

how to create a sales quotation for Jane Doe

Odoo CRM 11 steps · 33s

1 Type 'Jane Doe' in Type Jane Doe in the customer combobox

New Quotations

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

New

Customer Expiration ? 20/08/2026

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					

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

Coupon Code Reward

Untaxed Amount: 0.00 €

Total: 0.00 €

2 Select Jane Doe from the customer autocomplete dropdown

New Quotations

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

New

Customer Jane Doe Expiration ? 20/08/2026

Create "Jane Doe"

Create and edit...

Searching Autocomplete...

Pricelist ?

Payment Terms Immediate

Order Lines Optional Products Other Info

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Add a product Add a section Add a note Catalog					

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Coupon Code Reward

Untaxed Amount: 0.00 €

Total: 0.00 €

3 Click away from the Add a product link

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New Quotations New

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New

Customer Jane Doe → Expiration 20/08/2026
Pricelist USD Customer (USD)
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					

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

Coupon Code Reward

Untaxed Amount: \$ 0.00
Total: \$ 0.00

4 Type 'Product A' in Type product name in the search a produc

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Customer Jane Doe → Expiration 20/08/2026
Pricelist USD Customer (USD)
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Order Lines Optional Products Other Info

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Add a product Add a section Add a note Catalog					

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Coupon Code Reward

Untaxed Amount: \$ 0.00
Total: \$ 0.00

5 Click Add a product to add a product line item

SalesOrdersTo InvoiceProductsReportingConfiguration

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NewQuotationsNew🔧📎✕

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment Termsimmediate

Order Lines

Optional Products

Other Info

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

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

Coupon Code

Reward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

Send message

Log note

Activities

🔍📎👤Follow

6 Type 'Product A' in Type a product name into the Search a pr

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NewQuotationsNew🔧📎✕

Send by Email

Send PRO-FORMA invoice

Confirm

Preview

Quotation

Quotation Sent

Sales Order

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment Termsimmediate

Order Lines

Optional Products

Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Search a product	1.00		0.00		\$ 0.00
Add a productAdd a sectionAdd a noteCatalog					

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

Coupon Code

Reward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

7 Click away from the Add a product link

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NewQuotationsNew

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QuotationQuotation SentSales Order

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment TermsImmediate

Order Lines

Optional Products

Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Product A	1.00		0.00		\$ 0.00

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

8 Type 'Product B' in Type product name in the Search a produc

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NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment TermsImmediate

Order Lines

Optional Products

Other Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Product A	1.00		0.00		\$ 0.00

Add a product

Add a section

Add a note

Catalog

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Coupon Code

Reward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

Send message

Log note

Activities

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9 Click away from the Add a product link

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Order LinesOptional ProductsOther Info

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

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Coupon CodeReward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

10 Click the 'Add a product' button to add a new product line

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreviewQuotationQuotation SentSales Order

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Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Product A	1.00		0.00		\$ 0.00
Add a product					
Add a section					
Add a note					
Catalog					

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

Coupon CodeReward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

11 Type 'Product B' in Type a product name into the Search a pr

SalesOrdersTo InvoiceProductsReportingConfiguration

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QuotationsNew

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New

CustomerJane Doe

Expiration20/08/2026

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Add a productAdd a sectionAdd a noteCatalog

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