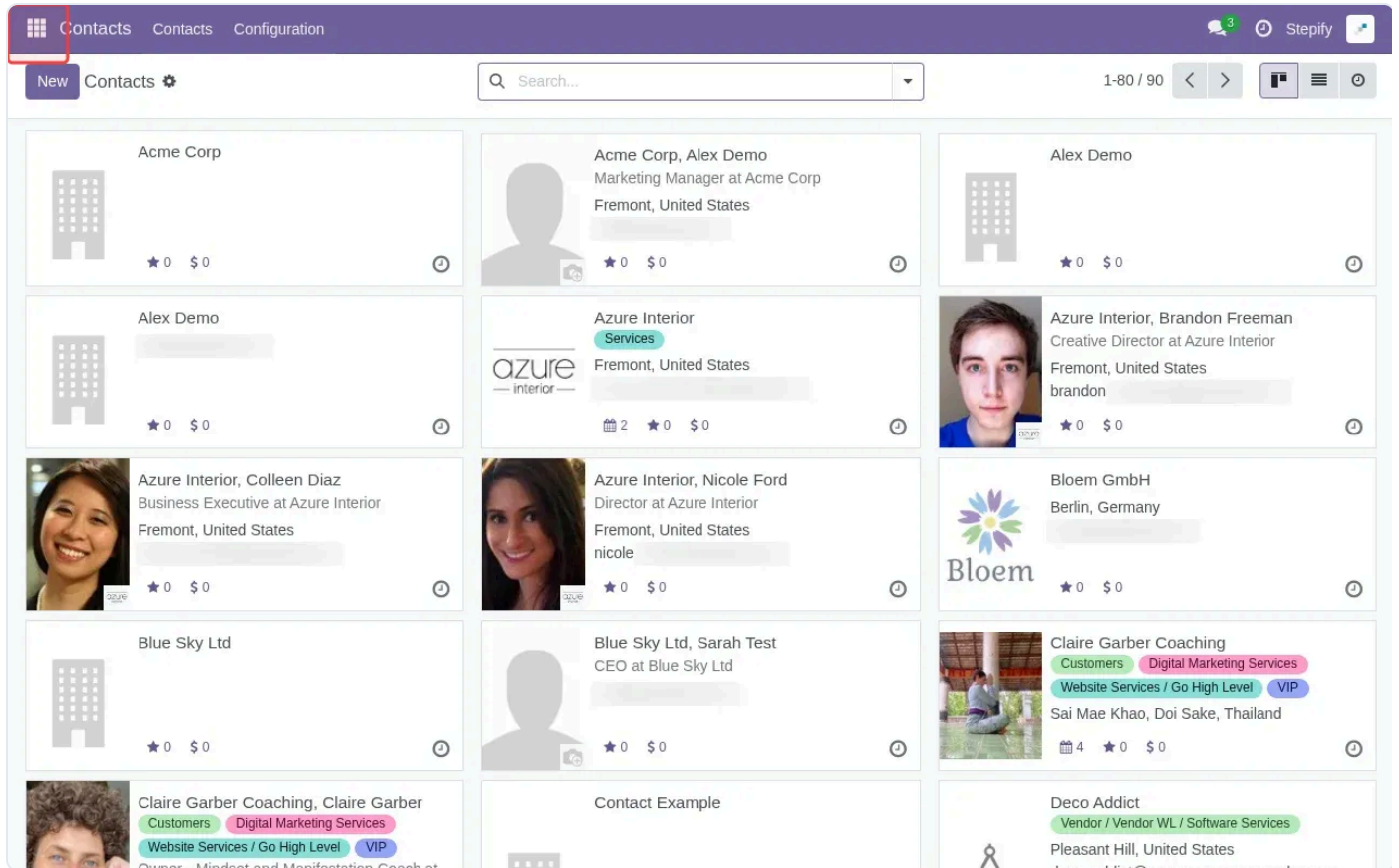


How to add a lead to the pipeline in Odoo

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. On the left, a sidebar menu lists various modules: Helpdesk, Discuss, Calendar, To-do, API APP, Contacts, CRM (highlighted with a red box), Sales, Dashboards, Payroll, Accounting, Project, Timesheets, Website, Email Marketing, Events, Employees, Attendances, Recruitment, and Time Off. 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 module interface with the 'New' button highlighted by a red box. The top navigation bar includes 'CRM', 'Sales', 'Leads', 'Reporting', and 'Configuration'. Below the navigation bar, there is a 'New' button, a 'Generate Leads' button, and a 'Pipeline' button. A search bar is also present. The main area displays a table with columns for 'New', 'Qualified', 'Proposition', and 'Won'. Each column has a '+' icon and a '0' value. A dropdown menu is open under the 'New' column, showing 'New Sales Lead' with three yellow stars and a clock icon. Below the dropdown, a tooltip indicates 'Priority: Very High'.

4 Type contact name in the Contact field.

The screenshot shows the CRM Pipeline view with the following components:

- Header:** CRM | Sales | Leads | Reporting | Configuration. User: Stepify.
- Navigation:** New | Generate Leads | Pipeline (selected). Search: My Pipeline.
- Pipeline Stages:** New (0), Qualified (+0), Proposition (0), Won (+0).
- Form Fields:**
 - Contact ?**: A dropdown menu is open, showing a search bar and a list of suggestions. The first suggestion, "John Smith", is highlighted with a red border.
 - Opportunity**: e.g. Product Pricing
 - Email**: e.g. "email@address.com"
 - Phone**: e.g. "0123456789"
 - Expected Revenue**: 0.00 B, with a star rating (☆☆☆) and a frequency selector (e.g. "Monthly").
 - Buttons**: Add, Edit, and a trash icon.
- Footer:** New Sales Lead (☆☆☆🕒).

5 Select 'John Smith' from the dropdown options.

The screenshot shows the CRM Pipeline view with the following components:

- Header:** CRM | Sales | Leads | Reporting | Configuration. User: Stepify.
- Navigation:** New | Generate Leads | Pipeline (selected). Search: My Pipeline.
- Pipeline Stages:** New (0), Qualified (+0), Proposition (0), Won (+0).
- Form Fields:**
 - Contact ?**: A dropdown menu is open, showing a search bar and a list of suggestions. The first suggestion, "John Smith", is highlighted with a red border.
 - Opportunity**: e.g. Product Pricing
 - Email**: e.g. "email@address.com"
 - Phone**: e.g. "0123456789"
 - Expected Revenue**: 0.00 B, with a star rating (☆☆☆) and a frequency selector (e.g. "Monthly").
 - Buttons**: Add, Edit, and a trash icon.
- Footer:** New Sales Lead (☆☆☆🕒).

6 Type email address in the Email field.

The screenshot shows the CRM Pipeline interface. The top navigation bar includes CRM, Sales, Leads, Reporting, and Configuration. The main header has tabs for New, Generate Leads, and Pipeline. A search bar is present with the text 'My Pipeline'. The Pipeline view shows stages: New, Qualified, Proposition, and Won, each with a count of 0. A form for adding a new lead is open on the left. The form fields are: Contact (John Smith), Opportunity (John Smith's opportunity), Email (e.g. "email@address.com"), Phone (e.g. "0123456789"), Expected Revenue (0.00 B), and a frequency dropdown (e.g. "Monthly"). The 'Add' button is highlighted with a red box. Below the form is a 'New Sales Lead' section with three stars and a clock icon.

CRM Sales Leads Reporting Configuration

New Generate Leads Pipeline

Search My Pipeline

New Qualified Proposition Won

0 +0 0 +0 0 +0 0

Contact ?
John Smith

Opportunity
John Smith's opportunity

Email
e.g. "email@address.com"

Phone
e.g. "0123456789"

Expected Revenue
0.00 B ☆☆☆
0.00 B e.g. "Monthly"

Add Edit

New Sales Lead
☆☆☆ ⌚

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

This screenshot is identical to the previous one, showing the CRM Pipeline interface with the 'New' stage form. The 'Add' button is highlighted with a red box, indicating the next step in the process.

CRM Sales Leads Reporting Configuration

New Generate Leads Pipeline

Search My Pipeline

New Qualified Proposition Won

0 +0 0 +0 0 +0 0

Contact ?
John Smith

Opportunity
John Smith's opportunity

Email
e.g. "email@address.com"

Phone
e.g. "0123456789"

Expected Revenue
0.00 B ☆☆☆
0.00 B e.g. "Monthly"

Add Edit

New Sales Lead
☆☆☆ ⌚

