T-Invoicer User Guide

Introduction

T-Invoicer is an entry level invoicing system designed for small & startup business's who need to invoice customers quickly & easily. T-Invoicer has all the basic requirements necessary to operate your business until you begin needing a full featured accounting system.

T-Invoicer's interface is very intuitive, as you work right on the invoice itself as it would print. Setting up the layout initially can be done in a just few minutes, with a sample record included, that helps you fill out the layout for your business.

System Requirements

Windows 2000 (Service Pack 4), Windows XP (Service Pack 2)
Pentium III 500MHz or higher
256MB of RAM
CD or DVD drive and hard disk drive
SVGA (800 x 600) or higher resolution video adapter and display

Installation

Step 1: Download the installer from the link emailed to you, or insert the T-Invoicer CD-Rom into your CD-Rom drive & double click the "Setup_T-Invoicerxxx.exe" installer file.

Step 2: Click Next to read the License Agreement . Check the "I accept the agreement" to continue.

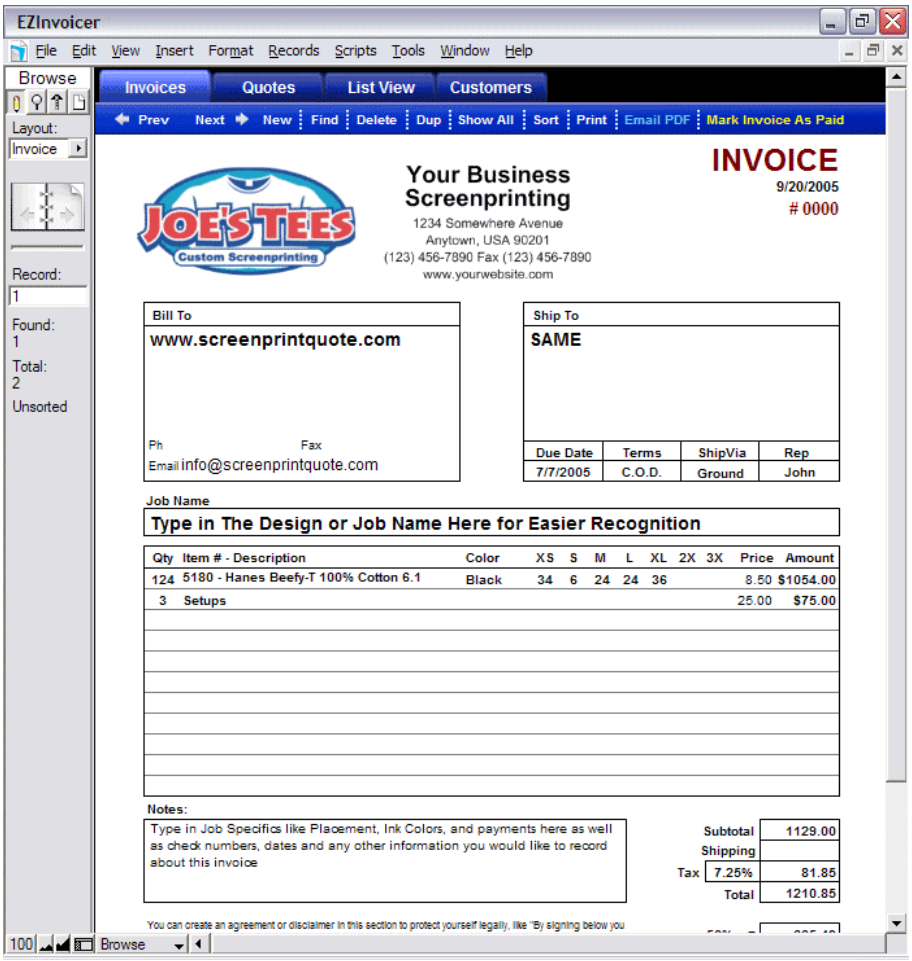
Step 3: Click Next to read important information about the software.

Step 4: Click Next to select where to save the program shortcuts. By default it will save to the Start Menu. If you would like to save to a different location, Click Browse, navigate to where you want to save, and click OK.

Step 5: Click Next to Select Additional Tasks. Check the boxes if you would like to create desktop or quick launch icons.

Step 6: Click Next to review your installation settings, and then click Install to begin the installation. The files will then be copied onto your computer. You will then be shown the Quick User Guide, click next to check whether or not to run the software. You are finished!

Setting Up Your Invoice Layout



Company Name & Address

To Add your Company Name to the layout, position the cursor over "Your Company Name", and click on it to bring up the text cursor, and type your company name.

TIP: You can format your name by highlighting the text, selecting the Format menu, and modifying any of the formatting values. Choose a custom font, change the size, add a style, or choose a font color.

Inserting your Logo

To add your logo, simply right click on the logo area of the layout and select "Insert Picture..." Navigate to your logo file and select (T-Invoicer will recognize most graphic formats). You can select the "store only a reference to the file" option if you wish, however, if you move your file from its original location, T-Invoicer will not be able to display it.

Tax Rate

You can customize the tax rates available in the tax drop down menus for your states tax rate. To do this, click on the tax rate field and select "Edit" from the drop down menu. A window will pop up to add or edit your tax rate values. You can either edit existing rates or add them to the list. To add a value to the list, click in the box to bring up the cursor, and press the right arrow key until the cursor is at the end of the last value, hit the return key, and type in your tax rate, (Make sure to keep your decimal in the correct position) and click "OK".

Deposit Rate

You can customize the percentage of deposit that you require from your customers. To do this, click on the deposit field and select "Edit" from the drop down menu. A window will pop up to add or edit your deposit rate values. You can either edit existing rates or add them to the list. To add a value to the list, click in the box to bring up the cursor, and press the right arrow key until the cursor is at the end of the last value, hit the return key, and type in your deposit rate, (Make sure to keep your decimal in the correct position) and click "OK".

Agreement

Create a customized agreement at the bottom of the layout for your customer to sign. To do this, highlight the sample text (above the customer signature line) and type in your agreement. It is not necessary, but if decide not to use it, you should leave that space empty.

T-Invoicer Basics

How T-Invoicer saves a file

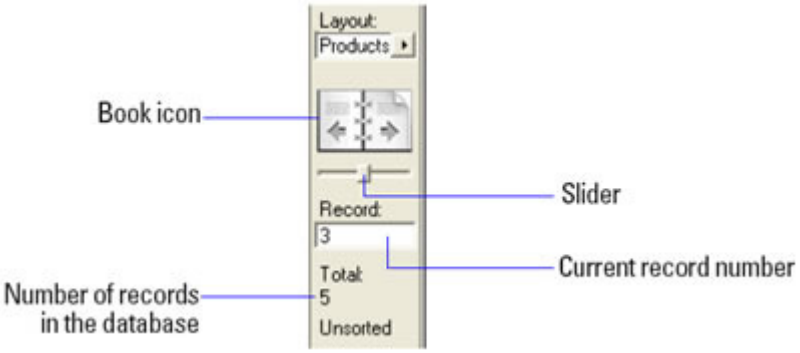
T-Invoicer automatically saves your information as you work. However, The following actions do not cause the file to be saved.

- Displaying a different record or layout

- Sorting records or modifying a sort order
- Performing find operations such as Find, Show All Records, Omit Record, or modifying a find request
- Changing the position and size of windows or hiding/showing the status area

Moving through records

To move from one record to another, use the book icon in the status area



To Move:	Do This:
To the next record in the current screen	Click the right page of the book icon
To the previous record in the current screen	Click the left page of the book icon
Quickly to a specific record	Click the current record number, type the record number you want, then press Enter.
	Press Esc, type the record number, then press Enter
	Choose Records menu > Go to Record > Specify, then type the number of the record.
Quickly through records	Drag the slider right or left to move forward or backward.
Through records in List View	Use the scroll bar on the right side of the window.

Creating Invoices

See the section on Creating a New Invoice or Quote

Duplicating Invoices

When you duplicate invoices, T-Invoicer stores the new invoice at the end of the open invoices. In Browse mode, you see the new record after the current record,

or after the last record in the found set. (the set of records made active by a find request). If records are sorted, the new record appears immediately after the current record. If records are unsorted, the new record appears after the last record in the found set.

To:	Do This:
Add a new blank record	Choose Records menu > New Record . You see a blank record with one field selected.
Quickly add a record with the same or similar data as an existing record	Select the record to duplicate. Then, choose Records menu > Duplicate Record.

Deleting an Invoice or Quote Record

To delete an invoice or quote record, click the "Delete" button on the blue bar at the to of the screen. The invoice or quote number will be deleted along with it, but you can still use again in another record. Note: After deleting a record, it cannot be undone!

Finding Invoices or Quotes

See the section on Finding Invoice, Quote or Customer Records

Creating a New Invoice or Quote

Creating a New Invoice Record

To create a new invoice, go to the Invoice screen by clicking the "INVOICE" tab at the top of the screen, then click the NEW button, in the blue bar at the top of the invoice page. A new invoice record will be created, an invoice number will be generated, and the current date added to the invoice (You can modify the current date or invoice number by clicking on it's field, and editing it's value).

Creating a New Quote Record

To create a new Quote, go to the Quote screen by clicking the "QUOTE" tab at the top of the screen, then click the NEW button, in the blue bar at the top of the invoice page. A new quote record will be created, a quote number will be generated, and the current date added to the quote (You can modify the current date or quote number by clicking on it's field, and editing it's value).

Bill To

Position the mouse just underneath "Bill To" in the box below, and click to show a drop down menu of the customers saved in your customer address book. To add a new Customer, see the section on Adding Customers. When you select a customer from the drop down menu, the rest of the customer information will be automatically added to the layout, and any changes to the customer record will update automatically on the layout as well.

Adding a Ship To

For Customers that have the same Ship To Address as the Bill To, select SAME. Otherwise type the address of the ship to in the Ship To box.

Due Date

To record a due date on the invoice, click the field and a drop down calendar will display.

Terms

Clicking in this field will bring up a drop down menu, to select payment terms for your customer. There is an edit button at the bottom of the menu to customize your payment term options.

Ship Via

Clicking in this field will bring up a drop down menu, to select a shipping method for your customer. There is an edit button at the bottom of the menu to customize your shipping method options.

Rep

Use this field to indicate the sales representative for this invoice or account. Clicking in this field will bring up a drop down menu, to select a sales rep. There is an edit button in the drop menu to customize your list.

Job Name

Use this field to give this particular invoice/job a name to use for easier reference.

Invoice line

Each invoice line is comprised of the following fields, Position the mouse underneath one of the following fields on an invoice line and click to create/edit:

Qty

Type in the quantity for that product or service on an invoice line.

Item # - Description

Add an item part number and/or product description or service description in this field. Type it in once, and T-Invoicer will remember it, so long as you use it once on an invoice line on any record you have. When an Item No or Description is used, it is available in the drop down menu that pops up the next time you click this field.

Price

Enter the unit cost or hourly rate of the product or service for that invoice line in this field.

Amount

The Amount will automatically by calculated by T-Invoicer.

Shipping

Enter the shipping cost in this field, if applicable.

Tax

Select the Tax Rate if applicable. The amount will be automatically calculated.

Deposit

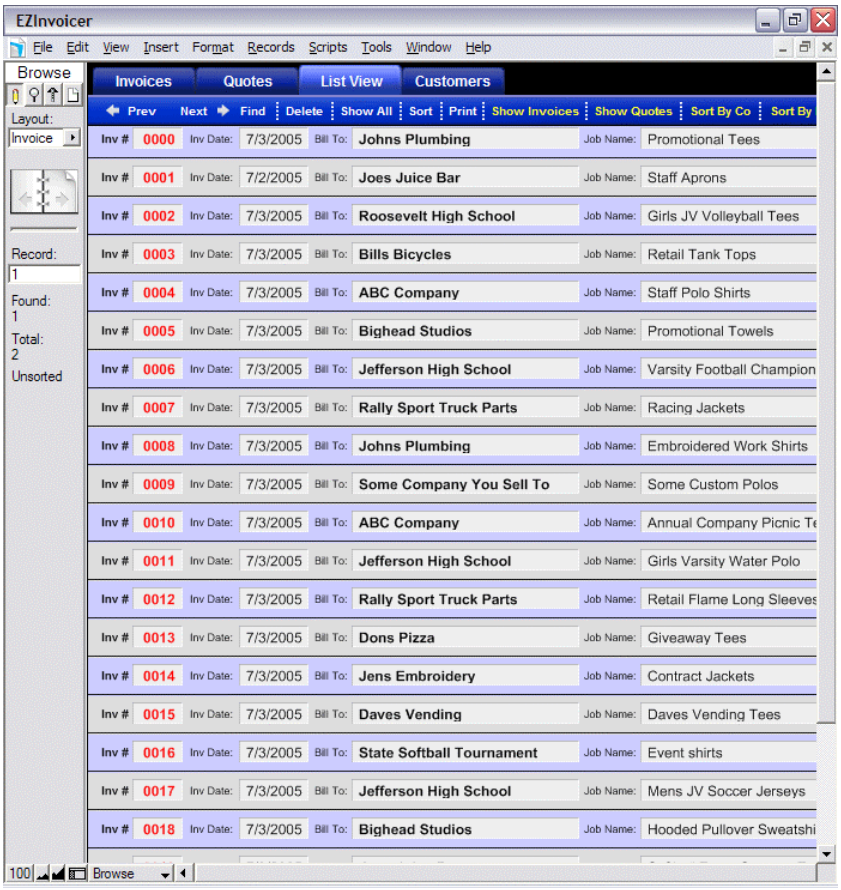
Enter the amount of the deposit payment paid by your customer in this field.
TIP:Type in the date you received the deposit and/or check no in the Notes field.

Notes

Type in any job specifics, special instructions or notes to the customer in this field. Use this area also to save payment information such as check number, payment date, etc.

Using List View

Click on the "LIST VIEW" tab to show all your invoice and quote records saved in T-Invoicer in a list view format. This view is helpful to quickly browse through all your records, as well as allowing you to sort and search through them. At the bottom of the screen, there are totals for tax charges and balance due to give you the ability to create simple reports.



TIP: Clicking in between the fields in each record will take you to that respective invoice or quote record in Layout view.

TIP: For help with your tax preparation, perform a find for all invoices in a tax period by entering a date range in the date field in find mode. Then click on "Show Invoices" and T-Invoicer will show you a total of all the sales taxes you've charged at the bottom of the screen!

Finding Invoice, Quote or Customer Records

Perform a find by clicking on the FIND button, in the blue navigation bar at the top of the screen. This will bring T-Invoicer into find mode, where a single blank

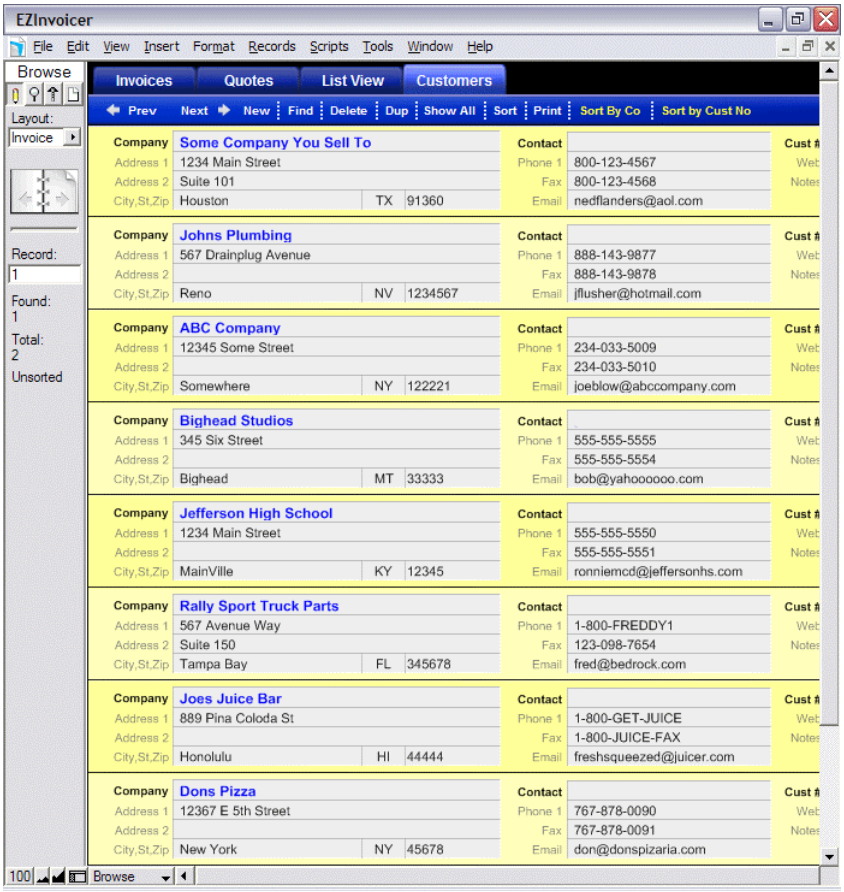
record will be displayed. You can enter in search criteria in any available field on this blank find page. After you've entered your search criteria, click the FIND button on the left sidebar, and the resulting records will be displayed.

If no records are found, T-Invoicer will ask you to modify your find, you can either try different search criteria or press Cancel. To view all records saved in T-Invoicer click the Show All button in the blue navigation bar.

TIP: You can use the symbols menu on the side bar to help you perform complex, specific searches.

Creating a New Customer

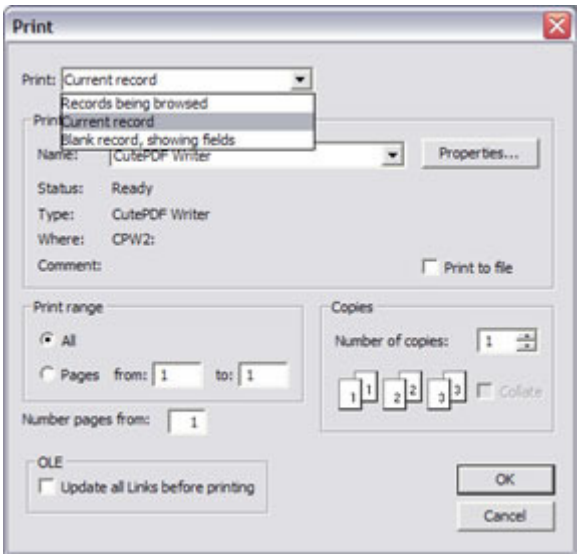
To add a new customer, click the Customers tab at the top of the screen. Then, click the "New" button in the blue navigation bar to create a new customer. Clicking the new button will automatically generate a new customer number.



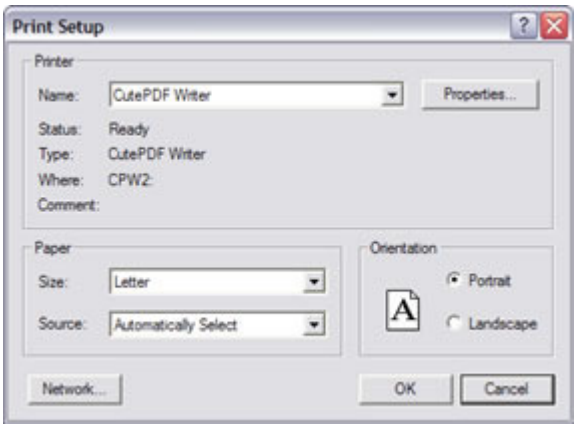
In the Customers screen, your customers are in a list view format. They can be sorted by customer name and customer number, by clicking on the respective buttons in the blue bar at the top of the screen.

Printing Your Invoice

Choose print setup in the file menu and make sure that the page orientation is set to portrait and the page size is set to letter.



To print your invoice or quote, click the print button on the blue bar at the top of the screen. A standard print window will pop up for you to review your print settings.



Note: If you want to print only the current invoice you are viewing, make sure to select "current record" in the print window setup, otherwise if "records being browsed" is selected, all records in the found set will print!

Importing Records from an Earlier Version

Follow these easy steps to import data from a previous version:

1. First open the older version, then go to the File menu and select: "Save A Copy...."

2. In the "Save a Copy" dialog box, navigate to the T-Invoicer folder inside your Program Files where the new version is stored, and save into the "Old_Files" folder inside.

3. Open the new version, click the "Import" button at the top-right of the Invoice screen, and you’re done!

Installing the PDF Driver

Download the PDF Driver from the ultimatebizsoft.com download page.

Double click the file to extract a folder containing the installer. Then, open the folder and double click the Setup.exe shortcut.

This file will install a virtual printer called "schubec PS Printer" that T-Invoicer works with to create PDF files. It is necessary only if you want to output or email PDF files.

Next, it will install the required Ghostscript PDF driver, if it's not already installed on your system.

That's all there is to it, you're ready to PDF!

Emailing PDF Files

With T-Invoicer, clicking the Email PDF button at the top right of the screen will create a PDF file of the current invoice or quote and automatically attach it to a new email, with the address and subject filled in.

However there are two requirements to meet in order for T-Invoicer to do so:

1. The PDF Driver is downloaded & installed.

2. You email through a standard desktop email software like outlook, outlook express, thunderbird etc..

If you email through a web-based account, such as Yahoo or Hotmail, you can still output a PDF file, but you will need to manually attach the file.

Simply press the PDF to desktop button, or print the file using the "schubec PS Printer" in the print setup.

Contact Us

For technical support and latest updates, visit us at **ultimatebizsoft.com**

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