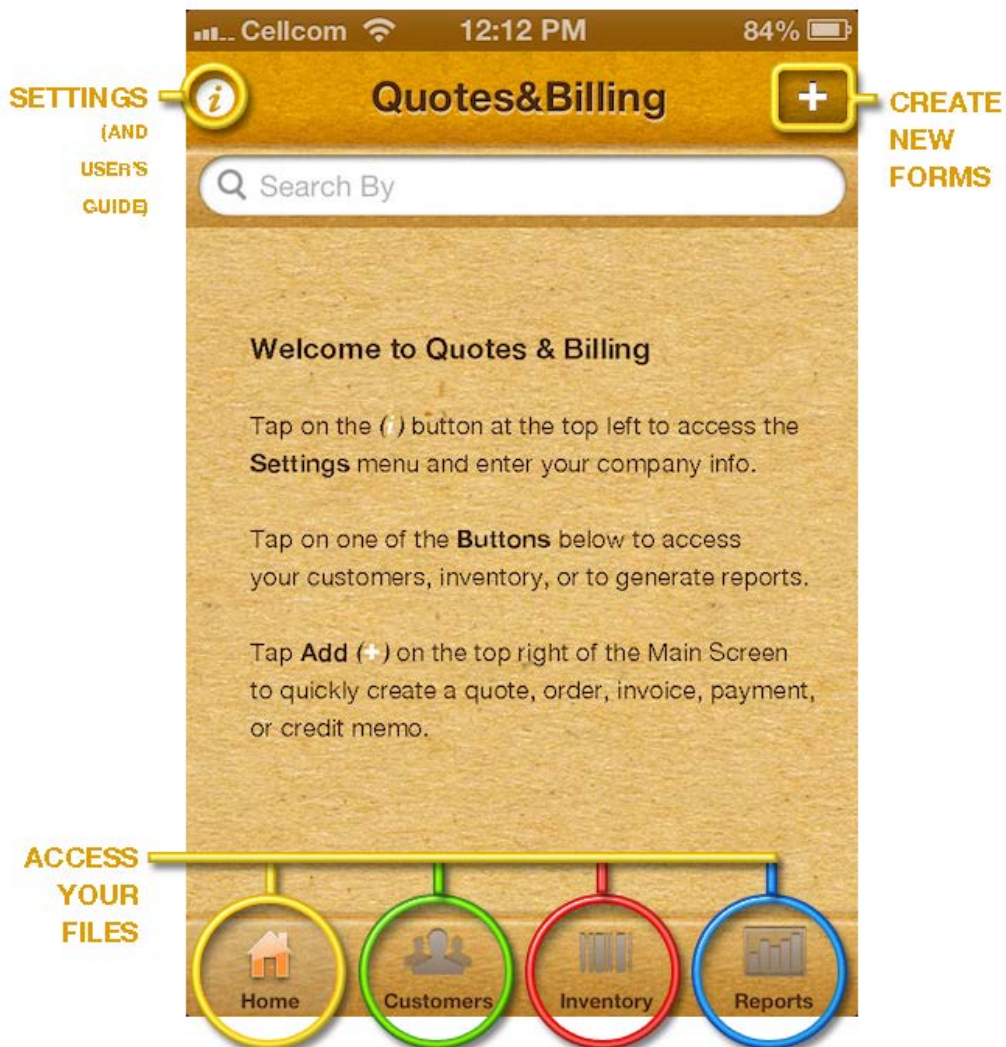




Using QUOTES & BILLING

QUICK START...

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



GETTING STARTED

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

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

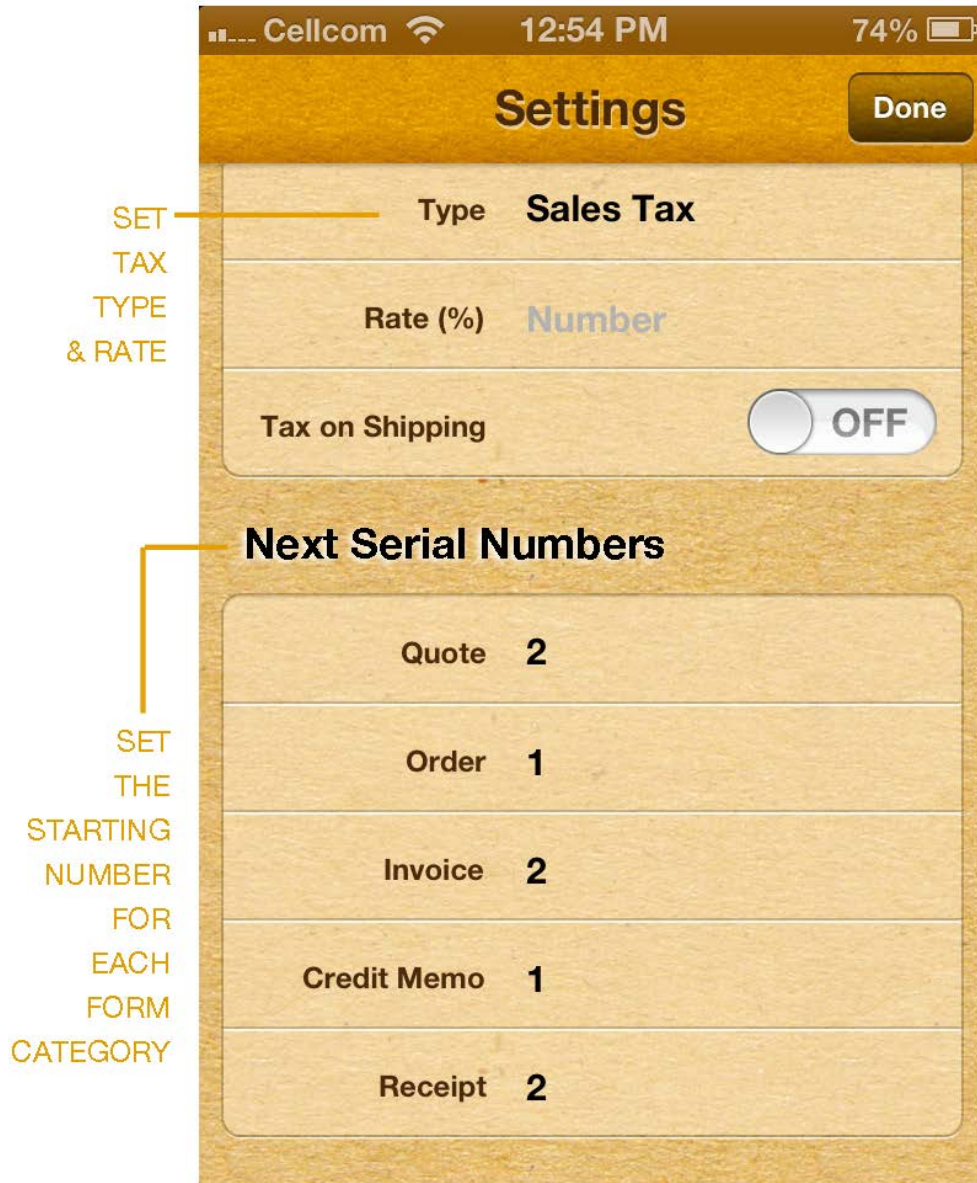


STEP3: Enter the basic information on your company.

The screenshot shows an iPhone Settings app interface. At the top, the status bar displays 'Cellcom', signal strength, Wi-Fi, the time '8:37 PM', and '31%' battery. The app title is 'Settings' with a 'Done' button in the top right. Below the title is a logo that says 'Powered by Quotes And Billing'. The main section is titled 'Business Contact' and contains five input fields, each with a 'Number' placeholder:

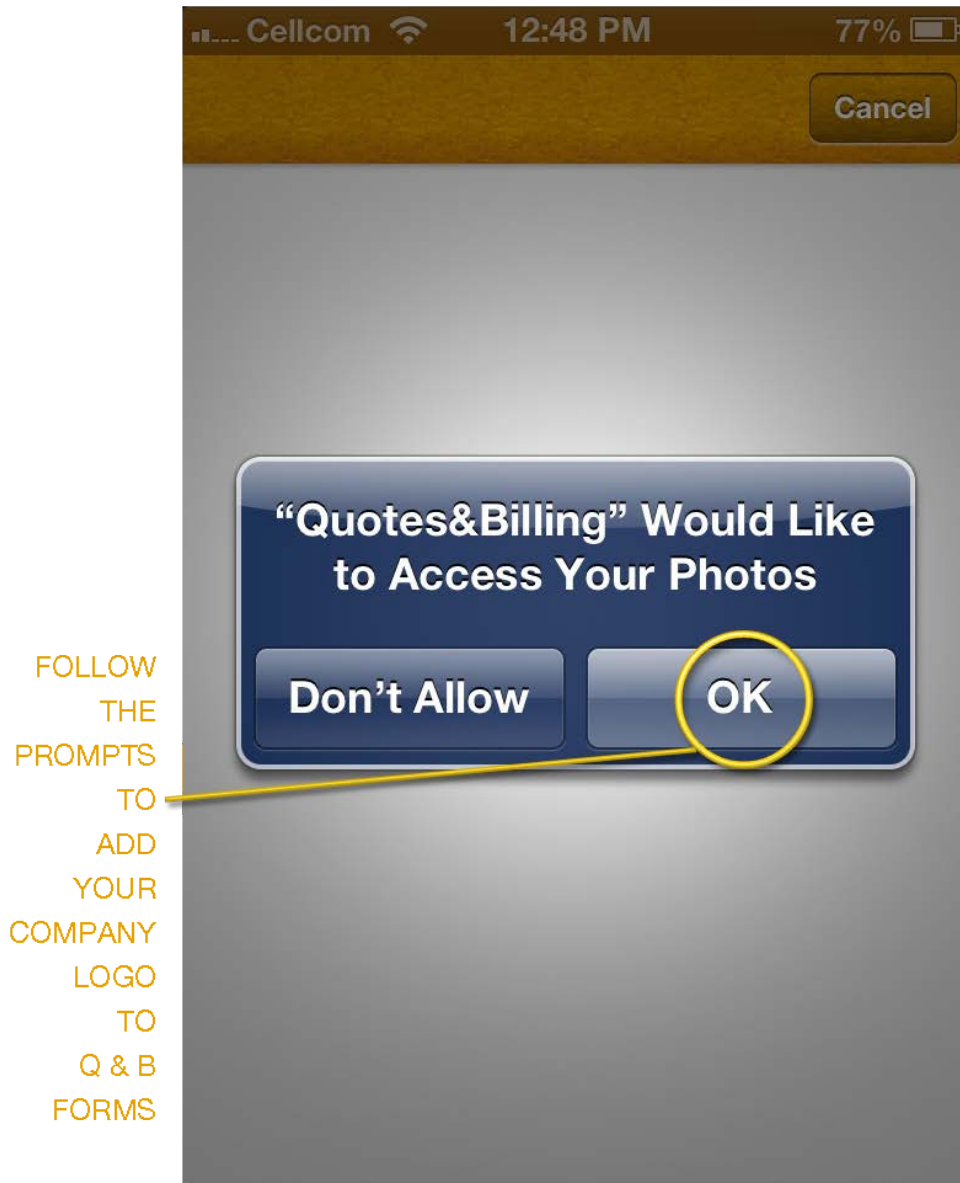
Name	Number
Phone	Number
Fax	Number
eMail	Number
Web Site	Number

Below this section is the heading 'Business Address' followed by an empty input field.



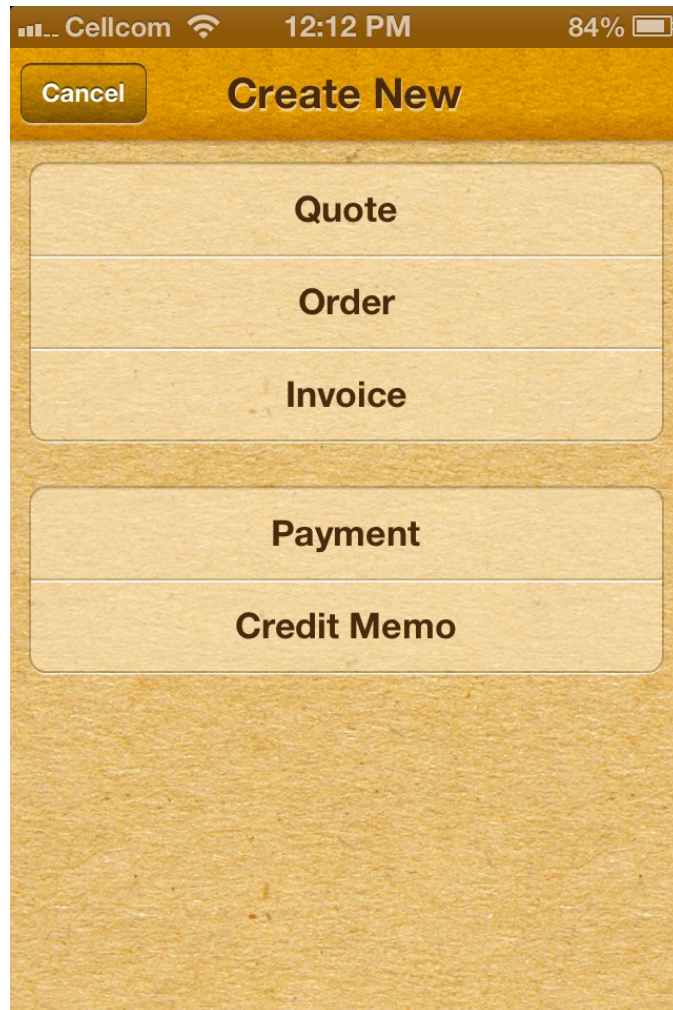
STEP 3: Enter your **TAX TYPE** (e.g. Sales Tax, V.A.T.) and enter the **TAX RATE**.
(NOTE: If there is tax on shipping, then switch the “**SHIPPING ON TAXABLE**” to “**YES**”).

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



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

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

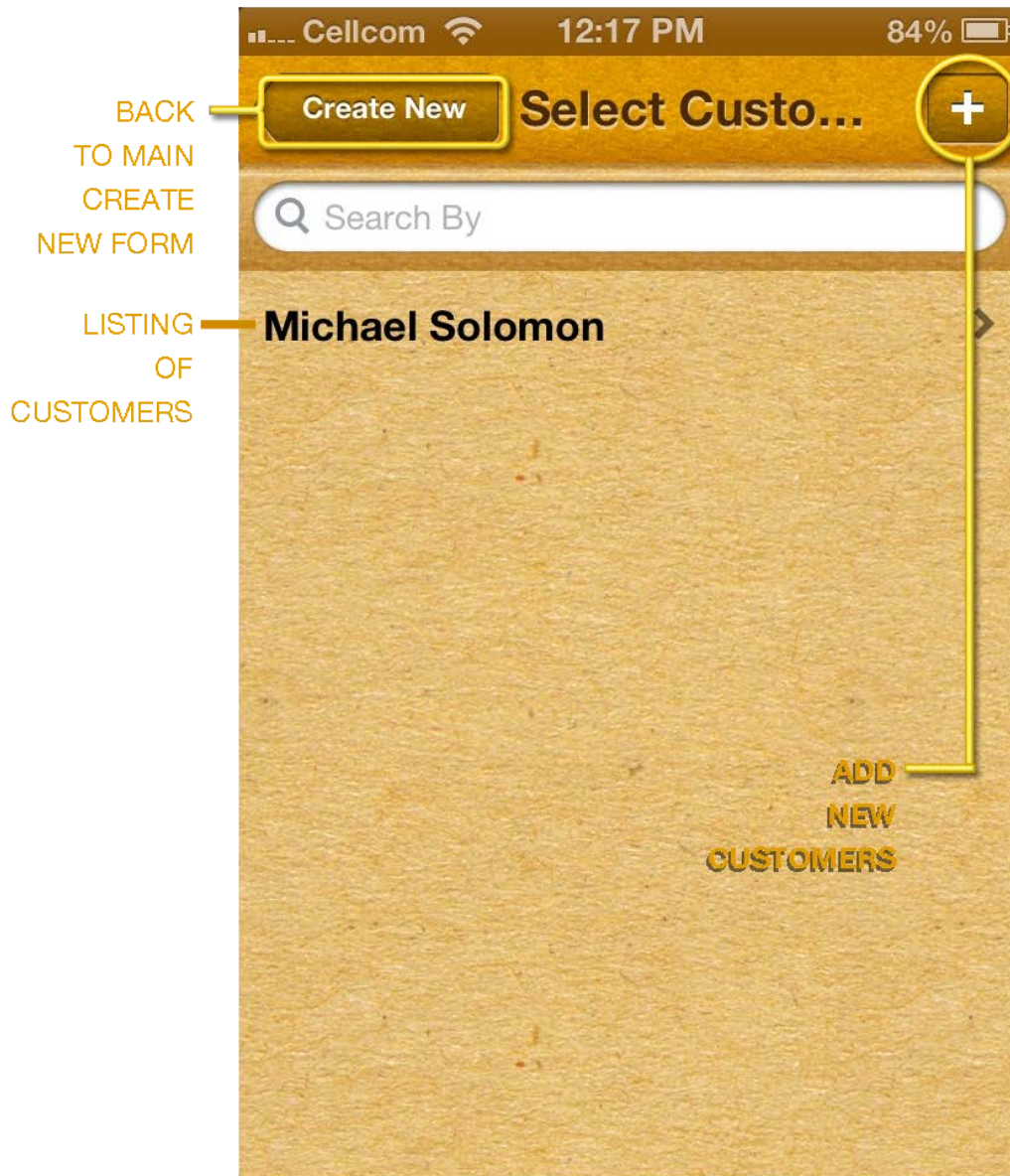


Choose whether you want to:

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

NEXT

Choose an existing customer or add a new customer.



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

The screenshot shows a mobile application interface for creating a new customer. The status bar at the top displays 'Cellcom', signal strength, Wi-Fi, the time '12:17 PM', and a battery level of '84%'. The app title is 'New Customer'. There are two buttons at the top: 'Cancel' and 'Save'. A yellow box highlights the 'Cancel' button, with a line pointing to the text 'CANCEL ENTRY' on the left. A yellow circle highlights the 'Save' button, with a line pointing to the text 'SAVE CUSTOMER' at the bottom right of the form. The form contains several text input fields: 'Company', 'Contact', 'Phone', 'Fax', 'eMail', and 'Website'. Below these is a section titled 'Billing Address' with two fields: 'Address 1' and 'Address 2'. The 'Address 1' field is marked as a 'MANDATORY FIELD' in red text.

Cellcom 12:17 PM 84%

Cancel **New Customer** **Save**

CANCEL ENTRY

Company Text

Contact Text

Phone Text

Fax Text

eMail Text

Website Text

SAVE CUSTOMER

Billing Address

Address 1 Text **MANDATORY FIELD**

Address 2 Text

Cellcom 12:17 PM 84%

Cancel **New Customer** **Save**

ZIP Text **MANDATORY FIELD**

Country Text **SAVE CUSTOMER**

Credit Limit (\$) Number

IS CUSTOMER TAX EXEMPT? Taxable **ON**

Tax ID Text

Payment Terms

C.O.D. Net EOM

CHOOSE ONE OF THESE PAYMENT TERMS

When you add new customers, you need to set up their terms of payment.

Either **C.O.D.** | **NET** | or **E.O.M.** (i.e. Endo of Month.)

If you choose **NET**, the program will open an option for you to enter the due days and discount days.

INVOICING

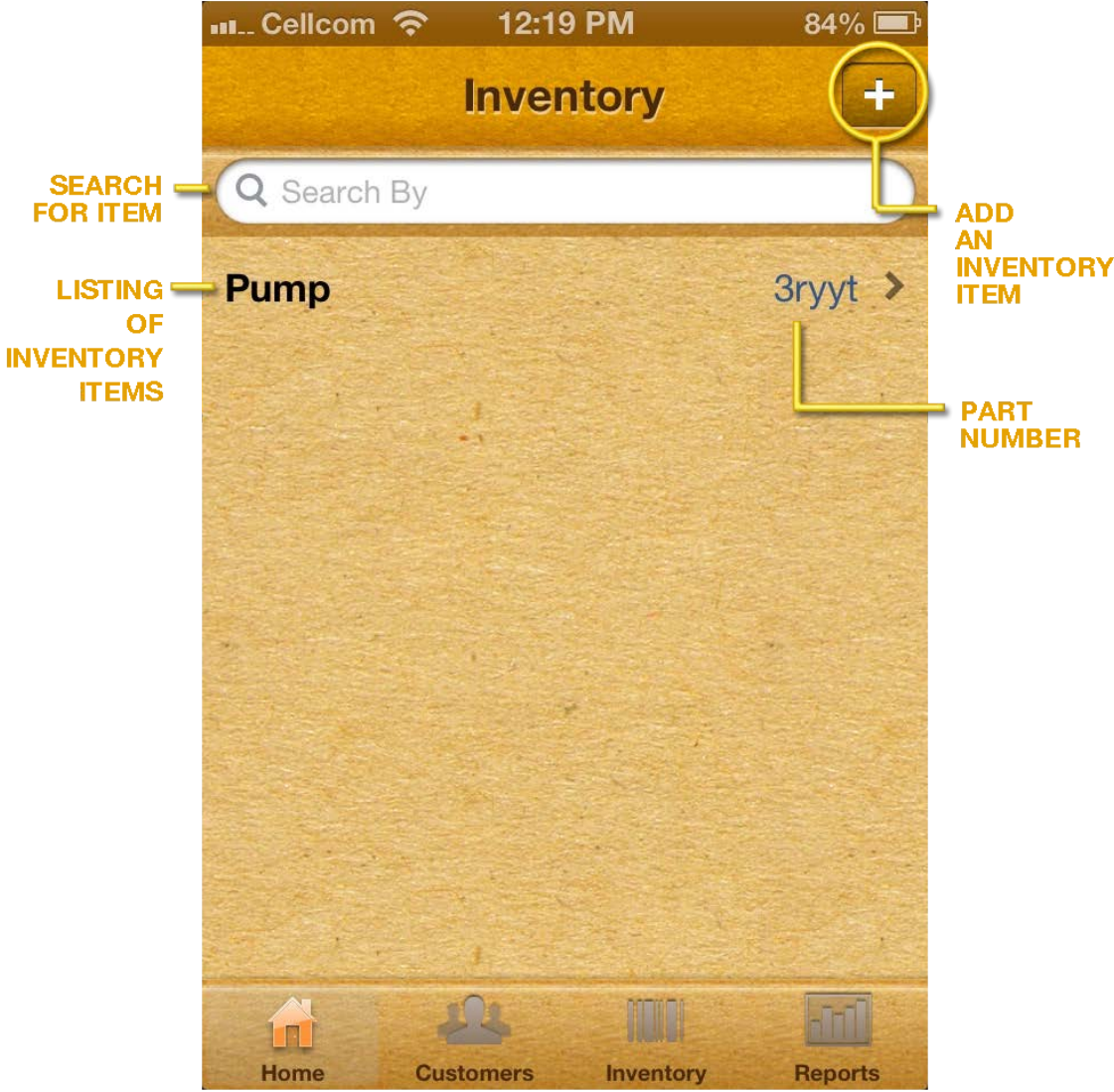
After **creating a customer**, you will come to the **INVOICE** screen. There you have a choice of picking a stock item or adding a temporary item.

This can be a service item (hourly items), or any other item(s) of which you do not want/need to keep track.

The screenshot shows the INVOICE screen with the following elements and annotations:

- Cancel** button: Annotated with "CANCEL INVOICE".
- Save** button: Annotated with "SAVE INVOICE".
- Pick Stock Item** button: Annotated with "CHOOSE AN ITEM FROM INVENTORY".
- Form fields:**
 - Name**: Text
 - Description**: Text
 - Quantity**: 1
 - Price (\$)**: Number
 - Discount**: 0
 - Total (\$)**: 0.00
- Bottom navigation bar:** Home, Customers, Inventory, Reports.
- Annotations:** A bracket on the left side groups the form fields with the text "ADD AN ITEM [NOT TO BE SAVED INTO INVENTORY]".

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



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

Cellcom 1:29 AM 65%

Cancel **New Item** **Save**

CANCEL ITEM SAVE NEW INVENTORY ITEM

Name Text MANDATORY FIELD

Description Text MANDATORY FIELD

Part Number Text MANDATORY FIELD

Manufacturer Text

Category Text

Supplier Text

Quantity Number

Ordered Items 0

Home Customers Inventory Reports

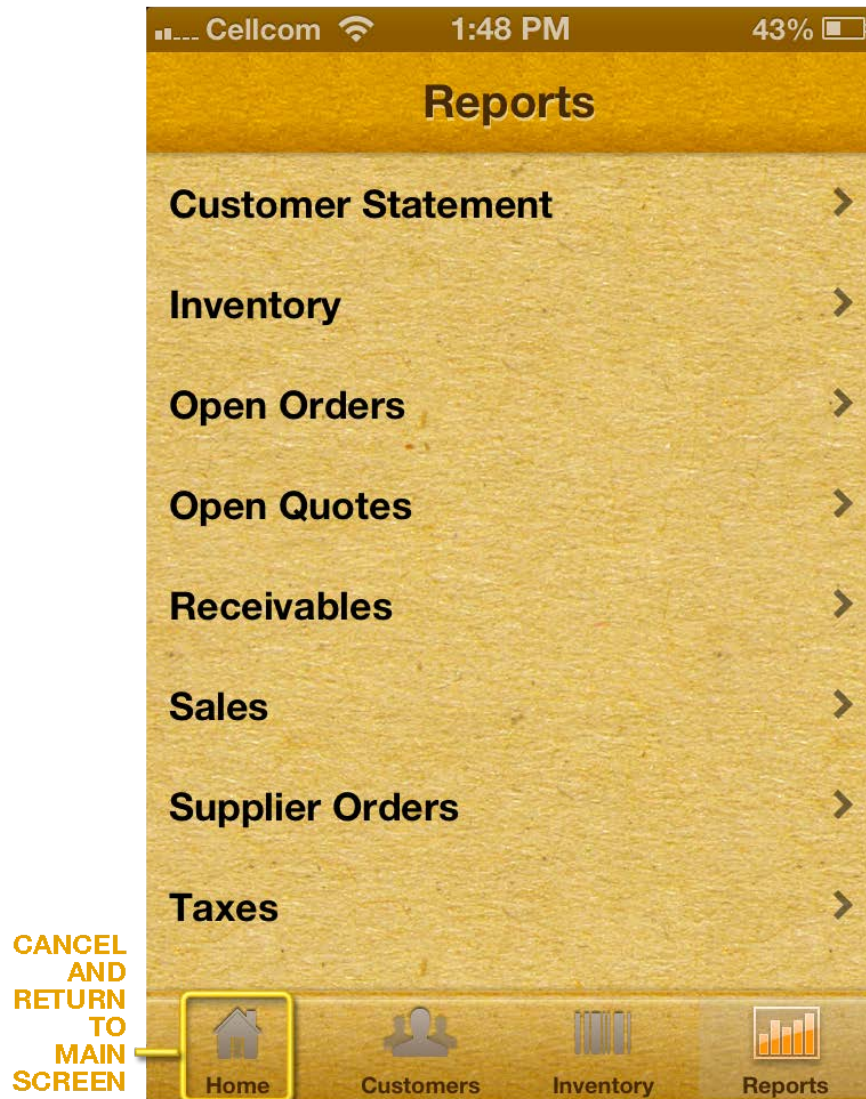
The program also keeps track of: height, width, length, and weight of items.

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

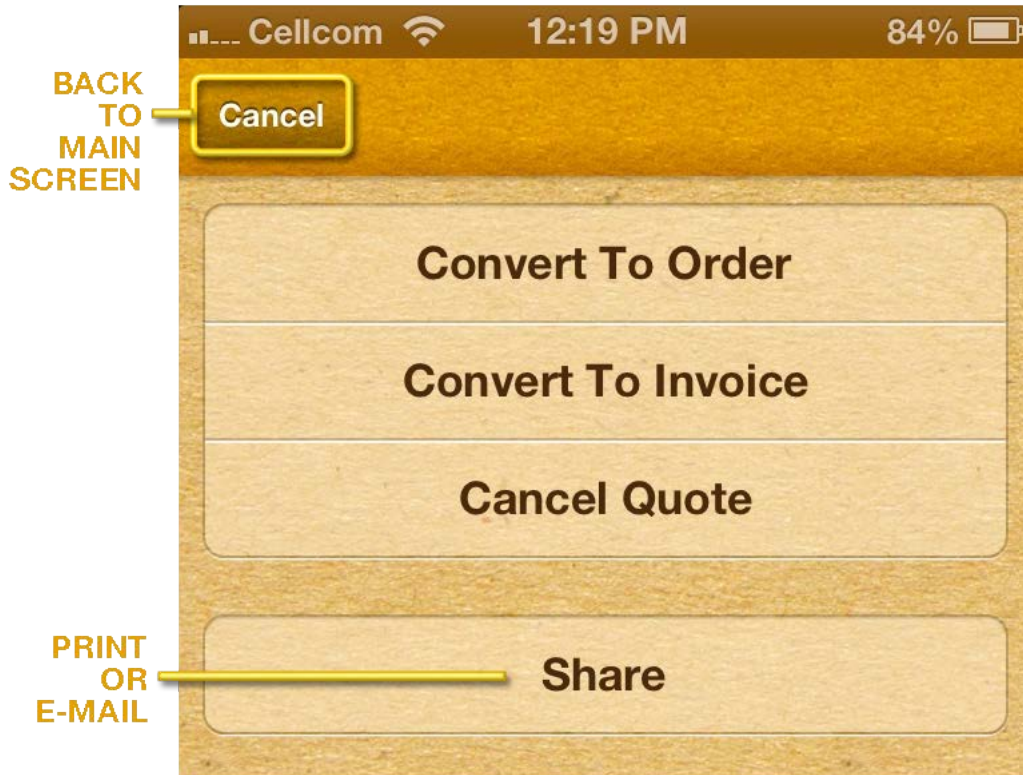


REPORTS

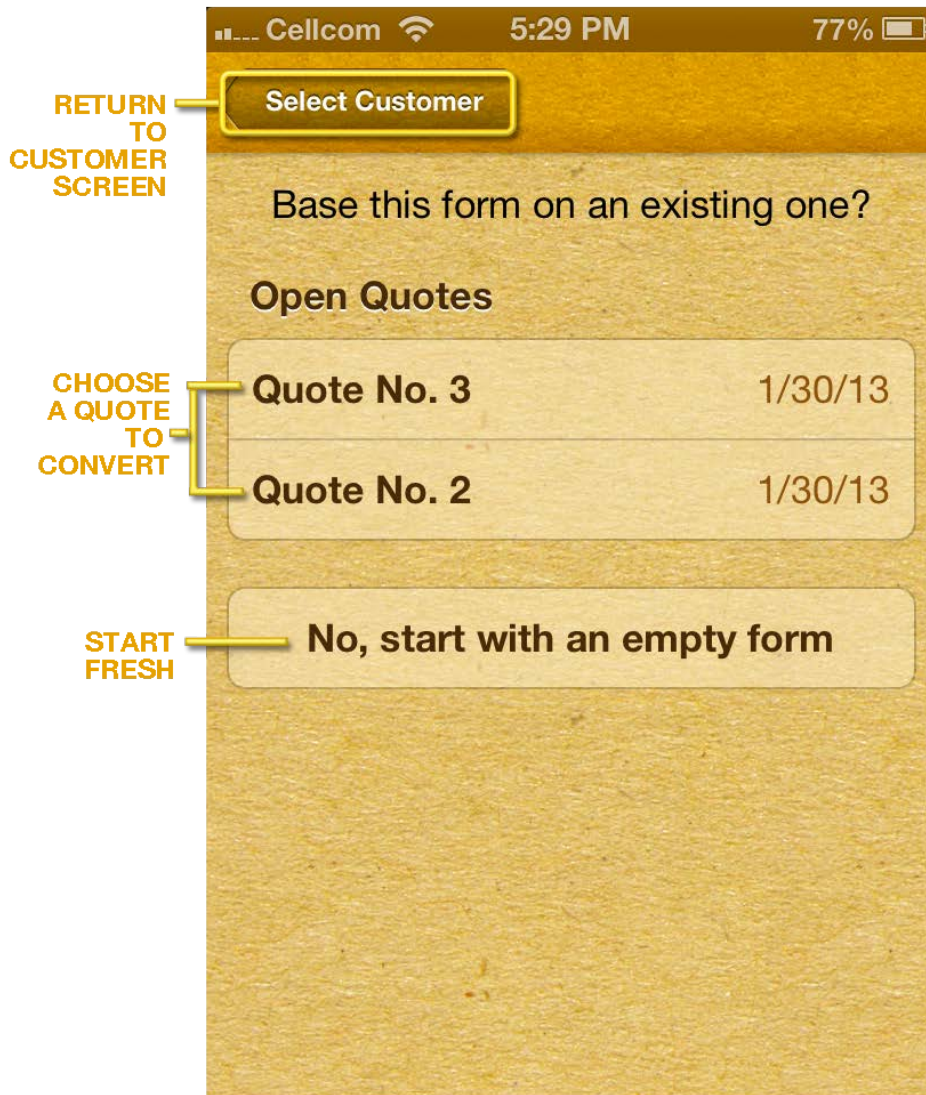
A key function of the **QUOTES & BILLING** App is the program's ability to convert an existing quote into an order and/or invoice.



Any invoice can be converted directly into an invoice.

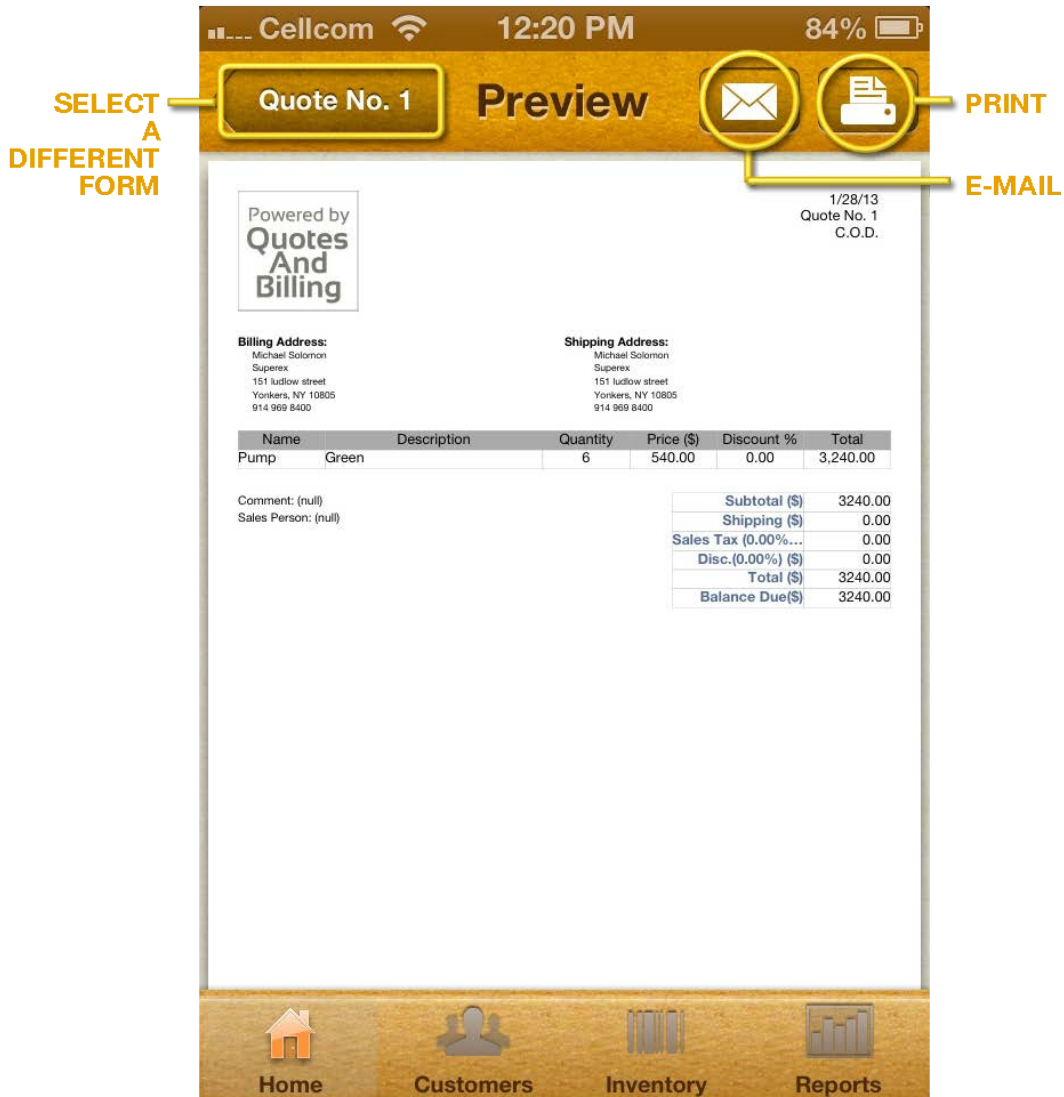


Select a Customer. The **QUOTES & BILLING** app will then display the **open quote/s attributed to that customer.**



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

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



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

Cellcom 5:53 PM 77%

Cancel **Receipt No. 2** **Save**

SELECT A DIFFERENT FORM

SAVE RECEIPT

Related to **Invoice No. 1**

Invoice Amount (\$) **45.00**

DISCOUNT FOR EARLY PAYMENT → Early Discount (\$) **0.00**

Amount Owed (\$) **45.00**

Date **1/30/13** >

Amount (\$) **0.00**

Payment Method **Text**

Comment **Text**

Home Customers Inventory Reports