

03

Creating Opportunities

Odoo 19 Enterprise - 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 - Sales - My Pipeline **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 e.g. "ERP Implementation - 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 - not to the customer. Use it for context, concerns, or strategy notes.

Priority stars 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 → Sales → My Pipeline → (open opportunity) → Send message

The chatter at the bottom of every opportunity records all communications. Use Send message to email the customer directly from Odoo – 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 – 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 – Lost opportunities can be reactivated. Go to CRM → Sales → My Pipeline, add the filter "Lost", find the opportunity, and click Restore. It returns to the pipeline at its previous stage.