CRM Navigation (Odoo v19)

Audience: OEH Staff
Purpose: Provide a standardized understanding of how to navigate and use the CRM interface.
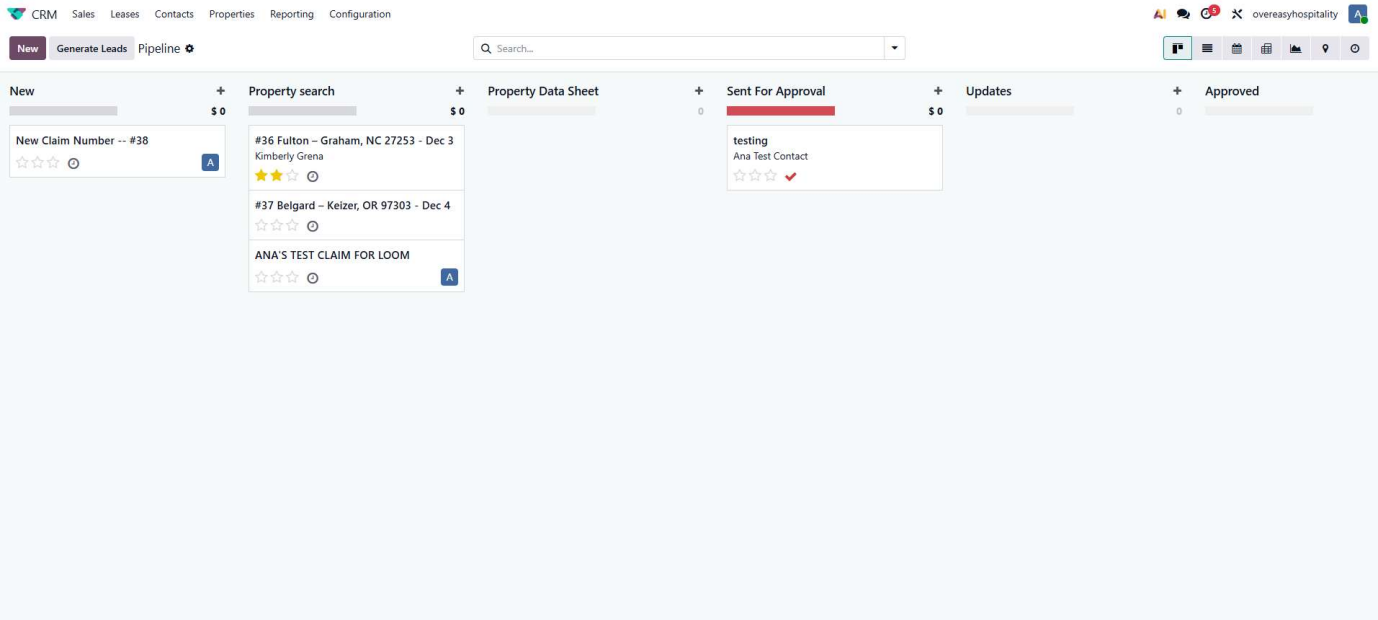**Last Updated:** December 2025

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1. CRM Views Overview

Odoo CRM provides four primary views. Each displays information differently and is used for different purposes.

1.1 Kanban View (Columns)

- Default landing view.
- Columns represent stages in the claim lifecycle.
- Each card represents an individual claim.
- Used for overall workflow visibility and high-level status tracking.

CRM   Sales   Leases   Contacts   Properties   Reporting   Configuration   overeasyhospitality

New   Generate Leads   Pipeline ⚙   Search...

New	+	Property search	+	Property Data Sheet	+	Sent For Approval	+	Updates	+	Approved
$ 0		$ 0		0		$ 0		$ 0		0

New
New Claim Number -- #38
☆☆☆ ⊙   A

Property search
#36 Fulton – Graham, NC 27253 - Dec 3
Kimberly Grena
★★☆☆ ⊙

#37 Belgard – Keizer, OR 97303 - Dec 4
☆☆☆ ⊙

ANA'S TEST CLAIM FOR LOOM
☆☆☆ ⊙   A

Sent For Approval
testing
Ana Test Contact
☆☆☆ ✔

1.2 List View

- Displays claims in table format.
- Useful for sorting, filtering, and performing bulk actions.
- Ideal for reporting, audits, or reviewing multiple records quickly.

CRM   Sales   Leases   Contacts   Properties   Reporting   Configuration   overeasyhospitality

New   Generate Leads   Pipeline ⚙   Search...   1-37 / 37 < >

Opportunity	Contact Name	Email	Salesperson	Expected Reve...	Stage			
#25 Camargo – Marietta, GA 30064 (F) Nov 14 TWO PROPERTIES	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed		✉ Email	💬 SMS
#8 Prospect, KY Lison (Corey) Oct 15 - Need funds	Michael Lopez	Michael.lopez@alesolutions.com	C Corey Roehl	$ 0.00	Moved In / Extensions		✉ Email	💬 SMS
#2 Carnes - Florence, SC 29505 (Ana) Friday move in	Kelli Mcwilliams	Kelli.Mcwilliams@alesolutions.com	C Corey Roehl	$ 0.00	Moved In / Extensions		✉ Email	💬 SMS
#1 Horwitz-Las Vegas, NV 89134 (Ana) Oct 23 Thursday!!! need to check in Friday	Lindsay Loza	Lindsay.Loza@alesolutions.com	C Corey Roehl	$ 0.00	Moved In / Extensions		✉ Email	💬 SMS
#36 Fulton – Graham, NC 27253 - Dec 3	Kimberly Grena	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Property search		✉ Email	💬 SMS
#29 Ho/Cong-Le – Peoria, AZ 85381 (F) 10/20	Katie Plaza	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed	📅 Reschedule	✉ Email	💬 SMS
#34 Marinette WI (F) Nov 26	Victoria Schmit	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed		✉ Email	💬 SMS
#28 Sewell – Covington, LA 70435 (F) Nov 18 - to far	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed		✉ Email	💬 SMS
#26 Woody – Washington, DC 20017 (F) Nov 18	Corey Roehl	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed		✉ Email	💬 SMS
#37 Belgard – Keizer, OR 97303 - Dec 4	Corey Roehl	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Property search		✉ Email	💬 SMS
testing	Ana Test Contact	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Sent For Approval	📅 Reschedule	✉ Email	💬 SMS
# 35 Loftis Family- Sherman, TX--- Dec 2 TuesdayProp 2 needs Showing	Evan Ehrhardt	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Lease Executed	📅 Reschedule	✉ Email	💬 SMS
#33 Johnson/Lopez – Jersey City, NJ 07304 (F) Nov 26	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	$ 0.00	Closed		✉ Email	💬 SMS
ANA'S TEST CLAIM FOR LOOM	Ana Cortes	"Ana Monserrat" <anam@overeasyhospitality.net>	A Ana Cortes	$ 0.00	Property search		✉ Email	💬 SMS
#32 Sterling – Owings Mills, MD 21117 (F) Nov 24	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Closed	📅 Reschedule	✉ Email	💬 SMS
#31 Kansas City KS (F) Nov 24	Victoria Schmit	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		$ 0.00	Closed		✉ Email	💬 SMS

1.3 Form View (Record View)

- Opens when selecting a claim card.
- Used to edit claim details, update fields, complete VA steps, and review all related information.
- Primary workspace for record updates.

CRM   Sales   Leases   Contacts   Properties   Reporting   Configuration   overeasyhospitality

New   Generate Leads   Pipeline ⚙   Search...

New	+	Property search	+	Property Data Sheet	+	Sent For Approval	+	Updates	+	Approved
$ 0		$ 0		0		$ 0		$ 0		0

CRM   Sales   Leases   Contacts   Properties   Reporting   Configuration

AI   💬   ⑤   ✕   overeasyhospitality   A

New   Pipeline
ANA'S TEST CLAIM FOR LOOM ⚙

📅 No Meeting   📋 Quotations 0   📝 Rentals 0   ⭐ Similar Leads 15

🔖   4 / 6   ‹ ›

New Quotation   New Rental   Won   Lost

New 3h   Property search 2d   Property Data Sheet 1m   Sent For Approval 15m   Updates 51m   …

Send message   Log note   Activity   🔍 📎² 👤¹

ANA'S TEST CLAIM FOR LOOM

Expected Revenue		**Probability**	
$ 0.00		at 100.00 %	

Case Number	0	Tags	
Agent Referral ?		Salesperson	Ana Cortes
Guest Name ?	Test Name	Property 1	Test Property 1
Guest Phone Number ?	7144560091	Property 2	
Guest Email ?	test@test.com	Property 3	
Location	California DR Residence	Funds Received by OEH	
City & State		Move In Reminder	☐
Zip	98740	1st Night Check 1 ?	☐
Move In Date ?		1st Night Check 2 ?	☐
Move Out Date ?		Logged in Spreadsheet	☐
Tenant Form ?	☐	Filed Invoice	☐
Background Check ?	☐	Sent to Bookkeeper	☐
ID Received	☐		
Draft Lease ?	☐		
Lease 1 ?	☐		

Dec 3, 2025

A ana.cortes112011@gmail.com ✉ Dec 3, 12:30 PM
Subject: Re: ANA'S TEST CLAIM FOR LOOM
Testing the reply
…

A Ana Cortes ✉ Dec 3, 12:30 PM
This is a test please reply

Dec 2, 2025

A Ana Cortes Dec 2, 4:18 PM
Stage changed
New → **Property search** *(Stage)*

A Ana Cortes Dec 2, 4:18 PM
Stage changed
Property search → **New** *(Stage)*

A Ana Cortes Dec 2, 4:08 PM
Stage changed
New → **Property search** *(Stage)*

A Ana Cortes Dec 2, 4:05 PM
Stage changed
Funds Out → **New** *(Stage)*

A Ana Cortes Dec 2, 10:46 AM
✔ To-Do done : Funds Out — Owner Confirmation

Original note:
Follow up with property owner to confirm funds were received and next steps are ready.

Dec 1, 2025

C Corey Roehl Dec 1, 1:40 PM

1.4 Activity View

- Centralized list of scheduled activities and reminders.
- Displays items generated by SLA timers or team scheduling.
- Allows staff to complete or reschedule follow-up tasks.

Pipeline ⚙   🔍 Search…   ▾   1-5 / 5   ‹ ›   ⊞ ≡ 📅 ▦ 📊 📍 ⊙

|	To-Do 🟥🟨🟩 8 /8	Email	Call	Meeting	Document	Signature	⇄
F #29 Ho/Cong-Le – Peoria, AZ 85381… $ 0.00 Corey Roehl Closed	Sent For Approval → 24h status check 12/04/2025 A						
👤 # 35 Loftis Family- Sherman, TX--- … $ 0.00 Corey Roehl Lease Executed	Lease Prep Reminder — Check Walkt… 12/04/2025 A ③						
👤 #32 Sterling – Owings Mills, MD 211… $ 0.00 Corey Roehl Closed	Sent For Approval → 24h status check 12/04/2025 A						
👤 testing $ 0.00 Corey Roehl Sent For Approval	Sent For Approval → 24h status chec… 12/04/2025 A ②						
F #20 Parker - Bryan TX 77807 (Ana) … $ 0.00 Kimberly Grena Closed	Lease Completion Checkpoint 12/04/2025 A						

➕ Schedule activity

2. Searching and Filtering Claims

The CRM toolbar contains three essential tools for locating records:

2.1 Search Bar

Search by:

- Agent Referral (Relocation Specialist)
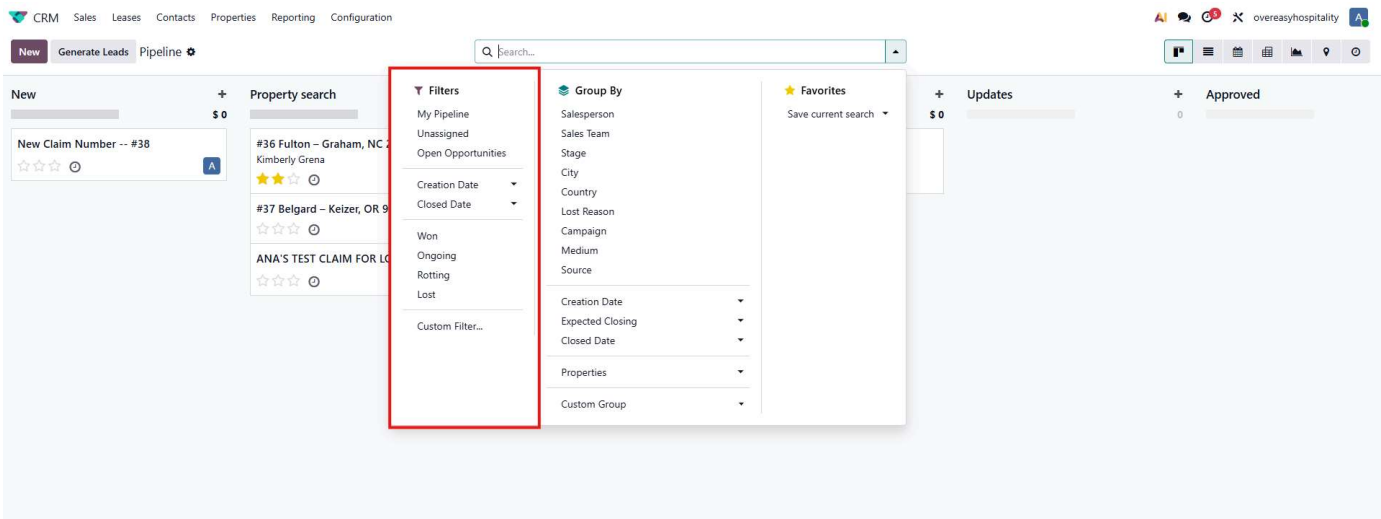- Claim number
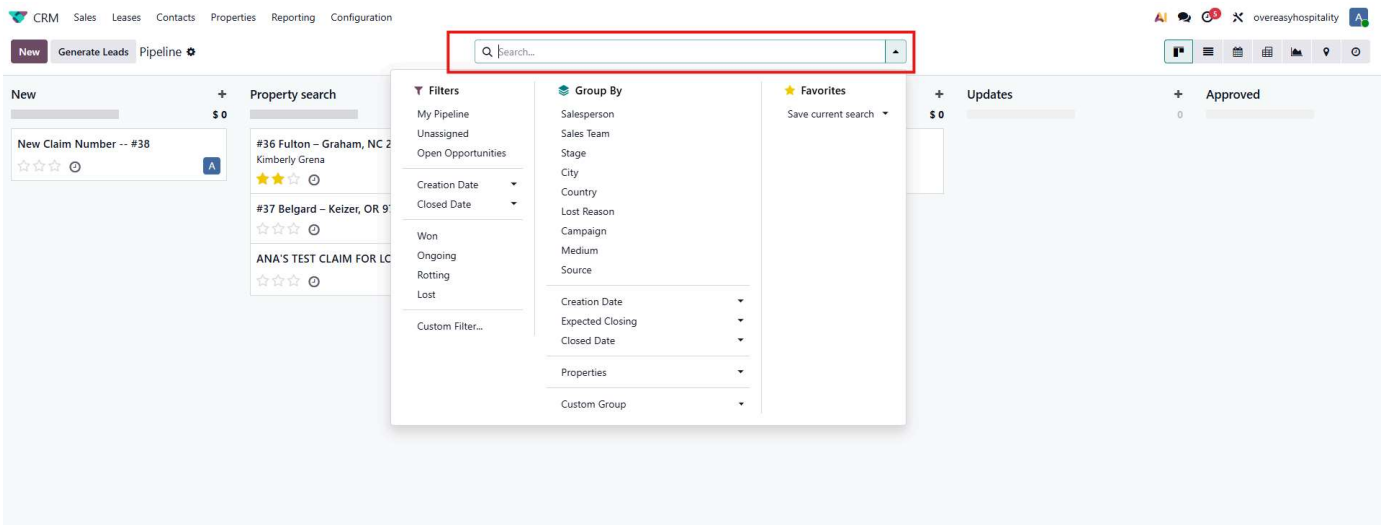
2.2 Filters

Common filters include:

- My Pipeline
- Unassigned
- Open Opportunities
- Creation Date
- Closed Date
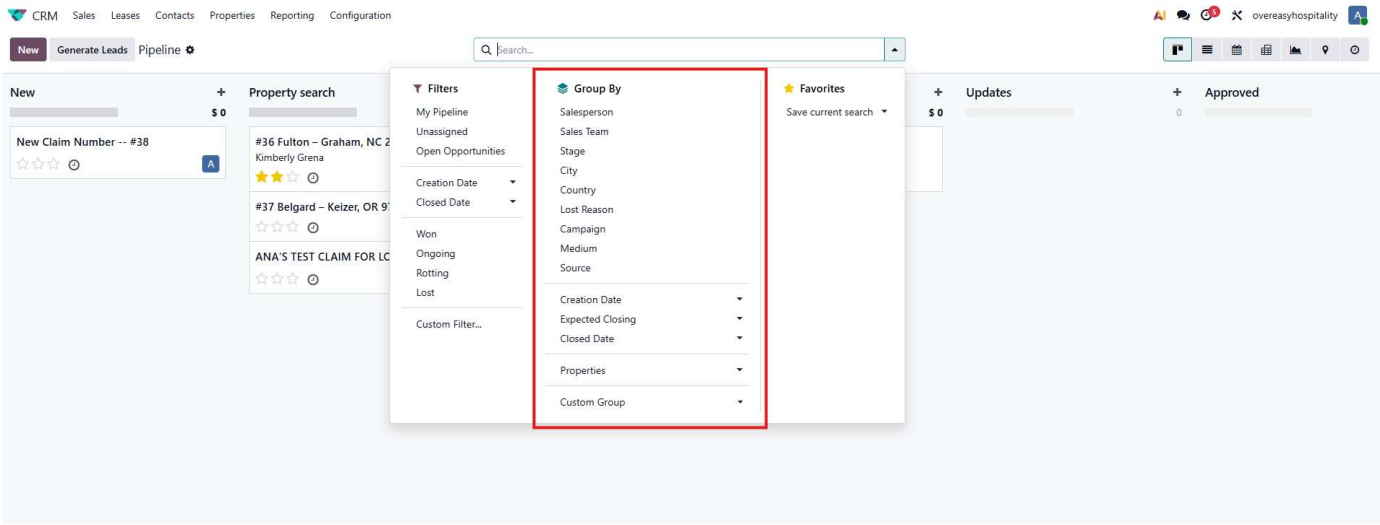
Custom filters may also be created as needed.

2.3 Group By

Allows grouping records visually, such as:
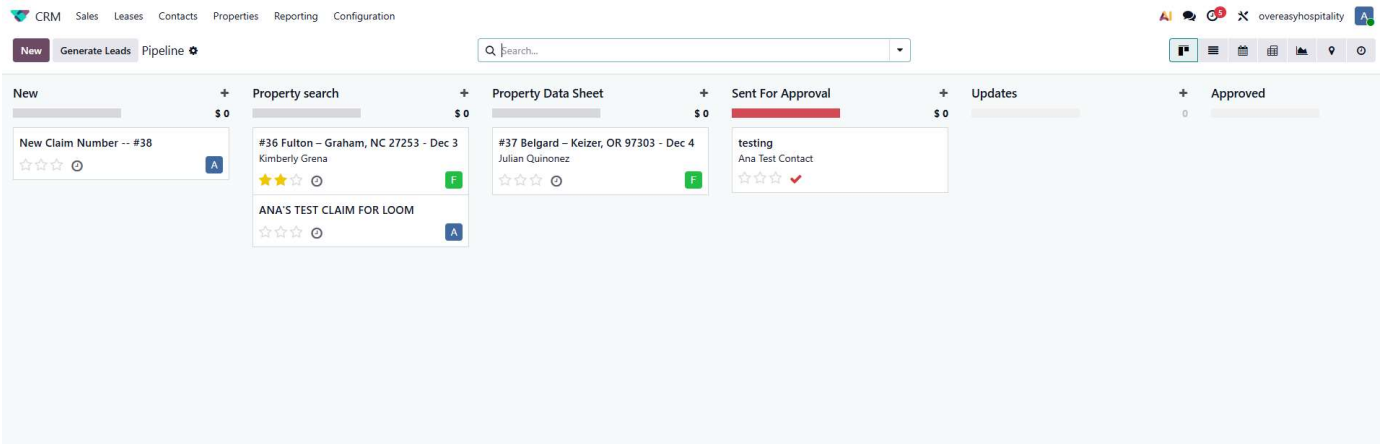
- Salesperson
- Sales Team
- Stage
- City

Useful for internal organization and reporting.

3. Opening, Editing, and Saving Records

3.1 Opening a Record

- Click a claim card in Kanban view **or**
- Click a row in List view.

3.2 Editing a Record

- Update required fields or VA steps.
  (Highlighted information is for VA use only)

3.3 Saving

- Click **Save** when changes are complete.

- Leaving the page without saving may result in data loss.

4. Understanding the Claim Layout

Inside each claim, users will see:

4.1 Header

Contains primary fields such as:

- Claim Number and Title
- Agent Referral (Relocation Specialist)
- Guest Name, Address and Contact information
- Property 1, 2 and three
- Sales Person

CRM   Sales   Leases   Contacts   Properties   Reporting   Configuration

New   Pipeline
       ANA'S TEST CLAIM FOR LOOM ⚙

No Meeting   Quotations 0   Rentals 0   Similar Leads 15

New Quotation   New Rental   Won   Lost

New 3h   Property search 2d   Property Data Sheet 1m   Sent For Approval 15m   Updates 51m   ...

ANA'S TEST CLAIM FOR LOOM

Expected Revenue	Probability
$ 0.00	at 100.00 %

Case Number	0		Tags	
Agent Referral ?			Salesperson	Ana Cortes
Guest Name ?	Test Name		Property 1	Test Property 1
Guest Phone Number ?	7144560091		Property 2	Winston Salem 27105
Guest Email ?	test@test.com		Property 3	
Location	DR Address		Funds Received by OEH	Dec 5
City & State	State and city		Move In Reminder	☐
Zip	98740		1st Night Check 1 ?	☐
Move In Date ?			1st Night Check 2 ?	☐
Move Out Date ?			Logged in Spreadsheet	☐
Tenant Form ?	☐		Filed Invoice	☐
Background Check ?	☐		Sent to Bookkeeper	☐
ID Received	☐			
Draft Lease ?	☐			
Lease 1 ?	☐			
Sent Next Instructions ?	☐			
Lease 2 ?	☐			

4.2 Tabs

Tabs include:

- **Notes**
  - **To put quick notes in. Free field**

Background Check ? ☐   Sent to Bookkeeper ☐

ID Received ☐

Draft Lease ? ☐

Lease 1 ? ☐

Sent Next ☐
Instructions ?

Lease 2 ? ☐

W9 Received ☐

Funds Sent To Owner   Nov 25

Funds Received by   Nov 25
Owner

Move In Instructions ☐
Sent 1

Move In Instructions ☐
Sent 2

| Notes | Contacts | VA Check Boxes | Leases |

- **Contacts**
  - **Relocation Specialist information. DO NOT TOUCH**

W9 Received ☐

Funds Sent To Owner   Nov 25

Funds Received by   Nov 25
Owner

Move In Instructions ☐
Sent 1

Move In Instructions ☐
Sent 2

| Notes | Contacts | VA Check Boxes | Leases |

COMPANY INFORMATION   **CONTACT INFORMATION**

Company Name ?   Contact Name   Ana Cortes

Address   Street...   Job Position

               Street 2...   Website ?   e.g. https://www.odoo.com

               City   State   ZIP

               Country

MARKETING   **OWNERSHIP**

Campaign ?   Sales Team   Claims VA Pipeline

Medium ?

Source ?

Referred By

- **VA Check Boxes**
  - **Steps for the pipeline and claim process as in this tab. VA USE ONLY.**

Sent Next Instructions [?]	☐			
Lease 2 [?]	☐			
W9 Received	☐			
Funds Sent To Owner	Nov 25			
Funds Received by Owner	Nov 25			
Move In Instructions Sent 1	☐			
Move In Instructions Sent 2	☐			

Notes	Contacts	VA Check Boxes	Leases

Property Sheet Uploaded [?]	☑	Contacted Property Owner	☐
Property Approved	☑	Received Move Out Instructions	☐
Walk Through	Nov 26	Received Security Deposit Policy	☐
Property Accepted	☑	Contacted Policyholder	☐
		Sent Banking Details	☐
		Property Damage	
		Security Deposit Received OEH	

- **Leases**
  - Additional Information on the Lease

Lease 2 [?]	☐	
W9 Received	☐	
Funds Sent To Owner	Nov 25	
Funds Received by Owner	Nov 25	
Move In Instructions Sent 1	☐	
Move In Instructions Sent 2	☐	

Notes	Contacts	VA Check Boxes	Leases

ACH Received	☐	Move-in INS number 1	
		Move-in INS number 2	
		Connect	☐

4.3 Chatter Panel

Used for all communication associated with the claim:

- **Message:** External communication (tenant, relocation specialist, landlord, etc.)
- **Log Note:** Internal communication for OEH staff
- **Schedule Activity:** Create reminders or follow-ups

Dec 3, 2025

A ana.cortes112011@gmail.com ☐ Dec 3, 12:30 PM

Subject: Re: ANA'S TEST CLAIM FOR LOOM
Testing the reply

...

A **Ana Cortes** ☐ Dec 3, 12:30 PM

This is a test please reply

──────────── Dec 2, 2025 ────────────

A **Ana Cortes** Dec 2, 4:18 PM
Stage changed
New → **Property search** *(Stage)*

A **Ana Cortes** Dec 2, 4:18 PM
Stage changed
Property search → **New** *(Stage)*

A **Ana Cortes** Dec 2, 4:06 PM
Stage changed
New → **Property search** *(Stage)*

A **Ana Cortes** Dec 2, 4:05 PM
Stage changed
Funds Out → **New** *(Stage)*

A **Ana Cortes** Dec 2, 10:46 AM
✔ To-Do done : Funds Out — Owner Confirmation

Original note:
Follow up with property owner to confirm funds were received and next steps are ready.

──────────── Dec 1, 2025 ────────────

C **Corey Roehl** Dec 1, 1:40 PM
Admasu Lalisho → **Ana Cortes** *(Contact Name)*

A **Ana Cortes** Dec 1, 12:01 PM
✔ To-Do done : Funds Out — Owner Confirmation

5. Moving Claims Between Stages

All stages transition through automation:

- Users may manually move a claim **only when necessary** and **only when all required information is complete.**
- Claims can be moved by dragging the card from one stage to another in Kanban view **or** by selecting the next stage inside the claim form.

> **Important:** Incorrect stage movement may disrupt workflows or create incomplete claim records. Only move a claim manually when the process has been fully completed.

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6. Breadcrumb Navigation

The breadcrumb trail appears at the top of the screen and shows your current location in the system.

Example: **New → Property Search → Property Data Sheet → Sent For Approval**

You may click any part of the breadcrumb to return to a previous view.

7. Best Practices

- Always confirm you are editing the correct record before making updates.
- Use the Search and Filter tools before asking for assistance locating a claim.
- Save frequently to avoid lost changes.
- Review internal notes and previous chatter before performing updates.
- Maintain accurate and consistent data entry at all times.

8. Common Issues and Solutions

Issue	Likely Cause	Resolution
Changes not saving	Edit mode not activated	Click **Edit**, make changes, then **Save**
Claim appears missing	Filter applied	Clear filters or use search bar
Unable to move claim	Required data incomplete	Complete all fields/steps first
CRM interface not loading	Browser cache	Refresh or try another browser

8. Common Issues and Solutions

Issue	Likely Cause	Resolution