

01

CRM Overview

Odoo 19 Enterprise · CRM

The CRM module manages your sales pipeline — from the first contact with a prospect through to a won deal. It tracks every interaction, activity, and communication in one place.

1 What the CRM module does

CRM

The CRM module gives your sales team a structured way to manage prospects and customers. It tracks leads and opportunities through a visual pipeline, schedules follow-up activities, logs all communications, and provides reporting on sales performance. Every email sent or received from a prospect is automatically logged against their record.

2 Key concepts

A Lead is an unqualified enquiry — someone who has shown interest but has not yet been assessed. An Opportunity is a qualified lead with a realistic chance of conversion. A Pipeline is the visual view of all your opportunities grouped by stage. A Stage represents a step in your sales process — e.g. New, Qualified, Proposal, Won. Activities are scheduled actions — calls, emails, meetings — attached to an opportunity.

3 Leads vs Opportunities

Whether your company uses leads depends on your sales volume and process. If you receive many unqualified enquiries, enable leads — they act as a holding area before opportunities. If every enquiry is worth pursuing, skip leads and create opportunities directly. This setting is in CRM → Configuration → Settings.

Malaysian context — Most Malaysian SMEs skip leads and create opportunities directly. Use leads only if you receive high volumes of cold enquiries that need qualification before assigning to a salesperson.