START HERE

Quote-to-Deposit Tester Quick Guide

Prepared by **TMG Boost Strategies**. Follow a fictional customer from quote review to a simulated deposit—and tell us what feels clear or confusing.

Open the demo:
https://tmg-quote-to-deposit.netlify.app/
Use the sample sign-in details displayed on the sign-in screen. Do not use your real business login or customer information.

What this demo shows

A service business can keep quotes, customer decisions, deposit requirements and follow-up needs in one place. **Sample Solar and its records are fictional.** This is a workflow demonstration, not evidence of measured sales improvement.

Try the main journey

1 · Create a quote. Open **Quotes → Create Quote** (or the header's Create quote button). Enter a fictional customer, add service/item details, check the validity date and choose a deposit percentage.

2 · Check the figures. Review the total, required deposit and remaining balance. For example, a **₦100,000** quote with a **50%** deposit requires **₦50,000** upfront and leaves **₦50,000** after that deposit.

3 · Mark it sent. Select **Simulate: Mark as Sent**. This changes the quote's status; it does not email or message anyone. Save Draft instead if you only want to save your work.

4 · Take the customer's view. Open the quote's **Preview as customer** action. Check the scope and deposit terms, then choose **Accept Quote (Simulated)**. Acceptance alone must not count as payment.

5 · Simulate the deposit. Choose **Simulate Success**. Check that the deposit is recorded once and the balance remains visible. Return to **Overview** to see the updated figures.

EXPLORE & SEND FEEDBACK

Test the useful details

Use a separate fictional quote for each alternative outcome. Once a successful deposit is recorded, repeat payment actions should be unavailable.

Suggested checks

Failed or cancelled payment: on an accepted, unpaid quote, try **Simulate Failure** or **Simulate Cancel** before trying success. Neither should record a deposit or confirm a paid order.

Declined quote: use another sent quote and choose **Decline Quote**. Check that its status changes and ordinary sales reminders are no longer offered.

Follow-up draft: open **Follow-ups** or an eligible quote's reminder-preview action. Review the customer, amount and wording. Copying a draft does not send it; this demo does not send messages automatically.

Refresh and appearance: refresh after saving a fictional quote and check that it remains in the same browser. Try light/dark mode. On a phone, use the navigation menu to reach the same screens.

Help and reset: open **About this demo** for the app's explanation. Use Reset only when you intend to discard local changes and restore sample records. Sign-out is not a reset.

Important boundaries

No money is collected. Customer decisions and payments are simulations. The customer preview is an in-app view, not a secure customer link or shared portal.

Records stay in this browser and website address; other testers and devices do not share them. Clearing site data may remove progress. The shared sign-in is a demo gate, not secure authentication. Sent/accepted/declined quote terms are read-only in this version. Use fictional data only.

Help us improve the experience

Email info.cyril@tmgbooststrategies.com with:

- What you tried and the quote reference.
- What you expected versus what happened.
- Your device/browser and one suggested improvement.

Remove personal details from screenshots. The app's Email feedback link opens your mail app; you must review and send the message yourself. If no mail app opens, use the address above in your webmail.