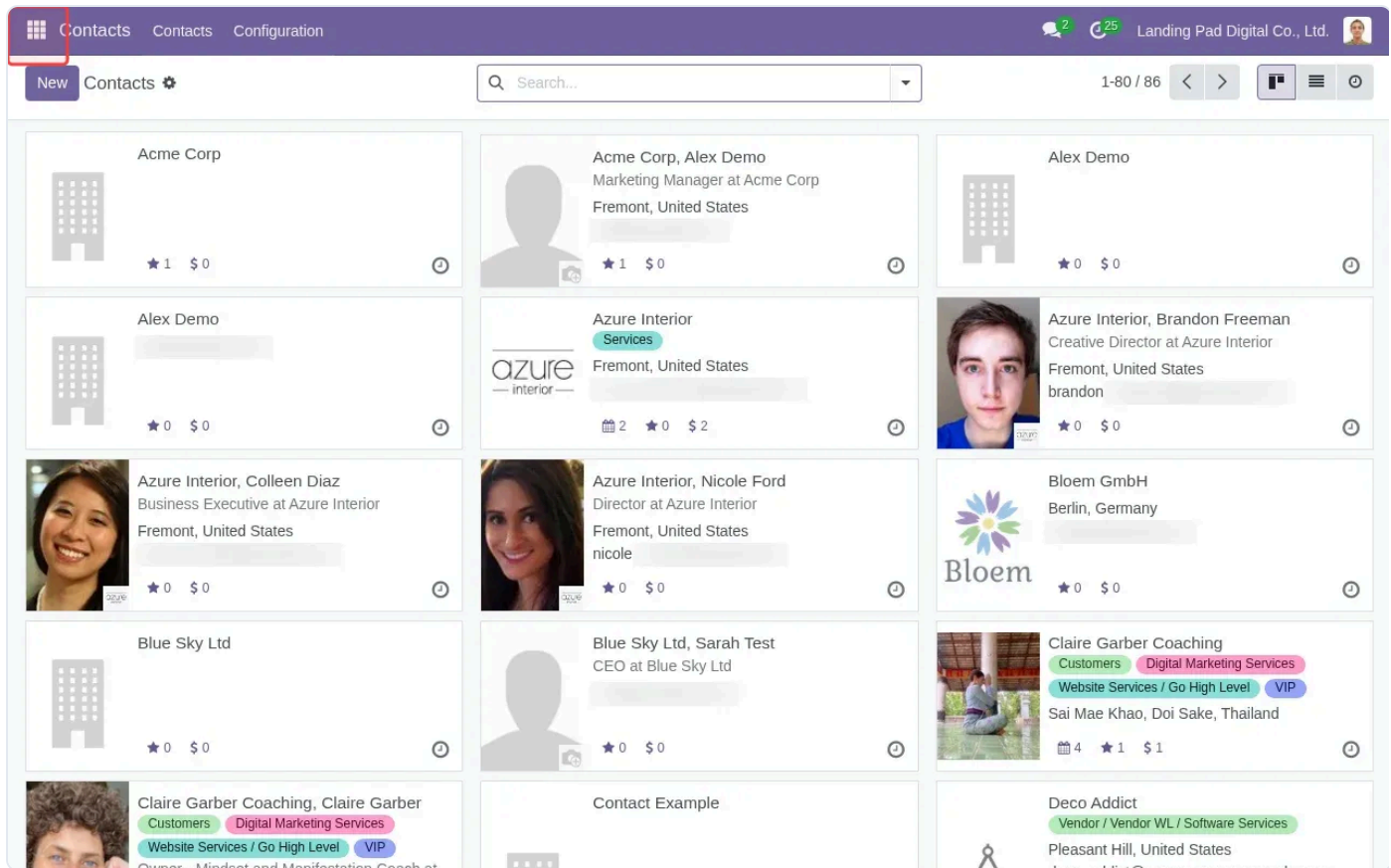


Create a new sales quotation for the customer Jane Doe

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 applications: 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 and individuals, including Acme Corp, Azure Interior, Bloem GmbH, and Claire Garber Coaching.

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 applications: Sales (highlighted with a red box), Orders, To Invoice, Products, Reporting, and Configuration. The main content area displays a table of quotations with columns: Number, Creation Date, Customer, Salesperson, Activities, Company, Total, and Status. The 'New' button is highlighted in the top left corner of the main content area.

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

Jane Doe

Create "Jane Doe"

Search More...

Create and edit...

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

Customer

Jane Doe

Quotation Template

Expiration ?

13/03/2026

Pricelist ?

USD Customer (USD)

Payment Terms

Immediate

Order Lines

Optional Products

Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
<div>Add a product</div>					
<div>Add a section</div>					
<div>Add a note</div>					
<div>Catalog</div>					

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

Coupon Code

Reward

Untaxed Amount:

\$ 0.00

Total:

\$ 0.00

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