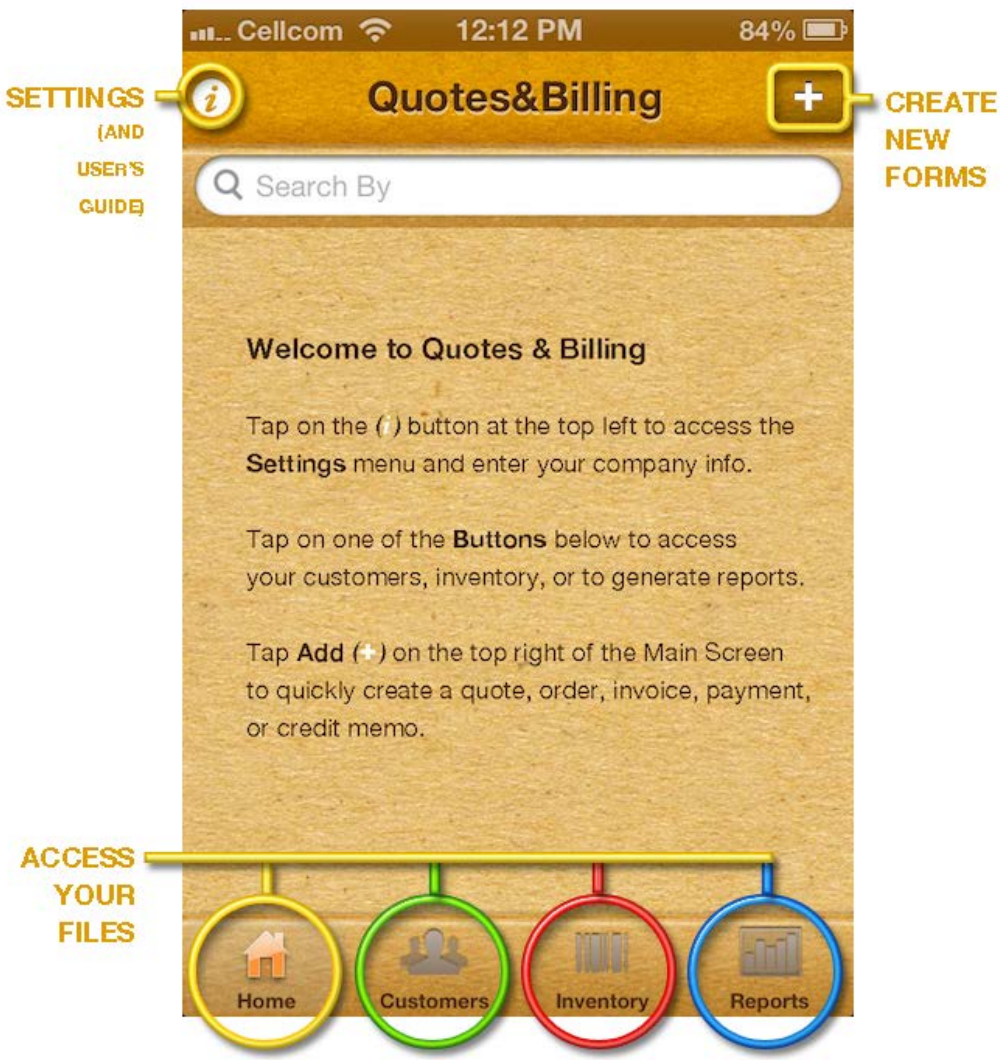
Using QUOTES & BILLING

QUICK START…

From the Q & B main screen you can access most of the major sections in the program. Select the **(+) Button** to create NEW **Quotes**, **Orders** and **Invoices,** as well as to **Accept Payments.** The **(i) Button** gives you access to the key **Settings** screen. The **Search Box** allows you to search for a specific Quote, Order or Invoice. You can **ADD** customers and/or inventory items, either as you create a quote, or by selecting the icons at the bottom of the **Main Screen (see below).**

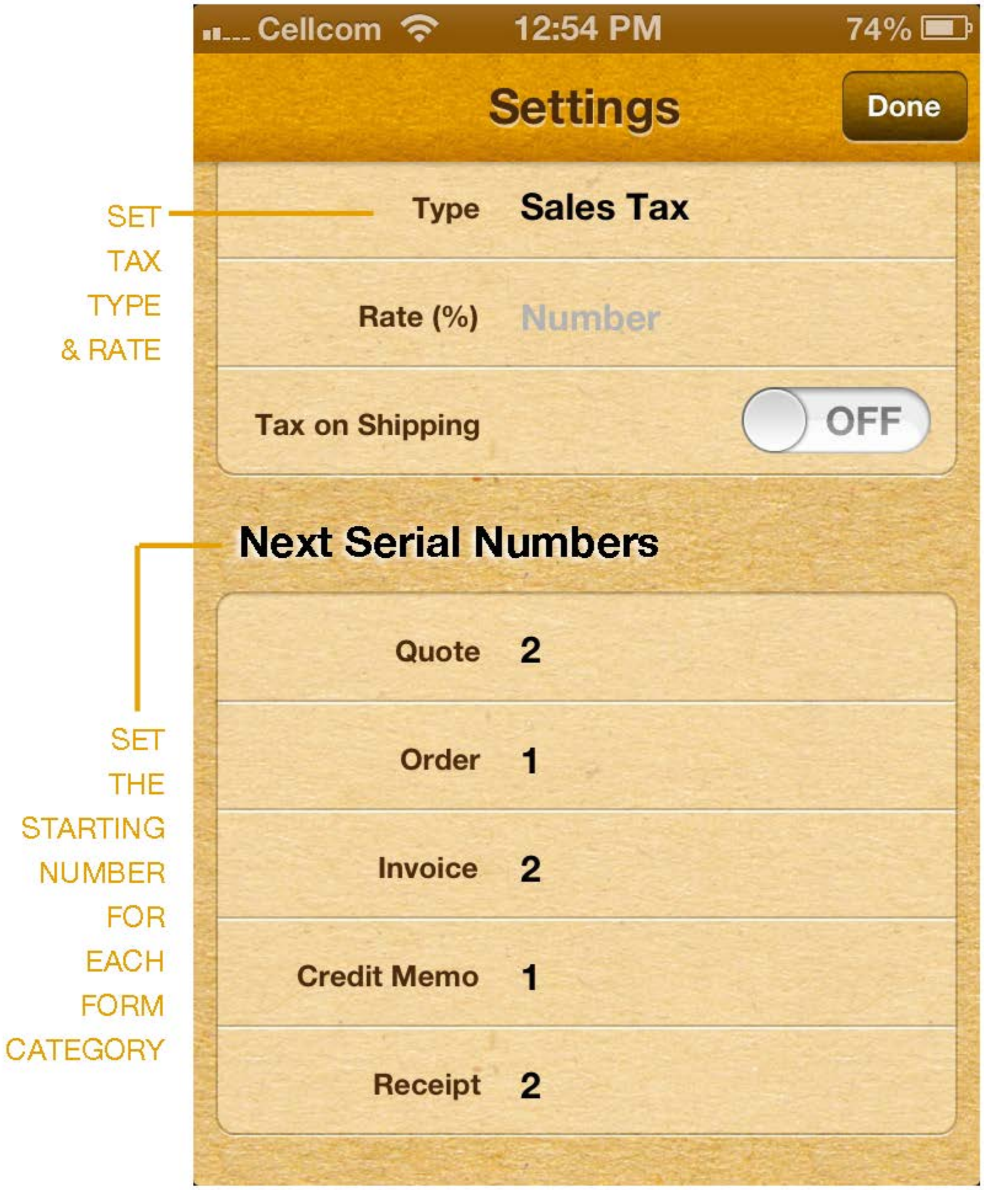


GETTING STARTED

STEP 1 Select the **i** button and then…

STEP 2 Select **Settings** to set up your company information.

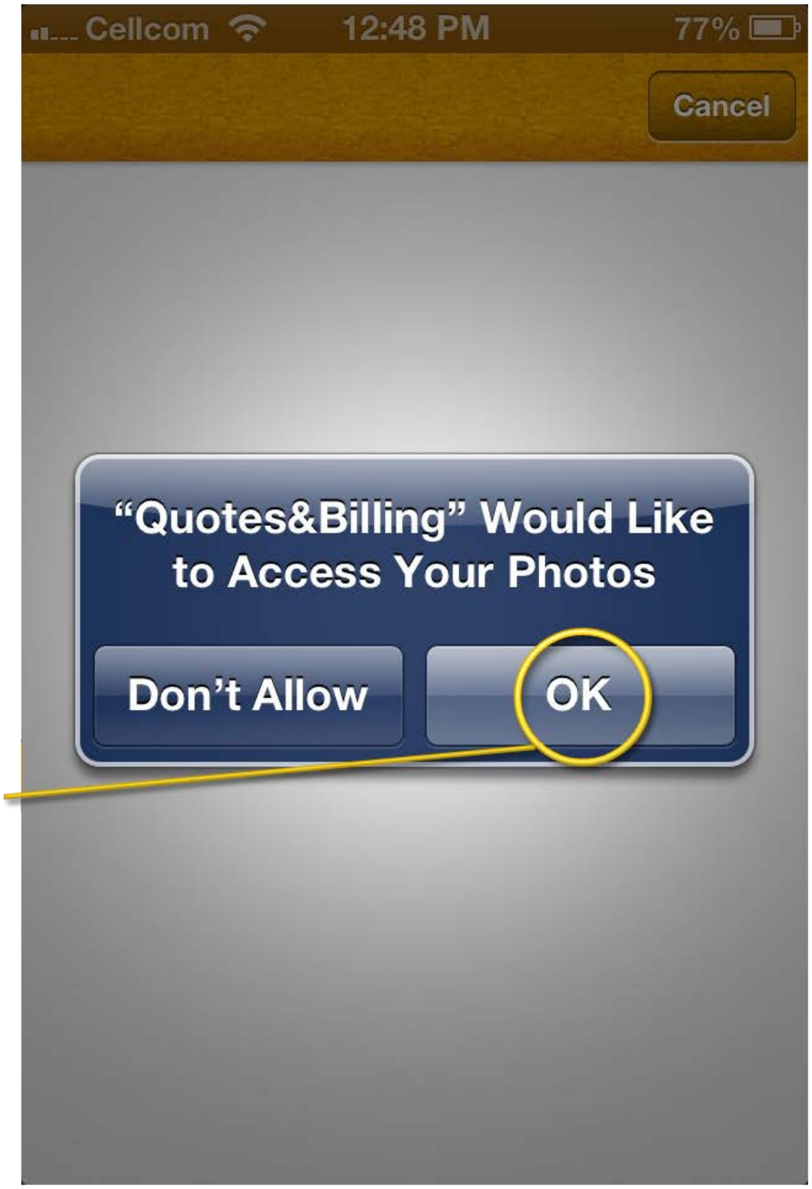
STEP3: Enter the basic information on your company.



STEP 3: Enter your **TAX TYPE** (e.g. Sales Tax, V.A.T.) and enter the **TAX RATE**.
(NOTE: If there is tax on shipping, then switch the "**SHIPPING ON TAXABLE"** to "**YES**").

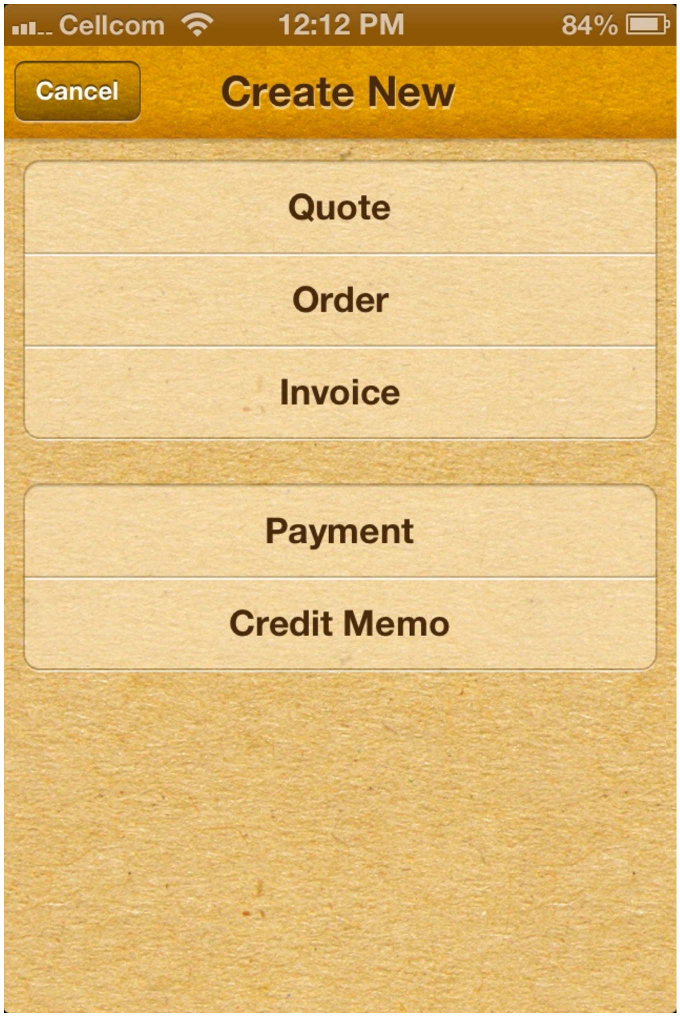
STEP 4: Enter the starting number for your **QUOTES, ORDERS and INVOICES**..

FOLLOW
THE
PROMPTS
TO
ADD
YOUR
COMPANY
LOGO
TO
Q & B
FORMS



STEP 5 (OPTIONAL): Enter your company logo by selecting that section.
The program will then direct you to your photo library to select your logo image. The first time you use the program you need to give **Quotes & Billing** permission to use your photo library.

CREATE NEW… ALL of the Main activities of the program can also be accessed from the program's **Main Screen**
Here is an itemized menu from which you can select the activity you want to implement:

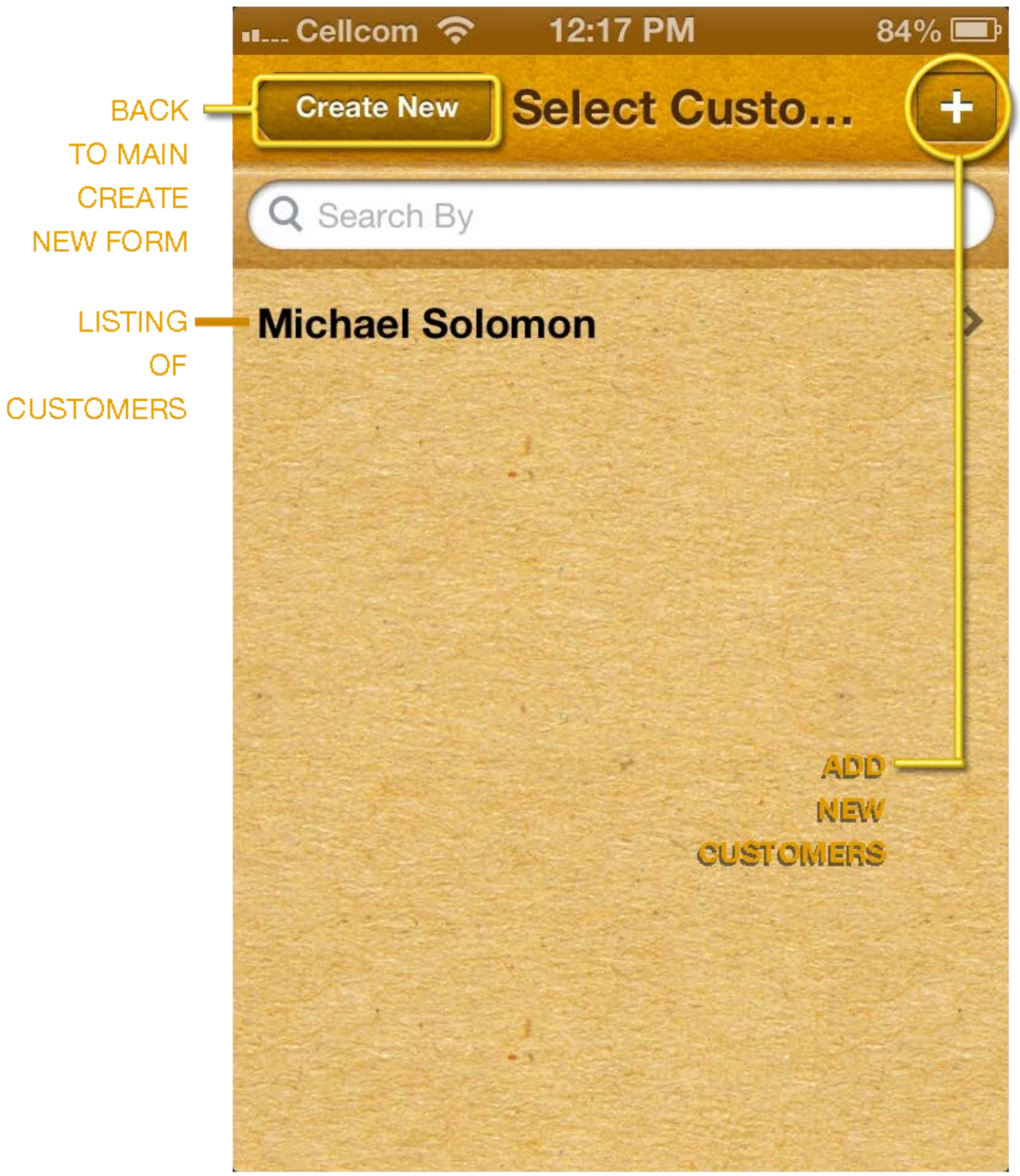


Choose whether you want to:

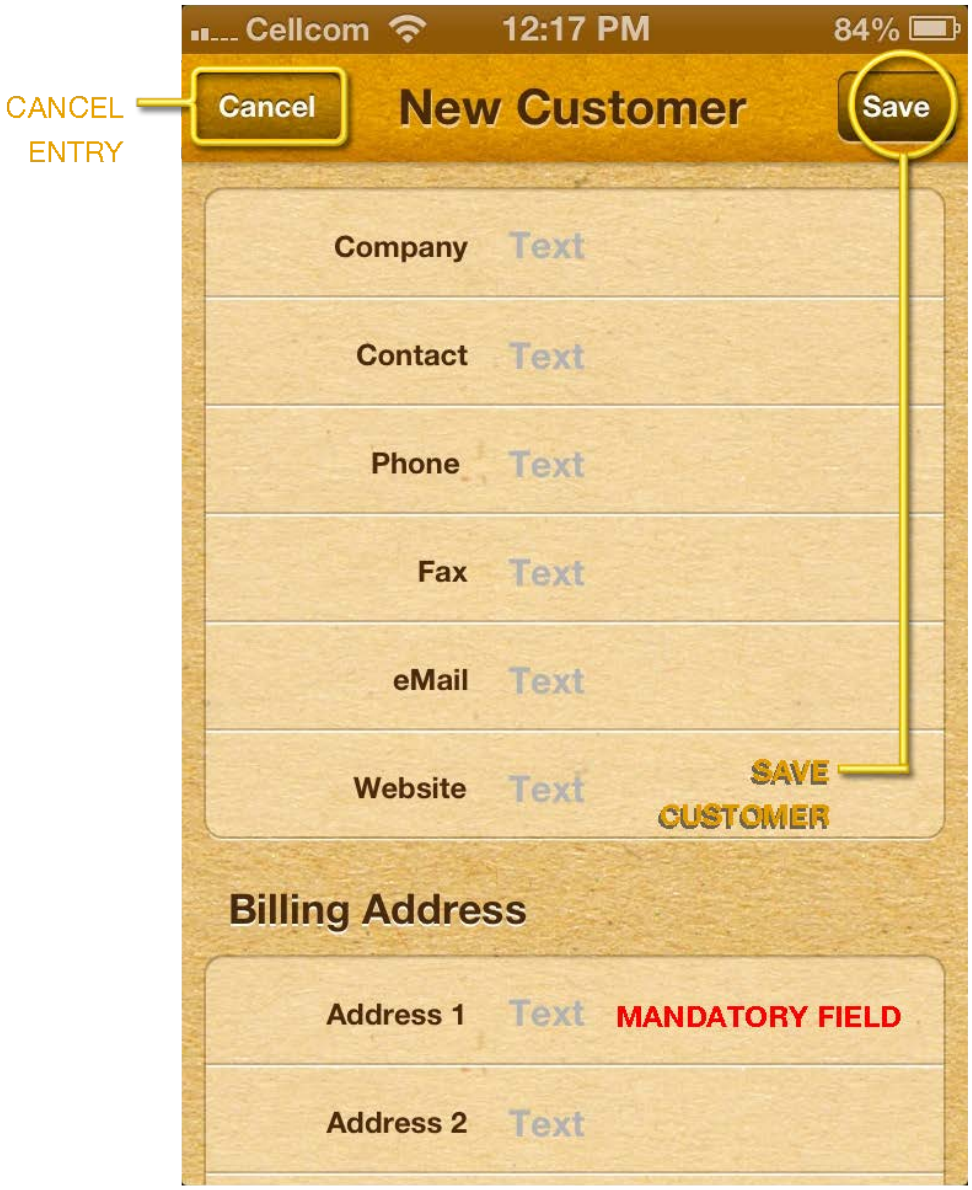
Issue a new **price quote**
Create a new **order**
Begin a new **invoice.**
Accept a **payment**
Issue a **credit memo.**

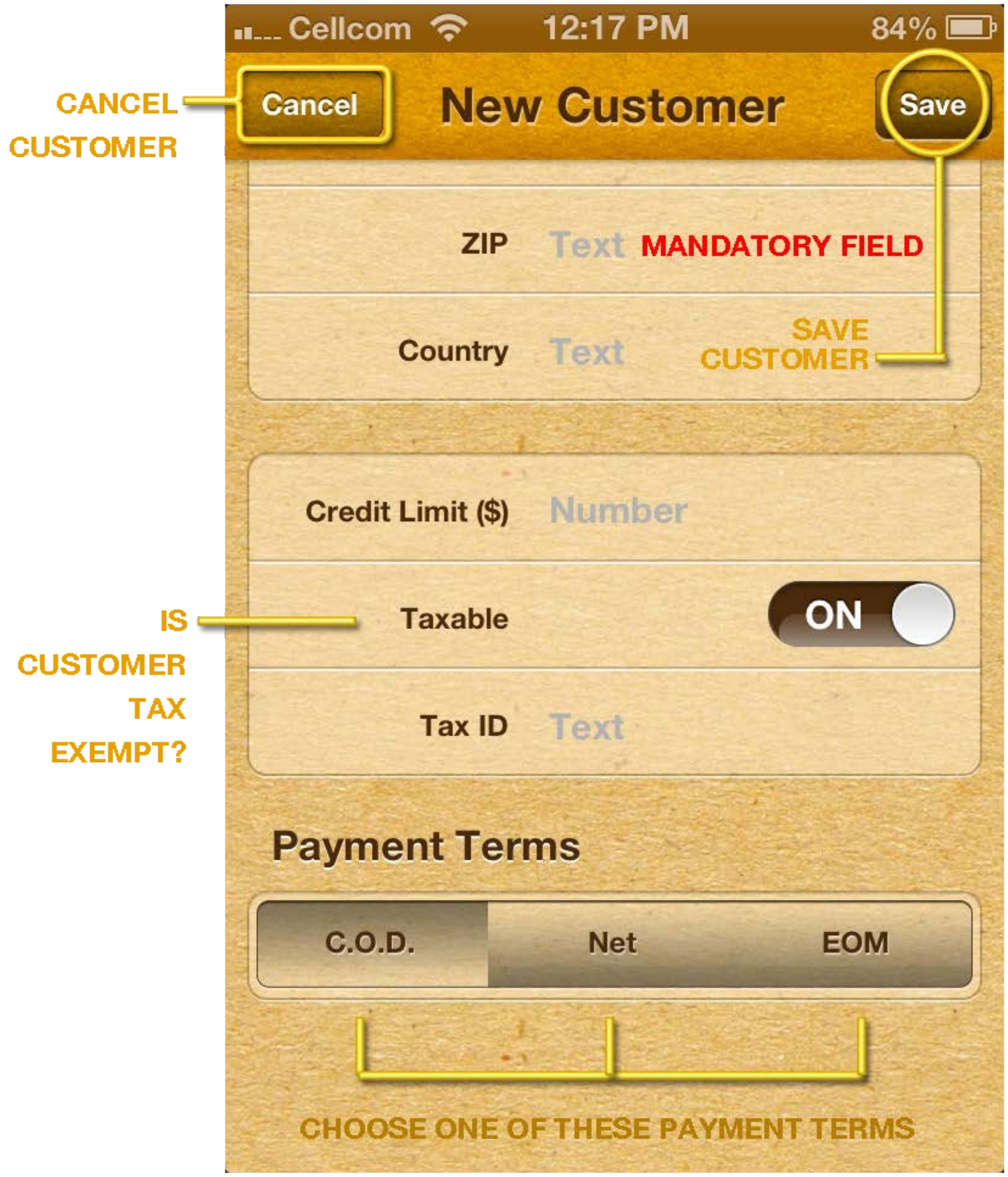
NEXT

Choose an existing customer or add a new customer.



You can add separate billing and shipping addresses.
NOTE: Billing address fields are mandatory.

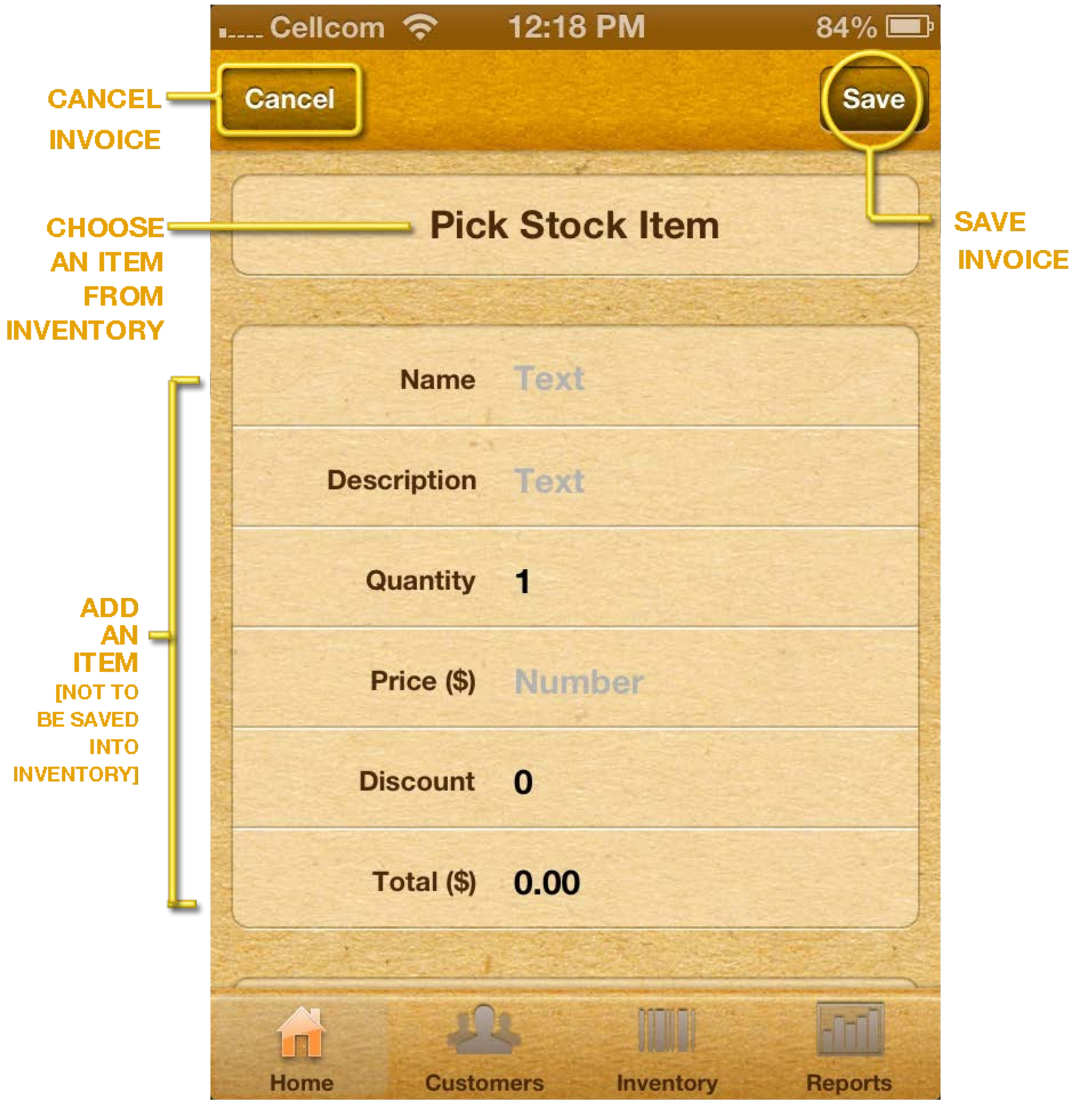




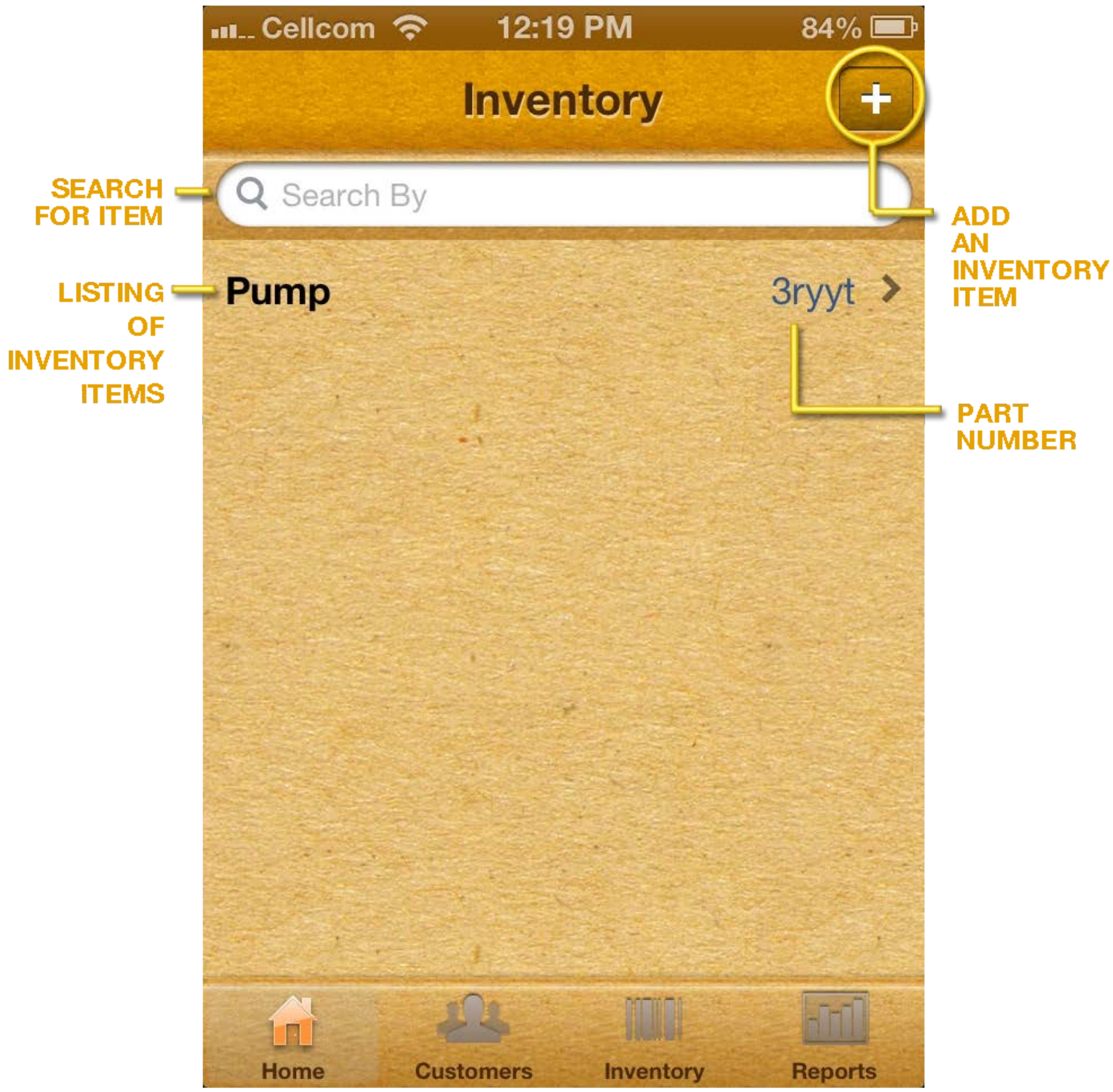
When you add new customers, you need to set up their terms of payment.
Either **C.O.D.** | **NET** | or **E.O.M.** (i.e. Endo of Month.)
If you choose **NET**, the program will open an option for you to enter the due days and discount days.

INVOICING

After **creating a customer**, you will come to the **INVOICE screen**.
There you have a choice of picking a stock item or adding a temporary item.
This can be a service item (hourly items),
or any other item(s) of which you do not want/need to keep track.



If the item you want to ADD is not currently in your inventory,
then select the **(+) BUTTON** to add a new inventory item.



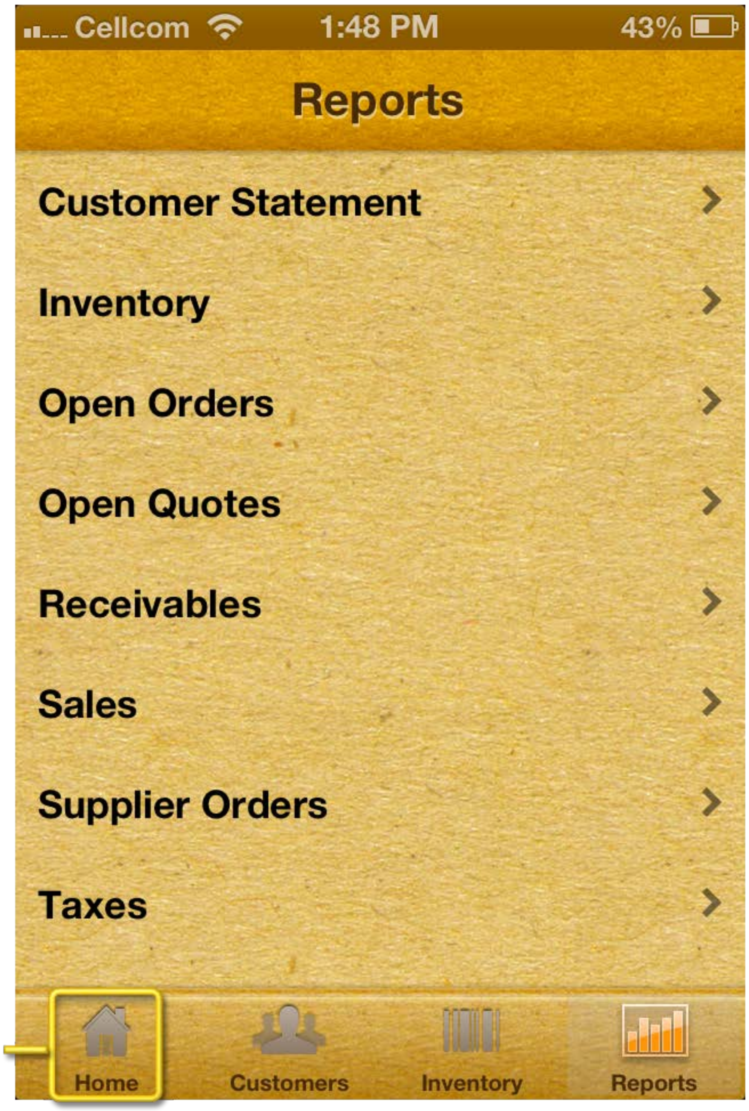
When you enter information on an item,
the **Item name** and **Part number** are mandatory.
If you do not make up part numbers, then select a Part Number.
Quantity: Displays the quantity of an item in stock.
Ordered items: Itemizes the number of an item on an order.
Reorder Quantity: Highlights the level at which you set to reorder an item.
Cost: Catalogues your cost for each item.
List price: Specifies the manufacturers suggested retail price of an item.
Sales price: Indicates the price at which you sell the item.
Taxable: stipulates whether or not the item is taxable when you sell it.

The program also keeps track of: height, width, length, and weight of items.

Once you enter the line items on the invoice, you have the opportunity to go into invoice **summary section** and insert the amount of the shipping and taxes.

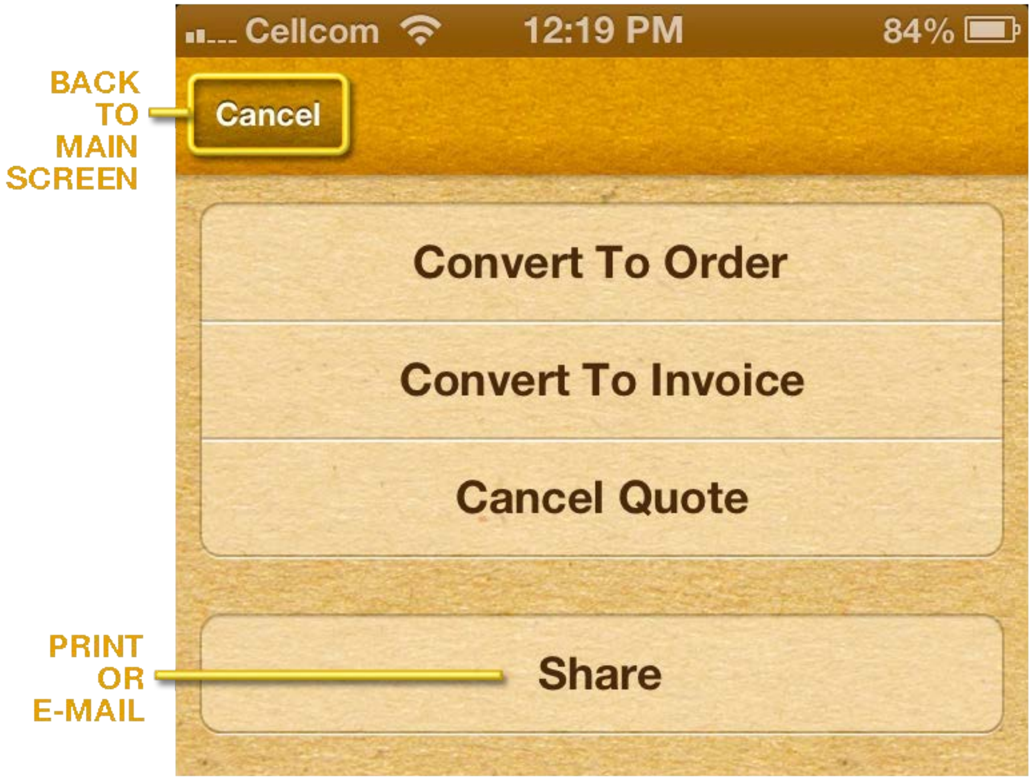
REPORTS

A key function of the QUOTES & BILLING App is the program's ability to convert an existing quote into an order and/or invoice.

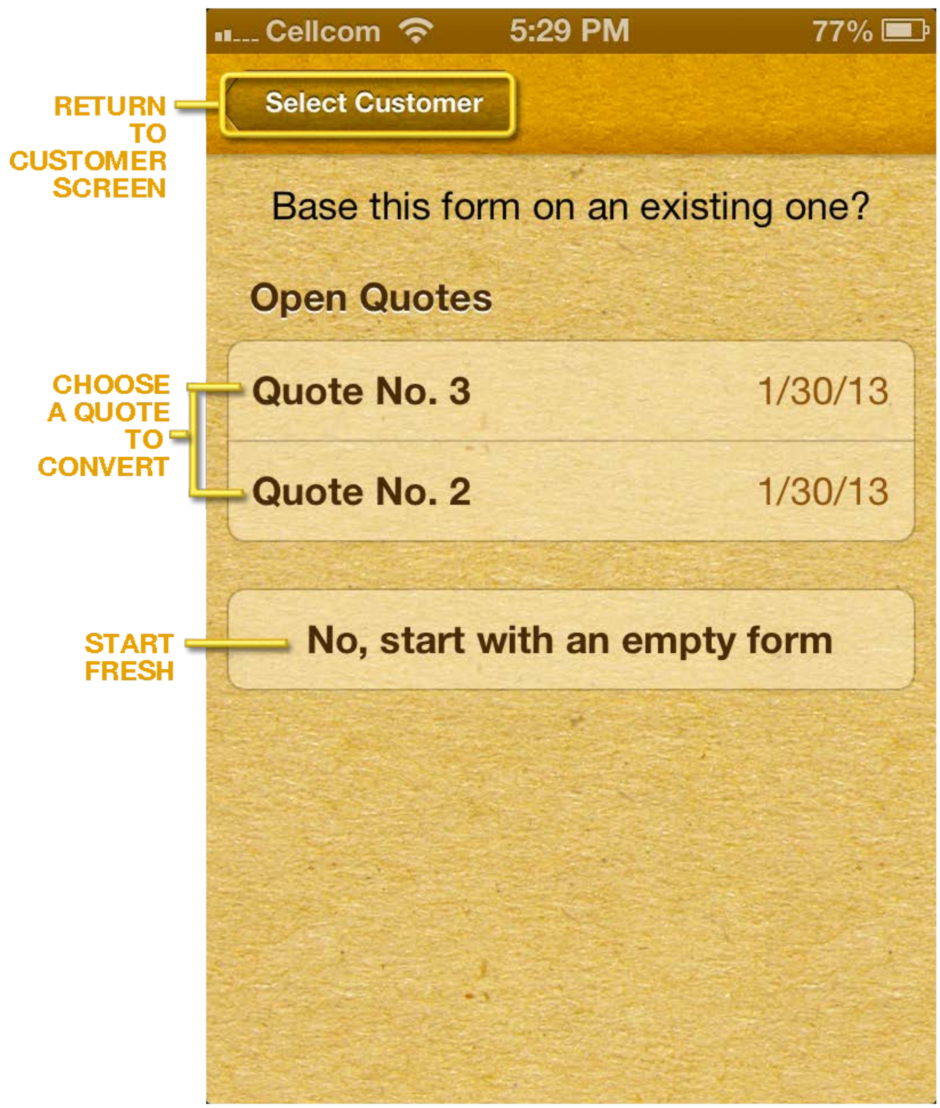


CANCEL AND RETURN TO MAIN SCREEN

Any invoice can be converted directly into an invoice.



Select a Customer. The QUOTES & BILLING app will then display the **open quote/s attributed to that customer.**



When you enter into an invoice you can select the **SHARE** button.
Here, you will have a number of options:
You can void the invoice, receive a payment, or issue a credit memo.

Another option: select share. Once you select the **SHARE** option
you will see the following screen:

If you select receive payment the program creates a receipt form.
Enter the amount received there.
You also need to choose the **payment method** and
add a comment (if you wish).