

F-Billing Revolution 2015 User Manual

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1 Introduction

F-Billing Revolution 2015

Fast & Enjoyable Billing software for Windows

F-Billing Revolution 2015 is one of the fastest invoicing software solutions available for download.

It won't just help you edit professional invoices but will also e-mail them instantly to your clients as PDF's.



Happy Invoicing!

F-BILLING Soft

2 Quick Start Guide

1. At main menu click on **Settings tab >> Company settings**

2. **Setup your company name, address, tax names and rates, currency and date format**

3. **(optional)** Browse to your company logo file. (BMP, JPG or PNG image files accepted)

Some experience of course will be needed to get a good looking result.

Just make the "Print logo picture" unchecked if you don't want to print logo pictures on invoices estimates and orders.

4. When you have finished making the changes, click on **Save settings** toolbar button

5. Now click to the **Invoices tab >> Create new invoice** where you can start creating your first invoice.

Company settings

Company name: your company name or personal name

Company address: your company address, tel, fax or web address goes here

Company address: your company email address goes here

Sales tax reg. no. (optional): sales tax registration number or any other identifier

Currency group-box: select or enter your currency, select or enter the currency sign and select the decimal separator.

Click on "SET CURRENCY" button to apply the settings

Date format: select your date format from drop-down list

yyyy - year value 4 digits
mm - month value 2 digits
dd - day value 2 digits

Tax1 name and rate: default tax1 name and rate (for example: TAX1,VAT,GST ,PST)

Tax2 name and rate: default tax2 name and rate (TAX2,VAT,GST ,PST)

Company logo: company logo image (appears on invoices, estimates and orders) .
Print logo image: Make unchecked if you don't want to print company logo. (BMP,JPG or PNG image files accepted)

When you've finished editing the fields, click on "Save settings" toolbar button.

3 Invoice Email Settings

F-billing Revolution 2015 has a built-in email module and supports emailing invoices internally.

It will not open and use any external software like Outlook Express or Windows Mail or Mozilla Thunderbird when emailing.

Only the connection information needed to your SMTP (outgoing mail) server.

If you have a working e-mail client software (Outlook express, Windows Mail, Mozilla Thunderbird) f-billing needs the same SMTP settings or configuration for sending mail as your e-mail client on your computer or you can ask your ISP (Internet Service Provider) for your SMTP settings.

Please note, any email service that requires a web browser to send emails won't work with f-billing. (Except the Google Mail)

If you haven't got any SMTP settings:

- create a free [Google Mail](#) account (GMail comes with SMTP server)
- or choose one of the following emailing services: ([MailGun](#), or [Mandrill](#)) Just sign-up and find your SMTP (outgoing mail server) settings under your account. Our software tested and works well with GMail, MailGun or Mandrill SMTP servers.

Invoice Email Settings:

First you need to **select an existing invoice** after click on Email Invoice button to **open the email window.**

Click on the Account tab under Invoice email window

Your company email address: company or personal email address goes here (sender email address)

Your name or business name: company name or your name (sender name)

Reply to email address: You can make your reply-to address different from your sending address, leave blank if same as sender address

Signature: Create an email signature text that appears at the end of your email messages automatically

Confirmation reading: A read receipt email informs you that your message has been opened. However, do not rely solely on these receipts because the message recipient has the option to decline to send read receipts

Hostname: your SMTP server hostname (get this info from your email client or ask your ISP)

Port: default value 25, (if secure connection SSL checkbox is checked the port number needs to be 587 or 465)

Username/ Password: typically the username is your email address (try filling in the username/password from your ISP)
The password is case sensitive, make sure you match the case when typing in your password.

Secure connection (SSL): Email encryption, some SMTP server requires a secure connection.

Make it checked if you get email errors. If checked the port number needs to be 587 or 465 (in most cases)

When you've entered all necessary information, click on "Save Settings" button to save changes

If you haven't got SMTP server then signup for ([GMail](#), [MailGun](#) or [Mandrill](#)) and you can use the corresponding SMTP Connection example:

for Google Mail (GMail):

Hostname: smtp.gmail.com

Username: your gmail email address

Password: your gmail email password (Case sensitive!)

Port: 587

SSL connection: make it checked

Company email address: your gmail email address (must be the same as the username!)

for MailGun: (login to your MailGun account and click on "Domains" tab to get your SMTP credentials)

Hostname: smtp.mailgun.org

Username: your Mailgun SMTP username

Password: your Mailgun SMTP password (Case sensitive!)

Port: 587 or 465 (Both are SSL port and both work)

SSL connection: make it checked

for Mandrill: (login to your Mandrill account to get your outgoing email credentials)

Hostname: smtp.mandrillapp.com

Username: your mandrill email address

Password: your mandrill api key (Case sensitive!)

Port: 587

SSL connection: make it checked

4 Invoices

At main window click on **Invoices tab**

This is the default tab after starting the billing software.

Under the invoices tab you can **manage your invoices database** for the current company account.

(note: You can create unlimited company accounts. Each company account has a separated invoices database.)

The screenshot shows the 'Invoices' tab in a software application. The interface includes a menu bar at the top with options like Invoices, Orders, Estimates, Recurring, Customers, Products/Services, Reports, and Settings. Below the menu is a toolbar with icons for 'Create new Invoice', 'View/Edit Invoice', 'Delete Selected', 'Print Preview', 'Print Selected', 'E-mail Invoice', 'Search in Invoices', 'Invoice date from: 01-01-2015', 'Invoice date to: 02-10-2015', 'Apply filter', and 'Refresh Invoices list'.

The main area displays a table titled 'Invoices (All)' with columns: Invoice #, Invoice date, Due date, Customer Name, Status, Emailed on, Printed on, Invoice Total, Total Paid, and Balance. The table contains several rows of invoice data. Annotations with red arrows point to various features: 'Click here to select / unselect all' points to the 'Invoice #' column header; 'Click on column header to sort list ascending or descending' points to the 'Customer Name' column header; 'Click here to apply the date range filter for the invoice list' points to the 'Apply filter' button; 'Make checkboxes checked to select multiple invoices for print or delete.' points to the checkboxes in the 'Invoice #' column; 'Click on a tab label to view the details for the highlighted invoice.' points to the 'Invoice Items' tab label; and 'To move the splitter bar, press and hold the left mouse button down.' points to the splitter bar between the 'Invoices' and 'Invoice Items' sections.

Below the 'Invoices' table is the 'Invoice Items' section, which has tabs for 'Invoice Items', 'Payments', and 'Invoice Private Notes'. It displays a table with columns: Product/Service ID, Name, Description, Price, QTY, Tax 1, and Line Total. The table contains three rows of item data.

The following options available

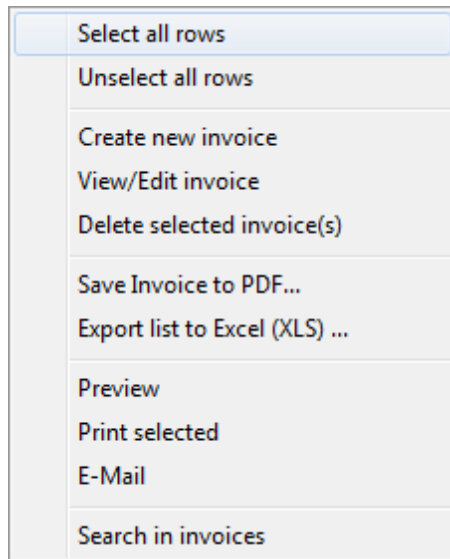
- [Create new invoice](#)
- Selecting invoice(s)
- [Editing existing invoice](#)
- Deleting invoice(s)
- Search in invoices list
- Filtering invoices by date range
- Printing invoices
- [Emailing invoices](#)

Selecting invoices

- If you would like to edit, view or delete an invoice then first you need to select by clicking on a datagrid row.
- Double click on the listing to open the invoice detail window

- Make the checkbox(es) checked near the "Invoice#" column to select multiple invoices. (usable for printing and deleting)

Right click on the invoices datagrid to open the popup menu:



Deleting invoices

- If you would like to delete only one invoice just select (highlight) and click on delete button.
- To delete multiple invoices select multiple rows by setting checked the checkboxes at left side. After click on delete button.

Sorting invoices list:

1. Click a column heading to sort by it.
2. The heading of the sort column contains an arrow whose direction indicates the sort order, up for ascending (0-9, A-Z) and down for descending (Z-A, 9-0).
3. To switch between descending and ascending sort order, click the column heading.

Filtering invoices by date range

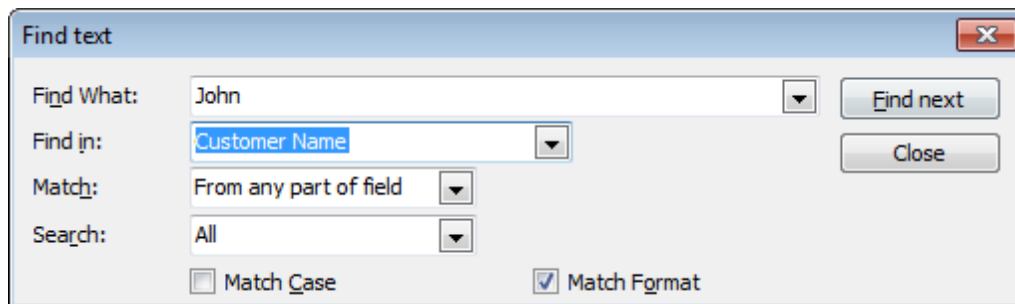
You can group your customers into categories. Click on a category row in category list to filter the listing by selected category.

Search in invoices

If you have hundreds or thousands of invoices use the search pop-up window to find an invoice by keyword.

Click the Search button to perform the search.

Search window

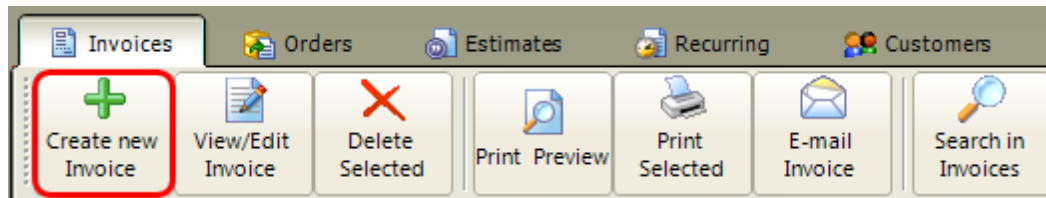


The screenshot shows a 'Find text' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Find What:** A text input field containing 'John' and a dropdown arrow on the right.
- Find in:** A dropdown menu currently showing 'Customer Name' with a dropdown arrow on the right.
- Match:** A dropdown menu showing 'From any part of field' with a dropdown arrow on the right.
- Search:** A dropdown menu showing 'All' with a dropdown arrow on the right.
- Match Case:** An unchecked checkbox.
- Match Format:** A checked checkbox.
- Buttons:** 'Find next' and 'Close' buttons are located on the right side of the dialog.

4.1 Creating an Invoice

At main window click on **Invoices tab >> Create new Invoice**

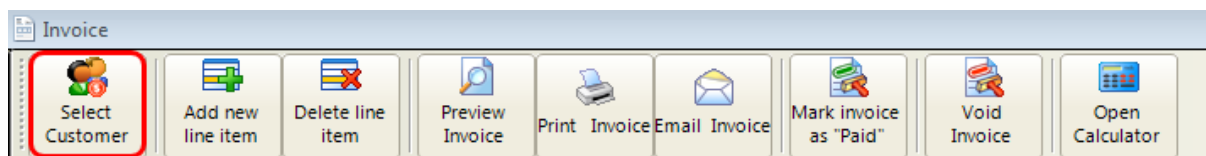


This will open the new Invoice window

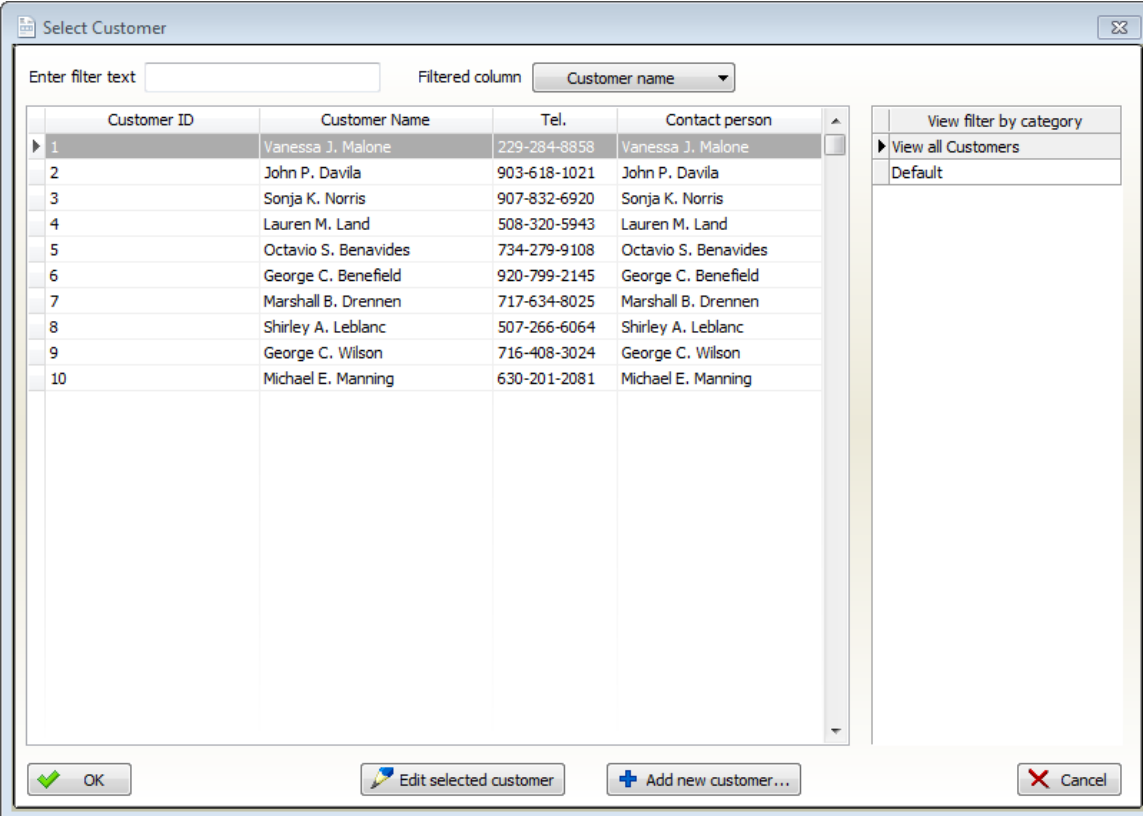
 A screenshot of the 'Invoice' window. The window has a toolbar at the top with buttons like 'Select Customer', 'Add new line item', 'Delete line item', 'Preview Invoice', 'Print Invoice', 'Email Invoice', 'Mark invoice as "Paid"', 'Void Invoice', and 'Open Calculator'. Below the toolbar, there are input fields for 'Customer' (Invoice to, Address, Email) and 'Ship to' (Address, Phone). To the right, there are fields for 'Invoice #' (INV0000013/2015), 'Invoice date' (02-11-2015), 'Due date' (02-11-2015), 'Terms', and 'Order ref. #'. A table with columns 'ID/SKU', 'Product/Service', 'Description', 'Unit Price', 'Quantity', 'Pcs/Weight', 'Tax1', and 'Price' is shown, with a message: '< 1. Select customer first. 2. Click on "Add new line item" toolbar button to add a new row... >'. At the bottom, there are tabs for 'Invoice', 'Recurring', 'Payments', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Invoice' tab is active, showing fields for 'Extra cost name', 'Discount rate' (0), 'Sales Person', 'Template' (Professional 1 (logo on left side, UTF8)), 'TAX1' (6.5), 'Status' (Draft), 'Emailed on:' (Never), and 'Printed on:' (Never). A 'Summary' table is on the right:

Summary	
Discount	\$0.00
Subtotal	\$0.00
Tax1	\$0.00
Extra cost	\$0.00
Invoice total	\$0.00
Total Paid	\$0.00
Balance	\$0.00

1. First you need to select the customer for the new invoice, click on **Select Customer button**



This will open the **select customer window**



The "Select Customer" dialog box features a search bar at the top with the label "Enter filter text" and a dropdown menu for "Filtered column" currently set to "Customer name". Below this is a table with four columns: "Customer ID", "Customer Name", "Tel.", and "Contact person". The table lists 10 customers, with the first row highlighted. To the right of the table is a "View filter by category" section with a dropdown menu showing "View all Customers" and "Default". At the bottom of the dialog are four buttons: "OK" (with a green checkmark), "Edit selected customer" (with a pencil icon), "Add new customer..." (with a plus icon), and "Cancel" (with a red X icon).

Customer ID	Customer Name	Tel.	Contact person
1	Vanessa J. Malone	229-284-8858	Vanessa J. Malone
2	John P. Davila	903-618-1021	John P. Davila
3	Sonja K. Norris	907-832-6920	Sonja K. Norris
4	Lauren M. Land	508-320-5943	Lauren M. Land
5	Octavio S. Benavides	734-279-9108	Octavio S. Benavides
6	George C. Benefield	920-799-2145	George C. Benefield
7	Marshall B. Drennen	717-634-8025	Marshall B. Drennen
8	Shirley A. Leblanc	507-266-6064	Shirley A. Leblanc
9	George C. Wilson	716-408-3024	George C. Wilson
10	Michael E. Manning	630-201-2081	Michael E. Manning

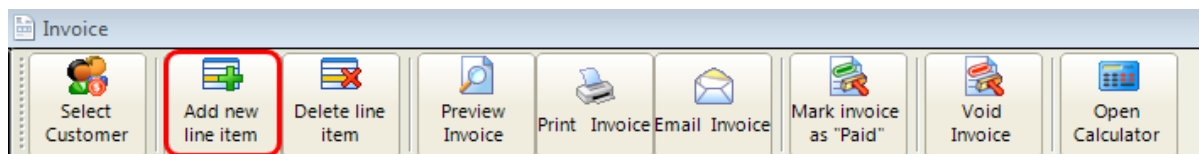
Select a customer or add a new customer.

If you have a lot of customers you can filter the list by

- clicking on a category line
- typing the first 1-3 letters of the customer name to the filter text field.

After click on **OK**

2. Add lines items for the invoice. Click on **Add new line item** button



The "Invoice" toolbar contains nine buttons. The "Add new line item" button, which features a green plus sign icon, is highlighted with a red rectangular box. The other buttons are "Select Customer", "Delete line item", "Preview Invoice", "Print Invoice", "Email Invoice", "Mark invoice as 'Paid'", "Void Invoice", and "Open Calculator".

This will open the **Product/Services Window**

Products/Services

Enter filter text Filtered column **Product/Service Name** ☐ Show products out of stock

ID/SKU	Product/Service Name	Unit Price	Service	Stock
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z9	\$119.99	<input type="checkbox"/>	18
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel E	\$53.00	<input type="checkbox"/>	10
ASUS M5A99FX PRO	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + S	\$129.00	<input type="checkbox"/>	13
Intel Core i5-4430	Intel Core i5-4430 Haswell Quad-Core 3.0GHz L	\$184.00	<input type="checkbox"/>	8
AMD A10-6800K	AMD A10-6800K Richland 4.1GHz	\$119.00	<input type="checkbox"/>	4
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4GHz L	\$309.99	<input type="checkbox"/>	1
AMD A8-5600K	AMD A8-5600K Trinity Quad-Core 3.6GHz	\$83.00	<input type="checkbox"/>	11
8GB(2x4) DDR3 Lapt	8GB(2x4GB) 204 pins DDR3-1600	\$67.00	<input type="checkbox"/>	32
16GB(2x8) DDR3-Des	HyperX Fury Series 16GB (2 x 8GB)	\$139.00	<input type="checkbox"/>	21
ASUS VN248H-P	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG	\$169.00	<input type="checkbox"/>	6
Dell E1914H	Dell E1914H Black 18.5" 5ms Widescreen LED Ba	\$94.00	<input type="checkbox"/>	1
ASUS ROG PG278Q	ASUS ROG PG278Q Black 27" 1ms(GTG) Widescr	\$799.00	<input type="checkbox"/>	3
MSI R9	MSI R9 270X GAMING 2G Radeon R9 270X 2GB :	\$169.00	<input type="checkbox"/>	5
ASUS MATRIX-GTX98	ASUS MATRIX-GTX980-P-4GD5 GeForce GTX 980	\$649.00	<input type="checkbox"/>	1
SERV03	PC Vulnerability checking	\$10.00	<input checked="" type="checkbox"/>	
SERV02	Web hosting Service "BASIC" Plan	\$9.95	<input checked="" type="checkbox"/>	
SERV01	Software maintenance	\$45.00	<input checked="" type="checkbox"/>	0

17 Line(s)

View filter by category

- View all products/services
- View all products
- View all services
- Computer Maintenance
- LCD Monitor
- LED Monitor
- Motherboards
- Processors-Desktop
- RAM Memory-Desktop
- RAM Memory-Laptop
- Video Cards

OK Edit selected Product/Service Add new Product/Service Cancel

Select a product or add a new product.

If you have a lot of products you can filter the list by

- clicking on a category line
- typing the first 1-3 letters of the product name to the filter text field.

After click on **OK**

3. Set up additional settings:

Invoice tab

Invoice Recurring Payments Header/Footer Comments Terms Private notes

Extra cost name Discount rate

Extra cost

Sales Person TAX1

Template

Status: Draft

Emailed on: Never

Printed on: Never

Extra cost name: enter extra cost name here (p.e. shipping, handling, postage etc.) or select from the predefined text (appears on printed invoices)

Extra cost: the extra cost value (no tax calculated on this value)

Sales person: by default the logged in username here. Under reports menu you can create sales

reports by sales person

Template: This is the [template](#) that will be used to generate the print version of the invoice. Use the preview button to check the invoice before print.

Discount rate: overall discount rate for the invoice (the discount rate will be applied on the invoice subtotal)

Tax1 rate, Tax2 rate: The tax rate for this invoice. The default value is comes from the customer record if present and system settings if not. if the customer record marked as 'TAX Exempted' then no tax will be calculated on the invoice

Recurring tab

The screenshot shows the 'Recurring' tab selected in a software interface. The tab bar includes 'Invoice', 'Recurring', 'Payments', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Recurring' section contains a checkbox labeled 'Recurring'. Below it, there are fields for 'Recurring period (interval)' with a value of '1' and a dropdown set to 'Month(s)'. The 'Next Invoice' field shows '03-11-2015' with a 'Recalculate' button next to it. At the bottom, there is a checkbox for 'Stop recurring after' with a date field set to '02-11-2015'.

Recurring: make it checked if you would like to automatically create invoices at given date intervals

Recurring period: enter the interval (p.e. 14 day, 1 month, 3 month(s), etc.)

Next invoice: This is the date when the next recurring invoice will be generated.

Stop recurring after: Make it checked, if you would like to specify the date to stop recurring the invoice.

Recalculate: create or regenerate the next invoice date based on recurring period

Payments tab

The screenshot shows the 'Payments' tab selected in the software interface. The tab bar is the same as the previous one. The 'Payments' section features a table with columns: 'Payment ID', 'Payment date', 'Paid by', 'Description', and 'Amount'. The table is currently empty, and a message box states 'There are no payments recorded for this invoice yet.' Below the table, there is a 'Line(s)' field and a total amount of '\$0.00'.

Under this tab you can record payments for the invoice. Also you can send payment receipt email. For more info see the Payments section

Header/Footer tab

The screenshot shows the 'Header/Footer' tab selected in a menu bar. Below the menu bar, there are three text input fields, each with a dropdown arrow on the right:

- Title text
- Page header text
- Footer text

Title text: Invoice title goes here, appears on invoice only once. You can choose from the predefined list of header lines

Page header text: Page header goes here, (if multiple pages then appears on all invoice pages), You can choose from the predefined list of header lines

Page footer text: Page footer goes here, (if multiple pages then appears on all invoice pages), You can choose from the predefined list of footer lines

Comments tab

The screenshot shows the 'Comments' tab selected in a menu bar. Below the menu bar, there is a large, empty text area with a vertical scrollbar on the right side.

Comments: comments text goes here appears on printed invoices

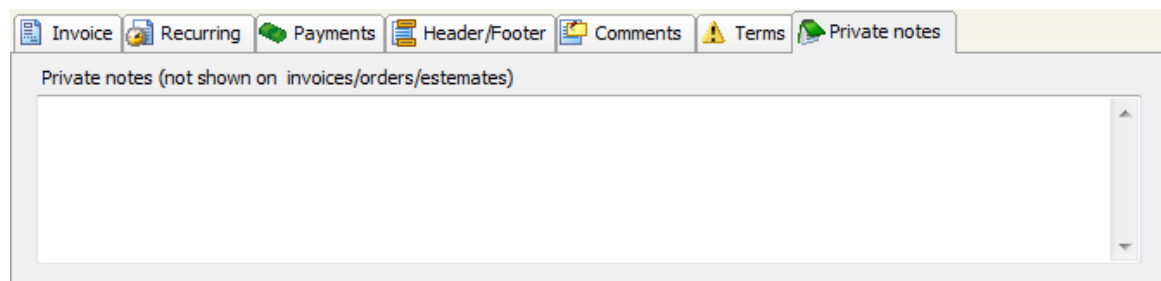
Terms tab

The screenshot shows the 'Terms' tab selected in a menu bar. Below the menu bar, there is a text area containing the following text:

Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.

The default terms and conditions text for the new invoice. Appears on printed invoice

Private notes tab

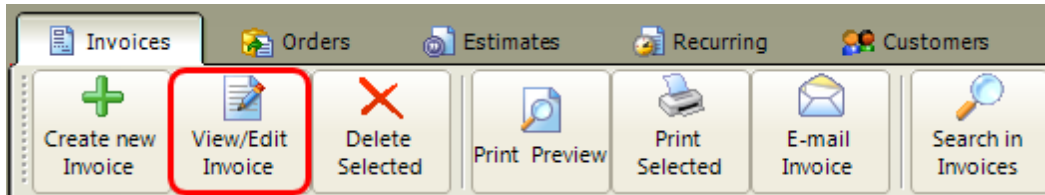


The screenshot shows a software interface with a horizontal tab bar at the top. The tabs are labeled: 'Invoice', 'Recurring', 'Payments', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Private notes' tab is currently selected and highlighted. Below the tab bar, the main area is titled 'Private notes (not shown on invoices/orders/estimates)' and contains a large, empty text box with a vertical scrollbar on the right side.

Private notes: any notes text for the invoice, not appears on printed invoices

4.2 Editing an Invoice

1. At main menu click on **Invoices tab**
2. **Click on the invoice line** to select it
3. Click on **Edit/View Invoice button** or double click on the invoice line to edit



This will open the Invoice window

The Invoice window displays the following information:

Customer (ID: 10): Michael E. Manning
 Address: 3240 Walkers Ridge Way, Buffalo Grove, IL 60089
 Email: MichaelEManning@armyspy.com
 Phone: 630-201-2081

Invoice to: Michael E. Manning
Ship to: Michael E. Manning
 Address: 3240 Walkers Ridge Way, Buffalo Grove, IL 60089

Invoice Details:
 Invoice #: INV0000004/2015
 Invoice date: 02-08-2015
 Due date: 02-15-2015
 Terms: NET 07
 Order ref. #:

ID/SKU	Product/Service	Description	Unit Price	Quantity	Pcs/Weight	Tax1	Price
GB-GA-297X	GIGABYTE GA-297X-Gaming 5 LGA 1150 In	Intel 297, Core i7 / i5 / i3 / Pentium / Celeron ()	\$119.99	1		<input checked="" type="checkbox"/>	\$119.99
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4K		\$309.99	1		<input checked="" type="checkbox"/>	\$309.99
16GB(2x8) DDR3-Desk.	HyperX Fury Series 16GB (2 x 8GB)	240-Pin DDR3 SDRAM DDR3	\$139.00	1		<input checked="" type="checkbox"/>	\$139.00

3 Line(s) \$568.98

Extra cost name: Shipping and handling
Extra cost: \$10.00
Sales Person:
Template: Business Classic (UTF-8)

Discount rate: 0
TAX1: 6.5

Status: Past Due
Emailed on: Never
Printed on: 02-11-2015

Summary:
 Discount: \$0.00
 Subtotal: \$568.98
 Tax 1: \$36.98
 Shipping and handling: \$10.00
 Invoice total: \$615.96
 Total Paid: \$0.00
 Balance: \$615.96

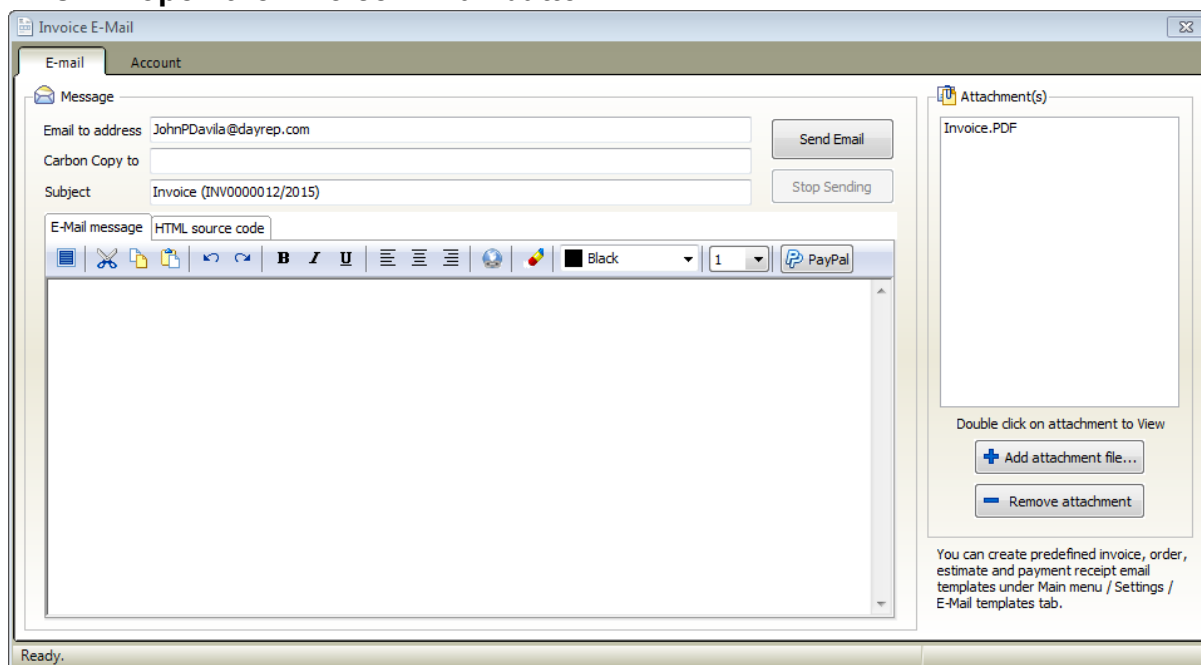
When you've finished editing the fields, just close the window. Your changes will be saved automatically .

4.3 Emailing an Invoice

Click on the **Email Invoice** toolbar button



This will open the Invoice E-mail button



The first thing you'll need to do is: [set up your email account](#). Without this you cannot send email messages.

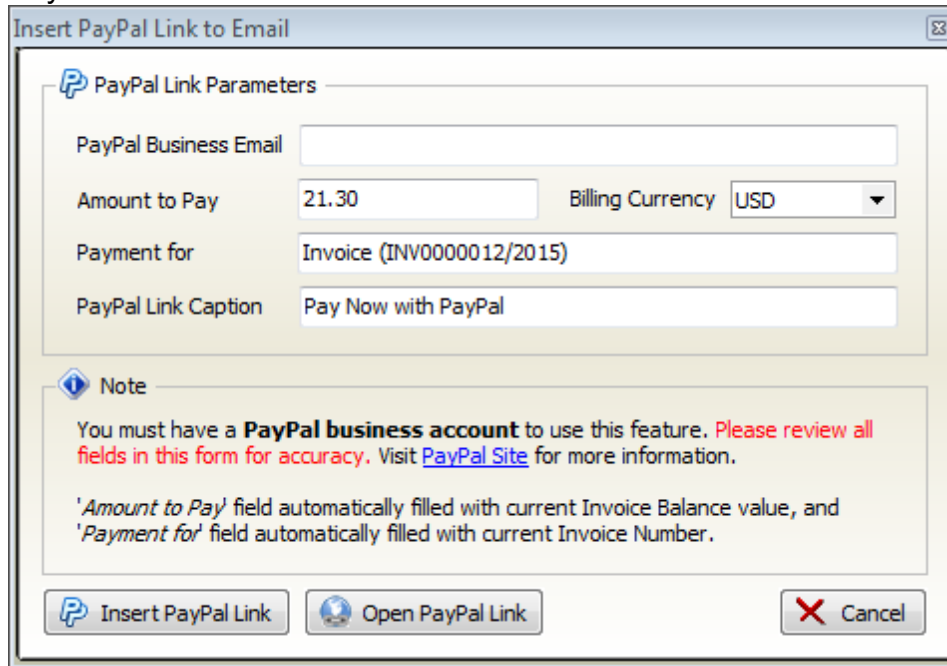
The current invoice will be automatically attached to the email message. You can attach other files to the message just click on "Add attachment file..." button.

Make sure the "Email to address" field contains a valid email address

Email message body: enter the message body text here [You can create predefined invoice email template under the "Settings" menu tab](#). The email message body will be automatically filled with the template text. Placeholders in the template text will be automatically replaced with the current invoice values.

When you've finished editing the fields, click on "Send email" button to send the message.

(optional) You can attach PayPal payment link to your invoice email, Just click on PayPal toolbar button



PayPal business account: your PayPal business account email address goes here. You must have a [PayPal](#) business account to use this feature.

Amount to Pay: You can enter amount to pay to this field. By default this field will be automatically filled with the current invoice balance.

Billing currency: Select your currency from the list. (PayPal accepts only the listed currencies)

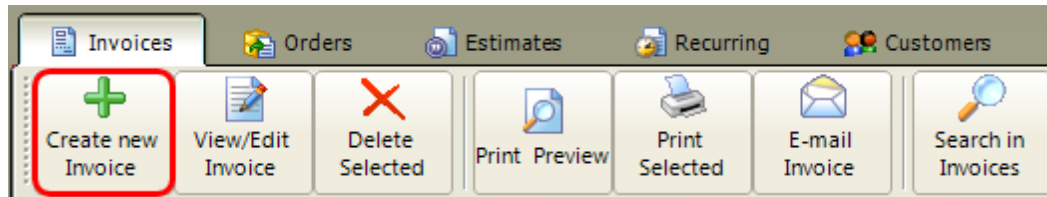
Click on **Open PayPal link to test** your payment link

Click on **Insert PayPal link** to place the PayPal payment link into the email message. Your customer can pay for your invoice by clicking on the PayPal link. Also you can insert PayPal payment button into invoice to get paid faster.

4.4 Recurring Invoices

F-Billing Revolution supports recurring invoicing. This is useful if your business needs to send invoices on a repeat basis. You can specify a schedule for a recurring invoice and F-Billing Revolution automatically generates invoices based on this schedule.

1. Create a standard invoice first



2. Select customer, and line items for the invoice

3. Click on Recurring tab under the invoice window and make the Recurring checkbox checked

4. To setup a schedule for the recurring invoice you need to enter the interval and make sure the next invoice date value is correct

5. Close the invoice to save

Recurring tab

A screenshot of the 'Recurring' tab in the F-Billing Revolution software interface. The tab is selected, and the 'Recurring' checkbox is checked. Below the checkbox, there are fields for 'Recurring period (interval)' (set to 1) and 'Month(s)' (set to Month(s)). There is also a 'Next Invoice' date field (set to 03-11-2015) and a 'Recalculate' button. At the bottom, there is a 'Stop recurring after' checkbox (unchecked) and a date field (set to 02-11-2015).

Recurring: make it checked if you would like to automatically create invoices at given date intervals

Recurring period: enter the interval (p.e. 14 day, 1 month, 3 month(s), etc.)

Next invoice: This is the date when the next recurring invoice will be generated.

Stop recurring after: Make it checked, if you would like to specify the date to stop recurring the invoice.

Recalculate: create or regenerate the next invoice date based on recurring period

The recurring invoice tab is a summary view of the list of recurring invoice that

you have created.

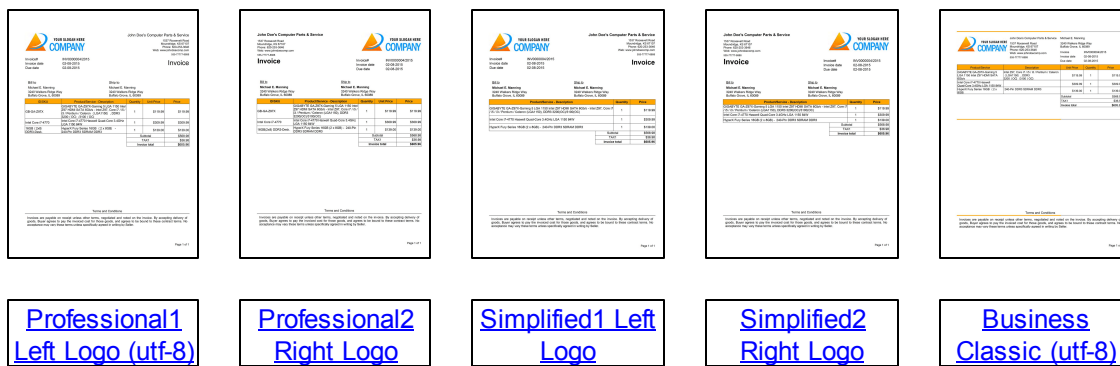
Invoice#	Next Invoice	Recurring Period	Stop After	Customer Name	Invoice Total
INV0000012/2015	02-24-2015	14 days	12-31-2015	John P. Davila	\$21.30
INV0000011/2015	03-10-2015	1 month		George C. Wilson	\$9.95
2 Invoice(s)					\$31.25

Product/Service ID	Name	Description	Price	QTY	Tax 1	Line Total
SERV02	Web hosting Service "BASIC" Plan \$9.95/month	1Gb HDD, 50Gb Bandwidth, 1 domain name	\$9.95	1		\$9.95

When you start f-billing it will check automatically if any recurring invoices are ready. Click on Generate recurring Invoices tab - this checks if any recurring invoices are ready and automatically create invoices at given date intervals.

4.5 Invoice templates

The following invoice templates are available



Utf-8 templates using unicode (Arial Unicode MS) font set for display any international characters.

Professional1 Left Logo (utf-8)



John Doe's Computer Parts & Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndecomp.com
555-7777-8888

Invoice# INV0000004/2015
Invoice date 02-08-2015
Due date 02-08-2015

Invoice

Bill to
Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

Ship to
Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

ID/SKU	Product/Service - Description	Quantity	Unit Price	Price
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150) , DDR3 3200 (OC) /3100 (OC)	1	\$119.99	\$119.99
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W	1	\$309.99	\$309.99
16GB (2x8) DDR3-Desk.	HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3	1	\$139.00	\$139.00
Subtotal				\$568.98
TAX1				\$36.98
Invoice total				\$605.96

Terms and Conditions

Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.

Professional2 Right Logo

John Doe's Computer Parts & Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-77777-8888



Invoice

Invoice# INV0000004/2015
Invoice date 02-08-2015
Due date 02-08-2015

Bill to

Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

Ship to

Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

ID/SKU	Product/Service - Description	Quantity	Unit Price	Price
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OCC)/3100(OCC)	1	\$119.99	\$119.99
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W	1	\$309.99	\$309.99
16GB(2x8) DDR3-Desk.	HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3	1	\$139.00	\$139.00
Subtotal				\$568.98
TAX1				\$36.98
Invoice total				\$605.96

Terms and Conditions

Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.

Simplified1 Left Logo

		John Doe's Computer Parts & Service 1537 Roosevelt Road Moundridge, KS 67107 Phone: 620-253-3646 Web: www.johndoecomp.com 555-7777-8888																						
Invoice#	INV0000004/2015	Invoice																						
Invoice date	02-08-2015																							
Due date	02-08-2015																							
Bill to Michael E. Manning 3240 Walkers Ridge Way Buffalo Grove, IL 60089		Ship to Michael E. Manning 3240 Walkers Ridge Way Buffalo Grove, IL 60089																						
<table border="1"> <thead> <tr> <th>Product/Service - Description</th> <th>Quantity</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OC)/3100(OC)</td> <td>1</td> <td>\$119.99</td> </tr> <tr> <td>Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W</td> <td>1</td> <td>\$309.99</td> </tr> <tr> <td>HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3</td> <td>1</td> <td>\$139.00</td> </tr> <tr> <td colspan="2">Subtotal</td> <td>\$568.98</td> </tr> <tr> <td colspan="2">TAX1</td> <td>\$36.98</td> </tr> <tr> <td colspan="2">Invoice total</td> <td>\$605.96</td> </tr> </tbody> </table>				Product/Service - Description	Quantity	Price	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OC)/3100(OC)	1	\$119.99	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W	1	\$309.99	HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3	1	\$139.00	Subtotal		\$568.98	TAX1		\$36.98	Invoice total		\$605.96
Product/Service - Description	Quantity	Price																						
GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OC)/3100(OC)	1	\$119.99																						
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HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3	1	\$139.00																						
Subtotal		\$568.98																						
TAX1		\$36.98																						
Invoice total		\$605.96																						
<p align="center">Terms and Conditions</p> <p>Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.</p>																								
<p align="right">Page 1 of 1</p>																								

Simplified2 Right Logo

John Doe's Computer Parts & Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888



Invoice

Invoice# INV0000004/2015
Invoice date 02-08-2015
Due date 02-08-2015

Bill to

Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

Ship to


Michael E. Manning
3240 Walkers Ridge Way
Buffalo Grove, IL 60089

Product/Service - Description	Quantity	Price
GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OC)/3100(OC)	1	\$119.99
Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W	1	\$309.99
HyperX Fury Series 16GB (2 x 8GB) - 240-Pin DDR3 SDRAM DDR3	1	\$139.00
Subtotal		\$568.98
TAX1		\$36.98
Invoice total		\$605.96

Terms and Conditions

Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.

Business Classic (utf-8)

		John Doe's Computer Parts & Service 1537 Roosevelt Road Moundridge, KS 67107 Phone: 620-253-3646 Web: www.johndoecomp.com 555-7777-8888		Michael E. Manning 3240 Walkers Ridge Way Buffalo Grove, IL 60089 Invoice INV0000004/2015 Invoice date 02-08-2015 Due date 02-08-2015	
---	--	---	--	--	--

Product/Service	Description	Unit Price	Quantity	Price
GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s	Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150) , DDR3 3200 (OC) / 3100 (OC)	\$119.99	1	\$119.99
Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W		\$309.99	1	\$309.99
HyperX Fury Series 16GB (2 x 8GB)	240-Pin DDR3 SDRAM DDR3	\$139.00	1	\$139.00
Subtotal				\$568.98
TAX1				\$36.98
Invoice total				\$605.96

Terms and Conditions

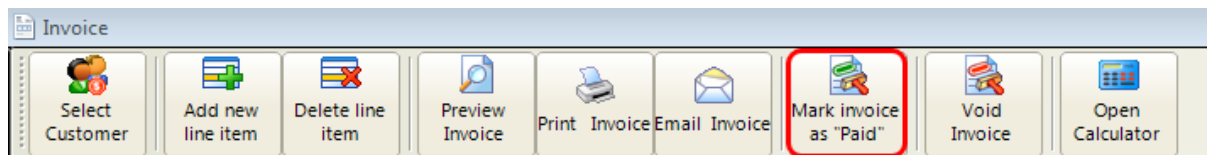
Invoices are payable on receipt unless other terms, negotiated and noted on the invoice. By accepting delivery of goods, Buyer agrees to pay the invoiced cost for those goods, and agrees to be bound to these contract terms. No acceptance may vary these terms unless specifically agreed in writing by Seller.

Page 1 of 1

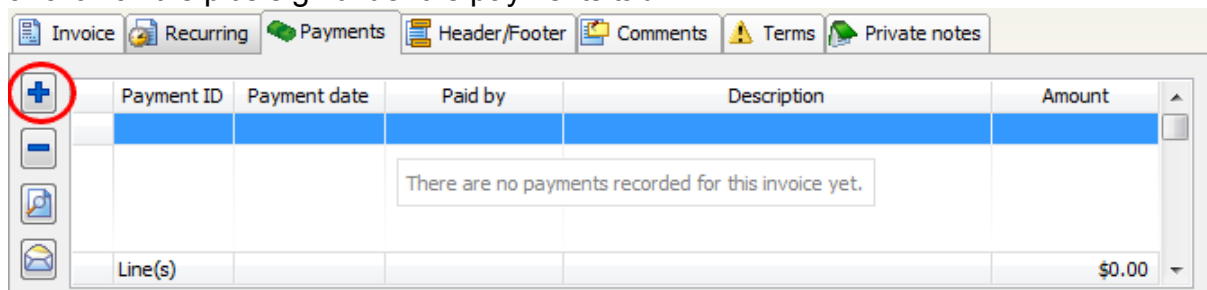
4.6 Payments

How to record payments for invoices:

1. Select and open an invoice
2. Click on the **Mark invoice as "Paid"** button



or click on the plus sign under the payments tab



This will open the **Record Payment for invoice** window

The 'Record Payment for Invoice' window displays the following information:

- Invoice Balance:** \$605.96
- Payment record details:**
 - Payment Amount:** 605.96
 - Payment Date:** 2015.02.11.
 - Paid by:** Cash
 - Description:** (empty text field)
- Payment Receipt:**
 - ☐ Paid in full and close invoice
 - ☐ Send payment receipt
 - ☐ Attach updated invoice too
- Buttons:** Save Payment (with a green checkmark icon) and Cancel (with a red X icon).

You can record unlimited payments for each invoice.

3. Enter the Payment Amount
4. Select the payment date
5. Select the payment method from Paid by listbox or enter new one
6. Click on "Save Payment"

optional

You can enter description text for each payment.

Paid in full and close the invoice: make it checked and the payment amount field will be automatically filled with the current invoice balance. After clicking on the save payment the invoice status will be : PAID and the invoice will be closed.

You cannot modify closed invoices.

If you need to edit a closed invoice then first click on the "Void Invoice" button after click on the "Reactivate Invoice" button.

if the invoice status is : PAID you can place paid image on the invoice. You need to setup this option under the [settings menu](#).

Paid invoice example:



John Doe's Computer Parts & Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888

Invoice# INV0000008/2015
Invoice date 02-09-2015
Due date 02-09-2015

Invoice

Bill to
Octavio S. Benavides
3802 Lakeland Terrace
Petersburg, MI 49270

Ship to
Octavio S. Benavides
3802 Lakeland Terrace
Petersburg, MI 49270

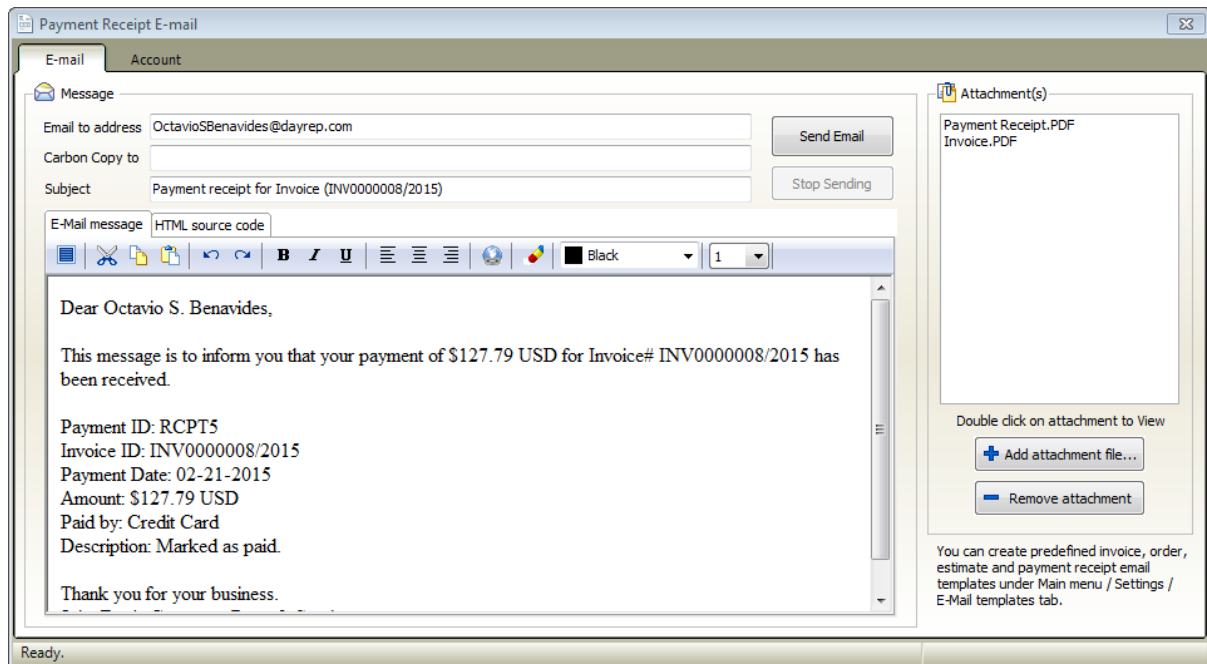
ID/SKU	Product/Service - Description	Quantity	Unit Price	Price
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s - Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150) , DDR3 3200 (OC) / 3100 (OC)	1	\$119.99	\$119.99
Subtotal				\$119.99
TAX1				\$7.80
Invoice total				\$127.79
Total Paid				\$127.79
Balance				\$0.00



Send payment receipt: make it checked if you would like to send payment receipt email after payment recorded.

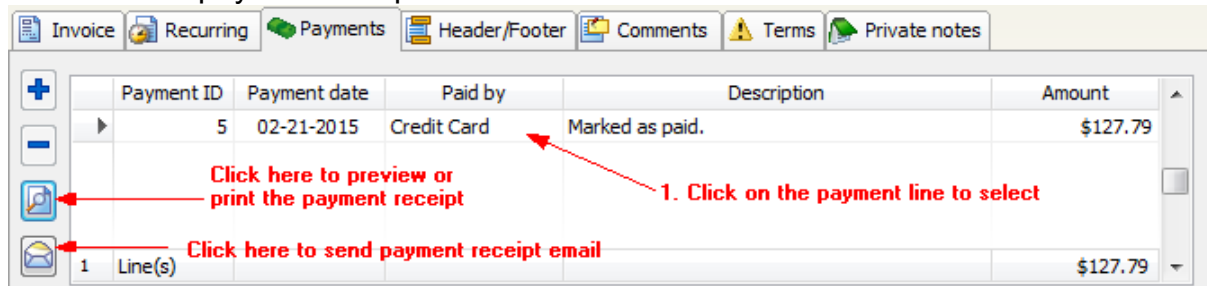
This will open the email window and the payment receipt will be automatically attached to the message.

Also you can automatically **attach the updated invoice** to the message.



You can create predefined payment receipt email template and you can customize the payment receipt text labels under the [settings menu tab](#)

Print or email payment receipt:



Payment receipt example:

John Doe's Computer Parts & Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888

Payment Receipt

Payment Receipt# RCPT5
Payment for Invoice# INV0000008/2015

Payment Date: 2015.02.21.

Amount received from:

Octavio S. Benavides
3802 Lakeland Terrace
Petersburg, MI 49270

Payment Amount: \$127.79

Description: Marked as paid.

Payment Received in:

Credit Card

Total Amount Due	\$127.79
Total Paid	\$127.79
Balance Due	\$0.00

5 Orders

At main window click on **Orders tab**

Under the orders tab you can **manage your orders database** for the current company account.

(note: You can create unlimited company accounts. Each company account has a separated orders database.)

Order#	Invoice date	Due date	Customer Name	Status	Emailed on	Printed on	Order Total
ORD0100004/2015	02-11-2015	02-11-2015	Starley A. Leblanc	Draft	Never	Never	\$126.74
ORD0100003/2015	02-10-2015	02-10-2015	Sonja K. Norris	Sent	Never	02-10-2015	\$195.96
ORD0100002/2015	02-10-2015	02-10-2015	George C. Benefield	Sent	Never	02-10-2015	\$171.47
ORD0100001/2015	02-10-2015	02-10-2015	George C. Wilson	Invoiced	Never	02-10-2015	\$58.52
4 Order(s)							\$425.95

Product/Service ID	Name	Description	Price	QTY	Tax1	Line Total
AMD A10-6800K	AMD A10-6800K Richland 4.1Ghz	(4.4Ghz Turbo) Socket FM2 100W	\$119.00	1	<input checked="" type="checkbox"/>	\$119.00

Find text

Find What: John

Find in: Customer Name

Match: From any part of field

Search: All

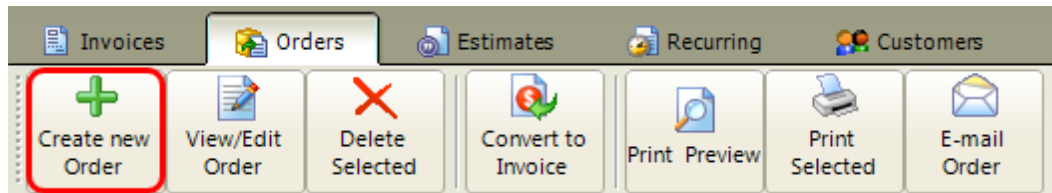
☐ Match Case ☒ Match Format

Find next

Close

5.1 Creating an Order

At main window click on **Orders tab >> Create new Order**



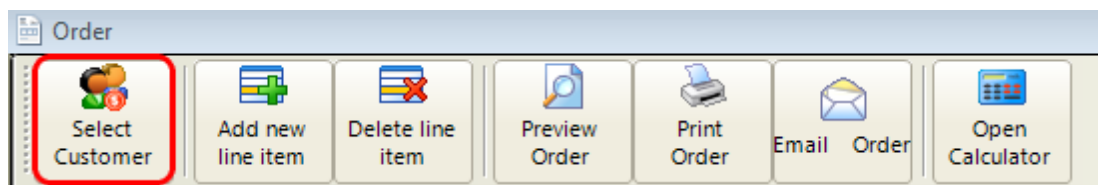
This will open the new Order window

The 'Order' window is displayed, showing a form for creating a new order. The 'Customer' section has a dropdown menu for 'Order to' and a 'Select Customer' button. The 'Ship to' section has fields for 'Address' and 'Phone'. The 'Order' section on the right contains fields for 'Order #', 'Order date', 'Due date', 'Terms', and 'Order ref. #'. Below these fields is a table with columns: ID/SKU, Product/Service, Description, Unit Price, Quantity, Pcs/Weight, Tax1, and Price. The table is currently empty, with a message: '< 1. Select customer first. 2. Click on "Add new line item" toolbar button to add a new row... >'. At the bottom, there are tabs for 'Order', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Order' tab is active, showing fields for 'Extra cost name', 'Discount rate', 'Sales Person', 'Template', 'TAX1', and 'Status' (set to 'Draft'). A 'Summary' section on the right shows a list of items and their amounts.

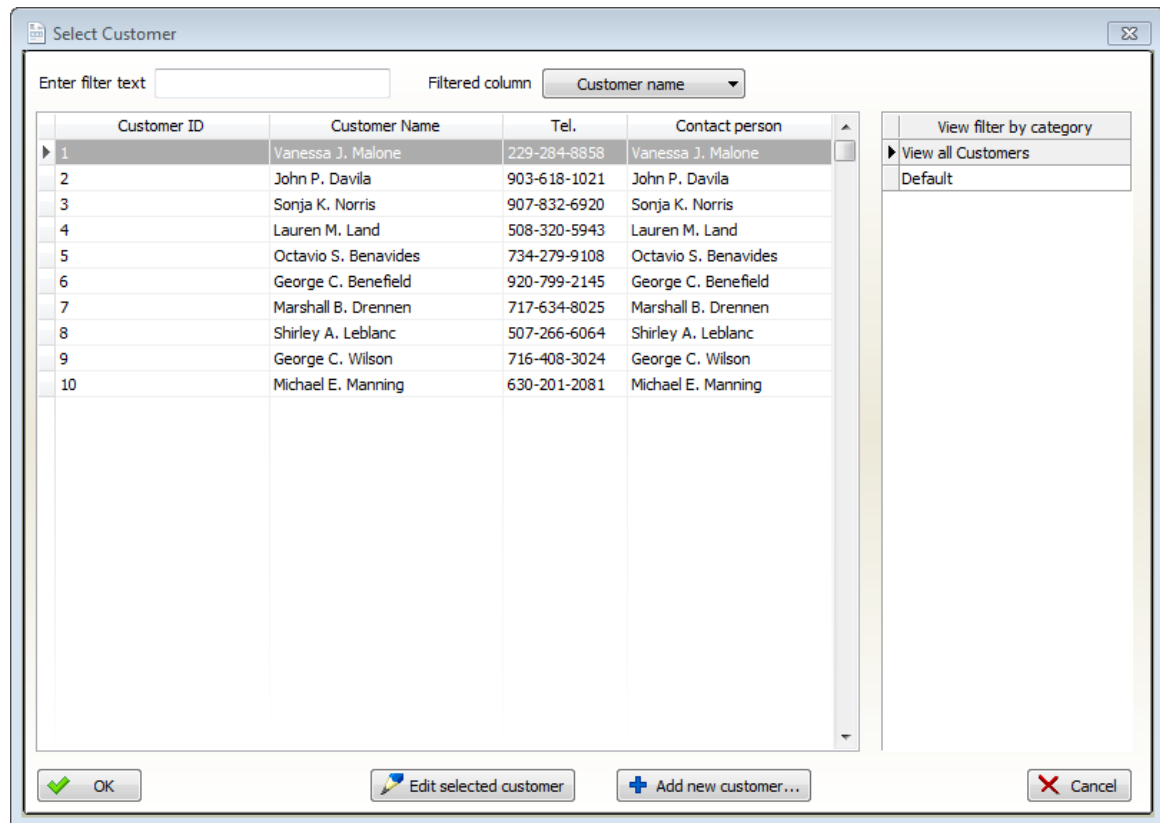
ID/SKU	Product/Service	Description	Unit Price	Quantity	Pcs/Weight	Tax1	Price
< 1. Select customer first. 2. Click on "Add new line item" toolbar button to add a new row... >							

Summary	
Discount	\$0.00
Subtotal	\$0.00
Tax 1	\$0.00
Extra cost	\$0.00
Order total	\$0.00
Total Paid	\$0.00
Balance	\$0.00

1. First you need to select the customer for the new order, click on **Select Customer button**



This will open the **select customer window**



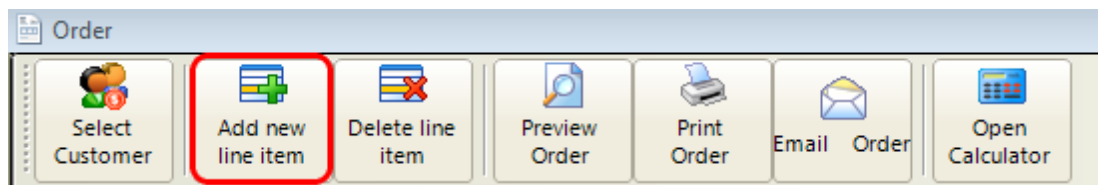
Select a customer or add a new customer.

If you have a lot of customers you can filter the list by

- clicking on a category line
- typing the first 1-3 letters of the customer name to the filter text field.

After click on **OK**

2. Add lines items for the order. Click on **Add new line item** button



This will open the **Product/Services Window**

Products/Services

Enter filter text Filtered column **Product/Service Name** ☐ Show products out of stock

ID/SKU	Product/Service Name	Unit Price	Service	Stock
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z9	\$119.99	<input type="checkbox"/>	18
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel E	\$53.00	<input type="checkbox"/>	10
ASUS M5A99FX PRO	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + S	\$129.00	<input type="checkbox"/>	13
Intel Core i5-4430	Intel Core i5-4430 Haswell Quad-Core 3.0GHz L	\$184.00	<input type="checkbox"/>	8
AMD A10-6800K	AMD A10-6800K Richland 4.1GHz	\$119.00	<input type="checkbox"/>	4
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4GHz L	\$309.99	<input type="checkbox"/>	1
AMD A8-5600K	AMD A8-5600K Trinity Quad-Core 3.6GHz	\$83.00	<input type="checkbox"/>	11
8GB(2x4) DDR3 Lapt	8GB(2x4GB) 204 pins DDR3-1600	\$67.00	<input type="checkbox"/>	32
16GB(2x8) DDR3-Des	HyperX Fury Series 16GB (2 x 8GB)	\$139.00	<input type="checkbox"/>	21
ASUS VN248H-P	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG	\$169.00	<input type="checkbox"/>	6
Dell E1914H	Dell E1914H Black 18.5" 5ms Widescreen LED Ba	\$94.00	<input type="checkbox"/>	1
ASUS ROG PG278Q	ASUS ROG PG278Q Black 27" 1ms(GTG) Widescr	\$799.00	<input type="checkbox"/>	3
MSI R9	MSI R9 270X GAMING 2G Radeon R9 270X 2GB :	\$169.00	<input type="checkbox"/>	5
ASUS MATRIX-GTX98	ASUS MATRIX-GTX980-P-4GD5 GeForce GTX 980	\$649.00	<input type="checkbox"/>	1
SERV03	PC Vulnerability checking	\$10.00	<input checked="" type="checkbox"/>	
SERV02	Web hosting Service "BASIC" Plan	\$9.95	<input checked="" type="checkbox"/>	
SERV01	Software maintenance	\$45.00	<input checked="" type="checkbox"/>	0

17 Line(s)

View filter by category

- View all products/services
- View all products
- View all services
- Computer Maintenance
- LCD Monitor
- Motherboards
- Processors-Desktop
- RAM Memory-Desktop
- RAM Memory-Laptop
- Video Cards

OK Edit selected Product/Service Add new Product/Service Cancel

Select a product or add a new product.

If you have a lot of products you can filter the list by

- clicking on a category line
- typing the first 1-3 letters of the product name to the filter text field.

After click on **OK**

3. Set up additional settings:

Order tab

Order Header/Footer Comments Terms Private notes

Extra cost name Discount rate

Extra cost

Sales Person TAX1

Template

Status **Draft**

Emailed on: Never

Printed on: Never

Extra cost name: enter extra cost name here (p.e. shipping, handling, postage etc.) or select from the predefined text (appears on printed orders)

Extra cost: the extra cost value (no tax calculated on this value)

Sales person: by default the logged in username here. Under reports menu you can create sales

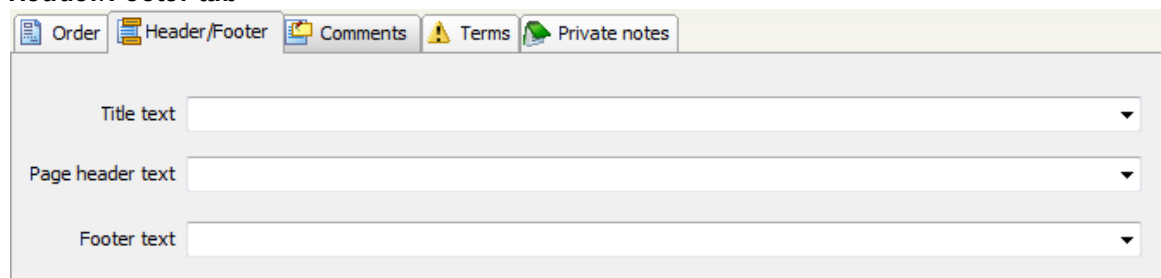
reports by sales person

Template: This is the [template](#) that will be used to generate the print version of the order. Use the preview button to check the order before print.

Discount rate: overall discount rate for the order (the discount rate will be applied on the order subtotal)

Tax1 rate, Tax2 rate: The tax rate for this order. The default value is comes from the customer record if present and system settings if not. if the customer record marked as 'TAX Exempted' then no tax will be calculated on the order

Header/Footer tab

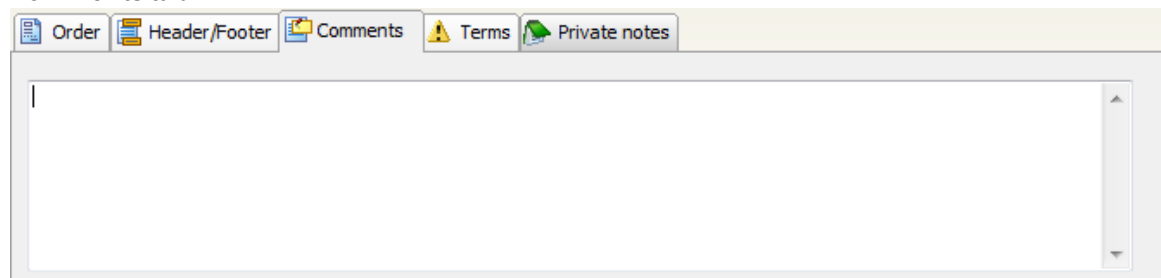


Title text: order title goes here, appears on order only once. You can choose from the predefined list of header lines

Page header text: Page header goes here, (if multiple pages then appears on all order pages), You can choose from the predefined list of header lines

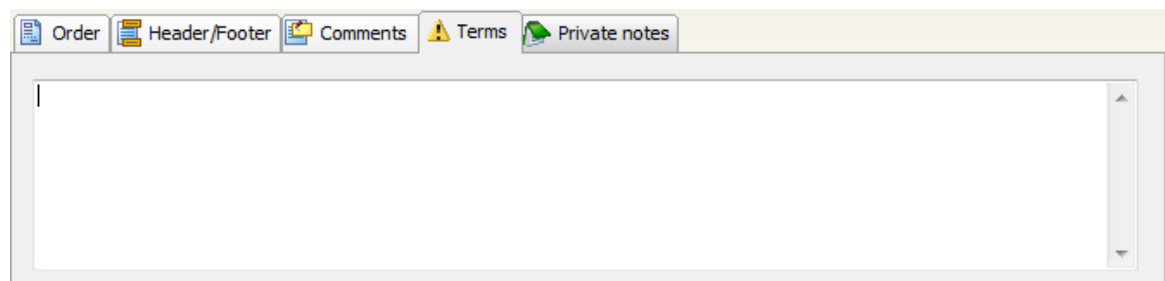
Page footer text: Page footer goes here, (if multiple pages then appears on all order pages), You can choose from the predefined list of footer lines

Comments tab



Comments: comments text goes here appears on printed orders

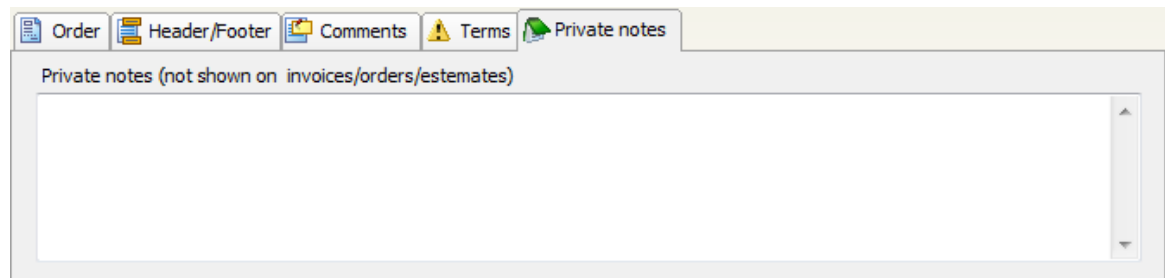
Terms tab



The screenshot shows a software interface with a tabbed menu at the top. The tabs are labeled 'Order', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Terms' tab is currently selected and highlighted. Below the tabs is a large, empty rectangular text area with a vertical scrollbar on the right side, intended for entering default terms and conditions.

The default terms and conditions text for the new order. Appears on printed order

Private notes tab

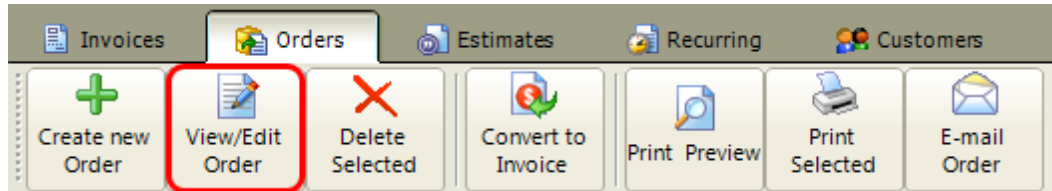


The screenshot shows the same software interface as above, but with the 'Private notes' tab selected and highlighted. The text area below the tabs now contains the text 'Private notes (not shown on invoices/orders/estimates)' at the top, followed by a large, empty rectangular text area with a vertical scrollbar on the right side for entering private notes.

Private notes: any notes text for the order, not appears on printed orders

5.2 Editing an Order

1. At main menu click on **Orders** tab
2. **Click on the order line** to select it
3. Click on **Edit/View order button** or double click on the order line to edit



This will open the order window

The 'Order' window displays the following information:

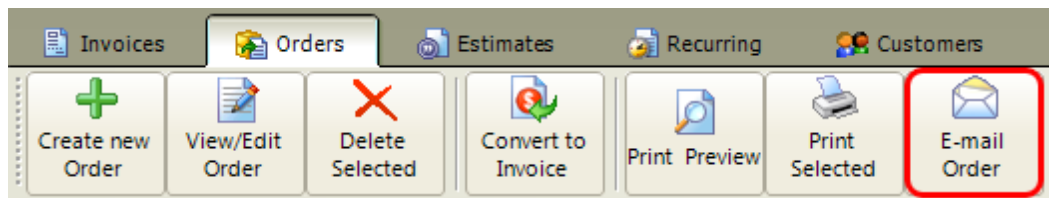
- Customer (ID: 6):** Order to: George C. Benefield, Address: 3891 Reeves Street, Milwaukee, WI 53202, Email: GeorgeCBenefield@rhyta.com, Phone: 920-799-2145.
- Ship to:** George C. Benefield, Address: 3891 Reeves Street, Milwaukee, WI 53202.
- Order Details:**
 - Order #: ORD0100002/2015
 - Order date: 02-10-2015
 - Due date: 02-10-2015
 - Terms: Cash on delivery
 - Order ref. #:
- Order Line(s):**

ID/SKU	Product/Service	Description	Unit Price	Quantity	Pcs/Weight	Tax1	Price
Dell E1914H	Dell E1914H Black 18.5" 5ms Widescreen Li		\$94.00	1		<input checked="" type="checkbox"/>	\$94.00
8GB(2x4) DDR3 Laptop	8GB(2x4GB) 204 pins DDR3-1600	PC3-12800 Non-ECC RAM Laptop	\$67.00	1		<input checked="" type="checkbox"/>	\$67.00
- Summary:**

Discount	\$0.00
Subtotal	\$161.00
Tax1	\$10.47
Extra cost	\$0.00
Order total	\$171.47
Total Paid	\$0.00
Balance	\$171.47

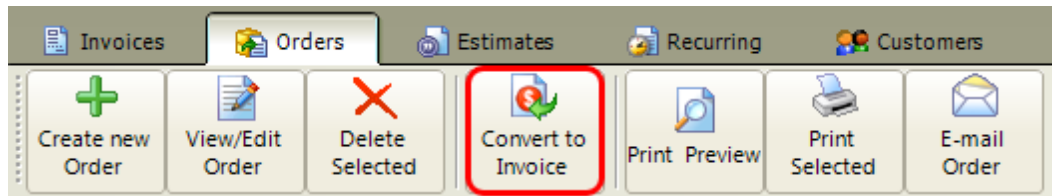
When you've finished editing the fields, just close the window. Your changes will be saved automatically .

5.3 Emailing an Order



5.4 Convert Order to Invoice

1. At main menu click on **Orders tab**
2. **Click on the order line** to select it
3. **Click on Convert to Invoice** button to create an invoice from the selected order.



The new invoice status will be "Draft"

You can convert an order to an invoice as many times as needed.

6 Estimates

At main window click on **Estimates tab**

Under the estimates tab you can **manage your estimates database** for the current company account.

(note: You can create unlimited company accounts. Each company account has a separated estimates database.)

Estimate#	Estimate date	Due date	Customer Name	Status	Emailed on	Printed on	Estimate total
EST0200005/2015	02-11-2015	02-11-2015	George C. Wilson	Draft	Never	Never	\$323.76
EST0200004/2015	02-10-2015	02-10-2015	George C. Benefield	Sent	Never	02-10-2015	\$179.99
EST0200003/2015	02-10-2015	02-10-2015	Michael E. Manning	Accepted	Never	02-10-2015	\$691.19
EST0200002/2015	02-10-2015	02-10-2015	Sonja K. Norris	Declined	Never	02-10-2015	\$179.99
EST0200001/2015	02-10-2015	02-10-2015	Vanessa J. Malone	Sent	Never	02-10-2015	\$600.64
5 Estimate(s)							\$1,651.81

Product/Service ID	Name	Description	Price	QTY	Tax1	Line Total
Intel Core i5-4430	Intel Core i5-4430 Haswell Quad-Core 3.0GHz LGA 1150 84W Des		\$184.00	1	✓	\$184.00
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel B85 HDMI SATA 6G	Intel B85, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 1600/1333	\$53.00	1	✓	\$53.00
8GB(2x4) DDR3 Laptop	8GB(2x4GB) 204 pins DDR3-1600	PC3-12800 Non-ECC RAM Laptop	\$67.00	1	✓	\$67.00
3 Line(s)						

Find text

Find What: John

Find in: Customer Name

Match: From any part of field

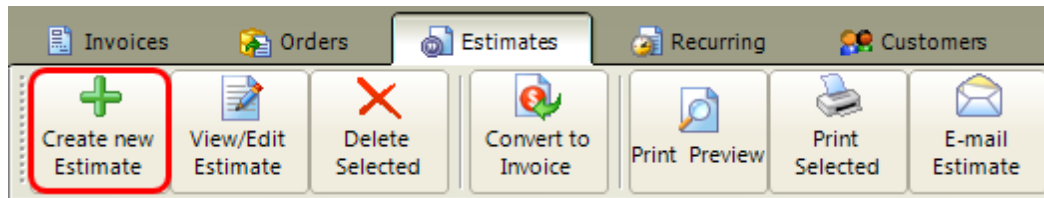
Search: All

☐ Match Case ☒ Match Format

Find next Close

6.1 Creating an Estimate

At main window click on **Estimates tab >> Create new Estimate**

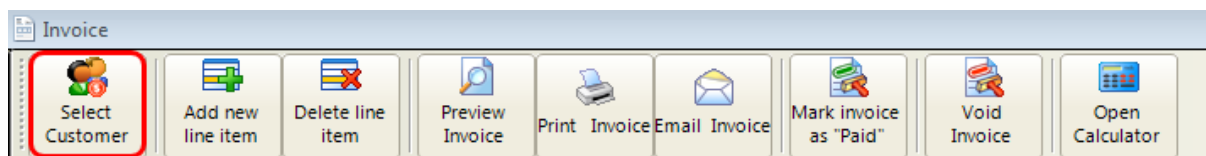


This will open the new Estimate window

ID/SKU	Product/Service	Description	Unit Price	Quantity	Pcs/Weight	Tax1	Price
< 1. Select customer first. 2. Click on "Add new line item" toolbar button to add a new row... >							

Summary	
Discount	\$0.00
Subtotal	\$0.00
Tax1	\$0.00
Extra cost	\$0.00
Estimate Total	\$0.00
Total Paid	\$0.00
Balance	\$0.00

1. First you need to select the customer for the new estimate, click on **Select Customer button**



This will open the **select customer window**

Customer ID	Customer Name	Tel.	Contact person
1	Vanessa J. Malone	229-284-8858	Vanessa J. Malone
2	John P. Davila	903-618-1021	John P. Davila
3	Sonja K. Norris	907-832-6920	Sonja K. Norris
4	Lauren M. Land	508-320-5943	Lauren M. Land
5	Octavio S. Benavides	734-279-9108	Octavio S. Benavides
6	George C. Benefield	920-799-2145	George C. Benefield
7	Marshall B. Drennen	717-634-8025	Marshall B. Drennen
8	Shirley A. Leblanc	507-266-6064	Shirley A. Leblanc
9	George C. Wilson	716-408-3024	George C. Wilson
10	Michael E. Manning	630-201-2081	Michael E. Manning

Select a customer or add a new customer.

If you have a lot of customers you can filter the list by

- clicking on a category line
 - typing the first 1-3 letters of the customer name to the filter text field.
- After click on **OK**

2. Add lines items for the estimate. Click on **Add new line item** button

Invoice

Select Customer Add new line item Delete line item Preview Invoice Print Invoice Email Invoice Mark invoice as "Paid" Void Invoice Open Calculator

This will open the **Product/Services Window**

Products/Services

Enter filter text Filtered column **Product/Service Name** ☐ Show products out of stock

ID/SKU	Product/Service Name	Unit Price	Service	Stock
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z9	\$119.99	<input type="checkbox"/>	18
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel E	\$53.00	<input type="checkbox"/>	10
ASUS M5A99FX PRO	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + S	\$129.00	<input type="checkbox"/>	13
Intel Core i5-4430	Intel Core i5-4430 Haswell Quad-Core 3.0GHz L	\$184.00	<input type="checkbox"/>	8
AMD A10-6800K	AMD A10-6800K Richland 4.1GHz	\$119.00	<input type="checkbox"/>	4
Intel Core i7-4770	Intel Core i7-4770 Haswell Quad-Core 3.4GHz L	\$309.99	<input type="checkbox"/>	1
AMD A8-5600K	AMD A8-5600K Trinity Quad-Core 3.6GHz	\$83.00	<input type="checkbox"/>	11
8GB(2x4) DDR3 Lapt	8GB(2x4GB) 204 pins DDR3-1600	\$67.00	<input type="checkbox"/>	32
16GB(2x8) DDR3-Des	HyperX Fury Series 16GB (2 x 8GB)	\$139.00	<input type="checkbox"/>	21
ASUS VN248H-P	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG	\$169.00	<input type="checkbox"/>	6
Dell E1914H	Dell E1914H Black 18.5" 5ms Widescreen LED Ba	\$94.00	<input type="checkbox"/>	1
ASUS ROG PG278Q	ASUS ROG PG278Q Black 27" 1ms(GTG) Widescr	\$799.00	<input type="checkbox"/>	3
MSI R9	MSI R9 270X GAMING 2G Radeon R9 270X 2GB :	\$169.00	<input type="checkbox"/>	5
ASUS MATRIX-GTX98	ASUS MATRIX-GTX980-P-4GD5 GeForce GTX 980	\$649.00	<input type="checkbox"/>	1
SERV03	PC Vulnerability checking	\$10.00	<input checked="" type="checkbox"/>	
SERV02	Web hosting Service "BASIC" Plan	\$9.95	<input checked="" type="checkbox"/>	
SERV01	Software maintenance	\$45.00	<input checked="" type="checkbox"/>	0

17 Line(s)

View filter by category

- View all products/services
- View all products
- View all services
- Computer Maintenance
- LCD Monitor
- LED Monitor
- Motherboards
- Processors-Desktop
- RAM Memory-Desktop
- RAM Memory-Laptop
- Video Cards

OK Edit selected Product/Service Add new Product/Service Cancel

Select a product or add a new product.

If you have a lot of products you can filter the list by

- clicking on a category line
- typing the first 1-3 letters of the product name to the filter text field.

After click on **OK**

3. Set up additional settings:

Estimate tab

Estimate Header/Footer Comments Terms Private notes

Extra cost name Discount rate

Extra cost TAX1

Sales Person Status **Draft**

Template Emailed on: Never

Printed on: Never

Extra cost name: enter extra cost name here (p.e. shipping, handling, postage etc.) or select from the predefined text (appears on printed estimates)

Extra cost: the extra cost value (no tax calculated on this value)

Sales person: by default the logged in username here. Under reports menu you can create sales

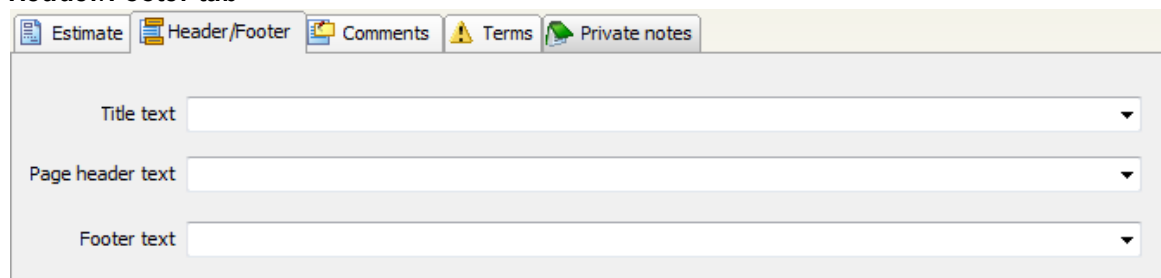
reports by sales person

Template: This is the [template](#) that will be used to generate the print version of the estimate. Use the preview button to check the estimate before print.

Discount rate: overall discount rate for the estimate (the discount rate will be applied on the estimate subtotal)

Tax1 rate, Tax2 rate: The tax rate for this estimate. The default value is comes from the customer record if present and system settings if not. if the customer record marked as 'TAX Exempted' then no tax will be calculated on the estimate

Header/Footer tab

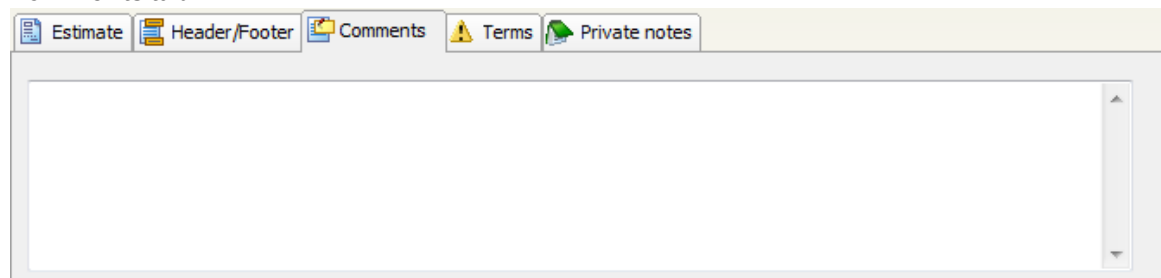


Title text: estimate title goes here, appears on estimate only once. You can choose from the predefined list of header lines

Page header text: Page header goes here, (if multiple pages then appears on all estimate pages), You can choose from the predefined list of header lines

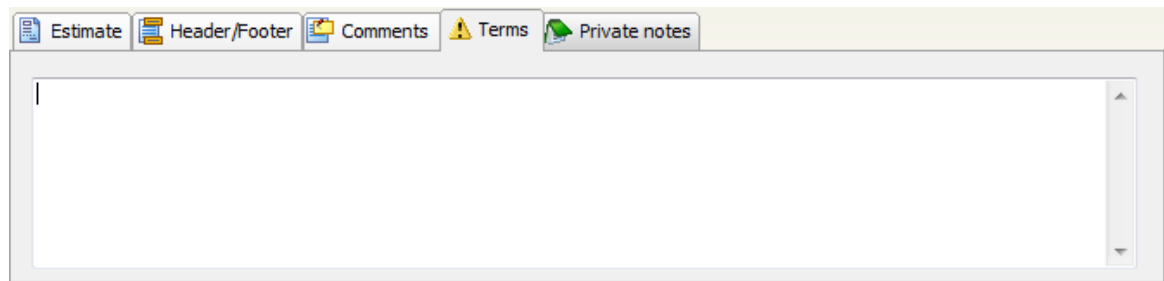
Page footer text: Page footer goes here, (if multiple pages then appears on all estimate pages), You can choose from the predefined list of footer lines

Comments tab



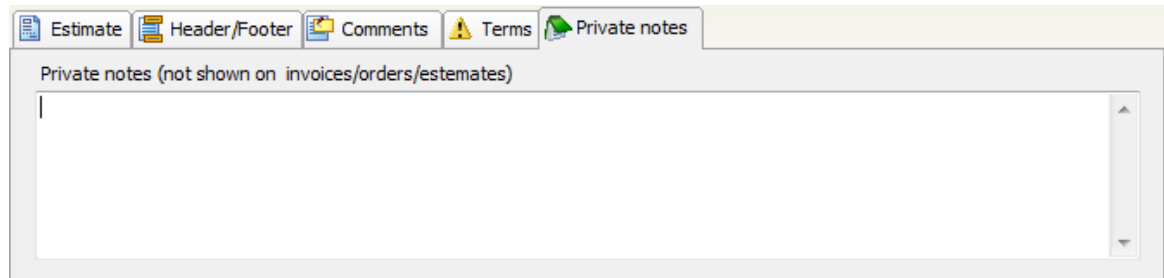
Comments: comments text goes here appears on printed estimates

Terms tab

The screenshot shows a software window with a tabbed interface. The tabs are labeled 'Estimate', 'Header/Footer', 'Comments', 'Terms', and 'Private notes'. The 'Terms' tab is currently selected and highlighted. Below the tabs is a large, empty text area with a vertical scrollbar on the right side, intended for entering default terms and conditions.

The default terms and conditions text for the new estimate. Appears on printed estimate

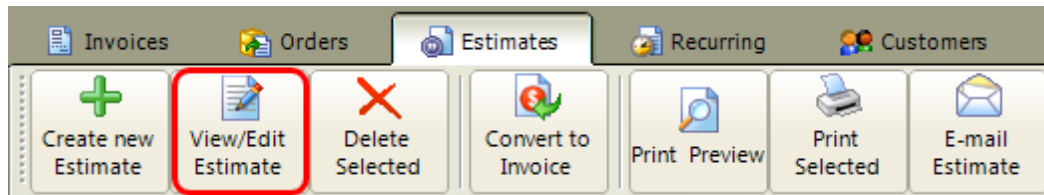
Private notes tab

The screenshot shows the same software window as above, but with the 'Private notes' tab selected. The text area now contains the text 'Private notes (not shown on invoices/orders/estimates)' at the top, followed by a large, empty space for additional notes. A vertical scrollbar is visible on the right side of the text area.

Private notes: any notes text for the estimate, not appears on printed estimates

6.2 Editing an Estimate

1. At main menu click on **Estimates** tab
2. Click on the **estimate** line to select it
3. Click on **Edit/View estimate** button or double click on the estimate line to edit



This will open the estimate window

The Estimate window displays the following information:

Customer: Estimate to: George C. Wilson, Ship to: George C. Wilson
 Address: 4425 Cameron Road, Buffalo, NY 14209
 Email: GeorgeCWilson@rhyta.com, Phone: 716-408-3024

Estimate Details: Estimate # EST0200005/2015, Estimate Date 02-11-2015, Due Date 02-11-2015, Terms Cash on delivery, Order ref. #

ID/SKU	Product/Service	Description	Unit Price	Quantity	Pcs/Weight	Tax1	Price
Intel Core i5-4430	Intel Core i5-4430 Haswell Quad-Core 3.00		\$184.00	1		<input checked="" type="checkbox"/>	\$184.00
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 I	Intel B85, Core i7 / i5 / i3 / Pentium / Celeron (\$53.00	1		<input checked="" type="checkbox"/>	\$53.00
8GB(2x4) DDR3 Laptop	8GB(2x4GB) 204 pins DDR3-1600	PC3-12800 Non-ECC RAM Laptop	\$67.00	1		<input checked="" type="checkbox"/>	\$67.00

3 Line(s) \$304.00

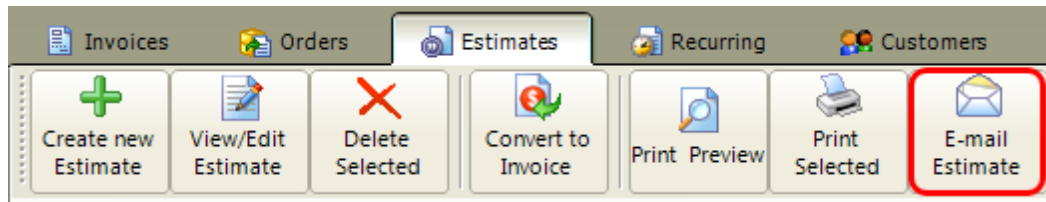
Summary:

Discount	\$0.00
Subtotal	\$304.00
Tax 1	\$19.76
Extra cost	\$0.00
Estimate Total	\$323.76
Total Paid	\$0.00
Balance	\$323.76

Extra cost name: [Dropdown]
 Extra cost: \$0.00
 Sales Person: [Text]
 Template: Professional 1 (logo on left side, UTF8)
 Discount rate: 0
 TAX1: 6.5
 Status: Draft
 Emailed on: Never
 Printed on: Never

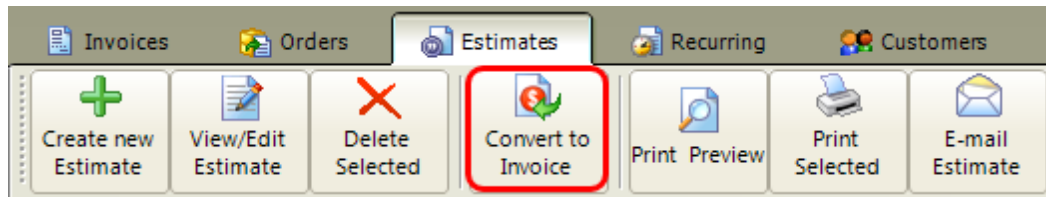
When you've finished editing the fields, just close the window. Your changes will be saved automatically .

6.3 Emailing an Estimate



6.4 Convert Estimate to Invoice

1. At main menu click on **Estimates** tab
2. **Click on the estimate line** to select it
3. Once an estimate has been accepted by a customer all just **click the "Convert Invoice" button** to create an invoice from the estimate



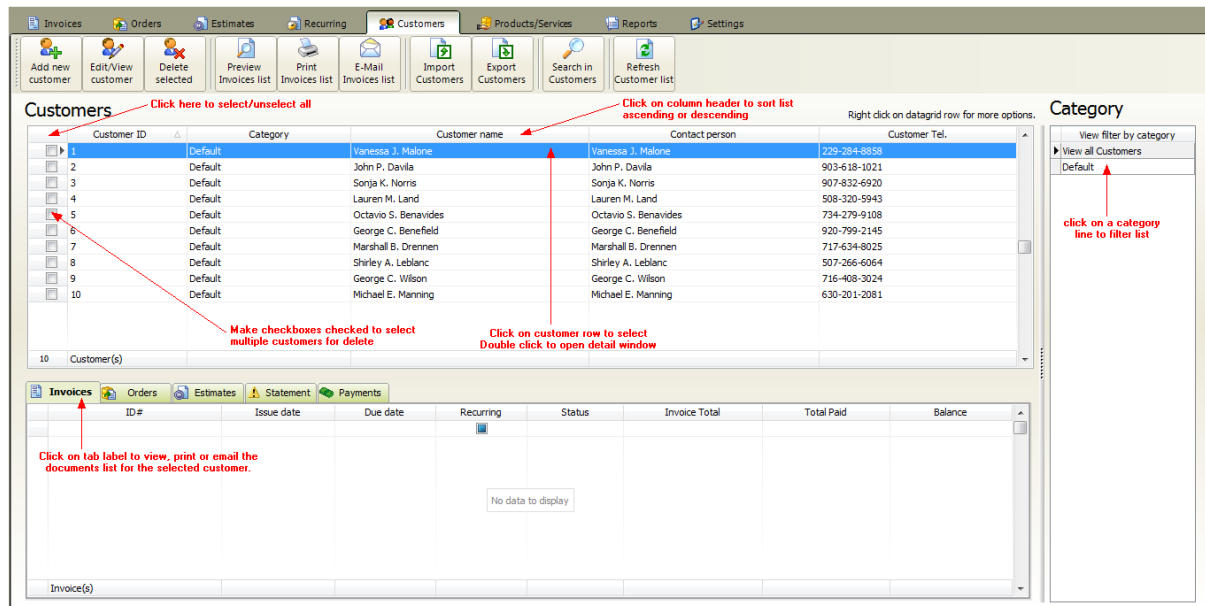
The new invoice status will be "Draft"

You can convert an estimate to an invoice as many times as needed.

7 Customers

At main window click on **Customers** tab

Customers menu



Under the customers tab you can **manage your customers database** for the current company account.

(note: You can create unlimited company accounts. Each company account has a separated customers database.)

The following options available

- [Add new customer](#)
- [Selecting customers](#)
- [Editing existing customer](#)
- [Deleting customers](#)
- [Import customers list](#) from an Excel (CSV) file
- [Export customers list](#) to CSV file
- [Search in customers list](#)
- [Filtering customers by category](#)
- [Print or email customer related documents](#)

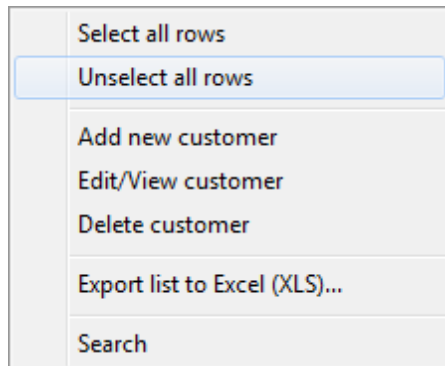
Selecting customers

- If you would like to edit, view or delete a customer then first you need to select by

clicking on a datagrid row.

- Double click on the listing to open the customer detail window
- Make the checkbox(es) checked near "customer id" column to select multiple customers. (usable for delete only)

Right click on the customers datagrid to open the popup menu:



Deleting customers

- If you would like to delete only one customer just select and click on delete button.
- To delete multiple customers select multiple rows by setting checked the checkboxes at left side. After click on delete button.

You cannot delete customers while they still have invoices, orders or estimates. You need to delete these documents first.

Sorting customers list:

1. Click a column heading to sort by it.
2. The heading of the sort column contains an arrow whose direction indicates the sort order, up for ascending (0-9, A-Z) and down for descending (Z-A, 9-0).
3. To switch between descending and ascending sort order, click the column heading.

Filtering customers by category

You can group your customers into categories. Click on a category row in category list to filter the listing by selected category.

Search in customers

If you have hundreds or thousands of customers use the search pop-up window to find a customer by keyword.

Click the Search button to perform the search.

Search window

Find text

Find What:

Find in:

Match:

Search:

☐ Match Case ☒ Match Format

Print or email customer related documents list

In this example the selected customer has three invoices.

[illegible]

Invoices tab: a list of all invoices for the customer.

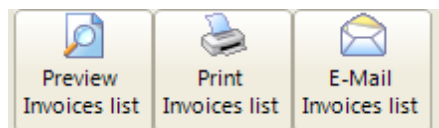
Orders tab: a list of all orders for the customer.

Estimates tab: a list of all estimates for the customer.

Statement tab: a list of overdue "Status = Past due" invoices for the customer.

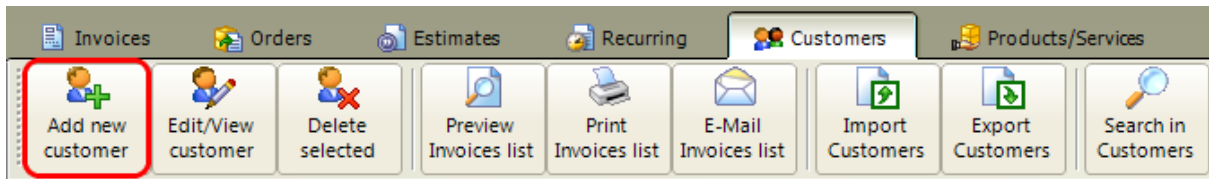
Payments tab: a list of all recorded payments for the customer.

Click on toolbar buttons to preview, print or email invoices list or (orders list/ estimates list/ payments list or statement depends on which tab is selected) for the selected customer:



7.1 Creating a Customer

At main menu click on **Customers >> Add new customer**



This will open the Add new customer window

A screenshot of the 'Add new Customer' window. The window has a title bar and a close button. It contains several sections for data entry: 'Customer' section with 'Customer ID' (text box), 'Category' (dropdown menu set to 'Default'), and 'Status' (checkbox labeled 'Active' which is checked); 'Invoice to (appears on invoices)' section with 'Business name' and 'Address' (text boxes); 'Ship to (appears on invoices)' section with 'Ship to name' and 'Address' (text boxes); 'Contact' section with 'Contant person', 'E-mail address', 'Tel. number', and 'Fax' (text boxes); 'Ship To contact' section with 'Contant person', 'Email address', 'Tel. number', and 'Fax' (text boxes); 'Payment options' section with 'Tax Exempt' (checkbox), 'Specific Tax1 %' (text box), and 'Discount%' (text box set to '0'); 'Additional info' section with 'Country' (dropdown menu) and 'City' (text box); and a 'Notes' section with a large text area. At the bottom are 'OK' and 'Cancel' buttons.

Fields description

Customer ID (mandatory field): alphanumeric identifier for the customer, must be unique

Category (mandatory field): You can group customers into categories. Just select existing category from list or enter a new one

Status: Active by default. Inactive customer will not appear in the customers list when

invoicing

Business Name (mandatory field): the customer's company name or a personal name.

Address (mandatory field, multiple lines): Customer address or other information, appears on invoices

Ship to Name (optional field): company name or a personal name

Shipping Address (optional field, multiple lines): use this field if you would like to print the shipping address on invoice

Email (mandatory field): Customer email address. This email address is used by default when emailing invoices, estimates, orders or payment receipts. Email address can be changed per customer, per invoice or when emailing.

Specific Tax1, Specific Tax2 (optional): Default tax rate for the customer, automatically applied when invoicing. Tax rates can be changed per customer, per invoice or application wide

Tax Exempt: Check this if your customer is exempt from any taxes. In this case no tax calculated for this customer on invoices.

Discount %: Any default discount you specified for the customer will be automatically applied when invoicing.

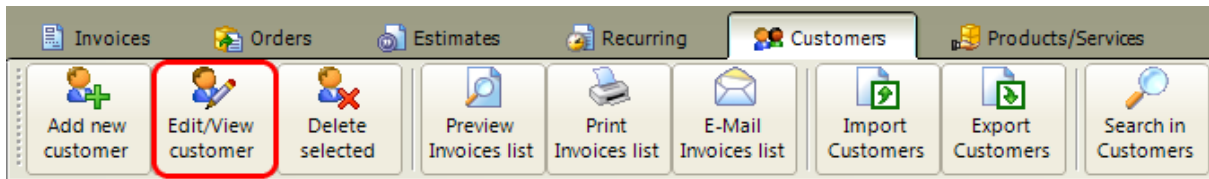
Country, City (optional fields): reserved for future reporting needs

Notes (optional field, multiple lines): Any kind of notes, not printed on invoices.

When you've entered all necessary information, click on OK button to save changes

7.2 Editing a Customer

1. At main menu click on **Customers tab**
2. **Click on the customer line** to select it
3. Click on **Edit/View customer button** or double click on the customer line to edit



This will open the Edit customer details window

A screenshot of the 'Edit customer details' window. The window has a title bar with 'Edit customer details' and a close button. Inside, there are several sections for editing customer information. At the top, 'Customer ID' is set to '1', 'Category' is 'Default', and 'Status' is 'Active' with a checked checkbox. Below this are two main columns. The left column contains 'Invoice to (appears on invoices)' with fields for 'Business name' (Vanessa J. Malone) and 'Address' (931 Private Lane, Albany, GA 31701). Below that is 'Contact' with fields for 'Contact person' (Vanessa J. Malone), 'E-mail address' (VanessaJMalone@armyspy.com), and 'Tel. number' (229-284-8858). At the bottom left is 'Payment options' with a 'Tax Exempt' checkbox and a 'Discount%' field set to '0'. The right column contains 'Ship to (appears on invoices)' with fields for 'Ship to name' (Vanessa J. Malone) and 'Address' (931 Private Lane, Albany, GA 31701). Below that is 'Ship To contact' with fields for 'Contact person' (Vanessa J. Malone), 'Email address' (VanessaJMalone@armyspy.com), and 'Tel. number' (229-284-8858). At the bottom right is 'Additional info' with 'Country' set to 'UNITED STATES' and 'City' set to 'ALBANY'. A 'Notes' section with a text area is at the bottom left. At the bottom of the window are 'OK' and 'Cancel' buttons.

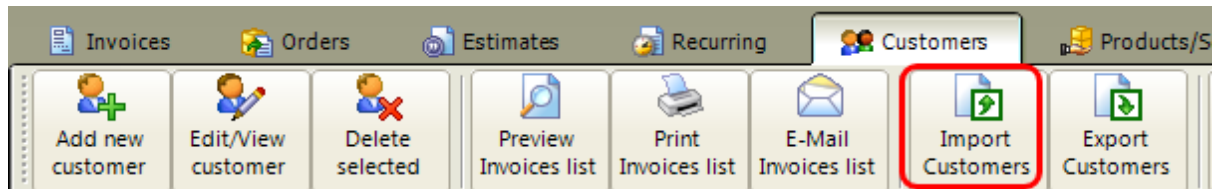
[See the fields description here](#)

When you've finished editing the fields, click on OK button to save changes.

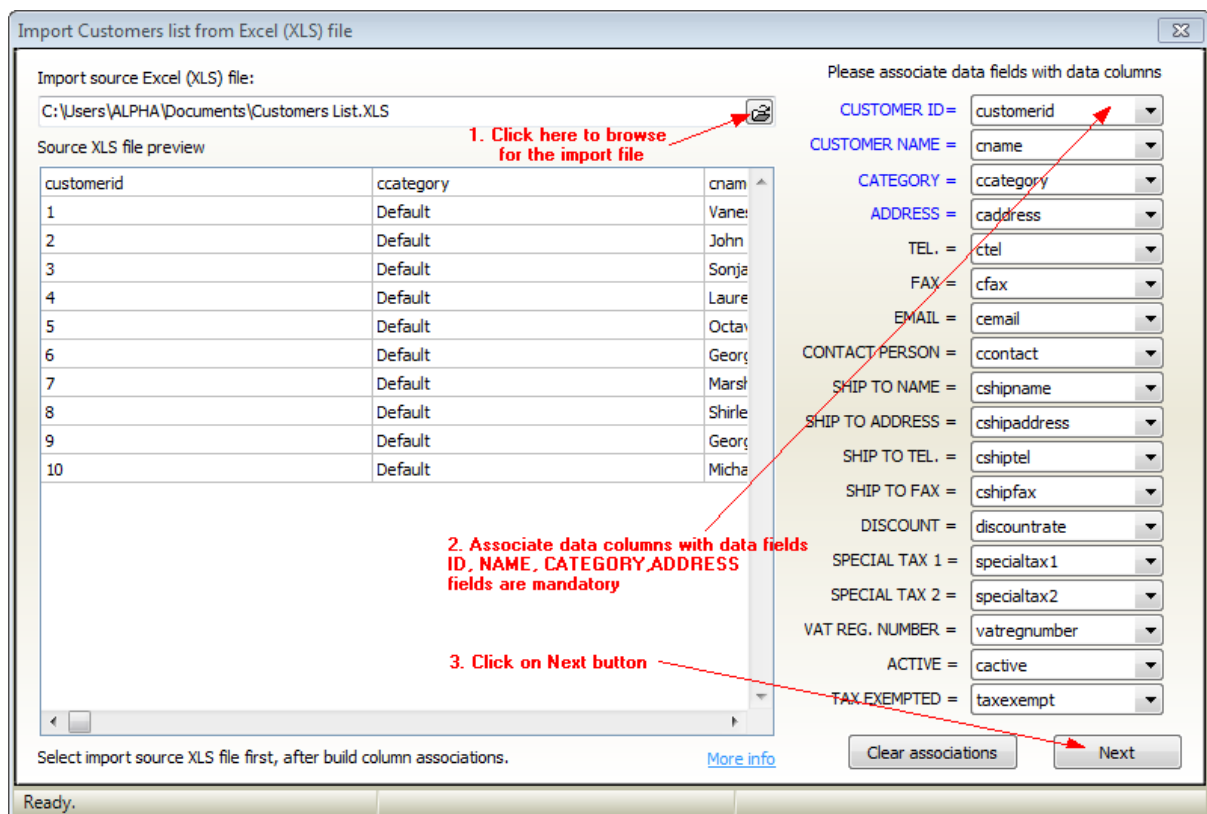
7.3 Importing Customers

At main menu click on **Customers tab**

Click on **Import Customers button** under Customers menu tab to open the import window.



Import Customers Step One



We recommend to use our example import file. You can download it from here.

<http://www.f-billing.com/importexample.zip>

This is a packed (ZIP) file. First you need to extract example files from the ZIP

Just fill out our example excel file with your existing customers data, leave header column names (first row) as it is and try to import.

1. Browse for the import Excel file
2. Associate database fields with data column in the excel file, use the spreadsheet preview to find which column holds the data for the corresponding field. If you do not have a column for the corresponding data in your spreadsheet just select *-Not associated-* option from the drop-down list.
If you are using our example customer import file, data associations will be automatically created!
3. Click on the Next button

Import Customers Step two. All data listed in the "Import Preview datagrid" will be imported to customers database.

Import Customers list from Excel (XLS) file

Import preview

CUSTOMERID	CNAME	CCATEGORY	CADDRESS	CTEL	CFAX	CEMAIL	CCONT
1	Vanessa J. Malone	Default	931 Private Lane	229-284-8858		VanessaJMalone@	Vanessa
2	John P. Davila	Default	2452 Thrash Trail	903-618-1021		JohnPDavila@dayr	John P.
3	Sonja K. Norris	Default	382 Kidd Avenue	907-832-6920		SonjaKNorris@jourr	Sonja K
4	Lauren M. Land	Default	3956 C Street	508-320-5943		LaurenMLand@rhyt	Lauren
5	Octavio S.	Default	3802 Lakeland	734-279-9108		OctavioSBenavides	Octavio
6	George C.	Default	3891 Reeves	920-799-2145		GeorgeCBenefield	George
7	Marshall B.	Default	524 Lincoln Drive	717-634-8025		MarshallBDrennen	Marsha
8	Shirley A. Leblanc	Default	1311 Rosewood	507-266-6064		ShirleyALEblanc@r	Shirley
9	George C. Wilson	Default	4425 Cameron	716-408-3024		GeorgeCWilson@rh	George
10	Michael E. Manning	Default	3240 Walkers	630-201-2081		MichaelEManning@	Michael

Back Finish

Ready.

If you see wrong data under headers then click on **Back** button and modify field associations.

Once the headers are in place then click on **Finish** button.

The import process could take time depending upon the line count of the import file.

If you would like to import a large number of customers we recommend to make a smaller import file for testing with 10-20 lines. And import only the test file first. You can easily delete 10-20 lines from the customer database if the import result is wrong.

And finally the result is here:

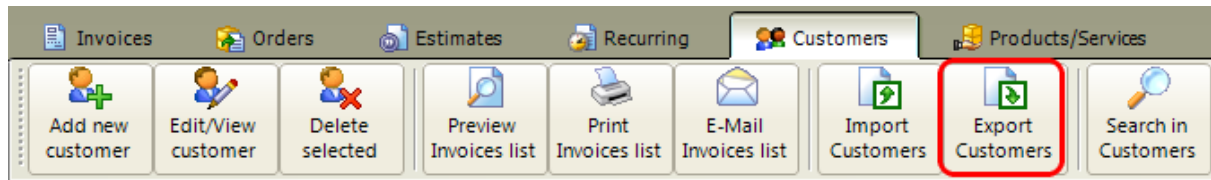
Invoices Orders Estimates Recurring Customers Products/Services Reports Settings					
Add new customer	Edit/View customer	Delete selected	Preview Invoices list	Print Invoices list	E-Mail Invoices list
Import Customers	Export Customers	Search in Customers	Refresh Customer list		

Customers					
	Customer ID	Category	Customer name	Contact person	Customer Tel.
<input type="checkbox"/>	1	Default	Vanessa J. Malone	Vanessa J. Malone	229-284-8858
<input type="checkbox"/>	2	Default	John P. Davila	John P. Davila	903-618-1021
<input type="checkbox"/>	3	Default	Sonja K. Norris	Sonja K. Norris	907-832-6920
<input type="checkbox"/>	4	Default	Lauren M. Land	Lauren M. Land	508-320-5943
<input type="checkbox"/>	5	Default	Octavio S. Benavides	Octavio S. Benavides	734-279-9108
<input type="checkbox"/>	6	Default	George C. Benefield	George C. Benefield	920-799-2145
<input type="checkbox"/>	7	Default	Marshall B. Drennen	Marshall B. Drennen	717-634-8025
<input type="checkbox"/>	8	Default	Shirley A. Leblanc	Shirley A. Leblanc	507-266-6064
<input type="checkbox"/>	9	Default	George C. Wilson	George C. Wilson	716-408-3024
<input type="checkbox"/>	10	Default	Michael E. Manning	Michael E. Manning	630-201-2081
10	Customer(s)				

7.4 Exporting Customers

At main menu click on **Customers tab**

Click on **Export Customers button** under Customers menu tab to save your customer list into CSV file.



This will save customer details (line by line) into a CSV file that can be opened with MS Excel.

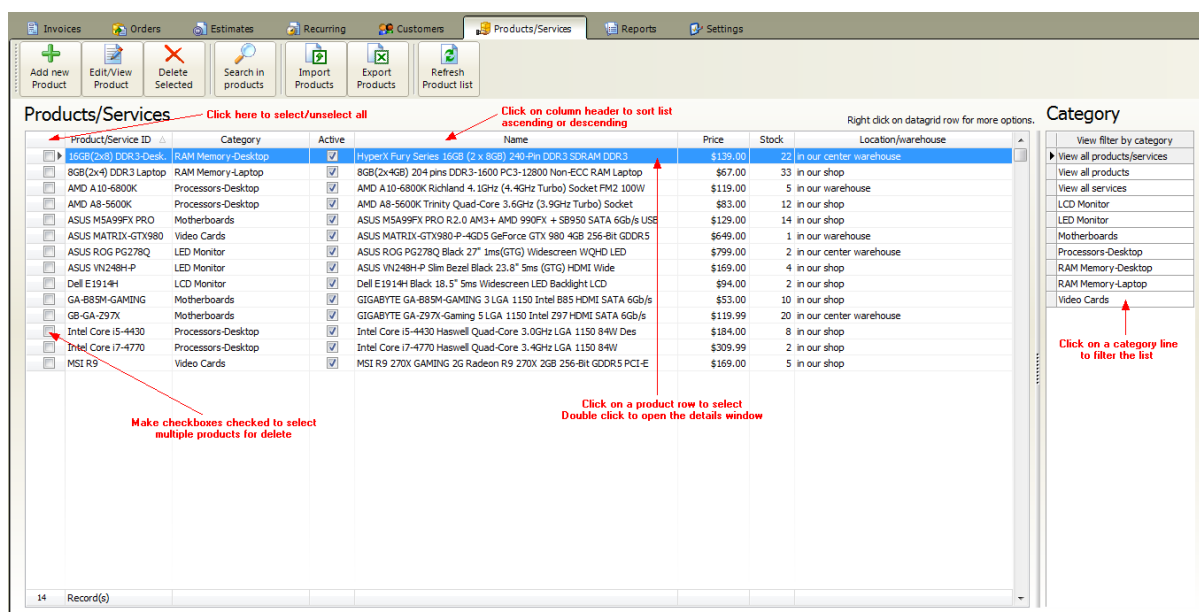
(In e-commerce CSV files are used primarily for importing and exporting products, customers to and from your store.)

Each line in a CSV file represents a customer with the details from the Customers datagrid.

8 Products/Services

At main window click on **Products/Services** tab

Products/Services menu



Under the Product/services tab you can **manage your products database** for the current company account.

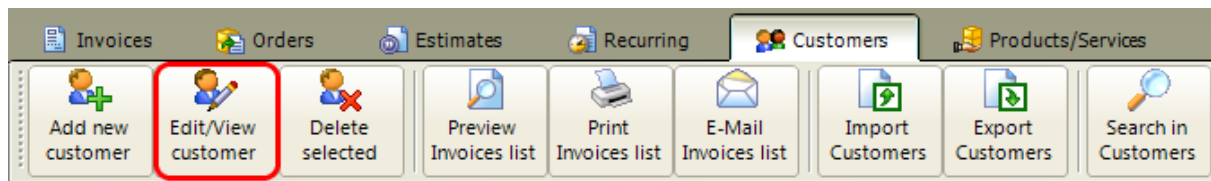
(note: You can create unlimited company accounts. Each company account has a separated products database.)

The following options available:

- [Add new product](#)
- Selecting product
- [Editing existing product](#)
- Deleting products
- [Import products list from an Excel \(.CSV\) file](#)
- [Export products list to Excel \(.CSV\) file](#)
- Search in product list
- Filtering products by category

8.1 Creating a new product

At main menu click on **Customers >> Edit/View customer**



This will open the Edit customer details window

A screenshot of the 'Add new Product/Service' window. The window has a title bar with the text 'Add new Product/Service' and a close button. Inside, there's a section titled 'Product/Service' with several input fields and checkboxes. The fields include 'Code or SKU:', 'Category:' (a dropdown menu set to 'Default'), 'Name:', 'Description:', 'Unit Price:' (set to '\$0.00'), 'Pcs/Weight:', 'Cost:' (set to '\$0.00'), and '(Price-Cost)'. There are also checkboxes for 'Status:' (checked, 'Active') and 'Taxable Tax1 rate' (checked). A checkbox labeled 'This is a service (no stock control)' is unchecked. Below it are fields for 'Stock:' (set to '0') and 'Low stock warning limit:' (set to '0'). There's also a 'Warehouse:' field. At the bottom, there's a text area for 'Private notes (not appears on invoice)'. At the very bottom of the window are 'OK' and 'Cancel' buttons.

Fields description

Code or SKU (mandatory field): alphanumeric identifier for the product or service, must be unique

Category (mandatory field): You can group products/services into categories. Just select existing category from list or enter a new one

Status: Active by default. Inactive product/service will not appear in the products list when invoicing

Name (mandatory field): the product/service name, this name is printed on invoices

Description (optional field): additional information for the product or service, this value is printed on invoices

Unit price (mandatory field): price of the product or service, enter only numbers and decimals, appears on invoices

Cost (optional field): cost of the product or service, enter only numbers and decimals, appears only on sales reports

Price-Cost : automatically calculated field

Pcs/weight (optional field): when invoicing this value is stored with the invoice line item but isn't printed

Taxable Tax1, TaxableTax2 (checkbox): make unchecked if the product/service isn't taxable

This is a service (checkbox): make checked if the product is a service and there is no inventory

Stock (optional) : the number of a product you currently have

Low Stock (optional): Get notified when your stock values are low! This value is used on "Product low stock" report

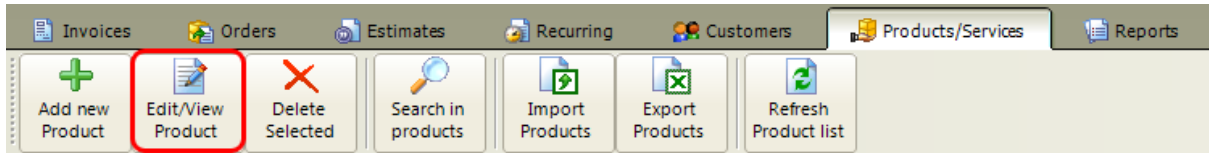
Warehouse (optional): specifies the location of the current product

Private Notes (optional field,multiple lines):Any kind of notes, not printed on invoices.

When you've entered all necessary information, click on OK button to save changes

8.2 Editing a product

1. At main menu click on **Products/Services** tab
2. **Click on the product line** to select it
3. Click on **Edit/View Product** button or double click on product line to edit



This will open the Edit Product/Service details window

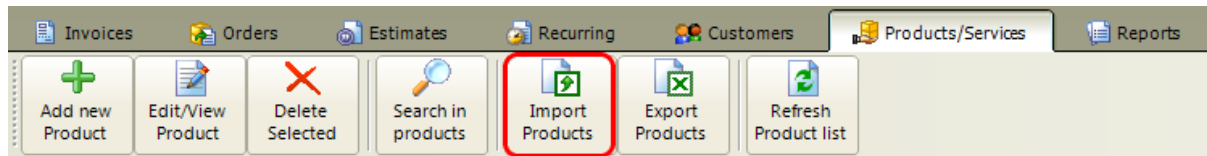
A screenshot of the 'Edit Product/Service details' window. The window has a title bar with the text 'Edit Product/Service details' and a close button. Inside, there is a 'Product/Service' section with a folder icon. The fields are as follows: 'Code or SKU' is 'Dell E1914H'; 'Status' is 'Active' with a checked checkbox; 'Category' is 'LCD Monitor' in a dropdown menu; 'Name' is 'Dell E1914H Black 18.5" 5ms Widescreen LED Backlight LCD'; 'Description' is an empty text box; 'Unit Price' is '\$94.00'; 'Pcs/Weight' is an empty text box; 'Cost' is '\$0.00'; 'Taxable Tax1 rate' is checked; '(Price-Cost)' is '\$94.00'; 'This is a service (no stock control)' is unchecked; 'Stock' is '1'; 'Low stock warning limit' is '3'; 'Warehouse' is 'in our shop'; and 'Private notes (not appears on invoice)' is an empty text area. At the bottom, there are 'OK' and 'Cancel' buttons.

[See the fields description here](#)

When you've finished editing the fields, click on OK button to save changes.

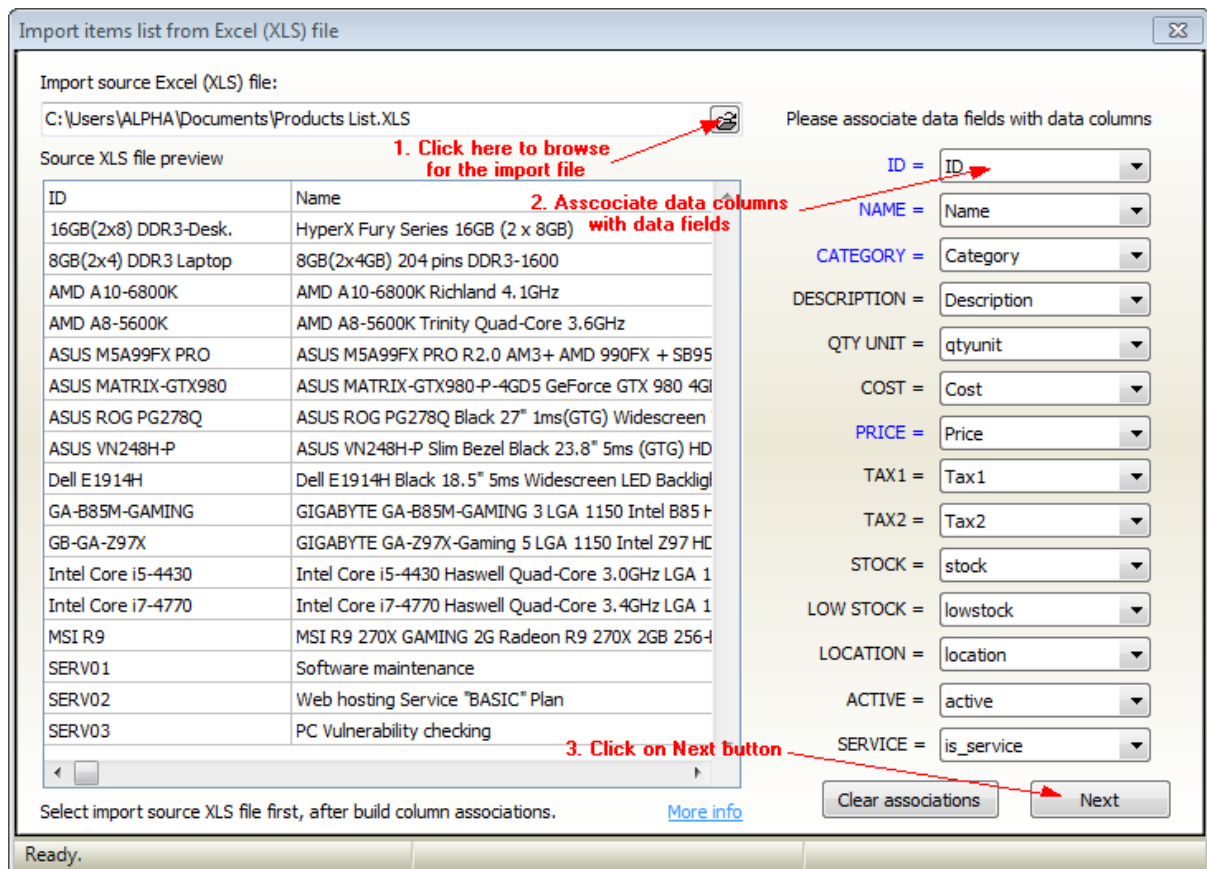
8.3 Importing Products

At main menu click on **Products/Services** tab



Click on **Import Products** button to open the import window.

Import items Step One



We recommend to use our example import file. You can download it from here.

<http://www.f-billing.com/importexample.zip>

This is a packed (ZIP) file. First you need to extract example files from the ZIP

Just fill out our example excel file with your existing products data, leave

header column names (first row) as it is and try to import.

1. Browse for the import Excel file
2. Associate database fields with data column in the excel file, use the spreadsheet preview to find which column holds the data for the corresponding field. If you do not have a column for the corresponding data in your spreadsheet just select *-Not associated-* option from the drop-down list.

If you are using our example product import file, data associations will be automatically created!

3. Click on the Next button

Import Products Step two. All data listed in the "Import Preview datagrid" will be imported to products database.

Import items list from Excel (XLS) file

Import preview

ID	Name	Category	Descriptio	Qtyunit	Cost	Price	Tax1	Tax2	Stock	Low
16GB(2x8)	HyperX	RAM	240-Pin		0	139	true	false	21	0
8GB(2x4)	8GB(2x4GB)	RAM	PC3-12800		0	67	true	false	32	0
AMD	AMD	Processors-	(4.4GHz		0	119	true	false	4	0
AMD	AMD	Processors-	(3.9GHz		0	83	true	false	11	0
ASUS	ASUS	Motherboar	AMD		0	129	true	false	13	0
ASUS	ASUS	Video Cards			0	649	true	false	1	0
ASUS ROG	ASUS ROG	LED Monitor			0	799	true	false	3	5
ASUS	ASUS	LED Monitor			0	169	true	false	6	10
Dell E1914H	Dell E1914H	LCD Monitor			0	94	true	false	1	3
GA-B85M-G	GIGABYTE	Motherboar	Intel B85,		0	53	true	false	10	0
GB-GA-Z97	GIGABYTE	Motherboar	Intel Z97,		0	119,99	true	false	18	0
Intel Core	Intel Core	Processors-			0	184	true	false	8	0
Intel Core	Intel Core	Processors-			0	309,99	true	false	1	5
MSI R9	MSI R9	Video Cards			0	169	true	false	5	0
SERV01	Software	Computer			0	45	true	false	0	0
SERV02	Web	Computer	1Gb HDD,		0	9,95	true	false		0
SERV03	PC	Computer			0	10	true	false		0

Back Finish

Ready.

If you see wrong data under headers then click on **Back** button and modify field associations.

Once the headers are in place then click on **Finish** button.

The import process could take time depending upon the line count of the import file.

If you would like to import a large number of products/items we recommend to make a smaller import file for testing with 10-20 lines. And import only the test file first. You can easily delete 10-20 lines from the products database if the import result is wrong.

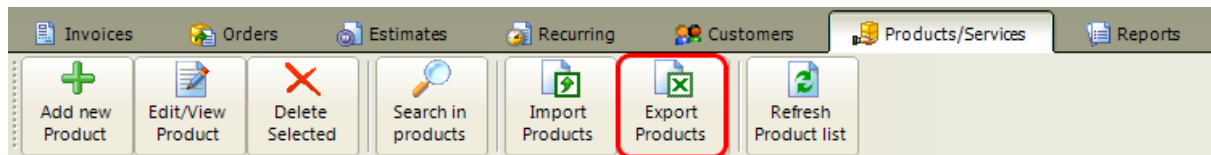
And finally the result is here:

Product/Service ID	Category	Active	Name	Price	Stock	Location/warehouse
16GB(2x8) DDR3-Desk.	RAM Memory-Desktop	<input checked="" type="checkbox"/>	HyperX Fury Series 16GB (2 x 8GB)	\$139,00	21	in our center warehouse
8GB(2x4) DDR3 Laptop	RAM Memory-Laptop	<input checked="" type="checkbox"/>	8GB(2x4GB) 204 pins DDR3-1600	\$67,00	32	in our shop
AMD A10-6800K	Processors-Desktop	<input checked="" type="checkbox"/>	AMD A10-6800K Richland 4.1GHz	\$119,00	4	in our warehouse
AMD A8-5600K	Processors-Desktop	<input checked="" type="checkbox"/>	AMD A8-5600K Trinity Quad-Core 3.6GHz	\$83,00	11	in our shop
ASUS M5A99FX PRO	Motherboards	<input checked="" type="checkbox"/>	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950 SATA 6Gb/s USB	\$129,00	13	in our shop
ASUS MATRIX-GTX980	Video Cards	<input checked="" type="checkbox"/>	ASUS MATRIX-GTX980-P-4GD5 GeForce GTX 980 4GB 256-Bit GDDR5	\$649,00	1	in our warehouse
ASUS ROG PG278Q	LED Monitor	<input checked="" type="checkbox"/>	ASUS ROG PG278Q Black 27" 1ms(GTG) Widescreen W/QHD LED	\$799,00	3	in our center warehouse
ASUS VN248H-P	LED Monitor	<input checked="" type="checkbox"/>	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG) HDMI Wide	\$169,00	6	in our shop
Dell E1914H	LCD Monitor	<input checked="" type="checkbox"/>	Dell E1914H Black 18.5" 5ms Widescreen LED Backlight LCD	\$94,00	1	in our shop
GA-B85M-GAMING	Motherboards	<input checked="" type="checkbox"/>	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel B85 HDMI SATA 6Gb/s	\$53,00	10	in our shop
GB-GA-297X	Motherboards	<input checked="" type="checkbox"/>	GIGABYTE GA-297X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s	\$119,99	18	in our center warehouse
Intel Core i5-4430	Processors-Desktop	<input checked="" type="checkbox"/>	Intel Core i5-4430 Haswell Quad-Core 3.0GHz LGA 1150 84W Des	\$184,00	8	in our shop
Intel Core i7-4770	Processors-Desktop	<input checked="" type="checkbox"/>	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W	\$309,99	1	in our shop
MSI R9	Video Cards	<input checked="" type="checkbox"/>	MSI R9 270X GAMING 2G Radeon R9 270X 2GB 256-Bit GDDR5 PCI-E	\$169,00	5	in our shop
SERV01	Computer Maintenance	<input checked="" type="checkbox"/>	Software maintenance	\$45,00	0	
SERV02	Computer Maintenance	<input checked="" type="checkbox"/>	Web hosting Service "BASIC" Plan	\$9,95		
SERV03	Computer Maintenance	<input checked="" type="checkbox"/>	PC Vulnerability checking	\$10,00		

8.4 Exporting Products

At main menu click on **Product/Services tab**

Click on **Export Products button** to save your customer list into CSV file.



This will save product/service details (line by line) into a CSV file that can be opened with MS Excel.

(In e-commerce CSV files are used primarily for importing and exporting products, customers to and from your store.)

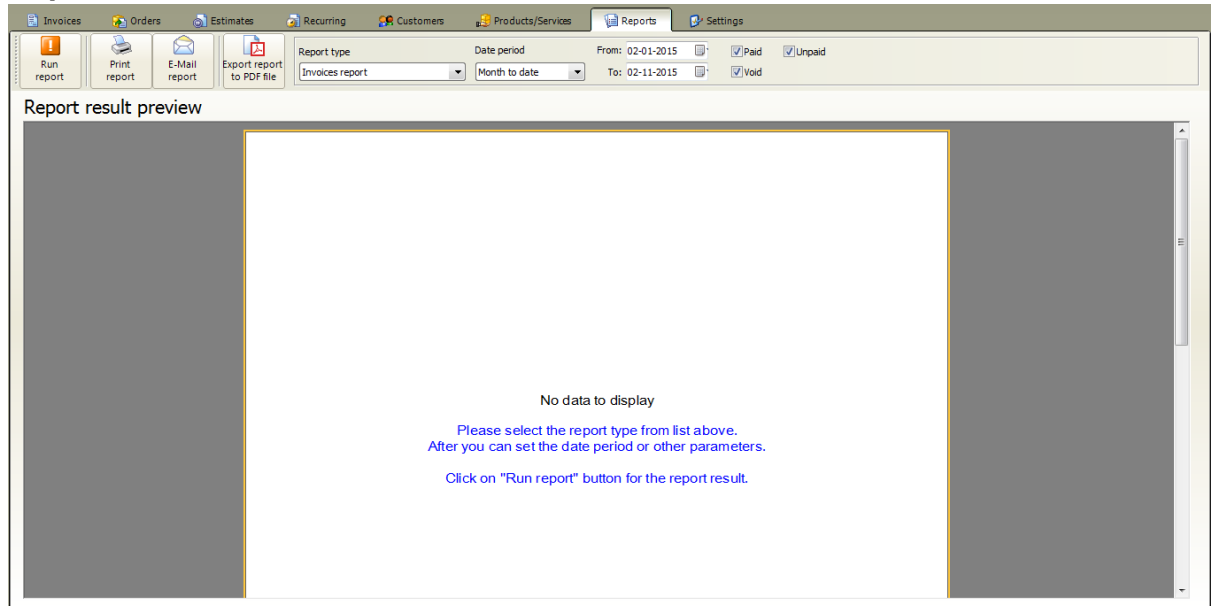
Each line in a CSV file represents a product with the details from the Products/Services datagrid.

9 Reports

At main window click on **Reports tab**

Under the reports tab you can run, print or email various reports for the current company account.

Reports menu



1. **Select report** from "**Report type**" list
2. **Setup report parameters.** Each report has it's own parameter panel.
3. Click on the **Run Report button**

Report types

[Invoices report](#)
[Invoices report with customer](#)
[Orders report](#)
[Recurring invoices](#)
[Past due invoices](#)
[Payments report](#)
[Customers list](#)
[Customers list detailed](#)
[Product/Services list](#)
[Price list](#)
[Product low stock report](#)
[Tax report Invoices](#)
[Tax report Orders](#)
[Sales Report](#)

[Sales Summary by Username](#)

9.1 Invoices report

At main window click on **Reports** tab

1. Select **Invoices report** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report** button

Invoices report example

Report result preview

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3846
 Web: www.johndoecomp.com
 555-7777-8888

Invoices Report
 Date from: 02-01-2015 Date to: 02-11-2015

No.	Date	Due date	Terms	Status	Invoice Total	Total Paid	Balance
INV0000001/2015	02-06-2015	02-06-2015		Paid	137.39	137.39	0
INV0000002/2015	02-08-2015	02-08-2015		Paid	340.89	340.89	0
INV0000003/2015	02-08-2015	02-08-2015		Paid	179.99	179.99	0
INV0000004/2015	02-08-2015	02-08-2015		Past Due	605.96	0	605.96
INV0000005/2015	02-08-2015	02-08-2015		Sent	850.94	0	850.94
INV0000006/2015	02-08-2015	02-08-2015		Past Due	977.67	0	977.67
INV0000007/2015	02-08-2015	02-08-2015		Past Due	71.36	0	71.36
INV0000008/2015	02-09-2015	02-09-2015		Sent	127.79	0	127.79
INV0000009/2015	02-10-2015	02-10-2015		Draft	0	0	0
INV0000010/2015	02-10-2015	02-10-2015		Sent	330.14	0	330.14
INV0000011/2015	02-10-2015	02-10-2015		Draft	9.95	0	9.95
INV0000012/2015	02-10-2015	02-10-2015		Past Due	21.3	0	21.3
12 Line(s)				- End of List -			
				Summary:	Invoice Total \$3 653.38	Total Paid \$658.27	Balance \$2 995.11

9.2 Invoices report with customer

At main window click on **Reports** tab

1. Select **Invoices report with customer** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report** button

Invoices report with customer example

The screenshot shows the 'Reports' tab in the software. The 'Report type' dropdown is set to 'Invoices report (with customer)'. The 'Date period' is set to 'Month to date' with a range from '02-01-2015' to '02-11-2015'. The 'Run report' button is visible on the left. The 'Report result preview' window displays the following information:

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3848
 Web: www.johndoecomp.com
 555-7777-8888

Invoices Report
 Date from: 02-01-2015 Date to: 02-11-2015

No.	Date	Due date	Customer	Status	Invoice Total	
INV0000001/2015	02-06-2015	02-06-2015	Octavio S. Benavides	Paid	137.39	
INV0000002/2015	02-08-2015	02-08-2015	Vanessa J. Malone	Paid	340.89	
INV0000003/2015	02-08-2015	02-08-2015	George C. Wilson	Paid	179.99	
INV0000004/2015	02-08-2015	02-08-2015	Michael E. Manning	Past Due	605.96	
INV0000005/2015	02-08-2015	02-08-2015	Sonja K. Norris	Sent	850.94	
INV0000006/2015	02-08-2015	02-08-2015	Octavio S. Benavides	Past Due	977.67	
INV0000007/2015	02-08-2015	02-08-2015	Marshall B. Drennen	Past Due	71.36	
INV0000008/2015	02-09-2015	02-09-2015	Octavio S. Benavides	Sent	127.79	
INV0000009/2015	02-10-2015	02-10-2015	Octavio S. Benavides	Draft	0	
INV0000010/2015	02-10-2015	02-10-2015	Lauren M. Land	Sent	330.14	
INV0000011/2015	02-10-2015	02-10-2015	George C. Wilson	Draft	9.95	
INV0000012/2015	02-10-2015	02-10-2015	John P. Davila	Past Due	21.3	
12 Line(s) - End of List -					Invoice Total	\$3 653.38

Summary: \$3 653.38

9.3 Orders report

At main window click on **Reports tab**

1. Select **Orders report** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report button**

Orders report example

Report result preview

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3846
 Web: www.johndoecomp.com
 555-7777-8888

Orders Report
 Date from: 02-01-2015 Date to: 02-11-2015

No.	Date	Due date	Customer	Status	Invoice Total
ORD010001/2015	02-10-2015	02-10-2015	George C. Wilson	Invoiced	58.52
ORD010002/2015	02-10-2015	02-10-2015	George C. Benefield	Sent	171.47
ORD010003/2015	02-10-2015	02-10-2015	Sonja K. Norris	Sent	195.96
ORD010004/2015	02-11-2015	02-11-2015	Shirley A. Leblanc	Draft	126.74
4 Line(s)			- End of List -		
			Summary:		\$552.69

9.4 Recurring invoice report

At main window click on **Reports** tab

1. Select **Recurring Invoices report** from "**Report type**" list
2. Click on the **Run Report** button

Recurring Invoices report example

The screenshot shows a software interface with a menu bar at the top containing 'Invoices', 'Orders', 'Estimates', 'Recurring', 'Customers', 'Products/Services', 'Reports', and 'Settings'. Below the menu bar is a toolbar with icons for 'Run report', 'Print report', 'E-Mail report', and 'Export report to PDF file'. A 'Report type' dropdown menu is set to 'Recurring invoices report'. The main area is titled 'Report result preview' and displays the following information:

John Doe's Computer Parts & Service
1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888

Recurring Invoices Report

Invoice No.	Customer	Next Invoice	Recurring interval	Stop after	Invoice Total
INV0000011/2015	George C. Wilson	03-10-2015	1 Month(s)	Stop date not set	9.95
INV0000012/2015	John P. Davila	02-24-2015	14 Day(s)	2015.12.31	21.3
2 Line(s) - End of List -					Total \$31.25

9.5 Past due invoices

At main window click on **Reports** tab

1. Select **Past due Invoices report** from "**Report type**" list
2. Click on the **Run Report** button

Past due invoices report example

The screenshot shows the 'Reports' tab in the software interface. The 'Report type' dropdown is set to 'Past due Invoices'. The 'Run report' button is highlighted. The report preview shows the following data:

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3646
 Web: www.johndoecomp.com

Past Due Invoices Report

No.	Date	Due date	Terms	Overdue days	Invoice Total	Total Paid	Balance
0 to 30 days							
INV0000004/2015	02-08-2015	02-08-2015		3	605.96	0	605.96
INV0000005/2015	02-08-2015	02-08-2015		3	850.94	0	850.94
INV0000006/2015	02-08-2015	02-08-2015		3	977.67	0	977.67
INV0000007/2015	02-08-2015	02-08-2015		3	71.36	0	71.36
INV0000008/2015	02-09-2015	02-09-2015		2	127.79	0	127.79
INV0000009/2015	02-10-2015	02-10-2015		1	47.93	0	47.93
INV000010/2015	02-10-2015	02-10-2015		1	330.14	0	330.14
7 Invoice(s)				Subtotal:	\$3 011.79	\$0.00	\$3 011.79
31 to 60 days							
0 Invoice(s)				Subtotal:	\$0.00	\$0.00	\$0.00
61 to 90 days							
0 Invoice(s)				Subtotal:	\$0.00	\$0.00	\$0.00
Over 90 days							
0 Invoice(s)				Subtotal:	\$0.00	\$0.00	\$0.00
Total Invoice(s)				End of list	Total	Payments	Balance

9.6 Payments report

At main window click on **Reports** tab

1. Select **Payments report** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report** button

Payments report example

The screenshot shows a software interface with a top menu bar containing 'Invoices', 'Orders', 'Estimates', 'Recurring', 'Customers', 'Products/Services', 'Reports', and 'Settings'. Below the menu is a toolbar with icons for 'Run report', 'Print report', 'E-Mail report', and 'Export report to PDF file'. The 'Reports' tab is active, showing a 'Report type' dropdown set to 'Payments report', a 'Date period' dropdown set to 'Month to date', and date range fields 'From: 02-01-2015' and 'To: 02-12-2015'. Below this is a 'Report result preview' section. It displays the business name 'John Doe's Computer Parts & Service' and its address: '1537 Roosevelt Road, Moundridge, KS 67107, Phone: 620-253-3646, Web: www.johndoecomp.com, 555-7777-8888'. To the right, it says 'Payments Report' and 'Date from: 02-01-2015 Date to: 02-12-2015'. A table follows with columns: 'Invoice No.', 'Invoice issue date', 'Customer', 'Payment ID', 'Payment date', 'Paidby', and 'Amount Paid'. The table contains four rows of payment data. At the bottom, it shows '4 Line(s)', '- End of List -', and a 'Summary' row with a total amount of '\$729.63'.

Invoice No.	Invoice issue date	Customer	Payment ID	Payment date	Paidby	Amount Paid
INV0000001/2015	02-06-2015	Octavio S. Benavides	1	02-11-2015	Cash	\$137.39
INV0000002/2015	02-08-2015	Vanessa J. Malone	2	02-11-2015	PayPal	\$340.89
INV0000003/2015	02-08-2015	George C. Wilson	3	02-11-2015	Credit Card	\$179.99
INV0000007/2015	02-08-2015	Marshall B. Drennen	4	02-12-2015	American Express	\$71.36
4 Line(s)			- End of List -		Summary:	\$729.63

9.7 Customers list

At main window click on **Reports** tab

1. Select **Customers list** from "Report type" list
2. Choose a **customer category**
3. Click on the **Run Report** button

Customers list report example

The screenshot shows the 'Reports' tab in the software interface. The 'Report type' dropdown is set to 'Customers list', and the 'Select customer category' dropdown is set to 'All customers'. The 'Run report' button is highlighted. Below the report controls, the 'Report result preview' area displays a table titled 'Customers List' for 'John Doe's Computer Parts & Service'.

Customer ID	Category	Customer business name	Contact person	Tel	Fax
6	Default	George C. Benefield	George C. Benefield	920-799-2145	
9	Default	George C. Wilson	George C. Wilson	716-408-3024	
2	Default	John P. Davila	John P. Davila	903-618-1021	
4	Default	Lauren M. Land	Lauren M. Land	508-320-5943	
7	Default	Marshall B. Drennen	Marshall B. Drennen	717-634-8025	
10	Default	Michael E. Manning	Michael E. Manning	630-201-2081	
5	Default	Octavio S. Benavides	Octavio S. Benavides	734-279-9108	
8	Default	Shirley A. Leblanc	Shirley A. Leblanc	507-266-6064	
3	Default	Sonja K. Norris	Sonja K. Norris	907-832-8920	
1	Default	Vanessa J. Malone	Vanessa J. Malone	229-284-8658	

10 Line(s) - End of List -

9.8 Customer list detailed

At main window click on **Reports** tab

1. Select **Customers list (detailed)** from "**Report type**" list
2. Choose a **customer category**
3. Click on the **Run Report** button

Customers list detailed report example

Report result preview

John Doe's Computer Parts & Service **Customers detailed list**

Category: Default	
Billing information: Name: George C. Benefield Address: 3891 Reeves Street Milwaukee, WI 53202 Contact person: George C. Benefield Tel: 920-799-2145 Fax: E-Mail: GeorgeCBenefield@rhyta.com	Shipping information: Name: George C. Benefield Address: 3891 Reeves Street Milwaukee, WI 53202 Contact person: George C. Benefield Tel: 920-799-2145 Fax: Tax exempt: No
Billing information: Name: George C. Wilson Address: 4425 Cameron Road Buffalo, NY 14209 Contact person: George C. Wilson Tel: 716-408-3024 Fax: E-Mail: GeorgeCWilson@rhyta.com	Shipping information: Name: George C. Wilson Address: 4425 Cameron Road Buffalo, NY 14209 Contact person: George C. Wilson Tel: 716-408-3024 Fax: Tax exempt: No
Billing information: Name: John P. Davila Address: 2452 Thrash Trail Longview, TX 75601 Contact person: John P. Davila Tel: 903-618-1021 Fax: E-Mail: JohnPDavila@dayrep.com	Shipping information: Name: John P. Davila Address: 2452 Thrash Trail Longview, TX 75601 Contact person: John P. Davila Tel: 903-618-1021 Fax: Tax exempt: No
Billing information: Name: Lauren M. Land Address: 1068 P Street	Shipping information: Name: Lauren M. Land Address: 1068 P Street Tax exempt: No

9.9 Product list

At main window click on **Reports** tab

1. Select **Product/Services list** from "**Report type**" list
2. Choose a **product category**
3. Click on the **Run Report** button

Product list report example

The screenshot shows the 'Reports' tab in the F-Billing Revolution 2015 software. The 'Report type' is set to 'Products/Services list' and the 'Select category' is 'All products and services'. The 'Run report' button is highlighted. Below the report preview, a table titled 'John Doe's Computer Parts & Service' displays a list of products and services with columns for Product ID, Category, Product/Service name, Description, Warehouse, Stock, Cost, and Price.

Product ID	Category	Product/Service name	Description	Warehouse	Stock	Cost	Price
SERV03	Computer Maintenance	PC Vulnerability checking				\$0.00	\$10.00
SERV01	Computer Maintenance	Software maintenance			0	\$0.00	\$45.00
SERV02	Computer Maintenance	Web hosting Service "BASIC" Plan	1Gb HDD, 50Gb Bandwidth, 1 domain name			\$0.00	\$9.95
Dell E1914H	LCD Monitor	Dell E1914H Black 18.5" 5ms Widescreen LED Backlight LCD		in our shop	1	\$0.00	\$94.00
ASUS ROG PG278Q	LED Monitor	ASUS ROG PG278Q Black 27" 1ms (GTG) Widescreen WQHD LED		in our center warehouse	0	\$0.00	\$799.00
ASUS VN248H-P	LED Monitor	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG) HDMI Wide		in our shop	3	\$0.00	\$169.00
ASUS M5A99FX PRO	Motherboards	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950 SATA 6Gb/s USB	AMD 990FX, FX / Phenom II / Athlon II	in our shop	13	\$0.00	\$129.00
GA-B85M-GAMING	Motherboards	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel B85 HDMI SATA 6Gb/s USB	Intel B85, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 1600/1333	in our shop	10	\$0.00	\$53.00
GB-GA-Z97X	Motherboards	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s	Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 1600/1333	in our center warehouse	18	\$0.00	\$119.99
AMD A10-6800K	Processors-Desktop	AMD A10-6800K Richland 4.1GHz	(4.4GHz Turbo) Socket FM2 100W	in our warehouse	4	\$0.00	\$119.00
AMD A8-5600K	Processors-Desktop	AMD A8-5600K Trinity Quad-Core 3.6GHz	(3.9GHz Turbo)	in our shop	11	\$0.00	\$83.00
Intel Core i5-4430	Processors-Desktop	Intel Core i5-4430 Haswell Quad-Core 3.0GHz LGA 1150 84W Des		in our shop	8	\$0.00	\$184.00
Intel Core i7-4770	Processors-Desktop	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 84W		in our shop	0	\$0.00	\$309.99

9.10 Price list

At main window click on **Reports** tab

1. Select **Price list** from "**Report type**" list
2. Choose a **product category**
3. Click on the **Run Report** button

Price list report example

John Doe's Computer Parts & Service **Price list**

Product ID	Product/Service name	Description	Unit Price
Computer Maintenance			
SERV03	PC Vulnerability checking		\$10.00
SERV01	Software maintenance		\$45.00
SERV02	Web hosting Service "BASIC" Plan	1Gb HDD, 50Gb Bandwidth, 1 domain name	\$9.95
LCD Monitor			
Dell E1914H	Dell E1914H Black 18.5" 5ms Widescreen LED Backlight LCD		\$94.00
LED Monitor			
ASUS ROG PG278Q	ASUS ROG PG278Q Black 27" 1ms (GTG) Widescreen WQHD LED		\$799.00
ASUS VN248H-P	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG) HDMI Wide		\$169.00
Motherboards			
ASUS M5A99FX PRO	ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950 SATA 6Gb/s USB	AMD 990FX, FX / Phenom II / Athlon II	\$129.00
GA-B85M-GAMING	GIGABYTE GA-B85M-GAMING 3 LGA 1150 Intel B85 HDMI SATA 6Gb/s	Intel B85, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 1600/1333	\$53.00
GB-GA-Z97X	GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI SATA 6Gb/s	Intel Z97, Core i7 / i5 / i3 / Pentium / Celeron (LGA1150), DDR3 3200(OC)/3100(OC)	\$119.99

9.11 Product low stock

At main window click on **Reports** tab

1. Select **Products low stock report** from "**Report type**" list
2. Click on the **Run Report** button

Product low stock report example

The screenshot shows the 'Reports' tab in the software interface. The 'Report type' dropdown is set to 'Products low stock report'. Below the dropdown are checkboxes for 'Active' and 'Inactive', both of which are checked. The 'Run report' button is highlighted. The 'Report result preview' section displays a table titled 'Products low stock report' for 'John Doe's Computer Parts & Service'.

Product ID	Category	Product name	Warehouse	Low stock limit	Stock
Dell E1914H	LCD Monitor	Dell E1914H Black 18.5" 5ms Widescreen LED Backlight LCD	in our shop	3	1
ASUS ROG PG278Q	LED Monitor	ASUS ROG PG278Q Black 27" 1ms (GTG) Widescreen WQHD LED	in our center warehouse	5	3
ASUS VN248H-P	LED Monitor	ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG) HDMI Wide	in our shop	10	6
Intel Core i7-4770	Processors-Desktop	Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150 64W	in our shop	5	1

4 Line(s)
- End of List -

9.12 Tax Report (Invoices)

At main window click on **Reports** tab

1. Select **Tax report (Invoices)** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report** button

Tax report (invoices) example

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3848
 Web: www.johndoecomp.com
 555-7777-8888

TAX Report (Invoices)
 Date from: 02-01-2015 Date to: 02-12-2015

Invoice No.	Issue Date	Due date	Total Before TAX	TAX1	TAX2	Invoice Total
INV0000001/2015	02-06-2015	02-06-2015	\$129.00	\$8.39	\$0.00	\$137.39
INV0000002/2015	02-08-2015	02-08-2015	\$306.00	\$19.89	\$0.00	\$340.89
INV0000003/2015	02-08-2015	02-08-2015	\$169.00	\$10.99	\$0.00	\$179.99
INV0000004/2015	02-08-2015	02-08-2015	\$568.98	\$36.98	\$0.00	\$605.96
INV0000005/2015	02-08-2015	02-08-2015	\$799.00	\$51.94	\$0.00	\$850.94
INV0000006/2015	02-08-2015	02-08-2015	\$918.00	\$59.67	\$0.00	\$977.67
INV0000007/2015	02-08-2015	02-08-2015	\$67.00	\$4.36	\$0.00	\$71.36
INV0000008/2015	02-09-2015	02-09-2015	\$119.99	\$7.80	\$0.00	\$127.79
INV0000009/2015	02-10-2015	02-10-2015	\$45.00	\$2.93	\$0.00	\$47.93
INV0000010/2015	02-10-2015	02-10-2015	\$309.99	\$20.15	\$0.00	\$330.14
10 Line(s)	- End of List -		Total Before TAX	TAX1	TAX2	Invoice Total
			Summary: \$3 431.96	\$223.10	\$0.00	\$3 670.06

9.13 Tax Report (Orders)

At main window click on **Reports** tab

1. Select **Tax report (Orders)** from "**Report type**" list
2. Select the **date range**
3. Click on the **Run Report** button

Tax report (Orders) example

Report result preview

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3848
 Web: www.johndoecomp.com
 555-7777-8888

TAX Report (Orders)
 Date from: 02-01-2015 Date to: 02-12-2015

Order No.	Issue Date	Due date	Total Before TAX	TAX1	TAX2	Order Total
ORD010001/2015	02-10-2015	02-10-2015	\$54.95	\$3.57	\$0.00	\$58.52
ORD010002/2015	02-10-2015	02-10-2015	\$161.00	\$10.47	\$0.00	\$171.47
ORD010003/2015	02-10-2015	02-10-2015	\$184.00	\$11.96	\$0.00	\$195.96
ORD010004/2015	02-11-2015	02-11-2015	\$119.00	\$7.74	\$0.00	\$126.74
4 Line(s)	- End of List -		Total Before TAX	TAX1	TAX2	Order Total
	Summary:		\$518.95	\$33.74	\$0.00	\$552.69

9.14 Sales report

At main window click on **Reports tab**

1. Select **Sales report** from "**Report type**" list
2. Choose a **product**
3. Select the **date range**
4. Click on the **Run Report button**

Sales report example

The screenshot shows the 'Report result preview' window. At the top, there's a toolbar with icons for 'Run report', 'Print report', 'E-Mail report', and 'Export report to PDF file'. Below the toolbar, the 'Report type' is set to 'Sales Report', 'Select Product/Service' is 'ASUS M5A99FX PRO R2.0 AM3+ A...', and the date range is 'From: 02-01-2015 To: 02-12-2015'. The main content area displays the report details for 'John Doe's Computer Parts & Service'. It includes the company name, address, phone, web, and a phone number. The report title is 'Sales Report' with dates 'Date from: 02-01-2015' and 'Date to: 02-12-2015'. The product/service ID is 'ASUS M5A99FX PRO' and the name is 'ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950 SATA 6Gb/s USB'. A table shows the report data with columns for Date, Quantity, Cost, Income, and Profit. The table has two rows of data for the dates 02-06-2015 and 02-08-2015. Below the table, there's a summary section with 'Total Quantity', 'Total Cost', 'Total Income', and 'Total Profit'.

John Doe's Computer Parts & Service
1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888

Sales Report
Date from: 02-01-2015
Date to: 02-12-2015

Product/Service ID : ASUS M5A99FX PRO
Name : ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950 SATA 6Gb/s USB

Date	Quantity	Cost	Income	Profit
02-06-2015	1.00	\$0.00	\$129.00	\$129.00
02-08-2015	1.00	\$0.00	\$129.00	\$129.00

2 Line(s) - End of List -

Summary: Total Quantity 2.00 Total Cost \$0.00 Total Income \$258.00 Total Profit \$258.00

9.15 Sales report by username

At main window click on **Reports** tab

1. Select **Sales summary by Username** from "**Report type**" list
2. Choose a **user**
3. Select the **date range**
4. Click on the **Run Report** button

Sales report (by username) example

The screenshot shows the 'Reports' window in F-Billing Revolution 2015. The 'Report type' is set to 'Sales summary by Username', the 'Select User' is 'Administrator', and the date range is 'From: 02-01-2015 To: 02-12-2015'. The 'Run report' button is highlighted.

Report result preview

John Doe's Computer Parts & Service
 1537 Roosevelt Road
 Moundridge, KS 67107
 Phone: 620-253-3646
 Web: www.johndoecomp.com
 555-7777-8888

Sales Report by User
 Date from: 02-01-2015
 Date to: 02-12-2015

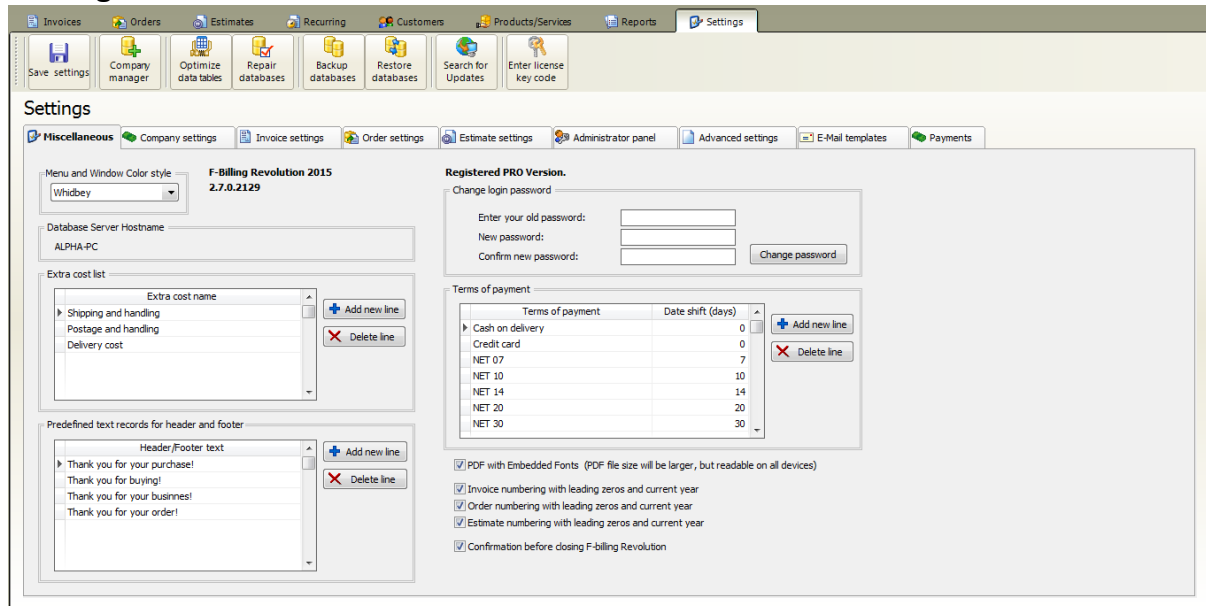
User name: Administrator

Product/Service Name	Date	Quantity	Cost	Income	Profit	
ASUS M5A99FX PRO R2.0 AM3+ AMD 990FX + SB950	02-08-2015	2.00	\$0.00	\$258.00	\$258.00	
Dell E1914H Black 18.5" 5ms	02-08-2015	1.00	\$0.00	\$94.00	\$94.00	
AMD A8-5600K Trinity Quad-Core 3.6GHz	02-08-2015	1.00	\$0.00	\$83.00	\$83.00	
ASUS VN248H-P Slim Bezel Black 23.8" 5ms (GTG)	02-08-2015	1.00	\$0.00	\$169.00	\$169.00	
HyperX Fury Series 16GB (2 x 8GB)	02-08-2015	1.00	\$0.00	\$139.00	\$139.00	
ASUS ROG PG278Q Black 27" 1ms(GTG) Widescreen	02-08-2015	2.00	\$0.00	\$1598.00	\$1598.00	
AMD A10-6800K Richland 4.1GHz	02-08-2015	1.00	\$0.00	\$119.00	\$119.00	
8GB(2x4GB) 204 pins DDR3-1600	02-08-2015	1.00	\$0.00	\$67.00	\$67.00	
GIGABYTE GA-Z97X-Gaming 5 LGA 1150 Intel Z97 HDMI	02-09-2015	2.00	\$0.00	\$239.98	\$239.98	
Intel Core i7-4770 Haswell Quad-Core 3.4GHz LGA 1150	02-10-2015	2.00	\$0.00	\$619.98	\$619.98	
Software maintenance	02-10-2015	1.00	\$0.00	\$45.00	\$45.00	
11 Line(s)	- End of List -					
Summary:	Total Quantity	15.00	Total Cost	\$0.00	Total Income	\$3 431.96
					Total Profit	\$3 431.96

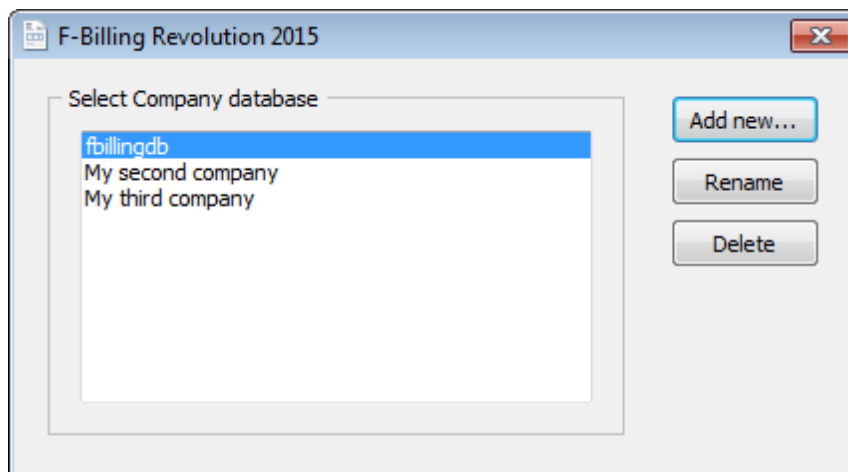
10 Settings

At main menu click on **Settings tab**

Settings menu



Company Manager: You can create unlimited company profiles. Each company profile comes with separated customers, products, invoices, orders, estimates, users and settings. This is useful if you have multiple companies or if you need to create invoices in multiple currencies. P.E (one company profile for USD invoices, and another for EUR invoices etc.)



"fbillingdb" is the default database. You can create unlimited additional database

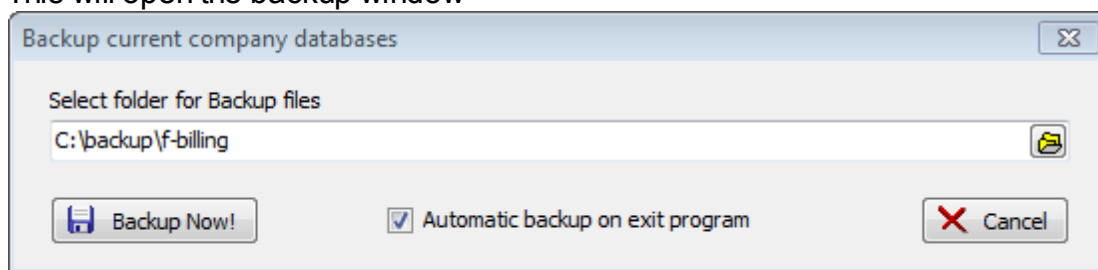
Optimize databases: this function will compress and re-index your database for faster

access. If you have a lot (thousands) of data records, optimizing your database tables regularly will improve f-billing performance.

Repair databases: We recommend to use this function after a power failure or Windows crash occurs. It will do garbage collection and re-index the database. Our database system is highly resistant to corruption. If an application crash, or a Windows operating-system crash, or even a power failure occurs in the middle of a transaction, the partially written transaction should be automatically rolled back the next time the database file is accessed.

Backup databases:

This will open the backup window



1. Browse a folder for your backup files
2. Click on backup now button to create a database backup from your current company profile

Automatic backup on exit program: We strongly recommend to make it checked and f-billing will automatically create database backup file to the backup folder when you close the billing application. The backup progress is very fast it takes only 1-2 seconds.

Restore databases: You can restore a previous f-billing backup file for the current company profile. **The existing databases in the current company profile will be overwritten!** Just browse for your backup file after click on Open button

Search for updates: Click on this button to check for new updates. If there are any updates to install, f-billing will automatically download and install the update.

Enter license key code: Find the license key in your email that you have received after purchasing the SOLO or PRO version.

Fill in the text boxes with name and license key. Click "OK" and you will successfully upgrade to the full version.

10.1 Miscellaneous

At main menu click on **Settings >> Miscellaneous** tab

Miscellaneous

Menu and Window color style: pick a color scheme for overall appearance

Extra cost list: This list explains the extra cost names most commonly used on invoices.

Predefined text records for header and footer: Define most commonly used header or footer lines here

Change login password: The logged in user can change his password here. For more info see the Settings menu >> [Administrator panel](#)

Terms of payment: This list explains the payment terms most commonly used on invoices.

PDF with Embedded fonts: we recommend to make it checked, PDF attachment files will be readable almost all devices

Invoice numbering with leading zeros and current year: the next invoice number will be in following format:

Checkbox is checked: (invoice prefix + invoice number 6 digits with leading zeros / current year) Example: INV000001/2015

Checkbox is unchecked: (invoice prefix + invoice number) Example: INV1

Order numbering with leading zeros and current year: the next order number will be in following format:

Checkbox is checked: (order prefix + order number 6 digits with leading zeros / current year) Example: ORD000001/2015

Checkbox is unchecked: (order prefix + order number) Example: ORD1

Estimate numbering with leading zeros and current year: the next estimate number will be in following format:

Checkbox is checked: (estimate prefix + estimate number 6 digits with leading zeros / current year) Example: EST000001/2015

Checkbox is unchecked: (estimate prefix + estimate number) Example: EST1

10.2 Company settings

At main menu click on **Settings >> Company settings** tab

Company settings

Company name: your company name or personal name

Company address: your company address, tel, fax or web address goes here

Company address: your company email address goes here

Sales tax reg. no. (optional): sales tax registration number or any other identifier

Currency group-box: select or enter your currency, select or enter the currency sign and select the decimal separator.

Click on "SET CURRENCY" button to apply the settings

Date format: select your date format from drop-down list

yyyy - year value 4 digits, **mm** - month value 2 digits, **dd** - day value 2 digits

Tax1 name and rate: default tax1 name and rate (for example: TAX1,VAT,GST ,PST)

Tax2 name and rate: default tax2 name and rate (TAX2,VAT,GST ,PST)

Company logo: company logo image (appears on invoices, estimates and orders) .
Print logo image: Make unchecked if you don't want to print company logo. (BMP,JPG or PNG image files accepted)

When you've finished editing the fields, click on "Save settings" toolbar button.

10.3 Invoice settings

At main menu click on **Settings >> Invoice settings** tab

Invoice settings

Invoice settings window showing various configuration options for invoices, including invoice prefix, starting number, header background color, and a preview of the invoice template.

Default invoice template: The [invoice template](#) that is set for new invoices (you can change it per invoice) You can preview the look of the selected template

Invoice prefix: Invoice numbers may optionally be prefixed with a group of letters (P.E invoice number may be: INV101)

Starting invoice number: if there are no invoices recorded yet then this will be the first invoice number

Customize invoice text labels: if you would like to change the various texts that appear on the printed invoice, modify these values.

Predefined terms and conditions text: the default terms and conditions text that is set for new invoices (you can change it per invoice)

When you've finished editing the fields, click on "Save settings" toolbar button.

10.4 Order settings

At main menu click on **Settings >> Order settings** tab

Order settings

Default order template: The order template that is set for new orders (you can change it per order) You can preview the look of the selected template

Order prefix: Order numbers may optionally be prefixed with a group of letters (P.E order number may be: ORD10001)

Starting order number: if there are no orders recorded yet then this will be the first order number

Customize order text labels: if you would like to change the various texts that appear on the printed order, modify these values.

Predefined terms and conditions text: the default terms and conditions text that is set for new orders (you can change it per order)

When you've finished editing the fields, click on "Save settings" toolbar button.

10.5 Estimate settings

At main menu click on **Settings >> Estimate settings** tab

Estimate settings

Estimate# prefix: EST

Starting estimate number: 200001

Header box background color: Default

Customize Estimate text labels:

- Estimate
- Estimate#
- Estimate Date
- Due Date
- Estimate To
- Estimate Total

Default Estimate template (example, click on preview for mouse scrolling): Professional 1 (logo on left side)

Title text goes here...

John Doe's Computer Parts & Computer Service

1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646
Web: www.johndoecomp.com
555-7777-8888

Estimate#	EST1/2015
Estimate Date	02-08-2015
Due Date	02-23-2015

Estimate

Predefined terms and conditions text for estimates

Restore defaults

Default estimate template: The estimate template that is set for new estimates (you can change it per estimate) You can preview the look of the selected template.

Estimate prefix: Estimate numbers may optionally be prefixed with a group of letters (P.E estimate number may be: EST10001)

Starting estimate number: if there are no estimates recorded yet then this will be the first estimate number

Customize estimate text labels: if you would like to change the various texts that appear on the printed estimate, modify these values.

Predefined terms and conditions text: the default terms and conditions text that is set for new estimates (you can change it per estimate)

When you've finished editing the fields, click on "Save settings" toolbar button.

10.6 Administrator panel

At main menu click on **Settings tab >> Administrator panel tab**

Under the Administrator panel you can create new users or modify user permissions for the current company account.

You can create unlimited additional users. The "Administrator" is the default user and cannot be modified or deleted. Administrator panel visible only if the "Administrator" user logged in. For other users this panel isn't available. It means only the administrator user can add new users, delete existing users or change user permissions.

The password for the "Administrator" user can be modified.

If the display log-in screen option is enabled, the software asks for username and password.

Passwords are user and company account specific. If you have multiple company accounts you can setup different users and different passwords for each company account.

Administrator Panel

The screenshot shows the 'Administrator panel' tab selected in the settings menu. At the top, there are tabs for 'Miscellaneous', 'Company settings', 'Invoice settings', 'Order settings', 'Estimate settings', 'Administrator panel', and 'Advanced settings'. The 'Administrator panel' tab is active.

Below the tabs, there is a checkbox labeled 'Display Login screen at startup (Initial password is: demo)' which is checked.

The main area is divided into two sections:

- User Accounts:** A listbox titled 'Select username to modify permissions' contains 'Administrator' and 'Jane Doe'. Below the listbox are two buttons: '+ Add new User' and 'X Delete User'.
- User profile:** This section is for editing the 'Jane Doe' user profile. It includes:
 - Username: 'Jane Doe' (text input)
 - Password: masked with dots (text input)
 - Confirm password: masked with dots (text input)
 - A 'Save User profile' button.
 - User permissions:** A grid of checkboxes for various actions:
 - Create invoices, Delete invoices, Void invoices, Mark invoices as Paid
 - Create orders, Delete orders, Turn orders into invoices
 - Create estimates, Delete estimates, Turn estimates into invoices
 - Create customers, Delete customers
 - Create products/services, Delete products/services
 - Run reports, Generate recurring invoices
 - Under Settings menu tab:** A grid of checkboxes:
 - Modify invoice settings, Modify order settings, Modify estimate settings

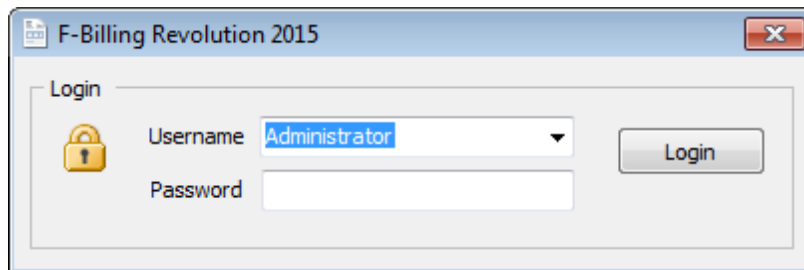
How to setup user login:

1. Make the **"Display Login screen at startup"** checkbox checked to prevent the billing software from unauthorized access.
2. Select a username from the listbox or click on the **"Add new user"** button to create a new user for the current company database.

3. Fill out the "password" and "confirm password" fields for the selected user. **Keep in mind the new password.** (the default password is: **demo**)
4. (optional) Setup permissions for the selected user. Administrator user permissions cannot be modified.
5. Click on the **"Save user profile"** button

After restarting the billing software, the system displays the **Login screen**. When you select a valid user and enter its associated password, the main screen is displayed.

Login Screen



Note: If you cannot log-in with your password, please try with the default password: demo. When it fails, please contact with [f-billing support](#).

10.7 Advanced settings

At main menu click on **Settings >> Advanced settings** tab

Advanced settings


Template advanced settings

Template	Page size	Right Margin (mm)	'Invoice to' block position shift (mm)	
Professional 1 (logo on left side)	Letter	10	Left: 0	Top: 0
Professional 2 (logo on right side)	Letter	10	Left: 0	Top: 0
Simplified 1 (logo on left side)	Letter	10	Left: 0	Top: 0
Simplified 2 (logo on right side)	Letter	10	Left: 0	Top: 0
Business Classic	Letter	10	Left: 0	Top: 0

By positioning 'Invoice to' block, the customer name/address can be displayed in right place in the windowed envelope. If you networking, you need to setup this on all computer.
Example: (Left : 20 and Top: 10 means that shift 'Invoice to' block to right 20mm and shift down 10mm) Original position Left: 0 Top: 0

Professional 1 (logo on left side) Selected template preview (example, click on preview for mouse scrolling)

Title text goes here...

 YOUR SLOGAN HERE
COMPANY

John Doe's Computer Parts & Computer Service
1537 Roosevelt Road
Moundridge, KS 67107
Phone: 620-253-3646

Page size: select the paper size for each template (A4 or Letter size)

Right margin: you can adjust the default right margin for each template

'Invoice to' block position: you can adjust the position of the 'Invoice to' block for each invoice template (except the "business classic" template)

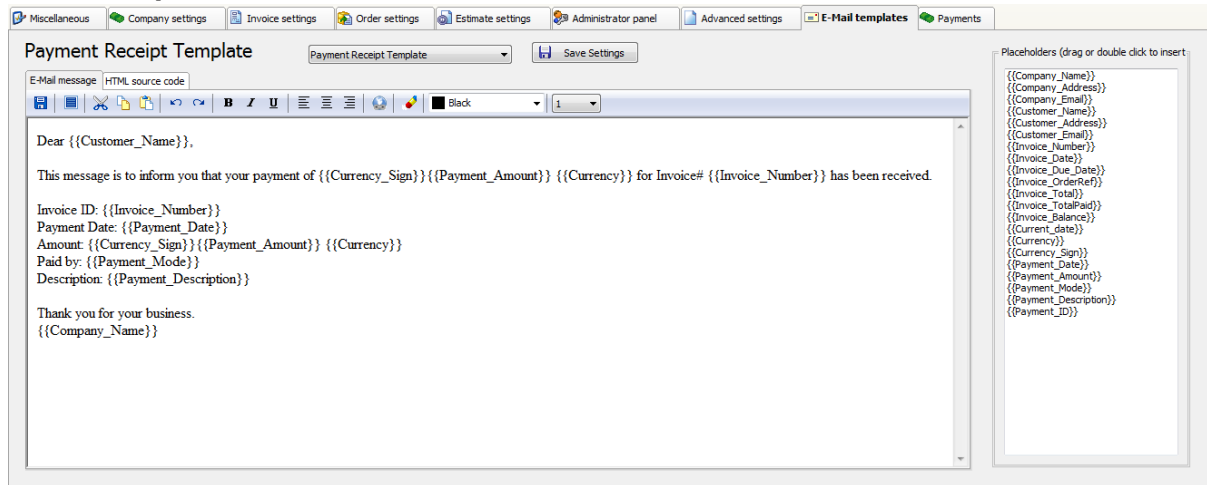
It means the customer name/address block can be displayed in right place in the windowed envelope

When you've finished editing the fields, click on "Save settings" button.

10.8 Email templates

At main menu click on **Settings >> E-mail templates** tab

Email templates



Under this tab you can create and edit email body messages for invoices, orders, estimates and payment receipts.

1. Select the template you want to edit from the email template list
2. Enter your message body text to the Email template tab, you can use the toolbar to format your text.
Advanced users can use the HTML code tab to edit HTML code directly
3. Insert placeholders into the message text by selecting from the placeholder list.
Placeholders will be replaced with the corresponding values when emailing

When you've finished editing the email message text, click on "Save settings" button.

10.9 Payments tab

At main menu click on **Settings >> Payments** tab

Payments settings

The screenshot shows the 'Payments' settings window. At the top, there are tabs: Miscellaneous, Company settings, Invoice settings, Order settings, Estimate settings, Administrator panel, Advanced settings, E-Mail templates, and Payments. The 'Payments' tab is active. Below the tabs, there are four checkboxes:

- ☐ Show "PAID" image on fully paid invoices
- ☐ Insert PayPal "Pay Now" button with the remaining balance on unpaid PDF invoices
- ☐ Send payment receipt email after payment recorded
- ☐ Attach updated invoice to payment receipt email

 Below these are two main sections. The first is 'Payment Receipt Text Labels' with input fields for:

- Payment Receipt (with a dropdown menu)
- Payment for Invoice #
- Amount received from:
- Description:
- Payment Received in:
- Payment Receipt #

 The second section is 'PAID Image for Invoices (max: 40mm X 25mm)' which shows a preview of a red 'PAID' stamp and buttons for 'Load logo image...' and 'Restore Default'. Below that is the 'PayPal image for Invoices (max: 40mm X 10mm)' section showing a preview of a yellow 'Pay Now' button and buttons for 'Load button image...' and 'Restore Default'. A 'Restore defaults' button is also at the bottom of the text labels section.

Show "Paid" image on fully paid invoices: make it checked if you would like to display a "PAID" or other logo on fully paid invoices. Invoices only with "Paid" status will display "paid" logo. Use the "Mark invoice as paid" button when invoicing and make checked the "Paid in full and close the invoice" option to change the invoice status to "Paid"

Send Payment Receipt email after each payment recorded: automatically generates the payment receipt and opens the payment receipt email window after a payment record added for the current invoice. Optionally **you can attach the invoice with updated balance to the payment receipt** email. You can customize the payment receipt email body under the [Email templates](#) tab

Insert PayPal "Pay Now" button: make it checked if you would like to display a "Pay Now" button on unpaid or partly paid invoices. Your customer can pay instantly with PayPal for the remaining invoice balance. **You need a PayPal business account** to use this function and after you need to **setup PayPal settings by clicking PayPal toolbar button under the invoice email window.**

PAID image for invoices: you can use your own paid logo image, just click on **load logo image** button and browse for your image file (BMP, JPG or PNG image files accepted).

You can restore the build-in paid logo image by clicking on "Restore default" button

PayPal image for invoices: you can use your own button image for PayPal payment

button, just click on **load button image** button and browse for your image file (BMP, JPG or PNG image files accepted). You can restore the build-in PayPal button image by clicking on "Restore default" button

Payment receipt text labels: if you would like to change the various texts that appear on the printed invoice, modify these values.

When you've finished editing the fields, click on "Save settings" toolbar button.