

# 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.

Sales Orders To Invoice Products Reporting Configuration

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
<div>Add a product</div> <div>Add a section</div> <div>Add a note</div> <div>Catalog</div>					

Terms and conditions...

Coupon Code

Reward

Untaxed Amount:

0.00

Total:

0.00

## 2 Click 'New' to create sales order.

SalesOrdersTo InvoiceProductsReportingConfiguration

3Stepify

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

CustomerReady Mat7500 W Linne RoadTracy CA 95304United States - US12345675

Expiration ?23/03/2026

Pricelist ?Default (THB)

Payment TermsImmediate

Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a productAdd a sectionAdd a noteCatalog					

Terms and conditions...

Coupon CodeReward

Untaxed Amount:0.00฿

Total:0.00฿

## 3 Click Customer field to select a customer.

SalesOrdersTo InvoiceProductsReportingConfiguration

3Stepify

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

Customer

Expiration ?23/03/2026

Pricelist ?

Payment TermsImmediate

Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a productAdd a sectionAdd a noteCatalog					

Terms and conditions...

Coupon CodeReward

Untaxed Amount:0.00฿

Total:0.00฿

#### 4 Select 'Ready Mat' customer from dropdown.

SalesOrdersTo InvoiceProductsReportingConfiguration

3Stepify

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

Customer

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

Ready Mat, Travis Mendoza

Search More...

Start typing...

Expiration ?

23/03/2026

Pricelist ?

Payment Terms

Immediate

Order Lines

Product

Add a product

Quantity

UoM

Unit Price

Taxes

Amount

Coupon Code

Reward

Untaxed Amount:

0.00 \$

Total:

0.00 \$

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

SalesOrdersTo InvoiceProductsReportingConfiguration

3Stepify

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

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Default (THB)

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Optional Products

Other Info

Product

Quantity

UoM

Unit Price

Taxes

Amount

Add a product

Add a section

Add a note

Catalog

Coupon Code

Reward

Untaxed Amount:

0.00 \$

Total:

0.00 \$

6 Click save button to complete sales quotation creation.

SalesOrdersTo InvoiceProductsReportingConfiguration

3Stepify

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

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Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a productAdd a sectionAdd a noteCatalog					

Terms and conditions...

Coupon CodeReward

Untaxed Amount:0.00 ¢Total:0.00 ¢