**Exercise 1: Creating a new customer in Odoo**

1. **Login to Odoo:**
   * Open your web browser and navigate to your Odoo instance.
   * Enter your credentials to log in.
2. **Access the Sales Module:**
   * Once logged in, locate the main menu on the left side or the dashboard, and find the "Sales" module. Click on it to access the sales-related functionalities.
3. **Navigate to Customers:**
   * Within the Sales module, look for a submenu or menu item named "Customers,". Click on it to go to the Customers section.
4. **Create a New Customer:**
   * In the Customers section, you should find a button labeled "Create" or "New." Click on this button to initiate the customer creation process.
5. **Fill in Customer Details:**
   * A new form will appear for entering customer details. Provide the necessary information:
     + **Customer Name:** Enter the name of the customer.
     + **Address:** Input the customer's address details.
     + **Contact Information:** Include phone number, email, and other relevant contact details.
     + **Billing Information:** Enter the Invoice Address and Delivery Address.
6. **Save the Customer:**
   * After entering the customer details, look for a "Save" button on the form. Click on it to save the new customer.
7. **Review and Edit (Optional):**
   * If you need to review or edit the customer information, you can navigate back to the customer details page. This can be done by going to the list of customers, finding the newly created customer, and clicking on its name to view and edit details.
8. **Confirmation (Optional):**
   * Depending on your Odoo configuration, you may encounter a confirmation step. This could involve confirming the creation of the customer by clicking on a "Confirm" button.
9. **View the Customer List:**
   * Return to the list of customers within the Customers section to verify that the new customer has been added successfully.

**Exercise 2: Creating a new quotation**

1. **Login to Odoo:**
   * Open your web browser and navigate to your Odoo instance.
   * Enter your credentials to log in.
2. **Access the Sales Module:**
   * Locate the main menu or dashboard, and click on the "Sales" module. This module is where you handle sales-related activities, including quotations.
3. **Navigate to Quotations:**
   * Within the Sales module, look for a submenu or menu item titled "Quotations," "Sales Orders," or a similar option. Click on it to access the Quotations section.
4. **Create a New Quotation:**
   * Once in the Quotations section, click on the "Create" or "New" button to initiate the creation of a new quotation.
5. **Select Customer:**
   * In the new quotation form, start by selecting the customer for whom you're creating the quotation. If the customer is not in the system, you can create a new customer at this point by clicking on the "Create and Edit" button or a similar option.
6. **Add Products:**
   * Scroll down to the "Order Lines" section or a similar section where you can add products to the quotation. You can either select existing products from your product list or create new ones on the fly. Enter the quantity and unit price for each product.
7. **Set Quantity and Price:**
   * For each product added to the quotation, set the quantity and unit price. Odoo will automatically calculate the subtotal for each line item and the total amount for the entire quotation.
8. **Additional Information:**
   * Fill in any additional information relevant to the quotation. This might include payment terms, delivery details, or any custom fields your organization has configured.
9. **Save the Quotation:**
   * Click on the "Save" button or a similar option to save the quotation. Some versions of Odoo may have a "Confirm Order" button instead.
10. **Review and Edit (Optional):**
    * If necessary, you can review or edit the quotation by going back to the Quotations section. Locate the quotation in the list and click on its name to access the details.
11. **Send the Quotation:**
    * Odoo allows you to send quotations directly from the system. Find an option like "Send by Email" or "Send Quotation" and follow the prompts to email the quotation to the customer.
12. **Convert to a Sales Order (Optional):**
    * If the customer accepts the quotation, you may need to convert it into a sales order. Look for an option like "Confirm Sale" or "Convert to Sales Order," depending on your configuration.

**Exercise 3: Creating a sales order from a previous quotation**

1. **Login to Odoo:**
   * Open your web browser and navigate to your Odoo instance.
   * Log in with your credentials.
2. **Access the Sales Module:**
   * Locate the main menu or dashboard and click on the "Sales" module to access sales-related functionalities.
3. **Navigate to Quotations:**
   * Within the Sales module, find a submenu or menu item titled "Quotations," "Sales Orders," or a similar option. Click on it to go to the Quotations section.
4. **Locate the Quotation:**
   * In the Quotations section, find the quotation that you want to convert into a sales order. Click on the name or reference number of the quotation to view its details.
5. **Convert to Sales Order:**
   * Look for an option such as "Convert to Sales Order" or "Confirm Sale" on the quotation page. This action initiates the conversion process.
6. **Verify Customer Information:**
   * The system should automatically populate the customer information from the quotation. Verify that the customer details are correct, and make any necessary adjustments if the information has changed.
7. **Review Product Details:**
   * Check the product details on the sales order. Ensure that the quantities, prices, and any other product-related information match your expectations. Make adjustments if needed.
8. **Add or Remove Products (Optional):**
   * If there are changes to the order, you can add or remove products at this stage. Odoo typically allows you to modify the order lines directly on the sales order.
9. **Adjust Additional Information:**
   * Review and adjust any additional information on the sales order, such as delivery terms, payment terms, or custom fields.
10. **Save the Sales Order:**
    * Click on the "Save" or "Confirm Order" button to save the sales order. This step finalizes the conversion from the quotation to a sales order.
11. **Review the Sales Order:**
    * Navigate to the Sales Orders section within the Sales module. Locate the newly created sales order and click on its name to review the details.
12. **Send the Sales Order (Optional):**
    * If applicable, you can send the sales order to the customer directly from Odoo. Look for options like "Send by Email" or "Send Sales Order" and follow the prompts.
13. **Additional Steps (Optional):**
    * Depending on your business process and configuration, you may need to take additional steps such as generating an invoice, processing the order, or managing the delivery. Follow your organization's specific workflows.