03

Creating Opportunities

Odoo 19 Enterprise Â· CRM

Opportunities can be created manually, converted from leads, generated by incoming emails, or imported. Each opportunity tracks all the information needed to pursue and close a deal.

1 Create an opportunity manually

CRM â–º **Sales** â–º **My Pipeline** â–º **NEW**

Click New in the pipeline view to create a new opportunity card inline. For a full form, click Add to open the detailed form. Fill in the core fields and save.

OPPORTUNITY HEADER FIELDS

Opportunity Title *	Descriptive name for this deal â€" e.g. "ERP Implementation â€" ABC Sdn Bhd".
Customer	Link to an existing customer or contact. If the company is new, type their name and create them on the fly.
Email / Phone	Contact details. Auto-filled if a customer is selected.
Expected Revenue	Estimated deal value in MYR. Used for pipeline forecasting.
Probability	Likelihood of winning. Auto-calculated based on stage but can be overridden.
Close Date	Expected date of closing the deal. Used in pipeline reports.
Salesperson *	Assigned salesperson. Defaults to the logged-in user.
Sales Team	Which sales team owns this opportunity.

2 Internal notes and extra information

The opportunity form has three tabs. The Extra Information tab holds the pipeline stage, priority (1-3 stars), tags, campaign source, and custom fields. The Internal Notes tab is a free-text area for private notes visible only to your team â€" not to the customer. Use it for context, concerns, or strategy notes.

Priority stars â€" Use the star rating (1-3) to flag high-priority opportunities. Filter by priority in the pipeline to focus on your most important deals.

3 Log a note or send an email

CRM â–º Sales â–º My Pipeline â–º (open opportunity) â–º Send message

The chatter at the bottom of every opportunity records all communications. Use Send message to email the customer directly from Odoo â€" the email is logged automatically. Use Log note to add an internal note visible only to your team. All incoming replies from the customer appear in the chatter automatically.

4 Mark as Won or Lost

MARK WON

When a deal is closed, click Mark Won (green button) or Mark Lost (in the action menu). For lost opportunities, Odoo asks for a lost reason â€" select from the configured list or type a new one. Won and lost opportunities are removed from the active pipeline but remain in the system for reporting.

> **Restore a lost opportunity â€"** Lost opportunities can be reactivated. Go to CRM â†' Sales â†' My Pipeline, add the filter "Lost", find the opportunity, and click Restore. It returns to the pipeline at its previous stage.