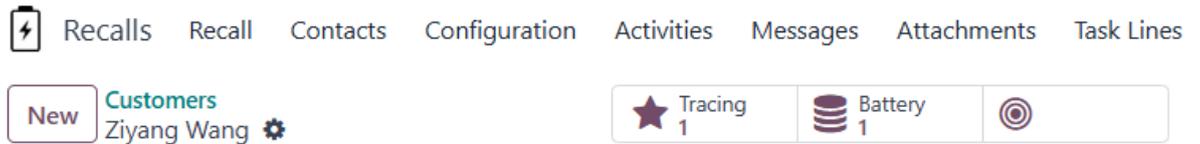
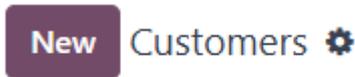


## How to create a Customer in Odoo 101

1. Then at the top the screen you can click on the linked Tracing Screen



2. If there were no corresponding customer cards then you create a new one. By clicking the New button.



3. First you need to confirm if the customer is an individual or company.



4. At a minimum on a customer card you need;

- Name
- Postcode
- Contact information (phone/email)

Individual  Company

The image shows a screenshot of the Odoo customer creation form. It includes fields for 'First name', 'Last name', and 'Company Name...'. There are checkboxes for 'Not-Affected Customer' and 'Is Site Address'. The 'Contact' section has fields for 'Street...', 'Street 2...', 'City', 'State', 'ZIP', and 'Country'. There are also fields for 'Phone', 'Mobile', and 'Email'. A 'Tags' field is present with the example text 'e.g. "B2B", "VIP", "Consulting", ...'. On the right side, there is a camera icon with a plus sign inside a square box.

5. At a minimum on a company card you need;

- Company's Name
- Employee's Name
- Position
- Full Address
- Company Phone
- Company Email

Individual  Company

e.g. Lumber Inc



Employee's Name ?

Position

Is Site Address

**Address**

Street...

Street 2...

City

State

ZIP

Country

Phone

Mobile

Email

Tags

e.g. "B2B", "VIP", "Consulting", ...

**Agreed to perform  
rectification works  
(Installer Only)**