Training guide
Odoo 19

CRM in Odoo 19

What a CRM is, how the sales pipeline works, and how it connects to quotations, orders, invoices, marketing and delivery, with a worked sale from first contact to payment.

1–3	Understand	what a CRM is, the building blocks
4–5	Set up	set-up, pipeline, activities
4–6	Connect	quotations, orders, marketing
7–11	Deploy	a sale from lead to payment, checks

Written for someone who has never worked with a CRM: it starts from the idea, then moves to the Odoo screens, with Iranian and international equivalents side by side.

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The short version

CRM stands for Customer Relationship Management. In Odoo it is the place where possible customers are recorded, followed through a pipeline of stages, and turned into quotations and sales orders. It answers one question every day: which deals are open, how likely are they to close, and what must happen next.

This guide is written for someone who has never used a CRM. It begins with what a CRM is and why a business needs one, explains the building blocks, sets up the module step by step, and then shows how it connects to Sales, Marketing, Website, Accounting, Projects and Helpdesk. It closes with strengths and weaknesses, real-world cases, a walkthrough of one sale from first contact to payment, reporting, and a go-live checklist. Two tags mark the difference between a company in Iran and one elsewhere: Iran and Outside Iran

#	Step	What you decide	Can it change later?
Set-up			
1	Enable features	Leads and opportunities, pipeline, team, lead sources, quotations	Yes
2	Sales teams	Who sells what, and which team owns which pipeline	Yes
3	Pipeline stages	The steps a deal passes through, and the probability at each	Yes. Deals keep their stage
4	Lost reasons and tags	Why a deal was lost; labels for filtering	Yes
5	Assignment rules	Who receives a new lead, and how it is shared	Yes
Work			
6	Lead sources	Website, email, phone, social media, events, partners	Yes
7	Activities and follow-up	Calls, meetings, emails and their reminders	Yes
8	Quotations and sales orders	The bridge from a won deal to money	Yes, until confirmed
Check			
9	Go-live tests	Proof that a lead can become a paid invoice	

The one idea that makes the rest predictable

Every possible sale is one card that moves left to right across a board. The card carries the customer, the expected value, the probability and the next action. If every card has an owner, a value and a next step, the board tells you what the next month of revenue will look like. If a card has none of those, it is only a hope.

What is in this guide

1 What a CRM is, and why a business needs one

2 The building blocks of the CRM app

3 Setting up the CRM

4 Working the pipeline: views and daily routine

5 Activities, communication and follow-up

6 Connections: Sales, Marketing, Website, Accounting, Projects, Helpdesk

7 Strengths and weaknesses

8 Real-world challenges and how Odoo solves them

9 Iran and the rest of the world on one page

10 One sale, from first contact to payment

11 Reporting and forecasting

12 Go-live checks and common mistakes

13 Cheat sheet, glossary and self-check

Scope: Odoo 19, Community and Enterprise. Features marked Enterprise need Enterprise, such as predictive lead scoring and some forecasting views. Menu labels can move between 19.x releases; where a path looks different on your screen, search the menu for the name of the screen. This guide follows on from the Project and Inventory guides and uses the two sister companies: Sahand Industrial in Tehran and Sahand Trading in Dubai. Client names are fictional.

About the company examples

Some examples are named after well-known companies, such as Salesforce, HubSpot, Amazon and Digikala, because the sales problem they are known for is easy to recognise. This guide does not say that those companies use Odoo. It shows how the same problem is handled with standard Odoo features.

1 What a CRM is, and why a business needs one

Before any screen: the idea. This section assumes you have never sold anything through a system.

A shop counter with a notebook

Imagine a salesperson in a small shop. A customer asks about a generator on Monday. The salesperson writes the name and the phone number in a notebook, then forgets to call back. On Thursday the customer buys from a competitor. Nobody knew the generator enquiry existed, and nobody can say how many enquiries like it went cold last month.

A CRM is that notebook made reliable. Every enquiry is recorded once, with who it came from, what they want and how much it might be worth. Each one has a stage, a next step and a date to do it. The whole team sees the same list, and the manager sees the total value of what is still open.

What a CRM does, in plain words

Records
Every enquiry, contact and company, in one place, so nothing is lost.

Tracks
Where each deal stands, from first contact to signature.

Reminds
The next call, meeting or email, with a date and an owner.

Measures
How many deals, how much value, how many are won, and why others were lost.

Forecasts
What revenue is likely next month, based on probability and stage.

Connects
A won deal becomes a quotation, a sales order and an invoice without retyping.

Five words you will meet

Word	Meaning	Example
Lead	A possible customer who has shown interest but is not yet qualified	A web form asking about generators
Opportunity	A qualified lead with a realistic chance of a sale, a value and a stage	50 kVA generator for a hotel, 800 million IRR
Pipeline	All opportunities, arranged by stage	Qualified, Proposition, Negotiation, Won
Probability	The chance the deal closes, set by stage or by hand	60% at proposition
Expected revenue	Value multiplied by probability	800 × 60% = 480 million IRR

In Odoo a lead and an opportunity are the same record. A lead becomes an opportunity when you move it into the pipeline. This is why the CRM app has one list and one board for both.

Who uses the CRM

Role	Does	In Odoo
Salesperson	Works leads, calls, sends quotations, moves deals forward	Sales team member; own opportunities; activities
Sales manager	Assigns leads, reviews the pipeline, coaches, forecasts	Team leader; team pipeline; reports
Marketing	Brings in leads through campaigns and forms; measures sources	Lead sources; UTM tracking; marketing reports
Customer service	Hands won customers to support or projects	Links to Helpdesk and Projects
Finance	Checks what was sold, invoiced and paid	Sales orders; invoices; payments

2 The building blocks of the CRM app

A handful of objects explain the whole app. Learn these names once and every screen becomes readable.

Object	What it is	Example	Technical name
Lead or opportunity	The main record: contact, company, value, probability, stage, owner	Hotel Atlas: 50 kVA generator	`crm.lead`
Stage	A column of the pipeline; sets the default probability	New, Qualified, Proposition, Won	`crm.stage`
Sales team	A group of salespeople who share a pipeline and targets	Tehran Retail, Dubai Export	`crm.team`
Lead source	Where the lead came from; used for marketing reports	Website form, Referral, Trade fair	`utm.source`
Lost reason	Why a deal was closed without a sale	Price too high, chose competitor	`crm.lost.reason`
Tag	A free label for filtering	Hotel, Urgent, Export	`crm.tag`
Activity	A planned action with a date and an owner: call, meeting, email, to-do	Call Mr Karimi on Tuesday	`mail.activity`
Contact and company	The people and organisations the deals are with	Mr Karimi, Hotel Atlas Ltd	`res.partner`
Quotation and sales order	The priced offer and the confirmed order that follow a deal	SO/2026/0412	`sale.order`
Assignment rule	Automatic distribution of new leads to salespeople or teams	Round robin across Tehran Retail	crm.team.member
Chatter	The history of messages, notes and stage changes on a record	Note: customer asked for discount	mail.message

Lead, opportunity, deal: one record, three names

Before the pipeline, the record is a lead: a possible customer with little information. Once you assign it a stage in the pipeline it is an opportunity. When a quotation is confirmed and the stage is Won, it is a won deal. The same record moves through all three; you do not copy anything.

Pipeline stages, with probability

Stage	Default probability	Meaning	What must be true to enter
New	10%	Just arrived; nobody has spoken to the customer	A lead exists

Stage	Default probability	Meaning	What must be true to enter
Qualified	25%	The need, budget and timing have been checked	A need and a contact are confirmed
Proposition	60%	A quotation has been sent	A quotation or proposal exists
Won	100%	The customer has accepted	A confirmed sales order exists
Lost	0%	The deal is closed without a sale	A lost reason is chosen

These percentages are a starting point. Change them to match your own history: if three out of ten proposals close, the proposition stage should be near 30%, not 60%. A forecast built on wrong probabilities is only as good as those numbers.

Teams and salespeople

A sales team owns a pipeline and its targets. A salesperson can belong to several teams. The team leader sees every opportunity of the team; a salesperson sees their own and, depending on the settings, the team's. Teams are how you keep Tehran Retail and Dubai Export apart in the same database.

3 Setting up the CRM

The set-up in dependency order. Each step uses the one before it.

Step 1 Enable the features

CRM › Configuration › Settings

Setting	What it switches on	Turn it on when
Leads	Capture of enquiries before they are qualified	Enquiries arrive faster than they are qualified
Opportunities	The pipeline and forecast	Almost always
Multi-team management	Several sales teams with their own pipelines	More than one team or market
Predictive lead scoring Enterprise	Odoo ranks leads by how likely they are to win	Enough history (hundreds of closed deals)
Lead mining Enterprise	Finds companies matching your criteria	You need outbound prospecting
Quotations and sales orders	The bridge to Sales	Always, for a sales company
Mail integration	Emails received and sent logged on the record	Salespeople work mainly by email
Calendar sync	Meetings in Google or Outlook calendars	Salespeople live in their calendar

Step 2 Sales teams

CRM › Configuration › Sales Teams · `crm.team`

Field	What it drives
Team name and leader	Who sees the pipeline and receives the team's reports
Members	Who can be assigned leads and opportunities
Email alias	An address such as sales.tehran@... that creates leads automatically
Target	The revenue goal used in dashboards and forecasts
Company	Keeps the team inside one legal entity

Step 3 Pipeline stages

CRM › Configuration › Stages · `crm.stage`

- **Keep four to six stages.** Each stage should describe something you can observe, such as a quotation sent, not a feeling.
- **Set the probability on each stage** from your own history (section 2).
- **Mark one stage as Won** and one group as Lost. Odoo uses them for reports and for closing deals.

- **Rename safely.** Stage names can change without losing deals; removing a used stage requires moving its deals first.

Step 4 Lost reasons, tags and sources

CRM › Configuration

Item	Use	Example
Lost reasons	Why deals are lost; the reason becomes a report	Price too high; no budget this year; chose competitor
Tags	Labels for filtering and reports; keep a short list	Hotel, Retail, Export, Urgent
Lead sources (UTM)	Where enquiries come from; marketing measures each one	Website, Instagram, Trade fair 1405, Referral

Step 5 Assignment rules Enterprise

CRM › Configuration › Assignment

Assignment rules send new leads automatically, by region, by value or in turn (round robin). Without a rule, leads wait in an unassigned list until someone takes them. A rule that gives every lead to the same person creates a bottleneck; spread the load.

Iran Iranian practice

- Enquiries arrive from Instagram, WhatsApp, Divar and referrals. Create a source for each, so marketing can compare them.
- Quotation values are in rials; prices quoted in toman must be converted before they enter the pipeline.
- Use the Persian name and the company registration in the contact record, as the invoice needs them.

Outside Iran Elsewhere

- Many markets use trial periods and demo requests as the first stage; add a stage for them.
- Multi-currency deals: the pipeline shows expected revenue in the company currency at the rate of the day.
- Territory rules by country or postcode are common in larger teams; use assignment rules to implement them.

4 Working the pipeline: views and daily routine

The same opportunities, read in different ways. Each view answers a different question.

View	Question it answers	Best for	Where
Pipeline (kanban)	Where is each deal, and how much is at each stage?	Daily work; moving deals forward	CRM › Pipeline
List	Which deals are largest, oldest or without activity?	Bulk changes, sorting, filtering	CRM › Pipeline › List
Activities	What must I do today, and what is overdue?	Daily planning	CRM › Activities
Calendar	What meetings and deadlines are this week?	Planning calls and visits	CRM › Calendar
Pivot and graph	How much did we win by team, source or month?	Management reporting	CRM › Reporting

Reading the pipeline board

Each column is a stage. Each card shows the customer, the expected revenue, the probability, the owner's picture and the next activity. The total at the top of a column is the value of deals in that stage. Drag a card to the next stage when the real world changes; the probability changes with it, and the move is logged in the chatter.

A daily routine for a salesperson

1. **Morning, ten minutes:** open Activities and do every overdue item first, then today's.
2. **New leads:** qualify each new lead: need, budget, timing. Move it to Qualified or mark it lost with a reason.
3. **Proposals:** send each quotation from its opportunity and move the deal to Proposition.
4. **Stalled deals:** any deal without activity for a week gets a call or a clear reason to wait.
5. **Evening, five minutes:** update probability and expected close date on every deal you touched.

Filters that do most of the work

- **My opportunities:** everything you own, across teams.
- **Overdue activities:** the morning list of what you forgot.
- **Expected this month:** deals with a close date in the current period.
- **Without next activity:** deals that nobody is moving; the most dangerous filter.

5 Activities, communication and follow-up

Most deals are lost by silence, not by competition. This section shows how Odoo keeps every promise visible.

Activities

An activity is a planned action with a type, a date and an owner. Types include a call, a meeting, an email, a to-do and a custom type such as site visit. When an activity is done, the next one is planned, so the deal always has a next step. A deal with no next activity is a deal drifting away.

Activity type	Typical use	Example
Call	First contact, follow-up	Call Mr Karimi to confirm the budget
Meeting	Discovery, demonstration, signing	Site visit to Hotel Atlas, Tuesday 10:00
Email	Sending a proposal or a summary	Send the revised quotation
To-do	Internal work	Check stock of the 50 kVA unit
Custom	Anything specific to your business	Technical survey

Communication on the record

Every email sent or received with a contact can be logged on the opportunity, so the history of the deal is in one place. Internal notes stay inside the company. Use notes for things the customer must not see, and messages for things sent to the customer. The chatter also records every stage change, probability change and amount change, which is the audit trail of the deal.

> **Follow-up that works**
> A good follow-up adds something: a price, a delivery date, a reference from a similar client. A reminder that only asks “any news?” does not move the deal. Put the reason for each planned contact in the activity note, so that whoever takes over the deal knows what was promised.

Lead scoring Enterprise

Predictive lead scoring ranks open leads by the likelihood they will be won, based on the history of your won and lost deals and on the lead’s data. It is a useful sort order for a large volume of leads. It only learns when there is enough history, so it is not a substitute for qualifying leads by hand in a small team.

6 Connections: Sales, Marketing, Website, Accounting, Projects, Helpdesk

A CRM is useful alone. Its real value comes when a won deal flows straight into sales, invoicing and delivery, and when marketing sees which campaigns produce revenue.

From enquiry to cash

Lead (web, email, phone) → Opportunity → Quotation → Sales order → Invoice and payment

Connected app	What flows	How to set it up
Sales	A quotation from the opportunity; confirmation marks the deal Won	Quotation button on the opportunity; pricelists per team
Website	Contact and quote forms create leads with the source set	Website form linked to the CRM team; UTM tracking
Marketing (Email, SMS)	Campaigns sent to leads and contacts; the results return to the opportunities	UTM campaign and source on each lead
Accounting	Invoices and payments of won deals; customer balance visible on the opportunity	Customer account on the contact; payment terms
Inventory	Stock availability and delivery dates on the quotation	Products with routes and lead times (see the Inventory guide)
Project	A service product sold creates a project for delivery	Service product with “Create a Project” set (see the Project guide)
Helpdesk Enterprise	After sale, customer problems create tickets linked to the customer	Helpdesk team; customer on the ticket
Subscriptions Enterprise	Recurring contracts created from a won deal	Recurring products on the quotation

A quotation from an opportunity: an example

Sahand Industrial quotes Hotel Atlas for one 50 kVA generator with installation. The opportunity already holds the contact and the value. The quotation takes the lines from the product list, applies the team’s pricelist and the discount approved by the manager.

Line	Quantity	Unit price (million IRR)	Amount (million IRR)
Generator 50 kVA	1	720	720
Installation service	1	40	40

Line	Quantity	Unit price (million IRR)	Amount (million IRR)
Discount 5% on the generator			−36
Total before VAT			**724**
VAT 10%			72.4
Quotation total			**796.4**

When the customer accepts, the quotation is confirmed. The opportunity moves to Won, the sales order is created, and the installation service can create a project for the crew. The expected revenue on the opportunity has now become actual revenue.

Marketing that pays for itself

When every lead carries its source and campaign, marketing can report the revenue each campaign produced, not only the number of clicks. The campaign that brought ten leads and one large contract may be worth more than one that brought a hundred small enquiries.

Iran **Practical points**

- A quotation may need the economic code and the national ID or registration number of the customer; keep them on the contact, not in the notes.
- Postdated cheques for large deals: agree the payment terms on the quotation so that the invoice and the cheque dates match.
- Sales from Divar and Instagram often arrive by phone; log the call on the lead the same day.

Outside Iran **Practical points**

- VAT on services and goods follows the place of supply; check the tax on each product before the quotation goes out.
- Export quotations need the customer's tax identifier and the currency agreed in the quotation.
- Pricelists by country or by team let one catalogue serve several markets.

7 Strengths and weaknesses

An honest assessment, so that a team knows where the CRM fits and where it needs help.

Strengths

Strength	Why it matters
One record from enquiry to cash	Lead, quotation, order, invoice and payment are linked; nothing is retyped
Simple pipeline	A board that a new salesperson understands in a morning
Activities planned on every deal	The next step is always visible; overdue work is listed
Good marketing link	Sources and campaigns travel with the lead; return on marketing can be measured
Teams and territories	Several pipelines in one database, with rules for who gets what
Forecast from the pipeline	Expected revenue comes from stages and probabilities, not from memory
Full history	Every change of stage, amount and owner is logged

Weaknesses

Weakness	What it means in practice	How teams cope
Garbage in, garbage out	Probabilities and values typed carelessly produce a useless forecast	Review the pipeline weekly with the manager; set stage rules
Depends on daily discipline	Deals not updated look healthy until they vanish	Daily routine (section 4); overdue reports
Predictive scoring is Enterprise	Community users sort leads by hand or by source	Qualify leads with a checklist
Not a marketing automation suite	Complex nurture journeys need the Marketing app or an external tool	Keep simple sequences in Marketing; integrate for heavy use
Reports need set-up	The default dashboard answers basic questions	Build a few pivot views and save them as favourites
Duplicates appear	The same company can be entered twice from different sources	Use duplicate detection and merge on a regular schedule
Mobile editing is slow	Long forms are harder on a phone	Use the mobile app for activities; the desktop for planning

A quick scorecard

Need	Fit	Comment
Small team selling a few products	Strong	Pipeline, quotations and activities are enough
Several sales teams and markets	Strong	Teams, pricelists and assignment rules
Large prospecting volume	Good	Predictive scoring Enterprise and lead mining help; set rules carefully
Complex enterprise sales with long cycles	Partial	Works with stages and documents; deep forecasting may need a specialised tool
Heavy marketing automation	Limited	Use the Marketing app or an integrated tool
Customer support after sale	Good	Helpdesk Enterprise and Projects link the work

8 Real-world challenges and how Odoo solves them

Eight situations, each with the problem, the set-up that answers it and what to watch for. Well-known companies illustrate the problem only; they are not claimed to use Odoo.

1 Enquiries that go cold: the notebook problem

Leads are answered late or forgotten. Fictional case: Sahand Industrial, a generator dealer.

Problem	Forty enquiries a week from the website and phone; a third are never called back.
Odoo set-up	Website form creates a lead with its source; assignment rule by region; activity planned on creation; an alert for leads without activity.
What happens	Every enquiry has an owner and a call planned within a day; the Without next activity filter is empty each morning.
Watch for	A rule that assigns leads to someone away on leave. Review the rules when people change roles.

2 Forecasts that never match: the Salesforce problem

Managers ask for a forecast and the answer changes every week. Fictional case: a software reseller in Dubai.

Problem	The forecast is the sum of what salespeople feel, and it is always too optimistic.
Odoo set-up	Stages with probabilities measured from the last twelve months; expected close date on every deal; a weekly review that only moves deals with evidence.
What happens	The forecast is the sum of expected revenue by stage. The gap between forecast and actual is reviewed each month and the probabilities are corrected.
Watch for	Probabilities set once and never checked. Measure win rate by stage every quarter.

3 Marketing that cannot prove its value: the HubSpot problem

Campaigns generate clicks; nobody knows which ones produce sales. Fictional case: a retail chain in Tehran.

Problem	Marketing reports leads; sales reports revenue; the two never agree.
Odoo set-up	UTM source and campaign on every lead; the Won revenue report grouped by campaign; a monthly joint review.
What happens	The campaign with the fewest leads turns out to bring the largest orders, and the budget moves to it.
Watch for	Leads entered by hand without a source. Make the source mandatory at creation.

4 Lost deals nobody understands: the price problem

A company keeps losing deals and does not know why. Fictional case: an electrical contractor.

Problem	The team says “we lost on price”, but nobody has counted it.

Odoo set-up	A mandatory lost reason; a report of lost value by reason, team and month; the reason noted in the chatter.
What happens	The report shows that 60% of losses are on delivery time, not on price. The team changes its lead times and the win rate rises.
Watch for	A lost reason of “other” used for most losses. Review it monthly and add the missing reasons.

5 A large account with many contacts: the enterprise problem

One customer has five decision makers and three departments. Fictional case: a hospital group.

Problem	Each department is quoted by a different salesperson; the group discount is never applied.
Odoo set-up	One company record with its contacts as children; one opportunity per department linked to the group; a pricelist for the group.
What happens	Every quotation for the group uses the same pricelist; the account view shows total value across departments.
Watch for	Contacts added as separate companies. The parent company is the one that holds the discount.

6 Quotation approvals: the discount problem

Salespeople give discounts that managers never see. Fictional case: a wholesale business in Dubai.

Problem	Discounts above 10% go out without approval and margins disappear.
Odoo set-up	Discount limits per group; quotations above the limit need a manager confirmation; discount shown on reports.
What happens	The salesperson sees a warning at 12% and sends the quotation for approval; the manager approves or counter-offers from the same screen.
Watch for	Approval rules that everybody is allowed to bypass. Limit who can change the limit.

7 Handover to delivery: the project problem

A sale is won, but delivery starts late because nobody told the project team. Fictional case: an installation firm.

Problem	The sales team closes the deal on Thursday; the crew hears on Monday, and the customer calls twice.
Odoo set-up	Service product that creates a project on confirmation; the project linked to the opportunity and the customer; the handover activity assigned to the project manager.
What happens	Confirmation creates the project at once; the crew sees the job, the customer and the quoted scope in one place.
Watch for	Scope changed in the quotation after the project was created. Changes must be made on the sales order and the project updated.

8 Repeat business: the subscription problem

Customers renew contracts and nobody remembers the renewal date. Fictional case: a maintenance company.

Problem	Three contracts expired last year without a renewal call; two customers left.
Odoo set-up	Recurring products on the quotation; the contract date recorded; an activity planned sixty days before renewal.
What happens	Each renewal becomes an opportunity automatically, with the renewal activity assigned to the account manager.
Watch for	Contracts that are not entered as recurring cannot be renewed automatically. Enter them as recurring from the start.

9 Iran and the rest of the world on one page

Selling is the same discipline everywhere. What changes is the channel, the payment method, the tax and the words people use.

Topic	Iran	UAE, our example	Elsewhere, for comparison
Lead channels	Instagram, WhatsApp, Divar, phone, referrals and trade fairs; much of the first contact is by phone	Website, LinkedIn, referrals, trade shows	Web forms, email, marketing automation, events
Payment	Postdated cheques and bank transfers; the payment terms matter as much as the price	Bank transfer; credit terms for trade	Card, direct debit, invoice terms
Currency	Rials; prices quoted in toman in the market; the pipeline stores rials	Dirham	Local currency; multi-currency pipelines
Tax on the quote	VAT 10%; economic code and national ID on the customer	VAT 5%; TRN on the customer	VAT or sales tax by country and by customer type
Calendar	Jalali year and months; follow-up plans often by Jalali week; Odoo stores Gregorian dates	Gregorian	Gregorian
Vocabulary	Lead سرنخ, opportunity فرصت فروش, quotation پیش‌فاکتور, sales order سفارش فروش, lost reason دلیل از دست رفتن	Lead, opportunity, quotation	Lead, opportunity, proposal

What standard Odoo does not do for Iran

Jalali dates on screens and prints, Persian quotation layouts, and a link to the taxpayers' e-invoicing system. Nothing in this guide changes: leads, stages, quotations and reports work the same way in every country.

Iran A sensible Iranian set-up

- One team per market (retail, projects, export) with its own pricelist.
- Sources created for each channel, including Instagram, WhatsApp and Divar.
- Payment terms with postdated cheque options written on the quotation.
- Monthly review of win rate in rials, with the toman equivalent shown in the meeting.

Outside Iran A sensible UAE set-up

- One team per emirate or per channel (direct, partners, export).
- Pricelists by team; discount limits by role.
- Renewal activities for contracts sixty days ahead.
- Monthly forecast review with the finance team.

10 One sale, from first contact to payment

A single deal followed through every step of the CRM and the apps behind it. Read it once to see how the pieces fit, then use it as a training script.

Mr Karimi, the owner of Hotel Atlas, fills in the contact form on the Sahand Industrial website asking for a 50 kVA generator with installation. The deal then moves through the steps below.

#	Step	Who	What Odoo records
1	The website form is sent	Website	A lead with source Website, the message and the contact
2	Assignment rule gives the lead to the Tehran Retail team	Automatic	The lead owner and team; a call activity planned for today
3	The salesperson calls and confirms the need, budget and timing	Salesperson	Note on the lead; the lead moves to Qualified (25%)
4	A site visit is booked for Tuesday	Salesperson	Meeting activity on the lead; calendar invitation
5	Site visit done; technical survey written	Salesperson	Activity marked done; survey attached to the lead
6	Value estimated at 800 million IRR; expected close in 30 days	Salesperson	Expected revenue set; close date set
7	Quotation created from the opportunity	Salesperson	Quotation with lines, pricelist and 5% discount
8	Discount above the team limit? No; quotation sent	Salesperson	Quotation emailed; the deal moves to Proposition (60%)
9	Customer asks for a cheaper installation; manager counter-offers	Manager	Quotation revised; the old version kept in the chatter
10	Customer accepts the revised quotation	Customer	Quotation confirmed; sales order created; deal moves to Won
11	Installation service creates a project for the crew	Automatic	Project created, linked to the order and the customer
12	Generator delivered from stock	Warehouse	Delivery validated; stock reduced; the delivery date on the order
13	Installation completed; timesheets recorded by the crew	Crew	Timesheets on the project; cost recorded
14	Invoice issued for the generator and the installation	Accounting	Invoice posted; VAT calculated; customer receivable created
15	Payment received by bank transfer	Accounting	Payment reconciled; invoice marked paid

#	Step	Who	What Odoo records
16	Follow-up activity: service check in six months	Salesperson	Activity planned; the account enters the after-sale cycle
17	Monthly review: deal counted as won, with its source and team	Sales manager	Won revenue in the report by source and team

> **The chain in one line**
>
> Website form, lead, assignment, activities, opportunity, quotation, sales order, delivery, project, invoice, payment, follow-up, report. Each arrow is a record that already holds the data of the step before, which is why the sale can be traced end to end.

Where the money appears

Moment	Expected revenue (CRM)	Actual revenue (Accounting)
Lead created	0	0
Qualified (25%)	200 (25% of 800)	0
Quotation sent (60%)	480 (60% of 800)	0
Quotation accepted (Won)	800	0
Invoice posted	800 leaves the pipeline	800 (+ VAT)
Payment received	Closed	Cash in the bank

Amounts in million IRR, without VAT. The pipeline total and the ledger total must come from the same deal, and the difference between them is the risk that the forecast carries.

11 Reporting and forecasting

A pipeline is only useful if it is measured. This section shows the reports that matter and how to read them.

Report	Shows	Question it answers
Pipeline by stage	Expected revenue per stage	How much is in play, and where?
Forecast Enterprise	Expected revenue by close month	What will we likely book next month?
Win rate	Won divided by closed, by team and source	Which sources and teams actually close?
Lost reasons	Lost value by reason	Why do we lose, and what can we change?
Activity report	Calls, meetings and emails per salesperson	Is the team working the pipeline?
Sales by source and campaign	Won revenue grouped by the lead source	Which marketing spend pays back?

Weighted and unweighted

Unweighted pipeline is the total value of open deals. Weighted pipeline multiplies each deal by its probability. Use the unweighted number to see the size of the opportunity and the weighted number to plan. Showing only the unweighted number makes a team look richer than it is.

A worked example

Sahand Industrial, Tehran Retail team, at the end of the month. Amounts in million IRR.

Stage	Deals	Value	Probability	Weighted value
Qualified	6	1,500	25%	375
Proposition	4	2,200	60%	1,320
Negotiation	2	900	80%	720
Open total	**12**	**4,600**		**2,415**
Won this month	3	1,100	100%	1,100
Lost this month	5	1,300	0%	0

Reading the table: the open pipeline is 4,600, but the realistic expectation is about 2,415 from it. The team has won 1,100 this month. The loss ratio is high: 1,300 lost against 1,100 won, which means the win rate on value is about 46%. The first question for the manager is why proposals close at 46% when the proposition stage assumes 60%.

Forecasts are calibrated, not guessed

After six months of data, compare the probability assigned to each stage with the share of deals that actually closed from it. If the proposition stage closes at 40%, set it to 40%. A forecast that is calibrated every quarter is the one managers trust.

12 Go-live checks and common mistakes

Run these in a copy of the configured database before the sales team starts working in it. Each test exercises one link in the chain.

Step 9 Twelve tests

#	Do this	Expect this
1	Create a lead from the website form with a source	The lead appears in the right team with the source filled in
2	Assign a lead by the rule; check the owner	The owner is the one the rule chose; a call activity exists
3	Move an opportunity through every stage	The probability changes at each stage; the chatter logs each move
4	Create a quotation from an opportunity	The quotation carries the contact, the team and the pricelist
5	Give a discount above the limit	Odoo asks for approval; the quotation cannot be confirmed by the salesperson
6	Confirm the quotation	The opportunity becomes Won; the sales order exists and links back to the deal
7	Mark a deal lost without a reason	Odoo refuses; with a reason, the deal is closed and appears in the lost report
8	Invoice and register the payment	The invoice and the payment appear on the opportunity; the customer balance is correct
9	Merge two duplicate companies	One company remains; both sets of contacts and deals are on it
10	Check the pipeline total and the weighted total	The totals equal the sum of the deals and their probabilities
11	Log out and check a salesperson who should not see another team	The other team's opportunities are not visible
12	Run the win-rate report by source for the month	The numbers match the won and lost deals counted by hand

Common mistakes

Mistake	What you see	Remedy
Probabilities never reviewed	Forecast far from actual each month	Calibrate quarterly from closed deals
Deals without a next activity	Stalled deals look alive	Daily filter; manager review

Mistake	What you see	Remedy
Lost deals without a reason	Nobody knows why sales are lost	Mandatory lost reason
Leads without a source	Marketing cannot measure anything	Mandatory source on creation
Discounts without limits	Margins fall without anyone deciding it	Limits per role; approvals
Duplicate companies	Two histories for one customer	Duplicate check; merge monthly
Too many stages	Salespeople stop updating the board	Four to six stages
Expected value never adjusted	Pipeline looks bigger than it is	Update value at each stage change
Won deals not linked to a sales order	Revenue reports disagree with Accounting	Win only through the quotation
Assignment rule gives all leads to one person	One salesperson overloaded, others idle	Round robin or territory rules

13 Cheat sheet, glossary and self-check

Where each setting is, what it is called in Persian, and eight questions to test yourself.

Where is it?

Step	Setting	Menu	Object or field
1	Features	CRM › Configuration › Settings	Leads, opportunities, teams
2	Sales teams	CRM › Configuration › Sales Teams	`crm.team`
3	Pipeline stages	CRM › Configuration › Stages	`crm.stage`
4	Lost reasons, tags	CRM › Configuration	`crm.lost.reason`, `crm.tag`
5	Assignment rules	CRM › Configuration › Assignment Enterprise	Automatic assignment
6	Leads and pipeline	CRM › Pipeline	`crm.lead`
6	Activities	CRM › Activities	`mail.activity`
7	Quotation from opportunity	Opportunity › New Quotation	`sale.order`
8	Reports	CRM › Reporting	Pivot and graph

Menu positions can differ slightly between 19.x releases. If a path does not match, use the search at the top of the screen with the name in the second column.

Persian, English, Odoo

Persian	In Odoo
سرنخ	Lead
فرصت فروش	Opportunity
مرحله فروش	Pipeline stage
تیم فروش	Sales team
احتمال موفقیت	Probability
فعالیت	Activity

Persian	In Odoo
پیش‌فاکتور	Quotation
سفارش فروش	Sales order
دلیل از دست رفتن	Lost reason
درآمد مورد انتظار	Expected revenue
نرخ برد	Win rate
منبع سرنخ	Lead source

Check yourself

	Question	Answer
1	What is the difference between a lead and an opportunity?	A lead is an unqualified possible customer; an opportunity is a qualified lead that sits in the pipeline with a value and a stage.
2	Why must every deal have a next activity?	So that the deal keeps moving and does not drift away unnoticed.
3	What does expected revenue equal?	The deal value multiplied by its probability.
4	When is a deal truly Won?	When the quotation is confirmed and a sales order exists.
5	Why record a lost reason?	So that the team can see the patterns in its losses and change what causes them.
6	Which source should a web form lead carry?	The website source, plus the campaign if the form came from one.
7	What is the weighted pipeline?	The sum of each open deal multiplied by its probability.
8	What should a manager do when the forecast is far from actual?	Recalibrate the stage probabilities from closed deals and review the assumptions.

The whole guide in two lines

A CRM keeps every possible sale on one board, with a value, a probability and a next step, and turns the won ones into quotations, orders and invoices. Keep the pipeline honest every day, and the forecast and the reports will tell the truth.