

How to link terms and conditions to a quotation?

[Configuration](#)

[General terms and conditions](#)

[Information on the product](#)

[Quotation and sales terms](#)

Overview

Specifying Terms and conditions is essential to ensure the good relationships between customer and seller. Every seller has to declare all the formal information which includes products and company policy so customer can read all those terms before committing to anything.

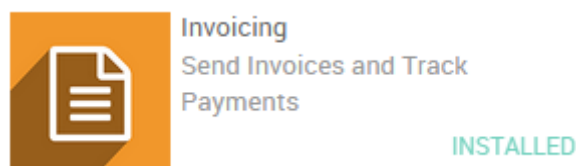
Thanks to Odoo you can easily include your default terms and conditions on every quotation, sales order and invoice. Moreover you can also include specific information regarding any products.

Let's take the following example: Your company sells water bottles to restaurants and you would like to add the following standard terms and conditions on all your quotations:

- *Payment is 30 days net upon delivery. Safe storage of the products of MyCompany is necessary in order to ensure their quality, MyCompany will not be held accountable in case of unsafe storage of the products.*

Configuration

No special configuration is needed to be able to add your terms and conditions. It is however necessary to install the invoice application to have the possibility of sending out invoices. To do so go into the app module and install the invoicing application.



General terms and conditions

General terms and conditions can be specified in the company data. They will then automatically appear on every sales document from the quotation to the invoice.

To specify your Terms and Conditions go into the settings module > general settings > Configure your company data (see picture below).

General Settings

You will find more options in your company details: address for the header and footer, overdue payments texts, etc.

[Configure your company data](#)

In this new window you will be able to specify our general terms and conditions by editing the page and going in the configuration windows (see picture below).

General Settings / YourCompany

SAVE

DISCARD

1 / 1 < >

Company Name

YourCompany

Company Tagline

My Company Tagline

GENERAL INFORMATION

CONFIGURATION

REPORT CONFIGURATION

OVERDUE PAYMENTS

OVERDUE PAYMENTS

Accounting

Currency

USD

Use anglo-saxon accounting

☒

Logistics

US Check Printing

Check Layout

Check on top

Multi-Pages Check Stub

☐

Top Margin

0.25

in

Left Margin

0.00

in

Sales

Payment is 30 days net upon delivery. Safe storage of the products of MyCompany is necessary in order to ensure their quality, MyCompany will not be held accountable in case of unsafe storage of the products.

Information on the product

It is also possible to add specific information / regarding a product on the quotation. To add information regarding the water bottle in your quotation, go into your **sales module > sales > products**.

Select or create your waterbottle in the products. Click on your product, then click the edit button

If you then go into the notes widget you will have the possibility to specify your description necessary for the quotation (see picture below).

Product Name

2L Evian

☒ Can be Sold
☐ Event Subscription
☐ Can be expensed
☒ Can be Purchased
☐ Use eBay

GENERAL INFORMATION INVENTORY SALES ACCOUNTING **NOTES**

Description for Quotations

2L Evian, pure fresh water

Quotation and sales terms

After saving you will see appear your terms and conditions will appear on your quotations.



Great Product for Great People

YourCompany
1725 Slough Ave.
Scranton PA 18540
United States

Invoicing and shipping address:

Agrolait
69 rue de Namur
1300 Wavre
Belgium
☎ +32 10 588 558

Agrolait
69 rue de Namur
1300 Wavre
Belgium

Quotation # SO052

Quotation Date:
10/06/2015 02:00:00

Salesperson:
Administrator

Payment Term:
30 Net Days

Expiration Date:
11/05/2015

Description	Quantity	Unit Price	Taxes	Price
2L Evian, pure fresh water	1.0 Unit(s)	0.0	VAT for EU Services to Belgium	0.00 .J
Total Without Taxes				0.00 .J
Taxes				0.00 .J
Total				0.00 .J

Payment is 30 days net upon delivery. Safe storage of the products of MyCompany is necessary in order to ensure their quality, MyCompany will not be held accountable in case of unsafe storage of the products

Payment term: 30 Net Days