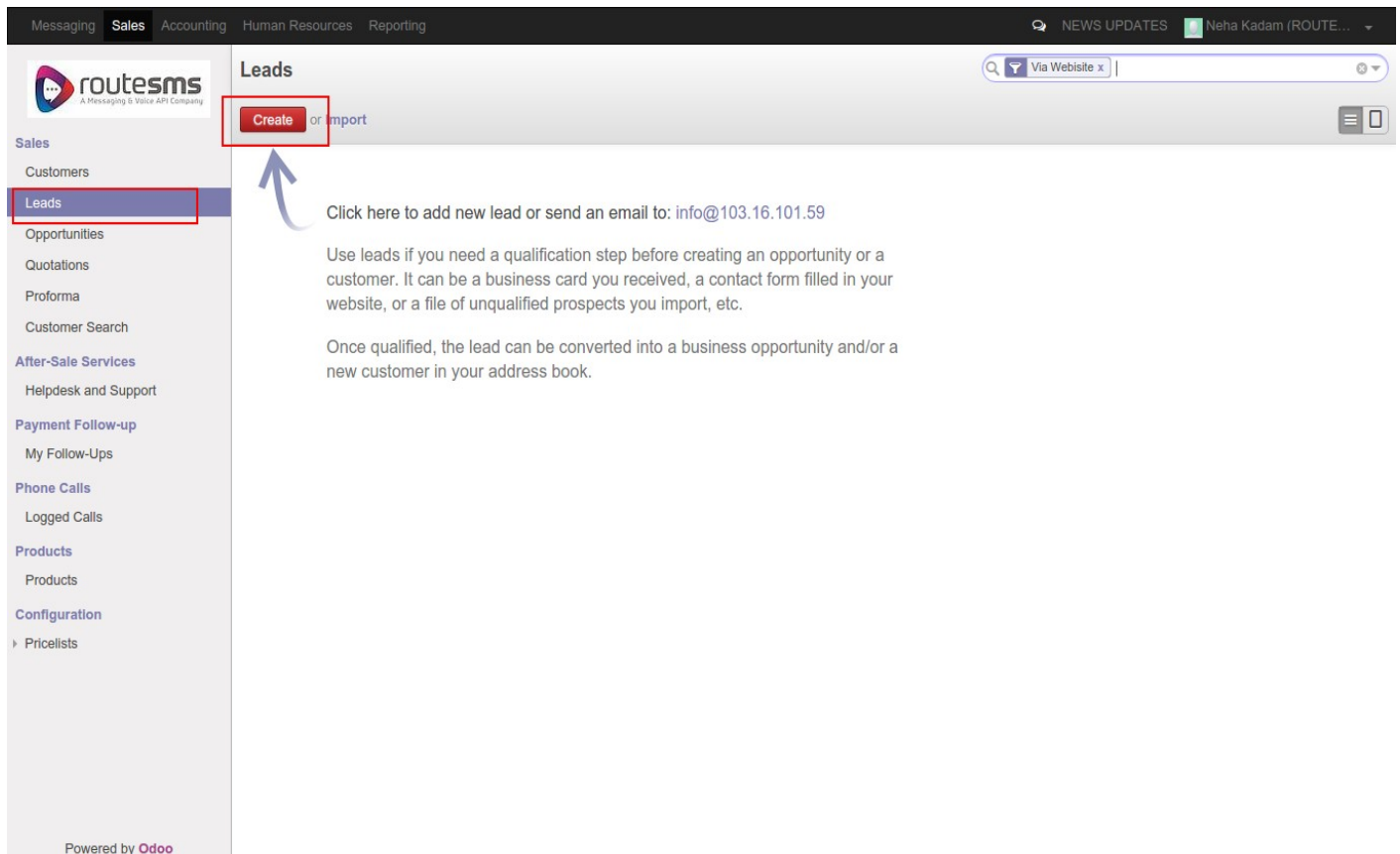


UNDERSTANDING DOCUMENT TO CREATE NEW CUSTOMER

STEP 1:

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



The screenshot displays the routesms CRM interface. The top navigation bar includes 'Messaging', 'Sales', 'Accounting', 'Human Resources', and 'Reporting'. The 'Sales' section is active, and the 'Leads' menu item in the left sidebar is highlighted. The main content area is titled 'Leads' and features a search bar with 'Via Website x' and a user profile for 'Neha Kadam (ROUTE...)'. Below the search bar, there is a red 'Create' button and a link 'or import'. A blue arrow points from the text instructions to the 'Create' button. The text instructions state: 'Click here to add new lead or send an email to: info@103.16.101.59'. Below this, it explains that leads are used for qualification before creating an opportunity or a customer, and that a qualified lead can be converted into a business opportunity and/or a new customer in the address book. The footer indicates 'Powered by Odoo'.

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Leads

Create or import

Click here to add new lead or send an email to: info@103.16.101.59

Use leads if you need a qualification step before creating an opportunity or a customer. It can be a business card you received, a contact form filled in your website, or a file of unqualified prospects you import, etc.

Once qualified, the lead can be converted into a business opportunity and/or a new customer in your address book.


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STEP 2:

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

MessagingSalesAccountingHuman ResourcesReporting

NEWS UPDATESNeha Kadam (ROUTE...)

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Sales

Customers

Leads

Opportunities

Quotations

Proforma

Customer Search

After-Sale Services

Helpdesk and Support

Payment Follow-up

My Follow-Ups

Phone Calls

Logged Calls

Products

Products

Configuration

Pricelists

Leads / New

Save or Discard

Convert to Opportunity

New Lead / QueryMore

Subject

My lead subject

Schedule/Log Calls

Company Name

Contact Name

Customer

Address

Salesperson

Client IP

City

State

ZIP

Country

my new customer

Create and Edit...

Neha Kadam

Client IP

Email

Function

Phone

Mobile

Fax

Priority

Tags

Title

★★★★

Internal Notes

Extra Info

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STEP 3:

* Enter client details and hit save button

The screenshot displays the 'Add New Customer' form in the routesms CRM. The form is divided into several sections:

- Name:** A text field containing 'my new customer' is highlighted with a red box. Above it is a checkbox labeled 'Is a Company?' which is checked.
- Tags:** A dropdown menu labeled 'Tags...' is located below the name field.
- Address:** Fields for 'Street...', 'City', 'State' (dropdown), 'ZIP', and 'Country' (dropdown set to 'United Kingdom').
- Website:** A text field with a placeholder 'e.g. www.odoo.com'.
- Vertical:** A dropdown menu.
- Routesms Customer Id:** A text field.
- Routesms Remark:** A text area.
- Domain:** A text field.
- Phone:** Fields for 'Phone', 'Mobile', 'Fax', 'Email' (containing 'test@odoo.com'), and 'Title' (dropdown).
- Status Metrics:** A grid showing counts for Opportunities (0), Meetings (0), Calls (0), Invoiced (0.00), Sales (0), Journal Items (0), Issues (0), and Tasks (0).
- Buttons:** A 'Create' button is located below the form fields. At the bottom left, a red box highlights the 'Save' button, with a 'Discard' button next to it.
- Footer:** The bottom of the page shows 'Powered by Odoo'.

STEP 4:

* Save crm page

MessagingSalesAccountingHuman ResourcesReporting

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Leads / New

SaveDiscard

Convert to Opportunity

New Lead / QueryMore

Subject

My lead subject

Schedule/Log Calls

Company Name

my new customer

Contact Name

Customer

my new customer

Title

Address

street 101

Email

test@odoo.com

City

State

ZIP

Function

Country

Phone

Salesperson

Neha Kadam

Mobile

Client IP

Fax

Priority

☆☆☆☆

Tags

Internal Notes

Extra Info

Powered by Odoo

STEP 5:

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

The screenshot displays the routesms CRM interface. The top navigation bar includes tabs for Messaging, Sales, Accounting, Human Resources, and Reporting. The user is logged in as Neha Kadam (ROUTE...). The left sidebar shows the Sales menu with 'Customers' highlighted. The main content area is titled 'Customers' and features a search bar at the top right with filters for 'Customers x' and 'Advanced Name contains "my new customer" x'. Below the search bar, there are tabs for 'Filters', 'My Partners', 'Persons', 'Companies', 'Customers', and 'Suppliers'. The 'Customers' tab is active, showing a list of customers. The first customer is 'my new customer' with a red box around its icon. The second customer is 'my new customer, test my new customer' with a red box around its name. The interface also includes a 'Save current filter' button, an 'Advanced Search' button, and a search condition 'Account Payable contains'.

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Customers

Filters My Partners Persons Companies Customers Suppliers

Available for mass mailing

Group By Salesperson Company Country Follow-up Responsible Followup Level

Follow-up Partners with Overdue Credits Follow-ups To Do No Responsible My Follow-ups

Save current filter
Advanced Search

Account Payable contains

Add a condition
Apply

Add to Dashboard

my new customer

my new customer, test
my new customer

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STEP 6:

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

The screenshot displays the Routesms CRM interface. The top navigation bar includes 'Messaging', 'Sales', 'Project', and 'More'. The main header shows 'WELCOME TO CEO DESK / ROUTES...' and '21 / 80'. The left sidebar lists various modules: Sales, Customers, Leads, Opportunities, Quotations, Proforma, Customer Search, After-Sale Services, Helpdesk and Support, Payment Follow-up, My Follow-Ups, Phone Calls, Logged Calls, Products, Product Variants, Products by Category, Tools, Deduplicate Contacts, Configuration, Contacts Segmentation, and Unit of Measure Categories. The main content area is titled 'Customers / my new customer' and features a 'my new customer' record. A dropdown menu is open, showing options: Share, Embed, Portal Access Management, Send Email To Accounts Team (highlighted), Monthly Turnover, Contact Details, Related Documents, Delete, and Duplicate. The record details include Address (United Kingdom), Website (Vertical), Routesms Customer Id (Messaging), Routesms Remark (PARTNER IMPORTED VIA SHEET- OPPORTUNITY ONLY), and Domain. The bottom section shows a message log with a status 'Pending' and a note 'CEO DESK updated document - Tue Aug 11 2015 14:56 - like'. The footer indicates 'Powered by Odoo'.

THANK YOU