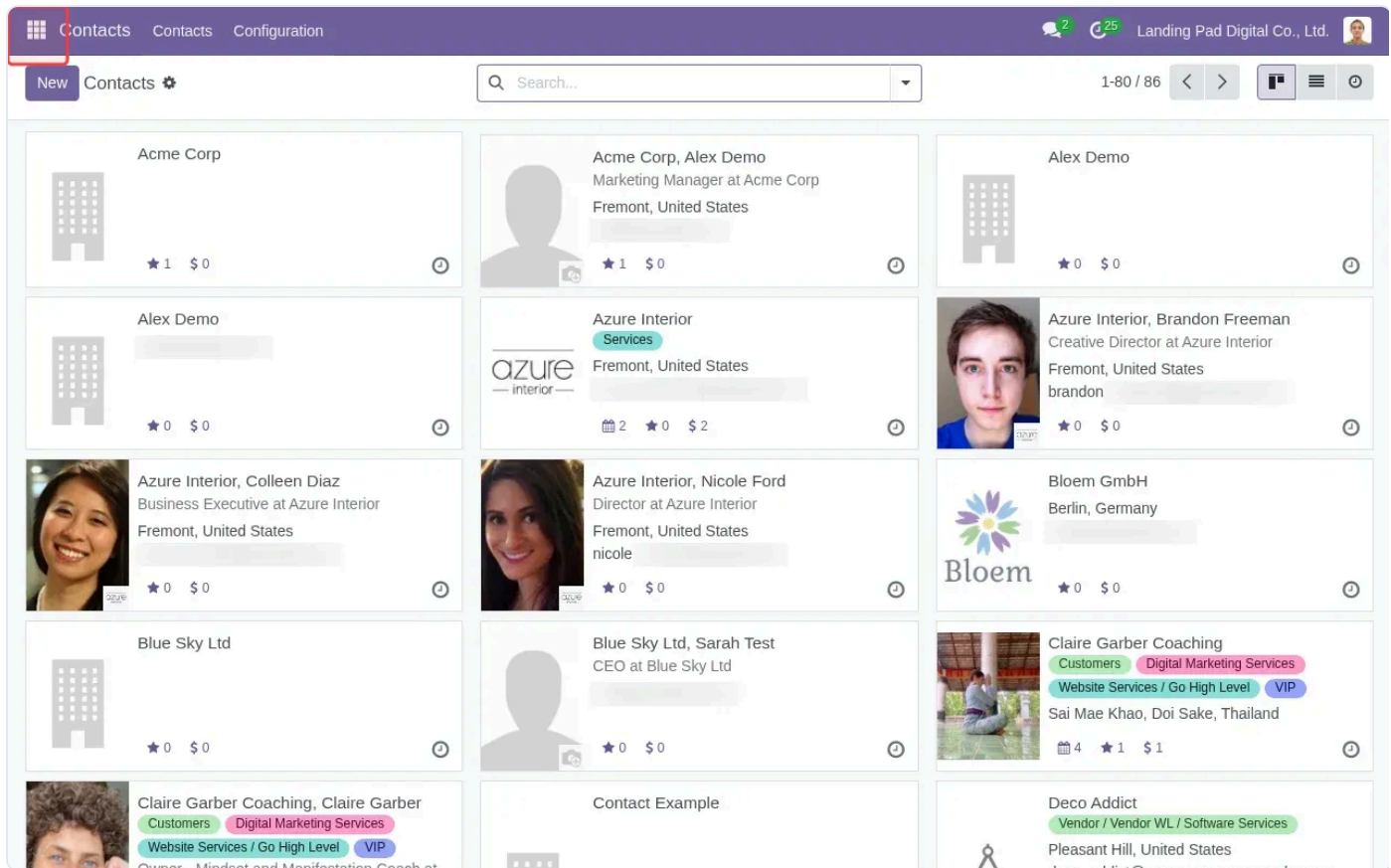


Create a new sales quotation for the customer Jane Doe

Odoo CRM 6 steps · 7m 54s

1 Click app switcher to access Sales app



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

The screenshot shows the CRM application interface. The top navigation bar includes 'Contacts', 'Configuration', and a search bar. The left sidebar contains a list of apps: Helpdesk, Discuss, Calendar, To-do, API APP, Contacts, CRM, Sales (highlighted with a red box), Dashboards, Payroll, Accounting, Project, Timesheets, Website, Email Marketing, Events, Employees, Attendances, Recruitment, and Time Off. The main content area displays a grid of contact cards for various companies, including Acme Corp, Azure Interior, Bloem GmbH, and Claire Garber Coaching. Each card shows a profile picture, name, title, location, and contact information.

3 Click 'New' button to create a quotation.

The screenshot shows the Sales application interface. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The left sidebar contains a list of apps: Sales (highlighted with a red box), Orders, To Invoice, Products, Reporting, and Configuration. The main content area displays a table of quotations. The table has columns for Number, Creation Date, Customer, Salesperson, Activities, Company, Total, and Status. The 'New' button is highlighted with a red box.

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 B	Quotation
S00006	11/02/2026 08:27:45	Azure Interior	Tata Admin Dev		Landing Pad Digital Co., Ltd.	0.00 B	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.

SalesOrdersTo InvoiceProductsReportingConfiguration

225Landing Pad Digital Co., Ltd.

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

Customer

Expiration ?13/03/2026

Quotation Template

Pricelist ?

Payment TermsImmediate

Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a productAdd a sectionAdd a noteCatalog					

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

Coupon CodeReward

Untaxed Amount:0.00 ₺

Total:0.00 ₺

5 Select 'Jane Doe' from the customer dropdown.

SalesOrdersTo InvoiceProductsReportingConfiguration

225Landing Pad Digital Co., Ltd.

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

Customer

Jane Doe

Expiration ?13/03/2026

Quotation Template

Jane Doe

msImmediate

Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Add a productAdd a sectionAdd a noteCatalog					

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

Coupon CodeReward

Untaxed Amount:0.00 ₺

Total:0.00 ₺

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

SalesOrdersTo InvoiceProductsReportingConfiguration

2

25

Landing Pad Digital Co., Ltd.

New

Quotations

New

Send by Email

Send PRO-FORMA Invoice

Confirm

Preview

Quotation

Quotation Sent

Sales Order

New

CustomerJane Doe

Expiration ?13/03/2026

Quotation Template

Pricelist ?USD Customer (USD)

Payment TermsImmediate

Order Lines

Optional Products

Other Info

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

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

Coupon Code

Reward

Untaxed Amount: \$ 0.00

Total: \$ 0.00