Ezer User Manual

For business owners and whoever handles the paperwork

Build 2026.11.16.7 · 2026-11-16

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PART A GETTING STARTED · CHAPTER 1

What is EZer

> EZer shows you the profit of each project. It keeps your bills and documents in order and hands clean data on to your accountant.

1.1 EZer shows the profit of each project

EZer tracks profit and loss project by project. Every income and cost amount lives under a project, so you see the profit of each job at once. You do not recalculate it in a spreadsheet.

The figures come from the documents you make. When you issue a sales document or upload an expense bill, EZer files the figures under that job's project for you.

How it works in three steps

- **Record.** Write a sales document, or send in a photo of an expense bill, through LINE or on the web. EZer helps read the bill.
- **See the profit.** Every amount lands in its own project. You read profit and loss on the dashboard and on the project page.
- **Hand over.** When the books are due, you press "Lock" (ล็อก) on the documents that are ready, and your accountant opens the same data in EZer. The button only marks and locks the document. It sends no file to anyone.

1.2 What you can do

On the income side

You can issue quotations, invoices, receipts and tax invoices, and credit or debit notes. Each document continues from the one before it, so you do not retype the figures.

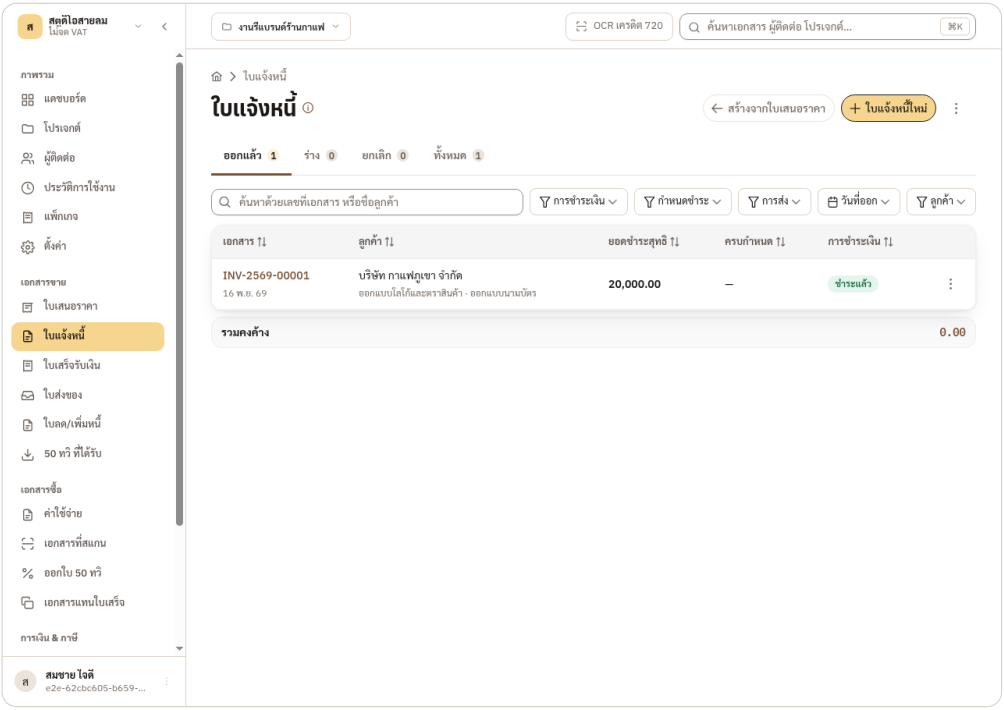


Figure 1-1 The invoice turns to paid on its own once you issue the receipt from it.

On the cost side

You record cost bills under expenses (ค่าใช้จ่าย). Input VAT and withholding tax go in the same form, and EZer works out what you actually pay.

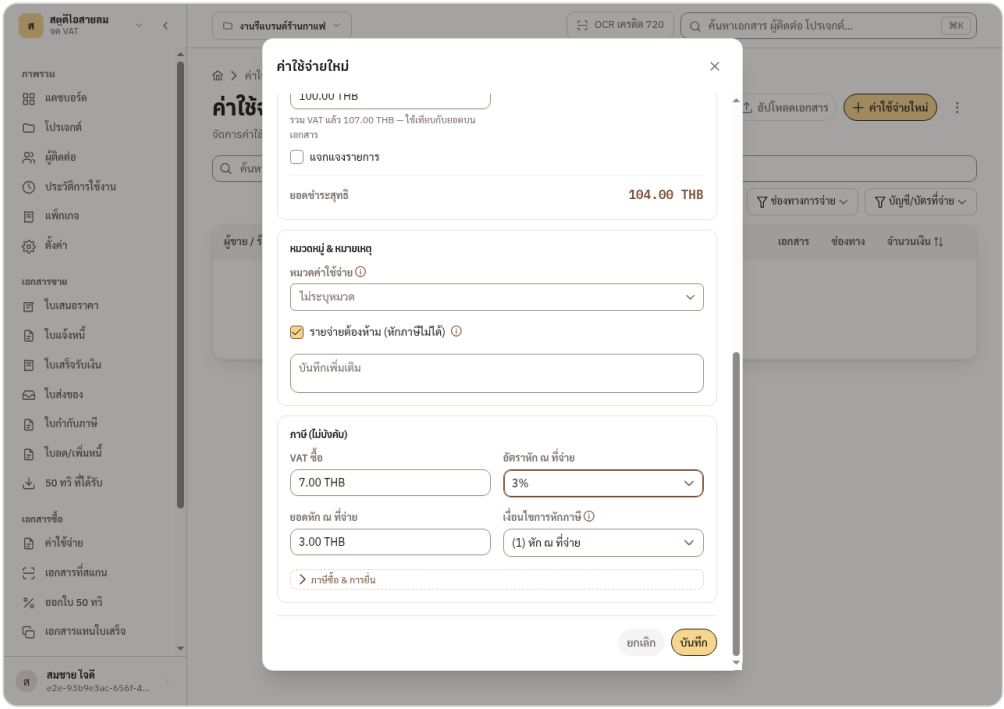


Figure 1-2 Input VAT and withholding tax go in the same form, and EZer works out what you actually pay.

When the other side gives you no document, EZer helps you prepare a receipt substitute (ใบแทนใบเสร็จรับเงิน) or a payment voucher (ใบสำคัญรับเงิน) as evidence of the cost. Use it only when the payment really happened, and keep the payment slip. A false document is a criminal offence.

Where to read more

This chapter gives the overview only. The details are in these chapters.

Create your first provider(page 15)

Reading the dashboard figures(page 130)

Splitting a job with your team(page 134)

Expense rules(page 70)

Packages and billing(page 154)

1.3 Why every figure belongs to a project

All financial figures in EZer live under a project. That is how you know what each job earned or lost, instead of seeing one total for the whole business.

The provider and your contacts

The provider (ผู้ให้บริการ) is your business. Under settings (ตั้งค่า) it holds identity only: business name, 13-digit tax ID, registered address, VAT status and logo. It holds no financial figures.

The contacts (ผู้ติดต่อ) menu is one directory of clients and vendors that every project can use. You do not retype a counterparty's tax details for each new job.

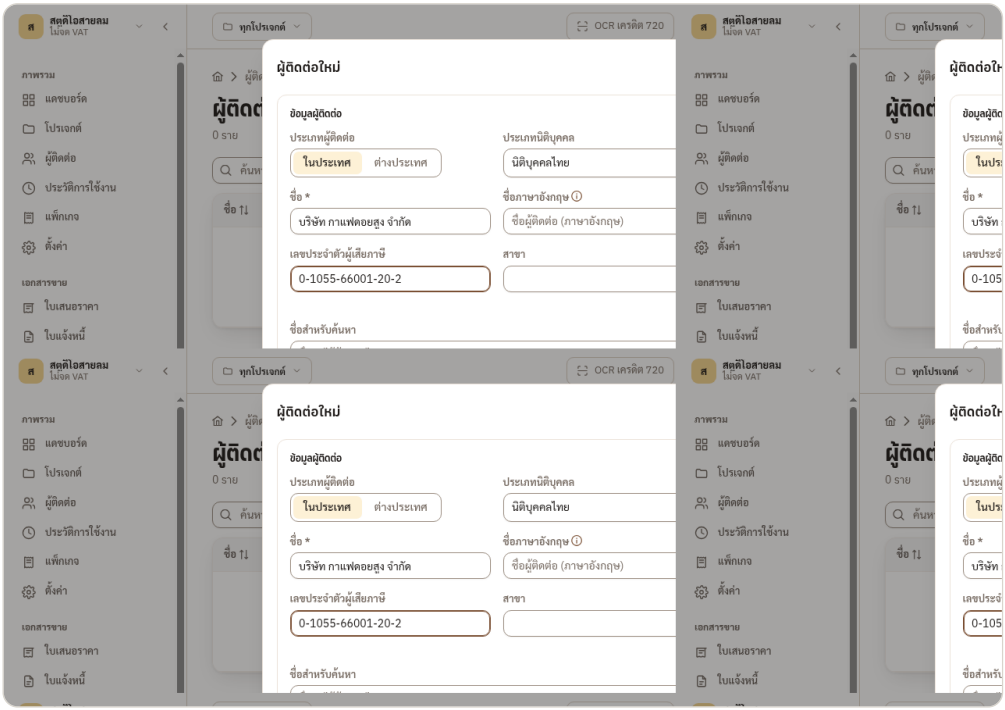


Figure 1-3 Enter a contact once and every project can use it.

1.4 Documents are how the data gets in

Documents in EZer turn your transactions into figures you can trace back. Amounts from sales documents, expenses, petty cash and advances (เงินสดย่อยและเงินทดรองจ่าย) and assets (ทรัพย์สิน) feed the profit and loss (กำไร–ขาดทุน) report of their own project.

The document register (ทะเบียนเอกสาร) gathers every kind of document in one place. You search it, check statuses and review the history of each entry there.

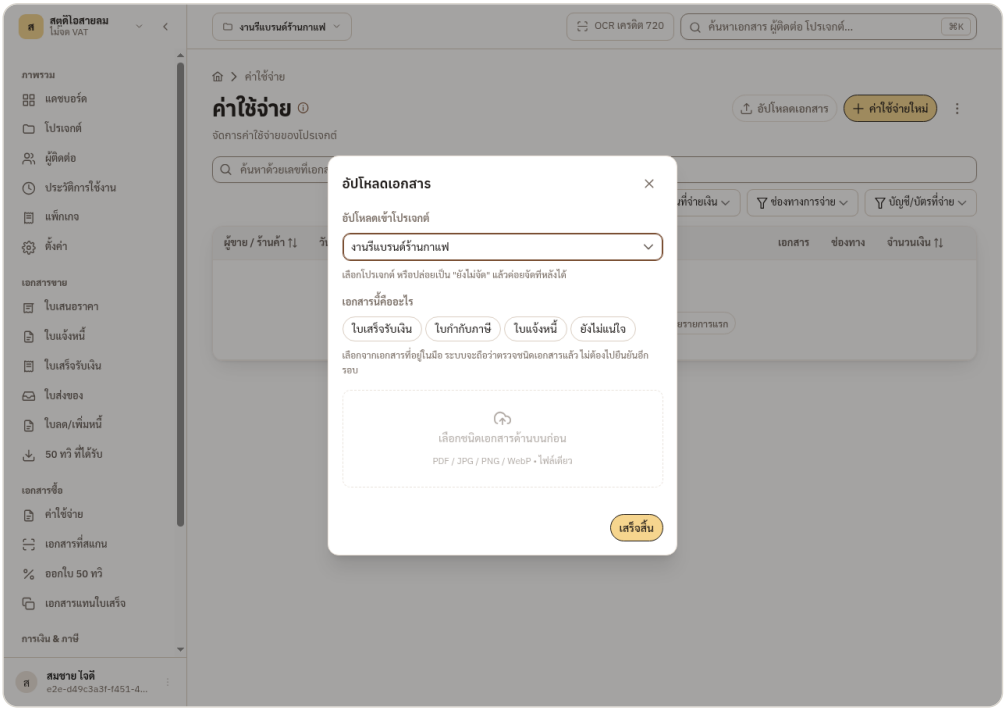


Figure 1-4 On upload EZer asks for the document kind first, so it files the figures in the right place.

1.5 EZer and your accountant

EZer is not accounting software and does not file taxes for you. It keeps single-entry figures so you can judge each project. It is not double-entry bookkeeping and not a statutory ledger. Its job is to organise your data and hand it on. Your accountant still keeps the books and files the returns.

The owner and the accountant can work on the same records. Each sees and edits what their role allows, and EZer keeps a history of every edit to a document.

> **Caution**
>
> A document you press "Lock" (ล็อก) on is locked. When you close a month, EZer locks that month's records at once. To edit one, a person with the right permission must unlock it first. Every edit is recorded. Tell your accountant each time you change data that was already locked.

PART A GETTING STARTED · CHAPTER 2

Learn EZer with your AI assistant

> Copy one short prompt into the AI assistant you already use, and let it teach you EZer from this manual, one step at a time.

2.1 How it works

This manual has a version an AI assistant can read directly. You do not have to copy the whole manual: give the assistant a link, and it reads it and teaches you.

1. Copy the prompt in the box below.
2. Paste it into the AI assistant you use, such as ChatGPT, Claude or Gemini. The assistant must be able to open links from the web.
3. Tell the assistant in plain words what you want to do in EZer today, such as issuing a quotation (ใบเสนอราคา) or recording an expense, and follow it step by step.

2.2 The prompt to copy

Copy the whole box. You do not need to change anything.

You are my teaching assistant for EZer, a document and expense management system for freelancers and small businesses in Thailand.

Before every answer, read the full manual at this link: https://hbg-ezer.web.app/en/manual/llms-full.txt

Rules:
- Teach only from the manual. Never guess a button name, menu name or step that the manual does not describe.
- If the manual does not cover what I ask, say plainly that it does not.
- Use button and menu names exactly as the manual writes them.
- For tax and legal questions, say only what the manual says, and suggest an accountant for a specific case.
- Teach one step at a time, and wait until I have finished it before the next.
- If you have EZer tools connected (MCP), you may read my data with them, but ask me before you create, edit or send anything.

Start by asking me what I want to do in EZer today.

2.3 Good to know

Unless you have connected MCP, the assistant reads only the manual. It cannot see your screen or the data in your EZer. If you get stuck, type what you see on your screen.

An AI assistant can misunderstand or get details wrong. Always check against your real screen, especially for issuing documents and anything about tax.

Avoid sending customer details, tax IDs or real documents to the assistant unless you must. Teaching does not need them.

Want the assistant to work inside EZer too: connect your AI assistant to EZer (page 184)

PART A GETTING STARTED · CHAPTER 3

Create your first provider

> A provider is the business identity printed on the header of every document. This chapter takes you from an empty account to your first one.

3.1 What a provider is

A provider is the identity of your business, your shop, or yourself that appears on the header of every document, including a quotation (ใบเสนอราคา), an invoice (ใบแจ้งหนี้), and a receipt (ใบเสร็จรับเงิน). This level stores only business identity details such as names, addresses, and tax numbers, with no financial figures attached. You can set up more than one provider under a single account if you run multiple businesses.

You create a provider before anything else because Ezer attaches every project and document to the business that owns the work. Until at least one exists, the app sends you back to the provider list each time.

3.2 Your account is activated first

During this preview period Ezer runs on limited access, so a newly registered account cannot create a provider straight away. If you open the provider list and see that your account is awaiting activation, it is queued. Press ตรวจสอบอีกครั้ง to check the current status.

Waiting does not stop you working. If a colleague shares their provider with you, you can enter it and work on what you have been given access to, without waiting for your own activation.

3.3 What you fill in

Once your account is activated, open the provider list and press สร้างผู้ให้บริการ to start entering your business details.

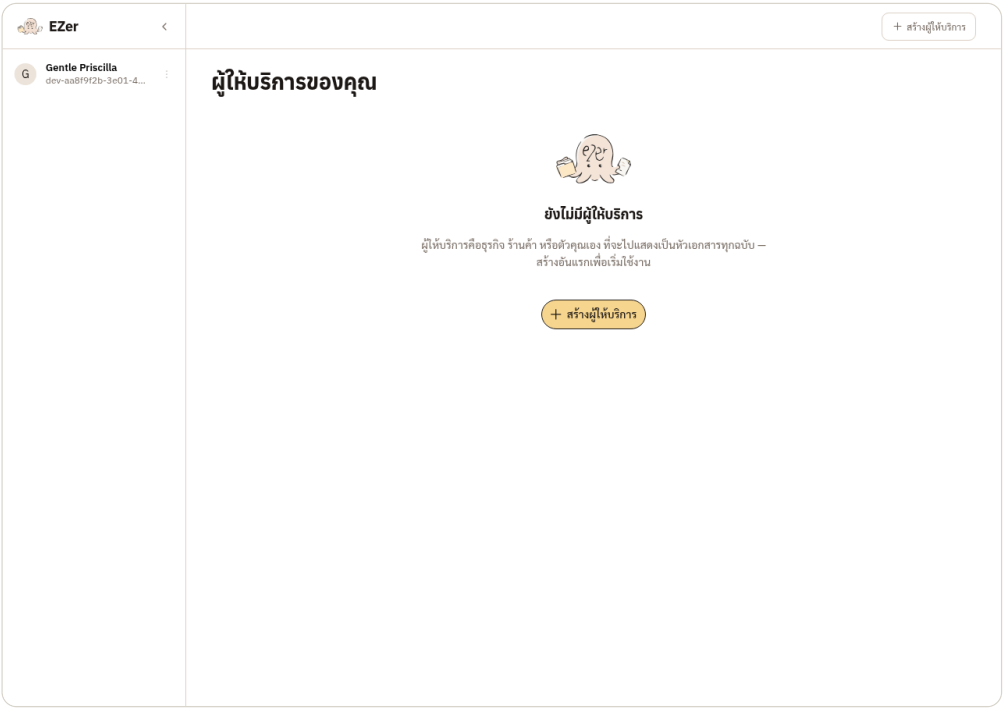


Figure 3-1 The provider list of an account with no providers yet — this is the button to press.

Three steps

1. Open the provider list and press **สร้างผู้ให้บริการ**.
2. Fill in the **ชื่อผู้ให้บริการ** exactly as registered with the Revenue Department. This is the only mandatory field — the save button stays disabled until you do.

3. Press **สร้างผู้ให้บริการ** at the foot of the form. That is enough to start working.

> If you do not have your paperwork to hand, enter the name, save, and come back for the rest when you are about to print a real bill. You can change all of it later under settings — it is the same form.

The remaining fields, whenever you are ready

Field	Fill it in when
เลขประจำตัวผู้เสียภาษี	Before you issue a real bill — it appears on the document.
ที่อยู่จดทะเบียน	Before you issue a real bill; it prints on your receipts and invoices.
ประเภท	If you are not an individual. Choosing another type adds a **สาขาที่** field; 00000 is a head office.
จดทะเบียนภาษีมูลค่าเพิ่ม	If your business is registered for VAT.
ชื่อภาษาอังกฤษ · ที่อยู่ภาษาอังกฤษ	Only if you issue documents in English. Leave blank and the Thai values are used.

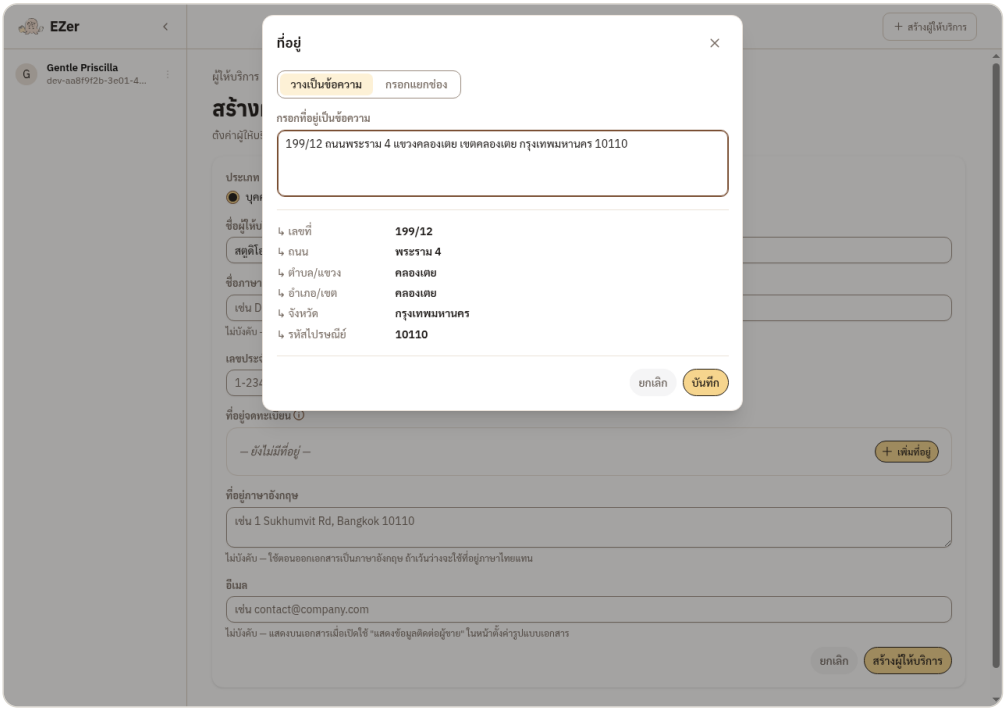


Figure 3-2 The registered address opens in its own box: paste the address as one block and Ezer splits it into fields for you to check.

The app shows naming guidance for whichever type you pick. For บุคคลธรรมดา give your full name with the title as it appears on your ID card or your ภ.พ.20. For บริษัท use the full name on your company affidavit, including the words บริษัท and จำกัด. For ห้างหุ้นส่วน and มูลนิธิ use the full registered form of the name.

PART A GETTING STARTED · CHAPTER 4

Create your first project and your contacts

> Set up the first project for your work, and add the contacts every project can use, before you issue documents.

4.1 What a project is

Your provider is ready. Next you create a project. A project holds the documents, costs and profit of one job in one place. Every document lives under a project, so you cannot issue a quotation or record an expense until a project exists.

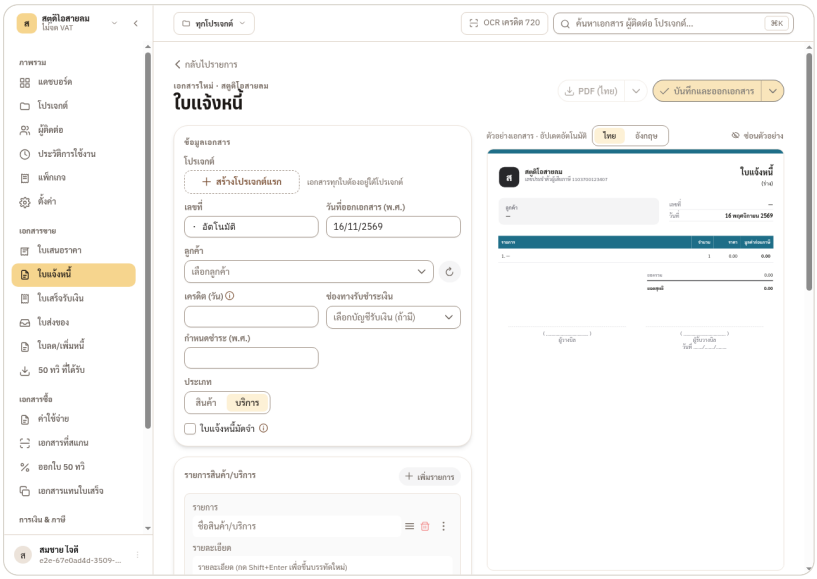
A project needs only a name. Name it after the job or the client. You do not enter a client, dates or a budget. You also do not set the project's stage. EZer works it out from the documents issued in the project.

see section 13.1 **Project stages**(page 129)

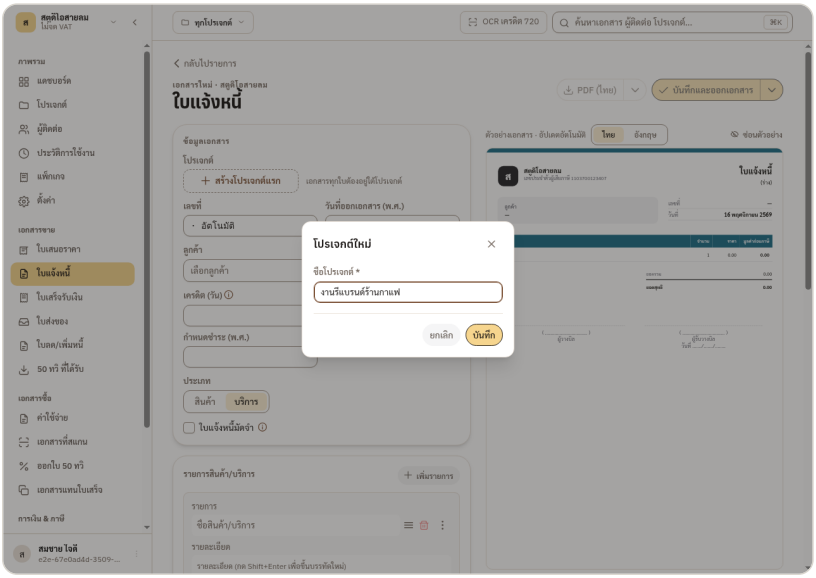
4.2 Create the first project

The main administrator (ผู้ดูแลหลัก) and the manager can create projects. If your role cannot, you do not see the create button, and the document form tells you to ask an administrator to create a project first.

1. If you have no project at all yet, open a new invoice. The form says every document must live under a project, and the **บันทึกและออกเอกสาร** button stays disabled.

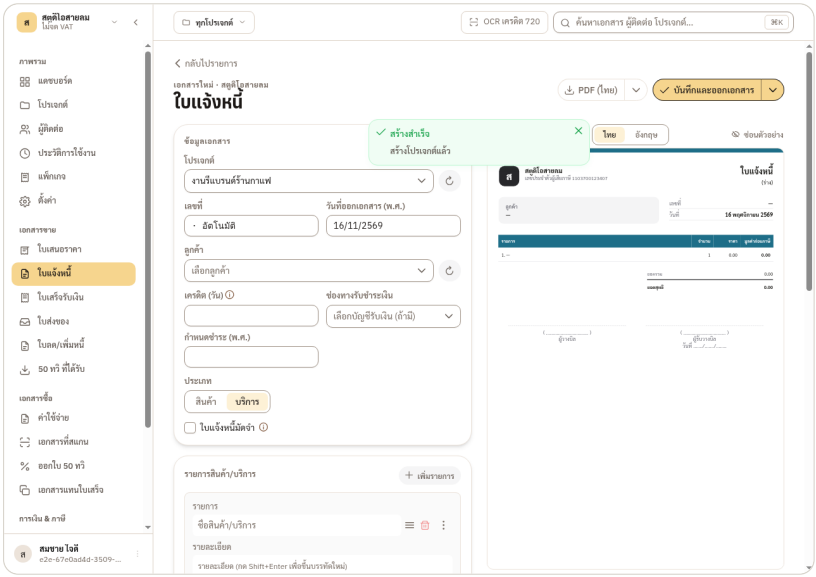


2 Press **สร้างโปรเจกต์แรก** and type the **ชื่อโปรเจกต์**, for example the client's or the job's name.



3 Press **บันทึก** in this window.

> → **You should see** The form picks the new project for you, and the **บันทึกและออกเอกสาร** button works.



The usual way is the **โปรเจกต์** menu with **โปรเจกต์ใหม่**. The way through the document form above appears only while you have no project at all. The create window is the same kind. To rename a project later, use **เปลี่ยนชื่อ**.

> **Caution**
>
> Archive a project you no longer use with **เก็บเข้าคลัง**. EZer hides it from lists and pickers, and you can restore it. **ลบถาวร** is refused when the project holds an issued or cancelled document, an expense, an asset, a withholding-tax certificate or a loan account.

4.3 What a contact is

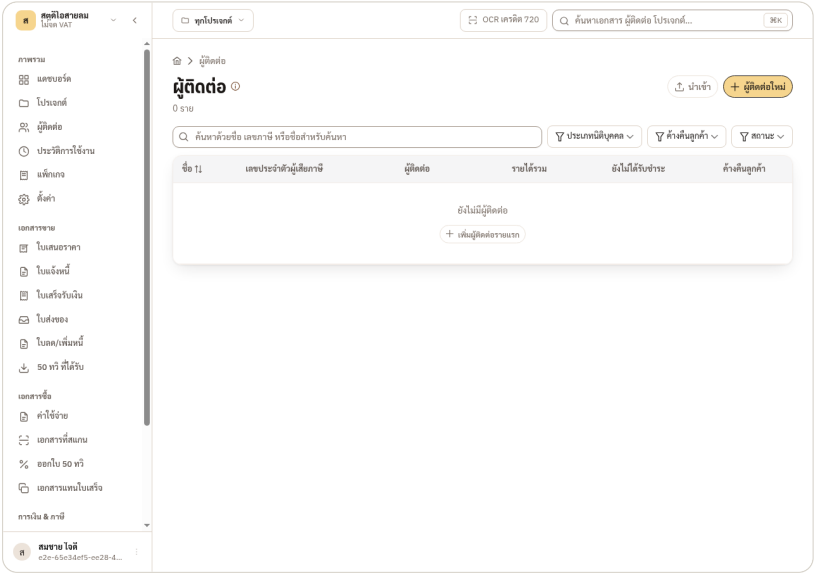
The **ผู้ติดต่อ** menu keeps customers and vendors in one place. You enter a contact once and every project of the provider can use it. There is no customer-or-vendor switch. The role comes from use: on a quotation the contact is a customer, on an expense it is a vendor.

In a sales document form, the **สร้างลูกค้าใหม่** button creates the same kind of contact. It is not a separate list.

The manager, the document clerk, sales and purchasing/accounts can create and edit contacts, and no package is needed.

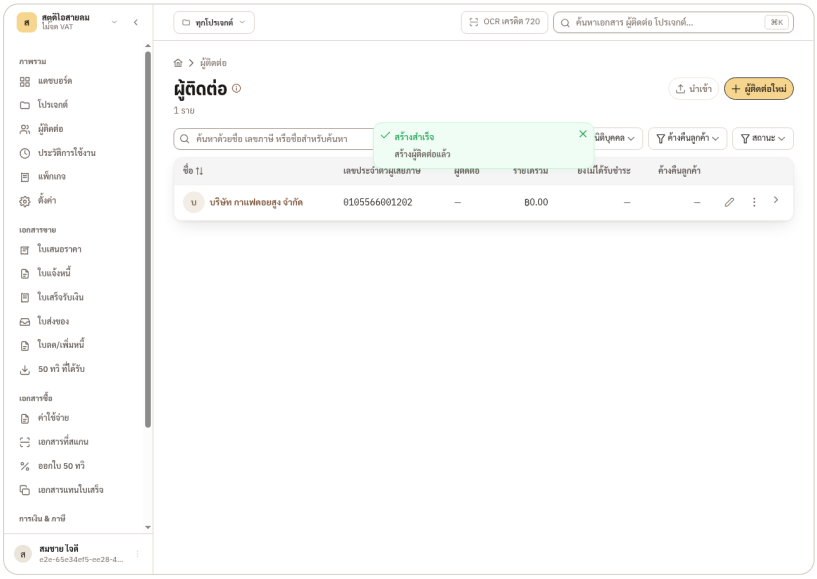
4.4 Add a contact

1. Open the **ผู้ติดต่อ** menu and press **ผู้ติดต่อใหม่**.

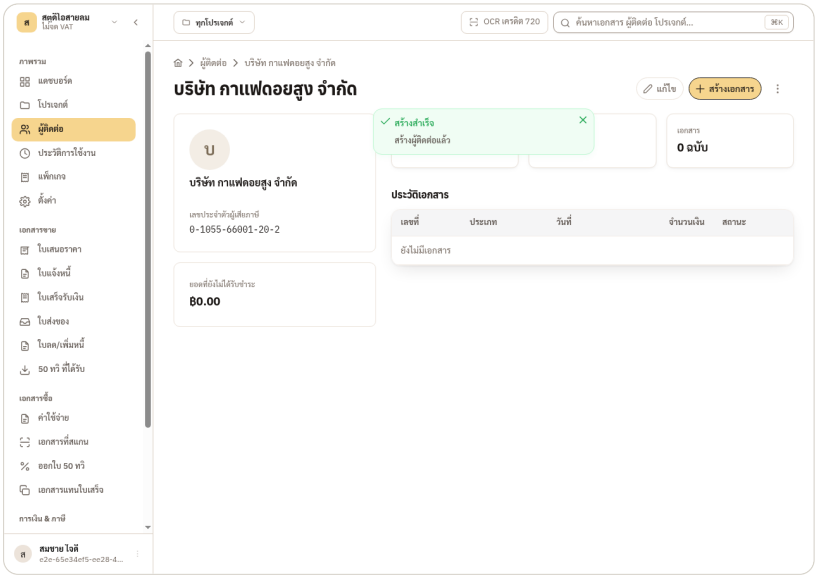


2 Choose the **ประเภทผู้ติดต่อ** (domestic or foreign) and the **ประเภทนิติบุคคล**, fill the **ชื่อ**, the **เลขประจำตัวผู้เสียภาษี** and the **สาขา**, then press **บันทึก**.

→ **You should see** The new contact appears in the list.



3 Click the contact's name to see the details. From there you can press **แก้ไข**, or press **สร้างเอกสาร**, which takes you to pick a project first.



Choose the type that matches the person

The form starts as **นิติบุคคลไทย** (a Thai company). If the contact is a person, change it yourself. The type decides the withholding-tax rate EZer offers when you pay them, so choose the one that matches their legal identity. There are six choices.

- **บุคคลธรรมดา (ไทย)**: a Thai individual.
- **นิติบุคคลไทย**: a Thai company or other juristic person.
- **หน่วยงานรัฐ**: a government body.
- **นิติบุคคลต่างชาติ**: a foreign company.
- **บุคคลต่างชาติ**: a foreign individual.
- **มูลนิธิ / สมาคม**: a foundation or an association.

EZer shows a gentle warning when the name or tax ID does not look like the chosen type, for example a number that starts with 0 belongs to a company. It is only a warning, and the choice stays yours. The withholding-tax rate rules are not in this manual.

Tax ID, branch and DBD data

- A contact is one tax ID plus one branch. If the number and branch match an existing contact, EZer refuses to save. A blank branch means the head office (00000). Another branch is a separate contact. Contacts with no tax ID may repeat. A Thai 13-digit number with a wrong check digit is refused.
- To use data from the Department of Business Development (DBD), fill the **เลขประจำตัวผู้เสียภาษี** first, then click out of the field. For a valid company number, EZer offers **พบข้อมูลบริษัทนี้ — คลิกเพื่อใช้**. It offers this only while the name and address are still empty. Check the data in the window that opens before you use it. The data is the head office's, has no postcode, and can be out of date.
- Choose foreign as the **ประเภทผู้ติดต่อ** and you may leave the Thai tax ID blank. For a foreign individual, a passport number field appears.

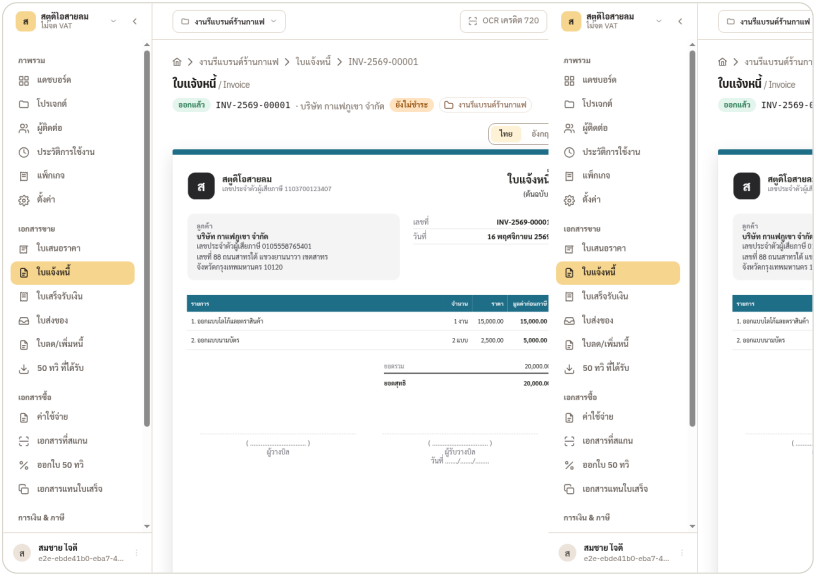
To add many contacts at once, use the **นำเข้า** button on the contacts page. EZer gives a template and previews each row before importing.

4.5 Change a contact later

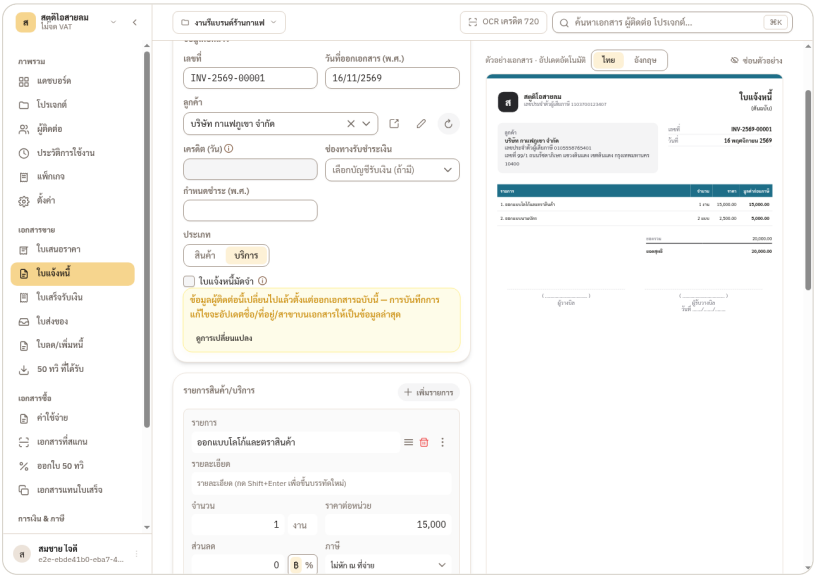
Editing a contact does not change documents already issued. Such a document still prints the old address. But if you open an issued document that is not yet locked and save it, it takes the contact's latest details. The form warns you first

that the contact has changed. A document that is locked, or in a closed month, cannot be changed.

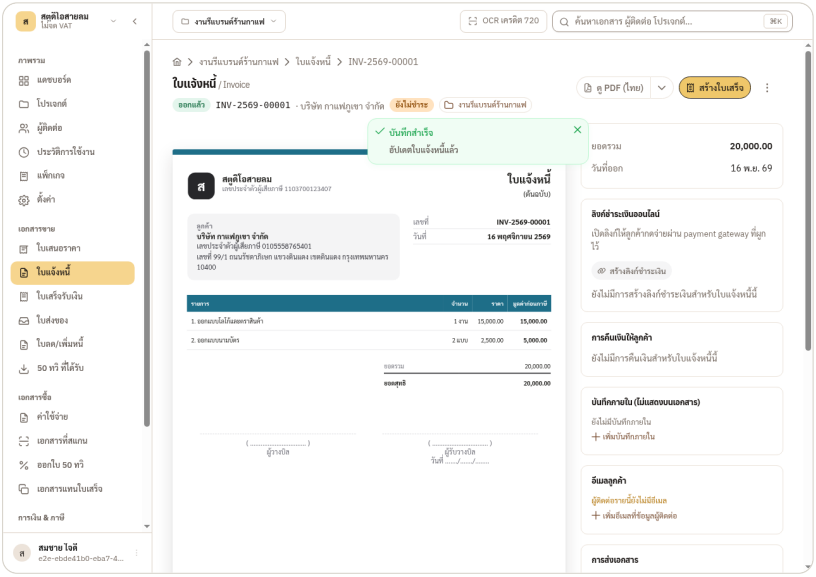
1. After you change a contact's address, an already issued document still shows the old address.



2 Open that document to edit it. The form warns that the contact has changed.



3 After you save, the document carries the new address.



Duplicates, retiring and deleting

- EZer has no merge button for contacts. If you have a duplicate, archive one with **เก็บเข้าคลัง**.
- **เก็บเข้าคลัง** hides the contact from lists and pickers, can be undone with **กู้คืน**, and leaves issued documents untouched.
- **ลบถาวร** is refused if a sales document or an advance entry uses the contact. Archive it instead.

4.6 What next

With a project and a contact, you can issue your first sales document.

Issue your first sales document(page 30)

PART B DAILY WORK · CHAPTER 5

Issue your first sales document

> Write a quotation, turn it into an invoice, issue a receipt when you are paid, and send it to your customer, one step at a time.

5.1 Before you start

Every sales document lives under a project, and your provider (your business) must already exist. If it does not, follow the chapter on creating your first provider first.

Create your first provider(page 15)

If you have no project yet, the document form has a **สร้างโปรเจกต์แรก** button (only for people who may create projects). You can pick or create the customer in the same form.

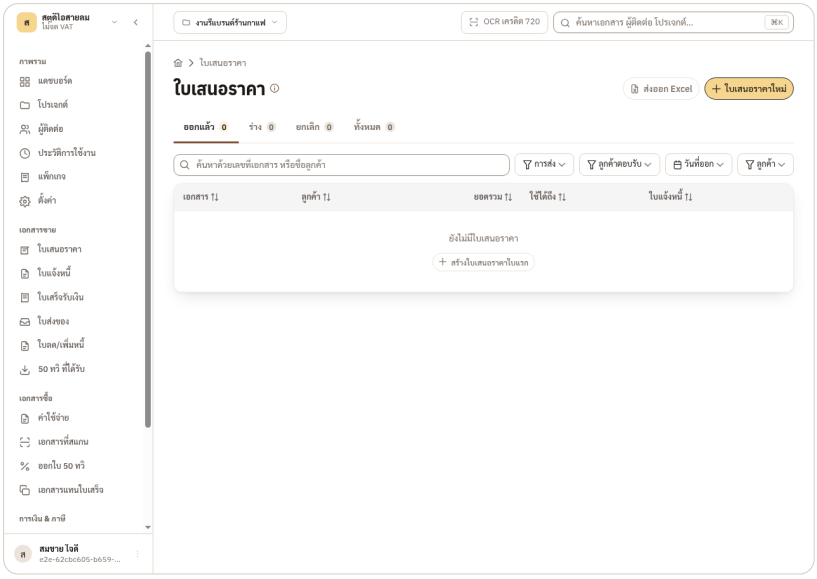
The sales documents (เอกสารขาย) menu sits in the sidebar. It holds quotations (ใบเสนอราคา), invoices (ใบแจ้งหนี้) and receipts (ใบเสร็จรับเงิน). The tax invoice (ใบกำกับภาษี) appears there only when your business is VAT-registered.

The manager, sales and the document clerk can issue sales documents.

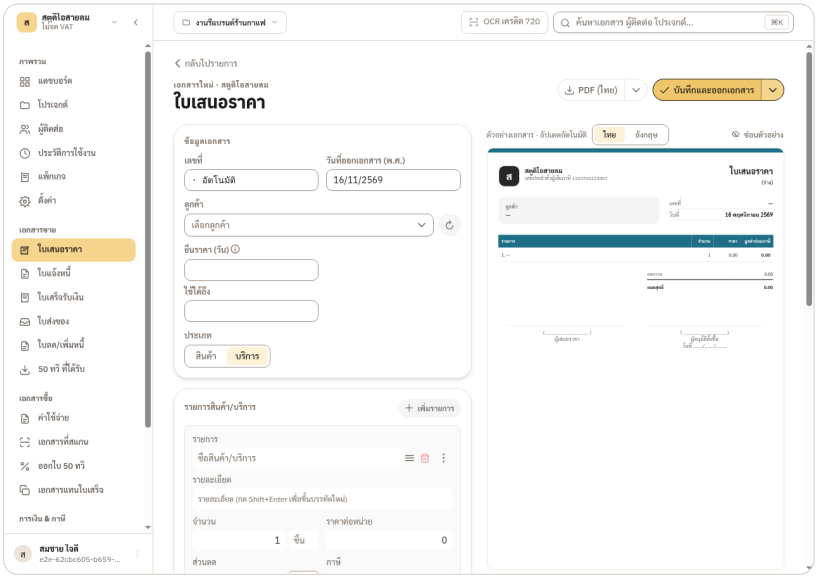
5.2 Step 1: write a quotation

A quotation tells the customer what you will do and for how much. It is not yet a debt. If you sell and bill straight away, you can skip to the invoice in step 2.

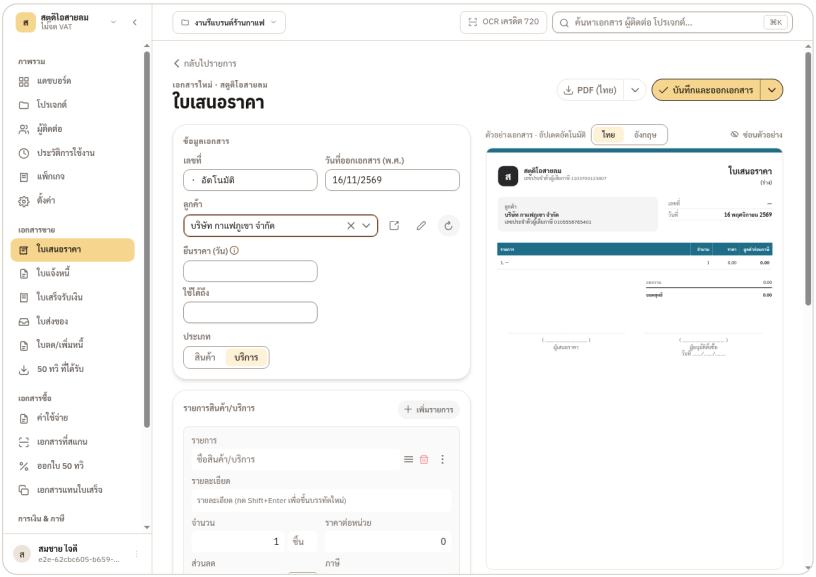
1. Open sales documents > quotations (ใบเสนอราคา) and press **ใบเสนอราคาใหม่**. If the list is empty, press **สร้างใบเสนอราคาใบแรก**.



2 In the **เอกสารใหม่** form, pick the **ลูกค้า** (and the project, if the form asks for one). A customer is required before you can issue. If you have none yet, open the **ลูกค้า** field and choose **สร้างลูกค้าใหม่** at the top of its list.

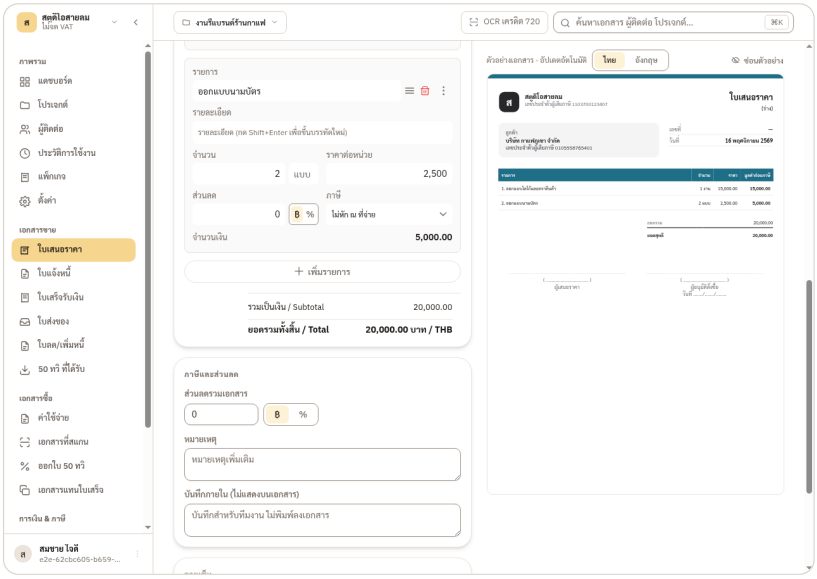


3 Check the customer’s name and address. If they are wrong, press **แก้ไขผู้ติดต่อ** and fix them before you issue.



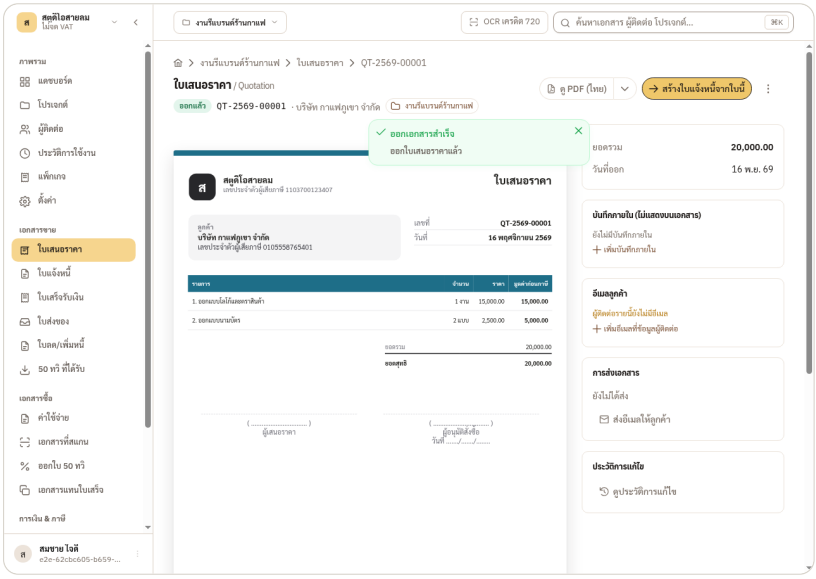
4 Under **รายการสินค้า/บริการ**, press **เพิ่มรายการ** and fill **รายการ**, **จำนวน**, **หน่วย** and **ราคาต่อหน่วย**. EZer adds up the total.

> → **You should see** For a business that is not VAT-registered, the total equals the subtotal. There is no VAT.



5 Press **บันทึกและออกเอกสาร**.

> → **You should see** The quotation gets a number such as QT-2569-00001, and its detail page opens.



Where the document number comes from

A number reads type, Buddhist-era year, then a five-digit count, for example QT-2569-00001 and INV-2569-00001. EZer assigns it when you issue, so a draft has no number yet. The count restarts each calendar year. It runs across the whole business, not per project. If you cancel a document, its number is kept and never reused.

To keep a document for later, open the arrow beside the button and choose **บันทึกฉบับร่าง**. You can edit and delete a draft that never had a number. A draft pulled back from issued keeps its number and cannot be deleted.

Due dates and how long a price holds

A quotation has **ยืนราคา (วัน)**, which works out **ใช้ได้ถึง**. An invoice has **เครดิต (วัน)**, which works out **กำหนดชำระ**, or you can pick the due date yourself. EZer refuses a due date earlier than the issue date. Write other text in **หมายเหตุ**, which prints on the document. **บันทึกภายใน** never prints.

If you are VAT-registered, the tax invoice and VAT have their own rules. See the chapter on receipt rules.

Receipt rules(page 45)

Typing a price that includes VAT

A VAT-registered business can type prices **ก่อน VAT** (before VAT) or **รวม VAT** (VAT included) at the top of the item table. With **รวม VAT**, type the price the customer really pays. The document total is exactly what you typed: type 7,000,000 and the total is 7,000,000.00. EZer takes the VAT out of that price by the Revenue Department method: VAT = price × 7 ÷ 107, rounded to the satang once. What is left is the amount before VAT.

A baht discount on a line, and a fixed discount on the whole document when every line is VAT-included, count VAT-included like the price. A discount of 10.70 baht off a price of 107.00 lowers the total by exactly 10.70. The document prints the discount as an amount before VAT (10.00 baht), so the figures on the page add up. Use the discount field only for a discount given at once. Do not use it for a conditional or a later discount, because those do not lower the VAT base.

Because VAT is rounded once from the VAT-included price, about 6 prices in 100 show a VAT that differs by 1 satang from 7% of the amount before VAT. Documents you already issued do not change.

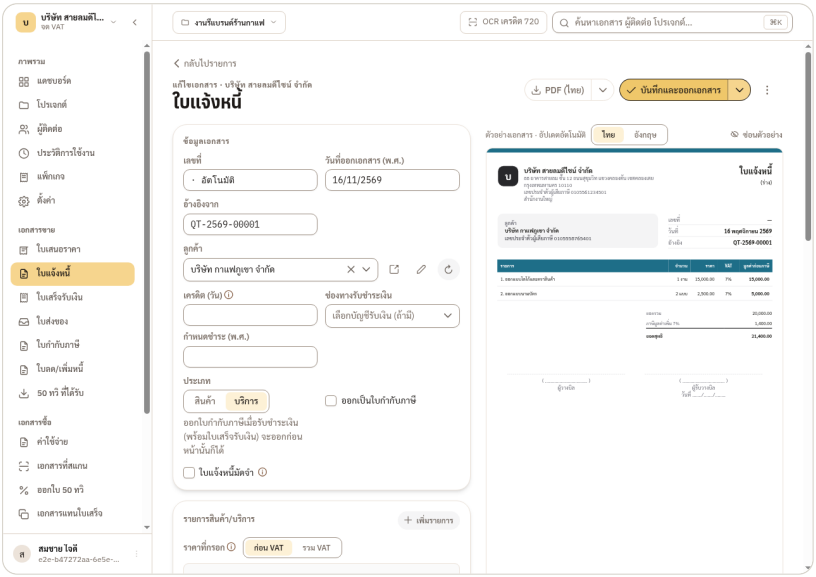
> ✦ **Tip**
>
> The **ทำเครื่องหมายว่าลูกค้าตอบรับ** button in a quotation's ⋮ menu is only a reminder for you. It does not print on the document and it does not unlock or block any other step.

5.3 Step 2: issue an invoice

An invoice bills the agreed work and carries a due date. Once the customer accepts the quotation, create the invoice from it.

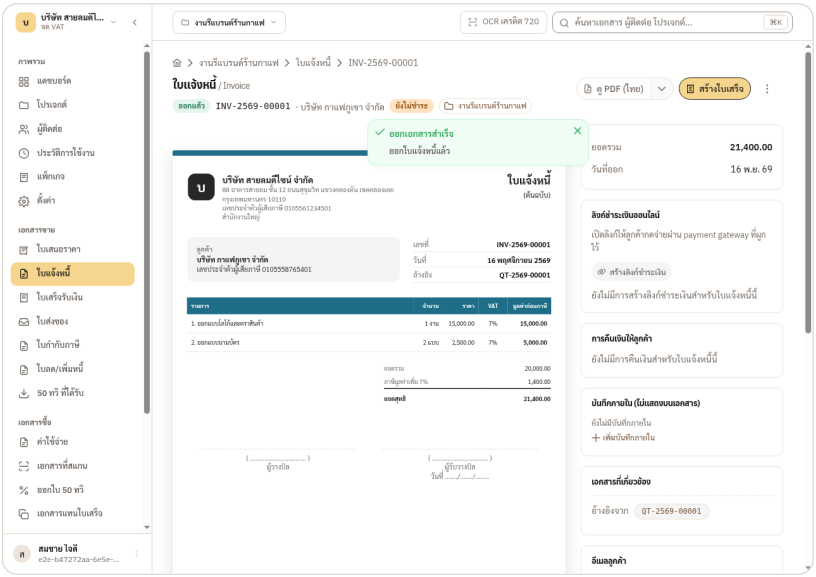
1. Open the issued quotation and press **สร้างใบแจ้งหนี้จากใบนี้**.

   → **You should see** You get a draft invoice. The customer and the lines are copied over, and an **อ้างอิงจาก** line shows which quotation it came from.



2 Change lines or prices if you need to, set the credit days or the due date, then press **บันทึกและออกเอกสาร**.

> → **You should see** The invoice gets a number such as INV-2569-00001 and a **ยังไม่ชำระ** tag.



What to know about converting

- Converting copies the customer and lines into an editable draft. A later edit to the quotation does not change the invoice.
- The quotation is not cancelled and keeps its number, but once an issued invoice refers to it, its amount fields cannot be edited. One quotation can have several invoices, for example when you bill in instalments.
- If a draft invoice from this quotation already exists, EZer asks whether to open it or make a new one.

- You can skip the quotation. Press **ใบแจ้งหนี้ใหม่** in the invoice list and fill the form as in step 1, or press **สร้างจากใบเสนอราคา** to pick a quotation from a list.

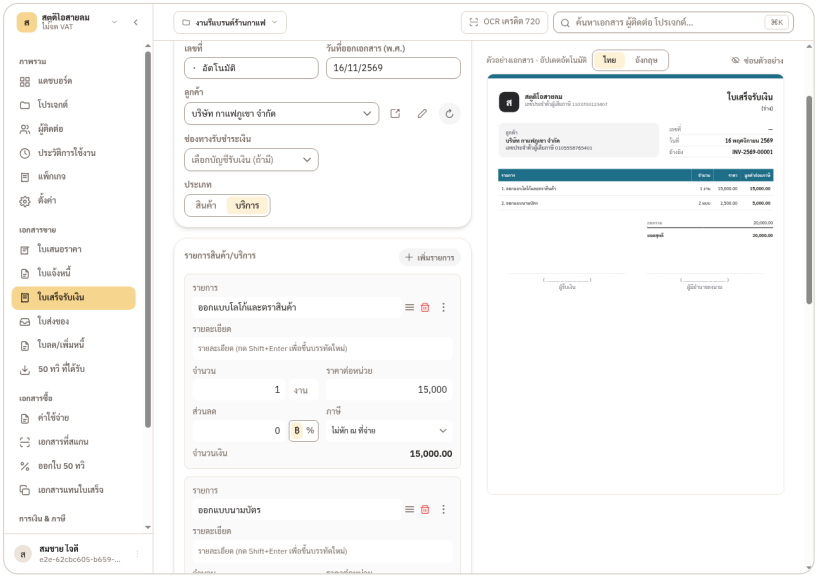
> **Caution**
>
> VAT-registered businesses: if you tick **ออกเป็นใบกำกับภาษี** on an invoice, the output VAT falls due from the issue date even though you have not been paid. EZer warns you first.

5.4 Step 3: issue a receipt when you are paid

A receipt proves you have been paid, and it is where EZer records the payment against an invoice. An invoice has no "paid" button for you to tick.

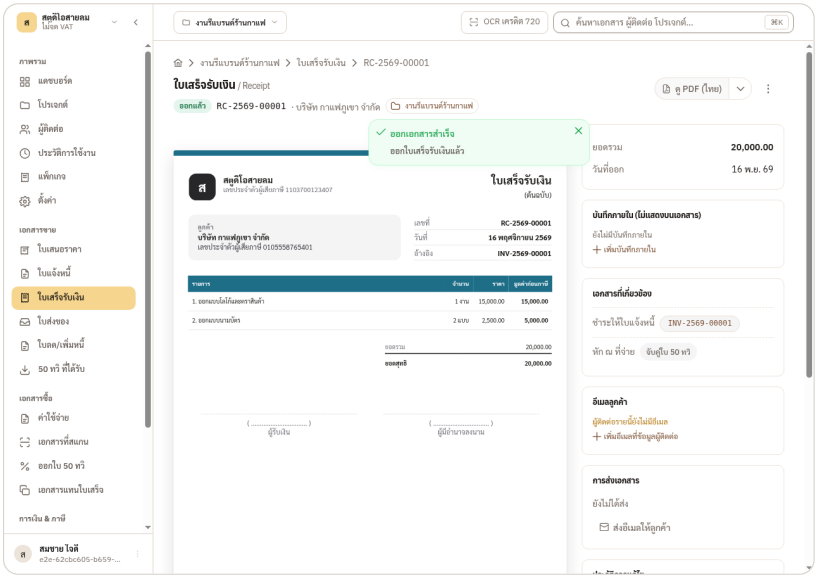
1. Open the invoice and press **สร้างใบเสร็จ**.

   → **You should see** You get a draft receipt that copies the invoice's lines and its full amount.



2 Check the amount, then press **บันทึกและออกเอกสาร**.

> → **You should see** The receipt gets a number such as RC-2569-00001, and the invoice turns **ชำระแล้ว** on its own.



When the customer pays only part

A receipt made from an invoice starts with the full amount. If the customer pays only part, change the price of the lines on the draft receipt to the amount received before you issue it. The invoice then shows **ชำระบางส่วน** with a balance left. EZer refuses a receipt larger than the outstanding balance.

EZer works out the paid status from receipts that are issued and not cancelled. A draft receipt does not count. **เกินกำหนดชำระ** shows once the due date has passed and money is still owed. Due today is not yet overdue.

EZer does not check that the money reached your account. The receipt is your own statement, so issue it only once you have been paid.

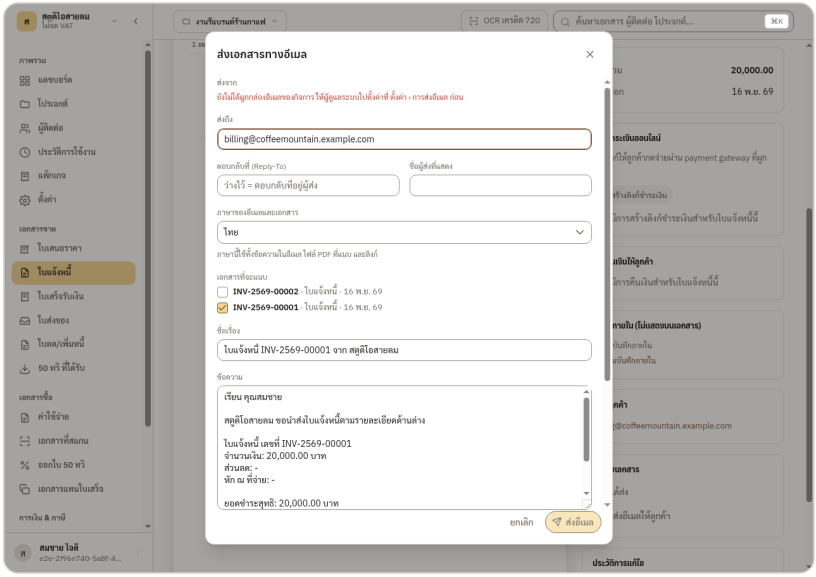
5.5 Send the document to your customer

Issuing a document does not deliver it. EZer gives you two ways to get it to the customer.

- **Download the PDF.** Press **ดู PDF** on the document page, choose Thai, English or bilingual, and send the file through whatever channel you already use.
- **Send an email from EZer.** Press **ส่งอีเมลให้ลูกค้า**. EZer attaches the PDF and adds links that work for 30 days. The button works once the document is issued and has a customer. Only the manager and sales can use it. If an admin has not bound the business mailbox, the send window says so.

1. Check the recipient and the wording EZer wrote for you, then press **ส่งอีเมล**.

   > → **You should see** An email that has left EZer cannot be recalled, so check the address first.



The **การส่งเอกสาร** card on the document page records where the document went. It does not confirm that the recipient received it.

> **Caution**
> The **ล็อกเอกสารนี้** button does not send the document to the customer. It locks the document at once. See the next section.

5.6 Edit an issued document, and when it locks

An issued document stays editable under the same number. Press **แก้ไข**. The main button now reads **บันทึก**, which saves over the old version and does not issue again. If you issued by mistake, use **ดึงกลับเป็นร่าง** to return it to a draft that keeps its number. This works until it is locked and while no issued document refers to it, such as a receipt of the invoice or an invoice of the quotation.

You can edit until the document locks. Two things lock it: pressing **ล็อกเอกสารนี้** on that document (the manager and the auditor only; other roles may see the button but EZer refuses them; quotations have no such button), or closing the month, which locks every record of that month at once.

One more partial lock: once an issued receipt refers to an invoice (even a part payment), the fields about amounts cannot change, but the item names and details still can.

> **Caution**
>
> A locked document cannot be edited. If an amount is wrong, issue a credit or debit note instead. If you really must change the document, the manager or the auditor can press **ปลดล็อก**, and the document stays editable until it is locked again. Every edit is recorded, and you should tell your accountant.

If you no longer want a document and it is not yet locked, use **ยกเลิกเอกสาร**. A cancelled invoice cannot get a new receipt, and if a receipt is already issued, deal with that receipt first. Its number is kept and never reused. If you must issue it again, EZer gives a new number.

PART B DAILY WORK · CHAPTER 6

Receipt rules

> A receipt that is also a tax invoice, how a full one differs from an abbreviated one, and recording the gap in a payment.

6.1 A receipt that is a tax invoice

Tick "issue as a tax invoice" on a receipt. Which kind of tax invoice you get depends on whether the receipt names a customer.

- A customer is named: a full tax invoice under section 86/4, which needs the buyer's 13-digit tax ID. It uses the RC number series.
- No customer is named: an abbreviated tax invoice under section 86/6, which needs no buyer name or tax ID. It uses its own ATI number series.
- The buyer has no tax ID, or does not need a full one: choose "None (cash sale)" and tick, for an abbreviated one. If the buyer needs a full one, choose the customer first.

> Once numbered, the number says which document it is. Ticking or unticking, or naming or removing the customer, would swap the document, and the number cannot follow. A full one may name a different customer but cannot drop the customer. An abbreviated one cannot name a customer. Correct it with a credit or debit note instead.

6.2 A buyer with an abbreviated tax invoice asks for a full one

The steps depend on where the abbreviated tax invoice came from. The document page says which steps apply.

- From an online cash sale: open its menu, choose "Issue a full tax invoice instead" and pick the buyer. EZer cancels the abbreviated one and issues a full one with the same amount and date.
- One you issued yourself: cancel it, duplicate it, pick the buyer, tick "issue as a tax invoice" and issue it. The duplicate keeps the original date. Keep that date.
- One sent to the accounting office: unlock it first, then follow the steps above.
- A closed month: you cannot do this in the app. A person who keeps the books must decide.

> Cancelling an abbreviated tax invoice and issuing a full one is our reading of Revenue Department practice. A tax expert has not confirmed it, and this includes the date on the full one. The buyer may also keep the abbreviated one.

6.3 VAT 0% for a foreign client

Revenue Code section 80/1 zero-rates exported goods, and services done in Thailand but used abroad.

When the contact is a foreign company or a foreigner and a line charges 7% VAT, the editor asks you to check. EZer does not change the rate for you, because not every foreign client qualifies.

- Goods that really leave Thailand: set that line to VAT 0%. Goods delivered in Thailand keep 7% VAT, even for a foreign company.
- A service the client uses abroad: set that line to VAT 0%.
- A service used in Thailand, such as work for the client's Thai branch: keep 7% VAT, even for a foreign company.

> A wrong 0% leaves output VAT short. A wrong 7% makes the client pay VAT it does not owe. If you are not sure, ask your accountant.

6.4 Payment adjustments

Records the gap between the receipt and what reaches the bank, such as a transfer fee or rounding. Pick a direction for each row.

- "Deduct": money that left. It books as other expense.
- "Add": money that arrived. It books as other income.

Both reach the Project's profit. Neither changes the total, VAT or withholding tax.

PART B DAILY WORK · CHAPTER 7

Record an expense by LINE or by upload

> Send a photo of a bill by LINE or upload it on the web, let EZer help read it, then check it and save it as a cost of the project.

7.1 Two ways in, and what to remember

You can send a bill into EZer two ways: send a photo or file by LINE, or upload it on the web from the expenses (ค่าใช้จ่าย) page. Both do the same thing first. They store the file and let EZer help read the bill.

> **Caution**
>
> A file you send in is not yet an expense. It becomes one when you check it and press **บันทึกค่าใช้จ่าย** on the form. The project's profit changes then, not when you send the file. The LINE message "บันทึกไฟล์แล้ว" means only that the file is stored.

EZer helps read the bill and does not decide for you. It can read wrongly, so always compare the form with the real bill. EZer does not pick the project from what the bill says. The project comes from the LINE group you linked, from your choice, or from your choice on the form.

Uploading and saving expenses needs a role that works on documents and a package that is in use. A linked LINE group still stores files, but EZer does not read them until the business is activated and has credits. For packages and credits, see the chapter on packages and billing.

see section 17.10 **Packages and billing**(page 177)

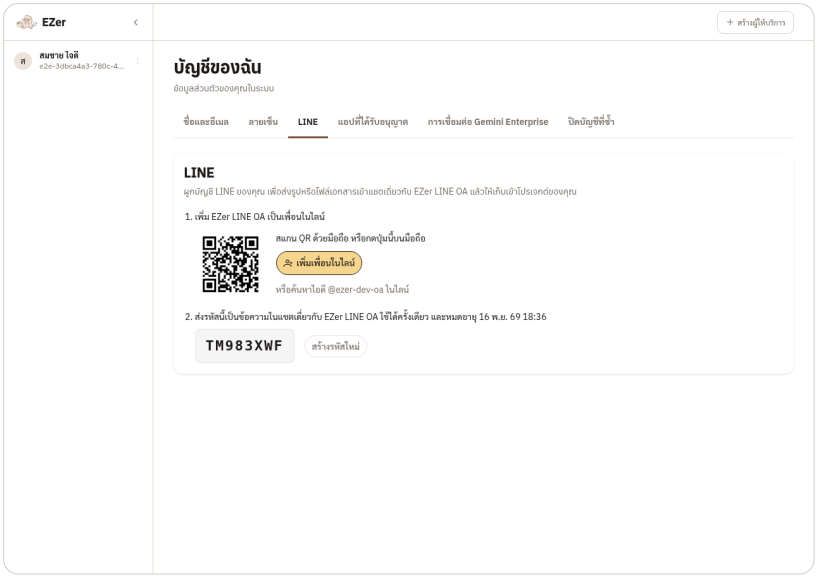
7.2 Link your LINE

There are two kinds. The first links your own LINE account, so you send bills in a one-to-one chat with the EZer LINE OA. The second links a LINE group to a project, so anyone in the group can send bills, even without an EZer account.

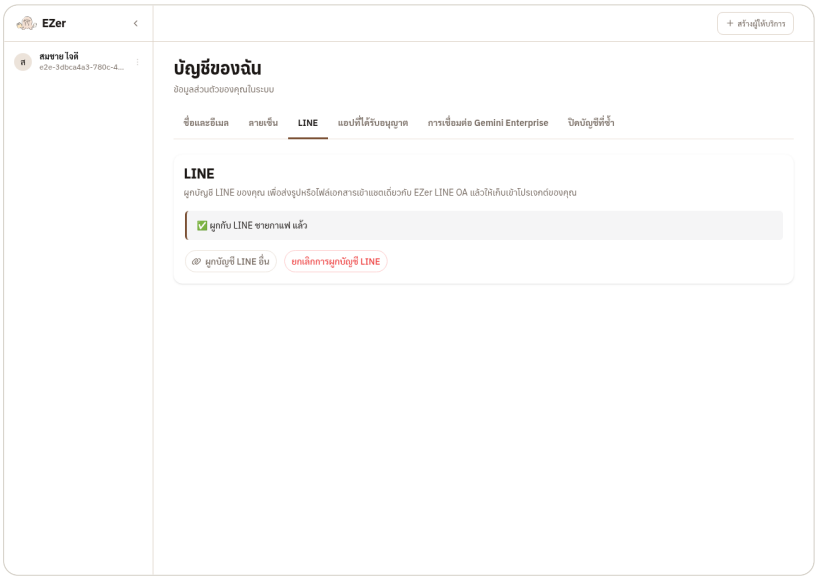
Link your own account

1. On your account page, open the **LINE** tab and press **ผูกบัญชี LINE**. Add the EZer LINE OA as a friend, then send the code you see as a message in the one-to-one chat.

   → **You should see** The code works once and expires in 15 minutes.

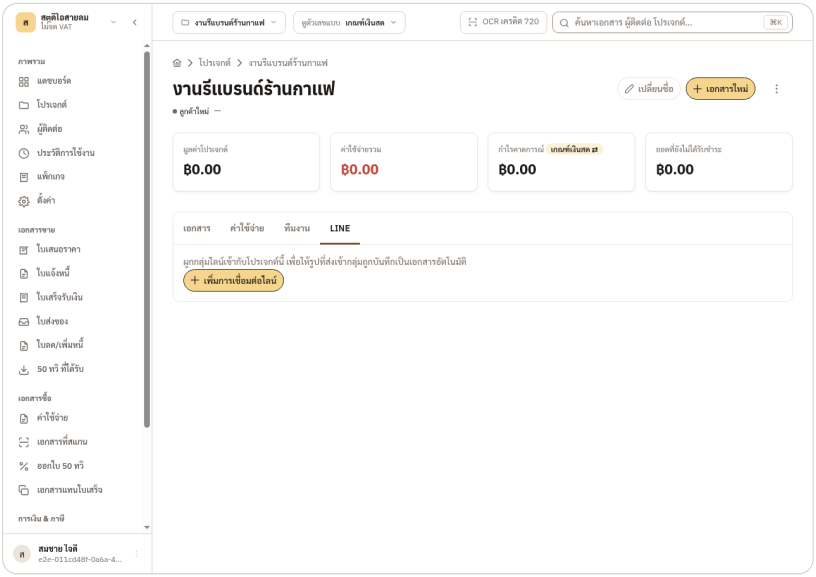


2 Wait a moment. The page shows that your LINE is linked.



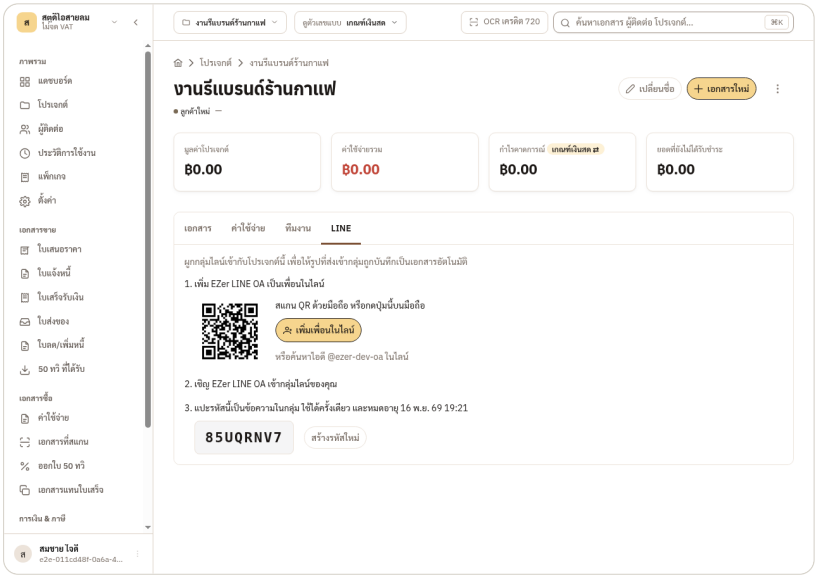
Link a LINE group to a project

1 On the project page, open the **LINE** tab and press **เพิ่มการเชื่อมต่อไลน์**.



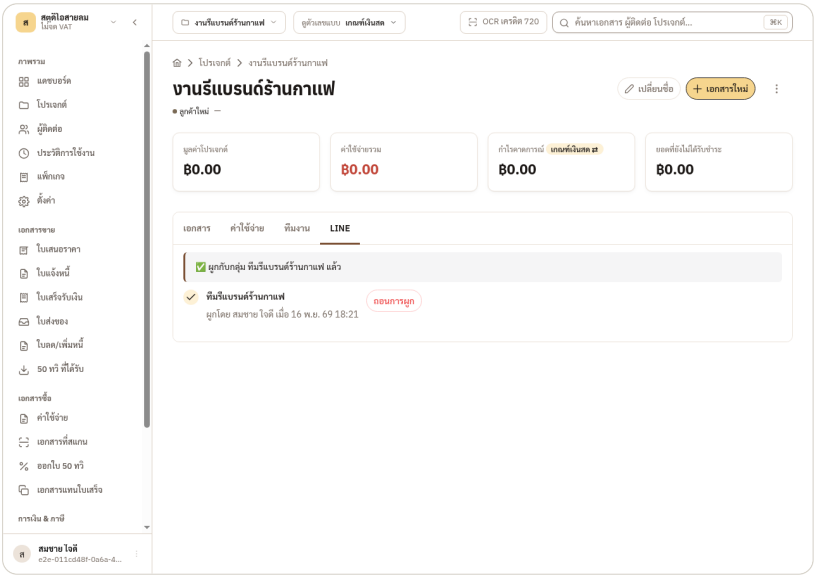
2 Invite the EZer LINE OA into the LINE group, then paste the code as a message in the group.

> → **You should see** The code works once and expires in 60 minutes. Never post your personal link code in a group.



3 The project page shows the group as linked.

> → **You should see** One project links to one group, and one group links to one project.



7.3 Send a bill by LINE

Send a photo or a PDF into the chat. EZer accepts JPEG, PNG, WebP and PDF files up to 20 MB. If you send several photos at once, the bot asks once whether to merge them into one document or keep them apart.

What the bot replies

- **บันทึกไฟล์แล้ว** with a link, **เข้ามายืนยันค่าใช้จ่ายได้ที่**. The link opens the scanned document page, not the expense form.
- If you send the same file again, the bot says the file already exists and links to the first copy.

- If EZer cannot read the file yet, for example when credits run out, the bot says why. The file is still stored, and you can fill in the expense yourself from it.

Which project the file goes to

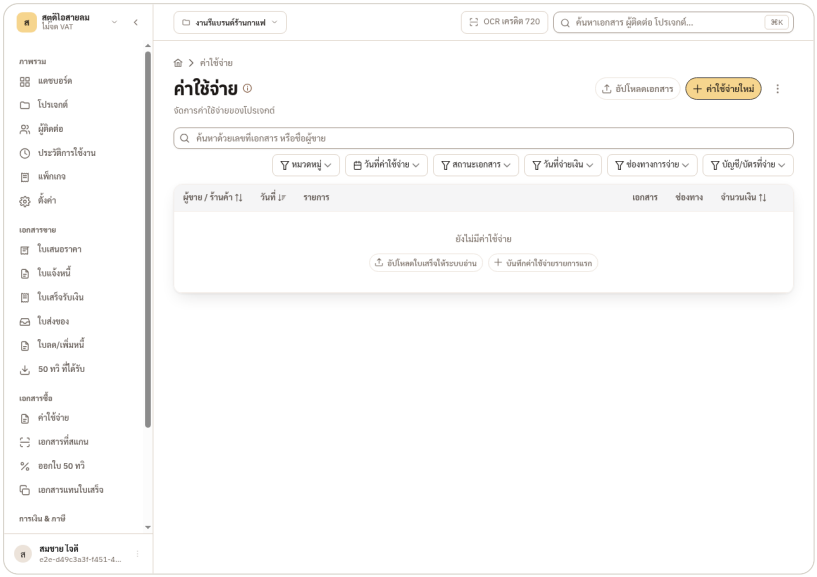
- **In a linked group**, the file goes to the project linked to that group. The sender needs no EZer account.
- **In a one-to-one chat**, you must have linked your account, be allowed to edit the business's data, and be able to see that project's expenses. If you have several projects, the bot sends a card to choose from. It remembers your choice until the chat has been silent for one hour, and files later photos in that period to the same project without asking.

> **Caution**
>
> LINE only brings files in. EZer does not create, edit or confirm an expense in the chat, and there is no command to type an expense in. You check and save on the web. In a multi-person room the bot does not answer and stores nothing. A LINE group that is not linked yet is told, once a day, that the file was not stored. Link the group to a project first. A slip from a customer paying you is not an expense, so do not send it as a bill.

7.4 Upload on the web

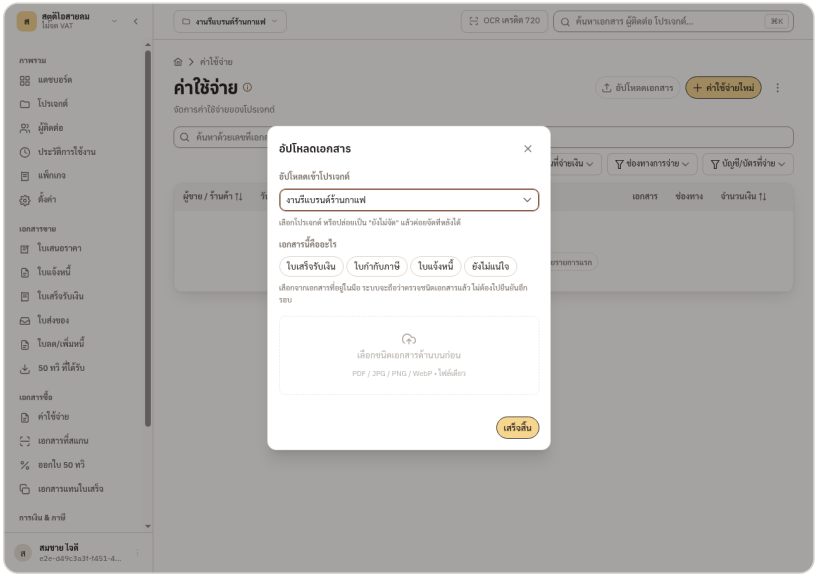
Use this when the bill is already on your computer. Open the **ค่าใช้จ่าย** page and follow these steps. The pictures use a sample file whose reading is replayed. Your own file may read differently.

1. On the expenses page, press **อัปโหลดเอกสาร**. If the list is empty, press **อัปโหลดใบเสร็จให้ระบบอ่าน**.



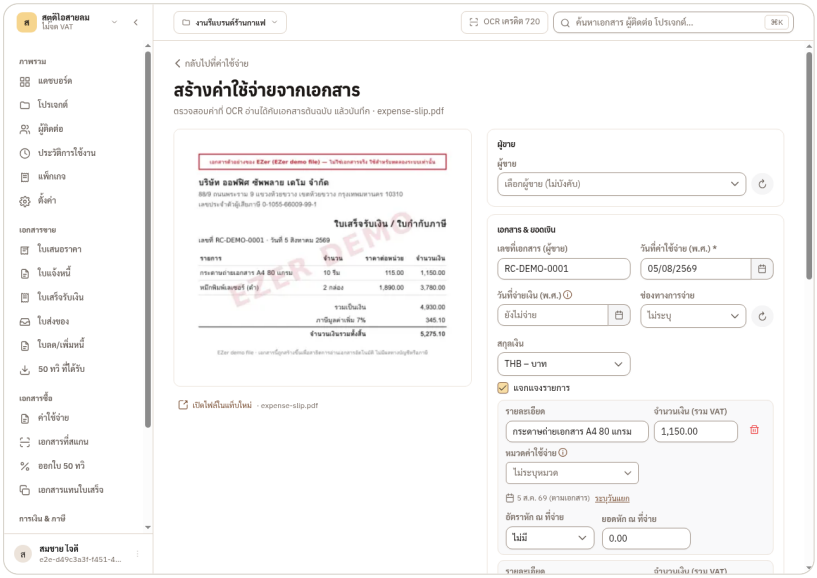
2 In the upload window, choose the project under **อัปโหลดเข้าโปรเจกต์**, then the kind under **เอกสารนี้คืออะไร**: **ใบเสร็จรับเงิน**, **ใบกำกับภาษี**, **ใบแจ้งหนี้** or **ยังไม่แน่ใจ**. Pick the kind first, because the drop area stays inactive until you do. Then drop the file or click to choose it.

> → **You should see** This window takes one file at a time. For many files, upload on the scanned documents page.

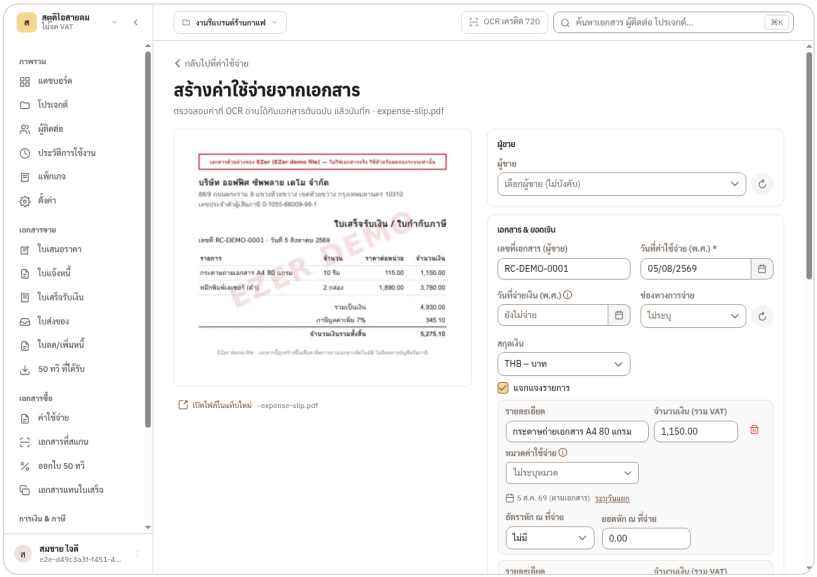


3 EZer takes you to the **สร้างค่าใช้จ่ายจากเอกสาร** form and starts reading the document.

> → **You should see** The form fills itself when the reading ends. You do not refresh the page. If EZer cannot read the file, the form says why and you fill it in yourself.

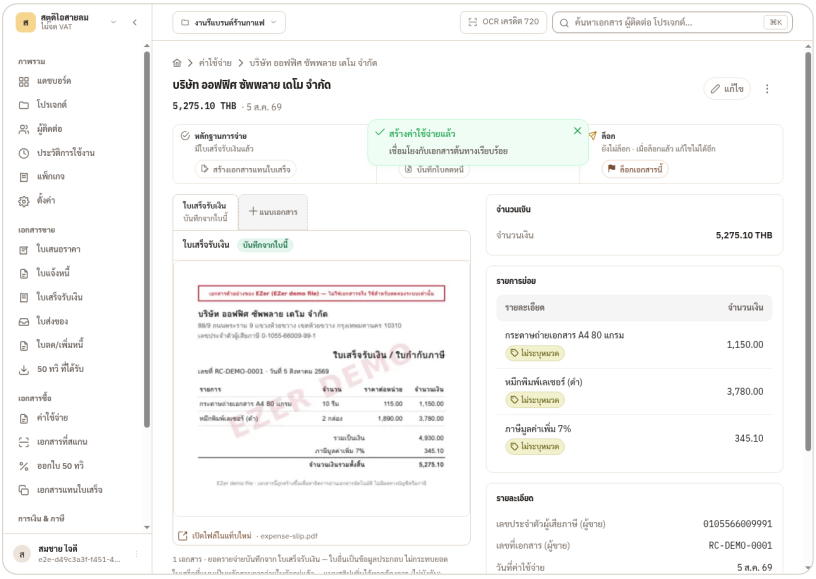


4 Compare every field with the real bill, especially the vendor, document number, date, amounts, VAT and withholding tax. Choose the project and the category yourself.



5 Press **บันทึกค่าใช้จ่าย**.

> → **You should see** You get an expense tied to its source file, and the project's profit changes from now on.



What EZer fills in and what it leaves

EZer fills in:

- the lines (one per printed row), the vendor's name and tax ID, the document number, withholding tax per line, input VAT (if the business is VAT-registered; if not, EZer folds the VAT into the cost), the date and the currency.
- If a transfer slip is in the same file, it also fills in the paid date and the payment channel.

EZer leaves these to you:

- whether it is an asset, non-deductible costs (รายจ่ายต้องห้าม), the withholding condition, the input VAT type and evidence, and the project. OCR does not read the category, but the form may suggest or fill one from the vendor's history. Always check it.
- EZer never overwrites what you typed. If the reading ends later, a **ใช้ข้อมูลจาก OCR** button lets you apply it yourself.

If the bill's lines do not add up to the printed total, EZer uses the total as one line and tells you. To itemise, fill in the lines yourself. An invoice is normally not yet a cost, so record the expense when you have the receipt or tax invoice.

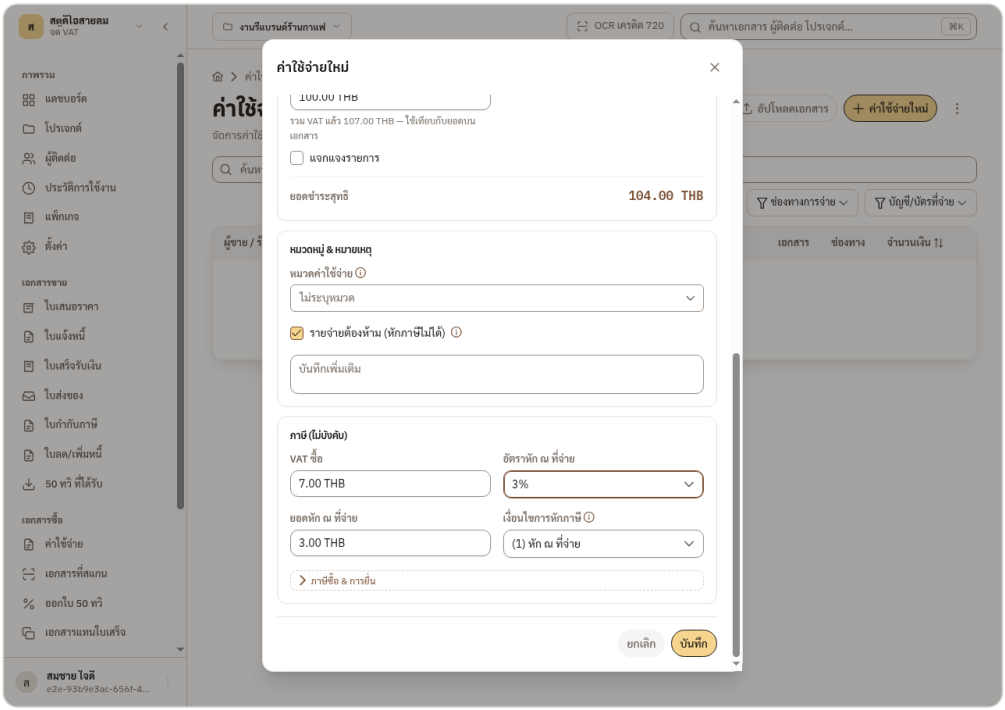


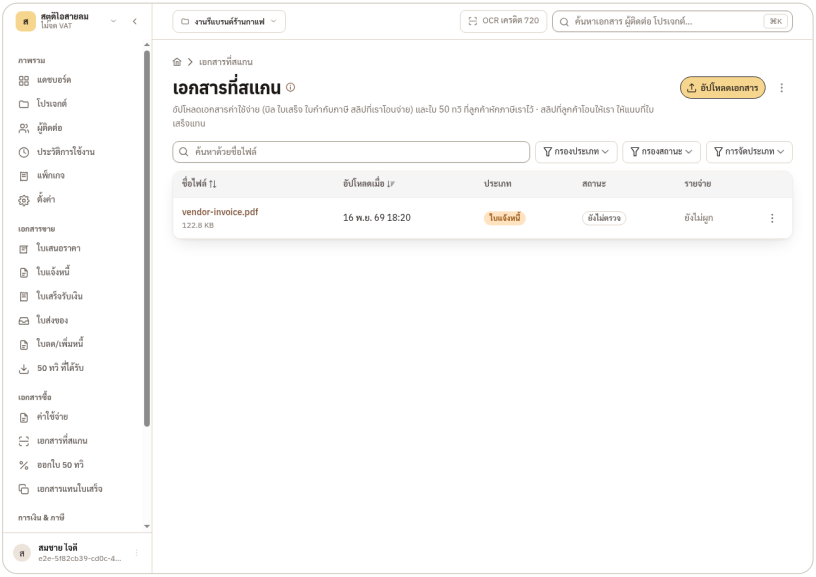
Figure 7-1 Input VAT and withholding tax sit in the same form, and EZer works out the net payable.

Expense rules(page 70)

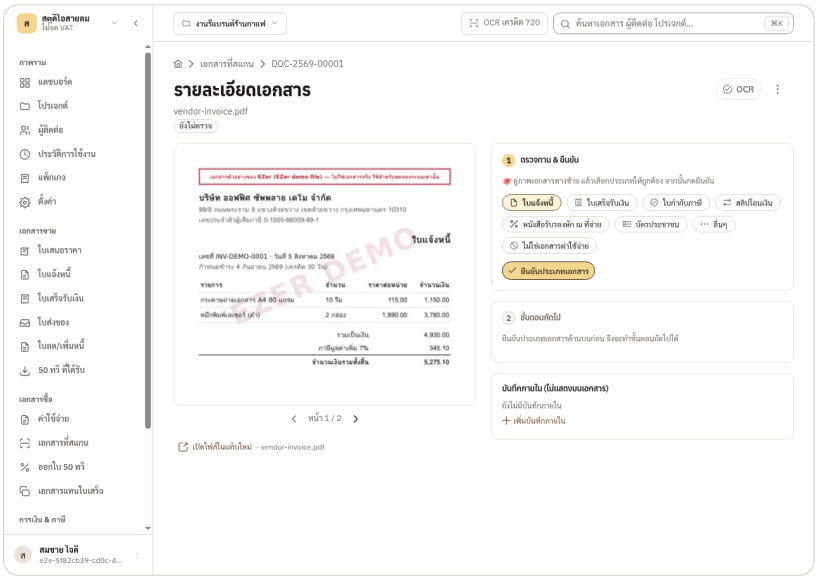
7.5 Files from LINE waiting for your check

Files sent by LINE wait under the **เอกสารที่สแกน** menu, and the link the bot sends brings you here. A file with no declared kind starts as **ยังไม่ตรวจ**. EZer guesses the kind, and you look at the image and confirm it yourself.

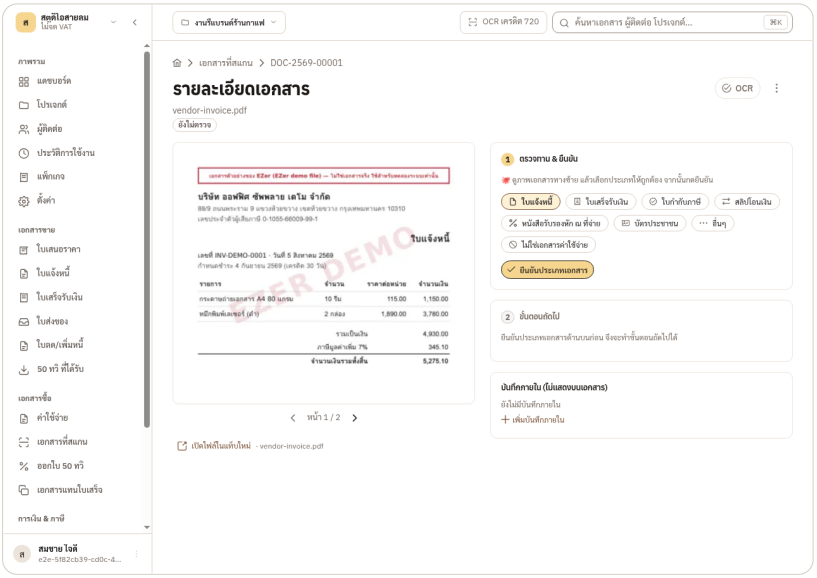
1. Open the **เอกสารที่สแกน** menu and find the unchecked file.



2 Open the file and look at the image on the left.

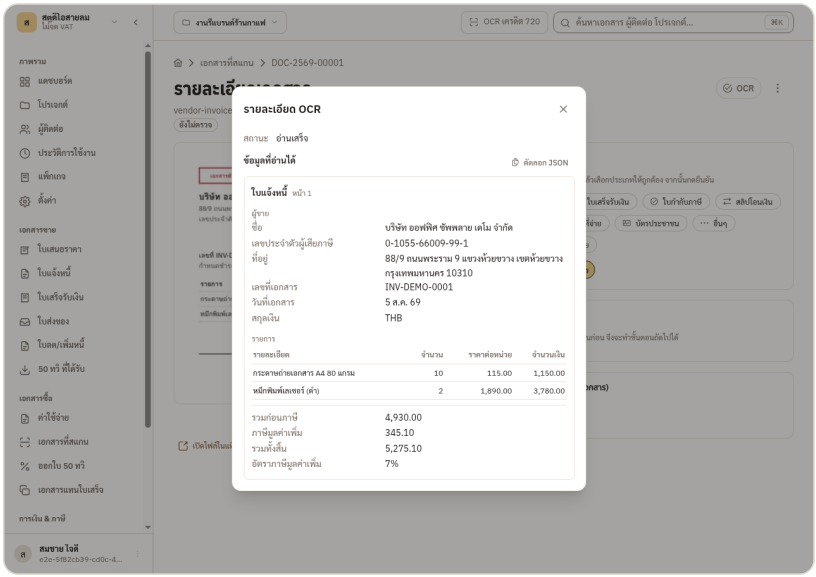


3 See the kind EZer guessed. If it is wrong, choose the right kind, then press **ยืนยันประเภทเอกสาร**.



4 Press the **OCR** button in the page header to open **รายละเอียด OCR** and see what EZer read.

> → **You should see** Then press **สร้างค่าใช้จ่ายจากเอกสารนี้** to open the same form as in the upload steps above.

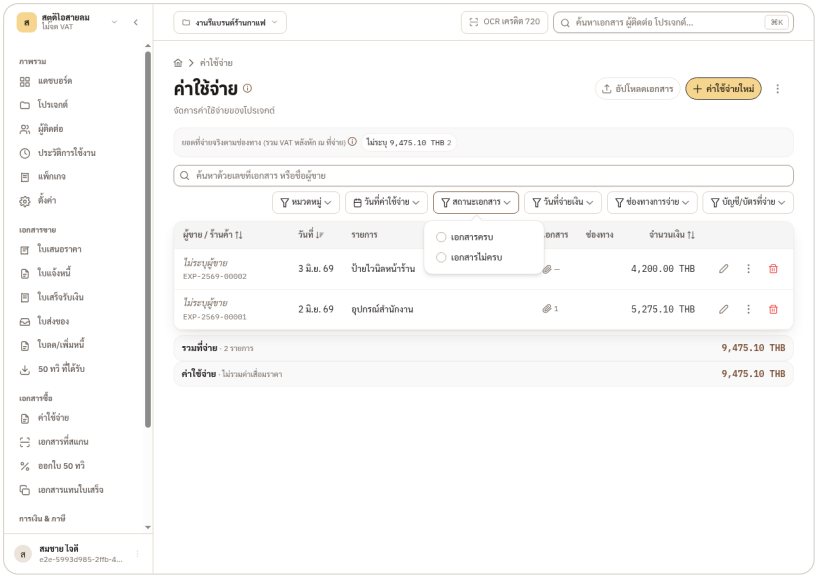


When you press **สร้างค่าใช้จ่ายจากเอกสารนี้**, if the document was already saved, EZer warns you to save again only if the file holds several bills. If it is already attached to an expense, EZer warns that the amount would be counted twice. When you save, if an expense with the same vendor, document number and amount exists, EZer warns **อาจบันทึกซ้ำ**. The warning only advises. Press **บันทึกต่อไป** if it really is a different bill.

7.6 A bill is missing or incomplete

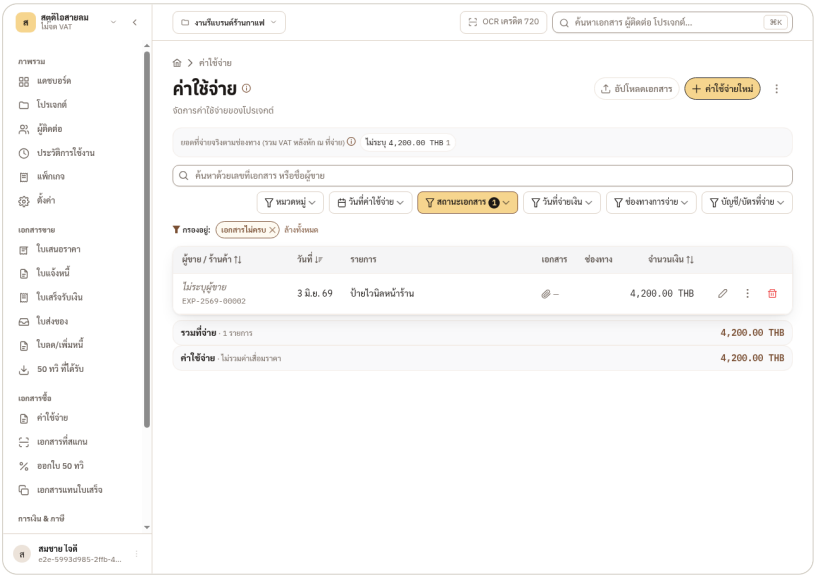
The expense detail page warns when no payment proof is attached. Attach the slip with the **แนบเอกสาร** button. If the source file is already a receipt, the warning softens, because a receipt is its own proof of payment.

1. On the expense list, open the **สถานะเอกสาร** filter and choose **เอกสารไม่ครบ**.



2 The list shows only the expenses that still have no receipt or tax invoice.

> → **You should see** เอกสารครบ means a receipt or a tax invoice is on file. A transfer slip alone does not count.



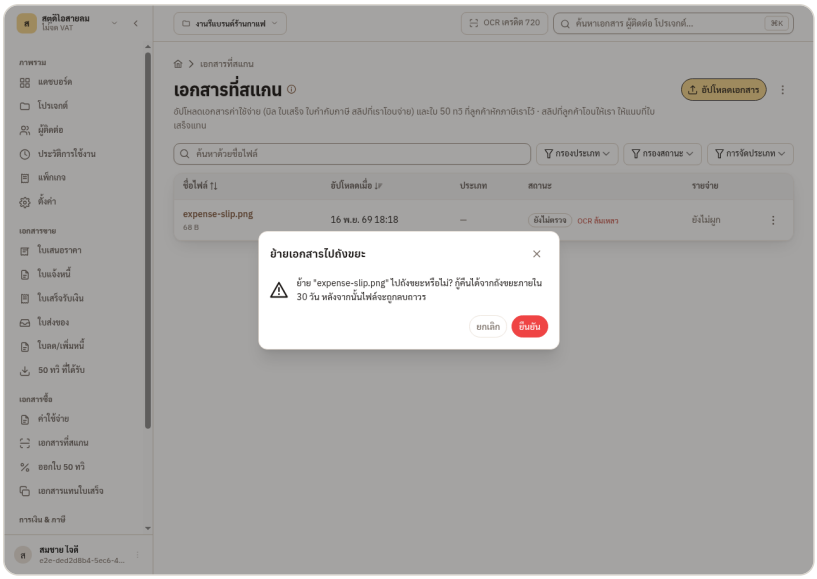
If the vendor gives no receipt, EZer helps you prepare a payment voucher (ใบสำคัญรับเงิน) or a receipt substitute (ใบแทนใบเสร็จรับเงิน). Use it only when the payment really happened. The 2,000 baht line that EZer warns at is EZer's own guideline and cites no statute, and it is a warning, not a tax ruling.

7.7 Sent the wrong file or want to change something

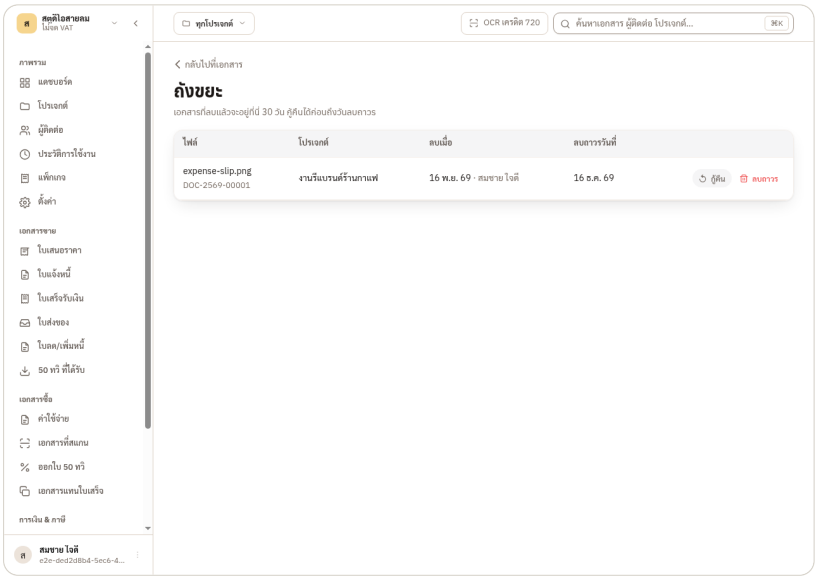
Delete a wrong file under the **เอกสารที่สแกน** menu. A file that is locked, or attached as an expense's evidence, cannot be deleted until you detach it. It

moves to the trash and you can restore it within 30 days. After that it is deleted for good.

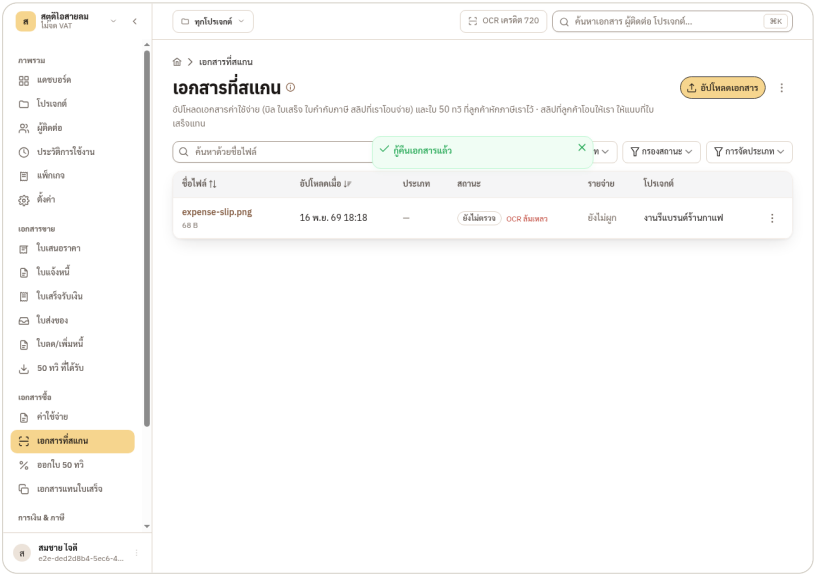
1 Delete the file and confirm the move to the trash.



2 See the deleted file in the trash.



3 Press **กู้คืน**. The file returns to the list.



> **Caution**
>
> Deleting an expense has no trash. EZer asks you to confirm and then deletes it for good, though the source file stays. It also deletes any assets created from its lines. You can edit an expense until you press **ล็อกเอกสารนี้** or close the month. After that the expense is locked until someone with permission unlocks it.

PART B DAILY WORK · CHAPTER 8

Expense rules

> Non-deductible expenses, assets, and the payee name on a receipt substitute: what the system does, and what stays your call.

8.1 Non-deductible expenses

Tick non-deductible when the Revenue Department will not accept the cost as a tax deduction, such as a fine or some kinds of entertainment expense.

- It still counts as a real business cost as usual. The flag only sets it apart for your accountant when they work out tax.
- An expense category can set this as a default: picking the category then ticks it for you, and you can always change it on each expense.
- Changing a category's default later never rewrites an expense already recorded.

> EZer does not judge which expenses qualify. It is your own call. Ask your accountant when unsure.

8.2 Assets

A thing that lasts beyond one accounting period is an asset. For tax, its cost is deducted as depreciation, not as one expense (Revenue Code, section 65 ter (5)).

EZer does not use the price as a test. A cheap thing that lasts for years, such as a ฿300 mouse, also goes under an asset category. Ask your accountant when unsure.

The system decides from each line's category, not from the price or the item name. You cannot change this per line. If the category is wrong, change the category of that line. The system refuses the change if the expense is locked, or if the asset has depreciation in a closed month.

These 5 standard categories are assets from the start. Each useful life is a policy default (inside the legal ceiling), and you cannot edit it.

Category	Useful life
อุปกรณ์สำนักงาน	60 months
เครื่องตกแต่ง/เฟอร์นิเจอร์	120 months
เครื่องจักร/เครื่องมือ	120 months
คอมพิวเตอร์/แกดเจ็ต	36 months
ส่วนต่อเติมอาคาร/งานระบบ	240 months

When you record an expense

- When a receipt mixes different things, tick "Itemize", split it into several lines, and choose a category for each line.
- OCR reads the items on the document. It does not decide which item is an asset.

- The system may fill in the category you use most with that vendor. Check the category before you save. For example, the shop that sold you a computer may later send a repair bill.
- A line with no category, or with a category that is not an asset, books as one whole expense.

A category you create can be an asset. Turn on "This is an asset category" and set a useful life. If you choose a parent category, the subcategory follows the parent on this, but you still set its useful life. The system does not check your useful life against the legal ceiling. Ask your accountant when unsure.

After you save

- Every expense line filed under an asset category is recorded as an asset. The accrual basis writes its cost off as depreciation over its useful life. The cash basis counts it as an expense in full in the month it is paid.
- The cash basis is a management view, not a tax deduction. The tax deduction still follows depreciation. Ask your accountant when unsure.
- Each line's write-off schedule is in the asset register.
- When an asset breaks, gets lost or is sold before the end of its life, press "Stop depreciation" and choose the month it really stopped. The depreciation not yet taken books as an expense in that month, on its own line in the accrual profit and loss report: "Remaining value of retired assets".
- If that month is closed, the amount books in the first open month. If you undo the stop after the booking month closed, the first open month takes a negative amount. The total expense of the asset still equals its cost.
- The system calculates no gain or loss on a sale. If you sold the asset, record the sale money as income yourself. The two lines net to the gain or loss on the sale. Ask your accountant about the tax deduction.

- When a line is not an asset, such as a computer repair, file it under a category that fits better, such as ค่าซ่อมแซม.

8.3 Paid by channel

The expense list shows a summary of the cash actually paid through each account or card, for whatever the current filters show. It helps you check against a bank or card statement without filtering one channel at a time and adding the totals yourself.

- One row for each account or card with money in the filtered set, even an archived one, then a "Cash" row and an "Unspecified" row.
- Each row adds VAT back and takes withholding tax off, unless you absorb that tax on the vendor's behalf, so it can differ from the expense figure other pages show.
- Click any row to filter the list down to just that channel.

8.4 The payee name on a receipt substitute

The payee name is for our own register only. It is not printed on a receipt substitute, because our own disburser and approver certify that document instead (Revenue Department manual, March 2016, section 2.1.3).

When the payee cannot be identified, leave the field empty. The document still issues.

PART B DAILY WORK · CHAPTER 9

Accept online payments through a payment gateway

> Connect your business's own Stripe, Opn Payments (Omise) or K Payment Gateway account to EZer, then send your customer a payment link from an invoice. When the customer pays, EZer issues the receipt for you. This chapter goes from preparing the key to fixing common problems.

9.1 How it works

A payment gateway is a service that takes payments online, for example by card or PromptPay. You use your own business's gateway account, so the money your customer pays goes straight into your account. EZer does not hold the money for you.

The whole process has five steps

1. A manager connects the gateway account in Settings. You do this once.
2. On an issued invoice, you create a payment link and send it to the customer.
3. The customer opens the link and goes to the gateway's payment page. The customer does not need an EZer account.
4. The gateway tells EZer about the payment, and EZer then asks the gateway for the real status.
5. EZer issues the receipt, and the invoice changes to ชำระแล้ว (paid).

> The customer types card details on the gateway's page only. EZer never sees or stores them.

9.2 Who can do what

Task	Who can do it
Connect, edit, set as default or remove a gateway	The Super Admin (ผู้ดูแลหลัก) and managers (ผู้จัดการ), signed in to the app. An API key cannot do this.
Create or cancel a payment link	Anyone who can edit sales documents, such as managers, document clerks (ธุรการเอกสาร) and sales (ฝ่ายขาย), and an API key with write access.
See the status of payment links	Anyone who can see issued invoices, including viewers and auditors.

An API key cannot connect a gateway so that a leaked key cannot send your business's money to another account.

> A person without access sees a message that only a Super Admin or a Manager of this company can connect a gateway.

9.3 Prepare the Secret Key for each gateway

Before you connect, open the gateway's dashboard and copy the Secret Key. The connect dialog has a link to each gateway's key page. The key must match

the mode you choose: Test mode takes a test key, and Live mode takes a live key.

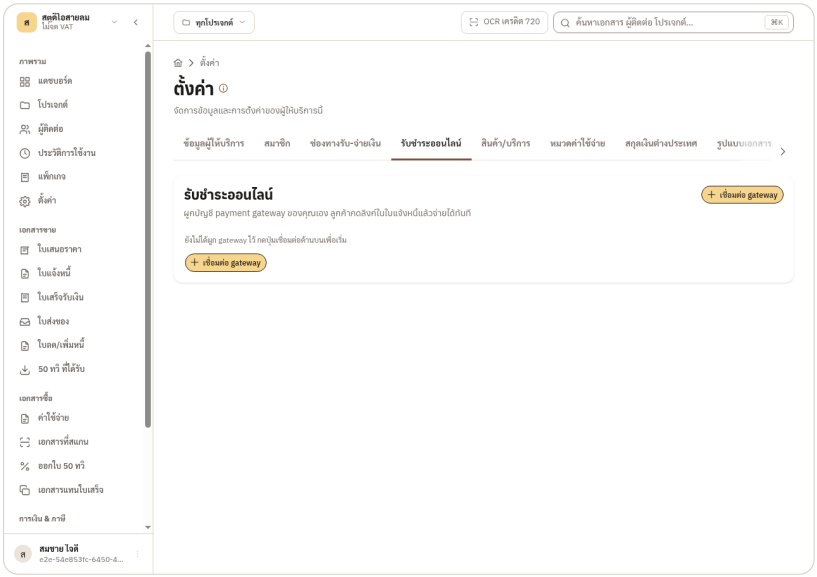
Gateway	Secret Key it accepts	Signing secret	Amount per payment
Stripe	A restricted key only, starting with rk_test_ or rk_live_, with the Checkout Sessions: Write permission. An sk_ key is refused.	Starts with whsec_	10 to 999,999.99 baht
Opn Payments (Omise)	A Secret Key, starting with skey_test_ for Test mode or skey_ for Live mode.	A base64 string from the Webhooks page of the Omise dashboard.	At least 20 baht
K Payment Gateway (KBank)	A Secret Key, starting with skey_test_ for the sandbox or skey_ for live.	Not needed. The bank checks the webhook with this connection's Secret Key.	Up to 9,999,999.99 baht

> Omise and K Payment Gateway have no restricted key. The Secret Key you give EZer can do everything in the account, including refunds. Keep this key safe, and do not send it to anyone by chat or email.

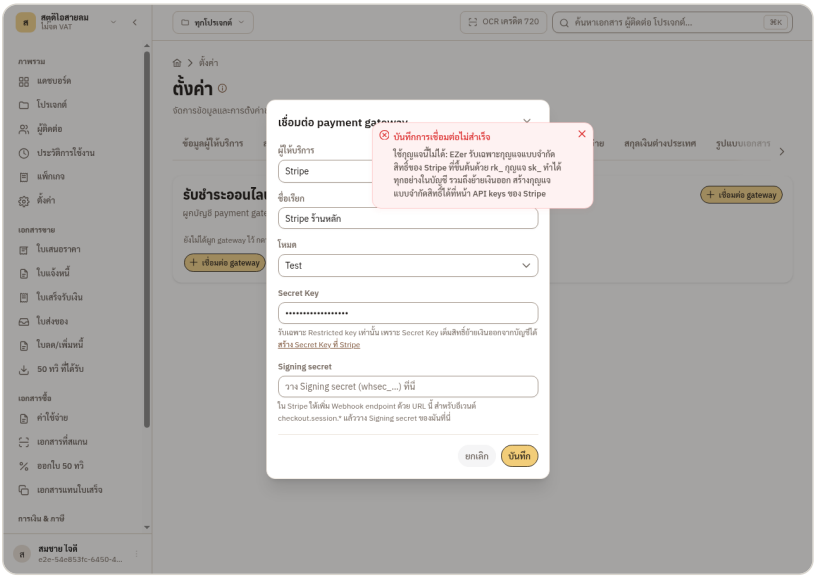
> The Omise and K Payment Gateway connections have been tested against a simulated gateway only, not against a real account. Try test mode first before you go live.

9.4 Connect a gateway

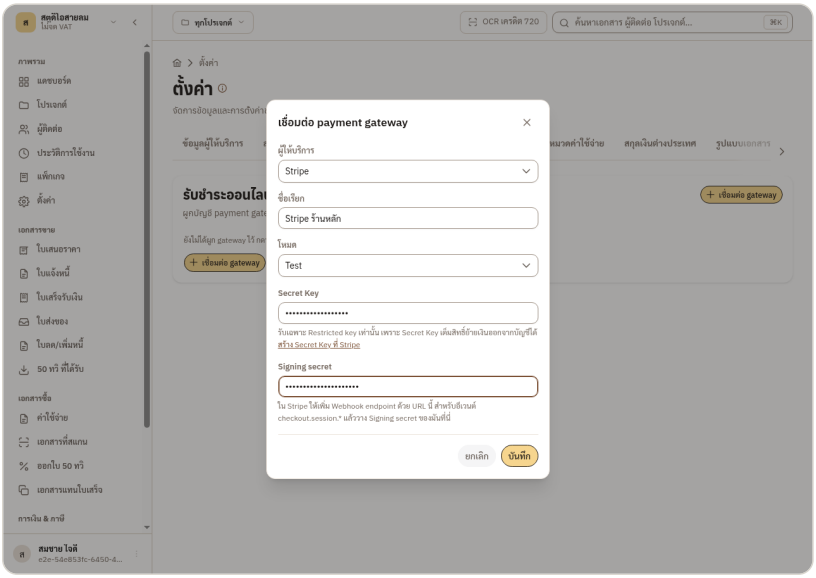
1 Go to ตั้งค่า (Settings) and open the รับชำระออนไลน์ (online payments) tab. If nothing is connected yet, press เชื่อมต่อ gateway.



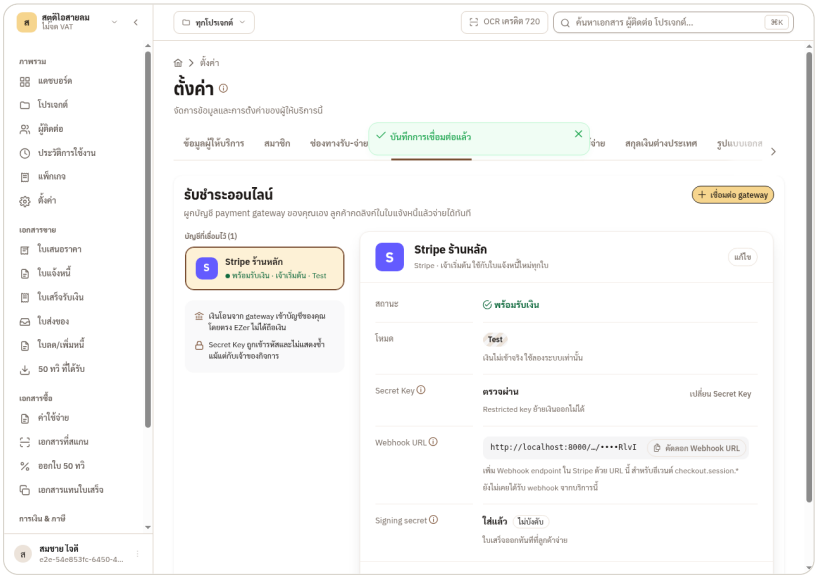
2 Choose the gateway, give it a name you will recognise, choose the mode and paste the Secret Key. If you paste a full-access Stripe key (sk_), it is refused with a message to use an rk_ key. What you typed stays in the dialog, so you only change the key.



3 For Stripe and Omise, also paste the Signing secret. Then press บันทึก (Save).



4 EZer tests the key with the gateway before it saves. If the test passes, the connection shows พร้อมรับเงิน (ready to collect). The first connection becomes the default.



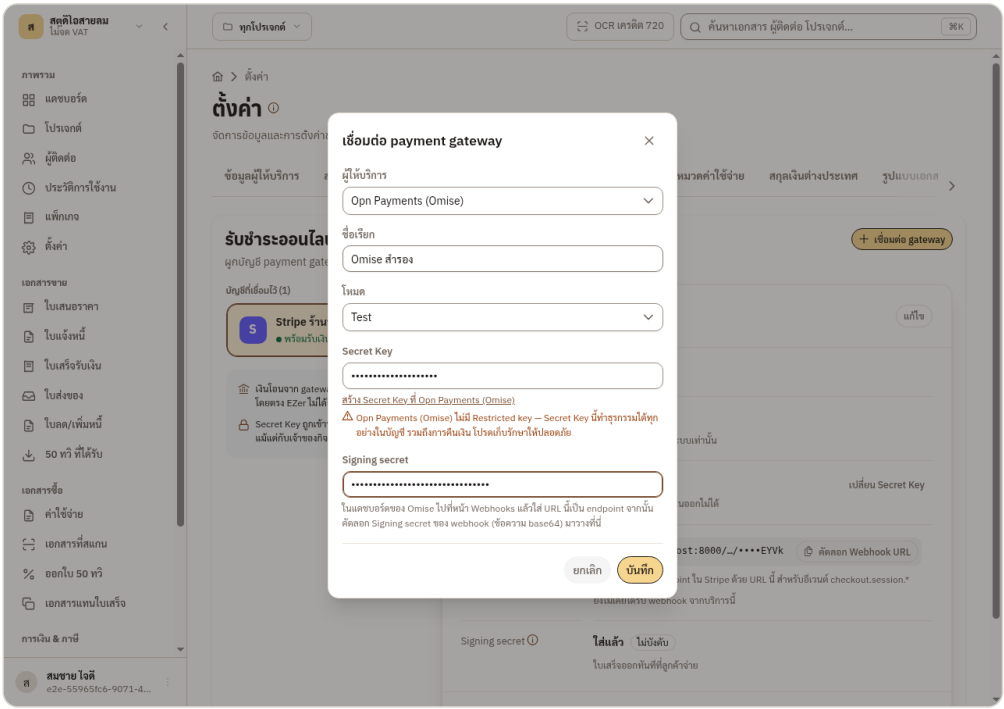


Figure 9-1 When you choose Omise, the dialog warns that this key has full access.

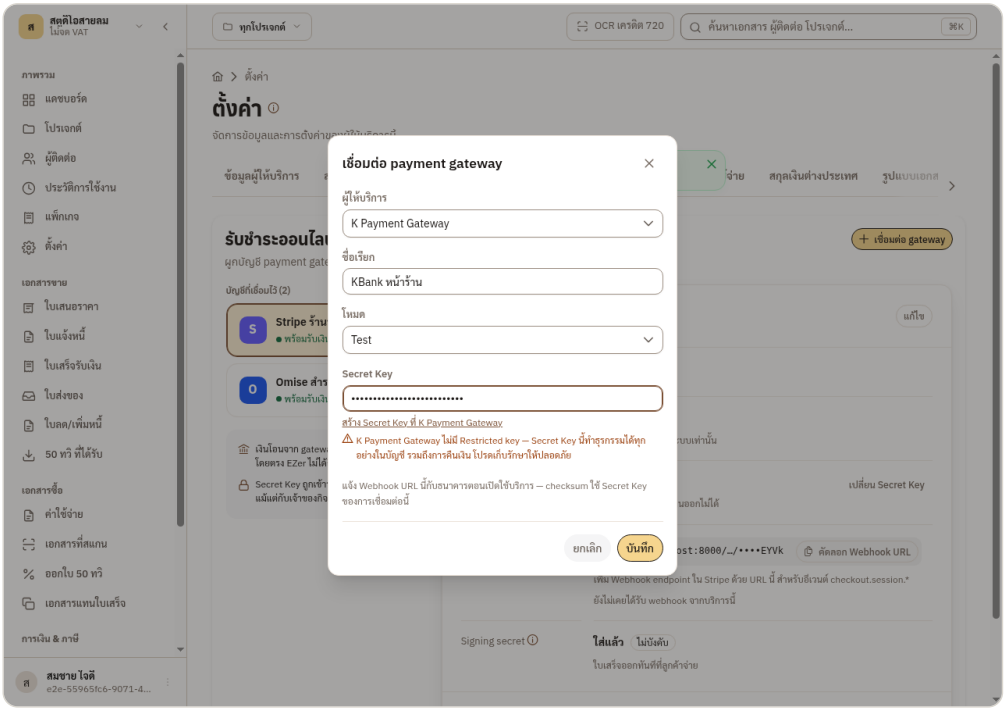


Figure 9-2 When you choose K Payment Gateway, there is no signing-secret field.

> After you save, EZer never shows the key again, not even its last few characters. To change the key, press edit and paste the new one. If you leave the field empty, the stored key stays.

9.5 Register the webhook

A webhook is how the gateway tells EZer at once that a customer paid. Each connection has its own webhook URL in the Webhook column. Press the copy button beside the URL and set it up at the gateway.

Gateway	What to do
Stripe	In the Stripe dashboard, add a Webhook endpoint with this URL for the events checkout.session.completed, checkout.session.async_payment_succeeded, checkout.session.async_payment_failed and checkout.session.expired. Then paste its Signing secret (whsec_) into the connection.
Opn Payments (Omise)	On the Webhooks page of the Omise dashboard, enter this URL. Then paste the base64 secret from the same page into the connection.
K Payment Gateway (KBank)	Give this URL to the bank when you open the service. You cannot set it yourself, and no Signing secret is needed.

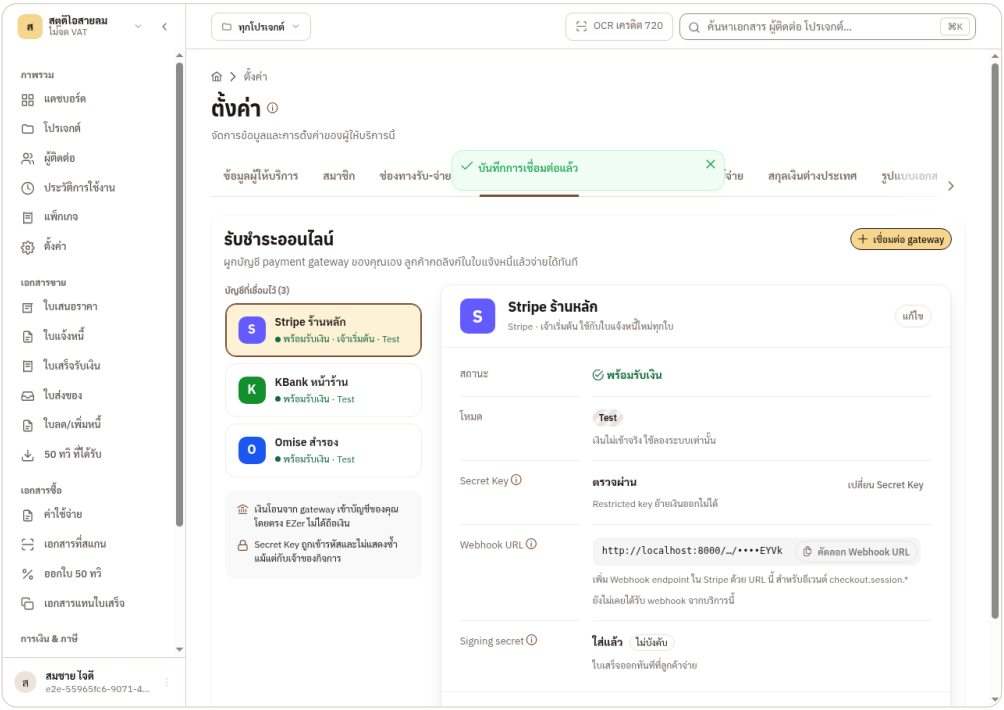


Figure 9-3 The connection list on the left, and the chosen connection's details on the right. The Webhook URL row shows a shortened URL and a copy button. The Signing secret row says whether one is set.

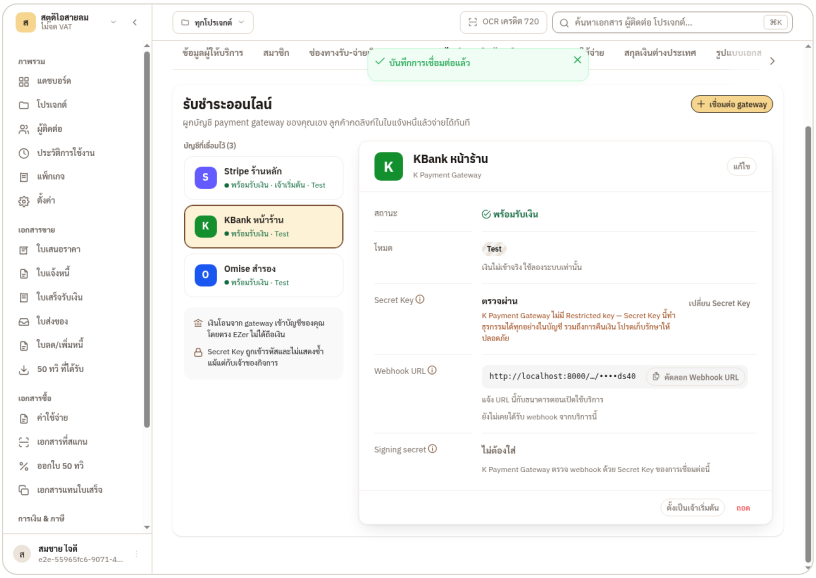
> The Signing secret is optional. Without it, Stripe and Omise payments still work, but the receipt can take up to about 5 minutes. EZer then learns about the payment from its next status check instead. The detail panel recommends that you add one.

9.6 Manage your connections

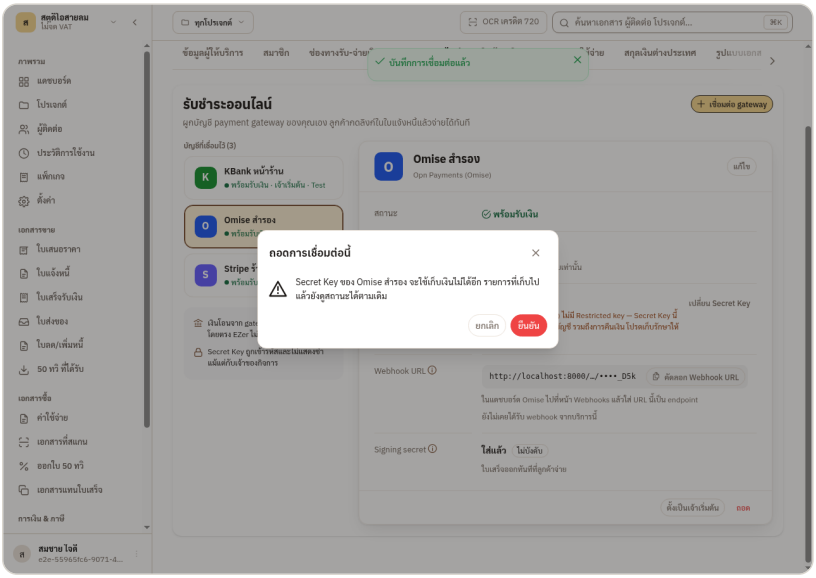
You can connect several gateway accounts at the same time, but payment links always use the default one. The customer does not choose. Each row has these buttons.

Button	What it does
ตั้งเป็นเจ้าเริ่มต้น (make default)	New payment links use this connection. The button shows only on a connection that is ready to collect and is not the default yet.
ตรวจอีกครั้ง (check again)	Tests the Secret Key with the gateway again. The button shows only on a connection whose Secret Key could not be confirmed: the gateway refused the key, or EZer could not reach the gateway. The gateway's reply shows in the red box at the top. Try this button before you make a new key.
แก้ไข (edit)	Changes the name, mode, Secret Key or Signing secret. You cannot change the gateway. A new key is tested again, and the open payment pages of this connection are closed.
ถอด (remove)	Stops this key from collecting money, and closes every pending link of this connection. Payments already collected keep their status. You are asked to confirm first.

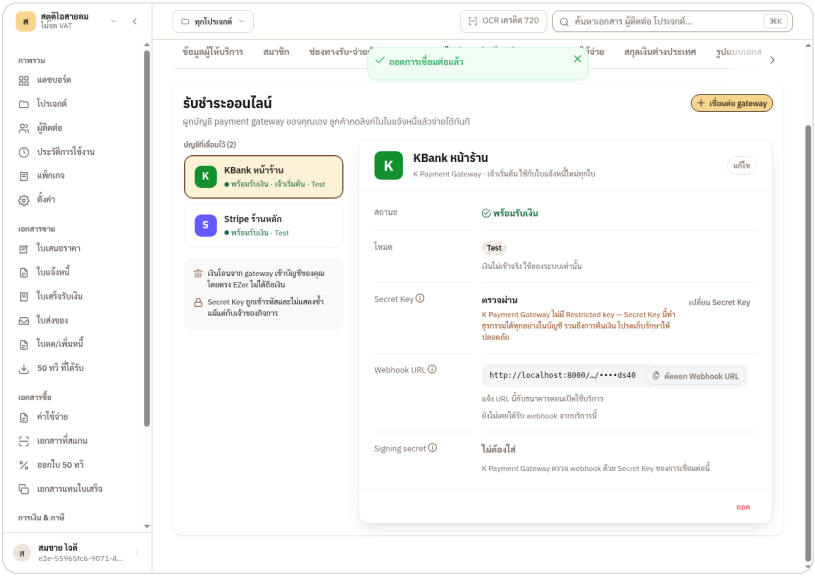
1 Press ตั้งเป็นเจ้าเริ่มต้น on the row you want. The เจ้าเริ่มต้น (default) tag moves to that row.



2 Press the bin icon to remove. The prompt names the connection. Press ยืนยัน (confirm) if it is right.



3 The removed row is no longer in the list.



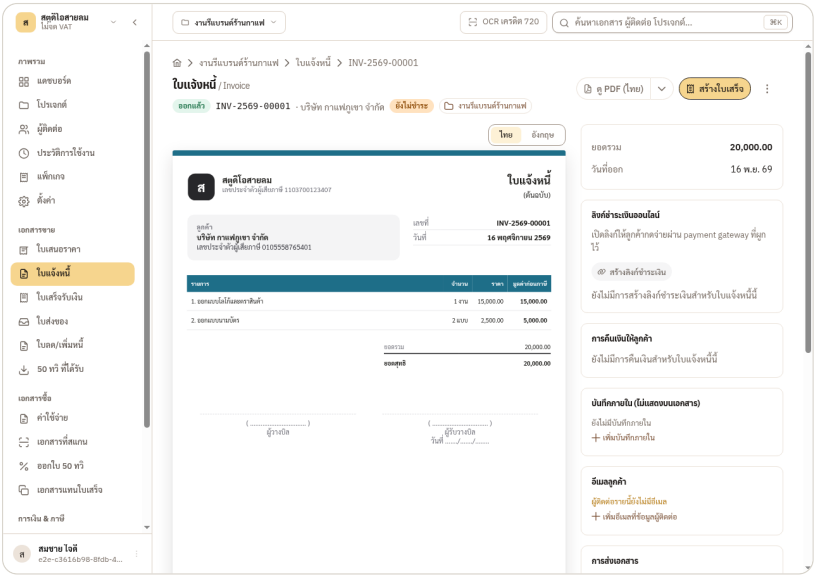
> If you remove a connection that still has pending links, customers holding those links can no longer pay. Create a new link on each invoice and send it again. Changing the default does not move existing links: they keep their own connection.

Test mode is for trying the system out, and no real money moves. When you are ready, add a new connection in live mode with a live key, and make it the default.

9.7 Create a payment link from an invoice

The ลิงก์ชำระเงินออนไลน์ (online payment link) card shows on an issued invoice only. A draft invoice cannot have a link yet.

1 Open an issued invoice. The online payment link card is on the right.



2 Press สร้างลิงก์ชำระเงิน (create payment link). EZer makes the link and tries to copy it at once, ready to paste into a chat or email to your customer. If the browser does not allow the copy, EZer warns that the link was made but could not be copied. Press คัดลอกลิงก์ (copy link) in the list on the card. Do not create the link again.

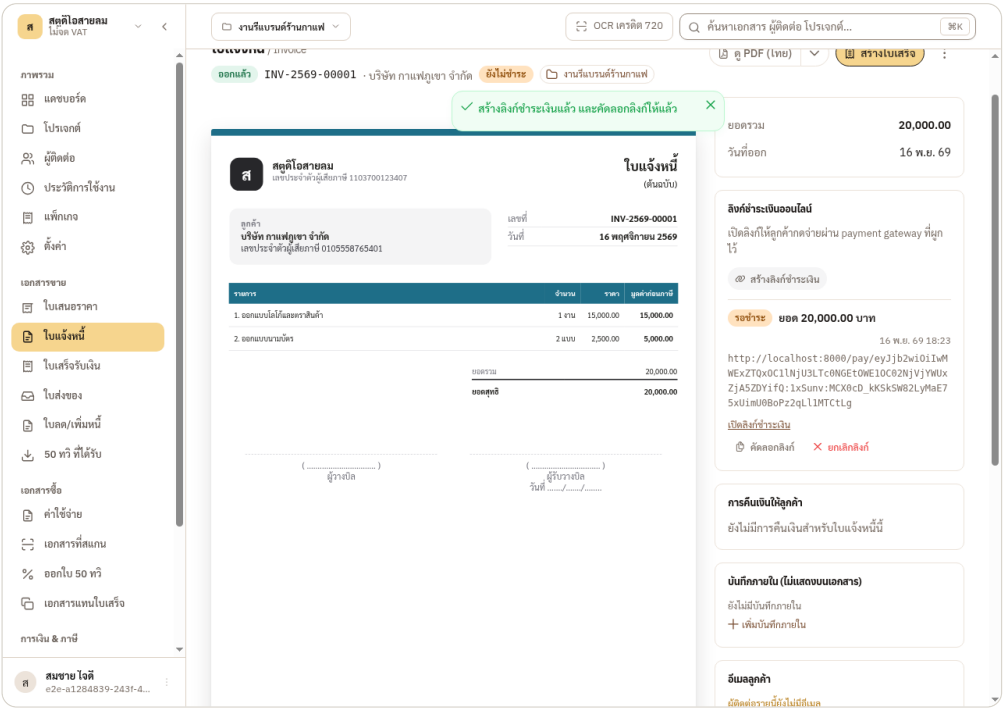


Figure 9-4 A pending link shows the amount, the time it was made, the link itself, and the copy and cancel buttons.

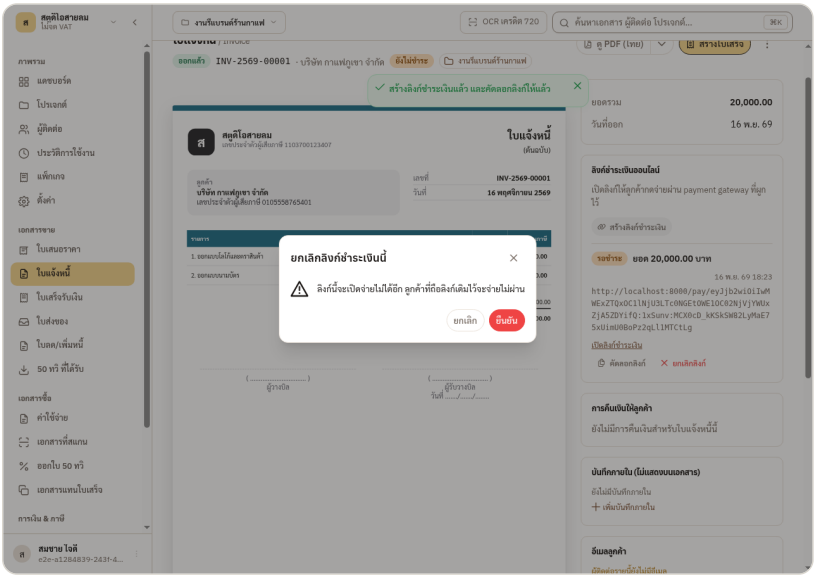
What to know about the link

- An invoice with withholding tax (หัก ณ ที่จ่าย) cannot have a payment link. A gateway page takes one amount only and cannot receive the withholding certificate. If you add withholding tax after the link exists, the link is closed. Collect such an invoice the usual way.
- The amount is what the invoice still owes when you create the link. You cannot type an amount. If the customer already paid part of it another way, the link collects only the rest.

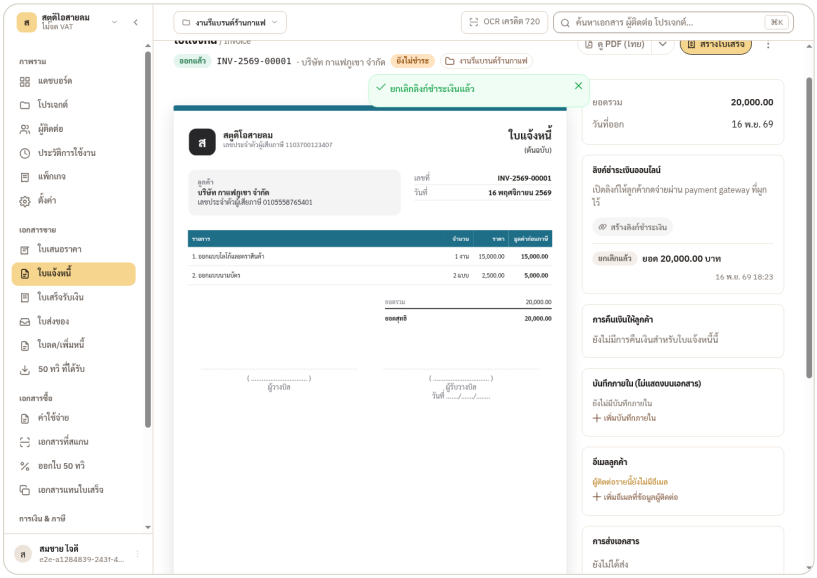
- An invoice has only one open payment page at a time, so the customer cannot pay twice. If you create a link again while the old page is still open for the same amount, EZer keeps the old page. If the amount changed, EZer closes the old page first. If the customer already paid, or the payment is waiting for the bank, EZer refuses a new link.
- The link works for up to 90 days while the invoice is owed. The gateway's own page expires sooner, for example after about a day at Stripe. The card then shows that entry as หมดอายุ (expired), but a link you already sent still opens a new page. To get a new link to copy, press สร้างลิงก์ชำระเงิน again.
- The link closes by itself when the invoice is cancelled, reopened to a draft, edited, fully paid another way, or its connection stops working.
- Anyone with the link can open the payment page without signing in. Send the link to that invoice's customer only.

9.8 Cancel a payment link

1. On the pending link, press ยกเลิกลิงก์ (cancel link) and then confirm. A customer holding the old link can no longer pay with it.

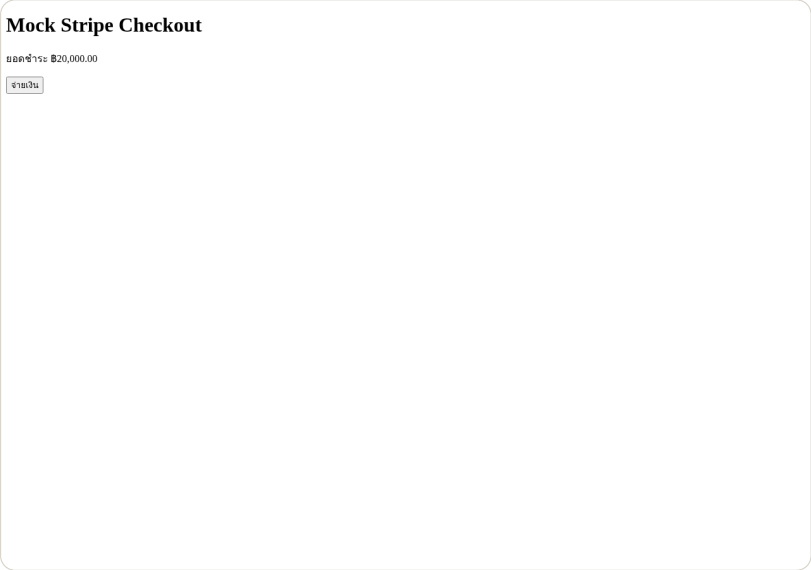


2 The link's status changes to ยกเลิกแล้ว (cancelled). To collect the money again, create a new link.



9.9 The customer pays

1. The customer opens the link and goes to the gateway's payment page, where they choose how to pay and pay. This picture is the simulated page used for testing. The real page is Stripe's, Omise's or KBank's.



2 After paying, the customer sees a thank-you page.



9.10 After payment: the receipt is issued for you

When the gateway reports a payment, EZer asks the gateway for the real status before it does anything. EZer also checks pending links every 5 minutes, so money that arrived still gets a receipt if the gateway's message was lost.

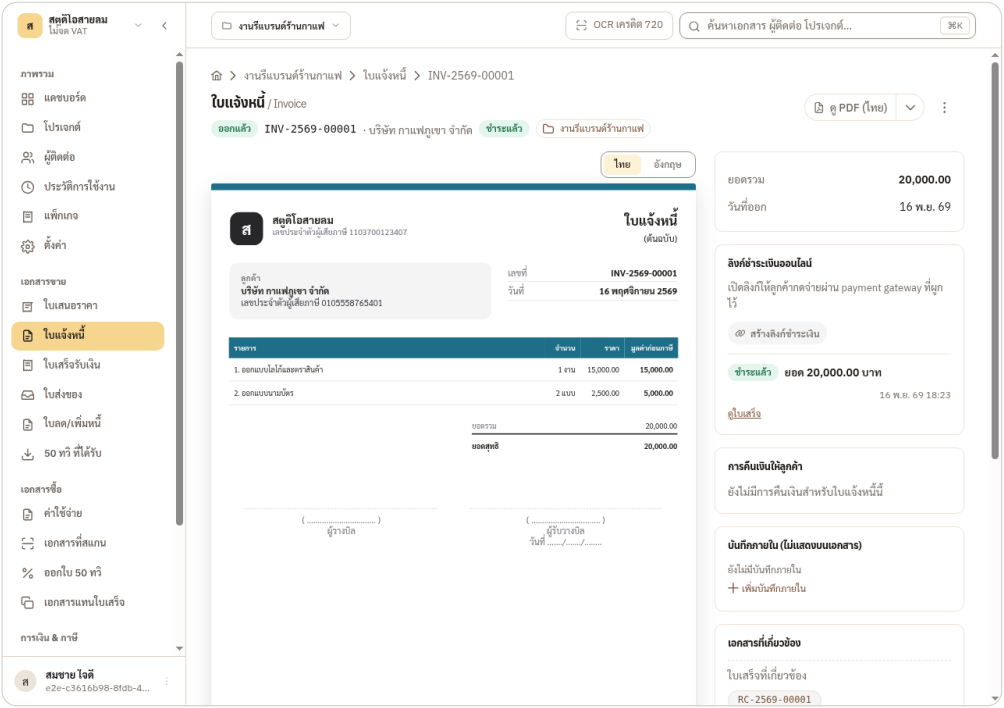


Figure 9-5 The invoice is now ชำระแล้ว (paid). The link shows paid with a ดูใบเสร็จ (view receipt) link, and the receipt is listed under related documents.

EZer issues the receipt by itself when it is safe to. The main checks are these

1. The invoice is still issued: not cancelled and not reopened to a draft.
2. The month the money arrived in is not closed.
3. The money received is no more than the invoice still owes.

4. The receipt's total comes out at exactly the money received.

If one of them fails, or issuing hits another problem, EZer makes a draft receipt instead and writes the reason in the receipt's internal note. The invoice does not show as paid until the receipt is issued. Open that draft receipt, read the reason, fix the cause and issue it yourself.

Payment link statuses

Status	Meaning
รอชำระ (pending)	The link is open and the customer has not paid yet.
ชำระแล้ว (paid)	The customer paid. The receipt may still be on its way, or be a draft waiting for you to issue it.
ล้มเหลว (failed)	The gateway could not make the payment page, or the payment failed. The reason shows under the link.
หมดอายุ (expired)	The gateway's page ran out of time unpaid, or no longer fitted the invoice and was closed. If the invoice is still owed, a link you sent still opens a new page, or you can create a new link.
ยกเลิกแล้ว (cancelled)	Somebody cancelled this link.

> The gateway's fee is not taken off the receipt. The receipt shows the full amount the customer paid. Record the fee as an expense from the tax invoice the gateway sends you.

> EZer does not refund through the gateway yet. To refund a customer, refund in the gateway's dashboard and issue a credit note in EZer.

9.11 For developers: create links through the API

An outside system, such as an online shop or a booking system, calls EZer once with a write API key at POST /api/projects/{project_id}/payment-collections, and gets back both an issued invoice and a payment link. Send your order id as the Idempotency-Key to stop duplicates.

Then poll GET /api/payment-collections/{id} until it is paid and has a receipt. Cancel with POST /api/payment-collections/{id}/cancel. With several connections, you can pass gateway_connection_id. Without it, the default is used.

> The receipt EZer issues automatically is a plain receipt, not a tax invoice.

9.12 Common problems

Problems when you connect a gateway

Problem	Cause and fix
The connection is not saved and the message asks for rk_	You pasted a Stripe sk_ key. Make a restricted key on Stripe's API keys page and paste that instead.
The message says the key does not match the mode	A test key works in test mode only, and a live key in live mode only. Change the mode or the key so they match.
The message says it is a public key (pk_ or pkey_)	You copied the wrong key. Use the Secret Key, not the Public Key.
Omise refuses the webhook secret	Omise's secret must be the base64 string from the Webhooks page of its dashboard. Copy all of it again.
You cannot see the connect button	Your role does not have this access. Ask the Super Admin or a manager to connect it.

Problems when you collect a payment

Problem	Cause and fix
A new link has the status ล้มเหลว (failed)	Read the reason under the link. For Stripe, the usual cause is an rk_ key without the Checkout Sessions: Write permission. The connection still passed, because the key test does not use that permission. Add the permission at Stripe and create a new link.
The link is not created and no link shows on the card	Read the message. Usual causes: the invoice has withholding tax, the amount is below or above what the gateway accepts (see the key table), no verified connection exists, or the customer already paid this invoice.
The customer paid but there is no receipt yet	Without a Signing secret or a registered webhook, the receipt can take up to about 5 minutes. Wait and refresh the page. If it still does not come, check the webhook set-up at the gateway.
The receipt is a draft	One of the four conditions failed, for example the month is closed. Open the receipt, read the reason in its internal note, fix the cause and issue it yourself.
There is no payment link card on the invoice	The card shows on issued invoices only, so issue the invoice first. If you see the card but no create button, your role cannot edit sales documents.

PART B DAILY WORK · CHAPTER 10

Customer deposits

> A customer pays a deposit before the work starts: how to record it so revenue counts once, in the right month.

10.1 The order of documents

A deposit always starts from a deposit invoice. A customer cannot pay a deposit with no invoice. A deposit invoice is an invoice you mark as a deposit, and you can set it while it is a draft.

The order is

1. Issue the deposit invoice.
2. Issue its receipt when the money arrives.
3. When the work is done, issue the real invoice at the full price, with a deduct-deposit line that names the deposit invoice.
4. Issue a receipt for the rest.

Example: a job of 100,000 baht with a 30,000 deposit. A deposit invoice of 30,000 and its receipt of 30,000. Then the real invoice of 100,000 with a deduct-deposit line of 30,000, so 70,000 is due. Then a receipt of 70,000.

Rules for a deduct-deposit line

- The deposit invoice must be in the same project, for the same customer, with an issued receipt. With no receipt it is not a waiting deposit.
- A line deducts no more than what still waits. One real invoice can deduct several deposits, one line per deposit invoice, and one deposit can be deducted in parts over several invoices.

- A real invoice that deducts a deposit cannot be a tax invoice. The tax invoice for the rest sits on the receipt for the rest.

> Two drafts may deduct the same deposit. The first one issued wins, and the second cannot be issued if too little is left. The editor warns when another draft deducts the same deposit.

10.2 When a deposit counts as revenue

A deposit invoice is not revenue. The accrual basis counts revenue at the real invoice, at its full price, in the month it is issued. A deduct-deposit line lowers the amount due and does not lower revenue. The cash basis always counts revenue by receipt, so the deposit receipt counts in the month the money arrives.

The same case: the 30,000 baht deposit arrives in September, and the remaining 70,000 baht in October, when the real invoice is issued.

Figure	September	October
Accrual revenue	0	100,000
Cash-basis revenue	30,000	70,000
Dashboard cash	+30,000	+70,000

> Do not record the deposit as a cash-sale receipt and then invoice the full price: accrual revenue would count twice, as 130,000 baht. Do not issue the full invoice without the deduction either: the amount due reads too high, and cash-basis revenue adds up to 130,000 baht.

10.3 VAT on the deposit

When money arrives before the goods are delivered or the service is done, the VAT liability arises when the money is received. When you choose a tax invoice, the deposit receipt carries the tax invoice for the deposit, and the final tax invoice charges VAT on the rest only.

You choose where the tax invoice goes, with the tax-invoice option, as on any invoice. If the deposit invoice is already an invoice/tax invoice, its receipt cannot also be one. Ask your accountant when unsure.

10.4 A forfeited deposit

The customer cancels and you keep the deposit. There is no special button. Issue the real invoice for the deposit amount, with a deduct-deposit line for what still waits. The amount due is 0 and the deposit becomes revenue.

Example: an invoice of 30,000 baht with a deduction of 30,000 baht. Accrual revenue is 30,000 baht and nothing is due. An invoice whose amount due is 0 reads as settled with no receipt.

10.5 Refunding a deposit

To refund a deposit, cancel the deposit invoice. You cannot cancel it while a real invoice still deducts it. Cancel that real invoice first. Cancelling the invoice does

not cancel its deposit receipt for you. Cancel the deposit receipt too, or the cash basis still counts that money as revenue.

- You cannot cancel once the month is closed and the record is locked. Someone who may unlock must unlock the record first.
- The deposit receipt may carry a tax invoice that the customer already holds, so cancelling it has the same legal caution as cancelling a cash-sale receipt. Ask your accountant when unsure.
- A deducted deposit cannot move to another project. If you filed it in the wrong project, cancel in order: the real invoice first, then the deposit invoice.

10.6 The waiting deposit

A deposit that is received and not yet deducted is a waiting deposit. A deposit invoice with no receipt does not count. Only an issued invoice uses up a deposit. A draft reserves nothing.

Where it shows

- The project report, as a separate line. On the accrual basis it is neither revenue nor profit.
- The customer's page: how much deposit this customer has waiting.

PART B DAILY WORK · CHAPTER 11

Loans and owner capital

> Record a loan, and money the owner puts in or takes out, so the profit stays right: interest is an expense and principal is not.

11.1 The two kinds of account

A loan, and money an owner puts in or takes out, is neither an expense nor revenue. EZer keeps it on a page of its own, Loans and capital. The page holds accounts, and each account has a balance and a list of money in and out.

There are two kinds

- Loan account: one account per loan. Money in is the loan received, money out is principal repaid, and you pick the lender from your contacts.
- Owner account: money in is money the owner puts in, money out is money the owner takes out for personal use. Each owner has one account per project.

An account belongs to one project, as an expense does, so pick a project before you open the page. An account cannot move to another project. If you filed it in the wrong one, record it again in the right one.

> **Caution**
>
> An account cannot move to another project. Pick the right project before you create it.

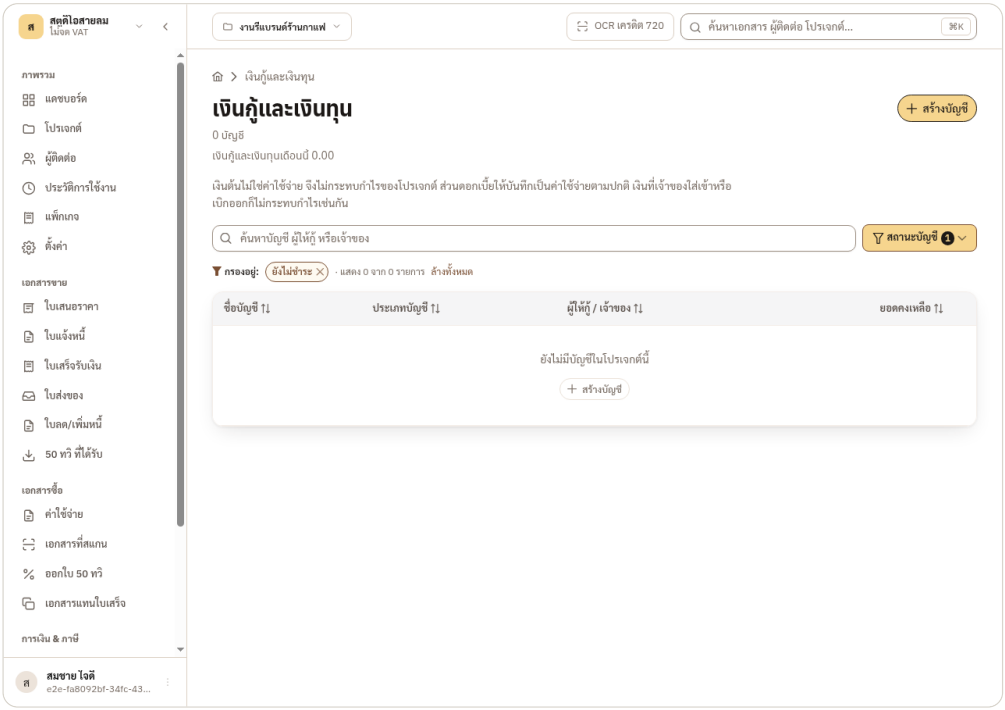


Figure 11-1 The loans page of a project with no account yet

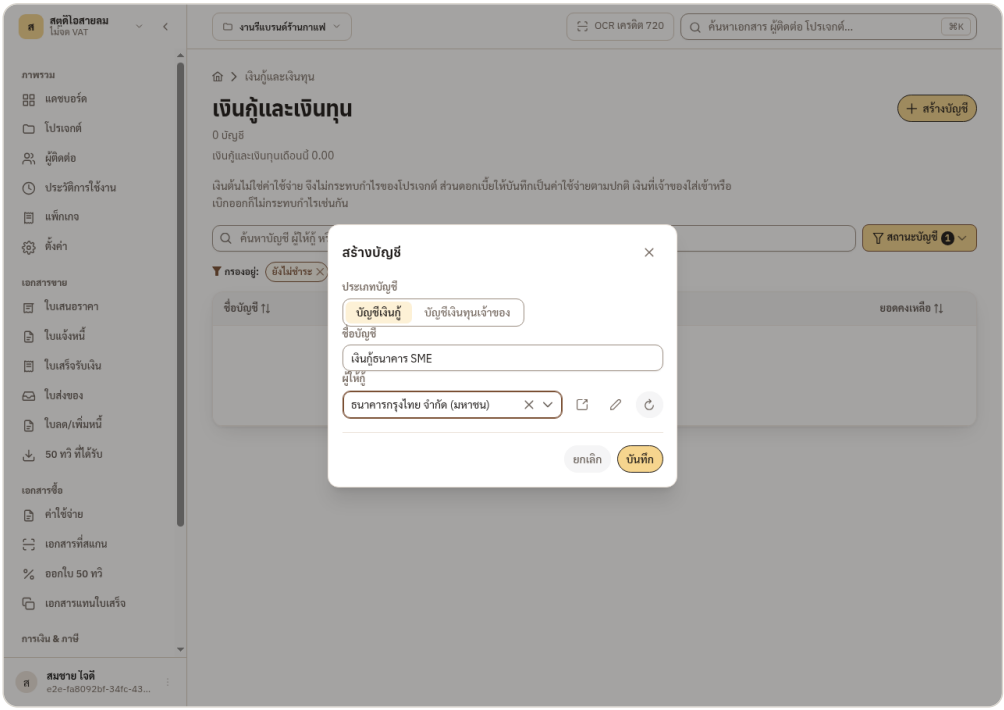


Figure 11-2 Creating a loan account and picking the lender

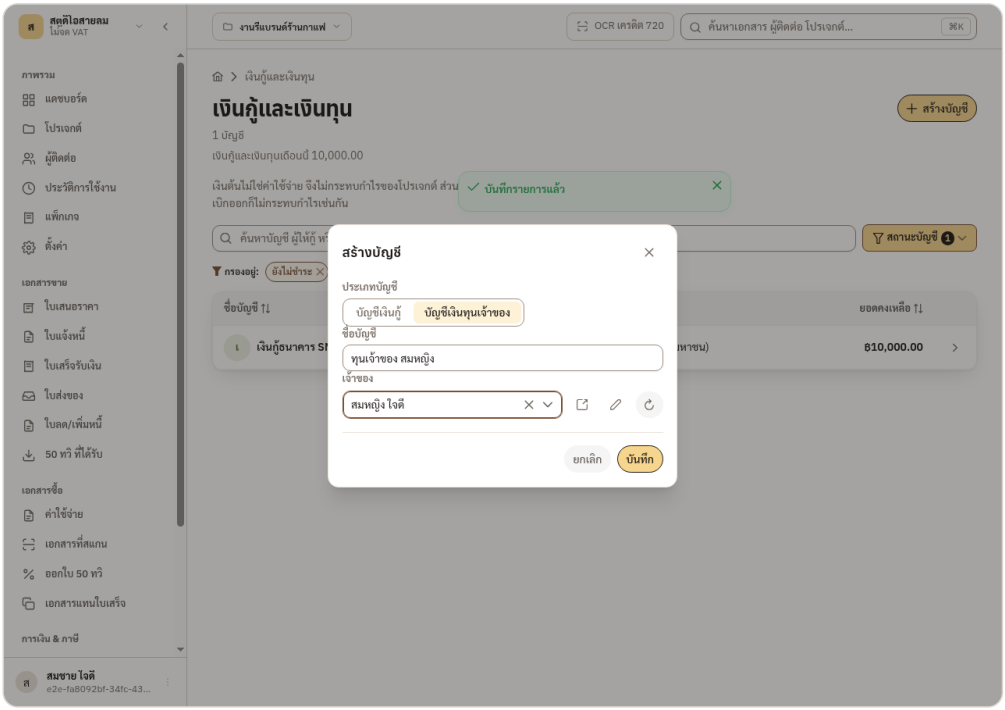


Figure 11-3 Creating an owner account and picking the owner

11.2 Interest is an expense, principal is not

Interest is a cost of the business. Record it as an ordinary expense, under an ordinary expense category. Principal is not a cost. Record it as money out on the loan account.

So one bank debit that holds both is two records. EZer does not split the debit for you. You enter both records by hand.

Example: in one month a project receives 30,000 baht from a customer and pays 10,000 baht of expenses. The bank debits 6,000 baht for the loan: 5,000 of principal and 1,000 of interest.

Record	Recorded as	Profit	Cash
Interest, 1,000	Expense	−1,000	−1,000
Principal, 5,000	Money out on the loan account	No effect	−5,000

The month's profit is 30,000 − 10,000 − 1,000 = 19,000 baht. The month's cash is 30,000 − 10,000 − 1,000 − 5,000 = +14,000 baht. If you also booked the principal as an expense, the profit would read 5,000 baht too low.

A loan received, and money an owner puts in or takes out, also leave the profit alone, on both bases. They reach only the month's cash, and they carry no VAT and no withholding tax.

> ⚠ **Warning**
>
> Do not book principal as an expense. If you do, the profit reads too low by the amount of the principal.

When one loan funds several projects, record one interest expense in each project and type each amount yourself. EZer does not divide the interest.

11.3 The balance, and settled accounts

The balance is all the money in less all the money out. The system works it out each time you open the account. There is no field to type it in. Delete a movement and the balance is worked out again.

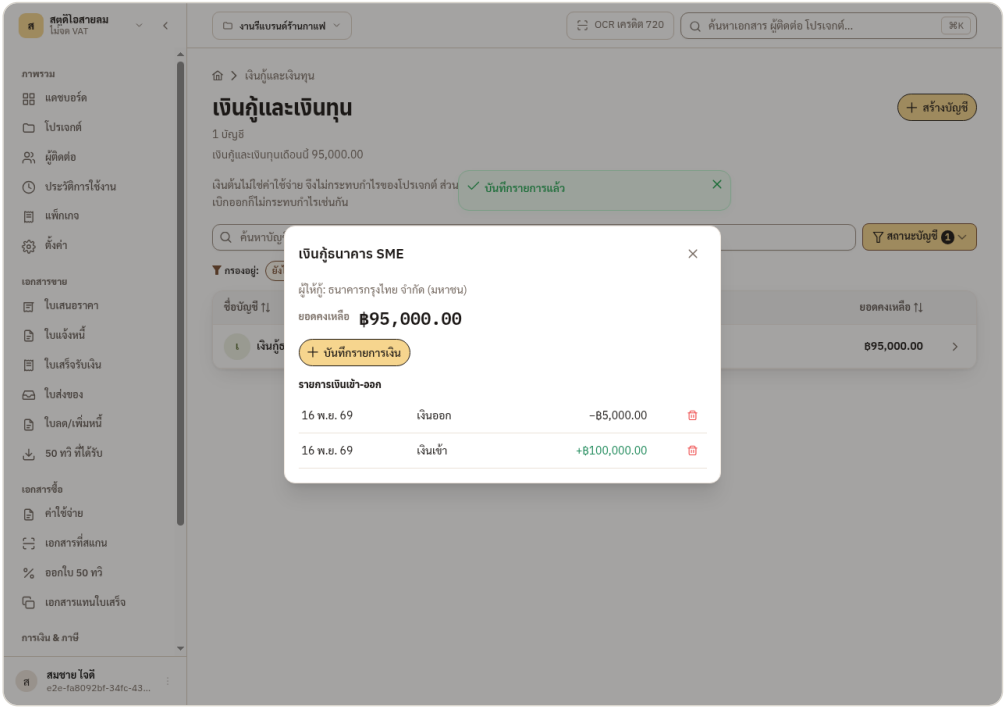


Figure 11-4 The loan balance after a repayment

An account that has movements and a balance of 0 counts as settled, and the list hides it by default. An account with no movement yet is not hidden. Use the Account status filter and pick Settled to see hidden accounts with their full history.

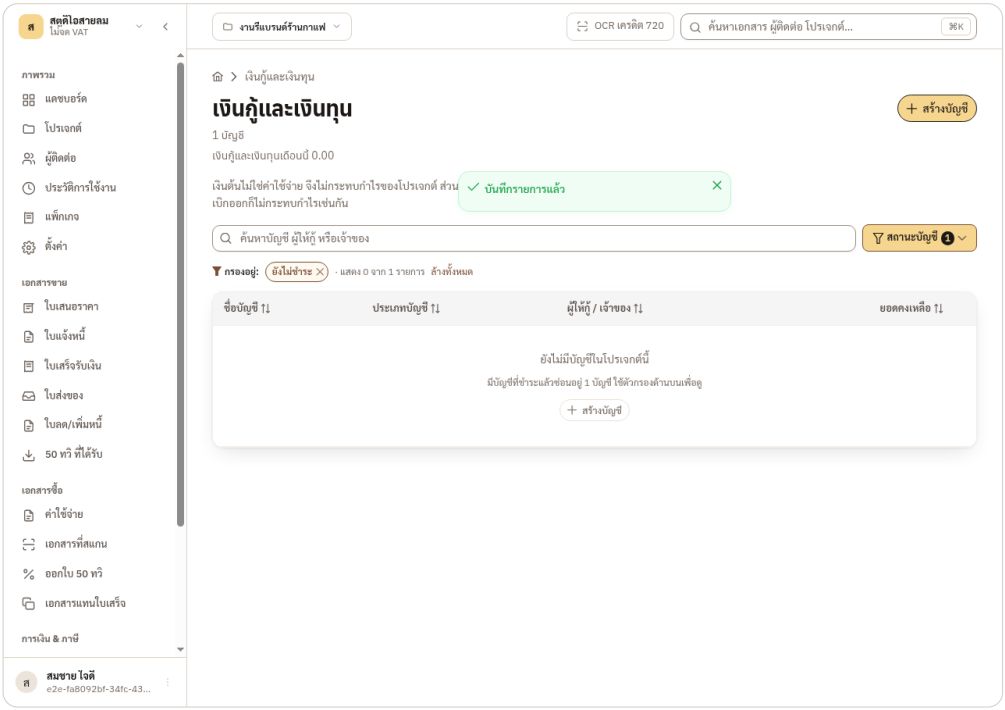


Figure 11-5 A fully repaid account leaves the list

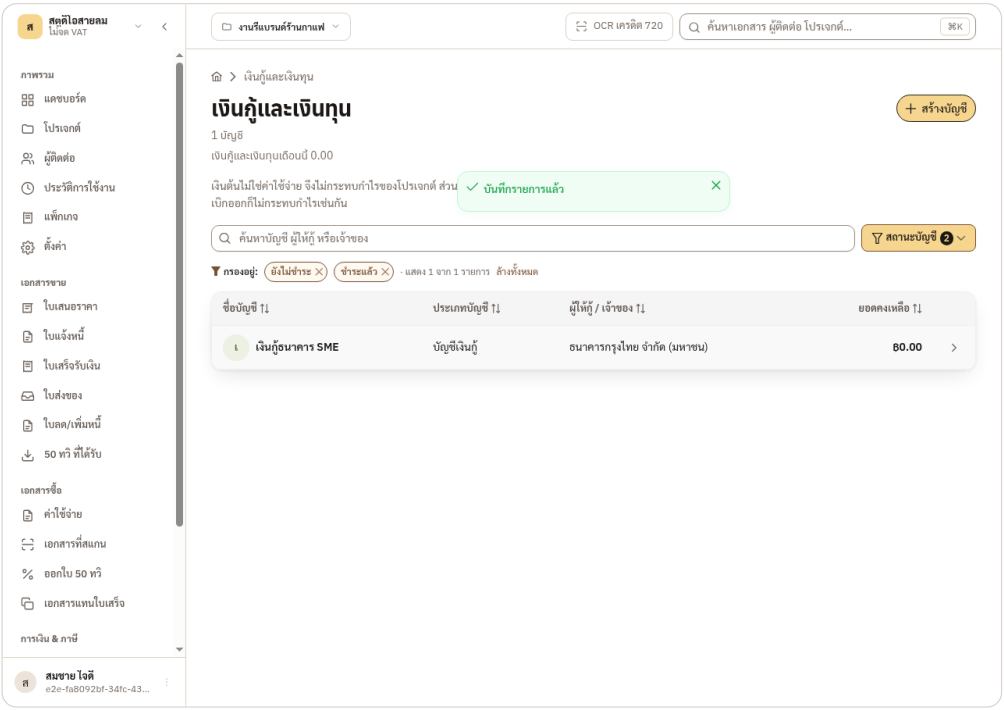


Figure 11-6 The filter shows the settled account again

When a new movement makes the balance not 0, the account shows again with no filter.

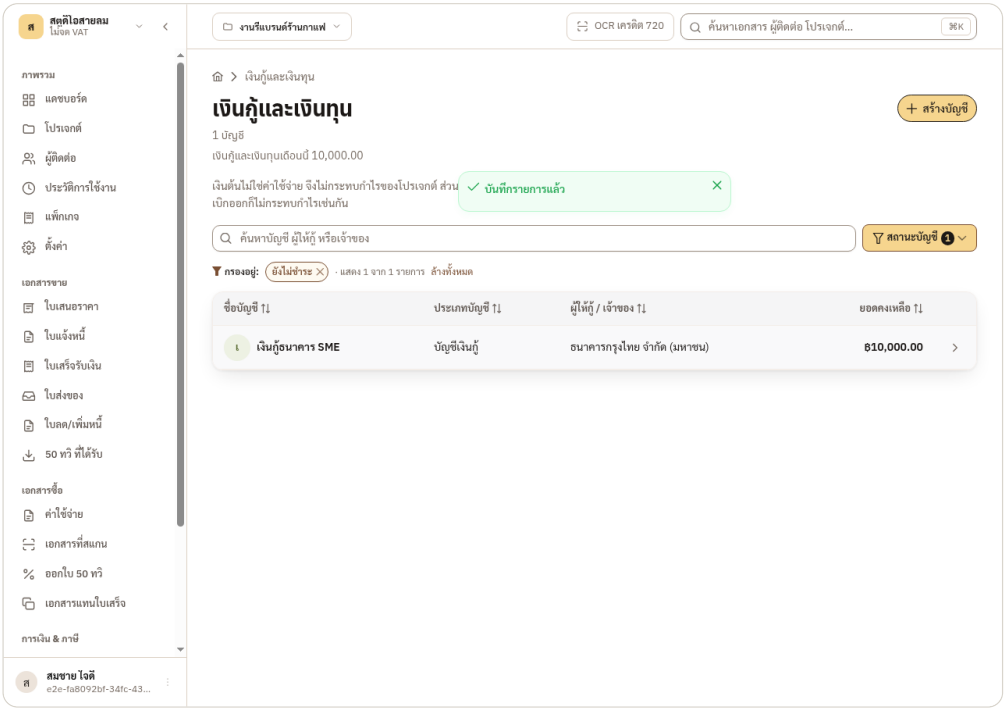


Figure 11-7 The account shows again after a new movement

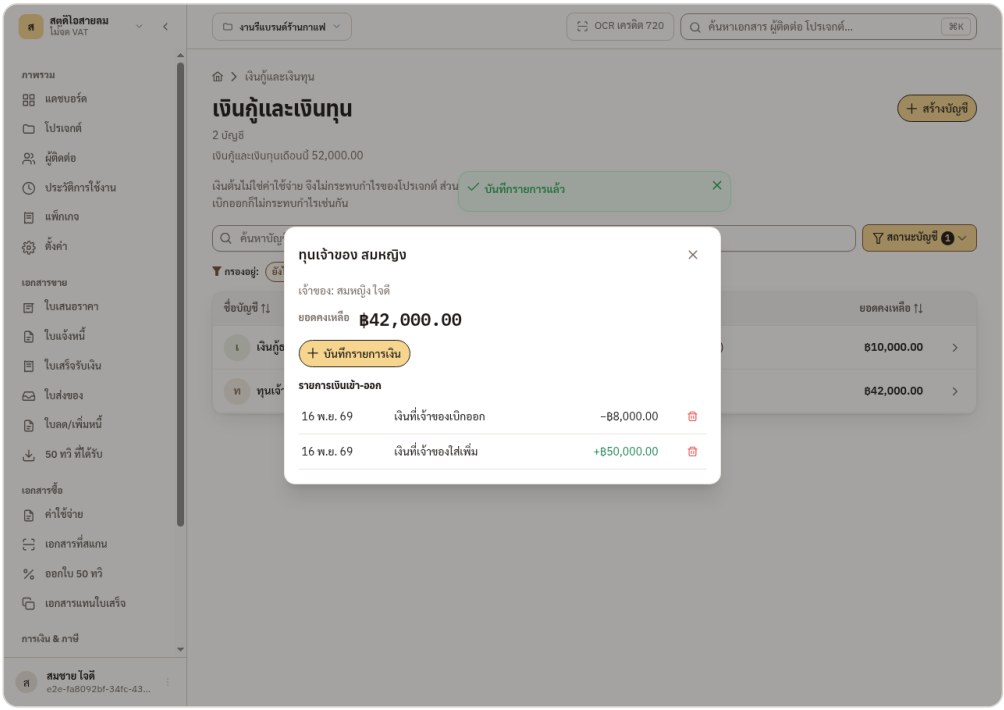


Figure 11-8 An owner account after the owner takes money out

11.4 The month lock, and how to unlock

A movement follows the same month-close rule as an expense. Each movement has a locked mark. When a month closes, the system sets the mark on every movement in it.

A movement is locked when

- the month of its date is closed, and
- it is marked as locked.

A locked movement cannot be deleted, and you cannot add evidence to it. A person who may unlock it unlocks that movement first, and then it can be deleted or given evidence. A movement has no edit button: if you entered it wrong, delete it and record it again. A movement dated into a closed month arrives unlocked, so you can still add one you forgot, and delete it until you lock it.

> ✦ **Tip**
> A movement has no edit button. If you entered it wrong, delete it and record it again.

> The locked mark on a movement sends nothing outside EZer. The interest, being an expense, follows the normal expense path.

The loans and capital figure on the dashboard is explained in the dashboard chapter.

see section 14.5 **The two cash figures on the dashboard**(page 133)

Troubleshooting

Symptom	Cause	Fix
You cannot delete a movement	The movement is locked: its month is closed and the movement itself is marked as locked.	Ask a person who may unlock it to unlock that movement, then delete it again.
You cannot add evidence to a movement	The movement is locked.	Unlock the movement, then add the evidence.
A loan account is missing from the list	The account is settled: it has movements and a balance of 0, so the list hides it.	Use the Account status filter and pick Settled.
You entered a movement wrong	A movement has no edit button.	Delete the movement and record it again.

PART C RESULTS AND HAND-OVER · CHAPTER 12

Close the month and lock your documents

> Invite your accountant, check the document register, lock documents, close the month, and fix things when you must.

12.1 What locking means in EZer

Locking in EZer sends no file to anyone. Your accountant opens the same data in EZer. What you do is tell EZer which documents or which month are ready, and EZer locks them so the figures do not change under your accountant.

EZer is not accounting software and does not file taxes for you. The **ล็อกเอกสารนี้** and **ปิดงวดและล็อกเอกสาร** buttons only mark a record as locked. They send nothing to the Revenue Department and no message to your accountant.

This chapter calls the press on a single document **ล็อก** (the full button is **ล็อกเอกสารนี้**), and the one press for a whole month **ปิดงวด** (the button **ปิดงวดและล็อกเอกสาร**).

12.2 Invite your accountant as an auditor

Invite your accountant with the role **ผู้สอบบัญชี** (auditor). This role sees only issued documents, never drafts. It needs no package. It can press **ล็อกเอกสารนี้** and **ปลดล็อก**, but it cannot edit documents or close a month.

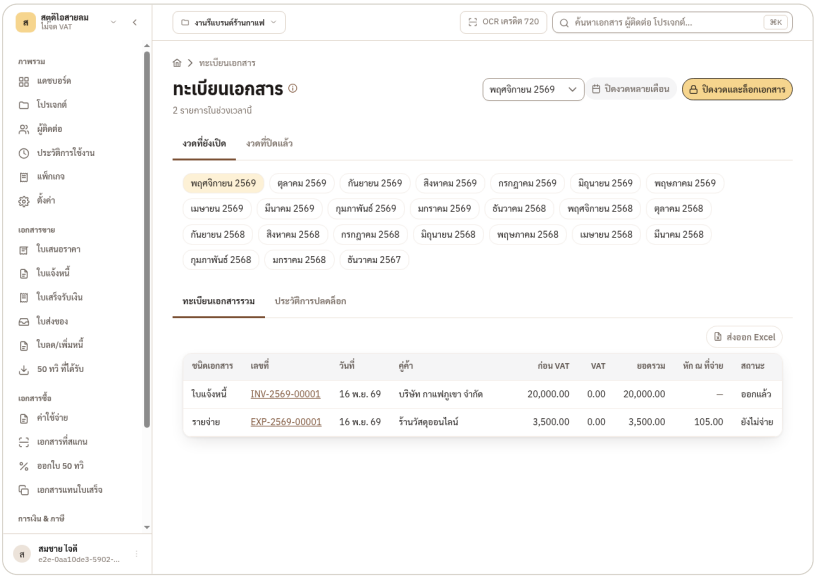
How to invite and pick a role is in the chapter on splitting a job with your team. The read-only viewer role can also look at the data, but it sees drafts and cannot lock or unlock.

Splitting a job with your team(page 134)

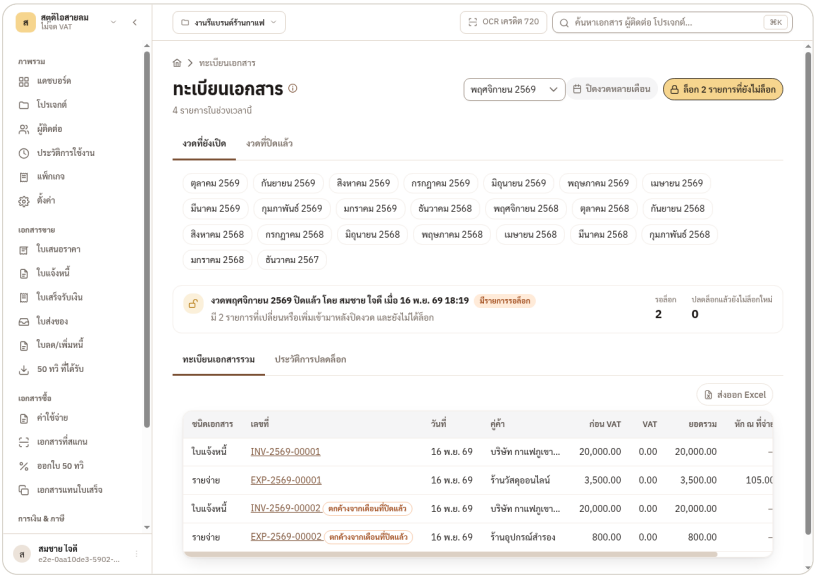
12.3 Check the document register before closing

The document register (ทะเบียนเอกสาร) puts sales documents and expenses in one table. Look at it before you close the month for anything left over or odd.

1 Open the **ทะเบียนเอกสาร** page and look at the **ทะเบียนเอกสารรวม** tab.



2 Look for the **ตกค้างจากเดือนที่ปิดแล้ว** badge. It marks a document dated in an already closed month that has not been locked.



12.4 Lock one document at a time

To lock some documents before the month ends, open the document and press **ล็อกเอกสารนี้**. EZer asks you to confirm and locks that document at once. The main administrator, the manager and the auditor can press it. A quotation and a delivery note have no such button, though the month close still locks them.

> **Caution**
>
> A locked document stays locked in every month, not only in a closed one. The button sends nothing to the customer. To send a document to a customer, send the PDF or an email from the document page (see the chapter on issuing your first sales document).

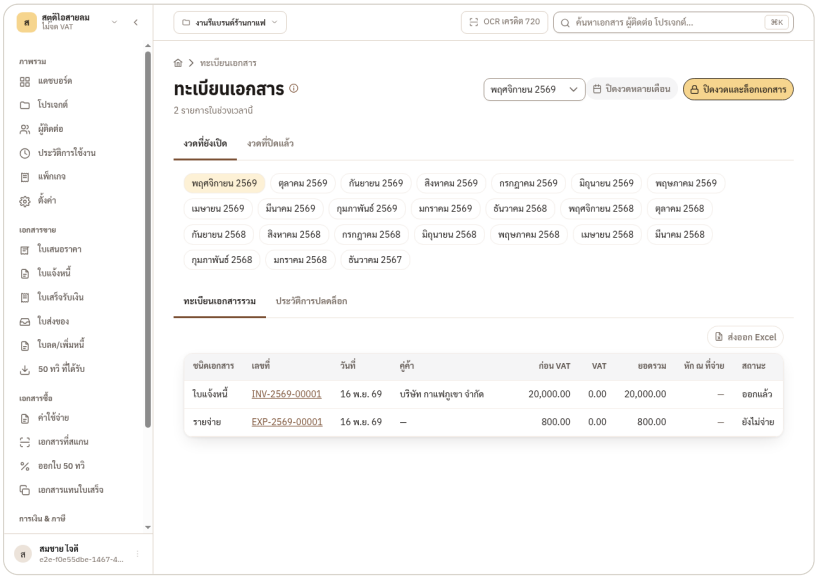
Issue your first sales document(page 30)

12.5 Close the month

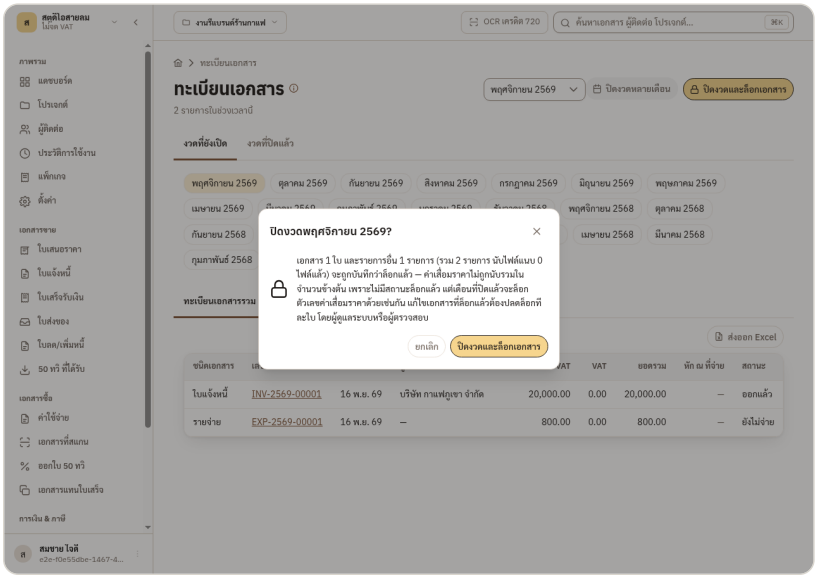
Closing the month locks the whole month's documents in one go. EZer locks every record of that month, in every project, at once. The main administrator (ผู้ดูแลหลัก) and the manager can close. If the month holds records in a project you may not see, EZer refuses. Someone who can see every project must close it.

1. On the **ทะเบียนเอกสาร** page, pick the month to close and press **ปิดงวดและล็อกเอกสาร**.

   → **You should see** To close several months together, use the **ปิดงวดหลายเดือน** button.

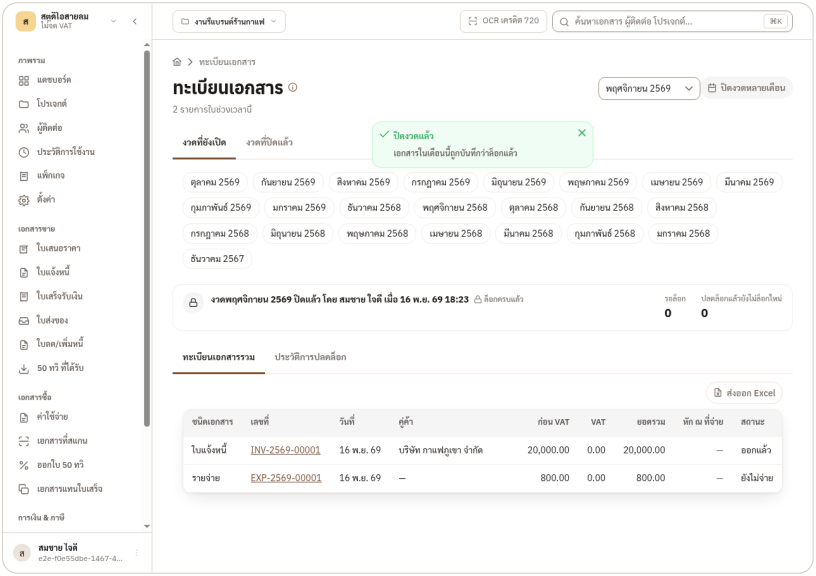


2 Read the confirmation. It counts the documents, other records and attached files that will be locked. If it is right, press **ปิดงวดและล็อกเอกสาร**.



3 The register shows a banner saying the month is closed, by whom and when.

> → **You should see** After the close, the button becomes **ล็อก N รายการที่ยังไม่ล็อก**. It locks only the records not yet locked and leaves the locked ones alone.

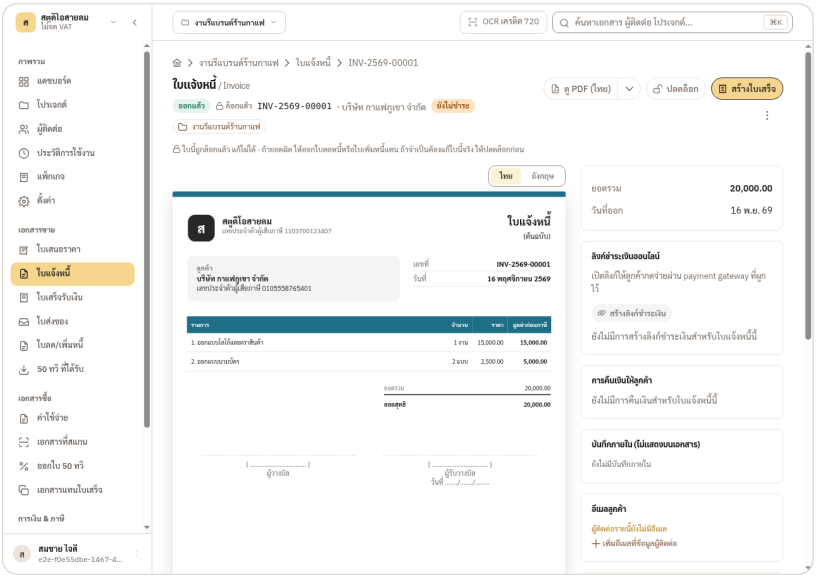


The close covers every kind of sales document, expenses, withholding-tax certificates issued and received, payment vouchers, receipt substitutes, uploaded files and other records. Depreciation is not counted among the locked records, but a closed month freezes its figures.

> **Caution**
>
> There is no "reopen the month" button. A closed month stays closed. If you must change something, unlock the document one by one. See the unlock section below.

12.6 A locked document

1. Open a locked invoice. The **แก้ไข** button is gone, and a message says the document is locked, with an **ปลดล็อก** button for people who may use it.



A locked document

- cannot be edited at all. EZer refuses the edit on the server, not merely by hiding the button.
- If an amount is wrong, issue a credit note or a debit note instead of editing the original.
- People who may not unlock see no **ปลดล็อก** button and must ask the manager or the auditor. The app's message calls them the administrator or the inspector (ผู้ดูแลระบบหรือผู้ตรวจสอบ).

> ⚠ **Warning**
>
> A credit note issued after the customer has withheld tax does not correct the customer's withholding-tax certificate. Ask your accountant first.

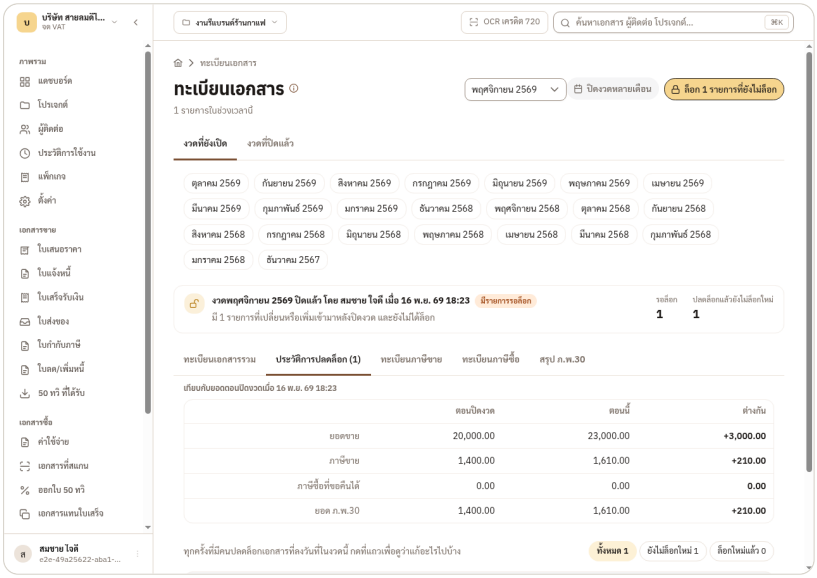
12.7 Unlock and lock again

If you really must change a locked document, the main administrator, the manager or the auditor can press **ปลดล็อก** on it. It stays editable until it is locked again. Every unlock is recorded with who and when.

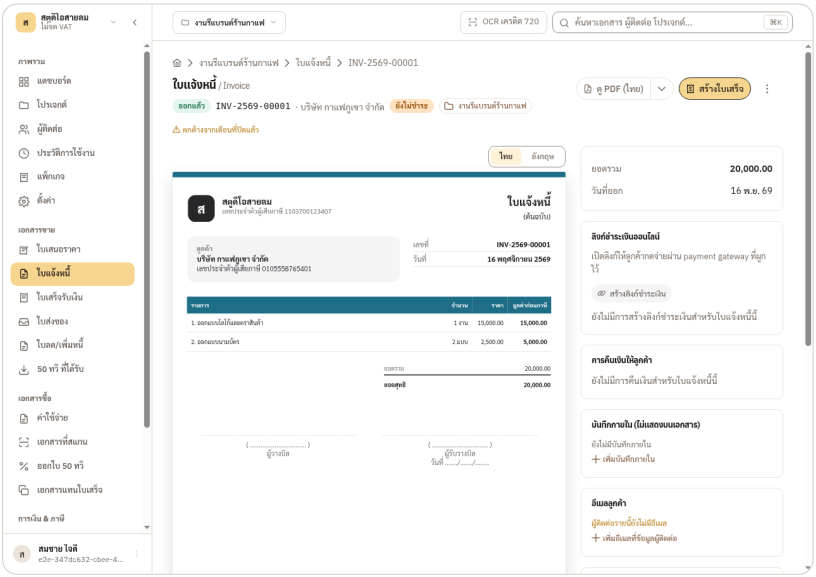
When you finish, there are three ways to lock it again: press **ล็อกเอกสารนี้** on the document, press **ล็อกกลับโดยไม่แก้** in the unlock history, or press **ล็อก … รายการ**

ที่ยังไม่ล็อก on the register to lock everything left (this whole-month button is only for people who may close a month).

1. On the **ประวัติการปลดล็อก** tab, click the document's row. A table compares the figures at the close with the figures after the edit, so you and your accountant see what changed.



1. A document changed or added after the close shows the **ตกค้างจากเดือนที่ปิดแล้ว** badge in lists, and its page says the same.



A document dated back into a closed month saves normally but is not locked until you lock it. The form shows a notice before you save. A tax invoice dated back moves the month in which output VAT falls due, so ask your accountant first.

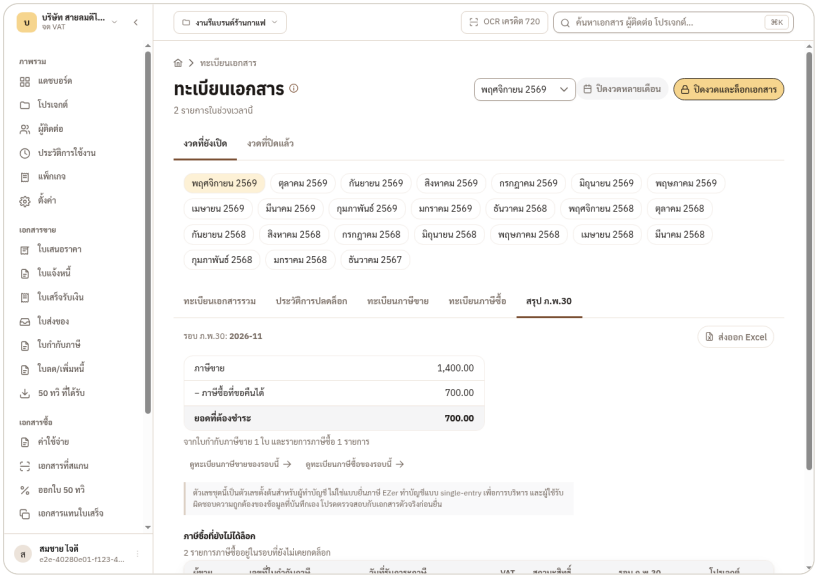
12.8 Files your accountant can use

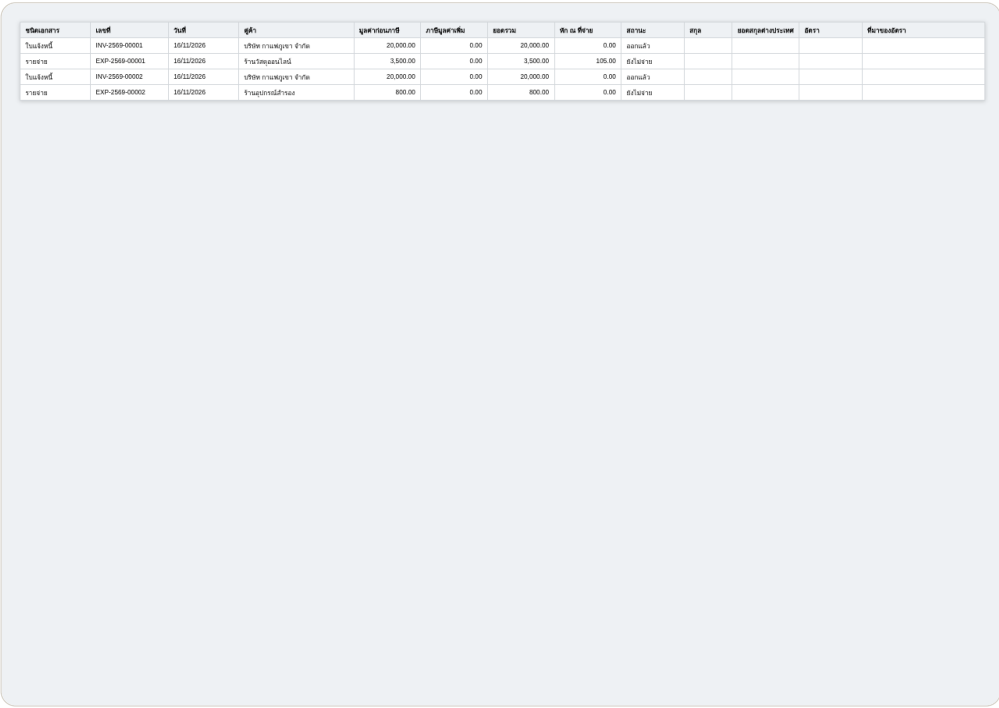
EZer exports Excel files with the **ส่งออก Excel** button: the document register, the output VAT register, the input VAT register and the ภ.พ.30 summary, plus

the profit and loss report and the list for each document kind. EZer produces no file for filing taxes.

1. Open the **สรุป ภ.พ.30** tab to see the month's output VAT netted against input VAT.

   → **You should see** These figures are a starting point for the bookkeeper, not a tax return. Check them against the original documents before filing.





ชนิดเอกสาร	เลขที่	วันที่	คู่ค้า	มูลค่าก่อนภาษี	ภาษีมูลค่าเพิ่ม	ยอดรวม	หัก ณ ที่จ่าย	สถานะ	สกุล	ยอดสกุลต่างประเทศ	อัตรา	ที่มาของอัตรา
ใบแจ้งหนี้	INV-2569-00001	16/11/2026	บริษัท กานพฤกษา จำกัด	20,000.00	0.00	20,000.00	0.00	ออกแล้ว				
รายจ่าย	EXP-2569-00001	16/11/2026	ร้านวัสดุออนไลน์	3,500.00	0.00	3,500.00	105.00	ยังไม่จ่าย				
ใบแจ้งหนี้	INV-2569-00002	16/11/2026	บริษัท กานพฤกษา จำกัด	20,000.00	0.00	20,000.00	0.00	ออกแล้ว				
รายจ่าย	EXP-2569-00002	16/11/2026	ร้านอุปกรณ์สำนักงาน	800.00	0.00	800.00	0.00	ยังไม่จ่าย				

Figure 12-1 The register's Excel file, ready to pass to your accountant.

PART C RESULTS AND HAND-OVER · CHAPTER 13

Project stages

> The five project stages, what each means, and which documents move a project along.

13.1 The stages

You never set the stage by hand. The system reads it from the issued sales documents in the project and the amount the client still owes.

Stage	When
New	No sales document has been issued yet.
Quoted	A quotation is issued, awaiting the client.
Billed	An invoice or tax invoice is issued, with no receipt yet.
Awaiting payment	There is a receipt, but the client still owes money.
Done	There is a receipt, and nothing is owed.

> A project that is still owed money never reads Done, even when another invoice on it is negative.

PART C RESULTS AND HAND-OVER · CHAPTER 14

Reading the dashboard figures

> What each dashboard figure counts, what it leaves out, and which list figure it matches.

14.1 Outstanding

Everything customers still owe, across every issued invoice of the selected projects.

Each invoice counts as

- the invoice's total
- plus the issued debit notes against it
- less the issued credit notes
- less what its issued receipts collected

What does not count

- A draft or cancelled note. The invoice's own total is never rewritten.
- An invoice that collected more than it billed counts as zero, so one customer's overpayment never reduces another customer's debt.
- A cancelled invoice, and its receipts.

It is the same figure as the Amount due column of the invoice list, over the same projects, summed over issued invoices that are unpaid or partly paid.

> The overdue figure is part of this amount, not a figure to add to it.

14.2 Overdue

The part of the outstanding amount that is late: every issued invoice whose due date has passed, as of today in Thai time.

Which invoices are late

- An invoice due today is not overdue yet.
- An invoice that states no credit term has no due date, so it is never overdue.
- A late invoice that has been partly paid counts its whole remaining balance, because the age counts from the due date and never restarts at the last payment.

It is the same figure as the Amount due column of the invoice list over the same projects, filtered to Overdue.

> The dashboard counts active projects only, while the invoice list still lists a deactivated project's invoices. So the two can differ when a project has been closed.

14.3 Expenses in the selected period

The "less expenses" figure under the net profit counts lines of the selected projects. How it counts depends on the basis chosen beside the period.

- Cash basis: lines paid within the selected period. An unpaid expense does not count.
- Accrual basis: lines by the date they were incurred within the selected period, paid or not.

> A line recorded as an asset counts differently on each basis. The cash basis counts it in full in the period it is paid, and has no depreciation. The accrual basis leaves it out of this figure, because its cost is written off as depreciation over its useful life and taken off net profit.

The "View by payment channel" link under the revenue and expense line opens the expense list for the same period, with a summary of how much each account or card paid. That figure counts differently from the dashboard's expense figure, because it adds VAT back and takes withholding tax off. See "Paid by channel" in the expense-list chapter.

14.4 Net profit for the selected period

Net profit = this period's revenue minus this period's expenses, plus other income/adjustments (if any) of the selected projects.

What counts as other income/adjustments

- A line booked under the รายได้อื่นๆ category — for example, a refund from a supplier. Use the "Record other income" button on the expense list.
- A receipt's payment adjustments, both what is deducted (a transfer fee) and what is added (a rounding gain).

- Cash basis: an expense-booked line counts at its paid date, the same as the expense figure. A receipt's adjustment counts at the receipt's issue date.
- Accrual basis: an expense-booked line counts by the date it was incurred. A receipt's adjustment counts at the receipt's issue date too. Depreciation, and the remaining value of a retired asset, are taken off as well. The dashboard does not show depreciation as a figure of its own.

The bar under the net profit shows what the profit is made of. With a profit, it splits the revenue into what was taken off (the expenses, and on the accrual basis depreciation too) and what is left as profit. With a loss, it splits the costs into what revenue covered and what it did not.

> The dashboard shows this line under the profit figure only when it is not zero. It is already counted inside the net profit above, not a separate figure.

14.5 Two cash figures: profit, and loans and capital

On the cash basis, when the net of loans and owner capital in the selected period is not 0 (and you may see finance figures), one more line under the net profit shows the two figures below. The accrual basis does not show it, because it has no cash to split.

- Loans and capital: the sum of the money in less the money out of the loan and owner accounts in the selected period. This figure reaches no profit figure.
- Profit plus loans and capital: the cash-basis net profit plus the figure above.

> Profit plus loans and capital is not the whole change in cash. Cash-basis profit counts amounts before VAT and receipts before withholding tax, so it does not match the money that really moved.

Loans and owner capital(page 105)

PART D TEAM AND PACKAGES · CHAPTER 15

Splitting a job with your team

> You take a job from a client and pay part of it to teammates who help you deliver it. This chapter says how to record the income and the payouts so the profit figure stays correct.

15.1 The situation this chapter covers

You take a job directly from a client, then pay part of the fee to teammates — a designer or a developer — who help you deliver it. This is a common shape of work for a Thai freelancer.

The simplest-looking approach is to record only your own share of the income, because the rest "is not yours" — or to shrink the invoice down to your share alone. This is wrong, and it makes the project profit figure, the core number Ezer reports, unreliable with no warning anywhere.

When you record only your own share, the income figure stops matching the 50 ทวิ the client issues in your name for the full amount, and the real payments to your team disappear from the system — leaving no evidence for an actual-expense tax deduction later. This is a quiet problem: you find out only when the documents and the figures disagree, often the following year.

The correct way uses what Ezer already has — no new document, no new mechanism. Record the full contract amount as sales income, and record each payment to a teammate as a separate expense. Project profit then comes out correct on its own: full income minus expenses, teammate payouts included.

15.2 One 50 ทวิ in your name, for the full amount — record the full income

This does not need you to declare your intent — it follows from the document the client actually gives you, which Ezer already keeps. When the client issues one 50 ทวิ in your name alone, for the full contract amount, the whole amount is your income as a matter of law.

In that case, issue the project invoice and receipt for the full contract amount — not for the amount left after you set aside your team's share.

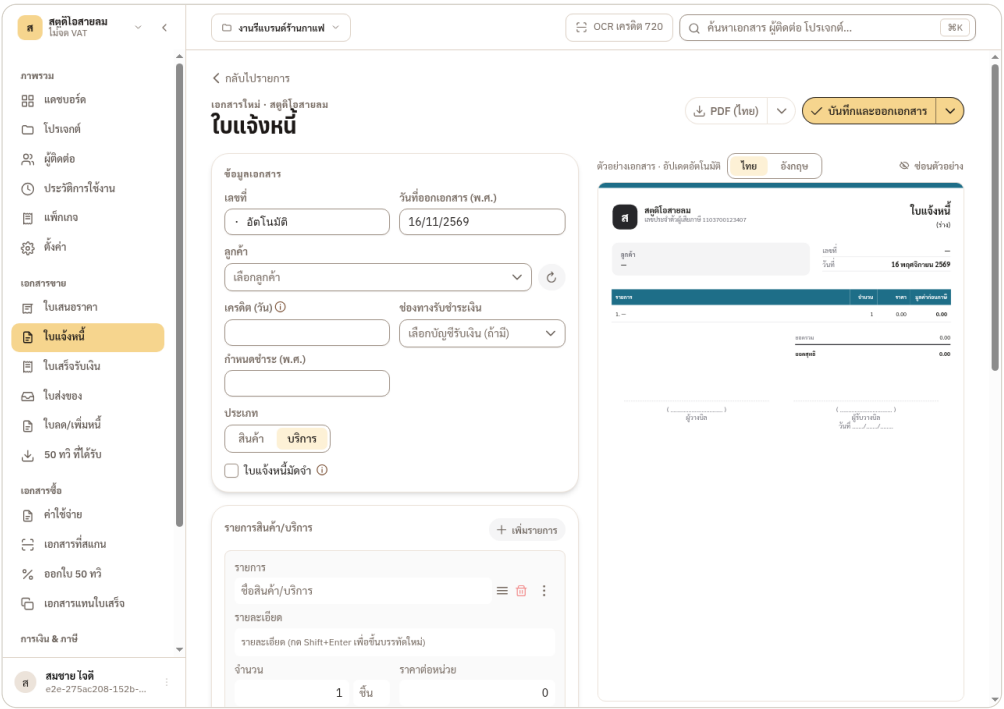


Figure 15-1 A new invoice with its project already attached — fill in the full contract amount here, not your share of it.

Then record each payment you make to a teammate as an expense of the same project, one line per person.

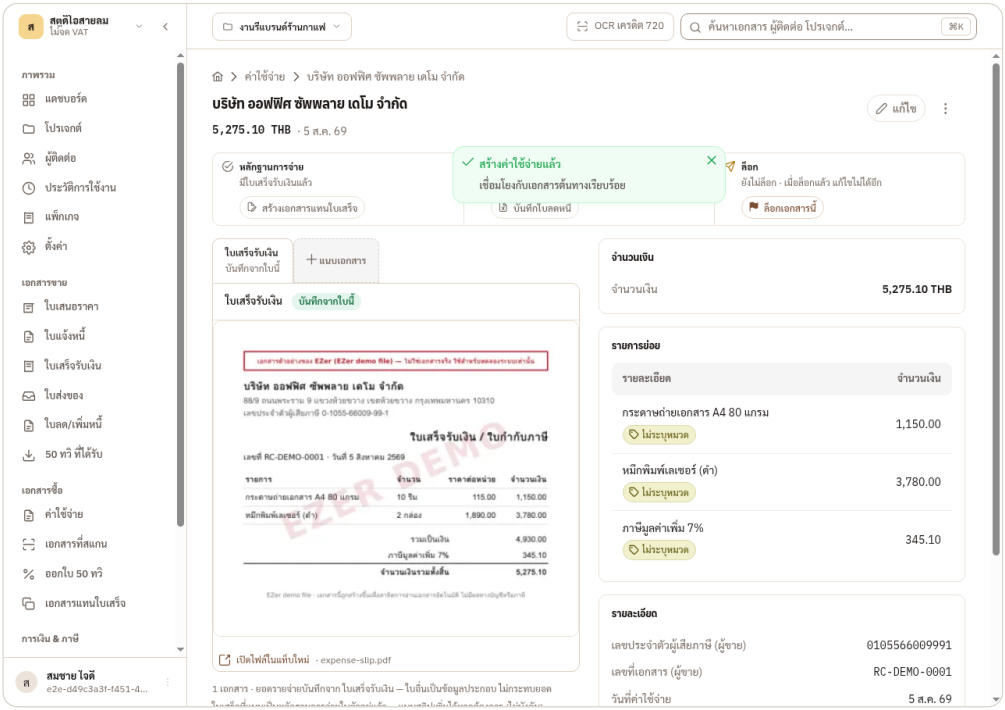


Figure 15-2 A payment to a teammate, recorded as an ordinary expense with the payment evidence attached.

15.3 A teammate who is an individual — you withhold tax on the payment

When the person you pay is a natural person, the payment falls under section 50 of the Revenue Code, which makes the payer responsible for withholding tax

before paying. As the one engaging the teammate, this duty is yours — not optional.

Ezer can issue the 50 ทวิ for a teammate straight from the same expense you used to record the payment — there is no separate place for this.

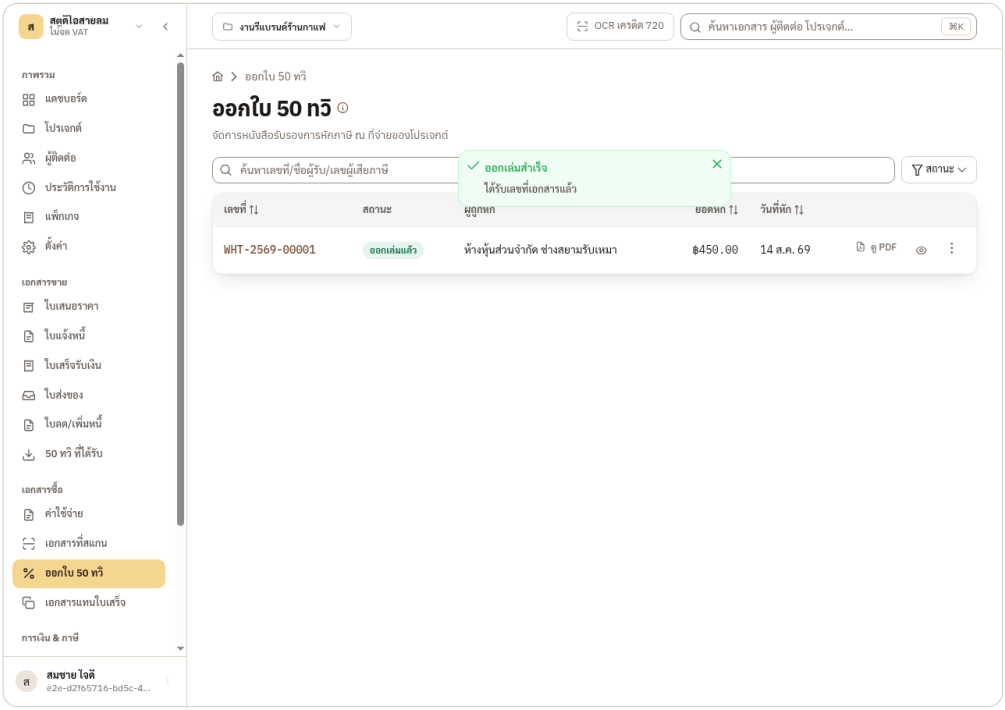


Figure 15-3 The withholding-tax certificate, issued from the expense that recorded the payment to a teammate.

> The certificate you issue to a teammate is a different document from the 50 ทวิ the client issues to you. Each records a different thing: the client's certificate shows how much tax was withheld from your income, and the one you issue shows how much you withheld from the payment to your teammate.

15.4 When the client issues a separate 50 ทวิ per person

Some clients issue a separate 50 ทวิ directly to each person on the team, instead of one certificate in your name for the full amount. In that case, each person's income is the amount stated on their own 50 ทวิ.

You record only the portion issued in your own name as project income. The portion issued in a teammate's name is neither your income nor your expense from the start, because that money never passed through your hands as an accounting matter.

15.5 Summary

Pick how to record based on the 50 ทวิ you actually received

1. One 50 ทวิ in your name, for the full amount — record the full amount as sales income, and record each payment to a teammate as a separate expense.
2. A teammate who is an individual — withhold tax under section 50 and issue them a 50 ทวิ from the same expense.
3. A separate 50 ทวิ for each person — record only the portion in your own name as income; a teammate's portion is not yours to record.

PART D TEAM AND PACKAGES · CHAPTER 16

Roles and permissions

> Invite your team to EZer, pick the right role for each person, set a role per project, and hand over the main administrator role.

16.1 How roles work

Each member of a provider has one role. The role says what the person can see and change. The role you set first is the base role, and it applies to every project of that provider. To give one person different rights on some projects, set a role per project on top of it.

A provider has exactly one main administrator (ผู้ดูแลหลัก). The person who creates the provider starts as that administrator.

16.2 The eight roles

The roles run from most rights to fewest. The names below match the screen.

- **ผู้จัดการ** (manager): full rights. Manages sales and purchase documents and finance, deletes documents, invites and manages members, creates projects, closes periods, and locks and unlocks documents.
- **ธุรการเอกสาร** (document clerk): full control of sales and purchase documents, but no finance or profit data.
- **ฝ่ายขาย** (sales): views and edits sales documents. No purchase documents, no finance data.
- **ฝ่ายจัดซื้อ/บัญชี** (purchasing/accounts): views and edits purchase documents and can reach finance data. No sales documents.

- **ผู้ดูอย่างเดียว** (viewer): sees every area, changes nothing.
- **ผู้สอบบัญชี** (auditor): sees issued sales and purchase documents only, no drafts, and can view finance data. An auditor can also lock documents and unlock them. It suits an accountant or an outside reviewer.
- **ลูกค้า** (customer): sees issued sales documents only, such as invoices. Nothing else of the business.
- **ไม่มีสิทธิ์** (no access): sees nothing of this provider yet. You can still open some projects to the person later.

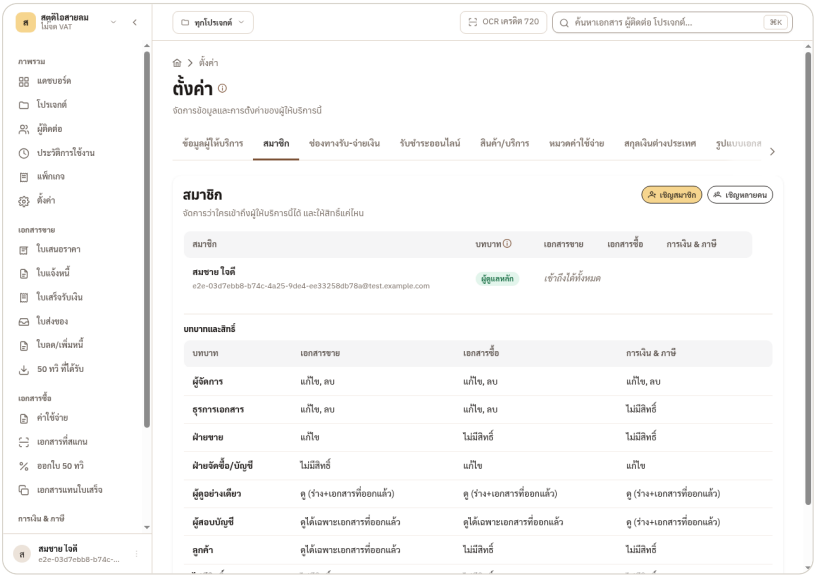
> ✦ **Tip**
>
> Manager, document clerk, sales and purchasing/accounts need a live package to work on documents. Viewer, auditor and customer need none. There are no seats and no limit on the number of members.

Packages and billing(page 154)

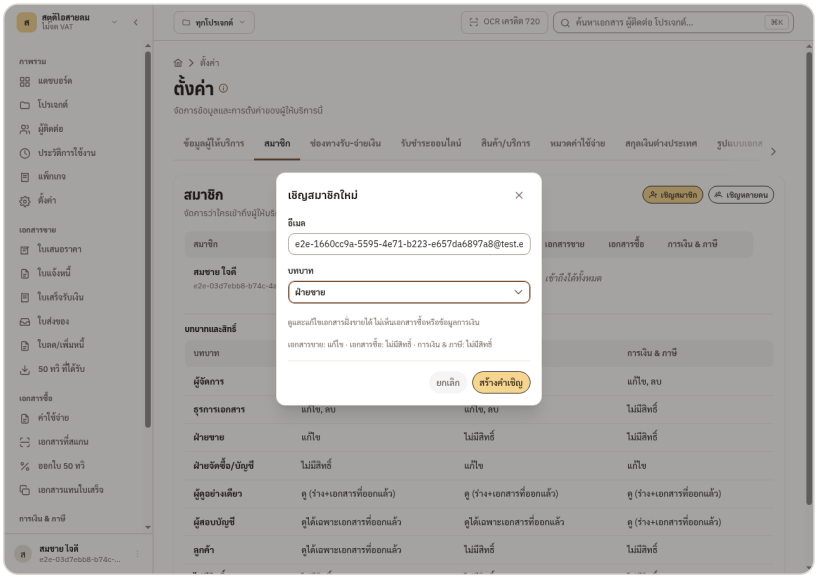
16.3 Invite a member

The main administrator and managers can invite members. Open **ตั้งค่า** and go to the members tab.

1. Press **เชิญสมาชิก**.

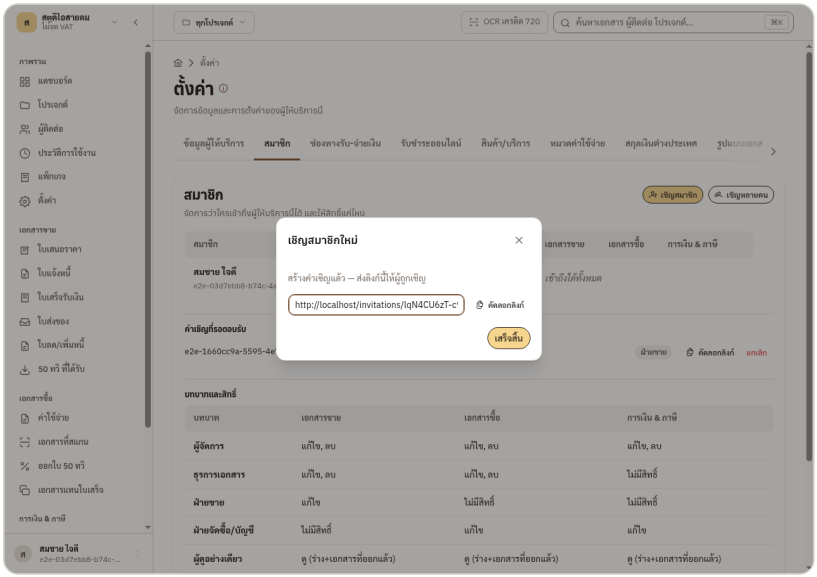


2 Fill the **อีเมล** and choose the **บทบาท**. The choice starts at ไม่มีสิทธิ์, so pick a role yourself. The screen sums up the level of sales, purchase and finance access that role gives.

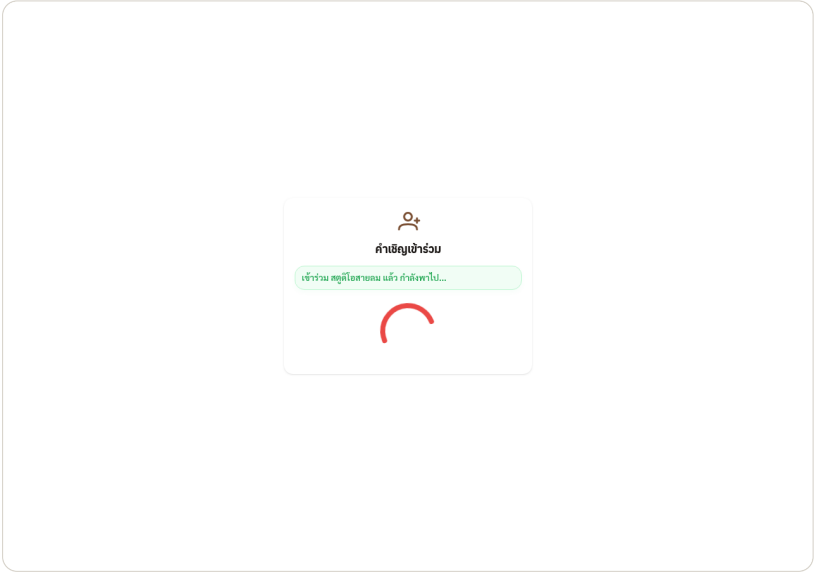


3 Press **สร้างคำเชิญ**.

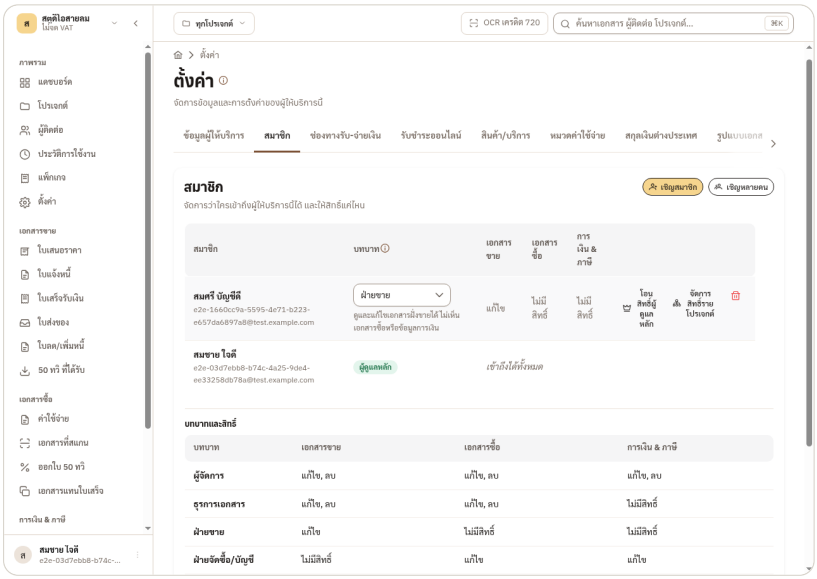
> → **You should see** EZer emails the invitation and also shows a link you can copy and send yourself. The invitation is valid for 14 days.



4 The invitee opens the link, presses **รับคำเชิญ**, and sees a message that they have joined.



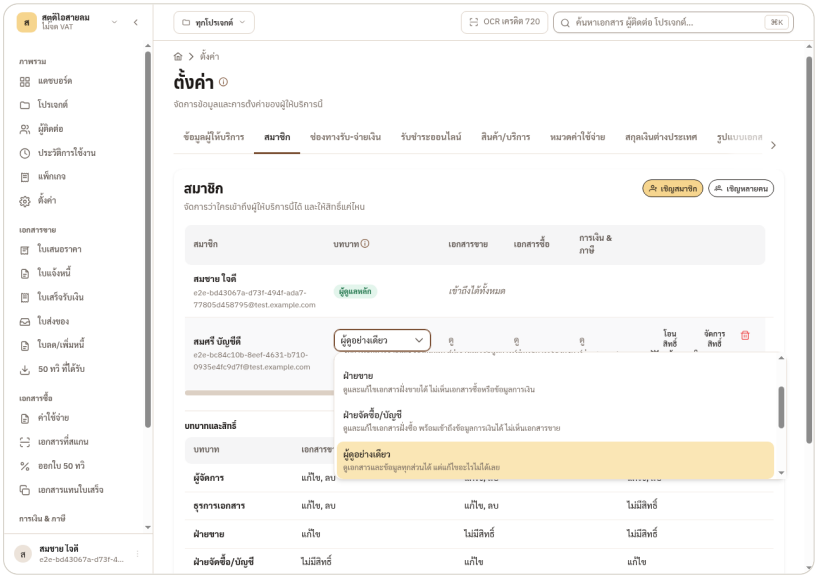
5 The invitee appears in the member list.



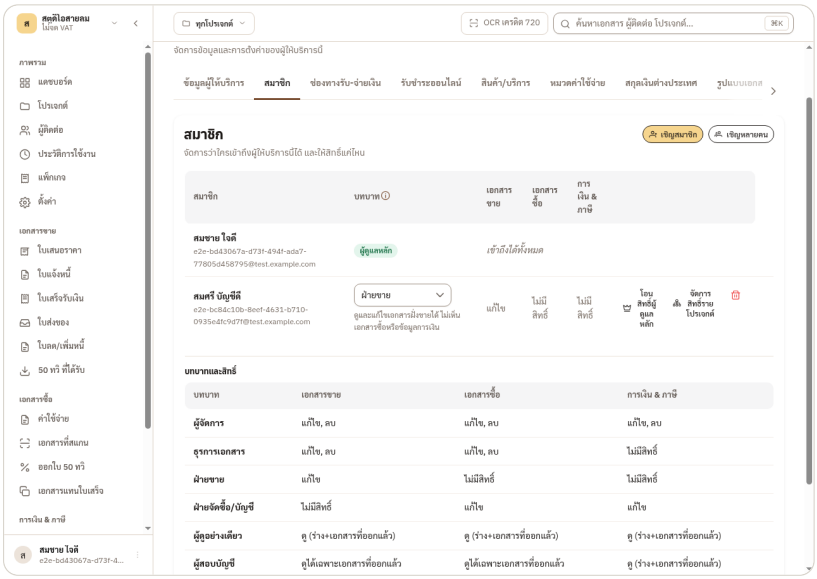
Invitations nobody has accepted sit under **คำเชิญที่รอตอบรับ**. Press **คัดลอกลิงก์** to send the link yourself, or **ยกเลิก**. If the email failed, the row shows **ส่งอีเมลไม่สำเร็จ** and a **ส่งอีกครั้ง** button. A cancelled link stops working. To invite several people with one role, press **เชิญหลายคน** and paste the emails separated by new lines, spaces or commas. EZer skips people who are already members, have a pending invitation, or appear twice.

16.4 Change a role and set a role per project

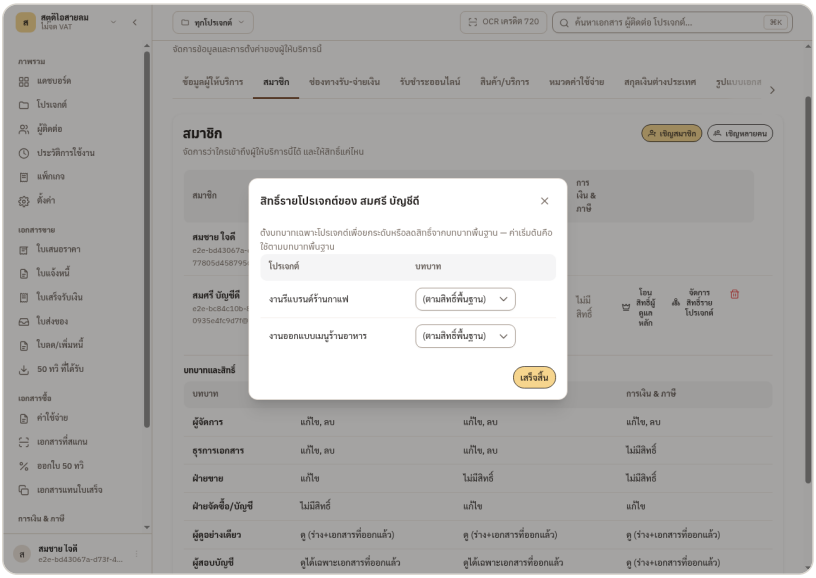
1 In the member’s row, open the role field to see each role with its description.



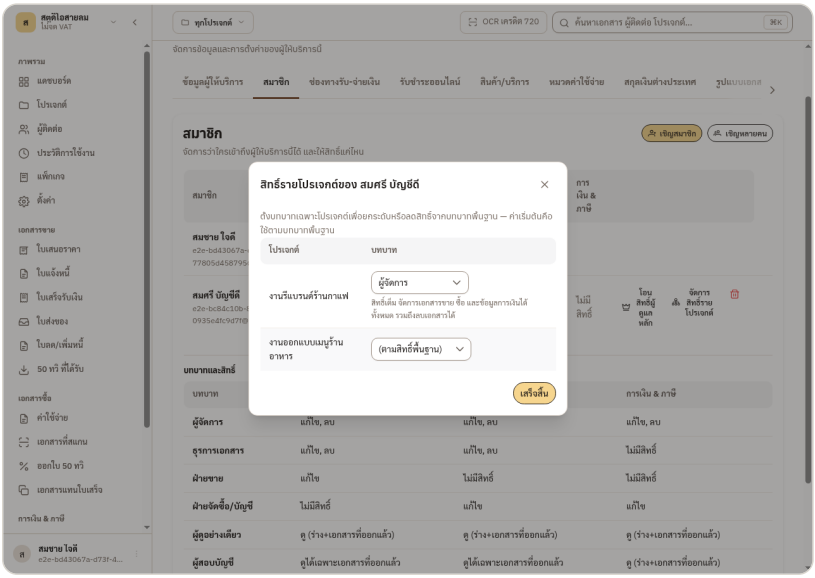
2 Pick the new role. EZer saves at once. There is no save button.



3 Press **จัดการสิทธิ์รายโปรเจกต์**. Each project starts at (ตามสิทธิ์พื้นฐาน), which means it follows the base role.



4 Choose the role for the project you want. EZer saves each row as you go. Press **เสร็จสิ้น** when you are done.



What a role per project can change

- A role per project changes only access to the sales and purchase documents of that project. It can raise or lower rights, for example a manager set to ไม่มีสิทธิ์ on a confidential project.
- Finance, locking, unlocking, closing periods and administration always follow the base role. Someone who is a manager on one project only is not an administrator.
- ธุรการเอกสาร cannot be set as a role per project.
- An auditor who has to lock documents or unlock them needs ผู้สอบบัญชี as the base role. Set only per project, the person reads that project's issued documents but cannot lock or unlock.

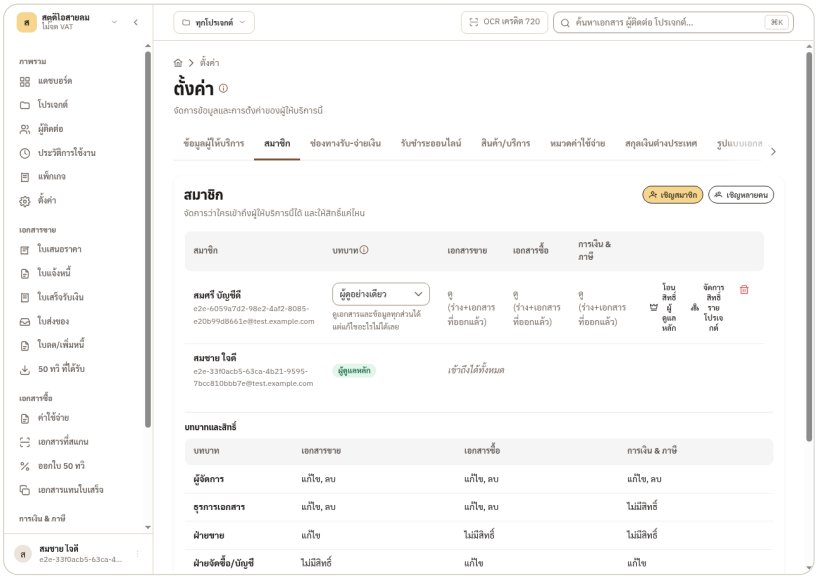
16.5 Remove a member

Press the bin button **นำออก** in the member's row and confirm. EZer records who removed whom. The main administrator cannot be removed. Hand the role over first.

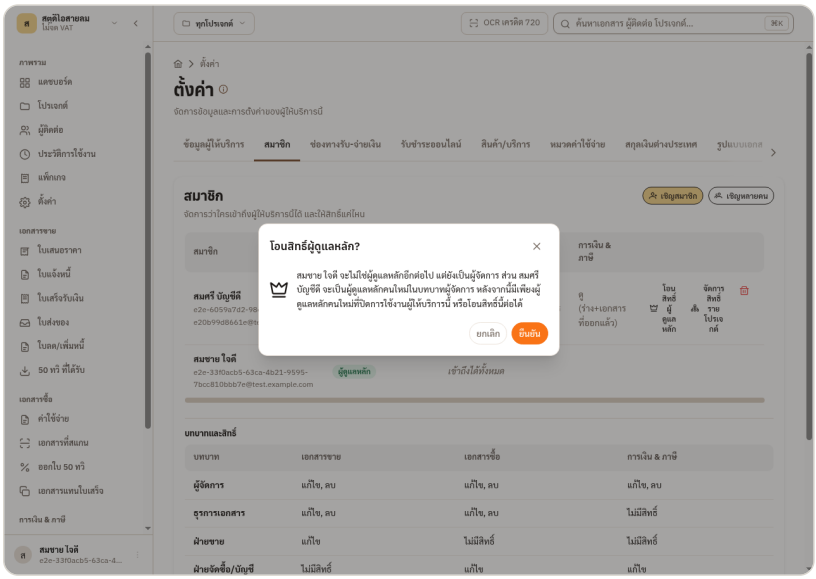
16.6 Hand over the main administrator role

The main administrator cannot leave the role and cannot lower their own rights. To step back, hand the role to another member. Only the main administrator can do this, and only the main administrator can deactivate the provider.

1. In the row of the member who takes over, press **โอนสิทธิ์ผู้ดูแลหลัก**.

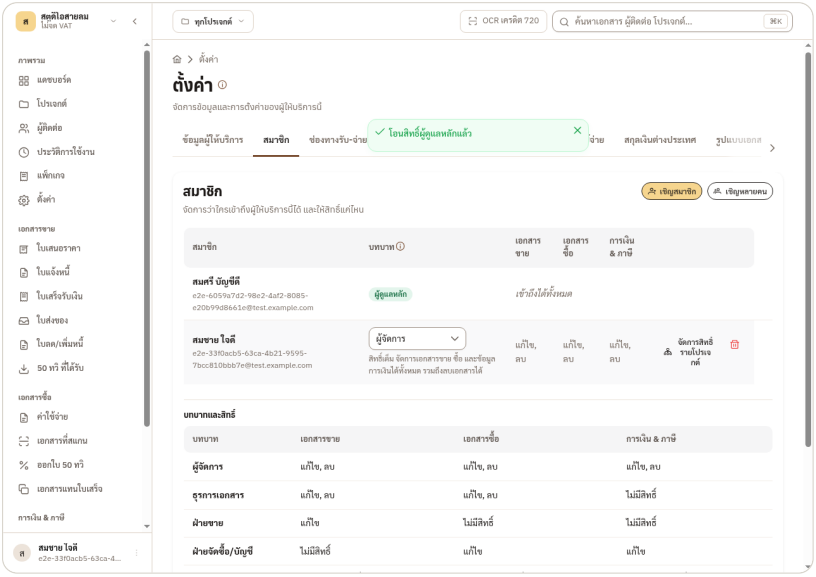


2 Read the confirmation and press **ยืนยัน**.



3 The new person's row shows the **ผู้ดูแลหลัก** tag.

> → **You should see** The new person is a manager, and the previous administrator stays a manager. The new person must already be an active member, and their old per-project roles are cleared.



16.7 What people without the right see

Everyone signed in can read the member list. A person who cannot manage members sees plain text, with no invite or remove buttons, no role field, and no

list of pending invitations. On other pages some buttons may still show. If your role cannot do the action, EZer refuses and tells you why.

> **Caution**
>
> A person who cannot manage members sees a note that only the main administrator manages members. The note is out of date. Managers can manage members too.

16.8 What next

Your team is in. See which roles need a package, and how to buy one.

Packages and billing(page 154)

PART D TEAM AND PACKAGES · CHAPTER 17

Packages and billing

> What a package is, who needs one, how to buy for yourself and for your team, how the days count, activation, promotion codes, credits and the tax invoice.

17.1 What needs a package, and what is free

A package is the right of one person to work on documents in EZer. The provider that paid for it owns it, and assigns it to one person.

You may work on documents at a provider when two things are true:

- You hold at least one live package, at any provider.
- That provider is **activated**.

Your role still decides what you may do.

Which work needs a package

Work that needs a package

- To create, edit, issue and delete documents, such as quotations, invoices, receipts, expenses and withholding tax certificates (50 ทวิ).
- To deliver a document to its recipient by e-mail or LINE.

What you can do with no package

- Read documents, as far as your role lets you.
- Edit the records that documents use, such as projects and contacts.

- Lock a document and unlock it, if your role allows it. Neither changes what the document says, so you may do both even at a provider that is not activated.
- Use a promotion code for yourself, in any role.
- Use a sandbox. A sandbox is activated from the start, and anybody with access may work on its documents with no package. To try EZer, try it in the sandbox, not in a real provider made for testing.

> **Caution**
>
> The app's "Lock" button marks the document locked. It does not deliver it, so it needs no package.

Managing the provider

The owner and every manager may do this work with no package, whether the provider is activated or not.

- Edit the provider's name, tax ID and address. The tax invoice needs them, so the people who pay must always be able to correct them.
- Invite a member, remove a member and change a member's role.
- Pay, and turn each package's card renewal on or off.
- Revoke an invitation, an API key, a trusted workload identity or a connected app, and transfer the Super Admin.

Which roles need a package

The roles that can work on documents need a package. The other roles are free. This counts a role on the provider and a role on a project alike.

Needs a package

- Manager (the Super Admin included)
- Document clerk
- Sales
- Purchasing / accounts

Needs no package

- Viewer
- Auditor (accountant)
- Customer
- A person who sends files into a LINE group bound to a project. They need not be a member either.

One package, many providers

One package works at every activated provider where you are a member.

An accountant who records documents for several clients works at all of them with one package. One who only checks documents can use the free auditor role.

If the owner wants a member to read only, even though that member holds a package elsewhere, give them the viewer role. That role works on no documents and spends no credits.

17.2 Prices and lengths

A package comes in three lengths. Prices include VAT.

1 month	
Launch price	฿299
Normal price	฿499
Credits up front	30

3 months	
Launch price	฿897
Normal price	฿1,497
Credits up front	180

12 months	
Launch price	฿2,990
Normal price	฿4,990
Credits up front	720

The launch price

- The launch price holds for the first 1,200 paid packages.
- Every purchase, renewal and card charge counts.
- Packages from a promotion code, free packages from EZer and switch-over packages do not count, because no money arrives.
- After 1,200, every purchase and every renewal pays the normal price, card charges included.

> **Caution**
>
> The launch price does not stay with you for good. After 1,200 packages, your next renewal pays the normal price too.

Days and billing cycles

- There is no charge by the day.
- There is no grace period after expiry.
- Each package has its own expiry date and its own billing cycle.

17.3 Buying a package for yourself

- Every payment is made on one provider's payment page.
- Only the owner and the managers may pay.
- The package bought stays at that provider.

The steps

1. Open the payment page of a provider where you are the owner or a manager. If you have no provider yet, create one first.
2. At your name, press buy and choose 1, 3 or 12 months.
3. If the provider has no tax ID yet, the payment page asks for it first, because the tax invoice needs it. A freelancer uses their national ID number.
4. Pay by card or by PromptPay.

After you pay

- The package's credits go into the paying provider's credit wallet.
- The tax invoice is issued to the paying provider.
- If the provider is not activated yet, this payment activates it.

See an example (1 example)

A buys 1 month for themselves · 1 Jan 2027

A may work on documents through	**31 Jan 2027**
Provider	A Design, newly created, with its tax ID entered
Price	฿299
A Design	Activated
Credits into the A Design wallet	30
Tax invoice issued to	A Design

If you are an employee and want to pay yourself

1. Create a provider of your own with your national ID number.
2. Buy the package there.

- Your provider is activated, gets the credits, and the tax invoice is issued to you.
- You then work at the provider that invited you, and nobody pays more, if that provider is activated.

17.4 Buying packages for your team

- The payment page lists every member of the provider.
- Each one shows their package at this provider.
- A member with none here, whose role needs a package, has a buy button.

The role first, then the package

1. Give the member a role that needs a package.
2. Buy them the package.

- A member whose roles need no package, on the provider and on every project, has no buy button.
- The button appears once you give them a role that needs one.
- The purchase page always says that reading documents needs no package: a package is for working on them.

> ⚠ **Warning**
>
> Buying for somebody else gives you no package. If you pay only for an employee, your provider is activated, but if you hold no live package anywhere, you still cannot work on documents yourself. In that case the payment page warns you before it charges, and offers to add your own package to the same payment.

See an example (1 example)

A buys B 3 months · 16 Jan 2027

B may work on documents through	**15 Apr 2027**
A invites B into A Design as	Document clerk
Price	฿897
B works at	A Design and every activated provider where B is a member
Credits into the A Design wallet	180
B's activations	One, because B is not A Design's owner

A person who holds a package elsewhere

A person who already holds a package elsewhere needs no second one. The invite screen says so too.

For example, C bought a 12-month package at C's own provider, and A invites C into A Design as sales. C works on A Design's documents at once, and A pays nothing.

> **Caution**
>
> The payment page does not say whether a member holds a package at another provider, because that belongs to the other provider. So C still has a buy button at A Design. If A presses it, C holds two packages, each expiring on its own date. Ask the person before you buy.

A person holds at most one package at each provider, and may hold several at several providers.

17.5 How the days count

- **When does my package end?** Count forward the months you bought, then step back one day. That day is the last day you can edit. This works for a purchase on the 1st to the 28th. For the 29th, 30th, 31st and month ends, see cases 2 and 3.
- The last day counts. While the package is live, the screen shows "แก้ไขได้ถึง 31 ม.ค." (editable until 31 Jan). After it expires, the screen shows "หมดอายุเมื่อ 1 ก.พ." (expired on 1 Feb).

Which day you buy decides how long it lasts

1. **Buy on the 1st to the 28th.** You can edit until the day before the same date in the later month.
2. **Buy on the 29th, 30th or 31st.** The later month may not have that date. If it has, step back one day as in case 1: a 3-month package bought on 30 Jan 2027 lasts through 29 Apr. If it does not, the package lasts to the last day of that month. For example, February 2027 has 28 days, so it has no 29th, 30th or 31st.
3. **Buy on the last day of a month.** The package always ends on a month end. You lose no days because a month is short. In a leap year February has 29 days, and 29 Feb also counts as a month end. The year 2028 (2571 in the Thai calendar) is a leap year.

> **Caution**
>
> **If more than one case fits,** use case 3 first. If the purchase day is the last day of its month, use case 3. Example: 28 Feb 2027 is both the 28th and a month end. Use case 3.

See all examples (8 examples · the Thai year 2570 is 2027)

Case 1 · Buy 1 month · 1 Jan 2027	
Editable until	31 Jan 2027
Expires on	1 Feb 2027

Case 1 · Buy 3 months · 16 Jan 2027	
Editable until	15 Apr 2027
Expires on	16 Apr 2027

Case 1 · Buy 12 months · 20 Jan 2027	
Editable until	19 Jan 2028
Expires on	20 Jan 2028

Case 2 · Buy 1 month · 30 Jan 2027 (Feb has 28 days)	
Editable until	28 Feb 2027
Expires on	1 Mar 2027

Case 3 · Buy 1 month · 31 Jan 2027 (a month end; Feb has 28 days)	
Editable until	28 Feb 2027
Expires on	1 Mar 2027

Case 3 · Buy 1 month · 30 Apr 2027 (a month end)	
Editable until	31 May 2027
Expires on	1 Jun 2027

Case 3 · Buy 3 months · 31 Jan 2027 (a month end)	
Editable until	30 Apr 2027
Expires on	1 May 2027

Case 3 · Buy 1 month · 28 Feb 2027 (a month end)	
Editable until	31 Mar 2027
Expires on	1 Apr 2027

Renewing before it expires

The first start date stays. The new months go on the end. You lose none of the days left.

See examples of renewing 1 month at a time (2 examples)

Start 30 Jan 2027	
First purchase, until	**28 Feb**
Renewal 1, until	29 Mar
Renewal 2, until	29 Apr
Renewal 3, until	29 May

Start 31 Jan 2027 (a month end)	
First purchase, until	**28 Feb**
Renewal 1, until	31 Mar
Renewal 2, until	30 Apr
Renewal 3, until	31 May

Renewing late

The count starts again on the payment date. The time it was expired does not come back.

Example: renewing after expiry	
Editable until	**9 May 2027**
The old package was editable until	31 Jan 2027
You renew 1 month on	10 Apr 2027
Not given back	**1 Feb – 9 Apr 2027**

Paying on the expiry day

- This counts as paying after it expired. Most of the time the result is the same as renewing before it expires.
- The payment date is the date in Thailand's time zone.
- The one exception is a card charge on the expiry date.

see section 17.9 **A card charge on the expiry date**(page 174)

See examples of paying on the last day and on the expiry day (2 examples)

Start 31 Jan 2027 · renew 1 month on 28 Feb 2027	
Editable until	31 Mar 2027

Start 31 Jan 2027 · renew 1 month on 1 Mar 2027	
Editable until	31 Mar 2027

More about renewing

How many months can I renew?

Each renewal may choose 1, 3 or 12 months.

Which length does the payment page select?

It selects the package's last length first.

What counts as the "last length"?

It counts paid terms only. A code or a free package from EZer does not change it. Example: 12 months paid, then a 1-month code, and the card still renews 12 months.

How many months does a package with no paid term get?

The payment page selects 1 month first.

Do I get credits when I renew?
Yes. Each renewal brings the credits of its length into the paying provider's wallet.

Whose packages can I renew on a provider's page?
Only the packages at that provider.

What does the button "ต่ออายุทั้งหมด" (renew all) do?
It renews every package at this provider in one payment. It never buys a new package. A member with no package here is not charged. An unassigned package is left out.

What if one package is paid twice at the same time?
Both payments count. Each adds its months. If you did not mean to pay twice, contact the EZer team about a refund.

> ⚠ **Warning**
> There is no grace period. The expiry date is the first day you may not work on documents. After expiry you can still read documents, the credits stay in the wallet, and if you hold another live package you work on as usual.

The countdown. From 7 days before the last day, the holder sees a countdown.

17.6 Activating a provider

You may create any number of providers. A new provider is not activated.

- At a provider that is not activated, nobody may work on documents. This includes a person with a package elsewhere.
- Documents are read-only, except locking and unlocking.

- The owner and the managers may still manage the provider: edit its details, invite members and pay.

Rule 1: when a provider is activated

A provider is activated when:

- A package is paid for on its own page, whoever it is for.
- Somebody uses a promotion code there. A member of any role may use a code, so a viewer can also activate a provider that way.

Rule 2: activations

When you get your first package at a provider you do not own, you get one **activation**.

- You use it to activate one provider of your own.
- The package may come from a payment, a code, a free package from EZer or the switch-over.
- The owner here is the Super Admin on the day of the payment.
- A later transfer of the Super Admin does not change an activation already given.
- You get one activation from each provider, however many times you get a package there.

See an example (1 example)

A buys B a package at A Design twice

Activations B gets from A Design	One
The first package	One activation
The package expires, and A buys B another	No second activation
B gets a package from a different provider	A new activation from that one

About activations

- An activation never expires.
- A renewal, a payment after the package expired and a code bring no second activation, because you already got one from that provider.
- A provider activated this way gets no credits. A package's credits always go to the paying provider.
- A manager who buys a package for themselves at a provider they do not own gets an activation too, if they have none from that provider yet.

> **Caution**
> A move and the assignment of an unassigned package bring no activation. If your first package at a provider came that way, you get the activation the next time you get a package there from a payment, a renewal, a code or a free package.

How the activation is used

Mostly you press nothing: the activation is used by itself when the answer is clear. It depends on how many providers you own that are not activated when the activation arrives.

- **None.** The activation waits. The next provider you create is activated at once.
- **One.** That one is activated at once.
- **Two or more.** You pick which one to activate. This is the only case with a button.

If you close the picker

- The activation keeps waiting.
- A new provider you create takes it at once.
- If a payment activates one of two waiting providers, the one left takes it at once.
- A sandbox does not count, and never uses an activation.

> ⚠ **Warning**
>
> The activation is used without asking, on your one provider that is not activated or on the next one you create, and an activated provider stays activated for good. To try EZer, use the sandbox, not a real provider made for testing.

After activation

An activated provider

- It stays activated.
- If every package expires, the provider is not shut. But nobody works on documents until somebody holds a live package again.

A person who owns several businesses

- Activate each one once.
- After that, you may let some packages lapse. The package left still works at all of them.
- A provider with no payment gets no new credits. To get credits there, buy them at that provider.

17.7 Promotion codes and free packages

A promotion code gives one package to the person who uses it, of the code's length, with the same credits as a paid package: 30, 180 or 720.

- You use the code on one provider's page.
- The package stays at that provider.
- The credits go into its wallet.

Who may use a code

- Any role may use one, with no package and no tax ID, because a code issues no tax invoice.
- If the provider is not activated, using the code activates it.

- If you use a code at a provider you do not own and it gives you a package there, you get one activation, as if somebody had bought you a package. You get it only if you have none from that provider yet.

If you already have a package there

- **The package is live.** The code extends it, and that is your one use of the code.
- **The package has expired.** The code is a renewal after expiry: it starts a new count from that day. It brings an activation only if you have none from that provider yet.

The limits of a code

- One person may use each code once, whatever provider they use it at.
- A code has a limit on its uses and a window of dates.
- Credits from a code are recorded apart from credits bought.
- A code does not count toward the 1,200 launch-price packages.

See an example (1 example)

F uses a 3-month code · 5 Mar 2027

F may work on documents through	**4 Jun 2027**
Provider	F Studio, newly created, activated by the code
Credits from the code into the wallet	180
Later, the same code at a second provider	Refused, because F has used it already

Free packages from EZer

The EZer team may also give a **free package**. The screen shows "แพ็กเกจฟรีจาก EZer" (a free package from EZer).

- It works like a bought one: 1, 3 or 12 months, with 30, 180 or 720 credits.
- It activates the provider it is at.
- It has no payment and no tax invoice.
- If you already hold a live package there, it extends that package.
- If you do not own that provider and have no activation from it yet, a free package brings one, as a bought one does.
- If your package there has expired, a free package granted to you starts a new count from the day it is granted. It brings an activation only if you have none from that provider yet.

17.8 Moving a package, and when a member leaves

A package belongs to the provider that paid for it. That provider's owner or a manager may move it from B to C. Any live package may move, whatever it came from: a payment, a code, a free package or the switch-over.

The rules of a move

- C must be a member of that provider and must not hold a live package there.
- All the time left moves with it, and so do the start date, the card renewal switch and the last length.
- B loses the package everywhere, not only at that provider.

- An activation B already got stays with B. A move brings C none. If C has none from that provider yet, the next payment, renewal, code or free package for C there brings one.

> ⚠ **Warning**
>
> If it was B's only live package, B works on documents nowhere, B's own provider included, because the package belongs to that provider, not to B.

> ⚠ **Warning**
>
> A package from your own code may move too. If you use a code at somebody else's provider, the package belongs to that provider. Its owner may move it to somebody else, and you cannot use that code again. If you want to keep the package, use the code at your own provider.

When a member leaves

When B is removed from the provider, B's package there becomes a "แพ็กเกจว่าง" (unassigned package), held by nobody.

- Its time keeps running, and nothing is refunded.
- Its card renewal switch turns off. "ต่ออายุทั้งหมด" leaves it out, but it may be renewed on its own.
- Its notices go only to the owner and the managers.
- An unassigned package counts as nobody holding a package, for LINE as well.

Assigning an unassigned package

- The owner or a manager may assign it to a member under the same rule as a move: the package is live, and the member holds no live package there. The assign button shows only when the rule allows it.
- If B is invited back, B does not get the package back by itself, but it may be assigned to B again.
- After it is assigned again, the card renewal switch stays off. The owner or a manager may turn it on. A move between two current members keeps the switch as it was.

> **Caution**
>
> An expired unassigned package cannot be assigned. Renew it or buy a new package first.

17.9 Paying by card or PromptPay

- You pay by credit or debit card, or by PromptPay, on the provider's payment page.
- One payment you make by hand may pay for several packages at once, as "ต่ออายุทั้งหมด" does.
- A saved card belongs to the provider, and renews only the packages at that provider.

The card renewal switch

- Each package has its own card renewal switch, and it starts off. The owner or a manager may turn it on. A 1-month package may renew by card too.
- Turning off one package's switch keeps the saved card. It does not change the switches of the other packages.
- The switch cannot be turned on for an expired package: buy a package instead.

When the card is charged

- The card is charged for each package on its own, on that package's date, for that package's last length. For a package with no paid term, the card charges 1 month.
- The card is charged 7 days before the expiry date. A problem then reaches you while the package is still live. It is a renewal before expiry, so the new months follow the old ones, and the early charge costs you no days.

> **Caution**
>
> A switch turned on less than 7 days before the expiry date charges the card at once.

The notice before a charge

- **A 12-month package** is told 7 days before the charge, which is 14 days before it expires.
- **A 3-month package** is told 7 days before every charge too.
- **A 1-month package** is told 3 days before the charge, only when the amount changes, for example when the price changes.

If a charge fails

It is tried again, counted from the expiry date:

1. **7 days before the expiry date.** The first charge.
2. **3 days before the expiry date.** A retry, if the first charge failed.
3. **The expiry date.** The last retry. From midnight until it succeeds, the holder may not work on documents. If it succeeds, the package keeps its start date.

Each failure is reported to you.

If the card charge goes wrong

Symptom	Cause	Fix
You get a payment link, and the retries stop	The card needs you, for example for 3DS or because it is blocked.	Pay through that link. If you pay through it on the expiry date, it still counts as a card renewal, and the package keeps its start date.
The saved card is gone, and the owner and the managers are told, with a button to save a new card	The card was declined for good, for example because it is blocked, so the system removed it.	Save a new card. Every switch stays on, so nobody turns them on again one by one. If a new card is saved in time, it is charged. If not, each package's charge date sends a payment link instead.
A package expired although its card renewal was on	It was still unpaid at the end of the expiry date, so it expired as usual. Only that package lapses: the other packages at the same provider are not affected.	Buy a package, because the switch cannot be turned on for an expired package.

Who is told, and your packages page

- The owner and the managers of the paying provider get every notice.
- The holder gets a short notice that their package at that provider will expire or was not renewed, and whom to ask. The holder never sees the card details.
- Every person has a page of their own packages: the provider each is at, its last day, whether the card renews it, and any unused activation. It shows no card and no amount.

17.10 Credits and OCR

Credits pay for reading documents with OCR: 1 credit for 1 page. Each provider has one credit wallet, shared by everybody who works on documents there.

Credits from a package

- A package brings its credits as soon as it is paid, 30, 180 or 720, into the paying provider's wallet.
- Credits never expire, and they add up.
- Package credits are spent before bought credits.
- Credits are spent by work on documents, which already needs a live package.

Buying more credits

- You may buy more credits at ฿1 a credit, in any amount.
- Credit packs with bonus credits may come later.
- The owner and the managers buy them, because buying is paying.
- A provider where no member holds a live package may still buy credits.

17.11 LINE

Binding a LINE group is managing the provider, so you may do it even before the provider is activated. A LINE group always accepts a file and stores it.

When a file is read with OCR

EZer reads the file with OCR at once when three things are true

- The provider is activated.
- At least one member holds a live package. An unassigned package does not count.
- The wallet still has credits.

If a file is not read

If not, the bot says why in the group, and says the file will not be read.

Symptom	Cause	Fix
The bot says the file will not be read, because the provider is not activated	The provider is not activated.	Activate the provider, for example by paying for a package or using a promotion code there. Then a member with a live package orders the file read with OCR.
The bot says the file will not be read, because the credits ran out	The credits ran out.	The owner or a manager buys more credits. Then a member with a live package orders the file read with OCR.
The bot says the file will not be read, because no member holds a live package	No member holds a live package. An unassigned package does not count.	Make sure at least one member holds a live package. Then that member orders the file read with OCR.

> **Caution**
>
> A stored file is not read later by itself. It waits among the incoming documents until a member with a live package orders it read with OCR, which spends the credits then. There is no storage limit for now.

Who may send files

- **A group bound to a project.** A person who sends files into it needs no role and no package, because the group does not check who sends.
- **A 1:1 LINE chat with EZer.** Sending a document this way is work on documents: the sender needs the right to capture documents into the provider and a live package, and the provider must be activated.

17.12 The tax invoice and the receipt

- The tax invoice is always issued to the paying provider, because a tax invoice needs a tax ID and only a provider has one.
- It is e-mailed to the person who paid.
- It can be downloaded from the provider's payment page, which only the owner and the managers see.

The note of who paid

The receipt and the tax invoice print a note of who paid and how:

- The payer's name and e-mail.
- The method: the card brand and last 4 digits, or PromptPay. If the payment gateway gives no brand or digits, the note reads "บัตรเครดิต/เดบิต" (credit/debit card).

- The payment gateway's reference.
- A card renewal names the person who turned its switch on.
- For a transfer that the EZer team records, the note reads "โอนเงิน" (transfer), with the reference, name and e-mail the team recorded.

The note lets an employee who paid for the employer claim the money back. The tax invoice still names the paying provider.

When there is no tax invoice

These three have no tax invoice, because no money is paid:

- A promotion code.
- A free package from EZer.
- A switch-over package.

17.13 Refunds

> ⚠ **Warning**
> The EZer policy is no refunds.

Now and then the EZer team may refund as goodwill. If you think your case deserves one, for example a payment made twice by mistake, contact the team.

When a refund is made

- It is always for whole packages, never a part of one. The team names which packages of the payment it covers.
- The package loses the months refunded, and its start date stays.
- The refunded package's credits are taken from the wallet, at most what is left. The wallet never goes below zero.

- An activated provider stays activated, and no activation is taken back, used or not.

See an example (1 example)

A renews B's package for 1 month · 10 Apr 2027, and the team later refunds this payment

After the refund, B's last day is	**15 Apr 2027 again**
After the renewal, last day	15 May 2027
The A Design wallet got	30 credits
If the wallet holds 30 credits or more	**30 are taken**
If the wallet holds 12 credits	**12 are taken, and it is left at 0**

17.14 Closing a provider

- A provider is archived instead of being deleted.
- Only the Super Admin may archive a provider.
- EZer keeps its data for as long as the law requires, and deletes it only after that.

When a provider is archived

- The packages at it stay live until they expire, and none renews. Their holders still work at other providers.
- An unassigned package there runs out.
- The credit wallet stays with the provider, and comes back if the provider is restored.

17.15 The switch to packages

EZer announced the switch-over day. On that day EZer moved from the old system to packages.

- If you already used EZer on that day, **you did not need to do anything**.
- Everybody got the same 3-month package at no charge, starting on the switch-over day, and could work on documents for 3 months from that day.

Who got what

- **A provider owner** got a 3-month package at each provider they own, and that provider was activated.
- **An invited member whose role could work on documents**, on the provider or on any project, got a 3-month package at the provider that invited them, and one activation from that provider.
- **A member in a free role** got nothing, because their role was free already.
- **A sandbox** got nothing, because it needs no package.

The details

- One package for each provider. A person who owned two providers and was invited to a third got three packages.
- Each package brought 180 credits into the wallet of the provider it is at. The credits already there stayed.
- If you had already bought a package at that provider before the switch-over day, you got no second package. Your package got 3 more months and 180 credits.
- These packages had no tax invoice and did not count toward the 1,200 launch-price packages.

- Free months left from the old launch offer were not carried over. Everybody got the same 3 months.
- After the 3 months, you renew as usual.

PART E CONNECT · CHAPTER 18

Connect your AI assistant to EZer

> Connect an AI assistant to your EZer over MCP so it can read your data and help with the work, with you deciding what it may do.

18.1 How to connect

MCP is a standard that lets an AI assistant connect straight to an app. Once connected to your EZer, the assistant can answer questions like "how much did this project spend this month?" or record an expense from a receipt (ใบเสร็จรับเงิน) for you, and you decide what it may do.

> We have tested this connection with Claude and ChatGPT. Other assistants may work, but we have not tried them. If you run into trouble, try Claude or ChatGPT.

The address to connect to (MCP)

```
https://ezer-backend.hbg-th.com/mcp
```

1. In your assistant's settings, add a custom connector (an MCP server) and paste the address above. Menu names differ from one assistant to another.
2. The assistant takes you to sign in to EZer. Use your normal EZer account.
3. EZer shows a permission page. Choose which providers the assistant may reach. The summary on the page says what the assistant will be able to do. To change the permissions, press the edit button. Choose only what you need, then press the allow button.

4. Go back to the assistant and type what you want help with, in plain words.

EZer's permission page shows these (the permissions heading appears after you press edit)

ให้เข้าถึงผู้ให้บริการใดบ้าง?	แก้ไข	ให้สิทธิ์ใดบ้าง?	อนุญาต

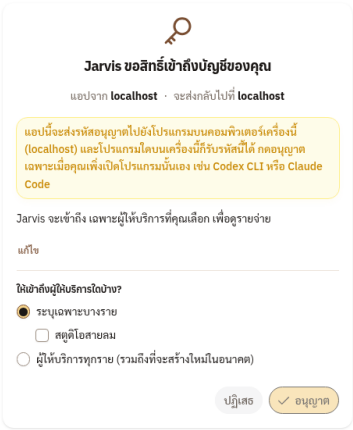


Figure 18-1 EZer's permission page: choose the providers, then press the allow button. This picture is an example: your assistant's name appears in its place.

Permissions come in three groups: revenue, expenses and finance data. Revenue and expenses have the levels view, edit, delete and audit. Finance data has view, edit and delete. The view-level permissions are

ดูรายรับ **ดูรายจ่าย** **ดูข้อมูลการเงิน**

> The permission page can reduce what the assistant asks for, but it cannot add more. If the assistant asks for edit permissions, press edit and remove the ones you do not need.

> Start with view-level permissions only. If you grant edit, the assistant can create and change your real documents. Ask it to confirm before it creates, edits or locks anything, because a locked document cannot be edited.

> The assistant never gets more rights than you have. If you are removed from a provider, your assistant loses access to it as well.

You can withdraw access at any time. Every user can do it at this page and section: press the revoke button on the assistant's row

บัญชีของฉัน **แอปที่ได้รับอนุญาต** **เพิกถอน**

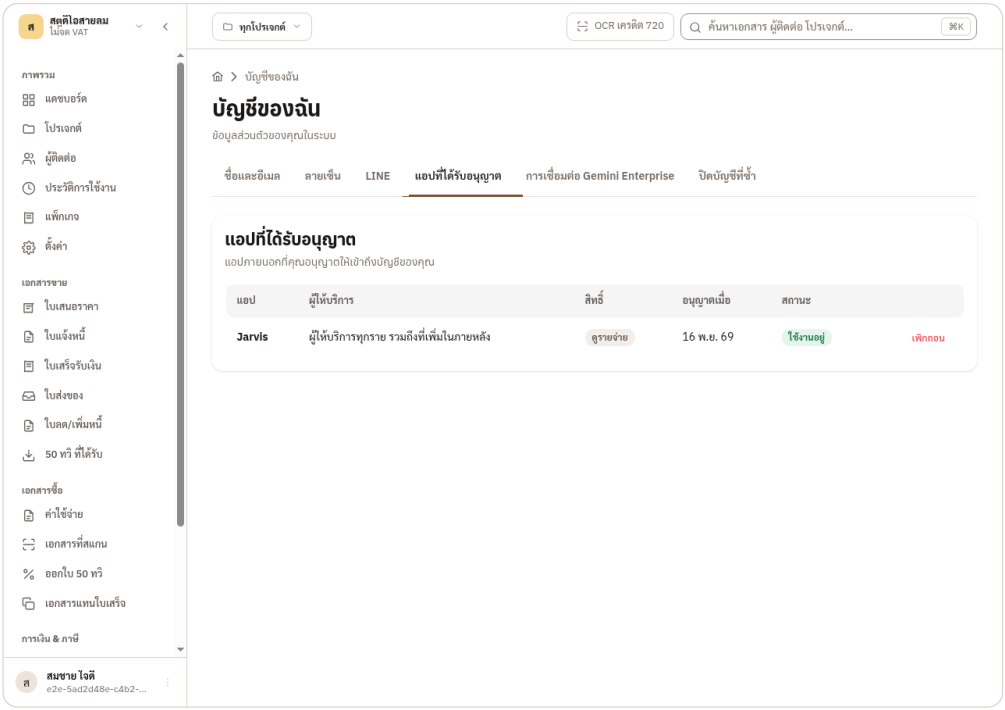


Figure 18-2 The assistants you have allowed are listed in your account, with a revoke button. This picture is an example: your assistant's name appears in its place.

A provider's administrators can also see and revoke every member's assistants, in this page, tab and section of that provider

ตั้งค่า **คีย์ API** **แอปที่เชื่อมต่อ** **เพิกถอน**

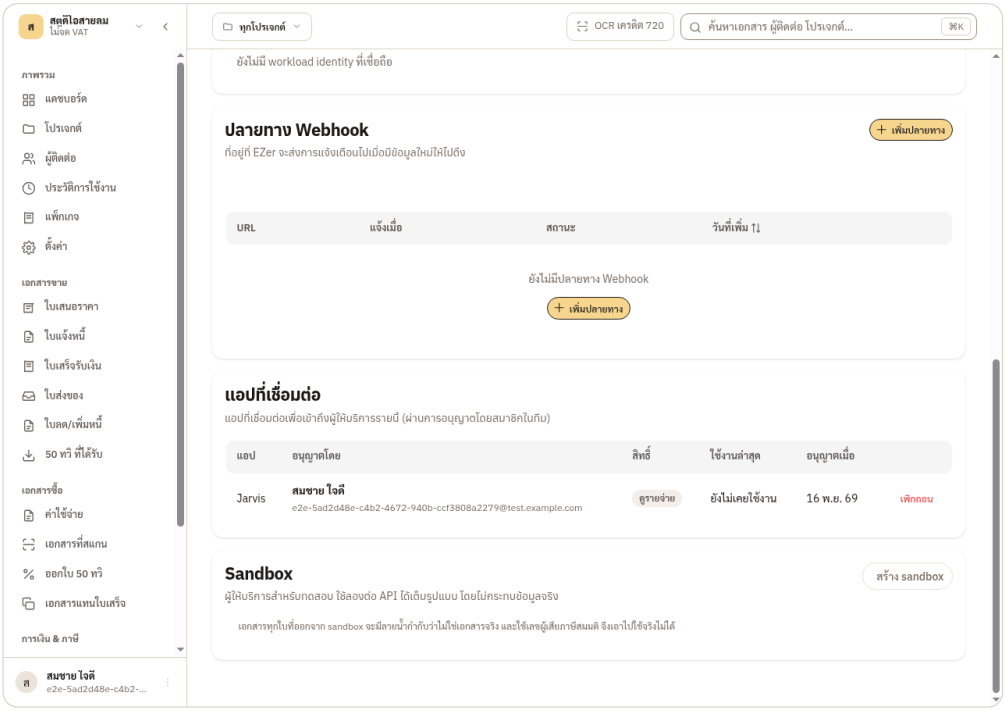


Figure 18-3 The administrator's view lists every app connected to this provider. This picture is an example.

18.2 Connect Gemini Enterprise

Gemini Enterprise asks for a client ID and a client secret when an MCP server is added, and only the admin of the Google workspace can add one. So you create a connection in EZer and give the values to that admin.

Create the connection in this page and section

บัญชีของฉัน **การเชื่อมต่อ Gemini Enterprise** **สร้างการเชื่อมต่อ**

1. Give the connection a name, such as the name of the workspace, and create it. Everyone who signs in through it sees this name.
2. EZer shows every value the Gemini Enterprise form asks for. Copy the client secret now, because EZer does not show it again.
3. Give these values to the workspace admin. The admin adds a custom MCP server in Gemini Enterprise, pastes each value into its field and turns on Enable PKCE Support.
4. Each person in the workspace signs in to EZer with their own account and chooses which providers and permissions to grant, as with any other assistant.

The values the admin pastes into Gemini Enterprise

MCP server URL **Authorization URL** **Authorization URL parameters**

Token URL **Client ID** **Client secret** **Scopes**

> If the secret leaks, issue a new secret: the old one stops working at once. If you delete the connection, everyone who signed in through it loses access at once.

> We have not yet tested this with a real Gemini Enterprise workspace. The field names come from Google's documentation.

PART E CONNECT · CHAPTER 19

API keys and webhooks

> Create an API key so other software can call EZer, and set up a webhook so EZer tells your software when something new happens.

19.1 Which one you need

- **API key**: lets your software call EZer to read or write data.
- **Webhook**: lets EZer tell your software that something new happened. Your software then pulls the data through the API.
- **An AI assistant**: you need no key for that. See the chapter on connecting your AI.

Connect your AI(page 184)

Both live in **ตั้งค่า**, on the **คีย์ API** tab.

19.2 Create an API key

Every member can create a key of their own. One key works for one provider, so three providers need three keys. A key never has more rights than its owner. If the owner leaves the provider, the key stops working.

1. Open **ตั้งค่า**, the **คีย์ API** tab, and press **สร้าง API key**.
2. Fill the **ชื่อ**, for example the name of the software that will use this key.
3. Choose the **ระดับสิทธิ์**: **อ่าน-เขียน** or **อ่านอย่างเดียว**. If the software only reads data, choose read-only.

4. Choose the **อายุการใช้งาน**: never, or 1, 7, 30, 90 or 365 days. You choose it only now. You cannot change it later.
5. Press **สร้าง**.
6. EZer shows the key once. Press **คัดลอก** and store it safely before you press **เสร็จแล้ว — ปิด**.

> ⚠ **Warning**
> EZer keeps only the start of the key and a hash, so it cannot show the full key again. If you lose it, create a new one and cancel the old one. Do not send a key by chat or email, and do not put it in code other people can see.

See and cancel keys

The table shows the name, access level, start of the key, owner, last use, expiry and status. A member sees only their own keys. The main administrator and managers see and cancel every key of the provider. If a key leaks, press **ยกเลิก key** on its row and confirm. A cancelled key cannot be restored, and the row shows **ถูกยกเลิก**. An expired key also shows **ถูกยกเลิก** and has no cancel button.

EZer has no rotate button. To replace a key, create a new one, switch your software to it, then cancel the old one.

> **Caution**
> Only a signed-in person can create or cancel keys. A key cannot create or cancel keys, and it cannot manage members, invitations or payment gateway connections.

19.3 Call the API with a key

Send the key in the Authorization header. This example asks what the key can do in one provider. Use your own key, which starts with ezk_, in place of the sample text.

```
GET /api/providers/{provider_id}/my-access
Authorization: Bearer ezk_xxxxxxxx
```

- A request that writes or changes data (POST, PUT, PATCH, DELETE) needs an **Idempotency-Key** header: a unique string up to 200 characters. If you retry after a network drop, reuse the same value. Without it, EZer answers 400.
- A read-only key cannot write. Every write answers 403.
- Errors carry a `code`. Let your software act on the code. The Thai and English messages are for people.
- The API does not promise a frozen shape. New fields can appear at any time, so your software must not break on a field it does not know.

The full reference is on the **สำหรับนักพัฒนา** card in the same tab, with the links **เอกสาร API** and **ข้อกำหนด OpenAPI**. Take the server address from that document.

19.4 Set up a webhook

A webhook from EZer is only a nudge. EZer says something new happened, and sends no data or counts with it. Your software must pull the real data through the API with a key. So a repeated or out-of-order nudge does no harm.

The main administrator and managers manage webhooks. The section is hidden from anyone without the right, and you can set it up only while signed in. An API key cannot do it.

1. In the **คีย์ API** tab, go to the **ปลายทาง Webhook** section and press **เพิ่มปลายทาง**.
2. Fill the **URL** where your software takes requests. It must be https and a public internet address. An internal address or your own machine (localhost) is refused. To test, use a service that opens a temporary public https entry.
3. Tick the events you want under **ส่งการแจ้งเตือนเมื่อ**. A new endpoint starts with the filing event only.
4. Press **เพิ่ม**.

The events EZer can nudge about

- **รายการถูกล็อกแล้ว**: records of a provider for one month were locked. One nudge per event, not per record. It does not mean anything reached the Revenue Department.
- **ลิงก์ชำระเงินออนไลน์เปลี่ยนสถานะ**: an online payment link became paid, expired, failed or cancelled. No nudge when it only opens as pending.

Accept online payments(page 74)

What your software receives

EZer sends a POST with JSON holding type, event_id, provider_id, month (the first day of the month), occurred_at, and subject_id for the payment-link event only. Use event_id to avoid processing twice, then pull the data through the API.

There is no shared secret and no signature to check. EZer proves who it is with a Google ID token in the Authorization header as a Bearer token, whose aud is the URL of your endpoint. The token says who called. It does not prove the body is unaltered, but the body holds no data anyway. Always pull data from the API.

> **Caution**
>
> Do not mix this up with the inbound webhook of a payment gateway. That one has its own secret and belongs to the chapter on online payments.

When delivery fails

A failure is any answer other than 2xx (a 3xx redirect counts, EZer does not follow it), a connection error, or no answer within 10 seconds. EZer tries six times in all, with gaps of 10 minutes, 30 minutes, 2 hours, 6 hours and 14 hours, about 23 hours in total, then stops. The endpoint's row shows the **ส่งไม่สำเร็จ** tag and EZer emails the person who added the endpoint (the main administrator, if that person is gone). EZer never turns an endpoint off by itself. When a later delivery succeeds, the tag clears.

Press the **ประวัติการส่ง** icon on the row (its name shows on hover) to see each attempt, with its status, event, time, attempt number and error. EZer keeps them for 90 days. The status **ยังไม่ได้ส่ง** means EZer had no identity to sign the request, so nothing was sent. A row that is not waiting has a **ส่งอีกครั้ง** button, which uses the same event_id. **แก้ไข** on the endpoint row changes the URL or the events, and **ลบ** stops the nudges.

19.5 What next

To let an AI assistant work with EZer without writing code, see the chapter on connecting your AI.

Connect your AI(page 184)