EasyQuote
by NkazTech



USER MANUAL

# Quotes & invoices, made easy.

Everything you need to set up your business, send professional quotes and invoices, and get paid faster — on your computer or your phone.

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## 1 Welcome to EasyQuote

EasyQuote is an online quoting and invoicing tool built for South African small businesses, freelancers and tradespeople. There's nothing to install — it runs in your web browser on any computer, tablet or phone.

**Quote in minutes**
Pick a client, add your items and EasyQuote works out VAT, discounts and totals for you.

**Look professional**
Branded PDFs with your logo, colours, letterhead and banking details.

**Let clients say yes online**
Clients open a secure link, accept with their name, and you're notified straight away.

**Get paid faster**
Track payments, see what's overdue, send polite reminders and automate repeat invoices.

**How it fits together:**

Set up profile → Add client → Send quote → Client accepts → Convert to invoice → Record payment

## 2 Creating your account

You can sign up with an email address and password, or with your Google account.

### Sign up with email

1. Go to **easy-quote.nkaztech.com** and click **Get started free** (or **Create one free** on the login page).
2. Enter your business name, your name, contact details, a username and a password (at least 8 characters), then submit.
3. Open the verification email we send you and click the link. If it hasn't arrived after a few minutes, check your spam folder. If you try to log in before verifying, the login page offers a **Resend link** button.
4. Log in with your username or email and password.

### Sign in with Google

On the login page click **Continue with Google** and choose your Google account. Your email is already verified, so you can start straight away.

> **FREE TRIAL**
>
> Every new account starts with a **30-day free trial of Business** — all features, including letterhead and recurring invoices. No card needed. See section 13.

> **TIP**
>
> Forgot your password? Click **Forgot Password?** on the login page and we'll email you a reset link.

## 3 Setting up your business

Do this once before your first quote — everything here appears on your documents automatically.

### Business Profile

Open **Business Profile** from the menu and fill in:

| Section | What to enter |
|---|---|
| **Company / Business Details** | Business name, contact person, email, phone, address, registration number and website. |

| | |
|---|---|
| **VAT** | Your VAT number and **VAT Rate (%)**. If you're not VAT-registered, set the rate to **0** and no VAT will be added. |
| **Currency** | Currency symbol and code — **R / ZAR** by default. |
| **Banking Details** | Bank, account name, account number, branch code and account type — printed on invoices so clients can pay by EFT. |
| **Payment Instructions** | Anything extra, e.g. "Use the invoice number as your reference". |
| **Invoice Preferences** | Number prefixes for quotes and invoices (e.g. *Q-*, *INV-*), plus default notes and terms & conditions. |
| **Logo & Brand Colour** | Upload a JPG/PNG logo (max 2 MB) and pick the colour used on your documents. *(Premium)* |

### Letterhead

Open **Letterhead** to choose a design for the top of your documents and add an optional tagline (for example "Licensed electrical contractor since 2012"). You can also download it as a Word template. *(Business)*

## 4 Clients

Your client list is where EasyQuote gets the "Bill To" details for every document.

1. Open **Clients** and click **+ Add Client**.
2. Enter the client's name (required) plus company, email, phone, address and VAT number if you have them.
3. Optionally choose a **currency** for this client — useful if you bill some clients in USD, EUR or another currency. Leave it on the business default otherwise.
4. Click **Save**.

**GOOD TO KNOW**

You don't have to add clients in advance. While creating a quote, invoice or recurring invoice, choose **+ New client** next to the Client field — the client is saved and selected without leaving the page.

Each client row also has a **Statement** button that shows everything you've invoiced that client, what they've paid and what they still owe.

## 5 Products & services

Save the things you sell often so you can add them to a quote in one click.

1. Open **Products** and click **+ Add Product**.
2. Enter a name, an optional description and the unit price, then save.
3. When building a quote, use **⚡ Quick add from saved products** above the line items to drop it straight in.

## 6 Creating a quote

1. Click **+ Create new → Quote** in the menu (or **+** on your phone's bottom bar).
2. Choose the **client**, check the **issue date** and set the **due date** — for quotes this is shown to the client as *"Valid until"*.
3. Add **line items**: a description, quantity and unit price for each. Use **+ Add Item** for more rows or the quick-add list for saved products.
4. Add a **discount %** if you're offering one. VAT and totals are calculated automatically.
5. Check the notes and terms (pre-filled from your profile) and click **Create Quote**.

Your quote starts as a `Draft`. You can **Edit**, **Duplicate** or delete it at any time.

> **TIP**
> Use **Duplicate** to reuse a similar quote for a new client — just change the client and adjust the items.

## 7 Sending to your client

Open the quote and choose how you'd like to send it.

| Button | What it does |
|---|---|
| **Email to Client** | Sends a branded email with a link to view the document online. You can edit the subject and message first. |
| **Share Link** | Copies a secure link you can paste into WhatsApp, SMS or your own email. |
| **Download PDF** | Saves a PDF to attach or print yourself. |

| | |
|---|---|
| Print view | Opens a printer-friendly version. |

Once it's with your client, click **Mark as Sent** (emailing does this for you).

### What your client sees

The link opens a clean, mobile-friendly page showing your branding, the amount, the status and the full document. Your client can:

- **Accept** the quote by typing their name, or **decline** it;
- **Download a PDF** or print it;
- On invoices, tap **How to pay** and **copy** your account number and payment reference;
- **Contact you** by WhatsApp, phone or email with one tap.

## 8 When your client responds

- **Viewed:** when your client opens the link, the quote shows *"👁 Viewed 2 times · last 3 hours ago"*. If it says *"Not opened yet"*, it may be time for a follow-up.
- **Accepted:** the status changes to Accepted, you get an email, and the quote shows who accepted it and when.
- **Declined:** the status changes to Declined and you're notified by email.

If your client replies by phone instead, you can update the status yourself with **Accepted** or **Declined** on the quote.

### Turning a quote into an invoice

Click **Convert to Invoice**. A new invoice is created with the same client and items, and the quote is marked as accepted.

## 9 Invoices & payments

Create an invoice from a quote, or directly via **+ Create new → Invoice**. Invoices are sent exactly like quotes.

Draft → Sent → Partially paid → Paid or Overdue

### Recording payments

1. Open the invoice and click **Record Payment**.
2. Enter the amount, date and (optionally) the method and reference.

3. EasyQuote updates the balance. When the full amount is paid, the invoice switches to `Paid` automatically. Part-payments show as **Partially paid**.

If you've been paid in full outside EasyQuote, you can also click `Mark as Paid`.

### Overdue invoices & reminders

Unpaid invoices past their due date show as overdue on your dashboard and invoice list. On the invoice, click `⏰ Send Reminder` — EasyQuote picks a friendly, firm or final-notice message depending on how late the payment is. You can edit it before sending.

## 10 Recurring invoices

For monthly retainers, rent, subscriptions or maintenance contracts — set it up once and EasyQuote creates the invoices for you. *(Business)*

1. Open `Recurring` and click `+ New Recurring`, or open an existing invoice and click `🔁 Make Recurring`.
2. Choose the client and items, then the schedule — **weekly, monthly, quarterly or yearly**, every 1 or more periods.
3. Optionally schedule by **payment day** (e.g. "due on the 25th, sent 5 days before").
4. Turn on **auto-send** to email each new invoice automatically, or leave it off to review drafts first.

From the list you can `Edit`, `Pause` / `Resume`, or `Run now` to generate the next invoice immediately.

## 11 Dashboard, activity & statements

- **Dashboard** — your totals at a glance: quotes, invoices, clients, money owed, paid and overdue, a 6-month revenue chart and how long invoices have been outstanding. Tap any card to see the matching list.
- **Activity** — a timeline of everything that happened: documents created, emailed, viewed, accepted, payments recorded and more.
- **Statements** — from `Clients → Statement`, a printable summary of a client's invoices, payments and balance.

## 12 Using EasyQuote on your phone

EasyQuote works in your phone's browser — no app to install.

- The **bottom bar** takes you to Home, Quotes, Invoices and Clients. The round **+** button creates a new quote, invoice, client or product.
- Tap ☰ at the top left for the full menu.
- Lists turn into easy-to-read cards with large buttons.

> **TIP**
> Add EasyQuote to your home screen: in Chrome tap ⋮ → **Add to Home screen**; in Safari tap **Share** → **Add to Home Screen**.

## 13 Plans & free trial

Every new account gets a **30-day free trial with everything in Business**. Settings and the Plans page show how many trial days are left. When the trial ends you move to Free unless you choose a paid plan — nothing you created is lost.

| Feature | Free<br>R0 | Premium<br>R50/month | Business<br>R100/month |
|---|---|---|---|
| Unlimited quotes, invoices & clients | ✓ | ✓ | ✓ |
| Email, share links & PDF downloads | ✓ | ✓ | ✓ |
| Online acceptance & view tracking | ✓ | ✓ | ✓ |
| Payments & reminders | ✓ | ✓ | ✓ |
| Dashboard & revenue chart | ✓ | ✓ | ✓ |
| Your company logo on documents | — | ✓ | ✓ |
| Custom brand colour | — | ✓ | ✓ |
| No "Generated with EasyQuote" footer | — | ✓ | ✓ |
| Branded letterhead + Word template | — | — | ✓ |
| Recurring invoices | — | — | ✓ |

Choose or change your plan any time: open `Settings` and click `Choose a plan` (or `Upgrade`). Payment is handled securely by PayFast; monthly billing, cancel any time. Features marked *(Premium)* or *(Business)* in this manual need that plan.

## 14 Account & security

- Change your password under **Settings → Change Password**.
- For your security you're logged out automatically after a period of inactivity.
- Share links use long, random codes that can't be guessed. Only send them to the client concerned.
- Your data is private to your account — other EasyQuote users can't see your clients or documents.

## 15 Troubleshooting & FAQ

| Question | Answer |
|---|---|
| I didn't get the verification email. | Check spam/junk, then try to log in — the login page offers a **Resend link** button. Make sure the address is spelled correctly. |
| My client says they didn't get my email. | Ask them to check spam, or send the **Share Link** by WhatsApp instead. |
| I'm not VAT-registered. | Set **VAT Rate** to 0 in Business Profile. No VAT will be added. |
| Can I change a quote after sending it? | Yes — click **Edit**. Your client sees the updated version the next time they open the link. |
| A client paid part of an invoice. | Use **Record Payment** with the amount received. The invoice shows "Partially paid" and the remaining balance. |
| A recurring invoice didn't appear. | Check the schedule is **Active** and the next-run date. You can always click **Run now**. Recurring invoices need Business — if your trial ended or you're on Free or Premium, schedules are paused until you upgrade. |
| What happens when my free trial ends? | You move to Free. Your quotes, invoices and clients stay. Choose Premium or Business on the Plans page to keep the extra features. |
| Can I bill a client in dollars? | Yes — set that client's currency when you add or edit them. |

## 16 Getting help

Use **Help & Feedback** in the app to send us a message, or contact NkazTech directly:

| EMAIL | PHONE / WHATSAPP | WEBSITE |
| --- | --- | --- |
| info@nkaztech.com | +27 74 834 9879 | www.nkaztech.com |

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