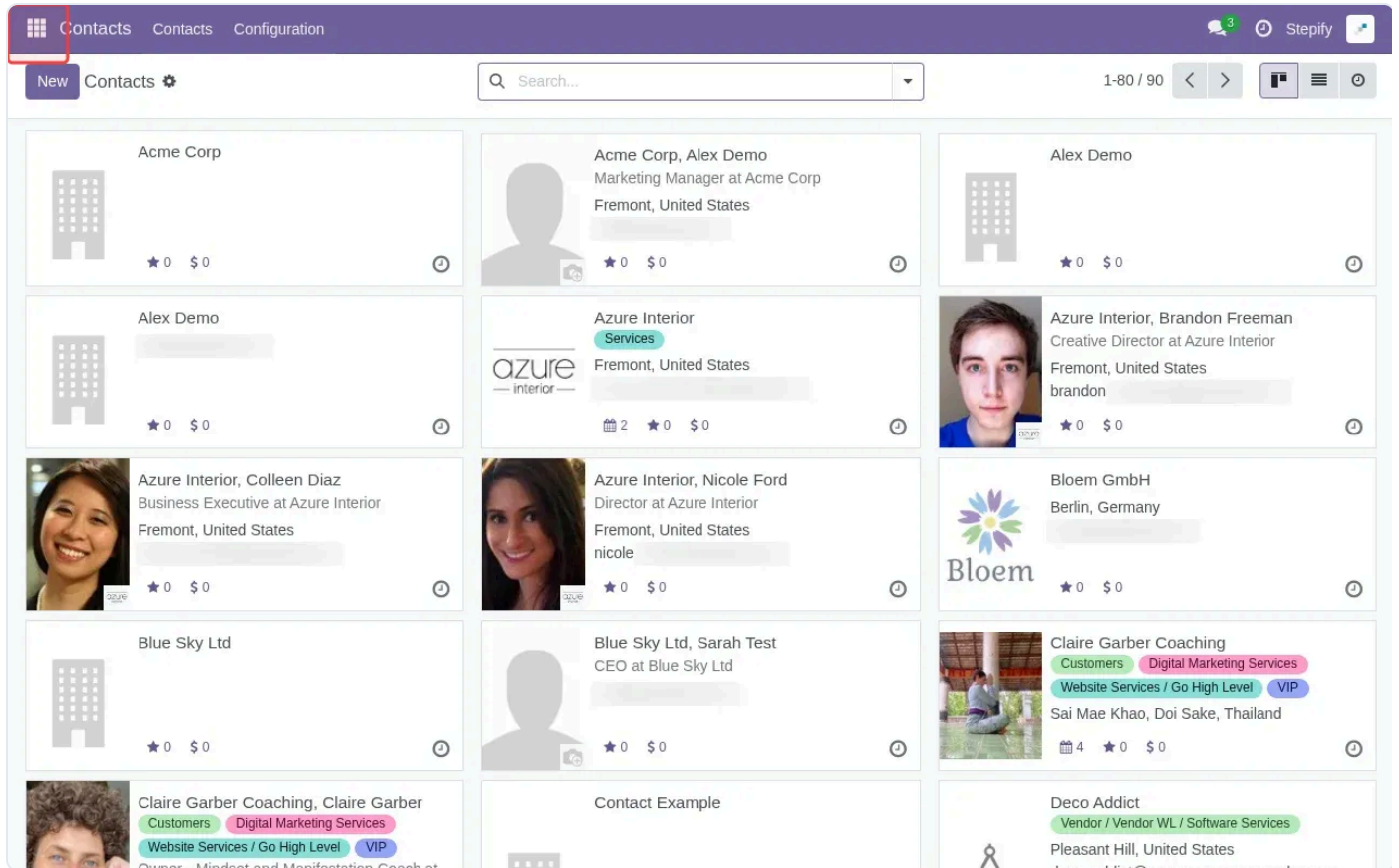


How to add a lead to the pipeline in Odoo

Odoo CRM 6 steps · 1m 53s

1 Click the app switcher grid icon to open menu.



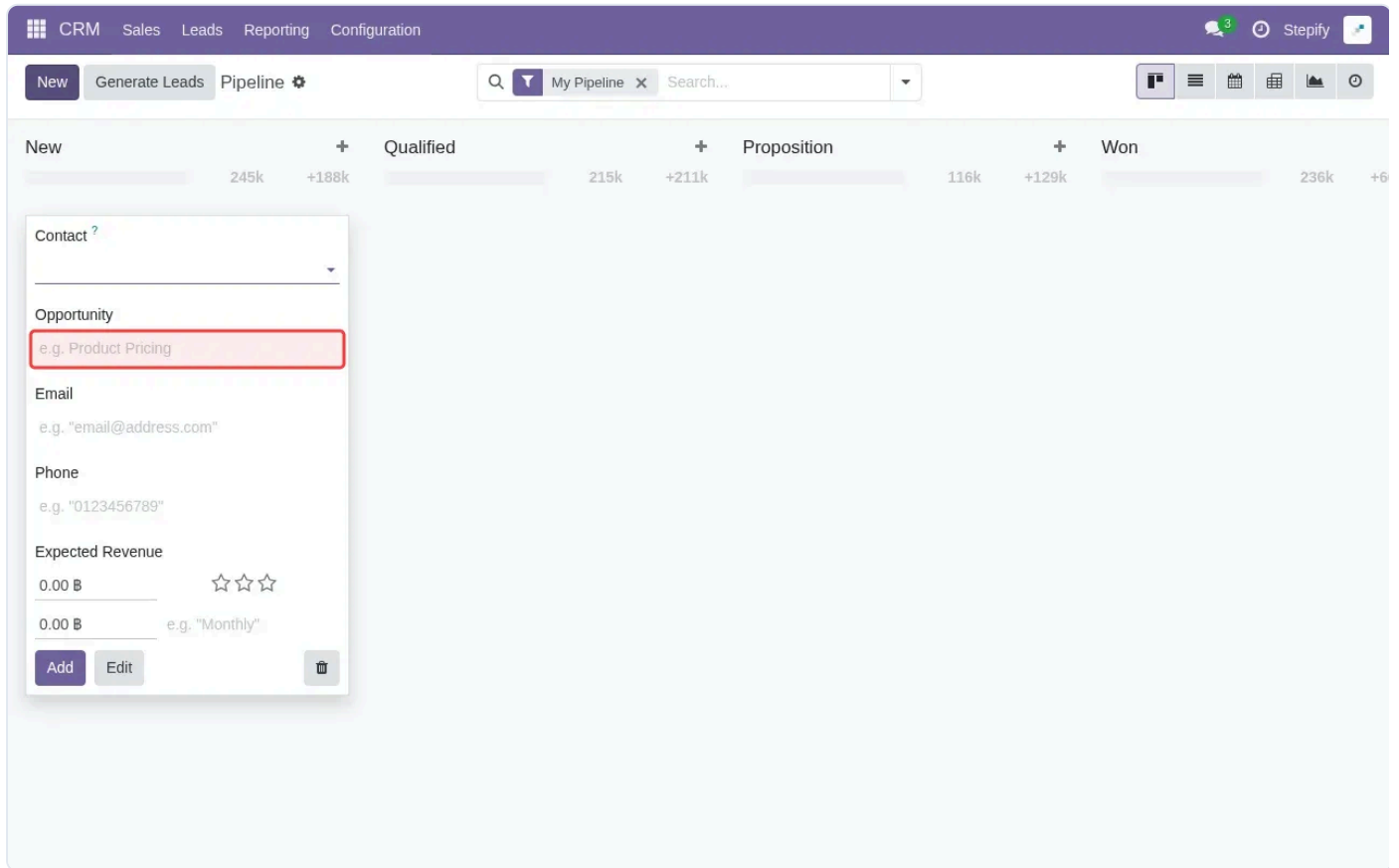
2 Click 'CRM' in the sidebar to access the pipeline.

The screenshot shows the CRM application interface. On the left, a sidebar menu is open, highlighting the 'CRM' option. The main area displays a grid of contact cards. Each card includes a profile picture, name, title, company, location, and contact information. Some cards also show a star rating and a dollar amount. The top navigation bar includes 'Contacts', 'Configuration', and a search bar. The top right corner shows a notification icon with '3' and the 'Stepify' logo.

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

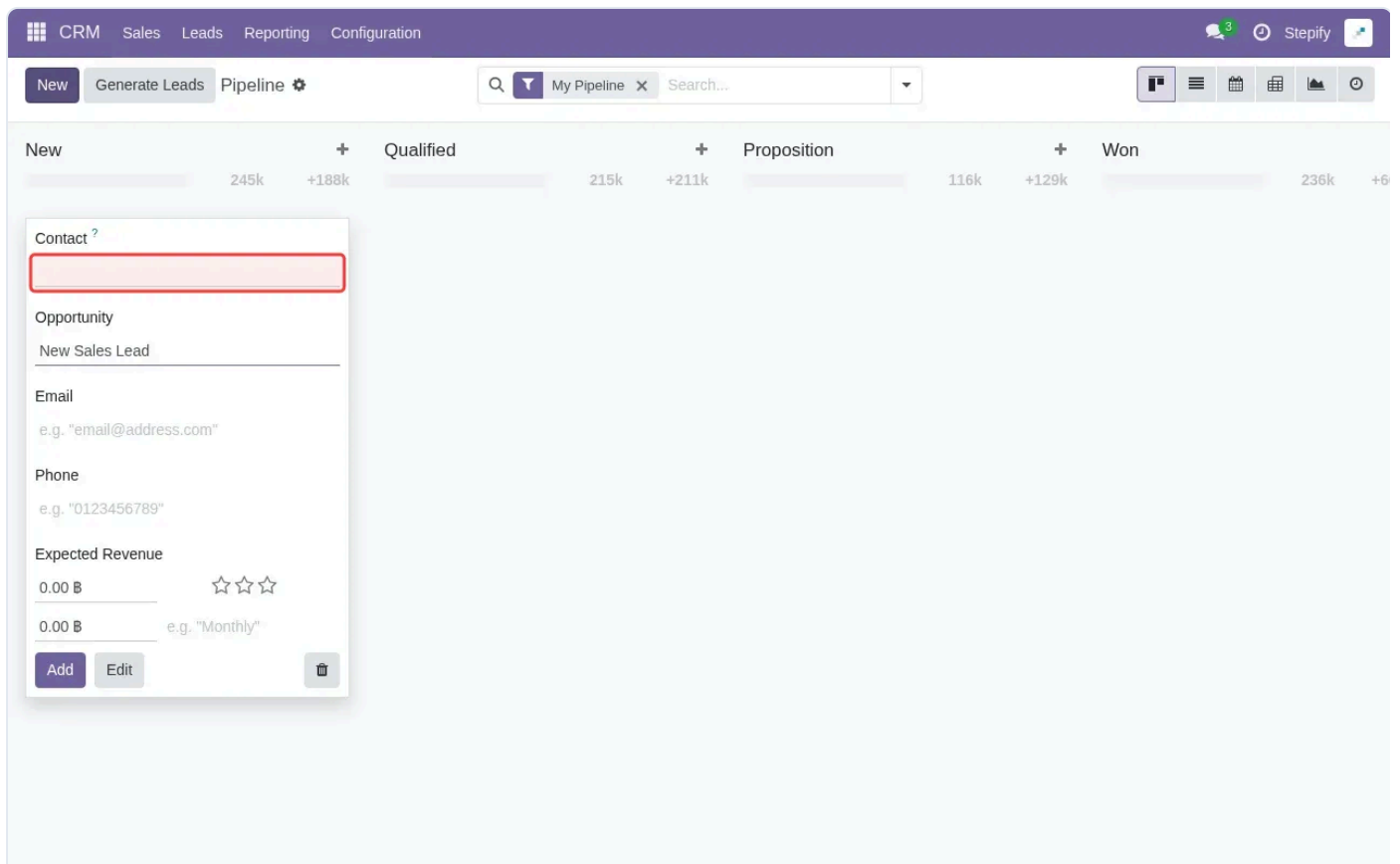
The screenshot shows the CRM Pipeline view. The top navigation bar includes 'CRM', 'Sales', 'Leads', 'Reporting', and 'Configuration'. The left sidebar has a 'New' button highlighted. The main area displays a pipeline with four stages: 'New', 'Qualified', 'Proposition', and 'Won'. Each stage contains a list of leads with details such as lead ID, name, company, location, and contact information. A central overlay with a document icon and the text 'Create an Opportunity' is visible. Below the overlay, a message 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 purple header bar containing navigation links: CRM, Sales, Leads, Reporting, and Configuration. On the right of the header are icons for chat (3), a clock, and the Stepify logo. Below the header is a sub-header with tabs: New, Generate Leads, and Pipeline (selected). A search bar contains 'My Pipeline' and a search icon. The main area displays a pipeline with stages: New (245k, +188k), Qualified (215k, +211k), Proposition (116k, +129k), and Won (236k, +6k). A modal form is open on the left, titled 'Contact ?'. It has fields for Opportunity (highlighted with a red box and containing 'e.g. Product Pricing'), Email (e.g. 'email@address.com'), Phone (e.g. '0123456789'), and Expected Revenue (0.00 B, with three stars and a frequency dropdown set to 'Monthly'). At the bottom of the modal are 'Add' and 'Edit' buttons, and a trash icon.

5 Type 'John Smith' in the Contact field.



This screenshot is identical to the previous one, showing the same CRM interface and pipeline view. The modal form is open, but in this step, the 'Contact ?' field at the top of the modal is highlighted with a red box, indicating where to enter 'John Smith'. The 'Opportunity' field below it now contains the text 'New Sales Lead'.

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

CRM Sales Leads Reporting Configuration

Stepify

NewGenerate LeadsPipeline

My Pipeline

Search...

New

245k

+188k

Qualified

215k

+211k

Proposition

116k

+129k

Won

236k

+6

Contact ?

John Smith

John Smith

John Smith

John Smith

John Smith

John Smith

John Smith

Create "John Smith"

Search More...

Create and edit...

SMITH AND JOHN LIMITED PARTNERSHIP, PHRA PRADAENG

JOHN SMITH RECRUITMENT COMPANY LIMITED, PATHUM WAN

Search Worldwide

AddEdit