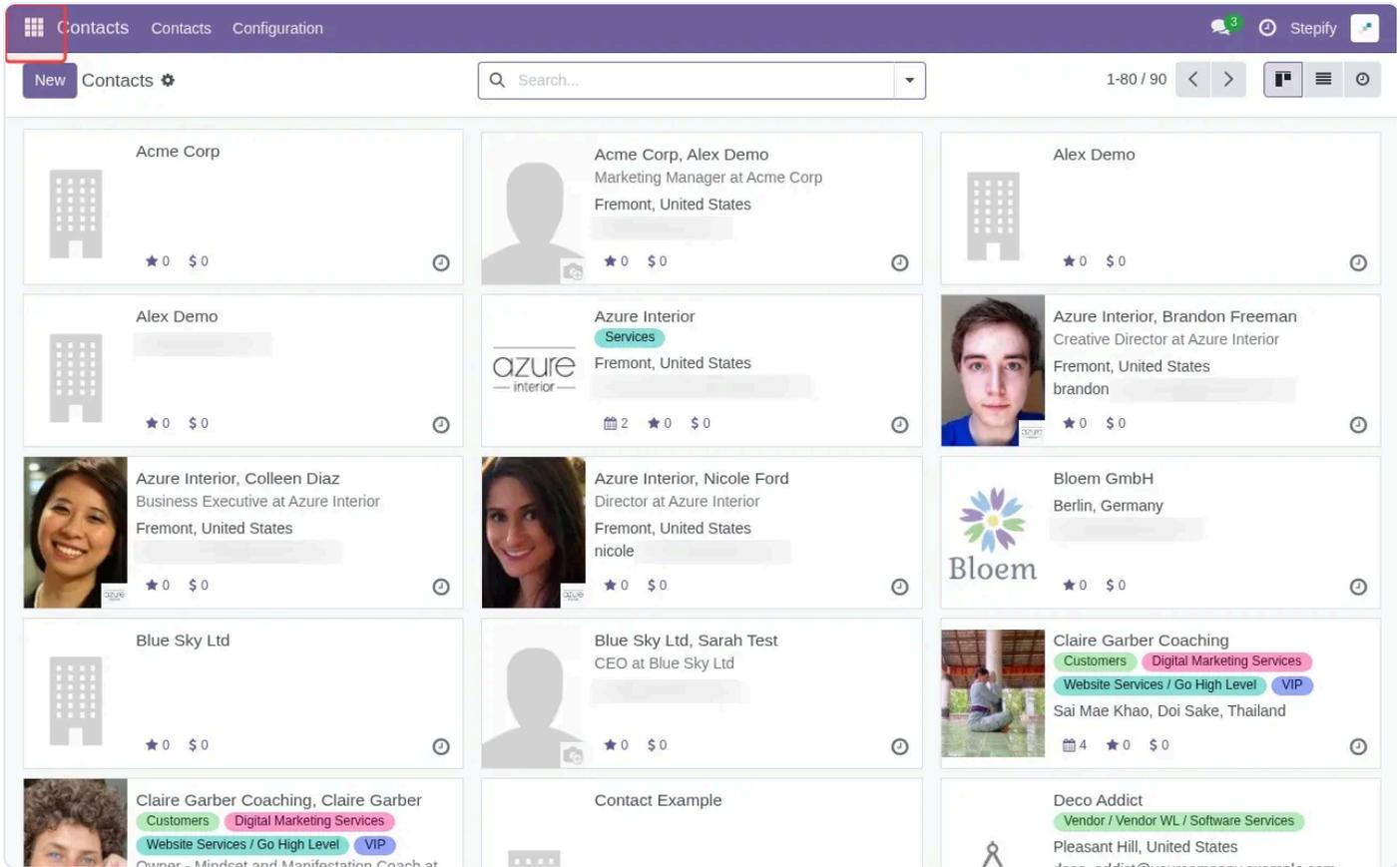


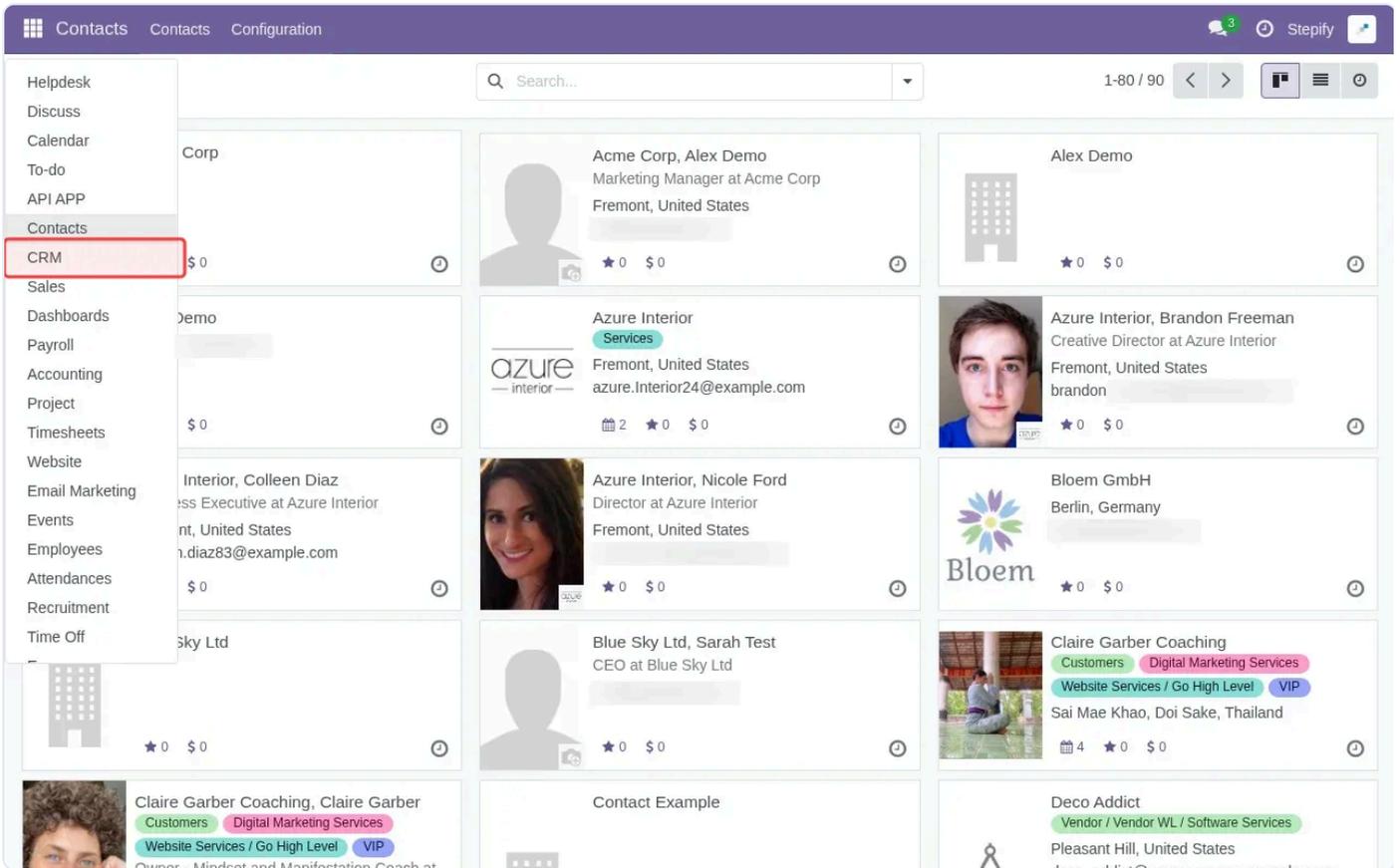
# How to add a lead to the pipeline in Odoo

Odoo CRM 7 steps · 1m 52s

## 1 Click app switcher to access CRM app.



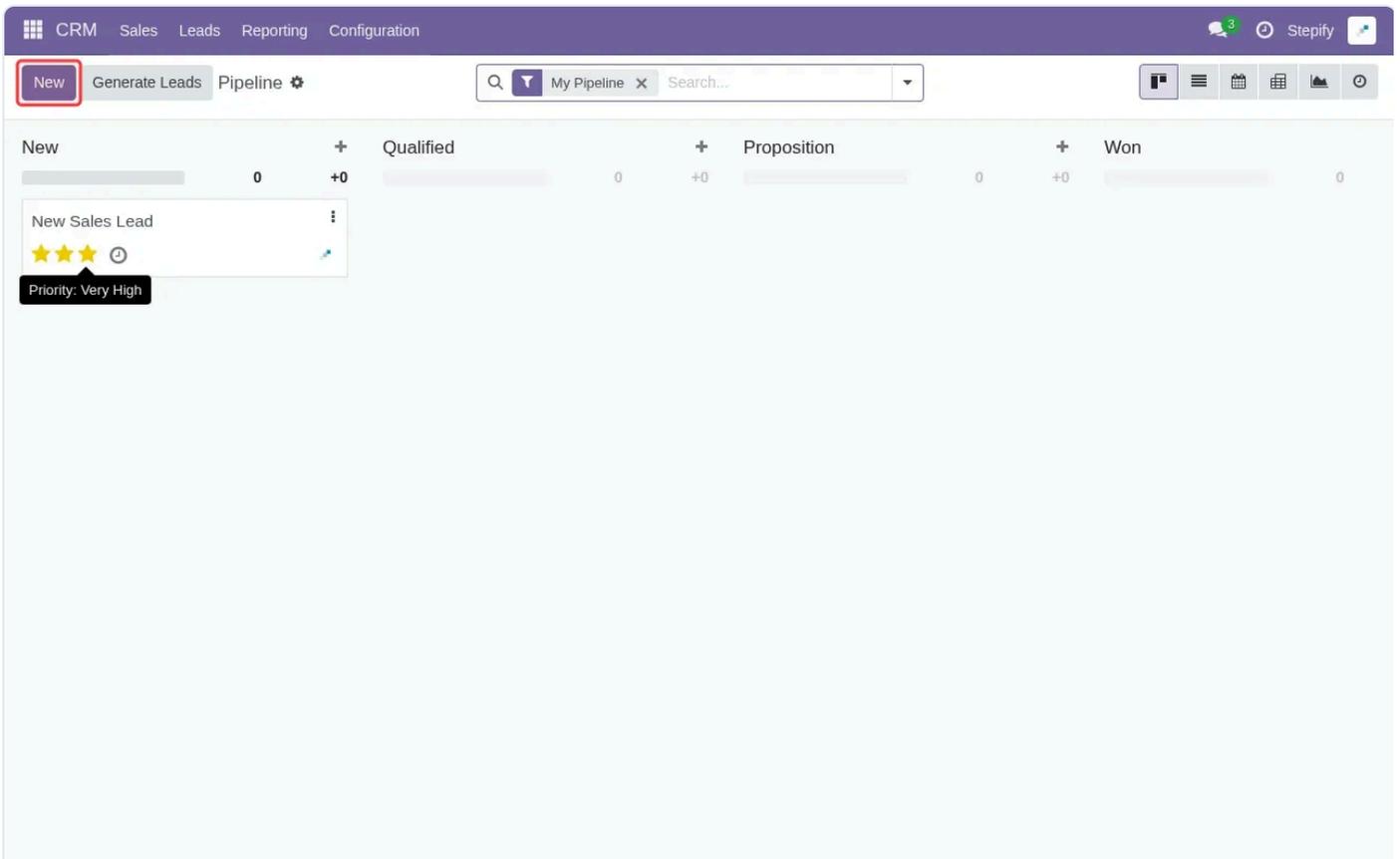
## 2 Click 'CRM' in the sidebar to access the CRM module.



The screenshot shows the CRM module interface. The top navigation bar includes 'Contacts', 'Configuration', and 'Stepify'. A sidebar on the left lists various modules, with 'CRM' highlighted in red. The main area displays a grid of contact cards. Each card shows a contact's name, title, company, location, and a star rating. The cards include:

- Acme Corp, Alex Demo (Marketing Manager at Acme Corp, Fremont, United States)
- Azure Interior Services (Fremont, United States, azure.Interior24@example.com)
- Azure Interior, Nicole Ford (Director at Azure Interior, Fremont, United States)
- Bloem GmbH (Berlin, Germany)
- Blue Sky Ltd, Sarah Test (CEO at Blue Sky Ltd)
- Claire Garber Coaching (Customers, Digital Marketing Services, Website Services / Go High Level, VIP, Sai Mae Khao, Doi Sake, Thailand)
- Deco Addict (Vendor / Vendor WL / Software Services, Pleasant Hill, United States)

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



The screenshot shows the CRM 'Leads' module interface. The top navigation bar includes 'CRM', 'Sales', 'Leads', 'Reporting', and 'Configuration'. A sidebar on the left lists various modules, with 'New' highlighted in red. The main area displays a pipeline view with stages: 'New', 'Qualified', 'Proposition', and 'Won'. The 'New' stage is currently empty, and a 'New Sales Lead' button is visible. The pipeline view shows the following data:

Stage	Count	Change
New	0	+0
Qualified	0	+0
Proposition	0	+0
Won	0	+0

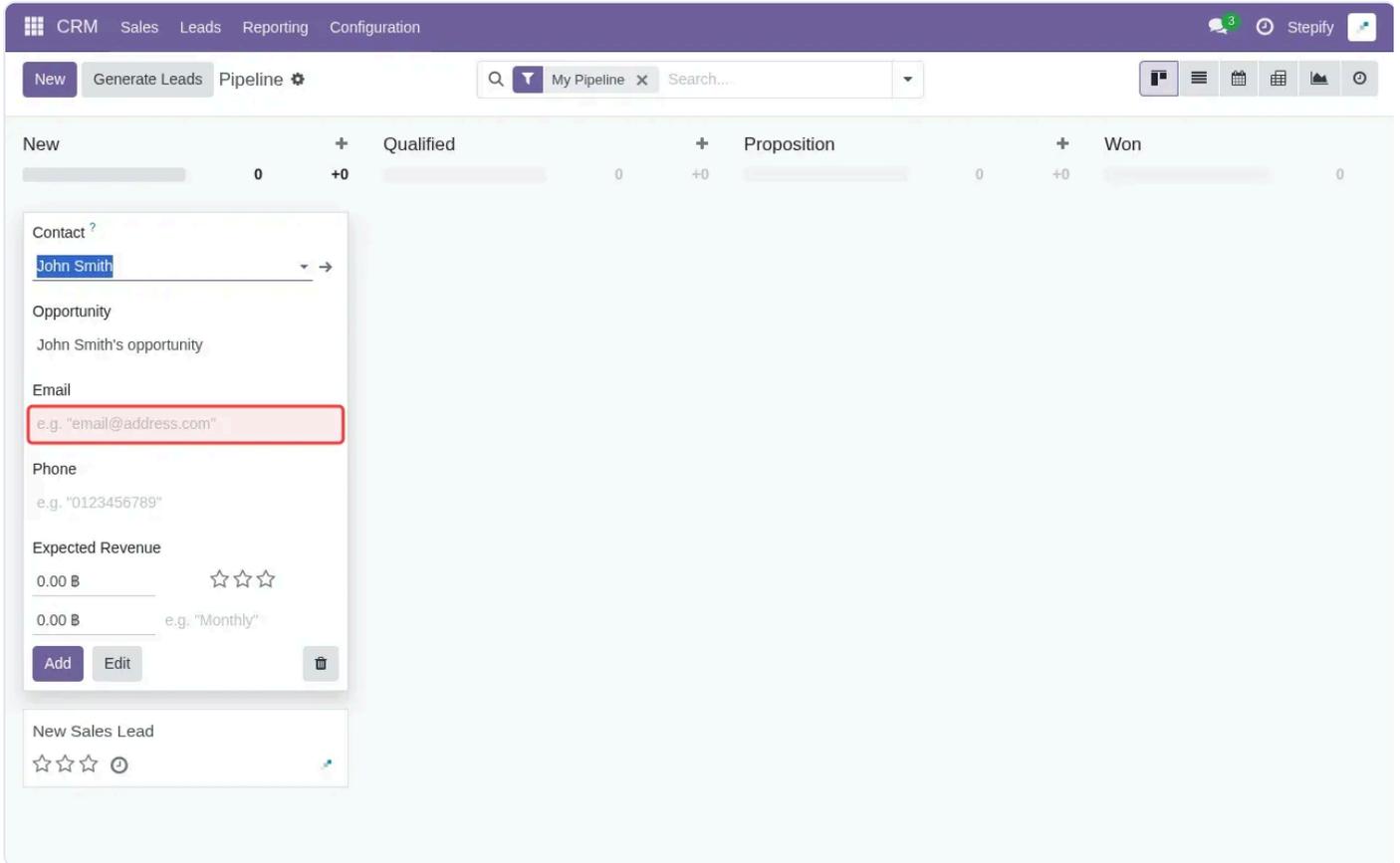
#### 4 Type contact name in the Contact field.

The screenshot shows the CRM Pipeline interface. At the top, there are navigation tabs for CRM, Sales, Leads, Reporting, and Configuration. A search bar contains 'My Pipeline' and a search icon. Below the navigation, there are four stages: New, Qualified, Proposition, and Won, each with a progress bar and a count of 0. A dropdown menu is open for the 'Contact ?' field, showing a search bar and several input fields: Opportunity (e.g. Product Pricing), Email (e.g. "email@address.com"), Phone (e.g. "0123456789"), and Expected Revenue (0.00 B with a star rating). At the bottom of the dropdown are 'Add', 'Edit', and 'Delete' buttons. Below the dropdown is a 'New Sales Lead' section with a star rating and a refresh icon.

#### 5 Select 'John Smith' from the dropdown options.

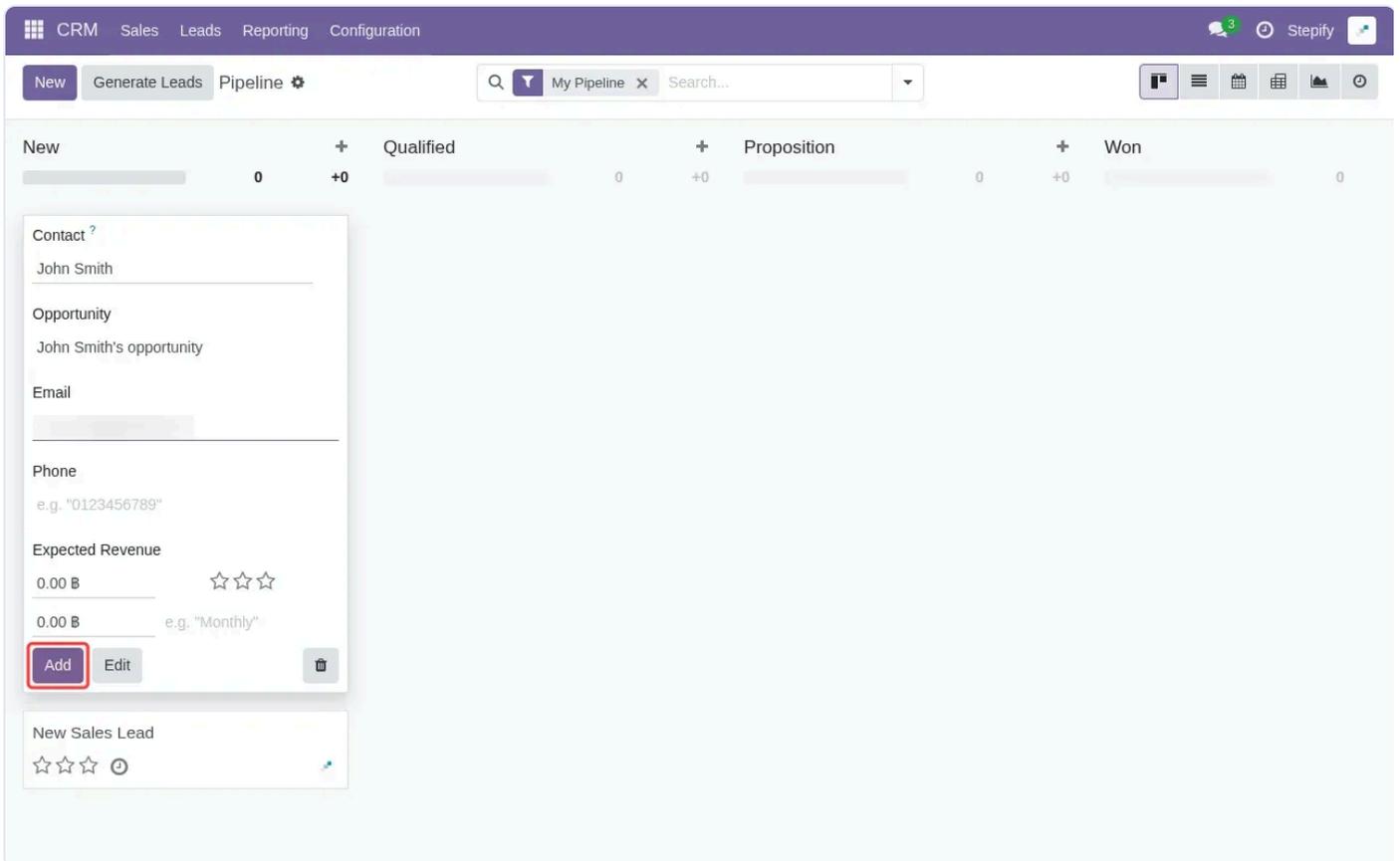
The screenshot shows the CRM Pipeline interface with the 'Contact ?' dropdown menu open. The dropdown menu is filled with search results for 'John Smith'. The first result, 'John Smith', is highlighted with a red box. Below it are several other 'John Smith' entries, followed by 'Create "John Smith"', 'Search More...', and 'Create and edit...'. At the bottom of the dropdown are 'Add', 'Edit', and 'Delete' buttons. Below the dropdown is a 'New Sales Lead' section with a star rating and a refresh icon.

## 6 Type email address in the Email field.



The screenshot shows the CRM Pipeline interface. At the top, there are navigation tabs: CRM, Sales, Leads, Reporting, and Configuration. On the right, there is a notification icon with '3' and the 'Stepify' logo. Below the navigation, there are buttons for 'New', 'Generate Leads', and 'Pipeline' with a gear icon. A search bar contains 'My Pipeline' and a search icon. The main area displays a pipeline with stages: New (0), Qualified (0), Proposition (0), and Won (0). A form is open on the left side, showing fields for Contact (John Smith), Opportunity (John Smith's opportunity), Email (e.g. "email@address.com"), Phone (e.g. "0123456789"), and Expected Revenue (0.00 B). The 'Add' button is highlighted with a red box. Below the form, there is a 'New Sales Lead' section with three stars and a refresh icon.

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



The screenshot shows the CRM Pipeline interface, similar to the previous one. The 'Add' button in the form is highlighted with a red box. The pipeline stages and form fields are the same as in the previous screenshot. The 'Add' button is located at the bottom left of the form, next to the 'Edit' button and a trash icon.

