

Short sales, orders, and invoices

Create an order

Version 7.17



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PRODUCTS: SALES ENTERPRISE SALES COMMERCE

In Creatio, you can add installment plans, product lists, discounts and other data.

To do this:

1. Open the [*Orders*] section.
2. Click [*New order*].
3. On the page that opens, specify the order recipient in the [*Customer*] required field. In the field, you can select a value from the existing contacts and accounts.
4. Go to the [*Products*] detail and add a list of goods and services included in the order. There are several methods of doing this:
 - a. Click + to open the product selection page.
 - b. Quick action menu of the  button → [*Add*].If necessary, add a discount on specific products in the [*Discount,%*] field. Learn more in the "[Add products to an invoice or an order](#)" article.
5. Go to the [*Order details*] tab and add an order installment plan. You can populate the installment plan either manually or via a template. Learn more in the "[Add an order installment plan](#)" article.
6. You can submit orders for approval to other Creatio users (e.g., approve order amount with managers) using the standard approval function. To do this, use the [*Send for approval*] action on the order page. The action opens an additional page, where you can select an employee that the document is sent to, and set other approval parameters. More information about this feature is available in the "[Approvals](#)" article.

After adding any data to any detail, the order will be autosaved. The order number is generated automatically in accordance with the "Order number mask" system setting (OrderCodeMask).