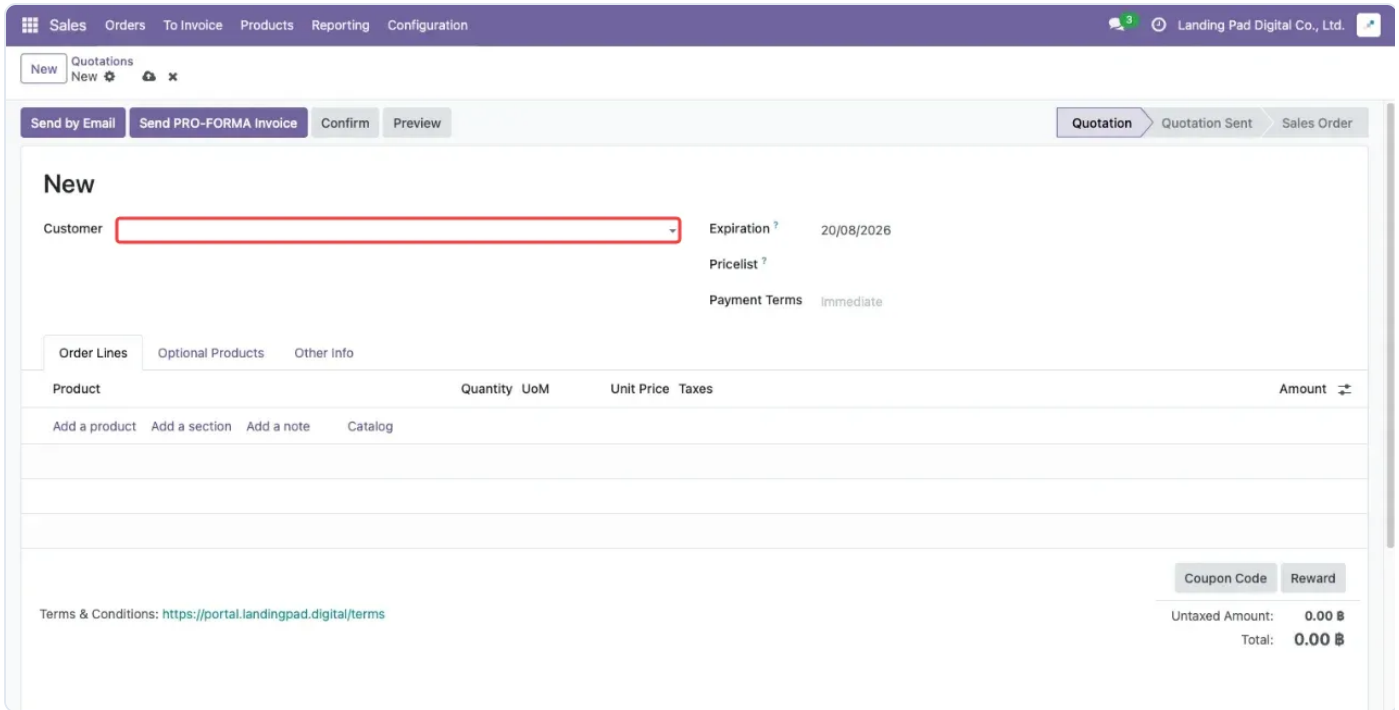


how to create a sales quotation for Jane Doe

Odoo CRM 11 steps · 33s

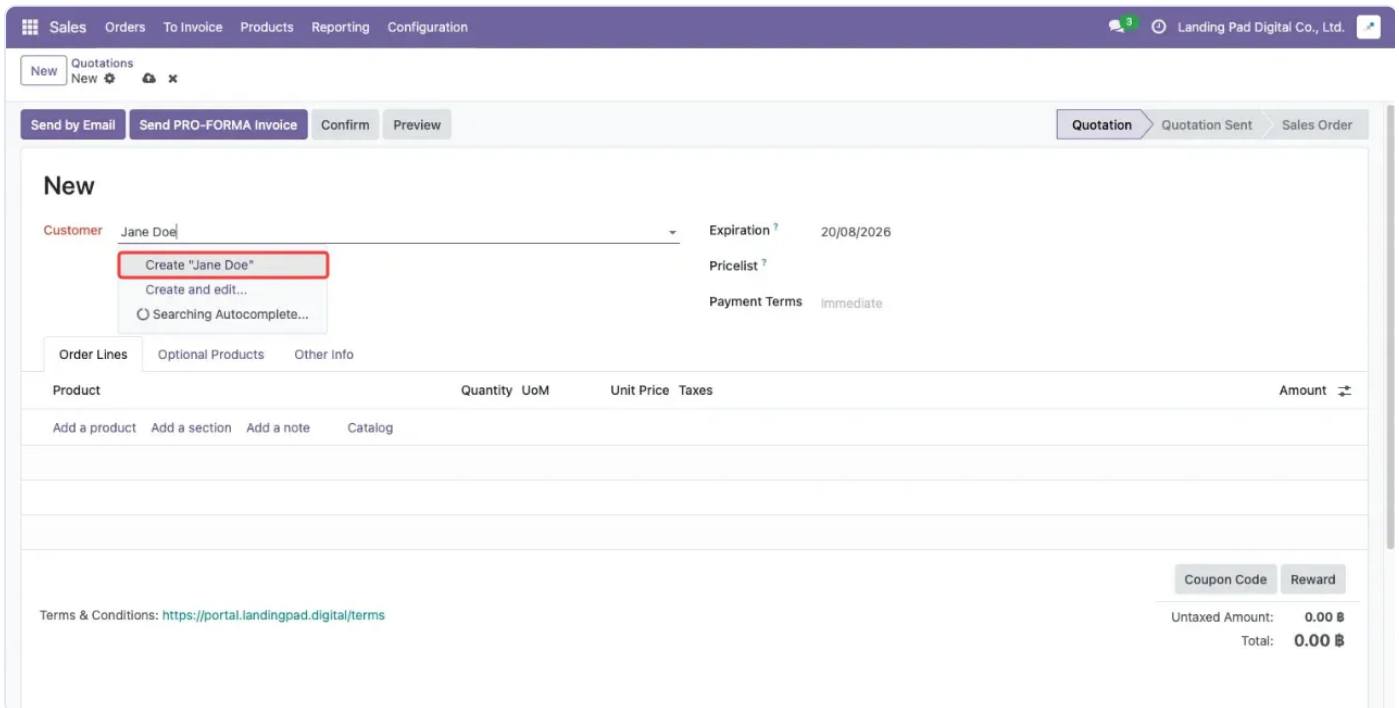
1 Type 'Jane Doe' in Type Jane Doe in the customer combobox



The screenshot shows the 'New Quotation' form in Odoo CRM. The 'Customer' field is highlighted with a red border. The form includes the following fields and sections:

- Customer:** A dropdown menu with a red border.
- Expiration:** 20/08/2026
- Pricelist:** (Empty)
- Payment Terms:** Immediate
- Order Lines:** A table with columns: Product, Quantity, UoM, Unit Price, Taxes, Amount. It includes buttons: 'Add a product', 'Add a section', 'Add a note', and 'Catalog'.
- Terms & Conditions:** <https://portal.landingpad.digital/terms>
- Summary:**
 - Coupon Code: (Empty)
 - Reward: (Empty)
 - Untaxed Amount: 0.00 €
 - Total: 0.00 €

2 Select Jane Doe from the customer autocomplete dropdown



The screenshot shows the 'New Quotation' form in Odoo CRM. The 'Customer' field now displays 'Jane Doe' and a dropdown menu is open, highlighting 'Create "Jane Doe"'. The form includes the following fields and sections:

- Customer:** Jane Doe (with a dropdown menu open showing options: 'Create "Jane Doe"', 'Create and edit...', and 'Searching Autocomplete...').
- Expiration:** 20/08/2026
- Pricelist:** (Empty)
- Payment Terms:** Immediate
- Order Lines:** A table with columns: Product, Quantity, UoM, Unit Price, Taxes, Amount. It includes buttons: 'Add a product', 'Add a section', 'Add a note', and 'Catalog'.
- Terms & Conditions:** <https://portal.landingpad.digital/terms>
- Summary:**
 - Coupon Code: (Empty)
 - Reward: (Empty)
 - Untaxed Amount: 0.00 €
 - Total: 0.00 €

3 Click away from the Add a product link

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsNew

Landing Pad Digital Co., Ltd.

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

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

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

SalesOrdersTo InvoiceProductsReportingConfiguration

NewQuotationsNew

Landing Pad Digital Co., Ltd.

Send by EmailSend PRO-FORMA InvoiceConfirmPreview

QuotationQuotation SentSales Order

New

CustomerJane Doe→Expiration ?20/08/2026
Pricelist ?USD Customer (USD)
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 Click Add a product to add a product line item

SalesOrdersTo InvoiceProductsReportingConfiguration

3Landing Pad Digital Co., Ltd.

NewQuotationsNew

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment Termsimmediate

Order LinesOptional ProductsOther 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 CodeReward

Untaxed Amount: \$ 0.00

Total: \$ 0.00

Send messageLog noteActivities

Follow

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

SalesOrdersTo InvoiceProductsReportingConfiguration

3Landing Pad Digital Co., Ltd.

NewQuotationsNew

New

CustomerJane Doe

Expiration?20/08/2026

Pricelist?USD Customer (USD)

Payment Termsimmediate

Order LinesOptional ProductsOther Info

Product	Quantity	UoM	Unit Price	Taxes	Amount
Search a product	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

Send by EmailSend PRO-FORMA invoiceConfirmPreview

QuotationQuotation SentSales Order

7 Click away from the Add a product link

SalesOrdersTo InvoiceProductsReportingConfiguration

New

QuotationsNew

Send by Email

Send PRO-FORMA Invoice

Confirm

Preview

Quotation

Quotation Sent

Sales Order

New

CustomerJane Doe

Expiration20/08/2026

PricelistUSD 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

SalesOrdersTo InvoiceProductsReportingConfiguration

New

QuotationsNew

Send by Email

Send PRO-FORMA Invoice

Confirm

Preview

Quotation

Quotation Sent

Sales Order

New

CustomerJane Doe

Expiration20/08/2026

PricelistUSD 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

Send message

Log note

Activities

Follow

9 Click away from the Add a product link

SalesOrdersTo InvoiceProductsReportingConfiguration

3Landing Pad Digital Co., Ltd.

NewQuotationsNewNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreviewQuotation SentSales Order

New

CustomerJane DoeExpiration[?]20/08/2026Pricelist[?]USD Customer (USD)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: \$ 0.00Total: \$ 0.00

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

SalesOrdersTo InvoiceProductsReportingConfiguration

3Landing Pad Digital Co., Ltd.

NewQuotationsNewNew

Send by EmailSend PRO-FORMA InvoiceConfirmPreviewQuotationQuotation SentSales Order

New

CustomerJane DoeExpiration[?]20/08/2026Pricelist[?]USD Customer (USD)Payment TermsImmediate

Order LinesOptional ProductsOther Info

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

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

Coupon CodeReward

Untaxed Amount: \$ 0.00Total: \$ 0.00

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

SalesOrdersTo InvoiceProductsReportingConfiguration

New

Quotations

New

Landing Pad Digital Co., Ltd.

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

Coupon Code

Reward

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

Untaxed Amount: \$ 0.00

Total: \$ 0.00

Send message

Log note

Activities

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