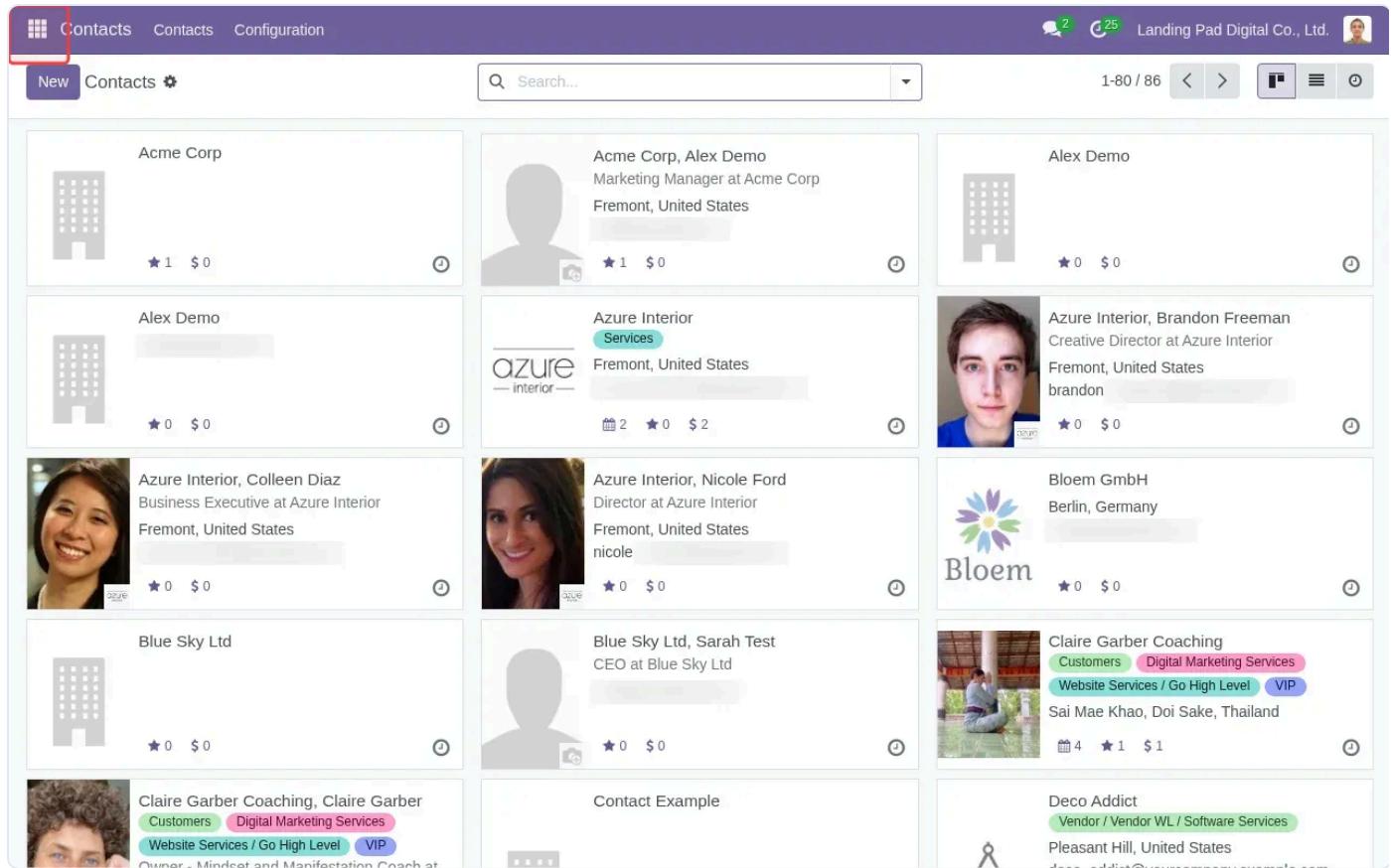


Create a new sales quotation for the customer Jane Doe

Odoo CRM 6 steps · 7m 54s

1 Click app switcher to access Sales app



The screenshot shows the Odoo CRM Contacts module. At the top, there is a navigation bar with 'Contacts' (highlighted with a red box), 'Contacts', and 'Configuration'. On the right, there are icons for messages (2), calls (25), and a user profile. The main area is a grid of contact cards. The first card is for 'Acme Corp' (Marketing Manager at Acme Corp, Fremont, United States). The second card is for 'Alex Demo' (Marketing Manager at Acme Corp, Fremont, United States). The third card is for 'Azure Interior Services' (Creative Director at Azure Interior, Fremont, United States). The fourth card is for 'Azure Interior, Colleen Diaz' (Business Executive at Azure Interior, Fremont, United States). The fifth card is for 'Azure Interior, Nicole Ford' (Director at Azure Interior, Fremont, United States). The sixth card is for 'Blue Sky Ltd' (CEO at Blue Sky Ltd). The seventh card is for 'Claire Garber Coaching' (Customer, Digital Marketing Services, Website Services / Go High Level, VIP, Pleasant Hill, United States). The eighth card is for 'Deco Addict' (Vendor / Vendor WL / Software Services, Pleasant Hill, United States). The ninth card is for 'Contact Example'.

2 Click 'Sales' in sidebar to navigate to Sales app.

Odoo Contacts App Screenshot

The sidebar on the left shows the following modules:

- Helpdesk
- Discuss
- Calendar
- To-do
- API APP
- Contacts** (selected)
- CRM
- Sales** (selected)
- Dashboards
- Payroll
- Accounting
- Project
- Timesheets
- Website
- Email Marketing
- Events
- Employees
- Attendances
- Recruitment
- Time Off

The main area displays a grid of contacts:

- Corp: Acme Corp, Alex Demo (Marketing Manager at Acme Corp, Fremont, United States)
- Alex Demo (Profile picture, ★ 0 \$ 0)
- Azure Interior Services: Azure Interior, Brandon Freeman (Creative Director at Azure Interior, Fremont, United States, brandon)
- Azure Interior, Nicole Ford (Director at Azure Interior, Fremont, United States)
- Bloem GmbH: Bloem GmbH (Berlin, Germany)
- Blue Sky Ltd, Sarah Test (CEO at Blue Sky Ltd)
- Claire Garber Coaching: Claire Garber Coaching (Customer, Digital Marketing Services, Website Services / Go High Level, VIP, Owner - Mindset and Manifestation Coach at Sai Mae Khaeo, Doi Sake, Thailand)
- Contact Example
- Deco Addict: Deco Addict (Vendor / Vendor WL / Software Services, Pleasant Hill, United States)

3 Click 'New' button to create a quotation.

Odoo Sales App Screenshot

The top navigation bar shows the following modules:

- Sales
- Orders
- To Invoice
- Products
- Reporting
- Configuration

The 'New' button in the top left is highlighted with a red box.

The main area displays a table of quotations:

Number	Creation Date	Customer	Salesperson	Activities	Company	Total	Status
S00007	11/02/2026 09:06:49	Azure Interior	Tata Admin Dev	⌚	Landing Pad Digital Co., Ltd.	0.00 ₱	Quotation
S00006	11/02/2026 08:27:45	Azure Interior	Tata Admin Dev	⌚	Landing Pad Digital Co., Ltd.	0.00 ₱	Quotation
S00005	11/02/2026 04:51:29	Jane Doe	Tata Admin Dev	⌚	Landing Pad Digital Co., Ltd.	\$ 0.00	Quotation
S00005	10/02/2026 13:53:18	Jane Doe	Tata Admin Dev	⌚	Landing Pad Digital Co., Ltd.	\$ 0.00	Quotation

4 Type 'Jane Doe' in the Customer field.

Sales Orders To Invoice Products Reporting Configuration

New Quotations New

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New

Customer Expiration 13/03/2026

Quotation Template Pricelist

Payment Terms Immediate

Order Lines Optional Products Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product					
Add a section					
Add a note					
Catalog					

Coupon Code Reward

Terms & Conditions: <https://portal.landingpad.digital/terms>

Untaxed Amount: 0.00 ₦ Total: 0.00 ₦

5 Select 'Jane Doe' from the customer dropdown.

Sales Orders To Invoice Products Reporting Configuration

New Quotations New

Send by Email Send PRO-FORMA Invoice Confirm Preview Quotation Quotation Sent Sales Order

New

Customer Jane Doe Expiration 13/03/2026

Quotation Template Jane Doe

Order Lines Optional Products Other Info

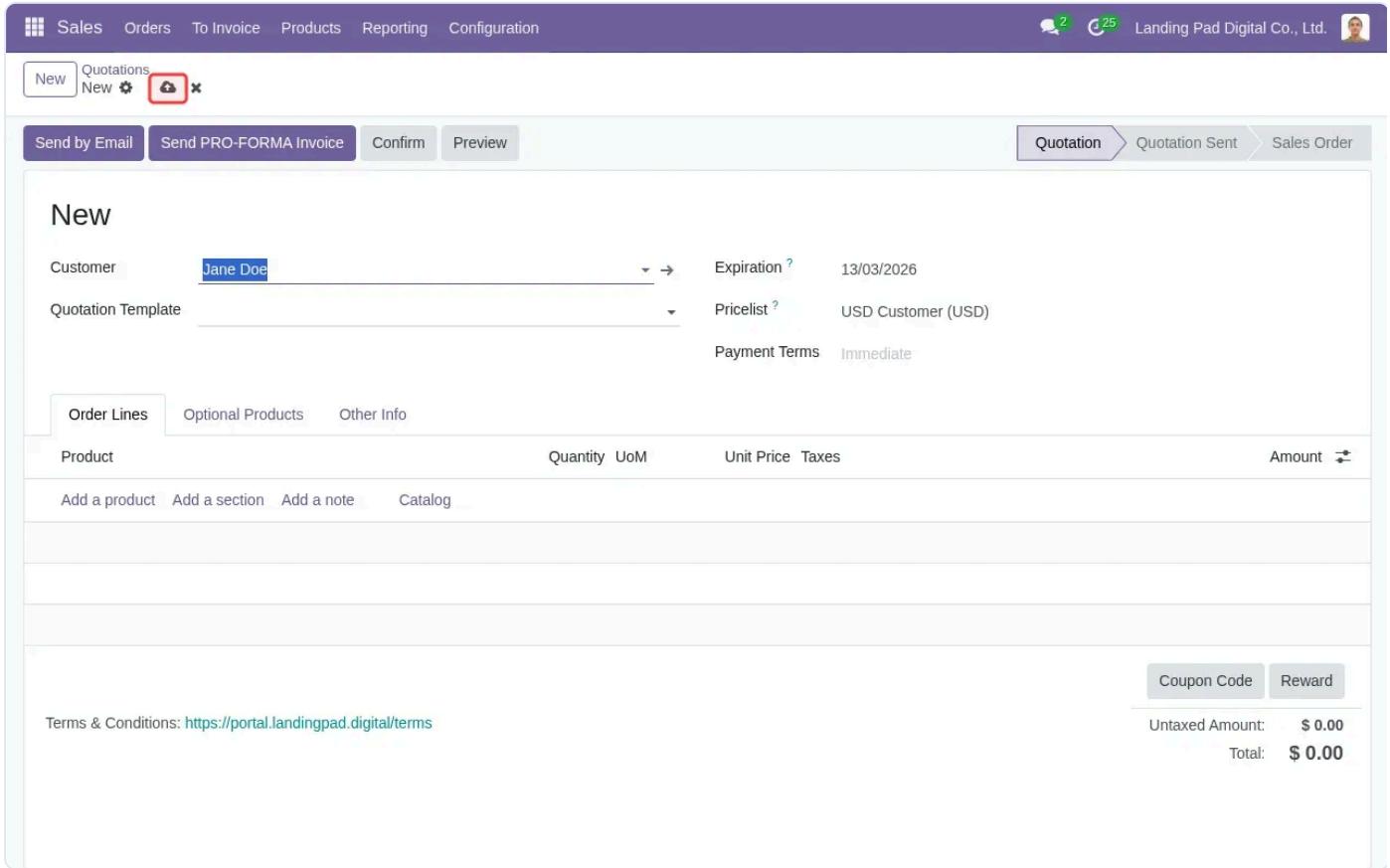
Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product					
Add a section					
Add a note					
Catalog					

Coupon Code Reward

Terms & Conditions: <https://portal.landingpad.digital/terms>

Untaxed Amount: 0.00 ₦ Total: 0.00 ₦

6 Click 'Save manually' button to save the quotation.



The screenshot shows the Odoo Sales Quotation interface. At the top, there is a navigation bar with links for Sales, Orders, To Invoice, Products, Reporting, and Configuration. On the right side of the bar, there are notifications for 2 messages and 25 emails, and a user profile for 'Landing Pad Digital Co., Ltd.' Below the navigation bar, there is a toolbar with buttons for New, Quotations, Send by Email, Send PRO-FORMA Invoice, Confirm, Preview, Quotation, Quotation Sent, and Sales Order. The main area is titled 'New' and contains fields for Customer (Jane Doe), Quotation Template, Expiration (13/03/2026), Pricelist (USD Customer (USD)), and Payment Terms (Immediate). Below these fields is a table for 'Order Lines' with columns for Product, Quantity, UoM, Unit Price, Taxes, and Amount. There are buttons for Add a product, Add a section, Add a note, and Catalog. At the bottom right, there are buttons for Coupon Code and Reward. The bottom of the interface shows terms and conditions and untaxed amount information.

New

Customer: Jane Doe

Quotation Template

Expiration: 13/03/2026

Pricelist: USD Customer (USD)

Payment Terms: Immediate

Order Lines

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a product					
Add a section					
Add a note					
Catalog					

Terms & Conditions: <https://portal.landingpad.digital/terms>

Untaxed Amount: \$ 0.00

Total: \$ 0.00

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