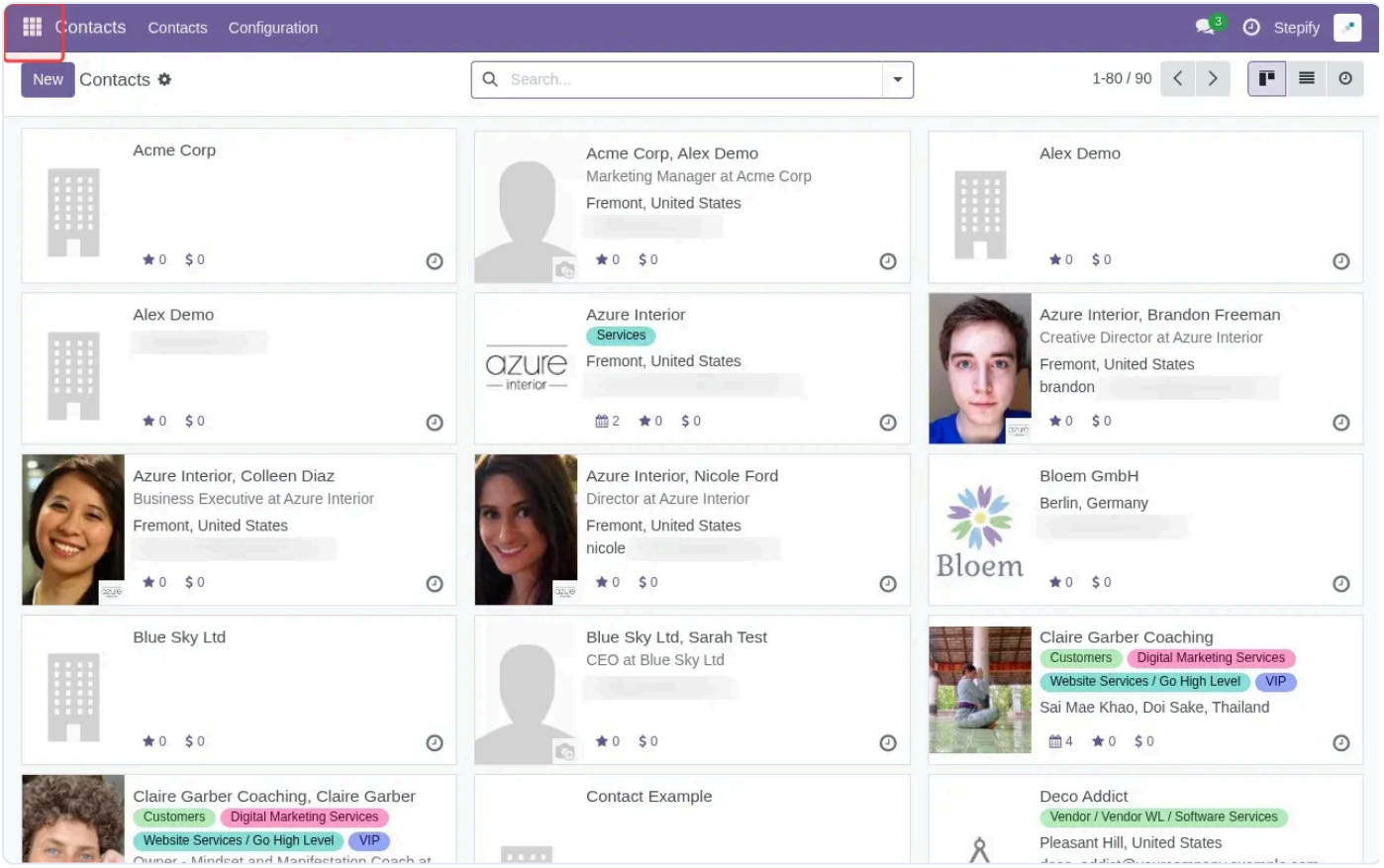
Stepify

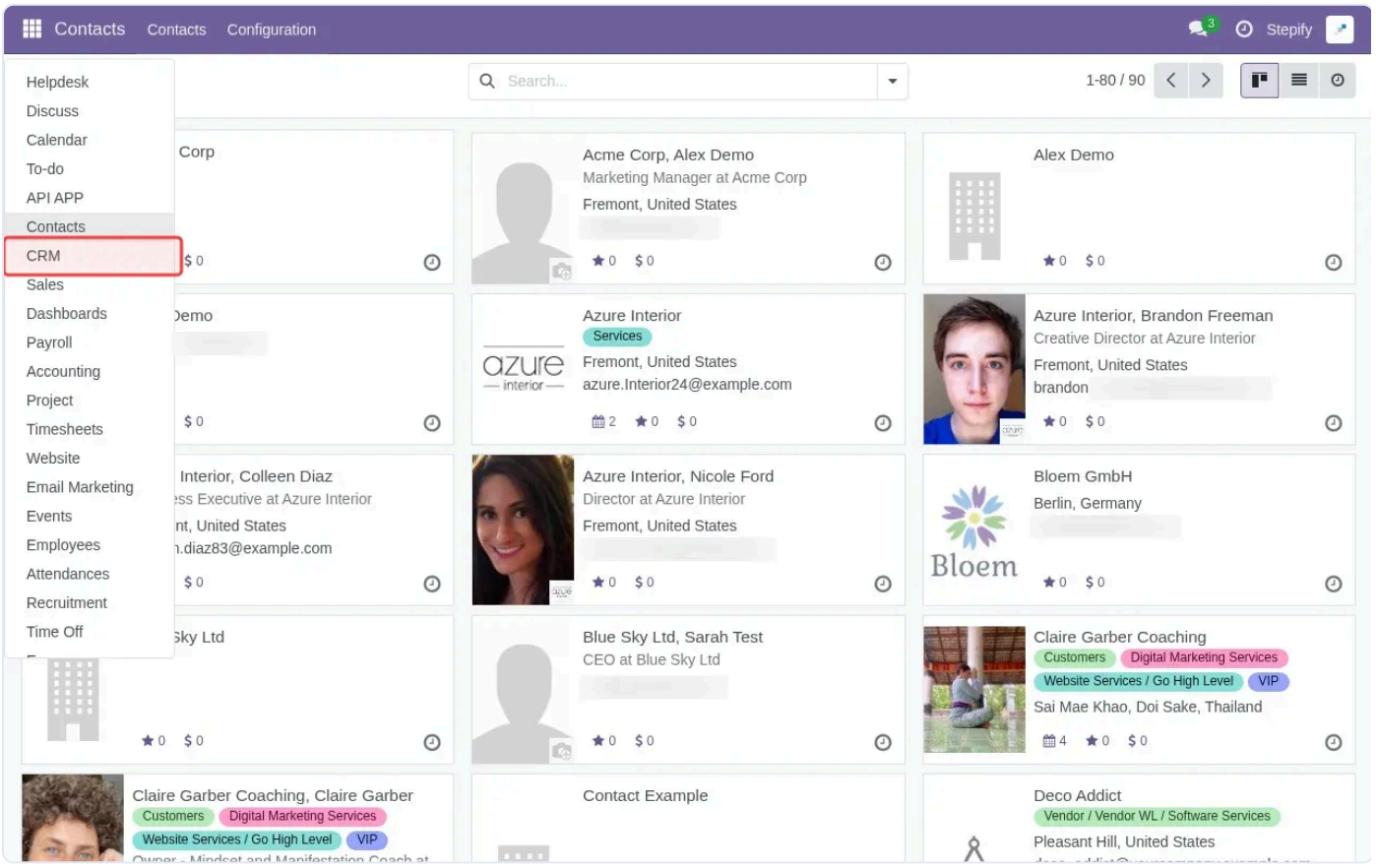
How to add a lead to the pipeline in Odoo

Odoo CRM 7 steps · 1m 52s

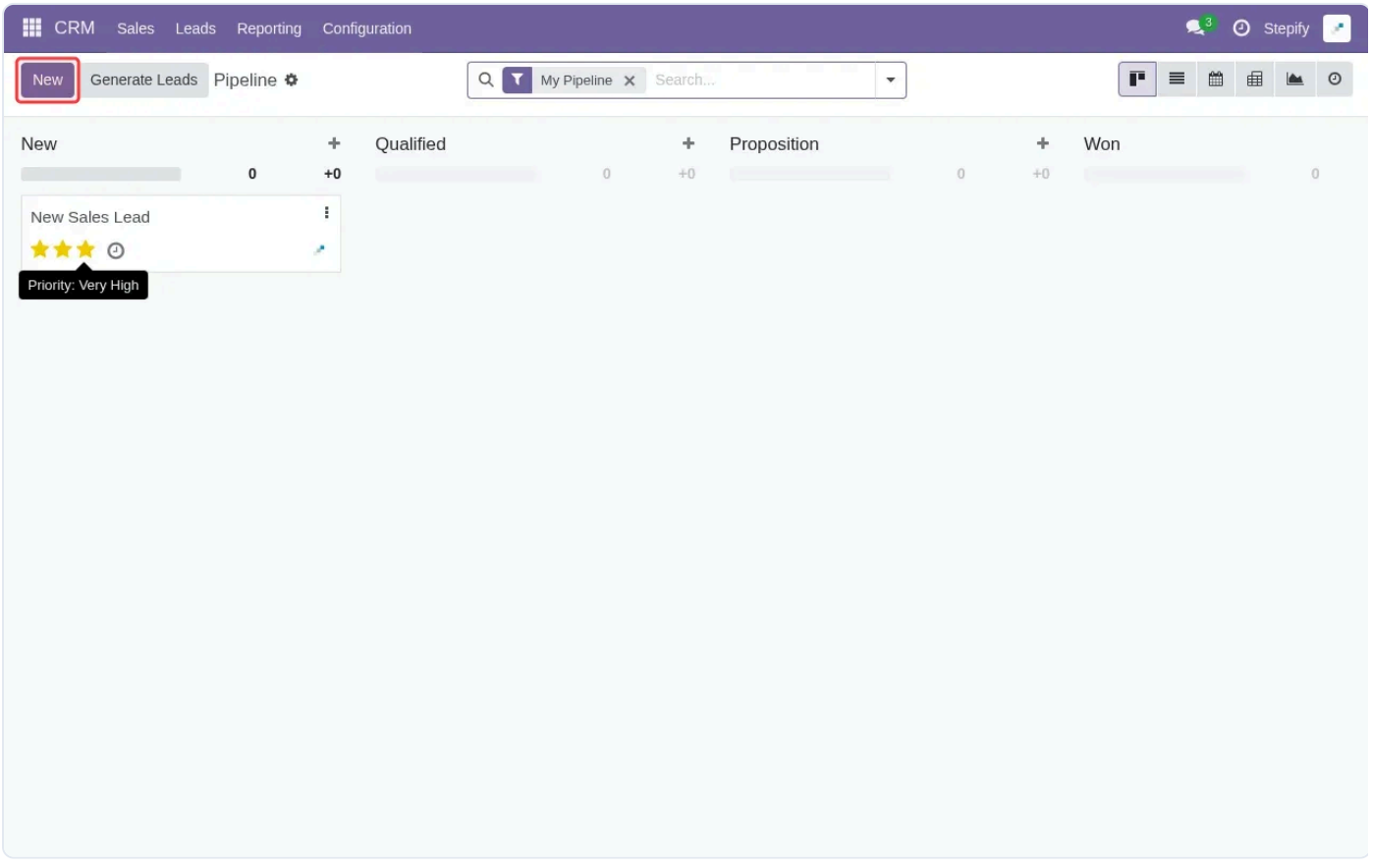
1 Click app switcher to access CRM app.



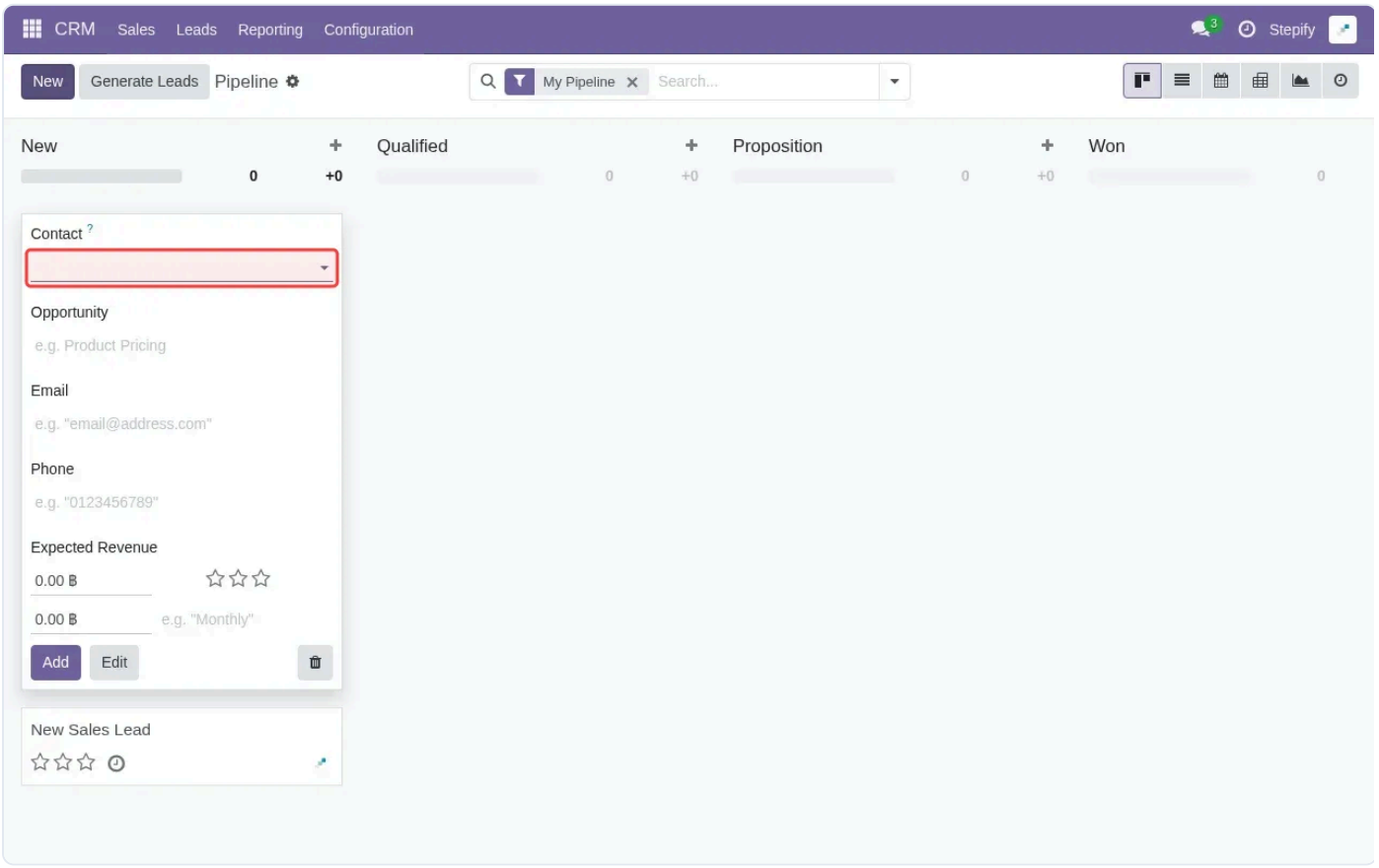
2 Click 'CRM' in the sidebar to access the CRM module.



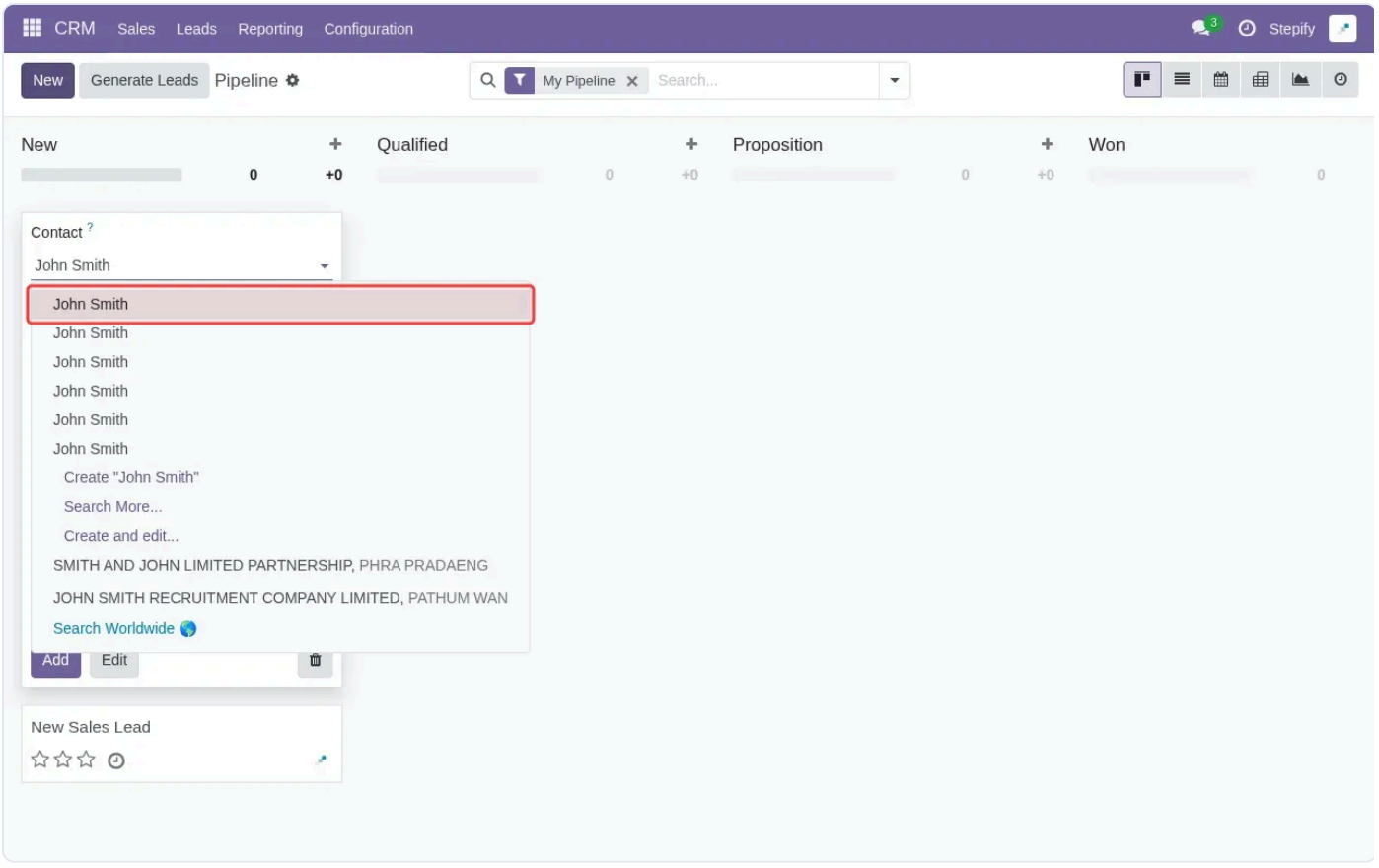
3 Click 'New' button to create a new lead.



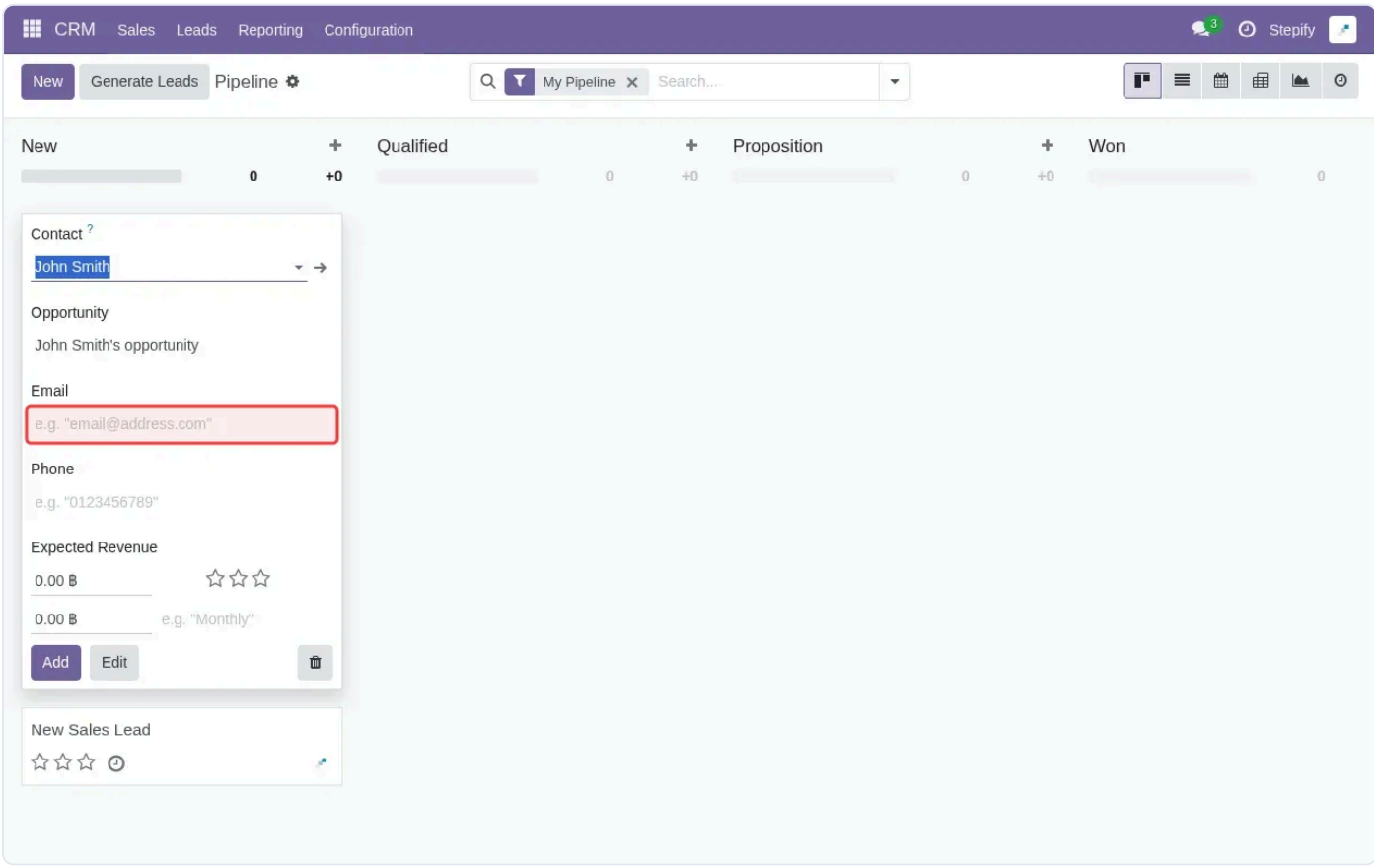
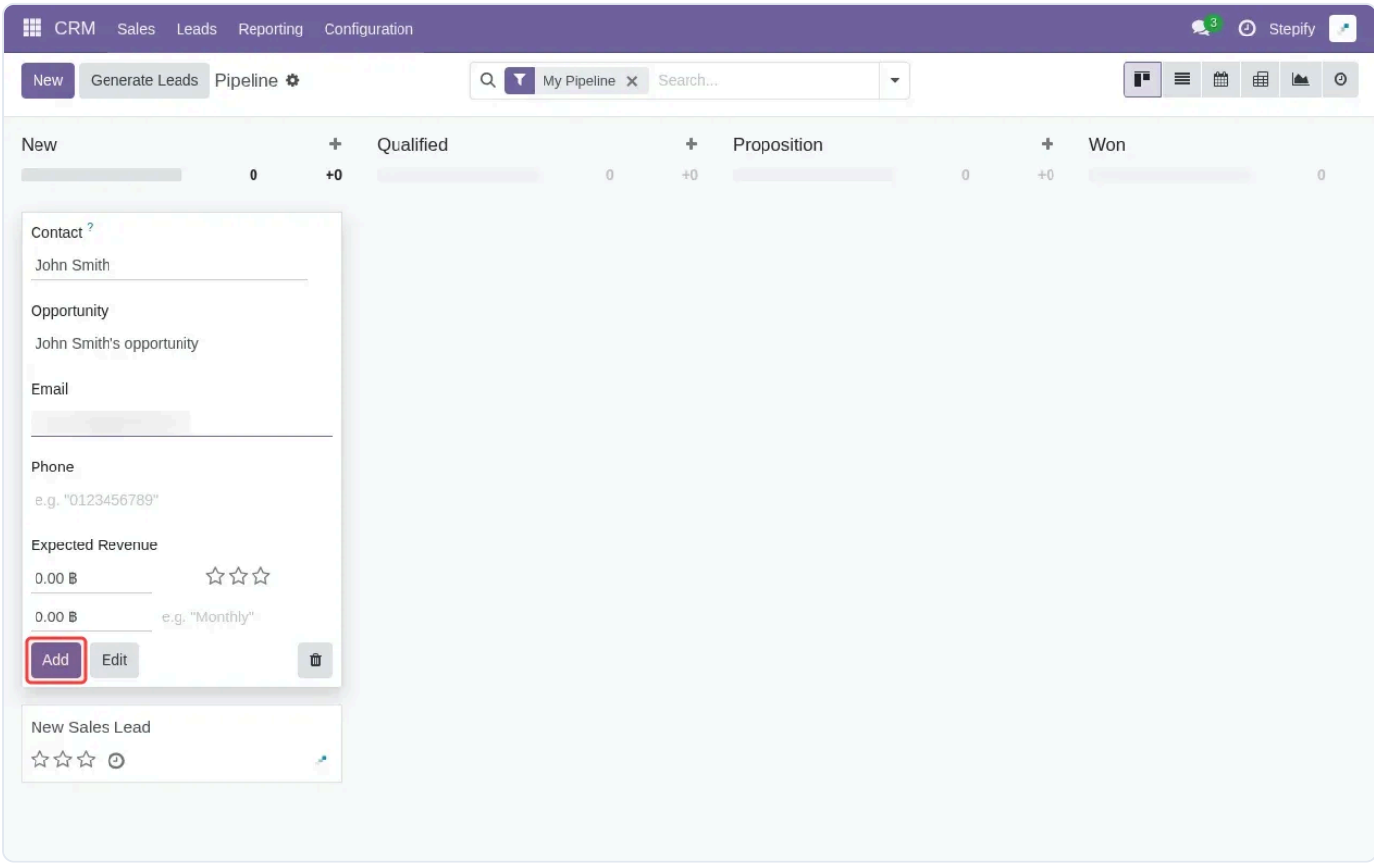
4 Type contact name in the Contact field.



5 Select 'John Smith' from the dropdown options.



6 Type email address in the Email field.



7 Click 'Add' button to save the lead to pipeline.