



How To Generate
Estimate



DEEPAK AMARSHI VARIYA

Last Login: 16-08-2023 7:14 PM
Online



Search in menu...

Dashboard

Download Section

Organization

Customer

Company

Tasks

Digital Signature

Expense

Items

Sales

Purchase

Auto Bank

Reconciliation (ABR)

Company Law

Robot

Human Resource

Activities

Sales

After Clicking On The Sales

Wednesday 16th August - 2023, Time 8:20:11 PM

Clock In

Sales/Tax Invoice

Invoice

Recurring Invoice

Recurring Invoice

Retail Invoice

Retail Invoice

Credit Note

Credit Note

Estimates

Estimates

Payments/Customer Receipts

Payments Received

Sales Ledger

Sales Ledger

Items

Items

Delivery Challan

Delivery Challan

Step 1

To Add a Estimate You Have To "Select" the Estimate Tab in 'SALES' Section Shown Below



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☐ Company Law

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12 Activities

Estimates

You'll Get Many Options Like Invoice, Rec. Invoice, Estimate & Etc.

Wednesday 16th August - 2023, Time: 8:22:20 PM

 Clock In

01/08/2023 - 31/08/2023

Select Organization

Select Customer

Select Company

Select Sales By

Step 2

**NOW “CLICK” ON THE
+ BUTTON SHOWN YOU
IN THE DIAGRAM**

Export

Common Search...

[illegible]



DEEPAK VARIYA

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Online

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Invoice

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Estimates

Payments Received

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Purchase

Auto Bank Reconciliation
(ABR)

Estimates

All Estimates

Add Estimate

Organization Name *

Select Organization



Reference No. *

EST0027

Estimate Date

2023-03-31



Due Date

2023-03-31



Status

Draft

Customer *

Select Customer



Company

None



Sales By

DEEPAK VARIYA

Discount Type

No Discount

Visible To Customer *

No

You Can Switch It By Choice YES OR NO

Notes

From This Button You Can
Select The Item From
Prepared Item List For
This Estimate

Add Items

You can Add / Insert
New Item In The List

Show quantity as

Qty

Item Name	Description	HSN/SAC Code	Qty	Price	Tax Rate	Total	Action
Item Name	Description		1 Unit Type	Price	No Tax		☒
						Sub Total :	0.00
						Discount (%)	0 -0.00
						Adjustment	0 0.00
						Total :	0.00

After Completing The Form Press On Update Button
You Can Also Save The Estimate Data As Draft By Click On The Same

Close

Save As Draft

Update



DEEPAK VARIYA

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Online

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- Invoice
- Recurring Invoice
- Estimates
- Payments Received
- Sales Ledger
- Purchase
- Auto Bank Reconciliation (ABR)

Estimates

Add Items
Show to Client
Convert To Invoice
Clone
More Actions
Reminder

You will Also Get Many Option Here Like "Add Items" "Show Client" Etc. ↑

Step 4

Now You've Successfully add Estimate

Friday 31st March - 2023, Time 6:14:38 PM

← Clock Out

Here You'll Get Some Option Like Download Pdf /Send Email/Pinned



EST0027

You Can Also Edit Estimate →

Edit Estimate



DEEPAK & CO.

DEEPAK & CO.

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Email : info@anuplanonline.com

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GST No : 27AAAAA3777H1Z5

MSME No. : 123456789



DEMO NAME

Phone:

Email :

PAN No. :

GST No :

ESTIMATES NO

EST0027

Estimate Date

31-03-2023

DUE DATE

31-03-2023

Sales By

DEEPAK VARIYA

Estimate Status

Sent

#	Items	HSN/SAC Code	Qty	Price	Tax	Total
Nothing to display here!						
				Sub Total		0.00
				Total		₹ 0.00

Great.. You've Successfully Completed The Session See You In Next Slide..