

damantra.

User Manual

*The complete guide to running your shop —
from first quote to cash in the bank.*

For print, DTF, embroidery, signage & custom-merch teams
Version 1.1 · June 2026






Welcome to damantra

damantra is the operations hub for your shop. It keeps every job — and every conversation about that job — in one place, from the moment a customer asks for a quote to the moment the finished work ships out the door. **This manual walks you through that whole journey in the order you'll actually live it.**

You don't need to read it cover to cover. Each section is a self-contained task. Skim the contents, find what you're doing right now, and follow the numbered steps. Every step describes exactly what to click and what happens when you do.

HOW TO READ THE GATES

Some steps depend on your role or your plan. Wherever that matters, a small marker appears:

-  Any signed-in team member can do this.
-  Owner or admin only.
-  Available to members who hold a job role — Manager, Accounts, or Production.
-  Depends on your subscription plan.
-  Your customer does this from their portal — no account needed.

Contents

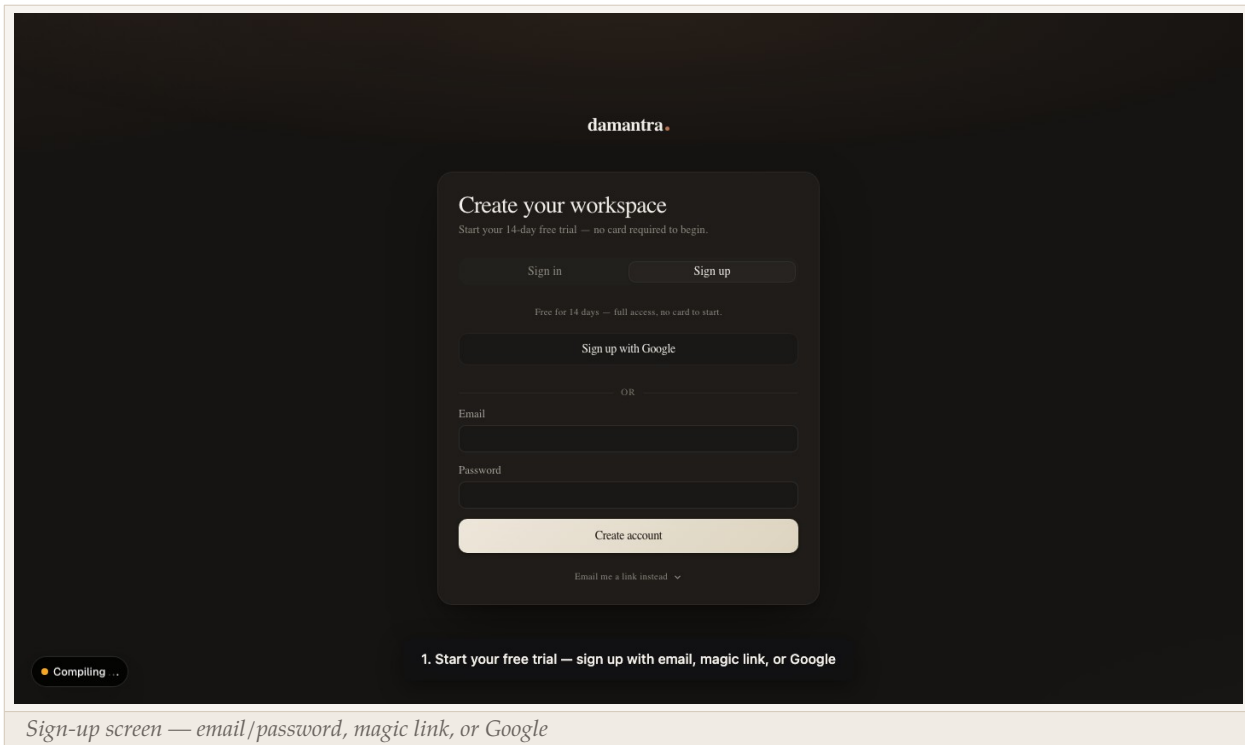
- [1. Get set up](#)
- [2. Add your first customer](#)
- [3. Quote to win the job](#)
- [4. First order & artwork sign-off](#)
- [5. Get paid](#)
- [6. Run production](#)
- [7. Fulfil & invoice](#)
- [8. Customer communication](#)
- [9. Money: invoices & reminders](#)
- [10. See how the shop is doing](#)
- [Putting it all together](#)

1. Get set up

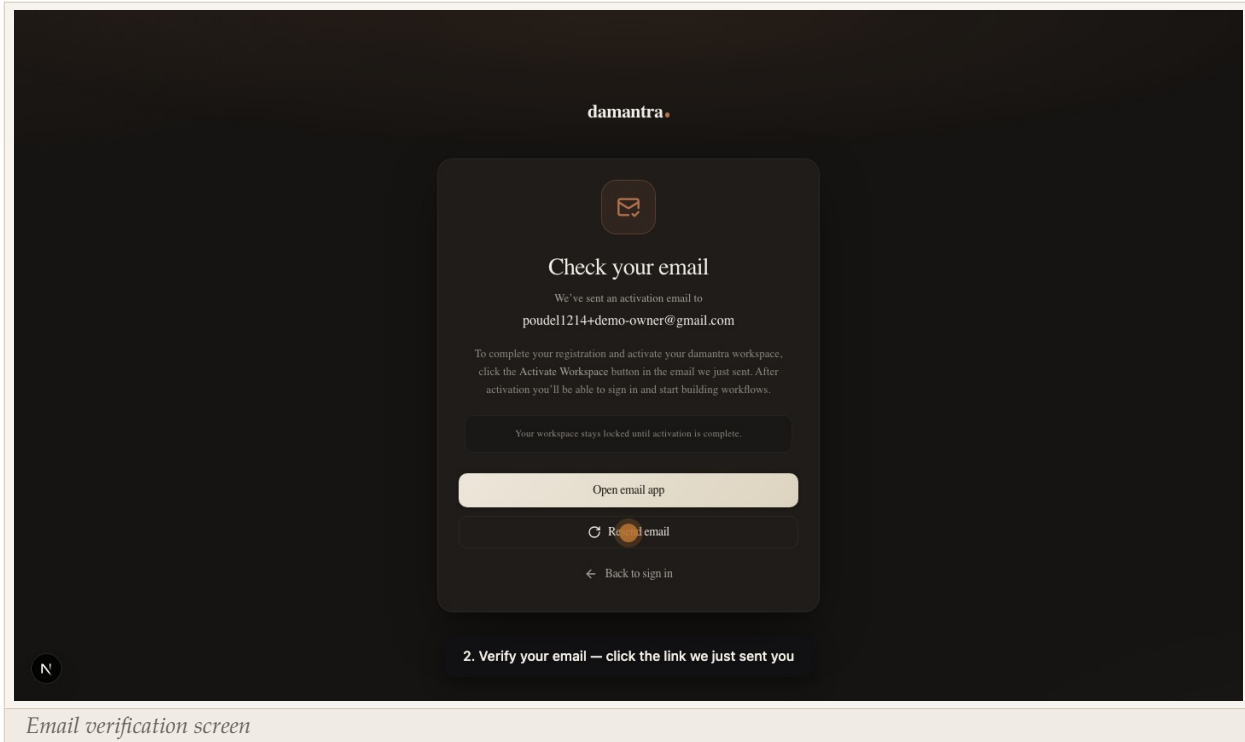
Goal: go from a brand-new account to a live workspace ready to take real work.

CREATE YOUR ACCOUNT

1. From the damantra landing page, choose **Start free trial**. This opens the sign-up screen.



2. Sign up whichever way suits you — email and password, a **magic link** sent to your inbox, or your **Google** account.



Email verification screen

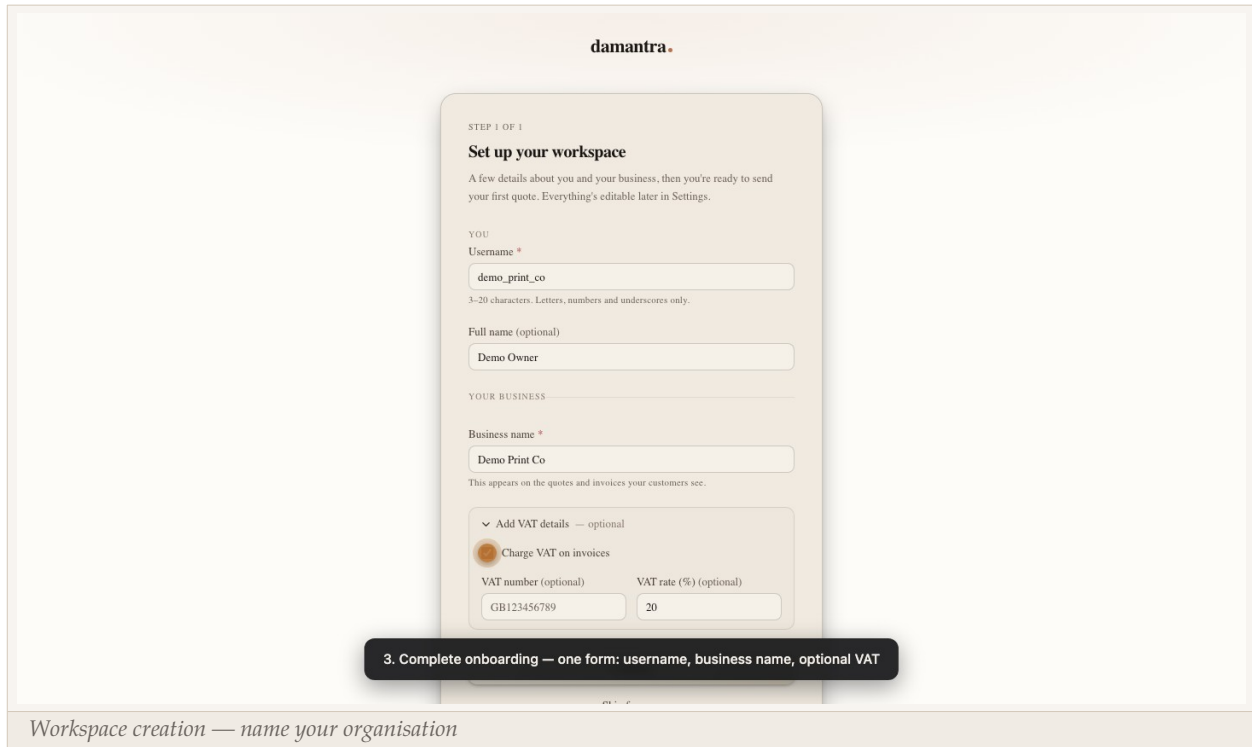
3. If asked to confirm your email, check your inbox. A *Resend verification* link is on the sign-in screen if it doesn't arrive.

GOOD TO KNOW

Your trial is a full-access, 14-day run with no card required — switched on automatically the moment you sign up.

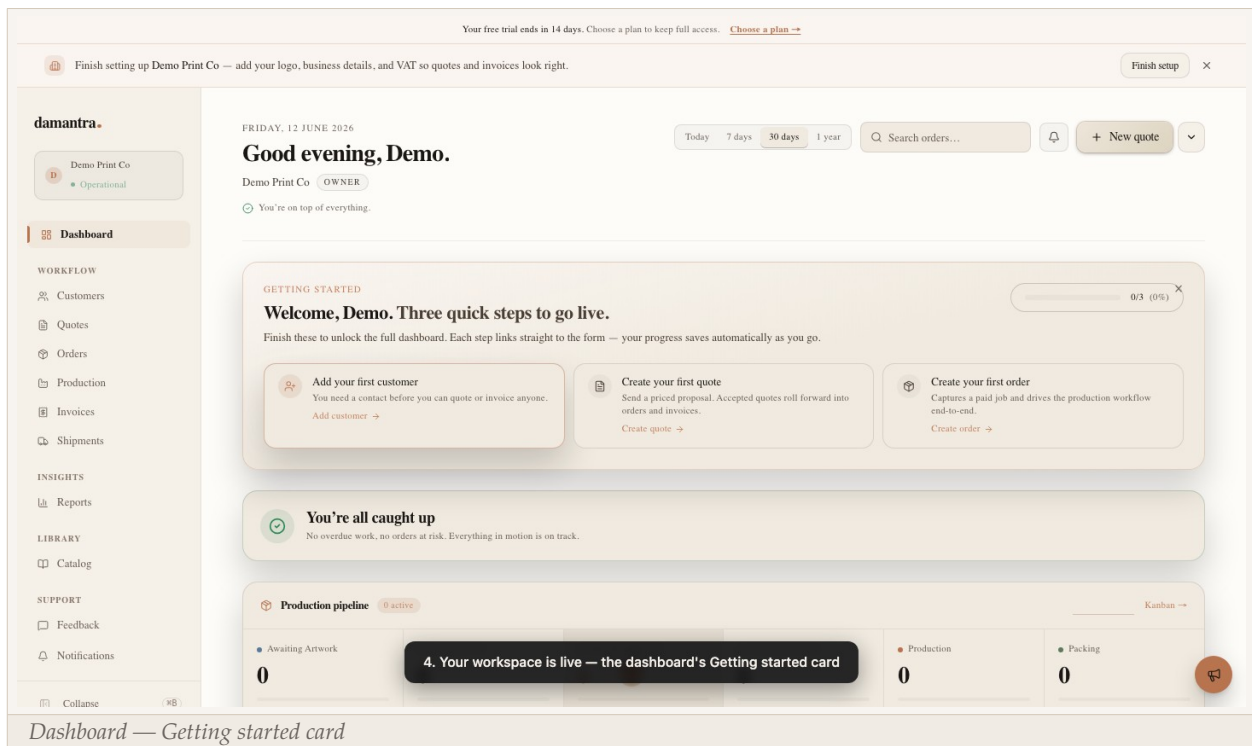
BUILD YOUR WORKSPACE

1. Complete the short profile step — your name and a username.
2. Give your workspace a name (your business). Save, and you land on your **Dashboard**.




Workspace creation — name your organisation


- The dashboard's **Getting started** card shows three activation steps: add a customer, create a quote, create an order.

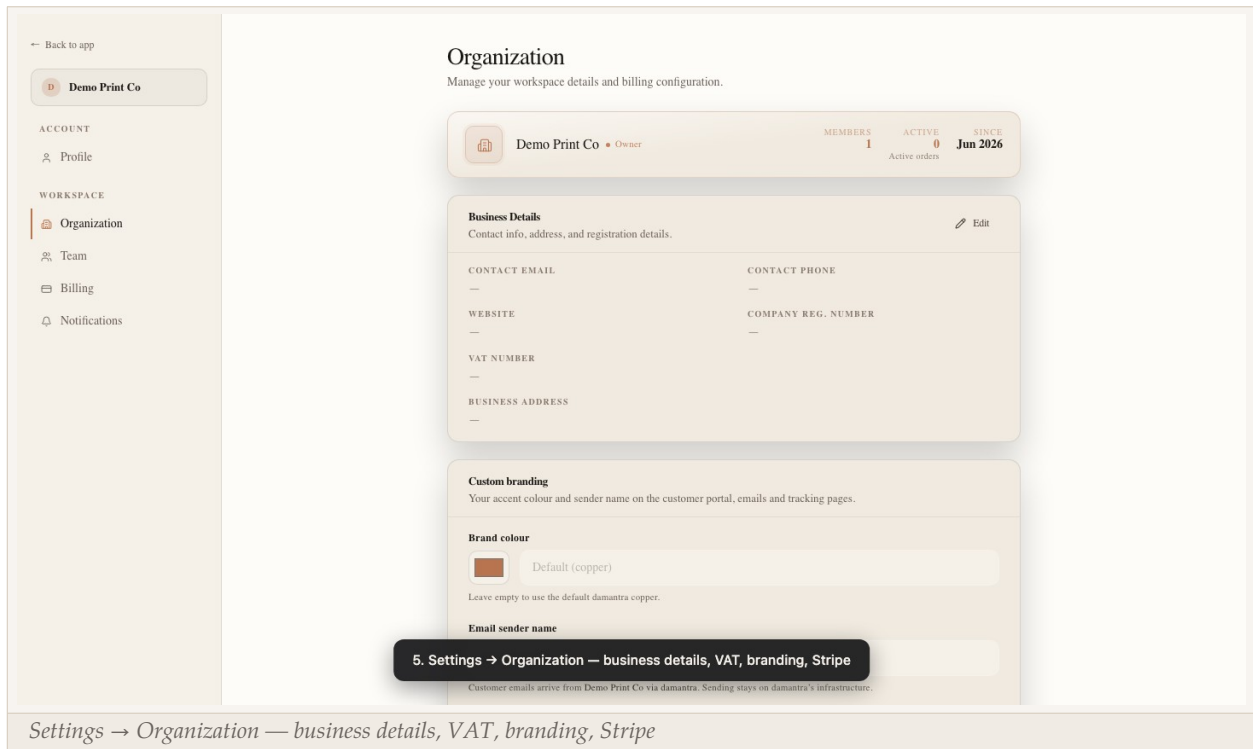


Dashboard — Getting started card

CONFIGURE YOUR BUSINESS DETAILS

Open **Settings** → **Organization** ( *owner/admin*)


- **Business basics** — name, address, phone, website, VAT number.
- **VAT** — switch on and set your rate. It flows into every quote and invoice automatically.
- **Branding**  — logo and brand colour for documents and emails. (*Upgrade card shown if not included in your plan.*)
- **Stripe** — connect for card payments. Toggle on/off or disconnect at any time.



The screenshot displays the 'Organization' settings page. On the left is a sidebar with a 'Back to app' link and a 'Demo Print Co' header. Below this are sections for 'ACCOUNT' (Profile) and 'WORKSPACE' (Organization, Team, Billing, Notifications). The main content area is titled 'Organization' and includes a sub-header 'Manage your workspace details and billing configuration.' Below this is a summary card for 'Demo Print Co' showing 1 member, 0 active orders, and a start date of Jun 2026. The 'Business Details' section contains a table with fields for Contact Email, Contact Phone, Website, Company Reg. Number, VAT Number, and Business Address. The 'Custom branding' section includes a 'Brand colour' selector (Default: copper) and an 'Email sender name' field. A callout box at the bottom of the screenshot reads: '5. Settings → Organization — business details, VAT, branding, Stripe'.

INVITE YOUR TEAM

Open **Settings** → **Team** ( *owner/admin*)

1. Invite colleagues by email; set their role — **owner, admin, or member**.
2. Assign an operational **job role** — Manager, Accounts, or Production — to unlock role-specific actions like sending quotes, confirming payments, or advancing jobs.
3. Optionally enable **permission policies**  to restrict financial actions or stage changes to specific roles.

← Back to app

Demo Print Co

ACCOUNT

- Profile

WORKSPACE

- Organization
- Team**
- Billing
- Notifications

Team

Manage who has access to Demo Print Co.

Members
1 of 1 seats used

Demo Owner (you) • Owner
Joined 12 Jun 2026 No job role

Member limit reached
Your plan includes 1 seats (members + pending invites). Upgrade to add more. [Upgrade plan](#)

Advanced permissions
Restrict what members can do based on their operational role. Owners and admins are never restricted.

- Restrict financials to finance staff**
Invoices, payments and the invoice export become visible only to owners, admins, and members with the Accounts or Manager role.
- Restrict production stage changes**
Moving orders between workflow stages is limited to owners, admins, and members with the Production or Manager role.

[Save permissions](#)

6. Settings → Team — job roles and permission policies (seats are plan-capped; invites need an upgrade)

Settings → Team — job roles and permission policies

ON JOB ROLES

“Job role” assigns a person to a set of responsibilities, not to a specific order. There is no per-order “assign to teammate” step — the board is shared and anyone with the right role can advance any job.

VIDEO [Sign-up → workspace → org settings → invite a teammate. End on a clean, set-up dashboard.](#)

2. Add your first customer

Goal: create a contact you can quote, order, and invoice against.

1. Go to **Customers** → **New** (🔒 any member).

The screenshot shows the 'New customer' form in the Damantra application. The form is divided into three sections: Customer Details, Order Defaults, and Billing Address. A tooltip points to the 'New' button in the navigation menu.

Customer Details

Customer Name *	Contact Name
<input type="text" value="e.g. Prime Print Co or Sarah Jones"/>	<input type="text" value="e.g. John Smith"/>
Email	Phone
<input type="text" value="billing@company.com"/>	<input type="text" value="+44 7700 000000"/>

Advanced Options

Order Defaults

New Orders Start At

Determines where future orders enter your workflow.

Billing Address

Company name	Contact name
<input type="text" value="Optional"/>	<input type="text"/>

Address line 1

Customer Portal Benefits

Once added, this customer gets a secure portal link — no account required.

- ✓ Receive and review quotes
- ✓ Approve artwork
- ✓ Track production progress
- ✓ View and download invoices
- ✓ Track shipments

Navigation: Customers → New — add a contact you can quote, order and invoice

2. Enter their details — business name, contact person, email, phone, notes.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) ×

damantra.

Demo Print Co
Operational

Dashboard

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Feedback

Notifications

Collapse

← Customers

New customer

Add a contact you can quote, invoice, and run production orders against.

1 Customer Details

Customer Name * Contact Name

Email Phone

Advanced Options

Notes

Internal notes — not visible to your customer.

2 Order Defaults

New Orders Start At

Determines where future orders enter your workflow.

Customer Portal Benefits

Once added, this customer gets a secure portal link — no account required.

- Receive and review quotes
- Approve artwork
- Track production progress
- View and download invoices
- Track shipments

2. Enter the customer's name, contact, email and phone

Filling in customer details

- Set the **default entry stage** — where their orders begin. A new customer starts at the top; a trusted repeat customer can skip straight past artwork review.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) ×

damantra.

Demo Print Co
Operational

Dashboard

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Feedback

Notifications

Collapse

← Customers

New customer

Add a contact you can quote, invoice, and run production orders against.

1 Customer Details

Customer Name * Contact Name

Email Phone

Advanced Options

Notes

Internal notes — not visible to your customer.

2 Order Defaults

New Orders Start At

Determines where future orders enter your workflow.

Customer Portal Benefits

Once added, this customer gets a secure portal link — no account required.

- Receive and review quotes
- Approve artwork
- Track production progress
- View and download invoices
- Track shipments

3. Set the default entry stage — where this customer's orders start

Choosing the default entry stage

4. Save. You land on the customer record — full history, recent activity, and their personal portal link.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) ×

damantra.

Demo Print Co
Operational

← Customers

NS Northgate Sports Club [Archive](#)

poude1214+demo-customer@gmail.com +44 7700 900145
Since 12 Jun 2026

TOTAL ORDERS
0
0 orders

OUTSTANDING
—
all clear

TOTAL INVOICED
—
none paid

OPEN QUOTES
—
none sent

ORDERS [New order](#)

No orders yet
Once you create an order for this customer it will appear here.

[New order](#)

INVOICES [New invoice](#)

No invoices yet

4. Save — land on the customer record with portal token and history

[New invoice](#)

DETAILS [Edit](#)

CUSTOMER
Northgate Sports Club

CONTACT
Sam Rivers

EMAIL
poude1214+demo-customer@gmail.com

PHONE
+44 7700 900145

NOTES
Repeat club-kit customer — navy/white, embroidered left chest.

DEFAULT ORDER ENTRY STAGE
Awaiting Artwork (default)

Customer record after saving

SHORTCUT

You can quick-create a customer inline while building a quote or order — no need to come here first.

VIDEO Show the default-entry-stage choice — it's the repeat-customer shortcut that saves clicks later.

3. Quote to win the job

Goal: send a priced proposal and have the customer accept it.

1. Go to **Quotes** → **New** and pick the customer. (🔒 any member)

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) ×

damantra

Demo Print Co
Operational

Dashboard

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Feedback

Notifications

Collapse

← Quotes

New quote

Send a customer a priced proposal. When they accept, the lines roll forward into an invoice and an order without re-typing.

Required: customer. Add line items on the next screen.

Customer

Northgate Sports Club

Hide details

Expiry date (optional)

15/07/2026

After this date the customer's portal link rejects the quote as expired.

Notes (optional)

Club kit — navy/white, embroidered left chest. Net 14 days.

Create quote

1. Quotes → New — pick the customer, set an expiry

New quote — pick the customer, set an expiry

2. Add **line items** — type them, or use the **catalog picker** to drop in reusable products. Totals update live; VAT applied automatically if enabled.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan](#) →

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. Finish setup ×

damantra

Demo Print Co
Operational

Dashboard

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Feedback

Notifications

Collapse

← Quotes

QT-0002 Print

Created 12/06/2026

• Draft Once you're happy with the details, send it to your customer for review.

DETAILS

Customer

Northgate Sports Club

> More details

LINE ITEMS + Add

Description	Qty	Unit price	Amount	
Premium embroidered polo — left-chest logo, i	25	£ 18	£450.00	Save
Delete				
+ Add line item				
From catalog	Pick a product...			
Description				
Setup & digitising (one-off)	1	£ 25	£25.00	Save

2. Add line items — drop in a catalog product, or type one

Adding line items from the catalog

3. Set shipping, discount, and an expiry date for auto follow-up.

LINE ITEMS + Add

Description	Qty	Unit price	Amount	
Premium embroidered polo — left-chest logo, i	25	£ 18	£450.00	Save
Delete				
Setup & digitising (one-off)	1	£ 25	£25.00	Save
Delete				
+ Add line item				
From catalog	Pick a product...			
Description				
Description	1	£ 0	£0.00	Add

Subtotal £475.00

Discount + Add

Shipping + Add

VAT (20%) £95.00

Grand Total £570.00

Send quote poudel1214+demo-customer@gmail.com

SHIPPING

SHIPPING

3. Totals calculate live — subtotal, VAT and grand total

Quote totals with shipping and VAT

4. Choose **Send quote**  — emails the customer a portal link, or gives you a link to copy.

damantra

Demo Print Co
Operational

Dashboard

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Feedback

Notifications

Collapse

Demo Owner
@demo_print_co

SHIPPING

SHIPPING

No address on file

Edit on customer profile

LINE ITEMS + Add

Description	Qty	Unit price	Amount	
Premium embroidered polo — left-chest logo, c	25	£ 18	£450.00	Save
Delete				
Setup & digitising (one-off)	1	£ 25	£25.00	Save
Delete				
+ Add line item				
Subtotal			£475.00	
Discount			+ Add	
Shipping			+ Add	
VAT (20%)			£95.00	
Grand total			£570.00	

EMAIL

Send to customer poudell1214+dem
Last sent 6/12/2026, 9:00:38 PM

4. Send quote — emails the customer their portal link

Quote ready to send

VERTICAL SPECS

Thread colours, stitch counts, materials, size runs — enter these in **line-item descriptions** and **order notes**. There is no separate structured spec field.

WHAT THE CUSTOMER SEES

The customer opens their **magic-link portal** — no account, no password. They **Accept**, request changes, or decline.

Customer portal — quote acceptance

The screenshot shows a customer portal interface for 'Demo Print Co'. The user is signed in as 'Northgate Sports Club'. The navigation menu includes Dashboard, Orders, Quotes, Invoices, Messages, and Feedback. The current page is titled 'Quotes - QT-002'. The main content area displays a quote for 'QT-002 - Premium Embroidered Polo - Left-Chest Logo, Customer Colours - 26 units' with a total amount of £570.00 (including 20% VAT). A progress bar indicates the quote status: Draft, Sent, Viewed, and Accepted. Below the progress bar is a 'QUOTE BREAKDOWN' table:

DESCRIPTION	QTY	UNIT PRICE	AMOUNT
Premium Embroidered Polo - Left-Chest Logo, Customer Colours.	25	£18.00	£450.00
Setup & Digitising (One-Off)	1	£25.00	£25.00
		Subtotal	£475.00
		VAT (20%)	£95.00
		Total	£570.00

Below the table, the terms of service are displayed: 'Club kit - navy/white, embroidered left chest. Net 14 days.' At the bottom of the screen, there is an 'Accept Quote' button and a circular icon with a checkmark.

On acceptance the quote **converts to an order automatically** — customer, line items, and totals carry across.

VIDEO Build a quote from the catalog → send → accept in the portal on a phone.

4. First order & artwork sign-off

Goal: capture the job and get the artwork formally approved.

1. Open an order (converted from a quote, or via **Orders** → **New**). (🔒)

The screenshot displays the Damantra interface for an order workspace. At the top, a notification states 'Your free trial ends in 14 days. Choose a plan to keep full access.' Below this, a 'Finish setting up Demo Print Co' banner is visible. The main content area shows the order details for 'ORD-0001' in the 'Awaiting Artwork' status. The order description is 'Premium embroidered polo — left-chest logo, customer colours.' Below the description are buttons for 'Northgate Sports Club', 'QT-0002', 'DUE DATE', '+ Set due date', 'Files', and 'Messages'. An 'Invoice' button is also present. A 'NEXT ACTION' section titled 'Waiting on customer artwork' indicates that the customer has not uploaded artwork yet, with options to 'Go to artwork & files' or 'Message customer'. A 'PRODUCTION STAGE' stepper shows the progress from 'Awaiting Artwork' to 'Shipped', with 'Awaiting Artwork' being the current stage. A tooltip at the bottom of the stepper reads '1. Open the order — details, files, conversation, stage stepper'. The bottom navigation bar includes 'ARTWORK & FILES' and 'PAYMENT' tabs. A sidebar on the left contains navigation options like 'Dashboard', 'Customers', 'Quotes', 'Orders', 'Production', 'Invoices', 'Shipments', 'Reports', 'Catalog', 'Feedback', and 'Notifications'.

Order workspace — details, files, thread, stage stepper

2. The order workspace holds everything: details, files, the conversation thread, and the stage stepper.
3. Drag in the **artwork**. For revisions, upload a **new version** rather than replacing — full history is kept.

The screenshot shows the Damantra interface for order ORD-0001. The order is in the 'Design Review' stage. A callout box with a white background and black text says "2. Upload artwork — kept as versioned proofs, never overwritten". The interface includes a sidebar with navigation options like Dashboard, Customers, Quotes, Orders, Production, Invoices, Shipments, Reports, and Catalog. The main content area shows the order details, a 'NEXT ACTION' section with 'Approve artwork' and 'Request changes' buttons, and a 'PRODUCTION STAGE' progress bar with steps: Awaiting Artwork, Design Review (active), Artwork Approved, Awaiting Payment, Production, Packing, Ready to Ship, and Shipped. A 'Design Review' section below the progress bar contains a 'Back to Awaiting Artwork' button.

Uploading artwork

4. Choose **Send as proof** — marks the active proof, moves the order to **Design Review**, and emails the customer.

This screenshot is similar to the previous one, but the 'Design Review' step in the 'PRODUCTION STAGE' progress bar is now highlighted with a red dot, indicating it is the active stage. A callout box with a white background and black text says "3. Send as proof — moves to Design Review and emails the customer". The rest of the interface, including the sidebar and 'NEXT ACTION' section, remains the same.

Proof sent — order moves to Design Review

5. 🌐 The customer **approves** (timestamped sign-off) or requests changes from their portal.

ORD-0001 - Part of QT-0002 - Premium Embroidered Polo - Left-Chest Logo, Customer Colours. STATUS: Awaiting payment

Payment Required

Your artwork has been approved. Complete payment to start production.

£570.00 inc. 20% VAT

Contact Demo Print Co to arrange payment for this order.

ORDER SUMMARY

ITEM	QTY	UNIT	TOTAL
Premium Embroidered Polo - Left-Chest Logo, Customer Colours.	25	£18.00	£450.00
Setup & Digitising (One-Off)	1	£25.00	£25.00
		Subtotal	£475.00
		VAT (20%)	£95.00
		Total	£570.00

PRODUCTION

Order Created - Artwork Approved - Payment - Production

Customer portal — artwork approval screen

APPROVAL CAN'T BE GAMED

Uploading a new file after approval automatically re-opens review. The sign-off always refers to what was actually approved.

You can also approve on the customer's behalf — advance the stage to **Artwork Approved**, and damantra records who approved it.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan ->](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. Finish setup X

damantra

Demo Print Co
1 needs attention

Dashboard

ATTENTION
Awaiting payment 1

WORKFLOW
Customers
Quotes

Orders

Production
Invoices
Shipments

INSIGHTS
Reports

LIBRARY
Catalog

SUPPORT
Collapse

Orders / ORD-0001

ORD-0001 Awaiting Payment

Premium embroidered polo — left-chest logo, customer colours.

Northgate Sports Club QT-0002 DUE DATE + Set due date Files Messages

Invoice

NEXT ACTION
Awaiting payment
The customer has approved the artwork. Production will begin automatically once payment is received.

PRODUCTION STAGE

Awaiting Artwork (12 Jun - 21:02) Design Review (12 Jun - 21:10) Artwork Approved Awaiting Payment Production Packing Ready to Ship Shipped

Awaiting Payment
Waiting for the customer to complete payment before production begins - in this stage since 12 Jun 2026 Back to Artwork Approved

ARTWORK & FILES 1 PAYMENT

Stage advanced to Artwork Approved — timestamped record

VIDEO Upload → send proof → customer approves → watch the stage advance and the record appear.

5. Get paid

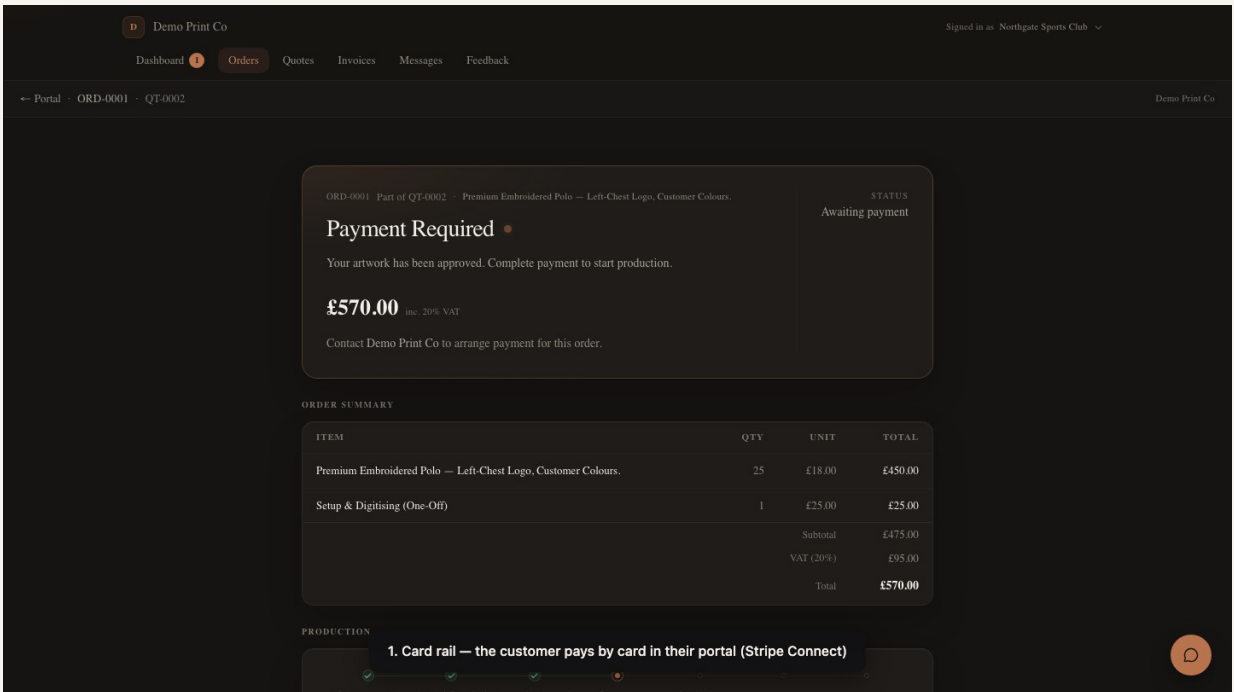
Goal: confirm payment so production can begin.

THE PRODUCTION GATE

This is a hard rule enforced by the system: an order **cannot** move into Production until **both** artwork is approved **and** payment is confirmed. There are two ways to confirm:

OPTION A — CUSTOMER PAYS BY CARD

 From their portal, the customer pays via Stripe checkout before production starts. Payment reconciles automatically and the order advances.



ORD-0001 Part of QT-0002 - Premium Embroidered Polo - Left-Chest Logo, Customer Colours. STATUS: Awaiting payment

Payment Required

Your artwork has been approved. Complete payment to start production.

£570.00 inc. 20% VAT

Contact Demo Print Co to arrange payment for this order.

ORDER SUMMARY


ITEM	QTY	UNIT	TOTAL
Premium Embroidered Polo - Left-Chest Logo, Customer Colours.	25	£18.00	£450.00
Setup & Digitising (One-Off)	1	£25.00	£25.00
		Subtotal	£475.00
		VAT (20%)	£95.00
		Total	£570.00

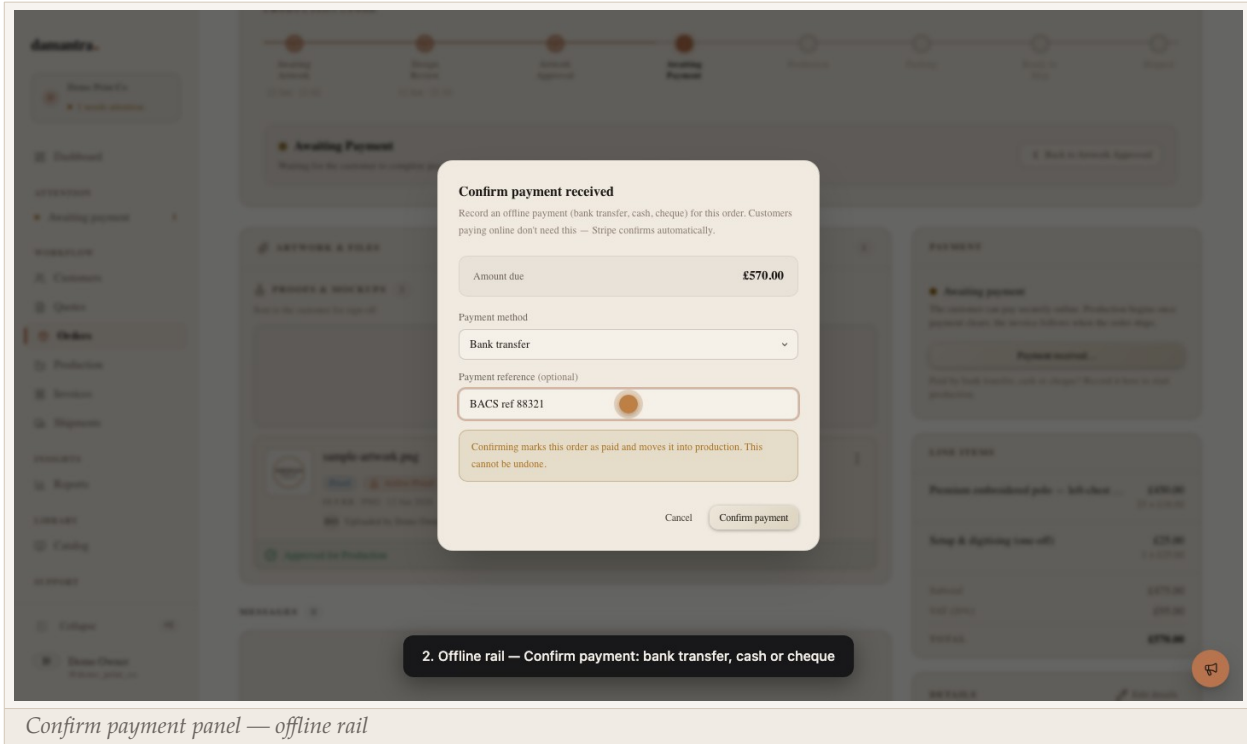
PRODUCTION

1. Card rail — the customer pays by card in their portal (Stripe Connect)

Customer portal — Stripe checkout

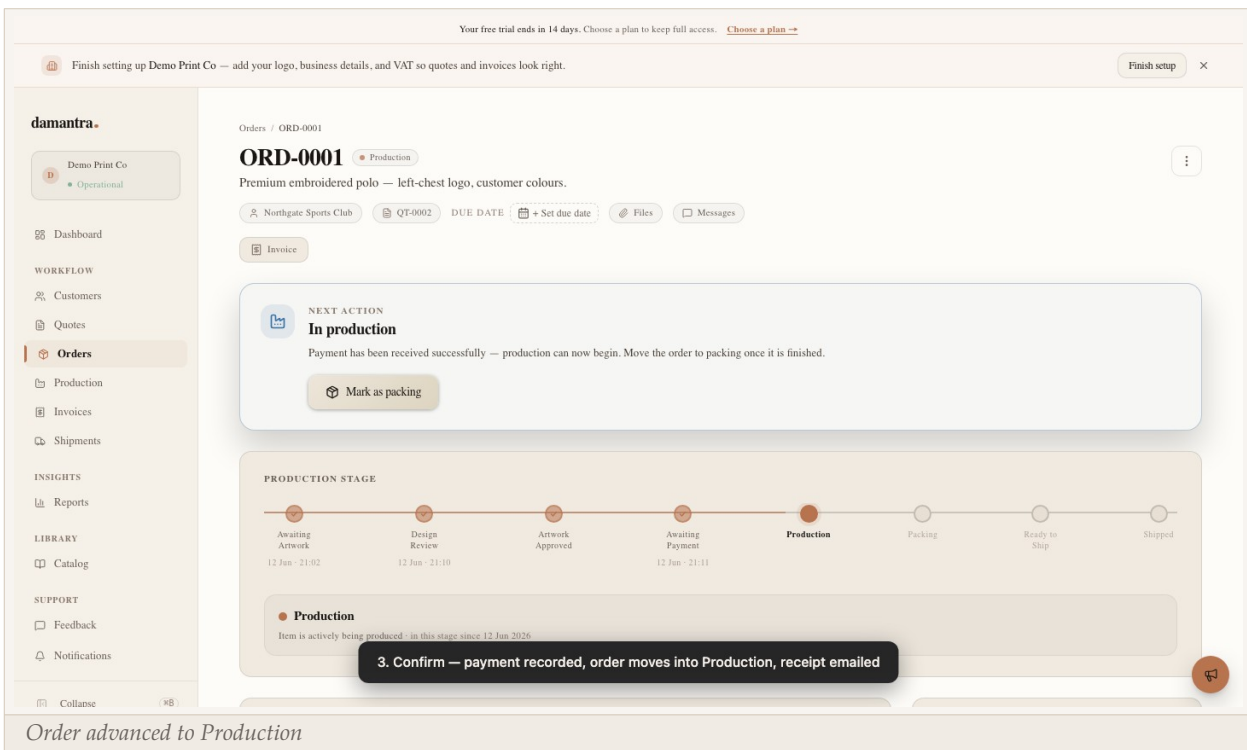
OPTION B — RECORD AN OFFLINE PAYMENT

 Open the order and choose **Confirm payment**. Pick the method — **bank transfer, cash, cheque, or other** — add a reference, and confirm. Same outcome as card.



Confirm payment panel — offline rail


Either way, a receipt goes to the customer and the order moves to Production.



Order advanced to Production

ON PAYMENTS

Payment is recorded as paid in full or not yet paid. There is no partial-payment or deposit-then-balance step — confirming payment is one action that opens the production gate.

 **VIDEO** *Show both rails — portal card payment, then the offline Confirm payment panel.*

6. Run production

Goal: move work across the floor on one shared board.

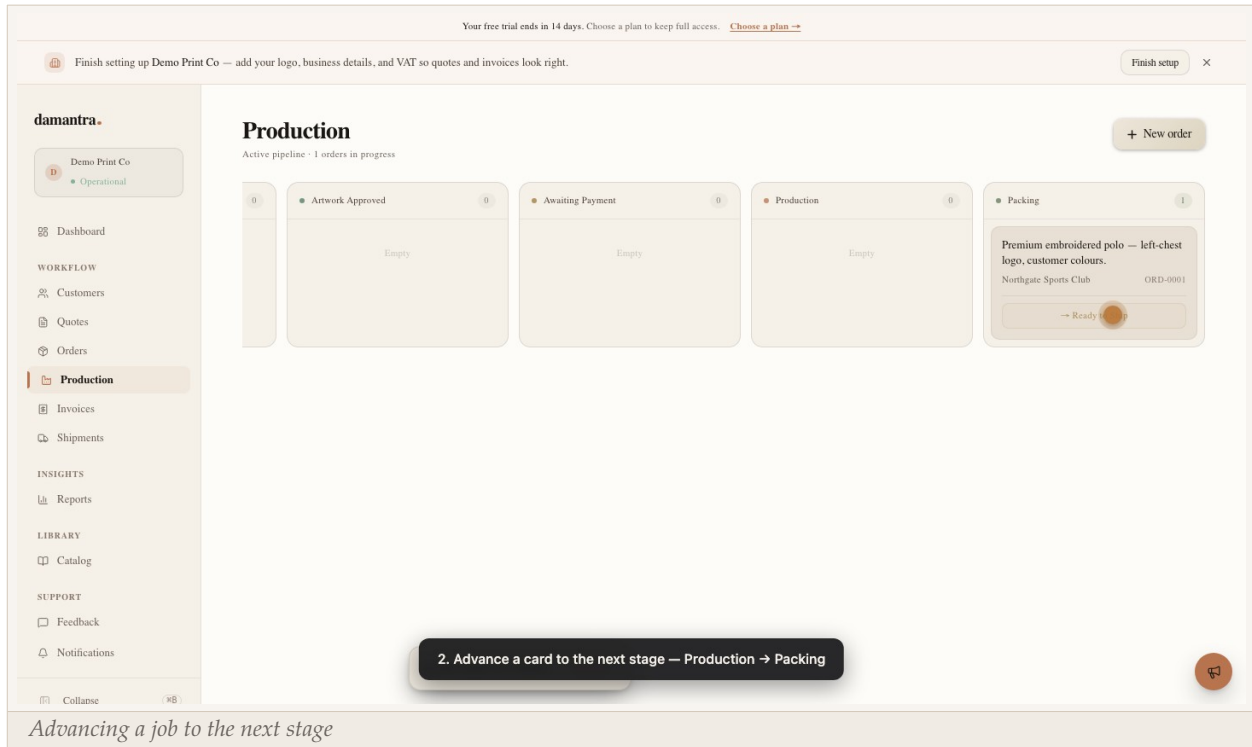
1. Open **Production** — the kanban board. (🔒)

The screenshot shows the Damantra Production Kanban Board. The interface includes a sidebar with navigation options: Dashboard, WORKFLOW (Customers, Quotes, Orders), **Production** (selected), Invoices, Shipments, INSIGHTS (Reports), LIBRARY (Catalog), and SUPPORT (Feedback, Notifications). The main area displays the Production Kanban Board with the following stages: Design Review, Artwork Approved, Awaiting Payment, and Production. A card is visible in the Production stage for 'Premium embroidered polo' with details: 'Premium embroidered polo — left-chest logo, customer colours.', 'Northgate Sports Club', and 'ORD-0001'. A tooltip at the bottom of the board reads: '1. Production — one shared board, cards grouped across the 8 stages'. The caption below the screenshot reads: 'Production kanban board — all 8 stages'.

2. Jobs span eight stages:

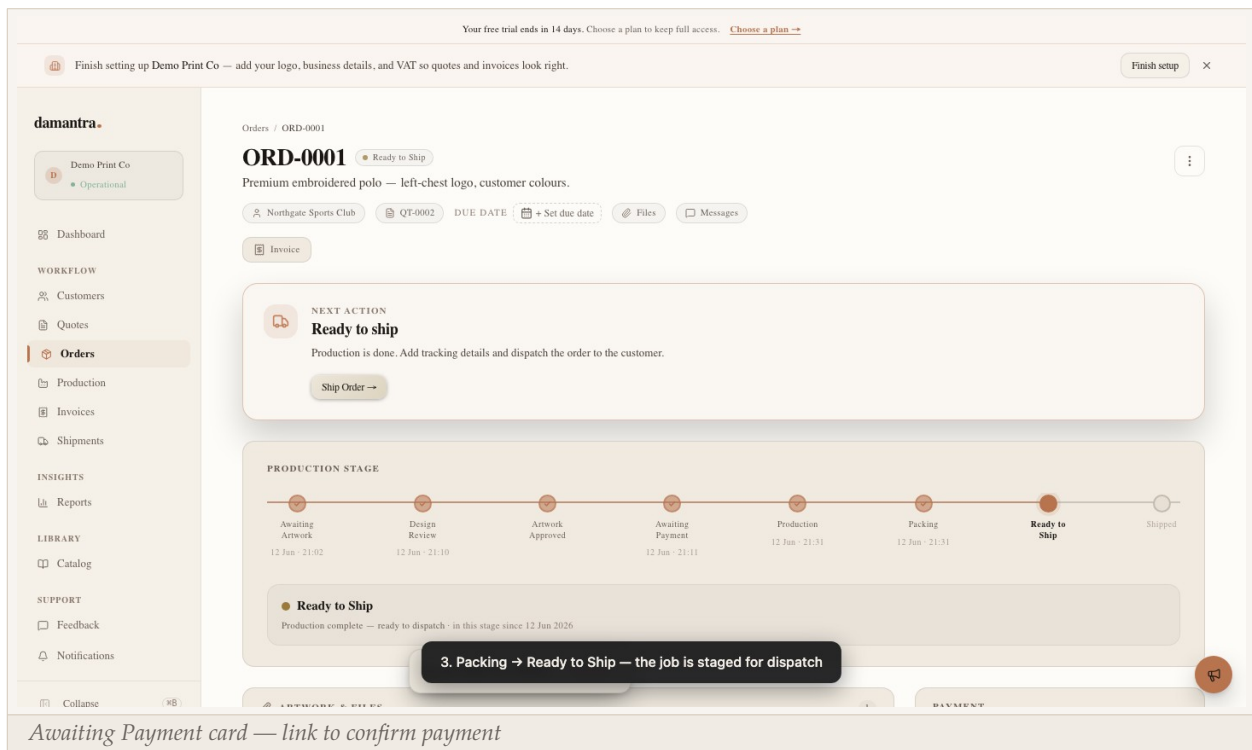
Awaiting Artwork → Design Review → Artwork Approved → Awaiting Payment → Production → Packing → Ready to Ship → Shipped

3. **Advance a job** to the next stage. 🛒 (Stage changes can be restricted to Production/Manager roles in settings.)



Advancing a job to the next stage

4. A job at **Awaiting Payment** links back to the order to confirm payment before moving on.

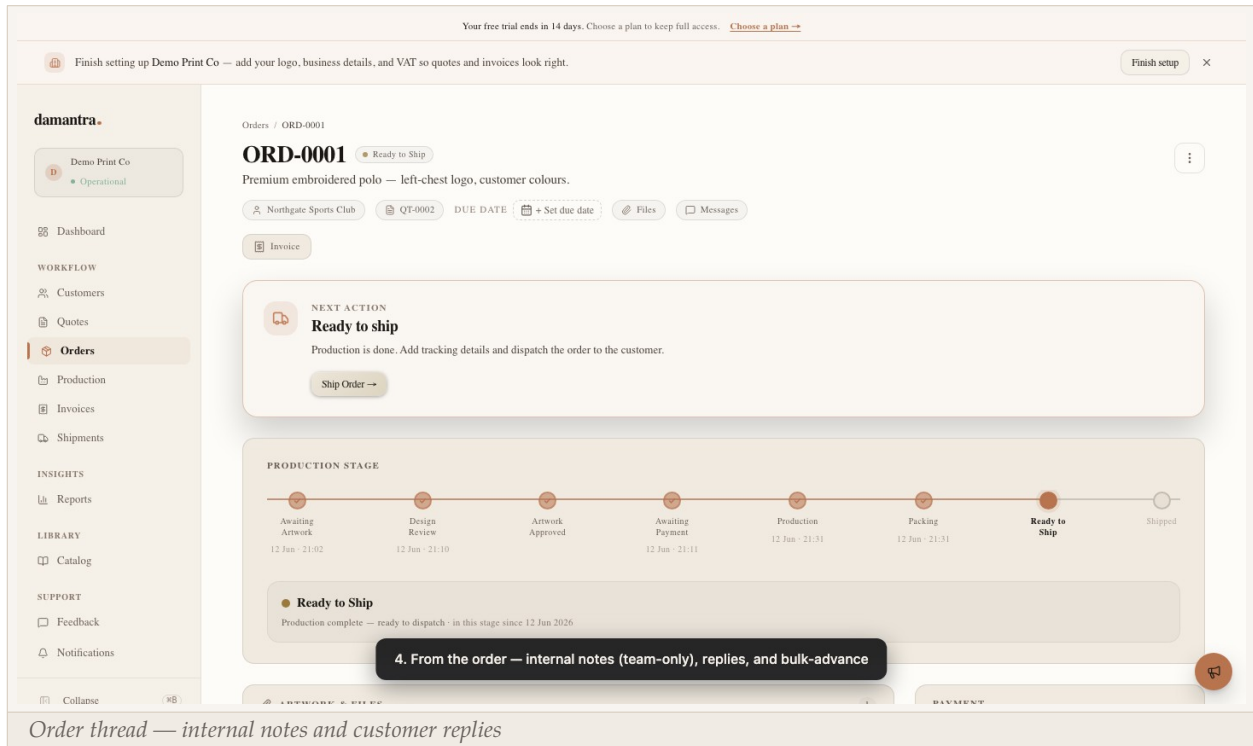


Awaiting Payment card — link to confirm payment

FROM THE ORDER ITSELF

- Add **internal notes** — team-only.

- Reply to the customer — they get an email with a portal link.
- Bulk-advance orders from the Orders list.



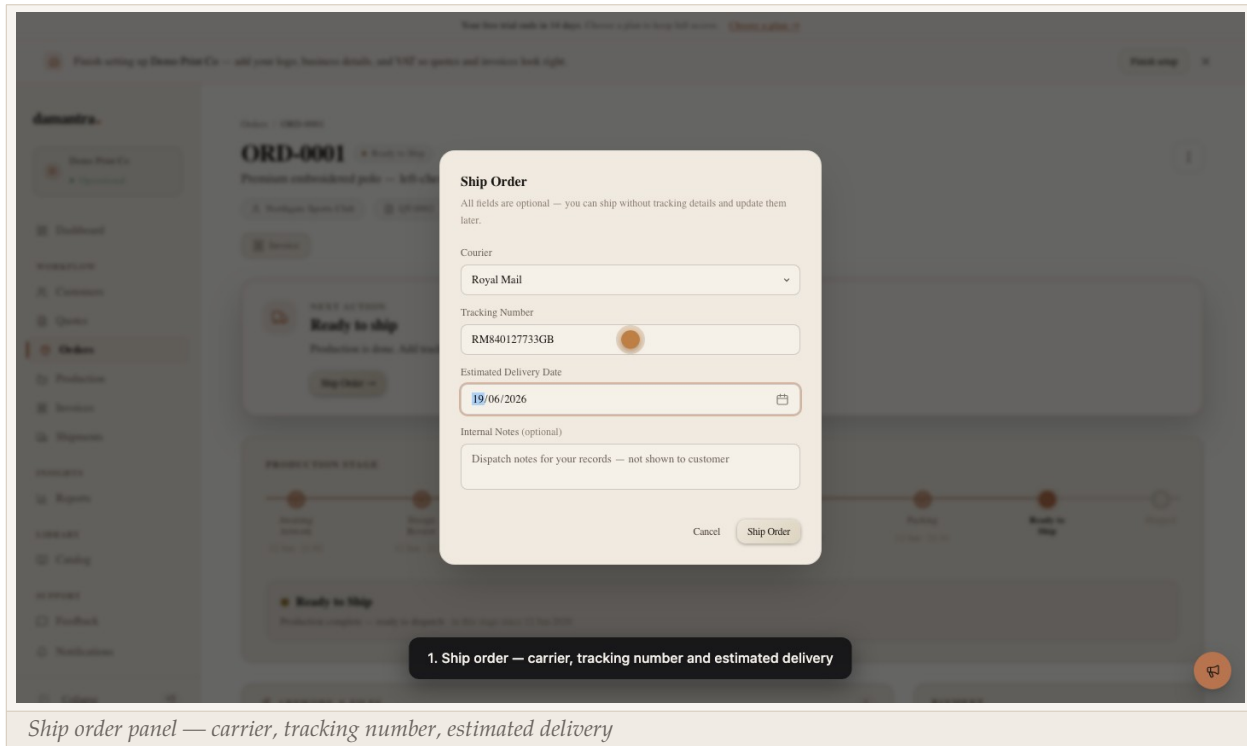
Due dates and priority flags surface overdue or at-risk work; bottlenecks show on the dashboard funnel.

VIDEO Drag Production → Packing → Ready to Ship; show it refreshing on a second screen.

7. Fulfil & invoice

Goal: ship the job — invoice raised automatically.

1. On the order, choose **Ship order**. Enter carrier, tracking number, URL, and estimated delivery. (🔒)



2. Shipping triggers three things at once:
 - Creates the **shipment record** (visible under Shipments).
 - Raises the **invoice** automatically — VAT applied.
 - Updates the customer's portal and the public tracking page.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. Finish setup ×

damantra.

Demo Print Co
Operational

Dashboard

WORKFLOW

- Customers
- Quotes
- Orders**
- Production
- Invoices
- Shipments

INSIGHTS

- Reports

LIBRARY

- Catalog

SUPPORT

- Feedback
- Notifications

Collapse

Orders / ORD-0001

ORD-0001 Shipped

Premium embroidered polo — left-chest logo, customer colours.

Northgate Sports Club QT-0002 DUE DATE + Set due date Files Messages

Invoice

NEXT ACTION
Order shipped
This order is complete and on its way to the customer.
[View shipment →](#)

PRODUCTION STAGE

Stage	Start	End	Status
Awaiting Artwork	12 Jun - 21:02		Completed
Design Review	12 Jun - 21:10		Completed
Artwork Approved			Completed
Awaiting Payment	12 Jun - 21:11		Completed
Production	12 Jun - 21:51		Completed
Packing	12 Jun - 21:51		Completed
Ready to Ship	12 Jun - 21:31		Completed
Shipped			Completed

Shipped
Order dispatched to customer - in this stage since 12 Jun 2026.

2. Shipping creates the shipment and auto-raises the invoice (VAT applied)

Auto-raised invoice and shipment record

3. Share the public tracking page — no customer login needed.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. Finish setup ×

damantra.

Demo Print Co
Operational

Dashboard

WORKFLOW

- Customers
- Quotes
- Orders
- Production
- Invoices
- Shipments**

INSIGHTS

- Reports

LIBRARY

- Catalog

SUPPORT

- Feedback
- Notifications

Collapse

Shipments

Dispatch log · 1 total

[+ New shipment](#)

ORDER	CUSTOMER	CARRIER	TRACKING	SHIPPED	STATUS
Premium embroidered polo — left-chest logo, customer colours. ORD-0001	Northgate Sports Club	Royal Mail	RMS40127733GB	12 Jun 2026	Delivered

3. The shipment record — carrier, tracking and status, in Shipments

Public tracking page — no login required

4. When delivered, choose Mark delivered.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) X

damantra

Demo Print Co
Operational

Dashboard

WORKFLOW

- Customers
- Quotes
- Orders
- Production
- Invoices
- Shipments**

INSIGHTS

- Reports

LIBRARY

- Catalog

SUPPORT

- Feedback
- Notifications

Collapse

← Shipments

Premium embroidered polo — left-chest logo, customer colours. Delivered

ORD-0001 · Northgate Sports Club

SHIPMENT LIFECYCLE Delivered

Carrier	Royal Mail
Tracking number	RM840127733GB
Track shipment	Track shipment →
Est. delivery	19 June 2026
Shipped	12 June 2026 at 21:37
Delivered	12 June 2026 at 21:39

Delete shipment



4. When it lands — Mark delivered on the shipment

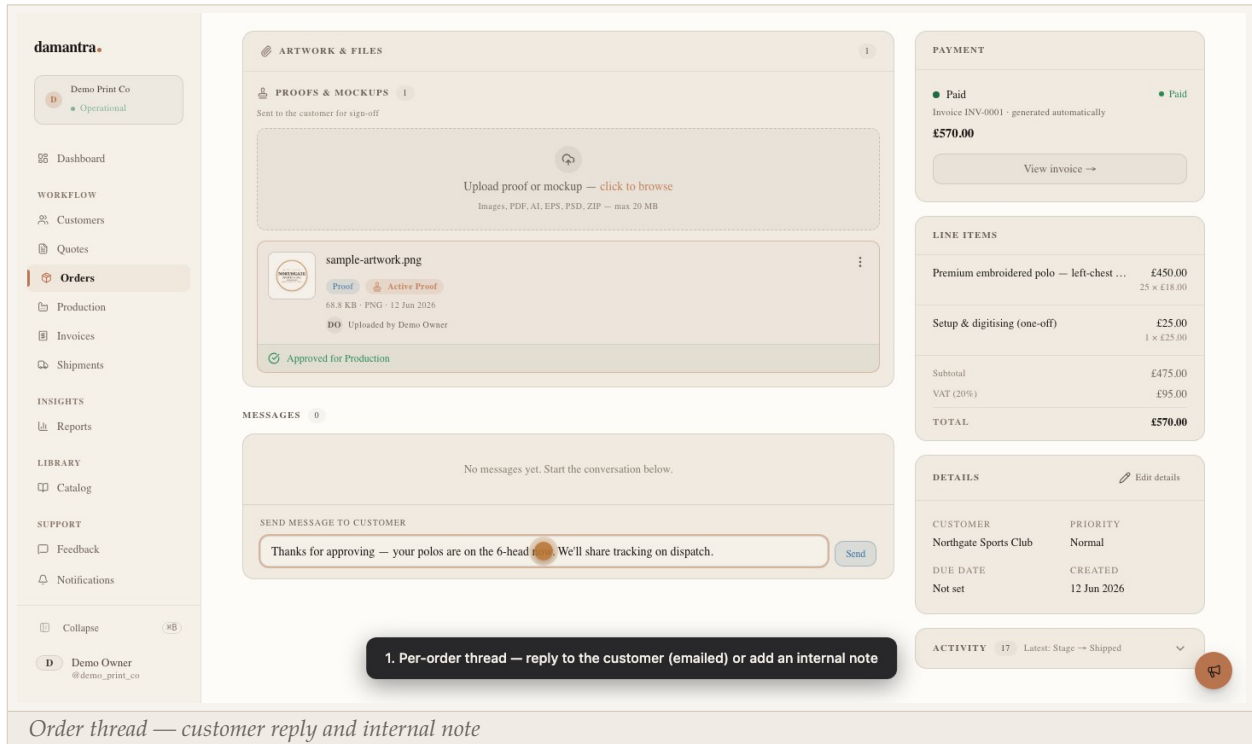
Shipment marked as delivered

VIDEO Record shipment + tracking → show the auto-created invoice and the public tracking link.

8. Customer communication

Goal: keep every conversation attached to the job.

- **Per-order thread**  — post replies to the customer (emailed with a portal link) or internal notes (team-only).
- **Customer replies**  — raise an **action-required** notification automatically.



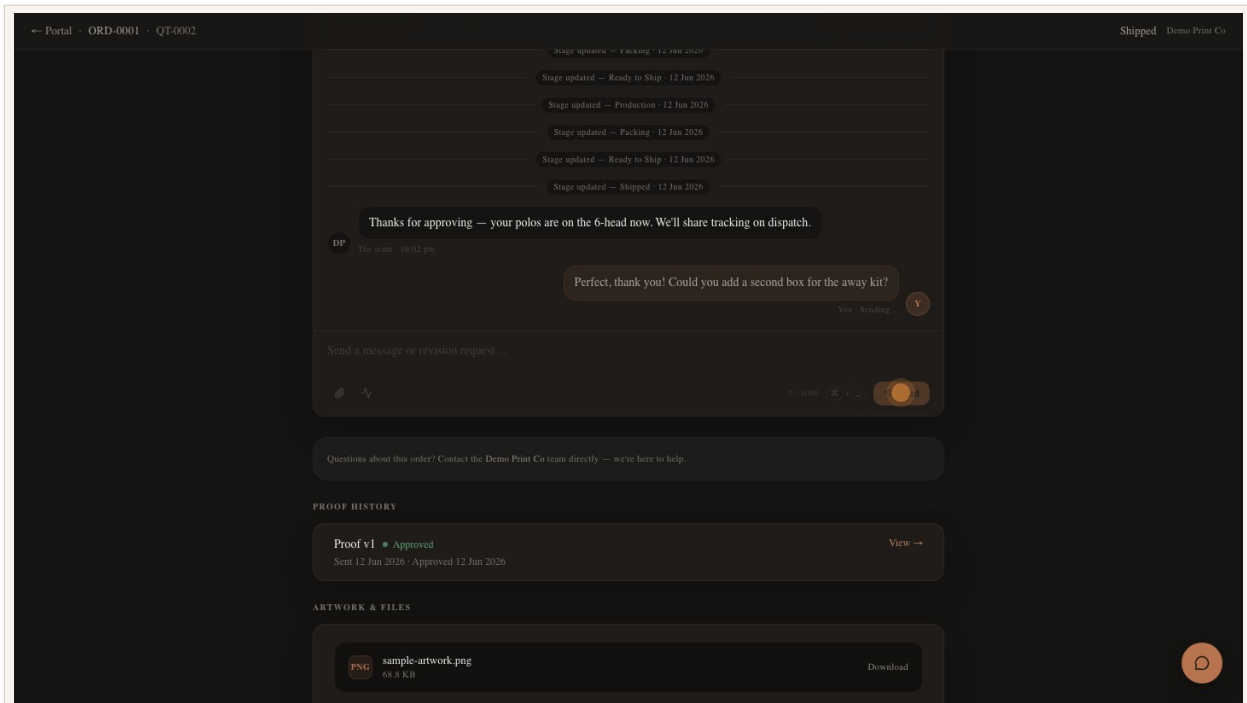
The screenshot displays the Damantra interface for an order. On the left is a navigation sidebar with sections: Dashboard, WORKFLOW (Customers, Quotes, Orders, Production, Invoices, Shipments), INSIGHTS (Reports), LIBRARY (Catalog), and SUPPORT (Feedback, Notifications). The main content area is titled 'ARTWORK & FILES' and shows a 'PROOFS & MOCKUPS' section with an upload prompt and a file named 'sample-artwork.png' (68.8 KB, PNG, 12 Jun 2026) which is 'Approved for Production'. Below this is a 'MESSAGES' section with a 'SEND MESSAGE TO CUSTOMER' input field containing the text 'Thanks for approving — your polos are on the 6-head 🍌 We'll share tracking on dispatch.' and a 'Send' button. A dark tooltip at the bottom of the message field reads: '1. Per-order thread — reply to the customer (emailed) or add an internal note'. To the right, the 'PAYMENT' section shows 'Paid' status for invoice INV.0001 with a total of £570.00. Below that is a 'LINE ITEMS' table:

LINE ITEMS	Amount
Premium embroidered polo — left-chest ...	£450.00 (25 x £18.00)
Setup & digitising (one-off)	£25.00 (1 x £25.00)
Subtotal	£475.00
VAT (20%)	£95.00
TOTAL	£570.00

The 'DETAILS' section shows customer information: Northgate Sports Club, Priority Normal, Due Date Not set, and Created 12 Jun 2026. At the bottom right, an 'ACTIVITY' bar shows 17 items, with the latest stage being 'Shipped'.

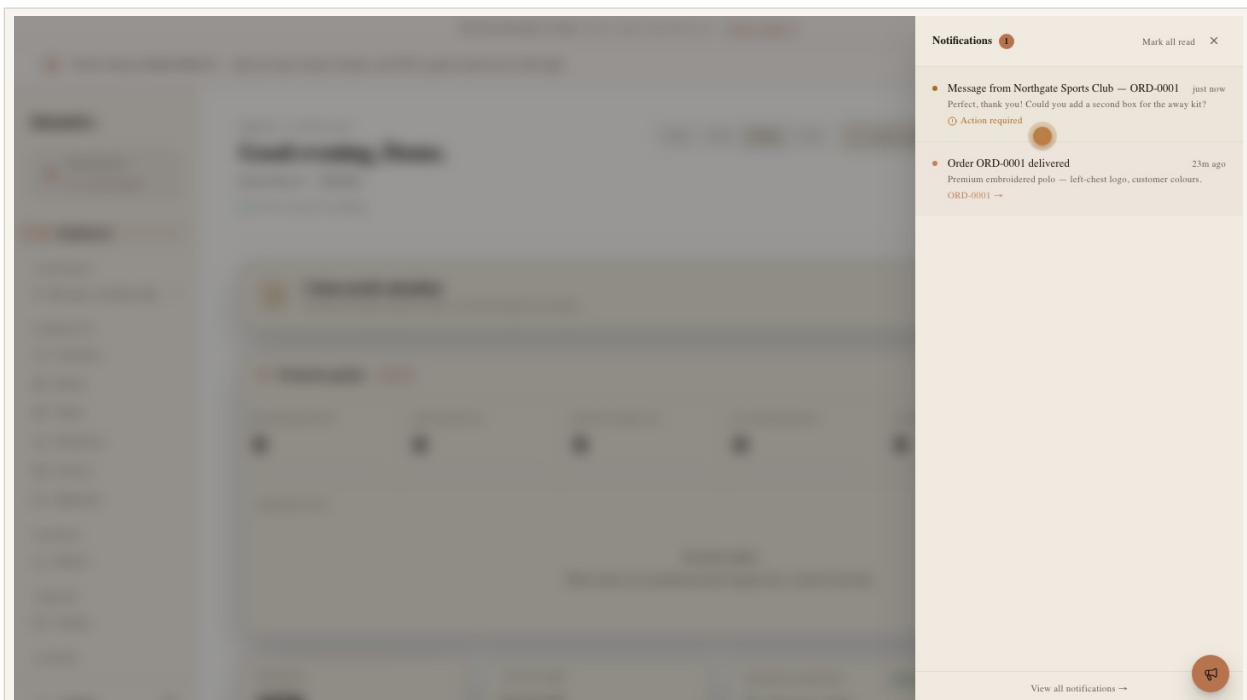
Order thread — customer reply and internal note

- **Notification bell** — top-bar count and flyout listing what needs you.

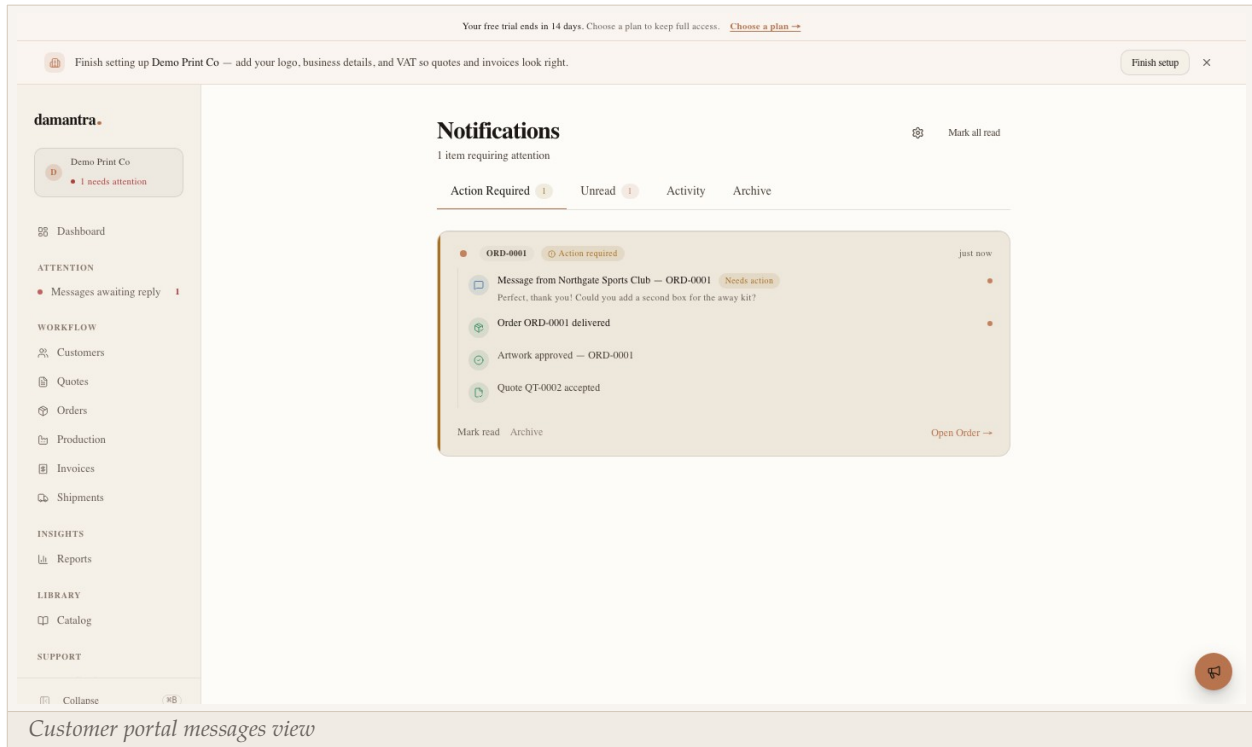


Notification bell — action-required flyout

- **Notifications centre** — Unread / All / Activity tabs. Mark read, open, archive, or clear.



Notifications centre — Unread tab



Customer portal messages view

PRIVACY

Members without financial access don't see money-related notifications.

 VIDEO Customer sends a portal message → bell lights up → open and reply from the order thread.

9. Money: invoices & reminders

Goal: track what's owed and chase it automatically.

1. Open **Invoices** — filter by draft / sent / **overdue** / paid / void.  (Hidden from members without financial access.)

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan →](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) ×

damantra.

Demo Print Co
• 1 needs attention

Dashboard

ATTENTION

• Messages awaiting reply 1

WORKFLOW

Customers

Quotes

Orders

Production

Invoices

Shipments

INSIGHTS

Reports

LIBRARY

Catalog

SUPPORT

Collapse

Invoices New invoice

1 total

OUTSTANDING
£0
none pending

OVERDUE
—
all current

PAID THIS MONTH
£570.00
collected

DRAFT PIPELINE
—
none

• Paid

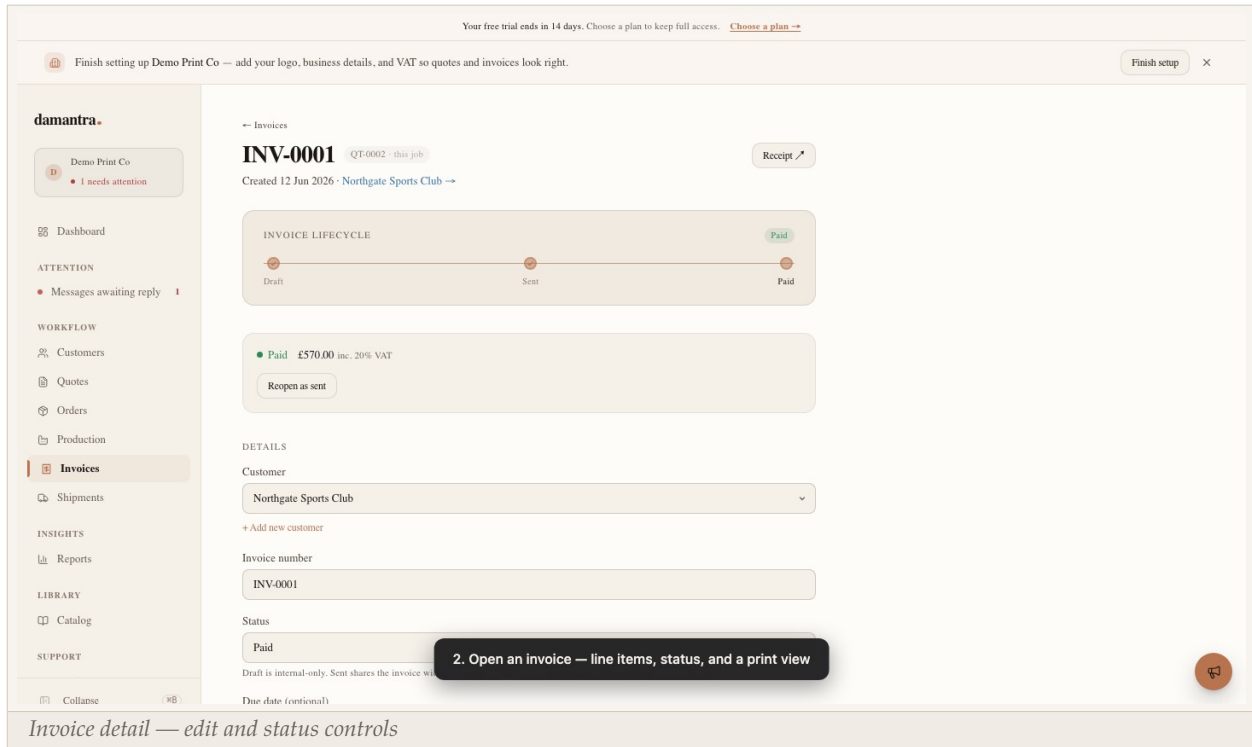
All Draft Sent **Paid** Void Export CSV

INVOICE ↓	CUSTOMER	STATUS ↓	DUE / STATE ↓	AMOUNT	ACTION
INV-0001 12 Jun 2025 <small>QT-0002 - this job</small>	Northgate Sports Club	• Paid	Paid	£570.00 inc. VAT	Receipt →

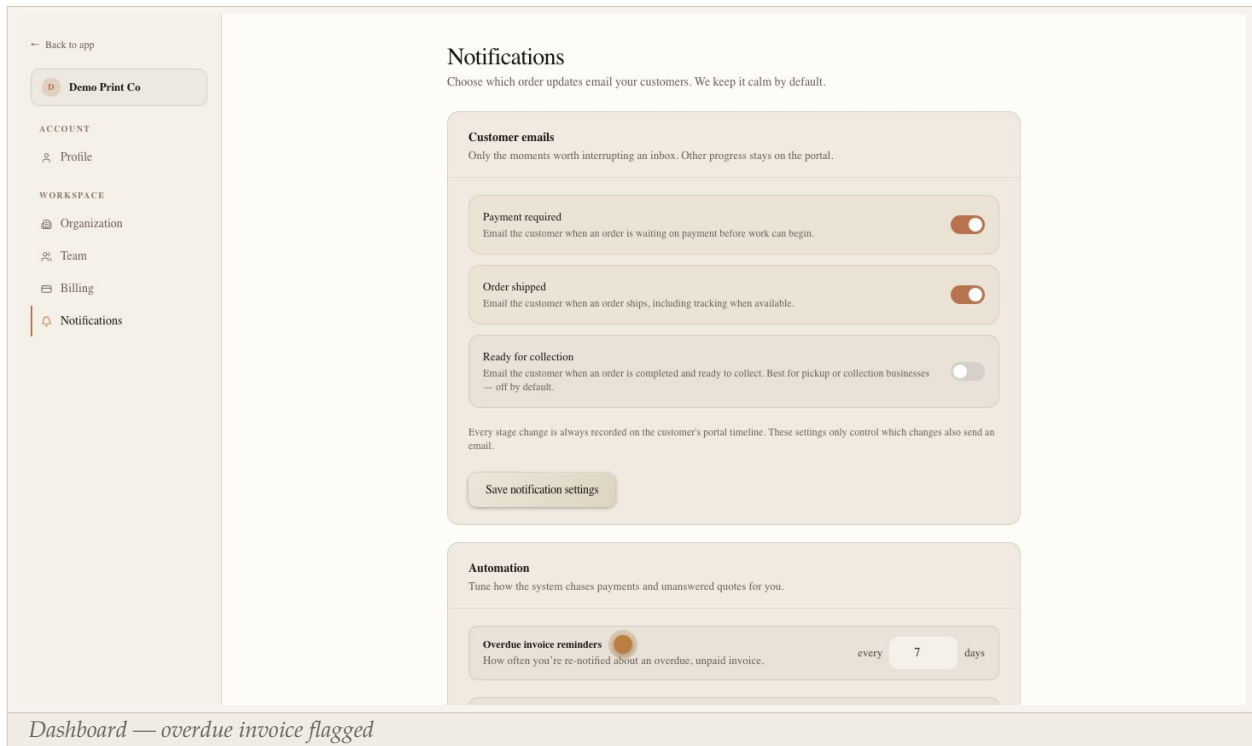
1. Invoices — filter by status: draft, sent, overdue, paid, void

Invoices list — filter by status

2. Open an invoice to edit line items  or set its status . Clean print view available.



3. **Overdue** invoices surface on the dashboard and trigger **automated reminders** 📧 on a tunable cadence.



4. **Export** invoices, quotes, or orders to CSV at any time.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan ->](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. Finish setup X

damantra

Demo Print Co
1 needs attention

Dashboard

ATTENTION
Messages awaiting reply 1

WORKFLOW
Customers
Quotes
Orders
Production
Invoices
Shipments

INSIGHTS
Reports

LIBRARY
Catalog

SUPPORT

Collapse

Invoices

1 total New invoice

OUTSTANDING

£0

none pending

OVERDUE

—

all current

PAID THIS MONTH

£570.00

collected

DRAFT PIPELINE

—

none

● Paid

All Draft Sent **Paid** Void Export CSV

INVOICE ↓	CUSTOMER	STATUS ↓	DUE / STATE ↓	AMOUNT	ACTION
INV-0001 12 Jun 2026 <small>QT-0002 - this job</small>	Northgate Sports Club	● Paid	Paid	£570.00 inc. VAT	Receipt →

4. Export invoices, quotes and orders to CSV

CSV export — invoices, quotes, or orders

VIDEO Filter to Overdue → mark paid → show the reminder cadence in Settings.

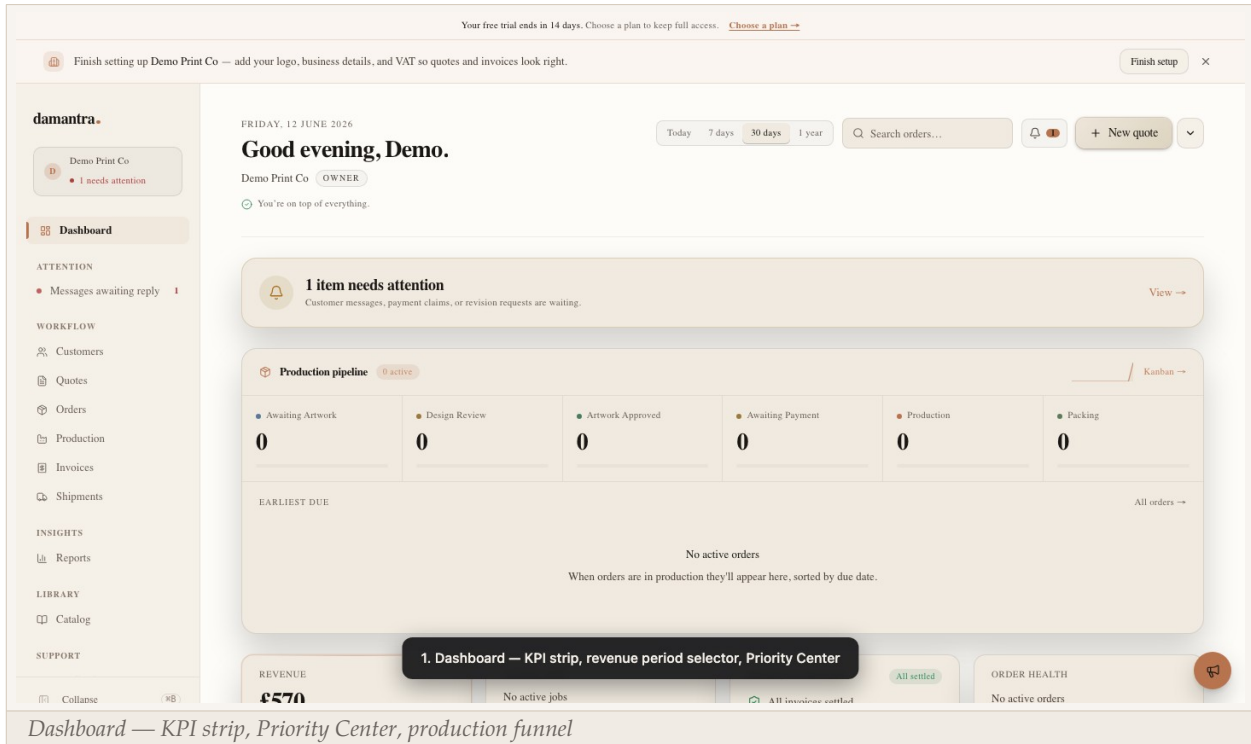
10. See how the shop is doing

Goal: read the health of the business at a glance.

DASHBOARD

 The **Dashboard** is always on:

- **KPI strip** — revenue (period selector), active jobs, financial and order health.
- **Priority Center** — severity-ranked queue: overdue, awaiting approval, ready to ship.
- **Production funnel** with bottleneck flags, plus a live activity feed.



The screenshot displays the Damantra dashboard for 'Demo Print Co'. At the top, it shows the date 'FRIDAY, 12 JUNE 2026' and a greeting 'Good evening, Demo.'. A notification bar indicates '1 item needs attention'. The main section is the 'Production pipeline', which is currently empty, showing zero items in each stage: Awaiting Artwork, Design Review, Artwork Approved, Awaiting Payment, Production, and Packing. Below the pipeline, there are three summary cards: 'REVENUE' showing £570, 'No active jobs', and 'ORDER HEALTH' showing 'No active orders'. A tooltip highlights the dashboard components: '1. Dashboard — KPI strip, revenue period selector, Priority Center'.

Revenue and financial cards are hidden from members without financial access.

REPORTS

 **Reports** (requires advanced-reports entitlement + financial access):

- Monthly revenue over 12 months.
- Quote funnel — win rate and view rate over 90 days.
- Average cycle time, on-time dispatch %, top customers.

Your free trial ends in 14 days. Choose a plan to keep full access. [Choose a plan ->](#)

Finish setting up Demo Print Co — add your logo, business details, and VAT so quotes and invoices look right. [Finish setup](#) X

damantra

Demo Print Co
1 needs attention

Dashboard

ATTENTION
Messages awaiting reply 1

WORKFLOW
Customers
Quotes
Orders
Production
Invoices
Shipments

INSIGHTS
Reports

LIBRARY
Catalog

SUPPORT
Collapse (98)

Reports

Revenue, quote conversion and production performance.
Last 12 months - quotes/production last 90 days

REVENUE (12 MO)

£570

paid invoices

QUOTE WIN RATE

100%

1 of 1 sent

AVG. CYCLE TIME

0d


order to dispatch

ON-TIME DISPATCH

100%

1 shipped

MONTHLY REVENUE



Jun 26

QUOTE FUNNEL - 90 DAYS

Sent	1
Viewed	1 100%
Accepted	1 100%
Declined	
Expired	0

TOP CUSTOMERS - 12 MONTHS

Northgate Sports Club	£570 1 inv
-----------------------	------------

Reports — revenue, quote funnel, cycle time

Without the entitlement this page shows an upgrade card.

VIDEO Tour the Priority Center, then open Reports for win-rate and cycle-time.

Putting it all together

The ten sections above follow one continuous story — the path every job takes through your shop:

Get set up → **add a customer** → **quote & accept** → **order & sign-off** → **get paid** → **production board** → **ship & invoice** → **communicate** → **invoices & reminders** → **analytics**.

That's quote-to-cash, end to end. Work through it once with a real job and the whole system clicks into place.

Need a hand? Send feedback from inside the app — we read every message.