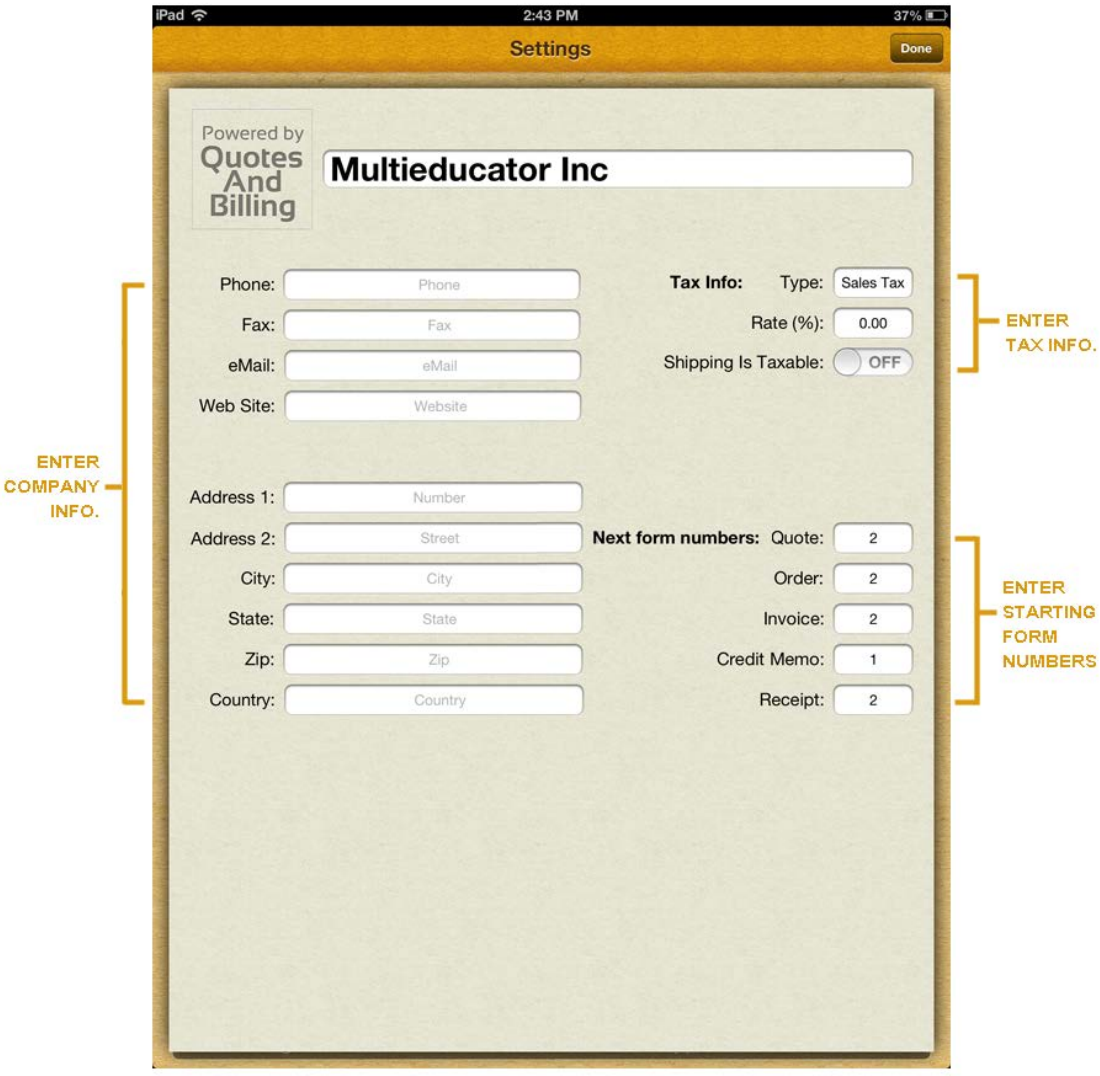
Using QUOTES & BILLING

QUICK START...

You can do most of the main work in the program directly from this main screen. When you select the **+ BUTON** you can create new **Quotes, Orders** and **Invoices,** as well as accept payments. The **SETTINGS BUTTON** gives you access to the key settings screen. The **SEARCH BOX** allows you search for a specific Quote, Order and Invoices. You can **ADD customers,** and **inventory items** either as you create a quote, or by selecting the **FILE TRAY** at the top of the screen.

GETTING STARTED

STEP 1: Enter the set up to select your settings.
STEP 2: Enter the basic information on your company



STEP 3: Enter your **TAX TYPE** (e.g. Sales Tax, V.A.T.) and enter the **TAX RATE**.
(NOTE: If there is tax on shipping, then switch the "**SHIPPING ON TAXABLE"** to "**YES**").
STEP 4: Enter the starting number for your **QUOTES, ORDERS and INVOICES**.

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.

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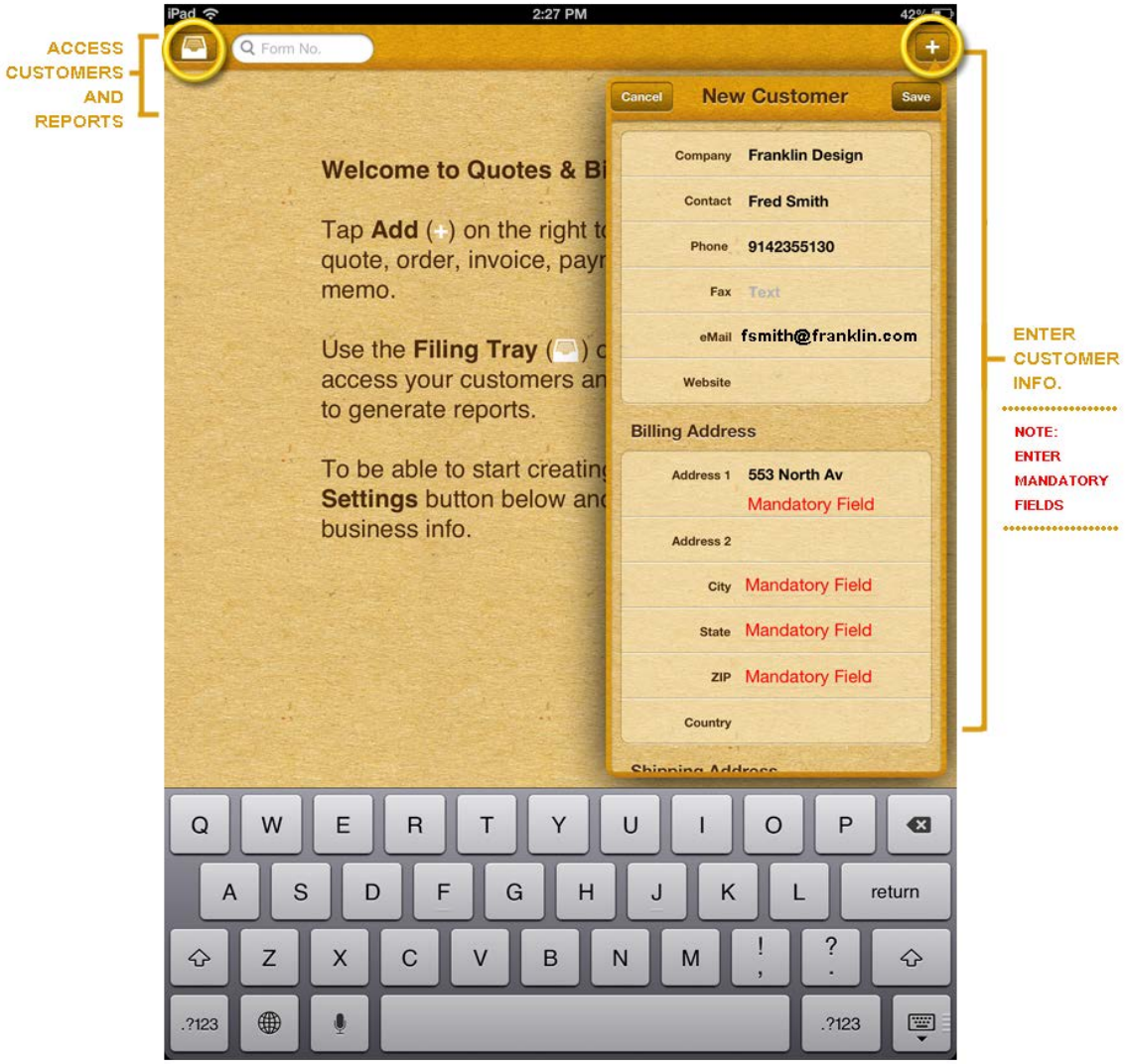
The Main activities of the program can be accessed from the program's **Main Screen** (see below). This is where you select the activity you want to implement:

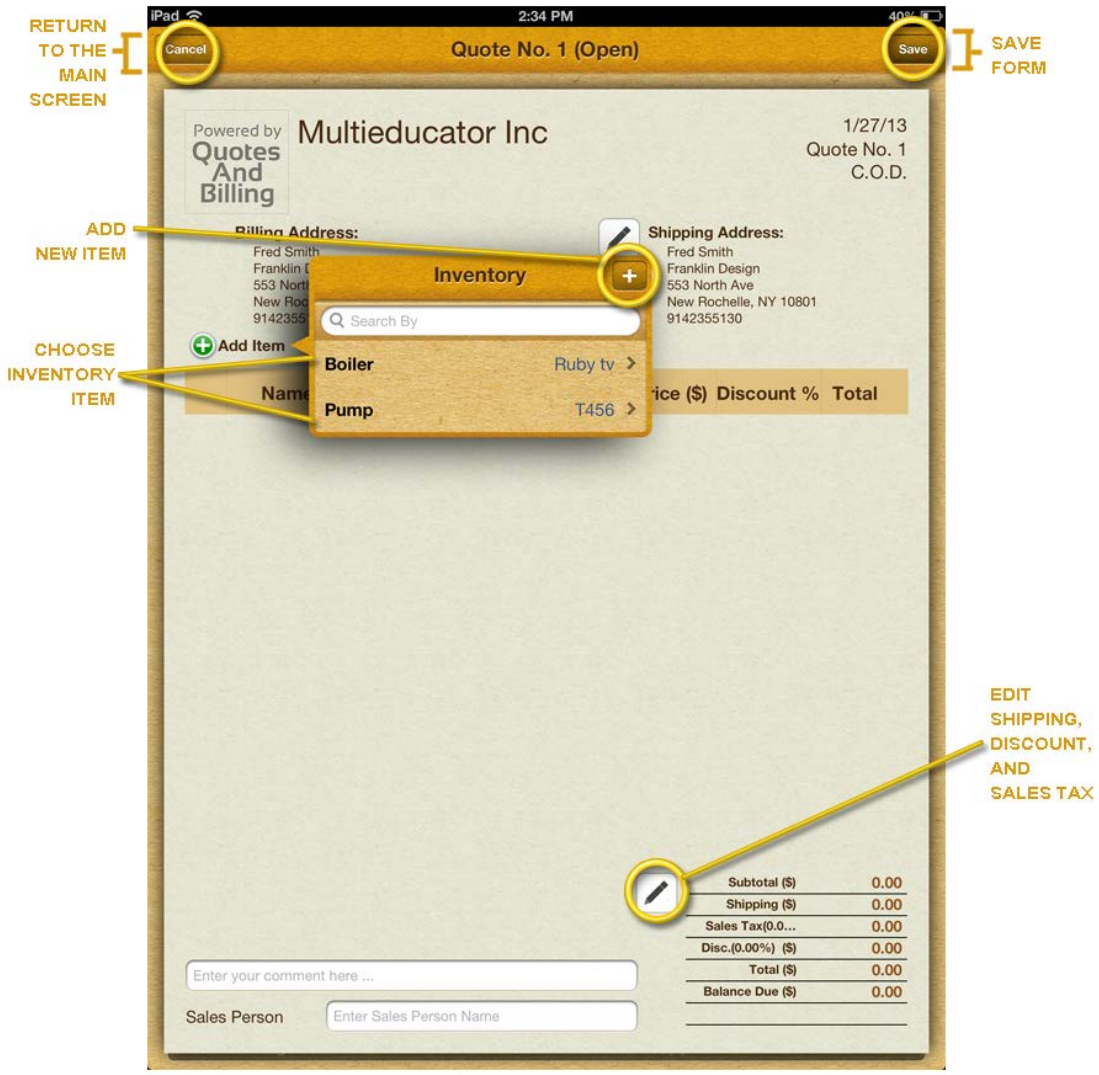
Choose whether you want to:

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

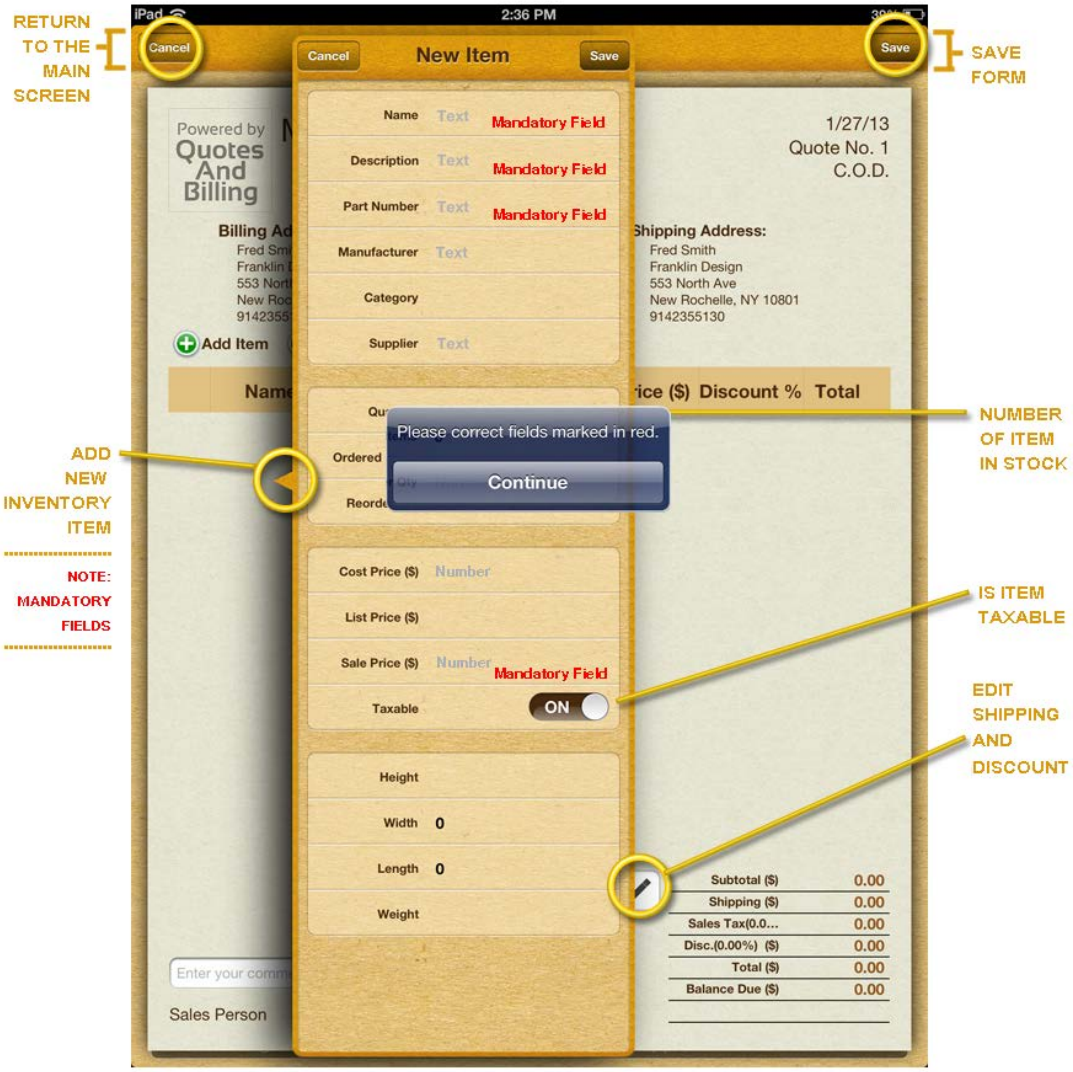
NEXT

Choose an existing customer or add a new customer.
You can add separate billing and shipping addresses.
Billing addresses are mandatory.





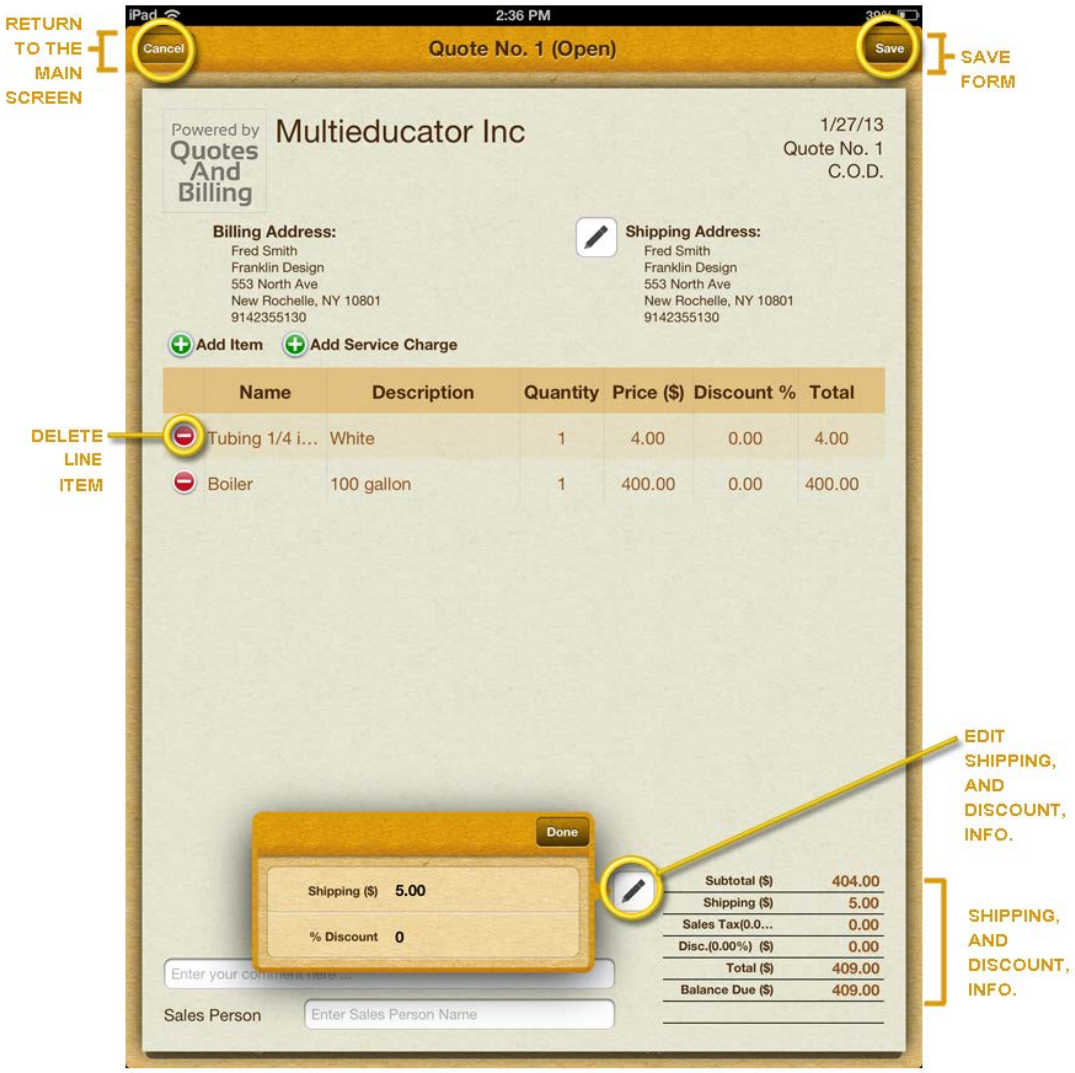
After **creating a customer**, you will come to the **INVOICE screen**.
There you have a choice of entering either **inventory items** or **service items.**
Inventory items can be tracked.
Service items are can be hourly items, or other items you do not want track.
If the item you want to add is not currently in your inventory,
then select the **PLUS BUTTON** to add a new inventory item.



Enter the information on an item. 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 the item in stock.
Ordered items: itemizes the number of an item on an order
Reorder Quantity: Highlights at the level you reorder items.
Cost: Catalogues what you pay for an item
List price: Specifies the manufacturers suggested retail price of an item.
Sales price: Indicates the price at which you sell the item.
Taxable: stipulates whether or not the item is taxable when you sell it.

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

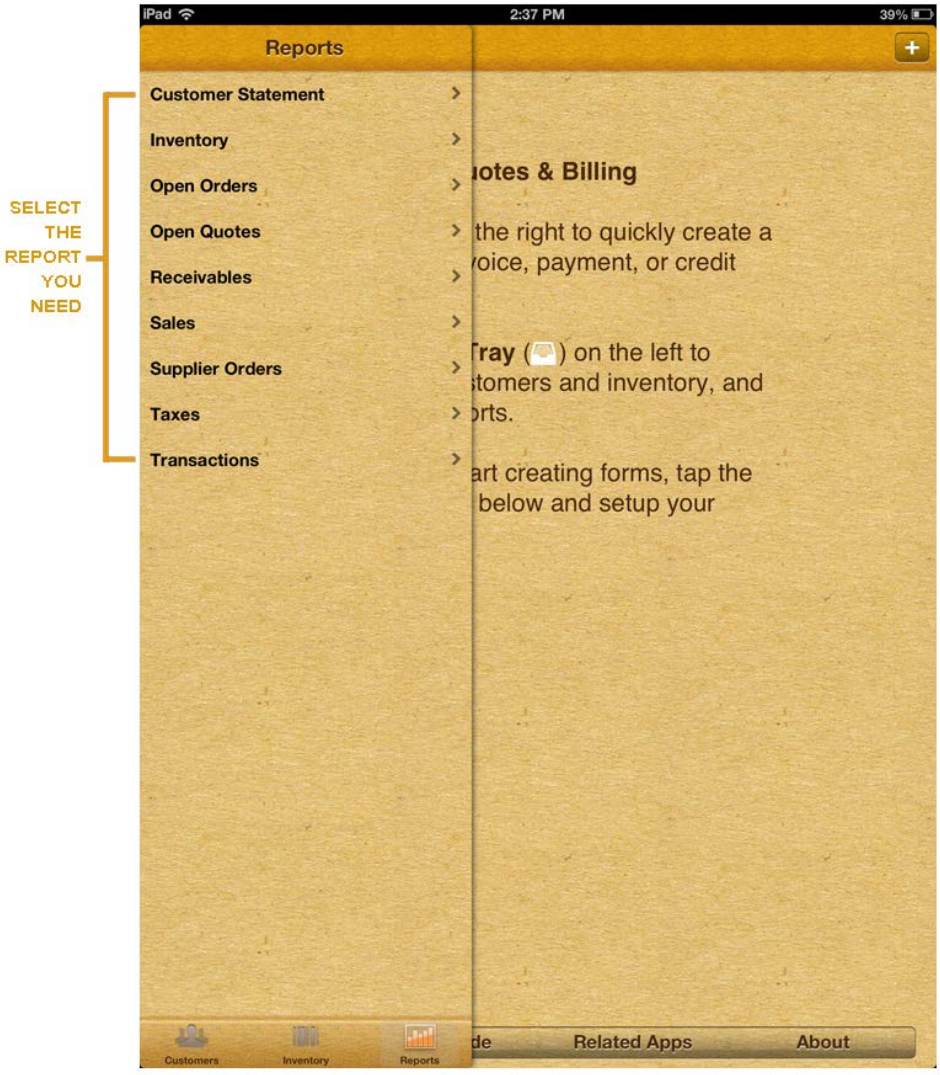


Once you enter the line items on the invoice, you have the opportunity to go into the line items of an invoice and insert the amount of the shipping and give a discount for the complete order.

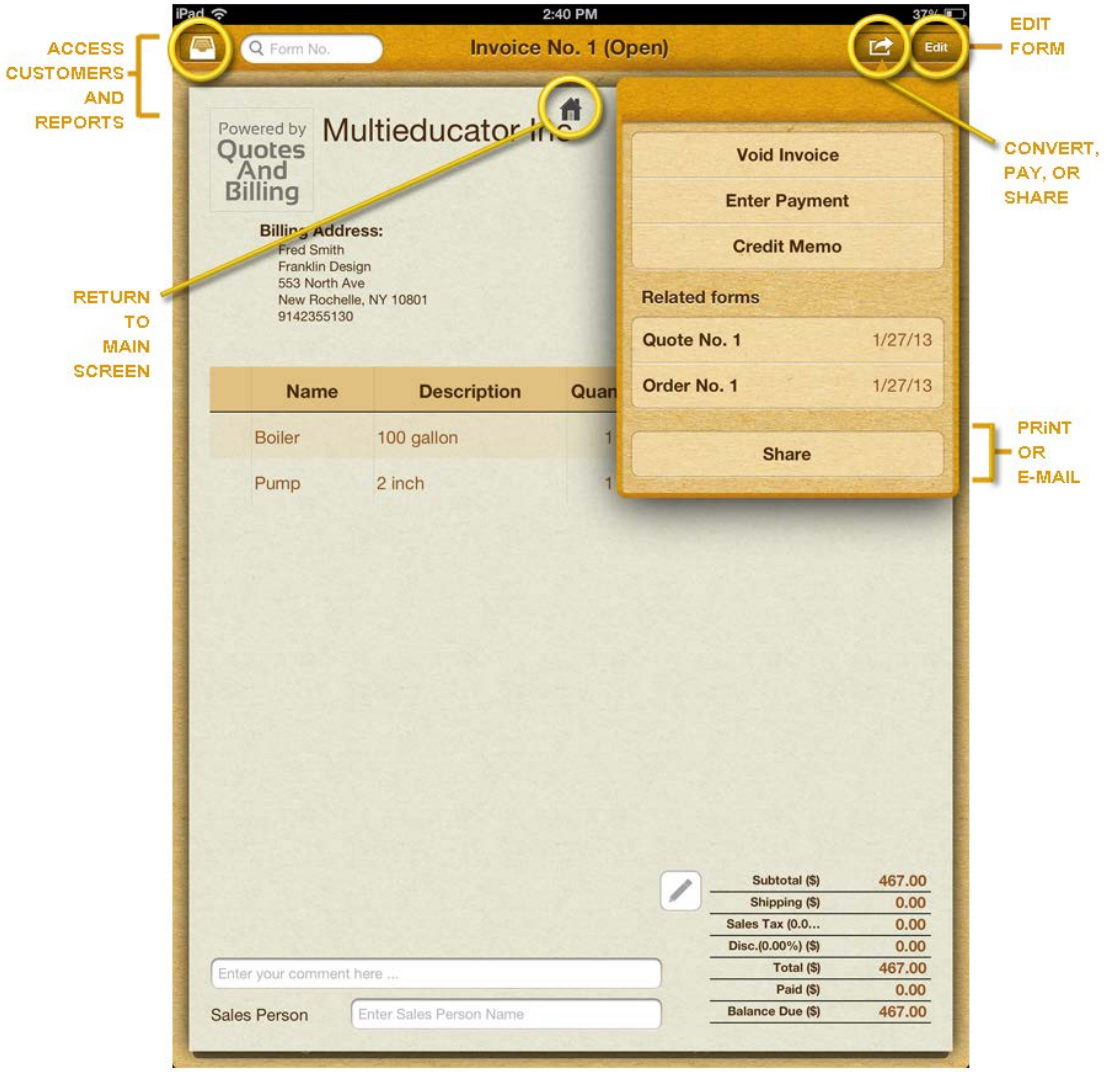
REPORTS

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.



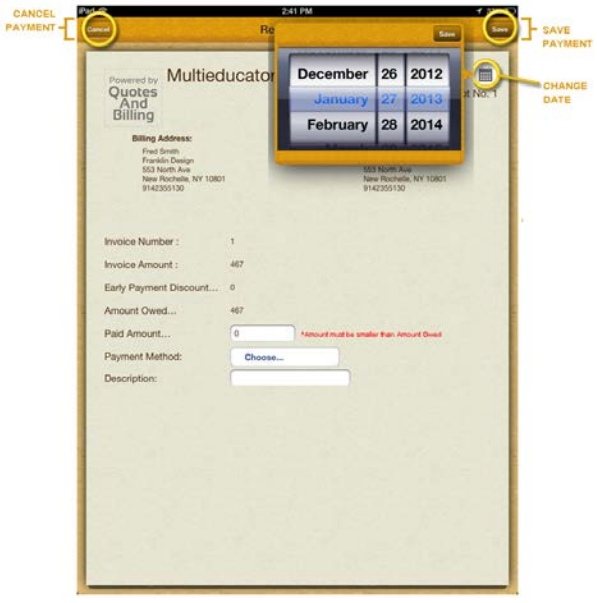
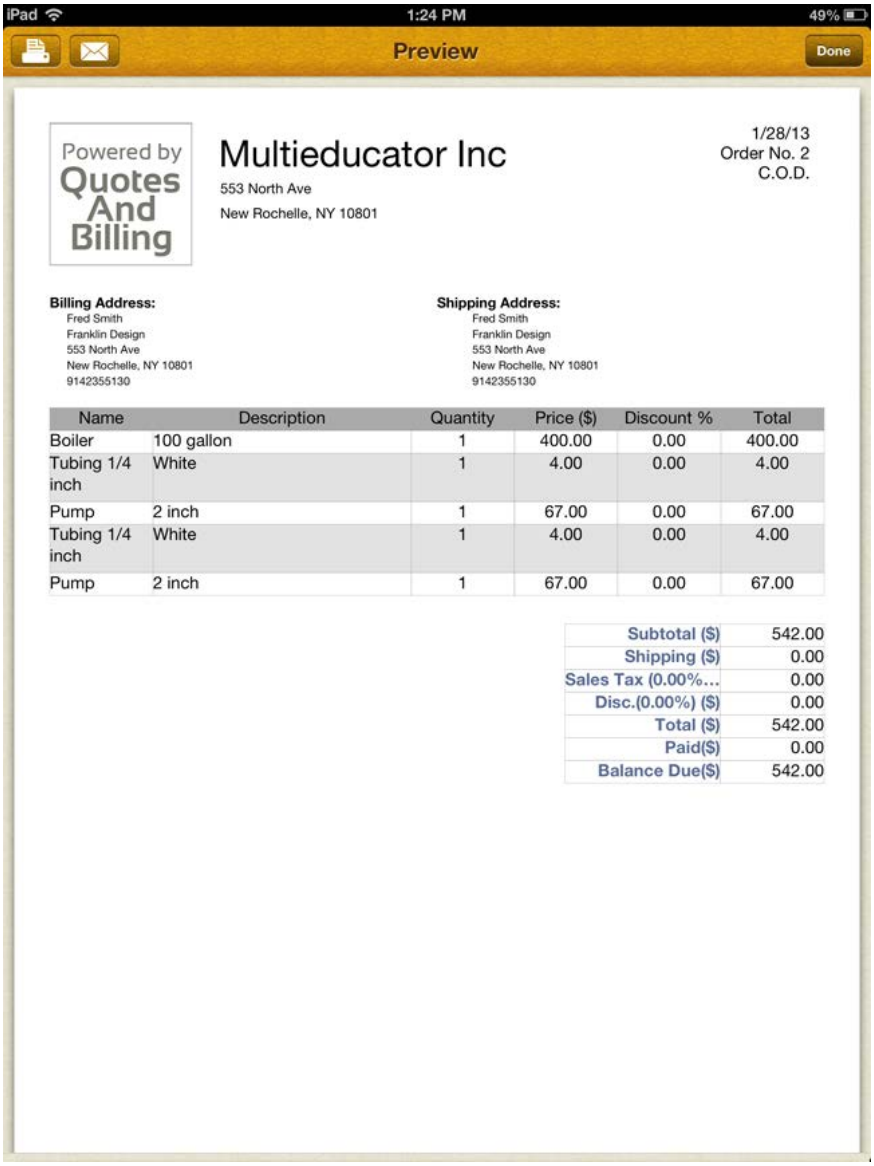
ACCESS CUSTOMERS AND REPORTS
iPad
2:39 PM
Form No.
CREATE A NEW FORM
Select Customer
CHOOSE A DIFFERENT CUSTOMER
Base this form on an existing one?
Open Quotes
Quote No. 1 1/27/13
CONVERT A QUOTE INTO AN ORDER
No, start with an empty form
Welcome to Quotes & Bi
Tap Add (+) on the right t
quote, order, invoice, payr
memo.
Use the Filing Tray ( ) on the left to access your customers and inventory, and to generate reports.
To be able to start creating forms, tap the Settings button below and setup your business info.
Settings
User Guide
Related Apps
About



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.
There you get to enter the amount received.
You also choose the **payment method** and **add a comment**.

CANCEL PAYMENT
iPad
2:41 PM
Cancel
Receipt No. 1
Save
SAVE PAYMENT
Powered by Quotes And Billing
Multieducator Inc
1/27/13
Receipt No. 1
CHANGE DATE
Billing Address:
Fred Smith
Franklin Design
553 North Ave
New Rochelle, NY 10801
9142355130
Shipping Address:
Fred Smith
Franklin Design
553 North Ave
New Rochelle, NY 10801
9142355130
Invoice Number : 1
Invoice Amount : 467
Early Payment Discount... 0
Amount Owed... 467
Paid Amount... 0
*Amount must be smaller than Amount Owed
Payment Method: Choose...
Description:


CANCEL PAYMENT
SAVE PAYMENT
CHANGE DATE
December 26 2012
January 27 2013
February 28 2014

SAMPLE INVOICE