



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

The screenshot shows the 'Settings' screen on an iPad. The status bar at the top indicates 'iPad', signal strength, '2:43 PM', and '37%' battery. The title bar says 'Settings' with a 'Done' button on the right. The main content area is titled 'Powered by Quotes And Billing' and 'Multieducator Inc'. The form contains the following fields and controls:

- Company Information:** Phone, Fax, eMail, Web Site, Address 1, Address 2, City, State, Zip, Country.
- Tax Info:** Type (Sales Tax), Rate (%) (0.00), Shipping Is Taxable (OFF).
- Next form numbers:** Quote (2), Order (2), Invoice (2), Credit Memo (1), Receipt (2).

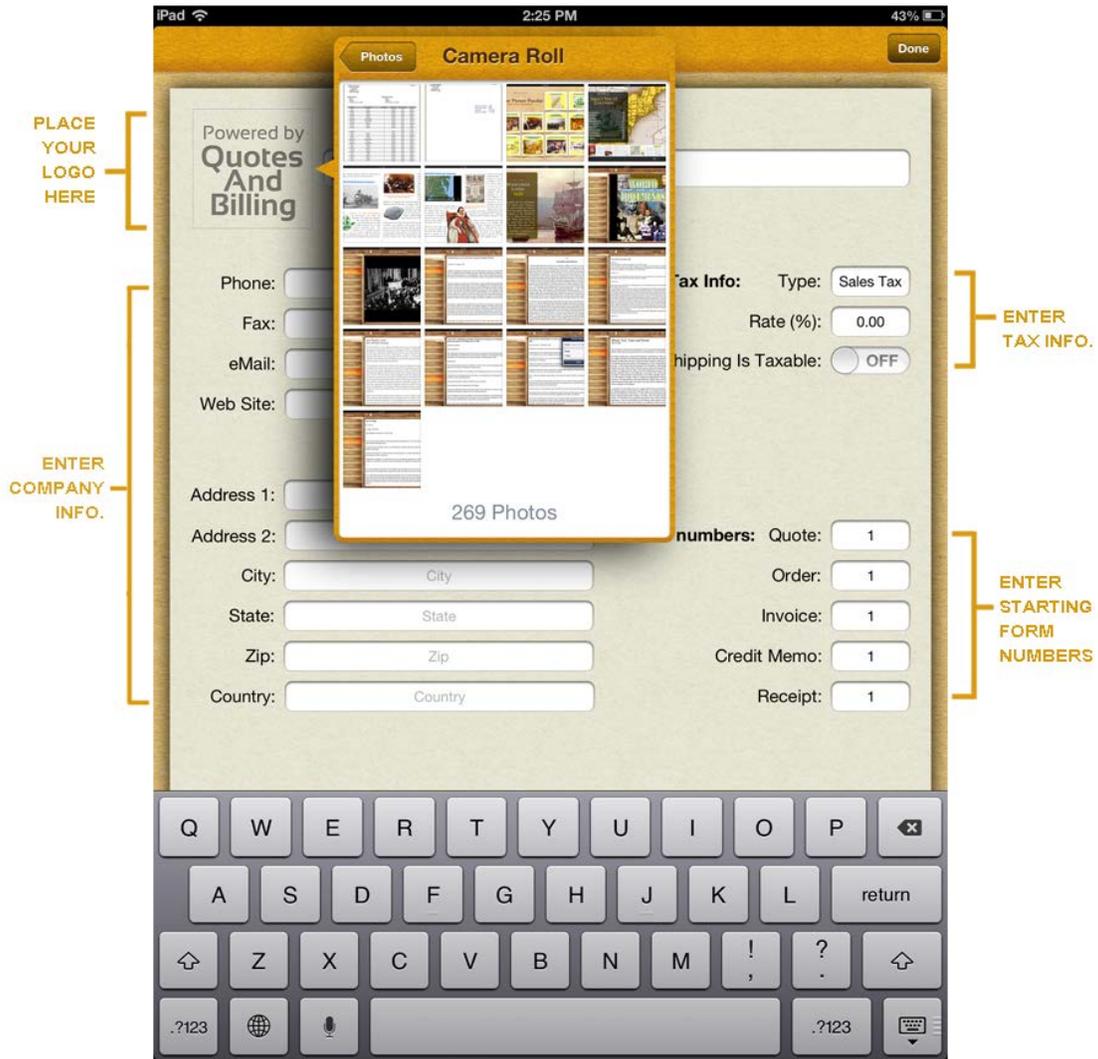
Annotations on the screen:

- A bracket on the left side of the form is labeled 'ENTER COMPANY INFO.' and encompasses the Phone, Fax, eMail, Web Site, Address 1, Address 2, City, State, Zip, and Country fields.
- A bracket on the right side of the form is labeled 'ENTER TAX INFO.' and encompasses the Tax Info section.
- A bracket on the right side of the form is labeled 'ENTER STARTING FORM NUMBERS' and encompasses the Next form numbers section.

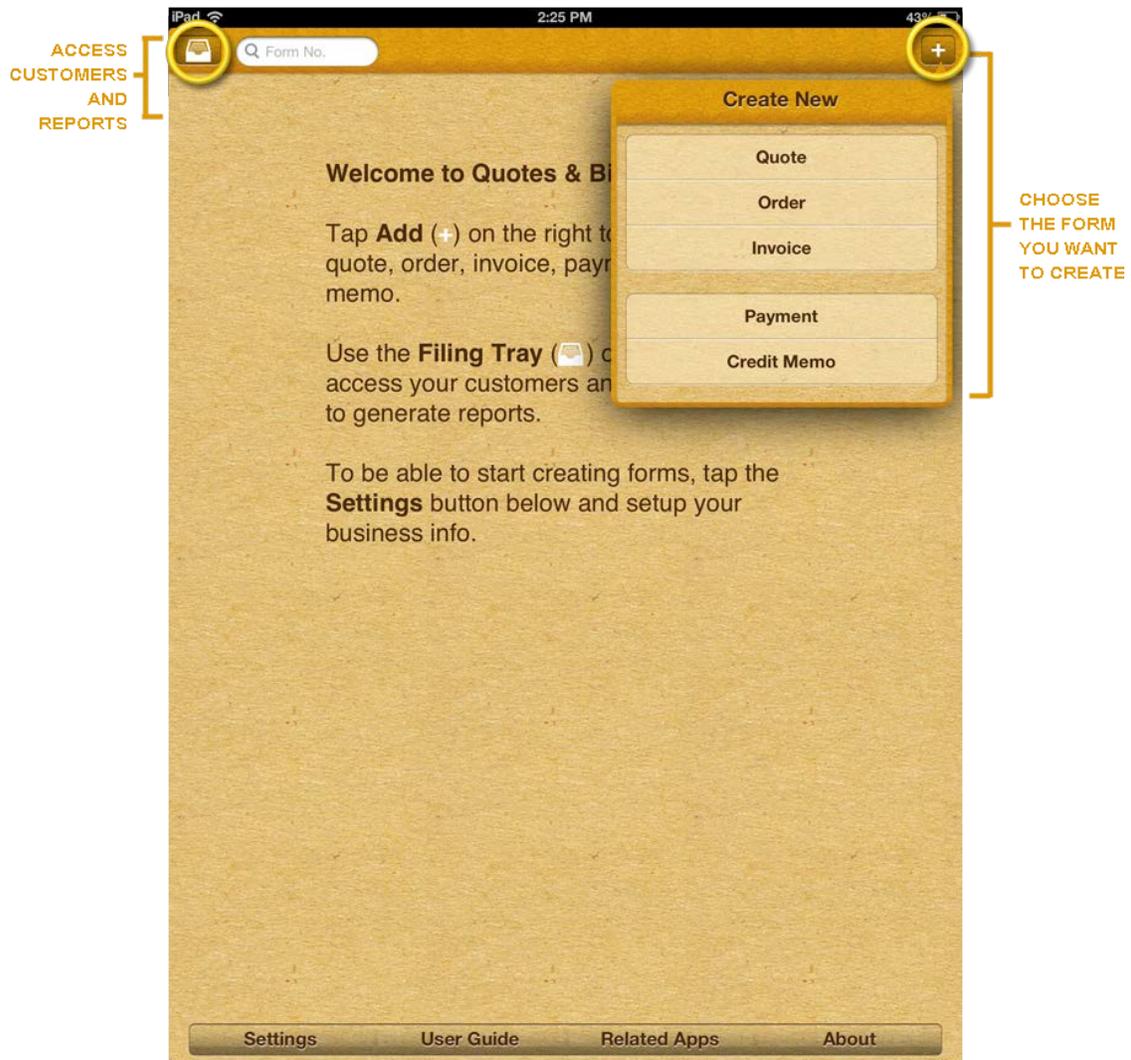
STEP 3: Enter your **TAX TYPE** (e.g. Sales Tax, V.A.T.) and enter the **TAX RATE**.
(NOTE: If there is tax on shipping, then switch the “**SHIPPING ON TAXABLE**” to “**YES**”).

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 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.

ACCESS CUSTOMERS AND REPORTS

ENTER CUSTOMER INFO.

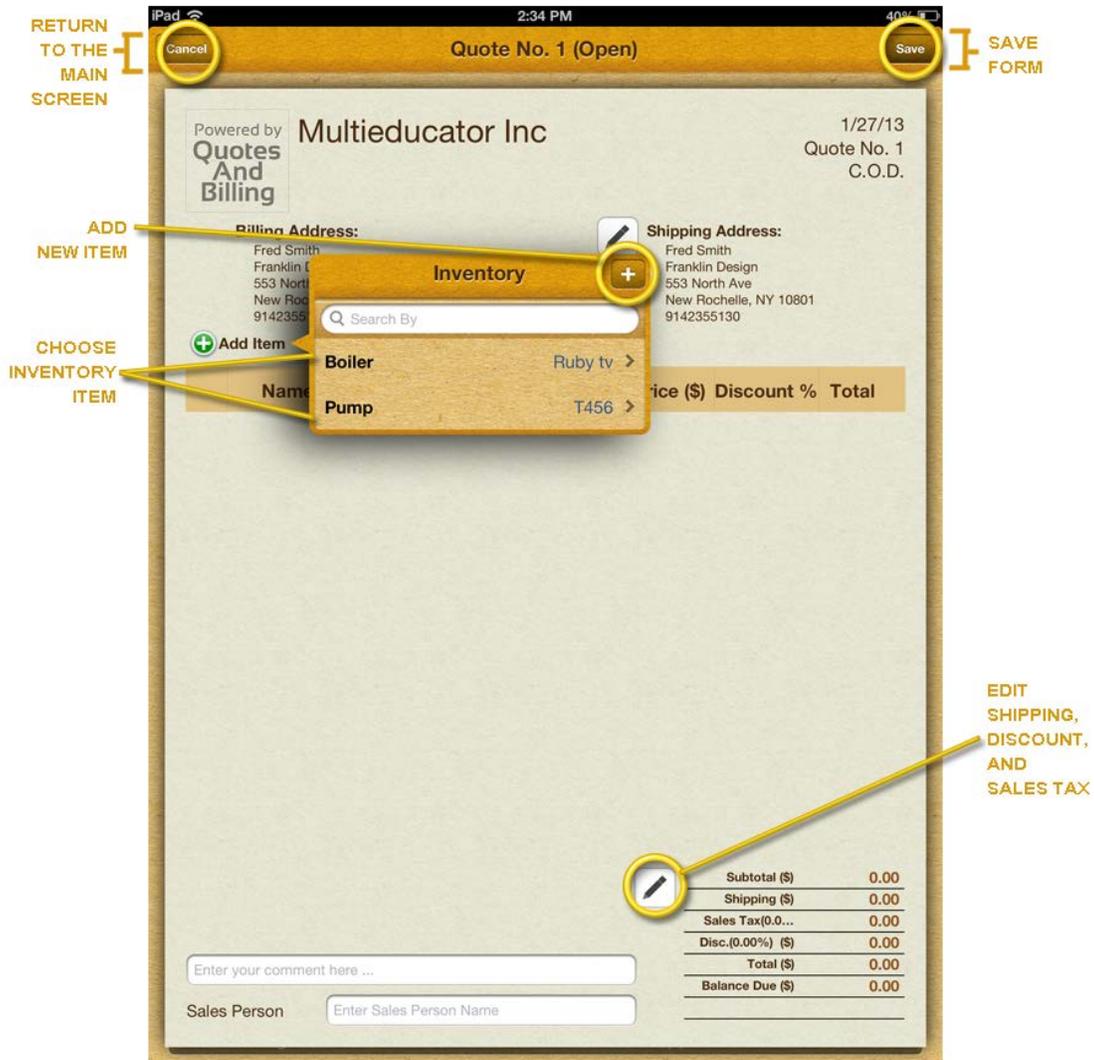
NOTE: ENTER MANDATORY FIELDS

Q **W** **E** **R** **T** **Y** **U** **I** **O** **P** **X**

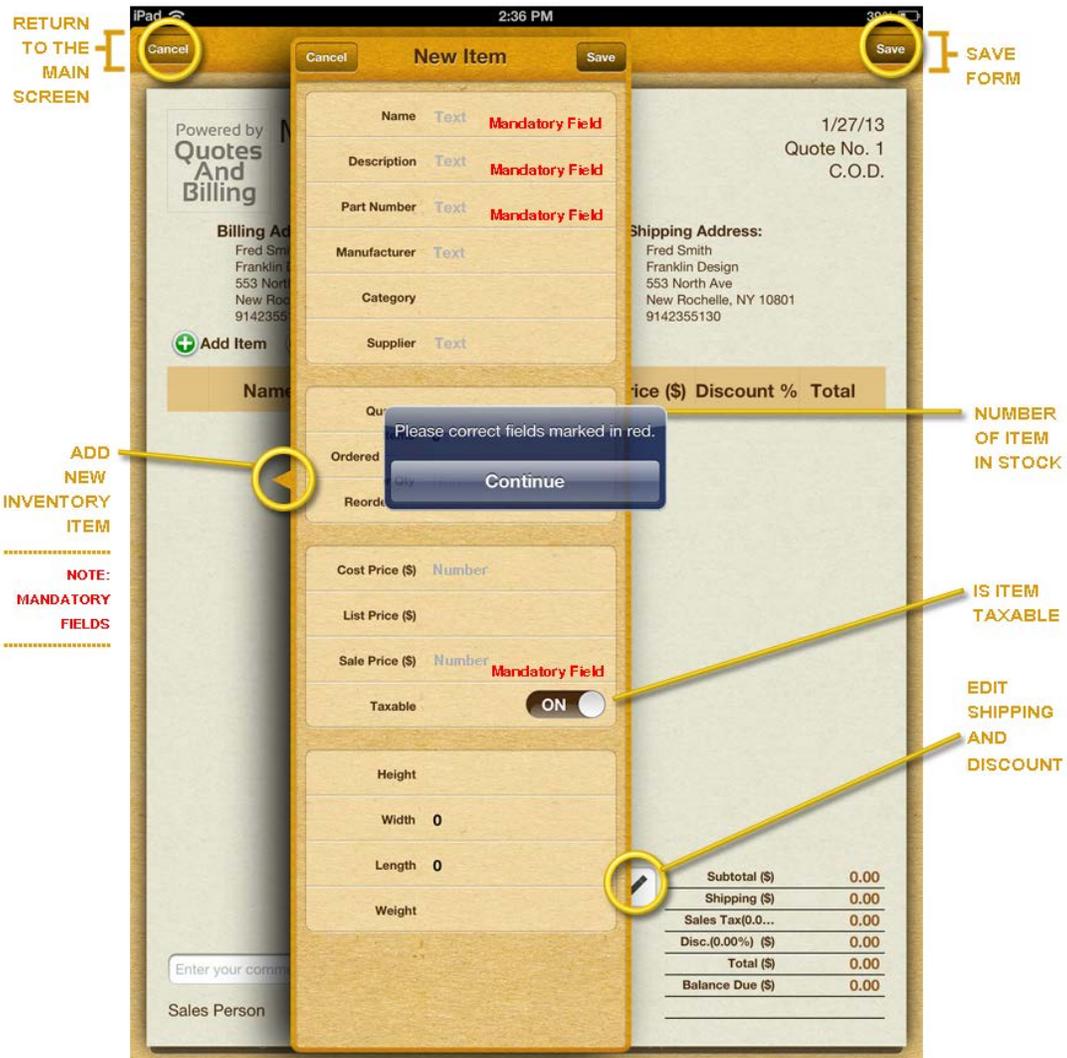
A **S** **D** **F** **G** **H** **J** **K** **L** **return**

↑ **Z** **X** **C** **V** **B** **N** **M** **!** **?** **↓**

.?123 **globe** **microphone** **.?123** **keyboard**



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.

RETURN TO THE MAIN SCREEN

Cancel

Quote No. 1 (Open)

Save

SAVE FORM

Powered by **Quotes And Billing** Multieducator Inc 1/27/13
Quote No. 1
C.O.D.

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

+ Add Item + Add Service Charge

Name	Description	Quantity	Price (\$)	Discount %	Total
- Tubing 1/4 i...	White	1	4.00	0.00	4.00
- Boiler	100 gallon	1	400.00	0.00	400.00

DELETE LINE ITEM

EDIT SHIPPING, AND DISCOUNT, INFO.

SHIPPING, AND DISCOUNT, INFO.

Done

Shipping (\$) 5.00

% Discount 0

Enter your comment here ...

Sales Person Enter Sales Person Name

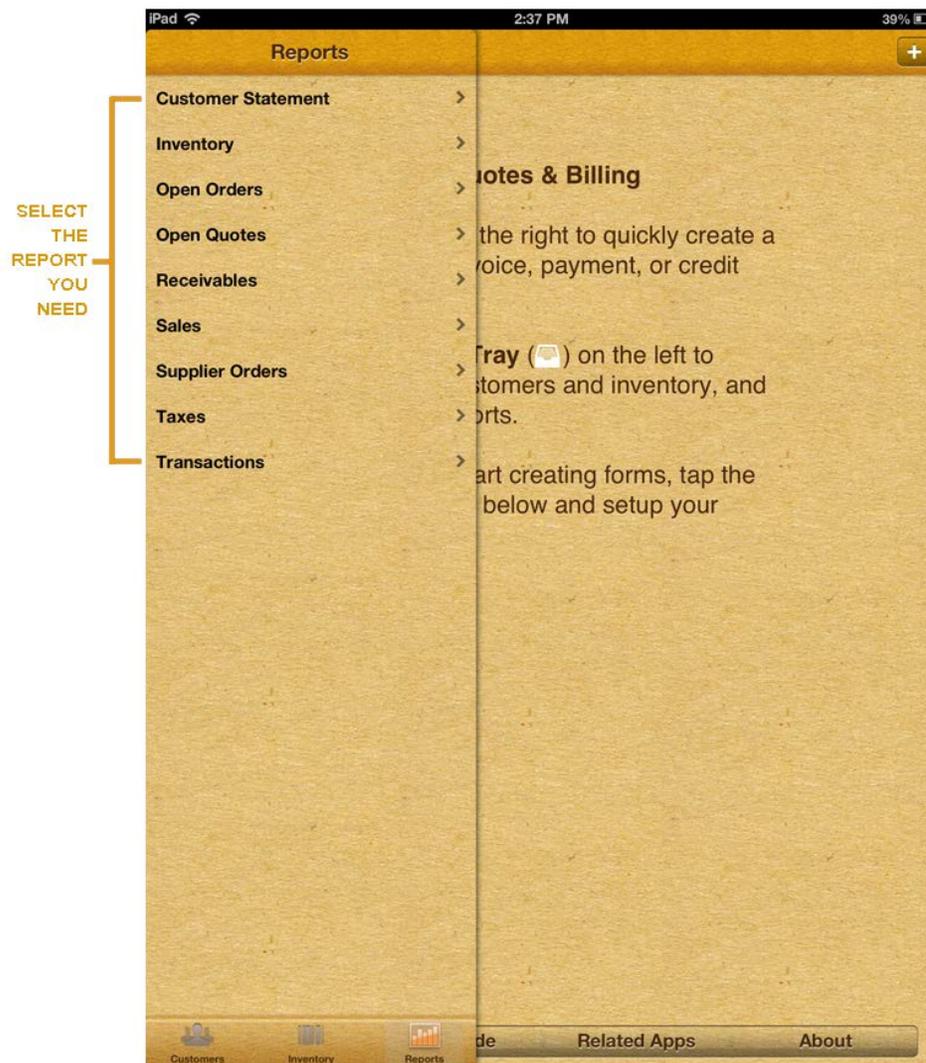
Subtotal (\$)	404.00
Shipping (\$)	5.00
Sales Tax(0.0...	0.00
Disc.(0.00%) (\$)	0.00
Total (\$)	409.00
Balance Due (\$)	409.00

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.

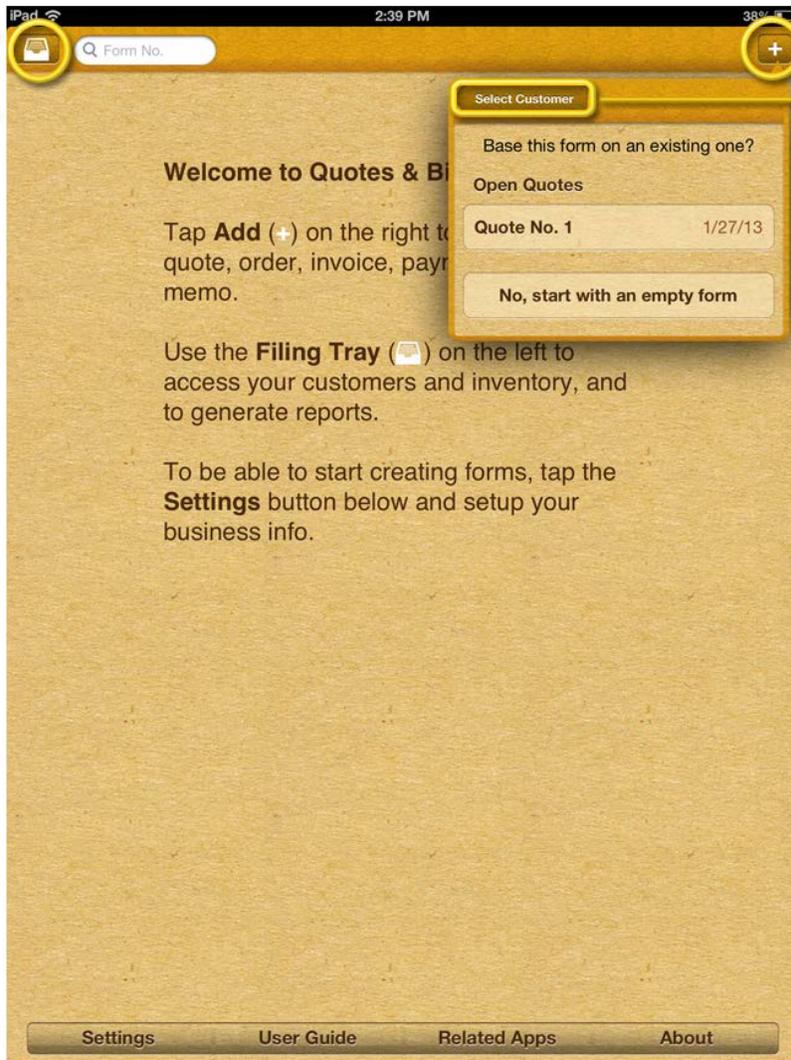
REPORTS

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.



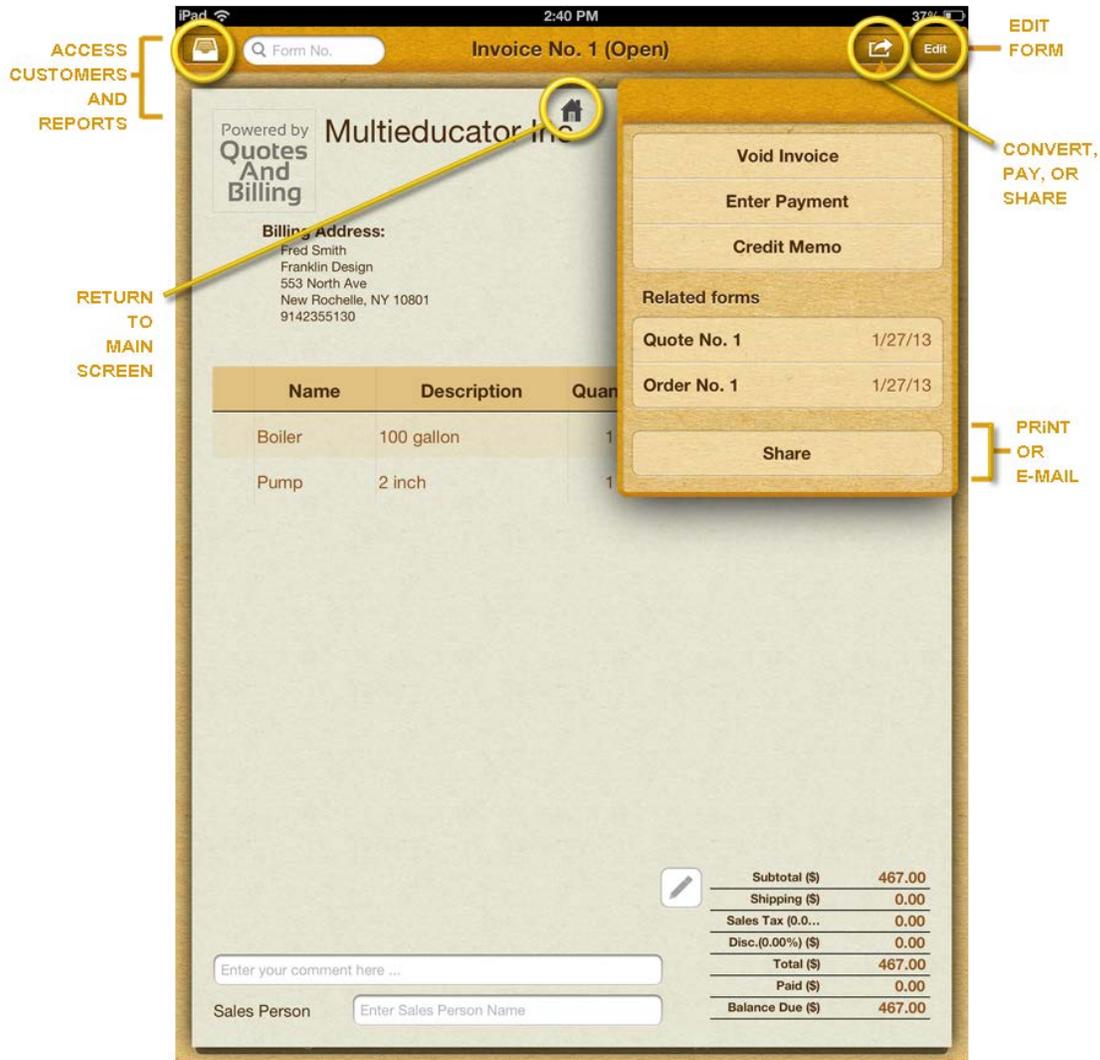
ACCESS
CUSTOMERS
AND
REPORTS



CREATE
A NEW
FORM

CHOOSE
A DIFFERENT
CUSTOMER

CONVERT
A QUOTE
INTO
AN ORDER



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 Cancel 2:41 PM 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... *Amount must be smaller than Amount Owed
 Payment Method:
 Description:

CANCEL PAYMENT Cancel 2:41 PM 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... *Amount must be smaller than Amount Owed
 Payment Method:
 Description:

December 26 2012
 January 27 2013
 February 28 2014

SAMPLE INVOICE

iPad 1:24 PM 49%

Print Email Preview Done

Powered by
**Quotes
And
Billing**

Multieducator Inc

553 North Ave
New Rochelle, NY 10801

1/28/13
Order No. 2
C.O.D.

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

Name	Description	Quantity	Price (\$)	Discount %	Total
Boiler	100 gallon	1	400.00	0.00	400.00
Tubing 1/4 inch	White	1	4.00	0.00	4.00
Pump	2 inch	1	67.00	0.00	67.00
Tubing 1/4 inch	White	1	4.00	0.00	4.00
Pump	2 inch	1	67.00	0.00	67.00

Subtotal (\$)	542.00
Shipping (\$)	0.00
Sales Tax (0.00%...)	0.00
Disc.(0.00%) (\$)	0.00
Total (\$)	542.00
Paid(\$)	0.00
Balance Due(\$)	542.00