

How to add a new lead in Odoo CRM

Odoo CRM 4 steps · 59s

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

The screenshot displays the Odoo CRM interface. The top navigation bar (navbar) is purple and contains the following items: a grid icon, 'Project' (highlighted with a red box), 'Projects', 'Tasks', 'Reporting', and 'Configuration'. On the right side of the navbar, there are notification icons (a speech bubble with '2' and a bell with '3'), the company name 'Landing Pad Digital Co., Ltd.', and a user profile icon. Below the navbar, the 'New Projects' button is visible on the left, and a search bar is in the center. The main content area shows a grid of project cards. Each card includes a star icon, the project name, a date range, a list of tags (e.g., Copywriting, Design, Infrastructure, Internal, SEO, Web), the number of tasks, and a progress indicator. The projects listed are: Landing Pad Digital, Research & Development, Summit Shuttters 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 PadLink Padel Club, and Wireframe Component Library in Figma.

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

The screenshot shows the CRM interface with the 'Tasks' tab selected in the top navigation bar. The interface displays a grid of project cards, each with a star icon, project name, dates, tags, and task counts.

- Landing Pad Digital**: 25/08/2025 → 12/09/2025. Tags: Copywriting, Design, Infrastructure, Internal, SEO, Web. 31 Tasks, 0/1.
- Teachers Planit**: 24/06/2025 → 30/04/2026. Tags: Design, Marketing, SEO, Social, UX/UI, Web, Wordpress. 28 Tasks, 1/13.
- Backend Dev Onboarding Week 2 - Databas...**: 09/09/2025 → 15/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 10 Tasks, 0/5.
- Consultation Management**: 0 Tasks.
- Research & Development**: Internal. 5 Tasks.
- Weekly UX/UI Review – Pronpimol**: 15/08/2025 → 25/08/2025. Tags: Design, Internal, Social, Web. 10 Tasks, 8/12.
- Backend Dev Onboarding Week 3 - Optimisa...**: 16/09/2025 → 22/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 8 Tasks, 0/8.
- Landing Pad Digital - Social Media Marketing**: Branding, Design, Marketing, UX/UI. 3 Tasks, 0/3.
- Summit Shutters UK**: 22/06/2025 → 05/09/2025. Tags: Construction, Design, External. 11 Tasks, 1/3.
- Backend Dev Onboarding Week 1 – Staging ...**: 02/09/2025 → 08/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 7 Tasks, 0/2.
- Claire Garber Coaching**: 13 Tasks, 0/4. Tags: Automation, Courses, Design, Go High Level, Marketing, SEO, Social, UX/UI, Web.
- Marketing Ideas**: 24 Tasks, 0/1. Tags: Copywriting, Design, Internal, Marketing, New Feature, SEO.
- Thai Pivot**
- The Padl ink Padel Club**
- Wireframe Component Library in Figma**

3 Click app switcher grid icon to access CRM.

The screenshot shows the CRM interface with the 'Tasks' tab selected in the top navigation bar. The interface displays a grid of project cards, each with a star icon, project name, dates, tags, and task counts.

- Landing Pad Digital**: 25/08/2025 → 12/09/2025. Tags: Copywriting, Design, Infrastructure, Internal, SEO, Web. 31 Tasks, 0/1.
- Teachers Planit**: 24/06/2025 → 30/04/2026. Tags: Design, Marketing, SEO, Social, UX/UI, Web, Wordpress. 28 Tasks, 1/13.
- Backend Dev Onboarding Week 2 - Databas...**: 09/09/2025 → 15/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 10 Tasks, 0/5.
- Consultation Management**: 0 Tasks.
- Research & Development**: Internal. 5 Tasks.
- Weekly UX/UI Review – Pronpimol**: 15/08/2025 → 25/08/2025. Tags: Design, Internal, Social, Web. 10 Tasks, 8/12.
- Backend Dev Onboarding Week 3 - Optimisa...**: 16/09/2025 → 22/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 8 Tasks, 0/8.
- Landing Pad Digital - Social Media Marketing**: Branding, Design, Marketing, UX/UI. 3 Tasks, 0/3.
- Summit Shutters UK**: 22/06/2025 → 05/09/2025. Tags: Construction, Design, External. 11 Tasks, 1/3.
- Backend Dev Onboarding Week 1 – Staging ...**: 02/09/2025 → 08/09/2025. Tags: API, Automation, Infrastructure, Internal, Onboarding, Web. 7 Tasks, 0/2.
- Claire Garber Coaching**: 13 Tasks, 0/4. Tags: Automation, Courses, Design, Go High Level, Marketing, SEO, Social, UX/UI, Web.
- Marketing Ideas**: 24 Tasks, 0/1. Tags: Copywriting, Design, Internal, Marketing, New Feature, SEO.
- Thai Pivot**
- The Padl ink Padel Club**
- Wireframe Component Library in Figma**

4 Click Home Menu grid icon to open app switcher.

The screenshot displays a project management application interface. At the top, a purple navigation bar contains a grid icon (highlighted with a red box and the number 4), followed by tabs for 'Project', 'Projects', 'Tasks', 'Reporting', and 'Configuration'. On the right of the bar are notification icons (2 and 3), the company name 'Landing Pad Digital Co., Ltd.', and a user profile picture. Below the navigation bar is a search bar labeled 'Search...'. A left sidebar menu lists various application modules: 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 workspace is a grid of project cards. Each card includes a star icon, a title, a date range, a list of tags (e.g., 'Internal', 'Design', 'SEO'), a task count, a progress indicator, and a user profile picture. The cards are arranged in a 3x3 grid, with the bottom-right cell containing a 'Wireframe Component Library in Figma' card.

Project Management Application Interface:

- Navigation Bar:** Project, Projects, Tasks, Reporting, Configuration. User: Landing Pad Digital Co., Ltd.
- Search Bar:** Search...
- Left Sidebar (Menu):** Helpdesk, Discuss, Calendar, To-do, API APP, Contacts, CRM, Sales, Dashboards, Payroll, Accounting, Project (Selected), Timesheets, Website, Email Marketing, Events, Employees, Attendances, Recruitment, Time Off.
- Project Grid:**
 - Research & Development:** Internal, 5 Tasks.
 - Summit Shutters UK:** Construction, Design, External, 11 Tasks.
 - Weekly UX/UI Review – Pronpimol:** Design, Internal, Social, Web, 10 Tasks.
 - Backend Dev Onboarding Week 1 – Staging ...:** API, Automation, Infrastructure, Internal, Onboarding, Web, 7 Tasks.
 - Backend Dev Onboarding Week 2 - Databas...:** Infrastructure, Internal, 8 Tasks.
 - Backend Dev Onboarding Week 3 - Optimisa...:** API, Automation, Infrastructure, Internal, Onboarding, Web, 8 Tasks.
 - Claire Garber Coaching:** Automation, Courses, Design, Go High Level, Marketing, SEO, Social, UX/UI, 13 Tasks.
 - Consultation Management:** External, Infrastructure, Internal, Marketing, Sales, 0 Tasks.
 - Landing Pad Digital - Social Media Marketing:** Branding, Design, Marketing, UX/UI, 3 Tasks.
 - Marketing Ideas:** Copywriting, Design, Internal, Marketing, New Feature, SEO, 24 Tasks.
 - Thai Pivot:**
 - The Padl ink Padel Club:**
 - Wireframe Component Library in Figma:**