**1. Configure CRM Settings:**

a. **Set up Stages:** - Access CRM settings through the Odoo dashboard. - Navigate to the "Stages" configuration. - Create custom stages that align with your sales process. - Assign probabilities to each stage to indicate the likelihood of closing a deal.

b. **Customize CRM Tags:** - Navigate to the "Tags" configuration. - Create tags for different attributes like industry, product interest, or source. - Assign colors and names to tags for easy identification.

c. **Default Salesperson:** - Access general CRM settings. - Set a default salesperson who will be assigned to new leads and opportunities by default.

d. **Lost Reasons:** - Go to the "Lost Reasons" configuration. - Create various reasons for losing opportunities. - Each reason should have a clear description.

**2. Create a New Lead:**

a. **Lead Form:** - From the CRM dashboard, click on "Create" or "New Lead." - Fill out the lead form with comprehensive details: - Company Name: XYZ Corporation - Contact Name: John Doe - Email: [john.doe@example.com](mailto:john.doe@example.com) - Phone: +1 123-456-7890 - Description: "Interested in IT consulting services, planning to expand operations." - Save the lead.

b. **Assign Salesperson:** - In the lead's details, assign it to a salesperson, e.g., "John Smith."

**3. Convert Lead to Opportunity:**

a. **Conversion:** - Open the lead you created earlier. - Click on a "Convert to Opportunity" button or similar action. - Confirm the conversion.

b. **Expected Closing Date and Revenue:** - In the opportunity form, set an "Expected Closing Date" for future reference. - Estimate the revenue for this opportunity, e.g., $50,000.

c. **Assign Opportunity:** - Assign the opportunity to a salesperson, e.g., "Jane Johnson."

**4. Record Interactions:**

a. **Adding Notes:** - In the opportunity, go to the "Notes" tab. - Add a detailed note regarding your conversation with the client, including date and time.

b. **Email Log:** - Access the email integration feature in Odoo. - Log an email correspondence with the client within the opportunity's email log, providing details of the email sent/received.

**5. Schedule Activities:**

a. **Task Creation:** - Go to the "Activities" tab in the opportunity. - Create a task with a due date for a follow-up, e.g., "Follow up with the client in one week."

b. **Meeting Scheduling:** - Create a meeting in the "Activities" tab with the client for a future date. - Specify the meeting location and agenda.

**6. Pipeline Management:**

a. **CRM Dashboard:** - Access the CRM dashboard. - Observe the sales pipeline, displaying opportunities in various stages.

b. **Filtering and Analysis:** - Use the dashboard's filtering options to segment opportunities by stage, salesperson, source, or any other criteria. - Analyze the data to identify trends and potential bottlenecks.

**7. Mark Opportunity as Won:**

a. **Closing the Deal:** - When the deal is successfully closed, return to the opportunity. - Change its stage to "Won" or a similar stage indicating success.

b. **Revenue Update:** - If the final deal amount differs from the estimated revenue, update it accordingly in the opportunity.