

# 06

## Customers

Odoo 19 Enterprise · CRM

The Customers section in CRM gives you a dedicated view of all your customer and prospect contacts, with their full interaction history.

### 1 View customers

CRM → Sales → Customers

The Customers view shows all contacts linked to CRM activities. Switch between Kanban, List, and Map views. Each customer card shows their name, company, city, phone, and email. Click any customer to open their full contact record with complete interaction history.

### 2 Customer record

A customer record holds: contact details, address, company relationship, tags, and the Sales & Purchase tab with default salesperson, sales team, payment terms, and fiscal position. The chatter shows all emails, calls, and notes. Smart buttons at the top link to all related opportunities, quotations, invoices, and meetings.

### 3 Merge duplicate customers

CRM → Sales → Customers → (select duplicates) → Action → Merge

Duplicate customer records are common when contacts are created from multiple sources. Select two or more duplicate records, click Action → Merge. Choose the master record to keep. Odoo transfers all linked opportunities, invoices, and history to the master record and archives the duplicates.

**Prevent duplicates** Odoo warns you when creating a contact with a similar name or email. Always check the suggestions before creating a new contact → merge at creation time rather than later.