pricing'. Other fields include 'Contact ?' (empty), 'Email' (e.g. 'email@address.com'), 'Phone' (e.g. '0123456789'), and 'Expected Revenue' (0.00 B with a star rating). The 'Add' button is highlighted in blue.

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



The screenshot shows the same CRM pipeline view as above. The modal form is open, and the 'Contact ?' field is highlighted with a red border and is empty. The 'Opportunity' field now contains the text 'New Sales Lead'. All other fields and buttons remain the same as in the previous screenshot.

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

The screenshot displays a CRM pipeline interface with the following elements:

- Navigation Bar:** CRM, Sales, Leads, Reporting, Configuration. Stepify logo and notification icon (3) are on the right.
- Pipeline Header:** New, Generate Leads, Pipeline (gear icon). Search bar: My Pipeline x Search...
- Pipeline Stages:** New (245k, +188k), Qualified (215k, +211k), Proposition (116k, +129k), Won (236k, +6k).
- Search Dropdown:** Contact ? John Smith. List of results: John Smith (multiple), Create "John Smith", Search More..., Create and edit..., SMITH AND JOHN LIMITED PARTNERSHIP, PHRA PRADAENG, JOHN SMITH RECRUITMENT COMPANY LIMITED, PATHUM WAN. Search Worldwide (globe icon).
- Action Buttons:** Add (highlighted with a red box), Edit, and a trash icon.