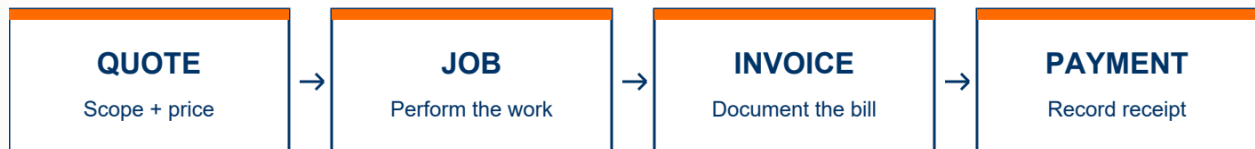


Welcome to Quotes2Invoices

EARLY ACCESS BETA / QUICK START GUIDE

Quotes2Invoices (Q2I) helps contractors and small service businesses organize customers, prepare quotes, turn accepted work into jobs, create invoices and record payments.



Use Catalog for reusable items, receipt capture to extract candidate items for review, and PDF sharing to send business documents through Android. Start with sample information before relying on the beta for live work.

Important: protect your business records

Q2I is Early Access software undergoing real-world testing. Do not use this beta as the sole copy of critical business records.

Q2I is currently designed around local device storage. Android application backup is disabled for Q2I. Do not assume that records will follow you to another phone or return after uninstalling the app or clearing its storage.

Keep important information, PDFs and exports separately. This beta does not provide cloud synchronization or cloud backup. A JSON export is not a one-tap restore system; no import/restore control was found in the reviewed build.

Use this guide in order

Install and set up (page 2). Add customers and reusable items (page 3). Review receipt capture (page 4). Save your first quote (page 5). Follow the quote-to-payment workflow (page 6). Find and export records (page 7). Run the beta checklist and send feedback (page 8).

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Install and set up

START WITH THE OPERATOR-APPROVED BETA APK

- 1 Use the Quotes2Invoices Early Access Beta download supplied through castleoakai.com. Check that you are on the expected website and downloading Q2I, not an advertisement or an unrelated app.
- 2 Open the downloaded APK from your browser or Downloads. Android may ask whether that browser or file manager can install unknown apps.
- 3 If you recognize and trust this download, allow installation for that specific source only. Keep Play Protect and other device protections enabled. If Android blocks the file or gives an unexpected warning, stop and ask the beta provider for help.
- 4 Complete installation and open Quotes2Invoices. You can turn off that source-specific installation permission afterward. Wording varies by Android version and phone.
- 5 On Home, tap MANAGE BUSINESS PROFILE, or open More > BUSINESS PROFILE. Enter your business name, email address and phone number, then tap SAVE.

Before your first invoice

Review the business details carefully. New invoices capture these details when they are created. Changing Business Profile later does not rewrite the historical identity on an existing invoice.

Defaults and document numbers

Open More > APP SETTINGS & EXPORT. You can set default tax, quote terms/notes, invoice notes, quote and invoice prefixes, and the next document numbers. Tap SAVE after changes. Existing document numbers are not renumbered.

For an update, use the approved replacement APK over the existing installation. Do not uninstall or clear storage to troubleshoot: that can remove local records. If an update fails, retain the installed app and report the message.

Customers and Catalog

SAVE REUSABLE DETAILS BEFORE YOU QUOTE

Add or select a customer

Open Customers and tap the add control. Enter the name and available phone/email details, then SAVE. You can also use ADD NEW CUSTOMER from New Quote. To use an existing customer, tap their name in the quote editor; the selected customer appears with a check mark.

Tap a customer row to edit their details. Q2I retains customers linked to quotes or jobs instead of deleting those linked records. If deletion is refused, read the message and keep the customer record.

Build a reusable Catalog

- 1 Open More > CATALOG / SAVED ITEMS.
- 2 Tap CREATE FOLDER, enter a useful group name such as Labor or Materials, and tap CREATE.
- 3 Open the named folder and tap the + Add Item control. Enter Item Name and Unit Price (\$); add Category or Description if useful, then SAVE.
- 4 Use View All Items or a folder to find saved items. Search items by name and use EDIT to correct an item.

Current beta limitation: the Add Item control in All Items does not open the item form in the reviewed source. Add manual Catalog items inside a named folder instead. Report this if it affects your work.

One-off work does not need a Catalog entry

In New Quote, choose ADD ITEM > NEW LINE ITEM for a custom description, unit price and quantity. Use SAVED ITEM for reusable Catalog entries. A custom quote line is not automatically a new Catalog item.

Treat reusable prices as starting points. Check the price and quantity on each quote before saving or sharing it.

Turn a receipt into Catalog items

CAMERA / GALLERY → OCR → REVIEW / EDIT → CATALOG

Receipt capture proposes item data from a photo. OCR is text recognition, not a guarantee that an item, price or quantity is correct. Always compare the results with the original receipt.

- 1 Open Catalog and tap SCAN RECEIPT.
- 2 Choose TAKE PHOTO, or CHOOSE FROM GALLERY for an existing image. Grant camera access if you choose to take a photo.
- 3 Use a clear, well-lit image with the receipt in focus. Wait while Q2I analyzes it.
- 4 On REVIEW RECEIPT, check each item description, UNIT PRICE and QTY. Correct mistakes and remove entries you do not want. Pay extra attention to LOW CONFIDENCE - PLEASE VERIFY notices.
- 5 Tap IMPORT [number] ITEMS. Select a destination folder, or UNFILED, then tap SAVE ITEMS.
- 6 Return to Catalog and check the saved entries. You can use them through SAVED ITEM in your next quote.

If the result is not usable

A denied camera permission, an unreadable image, an OCR failure and a successful scan with no detected items are different outcomes. Read the message, try a clearer image or use gallery selection where appropriate. You can add needed items manually inside a named Catalog folder.

Check unit price versus extended line total, decimal points and quantities. Remove tax, totals, discounts or other receipt text if it has been mistaken for a product. Importing a receipt creates Catalog items; it does not record a payment or provide expense accounting.

Camera/gallery behavior is part of the beta acceptance checklist. A written workflow is not a claim that every phone or receipt layout has passed testing.

Create, save and review a quote

NEW QUOTE IS YOUR MAIN STARTING POINT

- 1 From Home, tap NEW QUOTE. Select an existing customer or use ADD NEW CUSTOMER.
- 2 Tap ADD ITEM. Choose SAVED ITEM, or NEW LINE ITEM for custom work.
- 3 For a new line, enter DESCRIPTION and UNIT PRICE (\$), check QUANTITY, then tap ADD LINE ITEM. Repeat for additional work. Tap an existing quote line to update or remove it.
- 4 Review MARKUP %, TAX %, DISCOUNT (\$), and CUSTOMER NOTES / TERMS. Verify the pricing summary and TOTAL DUE.
- 5 Tap SAVE DRAFT. The control is enabled only when a customer, at least one line and valid adjustments are present. If SAVE FAILED appears, remain in the editor and retry or report the problem.
- 6 In Quotes, tap the saved row to reopen Quote Review. Confirm the quote number, customer, version, lines and total before sharing.

After saving a draft

Q2I keeps the saved quote open so you can review it or continue working. When finished, tap the back arrow to leave the quote, then return to Home or navigate elsewhere. Staying on the quote is intentional in this Early Access test build.

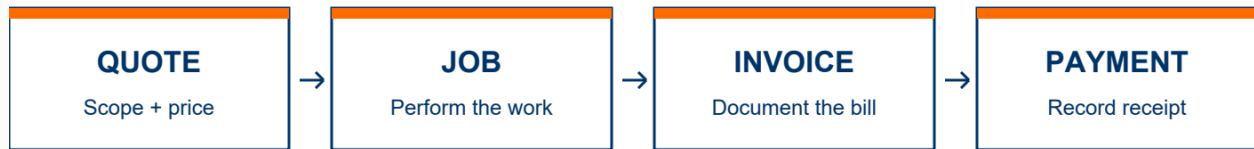
Revisions: current beta limitation

The reviewed build contains a revision-saving route, but its current Quotes screen does not expose a working Revise action. Reopening a quote shows its review screen, not an editable revision. Report this limitation; do not assume that sent quotes can be revised from the current UI.

When your customer approves the work, follow MARK SENT → ACCEPT → CONVERT TO JOB on Quote Review. MARK SENT records a status; it does not send the PDF automatically. ACCEPT records your action in Q2I, not an online signature.

From quote to payment

THE CORE WORKFLOW



Quote: review, share and record approval

Open the quote and use Share to generate a quote PDF. Choose an Android destination, inspect the document and send it as appropriate. Tap MARK SENT. After the customer approves, tap ACCEPT, then CONVERT TO JOB.

Job: track and finish the work

Open the Jobs bottom tab; the screen title is OPERATIONS. For active work, use FINISH when complete, or PAUSE and RESUME as needed. A scheduled job can show START. After completion, tap INVOICE to generate its invoice.

Invoice: preserve the issued details

In OPERATIONS, scroll to INVOICES & PAYMENTS. The invoice captures business/customer identity, line items, prices, adjustments, totals, notes and terms at creation. Later upstream edits do not rewrite those captured invoice details. Recorded payments and the remaining balance can still change.

Use the invoice Share icon to generate its PDF. Save/open the file with an available Android destination to inspect every page: identity, number/date, lines, totals, notes/terms and page breaks. Tap MARK SENT after sending; it is a status action, not automatic delivery.

Payment: record money you have received

Tap RECORD PAYMENT. Enter the amount received, choose the method, add optional reference/notes, and tap RECORD. A partial payment changes the invoice to PARTIAL. Recording the full remaining balance changes it to PAID. Q2I records payments manually; this action does not charge a customer.

Practice example: on a \$100 invoice, record \$40, verify \$60 remains, then record \$60 and verify PAID. Check the PDF before sending, including long or multipage documents. PDF sharing depends on the compatible apps installed on your phone.

Find and preserve your work

KNOW WHERE TO LOOK

Home

NEW QUOTE starts a quote. Recent Activity links to business records. In the corrected source, Awaiting counts DRAFT and SENT quotes; accepted quotes leave that count. Active Jobs counts ACTIVE, IN_PROGRESS and SCHEDULED jobs. Total Due is the unpaid invoice balance.

Quotes and Operations

Quotes lists saved quotes and opens Quote Review. The Jobs tab opens OPERATIONS, where job actions and INVOICES & PAYMENTS are grouped. Use the labeled actions beneath job and invoice rows; those rows are not separate detail screens in the reviewed UI.

Catalog and Search

Catalog lives under More > CATALOG / SAVED ITEMS. Use folders or View All Items to browse. The Quotes search icon opens Search; Home's VIEW ALL also opens it. Search can find customers, quotes, jobs, invoices and Catalog items. Some results take you to the relevant list rather than directly to the matching record.

Export important records

- 1 Open More > APP SETTINGS & EXPORT.
- 2 Tap EXPORT DATABASE (JSON), then choose an appropriate destination in Android's sharing options.
- 3 Confirm the exported file exists outside the app. Retain important PDFs and original business records separately as well.

Exports contain business information. Choose storage and sharing destinations carefully. Do not send a full database export with an ordinary bug report. No cloud backup, synchronization or in-app restore is promised by this guide.

The draft-count correction is implemented and automated tests passed, but its final Samsung 0→1 physical retest remains pending at this guide's preparation. If your build behaves differently, record the steps and report it.

Beta checklist and support

TEST REAL TASKS, NOT JUST THE FIRST SCREEN

- Create a customer; save a quote and reopen it. Check prices, quantities, adjustments and totals.
- Check whether revision controls are available. In this reviewed build they are not exposed; report that gap rather than treating revision as passed.
- Accept work, create a job, finish it and create an invoice. Record partial and full payments.
- Open/share quote and invoice PDFs. Inspect all pages, including long item lists and notes.
- Add reusable items inside a Catalog folder. Try both receipt camera and gallery paths; correct OCR before importing.
- Search for records. Close and reopen Q2I and check that saved work and payment status remain.
- Tell us what is confusing, what information is missing, and whether the workflow is useful on an actual job.

Send a useful bug report

Include your phone/device model, what you were trying to do, the steps leading to the problem, what you expected and what happened instead. Add a screenshot if useful; hide customer details and other sensitive information first. Include any visible error message.

Saved-quote navigation: after saving, Q2I keeps the quote open rather than returning to Home. Did this feel natural, or would you prefer to return somewhere else?

Bug: something fails or contradicts its intended function. UX feedback: it works, but you prefer a different interaction. Feature request: functionality Q2I does not currently provide. Preferences help inform beta decisions; they are not promises of future changes.

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