

User Guide

Everything you need to send your first invoice

Invexa handles your quotes, invoices, recurring billing and customer statements in one place — from your laptop or your phone, with nothing to install. This guide walks you through it, screen by screen.

Quotes → Invoices

Convert in one click

VAT handled

Per line, automatically

Chased for you

Automatic reminders

What's in this guide

Start at the beginning if Invexa is new to you – the first three sections take about ten minutes and set you up for everything else.

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About the screenshots. They show a fictional business, Karoo Coffee Roasters, so you can see a system already in use. Yours will show your own company name, logo and customers.

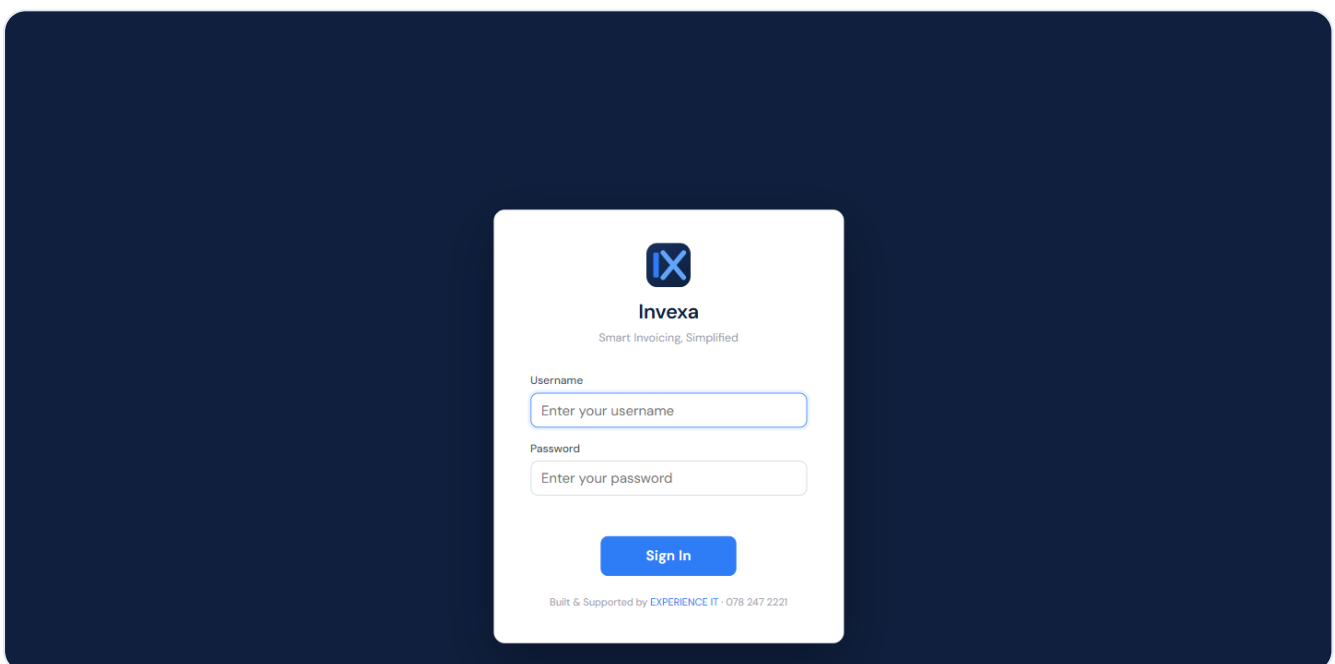
Before you start

- Invexa runs in your web browser – Chrome, Edge, Safari or Firefox. There is nothing to install.
- It works on a phone and tablet too, so you can invoice from a job site.
- Your data is backed up automatically every night. You don't need to do anything.

01 Signing in

Your Invexa lives at your own web address, and only you can get into it.

- 1 Open your browser and go to the web address we set up for you – it will look like `invexa.yourcompany.co.za`.
- 2 Enter the **username** and **password** we supplied.
- 3 Click **Sign In**.



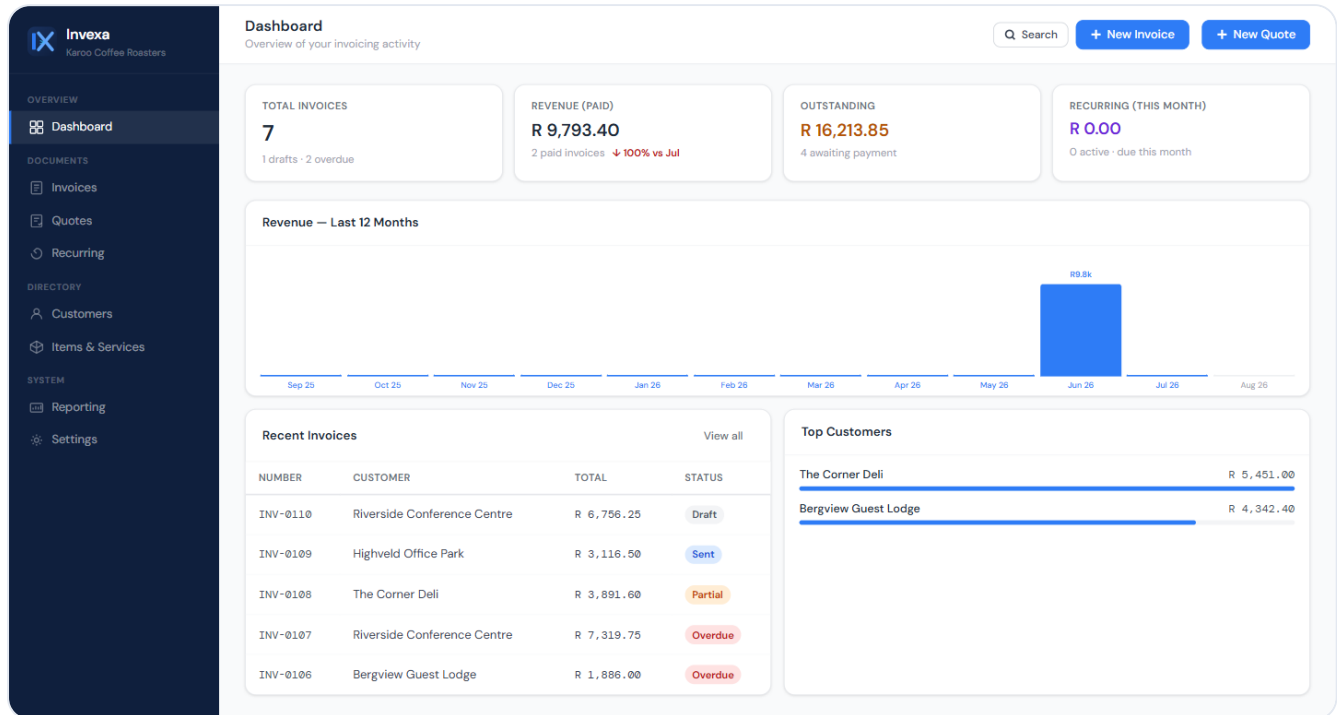
The sign-in screen. Bookmark this page, or add it to your phone's home screen for one-tap access.

Tip for phones. The username is not case sensitive, so autocorrect capitalising the first letter will not lock you out.

If you forget your password, don't keep guessing – Invexa locks the login for a short while after several wrong attempts, and the wait gets longer each time. Phone us instead and we'll reset it in a minute.

02 Your dashboard at a glance

The first screen after signing in answers the only question that matters in the morning: who owes me money?



The four figures across the top update themselves as you invoice and get paid.

Total invoices

Everything you've raised, with drafts and overdue counted underneath.

Revenue (paid)

Money actually received — not merely invoiced.

Outstanding

What's still owed to you. This is the number to watch.

Recurring

Invoices due to go out automatically this month.

Down the left is the menu you'll use for everything: **Invoices**, **Quotes** and **Recurring** for documents; **Customers** and **Items & Services** for the details they're built from; **Reporting** and **Settings** underneath.

03 Set up once: your items & services

Spend ten minutes here and every invoice afterwards takes seconds.

An **item** is anything you sell — a product, or an hour of your time. Save it once with its price and VAT rate, and it becomes a pick-list entry on every invoice and quote you ever write.

- 1 Click **Items & Services** in the menu.
- 2 Click **+ New Item**.
- 3 Give it a name, a price and a VAT rate — plus a code and unit if it helps you.
- 4 Click **Save**.

Items & Services
Your products and services catalogue

Search Items or categories...

NAME	SKU	UNIT PRICE	VAT		
COFFEE (3)					
Decaf Blend — 1kg	DC-1000	R 320.00	15%	Edit	Archive
House Blend — 1kg beans	HB-1000	R 285.00	15%	Edit	Archive
Single Origin Ethiopia — 1kg	SO-ETH	R 410.00	15%	Edit	Archive
CONSUMABLES (1)					
Filter papers (box of 100)	FP-100	R 89.00	15%	Edit	Archive
SERVICE (2)					
Barista training — half day	TRN-HD	R 1,750.00	15%	Edit	Archive
Espresso machine service	SVC-ESP	R 950.00	15%	Edit	Archive

Your price list. Change a price here and it applies to new documents — invoices already sent keep the price they were sent at.

You don't have to add everything up front. Start with the ten things you sell most. You can always type a one-off line straight onto an invoice without saving it as an item.

04 Adding customers

Capture a customer once and their details fill themselves in from then on.

- 1 Click **Customers**, then **+ New Customer**.
- 2 Fill in the name and – importantly – the **email address**, since that's where invoices and statements go.
- 3 Add their VAT number if they need it on the invoice.
- 4 Click **Save**.

The screenshot shows the Invexa web application interface. On the left is a dark sidebar with navigation links: Overview, Dashboard, Invoices, Quotes, Recurring, Customers (selected), and Items & Services. The main content area is titled 'Customers' with the subtitle 'Manage your customer database'. It includes a search bar, a '+ New Customer' button, and a table of customers. The table has columns for Name, Contact, Email, and Phone, with 'Edit' and 'Archive' links for each row.

NAME	CONTACT	EMAIL	PHONE	
Bergview Guest Lodge	Marlise du Toit	accounts@bergviewlodge.co.za	082 551 3390	Edit Archive
Highveld Office Park	Johan Meyer	jmeyer@highveldpark.co.za	083 447 9021	Edit Archive
Riverside Conference Centre	Annelie Venter	bookings@riversidecc.co.za	018 297 6612	Edit Archive
The Corner Deli	Sipho Nkosi	sipho@cornerdeli.co.za	079 220 1148	Edit Archive

Click a name to see everything you have ever sent them and what they still owe.

Nothing is ever really deleted. If you stop dealing with a customer, use **Archive**. They disappear from your day-to-day lists, but every invoice you sent them stays intact and correct.

05 Creating an invoice

The heart of it. About thirty seconds once your items and customers are in.

- 1 Click **Invoices**, then **+ New Invoice**.
- 2 Pick the **customer**. Their details attach themselves to the invoice.
- 3 Choose **payment terms** — the due date works itself out.
- 4 On each line, pick an item and set the quantity. The price and VAT come with it.
- 5 Add a **reference** if your customer needs a PO number on the invoice.
- 6 Click **Save**.

New Invoice

Customer *
Riverside Conference Centre

Invoice Number
INV-000111

Invoice Date
2026/08/08

Payment Terms
Due End of Month

Due Date
2026/08/31

Reference / Notes
PO 4471 — August standing order

Line Items

DESCRIPTION	QTY	UNIT PRICE	VAT %	TOTAL (INCL)
House Blend — 1kg beans — R 285.00	18	285	15	5899.50
Extra description (optional)				
Filter papers (box of 100) — R 89.00	6	89	15	614.10
Extra description (optional)				

+ Add another line

Subtotal (excl. VAT) R 5,664.00

VAT R 849.60

Total R 6,513.60

View Invoice Cancel Save

A part-finished invoice. Terms were set to "Due End of Month", so the due date filled itself in — and the totals update as you type.

The Total column is VAT-inclusive, and you can type into it. If you've agreed a round R2,000 including VAT, type that into the total and Invexa works the unit price backwards for you.

06 What your customer receives

Click **View Invoice** at any point to see exactly what they'll see.

Invoice INV-000111

Karoo Coffee Roasters
14 Meul Street, Potchefstroom, 2531
018 462 7788
accounts@karoocoffee.co.za
VAT: 4210998877
Reg: 2019/114572/07

INVOICE
INV-000111
Draft

Invoice Date: 2026-08-08
Due Date: 2026-08-31
Payment Terms: Due End of Month
Reference: PO 4471 - August standing order

DESCRIPTION	QTY	UNIT PRICE	VAT	AMOUNT
House Blend - 1kg beans	18	R 285.00	R 769.50	R 5,130.00
Filter papers (box of 100)	6	R 89.00	R 80.10	R 534.00
Subtotal (excl. VAT)				R 5,664.00
VAT				R 849.60
Total				R 6,513.60

PAYMENTS & CREDITS
Invoice total: R 6,513.60 Paid: R 0.00 Balance: R 6,513.60
No payments recorded yet.

RECORD PAYMENT
Date: 2026/08/08 Amount: 6513.60 Method: Bank Transfer Reference (optional): e.g. POP12345
Record

Your details, theirs, the lines, the VAT split and the total – precisely what gets emailed and attached as a PDF.

From this screen you can **Email** it to the customer, **Download** the PDF, or **Print** it. The email carries the PDF as an attachment, so there's nothing else to do.

The number your customer reads is the number everywhere. The figure on the email, the PDF and this screen are calculated in one place, so they can never disagree.

07 Invoice statuses, and getting paid

Every invoice carries a coloured badge. That badge is your whole debtors book.

Status	What it means
Draft	Started but not sent. Only you can see it, and you can still change anything.
Sent	It's with the customer and the clock is running.
Partial	Some money received, a balance still outstanding.
Paid	Settled in full. Locked, so it can't be altered after the fact.
Overdue	Past its due date and still unpaid. The days late are shown next to it.

IX Invexa

Karoo Coffee Roasters

OVERVIEW

Dashboard

DOCUMENTS

Invoices

Quotes

Recurring

DIRECTORY

Customers

Items & Services

SYSTEM

Reporting

Settings

Invoices

Create, manage and track all invoices

Q Search

+ New Invoice

ALL INVOICES

7

R 32,763.50

DRAFT

1

R 6,756.25

SENT

1

R 3,116.50

PARTIAL

1

R 3,891.60

PAID

2

R 9,793.40

OVERDUE

2

R 9,205.75

WRITTEN OFF

0

R 0.00

VOID

0

R 0.00

Q Search invoices...

All Status

All Years

☐	NUMBER ↓	CUSTOMER	DATE	DUE	TOTAL	STATUS			
☐	INV-0110	Riverside Conference Centre	2026-08-07	2026-09-06	R 6,756.25	Draft	View	Edit	Void
☐	INV-0109	Highveld Office Park	2026-08-02	2026-09-01	R 3,116.50	Sent	View	Edit	Write Off
☐	INV-0108	The Corner Deli	2026-07-27	2026-08-26	R 3,891.60	Partial	View	Edit	Write Off
☐	INV-0107	Riverside Conference Centre	2026-07-08	2026-08-07 1d	R 7,319.75	Overdue	View	Edit	Write Off
☐	INV-0106	Bergview Guest Lodge	2026-06-21	2026-07-21 18d	R 1,886.00	Overdue	View	Edit	Write Off
☐	INV-0105	The Corner Deli	2026-06-15	2026-07-15	R 5,451.00	Paid	View	Locked	Void
☐	INV-0104	Bergview Guest Lodge	2026-06-02	2026-07-02	R 4,342.40	Paid	View	Locked	Void

A running total per status across the top. Click any of those cards to filter the list beneath it.

Recording a payment

- 1 Open the invoice and scroll to **Payments & Credits**.
- 2 Enter the amount, the date and how they paid.
- 3 Click **Record** – the status moves to Partial or Paid on its own.

08 Quotes

Quotes work exactly like invoices — with one very useful extra.

Build a quote the same way you build an invoice. When the customer accepts it, you don't retype a thing: **convert the quote into an invoice in one click**, and every line, price and discount comes across.

Quotes
Create and send quotes to customers

Q Search [+ New Quote](#)

ALL QUOTES	DRAFT	SENT	ACCEPTED	DECLINED	EXPIRED	VOID
3 R 17,080.95	1 R 6,365.25	1 R 3,413.20	1 R 7,302.50	0 R 0.00	0 R 0.00	0 R 0.00

Q Search quotes... All Status All Years

NUMBER ↓	CUSTOMER	DATE	VALID UNTIL	TOTAL	STATUS			
☐ QUO-0043	Bergview Guest Lodge	2026-08-06	2026-09-05	R 6,365.25	Draft	View	Edit	Void
☐ QUO-0042	Highveld Office Park	2026-07-30	2026-08-29	R 3,413.20	Sent	View	Edit	Void
☐ QUO-0041	Riverside Conference Centre	2026-07-19	2026-08-18	R 7,302.50	Accepted	View	Locked	Void

Quotes expire on their own once past their valid-until date, so your pipeline stays honest.

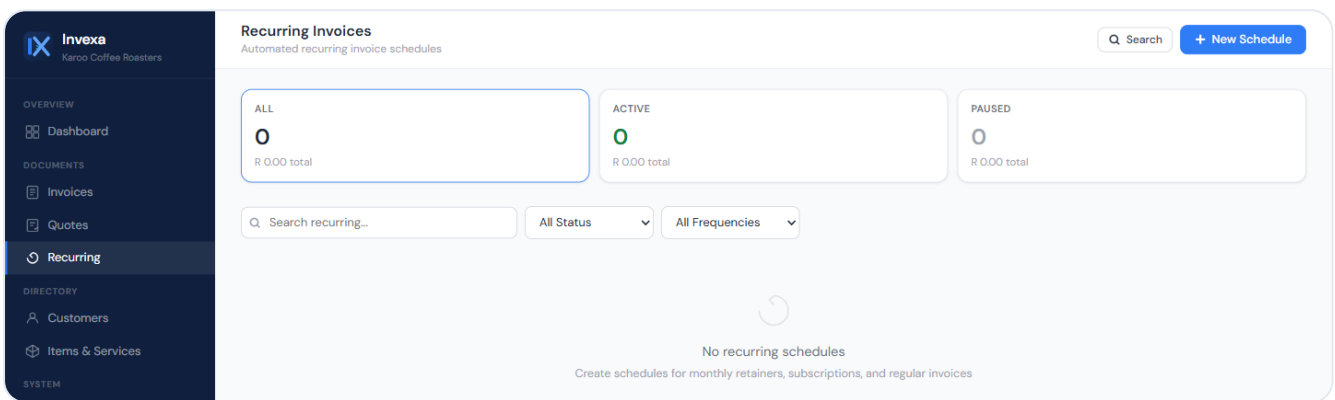
- 1 Click **Quotes**, then **+ New Quote**.
- 2 Build it exactly as you would an invoice.
- 3 Email it to the customer.
- 4 When they accept, open it and click **Convert to Invoice**.

Win rate. Because Invexa knows which quotes turned into invoices, the Quotes report can tell you what proportion of your quoted work you actually win — by value, not just by count.

09 Recurring invoices

For anything you bill on the same day every month. Set it up once and stop thinking about it.

- 1 Click **Recurring**, then **+ New Schedule**.
- 2 Choose the customer and build the invoice lines as usual.
- 3 Set how often it repeats – weekly, monthly, quarterly or yearly – and the date of the first one.
- 4 Click **Save**. Invexa raises and emails each invoice on the day, by itself.



Each schedule shows when the next invoice goes out, and you can pause one at any time without deleting it.

Month-ends are handled properly. A schedule anchored to the 31st bills on the 30th, or the 28th in February – it will never skip a month or drift onto the wrong date.

10 Statements & reports

For chasing money, and for your accountant.

The screenshot shows the 'Reporting' section of the Invexa user interface. On the left is a dark sidebar with navigation links: Overview, Documents (Dashboard, Invoices, Quotes, Recurring), Directory (Customers, Items & Services), and System (Reporting, Settings). The main content area is titled 'Reporting' with the subtitle 'Customer statements and financial reports'. It contains three report cards:

- Customer Statement:** Includes a 'CUSTOMER' dropdown (labeled 'Select customer...'), a 'PERIOD' dropdown (labeled 'This Month'), 'FROM' and 'TO' date fields (labeled 'yyyy/mm/dd'), an 'Email All Owing' button, and a 'Generate' button.
- Invoiced vs Paid:** Includes a 'PERIOD' dropdown (labeled 'This Month'), 'FROM MONTH' and 'TO MONTH' date pickers, and a 'Generate' button.
- Quotes:** Includes a 'PERIOD' dropdown (labeled 'This Month'), 'FROM MONTH' and 'TO MONTH' date pickers, and a 'Generate' button.

Every report can be printed, saved as a PDF, or emailed straight from here.

Customer statement

Everything one customer owes, aged into current, 30, 60 and 90+ days.

Email all owing

Sends every customer with an outstanding balance their own statement, in one click.

Invoiced vs paid

What you billed against what you actually collected, over any period.

Quotes

Your win rate by value – quoted versus converted.

Chasing late payers, automatically

Invexa emails polite reminders on your behalf as invoices age – a gentle nudge first, then a firmer one, then a final notice, with the invoice attached each time. It stops the moment they pay, and it never sends a final notice to someone who was never reminded before.

11 Getting help

You have a person, not a ticket queue.

A few things worth knowing

- **Your data is backed up every night**, off-site. You never have to think about it.
- **Nothing is permanently deleted.** Customers and items are archived; paid invoices are locked rather than removed.
- **Made a mistake on a sent invoice?** Void it – it keeps its number for your records and drops out of every total.
- **It works on your phone.** The same address, the same login.

Changing your company details or logo

Everything that appears on your documents – company name, address, VAT number, logo, bank details and the standard terms at the foot of an invoice – lives under **Settings**. Change it there and every new document picks it up.

Stuck on something?

Phone or WhatsApp – we would far rather spend two minutes on the phone than have you fight with it.

PHONE / WHATSAPP

078 247 2221

WEB

experience-it.co.za

Invexa is built, hosted and supported by Experience IT.