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Sales: from quotation to invoice

The **Sales** app handles the full sales cycle: quotation, sales order, delivery and invoice.

Create and send a quotation

1. Open **Sales** and click **New**.
2. Select the **Customer**. Their address, price list and payment terms are filled in automatically.
3. In **Order Lines**, click **Add a product**, choose the product and enter the quantity.
4. Click **Send by Email** to send the quotation as a PDF, or **Preview** to see what the customer will see on the portal.

Confirm the order

When the customer agrees, click **Confirm**. The quotation becomes a **sales order**. If the products are tracked in stock, a **Delivery** smart button appears at the top of the order.

Invoice the order

1. Click **Create Invoice**.
2. Choose **Regular invoice**, or a **Down payment** (percentage or fixed amount) if you ask for an advance.
3. Check the draft invoice and click **Confirm**.

Invoicing policy

Each product has an **Invoicing Policy**:

- **Ordered quantities**: you can invoice as soon as the order is confirmed.
- **Delivered quantities**: you can invoice only what has been delivered.

Tip: Enable **Sales ▸ Settings ▸ Online Signature** and **Online Payment** so customers can accept and pay the quotation directly from the email.