Quote 365

USER MANUAL

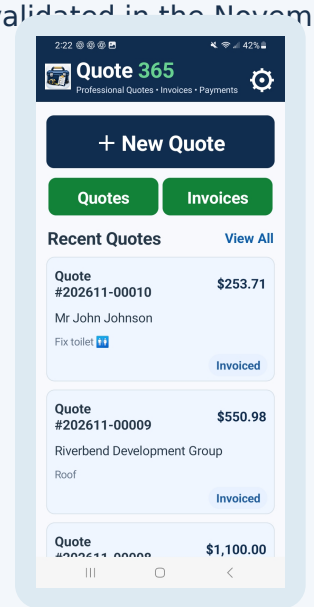
Quotes • Invoices • Square Payments • Reporting

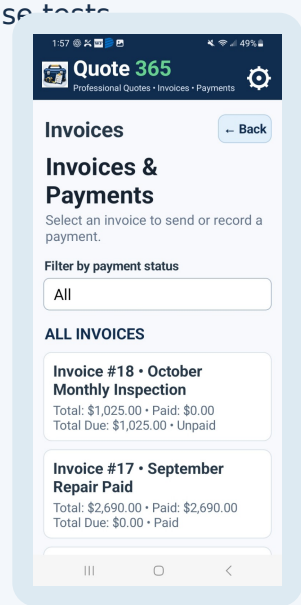
Android Edition | Release candidate v0.4.9.58 | November 2026

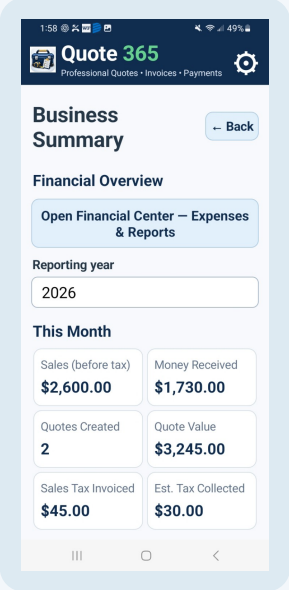
Create Quote › Send PDF › Approval › Invoice › Payment › Reports

Designed for real work, from estimate to payment.

Use Quote 365 to build professional quotes, send customer-ready PDFs, collect verified Square deposits and invoice payments, and monitor business results. This guide covers the workflow validated in the November 5 release tests.







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01 Start here

Getting around Quote 365

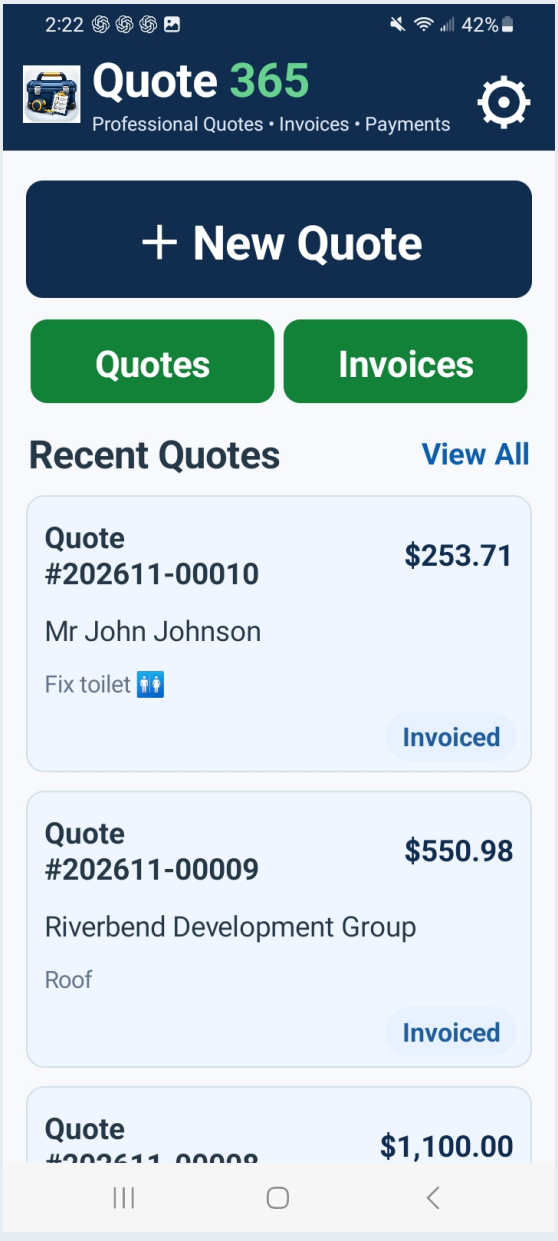
Quote 365 puts the daily quoting workflow directly on the Home screen.

- New Quote — Create an estimate, select a customer, and add materials or labor.
- Quotes — Search and open saved quotes, follow their status, and send documents.
- Invoices — Review invoice totals, record payments, and follow outstanding balances.
- Gear menu — Open Customers, Price Book, Business Summary, Financial Center, Square Payments, and Settings.

Status colors

Blue indicates open or pending work. Green indicates approved or paid results, depending on the screen.

Core path: Create Quote → Send PDF → Record approval or receive a verified Square deposit → Convert to Invoice → Collect the balance → Review business results.



Home: daily actions

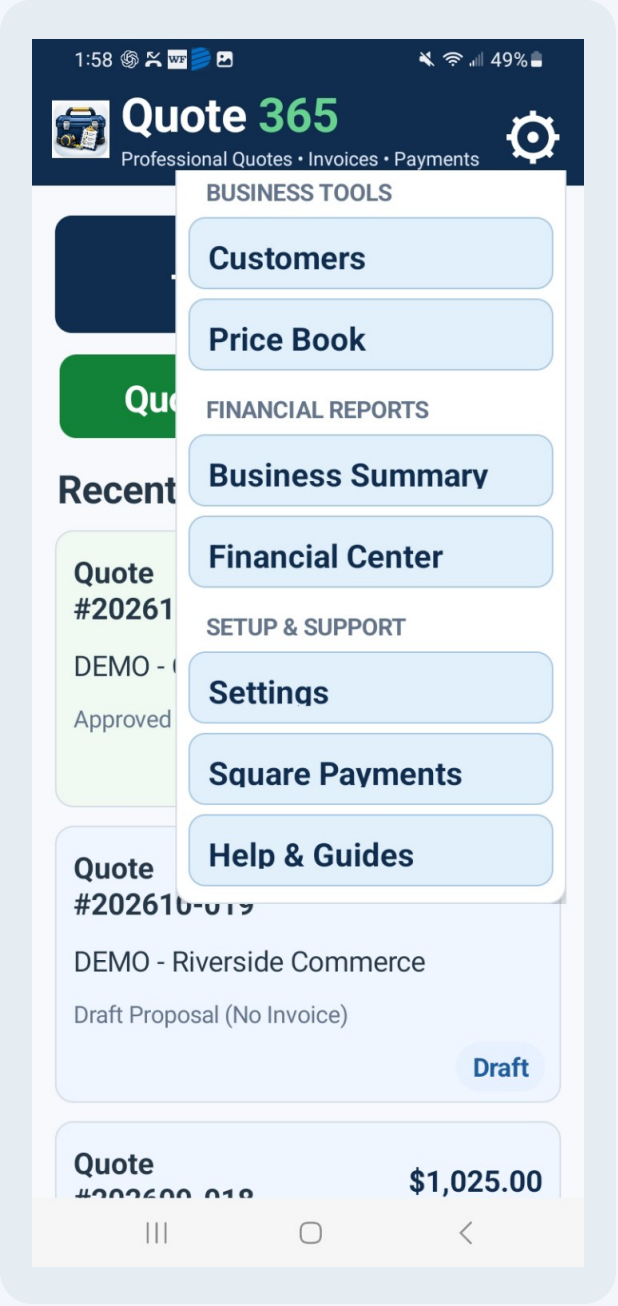
02 Tools and navigation

The main actions stay simple; advanced tools live under the gear.

Open the gear on the Quote 365 banner when you need business setup, reporting, or help.

- Customers — Keep client names, addresses, contacts, and other customer details organized.
- Price Book — Maintain reusable product and service entries with prices and optional internal costs.
- Business Summary — See sales, collections, quote activity, taxes, materials, and labor metrics.
- Financial Center — Open expense tracking and financial reports.
- Square Payments — Connect your merchant account and sync confirmed online payments.
- Settings — Manage business profile, tax defaults, exports, backups, and support.

The app works with locally saved business records. Create regular backups; reinstalling or replacing your phone without a valid backup can put records at risk.



Gear menu: business tools

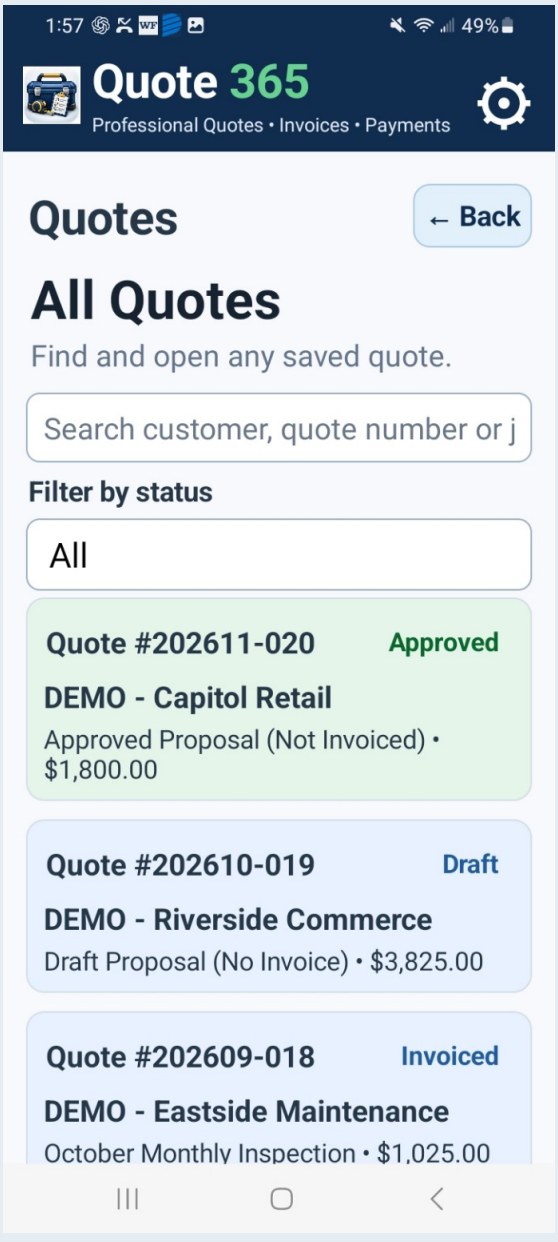
03 Create a quote

Enter the customer, scope, priced items, and totals.

Start on Home with + New Quote; choose a customer or add a new one.

- Describe the work — Enter a recognizable title and any job or scope details.
- Add items — Use the Price Book for repeat items or add custom materials and labor.
- Review pricing — Confirm quantity, unit price, labor, markup, taxes, discounts, and the final total.
- Save and search — Open Quotes to find a quote by customer or quote number; filter by status.
- Send a PDF — Choose to send the quote without online payment or include a Square deposit link.

Approval options: record a customer decision manually, or let a verified Square deposit approve the quote automatically after synchronization. Sending a PDF by itself does not prove it was delivered.



Quotes: searchable work list

04 Send a deposit request

The approved payment flow in v0.4.9.58.

You can request 25%, 50%, 100%, or a custom deposit amount on an eligible quote.

- Connect Square — Go to Settings → Square Payments and connect your own merchant account.
- Choose a deposit — On the quote, select Send Quote with Deposit Link and review the amount.
- Send the quote PDF — Use the phone sharing or email options to send the document with its Pay Deposit button.
- Understand OPEN — Awaiting payment (OPEN) means the checkout exists but payment has not been verified.
- Resend safely — Resend Quote with Existing Deposit Link reuses the same active URL; it does not create another request.
- Verify receipt — After the customer pays, select Check for Payments. The verified Square deposit can change the quote to Approved.

Tested: successful deposit → Square synchronization → quote Approved; deposit carries onto the invoice. The deposit is a payment, not merely a promise to pay.

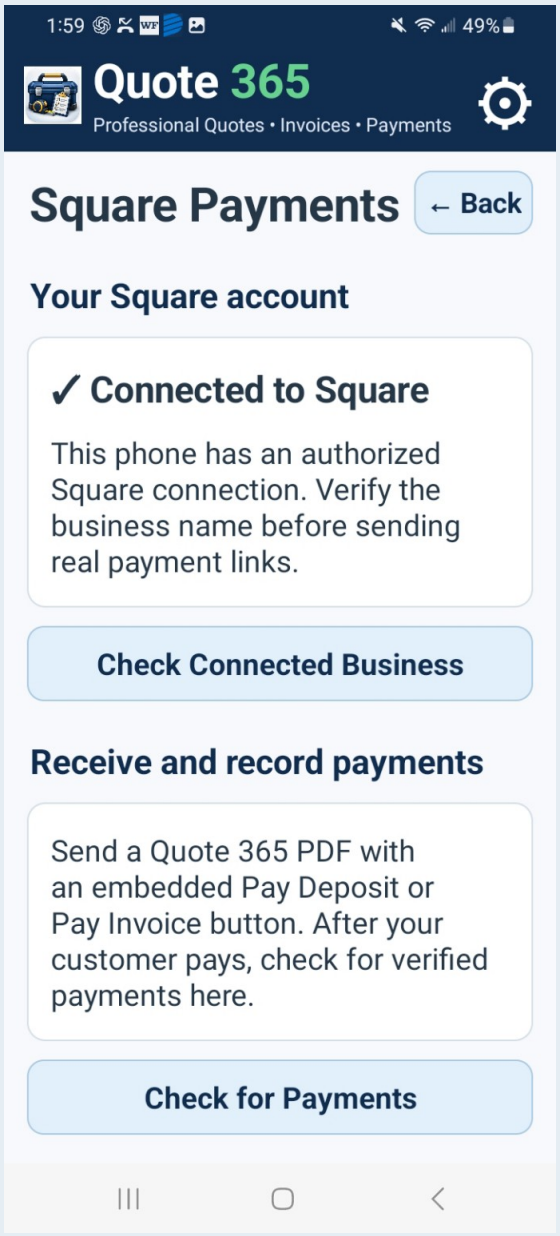
05 Square account and syncing

Merchant verification before payment status changes.

Square processes the payment. Quote 365 records verified transactions against the correct quote or invoice.

- Connect to Square — Open Square Payments from the gear; authorize your own merchant account.
- Confirm the business — Use Check Connected Business before generating real payment links.
- Share the correct PDF — Deposit links belong on quotes; outstanding-balance links belong on invoices.
- Check for Payments — After a customer pays, synchronize and review the relevant record.
- Repeat safely — Rechecking should not record the same completed Square payment twice.

Important: An OPEN link is not proof of receipt. Do not mark an invoice Paid based only on a link, an email, or a customer screenshot.



Square: connected account and sync

06 Manage payment links

Cancel the correct link without changing unrelated requests.

Payment links can be canceled separately for individual quotes and invoices.

- Open the record — From the relevant quote or invoice, choose Manage Payment Links.
- Check first — Use Check for Payments if the customer may have paid already.
- Cancel deliberately — Choose Cancel Payment Link and review the selected amount and confirmation.
- Understand the impact — The selected Square checkout is disabled. Other quote and invoice links remain unchanged.
- Replace only when needed — Once the unpaid link is canceled, generate a new payment request and send a fresh PDF.

What cancellation does not do

Canceling a checkout does not refund completed payments or delete the customer’s transaction history. Previously emailed PDFs containing that link will point to a disabled checkout.

Avoid duplicates: if the active link is still correct, use Resend Quote/Invoice with Existing Payment Link rather than creating a replacement.

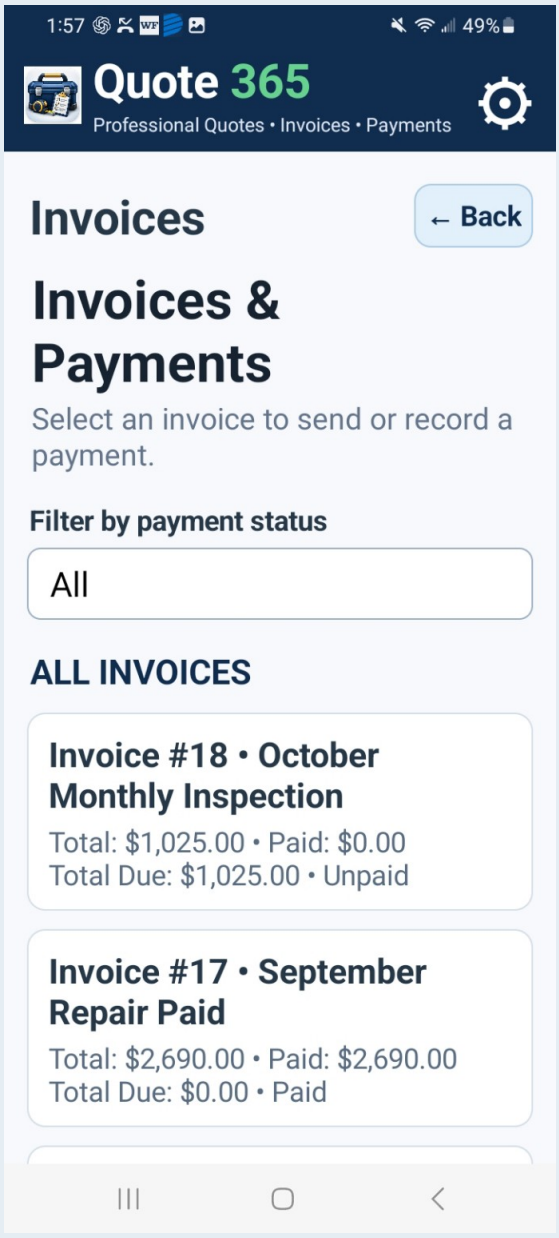
07 Convert to invoice

Carry forward the verified deposit and collect any balance.

Once a quote is approved, turn it into an invoice while preserving its priced items and payment history.

- Open approved quote — Confirm the status is Approved and any Square deposit is recorded.
- Convert to Invoice — Use the quote's invoice action; the verified deposit is applied against the invoice.
- Confirm the balance — Check invoice total, deposit/paid amount, and outstanding amount.
- Send the balance link — Select Send Invoice with Payment Link, or send the invoice PDF without an online checkout.
- Synchronize final payment — After checkout completes, Check for Payments. A fully settled invoice should read Paid.

Example: $400 quote with a verified $100 deposit → invoice total $400, deposit paid $100, remaining balance $300. Use the actual app totals as authoritative.



Invoices: payment status list

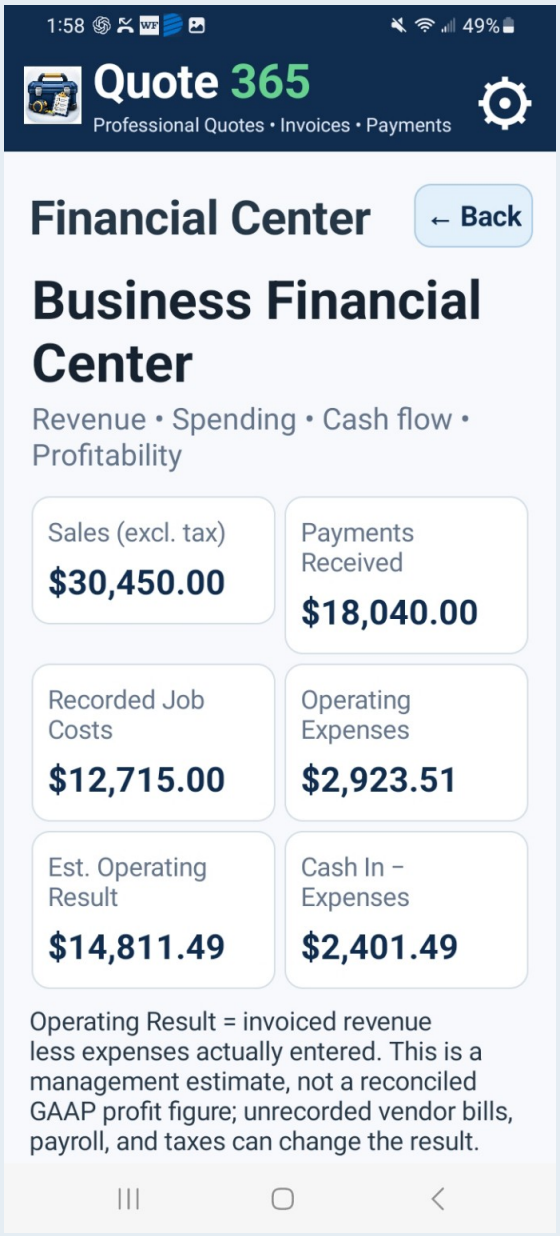
08 Financial Center

Business management reports based on recorded data.

Financial Center offers accounting-style views built on the entries stored in Quote 365.

- Sales and receipts — Review invoiced sales and recorded customer payments separately.
- Job costs — Enter material and labor costs to support margin and profitability estimates.
- Expenses — Record operating expenses with useful categories and supporting details.
- Reports — Review profit and loss, receivables, and other available reporting views.
- Check dates — Make sure you select the reporting year or time period intended.

Accounting note: Reports depend on complete, accurate records and should not be treated as a reconciled tax return or audited financial statements.



Financial Center: business metrics

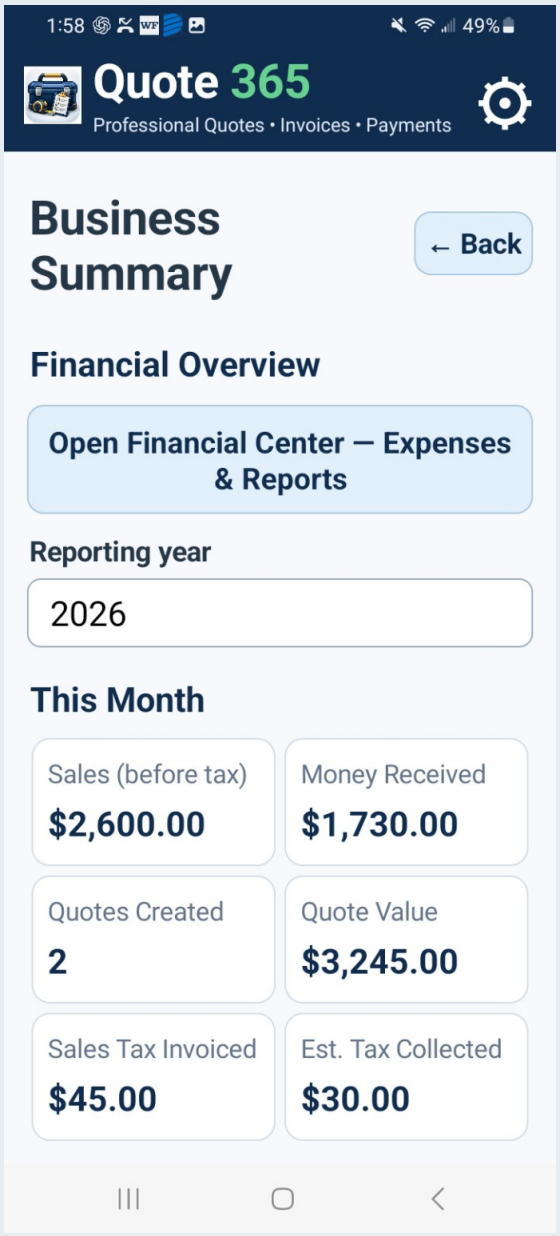
09 Business Summary

A quick view of sales, payments, and workload.

Use Business Summary when you want an at-a-glance picture of business activity.

- Year selector — Review the correct reporting year before comparing totals.
- Sales and collections — Invoiced sales and payments received are different measures.
- Quotes — Monitor quote counts, values, and approval results.
- Sales tax — Review estimated billed and collected tax totals, where applicable.
- Materials and labor — Recorded costs are only as complete as the data entered.

Missing cost data: If a price-book item has no recorded internal unit cost, historical margin estimates may be incomplete. Review costs rather than assuming blanks mean zero.



Business Summary: annual view

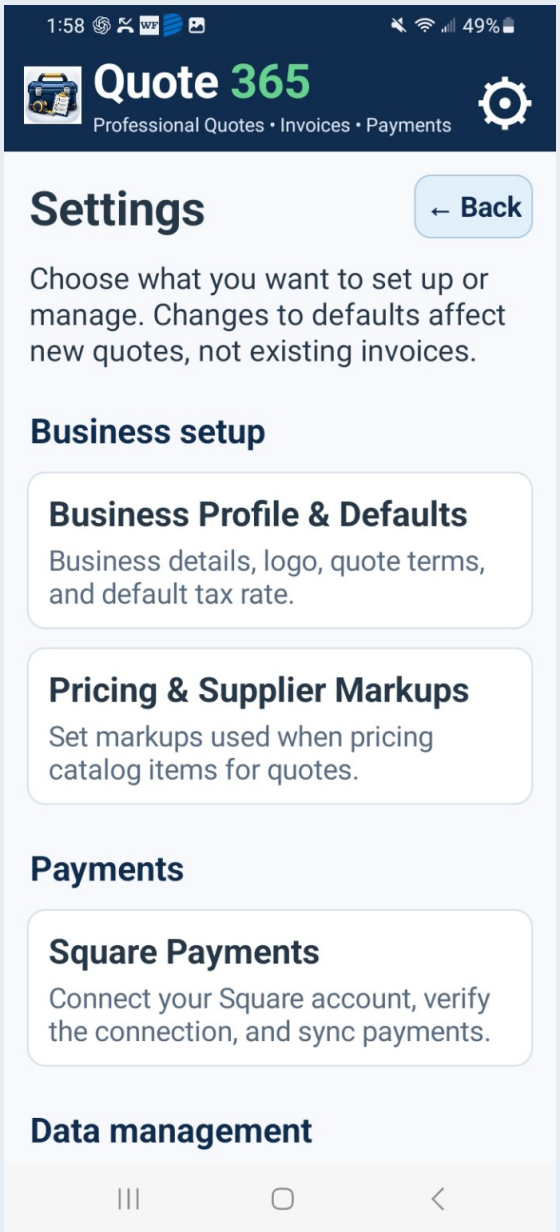
10 Settings and backups

Protect records and configure company defaults.

Open Settings from the gear menu to adjust business details, data management, and app preferences.

- Business Profile — Set company name, contact details, logo, default terms, and applicable tax preferences.
- Pricing rules — Keep internal supplier costs and pricing rules accurate.
- Export and back up — Create a full backup, keep copies in a safe place, and verify access before an upgrade.
- Restore thoughtfully — A restore may replace locally stored records; confirm that you are using the correct backup.
- Subscription and help — Review your account, trial, help screens, feedback, and privacy information.

Release safety: Before updating, export a full ZIP backup. Install updates over the existing Android app using the same app identity and approved signing lineage.



Settings: data and support

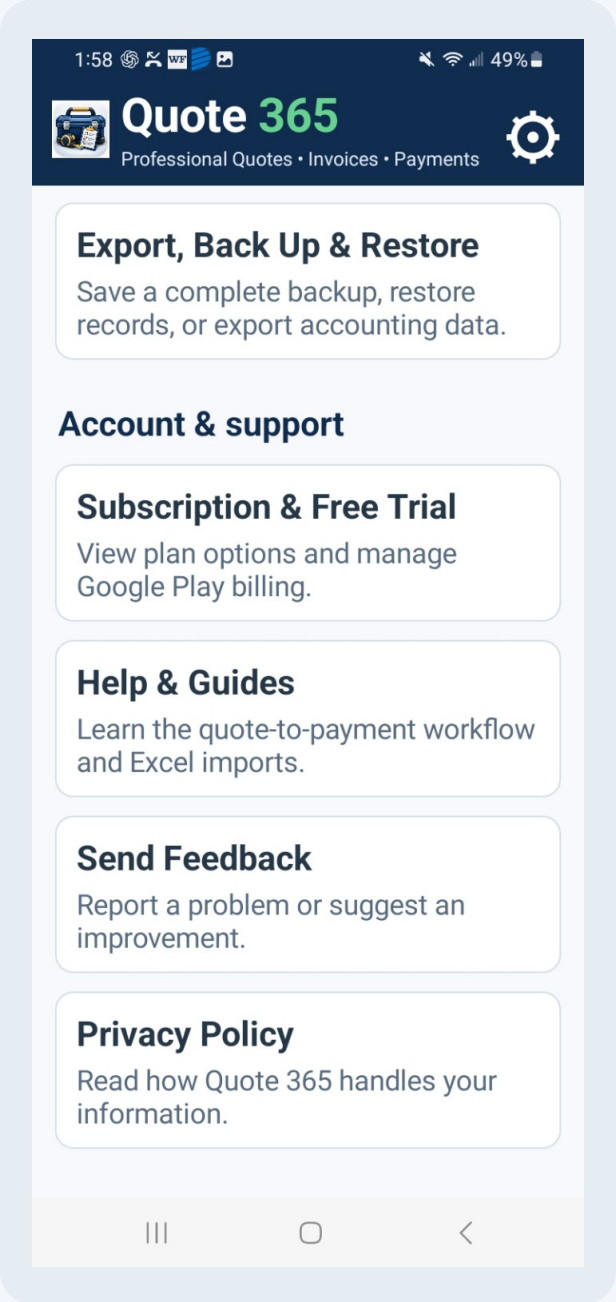
11 Imports and data export

Excel templates and record portability.

Quote 365 provides ready-made Excel templates for customers and Price Book entries.

- Download templates — Visit fieldquoteprollc.com/downloads/ for blank and fictional sample .xlsx spreadsheets.
- Keep headers intact — Enter your data below the supplied header row without changing its format.
- Import — Use Settings → Import Data and select the relevant Customers or Price Book import flow.
- Check results — Review imported rows, prices, tax settings, and any skipped records.
- Back up again — After a successful import, save a fresh backup of the updated business data.

Sample spreadsheets include fictional demonstration records. Import them into a test setup, not your real customer database, unless that is your intention.



Settings: exports, backup and support

12 Troubleshooting

Practical checks for common questions.

- Deposit link still OPEN — An active checkout awaits payment. Reuse its URL or select Check for Payments; do not assume OPEN means approved.
- Quote not Approved — Confirm the customer finished Square checkout, verify the connected merchant, and select Check for Payments.
- Invoice amount seems high — Check quote total, applicable tax/discounts, and whether the previously paid deposit was applied.
- Already-sent PDF has broken checkout — A canceled link cannot be used. Create a valid replacement and resend a fresh PDF.
- Invoice is not Paid — Confirm full outstanding amount was received and synchronized.
- Duplicates or odd figures — Use invoice/quote records and processor confirmations to reconcile; avoid manually crediting a payment already imported from Square.
- Records missing after restore — Stop making changes and locate the most recent correct full backup.
- Need support — Visit fieldquoteprollc.com/contact.html or email fqpllc@fieldquoteprollc.com.

Privacy and security: Do not send full credit-card numbers or merchant secrets in support requests. Square handles card collection on its checkout pages.

13 Quick reference

Key terms, safe practices, and customer communications.

Payment terms

- OPEN — The checkout URL is active and awaiting a verified payment.
- Approved — A quote has customer approval recorded, including verified deposit-as-approval when applicable.
- Paid — The invoice outstanding amount has been settled in the app.
- Canceled payment link — One selected checkout was disabled; other links remain available.

Before sending anything to a customer

- Review — Check customer, amounts, tax, job notes, and document totals.
- Choose — Decide whether to include a live online payment button or a PDF without one.
- Confirm — After payment, synchronize and verify the resulting status in the right quote/invoice.

Contact and updates

Website: fieldquoteprollc.com
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Publisher: FieldQuote Pro LLC

This guide corresponds to the v0.4.9.58 release candidate. Screenshots are from November 2026 pre-release testing and may differ slightly from the installed build.