

HELP & SUPPORT GUIDE

Frequently Asked *Questions*

Everything you need to run your business from WhatsApp — quotes, invoices, payments, reports, and what to do when something isn't working.

01

Getting Started

The basics of using MzansiQuote

Q. How do I start using MzansiQuote?

Send any message to our WhatsApp number. You'll be offered two paths: a quick **demo quote** you can try in under 2 minutes, or a **10-minute full setup** where we collect your business details, rate card, and (optional) logo so every quote and invoice comes out fully branded as yours.

Q. Do I need to download an app?

No. MzansiQuote lives inside WhatsApp. If you have WhatsApp, you have MzansiQuote — no app stores, no installs, no logins.

Q. Can I try it before I set up my business?

Yes. Pick the **Try It Now** option on your first message. You'll get a sample branded PDF quote back in under 2 minutes — no rate card or logo required. When you're ready, just ask for full setup.

02

Creating a Quote

From text message to branded PDF in 2 minutes

Q. How do I create a quote?

Send a short WhatsApp message describing the job — the customer's name and number, what you'll do, and the price if you know it. MzansiQuote turns it into a professional PDF quote for you to review. Once you approve it, the branded PDF comes back to you and **you forward it to your customer on WhatsApp** — that way it lands in your existing chat with them, from your number.

Q. The quote draft is wrong — can I fix it?

Yes. Don't tap approve. Just reply telling us what's wrong (e.g. "change the geyser to 200L" or "the labour is R850 not R500") and we'll redo the draft. **Nothing is ever sent to the customer until you approve it.**

Q. How will I know when my customer accepts the quote?

Every quote PDF includes an **Accept Quote** link. The second your customer taps it, you'll get a WhatsApp message from us confirming the acceptance.

Q. The quote flow is stuck — what do I do?

Type **reset** and start the quote again. Your customers, rate card, and past quotes are all safe.

03

Creating an Invoice

Professional tax invoices, ready for EFT

Q. How do I create an invoice?

Tell MzanziQuote the job is done and what the customer owes — e.g. "done at 14 Main Road, charge Mr Dlamini R4,500 for the geyser install". We'll generate a compliant PDF tax invoice with your banking details and a due date. Review it, approve it, and **forward it to your customer on WhatsApp** from your existing chat with them.

Q. Can I send an invoice without creating a quote first?

Yes. If you've already agreed the price on-site, skip the quote step entirely. Just tell us to create an invoice and we'll go straight there.

Q. My invoice has the wrong amount or customer — can I edit it before sending?

Yes. At the review step, reply with what needs to change and we'll redo the draft. Only tap approve when it's perfect.

Q. The invoice flow won't finish or something is stuck.

Type and start the invoice again.

04

Marking Invoices as Paid

Keep your books up to date with one tap

Q. How do I mark an invoice as paid?

Once the customer pays by EFT, reply "mark paid" and we'll show you a list of outstanding invoices. Tap the one that was paid and it's recorded.

Q. I forgot to mark an invoice paid from last week — can I go back?

Yes. Ask for your "outstanding invoices" at any time. Scroll to the one that's been paid and confirm — the date you mark it is the date it's logged, so note the actual payment date in the reply if it matters.

Q. I accidentally marked the wrong invoice as paid.

No problem. Reply "undo last payment" or type and then "unpaid invoices" to correct it.

Q. The confirmation prompt isn't responding.

Type and try again. Payments already recorded stay recorded.

05

Monthly Report

Your month, summarised in one message

Q. What's in the monthly report?

A simple summary of the month: how many quotes you sent, how many were accepted, how many invoices you issued, how much was paid, and how much is still outstanding. You can share it with your bookkeeper or accountant directly from WhatsApp.

Q. How do I get my monthly report?

The report is **on-demand** — it doesn't arrive automatically. Just reply "monthly report" at any time and we'll send it through. Pull one whenever you need a snapshot, or at month-end when your bookkeeper or accountant needs a summary.

Q. The monthly report won't come through.

Type and ask for the report again.

06

Editing Your Business

Update your details, rate card, logo, and banking

Q. How do I update my business name, phone number, or email?

Reply "edit business" on WhatsApp. You'll see a menu with each field you can update. Pick one, send the new value, and confirm.

Q. How do I change my rate card or add a new service?

Reply "edit rate card". You can add, change, or remove any service and its price. New quotes and invoices will pick up the changes automatically; documents already sent are not affected.

Q. How do I update my logo or banking details?

Reply "edit business" and choose the right field. For a new logo, send through the image file when prompted. For banking, double-check the account number before confirming — it goes onto every invoice you issue.

Q. The edit flow is stuck or the changes aren't saving.

Type and try again.

If you're stuck — *let's get you unstuck.*

MzanziQuote is built to feel like a colleague on the other end of WhatsApp. Most of the time it just works. When it doesn't, the golden rule below will get you back on track in under a minute — it solves nine out of ten problems.

THE GOLDEN RULE

Stuck? Type *"reset"*

Whenever something isn't working the way you expect — a quote won't send, an invoice won't finish, a report won't come through, or your business details won't save — send the word **reset** to MzanziQuote on WhatsApp. This clears the current conversation and takes you back to the main menu. **No data is lost. No customers are deleted. No quotes or invoices disappear.** You can always try again.

When to use *reset*

If any of the flows below get stuck halfway, type **reset** on WhatsApp to start over:

Creating a quote — the draft won't finish, or you want to start from scratch

Creating an invoice — the flow freezes or a field goes wrong

Marking an invoice as paid — the confirmation prompt isn't responding

Pulling your monthly report — the report doesn't come through

Editing your business details — the update isn't saving or you picked the wrong field

Still stuck after reset? You'll find the support channel in the MzanziQuote WhatsApp profile — tap our name at the top of your chat to open it.

— *When in doubt, type reset.* —

YOUR OFFICE IN YOUR POCKET