

02

Creating and Managing Contacts

Odoo 19 Enterprise • Contacts

Keep your contact database accurate and complete.

1 Create a contact

Contacts  **NEW**

Click New to create a contact.

CONTACT FIELDS

Name *	Full name for individuals, company name for companies.
Company Name	For individuals: the company they work for. Links this contact to the company record.
Job Position	Their role at the company.
Phone / Mobile	Phone numbers. Mobile is used for SMS and WhatsApp.
Email *	Primary email. Used for all Odoo communications.
Website	Company website URL.
Tags	Labels for filtering e.g. "VIP Customer", "Supplier", "Cold Lead".
Customer Rank	Auto-calculated based on sales activity. Higher rank = more purchases.
Supplier Rank	Auto-calculated based on purchase activity.

2 Sales and Purchase tab

SALES AND PURCHASE TAB FIELDS

Salesperson	Default salesperson assigned to opportunities and orders for this contact.
Payment Terms	Default payment terms applied to invoices and bills.
Fiscal Position	Tax mapping rule applied to all transactions with this contact.
Pricelist	Default pricelist for sales orders.
Bank Account	Bank details for vendor payment by transfer.

3 Merge duplicates

Contacts → (select duplicates) → Action → Merge

Duplicate contacts accumulate over time – from imports, web forms, and manual entry. Select two or more duplicates, click Action > Merge. Choose the master record. All linked records (invoices, opportunities, purchase orders) transfer to the master and duplicates are archived.

Deduplication tool – Enable the Deduplication feature in Contacts settings. Odoo then scans for contacts with similar names or emails and presents them for review. Run this monthly to keep the database clean.