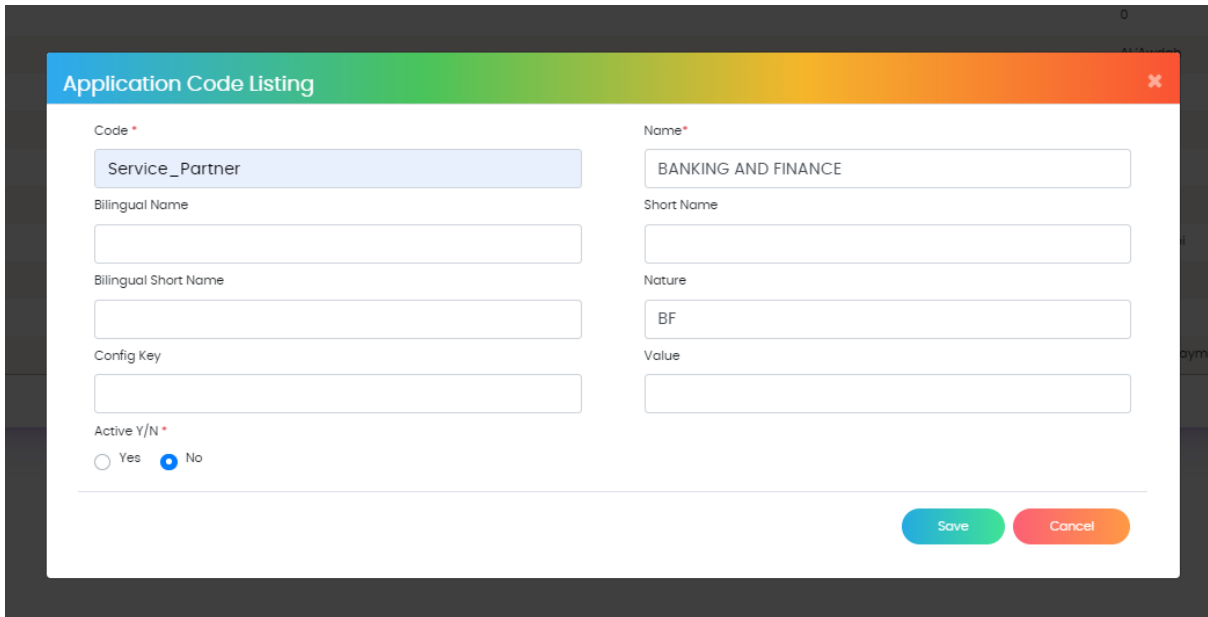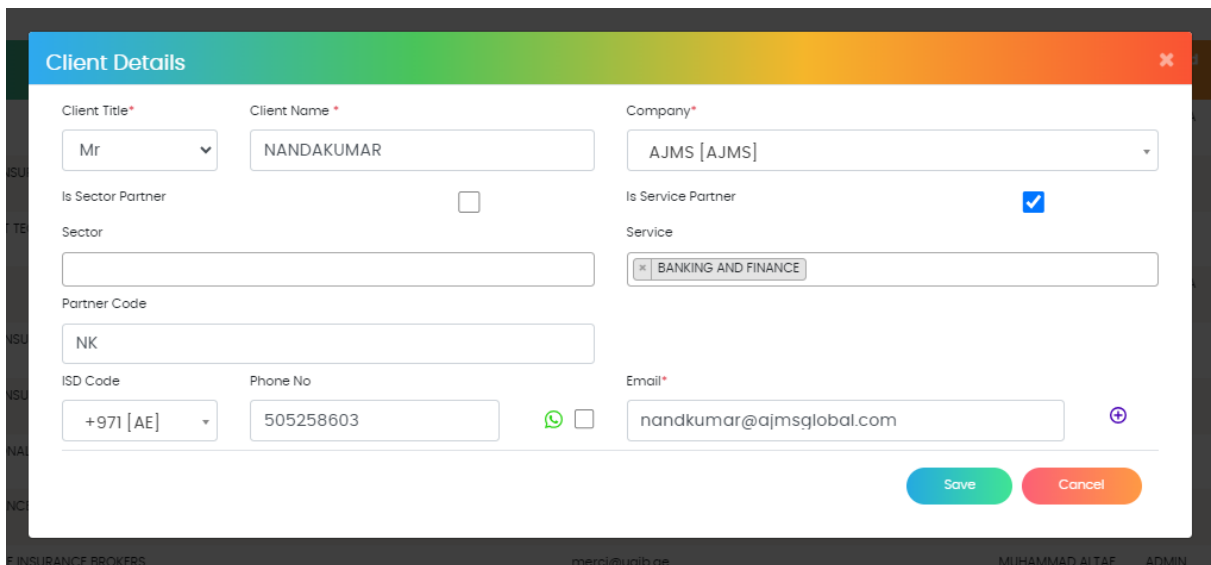## Steps to create new user credentials in CRM Portal

1. Go to 'App Codes' menu and click on 'Add'.

In the above pop-up, fill in the details as shown above.
- If the new user is service partner, enter '**Service_Partner'** in the 'Code' field. If the user is sector partner, enter '**Sector_Partner'** in the 'Code' filed.
- Enter the service/sector name in 'Name' field.
- Enter initials of service/sector in 'Nature' field.
- Select 'No' in Active Y/N.

2. Go to 'Leads' menu and select 'Client' tab.
   Click on Add button.

Mark the checkbox accordingly and enter all other details as shown above.

Credentials-   Username- email id provided in the Client Details,
                Password – crm@123