

# 02

## The Pipeline

Odoo 19 Enterprise · CRM

The pipeline is the heart of CRM – a visual Kanban board showing all your active opportunities grouped by stage. It gives your team an instant overview of where every deal stands.

### 1 Access the pipeline

CRM → Sales → My Pipeline

The pipeline opens in Kanban view by default, showing opportunity cards grouped in columns by stage. Each card shows the opportunity name, customer, expected revenue, and probability. Drag cards between columns to move them to a different stage. Switch to List view for a more detailed tabular view, or to Activity view to see scheduled activities across all opportunities.

### 2 Filter and search the pipeline

By default the pipeline shows your own opportunities (My Pipeline). Remove the My Pipeline filter to see all salespeople's opportunities. Use the search bar to filter by customer, salesperson, sales team, stage, or tag. Save frequently used filter combinations as Favourites for quick access.

**Team view** – Sales managers should remove the "My Pipeline" filter and group by Salesperson to get a full team overview. Save this as a favourite called "Team Pipeline".

### 3 Opportunity cards

Each opportunity card in the pipeline shows: the opportunity title, customer name, expected revenue, probability of winning, assigned salesperson, and any scheduled activities. The coloured dot on the activity icon indicates urgency: green = on time, orange = due today, red = overdue. Click any card to open the full opportunity record.

### 4 Stages and probability

Each stage has a default win probability that updates automatically as you move opportunities through the pipeline. Odoo also uses AI-based probability prediction – after enough historical data, it predicts win probability based on patterns from your past deals. The probability bar on each card reflects this prediction.

**Customize stages** – Stages are configured per sales team. Go to CRM → Configuration → Stages to add, rename, reorder, or remove stages. Each stage can have a default probability and can be marked as a Won or Folded stage.

