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# Welcome to M-Tech Digital's Web Invoice

## Manual and Documentation of Important Features

### What is Web Invoice?

**Web Invoice** is a Web Based **Invoicing**, **Appointment Scheduling** and **Automated Reminders**, **help desk** solution designed for your small or freelance service business.

Web Invoice handles customers, creates invoices, estimates, service requests, calculates parts, labor and hours spent, emails, calls, sends SMS to your customers and a whole lot more. It handles your business in an efficient manner, enabling you to keep track of where your business is headed and bill your customers on a timely basis saving time for you to handle your business.

It also provides your customers login access to check the work status of an invoice, make a payment or to create a service request ticket for a help desk system. While logged in, users can upload their files into their personal file storage area and make payments on outstanding open invoices individually or all at once.

Web Invoice supports monthly and yearly recurring billing, automatically creating invoices and emailing them to your customers automatically. Monthly statements and invoices can be fully automated within a Linux platform using Cron scheduler.

Web Invoice also allows you to schedule appointments for your customers and gives you the option to send them a Phone/SMS/Email reminder before the time of the appointment avoiding no shows.

Because Web Invoice is "Web Based", you can either subscribe to the online cloud subscription service or install on your computer or hosted server and access your account from anywhere using virtually any kind of computer, Tablet or smart phone.

*Web Invoice is also a **Point of Sale (POS)** system, a computerized cash register, and can handle up to 253 cash registers. The POS system supports cash drawer control, UPC scanners, receipt printers, X and Z reports, multi-user support with periods and credit swiping with Authorize.net. Gateway.*

*Web Invoice also includes the **Shopping Cart** feature, allowing end users to log in and purchase items through Web Invoice and can be integrated into your current website.*

## Logging into Web Invoice Online Cloud Subscription

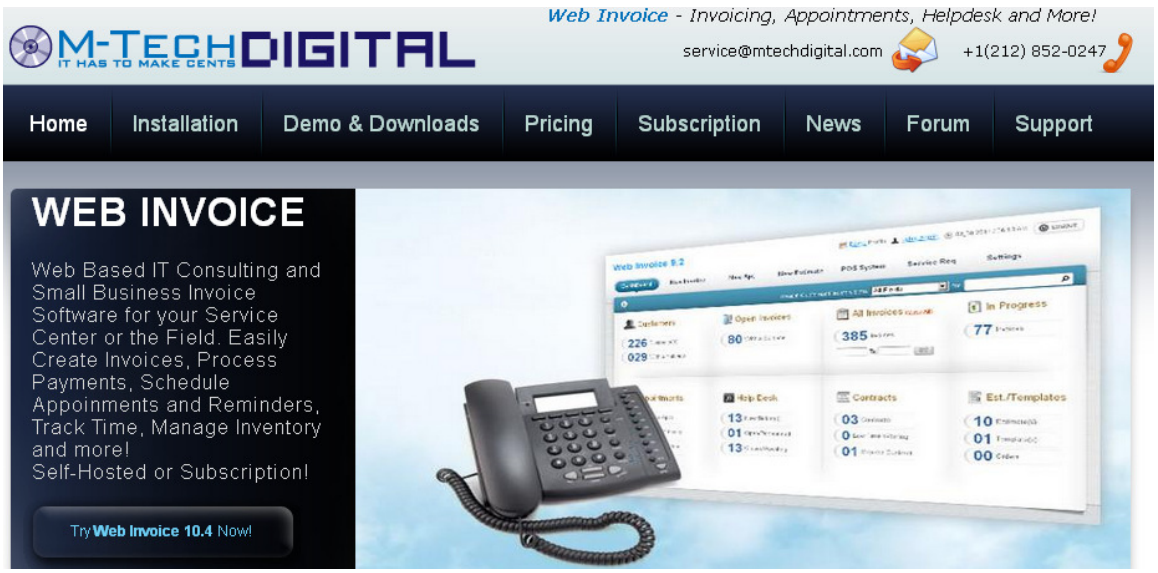
After you've registered for the subscription online Edition, the administrator user account will be created with the following credentials:

**Username: admin**

**Password: 1234**

- To Login to the System

1) Go to [www.mtechdigital.com/](www.mtechdigital.com/) and click on Subscription, then click on login to your account.



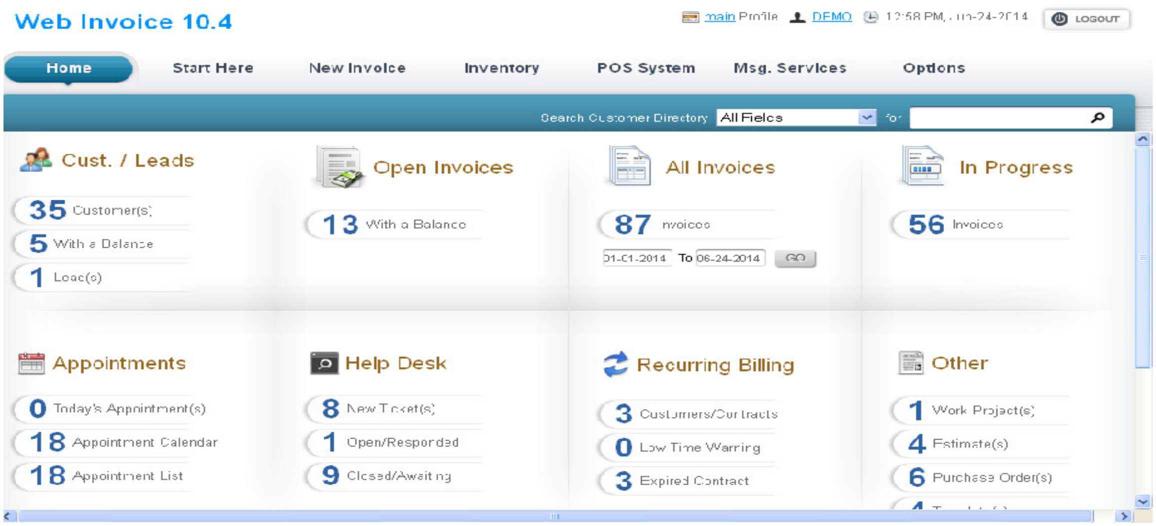

*Home Page*

2) Type your Account ID, **Click Login to account**. You'll now enter your Login page of your personal account.

*Never delete the user account. The only person with access to this account and who can create an additional profile is the admin. Once you create additional accounts in the profile nobody has access to the account.*

# Main Page

When you log in to the system you will be automatically taken to the **Main Page. From the Main Page** you have access to a variety of features needed for managing invoice information. The vertical bar on the left side of the screen contains the 8 sections that allow you to navigate the site. More features are located in sections on the grid on the bottom side of the page and give you access to other features found in Web Invoice.




*Main Page*

## Upper Menu:

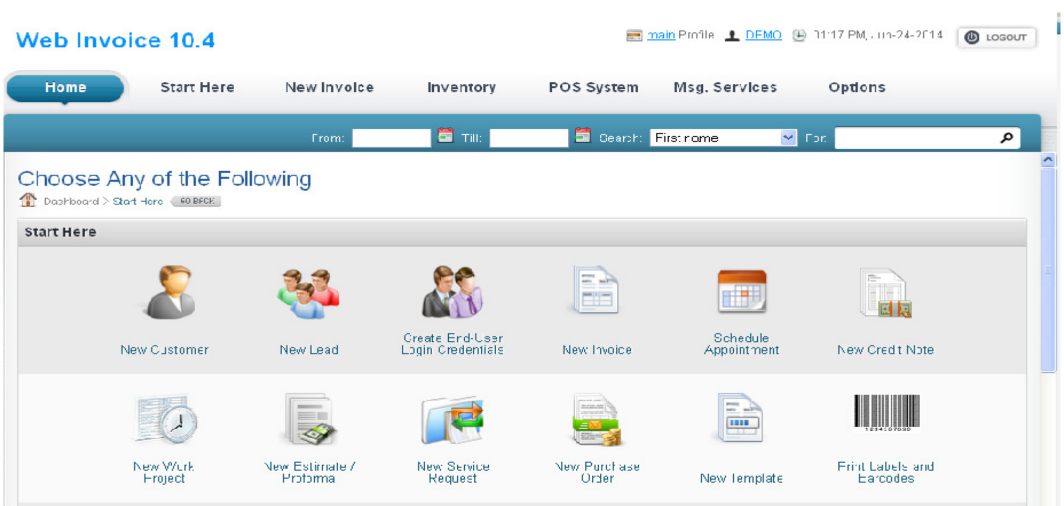
Once you can login you can access the list of features in located in the top row of the Main Page. The features are **Main**, **Start Here**, **New Invoice**, **Inventory**, **POS System**, **Message Service**, **Options**

### Home

Clicking on **Main** brings you back to the **Main Page**.

### Start Here

### This is where you can choose all major functions of Web Invoice. Including creating a new Invoice.

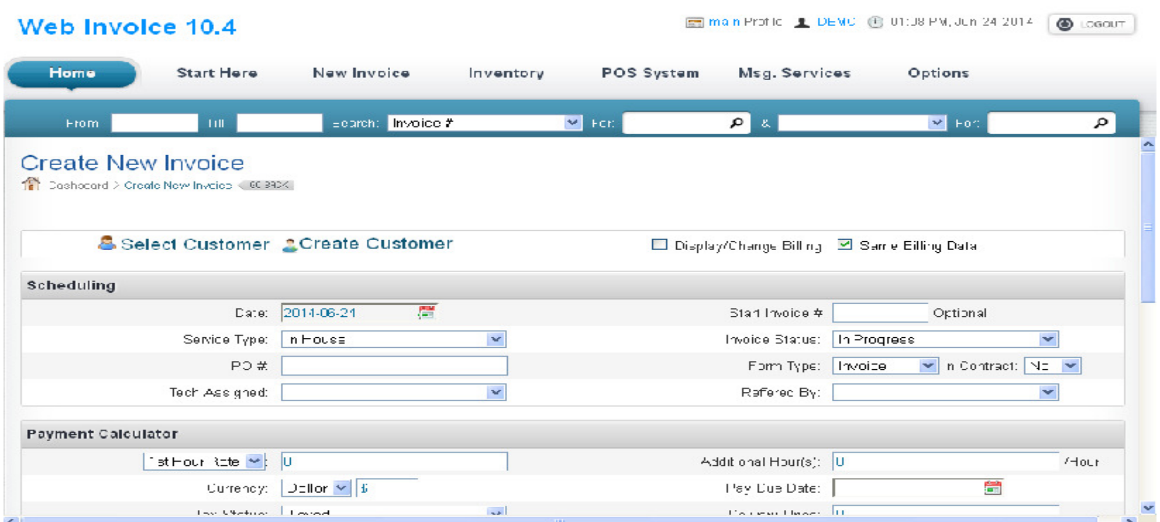


## New Invoice

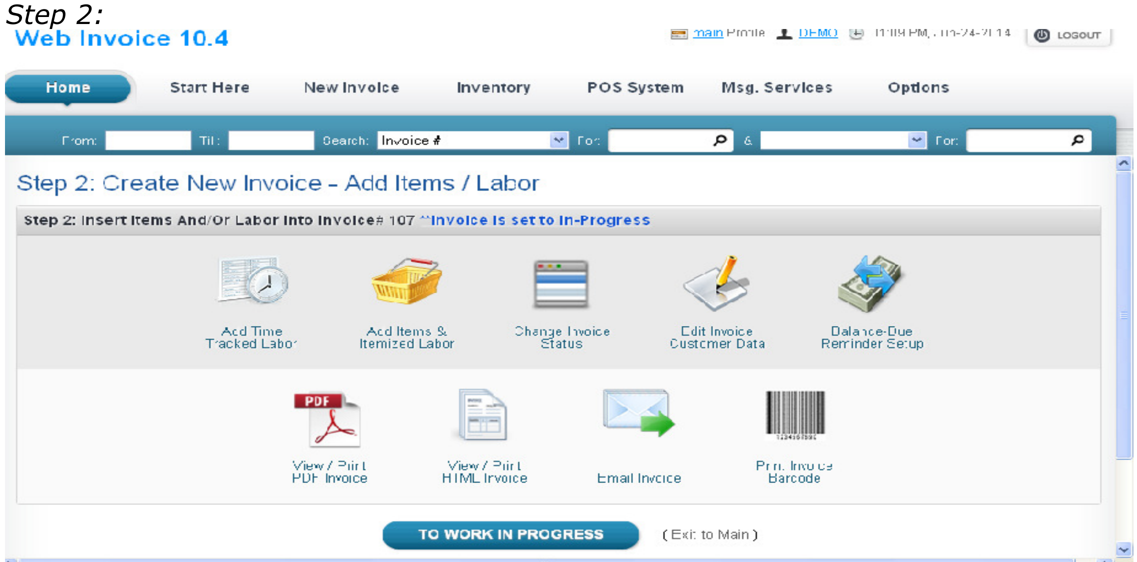
The **New Invoice** Button is a Main and popular feature, so it's also been placed on the top menu. It allows you to create a new invoice without pulling in any previous invoice or customer data. It will only fill out default data such as tax rates, currency, current date, service call or in house selection, invoice, estimate and tax status.

Creating an invoice using this feature automatically creates a new customer if you Click on "Create customer" instead of "Select Customer". Once you fill out the customer data form, and the rest of the info, a New Invoice it'll be create as well as a new customer in one step. Creating an invoice from a customer's data will be covered shortly.

- To Create a New Invoice, (2 Steps)
  - Step 1: Fill out the fields and press the **Enter Above Data** button at the bottom of the page. The **Create a New Invoice Page** is displayed.

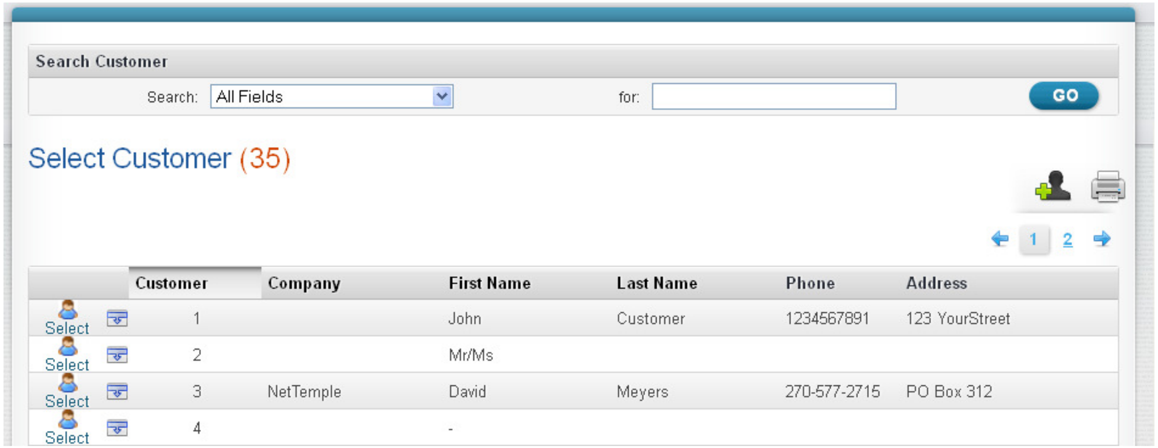



*Step 2:*



## Selecting a Customer instead of creating a new one

The **Select Customer** icon displays a list of customers allowing you to select and view a customer's information.




*Select Customer Page*

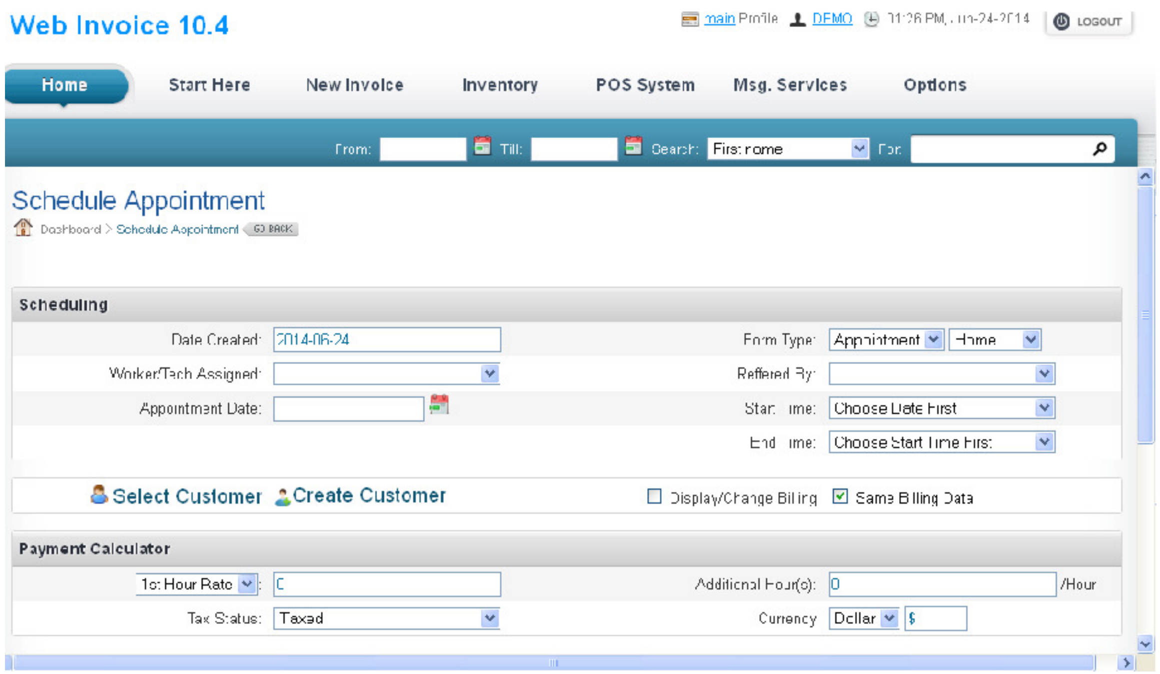
**You can also choose to create a new Customer at this point by clicking on the top right icon near the printer icon, if you can't find the customer on the List.**

## New Appointment

The **New Appointment**  feature allows you to create a new appointment for a new customer or an existing customer, similar to creating a new Invoice.

To Create a New Appointment

- Fill out the fields and press the **Click Here to Schedule** [Click Here to Schedule] button at the bottom of the page. An appointment is created.




*Schedule a New Appointment Page*

## New Estimate

The **New Estimate** feature allows you to create a new estimate.

*Create New Estimate Page*

### To Create a New Estimate

- Fill out the fields and press the **Click Here to Enter Data** button at the bottom of the page. A new estimate is created.

## POS Sale

Same as "New Invoice" except it will not ask to insert any customer data, and will automatically call that customer "POS Customer."

The **POS** feature allows you to create a new invoice without pulling in any previous invoice or customer data. It will only fill out default data such as tax rates, currency, current date, service call or in house selection, invoice, estimate and tax status. This section should probably mention only the default data pulled in so the customer knows what to expect. Creating an invoice using this feature automatically creates a new customer and displaying that customer's data in one step.

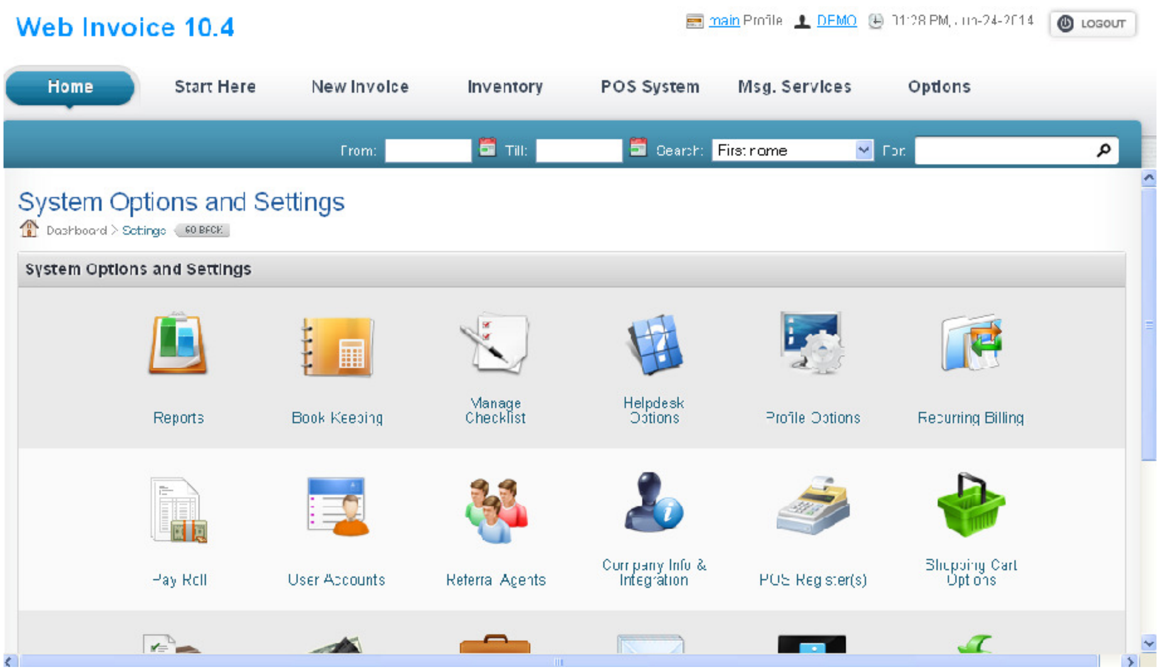
## Service Request

The **Service Request** feature allows the administrator or technician to create a new service request allowing your customer to ask questions and open up service tickets.

### To Create a Service Request, go to "Start Here" and Choose New Service Request.

## Options

The **Options** feature gives you access to the **System Options and Utilities** page where the bulk of all settings and your information is located. Some of these options and utilities are accessible from other pages, such as the **Company Info**, **User Account** and **Helpdesk Options** settings and a whole lot more. The Options feature will be discussed in greater detail in the next section.




*System Options and Utilities Page*

## Logout

The **Logout** feature logs you out of **Web Invoice**.

You must log out before opening another instance of Web Invoice. Only one session can be opened at a time per computer due to conflicting data passing through cookies.

# Options

As discussed in the previous section, you can access additional features from the **Options** feature.

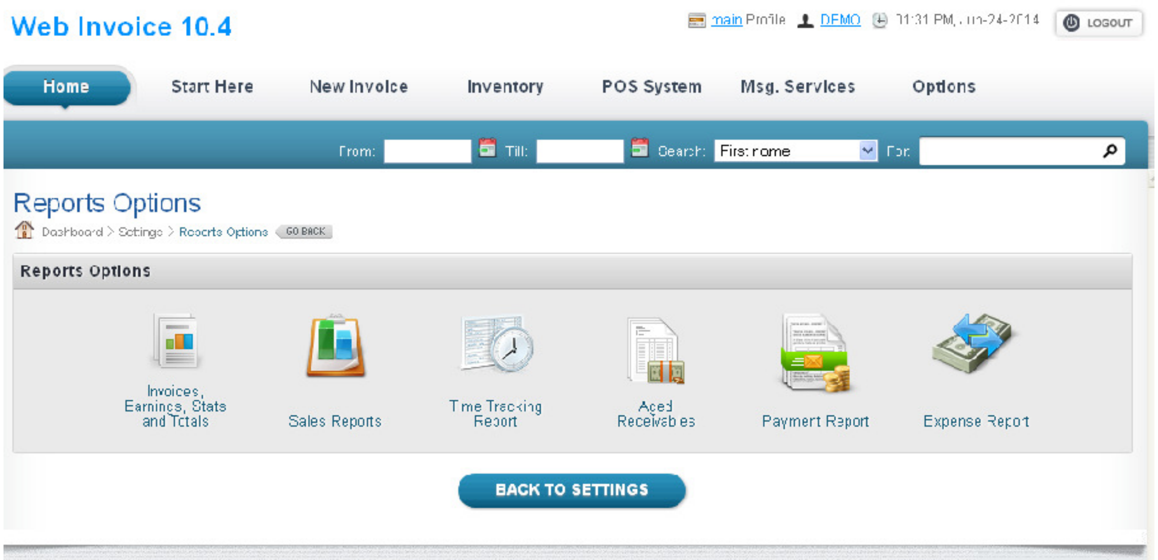
## Reports

The **Reports** feature allows you to search through **Invoice Stats** or **Sales Reports** and search for invoices matching your desired credentials.

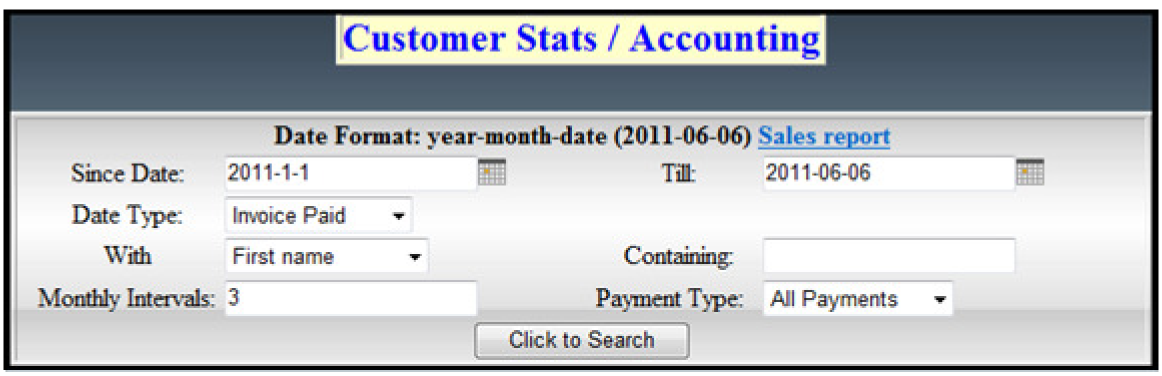
## Viewing Invoice Stats

- To Search Through Invoice Stats

1) In the **Options Page** click **Reports**. A screen is displayed showing your reports options.




2) Click on the **Invoice Stats** icon. The **Invoice Stats Screen** is displayed.




*Invoice Stats Screen*

3) Click on the **Click to Search** button. A screen is displayed with your desired credentials.

| Month / Year | New Customers |
|---|---|
| March / 2011 | 0 |
| April / 2011 | 2 |
| May / 2011 | 0 |
| Past 3 Month Average | 0.7 |

## Viewing Sales Reports

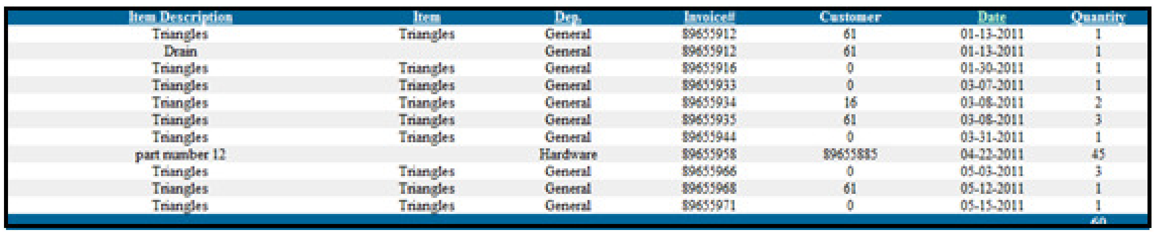
- To View Sales Reports

1) In the Options Page click **Report**. A screen is displayed showing your reports options as in **Step 1** of **Viewing Invoice Stats**.

2) Click on the **Sales Reports** icon. The **Sales Report Screen** is displayed.


*Sales Report Screen*

3) Click on the **Click to Search** button. A screen is displayed with your desired credentials.



| Item Description | Item | Dep. | Invoice# | Customer | Date | Quantity |
|---|---|---|---|---|---|---|
| Triangles | Triangles | General | 89655912 | 61 | 01-13-2011 | 1 |
| Drain | | General | 89655912 | 61 | 01-13-2011 | 1 |
| Triangles | Triangles | General | 89655916 | 0 | 01-30-2011 | 1 |
| Triangles | Triangles | General | 89655933 | 0 | 03-07-2011 | 1 |
| Triangles | Triangles | General | 89655934 | 16 | 03-08-2011 | 2 |
| Triangles | Triangles | General | 89655935 | 61 | 03-08-2011 | 3 |
| Triangles | Triangles | General | 89655944 | 0 | 03-31-2011 | 1 |
| part number 12 | | Hardware | 89655958 | 89655885 | 04-22-2011 | 45 |
| Triangles | Triangles | General | 89655966 | 0 | 05-03-2011 | 3 |
| Triangles | Triangles | General | 89655968 | 61 | 05-12-2011 | 1 |
| Triangles | Triangles | General | 89655971 | 0 | 05-15-2011 | 1 |

# Book Keeping

# Payroll

# Referral Agents

The **Referral Agents** feature you to identify an **agent**, or a person who referred a customer to you, in order to pay them for their service. A payment is usually comprised of a percentage of the total invoice and you have the option to have their payment displayed in the **Payroll** feature page. This feature also allows you to add, remove and edit referral agents.

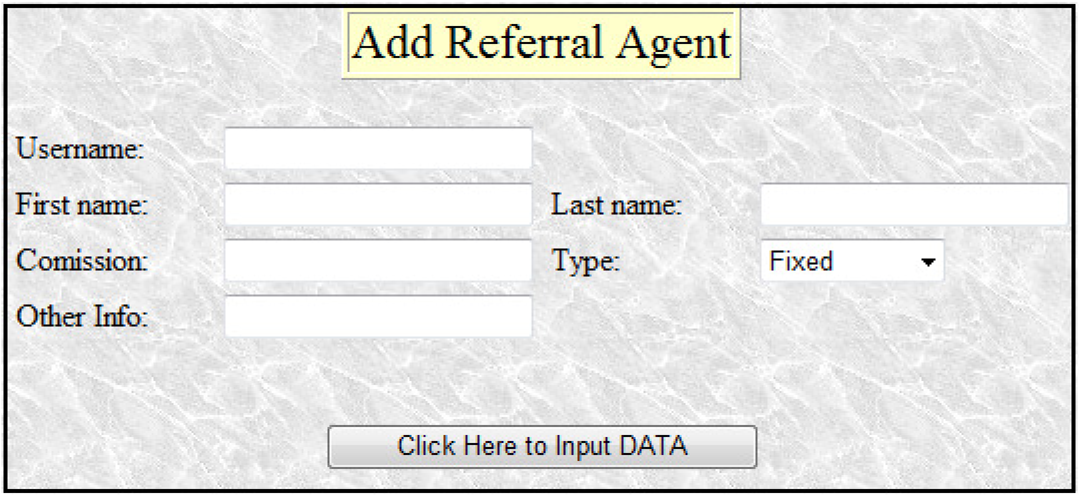

| Option | Option | ID | User Name | First Name | Last Name | Comission | Other |
|---|---|---|---|---|---|---|---|
| Remove | Edit | 2 | Rome | John | Rome | 20 % | test |
| Remove | Edit | 3 | | | | 0 % | |

*Referral Agents Page*

## Adding a Referral Agent

To Add a Referral Agent

1) Click on the **Add Referral Agent** button at the top right corner of the page. The **Add Referral Agent Page** is displayed.




*Add Referral Agent Page*

2) Fill out the fields and click on the **Click Here to Input DATA** button. A referral agent has been added.

## Removing

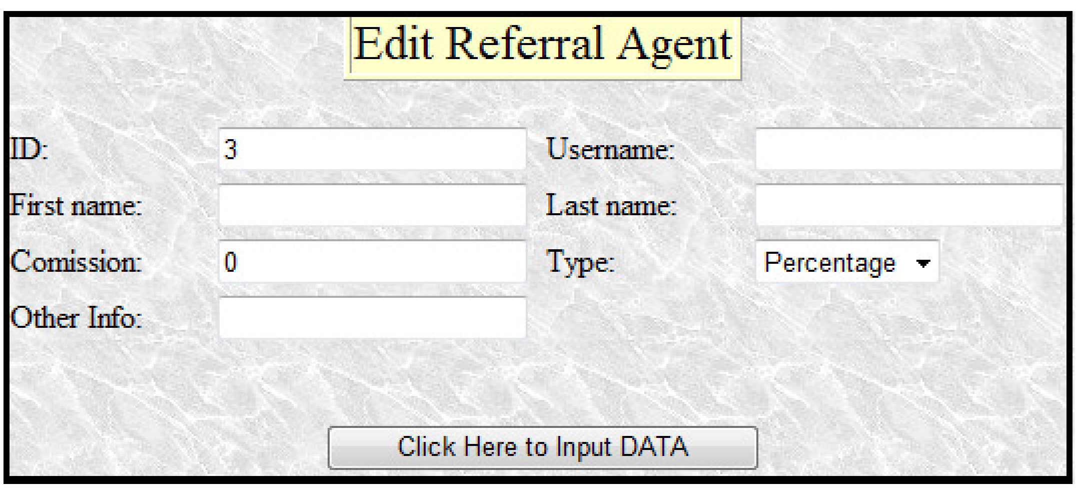
### To Remove a Referral Agent

- Click on the **Remove** link on the left edge of the page. The referral agent is removed.

## Editing a Referral Agent

### To Edit a Referral Agent

1) Click on the Edit link to the right of the **Remove** link. The Edit Agent Page is displayed.




*Edit Referral Agent Page*

2) Fill out the fields and click on the **Click Here to Input DATA** button. A referral agent has been edited.

Backup restore : allows you to backup the system and restore it

Customer directory is old, and is now only listed on the main page where it says view directory on the top left where it says customers.

Referral agents allows you to track someone who referred a customer to you so you can give them some type of payment

Profile Options:- allows you to delete a profile, create a new one, select which one you want to use while already logged in

Contracts: this is the area where you can add a contract for recurring billing and associate it with a template

Discount Presets: allows you to give a discount for an invoice and preset it to a certain name, which can then be selected by a drop down while editing an invoice

Users / Techs: this is the user accounts section to add or delete user account for admins or workers

Edit My Info: allows you to edit the company information and payment options and email account setup options for outgoing and incoming email setup

General Tax Rate: allows you to select the tax rate which will be pulled into every customer when creating a new customer and then will be pulled into an invoice

Change Password: allows you to change your system password

Manage Inventory: allows you to manage inventory

Adding, Subtracting or Editing and Inventory Item: pretty much what it says

Manage Service: allows you to manage a preset service similar to a preset discount, this can then be select when creating an invoice, instead of typing a service and inserting your own price or guessing for a price

Manage Checklist: this allows you to manage a checklist of things that need to get complete for every invoice which can automatically me inserted when creating a new invoice. You’d then have to check off all items to complete an invoice.

Manage Departments: allows you to manage departments for types of items. You can create or delete departments and set a certain tax rate for each department

Mass Email All Customers: allows you to email all customers at once with an email message either in html code or plain text

Mass Email Balance Due: this allows you to have all invoices emailed to all customers at once that have a balance due

License Information: shows what kind of license is installed into your version web invoice

Payroll: allows you to track how much you owe your workers for the job they’ve done for you/

## Profile Options

## Recurring Billing

## Discount Presets

## User Accounts

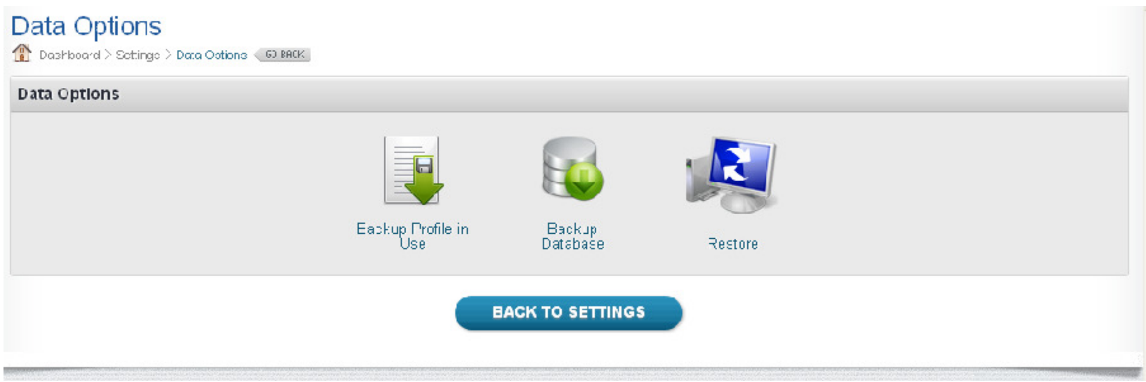
## Help Desk Options

## My Info & Integration

## POS Options

## Backup/Restore

The **Backup/Restore** feature allows you to make a backup of the profile in use, the whole database and to restore the database.




You can also make backups on your own using **PHPMYADMIN** or any other backup method.

### Making a Backup of a Profile in Use

- To Make a Backup of a Profile in Use

1) Click on the Backup Profile in Use icon. A window is displayed with the option to **Open**, **Save** or **Cancel**.

I couldn’t open it from my computer so I don't have a screenshot.

2)

### Making a Backup of the Database

- To Make a Backup of the Database

1) Click on the **Backup Profile of Database** icon. A window is displayed with the option to **Open**, **Save** or **Cancel**.

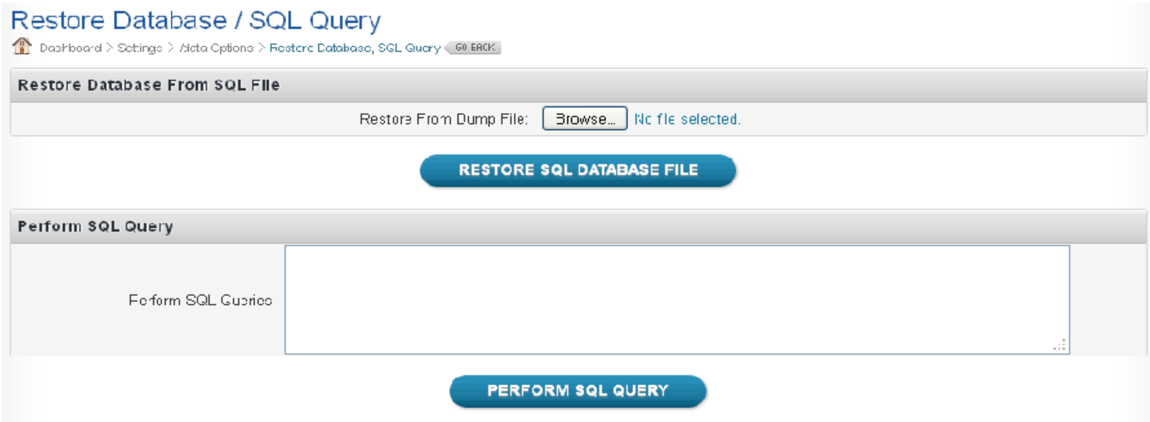
I couldn’t open it from my computer so I don't have a screenshot.

2)

### Restoring the Database

### To Restore the Database

- Click on the Restore Database icon. The Restore Database Page is displayed.




**Option 1**

- Click **Browse** and attach a file from your computer and click on the **Restore Database** button. The file is restored.

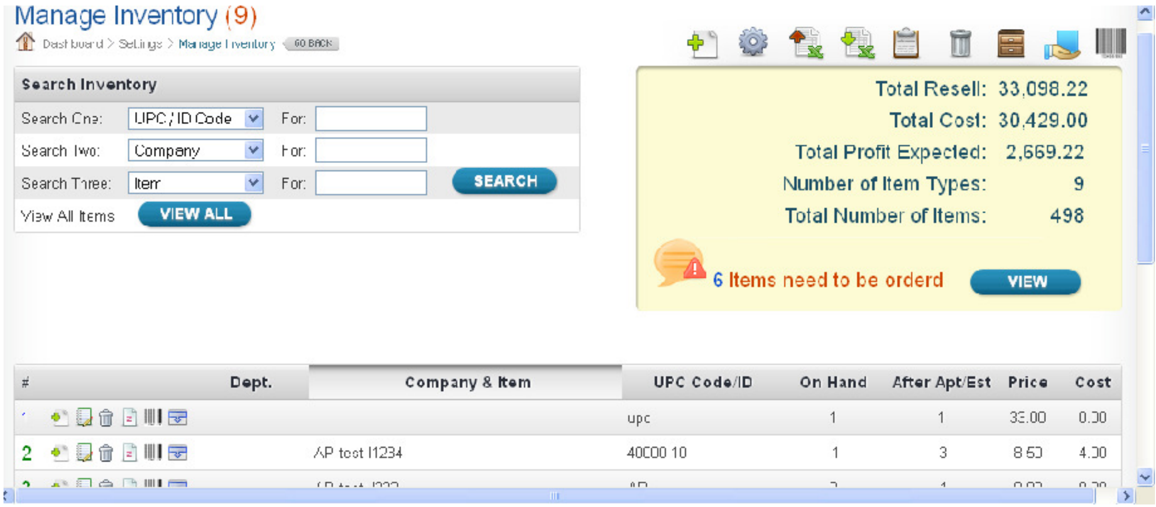
**Option 2**

- Perform SQL Query. This allows you to paste and restore the dump file of your MySQL database.

## Manage Inventory

The **Manage Inventory** feature allows you to create an **inventory**, **insert**, **remove** and **modify** items as well as insert a picture for each item. It also allows you to set quantity before being automatically reminded to order more. Being a service oriented invoicing system, Web Invoice has a feature known as **Service Inventory**, which allows you to add an item along with its price, quantity, cost and discount department, as well as the labor associated with the item. You can use the item's **UPC code** or labor code to access the item and all the labor associated with it simultaneously. This is true unless you have many items associated with one labor, at which point you will have to enter them in several steps.

The Inventory module is required if you want to sell items through the shopping cart feature as well as POS using Barcodes.




## Accessing an Item Using the Barcode , (UPC) Code and Associated Labor

- To Access an Item Using the UPC Code and Associated Labor
  - Make a selection in the dragdown menu in fields **Search, Search 2** and **Search 3** and click **Go**. The results are displayed beneath on the left side of the screen.

*Accessing an Item Page*

## Detailed View of an Item In Inventory

As you can see, there's a link which says "Personal Price", after clicking on it you'll get a popup as shown below:

Is this option still available?

# Manage Services

# Manage Checklist

# Helpdesk Presets

# Mass Emailing Options

# Change Company Logo

# License Info

# System Info

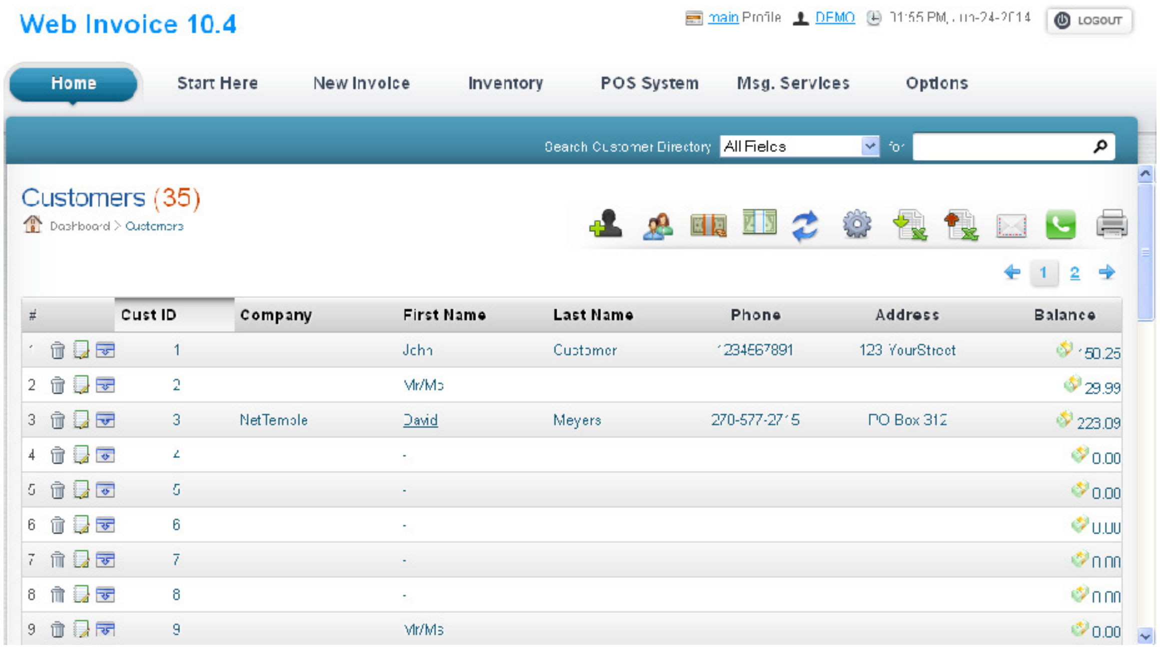
# Customer Directory Page

The **Customers** section button is located in the top left corner of the grid and takes you to the **Customer Directory Page**. The Customer Directory Page feature is a searchable customer directory and is a vertical list of customer information. The user is able to scroll through all the pages using the green left and right arrows in the horizontal bar at the top of the screen.  This bar also contains eight buttons with basic feature options.

## Accessing the Customer Directory Page

### To Access the Customer Directory Page

- From the **Main Home Screen**, click on the Customer on the upper left corner. The Customer Directory page will then be displayed.




*Customer Directory Page*

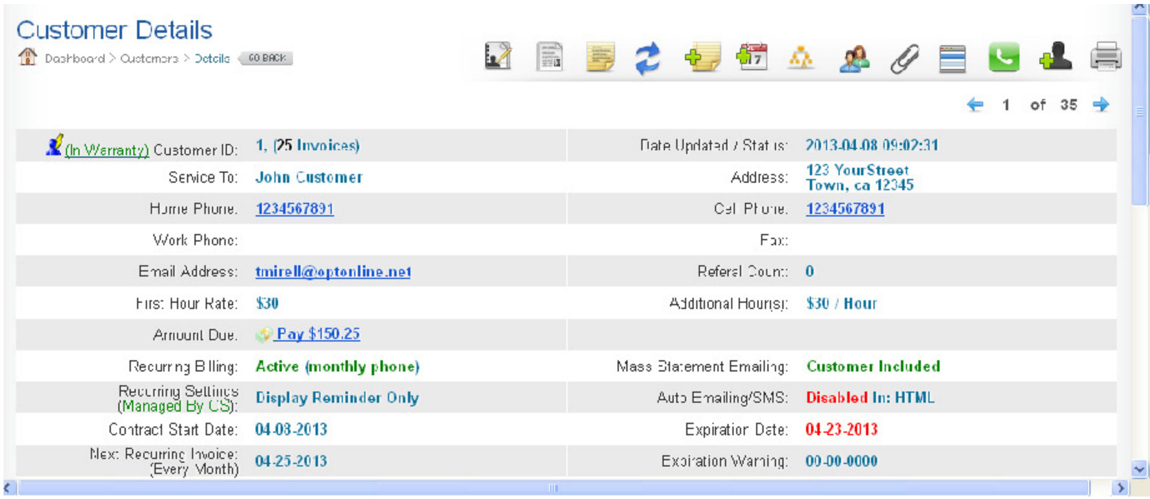
## Using the Customer Directory Page

The Customer Directory Page is arranged in columns and rows and displays customers by **number**, **company name**, **first name**, **last name**, **address** and **balance** due. You can also delete a customer by clicking on the trash can to the left of the customer number in the second column. From the **Customer Directory Page** you are able to **view customer invoice information**, **enter new customers**, **change the tax rate for all customers**, **synchronize the customer list to newest invoices**, **customize fields**, **print the page**, **import and export customers from and to a CSV file** and **send a mass email to the customers on the list**. The features in the **Viewing Customer Invoice Information** will be described before the eight basic features in the Customer Directory bar.

### Viewing Customer Invoice Information

### To View Customer Invoice Information

- Click on a customer number or name in the **Customer** or **First Name** list. That customer's invoice information is displayed.

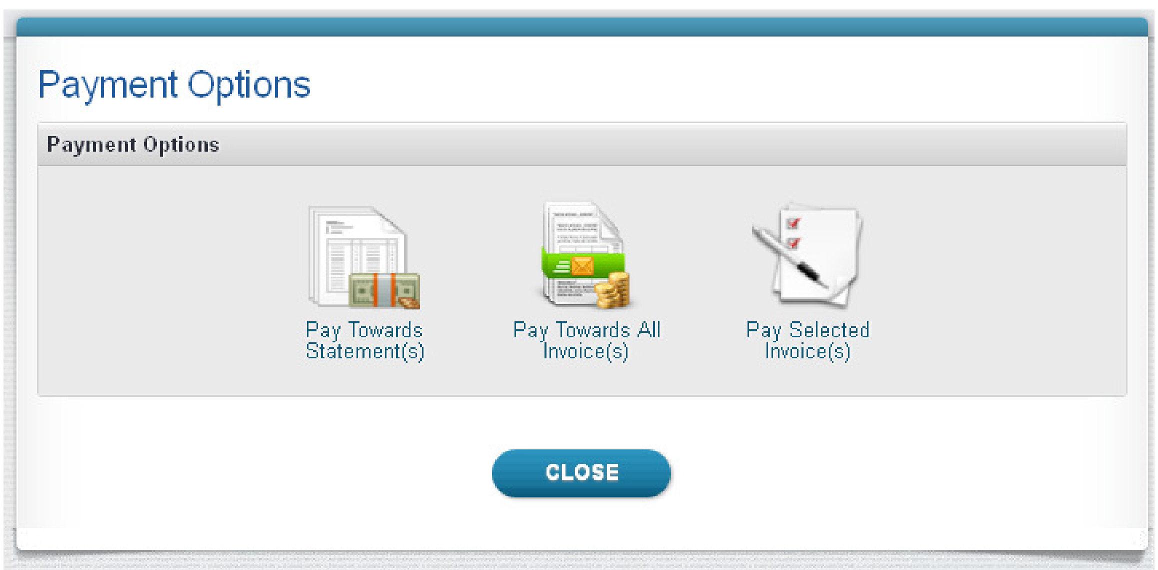



*Customer Invoice Information Page, (Not all data is shown in this clip)*

From this page you also have the option to **make a payment**, **view the agreement**, **attach a file** and **view your statement**.

### To Make a Payment

1) Click on the word **Pay $xx** to the right of the words **Amount Due** or click on the **Pay Now** icon in the bar at the top of the screen. The **Payment Processing Options** screen opens in a new window.




*Payment Processing Options Screen*

2) Choose a payment method or click **Close** to close the screen.

### To View the Agreement

- Click on the word **Agreement** to the right of the notebook icon. The Agreement window is displayed in a new screen.


*Agreement Window*

### To Create a New Agreement

1) Click on **New Agreement.** The New Agreement page is displayed in a new screen.
2) Click **Browse** and attach a file from your computer and click on the **Click Here to Enter Data** button. The file is attached.

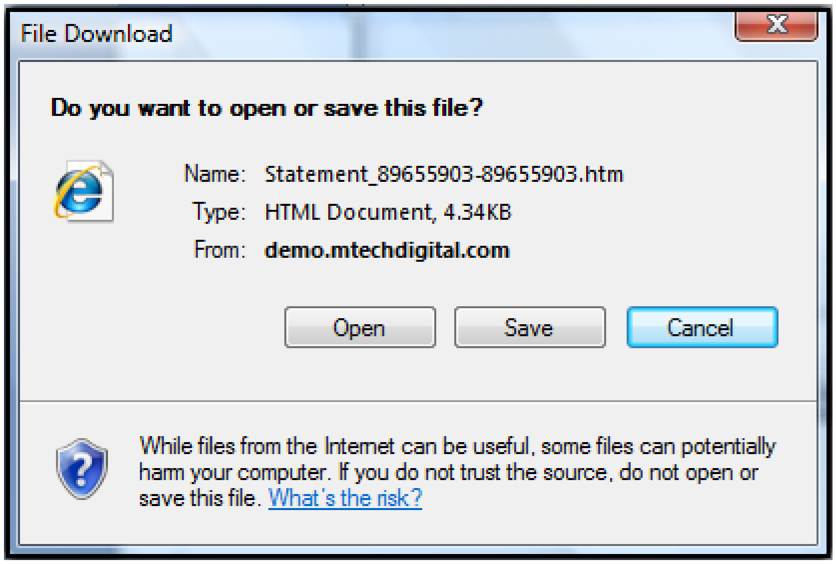

*Agreement Page*

### To Attach a File

Not working

### To View Your Statement

- Click on the computer icon at the bottom of the screen. A window is displayed with the option to **Open**, **Save** or **Cancel**.

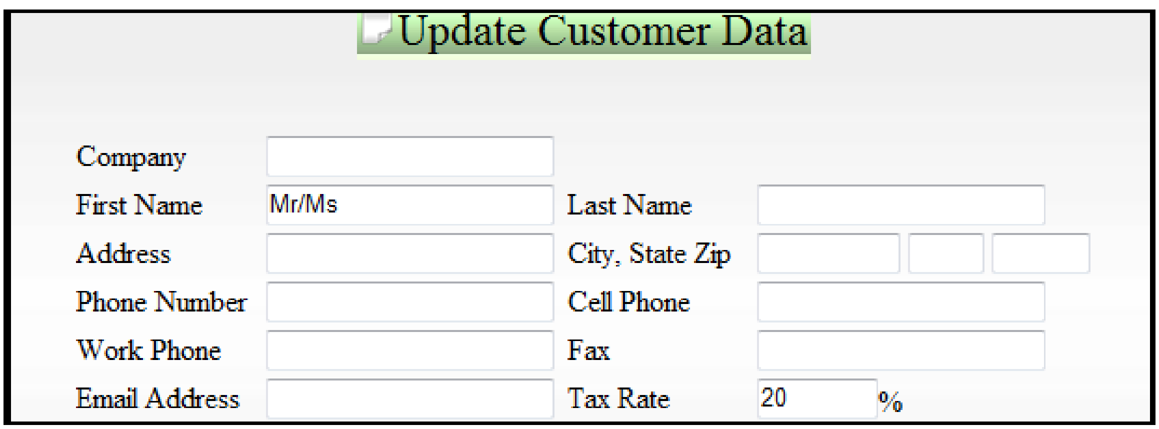



*File Download Window*

From the horizontal bar at the top of the Viewing Customer Invoice Information page you have the option to **Edit Data**, **View Statements**, **List Invoice(s)**, **Email Statements**, view **Recurring Bills**, **Create Invoice**, **Create Appointments/Estimates**, **Make Payments**, **Attach** files and **Create End-Users**.

## Editing Data

The **Editing Data** feature allows you to **update customer data** by filling out customer and invoice information in the fields.



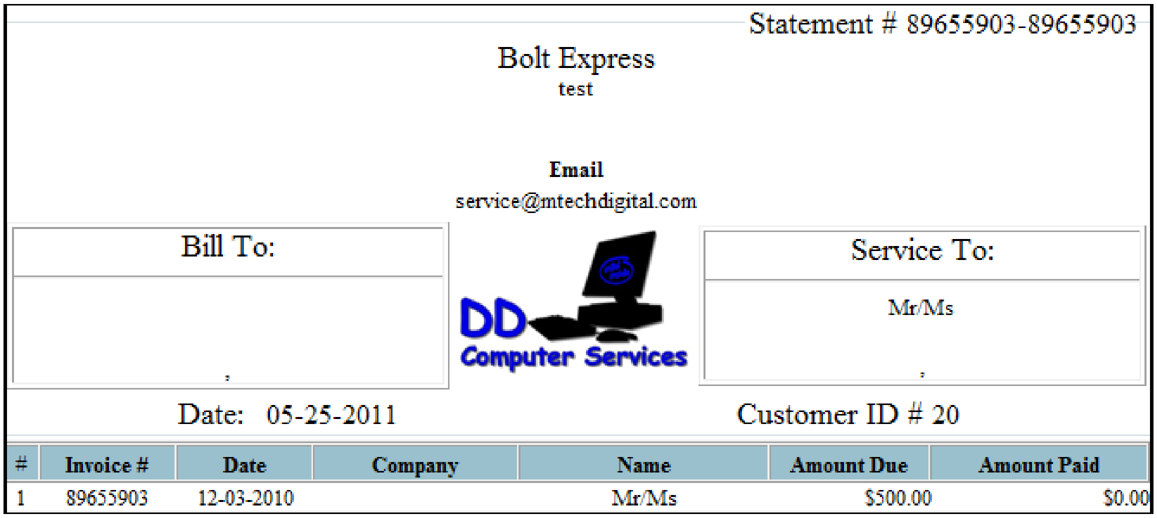

*Update Customer Data Page*

To Edit Data

- Fill out the fields and click on the **Enter Above Data** button at the bottom of the page. The data is edited.

## View Statements

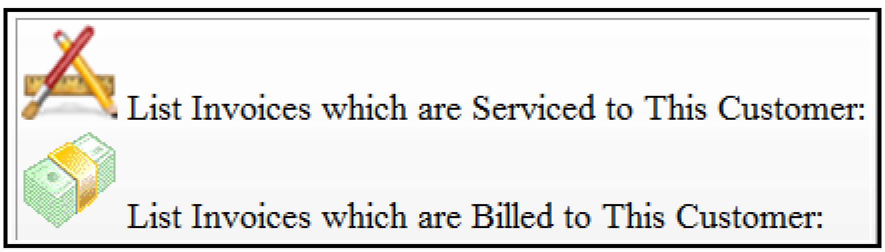
The **Viewing Statements** feature allows you to view statement and payment information and is displayed in a new window.




*Viewing Statements Window*

## List Invoice(s)

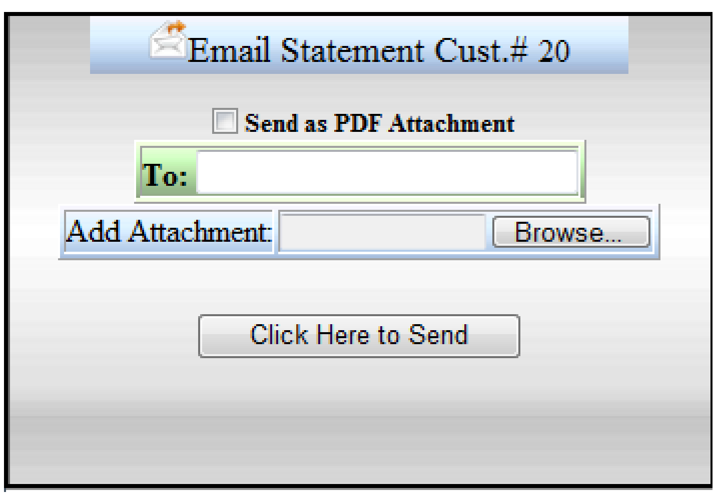
The **List Invoice(s)** feature allows you to either list invoices which are serviced or billed to the customer and is displayed in a new window.




*List Invoices Window*

## Email Statements

The Email Statements feature allows you to add attachments to invoices and is displayed in a new window.



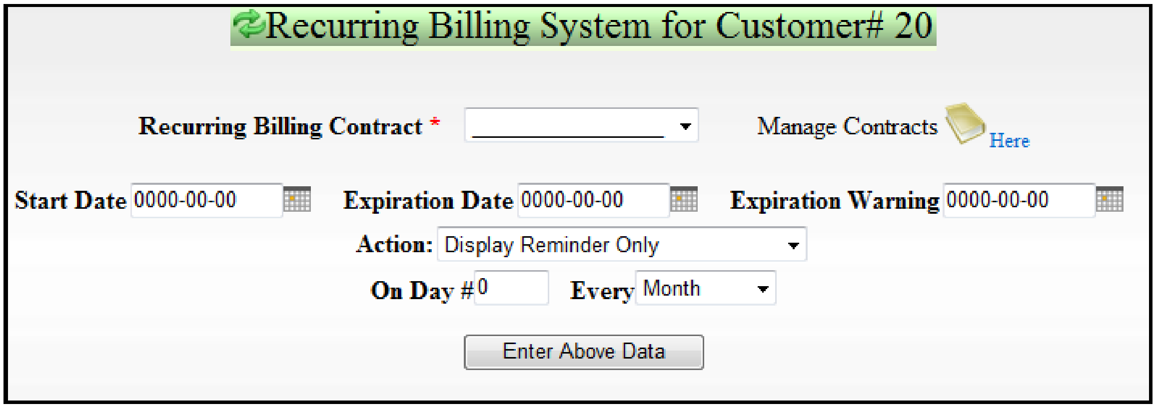

*Email Statements Window*

➔ To Email Statements

1) In the **To** field write an email address.
2) Click **Browse**, select a file from your computer and click the **Here to Send** button. The email statement is sent.

## Recurring Bills

The **Recurring Bills** feature allows you to view and edit recurring billing information and is displayed in a new window.



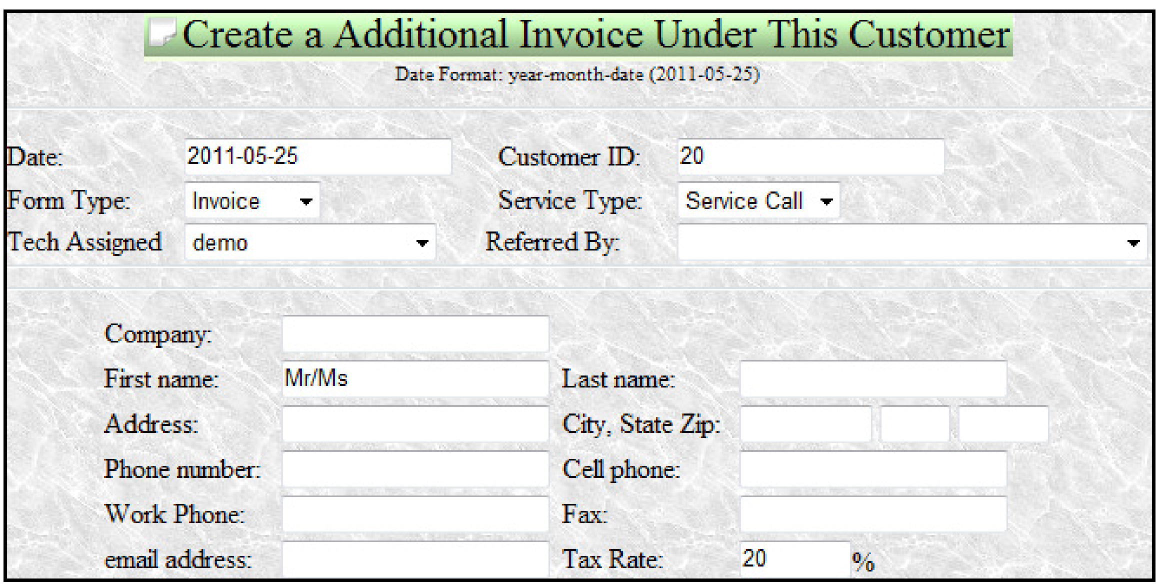

*Recurring Bills Window*

➔ To Edit Recurring Bills

- Fill out the fields and click the **Enter Above Data** button. The recurring billing information is edited.

## Create Invoices

The **Create Invoices** feature allows you to create an additional invoice for a customer.

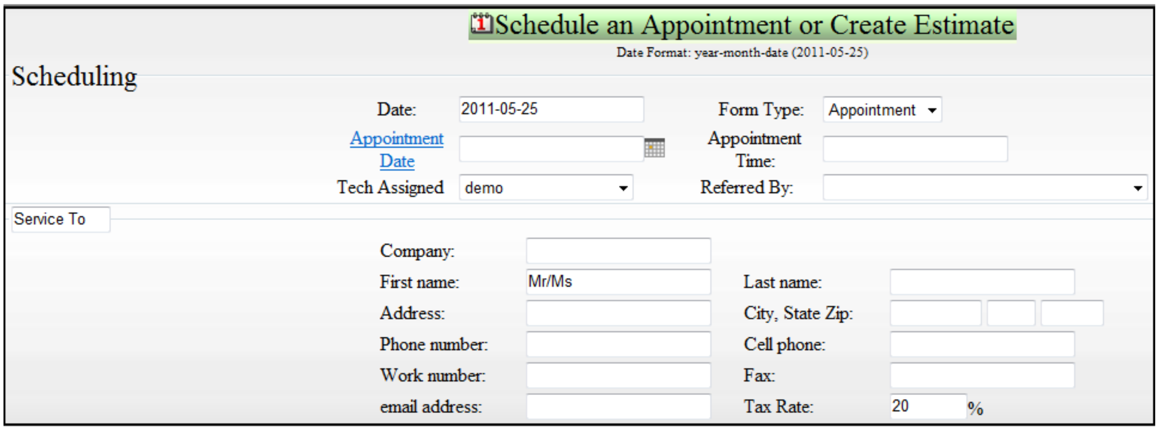



*Create an Invoice Page*

- To Create an Invoice Page
  - Fill out the fields and click on the **Click Here to Input DATA** button at the bottom of the page. The invoice is created.

## Create Appointments/Estimates

The **Create Appointments/Estimates** feature allows you to schedule an appointment or create an estimate.

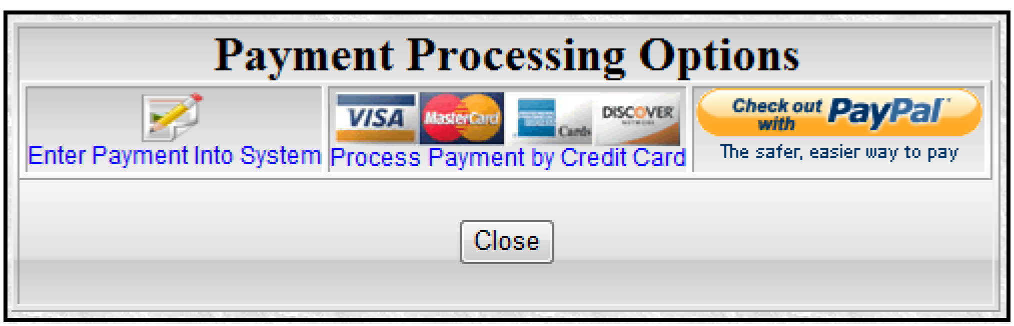



*Create Appointments/Estimates Page*

- To Create Appointments/Estimates
  - Fill out the fields and click on the **Click Here to Schedule** button at the bottom of the page. The appointment or estimate is created.

## Pay Now

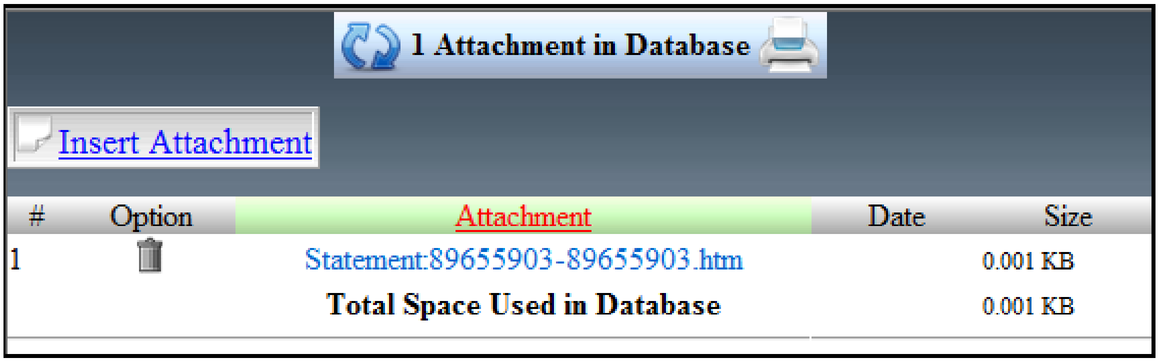
The **Pay Now** feature allows you to make payments, opens in a new window and is the same as the **Make a Payment** feature in the **Customer Directory Section**.




*Payment Processing Options Screen*

## Attachments

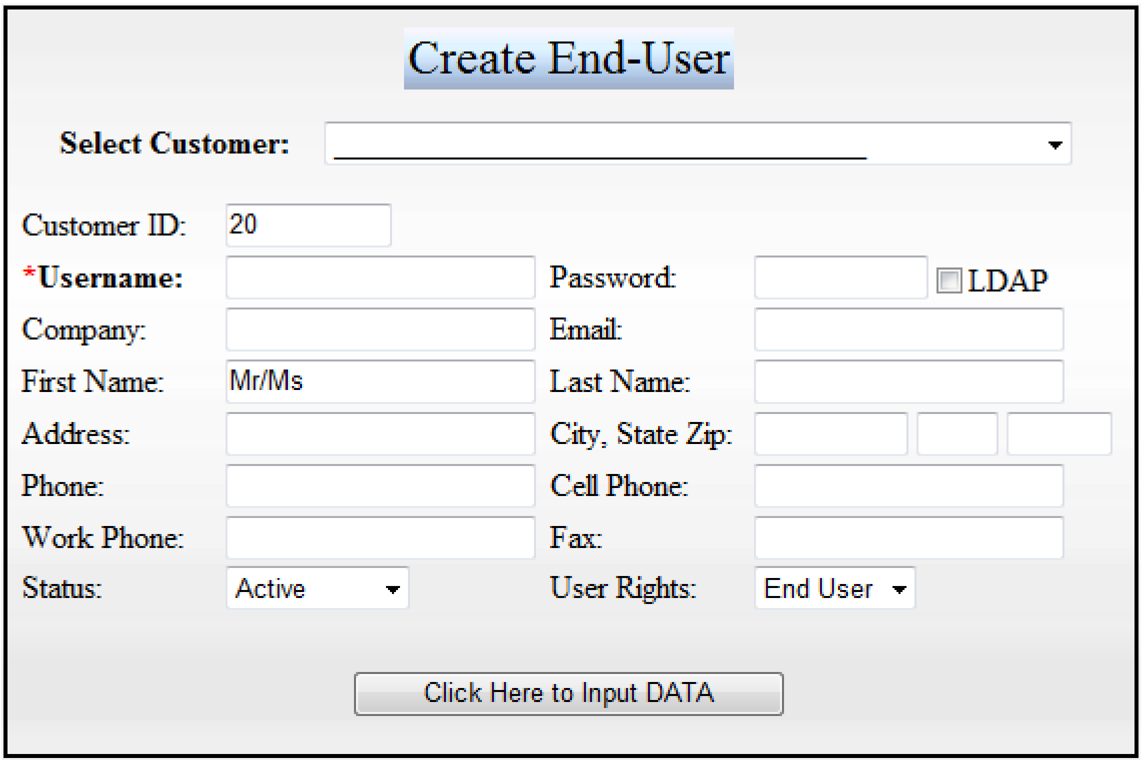
The **Attachments** feature allows you to view and insert attachments.



*Attachments Page*

### Create End-Users

The Create End-Users feature allows you to Create End-Users.



*Create End-User Page*

To Create End-Users

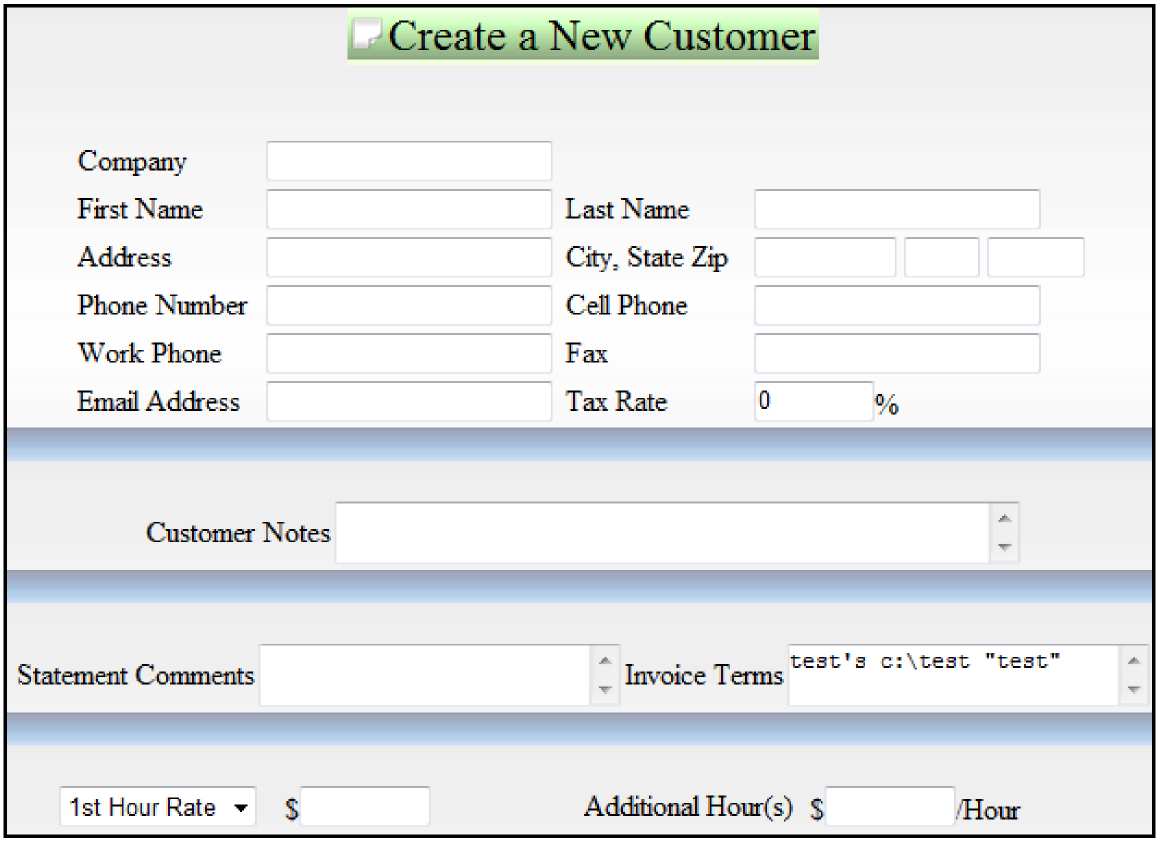
- Fill out the fields and click on the **Click Here to Input DATA** button at the bottom of the page. The end-user is created.

## Customer Directory Bar Features

There are eight basic features in the **Customer Directory Bar** at the top of the page.

### Enter New Customer

**The Enter New Customer** feature allows you to create new customers by filling in the fields.



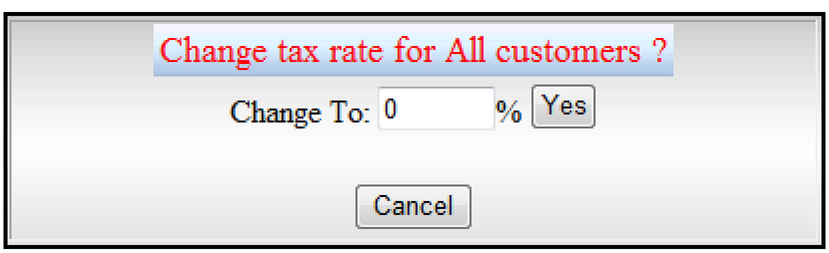

*Create a New Customer Page*

To Create a New Customer

- Fill out the fields and click on the **Enter Above Data** button at the bottom of the page. A new customer is created.

## Change Tax Rate for All Customers

The **Change Tax Rate for All Customers** feature allows you to change the tax rate by percentage and is displayed in a new screen.



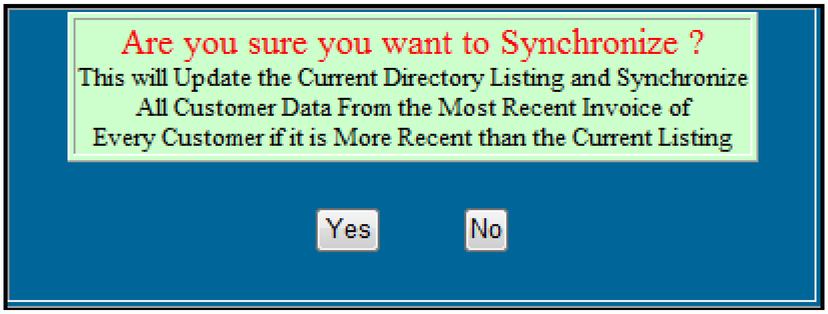

*Change Tax Rate for All Customers Screen*

To Change Tax Rate for All Customers

- Type a number in the **Change To** field and click **Yes**. The tax rate is changed for all customers.

## Synchronize Customer List for Newest Invoice(s)

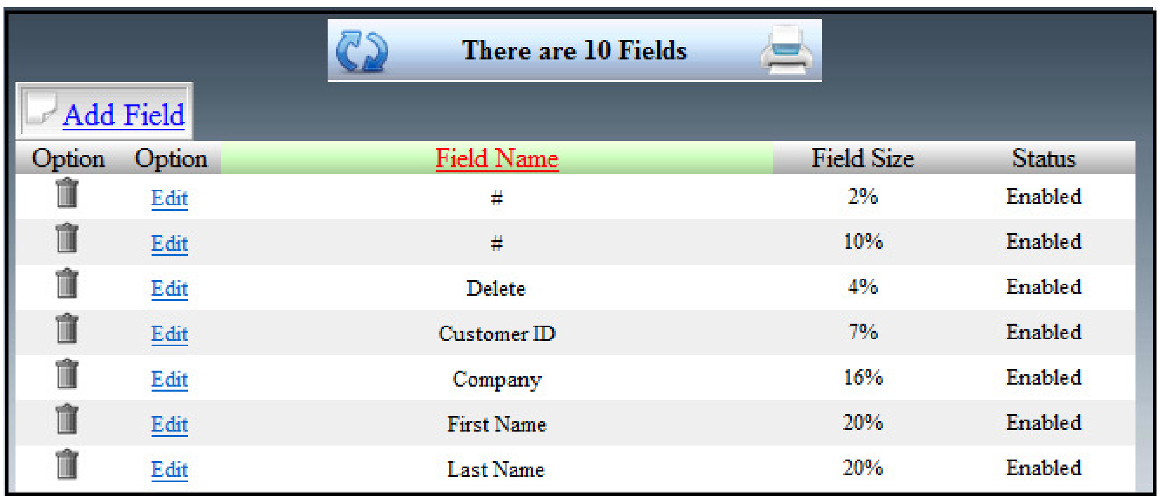
The **Synchronize Customer List for Newest Invoice(s)** feature allows you to update customer information, update the current directory listing and synchronize all customer data from the most recent invoice of every customer to the more recent version.




*Synchronize Customer List for Newest Invoice(s) Page*

## Customize Fields

The **Customize Fields** feature allows you to customize and add fields and the Customize Fields page is displayed.



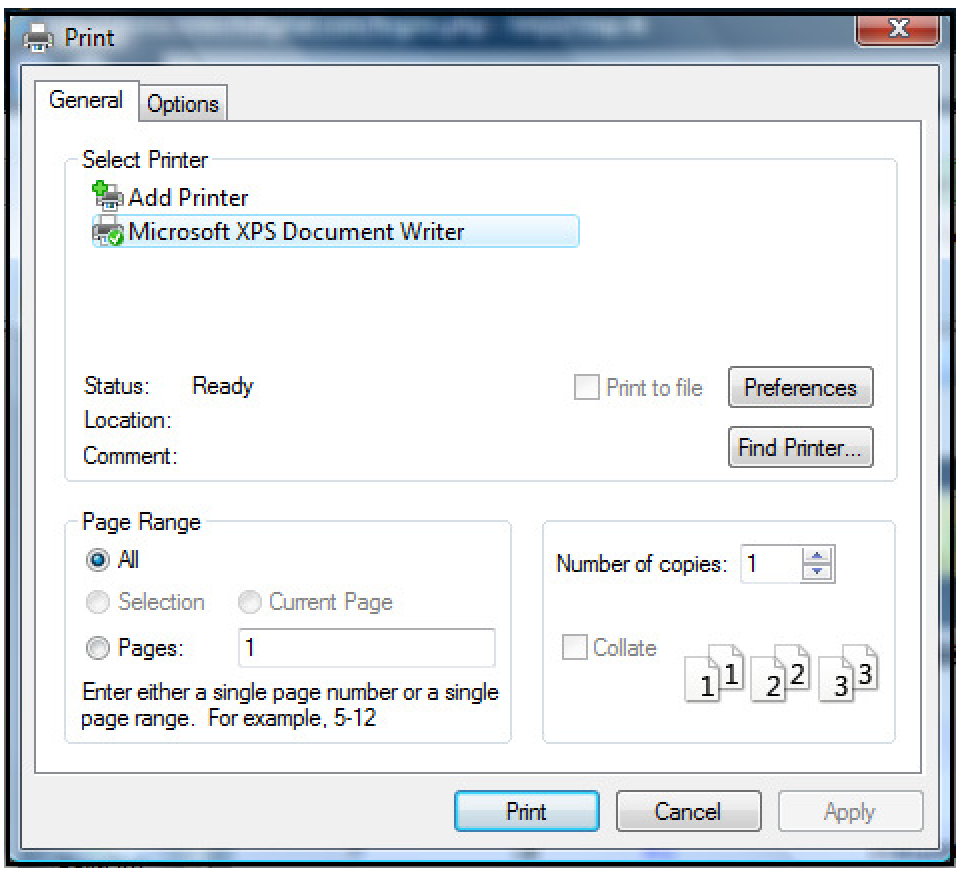

*Customize Page*

Clicking on **Add Field** will display the **Add a Field to the Customer List** screen in a new window.


*Add a Field to the Customer List Page*

## Print this Page

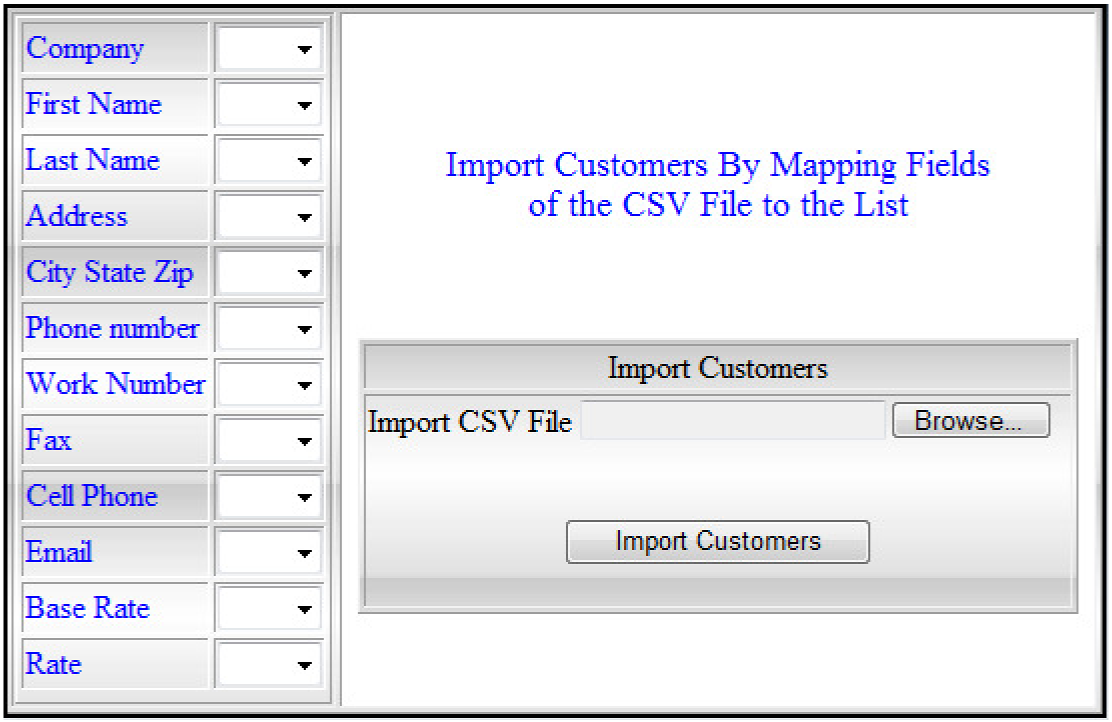
The **Print this Page** feature allows you to print the page.




*Print Page*

## Import Customers from CSV File

The **Import Customers from the CSV File** feature allows you to import customers by mapping fields of the CSV file to the list.



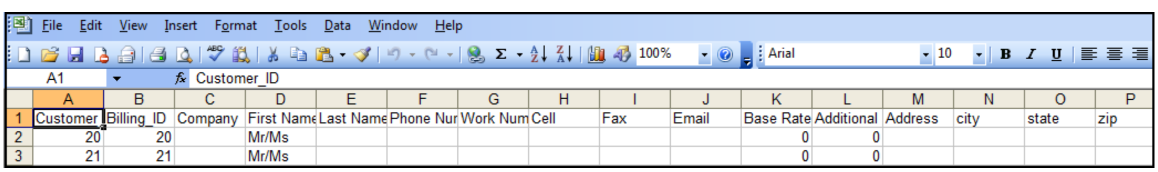

*Import Customers from CSV File Page*

## To Import Customers from the CSV File

1) Make selections using the dragdown menus on the left.
2) Click **Browse**, select a file from your computer and click on the **Import Customers** button. The customers are imported from the CSV file.

## Export Customers to the CSV File

The **Export Customers to CSV File** feature allows you to open or save an Excel file of the Customer Directory Page.




*Export Customers to CSV File Page*

## To Export Customers to the CSV File

1) Click on the **Export Customers to CSV File** button. The **File Download** window is displayed.
2) Click **Open** or **Save.** The file is opened or saved to your computer and the customers are exported to the CSV file.

## Mass Email to Customers

The **Mass Email to Customers** feature allows you to send an email to any or all customers on the invoice list.


*Mass Email to Customers Page*

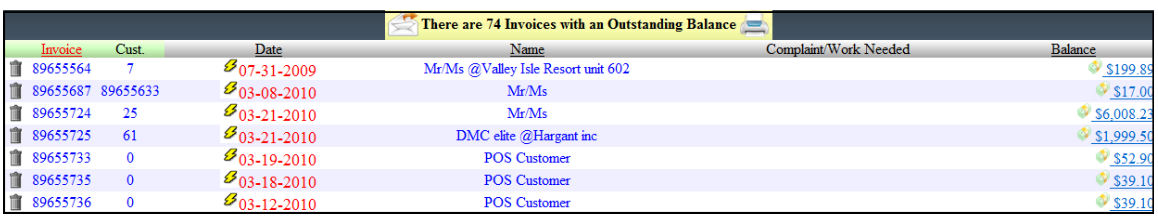
To Mass Email Customers

1) Type a subject header in the **Subject** field.

2) Type the text of the message in the large field and click on the **Click Here to Send** button. The email is sent.

## Open Invoices

The **Open Invoices** page displays invoices with a balance due.



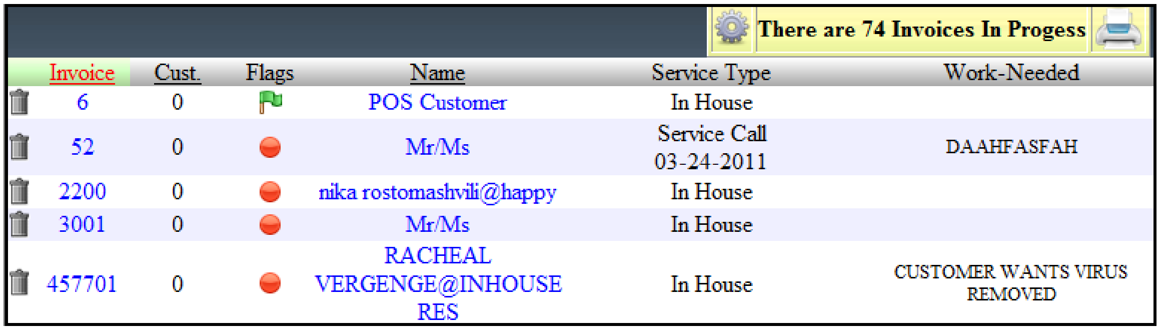
There are 74 Invoices with an Outstanding Balance

| Invoice | Cust. | Date | Name | Complaint/Work Needed | Balance |
|---|---|---|---|---|---|
| 89655564 | 7 | 07-31-2009 | Mr/Ms @Valley Isle Resort unit 602 | | $199.89 |
| 89655687 | 89655633 | 03-08-2010 | Mr/Ms | | $17.00 |
| 89655724 | 25 | 03-21-2010 | Mr/Ms | | $6,008.23 |
| 89655725 | 61 | 03-21-2010 | DMC elite @Hargant inc | | $1,999.50 |
| 89655733 | 0 | 03-19-2010 | POS Customer | | $52.90 |
| 89655735 | 0 | 03-18-2010 | POS Customer | | $39.10 |
| 89655736 | 0 | 03-12-2010 | POS Customer | | $39.10 |

*Open Invoice Page*

### In Progress

The **In Progress** page displays incomplete invoices, Customer Number, Flags, Customer Name, Service Type (In House or Service Call) the time in which the job is expected to be completed and the type of work, if any, is needed. Information in this page can be viewed by **Invoice**, **Cust.** or **Name**.

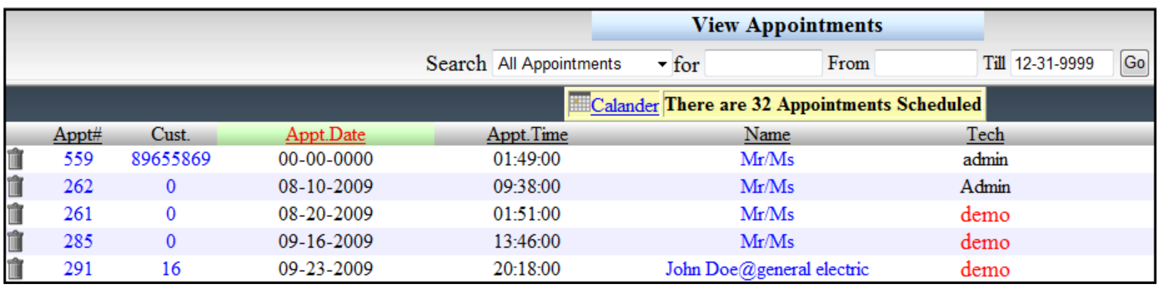

There are 74 Invoices In Progess

| | Invoice | Cust. | Flags | Name | Service Type | Work-Needed |
|---|---|---|---|---|---|---|
| | 6 | 0 | | POS Customer | In House | |
| | 52 | 0 | | Mr/Ms | Service Call 03-24-2011 | DAAHFASFAH |
| | 2200 | 0 | | nika rostomashvili@happy | In House | |
| | 3001 | 0 | | Mr/Ms | In House | |
| | 457701 | 0 | | RACHEAL VERGENGE@INHOUSE RES | In House | CUSTOMER WANTS VIRUS REMOVED |

*In Progress Page*

## Appointments

The **Appointments** page displays appointments that can be converted into invoices and allows you to **View** and **Search** appointments using fields located at the top of the page. There is also a clickable **calendar** option at the top of the page beneath the fields. What does the calendar do?


View Appointments

Search All Appointments for From Till 12-31-9999 Go

Calander There are 32 Appointments Scheduled

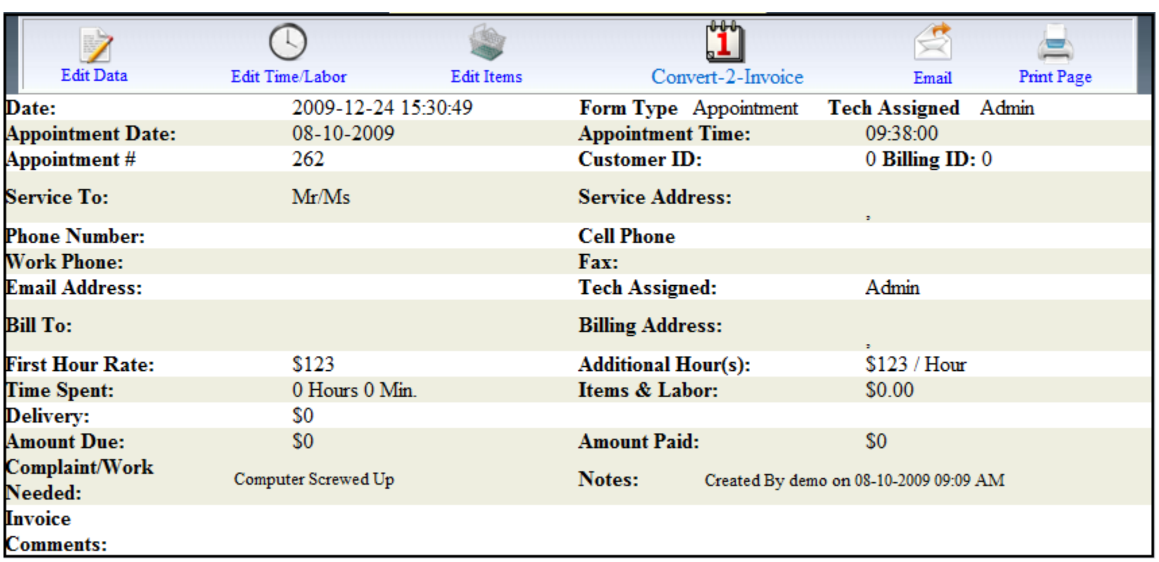
| | Appt# | Cust. | Appt.Date | Appt.Time | Name | Tech |
|---|---|---|---|---|---|---|
| | 559 | 89655869 | 00-00-0000 | 01:49:00 | Mr/Ms | admin |
| | 262 | 0 | 08-10-2009 | 09:38:00 | Mr/Ms | Admin |
| | 261 | 0 | 08-20-2009 | 01:51:00 | Mr/Ms | demo |
| | 285 | 0 | 09-16-2009 | 13:46:00 | Mr/Ms | demo |
| | 291 | 16 | 09-23-2009 | 20:18:00 | John Doe@general electric | demo |

*View Appointments Page*

### Converting Displayed Appointments into Invoices

To Convert Displayed Appointments into Invoices

1) Click on an item in the **Appt. #** or **Name** list. The **Details Invoice Page** is displayed.


Edit Data | Edit Time/Labor | Edit Items | Convert-2-Invoice | Email | Print Page

| | | | |
|---|---|---|---|
| **Date:** | 2009-12-24 15:30:49 | **Form Type** Appointment | **Tech Assigned** Admin |
| **Appointment Date:** | 08-10-2009 | **Appointment Time:** | 09:38:00 |
| **Appointment #** | 262 | **Customer ID:** | 0 **Billing ID:** 0 |
| **Service To:** | Mr/Ms | **Service Address:** | , |
| **Phone Number:** | | **Cell Phone** | |
| **Work Phone:** | | **Fax:** | |
| **Email Address:** | | **Tech Assigned:** | Admin |
| **Bill To:** | | **Billing Address:** | , |
| **First Hour Rate:** | $123 | **Additional Hour(s):** | $123 / Hour |
| **Time Spent:** | 0 Hours 0 Min. | **Items & Labor:** | $0.00 |
| **Delivery:** | $0 | | |
| **Amount Due:** | $0 | **Amount Paid:** | $0 |
| **Complaint/Work Needed:** | Computer Screwed Up | **Notes:** | Created By demo on 08-10-2009 09:09 AM |
| **Invoice Comments:** | | | |

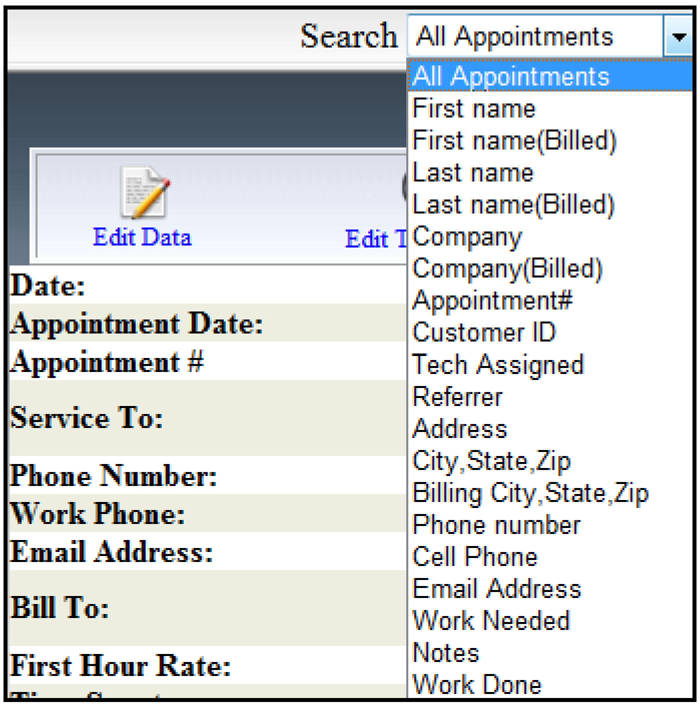
2) Click on the 

button. The following message is displayed.


## Searching Appointments

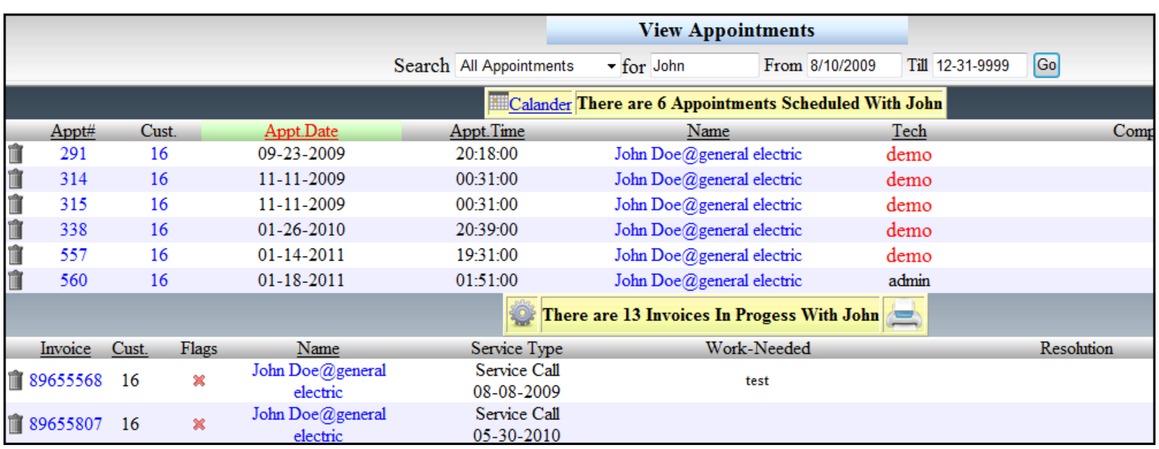
### To Search Appointments

- From the **Search Appointments Dragdown Menu**, choose your desired appointment type and click on the **Go** button to the right of the fields.




*Search Appointments Dragdown Menu*

An invoice list appears according to your selection.




*Invoice List Page*

# All Invoices

The **All Invoices** page displays all invoices which are completed and are searchable by date and other criteria.

## Viewing Invoices

### To View Invoices

- Write the beginning and ending invoice dates you want to view in the **From** and **Till** fields and click on the View Invoices [View Invoices] button. The **All Invoices Page** is displayed.

| Invoice | Cust. | Date | Name | Tech | Work-Needed | Resolution | Balance |
|---|---|---|---|---|---|---|---|
| 89655973 | 89655712 | 05-25-2011 | invoice1 @test1 | demo | Date: 05-13-2011 12:24 AM Name: invoice1 (Client)...... | -- 05-13-2011 12:25 AM, Bolt Express - (Staff) Please allow 12-24 hours for processing We...... | $0.00 |
| I/P89655972 | 89655893 | 05-23-2011 | xxxx xx | demo | vxcvvvvvvvvvvvvvvvvvv | | $10.40 |
| 89655971 | 0 | 05-15-2011 | POS Customer | demo | | | £20.00 |
| 89655969 | 89655712 | 05-13-2011 | invoice1 @test1 | demo | Date: 05-13-2011 12:24 AM Name: invoice1 (Client)...... | -- 05-13-2011 12:25 AM, Bolt Express - (Staff) Please allow 12-24 hours for processing We...... | $0.00 |
| 89655970 | 89655712 | 05-13-2011 | invoice1 @test1 | demo | Date: 05-13-2011 12:24 AM Name: invoice1 (Client)...... | -- 05-13-2011 12:25 AM, Bolt Express - (Staff) Please allow 12-24 hours for processing We...... | $0.00 |
| 89655968 | 61 | 05-12-2011 | DMC elite @Hargant inc | demo | | fixed computers | $240.83 |
| p89655966 | 0 | 05-03-2011 | POS Customer | demo | | | £0.00 |
| 89655964 | 89655891 | 05-01-2011 | James Bond | demo | | | $500.00 |

*All Invoices Page*

*If you're using Web Invoice 9.0, you need to upgrade to version 9.1 to avoid data loss.*

# Help Desk Tickets

The **Help Desk Tickets** page displays new/open or closed/awaiting response service requests and can be viewed by **SR (Search Request)#**, **Date/Time** or **Name**.

| SR# | Date/Time | Flags | Name | Email | Urgency | Category |
|---|---|---|---|---|---|---|
| 576 | 2011-02-27 18:16:04 | | Mr/Ms | | Not-Urgent | |
| 578 | 2011-03-03 02:45:46 | | Mr/Ms | | Not-Urgent | |
| 582 | 2011-03-31 13:57:36 | | John Doe@general electric | | Low | blue screen of death |
| 594 | 2011-04-12 09:10:19 | | Mr/Ms | | Not-Urgent | no internet |
| 602 | 2011-04-25 23:15:48 | | Mr/Ms | | Not-Urgent | no internet |
| 608 | 2011-05-02 07:40:29 | | Mr/Ms | | Not-Urgent | Boot Failure |
| 613 | 2011-05-06 16:58:34 | | invoice1 @test1 | | Not-Urgent | black screen |
| 615 | 2011-05-11 20:37:45 | | invoice1 @test1 | | Not-Urgent | black screen |
| 618 | 2011-05-21 01:27:54 | | invoice1 @test1 | | Not-Urgent | black screen |

Delete Selected

*Help Desk Page*

# Contracts

The **Contracts** page displays a list of customers with contracts, **Company Na**me, **First Name**, **Last Name**, **Address** and **Balance** due. and notes (where are the notes?)

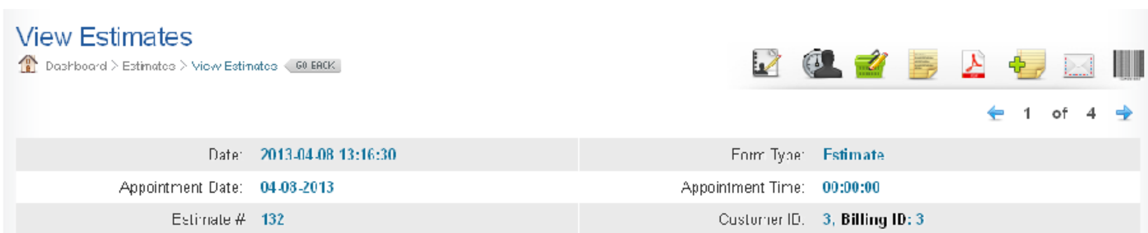
# Estimates

The **Estimates** page displays estimates that can be turned into invoices and allows you to create **New Templates**, which allow you to manage recurring work, parts and labor hours.


*Estimates Page*

## Turning Estimates into Invoices

- To Turn an Estimate into an Invoice, click on the Estimate, then click on the icon 3rd from the right.




## Creating New Templates

Displays Templates which are created and allows you to also create a new template for recurring work, including all parts and labor hours.

- To Create New Templates

1) Click on New Template New Template link in the **Estimates Page**. The **Create a New Template Page** is displayed.

2) Click on the **Click Here to Input DATA** button at the bottom of the page. The new template is created.

## Turning Templates into Invoices

- To Turn a template into an Invoice

- Click on the number beneath the word **Template**.
  Click on the Select button to after choosing the customer you want the Invoice to be made out to.


From the top left to the bottom right:

### Customer Stats / Accounting:

An area where you can view how much was earned and collected in a given time span. It will also display how much you've earned in a given month, the average per month, and the sum. It will display how much is being collected just on parts, or on labor. It will also show you stats of how many customers you have and how many new customers you acquire in a monthly basis. It will also show how much in taxes where collected. It will Display all invoices associated with the stats being shown. We'll discuss this section in greater detail later on.

### Backup/Restore:

Allows you to make a backup of the whole database or 1 profile at a time. Note, you can also make backups on your own using **PHPMYADMIN** or any other backup method if you'd like to, instead. You also have the option to restore the Database. allows you to backup the system and restore it

### Customer Directory:

This is similar to the other customer directory show above, how ever, it gives you an option to resync a specific customer with its corresponding invoice, and re create that customer if you've deleted it.

### Referral Agents:

Allows you to create an agent if they've referred anyone to you, and they can get a percentage of the total invoice if you choose to, and it'll show up in Payroll.

### Profile Options:

Allows you to create a new profile, delete the current profile, clear the current profile, or switch between profiles.

### Contracts:

Allows you to create a contract reminder of what type of work is agreed upon and this can later be implemented into the customer within customer directory in order to possibly create invoices to people who have a contract very quickly all at once.

### Discount Presets:

Allows you to create a preset of a certain type of discount. You can type in the percentage of discount or currency amount, and reason for discount and it'll remember it for when ever you want to use it and insert it into the invoice.

### Users / Techs:

This is the area which you can create/delete/modify user accounts. Each user has 3 levels of privileges.

1) **Admin**: highest level able to control system, but does not get included in payroll.
2) **Dispatcher**: Has less privileges, can not enter into Options page, but can create appointments and invoices.
3) **Tech**: can only deal with invoices assigned to them and has no access to administrative features.
4) **End Users**: Manages the end users which can be customers who are able to log in and check the status of their invoice or appointment. They can also create service requests. It can also be for external non-customer users who want ho are able to log in and create a service request.

### Edit My Info:

Allows you to enter your information of the company which will be displayed on the invoice itself, and other information such as:

- Payment due time, warning flag which appears after that time.

This section also included configuration for incoming and outgoing email servers.

### General Tax Rate:

Amount of invoices that can be displayed per page and the amount of Customers per page. Whether or not its generally a service call or an In-House job, Default currency, and what kind of work being done, "service to: " Also, Email Server Settings : Username, Password, Email Server and Port number, Default is 25.

### Change Password:

Allows you to change your password.

### Manage Inventory:

Allows you to create Inventory, Insert, Remove, Modify Items. It'll also allows you to set quantity, and minimum quantity before a reminder shows up to order more. Since Web Invoice is a Service Oriented Invoicing system, It has a feature we call Service Inventory. What this means is. You can add an item, with price, quantity, cost, Discount department. And more, but what's different is, you can also add the labor to go along with the item itself. This means, when creating an invoice, you can simply enter the upc code of the item or the code of your item or labor, and it'll bring up the item and all the labor attached to it in one shot. This means, there's no need to enter items in one step and labor in another. Unless you have many items with one labor Detailed View of an item In Inventory.

As you can see, there’s a link which says “Personal Price”, after clicking on it you’ll get a popup as shown below:

### Adding, Subtracting or Editing and Inventory Item:

You can edit the Cost, Price Quantity On-Hand +/- to add or subtract quantity On-Hand. Give a discount to when ever this item is pulled, edit the amount added or removed, give a minimum quantity warning of when to order more, change department of item, and UPS code or fast insertion code(item). View log file of how much was inserted or how much was removed and from which invoice at what time. And, edit Labor which can be attached to the item.

This is great when doing a service and including an item from inventory, which makes adding the service labor and item insertion easy because it’s all done in one quick step. Personal Pricing is a Feature which allows you to set a price for a particular customer and the system, will automatically map any invoice with that customer to this specific price on this specific item. You can insert as many customers as you’d want to this particular item. Giving them their own personal prices.

### Manage Service:

Allows you to add preset Services with a flat rate price and/or an hourly Price.

*Notice: this data can be easily imported into Inventory above by clicking on “Auto Rate Assignment.”*

### Manage Checklist:

This allows you to Create checklist items which can automatically be imported into your invoice. This will ensure that if you need a set amount of things taken care of per invoice, it’ll keep track of it and not allow you to close the invoice till they are all completed. A Checklist item that is marked **transferable** and is in the group of **general** will automatically be imported into an invoice after creation. Check list items can also be imported into an invoice at any time.

### Manage Departments:

Allows you to create departments for items which also handle tax data.

### Mass Email All Customers:

This is a powerful feature which is more or less a mailing list to all of your customers. It can be used to email announcements. In text format or in html.

### Mass Email Balance Due:

Another powerful Emailing feature which will email all customers their invoice with a reminder in the subject, if their invoice has not yet been paid.

### License Information:

Displays Information such as amount of Users, Customers, Profiles and Inventory that is currently In use and the maximum allowed by your license.

### Payroll:

This is a mini payroll system which is great if you have workers who are getting paid by the hour to do service calls for you. It also has a reverse calculation which will tell you how much your worker owes you if the money has been given to him directly from the customer and he will pay you your commission cut for the job.

### Inserting a New Customer:

There are 3 ways to enter in new customers.

- Go to **Customers** on the main page-> Click **View Directory** -> Click on the far left icon of the blank page and you'll see a page appear asking for customer details.
- Importing from a customer list **CSV File** - click on the icon with the picture of the disc. And you'll see a screen asking you to map fields with the field on the CSV file. This will allow you to import many customers at once from other programs such as MS Outlook or any program which exports to CSV File.
- Create a new invoice without pulling any customer data from the customer directory. This will be explained later in the section of Creating New Invoices.

## Creating a New Invoice:

There are several ways to create a new invoice.

- On the top menu bar, click on **New Invoice**. This will simply bring you to the page where you can enter new customer data to first service to, then to **bill to**.
- You can select to copy service to: Data into the bill to section if they will be the same.
- Or you can pull Bill to Data from previous invoices. Since this option is creating a brand new invoice with new customer data. It will **also** create a **new** customer simultaneously. And the customer ID will match this invoice number.

You can also create a new invoice by using existing date from the customer directory. The fastest and easiest way to create a new invoice with an existing customer is to:

1) Click on **New Invoice** on the left bar.
2) Instead of typing in new customer data in the fields, click on where it says select customer, and you'll get a popup list containing a list of customers to choose from.
3) You'll also be able to do a search in that area. Within the customer directory, click on the customer you'd like to create an invoice for, or you can search from on top.
4) Once they appear, click on the customer name or the customer number, and it'll bring you to a details page about that customer.

In this page, you'll see you've got many options on top.

- **Edit data**: Allows you to edit all info about the customer.
- **List Invoice(s)**: Displays all invoices associated with this customer.
- **Create Invoice**: which is what we're interested in at this point. This will bring us to a similar screen which we've seen above, which allows you to enter customers data and invoice data, the difference here however, is, the customer data portion is now filled in and all you need to fill in is invoicing data. This can be hours spent, complaint, work done, and finally parts and/or specific labor.
- Create appointment/estimate.
- Print Data Page.

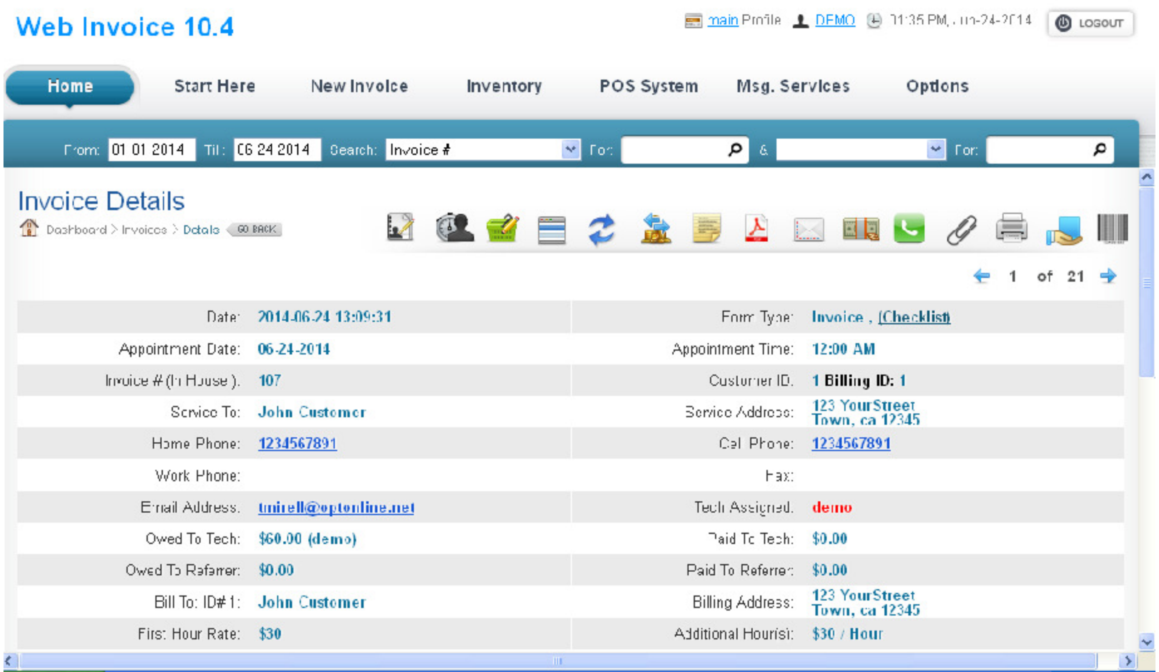
## Creating a New Invoice from an Existing Invoice

You can also create an Invoice Pulling Data from another invoice which had already been entered previously. This is a list of previous invoices which were already created.

- Click on either the Invoice # or the customer Name to view details of the invoice just as earlier when viewing details of a customer from customer directory. If you'd notice, it's very similar to the layout of the customer directory, except there are differences such as actually Invoice Data and pricing.

## Using the Invoice Details Page

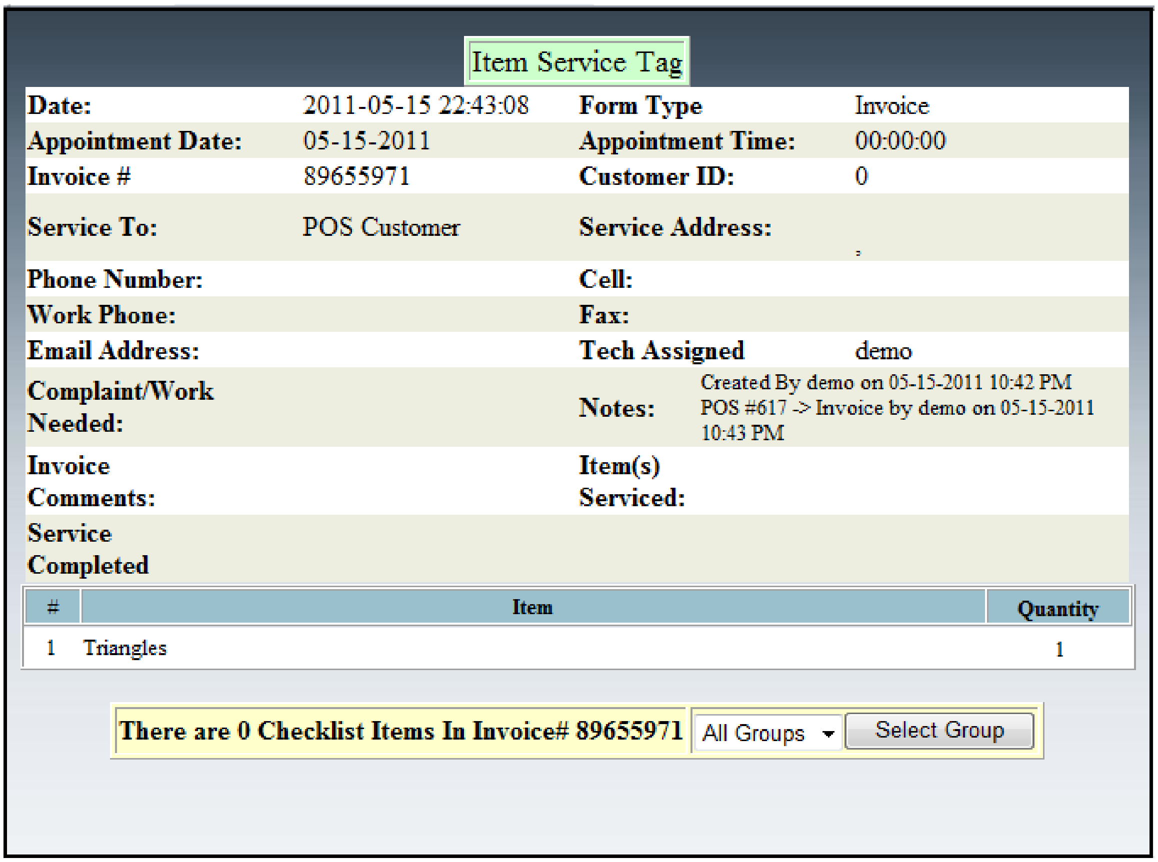
From the **Invoice Details** page you can manage your invoice options and settings.




*Invoice Details Page*

The other features available from the Invoice Details page are:

- **Edit Data**: Edit all data for the invoice and customer.
- **Edit Time/Labor**: Track time worked, labor wages and invoice status.
- **Edit Items**: Update items and itemized labor and add an item and/or labor manually.
- **Change Status**: Change invoice status.
- **View Invoice**: View the current invoice as it would look printed out.
- **Print Invoice**: Prints the invoice out. This option is the same as View Invoice except that it takes you to the Print page automatically.
- **Email Invoice**: Emails the invoice in HTML format to the default email address supplied in the **Bill To** section, or to any email address you want.
- **Pay Now**: Enter the payment into the system or process your payment by credit card.
- **Print Tag**: Prints out the item service tag without any monetary information and takes you to the Print page automatically. This is useful for computer stores that tag each computer with customer data. It is also useful for tracking complaints and their complaint status. When choosing to print an invoice or view an invoice the following screen will be displayed.



Item Service Tag

| | | | |
|---|---|---|---|
| **Date:** | 2011-05-15 22:43:08 | **Form Type** | Invoice |
| **Appointment Date:** | 05-15-2011 | **Appointment Time:** | 00:00:00 |
| **Invoice #** | 89655971 | **Customer ID:** | 0 |
| **Service To:** | POS Customer | **Service Address:** | , |
| **Phone Number:** | | **Cell:** | |
| **Work Phone:** | | **Fax:** | |
| **Email Address:** | | **Tech Assigned** | demo |
| **Complaint/Work Needed:** | | **Notes:** | Created By demo on 05-15-2011 10:42 PM POS #617 -> Invoice by demo on 05-15-2011 10:43 PM |
| **Invoice Comments:** | | **Item(s) Serviced:** | |
| **Service Completed** | | | |

| # | Item | Quantity |
|---|---|---|
| 1 | Triangles | 1 |

**There are 0 Checklist Items In Invoice# 89655971** All Groups Select Group

*Print Tag Page*

- **Attachments**: Insert attachments and view attached files.
- Create a New Invoice, and import customer data from the current invoice instead of importing from the Customer Directory. This is useful when wanting to make slight changes to the customer info and not have it affect the default settings in the customer directory.
- Print Page: Just prints out the current page including all data.

The logo in between can easily be changed by going into the directory which Web Invoice was installed to, going into the settings directory and copying a jpg file called **main.jpg** or replacing it. Let's say it was installed into the default location of **c:\www\webinvoice**. You'd need to enter **c:\www\webinvoice\settings**, and replace the file main.jpg**.**

The reason why the file name would be main.jpg is because that is the name of your profile when web invoice is first installed. If you create another profile and name is number2, then the name of the 2nd logo would be number2.jpg.

There are also features such as synchronizing all invoices with customers. This means, if you update an invoice with user information such as a change in price or address, you can sync that with that customer in the customer directory in order to keep that info as default. Also, you can export your customer directory to CSV file, and add/remove fields in the customer list as well as other lists.

After creating the Invoice you'll see this screen appear:

This indicates that you've successfully entered data into and created an invoice. You now have the option to insert parts or specific labor (Besides the labor option you had on the previous page). Specific Labor is geared towards having one labor per price. This is specific to each job. For example, labor can be inserted into the previous page under work completed, and you can set flat rate or hourly rate. However, this area allows you to add as much labor as you want in only one section, which for an hourly rate is great because you can do multiple jobs and charge hourly for all of the work. But if you require each type of work have a separate price, then specific labor is the option you'd want to use. You can insert a Specific labor from a drop down of preset labor, which was discussed earlier. Or you can manually insert your own labor with the price. In this area, you can also insert Parts/Items. Separately from labor, or together. For example:

the part will be : light bulb, $10
the labor will be Installed light bulb $25
In this page, you'll notice there are other options including, the ability to view the invoice so far, or edit again, or print the invoice, or enter money to pay for the invoice in "Pay Now"
Clicking Yes to: "Do you want to add specific parts and labor?"
will bring you to this section
Here you'll have many options.
Add/Search : Allows you to add items or search inventory for them
Print Invoice: Allows you to print the invoice from here
New Invoice: Allows you to create a new invoice from here, saving time
Tax Exempt: Disables taxes from being charged
You can enter the quantity of the item you want to insert, and use a upc barcode scanner to scan in that item for direct fast item insertion (good for stores)
You can copy all items from an exiting invoice, which is a big time saver , or you can pull items from a template which is also great if you have recurring invoices.
The Template feature actually works in 2 directions.
You can either pull from the template, which I've just discussed, or , you can go to the template area which is located on the main start page, and create a whole invoice to a customer from the drop down menu.
You can also Pay out the invoice from this area too.
In order to insert items you have 2 options.
1.) Insert directly from UPC scanner, which will require the inventory module enabled.
2.) Click on Add/Search which will bring you to the following screen.
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There are 2 Options within this option.
1.)Pull From Inventory List if Inventory Module is Enabled
2.)Insert Manually with out the use of Inventory
After Clicking on option #1 you'll see the Following:
This allows you to select
the quantity wanted per
item, and also displays
quantity on-hand,
quantity after

Appointments and
Estimates are converted
into Invoices. And other
info including Labor.
If you’d notice, on the last item, the price indicates 234.00(1)
This means, there’s 1 personal price for that item. Meaning, any customer can be tied to a personal price just for them.
20
Editing Data using Shortcuts:
On the details page of an invoice you’ll see many words in blue.
This indicates that they are html links and they are actually shortcuts to editing and inserting data, instead of click on the “Edit Data” button on the top left.
1.) Email Address: Simply Click on the Customer’s Email Address and you’ll get a popup window allowing you to email the Customer. This is also true in the List view of the Email Field.
2.) After where it says “Bill To:” there’s a short cut to create a new entry
This creates a new invoice, pulling data from the person billed, and not the actually customer
3.) where it says “Parts and Labor” You can click on that or the actual price, and it’ll pop up a screen where you can add more parts and labor into, which will refresh your current view to be in sync with what ever you insert or delete.
4.) Where is says Total Due: click on the price and it’ll pop up a window which will allow you to enter the amount paid.
5.) Where it says Service Completed: A window will pop up after clicking, allowing you to add Labor which is billable by the hour or flat rate. It’ll also allow you to close the invoice.
6.) Work order, prints out a work order, similar to an Invoice but without any pricing
7) Checklist: allows you to modify the check list, add or remove items by pulling them from the Master check list which can be managed in the “options” page or you can create your own check list item
Click on the (X or Check) to change status of each item.
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Applying Payment to a Balance Due
In order to View Invoices with a balance due, go to the main page -> Open Invoices and click on the text within the box stating the amount of invoices with a balance.
The picture below shows what will be displayed
As with the page before, clicking on the amount due (Balance) will allow you to enter a payment. It is the same as clicking on it within the details page as shown above.
After clicking on the Balance, a pop up Window will appear where you can enter the amount being paid along with the date, payment type and who the money is actually in possession of.
This will be useful when you want to determine whether you owe your worker, or your worker owes you if he is in possession of the money.
If there is more than one invoice with the same Billing ID having a balance, you’ll be able to choose whether or not you want the money should pay for only this invoice or all invoices before this one and including the current invoice.

This is useful if there are many outstanding invoices being paid at once, Saving Time.
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Using Edit Data
In some cases, it is important to use the “Edit Data” Option, instead of a shortcut.
Using “Edit Data” you can alter the invoice in various ways.
1.) You can change Appointment Date or Time, Change Assigned Technician, change a “Referred By” Customer, Change service call to an In-House job, and pay out amounts owed to your referrer or your technician.
2.) You can change Customer and Billing Person’s Data, or change “Service To:” To which ever wording you’d like to display on the Invoice.
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3.)
A.)You can give Discounts, in Currency amounts, or in Percentage, or Choose from a Preset discount which has already been configured, within the options section.
B.)You can change Hourly Rates and time spent, or change billing to Flat Rate.
There’s the option to Change Invoice status from “In Progress” to “Work Completed”.
C.)You can also Apply Payments here, but it is highly recommended to do so in the details page shortcut because it will Document when the payment had been applied.
D.)You can change currency of the Invoice.
E.)Change who the money was collected by.(This will determine who owes who money when a job is done. Either the Employer owing the Tech, or the Tech owing the Employer)
4.) Option of Changing the Complaint/Work needed, Items left for service, Items serviced, Invoice Comments, Notes, and Work Completed.
24
Converting an Appointment or Estimate to an Invoice
Once an Appointment or an estimate has been Created, and Viewed or Printed, You’d eventually want to create and Invoice to Follow Through.
This is a typical Details page of an Appointment or Estimate.
Simply click on “Convert-2-Invoice”, and all the data from this Appointment will be transferred to a New Invoice, including all parts and labor. This appointment will then be deleted along with all parts. Leaving the New invoice.
The process of Conversion can be done before all work is done or after work has been completed with all parts, it doesn’t make a difference.
Converting an Estimate is exactly the same.
Converting an Appointment to an Estimate or Vice Versa
Click “Edit Data” and Change Form type to Estimate or Appointment.
25
Viewing Completed Invoices
In order to View Completed invoice, Click on the bottom left button which says “View Invoices” in the box which says “Completed Invoice”.
Make sure you Enter the correct date Span. If you are unsure when the invoice was last created and completed, you can always set the “FromYear” to nothing.
For example, You can View all Invoices from 01-01 till 10-04-2008.
This will allow you to View all closed Invoices from the First Invoice Ever Created till the End Year Date.

As you can see, there's a small red "p" on the left side of the invoice number.
This indicates that the invoice has been paid for In-Full.
This will only show up when viewing completed invoices. This distinguishes a paid invoice from an unpaid invoice which is also completed.
26
Searching within an Invoice
If you do not want to View all invoices, but you'd like to search for specific data within an Invoice, first, click View Invoices Once again, and you'll be brought to the Invoices Page.
On top you'll notice that the search form has now changed from the Default search form which is the search for within the customer directory, to the Search form for Closed Invoices.
This Search form includes another Vital Piece of Data which is the Date.
It is Important that the date is entered when searching, or else, it'll only search for the invoice within the current year.
As you can see, the Search drop down box allows you to search for many different type of Data.
27
Creating and Using Templates
What is a Template?
A template is Similar to an appointment or estimate in internal structure, except, it is known to the system as a template.
A Template allows you to create an "Entity" without any customer data within the entity.
This allows you to make a generic type of invoice, insert all work completed including time and (Parts & Labor) and then later attach it to a customer.
Why is it useful?
Let's say the invoice which you create for someone happens to always be the same more or less, and there are 50 parts and labor entries.
You wouldn't want to create that from scratch each time you make that invoice for your customer.
The Template system allows you to create it once and save it.
Then later on, go to the template system and pull from a list of customers, and create a new invoice using the parts and labor of that template, and merge it with your customer.
Let's see how it works.
Click on templates on the bottom right
Below is the list of already create Templates.
You can either Create a Template by going to the left index list, and click "New Template"
Or go to templates on the bottom right of the main screen and click on "New template" there.
The screen Below Displays the forms used to create a New Template.
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Simply enter is rate information, and labor.
After doing so, you'll be asked to enter parts and labor just like when creating a new Invoice.
Below is the list of templates that have already been created

In order to map a template to a NEW Invoice. Click on the template Number on the left.
As you can see, all the Invoice data is supplied in the template, except there isn't any Customer Data.
Simply click on the drop down arrow on top, and a list of customers will be displayed, Choose the customer, and Click "GO". And that's it !
29
A 2nd way of using Templates.
You can also create an Invoice normally, and when you get to the parts and labor section of inserting Parts, you'll see right above the Parts & Labor list, there's a drop down menu Where it says "Copy Items From Customer's Previous Invoice".
This allows you to copy items from previous invoices, which is a similar Idea to Templates.
You can also copy Items from a Template. Which is Very similar to creating an Invoice from the template Manager directly, but it's in the opposite direction.
Instead of pushing template items from the template Manager and creating an invoice, you're pulling template items into your already created Invoice.
You can Also Display and Print Invoices from within this page.
The checkbox on the top right which says "Tax Exempt" disables all taxes from being inserted.
The 2nd checkbox on the lower level, which says "Exact" will copy the Items from any previous Invoice, and not change the price of any item, which is in accordance to any new prices set within Inventory, if any item from that invoice was pulled from inventory.
30
Creating and Using Discounts and Preset Discounts
There are 2 ways to give Discounts.
1.) Create a Discount for labor which is (Hourly Rate or Flat Rate) or Create a Discount for all Parts (Items) and specific labor.
For example, you might have worked for 5 hours, and the total bill is for $150.00
You can discount that by giving a Percentage Discount, or give a Currency amount discount. For example, 20% or $20.
Or, let's say you have 10 items in the Parts and Specific labor list,
You can give a 20% discount on the total price of all those items together.
2.) Create a Discount on Each Part (Item) Separately.
This allows you to Discount each item with a separate discount Percentage or separate discount currency amount.
For example, give 10% discount on labor and 2% discount on network cable.
Notice, you also have the option to select a Preset Discount for Labor.
The preset discount is setup in the Options Page.
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Customizations
There are a few Places in which you will have the option to customize the appearance and operation of Web Invoice.
1.) Customizing the Invoice Logo: You can customize the Invoice logo, by replacing the file called main.jpg or the 'profile name.jpg' with the jpg file of your own.
Try keeping the size down to 140 x 90 pixels.
The logo File is Located in the webinvoice/settings directory.

2.) Customizing the Look of the Invoice itself.
You can Modify or recreate the upper half of the invoice by editing the file called invoiceface.txt. This file is also located in webinvoice/settings.
The file contains, html and php code, with a reference to what each PHP variable is assigned to.
3.) Customizing the amount of fields in the customer directory list, Invoice list, and Service Request list. Below is the option bar which contains many options.
Click on the the Wheel on the left of the Customer count (184),
And a popup will appear giving you the option to Add or remove fields.
Below is the popup Window
4.) Customizing the Login Page: You can customize the login page by editing the index.htm file which is also located in webinvoice/settings/index.htm