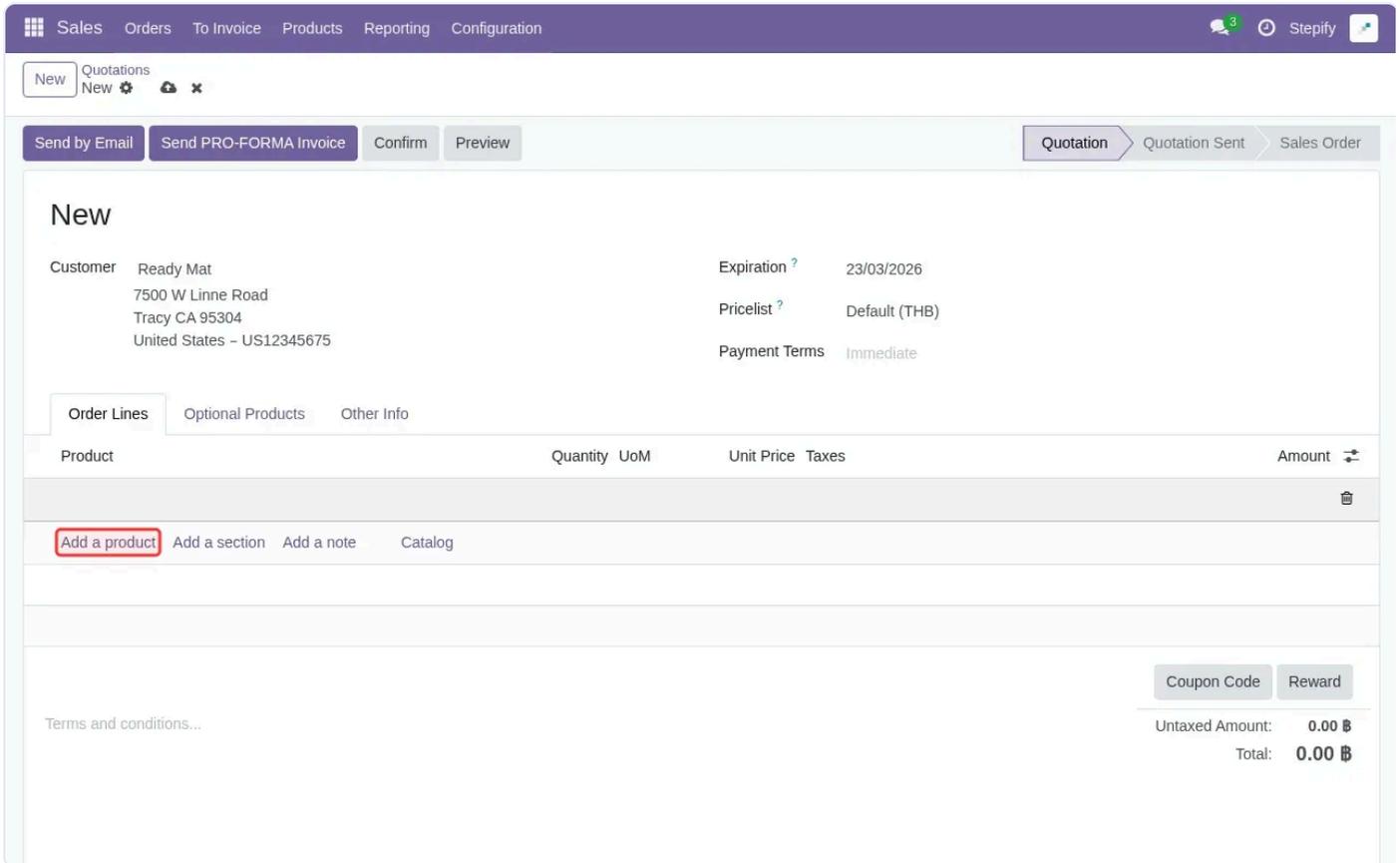


How to create a new sales order in Odoo CRM

Odoo CRM 6 steps · 3m 29s

1 Click 'Sales' in sidebar to navigate to Sales app.



The screenshot shows the Odoo CRM interface for creating a new quotation. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The main header area contains a 'New Quotations' button and a 'New' button. Below this, there are buttons for 'Send by Email', 'Send PRO-FORMA Invoice', 'Confirm', and 'Preview'. The 'Quotation' step is highlighted in the process flow, with 'Quotation Sent' and 'Sales Order' as subsequent steps.

The 'New' form displays the following information:

- Customer:** Ready Mat, 7500 W Linne Road, Tracy CA 95304, United States - US12345675
- Expiration:** 23/03/2026
- Pricelist:** Default (THB)
- Payment Terms:** Immediate

The 'Order Lines' tab is active, showing a table with columns: Product, Quantity, UoM, Unit Price, Taxes, and Amount. A red box highlights the 'Add a product' button. Other buttons include 'Add a section', 'Add a note', and 'Catalog'.

At the bottom right, there are buttons for 'Coupon Code' and 'Reward'. The summary shows:

- Untaxed Amount: 0.00 €
- Total: 0.00 €

2 Click 'New' to create sales order.

Sales Orders To Invoice Products Reporting Configuration

Quotations New

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New

Customer Ready Mat
7500 W Linne Road
Tracy CA 95304
United States - US12345675

Expiration ? 23/03/2026
Pricelist ? Default (THB)
Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product Add a section Add a note Catalog					

Terms and conditions...

Coupon Code Reward

Untaxed Amount: 0.00 B
Total: 0.00 B

3 Click Customer field to select a customer.

Sales Orders To Invoice Products Reporting Configuration

Quotations New

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New

Customer

Expiration ? 23/03/2026
Pricelist ?
Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product Add a section Add a note Catalog					

Terms and conditions...

Coupon Code Reward

Untaxed Amount: 0.00 B
Total: 0.00 B

4 Select 'Ready Mat' customer from dropdown.

The screenshot shows a software interface for creating a new quotation. At the top, there is a navigation bar with 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. On the right, there are icons for chat (3), a refresh button, and a 'Stepify' button. Below the navigation bar, there is a 'New' button and a 'Quotations' tab. The main area has several buttons: 'Send by Email', 'Send PRO-FORMA Invoice', 'Confirm', and 'Preview'. On the right side of this area, there are tabs for 'Quotation', 'Quotation Sent', and 'Sales Order'. The main content area is titled 'New' and contains a 'Customer' dropdown menu. The dropdown menu is open, showing a list of customer names: 'Ready Mat', 'Ready Mat, Billy Fox', 'Ready Mat, Edith Sanchez', 'Ready Mat, Julie Richards', 'Ready Mat, Kim Snyder', 'Ready Mat, Sandra Neal', 'Ready Mat, Theodore Gardner', and 'Ready Mat, Travis Mendoza'. The 'Ready Mat' option is highlighted with a red box. Below the dropdown, there are fields for 'Expiration?' (23/03/2026), 'Pricelist?' (Default (THB)), and 'Payment Terms' (Immediate). There is also a table with columns for 'Product', 'Quantity', 'UoM', 'Unit Price', 'Taxes', and 'Amount'. At the bottom right, there are buttons for 'Coupon Code' and 'Reward', and a summary section showing 'Untaxed Amount: 0.00 B' and 'Total: 0.00 B'.

5 Click 'Add a product' to add items to order.

The screenshot shows the same software interface as above, but now the 'Ready Mat' customer is selected. The 'Customer' field is filled with 'Ready Mat' and its address: '7500 W Linne Road, Tracy CA 95304, United States - US12345675'. The 'Expiration?' field is '23/03/2026', the 'Pricelist?' is 'Default (THB)', and the 'Payment Terms' is 'Immediate'. The 'Order Lines' tab is selected, and the table below it is empty. At the bottom of the table, there is a button labeled 'Add a product' which is highlighted with a red box. Other buttons in this row are 'Add a section', 'Add a note', and 'Catalog'. At the bottom right, there are buttons for 'Coupon Code' and 'Reward', and a summary section showing 'Untaxed Amount: 0.00 B' and 'Total: 0.00 B'.

6 Click save button to complete sales quotation creation.

Sales Orders To Invoice Products Reporting Configuration 3 Stepify

New Quotations New  

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New

Customer Ready Mat
7500 W Linne Road
Tracy CA 95304
United States - US12345675

Expiration ? 23/03/2026
Pricelist ? Default (THB)
Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product Add a section Add a note Catalog					

Terms and conditions...

Coupon Code Reward

Untaxed Amount: 0.00 €
Total: 0.00 €