



Evavo Quotation Cloud — User Guide

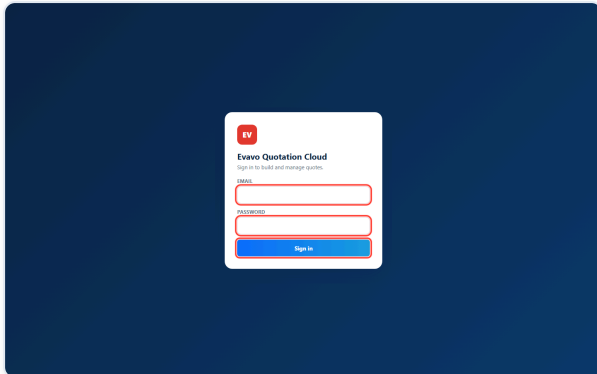
How to create and send a quote

- 1 Sign in
- 2 Dashboard → New Quote
- 3 Customer details
- 4 Add products
- 5 Check qty / charges
- 6 Save quote
- 7 Preview → send (PDF / Email / WhatsApp)

REQUIRED must be filled to save a quote · **RECOMMENDED** optional, but needed to email/WhatsApp the quote

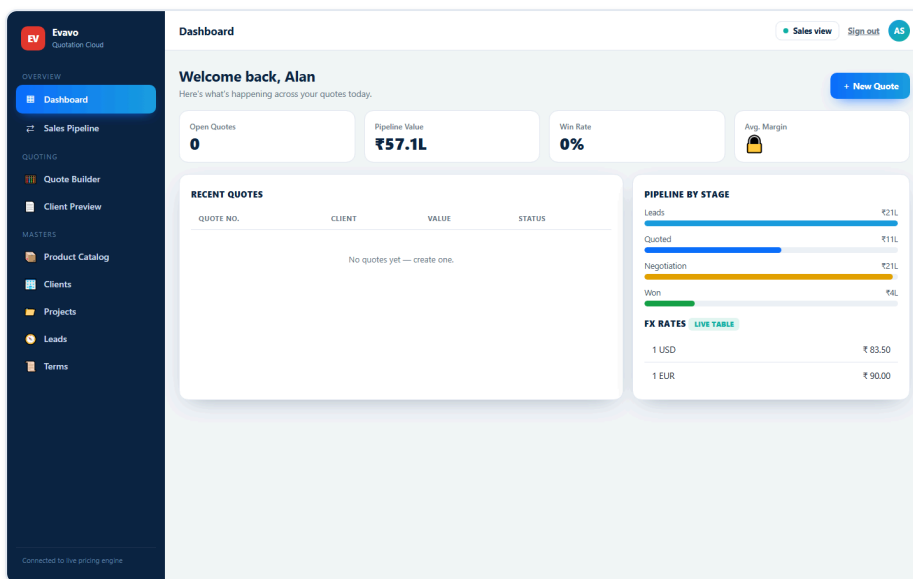
1 Sign in

Enter your work **Email** and **Password**, click **Sign in**.



2 Start a new quote

From the Dashboard, click **+ New Quote** (top right) to open the Quote Builder.



3 Enter quote details

REQUIRED **Customer** — the customer/company name.

RECOMMENDED **Client Email & WhatsApp Number** — to send the quote directly from the app.

Picking an existing **Lead** first auto-fills customer details.

Leave **Currency**, **Place of Supply** & **Default GST %** as-is unless the deal needs different values.

The screenshot shows the 'Quote Builder' interface. The left sidebar has a navigation menu with options like Dashboard, Sales Pipeline, and Quote Builder. The main area is titled 'Quote Builder' and contains sections for 'QUOTE DETAILS' (Lead, Customer, Client Email, WhatsApp Number, Customer Address, Currency, Terms Template, Place of Supply, Default GST %), 'LINE ITEMS' (with an 'Add Products' button), and a 'SUMMARY' panel on the right showing 'ADD-ON CHARGES' and a 'Final Payable' of ₹ 0.

4 Add products

REQUIRED Click **Add Products**, set quantity with **-/+**, click **Add to cart** for each item, then **Done**. A quote needs at least one product.

The screenshot shows the 'Add Products to Quote' modal. It displays a grid of salon equipment items with images, names, prices, and 'Add to cart' buttons. A 'Done' button is at the bottom right.

5 Review line items & charges

Adjust **Qty** / **Disc %** per line if needed; review add-on charges (Installation, Packaging, Freight, Import) and **Final Payable** in the Summary panel.

6 Save the quote

Click **Save Quote** — the app assigns a quote number and opens the Client Preview.

If a discount exceeds the allowed policy limit, the quote saves as **Pending Approval** until a manager/admin approves it.

7 Preview & send to client

Client Preview shows exactly what the customer receives — selling prices only, no cost/margin.

Download PDF saves the quotation. **RECOMMENDED Email to client / Send by WhatsApp** send it directly (needs Step 3 contact fields).

Saved quotes can't be edited — use **Revise** to create an editable copy.