

Opportunity-based order

Add order based on opportunity

Version 7.17



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PRODUCTS: SALES ENTERPRISE

You can create one or several orders based on an opportunity at any of the opportunity stages.

To add an order:

1. Open the opportunity by which you need to add an order.
2. Click [**Add order**] at the top of the opportunity page.
3. If you have any products added to the opportunity, Creatio will prompt to copy the products to the order. Select one of the following:
 - a. **All** - copies all products from the opportunity page to the created order.
 - b. **Select** - copies only selected products from the opportunity page to the created order. When clicking this button, the lookup window with the list of products will be displayed. Select the products you need and click [*Select*].
 - c. **Cancel** - cancel creating of the order.
4. The order page will open to populate additional information. For example, here you can generate the installment plan or specify delivery information.

As a result, Creatio will register the order connected to the selected opportunity. You can open the created order from the opportunity page by using the [*Opportunity history*] tab.