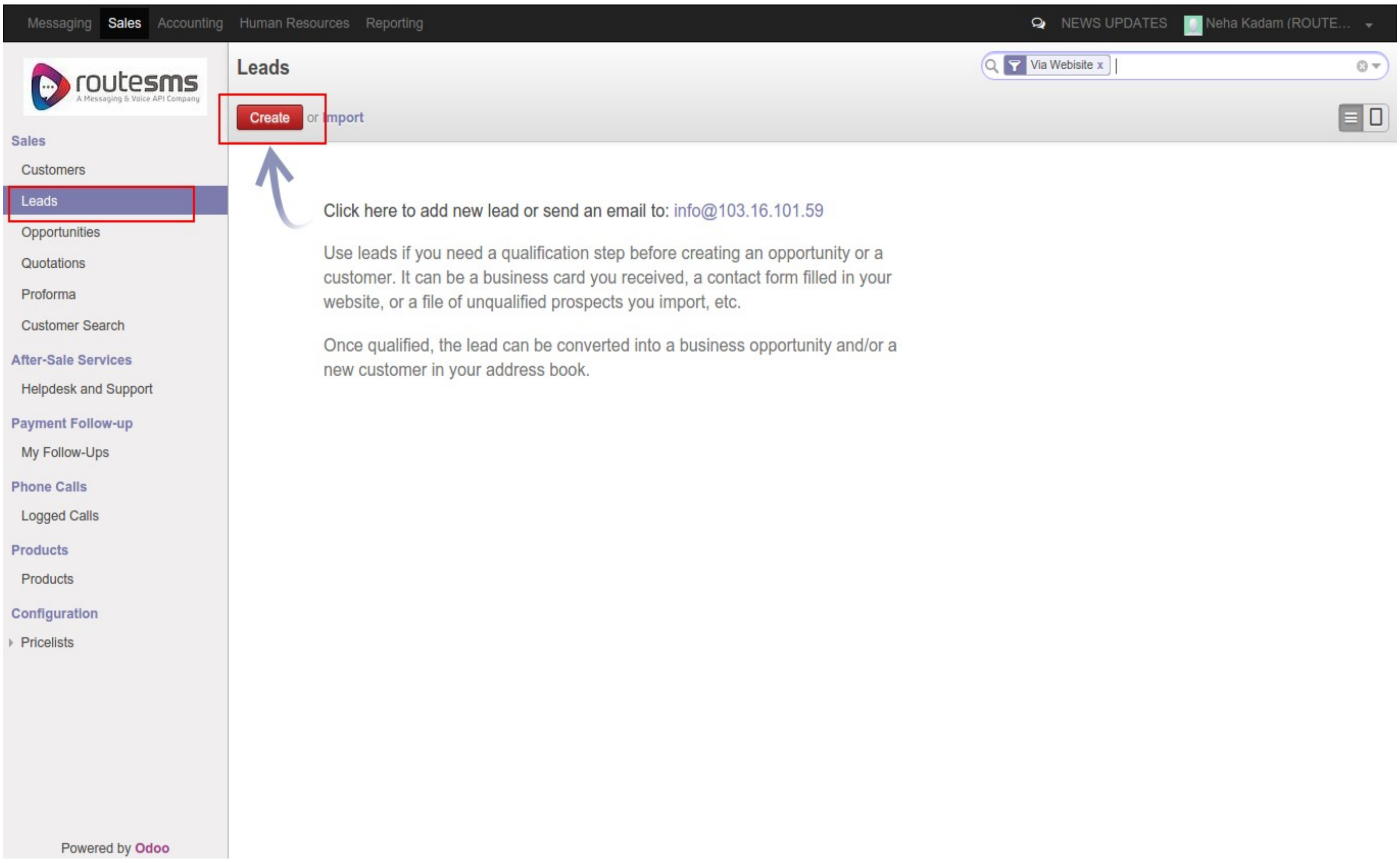
UNDERSTANDING DOCUMENT TO CREATE NEW CUSTOMER

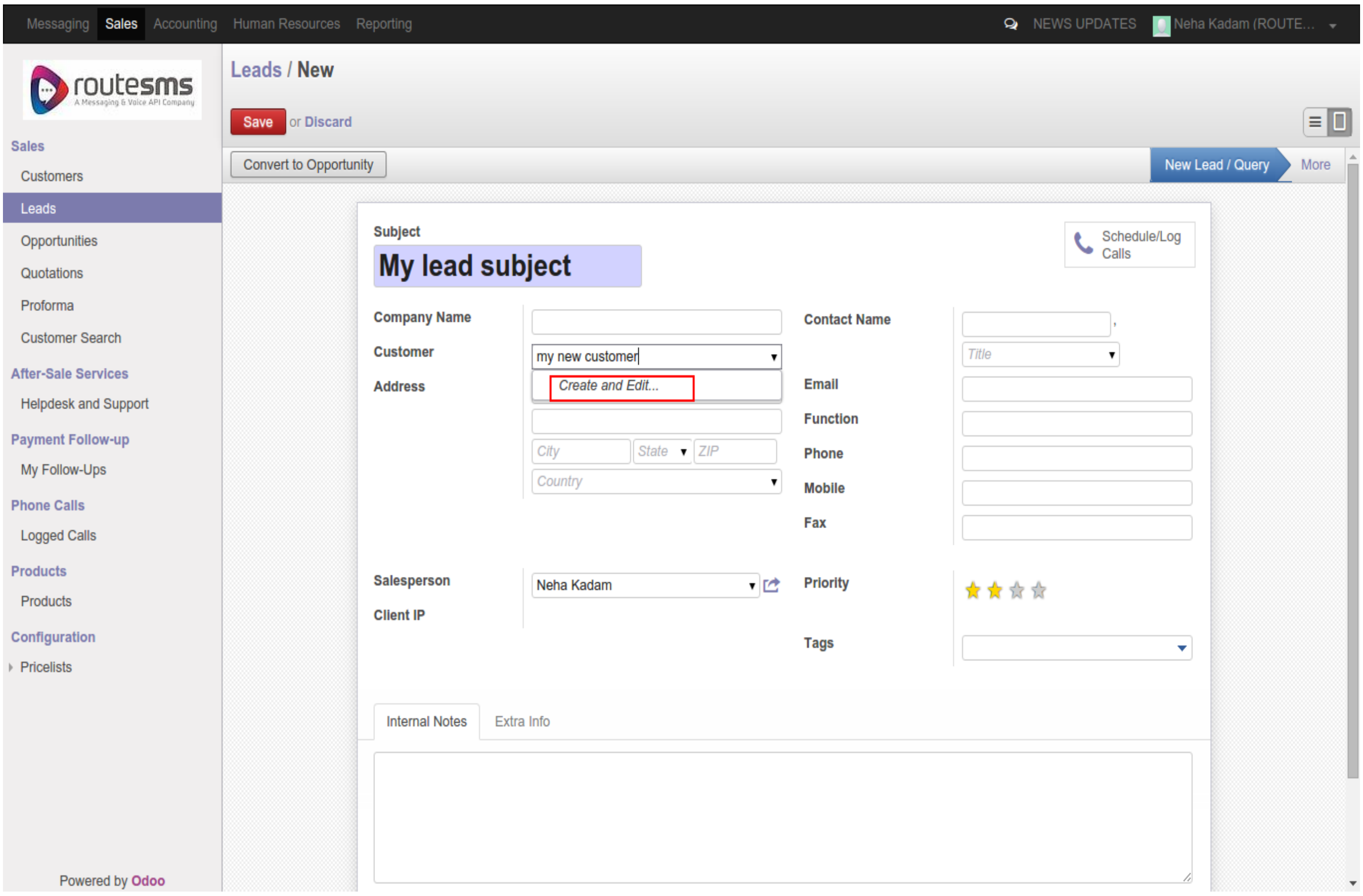
STEP 1:

* Go to sale->crm->create new lead



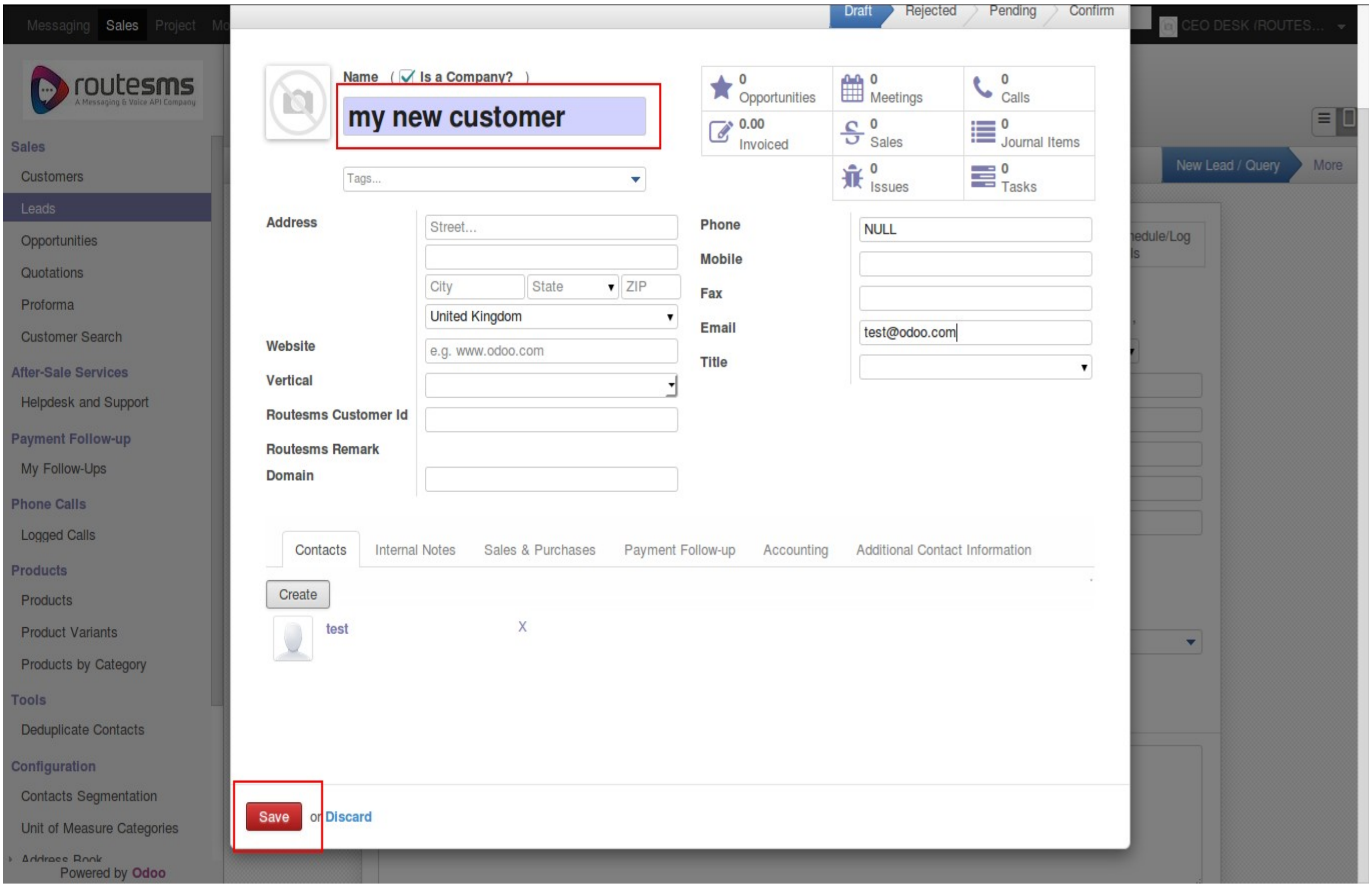
STEP 2:

* Enter new customer name (for sales team) ,supplier(for accounts team) and click “create & edit”



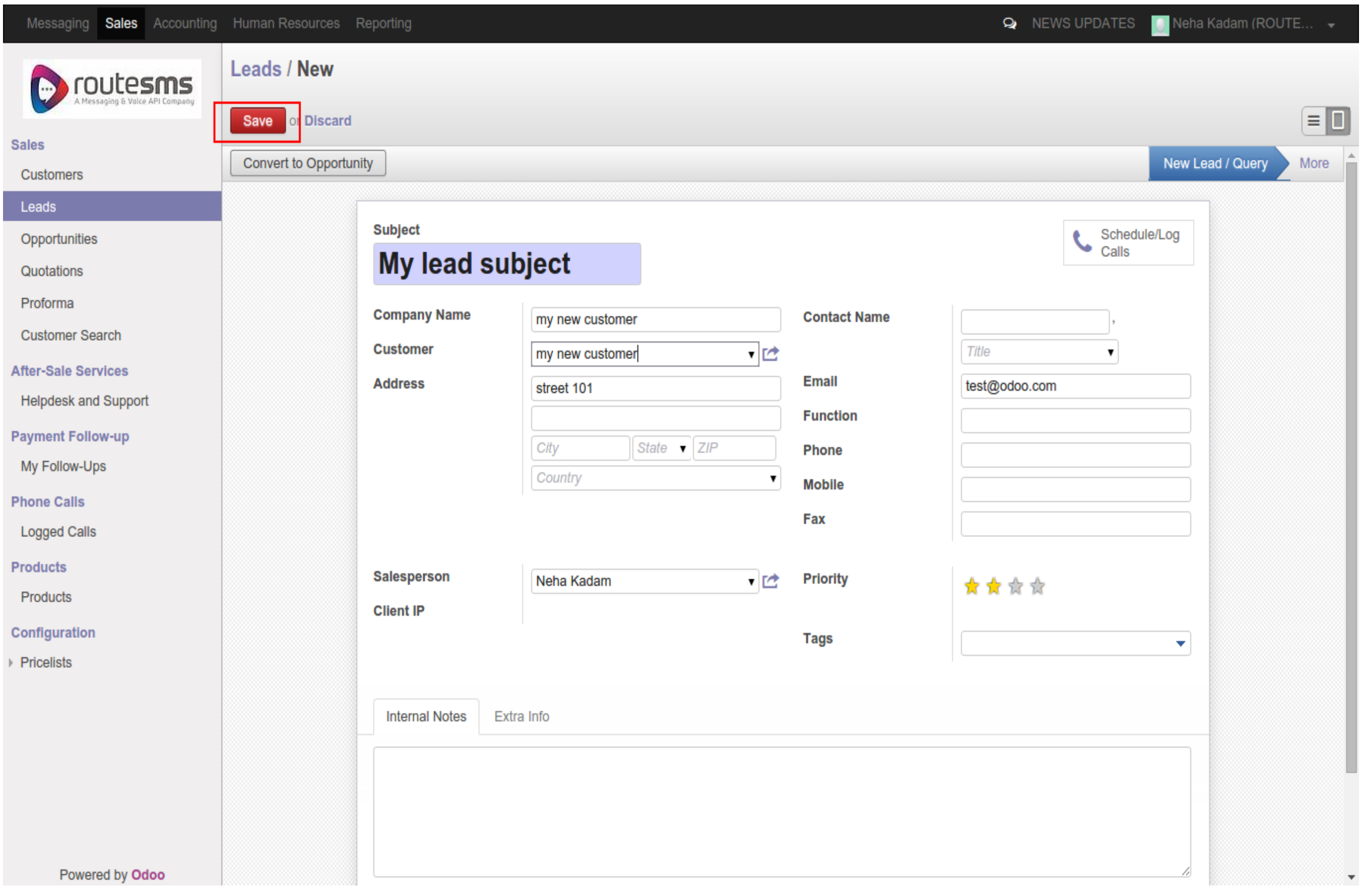
STEP 3:

* Enter client details and hit save button



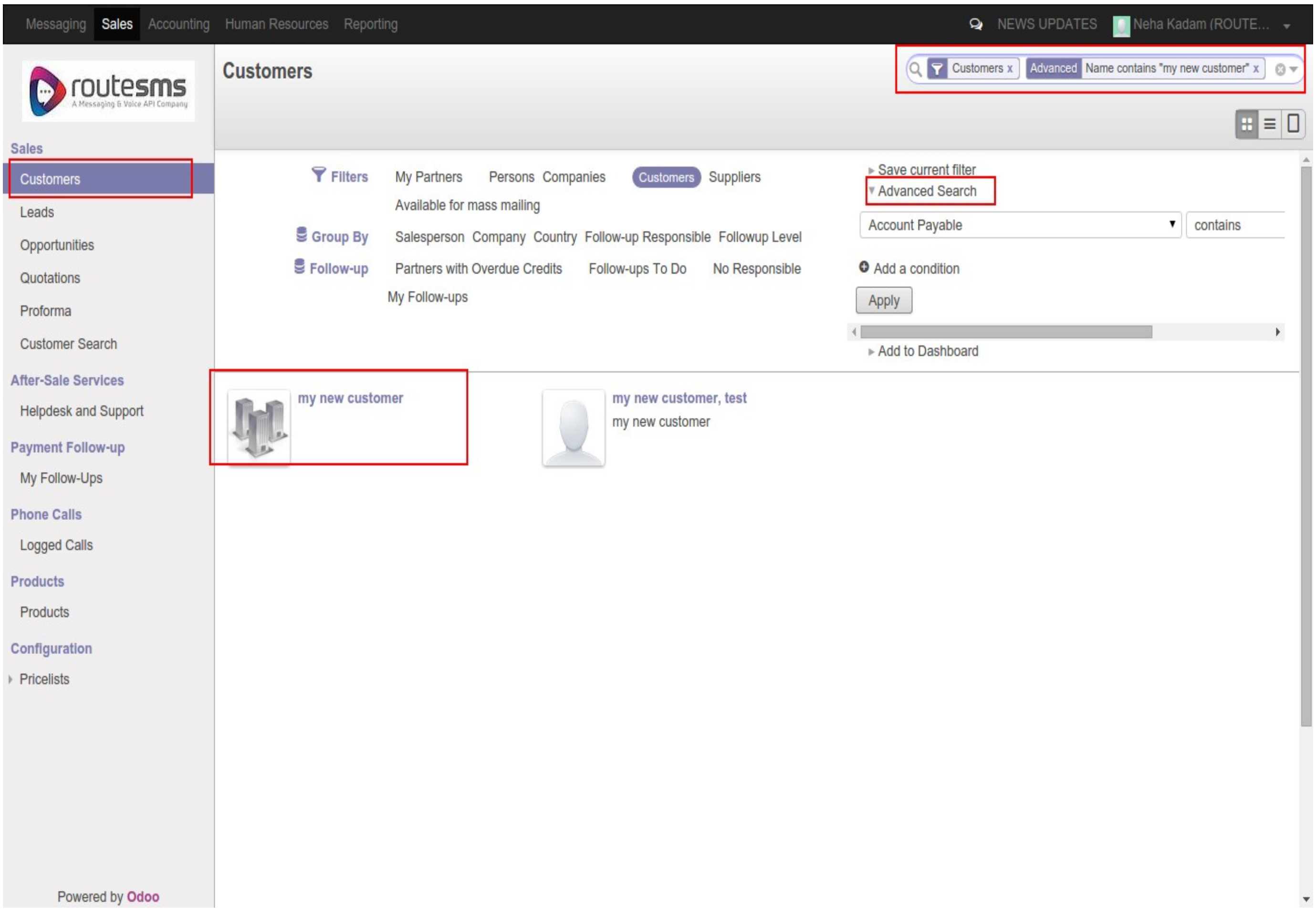
STEP 4:

* Save crm page



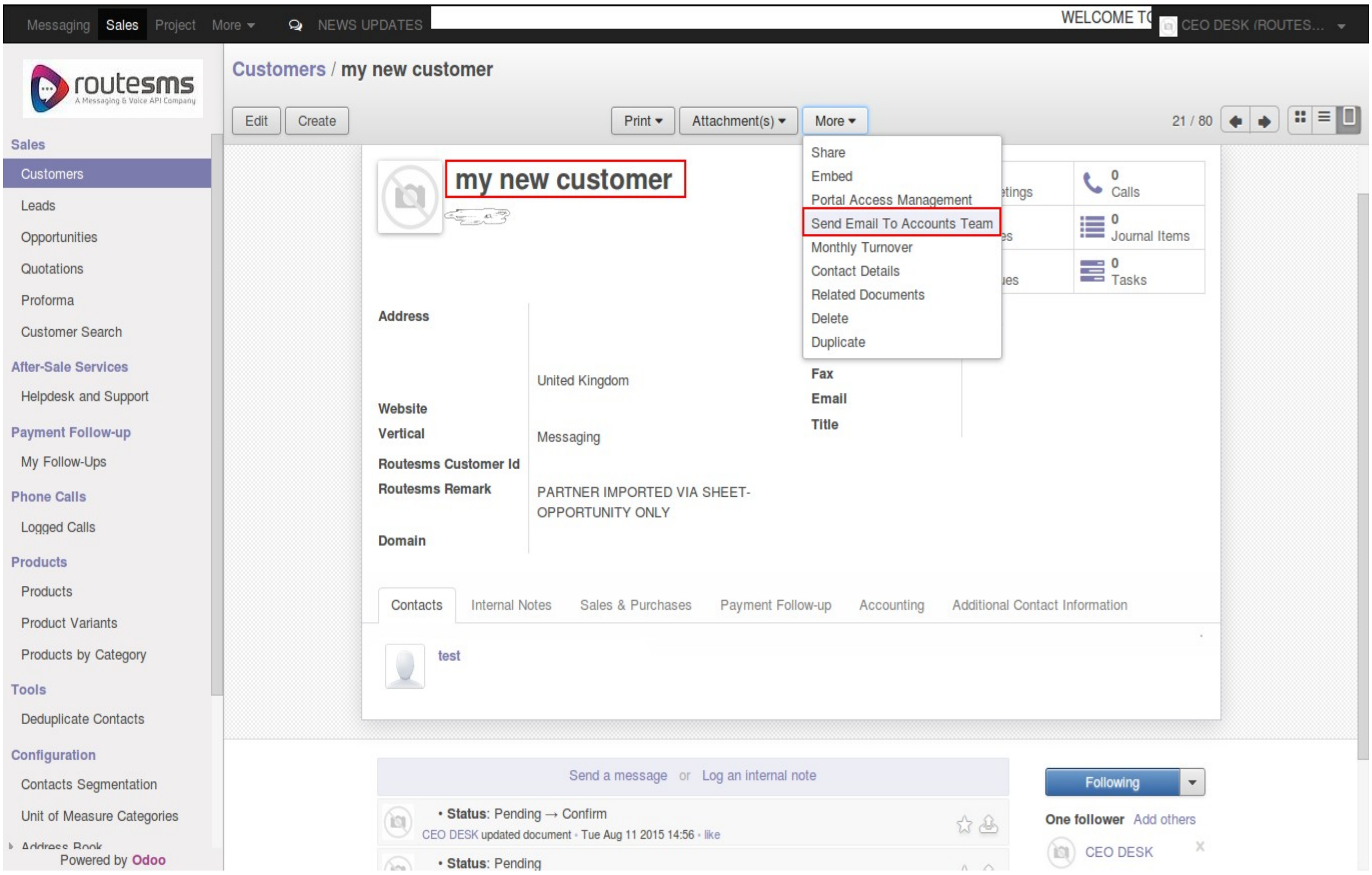
STEP 5:

* Go to Sale-> customer-> search newly created partner



STEP 6:

* Open record and send email notification to accounts team to request Odoo Id



THANK YOU