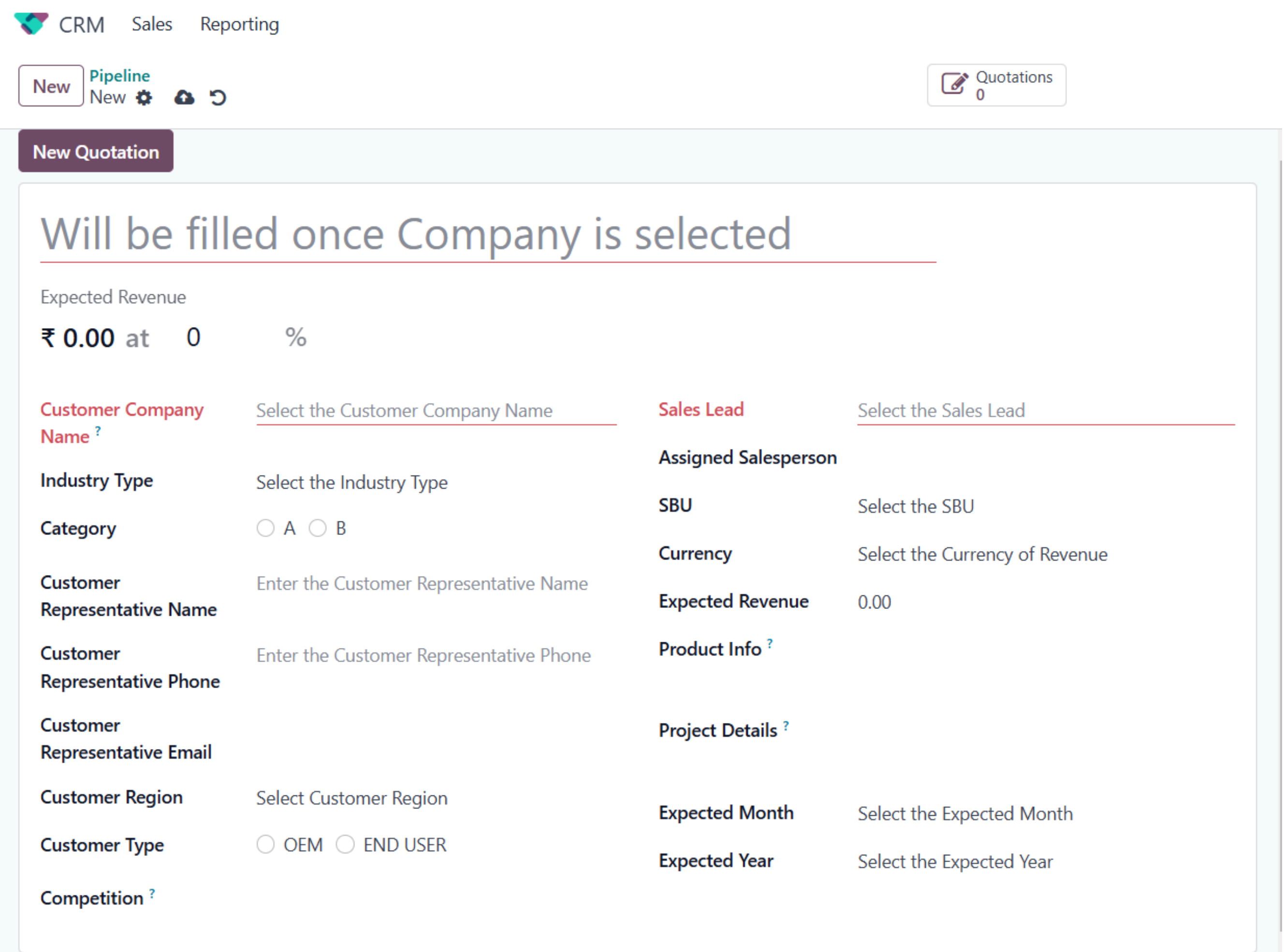
Creating New Records on CRM Module

1. Click on New Button on the list view.

After clicking on the new button, you will be redirected to the "Form View" where you can add all details related to your order. Let's explore them one by one.

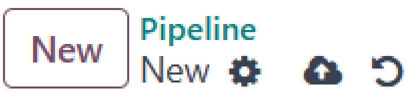


All the columns in an excel sheet are visible as "fields" in the form view. Fields marked in **"RED"** are mandatory and the record cannot be saved unless it's filled.

The Mandatory fields are:

1. Customer Company Name
2. Sales Lead
3. Title Field (will be automatically filled when you select Customer Company Name)

2. Going back / Settings / Save / Undo



a. To go back to the **list view**, you can click on the pipeline field.
b. If you click on the gear button, you can view extra options like printing or sharing the record with someone and other extra settings which may be useful.
c. The cloud button next to gear is the "**Save Manually**" option.
d. Next to the save button is the **Undo option** to revert back all actions to the last updated stages before saving the record.

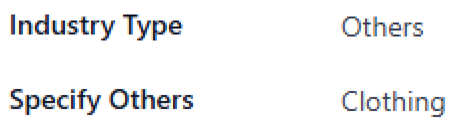
> Records are saved automatically even if you forgot to save manually. But it's always safer to save manually once before exiting a record.

3. Selecting Type of Customer

While selecting the type of customer, you have two options : OEM and End User. If you click OEM then a new field pops below it to fill the End User details as shown below in the image.

4. Selecting Type of Industry

In case the industry type isn't mentioned which is matching with the customer, you can select Others and manually enter the industry type in the field which appears under the industry type field as shown below.

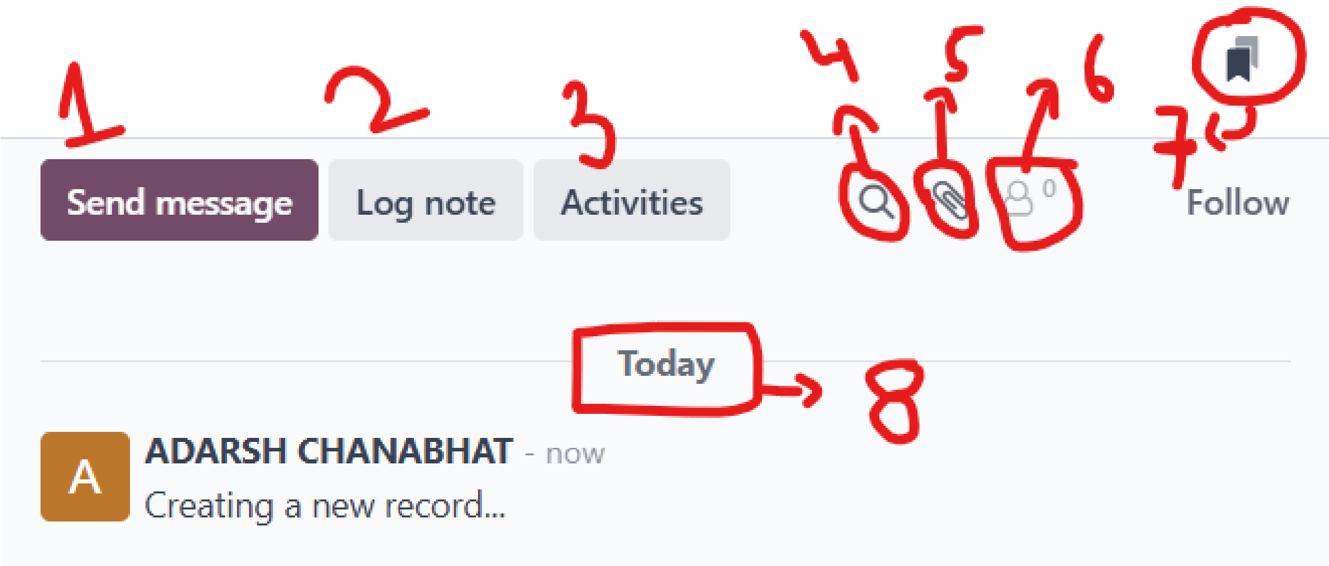


List of Industry types available in the drop down are :

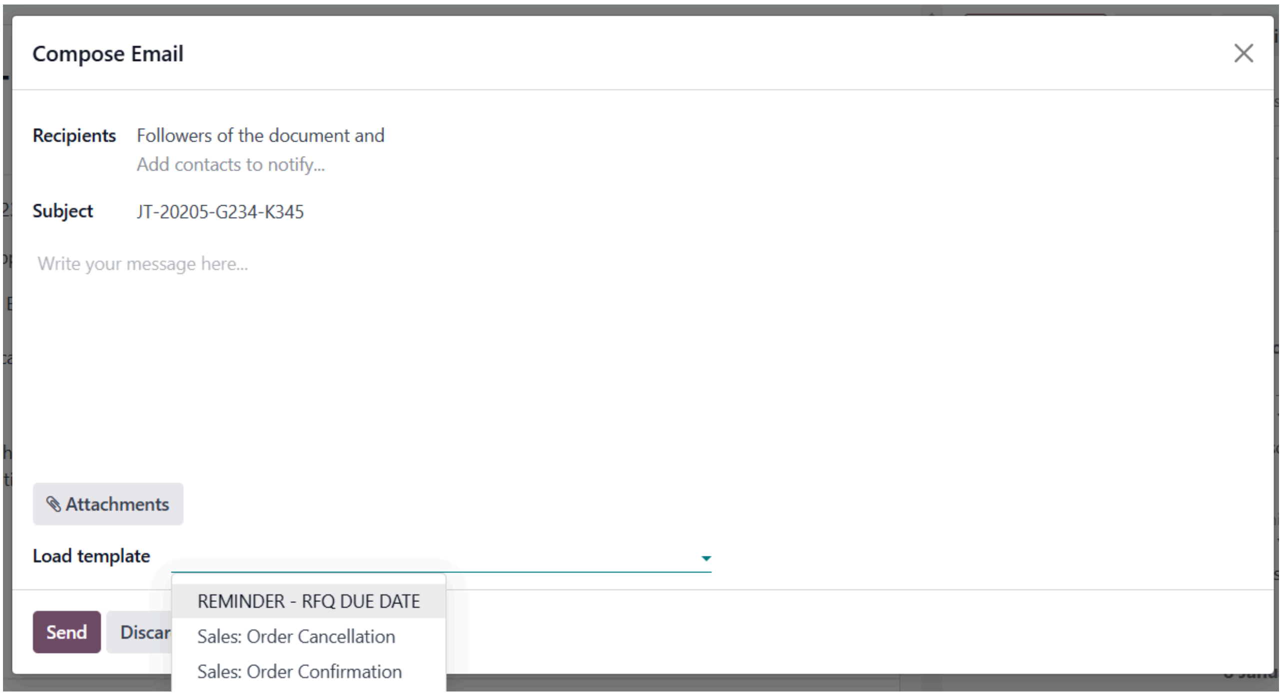
- Cement
- Chemical
- Fertilizer
- Oil & Gas
- Petrochemical
- Power
- Steel

5. Log Section

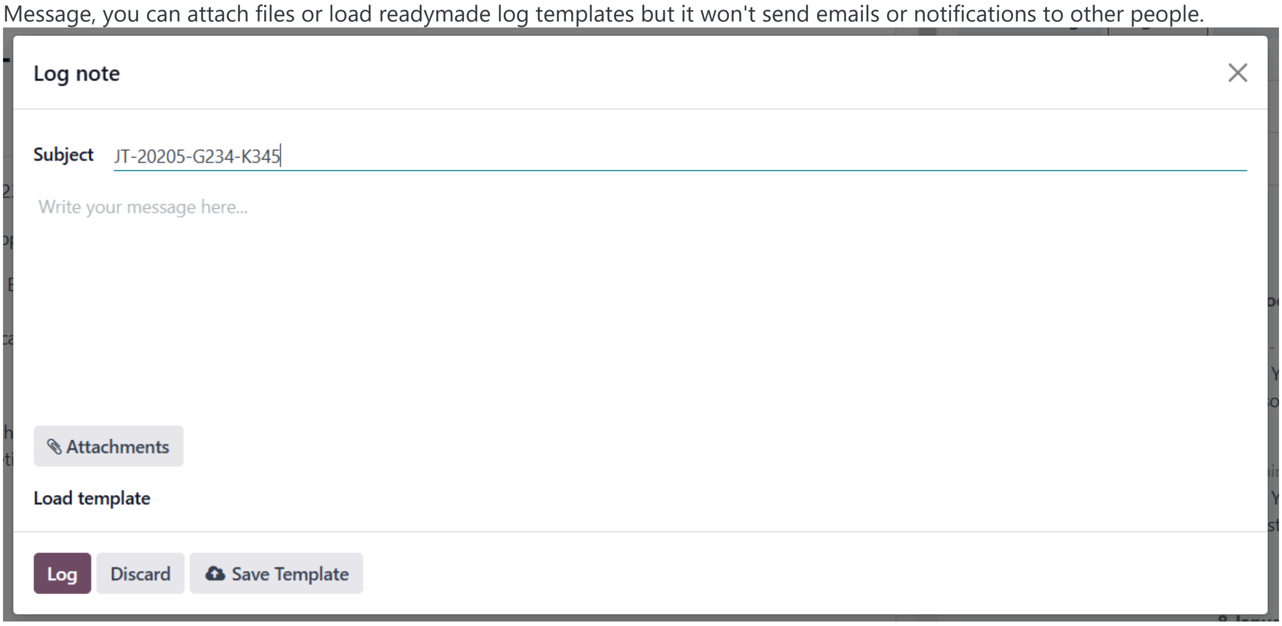
On the right part of the form view, you will see certain menus like this which can be used mostly for communication purposes. We will go through them one by one.



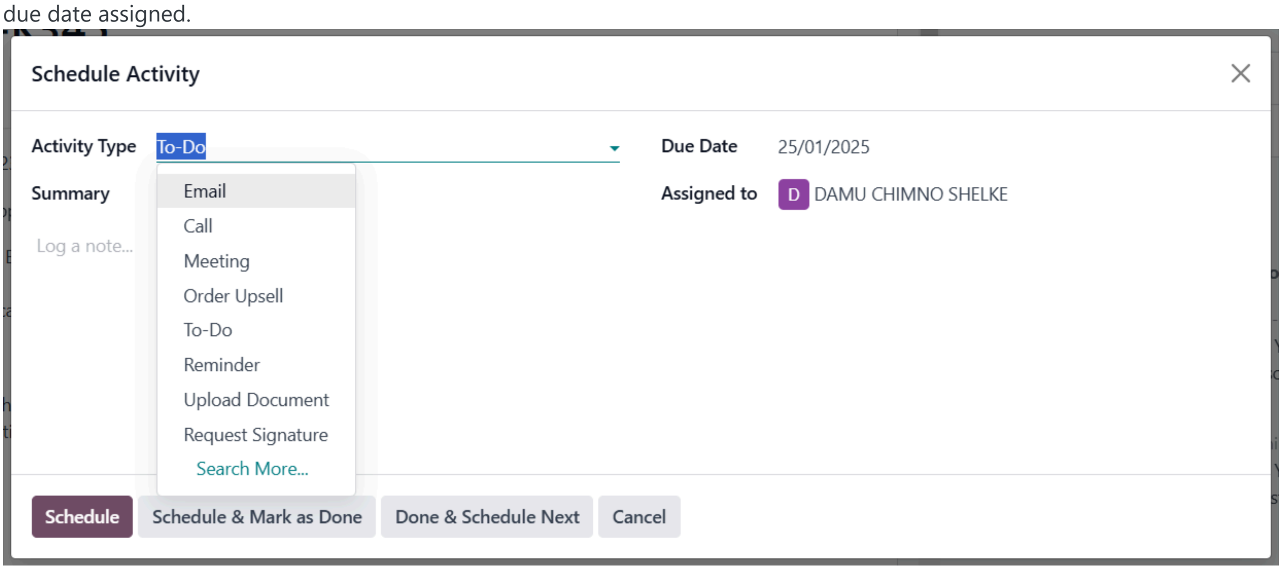
1. **Send Message :** Using this you can directly send an email to any person and followers of the documents directly from Odoo. You can use the expand button, and add a readymade template and attach any files and send to the required person.



2. **Log Note :** This can be used for internal communication or to mention any logs for that particular record. Similar to Send Message, you can attach files or load readymade log templates but it won't send emails or notifications to other people.



3. **Activities :** This can be used to assign any activities to any Odoo User which will be logged in and send reminders as per the due date assigned.



4. **Search Icon :** In Case you need to search for any logs within a particular record you can make use of this.
5. **Attachments :** You can attach any type of documents related to the record by clicking on that icon.
6. **Followers :** If you want any Odoo user to be able to see the record or notify them the updates of the records, you can add them as followers and they will also receive emails and other log notes as well.

7. **Knowledge :** This is a quick access button to check any type of information saved in the Knowledge Module to quickly view and add any content in the record.
8. **Log Note timing :** Every change and logs is recorded with timings which ensures transparency and traceability of the logs.

Hope that was interesting and easy to fill up your CRM Leads ! Let's move on to "Sales Module" and understand how to create new records there!