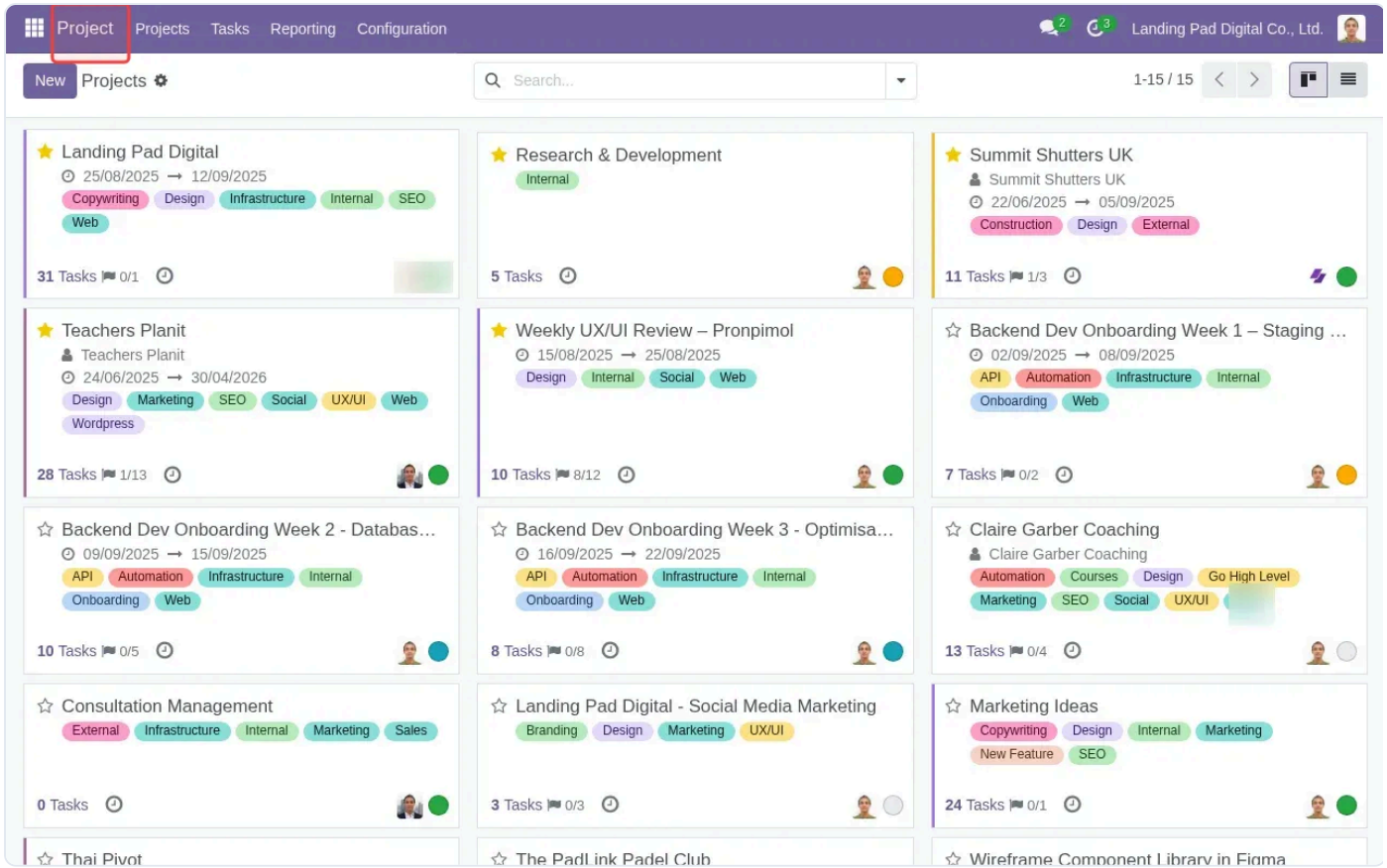


# How to add a new lead in Odoo CRM

Odoo CRM 4 steps · 59s

## 1 Click 'Project' in navbar to explore navigation options.



## 2 Click 'Tasks' to explore navigation options for CRM.

The screenshot shows a CRM dashboard with a top navigation bar containing 'Project', 'Projects', 'Tasks', 'Reporting', and 'Configuration'. The 'Tasks' menu item is highlighted with a red box. Below the navigation bar, there is a search bar and a grid of project cards. Each card displays project details such as name, dates, categories, and task counts. The grid contains 15 project cards, including 'Landing Pad Digital', 'Research & Development', 'Summit Shutters UK', 'Teachers Planit', 'Weekly UX/UI Review – Pronpimol', 'Backend Dev Onboarding Week 1 – Staging ...', 'Backend Dev Onboarding Week 2 - Databas...', 'Backend Dev Onboarding Week 3 - Optimisa...', 'Claire Garber Coaching', 'Consultation Management', 'Landing Pad Digital - Social Media Marketing', 'Marketing Ideas', 'Thai Pivot', 'The Padl ink Padel Club', and 'Wireframe Component Librarv in Figma'.

## 3 Click app switcher grid icon to access CRM.

This screenshot is identical to the one above, but the 'Tasks' menu item in the top navigation bar is expanded to show a dropdown menu with two options: 'My Tasks' and 'All Tasks'. The rest of the dashboard content remains the same.

# 4 Click Home Menu grid icon to open app switcher.

The screenshot shows a project management application interface. At the top, a navigation bar contains the following tabs: Project, Projects, Tasks, Reporting, and Configuration. On the right side of the navigation bar, there are notification icons (a speech bubble with '2' and a refresh icon with '3'), the company name 'Landing Pad Digital Co., Ltd.', and a user profile picture. Below the navigation bar is a search bar with the placeholder text 'Search...'. A sidebar menu is open on the left, listing various application features: Helpdesk, Discuss, Calendar, To-do, API APP, Contacts, CRM, Sales, Dashboards, Payroll, Accounting, Project (highlighted), Timesheets, Website, Email Marketing, Events, Employees, Attendances, Recruitment, and Time Off. The main area of the dashboard is a grid of project cards. Each card displays the project name, a star icon, a date range, a list of tags (e.g., Internal, Design, SEO, Social, UX/UI, Web, API, Automation, Infrastructure, Marketing, Sales, Branding, Copywriting, New Feature), the number of tasks, and a progress indicator. The projects shown include: 'Research & Development' (5 tasks), 'Summit Shutters UK' (11 tasks), 'Weekly UX/UI Review – Pronpimol' (10 tasks), 'Backend Dev Onboarding Week 1 – Staging ...' (7 tasks), 'Onboarding Week 2 - Databas...' (8 tasks), 'Backend Dev Onboarding Week 3 - Optimisa...' (8 tasks), 'Claire Garber Coaching' (13 tasks), 'Consultation Management' (0 tasks), 'Landing Pad Digital - Social Media Marketing' (3 tasks), 'Marketing Ideas' (24 tasks), 'Thai Pivot', 'The Padl ink Padel Club', and 'Wireframe Component Library in Figma'.