



Invoice Quotation and Purchase Orders Maker

Professional Edition

Version 2.0.0.0

Help File

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2.0 About This Software

This software is made to create invoices, quotations and purchase orders. With its powerful interface it provides many attractive features and yet very flexible to integrate into your own business operations. It can support one company or multiple companies. Allowing you to have a centralised system for all your invoices, quotations and purchase orders.

3.0 System Requirements

Invoice Quotation and Purchase orders Maker Pro needs the following system requirements to run:

1. Microsoft Windows operating system
2. 64 MB RAM
3. 10 MB free disk space
4. Dot Net 4.0 Framework

The software has been tested on Windows 7 and Windows 8, 8.1

This software is also compatible with Windows XP SP3 and Windows Vista.

4.0 Version History

Jan 2016 *Invoice Quotation and Purchase Orders Maker Pro (2.0.0)*
Bug fixes and maintenance

Aug 2014 *Invoice Quotation and Purchase Orders Maker Pro (1.0.0)*
First Release



5.0 Software Support

The support provided with this software is limited. Please only contact us if you would like to report a software bug. One simple software offers tutorials on how to use this product and general questions and feedback are welcome.

It is highly recommended that you test the trial version of this software before purchasing the full version

6.0 Order Information

For latest Offers and Special prices please visit:

<http://www.onesimplesoftware.com>



7.0 Software Features

Below is a summary of features:

1. Create and maintain different company profiles
2. Create invoices, purchase orders and quotations
3. Create numbering systems for invoices, purchase orders or quotations. Also the ability to customise the format of the numbering system. Each company can have its own numbering system.
4. Add your company logo, address and contact information, also set up a tax/vat rate and choose if you want to apply tax/vat or not.
5. Customise your purchase terms, payment status and add unlimited sales contacts
6. Customise shipping methods
7. Add custom customer messages or use one of the preloaded messages
8. Customise the number of columns that will appear in your invoice, quotation and purchase orders
9. Customise the names of columns that will appear in your invoice, quotation and purchase orders.
10. Customise all labels that will appear in the invoice, quotation and purchase orders with the ability to display or hide any unwanted information. The customisation is also useful if you are building an invoice in a different language! Mainly the labels you can customise are "Entered by", "Date", "Document number", "Due Date", "Terms", "Account Number", "Order Number", "Shipping Method", "Billing address", "Delivery Address". You can choose to display or hide the above labels on the document you are generating as well as change their title to any of your own; this gives you more flexibility in generating your documents.
11. Also important to note that each customisation is unique to each company you create and all settings can be changed for every company profile.
12. Basic inventory management screen allowing you to add your products and prices for convenient use during the generation of invoices, quotations and purchase orders.
13. Import/export your own products and prices to the inventory manager. The import feature supports importing .csv files.
14. Backup and restore features
15. Use different preloaded templates or create your own by customising a template
16. Setup wizard to guide you through the setup process.
17. Help tutorials included.



Comparing Software Editions

Below is a comparison of all editions:







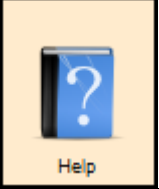
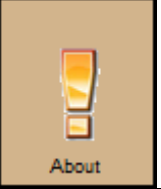





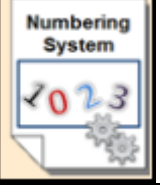
Features	Editions	
	Lite	Professional
Quick setup wizard	Y	Y
Manage multiple Companies	-	Y
Create invoices	Limited*	Y
Create purchase orders	Limited*	Y
Create quotations	Limited*	Y
Create numbering systems for invoices	Y	Y
Create numbering purchase orders	Y	Y
Create numbering for quotations	Y	Y
Customise the format of the numbering system	Y	Y
Enable/Disable Tax or VAT	Y	Y
Customise purchase terms	Y	Y
Customise payment status	Y	Y
Add unlimited sales contacts	1 Only	Y
Customise shipping methods	Y	Y
Custom customer messages	Y	Y
Customise the number of columns for invoices	Y	Y
Customise the number of columns for quotation	Y	Y
Customise the number of columns for purchase orders	Y	Y




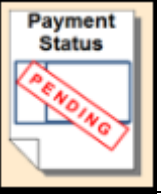





Customise the names of columns that will appear in your invoice	-	Y
Customise the names of columns that will appear in your quotation	-	Y
Customise the names of columns that will appear in your purchase orders.	-	Y
Customise the appearance and title of labels	-	Y
Basic inventory management screen incorporating adding an item, description and price	Y	Y
Import/export your own products and prices to the inventory manager	Y	Y
Backup and restore	-	Y
Preloaded/designed templates for using with invoices, quotation and purchase orders	Y	Y
Help tutorials	Y	Y

8.0 User Interface Features

Main Screen Buttons

<p>Company manager – create and delete company profiles</p>		<p>Create invoices, purchase orders and Quotations</p>	
<p>Backup all invoices, quotations and purchase orders along with all settings for all companies</p>		<p>Restore all backed up settings and invoices from a software compatible file</p>	
<p>Templates manager – setup and create templates</p>		<p>Software setup wizard – guidance through what needs setting up before generating any document</p>	 Setup Wizard
<p>Open software help file - this file!</p>	 Help	<p>About this software</p>	 About
<p>Open basic inventory manager</p>		<p>Search for an Invoice, Quotation or Purchase order from created and saved documents</p>	
<p>Invoice settings – setup how you want the invoice columns to appear</p>		<p>Purchase order settings – setup how you want the purchase order columns to appear</p>	
<p>Quotations settings – setup how you want the quotation columns to appear</p>		<p>Numbering systems – setup numbering systems for Invoices, Quotations and Purchase orders</p>	



<p>Customer message – setup and customise customer messages.</p>		<p>Payment status – setup and customise payment status messages</p>	
<p>Purchase terms – setup and customise purchase terms messages</p>		<p>Sales contact – setup sales contacts and add names or departments.</p>	
<p>Shipping methods settings – setup and customise shipping methods available</p>		<p>Tax settings – Tax and VAT rate for each company</p>	
<p>Exit software</p>	 <p>Exit</p>		



Main Screen Menu

The main menu appears in the top of the main screen and provides useful short cuts to access the same features that the buttons provide. The menu should look as below:

File Mode Create Setting Inventory Windows Help Exit

File Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> Search Restore Backup 	<ul style="list-style-type: none"> • Search – open the search form and allows you to search saved documents • Restore – restore the database from a software compatible file • Backup – back up all your invoices, quotations and purchase orders along with settings for all companies. This feature will generate a zip file compatible with the restore feature
---	---

Mode Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> Single Screen Mode Panels Mode Top Panel ▶ Bottom Panel ▶ Left Panel ▶ Right Panel ▶ 	<p><i>Level 2</i></p> <ul style="list-style-type: none"> Hide Show 	<ul style="list-style-type: none"> • Single Screen mode – this mode removes all panels and attaches all the buttons into one window • Panels Mode – this is the default lunch mode that the software uses to display all buttons in panels • Top Panel – hide or show panel • Bottom Panel – hide or show panel • Left Panel – hide or show panel • Right Panel – hide or show panel
---	--	--

Create Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> New Company New Document New Template 	<ul style="list-style-type: none"> • New Company – create, update and delete company profile • New Document – create invoices, purchase orders and quotations • New Template – manage, setup and create templates
---	--



Setting Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> Set Sales Contact Set Purchase Terms Set Numbering System Set Tax Set Customer Message Set Layout ▶ Set Template Set Shipping Methods 	<p><i>Level 2</i></p> <ul style="list-style-type: none"> Invoices Purchase Orders Quotations 	<ul style="list-style-type: none"> • Set Sales contact – add/delete sales person or department • Set Purchase terms – customise purchase terms • Set Numbering System – set up numbering system for each document type • Set Tax – setup Tax or VAT rate • Set Customer Message – customise customer messages • Set Layout > Invoices – columns and column titles • Set Layout > Purchase orders – columns and column titles • Set Layout – Quotations – columns and column titles • Set Template – setup and manage default templates • Set Shipping methods – customise shipping methods used in documents
--	---	--

Inventory Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> • View – opens up the inventory management screen
--	---

Windows Menu Item

<p><i>Level 1</i></p> <ul style="list-style-type: none"> Cascade Tile Vertical Tile Horizontal 	<ul style="list-style-type: none"> • Cascade currently open windows • Tile Vertical – tile the currently open windows vertically • Tile Horizontal – tile the currently open windows horizontally
---	--

Help Menu Item

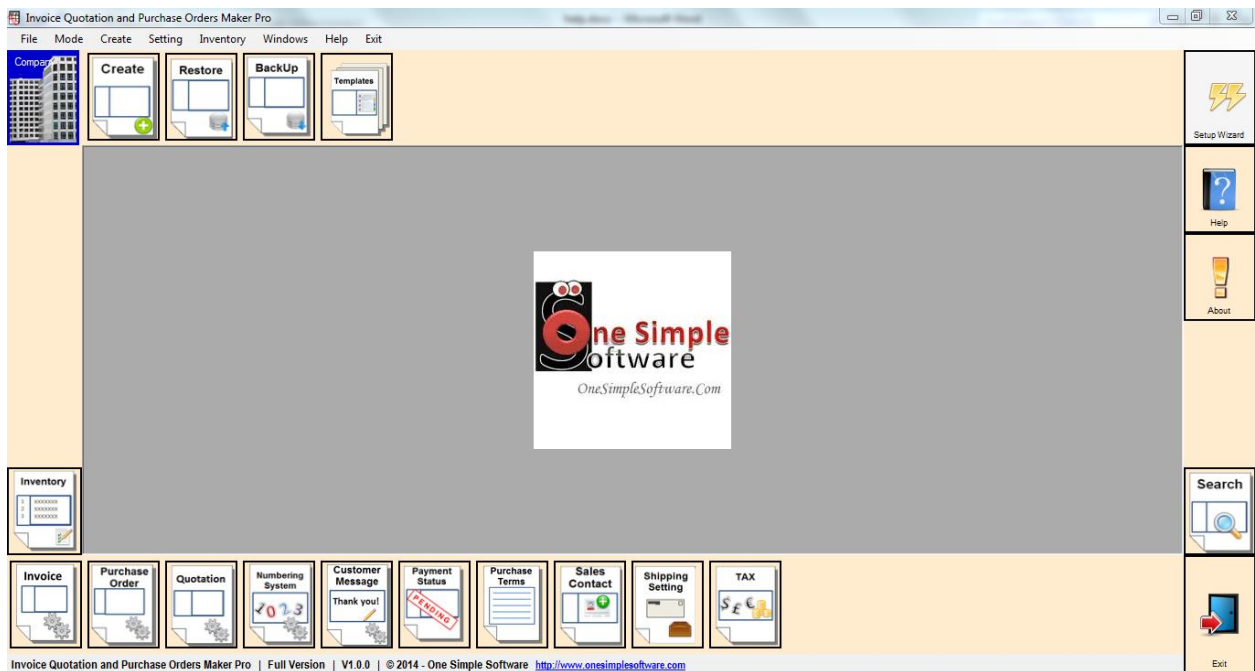
<p><i>Level 1</i></p> <ul style="list-style-type: none"> Open Help File About 	<ul style="list-style-type: none"> • Open Help file – opens this help file • About – About this software
---	--

Exit Menu Item – Has no levels and will exit the software

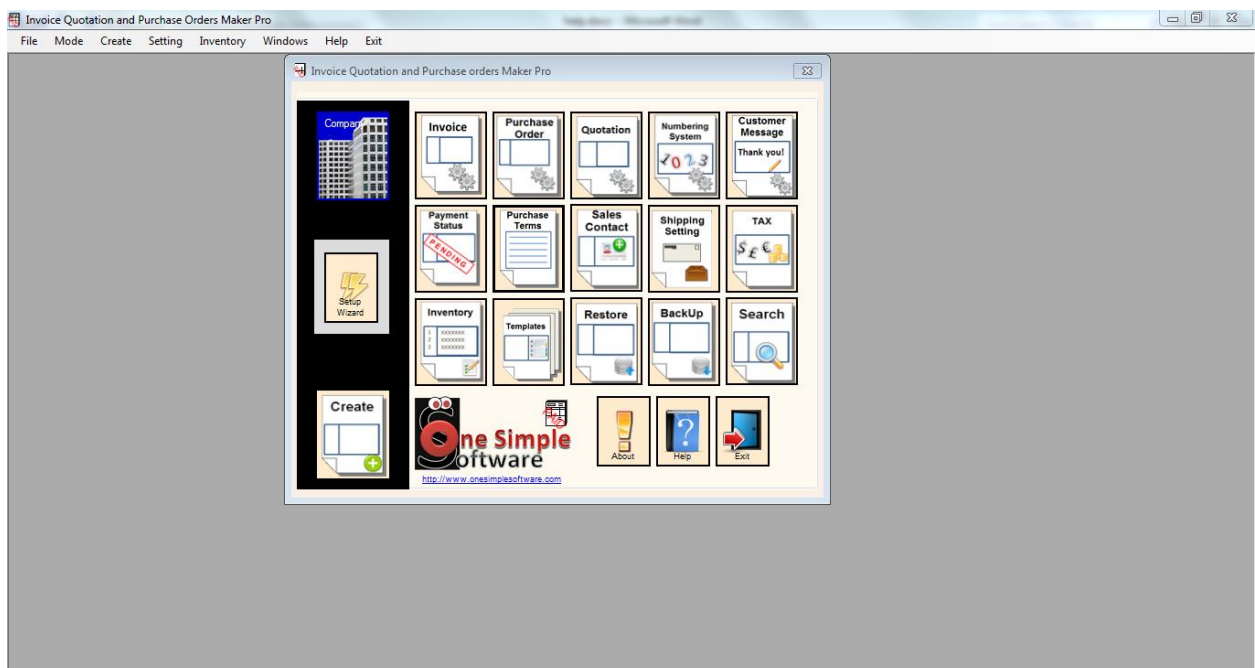


Main Screen Interface

There is two main modes for displaying the main screen, the software normally starts in panel mode this is the default mode as show below:



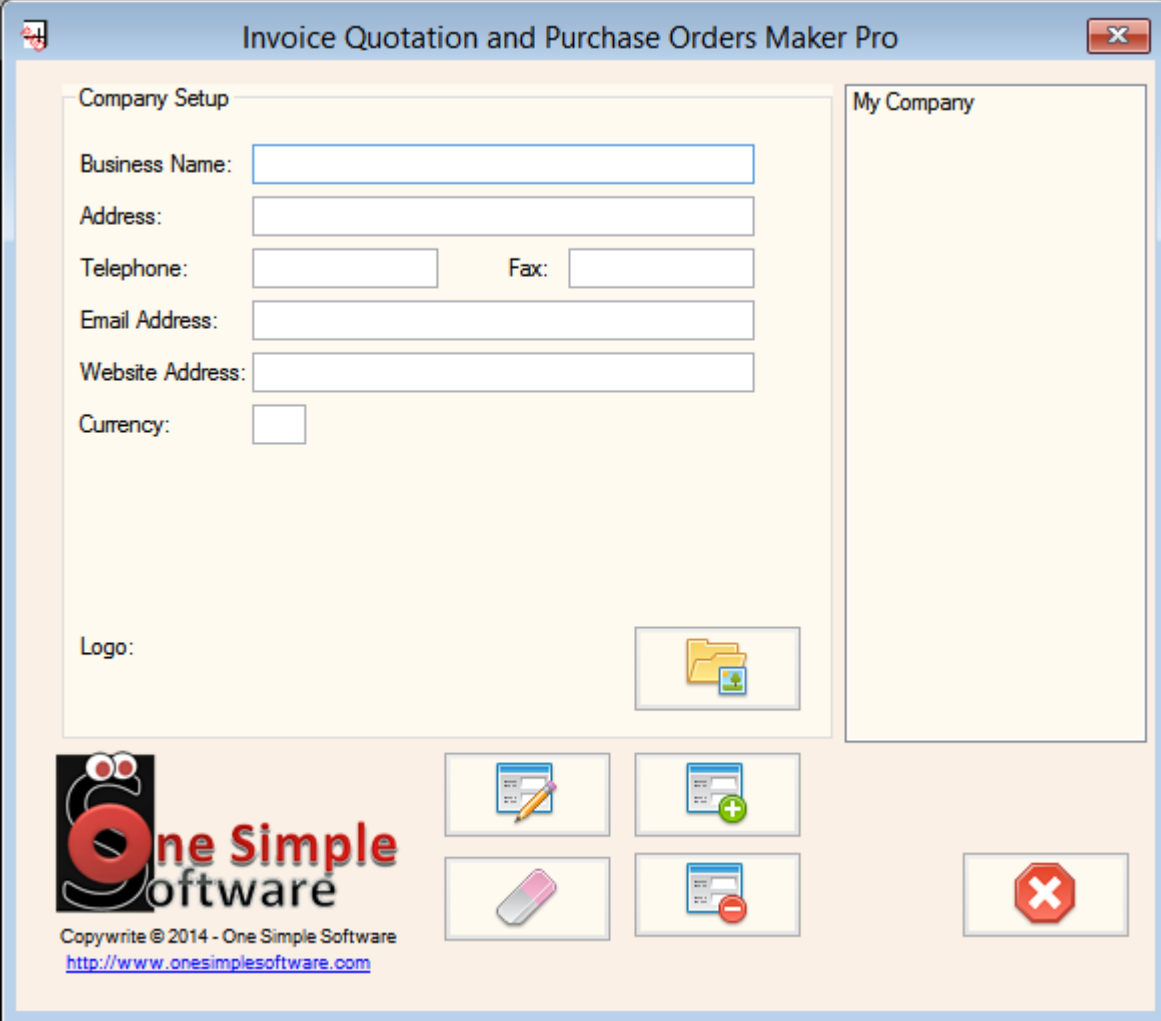
The no panel display mode can be accessed using the menu item Mode > Single Screen mode as shown below:



There is no major difference between the above modes they are added for convenience.

Company Manager

Company manager screen appears as below as shown below:




Load a logo file – jpg, gif, bmp and png (jpg format is preferable)



Save company information and add it to software database



Update edited content or update company information



Delete selected company

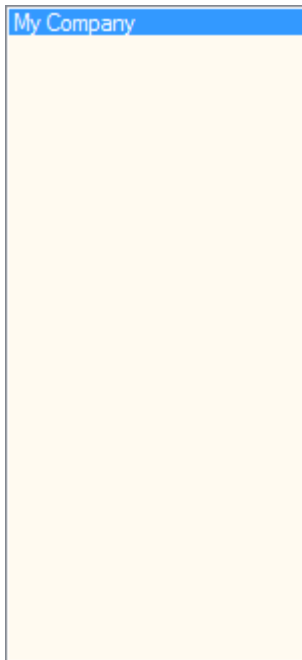


Clear text boxes



Close window

The list box on the right will display a list of all companies in the database





Invoice Settings

The invoice settings screen is where you can setup what will your invoice columns headers need to look like and how many you want to show (the minimum you need to show is two)

To setup this you need to have created a company first and then select the company name from the combo box as shown above. The invoice setting screen provides unique setting for each company in the combo box list. The default settings is shown in the above screen. To change a column header title type in the adjacent textbox provided. To disable a column uncheck the adjacent checkbox provided and this will hide the column from the final invoice.



Save Settings



Restore defaults

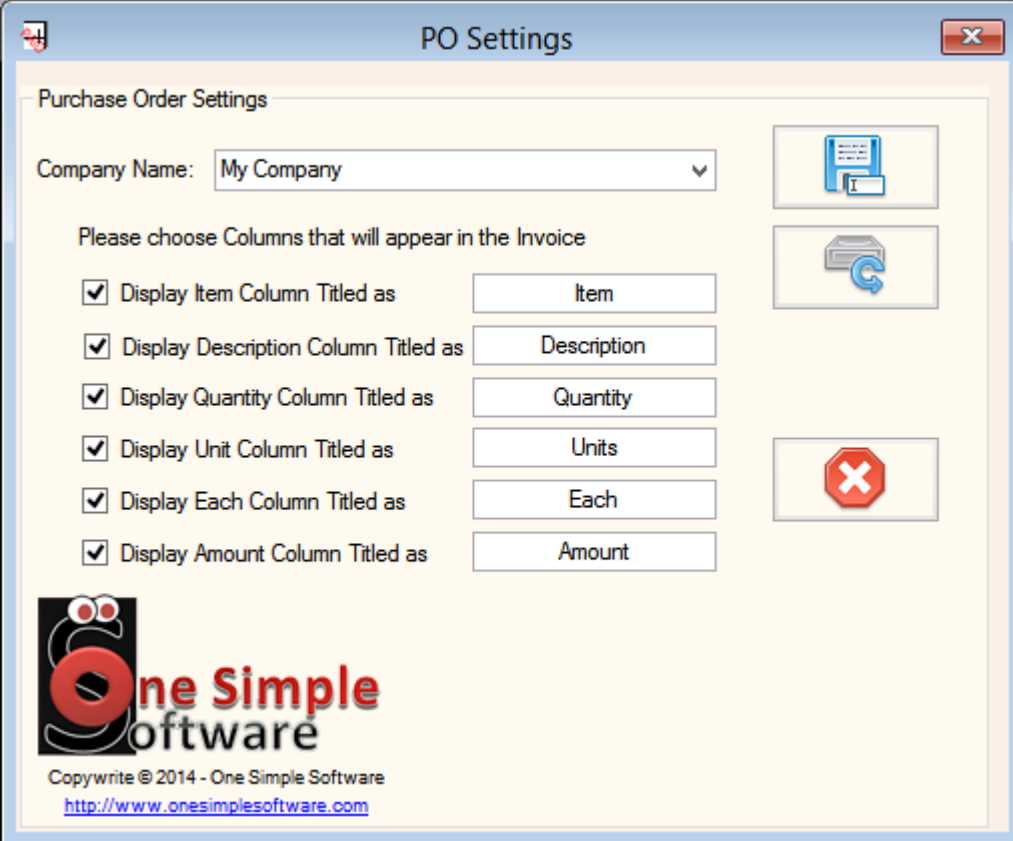


Close window



Purchase order Settings

The Purchase order settings screen is where you can setup what will your purchase order columns headers need to look like and how many you want to show (the minimum you need to show is two)



The screenshot shows the 'PO Settings' window with the following elements:

- Company Name:** A dropdown menu currently showing 'My Company'.
- Instructions:** 'Please choose Columns that will appear in the Invoice'.
- Column Settings:** A list of six columns, each with a checked checkbox and a text input field:
 - Display Item Column Titled as:
 - Display Description Column Titled as:
 - Display Quantity Column Titled as:
 - Display Unit Column Titled as:
 - Display Each Column Titled as:
 - Display Amount Column Titled as:
- Buttons:** Three buttons on the right side: 'Save Settings' (floppy disk icon), 'Restore defaults' (refresh icon), and 'Close window' (red X icon).
- Footer:** One Simple Software logo, 'Copyright © 2014 - One Simple Software', and the URL <http://www.onesimplesoftware.com>.

To setup this you need to have created a company first and then select the company name from the combo box as shown above. The purchase orders setting screen provides unique setting for each company in the combo box list. The default settings is shown in the above screen. To change a column header title type in the adjacent textbox provided. To disable a column uncheck the adjacent checkbox provided and this will hide the column from the final invoice.



Save Settings



Restore defaults

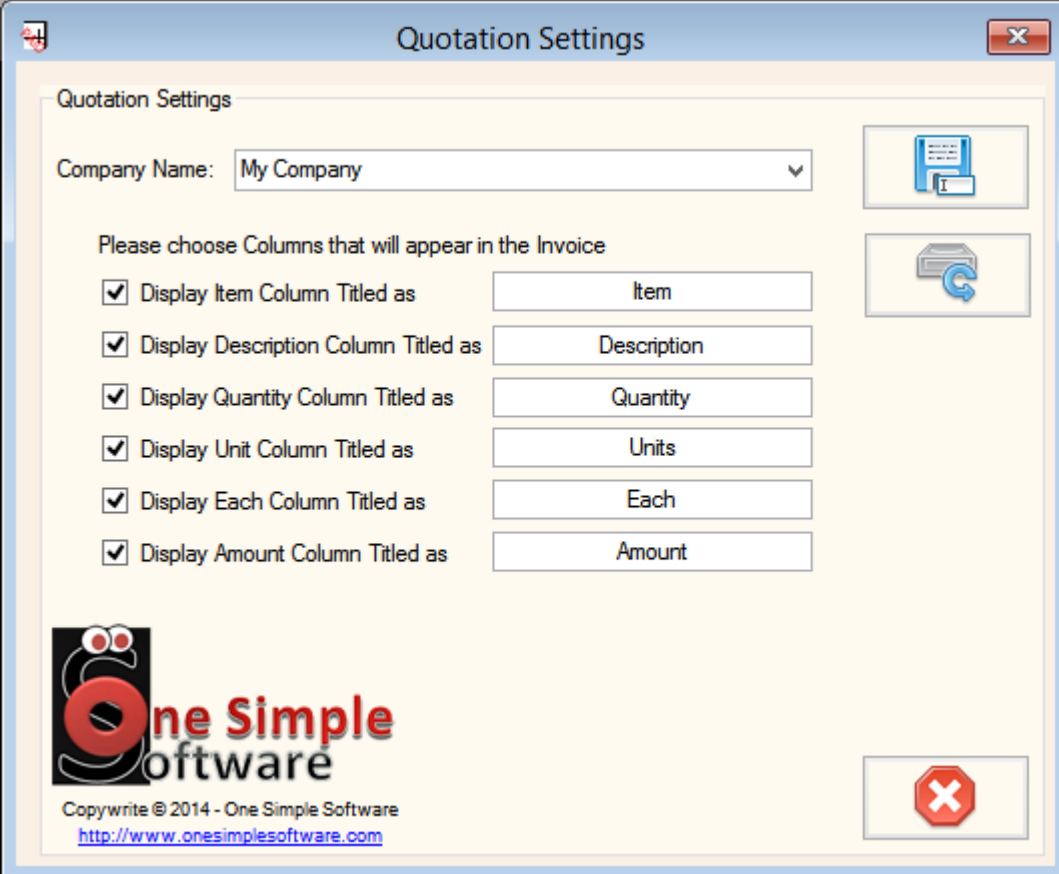


Close window



Quotations Settings

The Quotations setting screen is where you can setup what will your quotation columns headers need to look like and how many you want to show (the minimum you need to show is two)



The screenshot shows a window titled "Quotation Settings" with a close button (X) in the top right corner. The window contains the following elements:

- Quotation Settings** (Section Header)
- Company Name:** A dropdown menu currently showing "My Company".
- Save Settings:** A blue floppy disk icon button.
- Restore Defaults:** A blue circular arrow icon button.
- Column Selection:** A list of checkboxes and text boxes for selecting columns to appear in the invoice:
 - Display Item Column Titled as
 - Display Description Column Titled as
 - Display Quantity Column Titled as
 - Display Unit Column Titled as
 - Display Each Column Titled as
 - Display Amount Column Titled as
- Close Window:** A red octagonal button with a white 'X'.
- Footer:** One Simple Software logo, "Copyright © 2014 - One Simple Software", and the URL <http://www.onesimplesoftware.com>.

To setup this you need to have created a company first and then select the company name from the combo box as shown above. The quotation setting screen provides unique setting for each company in the combo box list. The default settings is shown in the above screen. To change a column header title type in the adjacent textbox provided. To disable a column uncheck the adjacent checkbox provided and this will hide the column from the final invoice.



Save Settings



Restore defaults

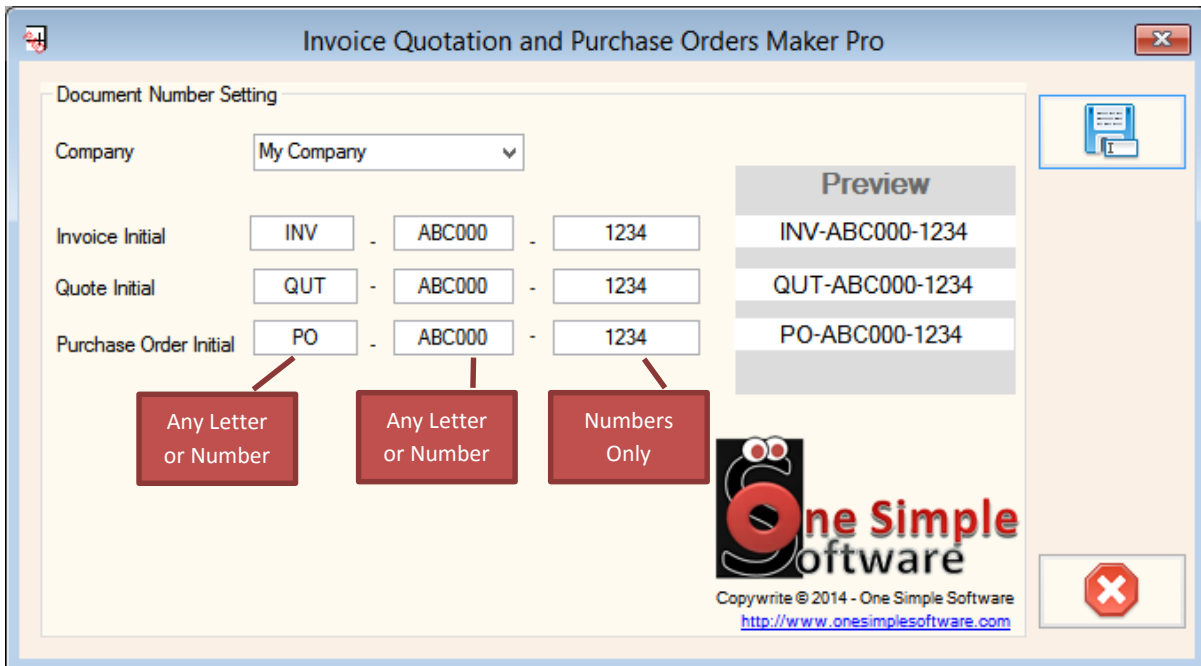


Close window



Document numbering setting

The settings can be used to create a document numbering system for any invoice, purchase order and quotation document. The system can be unique for each company you create.



The screenshot shows the 'Document Number Setting' window. It includes a 'Company' dropdown menu set to 'My Company'. Below are three rows of input fields for 'Invoice Initial', 'Quote Initial', and 'Purchase Order Initial'. Each row has three boxes: a letter box (INV, QUT, PO), a hyphen, a six-digit alphanumeric box (ABC000), a hyphen, and a four-digit numeric box (1234). Red callout boxes point to these boxes with labels: 'Any Letter or Number' for the letter and alphanumeric boxes, and 'Numbers Only' for the numeric box. To the right is a 'Preview' section showing the resulting document numbers: 'INV-ABC000-1234', 'QUT-ABC000-1234', and 'PO-ABC000-1234'. The window also features a 'Save Settings' icon (floppy disk) and a 'Close window' icon (red X) on the right side. The One Simple Software logo and copyright information are at the bottom.

The preview boxes provides a final view of how the number will be generated.



Save Settings

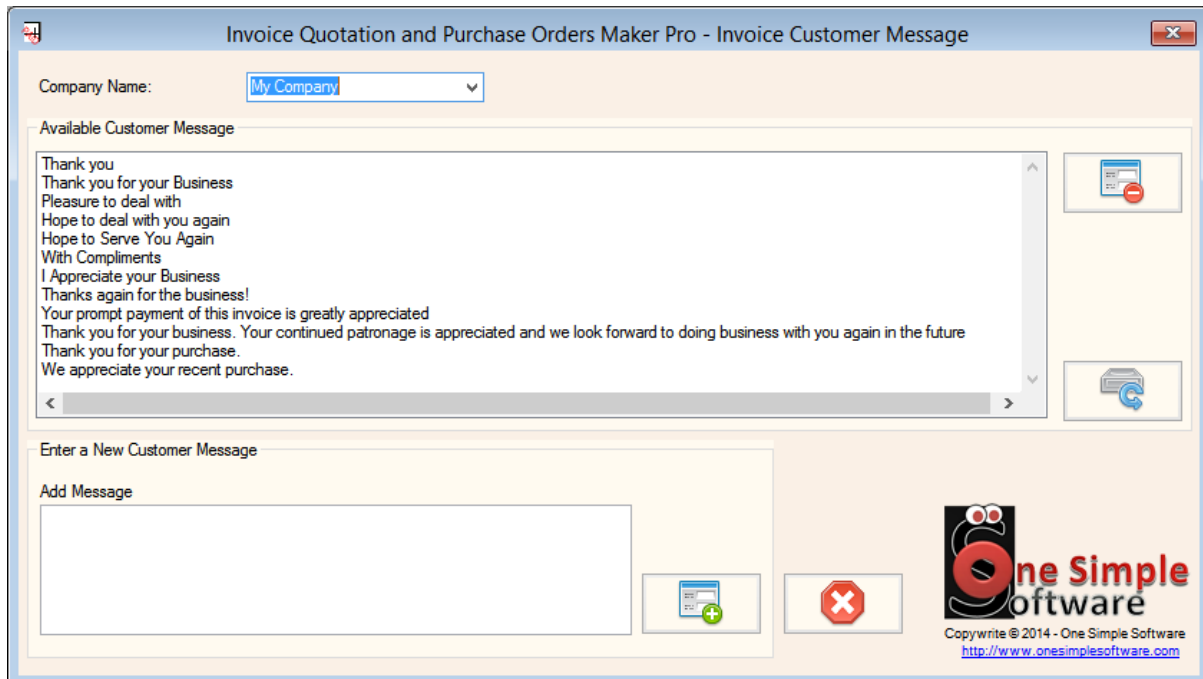


Close window



Customer Message Settings

The customer message screen has a set of preloaded default messages that are already provided, there messages can be deleted or you can customise them and add your own message. The messages are unique for each company you create.



Delete selected message



Add and save message to the list



Restore defaults

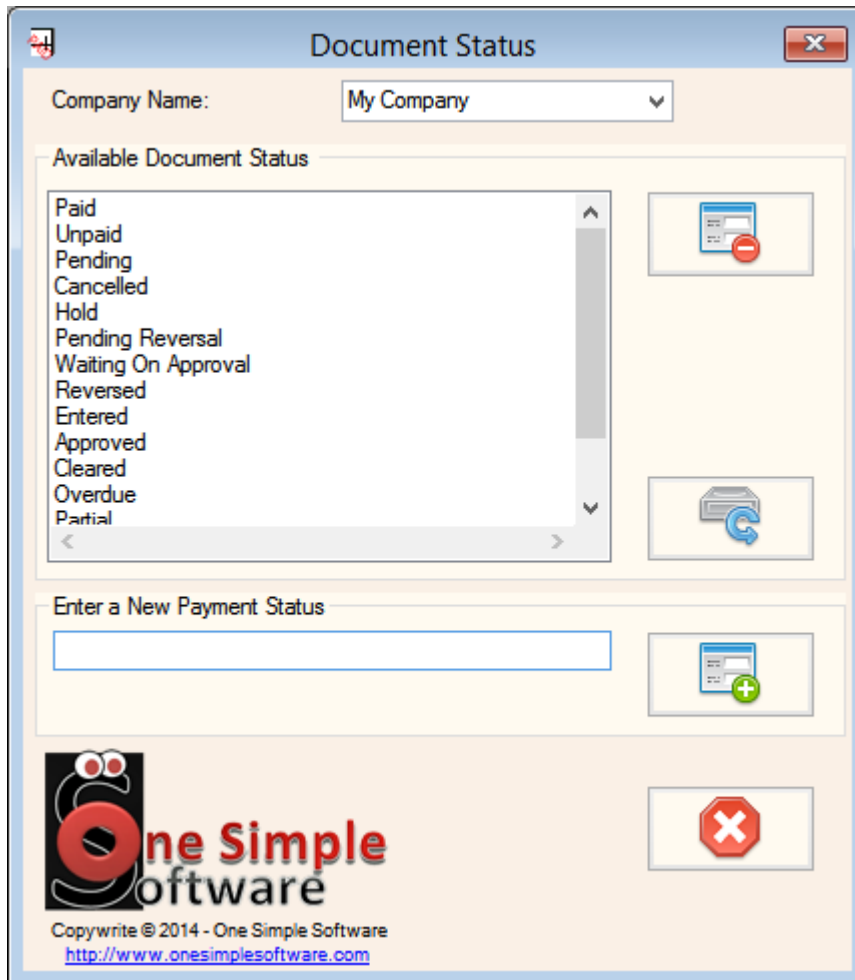


Close window



Document Status Settings / Payment Status

This provides short messages that can appear on invoices, quotations or purchase orders. The message can be customised or deleted. The software comes with a few preloaded status messages. All messages are unique to each company. So they need to be customised for each company you add



Delete selected message



Add and save message to the list



Restore defaults

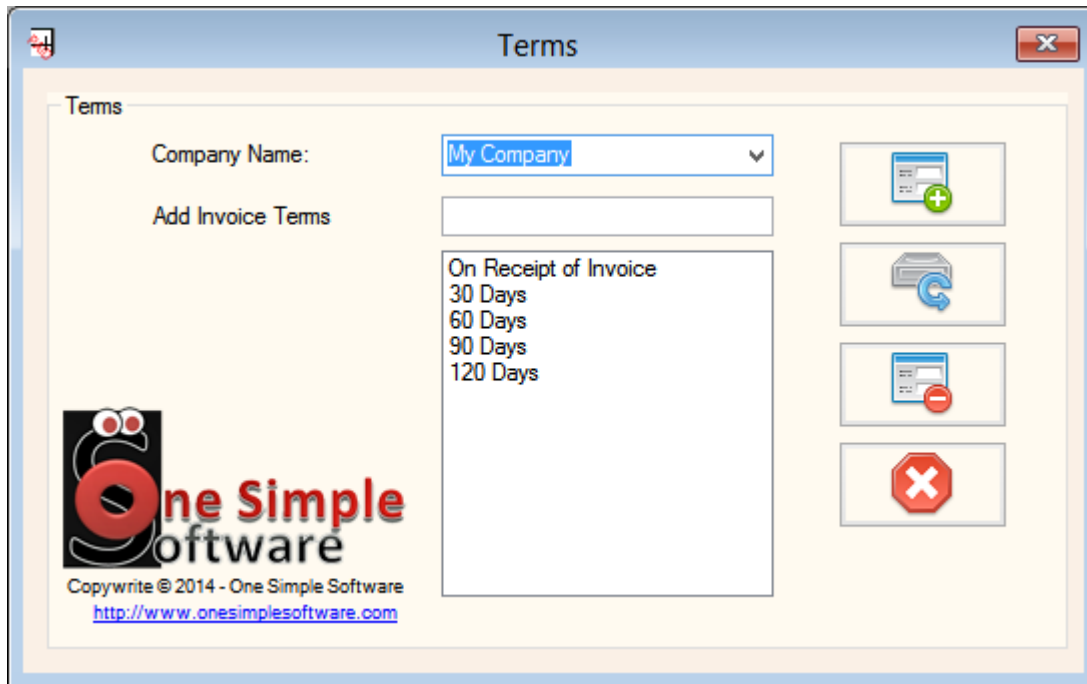


Close window



Purchase Terms

The screen provides a preloaded states messages that can be customised or deleted. The messages are unique to each company you add and need to be customised.



Delete selected message



Add and save message to the list



Restore defaults

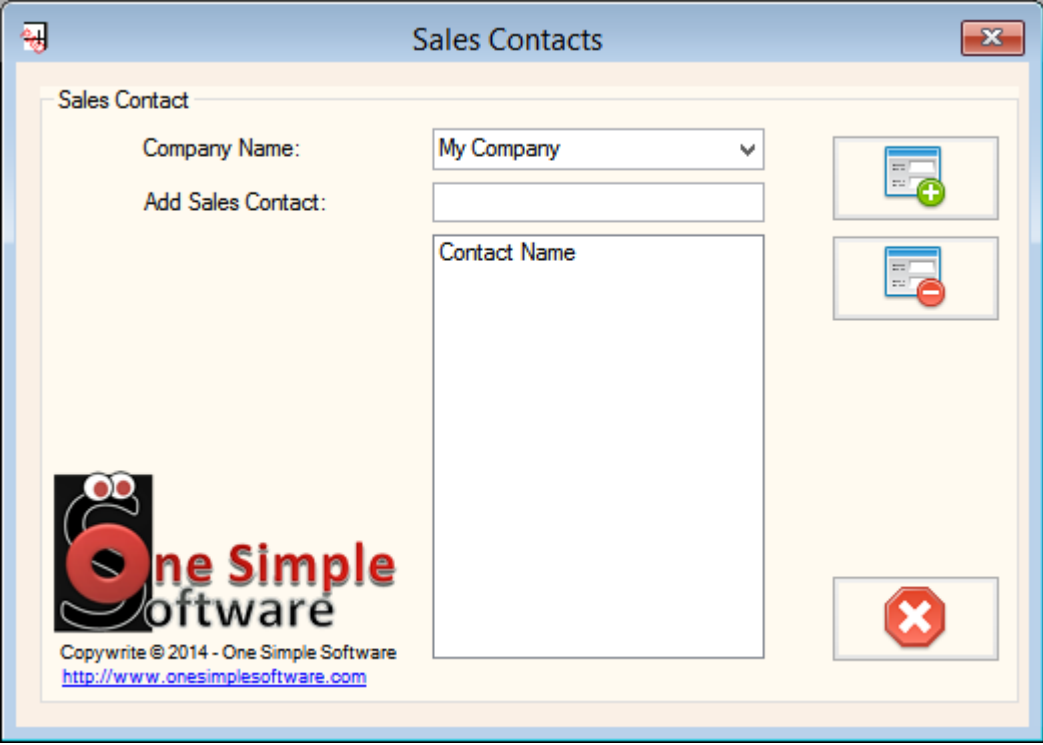


Close window



Sales Contact Settings

This is another form where you can add all sales contact personnel that can appear on any quotation, invoice or purchase order. The names added or departments are unique for every company present in the combo box.



Delete selected contact



Add and save contact to the list

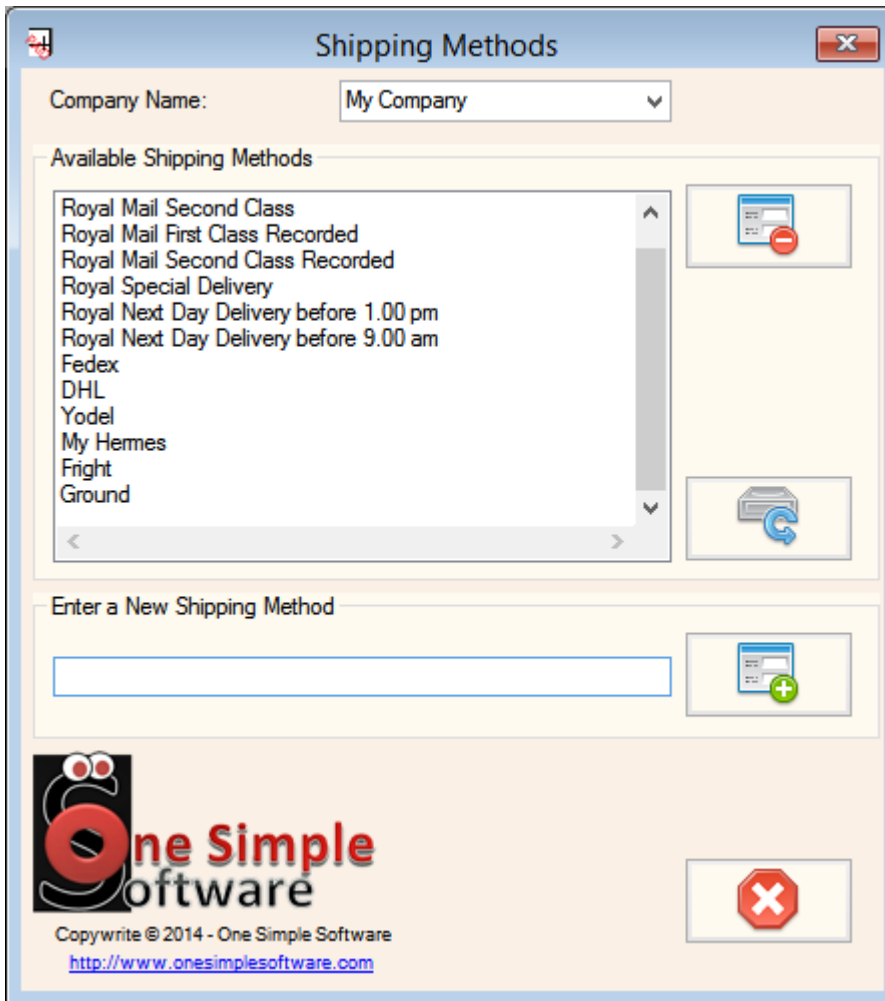


Close window



Shipping Methods Settings

The screen provides a preloaded methods for shipping, the methods can be changed or customised for each company in the combo box.



Delete selected shipping method



Add and save shipping method to the list



Restore defaults



Close window



Tax / VAT Settings

The settings screen will allow you to set the Tax or Value Added Tax (VAT) for each company in the combo box. If you don't want to charge any tax then enter zero "0" in the text box then save the settings



Save Settings

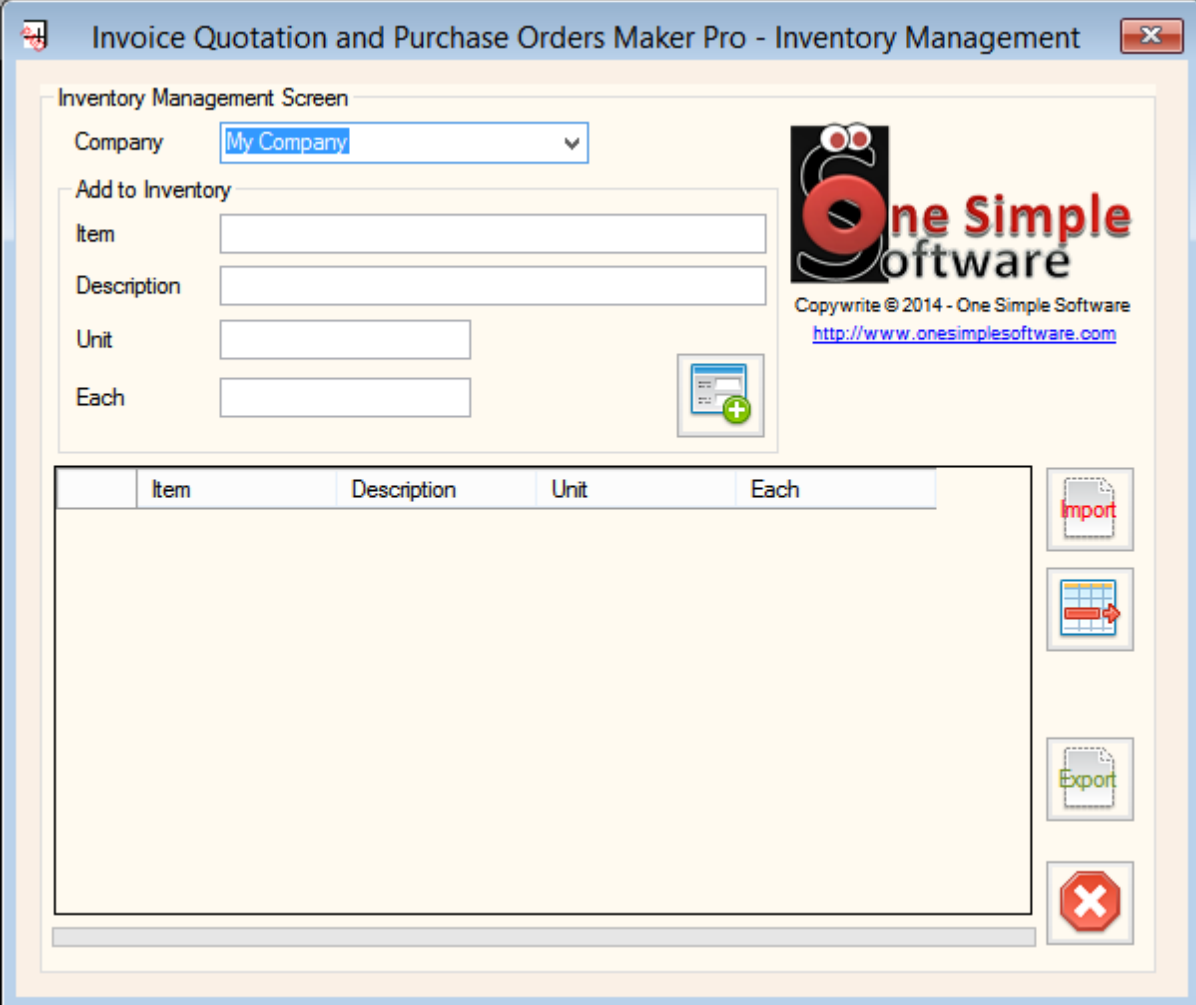


Close window



Inventory Management

The inventory management screen allows you to maintain a basic database, the main purpose to provide a quick access to inventory listing to increase productivity during the documents creation process. To add any item you must first select a company from the combo box. If there is none present this indicates that you need to create one first, fill in all fields.



Inventory Management Screen

Company:

Add to Inventory

Item:

Description:

Unit:

Each:

Item	Description	Unit	Each
------	-------------	------	------

Import

Export

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Added items MUST have the following:

Item: can be a text and/or a number

Description: can be a text and/or a number

Unit: numbers only

Each: this needs to be in number format and it mainly represent the Price of each unit



A demonstration is shown below

	Item	Description	Unit	Each
▶	Item 1	Item 1 Description	1	12
	Item 2	Item 2 Description	6	23
	Item 3	Item 3 Description	1	9



Import to the inventory – this allows you to import a comma delimited file format, the file need to have a “.CSV” format. For this to work your CSV file need to have four columns each column should include the details formatted as stated [above](#). There is no need to have the column names in the first row of your file.



Delete selected row. Simply select any cell and click on this button to delete the full row.



Export the full inventory to a comma delimited file format. The file will have the extension “.CSV”



Add and save the item to inventory.

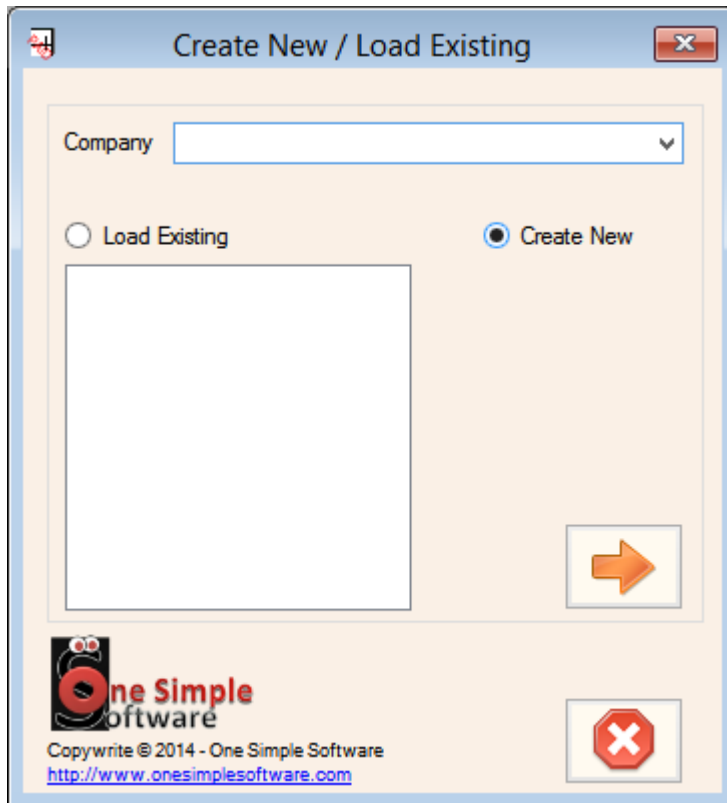


Close window



Document Creation

When the “Create” Button is clicked the screen below should appear, it offers two different options one to load an existing saved file or create a new document.

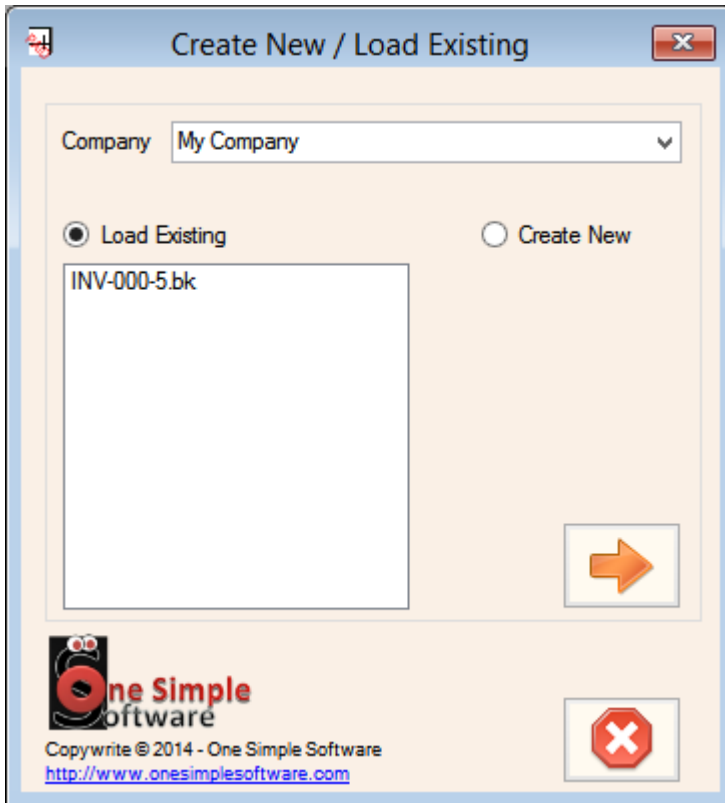


Loading existing – this feature mainly allows you to load a file from the software default installation folder. The purpose of this feature is to enable saving work progress. If you are working on a document and needed to leave your work and get back to the document later you should save the progress of your work. All saved files appears in the list box shown above.

Note: generated invoices are accessed using a different feature!



So if you select a company and click on “Load Existing” any files saved will be shown as below:

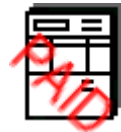


Simply select the file from the list and click on the Next “Arrow” to load the saved file.

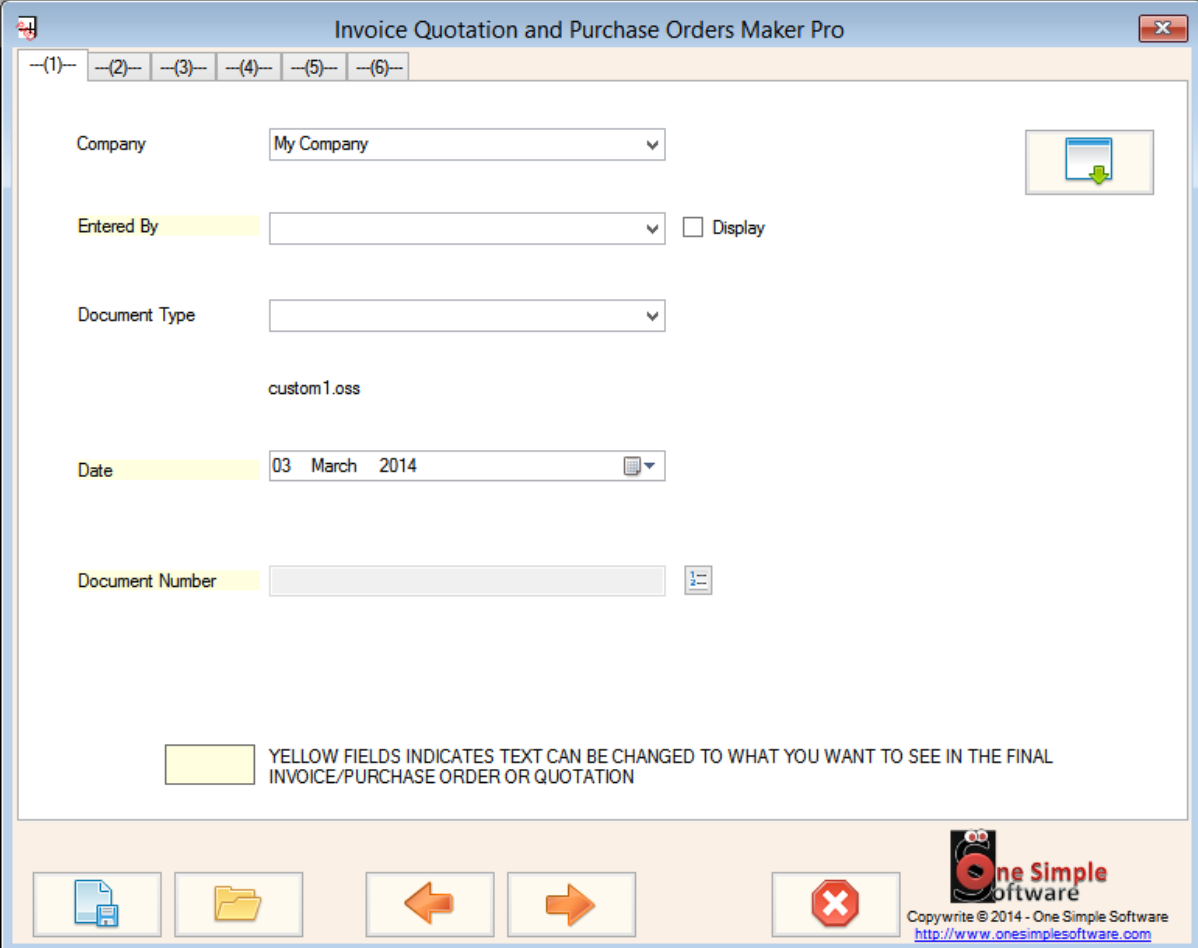


Go to Next Screen

The software document creation interface is described on the next page.



Tab 1



Company: My Company

Entered By: Display

Document Type:

custom1.oss

Date: 03 March 2014

Document Number:

YELLOW FIELDS INDICATES TEXT CAN BE CHANGED TO WHAT YOU WANT TO SEE IN THE FINAL INVOICE/PURCHASE ORDER OR QUOTATION

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<http://www.onesimplesoftware.com>

Note: all yellow coloured fields are text boxes! They are there for customisation purpose to allow flexibility and easier integration into your own invoicing system. These text fields will appear on invoices, purchase orders and quotations providing that the “Display” check box is checked if unchecked the software will ignore the field in question.

To proceed select the company name from the combo box, then a document type and generate a document number.



Refresh – Reload or update, click this button if you selected a different company name from the combo box list.



Save information for further work.



Load a save work file – this opens the screen [here](#) and you can then select the “Load Existing” option to load a file



Move back



Move forward



Close window

Tab 2

The second screen should look as shown below:

--(1)--	--(2)--	--(3)--	--(4)--	--(5)--	--(6)--
Due Date	03 March 2014	<input type="checkbox"/>	Display		
Terms		<input type="checkbox"/>	Display		
Account Number		<input type="checkbox"/>	Display		
Order Number		<input type="checkbox"/>	Display		
Payment Status		<input type="checkbox"/>	Display		
Shipping Method		<input type="checkbox"/>	Display		
Customer Message					

The information above can be filled in however some can be ignored. All templates requires a customer message. This messages come from [this screen](#).



Tab 3

--(1)-- --(2)-- --(3)-- --(4)-- --(5)-- --(6)--

Customer Name

Company Name

Billing Address ***

Check if it is the Same as Delivery Address

Delivery Address ***

*** Html Code can be used

The Billing Address and Delivery Address will normally show up in the final document WITHOUT the new line space. So for example if the address is:

Address line 1
Address line 2
Country

It will show up as

Address line 1 Address line 2 Country

To avoid this issue it's advised to use html (Hypertext Markup Language, a standardized system for tagging text files to achieve font, colour, graphic, and hyperlink effects on World Wide Web pages). So to have your address show up with new line space you need to add the html tags as shown below:

Address line 1

Address line 2

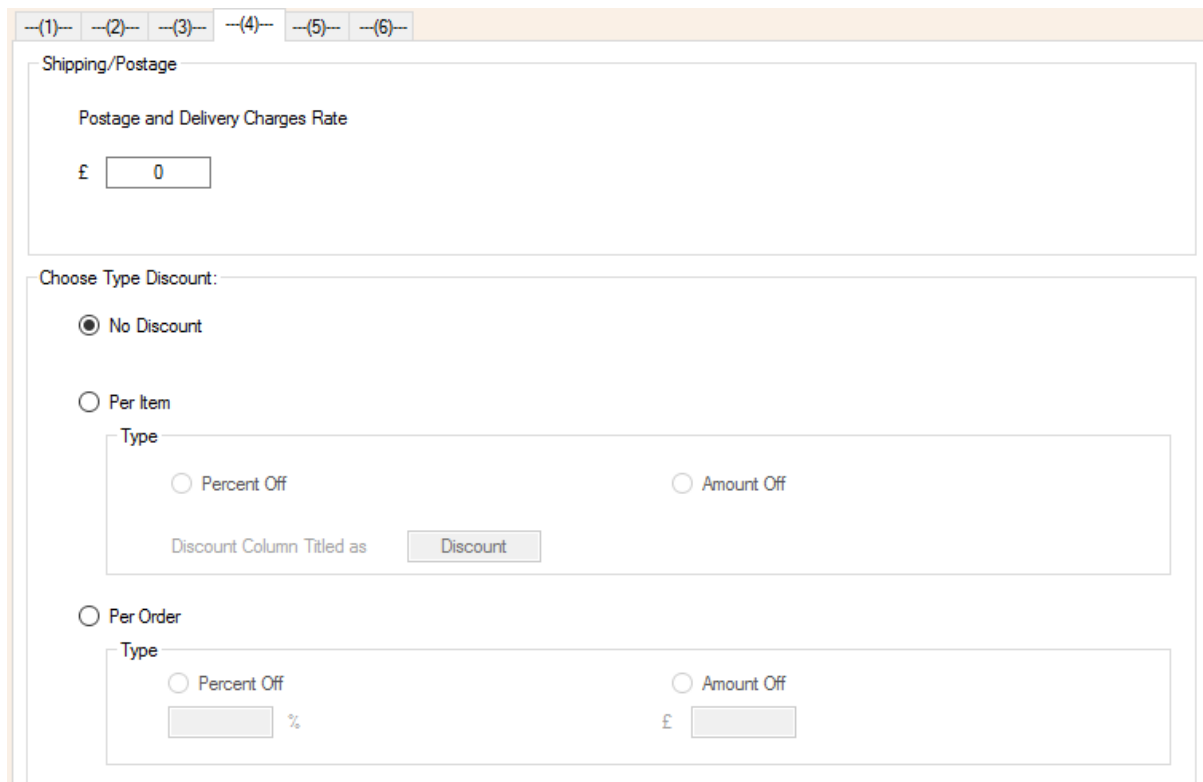
Country



The `
` tag here signify the html code for new line. If you are a pro in html you can do too much more!

Tab 4

The discount screen is where you can manage you can add the type of discount available.



The software defaults to “No Discount” option, the other two alternative can be applied either “Per Item” or “Per Order”

If “Per Item” method is selected, you have the option to either take a percentage off or a certain fixed amount of each item in your items list.

To enforce customisation throughout the software in this case a column for “Discount” is added to the next screen, the column can have a different custom title if needed. Change “Discount Column Titled as” text box to any name preferred. The change will also be carried out through to the generated document.

“Per Order” discount type allows you either take a discount percent of the full order or take a fixed discount price of the total order. I.e. this can be 20% or \$20



Tab 5

This is where you add the items that will appear in your document, as discussed earlier all information and labels can be customised. Also the currency can be changed from the [company setup screen](#).

--(1)-- --(2)-- --(3)-- --(4)-- --(5)-- --(6)--

Item

Units

Description

Each \$

Quantity

Amount \$

View Inventory

Item	Description	Quantity	Units	Each	Amount

Subtotal \$

Discount \$

Postage/Delivery Charges \$

Tax %

Total \$

If you have an inventory you by checking **View Inventory** , it should appear in the bottom left corner of the screen as shown below:

	Item	Description	Unit	Each	
▶	Item 1	Item 1 Description	1	12	Subtotal \$ <input type="text"/>
	Item 2	Item 2 Description	6	23	Discount \$ <input type="text"/>
	Item 3	Item 3 Description	1	9	Postage/Delivery Charges \$ <input type="text"/>
					Tax <input type="text" value="20"/> %
					Total \$ <input type="text"/>


Locked text boxes don't allow any alterations, some such as "Discount" is only enabled if there is a discount, and the Tax rate is a setting value that is set under the ["Tax settings screen"](#)

All yellow coloured fields are textboxes that can be changed, they will appear in the final document.




To add an item from the inventory select the item by clicking on it in the inventory grid. The action will populate the needed information in the text boxes provided. All you need to fill in is the quantity text box.



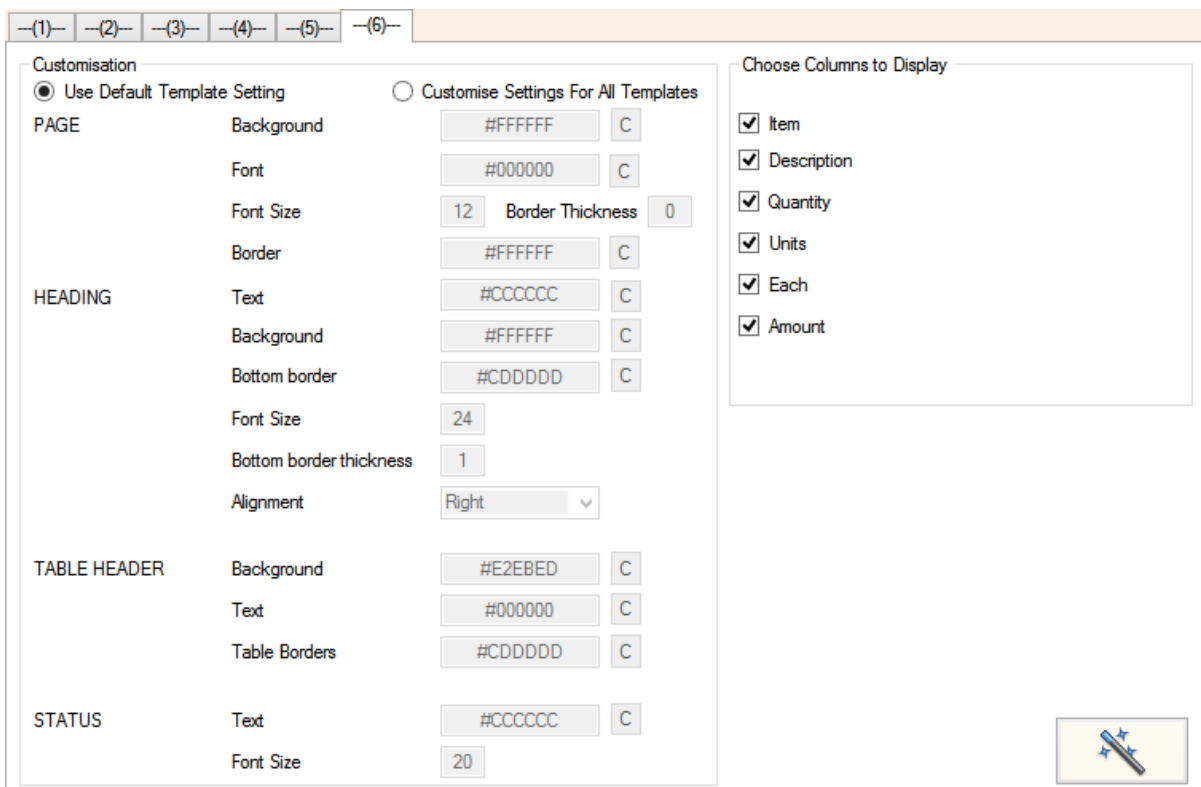
Click on  to add the item to the items grid.



Click on  to delete any item – first select the item row on the data grid then click on the button to remove the item from the item list

Tab 6

This is the last screen before generating any document, see below:



The software normally defaults to using the default template settings design however customisation is still available, if “Customise Settings for All Templates” is selected it will override any default settings and will use the settings specified for all available templates.

All buttons that are labelled “C” will open up the colour selection screen. Upon selecting a colour and clicking on the “OK” button, the html code for the colour will be displayed in the text box opposite to the defined label title, all colours are in html code format, they can be found on internet.



Below is a basic list of colour codes that can be used. Ensure you have the hash “#” in front of the code.

000000	000033	000066	000099	0000CC	0000FF
003300	003333	003366	003399	0033CC	0033FF
006600	006633	006666	006699	0066CC	0066FF
009900	009933	009966	009999	0099CC	0099FF
00CC00	00CC33	00CC66	00CC99	00CCCC	00CCFF
00FF00	00FF33	00FF66	00FF99	00FFCC	00FFFF
333300	333333	333366	333399	3333CC	3333FF
336600	336633	336666	336699	3366CC	3366FF
339900	339933	339966	339999	3399CC	3399FF
33CC00	33CC33	33CC66	33CC99	33CCCC	33CCFF
33FF00	33FF33	33FF66	33FF99	33FFCC	33FFFF
660000	660033	660066	660099	6600CC	6600FF
663300	663333	663366	663399	6633CC	6633FF
666600	666633	666666	666699	6666CC	6666FF
669900	669933	669966	669999	6699CC	6699FF
66CC00	66CC33	66CC66	66CC99	66CCCC	66CCFF
66FF00	66FF33	66FF66	66FF99	66FFCC	66FFFF
990000	990033	990066	990099	9900CC	9900FF
993300	993333	993366	993399	9933CC	9933FF
996600	996633	996666	996699	9966CC	9966FF
999900	999933	999966	999999	9999CC	9999FF
99CC00	99CC33	99CC66	99CC99	99CCCC	99CCFF
99FF00	99FF33	99FF66	99FF99	99FFCC	99FFFF
CC0000	CC0033	CC0066	CC0099	CC00CC	CC00FF
CC3300	CC3333	CC3366	CC3399	CC33CC	CC33FF
CC6600	CC6633	CC6666	CC6699	CC66CC	CC66FF
CC9900	CC9933	CC9966	CC9999	CC99CC	CC99FF
CCCC00	CCCC33	CCCC66	CCCC99	CCCCCC	CCCCFF
CCFF00	CCFF33	CCFF66	CCFF99	CCFFCC	CCFFFF
FF0000	FF0033	FF0066	FF0099	FF00CC	FF00FF
FF3300	FF3333	FF3366	FF3399	FF33CC	FF33FF
FF6600	FF6633	FF6666	FF6699	FF66CC	FF66FF
FF9900	FF9933	FF9966	FF9999	FF99CC	FF99FF
FFCC00	FFCC33	FFCC66	FFCC99	FFCCCC	FFCCFF
FFFF00	FFFF33	FFFF66	FFFF99	FFFFCC	FFFFFF



The “Choose Columns to Display” is mainly dependent on your document type selection in “Tab 1” and the labels are pulled from the custom definitions that were defined in Invoice, Quotations or Purchase order settings.

Choose Columns to Display

- Item
- Description
- Quantity
- Units
- Each
- Amount



Once all the information has been provided click on  to preview the document.



Document Preview Screen

Based on [Tab 6](#) settings the software should generate a screen preview of the document as shown below, the screen will normally load with your default template selected from the list box on the right hand side of the screen providing that you have setup a default template, details of how to do that are provided under the [template settings section](#):

INVOICE

logo

My Company
 Example Street, London, SW1, UK
 T: +442080000 | F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com

Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground

Billing Address		Delivery Address	
Customer Name		Customer Name	
Company Name		Company Name	
Billing Address line 1		Delivery Address line 1	
Billing Address line 2		Delivery Address line 2	
Post Code		Post Code	
Country		Country	

Item	Description	Quantity	Units	Each	Amount
Item1	Item 1 Description	25	1	12	300.00
Item 2	Item 2 Description	25	6	23	575.00
Item 3	Item 3 Description	25	1	9	225.00
Subtotal					\$1,100.00
Postage/Delivery Charges					\$200
Tax					20%
Total					\$1,560.00

Templates list:
 Template1.oss
 Template2.oss
 Template3.oss
 Template4.oss
 Template5.oss
 Template6.oss
 Template7.oss
 Template8.oss
 Template9.oss

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The software will generate all templates based on their default settings, if the “Customise settings for all templates” option box is selected in [Tab 6 settings screen](#) the software will use the custom settings defined for all templates.

The screen shots below provides a view of all generated templates for with their default settings.



Preview

INVOICE

logo

My Company
 Example Street, London, SW1, UK
 T: +442080000| F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com

Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground

Billing Address		Delivery Address	
Customer Name	Company Name	Customer Name	Company Name
Billing Address line 1	Billing Address line 2	Delivery Address line 1	Delivery Address line 2
Post Code	Country	Post Code	Country

Item	Description	Quantity	Units	Each	Amount
Item1	Item 1 Description	25	1	12	300.00
Item 2	Item 2 Description	25	6	23	575.00
Item 3	Item 3 Description	25	1	9	225.00
Subtotal					\$1,100.00
Postage/Delivery Charges					\$200
Tax					20%
Total					\$1,560.00

Templates

- Template1.oss
- Template2.oss
- Template3.oss
- Template4.oss
- Template5.oss
- Template6.oss
- Template7.oss
- Template8.oss
- Template9.oss

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Preview

INVOICE

logo

My Company
 Example Street, London, SW1, UK
 T: +442080000| F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com

Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground

Billing Address		Delivery Address	
Customer Name	Company Name	Customer Name	Company Name
Billing Address line 1	Billing Address line 2	Delivery Address line 1	Delivery Address line 2
Post Code	Country	Post Code	Country

Item	Description	Quantity	Units	Each	Amount
Item1	Item 1 Description	25	1	12	300.00
Item 2	Item 2 Description	25	6	23	575.00
Item 3	Item 3 Description	25	1	9	225.00
Subtotal					\$1,100.00
Postage/Delivery Charges					\$200
Tax					20%
Total					\$1,560.00

Templates

- Template1.oss
- Template2.oss
- Template3.oss
- Template4.oss
- Template5.oss
- Template6.oss
- Template7.oss
- Template8.oss
- Template9.oss

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Preview

INVOICE

logo

My Company
 Example Street, London, SW1, UK
 T: +442080000 | F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com


Billing Address
 Customer Name
 Company Name
 Billing Address line 1
 Billing Address line 2
 Post Code
 Country

Delivery Address
 Customer Name
 Company Name
 Delivery Address line 1
 Delivery Address line 2
 Post Code
 Country

Templates

- Template1.oss
- Template2.oss
- Template3.oss
- Template4.oss
- Template5.oss
- Template6.oss
- Template7.oss
- Template8.oss
- Template9.oss

Save | Print | Email | Cancel


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PENDING

Terms 30 Days

Date	06 March 2014
Due Date	07 April 2014
Entered By	Contact Name

Preview

INVOICE

My Company
 Example Street, London, SW1, UK
 T: +442080000 | F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com


Billing Address
 Customer Name
 Company Name
 Billing Address line 1
 Billing Address line 2
 Post Code
 Country

Delivery Address
 Customer Name
 Company Name
 Delivery Address line 1
 Delivery Address line 2
 Post Code
 Country

Templates

- Template1.oss
- Template2.oss
- Template3.oss
- Template4.oss
- Template5.oss
- Template6.oss
- Template7.oss
- Template8.oss
- Template9.oss

Save | Print | Email | Cancel


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PENDING

Terms 30 Days

Date	06 March 2014
Due Date	07 April 2014
Entered By	Contact Name
Document Number	INV-ABC000-1236
Account Number	A0009876



Preview

INVOICE

logo

My Company
 Example Street, London, SW1, UK
 T: +442080000 | F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com

Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground

Billing Address

Customer Name
 Company Name
 Billing Address line 1
 Billing Address line 2
 Post Code
 Country

Item	Description	Quantity	Units	Each	Amount
Item 1	Item 1 Description	25	1	12	300.00
Item 2	Item 2 Description	25	6	23	575.00
Item 3	Item 3 Description	25	1	9	225.00
Subtotal					\$1,100.00
Postage/Delivery Charges					\$200
Tax					20%
Total					\$1,560.00

Templates

- Template 1.oss
- Template 2.oss
- Template 3.oss
- Template 4.oss
- Template 5.oss
- Template 6.oss
- Template 7.oss
- Template 8.oss
- Template 9.oss

Icons: Save, Print, Email, Cancel

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Preview

INVOICE

logo

My Company
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 T: +442080000 | F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com

Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground

Billing Address

Customer Name
 Company Name
 Billing Address line 1
 Billing Address line 2
 Post Code
 Country

Item	Description	Quantity	Units	Each	Amount
Item 1	Item 1 Description	25	1	12	300.00
Item 2	Item 2 Description	25	6	23	575.00
Item 3	Item 3 Description	25	1	9	225.00
Subtotal					\$1,100.00
Postage/Delivery Charges					\$200
Tax					20%
Total					\$1,560.00

Templates

- Template 1.oss
- Template 2.oss
- Template 3.oss
- Template 4.oss
- Template 5.oss
- Template 6.oss
- Template 7.oss
- Template 8.oss
- Template 9.oss

Icons: Save, Print, Email, Cancel

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Save - stores the document and allow it to be searchable.



Save As Default Template – Sets the template selected as default one.



Print current template – uses your default printer



Preview in internet web browser



Close current window

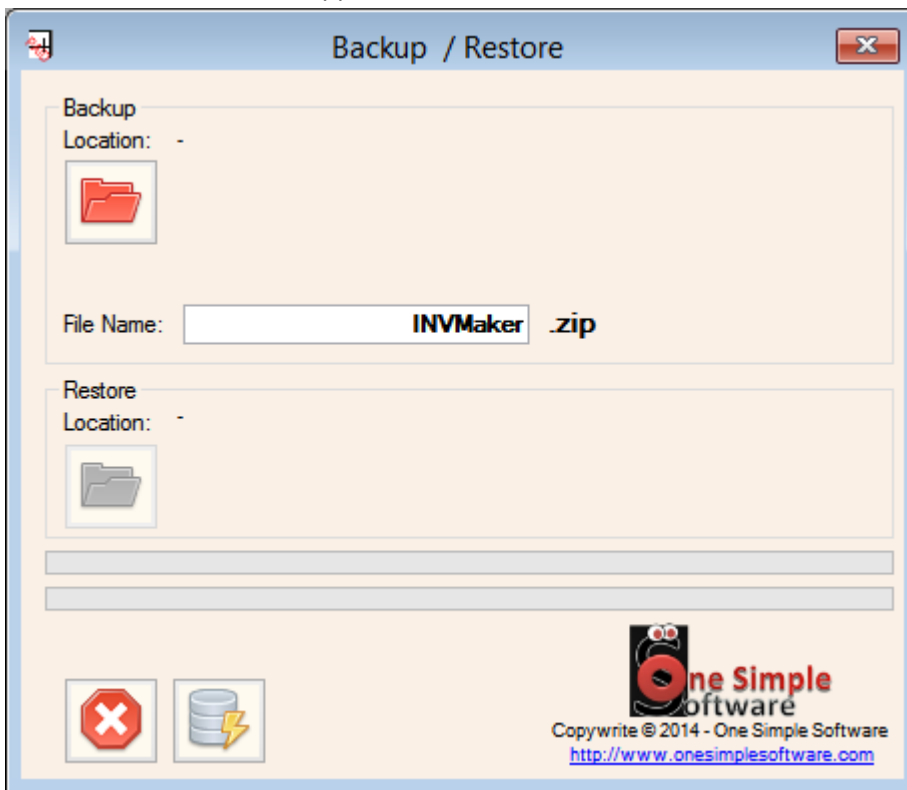
Backup Settings

This feature provides a backup of all your files, settings and documents including all companies created. The backup create a compressed zip file that can be opened with any zip file tool. It's recommended to keep the file in the same structure generated so that the software restore feature can restore the file correctly.

The feature can be accessed from the main screen by clicking on the “Backup” Button



The screen below should appear:



To use the feature,

1. Define the location of the backup by clicking on the “Red Folder” button, make sure you have write permission to the location specified
2. Enter the name of the file
3. Click on the button located at the bottom of the screen.





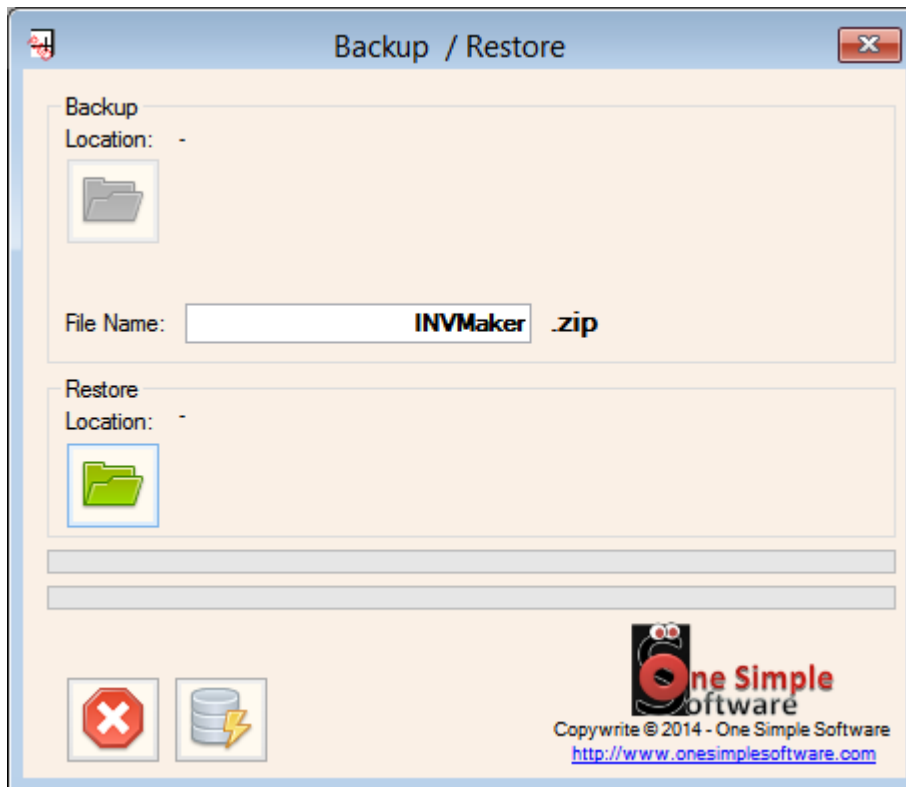
Restore Settings

This feature will restore a compatible backup file to the software database. The restoration will overwrite any settings you have made!

To access this feature, click on the restore button on the main screen.



The screen below should appear:



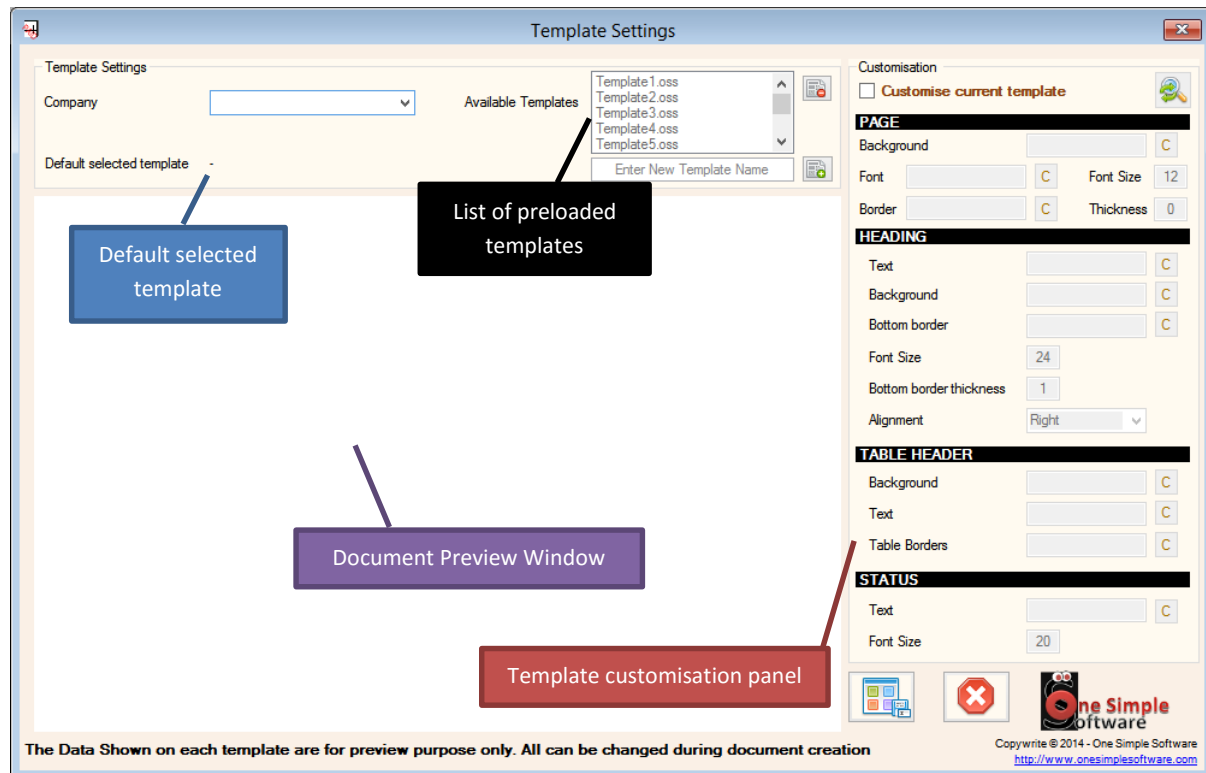
To restore a file (Must be a zip file generated by this software! – other zip file could cause problems to the software data structure)


1. Click on the “Green Folder” button and navigate with explorer to the file
2. Click on the button located at the bottom of the screen.




Template Settings

Template setting screen should appear as shown below:




 Delete selected template – the delete action is irreversible

Note: preloaded templates are available for all companies you add however if a template is delete then it will not be available for any of the companies you create.

 Creates a new template based on the selected one – you must enter a template name before clicking on this button. Also a company must be selected for this action to work.

 Save template also sets the template as default for the selected company.

 Refresh preview window – only active when customisation is being implemented.


To enable template customisation – first create a template or select a template then check the “Customise current template” check box, make the customisation and save the template.



Templates structure

This is a basic template structure, every template has some differences and you can also design your own template



	General Description	Label to Change in order to customise	Location
Zone 1	Example Document	Document Type <input type="text" value="Invoice"/>	Document creation Tab 1
Zone 3	Company Name	Business Name: <input type="text"/>	Company Manager
	Company Address	Address: <input type="text"/> Telephone: <input type="text"/> Fax: <input type="text"/> Email Address: <input type="text"/> Website Address: <input type="text"/>	Company Manager
	Logo	Logo: 	Company Manager
	Title 1	Date <input type="text" value="06 March 2014"/>	Document creation Tab 1
Zone 2	Title 2	Due Date <input type="text" value="07 April 2014"/>	Document creation Tab 2
	Title 3	Entered By <input type="text" value="Contact Name"/>	Document creation Tab 1
	Title 4	Document Number <input type="text" value="INV-ABC000-1236"/>	Document creation Tab 1
	Title 5	Account Number <input type="text" value="A0009876"/>	Document creation Tab 2
	Title 6	Order Number <input type="text"/>	Document creation Tab 2
	Title 7	Shipping Method <input type="text" value="Ground"/>	Document creation Tab 2



Zone 5	Title Text	Billing Address <input type="text"/> Billing Address line 1 Billing Address line 2 Post Code Country Delivery Address <input type="text"/> Delivery Address line 1 Delivery Address line 2 Post Code Country	Document creation Tab 3
Zone 6	Item, Description, Quantity, Units, Price/Each, Amount Sub Total, Discount, Delivery Charge, Tax, Total	Item <input type="text"/> Description <input type="text"/> Quantity <input type="text"/> Units <input type="text"/> Each \$ <input type="text"/> Amount \$ <input type="text"/> Subtotal \$ 1,100.00 Discount \$ <input type="text"/> Postage/Delivery Charges \$ 200 Tax <input type="text"/> % Total \$ 1,560.00	Document creation Tab 5 Document creation Tab 5
Zone 7	Currency	Currency: <input type="checkbox"/>	Company Manager
Zone 7	Example Title e.g. Terms	Terms <input type="text" value="30 Days"/>	Document creation Tab 2
Zone 8	Customer Message	Customer Message <input type="text" value="Your prompt payment of this invoice is greatly appreciated"/>	Document creation Tab 2
Zone 8	Payment Status	Payment Status <input type="text" value="Pending"/>	Document creation Tab 2



Template 1 Preview

EXAMPLE DOCUMENT

Your Company Name
 Your Company Address
 T: +440000000000 | F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text	Title Text
Customer Name Customer Company Name Customer Address	Customer Name Customer Company Name Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
Customer Message

PAYMENT STATUS

Template 2 Preview

EXAMPLE DOCUMENT

Your Company Name
 Your Company Address
 T: +440000000000 | F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text	Title Text
Customer Name Customer Company Name Customer Address	Customer Name Customer Company Name Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
Customer Message

PAYMENT STATUS



Template 3 Preview

EXAMPLE DOCUMENT

Your Company Name
 Your Company Address
 T: +440000000000| F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text		Title Text	
Customer Name	Customer Company Name	Customer Name	Customer Company Name
Customer Address		Customer Address	

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
Customer Message

PAYMENT STATUS

Template 4 Preview

EXAMPLE DOCUMENT

Your Company Name
 Your Company Address
 T: +440000000000| F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text		Title Text	
Customer Name	Customer Company Name	Customer Name	Customer Company Name
Customer Address		Customer Address	

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
Customer Message

PAYMENT STATUS



Template 5 Preview



EXAMPLE DOCUMENT

logo

Your Company Name
 Your Company Address
 T: +440000000000| F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title Text
 Customer Name
 Customer Company Name
 Customer Address

Title Text
 Customer Name
 Customer Company Name
 Customer Address

PAYMENT STATUS

Example Title e.g. Terms

Title 1	text
Title 2	text
Title 3	text
Title 4	text
Title 5	text

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Customer Message



Template 6 Preview



EXAMPLE DOCUMENT

Your Company Name
Your Company Address
T: +440000000000| F: +440000000000
sales@yourdomain.com
http://www.yourdomain.com

Title Text
Customer Name
Customer Company Name
Customer Address

Title Text
Customer Name
Customer Company Name
Customer Address

PAYMENT STATUS

Title 1	text
Title 2	text
Title 3	text
Title 4	text
Title 5	text

Example Title e.g. Terms

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Customer Message



Template 7 Preview



EXAMPLE DOCUMENT

logo

Your Company Name
 Your Company Address
 T: +440000000000| F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text

Customer Name
 Customer Company Name
 Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
 Customer Message

PAYMENT STATUS

Template 8 Preview

EXAMPLE DOCUMENT

logo

Your Company Name
 Your Company Address
 T: +440000000000| F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
 Title 2 text
 Title 3 text
 Title 4 text
 Title 5 text

Title Text

Customer Name
 Customer Company Name
 Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Example Title e.g. Terms
 Customer Message

PAYMENT STATUS



Template 9 Preview



EXAMPLE DOCUMENT

logo

Your Company Name
Your Company Address
T: +440000000000| F: +440000000000
sales@yourdomain.com
http://www.yourdomain.com

Title Text
Customer Name
Customer Company Name
Customer Address

Title Text
Customer Name
Customer Company Name
Customer Address

PAYMENT STATUS

Title 1	text
Title 2	text
Title 3	text
Title 4	text
Title 5	text

Example Title e.g. Terms

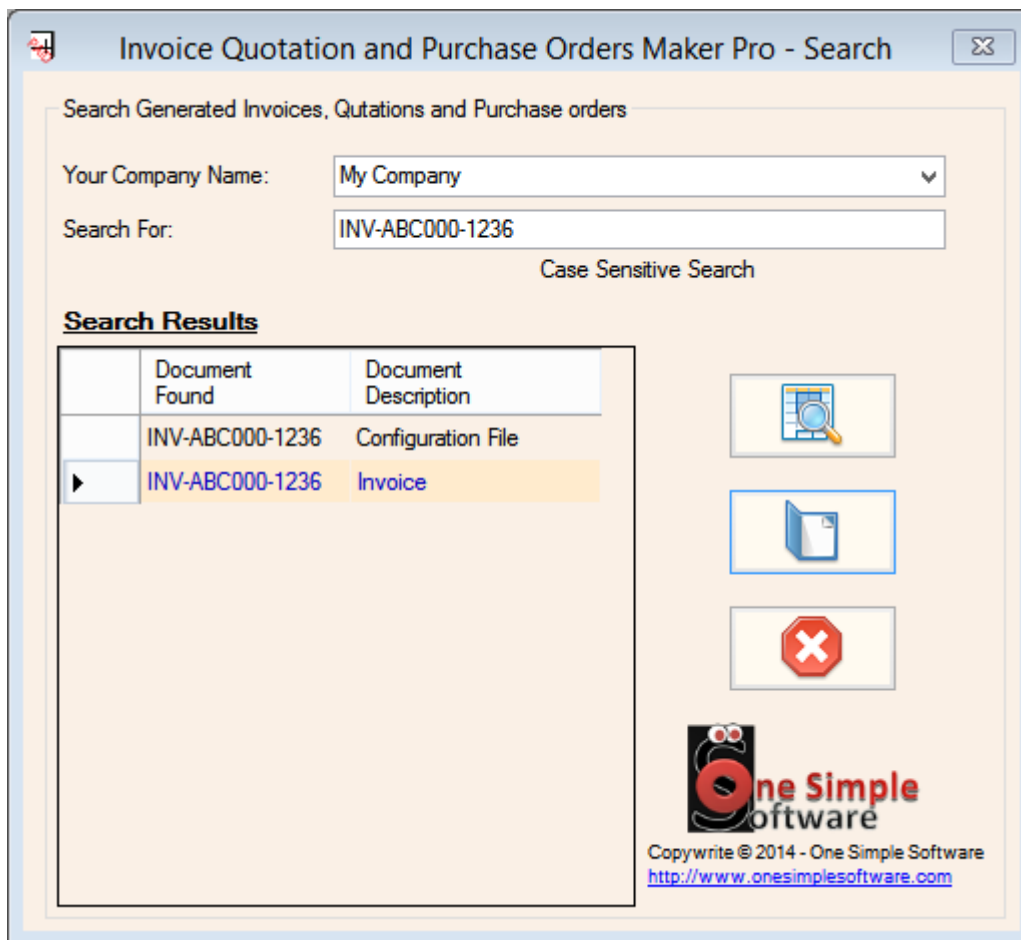
ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%
Total					£2580

Customer Message



Search

The search feature allows you to search the all invoices, quotations and purchase orders generated also any saved configuration files, the configuration files are generated when you click on save document information button [here](#). The button itself used to save your progress before generating any document.



Select a company name from the combo box, then enter the string that you want to search, you can search for document numbers if the document has been generated, for any name or company name. The search is case sensitive! And the search term need to be exactly the same as the value search for in the document.



Search Button




Close window



Open selected document –the button will open invoices, purchase orders and quotations in the preview window below. If a configuration file is to be opened, the software will load the configuration file values in the document creation screen.

Document Preview

INVOICE





My Company
 Example Street, London, SW1,
 UK
 T: +442080000| F: +442080000
 sales@yourdomain.com
 http://www.yourdomain.com


Date 06 March 2014
Due Date 07 April 2014
Entered By Contact Name
Document Number INV-ABC000-1236
Account Number A0009876
Shipping Method Ground


Billing Address		Delivery Address	
Customer Name		Customer Name	
Company Name		Company Name	
Billing Address line 1		Delivery Address line 1	
Billing Address line 2		Delivery Address line 2	
Post Code		Post Code	
Country		Country	


Item	Quantity	Units	Each	Amount
Item 1	25	1	12	300.00
Item 2	25	6	23	575.00
Item 3	25	1	9	225.00










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Back to search



Preview in internet browser



Print using your default printer



Close window



9.0 Tutorials

Tutorial 1: Step by step setup wizard – Preparing the software

Tutorial 2: Creating your first document

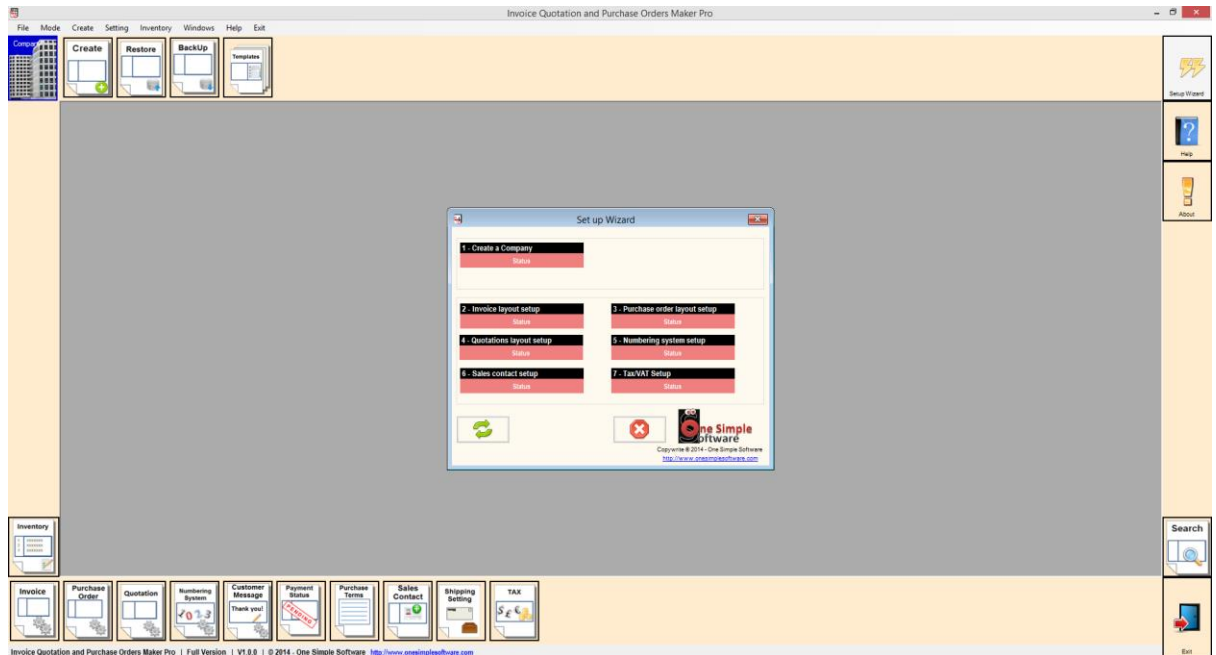
Tutorial 3: Template setup and customisation



Tutorial 1: Step by step setup wizard – Preparing the software

This tutorial will show you how to setup the software and prepare it for producing documents

- 1- Run the software
- 2- As the software loads you should see the screen below,



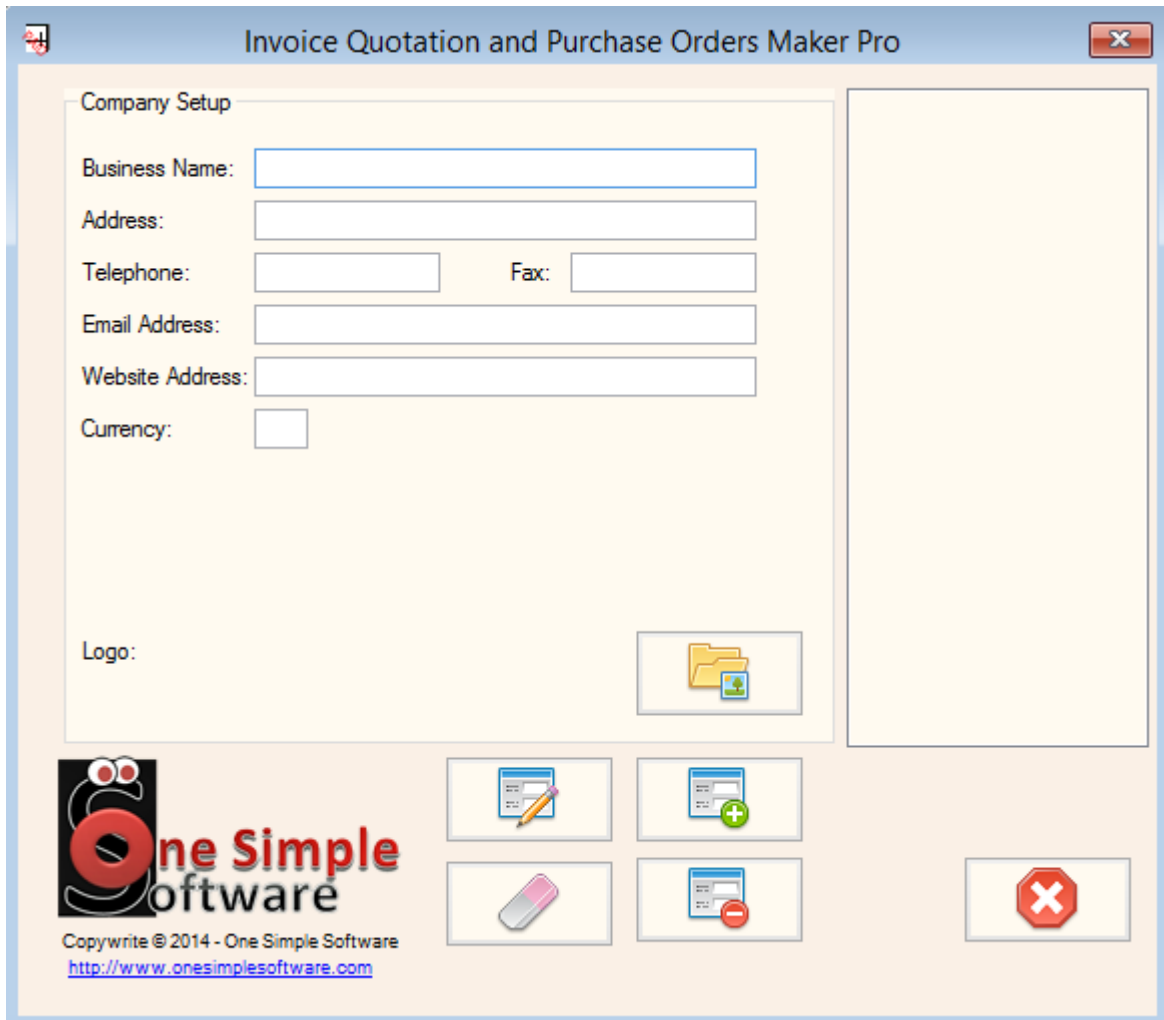
If this is your first run or never created a company, the software should load the setup wizard. The setup wizard can be accessed from the “Setup Wizard” button located on the right hand corner of the screen.

- All non-complete steps will remain with the red colour indicator
 - All setup wizard steps are numbered in order and must be setup in same order.
 - Some steps can be missed out and the software will use default settings to operate
 - “Create a Company” Step is essential for the software to run.
- 3- Hoover with your mouse cursor and click on “Create a Company”





4- The company creation window should appear as shown below



Fill in the information as shown below:

Business Name:	<input type="text" value="My Limited Company"/>		
Address:	<input type="text" value="10 Company Av, City Name, Post code"/>		
Telephone:	<input type="text" value="+44141000000"/>	Fax:	<input type="text" value="+44141111111"/>
Email Address:	<input type="text" value="sales@yourdomain.com"/>		
Website Address:	<input type="text" value="http://www.mylimitedcompany.com"/>		
Currency:	<input type="text" value="£"/>		



5- Select a company logo, to do this click on



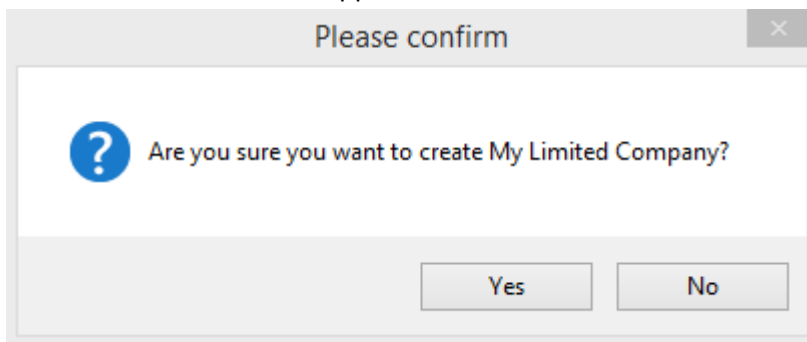
Load the default logo “logo.jpg” included under the software default installation directory, click on “open” button to continue, you should now have the logo as shown below:



6- Click on the save company details button to create the company folders



The window below should appear



Click on “yes” to create the company

The company we created should now be displayed on the right hand side list as shown in the screen shot



Invoice Quotation and Purchase Orders Maker Pro

Company Setup

Business Name:

Address:

Telephone: Fax:





Email Address:


Website Address:

Currency:

Logo:

My Limited Company



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If you want to make any changes “Select the company from the right hand side to display all the information we entered, then click on the action buttons as described below to perform the desired action”



Update edited content or update company information



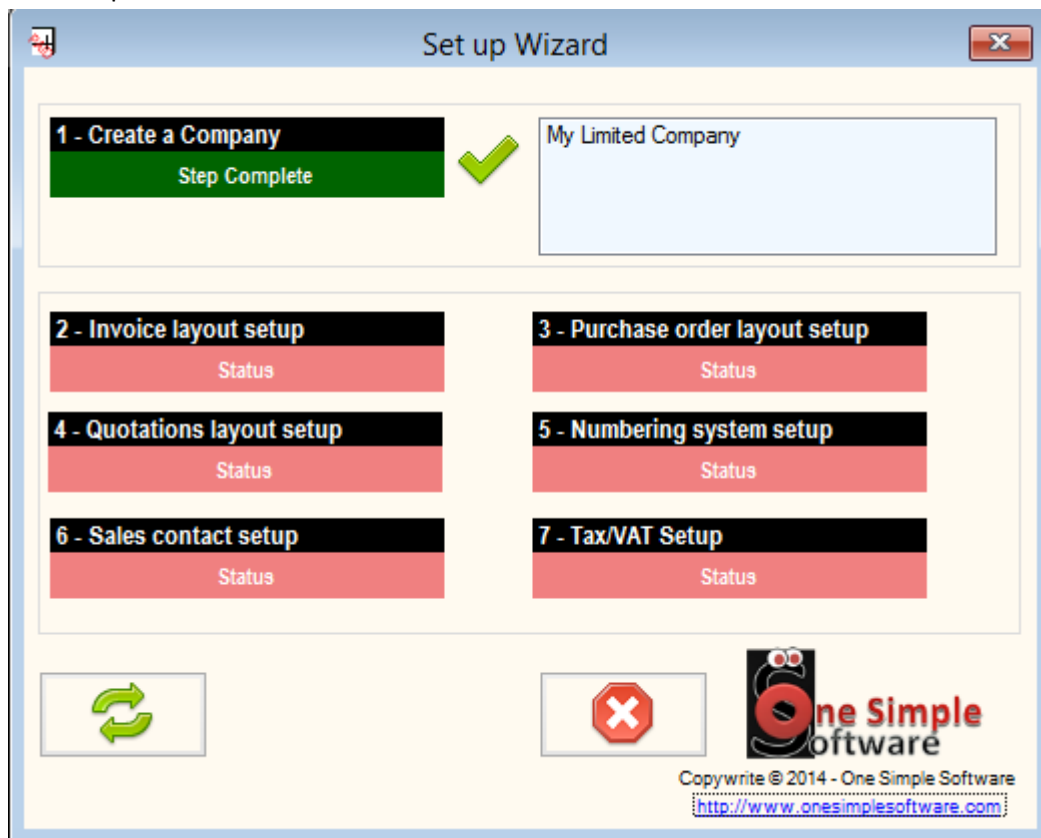
Delete selected company

7- Click on the “Close” button to close the window and go back to the Setup Wizard



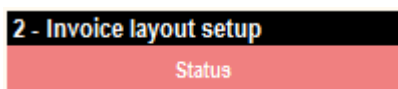


The setup wizard screen should look as shown below



A green tick indicates that the step has been completed. We can now move on the layout setup. The list box on the right hand side will hold all companies created. Each will have different setup status and to find a current status for a company all you need to do is to select the company from the list.

- 8- Click on "Invoice layout setup" to continue



The window below should appear




Invoice Quotation and Purchase Orders Maker Pro - Invoice Settings

Invoice Settings

Company Name:

Please choose Columns that will appear in the Invoice

<input checked="" type="checkbox"/> Display Item Column Titled as	<input type="text" value="Item"/>
<input checked="" type="checkbox"/> Display Description Column Titled as	<input type="text" value="Description"/>
<input checked="" type="checkbox"/> Display Quantity Column Titled as	<input type="text" value="Quantity"/>
<input checked="" type="checkbox"/> Display Unit Column Titled as	<input type="text" value="Units"/>
<input checked="" type="checkbox"/> Display Each Column Titled as	<input type="text" value="Each"/>
<input checked="" type="checkbox"/> Display Amount Column Titled as	<input type="text" value="Amount"/>


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9- Click on the combo box and select the company we have just created

Invoice Settings

Company Name:

Please choose Columns that will appear in the Invoice

<input checked="" type="checkbox"/> Item	<input type="text" value="Item"/>
<input checked="" type="checkbox"/> DescriptionCheckBox	<input type="text" value="Description"/>
<input checked="" type="checkbox"/> Quantity	<input type="text" value="Quantity"/>
<input checked="" type="checkbox"/> Units	<input type="text" value="Units"/>
<input checked="" type="checkbox"/> Each	<input type="text" value="Each"/>
<input checked="" type="checkbox"/> Amount	<input type="text" value="Amount"/>

The software will normally tick all columns to appear in the invoice, this is done by default but we can change this.



10- We can select the columns we want to show in our final invoice, we can also rename each column to suit our purpose.

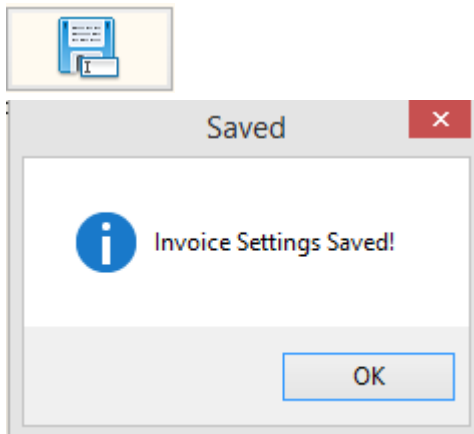
Alter the screen default settings to make it look as shown below:

Company Name:

Please choose Columns that will appear in the Invoice

<input type="checkbox"/> Item	<input type="text" value="Item"/>
<input checked="" type="checkbox"/> DescriptionCheckBox	<input type="text" value="Desc."/>
<input checked="" type="checkbox"/> Quantity	<input type="text" value="Qty."/>
<input checked="" type="checkbox"/> Units	<input type="text" value="Units"/>
<input type="checkbox"/> Each	<input type="text" value="Each"/>
<input checked="" type="checkbox"/> Amount	<input type="text" value="Price"/>

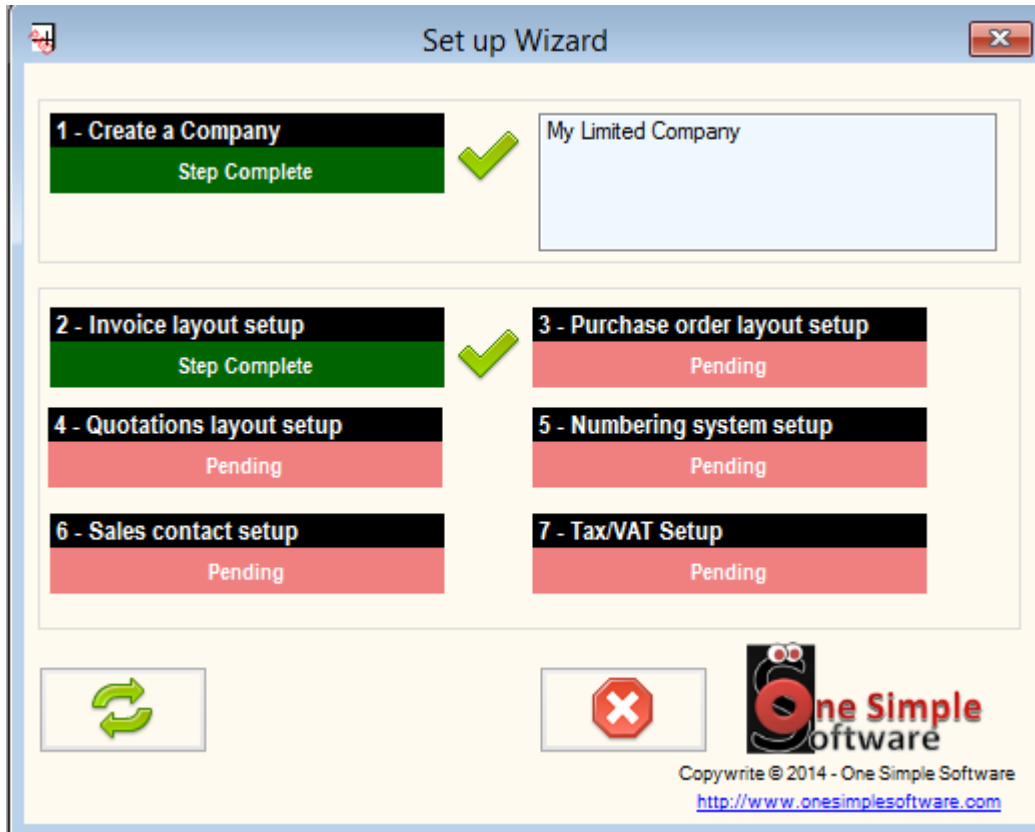
11- Click on the “Save” button to save the above settings



Click “OK” to continue

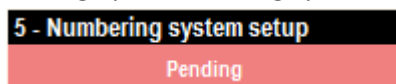


12- Click on the “Close” button to go back to the Setup wizard, the screen should now appear as shown below:



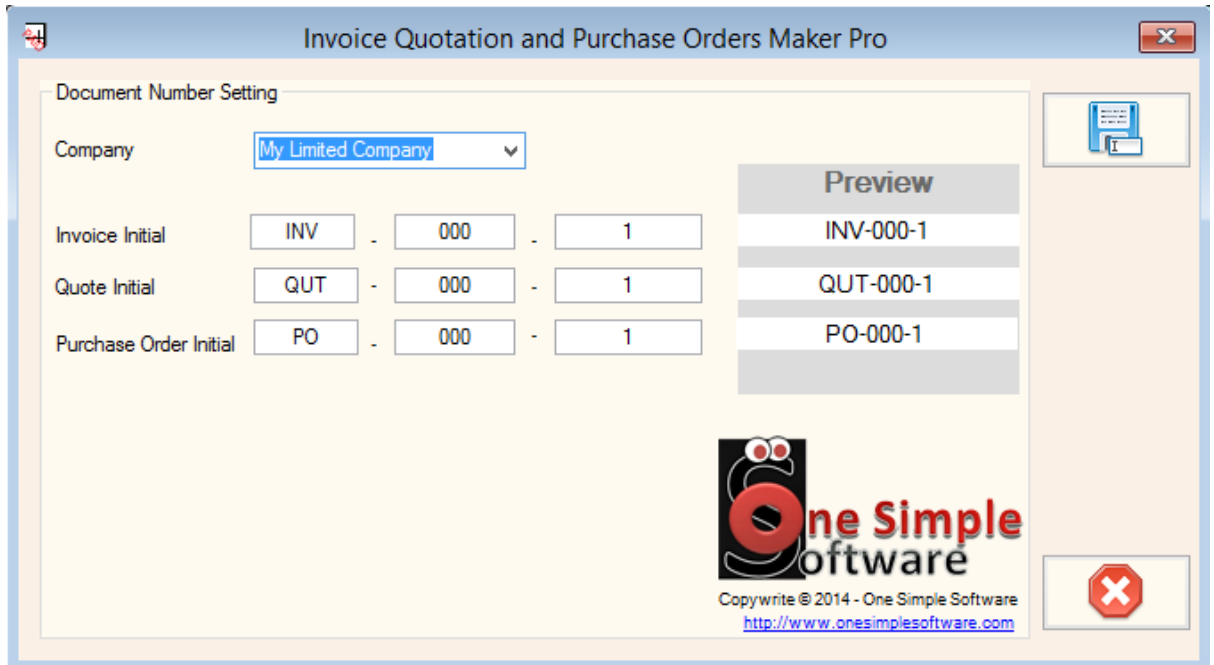
“Purchase order layout setup” and “Quotations layout setup” are done the same way as “Invoice layout setup”. For this company setup we are not going to generate any Quotations or Purchase orders. The settings can be altered at any time if needed.

13- Setting up a numbering system, continue by clicking on the “Numbering system setup” label



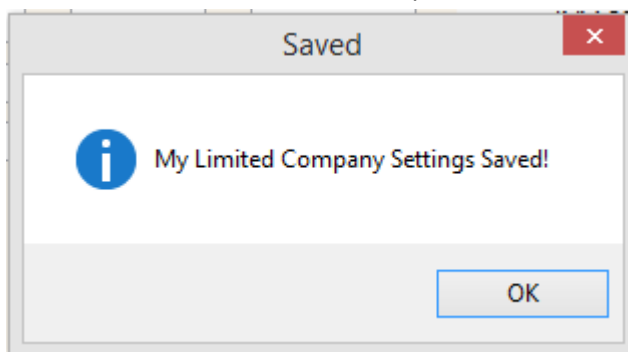


The screen below should appear



The numbering system can be customised providing that the last field MUST BE A NUMBER. The first and second fields can be letters, numbers or both combination. For the purpose of this tutorial we will not make any changes and we will accept the default settings.

14- Click on the “Save” button to accept the default settings for “My Limited Company”

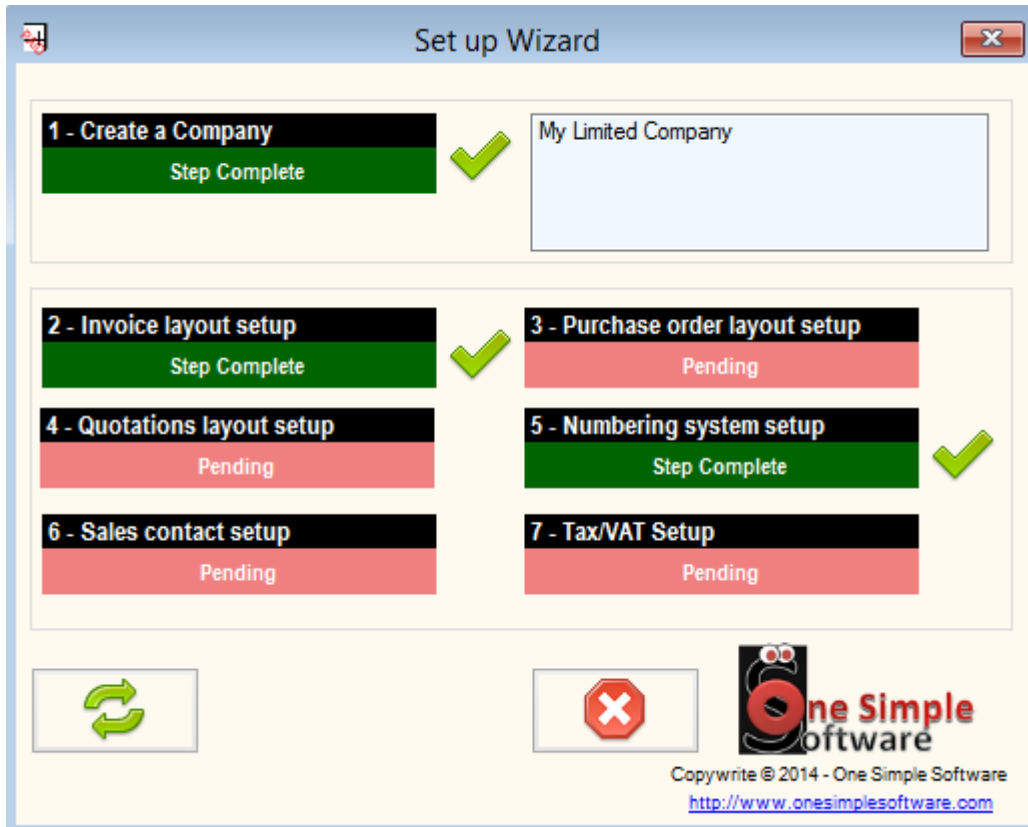


Click on “OK” to continue

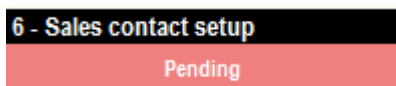
Click on the “Close” button to close the “Numbering System” window and continue to the “Setup Wizard”



The Setup wizard should now appear as shown below:



15- Click on “Sales contact setup”, this step is also optional. If you do use different departments or sales personnel then you can add all the names under this section.



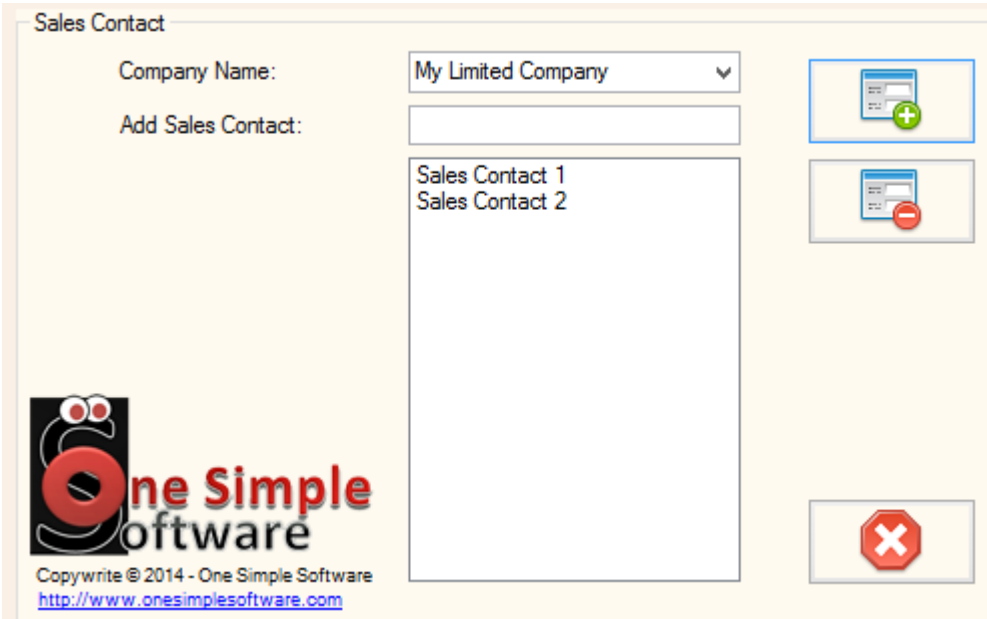
16- The Window below should appear



17- Simply enter a name then click on the “Add” button to add the contact to the list.



Repeat the process to add the sales contacts below:

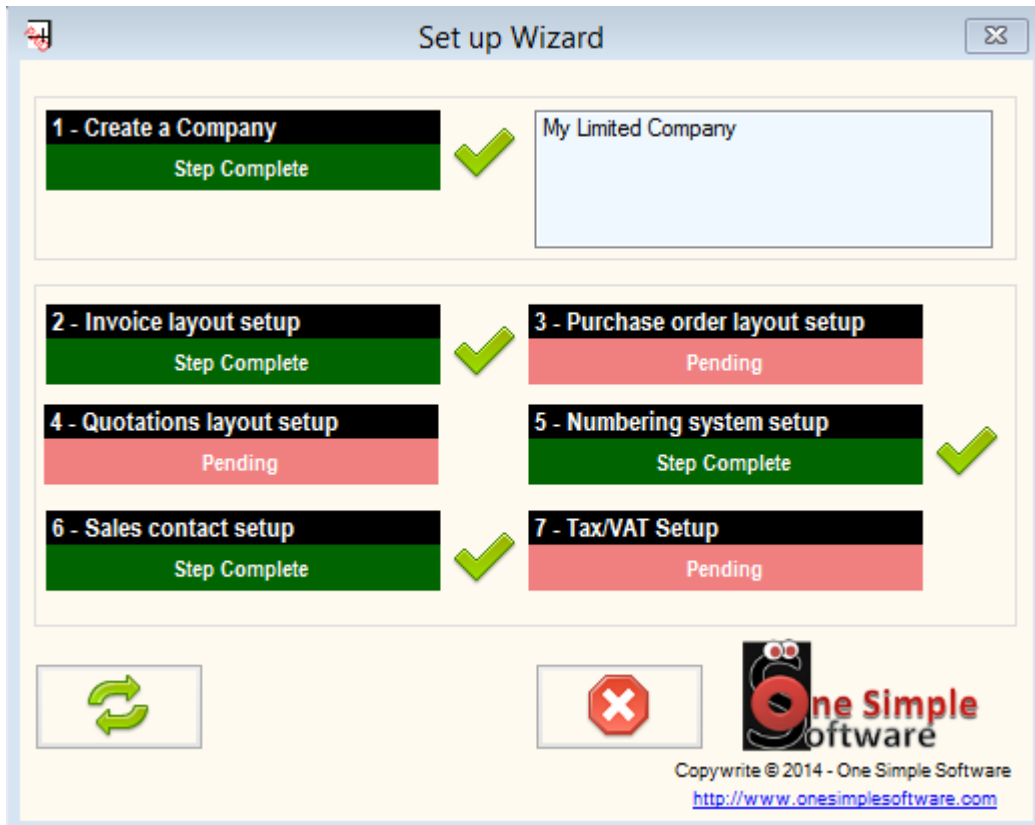




If you make a mistake or you want to permanently remove a contact from the list, click on the “Remove” button



18- Click on the “Close” Button to go back to the Setup Wizard

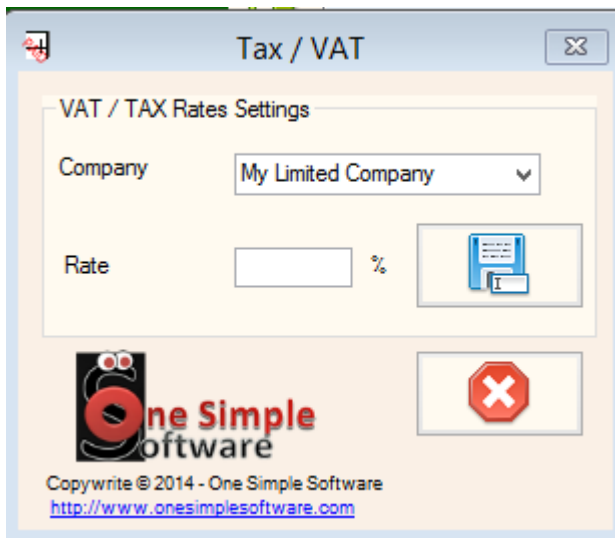




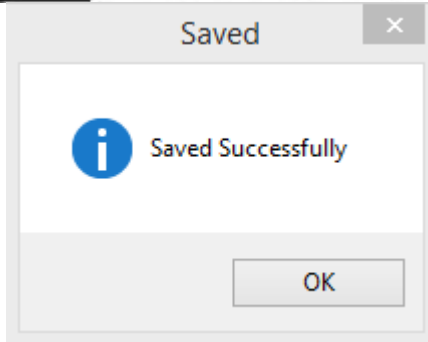
19- Set up the “Tax/VAT” rate, this is also optional, if you don’t want to set up you can ignore it.



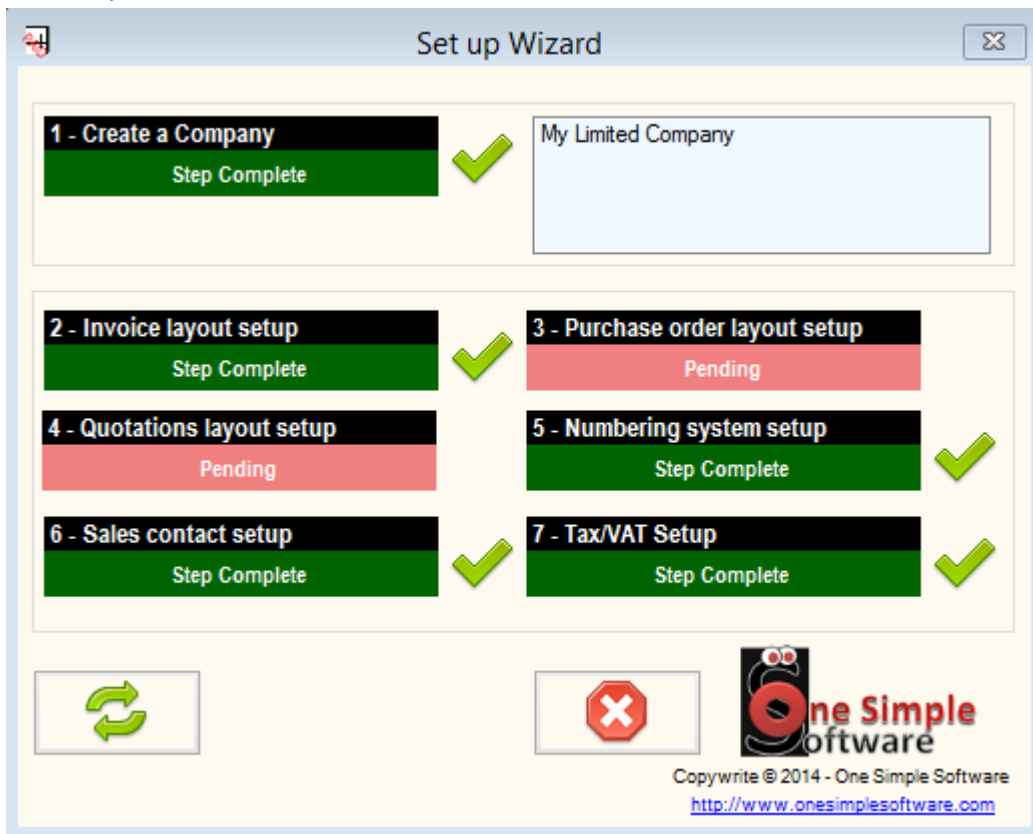
Click on the label “Pending” to open up the Tax setup screen as shown below



Enter 20 and click on the “Save” button to save the setting



Click on "OK" to continue,
Click on the "Close" button to go back to the Setup Wizard
The setup wizard screen should look as below:



We are now ready to generate our first Invoice,
You can now close the Setup Wizard screen.



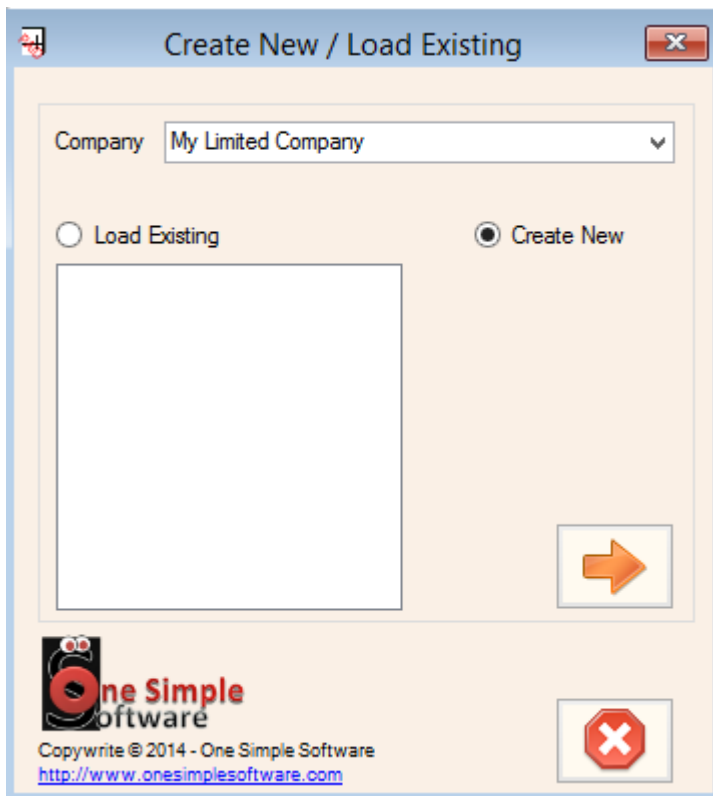
Tutorial 2: Creating Your First Document

This tutorial will describe how to create an Invoice using the software default templates, This Tutorial assumes that you have completed Tutorial 1

- 1- From the main screen, click on the “Create” button



The screen below should appear

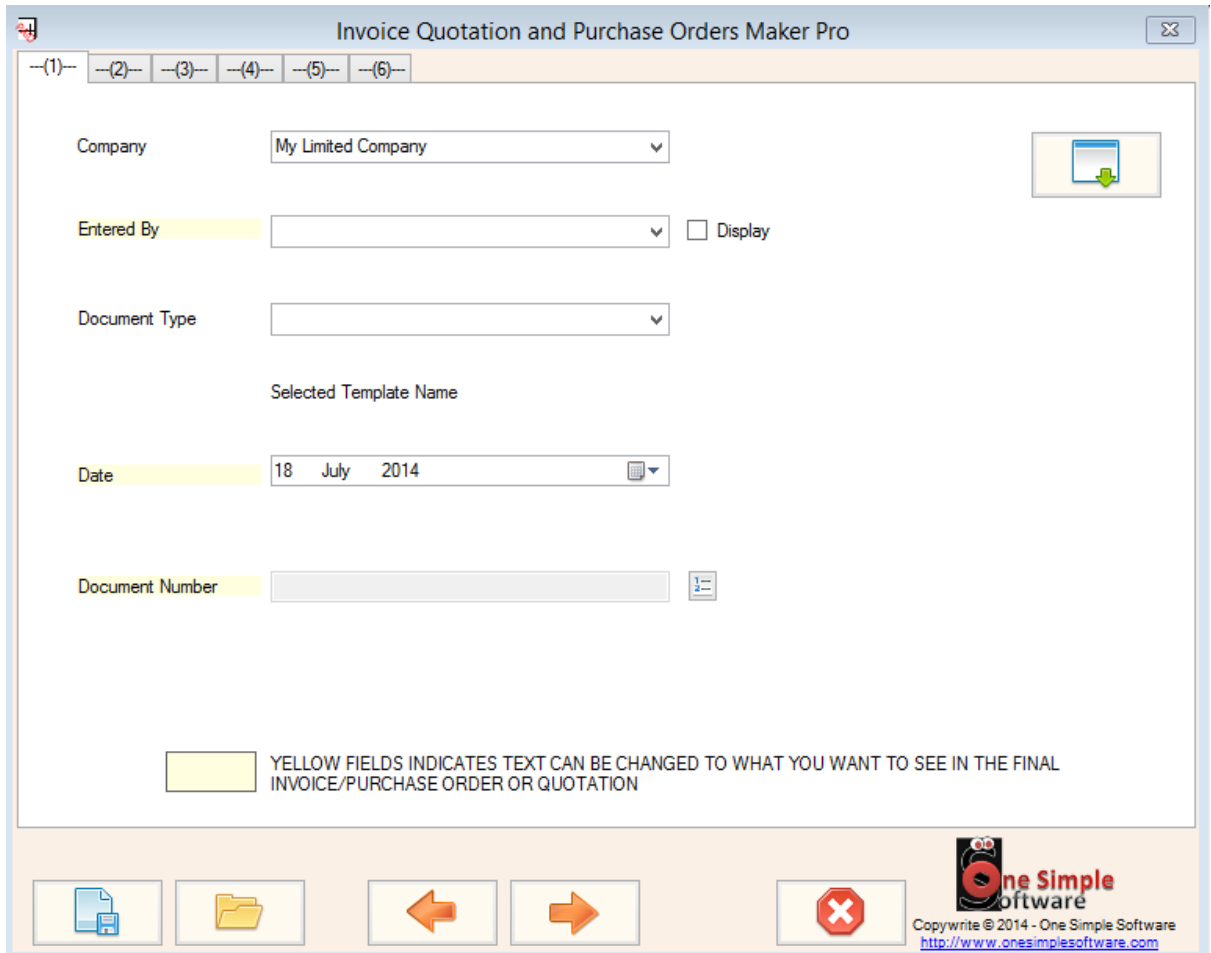


- 2- If no company is selected, select “My Limited Company” from the combo box shown on the screen.
- 3- Select “Create New” option box
- 4- Click on the “Next” arrow to continue





The screen below should appear



5- All yellow fields are mainly text boxes to allow flexibility, you can change them to whichever title suits, and any change implemented will appear on the final invoice generated.

We will select "Sales Contact 1"

Entered By Display

Sales Contact 1
Sales Contact 2

We will also check the "Display Check box" and Change the "Entered By" text to "By" as shown below:

By Display



6- Select the document type, in this case we are generating an Invoice

Document Type
Invoice
Quotation
Purchase Order

7- We need to generate a document number or an invoice number in this case

Document Number

Click on the button to generate a number and change the text “Document Number” to “Invoice No. ” as shown below:

Invoice No.

8- Click on the “Next” Arrow to continue



Screen 2 should now appear as shown below:

--(1)-- --(2)-- --(3)-- --(4)-- --(5)-- --(6)--

Due Date Display

Terms Display

Account Number Display

Order Number Display

Payment Status Display

Shipping Method Display

Customer Message

9- Make the following changes shown below:

Account No. Display

Payment Status Display



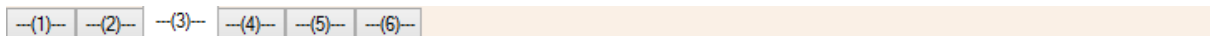
Ship By Display

Customer Message

10- Click on the "Next" Arrow to continue



The screen below will appear



Customer Name

Company Name

Billing Address ***

Check if it is the Same as Delivery Address

Delivery Address ***

*** Html Code can be used

Fill in the information as shown on the screen below:



Customer Name

Company Name

Billing Address ***

Check if it is the Same as Delivery Address

Delivery Address ***

Note: you can use the code
 for new line. The software will not display
 at the end of the line, this small html code tells the software to use new line break.

11- Click on the "Next" Arrow to continue



12- Keep the no discount setting

No Discount

13- Click on the "Next" Arrow to continue





The screen below should appear

Item Desc. Qty.
 Units Each £ Price £

View Inventory

Item	Desc.	Qty.	Units	Each	Price

Subtotal £
 Discount £
 Postage/Delivery Charges £
 Tax %
 Total £

14- Enter the item as shown below:

Item Desc. Qty.
 Units Each £ Price £

15- Click on the "Add" Button to add the item to the grid



16- Repeat steps so that you have the final looking grid as shown below:

Item	Desc.	Qty.	Units	Each	Price
▶ SKU0001	Product 1	1	1 per pack	7.99	7.99
SKU0002	Product 2	1	1 per pack	4.89	4.89
SKU0003	Product 3	2	4 per pack	3.99	7.98



17- We will not charge any postage fee so enter 0 in the Postage/Delivery Charge

18- The screen should appear as shown below

Item Desc. Qty.
 Units Each £ Price £

Item	Desc.	Qty.	Units	Each	Price
▶ SKU0001	Product 1	1	1 per pack	7.99	7.99
SKU0002	Product 2	1	1 per pack	4.89	4.89
SKU0003	Product 3	2	4 per pack	3.99	7.98

Subtotal	£	20.86
Discount	£	
Postage/Delivery Charges	£	0
Tax		20 %
Total	£	25.03

19- Click on the "Next" Arrow to continue





20- Now you should see the customisation screen below


Customisation

Use Default Template Setting Customise Settings For All Templates

PAGE	Background	<input type="text" value="#FFFFFF"/>	<input type="button" value="C"/>
	Font	<input type="text" value="#000000"/>	<input type="button" value="C"/>
	Font Size	<input type="text" value="12"/>	Border Thickness <input type="text" value="0"/>
	Border	<input type="text" value="#FFFFFF"/>	<input type="button" value="C"/>
HEADING	Text	<input type="text" value="#CCCCCC"/>	<input type="button" value="C"/>
	Background	<input type="text" value="#FFFFFF"/>	<input type="button" value="C"/>
	Bottom border	<input type="text" value="#CDDDDD"/>	<input type="button" value="C"/>
	Font Size	<input type="text" value="24"/>	
	Bottom border thickness	<input type="text" value="1"/>	
	Alignment	<input type="text" value="Right"/>	<input type="button" value="v"/>
TABLE HEADER	Background	<input type="text" value="#E2EBED"/>	<input type="button" value="C"/>
	Text	<input type="text" value="#000000"/>	<input type="button" value="C"/>
	Table Borders	<input type="text" value="#CDDDDD"/>	<input type="button" value="C"/>
STATUS	Text	<input type="text" value="#CCCCCC"/>	<input type="button" value="C"/>
	Font Size	<input type="text" value="20"/>	

Choose Columns to Display

- Item
- Desc.
- Qty.
- Units
- Each
- Price

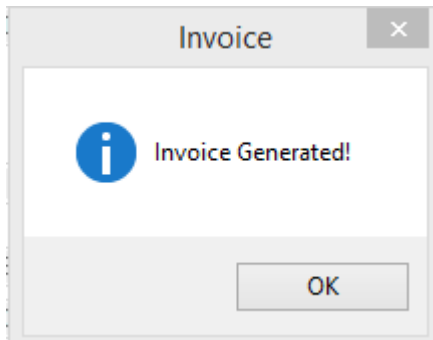


Note: "Choose Columns to Display" is set up based on what we have chosen to display for Invoices in Tutorial 1, you can change that if you want to see more columns if you prefer We will use the "Default Template Setting" for the customisation section.

Click on the "Preview/Print" button to continue



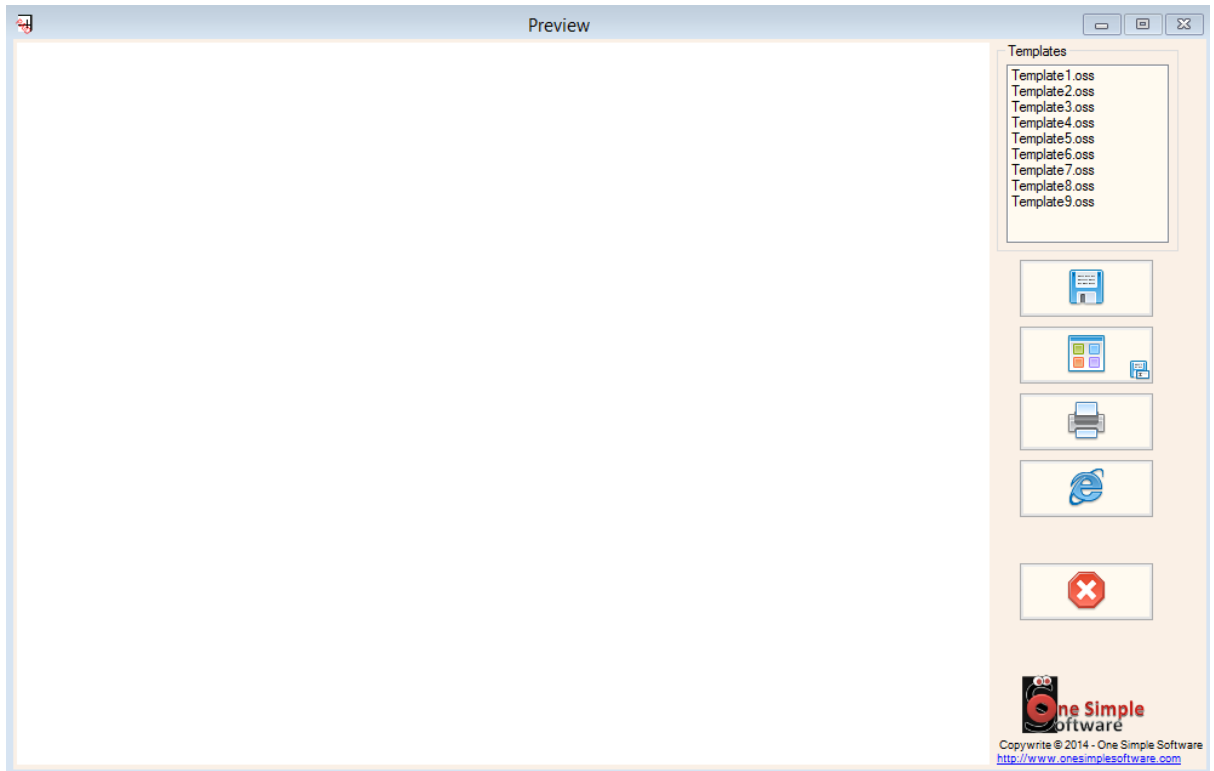
The Message below will be displayed



Click on "OK" to continue



The Preview screen will now appear as shown below:



Select "Template 8" from the list of Templates presented on the right hand side,



You now see the invoice generated as shown below:

INVOICE

My Limited Company
 10 Company Av, City Name, Post code
 T: +441411111111| F: +44141000000
 sales@yourdomain.com
 http://www.mylimitedcompany.com

Date 18 July 2014
By Sales Contact 1
Invoice No. INV-000-2
Account No. ABC1234567
Ship By DHL

Billing Address

Customer Name
 Company Ltd
 123 Address line 1
 Address line 2
 City - Post code
 Country

Desc.	Qty.	Units	Price
Product 1	1	1 per pack	7.99
Product 2	1	1 per pack	4.89
Product 3	2	4 per pack	7.98
Subtotal			£20.86
Postage/Delivery Charges			£0
Tax			20%
Total			£25.03

Thank you for your Business

PAID

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Templates

- Template 1.oss
- Template 2.oss
- Template 3.oss
- Template 4.oss
- Template 5.oss
- Template 6.oss
- Template 7.oss
- Template 8.oss
- Template 9.oss

Note: the alterations we made to the text boxes earlier on are now displayed on the right corner of the screen.

There are few options presented here:



Save - stores the document and allow it to be searchable.



Save As Default Template – Sets the template selected as default one.



Print current template – uses your default printer



Preview in internet web browser

This concludes this Tutorial.

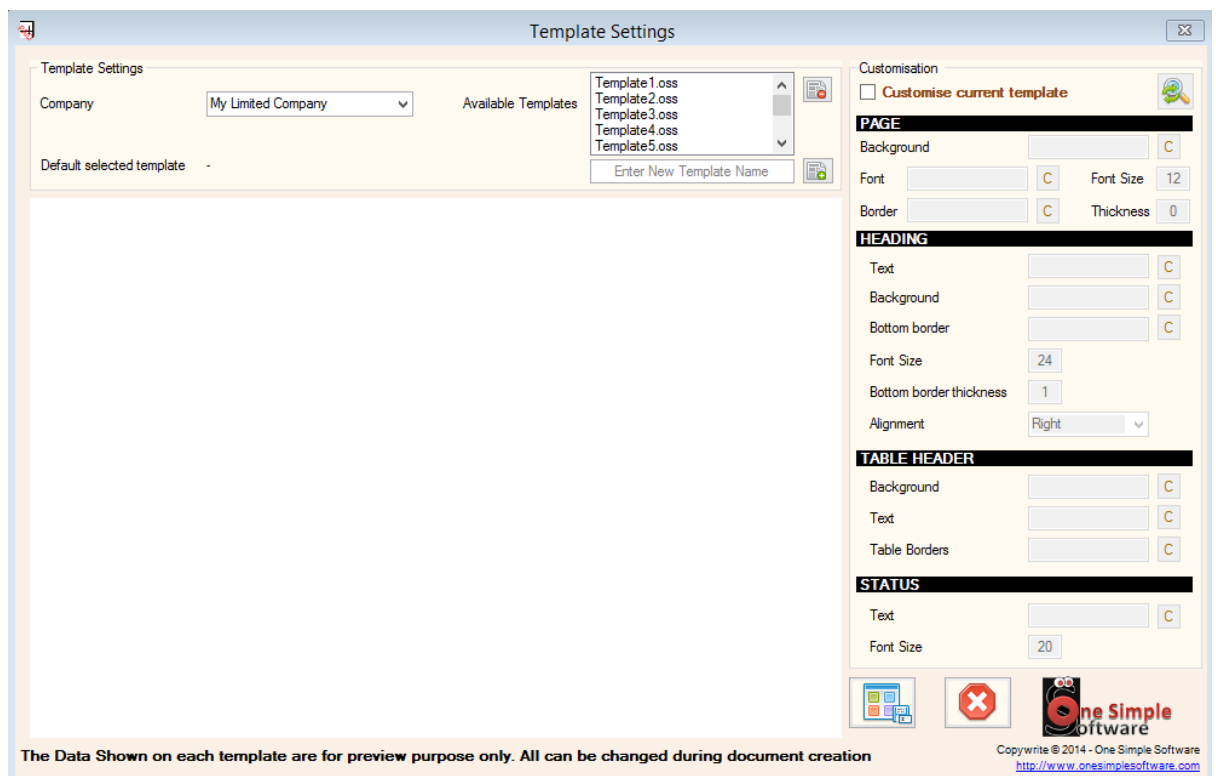
Tutorial 3: Template Setup and Customisation

This Tutorial will show you how to create a new template for using in the software. The Tutorial assumes that you have completed the basic setup or completed Tutorial 1

- 1- Click on the “Templates” Button from the main screen to open up the template customisations window.



- 2- Select the company name from the combo box, we will select the company we created in Tutorial 1



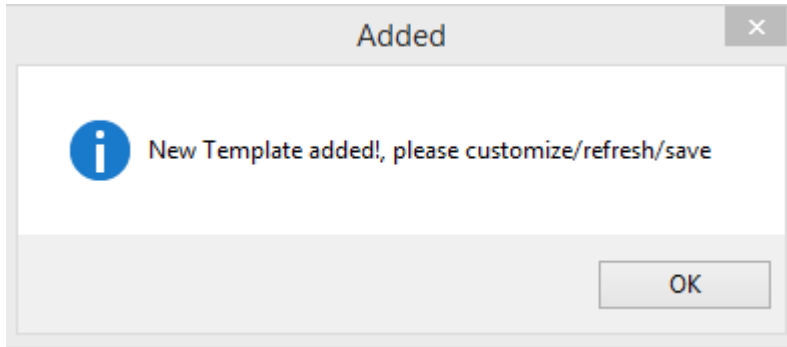
- 3- We need to base the customisation on a template so we will select Template 8 from the list of available templates as basis for the customisation
- 4- Enter the New Template name, we will call it “My new template”



5- Click on the add template button



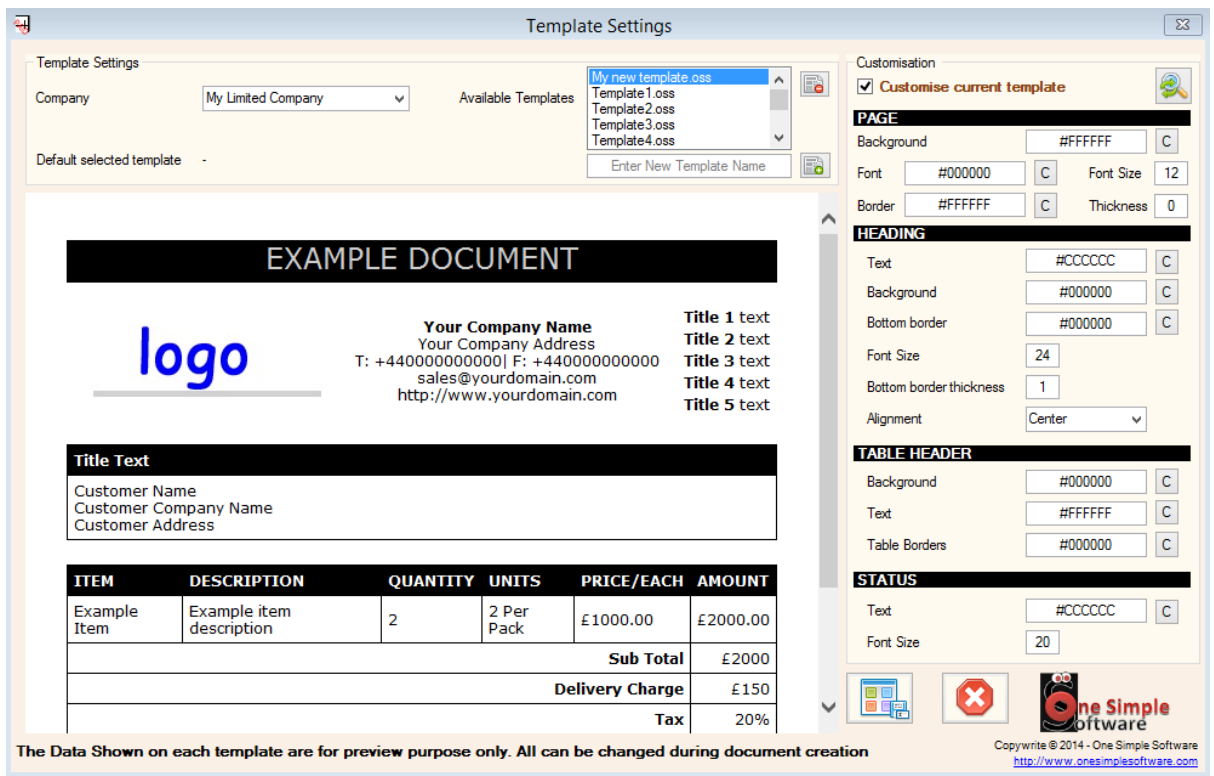
The message below will appear



Click on "OK" to continue

6- Check "Customise current template"

The screen should now look as below:



Template Settings

Company: My Limited Company | Available Templates: My new template.oss, Template1.oss, Template2.oss, Template3.oss, Template4.oss

Default selected template: -

Enter New Template Name: []

EXAMPLE DOCUMENT

logo

Your Company Name
Your Company Address
T: +440000000000 | F: +440000000000
sales@yourdomain.com
http://www.yourdomain.com

Title 1 text
Title 2 text
Title 3 text
Title 4 text
Title 5 text

Title Text
Customer Name
Customer Company Name
Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%

The Data Shown on each template are for preview purpose only. All can be changed during document creation

Customisation

Customise current template

PAGE

Background: #FFFFFF | C

Font: #000000 | C | Font Size: 12

Border: #FFFFFF | C | Thickness: 0

HEADING

Text: #CCCCCC | C

Background: #000000 | C

Bottom border: #000000 | C

Font Size: 24

Bottom border thickness: 1

Alignment: Center

TABLE HEADER

Background: #000000 | C

Text: #FFFFFF | C

Table Borders: #000000 | C

STATUS

Text: #CCCCCC | C

Font Size: 20

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- 7- The customisation process is simple, we need colour codes to be able to change the colours on the template, there is a comprehensive list available in this help file, [click here](#) to see. You can also click on the buttons labelled "C" to select a colour.

Please note: not all variables under the customisation are changeable, this mainly depends on the template selected

Make the changes as shown below:

Customisation

Customise current template 

PAGE

Background

Font Font Size

Border Thickness

HEADING

Text

Background

Bottom border

Font Size

Bottom border thickness

Alignment

TABLE HEADER

Background

Text

Table Borders

STATUS

Text

Font Size

- 8- Click on the refresh button to see the changes





The template will now look as shown below

EXAMPLE DOCUMENT

Your Company Name
 Your Company Address
 T: +440000000000 | F: +440000000000
 sales@yourdomain.com
 http://www.yourdomain.com

Title 1 text
Title 2 text
Title 3 text
Title 4 text
Title 5 text

Title Text

Customer Name
 Customer Company Name
 Customer Address

ITEM	DESCRIPTION	QUANTITY	UNITS	PRICE/EACH	AMOUNT
Example Item	Example item description	2	2 Per Pack	£1000.00	£2000.00
Sub Total					£2000
Delivery Charge					£150
Tax					20%

Total	£2580
--------------	-------

Example Title e.g. Terms
 Customer Message

PAYMENT STATUS

To set this template as a default template click on the button shown below



The template we just create should be available to select for future use.

This concludes the customisation tutorial