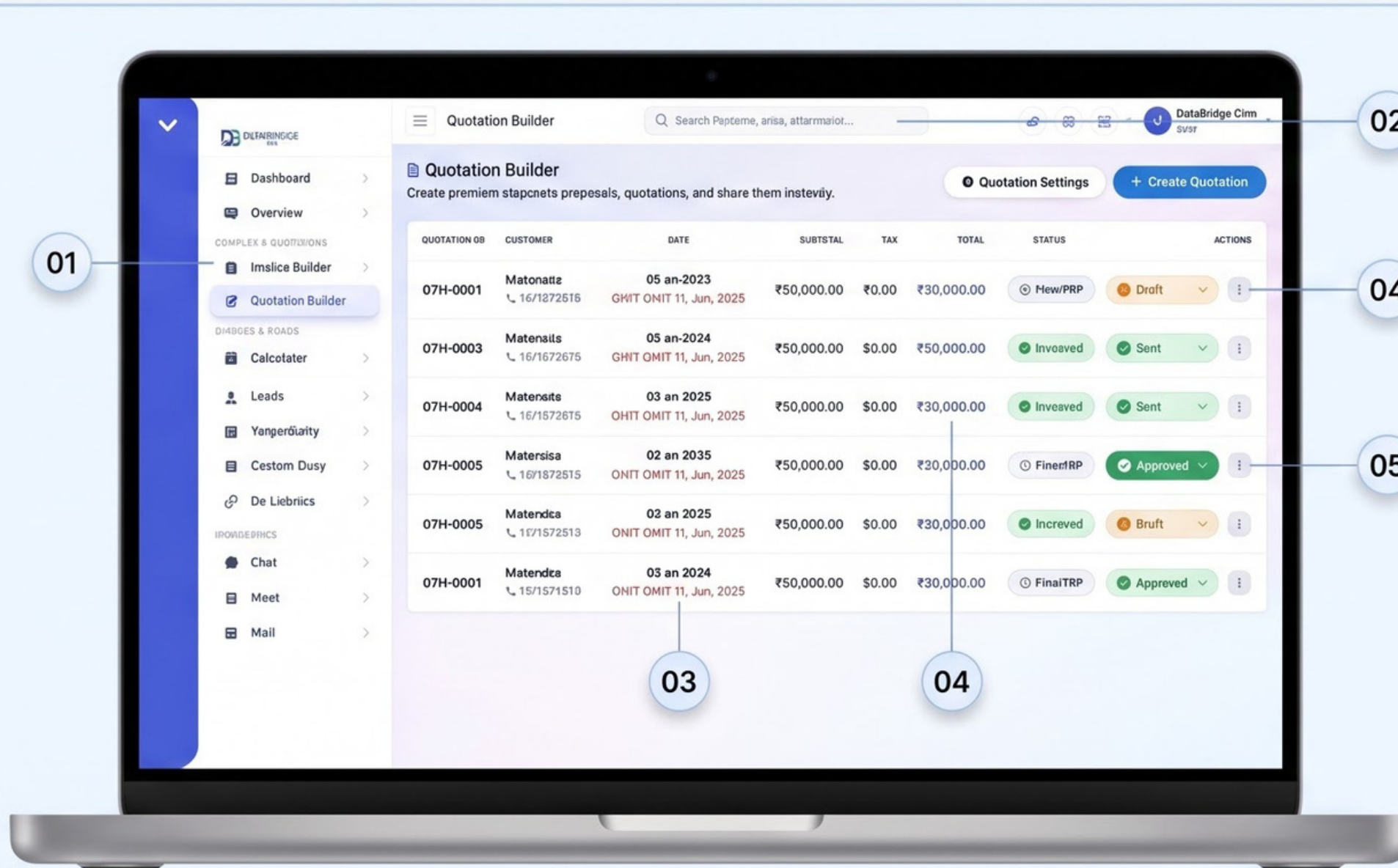


Quotation Builder – Complete Overview



QUOTATION BUILDER

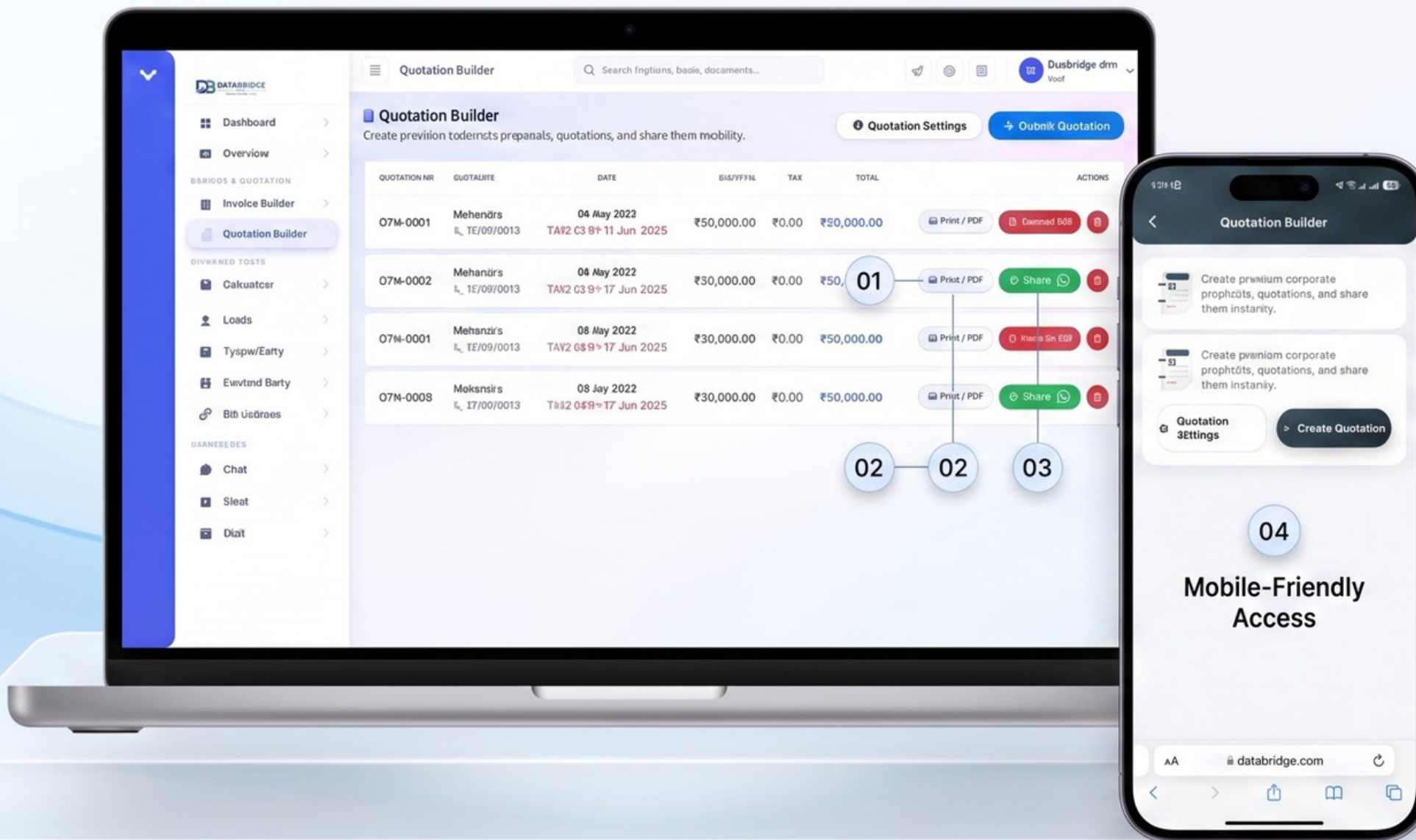
Manage every quotation from one centralized workspace.

- 01 — Centralized Quotations:** View all created quotations from one dashboard.
- 02 — Quick Search:** Find quotations instantly using the search option.
- 03 — Customer & Date Tracking:** See customer name, quotation number and quotation date.
- 04 — Amount Visibility:** Check the total quotation value directly from the listing.
- 05 — Status & Actions:** Monitor quotation status and access available quotation actions.

CREATE QUOTATION → MANAGE DETAILS → TRACK STATUS → SHARE / DOWNLOAD

DATABRIDGE CRM

Quotation Actions



QUOTATION ACTIONS

Download, share and manage quotations in seconds.

01

— PDF Download

Generate quotation files in PDF format.

02

— WhatsApp Sharing

Send quotations instantly to customers.

03

— Quick Actions

Perform actions directly from the listing.

04

— Mobile Access

Use the quotation system smoothly on mobile.

📄 CREATE QUOTATION → 📄 DOWNLOAD PDF → 🗨️ SHARE ON WHATSAPP → 📱 ACCESS ON MOBILE

Create Quotation

Customer & Quote Details

Headline

CREATE QUOTATION

Subheadline

Start every quotation with accurate customer and quote information.

01 — Customer Details Header

03 — Quotation Items / Products Header

03 — Smart Form Layout

04 — Better Accuracy

05 — Fast Setup



SELECT CUSTOMER



ENTER QUOTATION DETAILS



VERIFY FORM INFORMATION



PROCEED TO ITEM ENTRY

DATABRIDGE CRM

Create Quotation

Products, GST & Final Total

The screenshot shows the 'Create Quotation' page in the Databridge CRM. It features a sidebar with a 'Create Quotation' link and a main content area. The main area is divided into several sections: 'Customer Details' (01), 'Quotation Items / Products' (02), 'Notes / Times (Optional)' (03), 'Subtotal' (04), 'Tax Amount (GST)' (05), 'Pak Discount (T)' (06), and 'Grand Total' (07). The 'Customer Details' section includes fields for Customer Name, Customer Email, Customer Phone, and Customer Address. The 'Quotation Items / Products' section has a table with columns for Product Name, Qty, Price, and Total. The 'Subtotal' section shows a value of ₹0.00. The 'Tax Amount (GST)' section shows a value of ₹0.00. The 'Pak Discount (T)' section shows a value of ₹0.00. The 'Grand Total' section shows a value of ₹0.00. The 'Notes / Times (Optional)' section has a text area for notes. The 'Create Quotation' button is located at the bottom right of the main content area.

PRODUCTS & BILLING

Add items, calculate GST and finalize your quotation value.

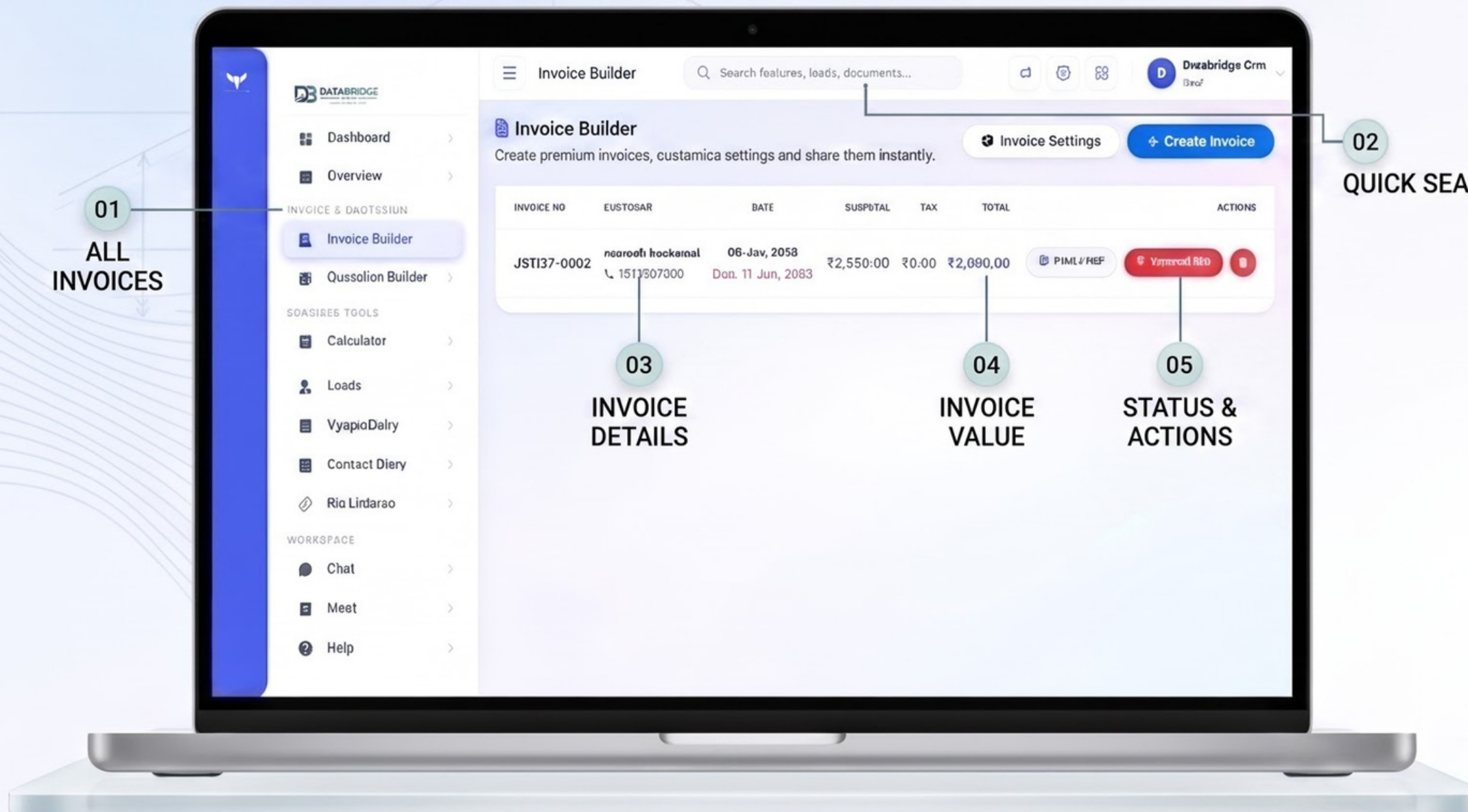
- 01 — Add Products / Services
- 02 — Quantity & Pricing
- 03 — GST / Tax Calculation
- 04 — Automatic Amount Calculation
- 05 — Final Quotation Total

$$\text{ITEM PRICE} \times \text{QUANTITY} + \text{GST / TAX} = \text{FINAL TOTAL}$$

+ ADD ITEM → SET QUANTITY → ENTER PRICE → APPLY GST → REVIEW TOTAL

Invoice Builder | Complete Overview

INVOICE CONTROL • VIEW • SEARCH • TRACK • MANAGE ⚙️



INVOICE MANAGEMENT

EVERY INVOICE. ONE DASHBOARD.

Track, manage and access billing records from a centralized invoice workspace.

01 – Centralized Invoice Records

02 – Quick Invoice Search

03 – Customer & Invoice Details

04 – Amount Tracking

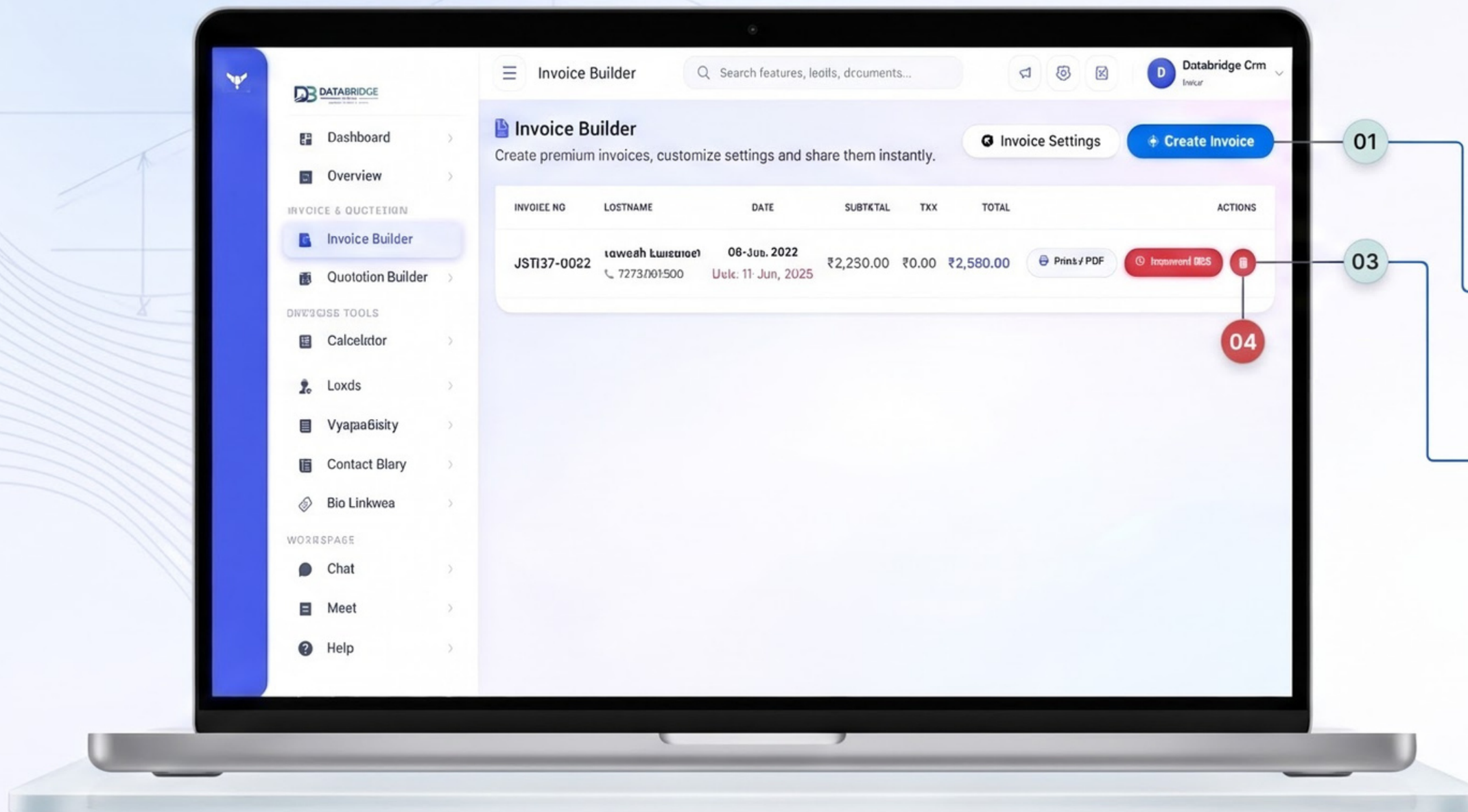
05 – Status & Actions



CREATE INVOICE → TRACK DETAILS → REVIEW STATUS → MANAGE / SHARE

Invoice Actions

Print, Share & Manage

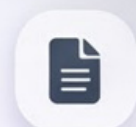
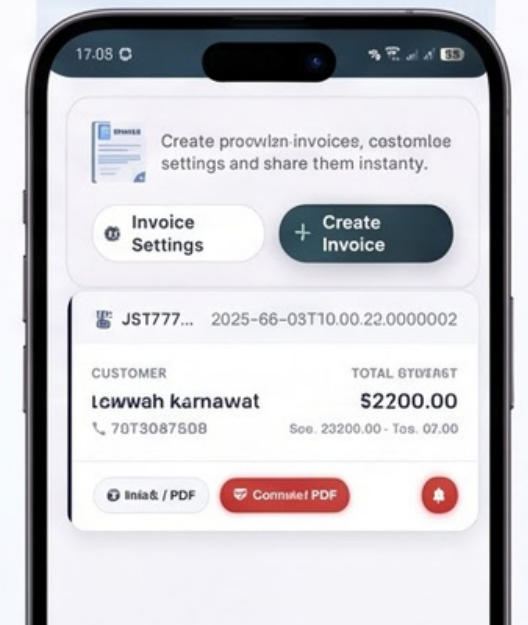


MANAGE EVERY INVOICE IN A FEW CLICKS

Access important invoice controls directly from the Invoice Builder workspace.

- 01 – Quick Invoice Actions**
Create premium invoices, customizing and share them instantly.
- 02 – Print / Document Access**
Print / document : detailed documentation and status.
- 03 – Easy Sharing**
Easy printable invoice and sharllows and sharing.
- 04 – Mobile-Friendly Management**
Management in list or details users via WhatsApp.

MOBILE ACCESS



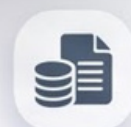
OPEN INVOICE



REVIEW DETAILS



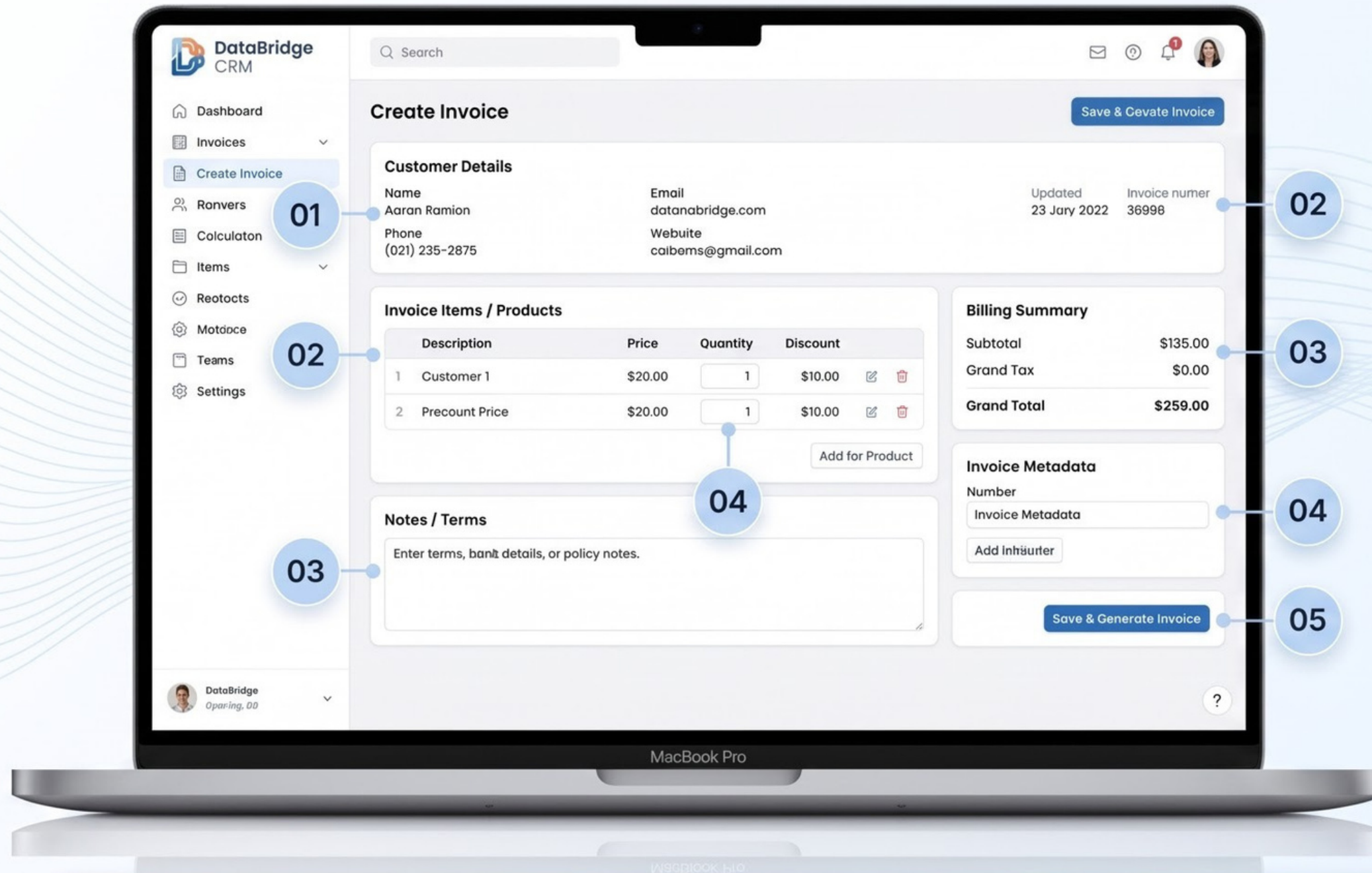
PRINT / SHARE



MANAGE RECORDS

FROM CUSTOMER TO COMPLETE INVOICE

Enter customer information, add billing items and include important notes within a single structured invoice workflow.



Create Invoice

Customer Details

Name: Aaran Ramion
Email: datanabridge.com
Phone: (021) 235-2875
Webuite: calbems@gmail.com

Updated: 23 July 2022
Invoice number: 36998

Invoice Items / Products

Description	Price	Quantity	Discount
1 Customer 1	\$20.00	1	\$10.00
2 Precount Price	\$20.00	1	\$10.00

Billing Summary

Subtotal: \$135.00
Grand Tax: \$0.00
Grand Total: \$259.00

Invoice Metadata

Number:
Invoice Metadata:
Add Inhaurter

Notes / Terms

Enter terms, bank details, or policy notes.

Save & Generate Invoice

01 — Customer Details

02 — Invoice Information

03 — Add Products / Services

04 — Quantity & Pricing

05 — Notes & Supporting Details

Create Invoice

Customer Details

Name: datanabridge.com
Phone: (223) 236-3678

CUSTOMER INFORMATION

Invoice Items / Products

Product	Price	Quantity
Prossuont 1	\$30.00	1
Product rvi aex		

ITEM & NOTES SECTION

SELECT CUSTOMER → ENTER INVOICE DETAILS → ADD ITEMS → ADD NOTES → REVIEW

INVOICE BILLING SUMMARY — REVIEW & GENERATE

Dashboard

Invoices

Create Invoice

Benvers

Calculation

Items

Restocks

Mattiacs

Terms

Settings

Create Invoice

Customer Details

Name

Aahen Kainion

Email

dotamobridge.com

Phone

(831) 534-2676

Webibos

curtzamris@gmail.com

Updated

23 July 2023

Invoice number

39966

Save & Generate Invoice

Invoice Items / Products

Description	Price	Quantity	Discount		
1 Customer 1	\$30.00	1	\$10.00		
2 Preeeure Price	\$30.00	1	\$10.00		

Add for Product

Notes / Terms

Enter terms, bank details, or pality notes.

Billing Summary

Subtotal

\$128.00

Grand Tax

\$0.00

Grand Total

\$256.60

Invoice Metadata

Number

Invoice Metadata

Add feNiorrer

Save & Generate Invoice

FINAL BILLING

REVIEW THE NUMBERS. GENERATE THE INVOICE.

Verify invoice details, billing values and the final amount before generating the completed invoice.

01 INVOICE INFO

02 BILLING SUMMARY

03 GST / TAX

04 FINAL TOTAL

05 GENERATE INVOICE

Billing Summary

Subtotal	\$128.00
Grand Tax	\$0.00
Grand Tax	\$0.00
Grand Total	\$256.60

FOCUS ZOOM

01 — Invoice Metadata

02 — Billing Summary

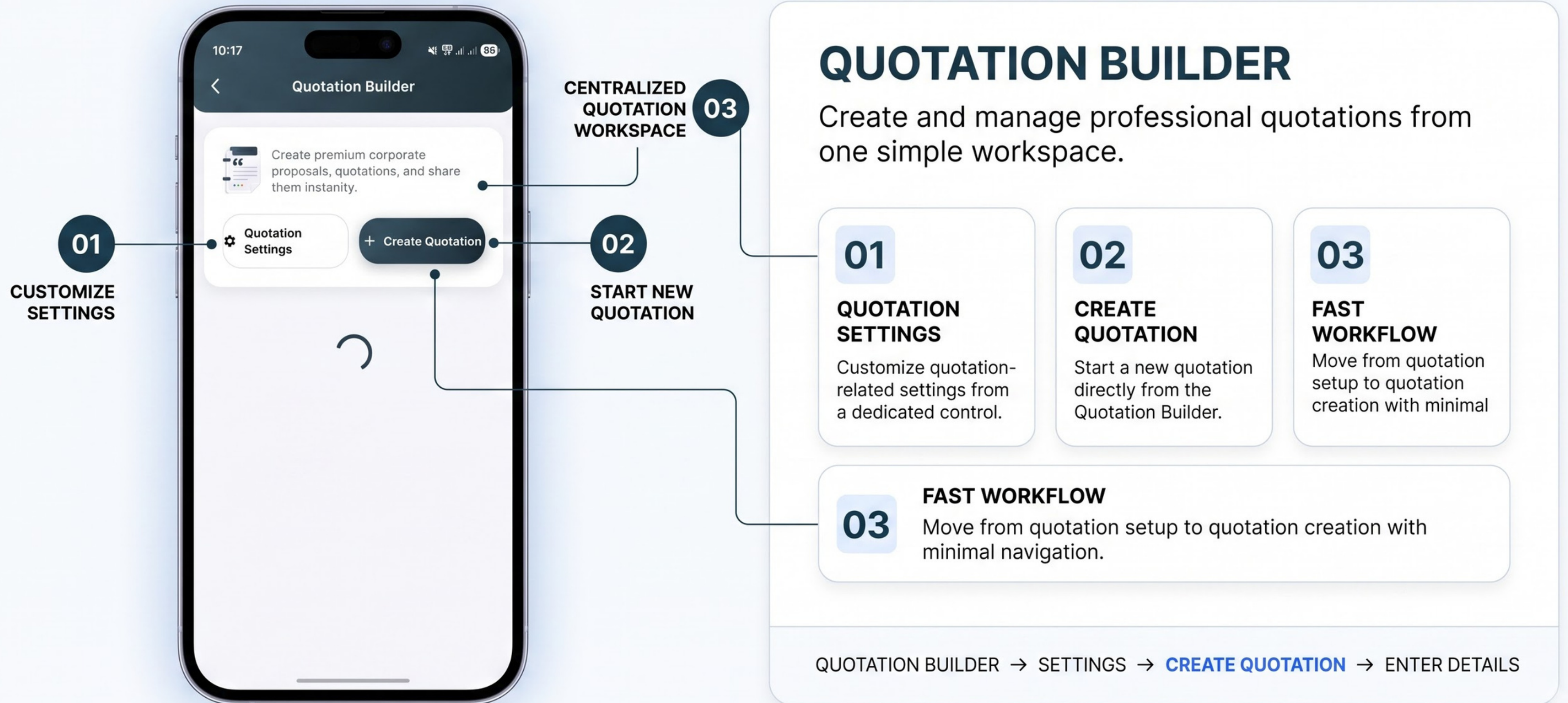
03 — Tax / GST Review

04 — Final Invoice Total

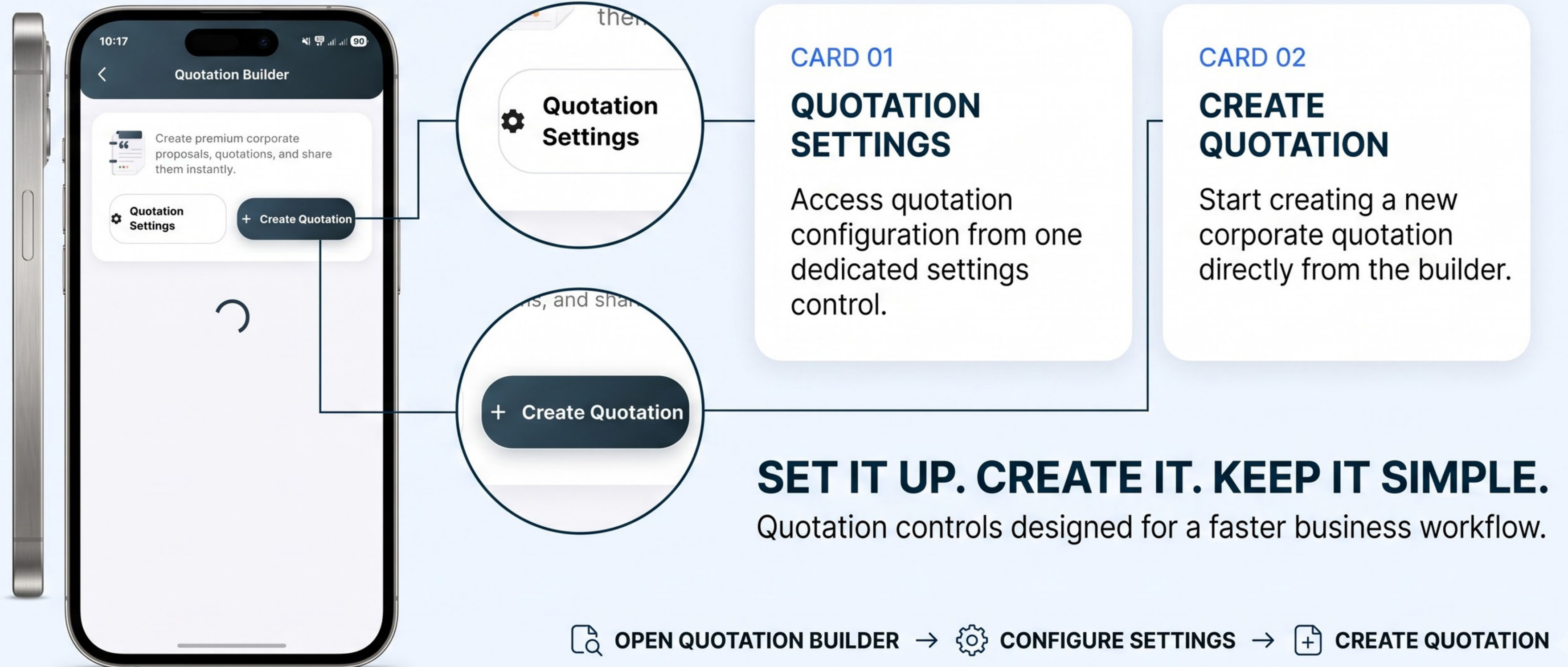
05 — Generate Invoice

 CUSTOMER DETAILS →  ADD ITEMS →  REVIEW BILLING →  VERIFY TOTAL →  GENERATE INVOICE

QUOTATION BUILDER — COMPLETE OVERVIEW



QUOTATION SETTINGS & QUICK CREATE



10:17 60

< Create Custom Quotation

Fill in the details to generate a new corporate quotation.

Customer Details

Customer Name
Enter customer name **01**

Customer Email
Enter customer email **02**

Customer Phone
Enter phone number **03**

Customer Address
Enter customer address **04**

Quotation Details

Quotation Number
QTN-0001

START WITH THE CUSTOMER

Capture the essential customer information before preparing the quotation.

01 — CUSTOMER NAME

Record the customer or business name.

02 — EMAIL

Add the customer email for quotation communication.

03 — PHONE

Store direct customer contact information.

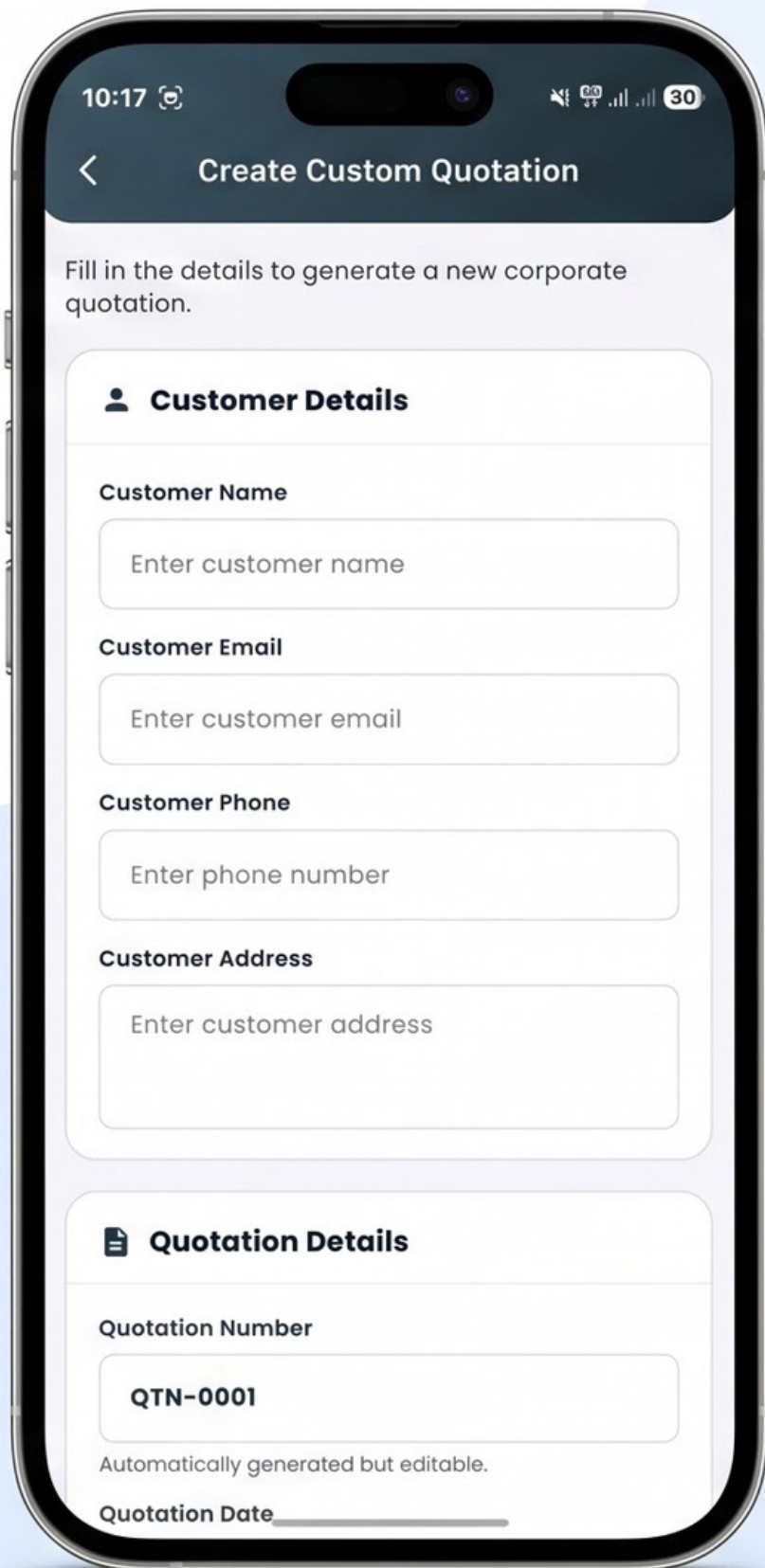
04 — ADDRESS

Add the customer's billing or communication address.

**ALL CUSTOMER INFORMATION.
ONE STRUCTURED FORM.**

CUSTOMER NAME → EMAIL → PHONE → ADDRESS → QUOTATION DETAILS

QUOTATION DETAILS – SMART NUMBERING & DATE



10:17  30

< Create Custom Quotation

Fill in the details to generate a new corporate quotation.

Customer Details

Customer Name
Enter customer name

Customer Email
Enter customer email

Customer Phone
Enter phone number

Customer Address
Enter customer address

Quotation Details

Quotation Number
QTN-0001
Automatically generated but editable.

Quotation Date

Quotation Details

Quotation Number

QTN-0001

Automatically generated but editable.

Quotation Date

01

**AUTO-GENERATED
NUMBER**

02

**EDITABLE WHEN
REQUIRED**

03

DATE CONTROL

AUTO-GENERATED QUOTATION NUMBER:

The CRM prepares a quotation reference number automatically.

EDITABLE REFERENCE:

The quotation number can be edited where required.

QUOTATION DATE:

Maintain the relevant quotation date within the same workflow.

**LESS MANUAL SETUP.
MORE CONSISTENT QUOTATIONS.**

CUSTOMER DETAILS → AUTO NUMBER → QUOTATION DATE → CONTINUE QUOTATION