EasyBilling Software

EasyBilling is a comprehensive sales document management program. It provides a feature-rich environment that allows user to prepare different kinds of sales document, include Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Credit Note and Debit Note. User can easily export the document into different formats.

EasyBilling User Guide

Prepared by EasyBilling Development Team
Last modified: 01/20/2022

Table of Contents

1. SYSTEM REQUIREMENTS

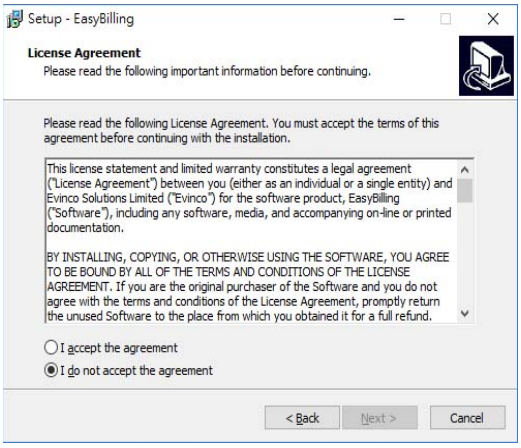
- Operating System:

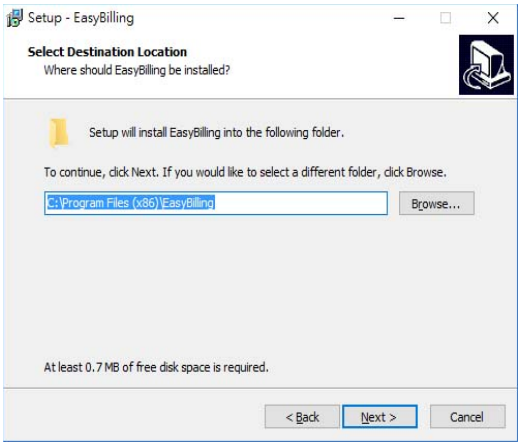
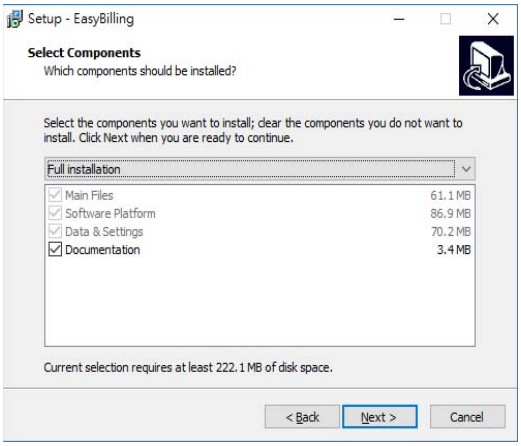
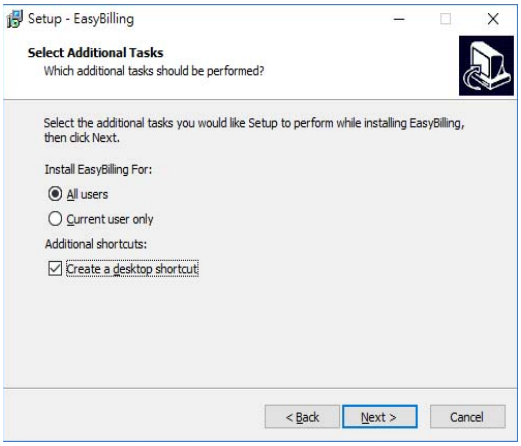
  Microsoft Windows 11, 10, 8.1, 8, 7

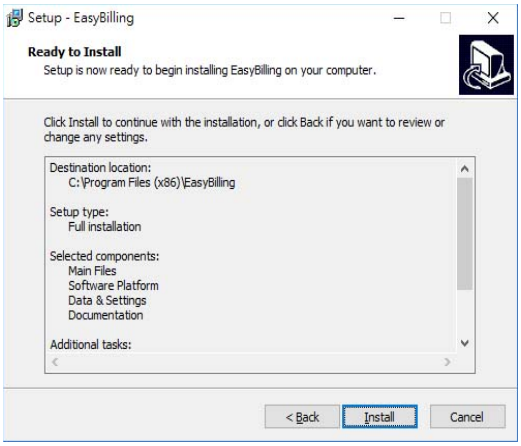
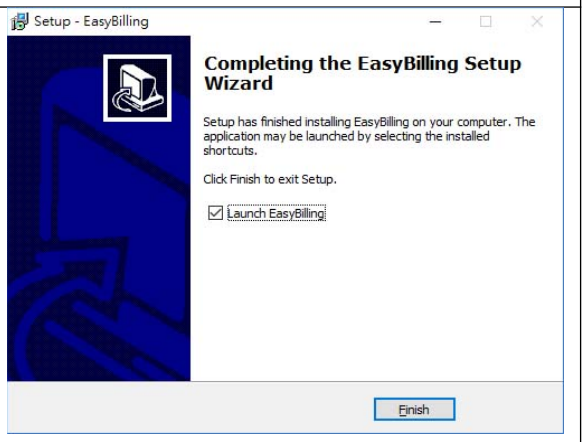
  Mac OSX 10.12 or later

2. INSTALLATION FOR WINDOWS

2.1. Install

1. Installation Welcome Screen.	
2. Specify accept the license agreement or not.	

3. Select the destination location.	
4. Select the components to be installed.	
5. Specify installation for all user or current user, and create Desktop Icon.	

6. Start the installation.	
7. Installation Finish.	

2.2. Uninstall

To uninstall EasyBilling,

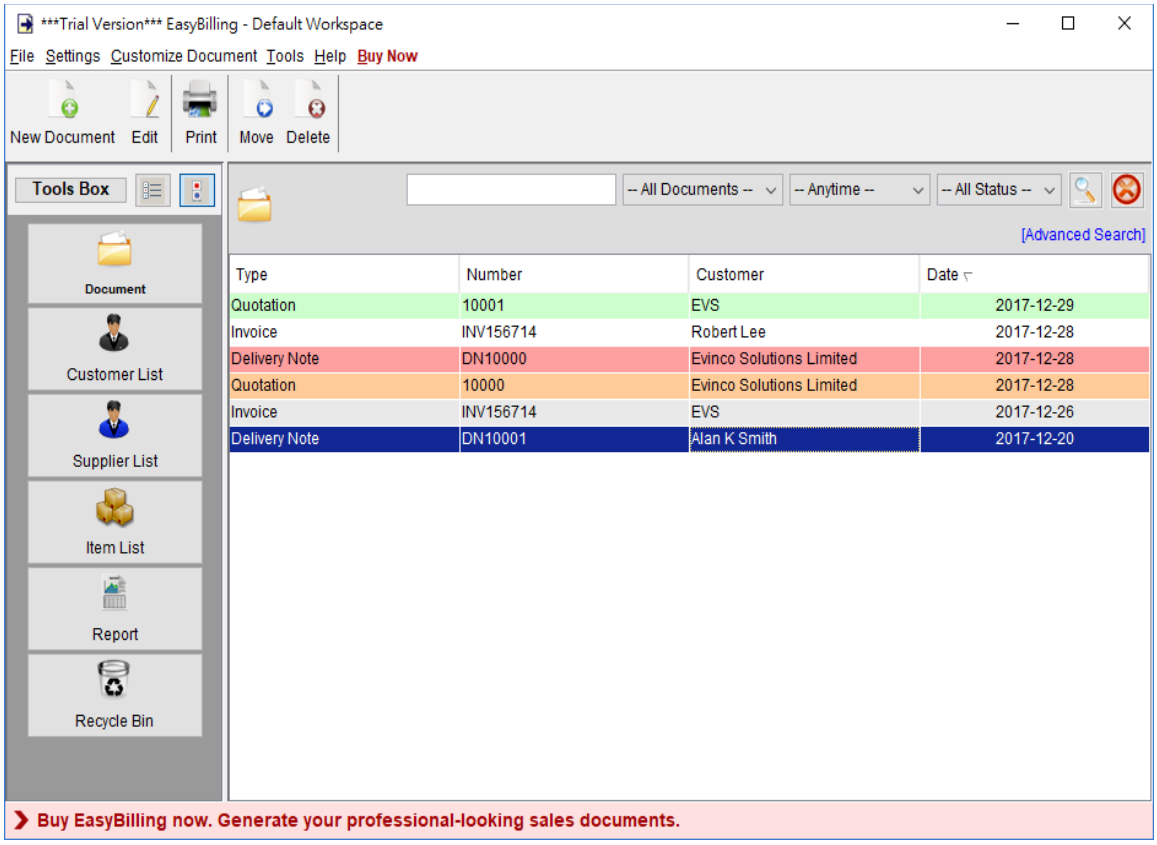
1. If you're using EasyBilling, quit it.

2. Click Start, point to “Program Files > EasyBilling”.

3. Click “Uninstall EasyBilling”.

4. Follow the on-screen instructions. EasyBilling will be uninstalled

3. USING EASYBILLING



The main screen of EasyBilling is shown above.

In the top is the menu bar, which has five options, File, Tools, Settings, Customize Document, Help and Order Now. "Order Now" is shown in Trial Version only.

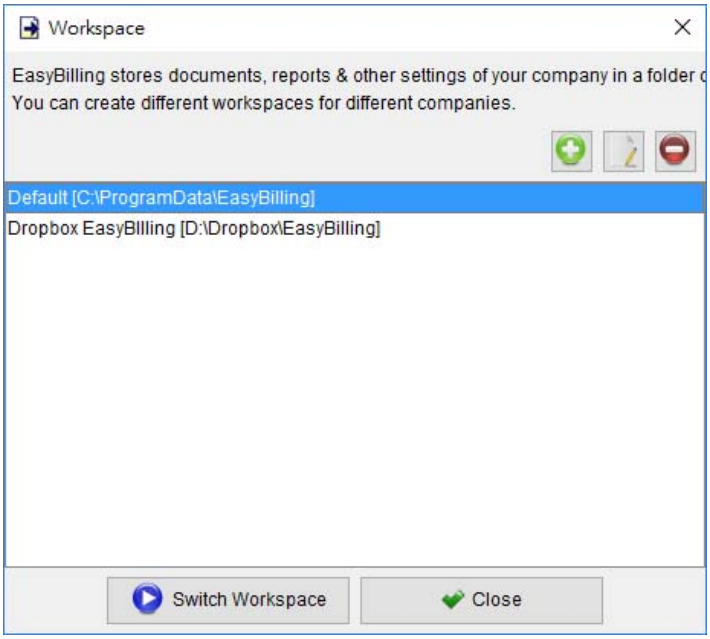
The next is the tool bar, which provides a quick access to some commonly used functions. The tool bar will varies depends on the Function Panel shown.

The Tool Box on the left allows you to switch between different Function Panels. There are four “Function Panel”; they are Document, Customer, Supplier, Item, and Report.

The Function Panel will show on the large area. The components are listed in tabular format. User can highlighted the components and right-click on it to show the popup menu. The popup menu provides further function for the components.

3.1. Workspace

EasyBilling stores documents, reports and settings of your company in a single folder, called workspace. You can create different workspaces for different companies. To manage your workspace, simply click menu “File > Switch Workspace”.



The first workspace in EasyBilling is named as Default. You can click [+] button to add workspace. To switch other workspace, simply highlight the workspace and click “Switch Workspace” button.

3.2. Connect and Share same Database from different EasyBilling

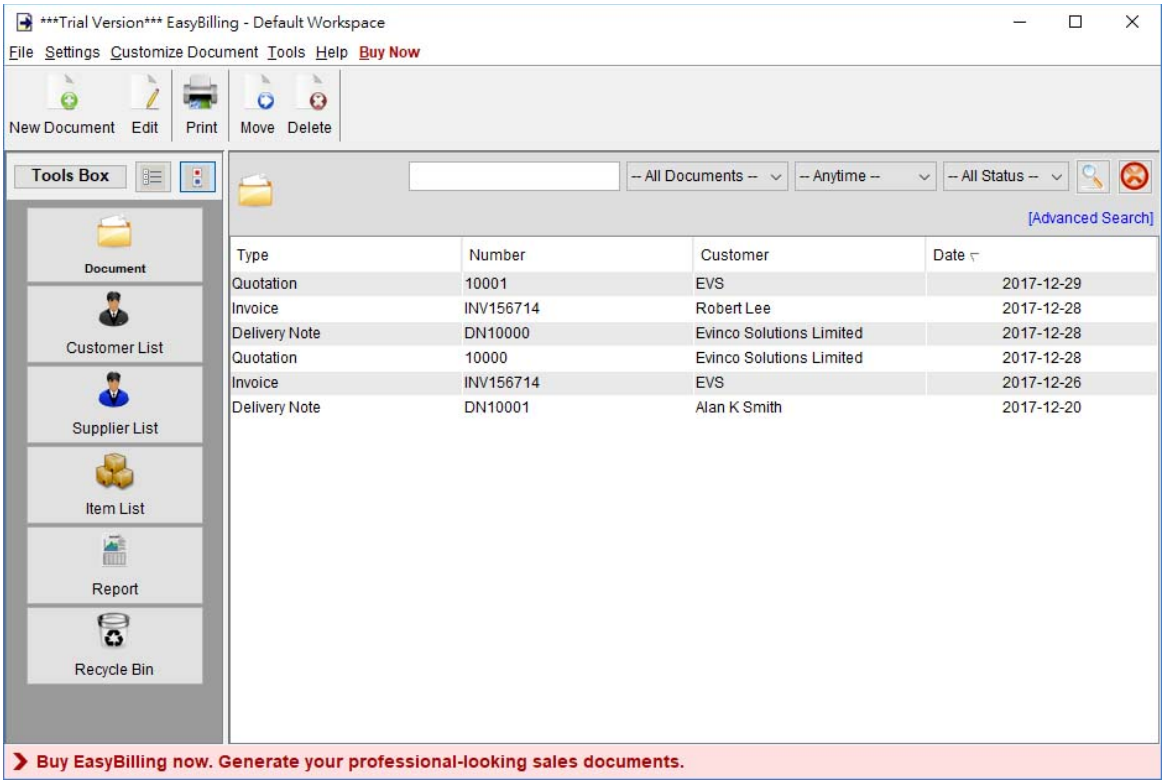
EasyBilling is a standalone application, and does not have network/multi-user access features.

However, you can set the Data Folder (workspace) to a network drive/shared folder, so that EasyBilling from different computers can access the same database.

In EasyBilling, you can set your workspace in menu "File > Switch Workspace" and create a new workspace in a network drive or shared folder. In another computer, you can set the EasyBilling to use the same workspace folder but choose "Connect existing workspace". The two EasyBilling will connect and share the same database then.

Different EasyBilling cannot access the workspace at the same time. As the database is locked when EasyBilling is running, EasyBilling in other computers can only connect the same workspace in READ-ONLY mode.

4. DOCUMENT



The user interface for managing Documents is shown above.

The icons in the Tool Bar are "New", "Edit", "Move" and "Delete".

New – Create a new document: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Credit Note and Debit Note.

Edit – Edit selected document.

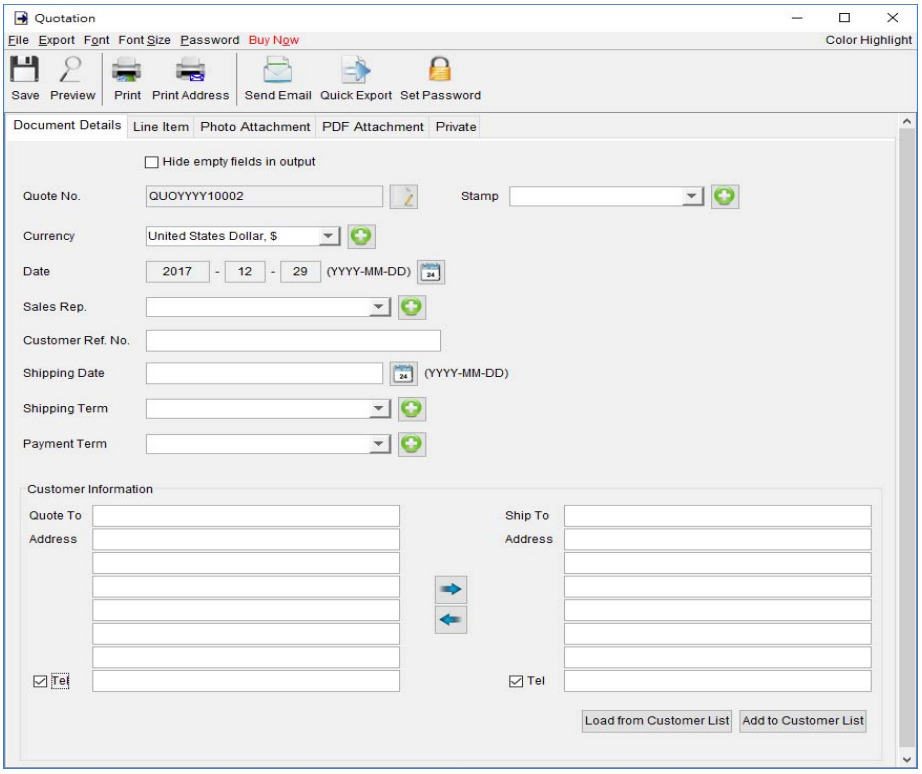
Print – Print selected document.

Move – Move selected document into another folder.

Delete – Delete selected document.

Documents are listed in tabular format. User can click on the header to sort the documents accordingly.

4.1. Quotation



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

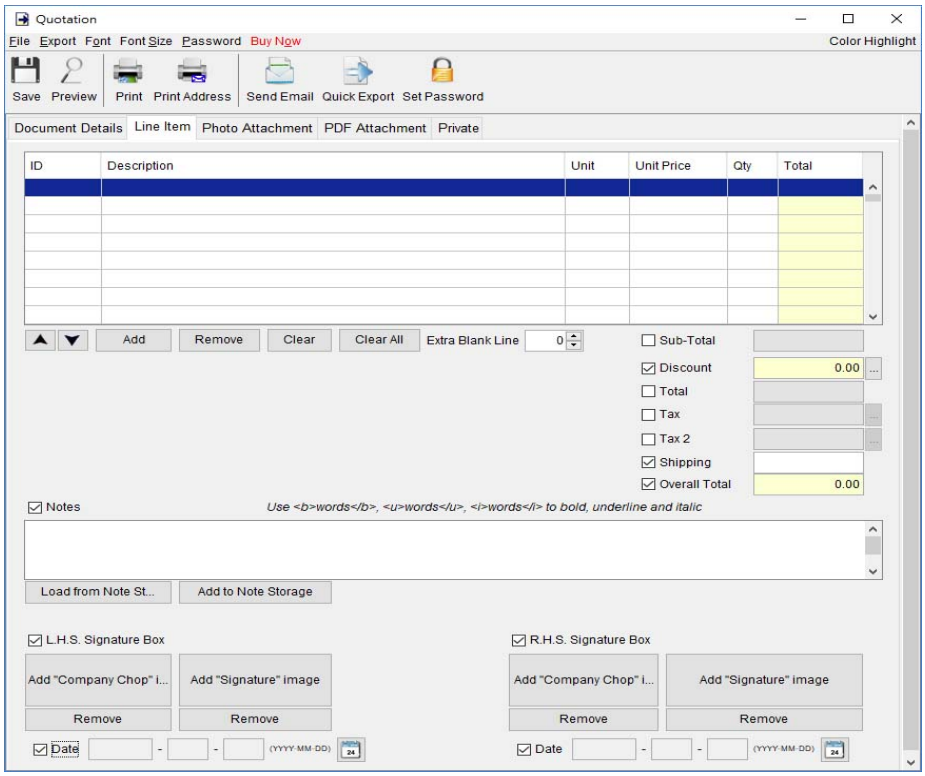
<u>Quotation Details</u>

There are five parts in Quotation:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Quotation, includes Quotation Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document, such as Confidential, Revised, Draft, etc.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before "Sub-Total", "Discount", "Shipping", and "Tax" field is to indicate whether the field will be shown out in the output document.

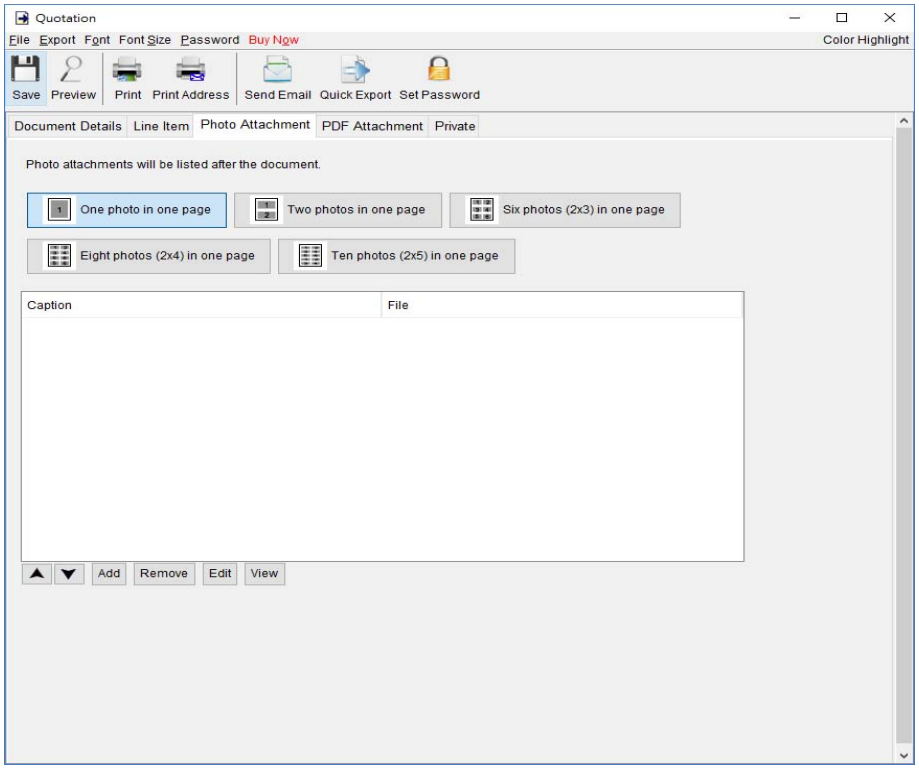
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

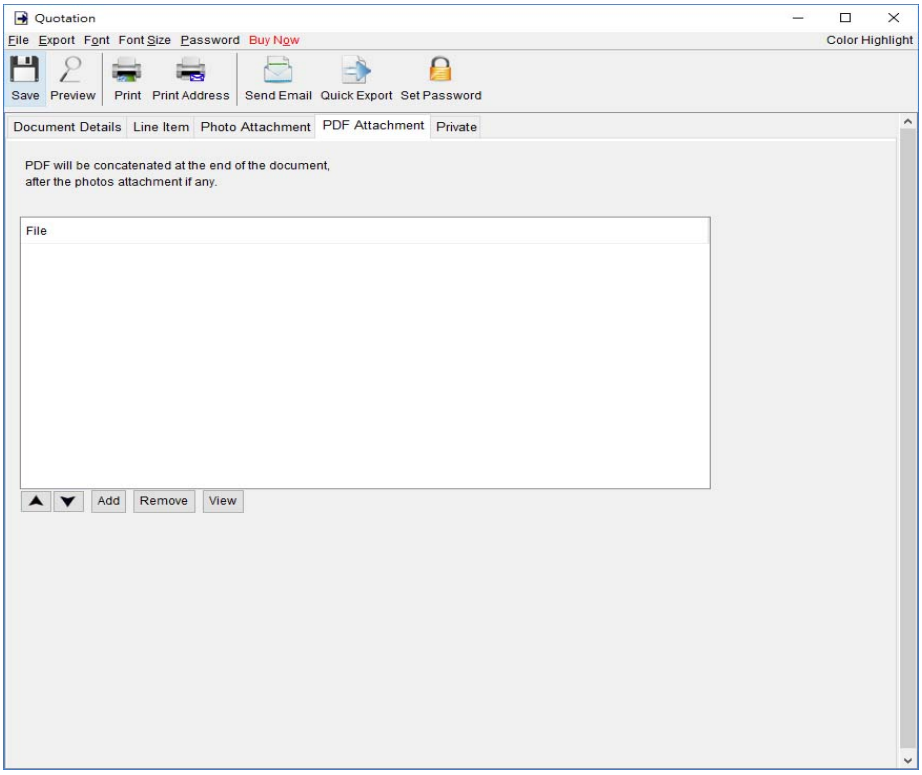
Photo Attachment – Photos can be attached to the end of quotation. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

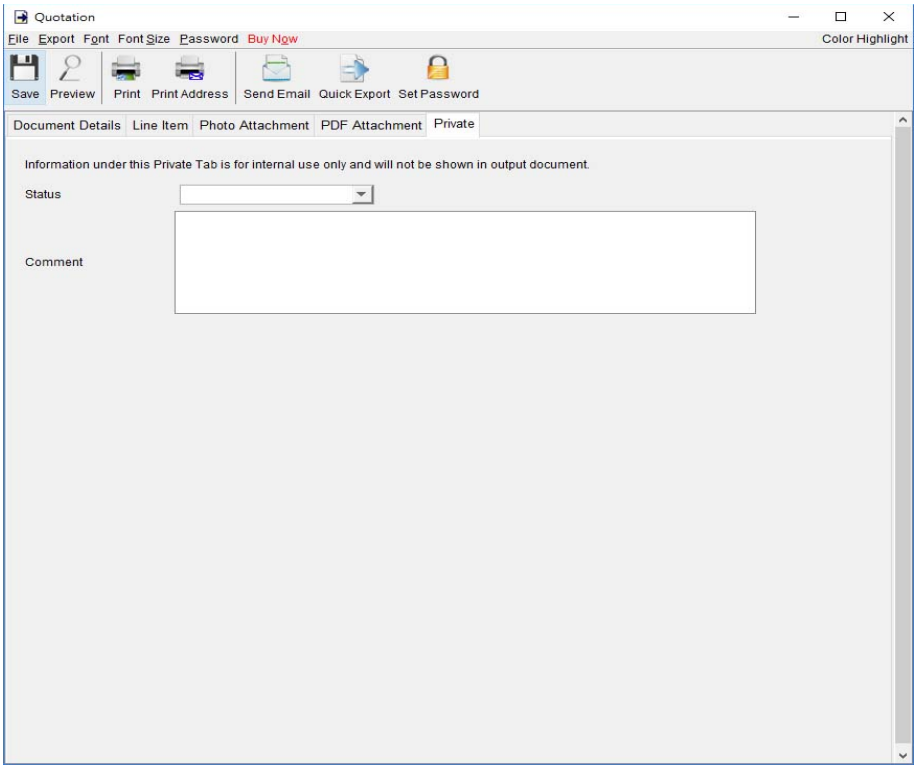
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



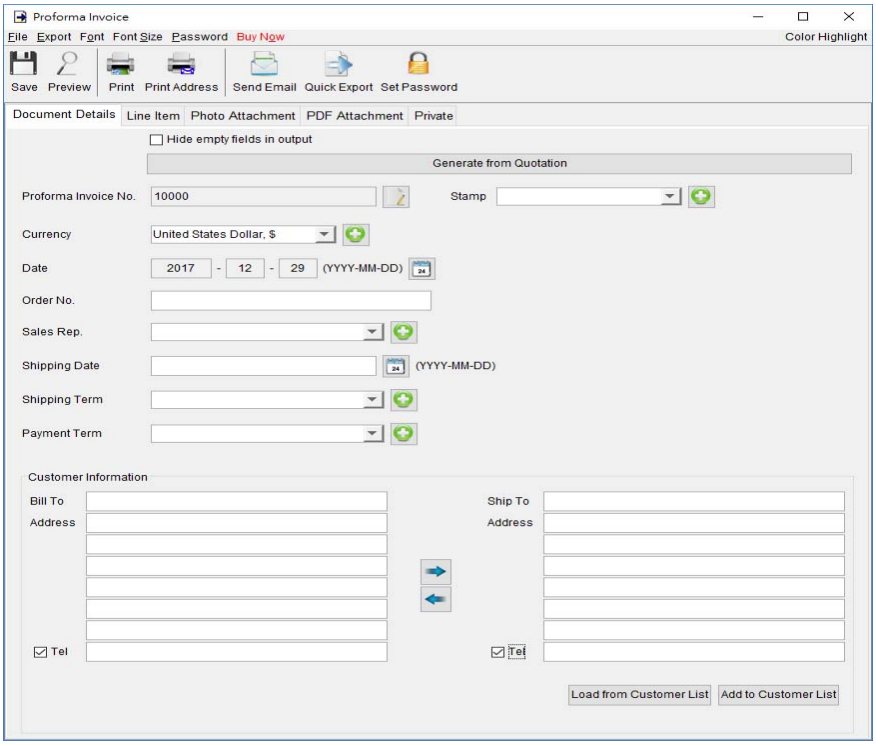
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.2. Proforma Invoice



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File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

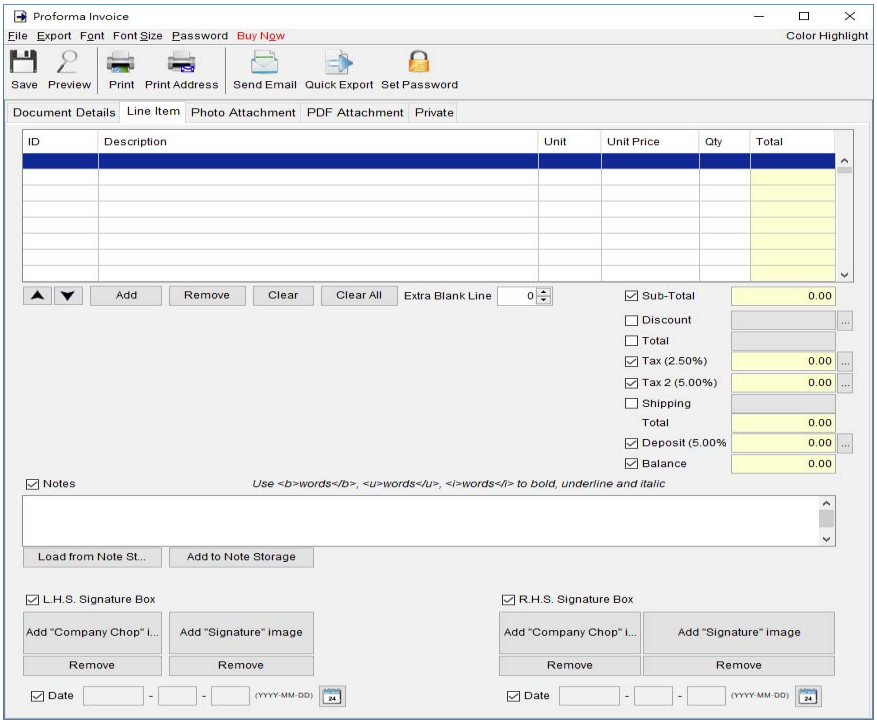
<u>Proforma Invoice Details</u>

There are five parts in Proforma Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Proforma Invoice, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document, such as Confidential, Revised, Draft, etc.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before "Sub-Total", "Discount", "Shipping", and "Tax" field is to indicate whether this field will be shown out in the output document.

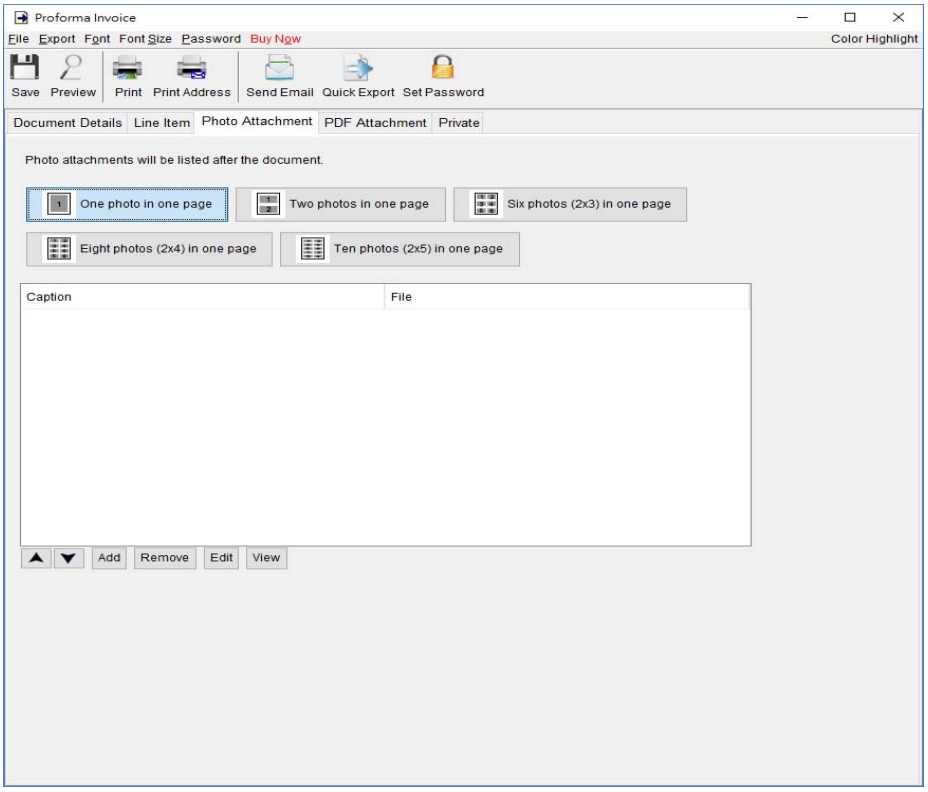
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

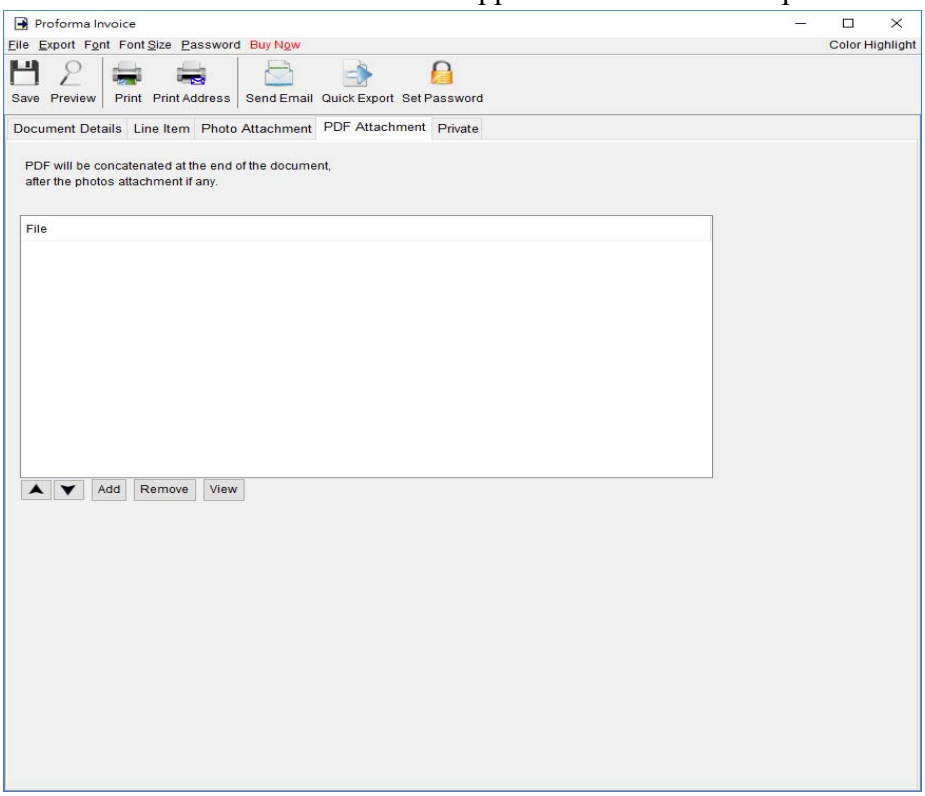
Photo Attachment – Photos can be attached to the end of Proforma Invoice. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

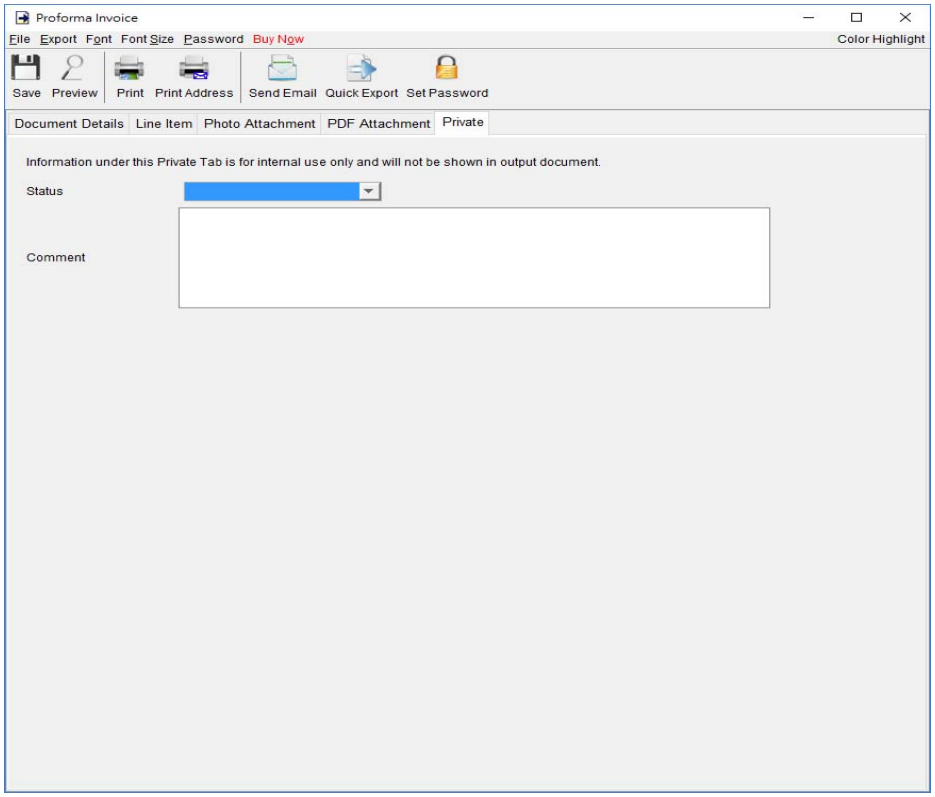
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



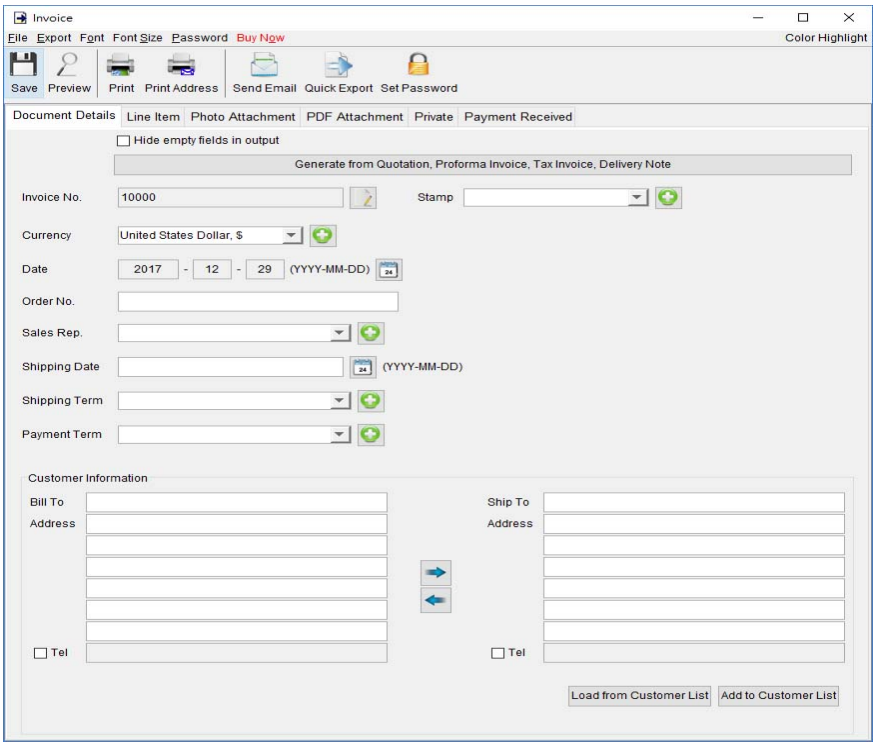
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.3. Invoice



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Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

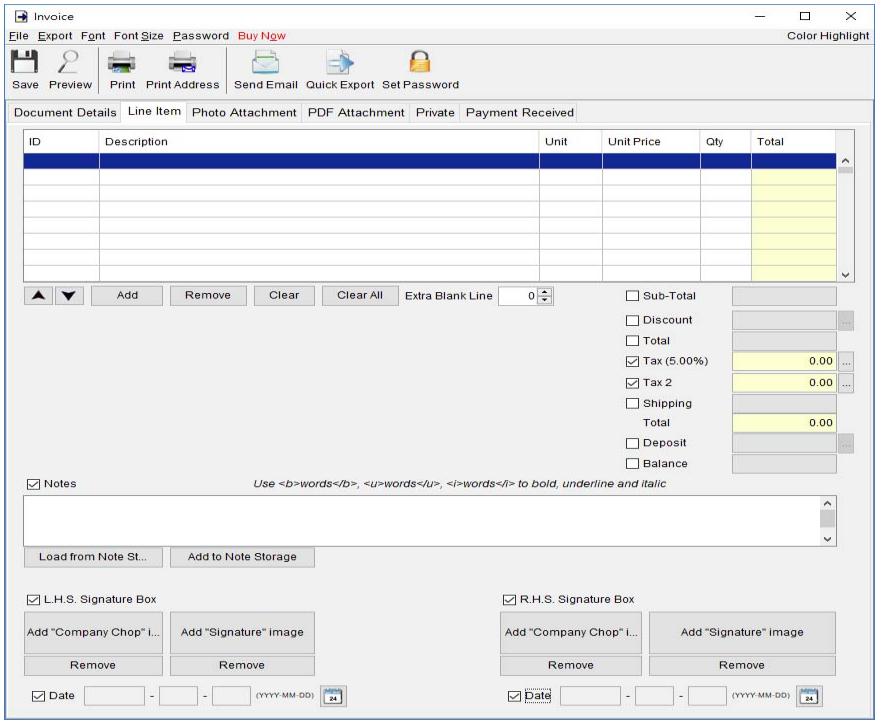
<u>Invoice Details</u>

There are six parts in Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private
- Payment Received

Document Details – User can specify the header information, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.
Invoice can also be generated from Quotation, Proforma Invoice, Tax Invoice or Delivery Note. The data in selected document will be copied to the Invoice.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before "Sub-Total", "Discount", "Shipping", and "Tax" field is to indicate whether this cell will be shown out in the output document.

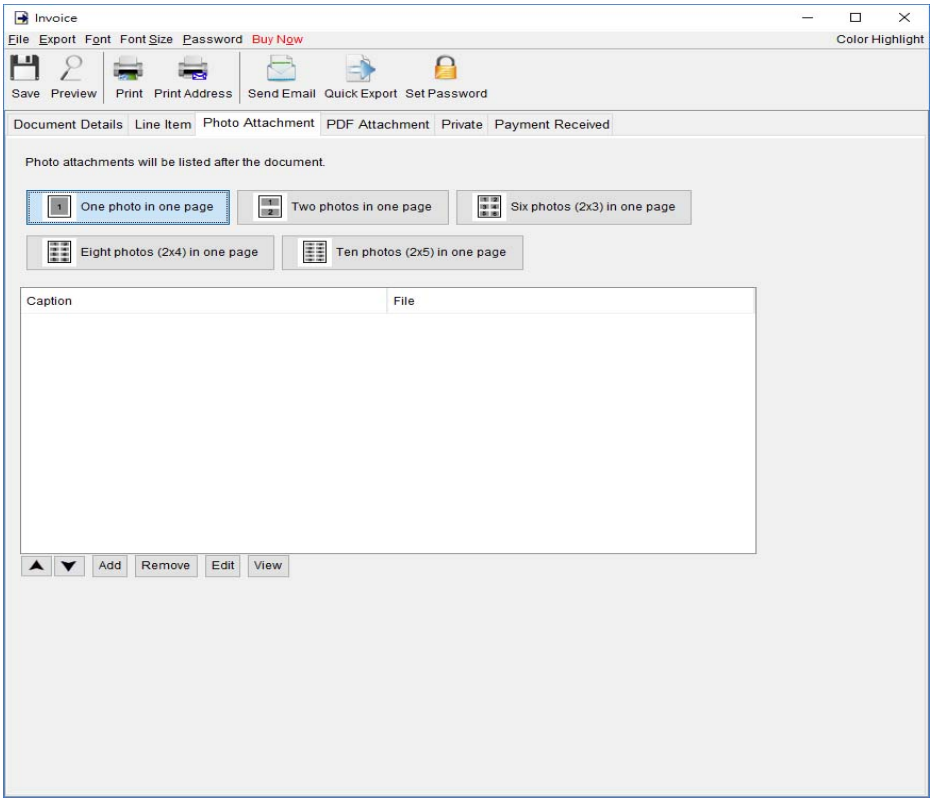
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

Photo Attachment – Photos can be attached to the end of Invoice. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



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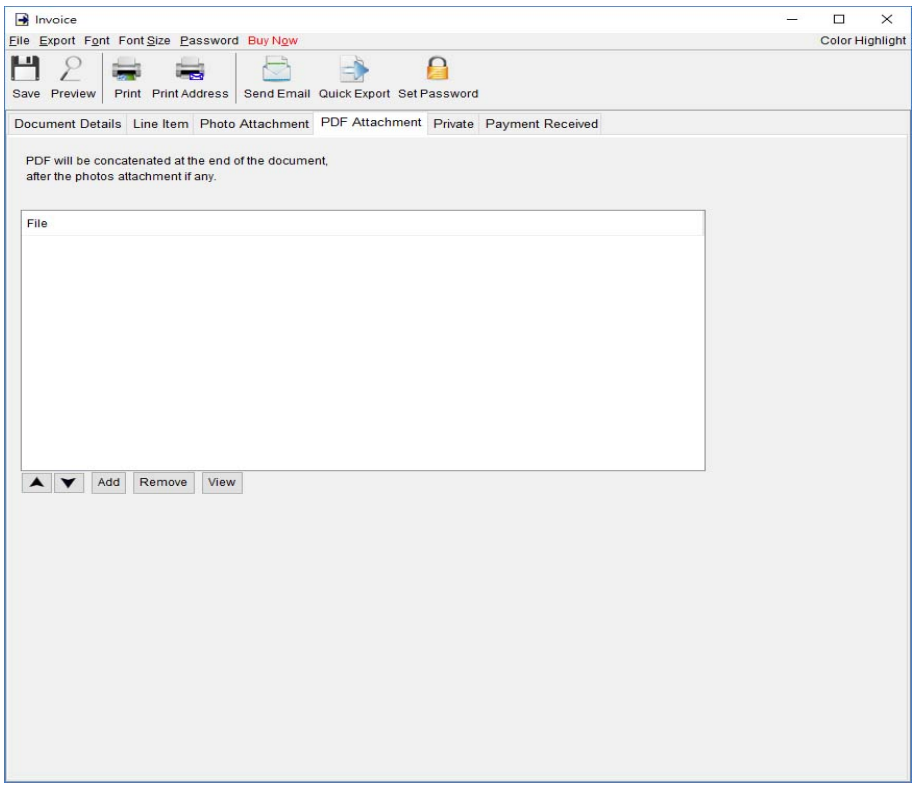

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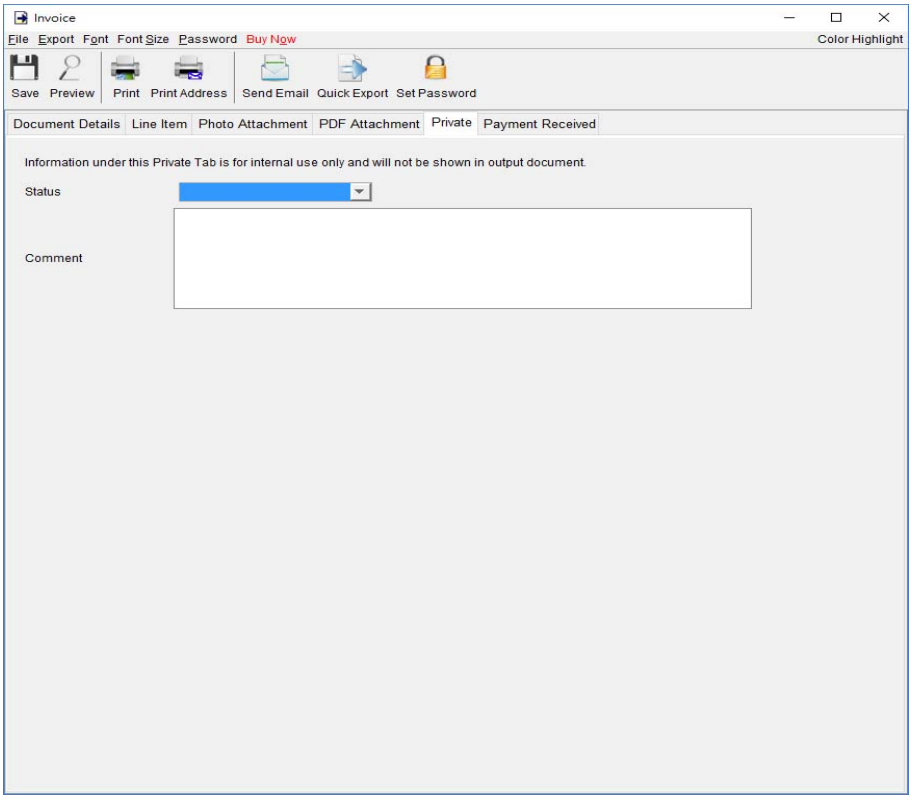
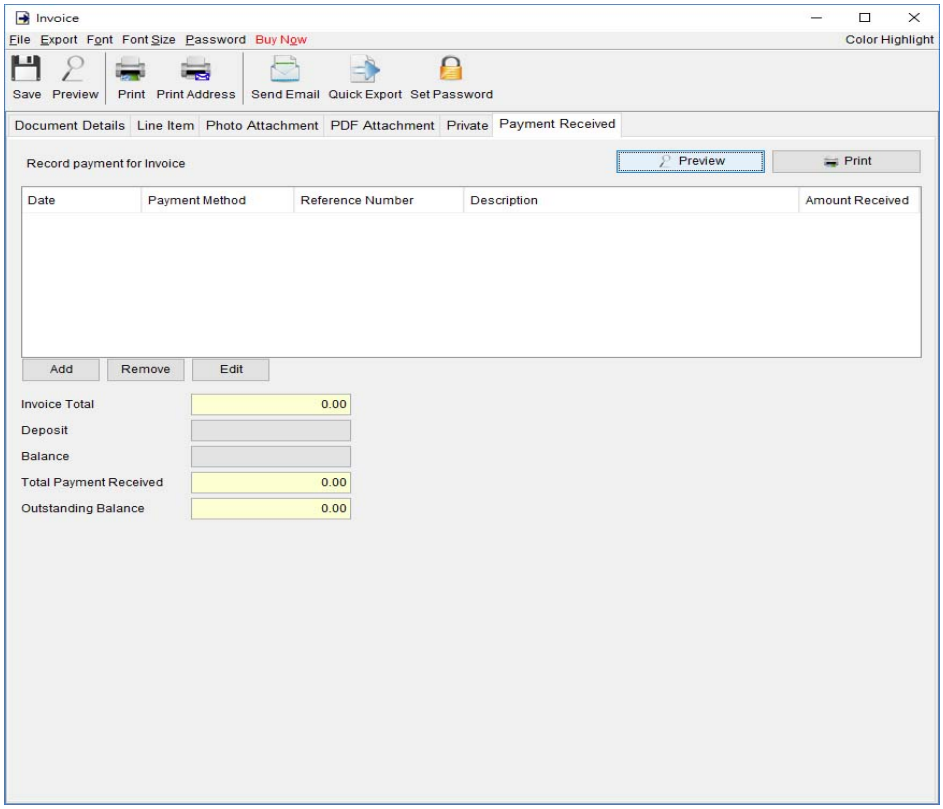
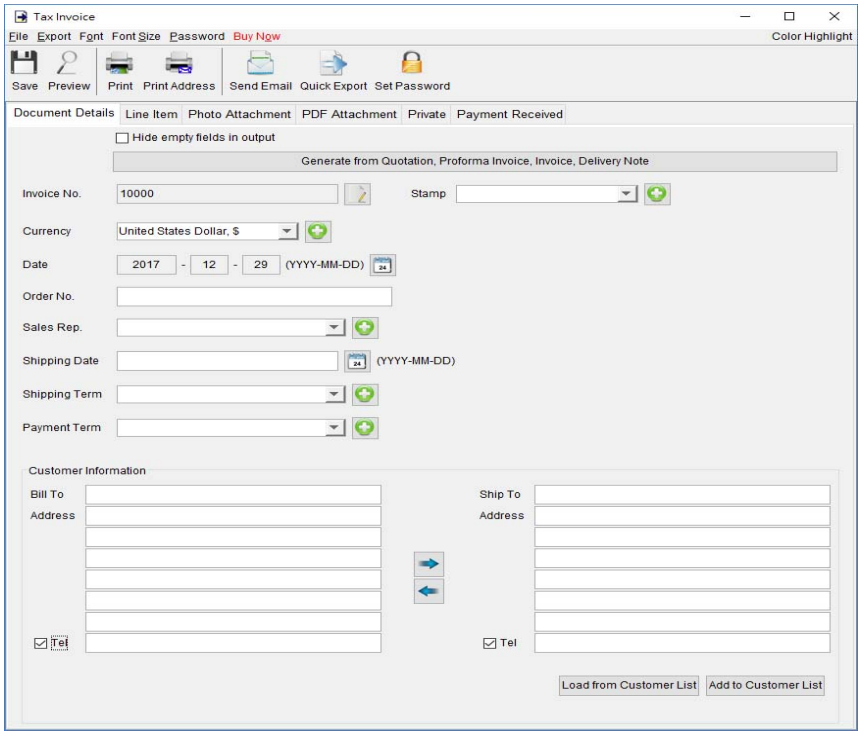


Payment Received – This tab is to record the payment received for the invoice. Click [Add] button add a record for the payment. User can provide date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The payment received record can be previewed or printed out by clicking [Preview] or [Print] button at the top right corner.



4.4. Tax Invoice



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Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

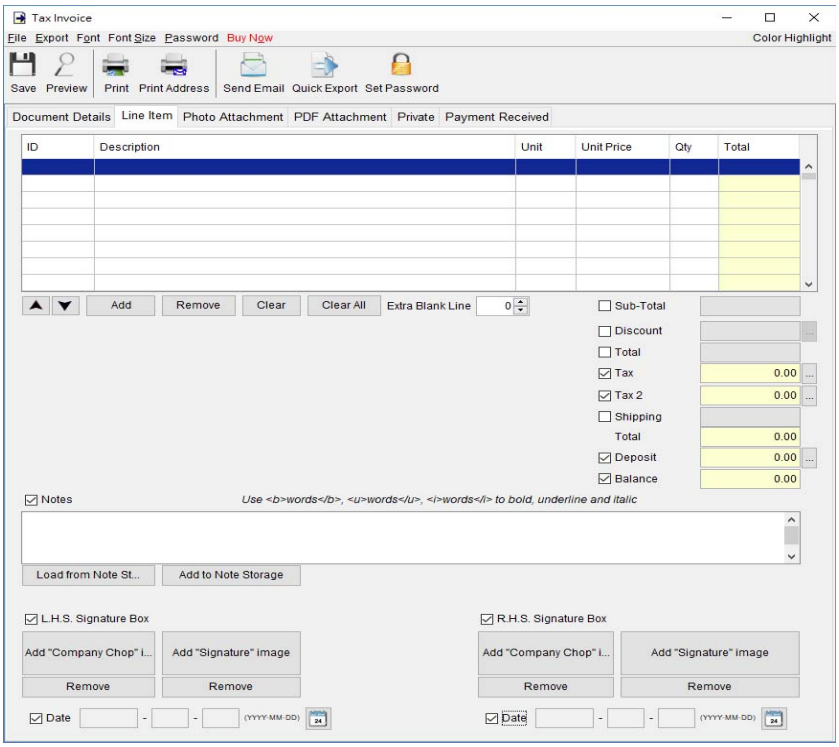
<u>Tax Invoice Details</u>

There are six parts in Tax Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private
- Payment Received

Document Details – User can specify the header information, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.
Tax Invoice can also be generated from Quotation, Proforma Invoice, Invoice or Delivery Note. The data in selected document will be copied to the Tax Invoice.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before "Sub-Total", "Discount", "Shipping", and "Tax" field is to indicate whether this cell will be shown out in the output document.

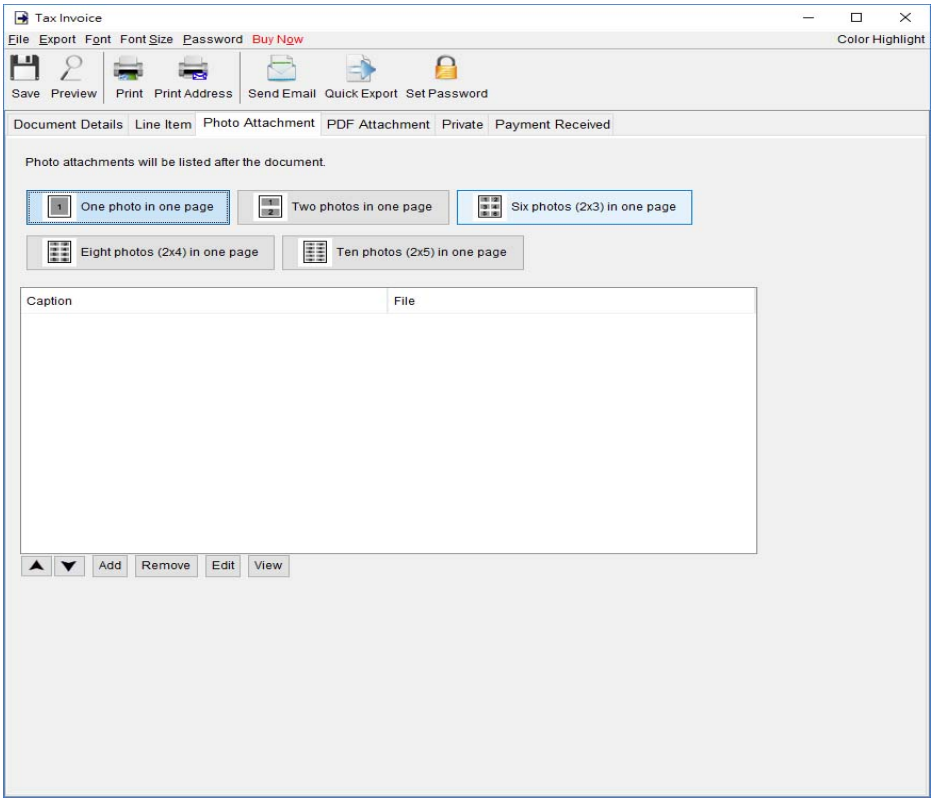
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

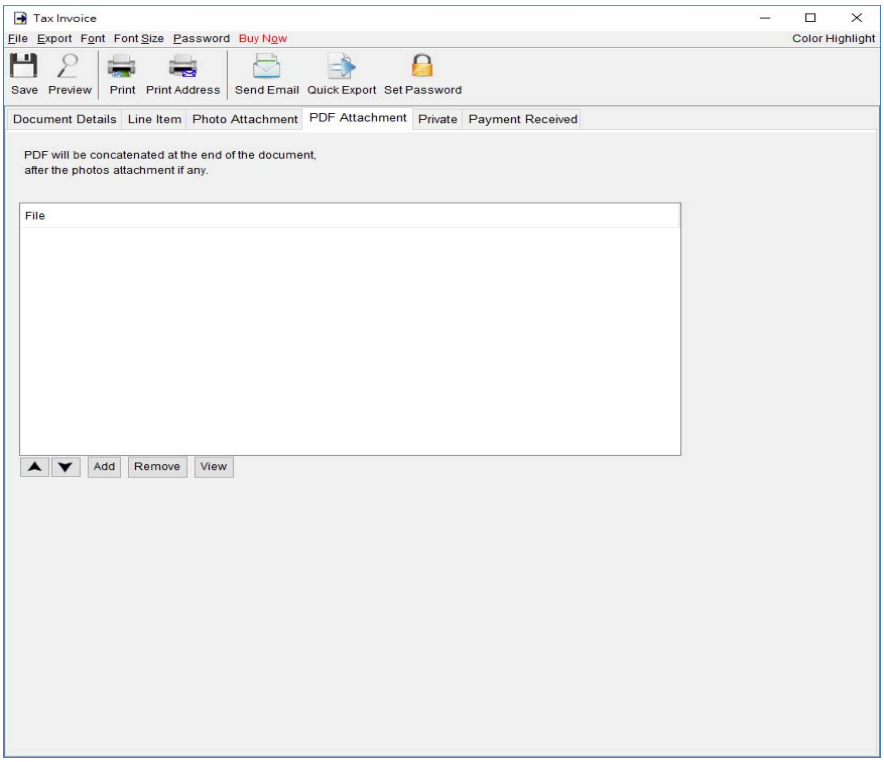
Photo Attachment – Photos can be attached to the end of Tax Invoice. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



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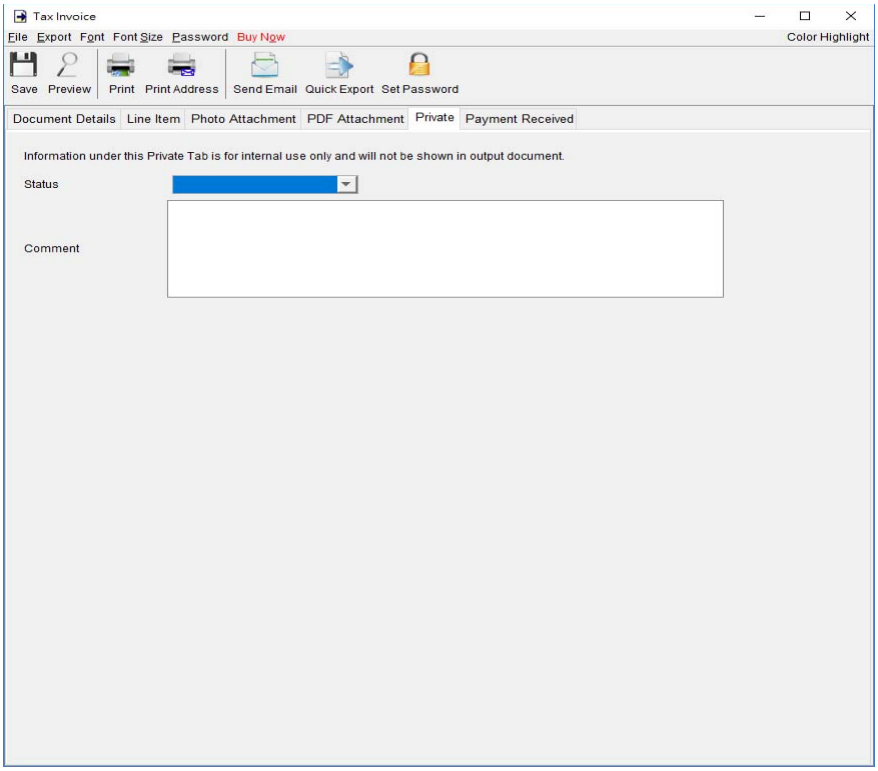
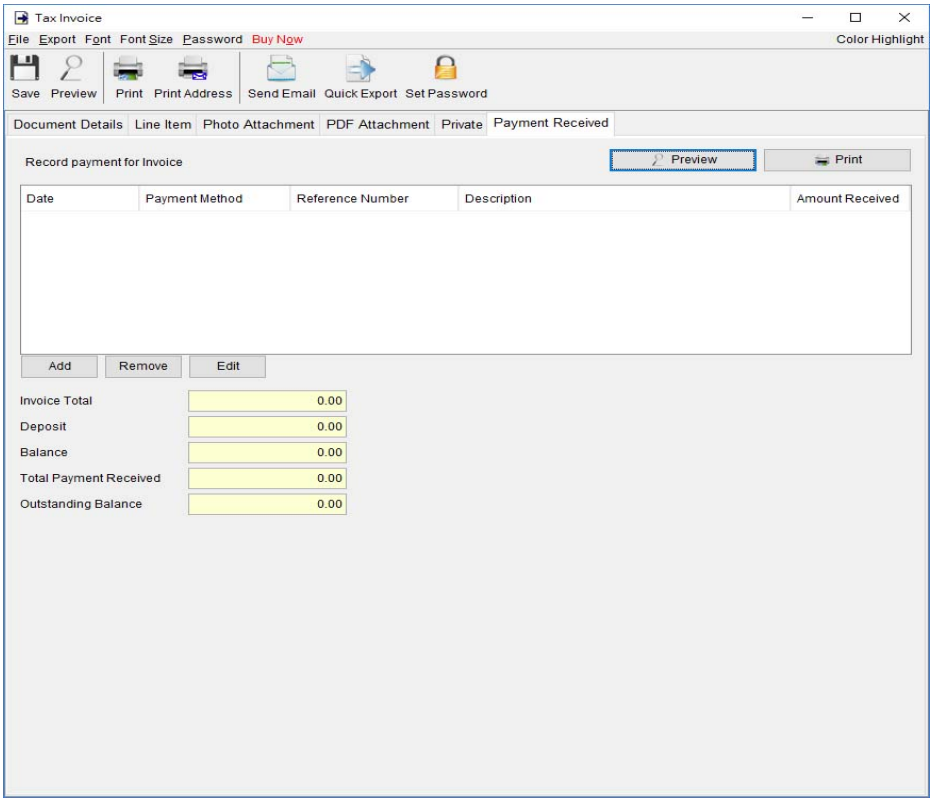
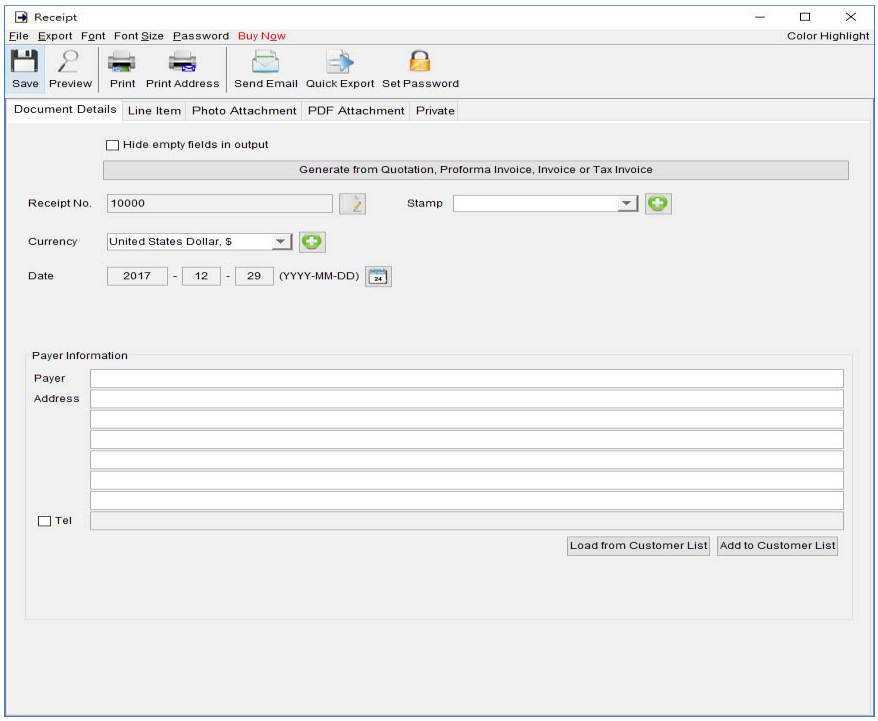


Payment Received – This tab is to record the payment received for the Tax Invoice. Click [Add] button add a record for the payment. User can provide date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The payment received record can be previewed or printed out by clicking [Preview] or [Print] button at the top right corner.



4.5. Receipt



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Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Receipt Details</u>

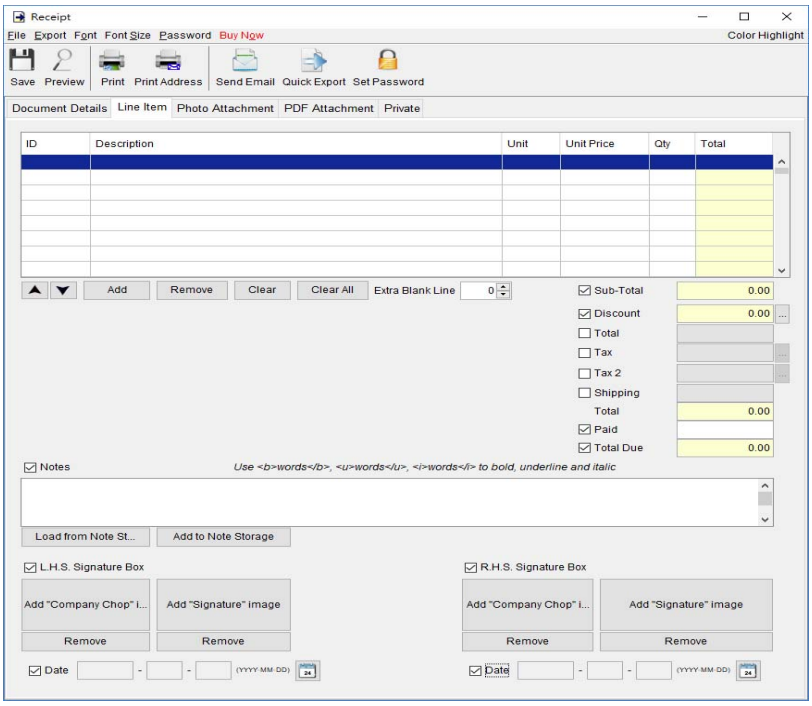
There are five parts in Receipt:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Receipt, includes Receipt Number, Date, and Payer Information. Payer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Receipt can also be generated from Quotation, Proforma Invoice, Invoice or Tax Invoice. The data in selected document will be copied to the Receipt.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before the "Sub-Total", "Discount", "Shipping", "Tax", "Deposit", and "Balance" field is to indicate whether this cell will be shown out in the output document.

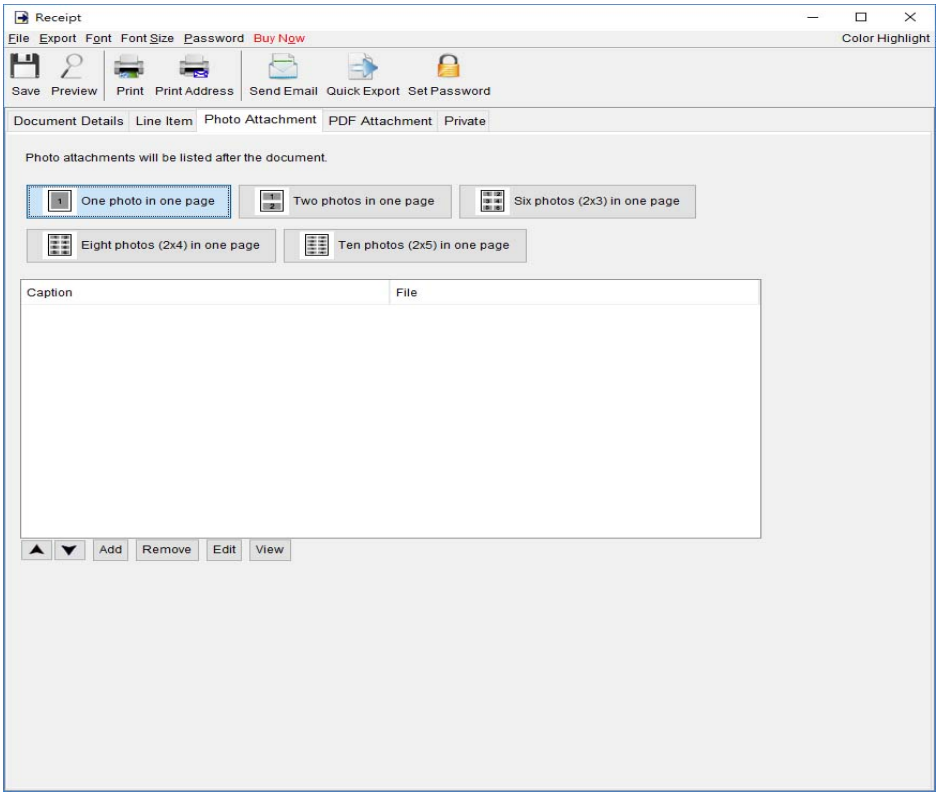
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

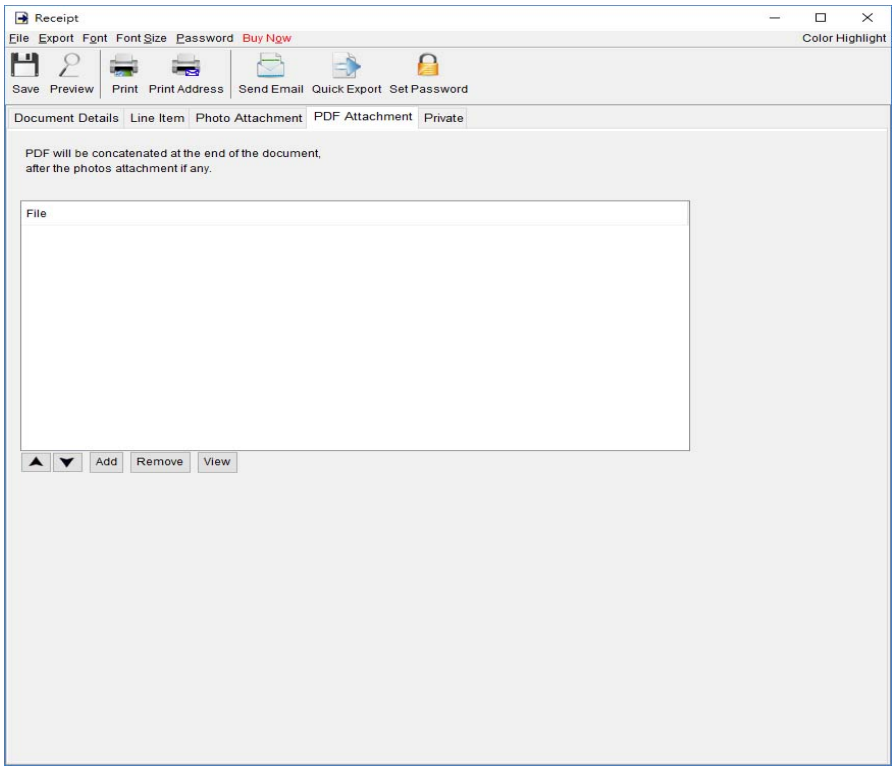
Photo Attachment – Photos can be attached to the end of Receipt. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

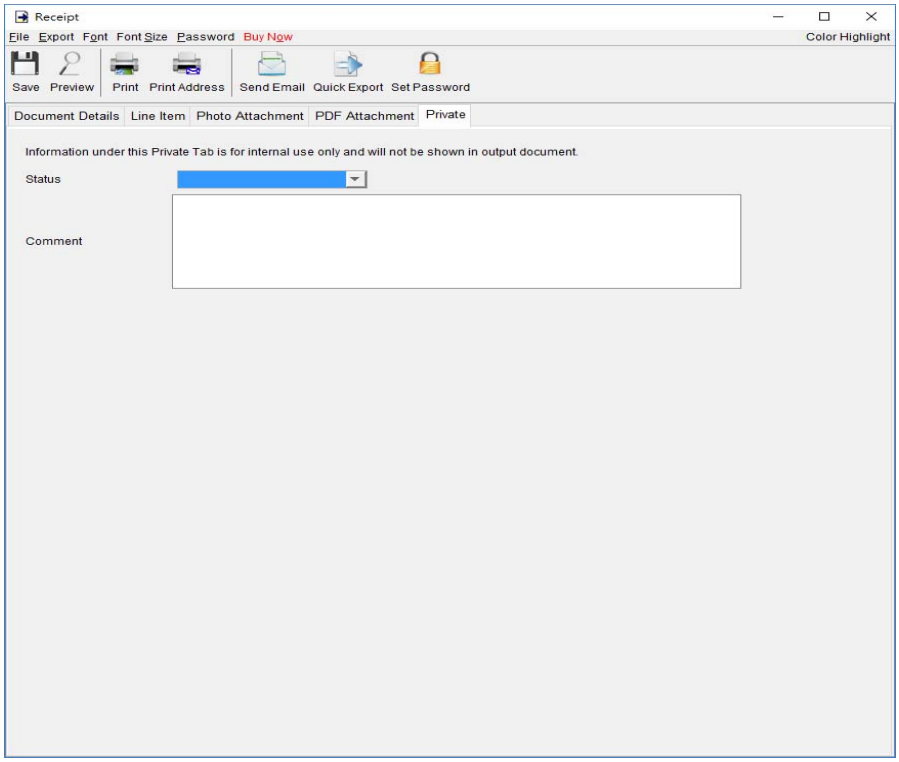
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



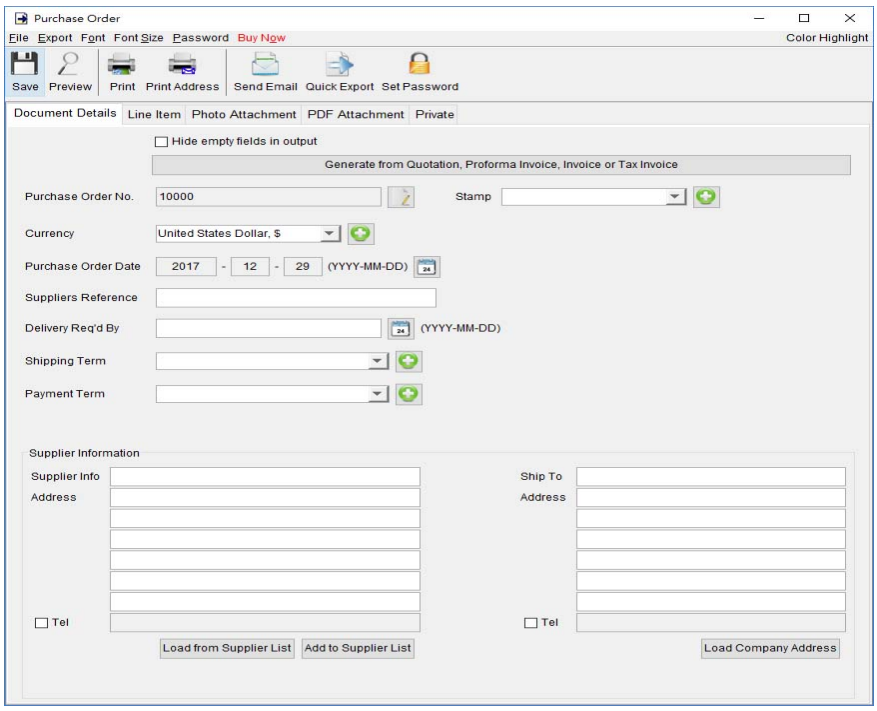
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.6. Purchase Order



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

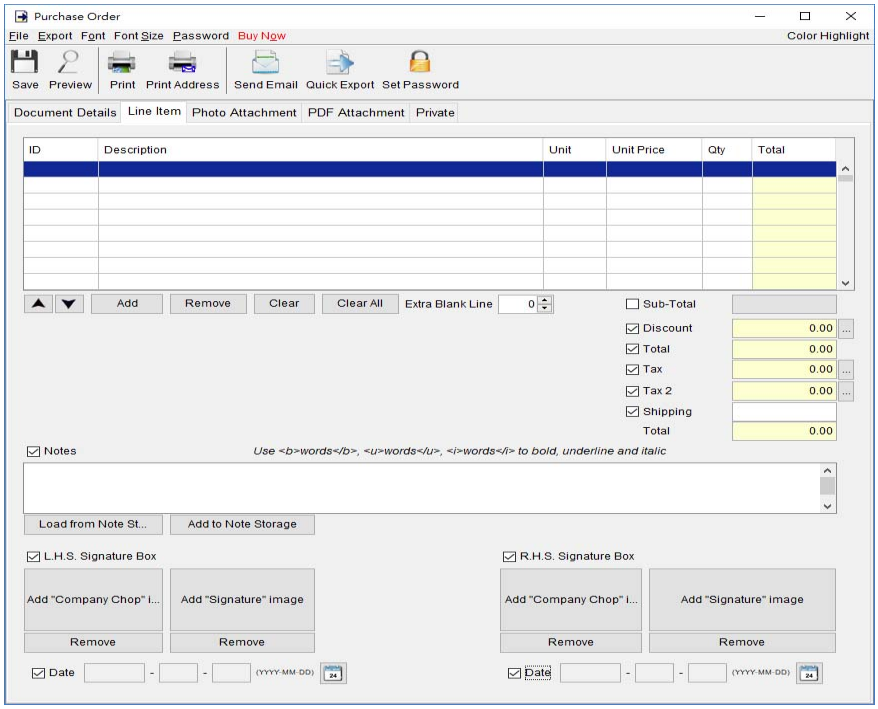
<u>Purchase Order Details</u>

There are five parts in Purchase Order:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information, includes Number, Currency, Date, Payment/Shipping Term, Delivery Req'd By, Suppliers Reference and Supplier Information. Supplier Information can be typed in directly or load from the Supplier List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.
Purchase Order can also be generated from Quotation, Proforma Invoice, Invoice and Tax Invoice. The data in selected document will be copied to the Purchase Order.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



The Checkbox shown before the "Sub-Total", "Discount", "Shipping", "Tax", "Deposit", and "Balance" is to indicate whether this cell will be shown out in the output document.

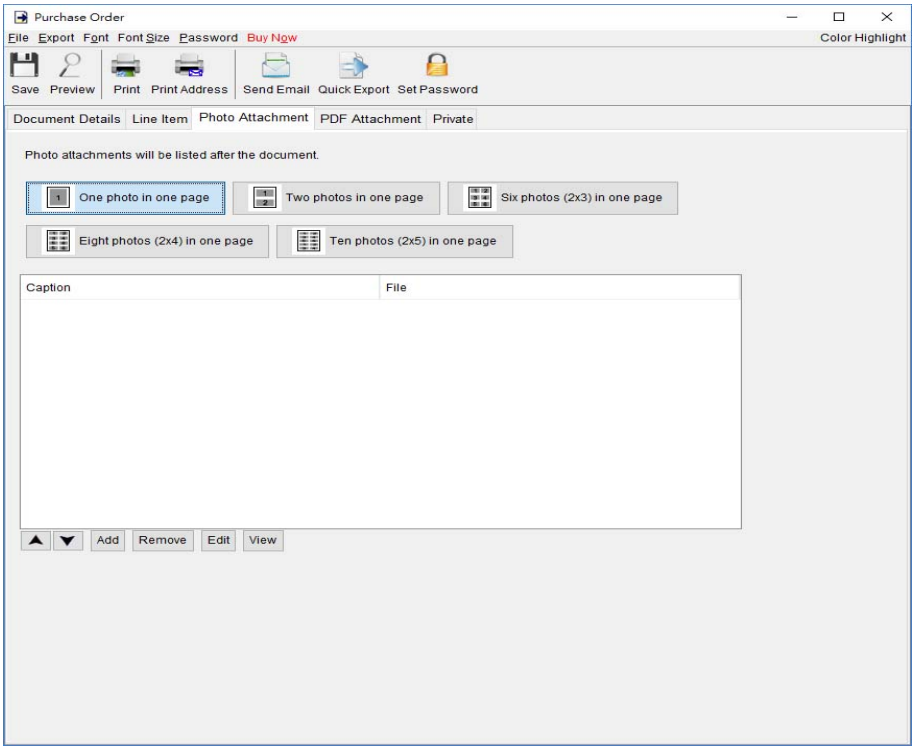
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

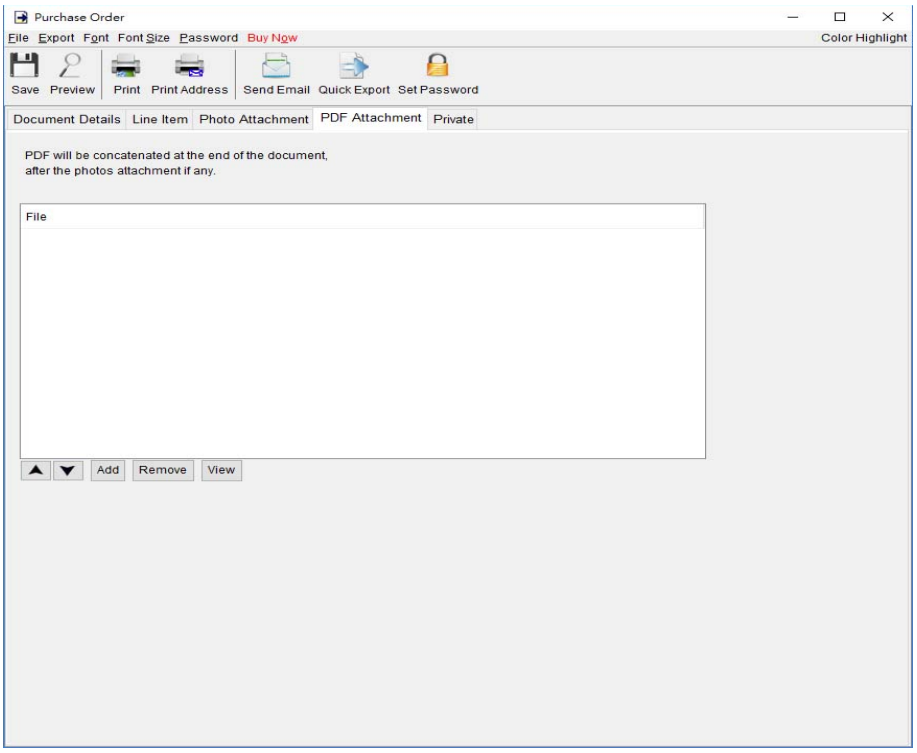
Photo Attachment – Photos can be attached to the end of Purchase Order. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

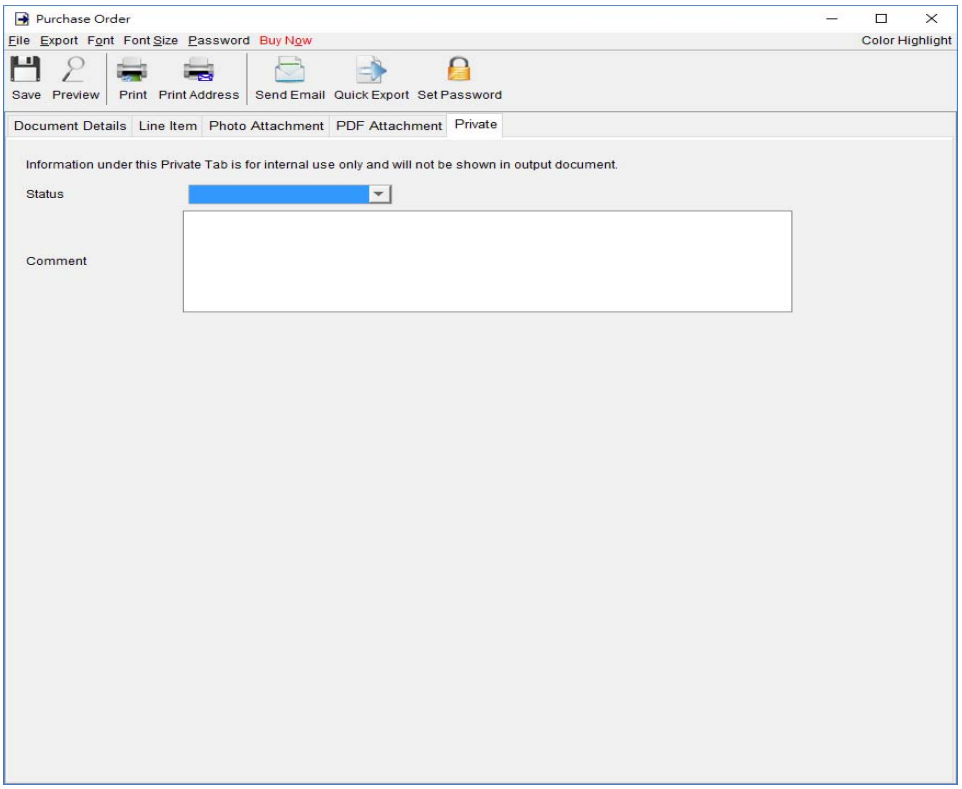
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



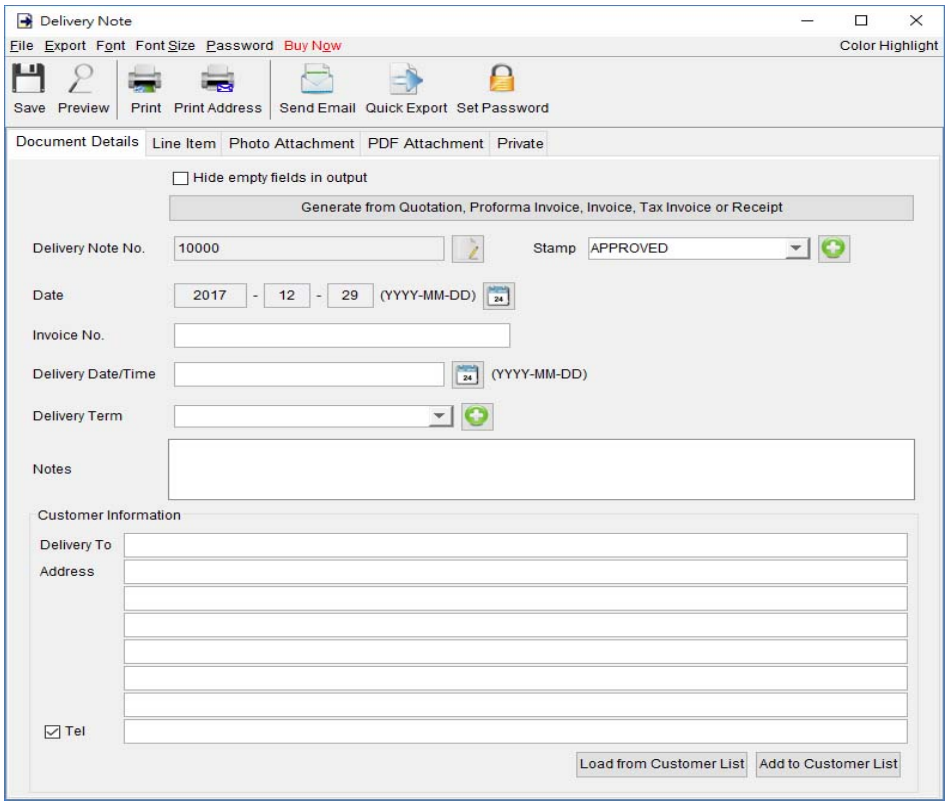
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.7. Delivery Note



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Delivery Note Details</u>

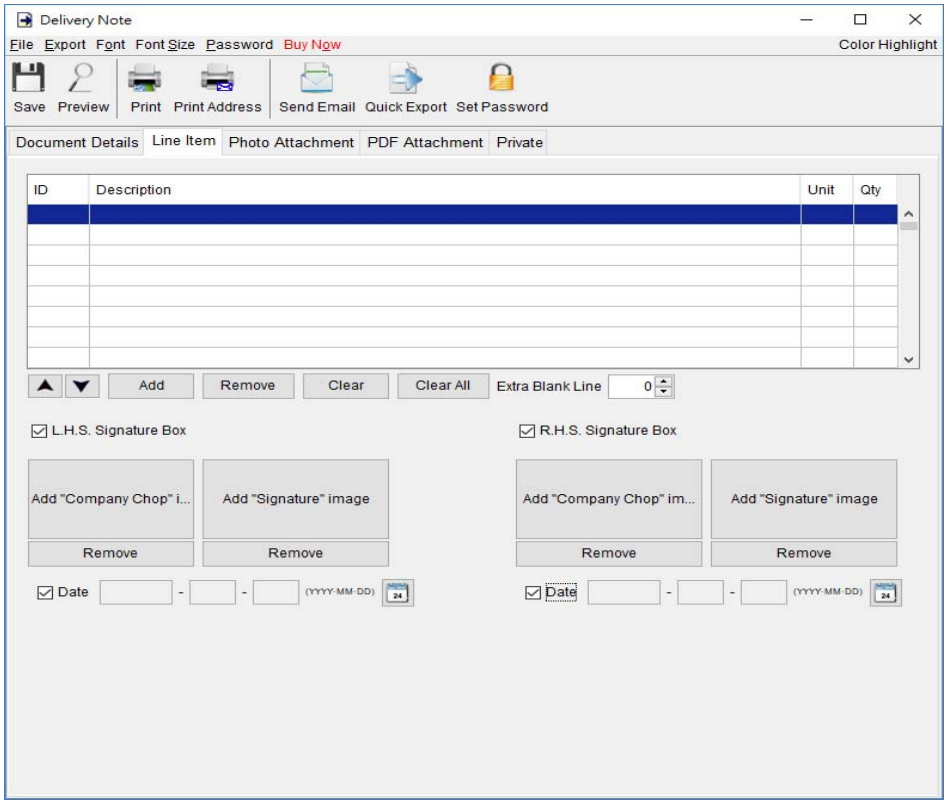
There are five parts in Delivery Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Delivery Note, includes Delivery Note Number, Date, Invoice Number and Delivery Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Delivery Note can also be generated from Quotation, Proforma Invoice, Invoice, Tax Invoice and Receipt. The data in selected document will be copied to the Delivery Note.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.

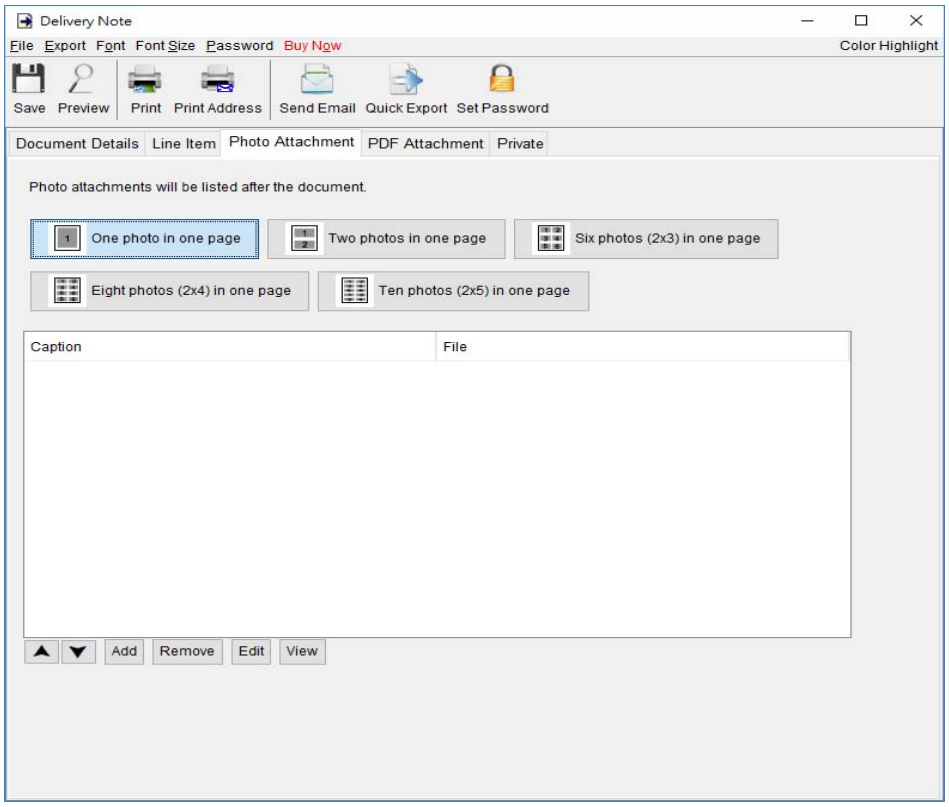


Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

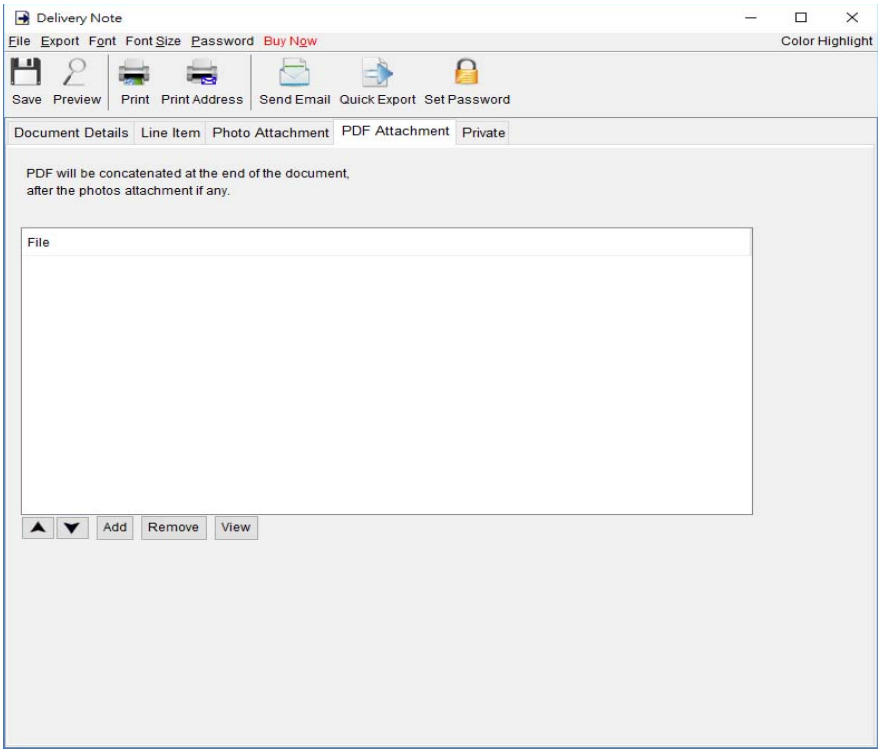
Photo Attachment – Photos can be attached to the end of Delivery Note. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

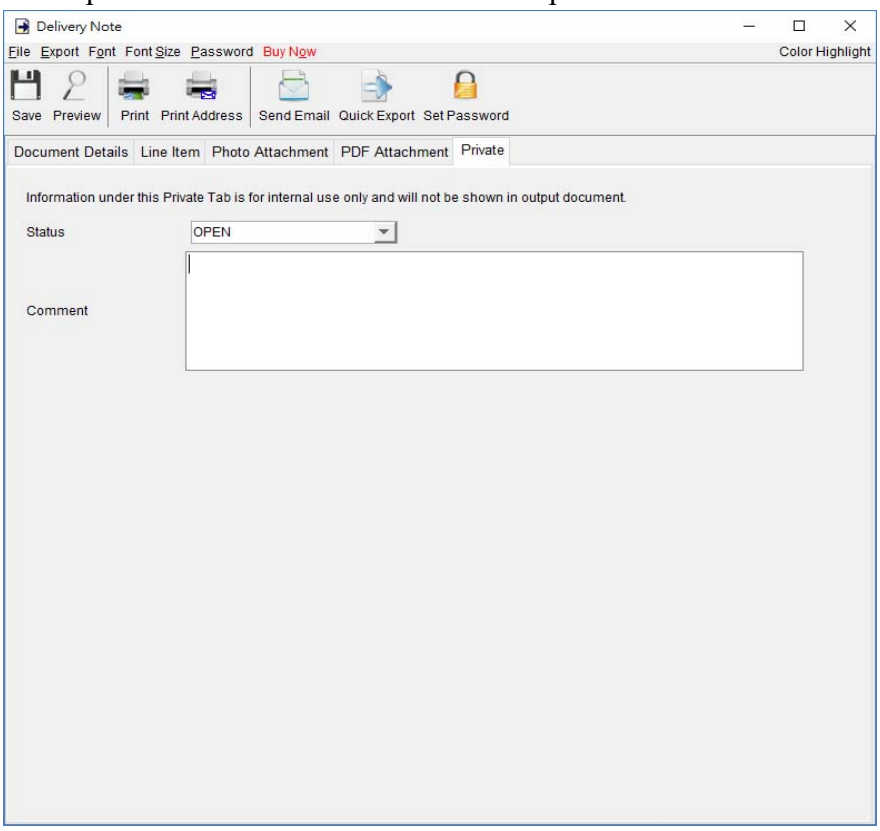
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



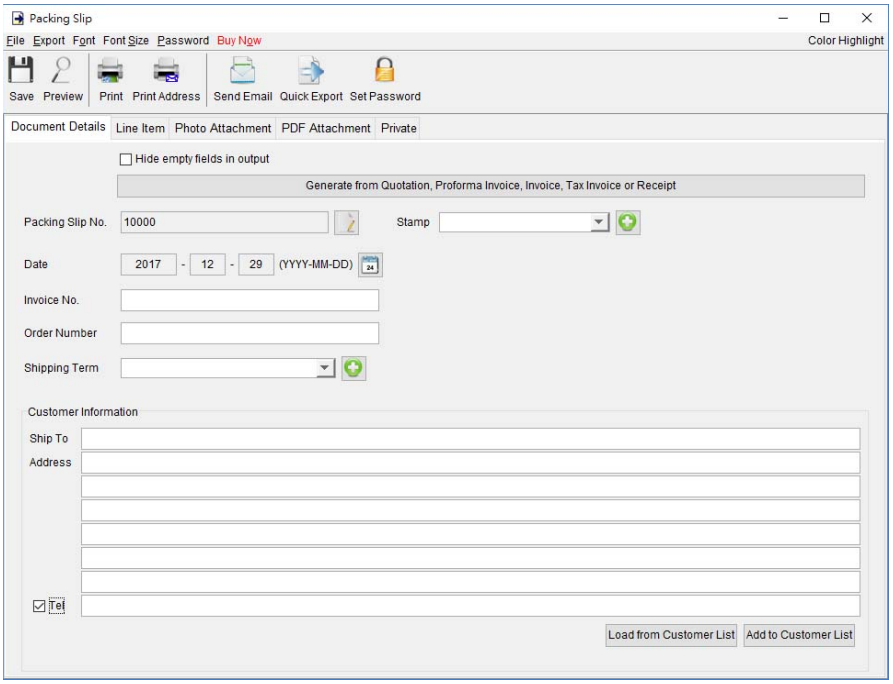
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.8. Packing Slip



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Packing Slip Details</u>

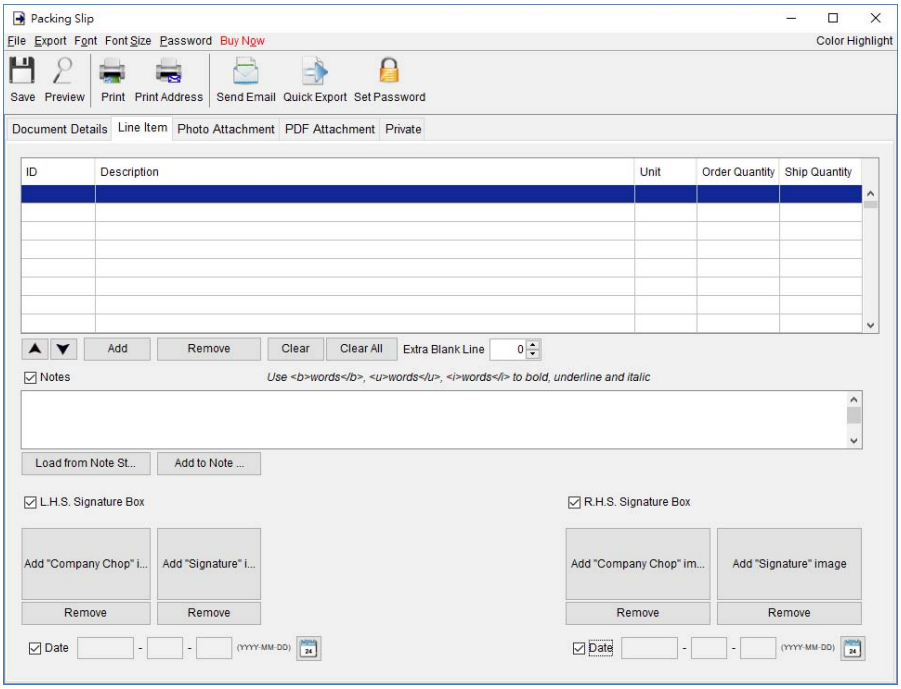
There are five parts in Packing Slip:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Packing Slip, includes Packing Slip Number, Date, and Invoice Number. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Packing Slip can also be generated from Quotation, Proforma Invoice, Invoice, Tax Invoice and Receipt. The data in selected document will be copied to the Packing Slip.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



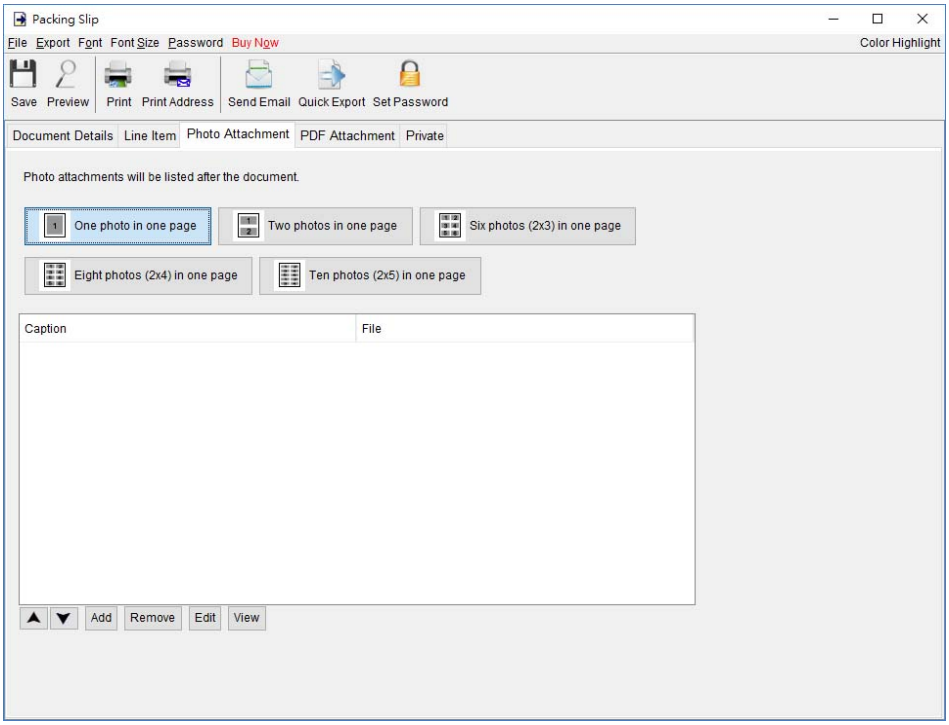
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

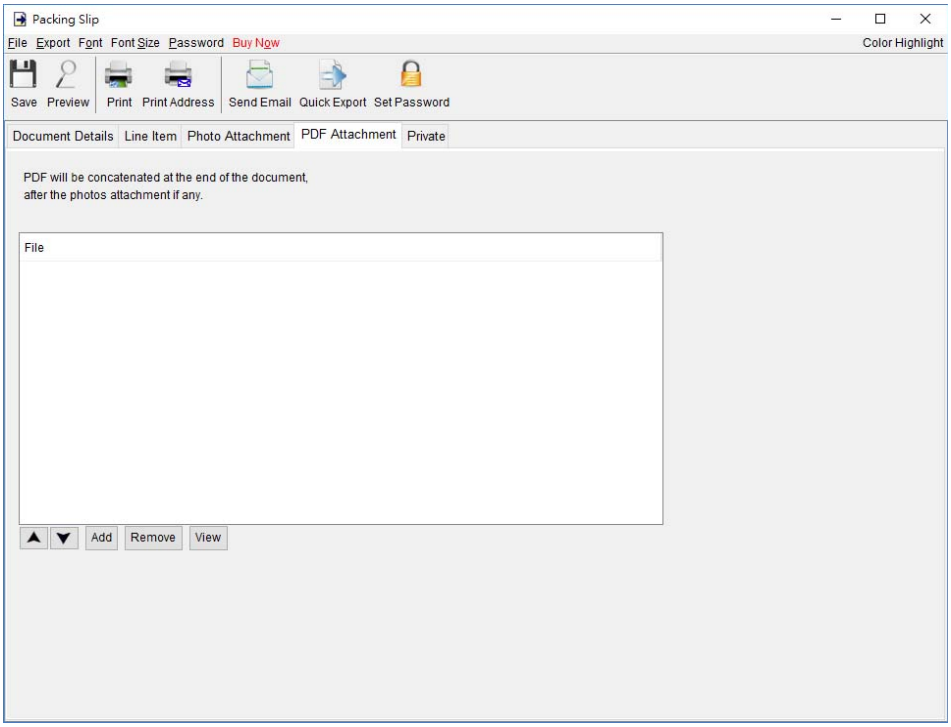
Photo Attachment – Photos can be attached to the end of Packing Slip. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

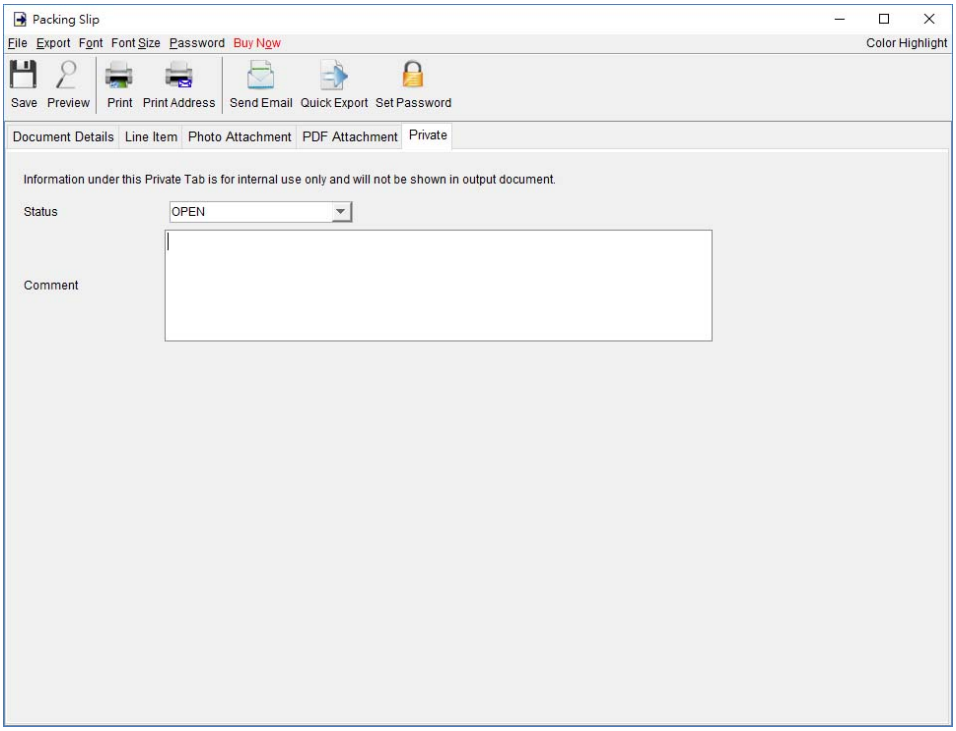
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



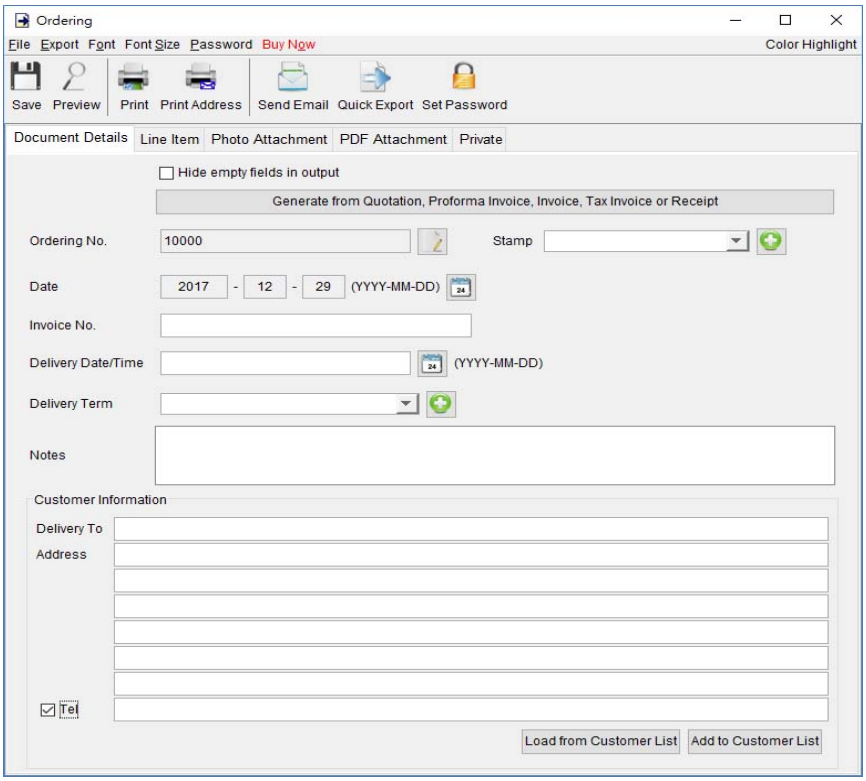
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.9. Ordering



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Ordering Details</u>

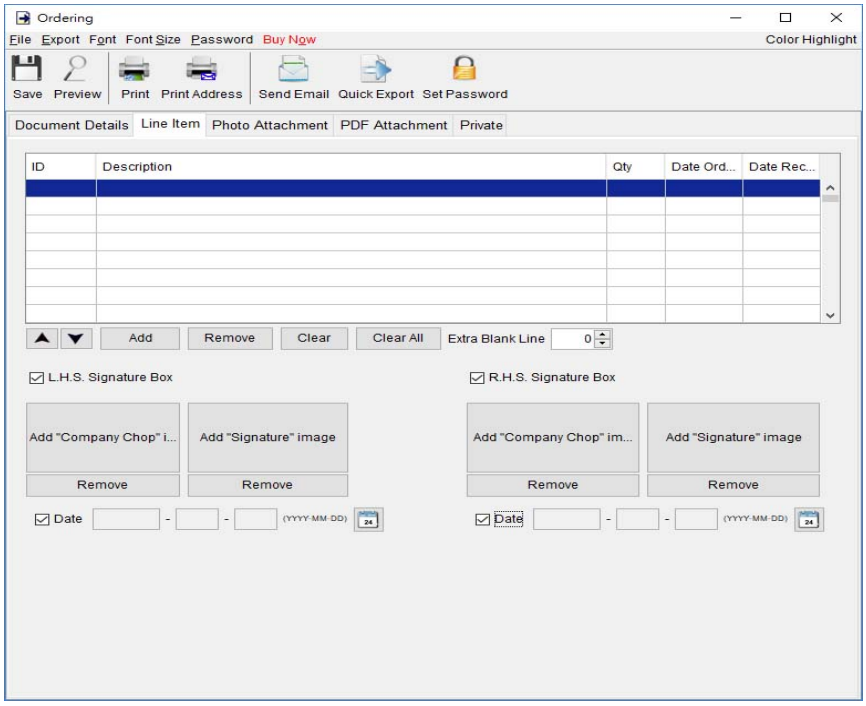
There are five parts in Ordering:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Ordering, includes Ordering Number, Date, Invoice Number and Delivery Information. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Ordering can also be generated from Quotation, Proforma Invoice, Invoice, Tax Invoice and Receipt. The data in selected document will be copied to the Ordering.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.

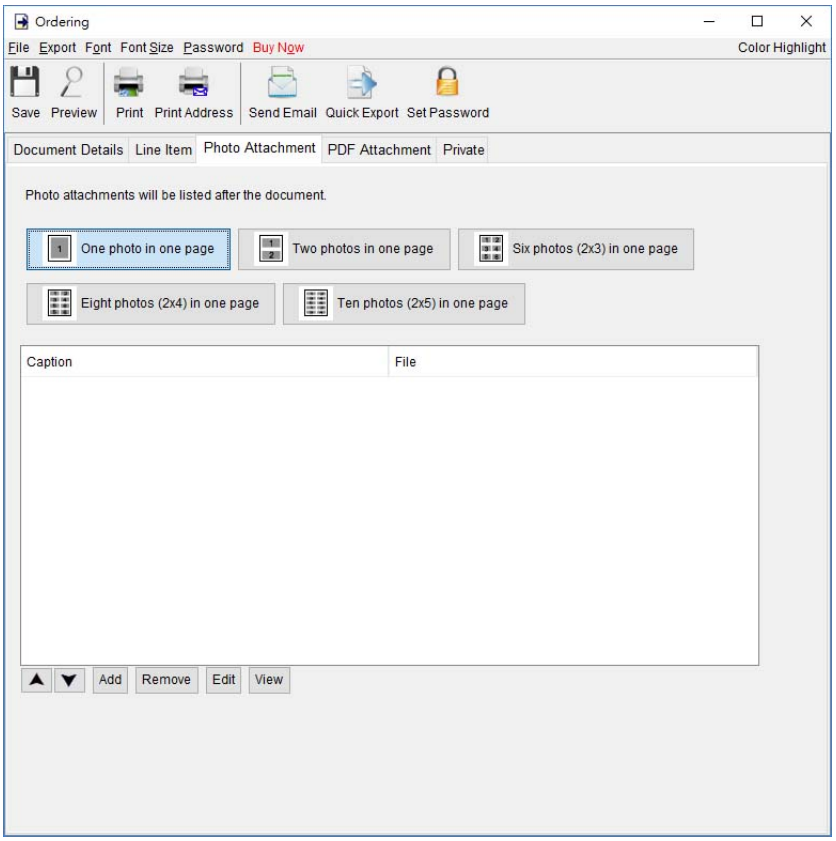


Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

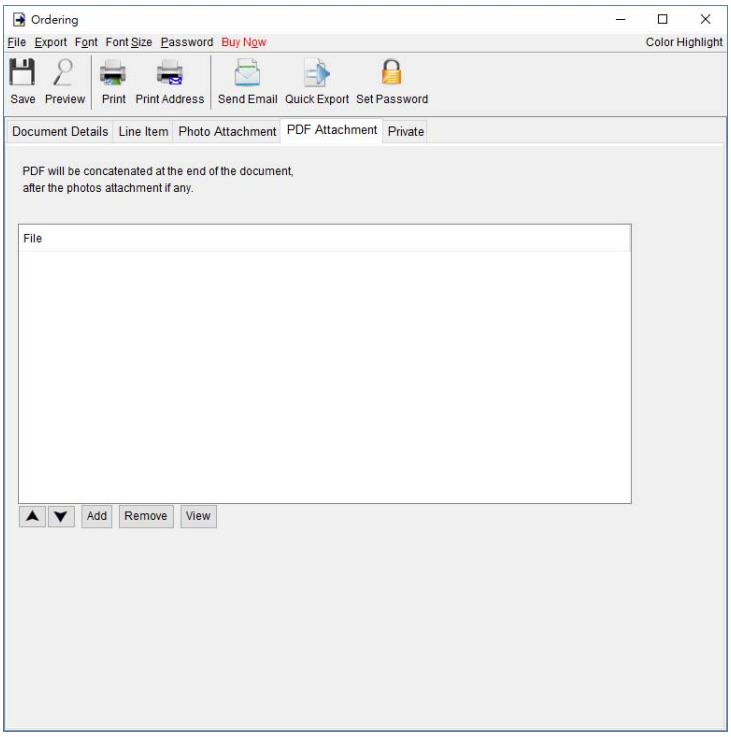
Photo Attachment – Photos can be attached to the end of Ordering. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

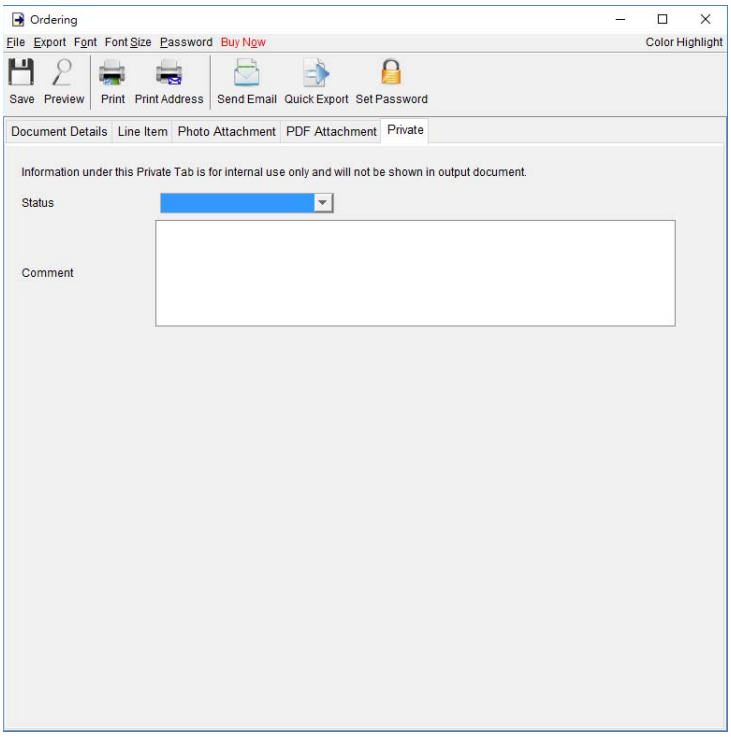
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



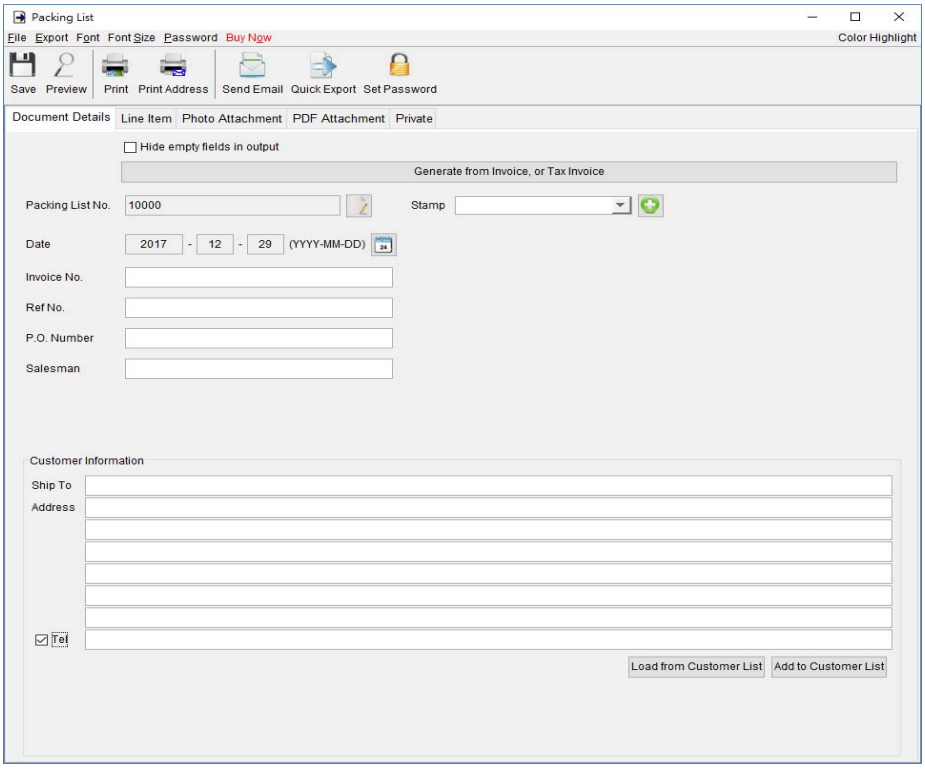
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.10. Packing List



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Packing List Details</u>

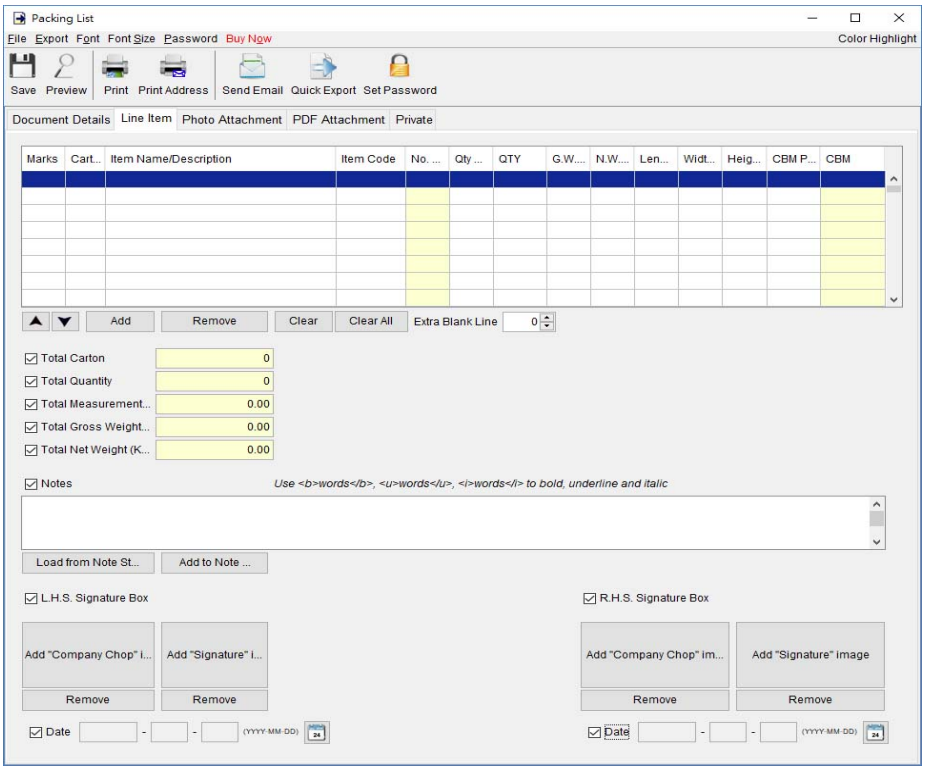
There are five parts in Packing List:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Packing List, includes Packing List Number, Date, and Invoice Number. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Packing List can also be generated from Invoice and Tax Invoice. The data in selected document will be copied to the Packing List.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



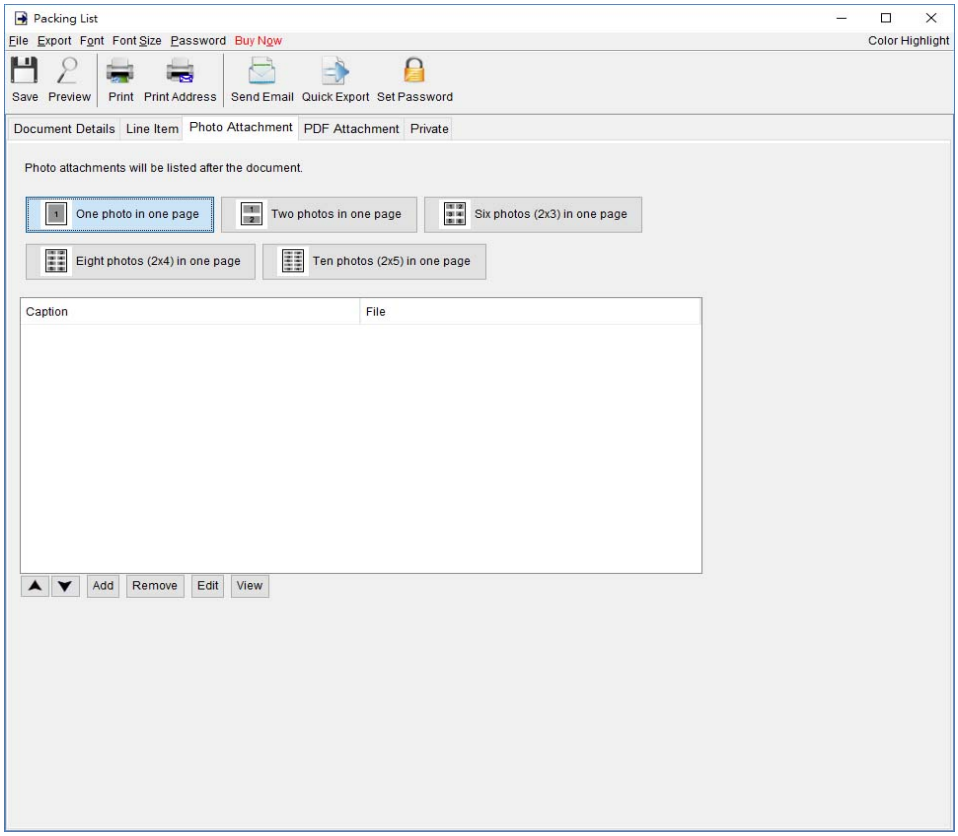
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

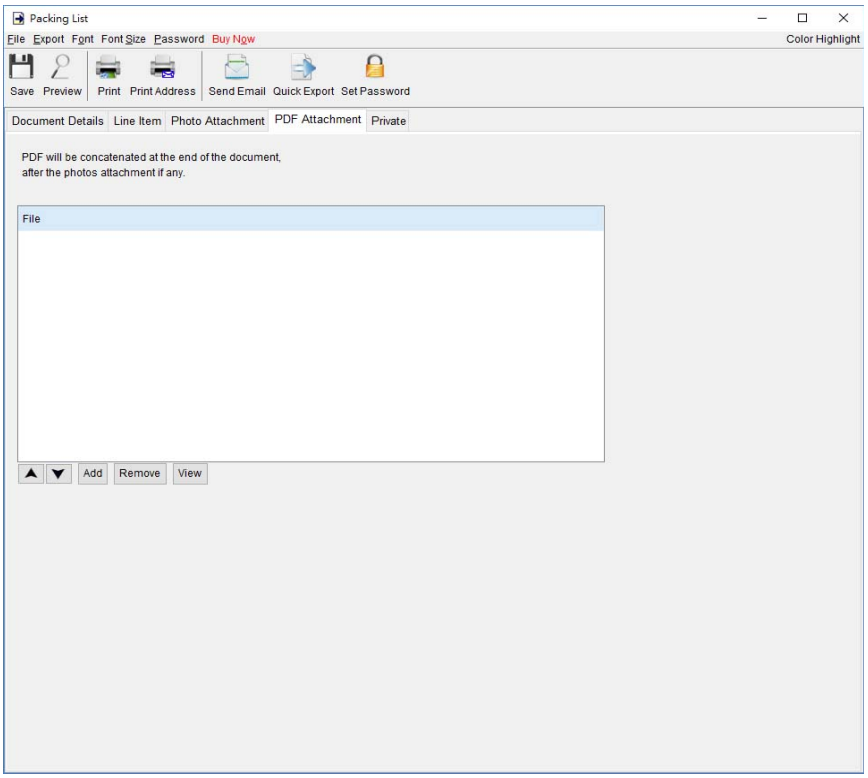
Photo Attachment – Photos can be attached to the end of Packing List. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

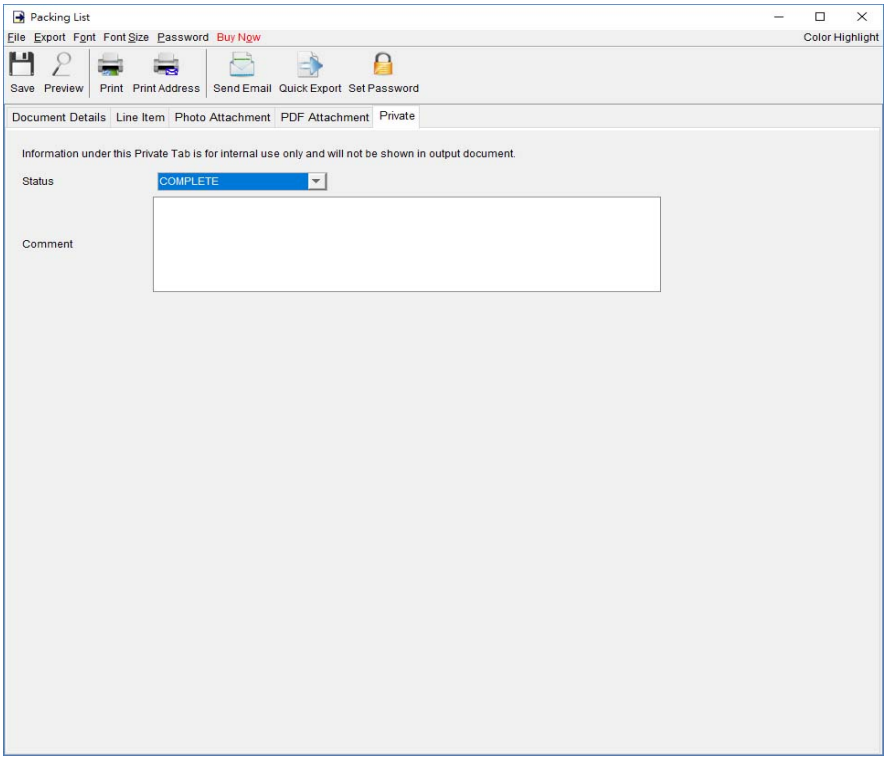
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



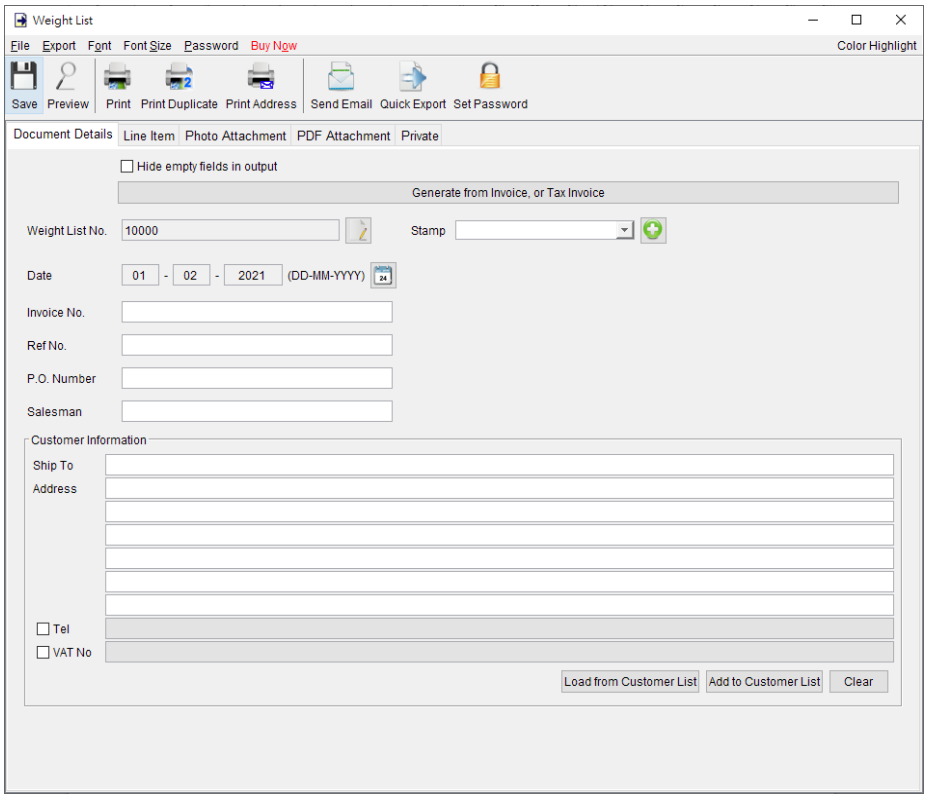
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.11. Weight List



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

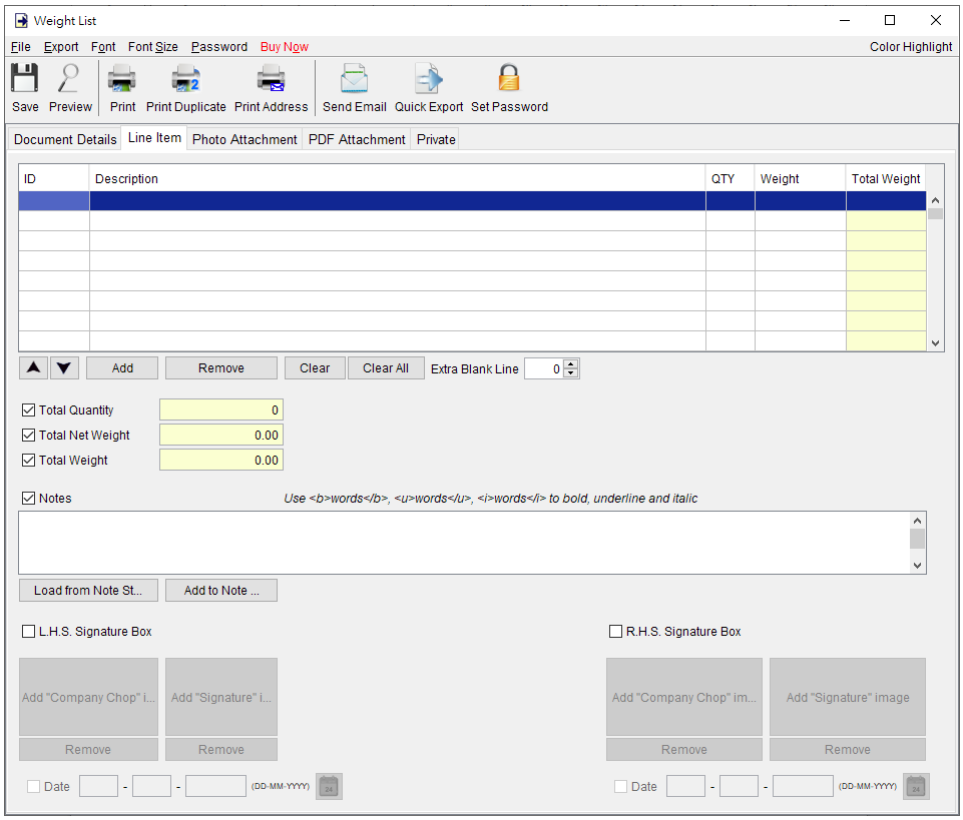
<u>Weight List Details</u>

There are five parts in Credit Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Weight List, includes Weight List Number, Date, and Currency. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Weight List can also be generated from Invoice and Tax Invoice. The data in selected document will be copied to the Weight List.



Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.

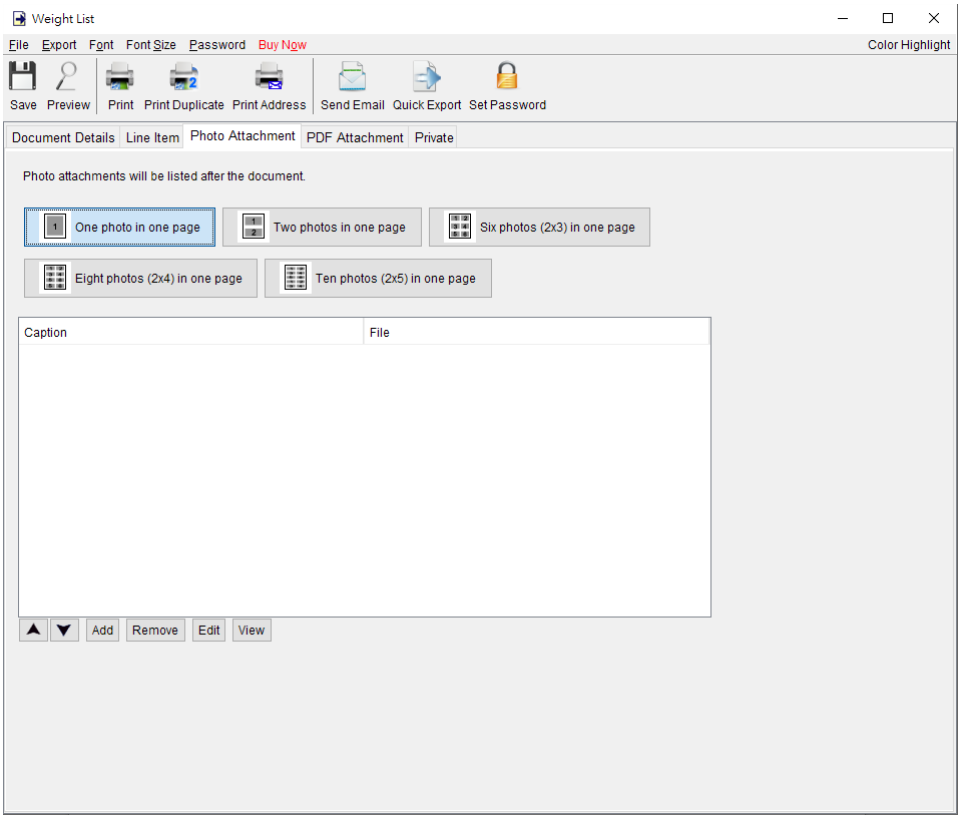
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

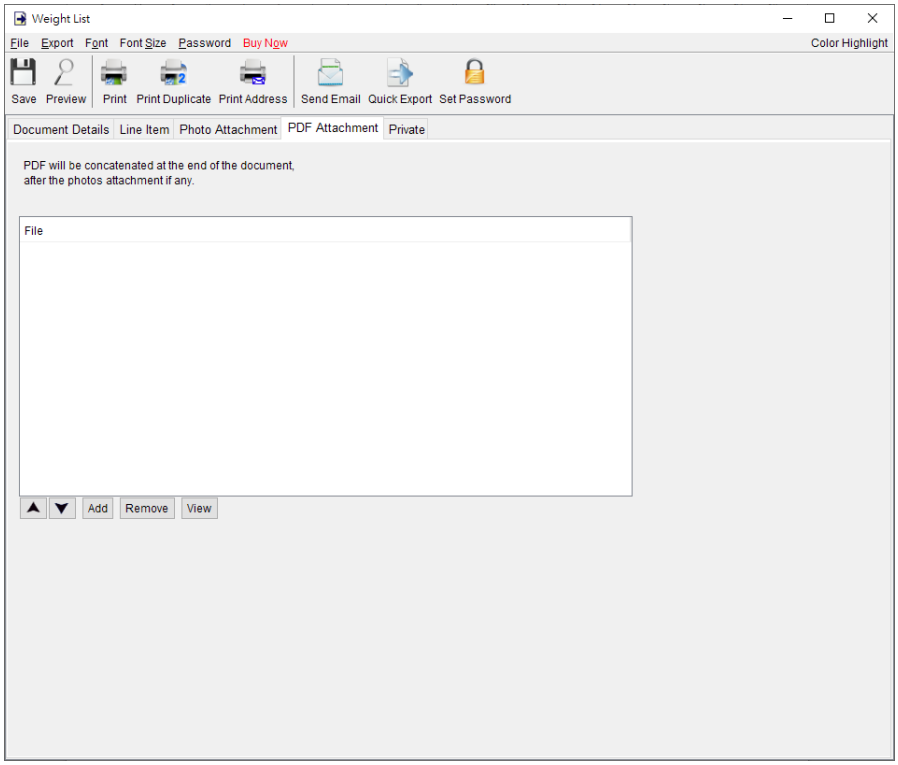
Photo Attachment – Photos can be attached to the end of Credit Note. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

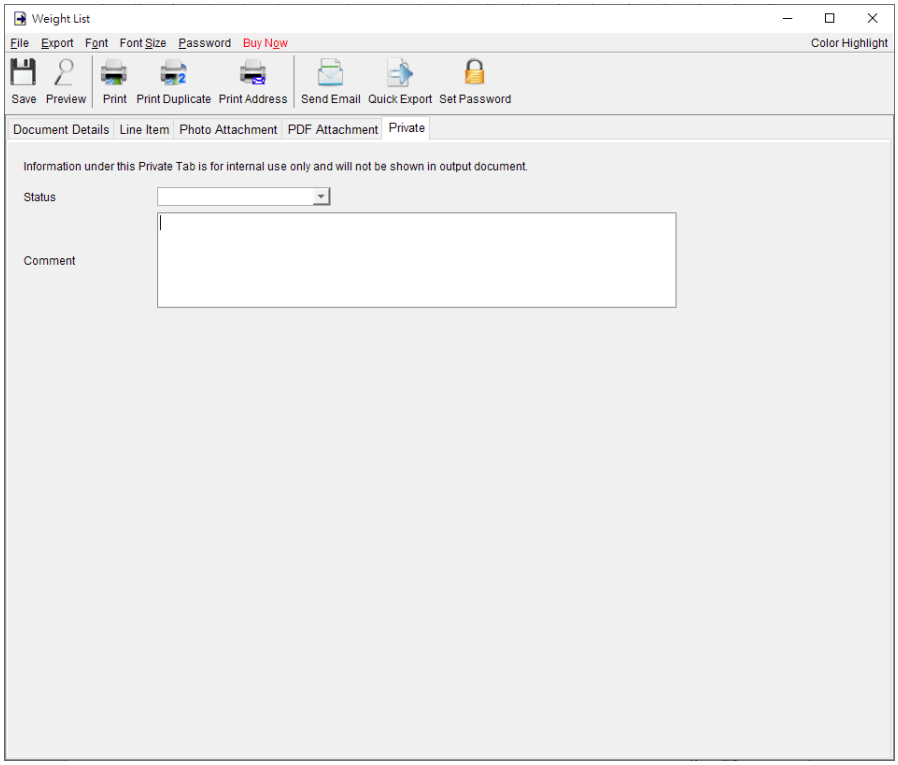
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



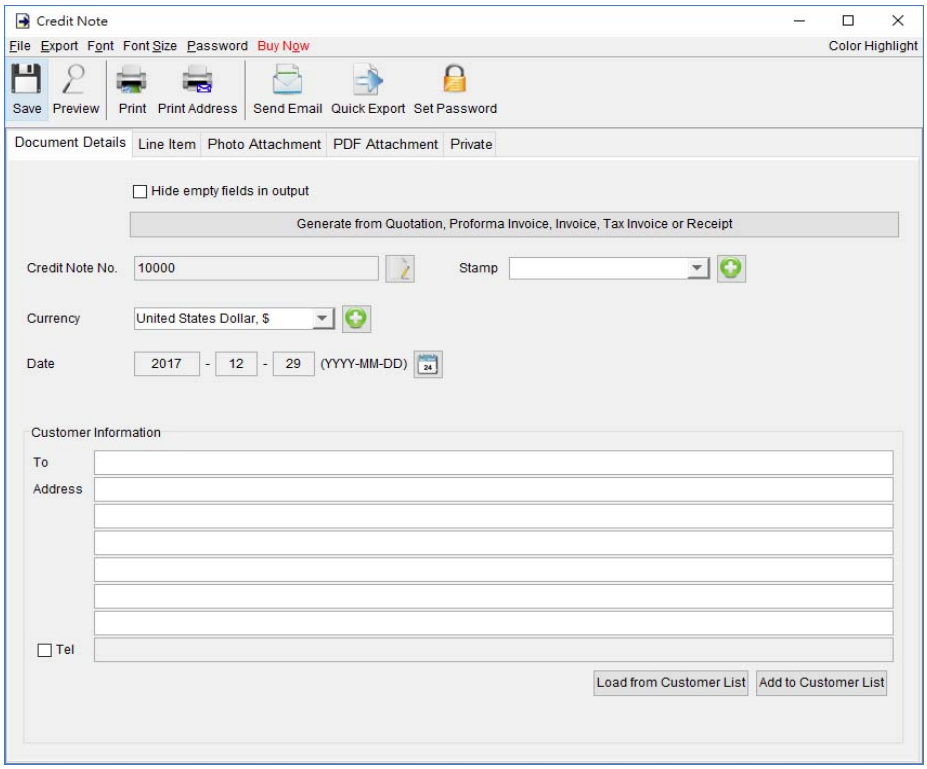
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.12. Credit Note



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

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Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

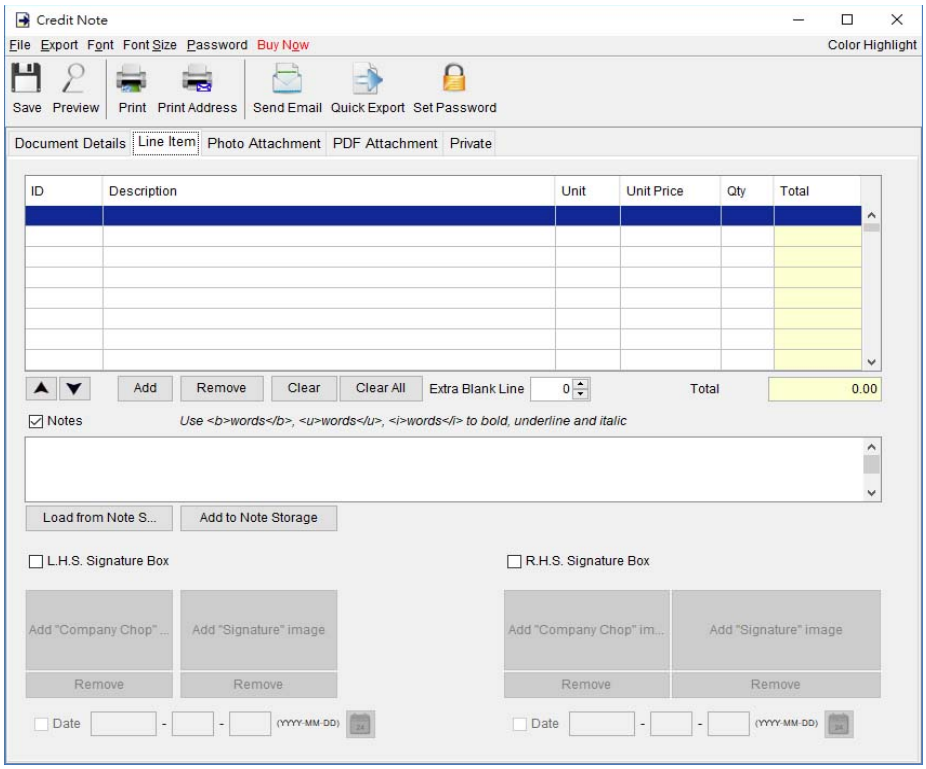
<u>Credit Note Details</u>

There are five parts in Credit Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Credit Note, includes Credit Note Number, Date, and Currency. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Credit Note can also be generated from Quotation, Proforma Invoice, Invoice, Tax Invoice and Receipt. The data in selected document will be copied to the Credit Note.



Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.

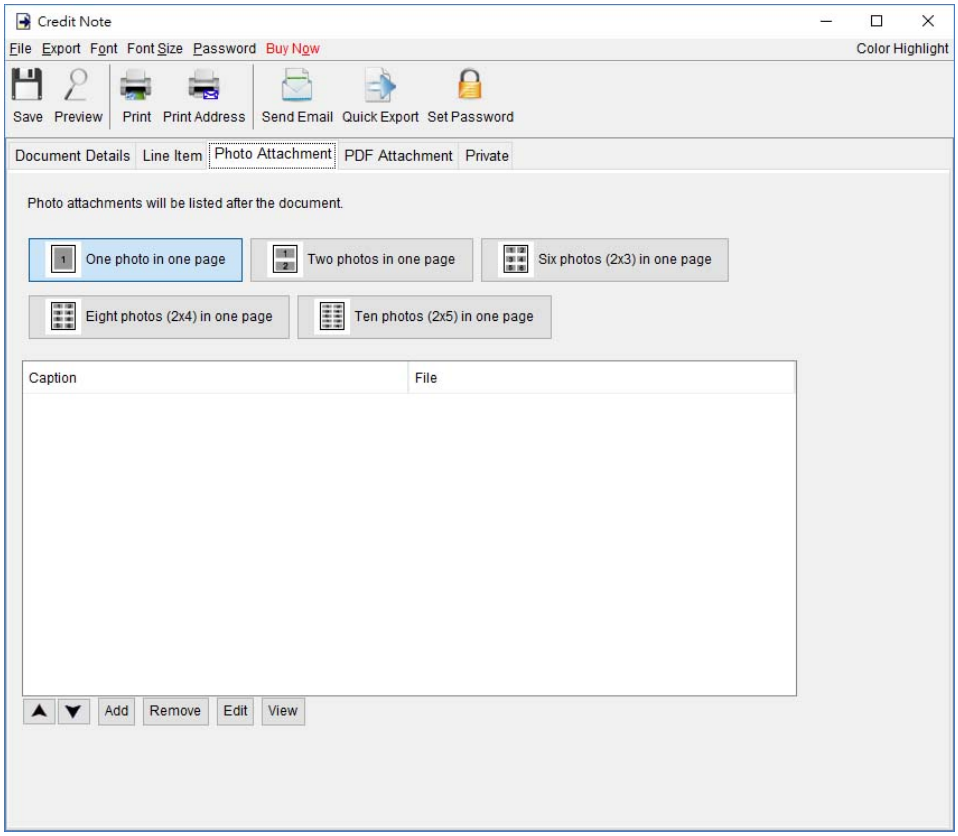
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

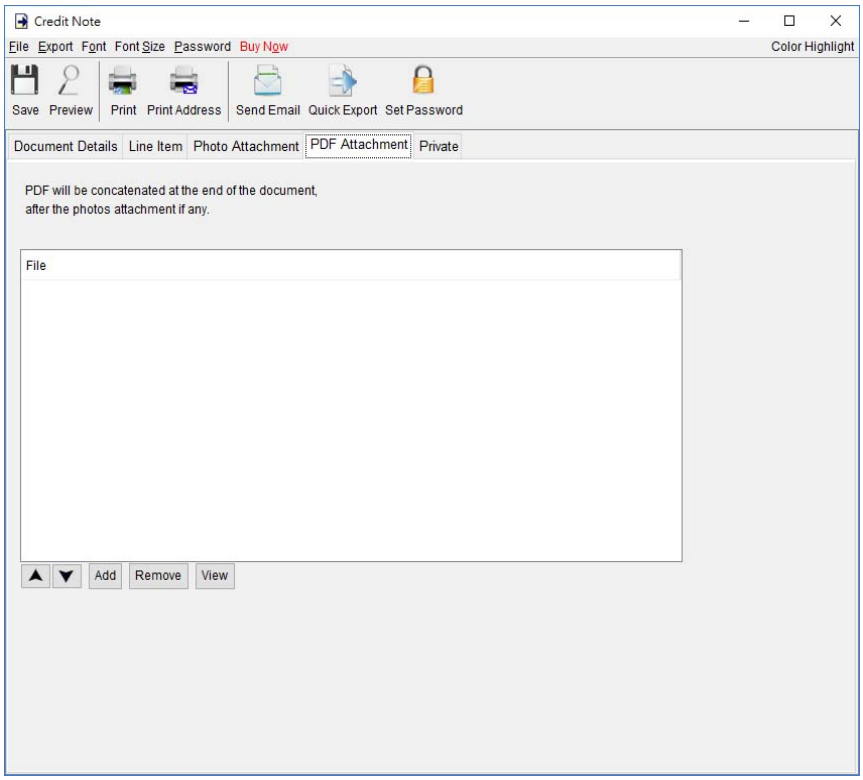
Photo Attachment – Photos can be attached to the end of Credit Note. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

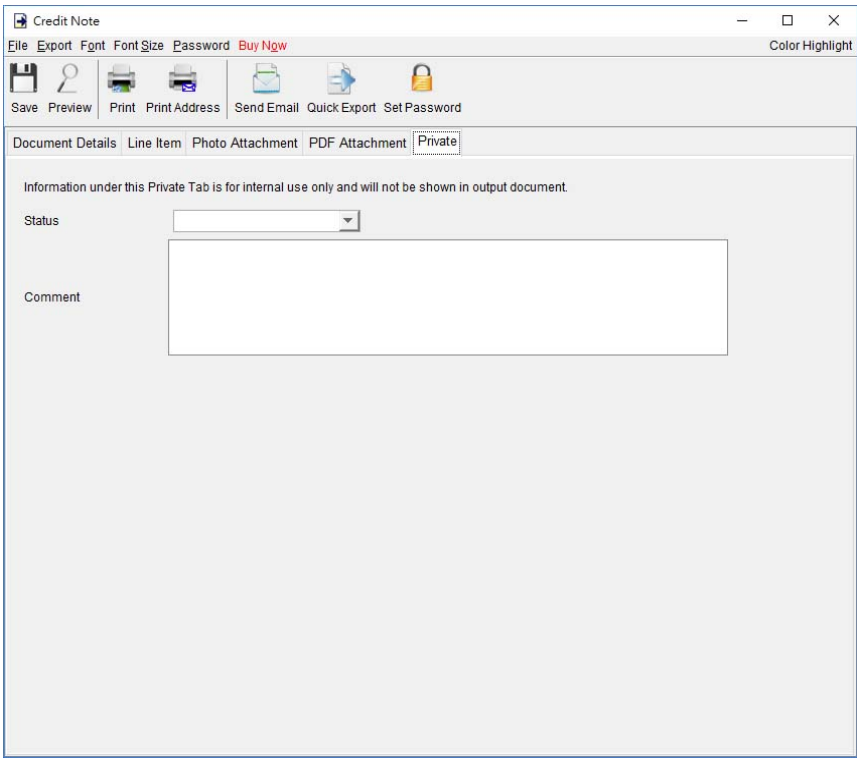
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



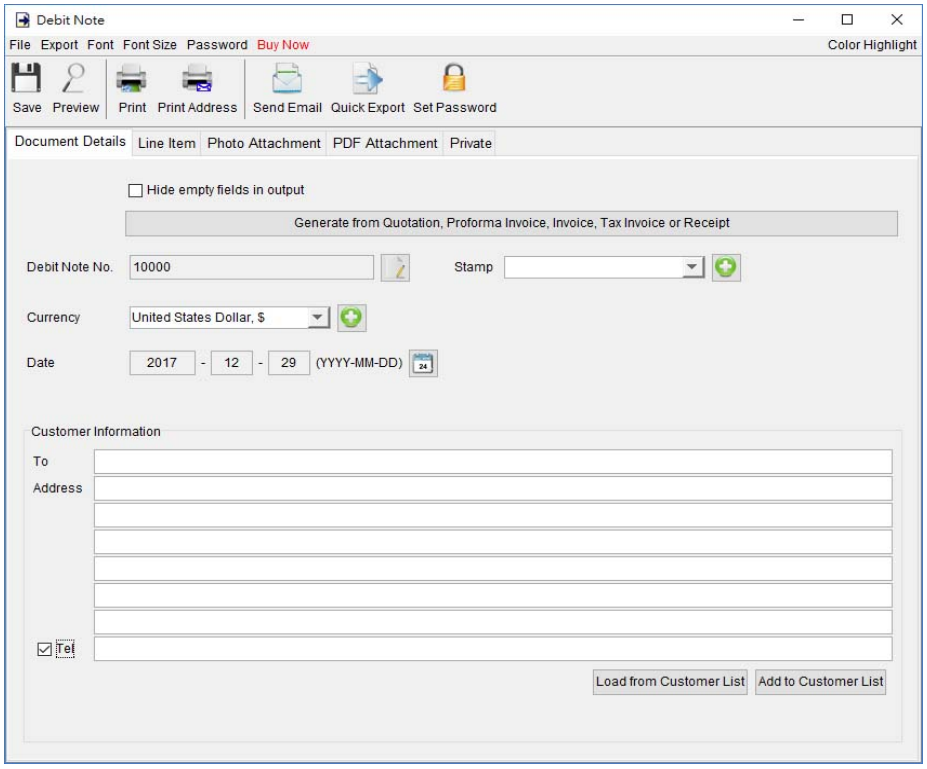
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



4.13. Debit Note



At the top is **Menu Bar** and **Button Bar. Menu Bar** provides following

File – User can save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font – Specify the font and writing direction for this document.

Font Size – Specify the font size.

Password – User can set a password to protect the document from access.

<u>Debit Note Details</u>

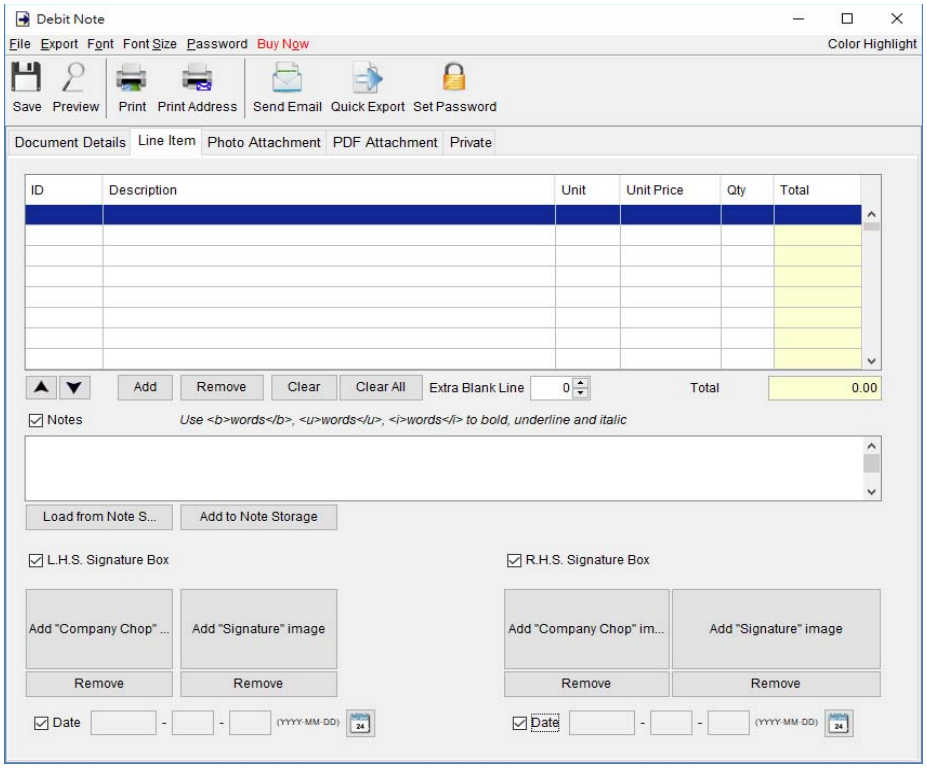
There are five parts in Debit Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – User can specify the header information of the Debit Note, includes Debit Note Number, Date, and Currency. Customer Information can be typed in directly or load from the Customer List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

Debit Note can also be generated from Quotation, Proforma Invoice, Invoice, Tax Invoice and Receipt. The data in selected documents will be copied to the Debit Note.

Line Item – Line Item information can be input here. The value in highlighted cell (Yellow) will be calculated automatically. User can add the Line Item by typing in the table directly or clicking [Add] button to load from the Item List.



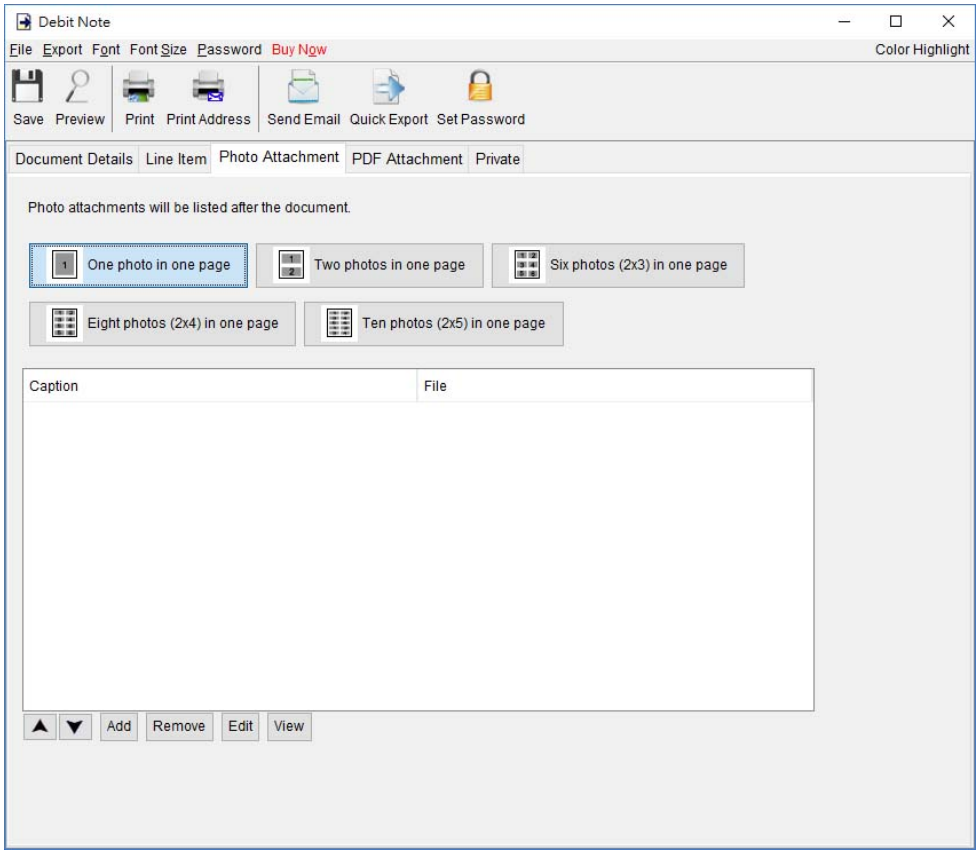
User can input up to 40 lines information in the "Notes". It supports <b>, <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

Two optional signature boxes are provided at the bottom of the document. User can provide "Company Chop" and "Signature" images, which will be shown on the PDF output.

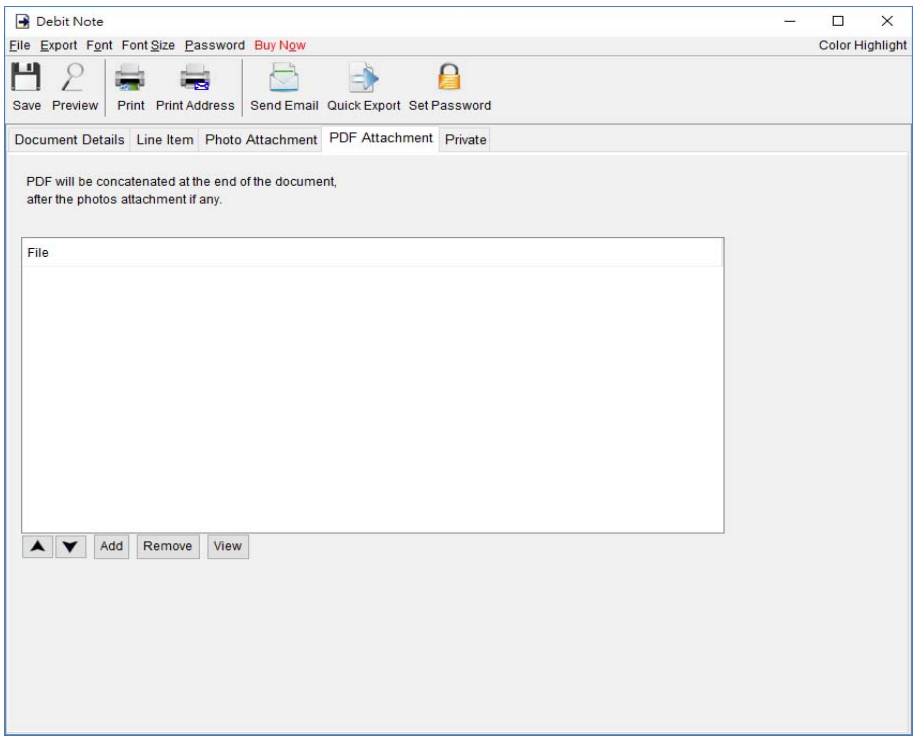
Photo Attachment – Photos can be attached to the end of Debit Note. Five layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page

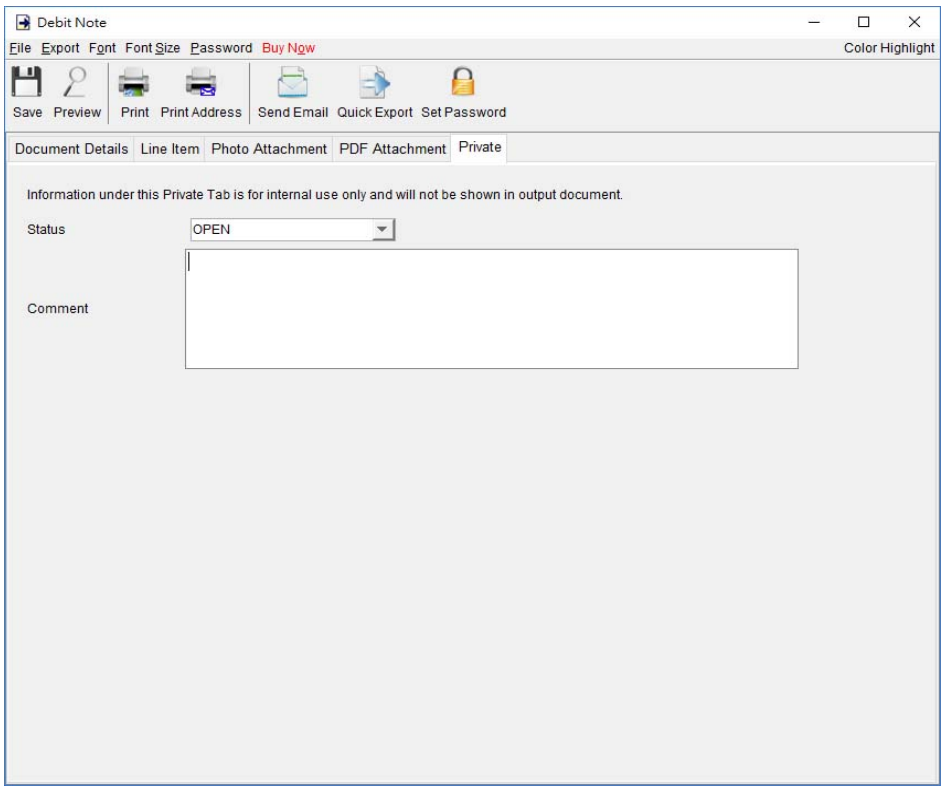
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



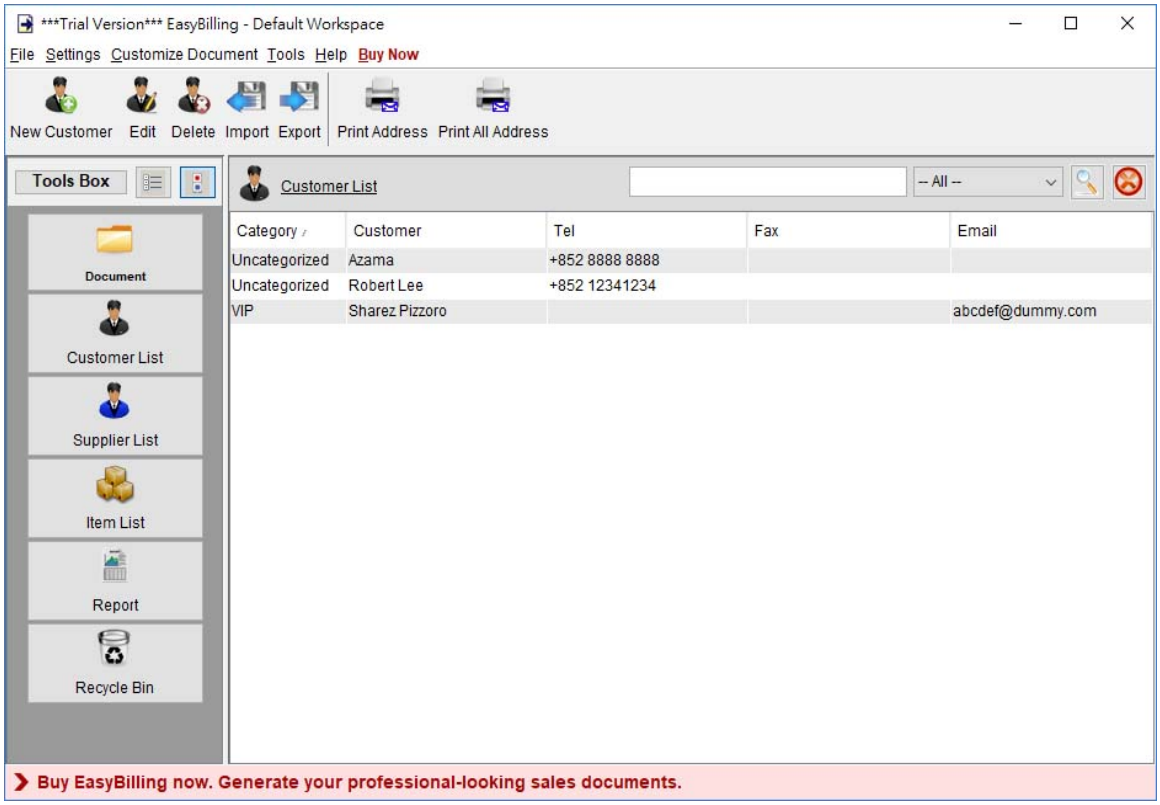
PDF Attachment – PDF file can be appended to the PDF output of document.



Private – User can specify document status and type comments under private tab. Information under private tab will not shown in the output.



5. CUSTOMER LIST



Customer List provides storage for all customer information. User can easily manage the customer information and get the customer information into the document easily.

Tool Bar

New – Add a new customer.

Edit – Edit the selected customer.

Delete – Delete the selected customer.

Import – Import customer from a XLS file.

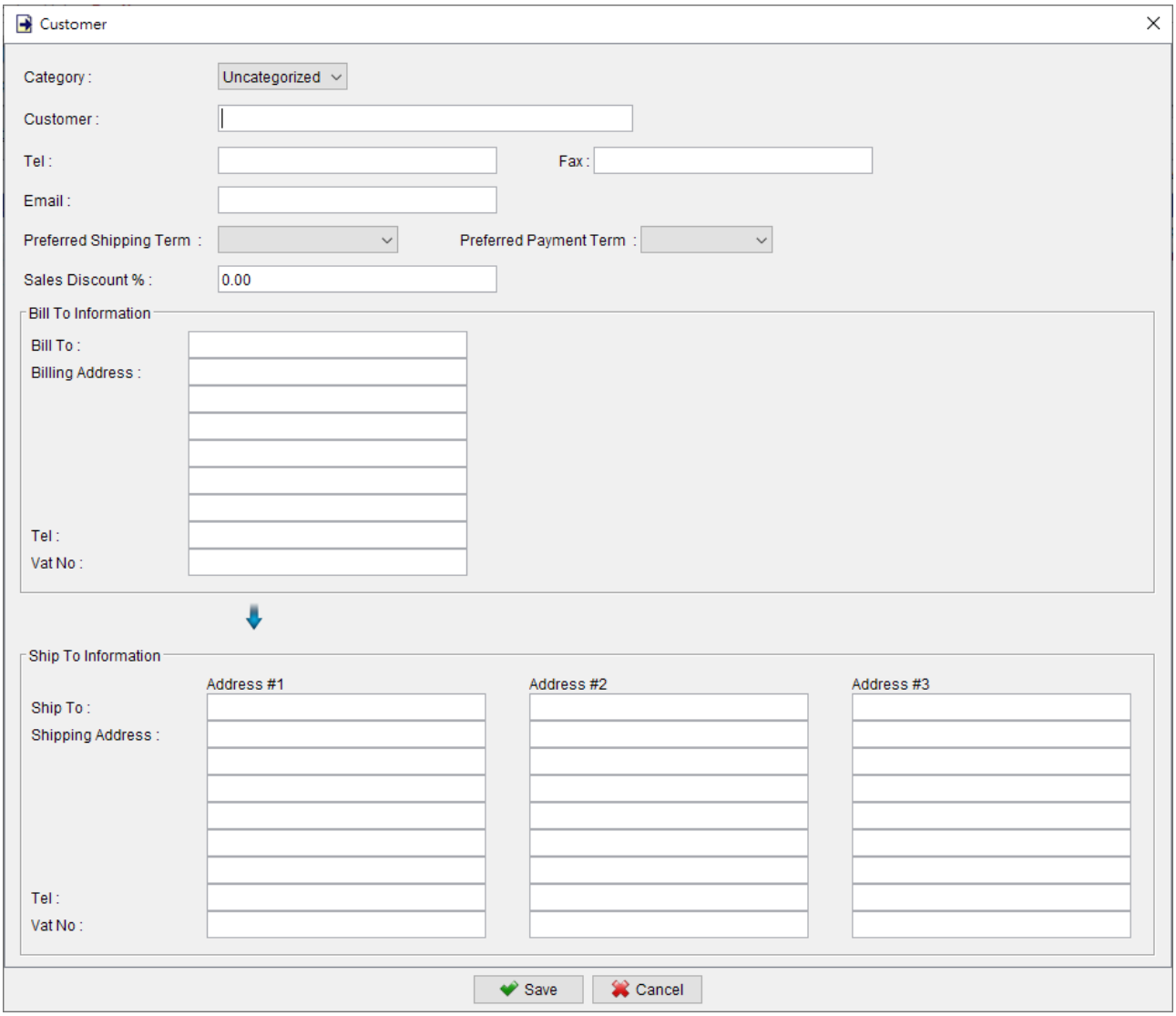
Export – Export customer list into PDF, XLS or HTML

Print Address – Print address on label

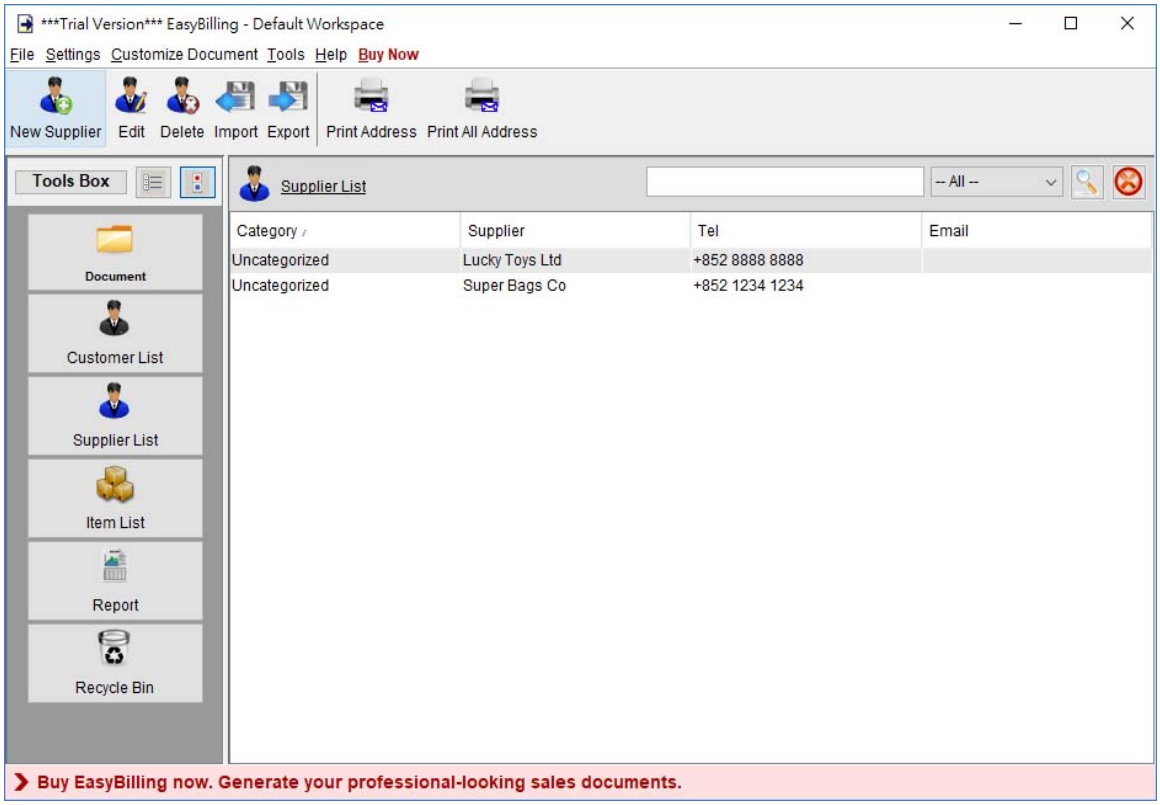
Print All Address – Print address of all customers on label

Customers are listed in the table. User can click on the header to sort the table accordingly. Besides, user can search the customer by using the search box in the upper right corner.

Below is the customer edit window.



6. SUPPLIER LIST



Supplier List provides storage for all supplier information. User can easily manage the supplier information and get the supplier information into the document easily.

Tool Bar

New – Add a new supplier.

Edit – Edit the selected supplier.

Delete – Delete the selected supplier.

Import – Import customer from a XLS file.

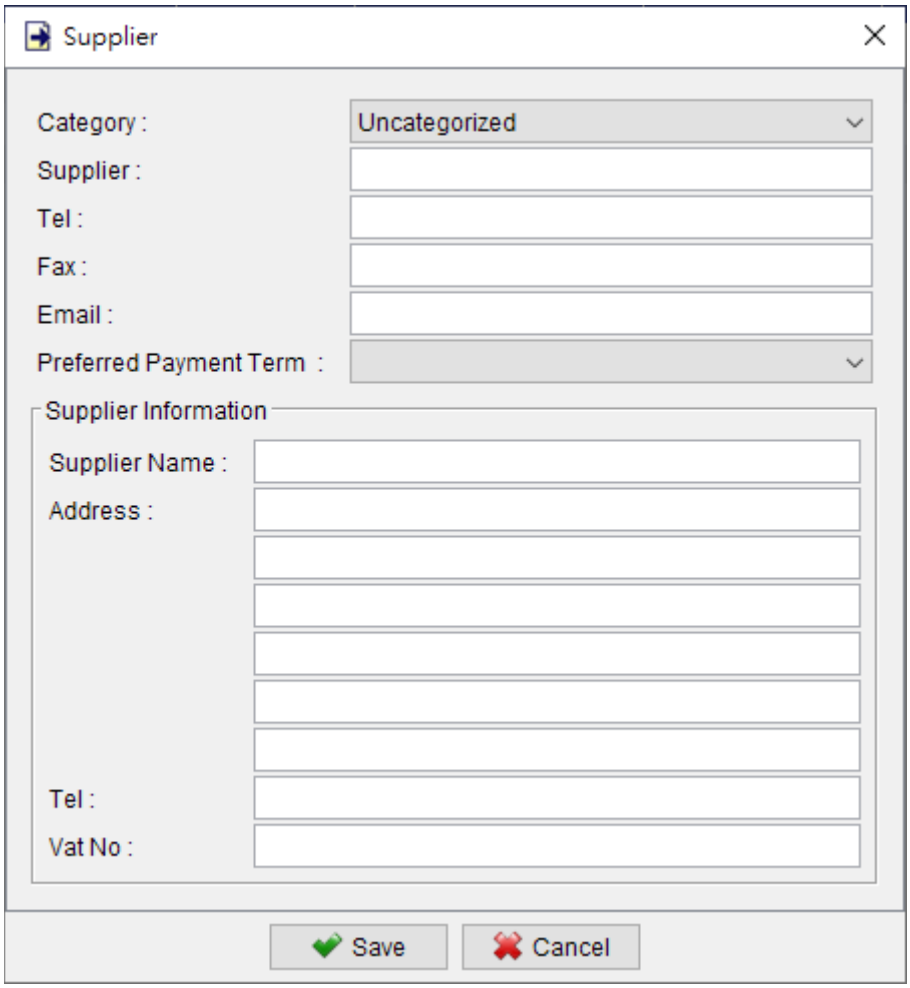
Export – Export customer list into PDF, XLS or HTML

Print Address – Print address on label

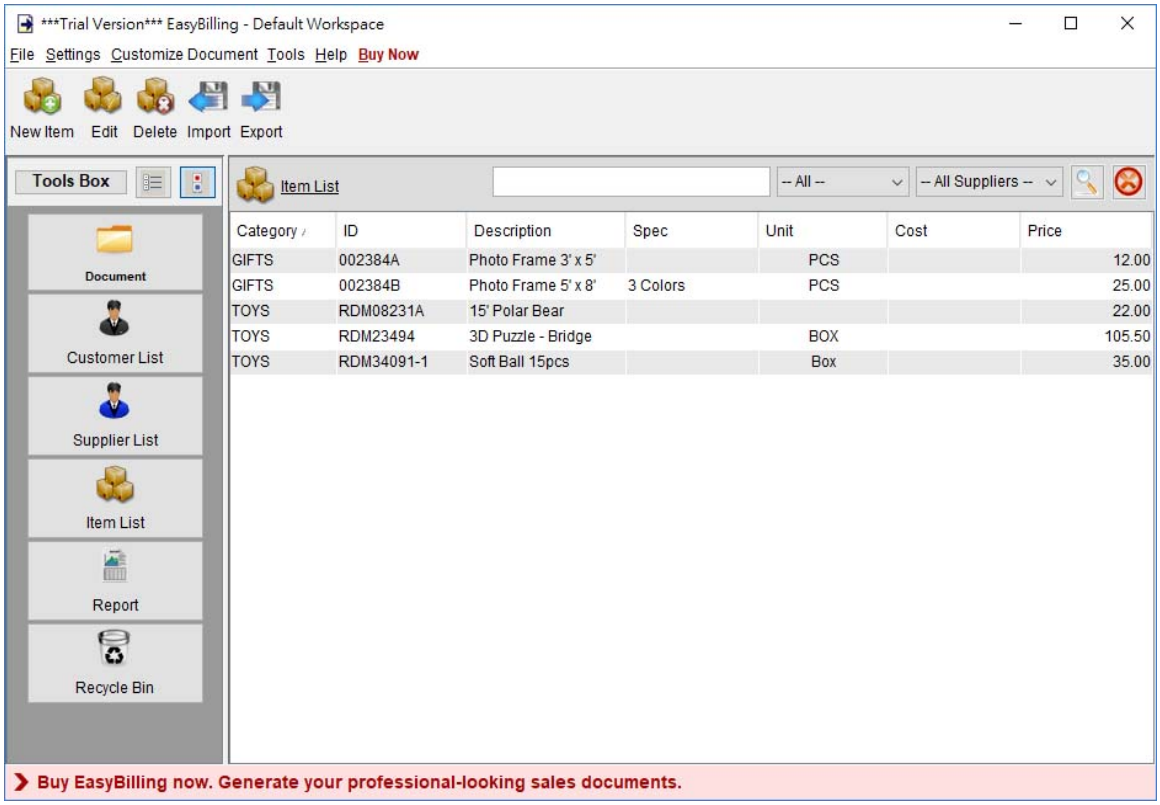
Print All Address – Print address of all suppliers on label

Suppliers are listed in the table. User can click on the header to sort the table accordingly. Besides, user can search the supplier by using the search box in the upper right corner.

Below is the supplier edit window.



7. ITEM LIST



Item List provides storage for all item information. The item information can be easily loaded into document easily.

<u>Tool Bar</u>

New – Add a new item.

Edit – Edit the selected item.

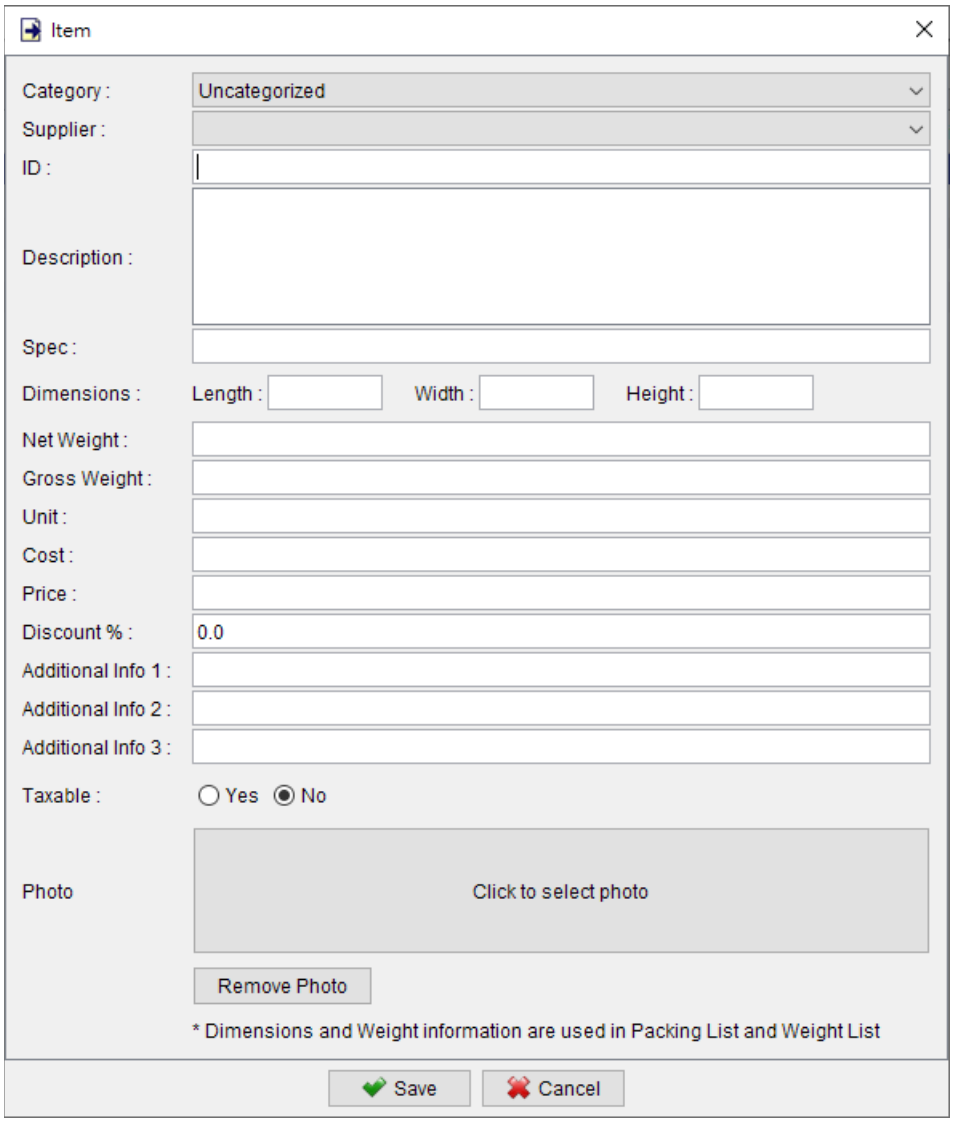
Delete – Delete the selected item.

Import – Import item from a XLS file.

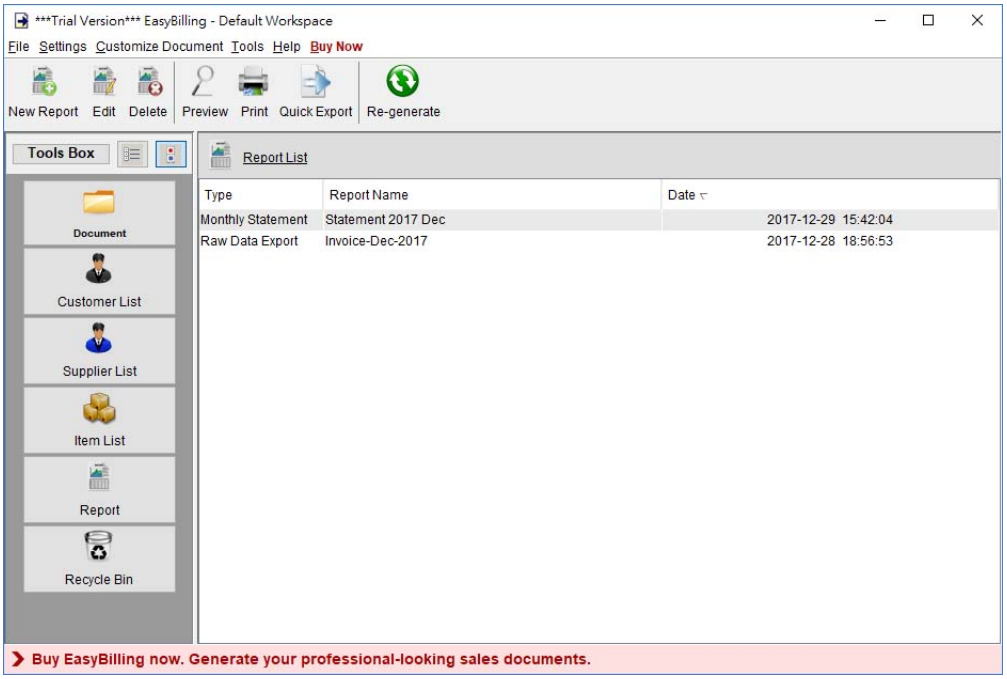
Export – Export item list into PDF, XLS or HTML

The items are listed in the table. User can click on the header to sort the table accordingly. Besides, user can search the item by using the search box in the upper right corner.

Below is the Item edit window.



8. REPORT



The user interface of managing Report is shown above.

The icons in the Tool Bar are New, Edit, Delete, Preview, Print, Quick Export and Re-generate.

New – Create a new report. There are eleven report templates available

- Global Sales Report
- Monthly Sales Report
- Sales Report by Customer
- Global Payment Report
- Monthly Payment Report
- Payment Report by Customer
- Monthly Statement
- Customer Purchase History
- Item Sales Report
- Sales Person Report
- Total Tax Payable Report
- Supplier Report
- Monthly Statement for Supplier
- Raw Data Export

Edit – Edit selected report.

Delete – Delete selected report.

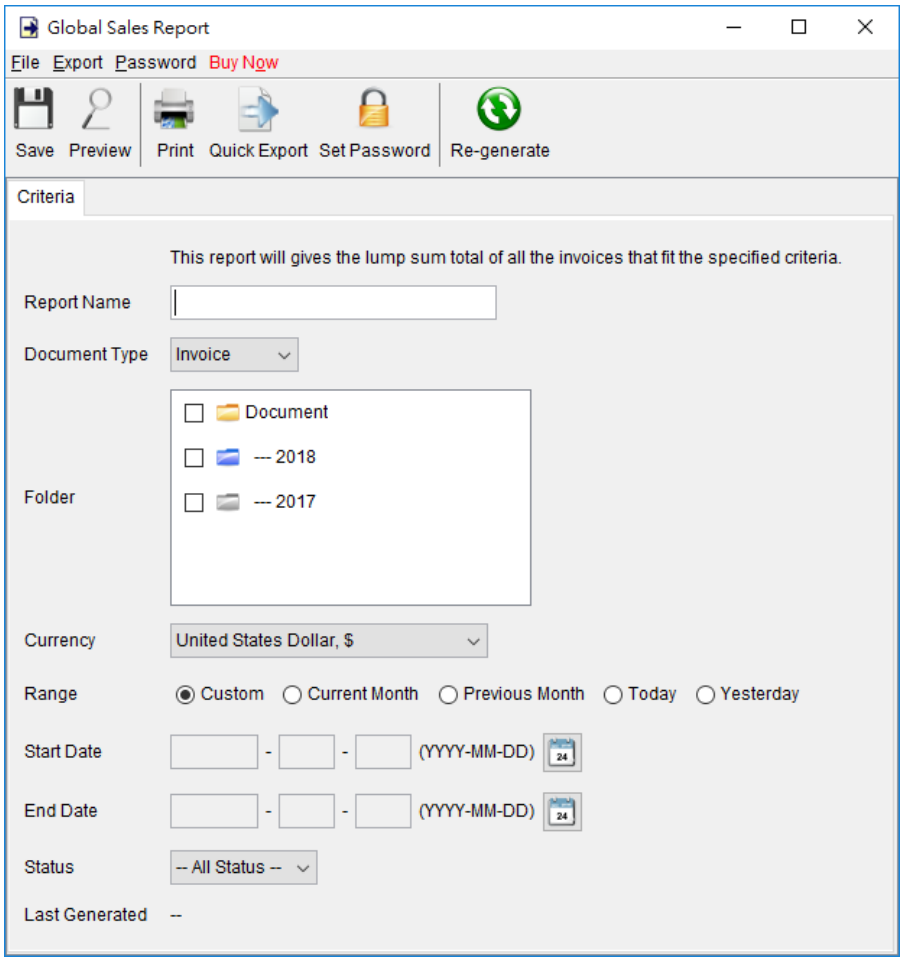
Preview – Preview selected report in PDF format.

Print – Print selected report.

Quick Export – Export the selected report into specific location and format, according to the Quick Export settings.

Re-generate – Collect the latest documents data and re-process the report.

8.1. Global Sales Report



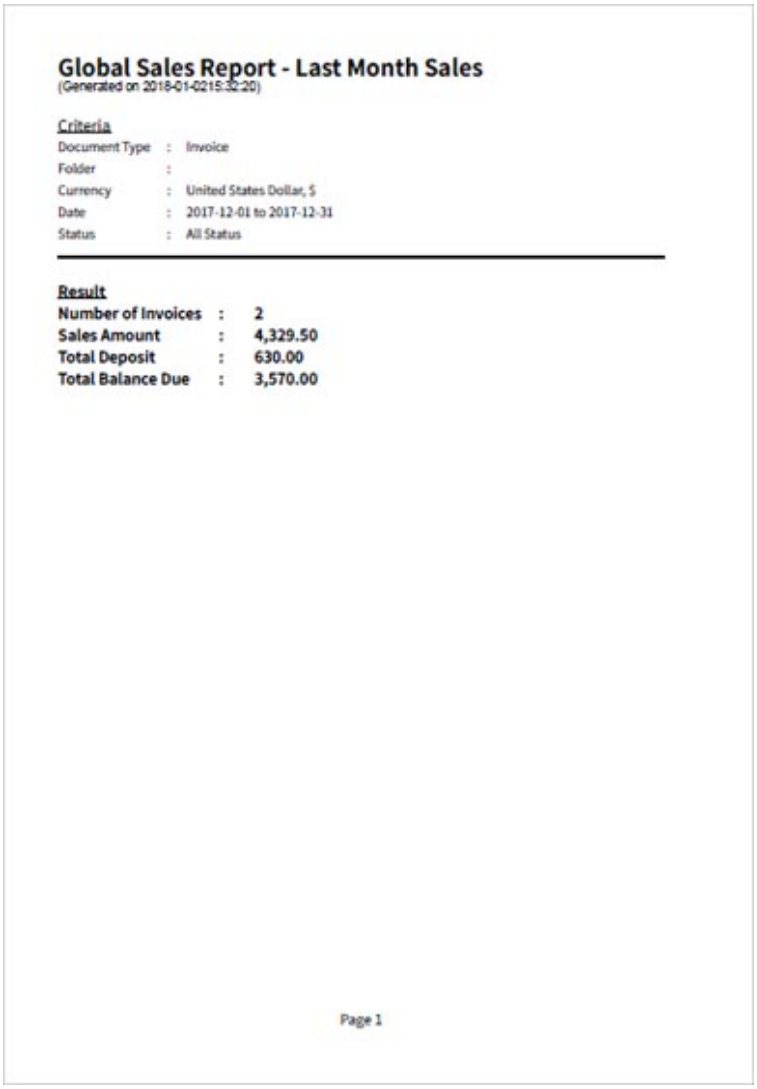
Global sales report provides user overview information on the sales activities, include number of invoice issued, total sales amount, total deposit and total balance due. The report is counted on Invoice or Tax invoice document.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all the invoices under it. Only those invoices dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

Note: The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Global Sales Report is shown below.



Global Sales Report - Last Month Sales
(Generated on 2018-01-02 15:32:20)

Criteria

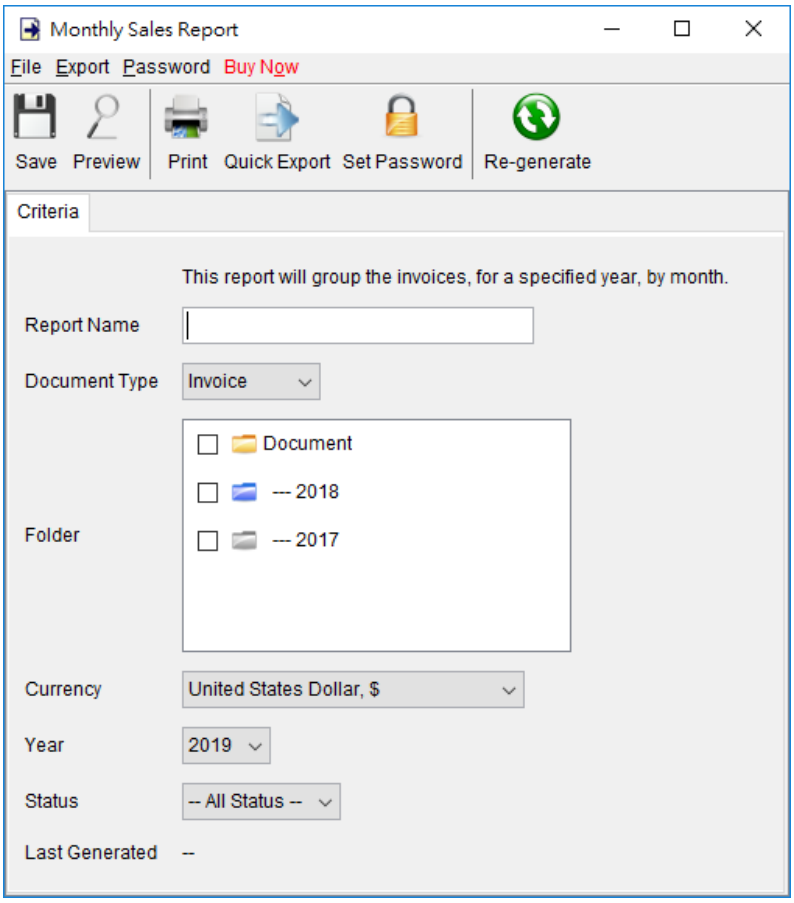
Document Type	:	Invoice
Folder	:	
Currency	:	United States Dollar, $
Date	:	2017-12-01 to 2017-12-31
Status	:	All Status

Result

Number of Invoices	:	**2**
Sales Amount	:	**4,329.50**
Total Deposit	:	**630.00**
Total Balance Due	:	**3,570.00**

Page 1

8.2. Monthly Sales Report



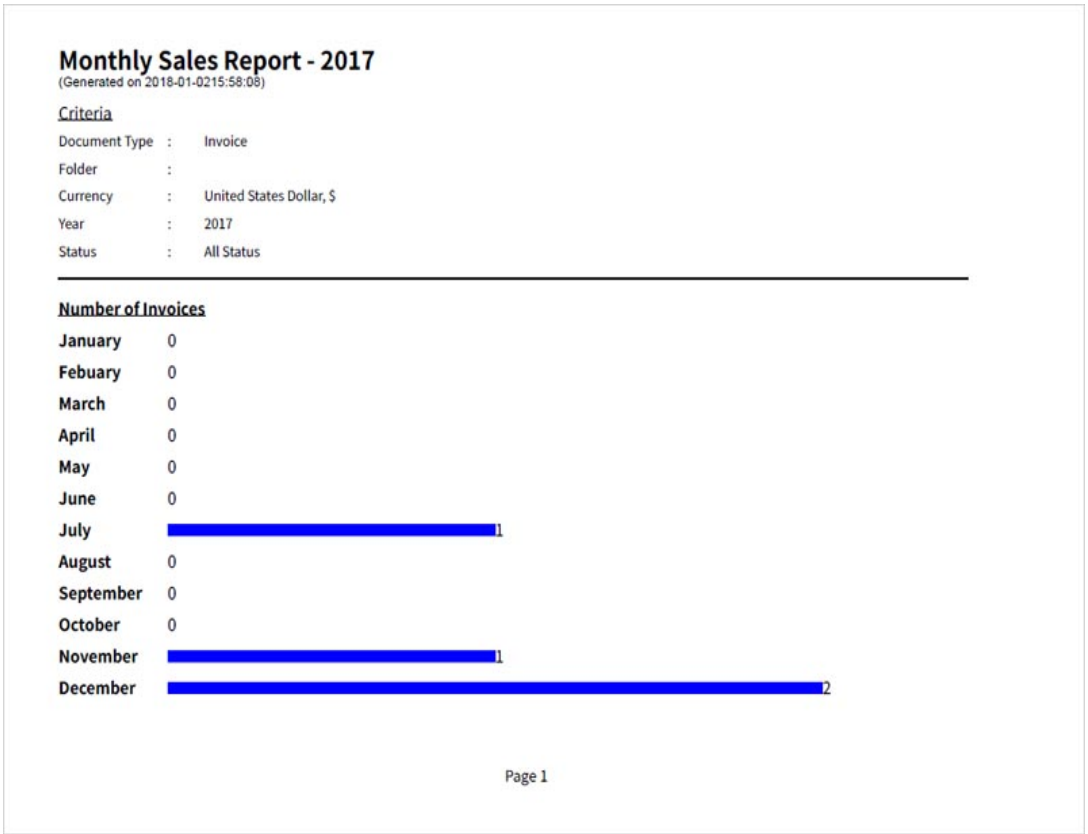
Monthly sales report provides sales information on monthly basis in graphical format. It shows the number of invoices issued and total sales amount.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all the invoices under it. Only those invoices dated in the selected "Year" will be get into calculation.

Note: The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Monthly Sales Report is shown below.



Monthly Sales Report - 2017
(Generated on 2018-01-0215:58:08)

Criteria

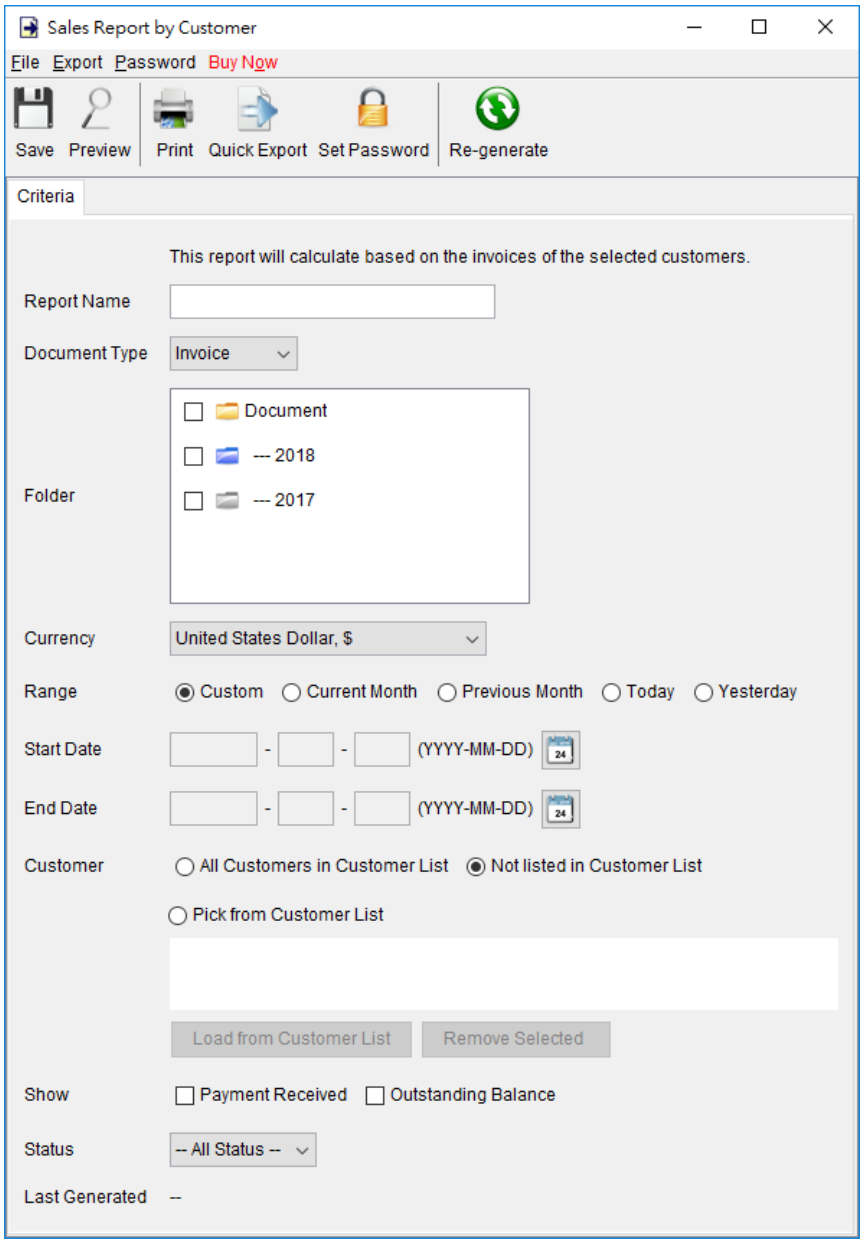
Document Type	:	Invoice
Folder	:	
Currency	:	United States Dollar, $
Year	:	2017
Status	:	All Status

Number of Invoices

January	0
Febuary	0
March	0
April	0
May	0
June	0
July	1
August	0
September	0
October	0
November	1
December	2

Page 1

8.3. Sales Report by Customer



Sales report by Customer gives details sales information on a specify customer, include number of invoice issued, total sales amount, total deposit and total balance due.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all the invoices under it. Only those Invoices dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

User needs to specify which customers to be listed in the report. Optional Payment Received and Outstanding Balance information can be shown out in the report.

Note: The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Sales Report by Customer is shown below.

Customer Sales Report - 2017 DEC
(Generated on 2018-01-0216:18:45)

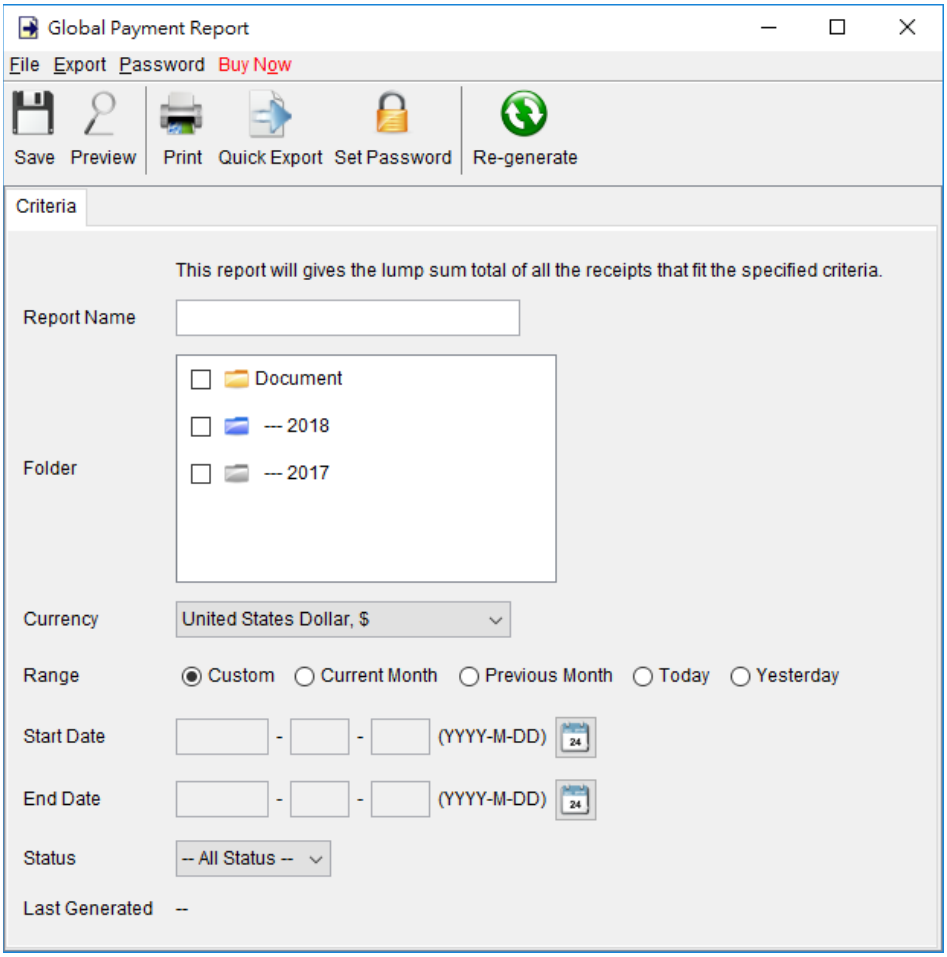
Criteria

Document Type	:	Invoice
Folder	:	Document
Currency	:	United States Dollar, $
Date	:	2017-12-01 to 2017-12-31
Customers	:	Not listed in Customer List.
Status	:	All Status

Customer	Number of Invoices	Sales Amount	Total Deposit	Total Balance Due
EVS	1	4,200.00	630.00	3,570.00
Robert Lee	1	129.50	0.00	0.00

Page 1

8.4. Global Payment Report



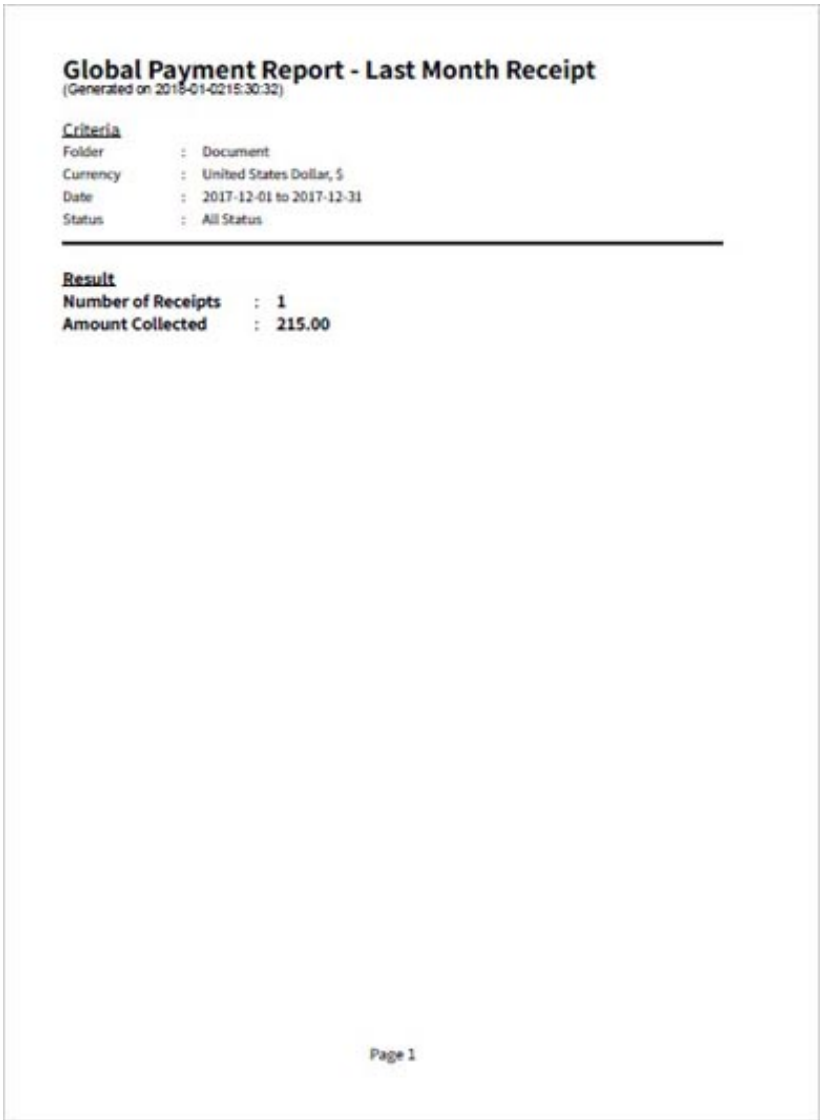
Global Payment report provides user overview information on the payment activities; include number of receipt issued, and amount collected. The report is counted on Receipt document.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all receipts under it. Only those receipts dated between the "Start Date" and "End Date" will be getting into accounted. User can leave the date field blank if there is no limitation on the period.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Global Payment Report is shown below.



Global Payment Report - Last Month Receipt
(Generated on 2018-01-0215:30:32)

Criteria

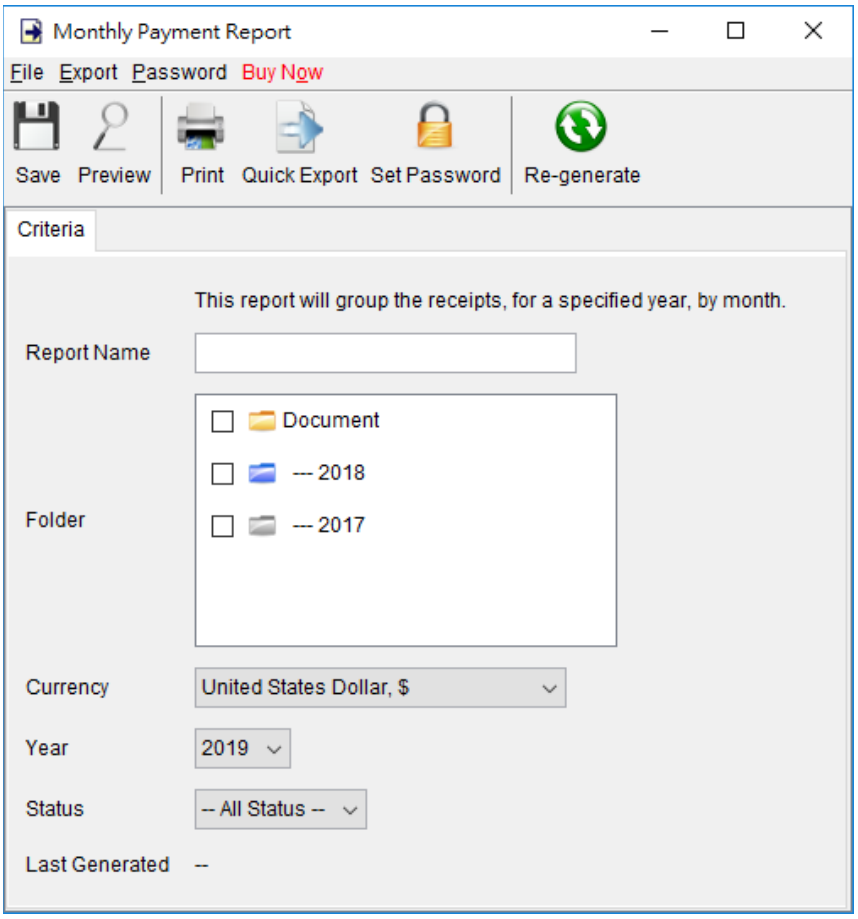
Folder	:	Document
Currency	:	United States Dollar, $
Date	:	2017-12-01 to 2017-12-31
Status	:	All Status

Result

Number of Receipts	:	**1**
Amount Collected	:	**215.00**

Page 1

8.5. Monthly Payment Report



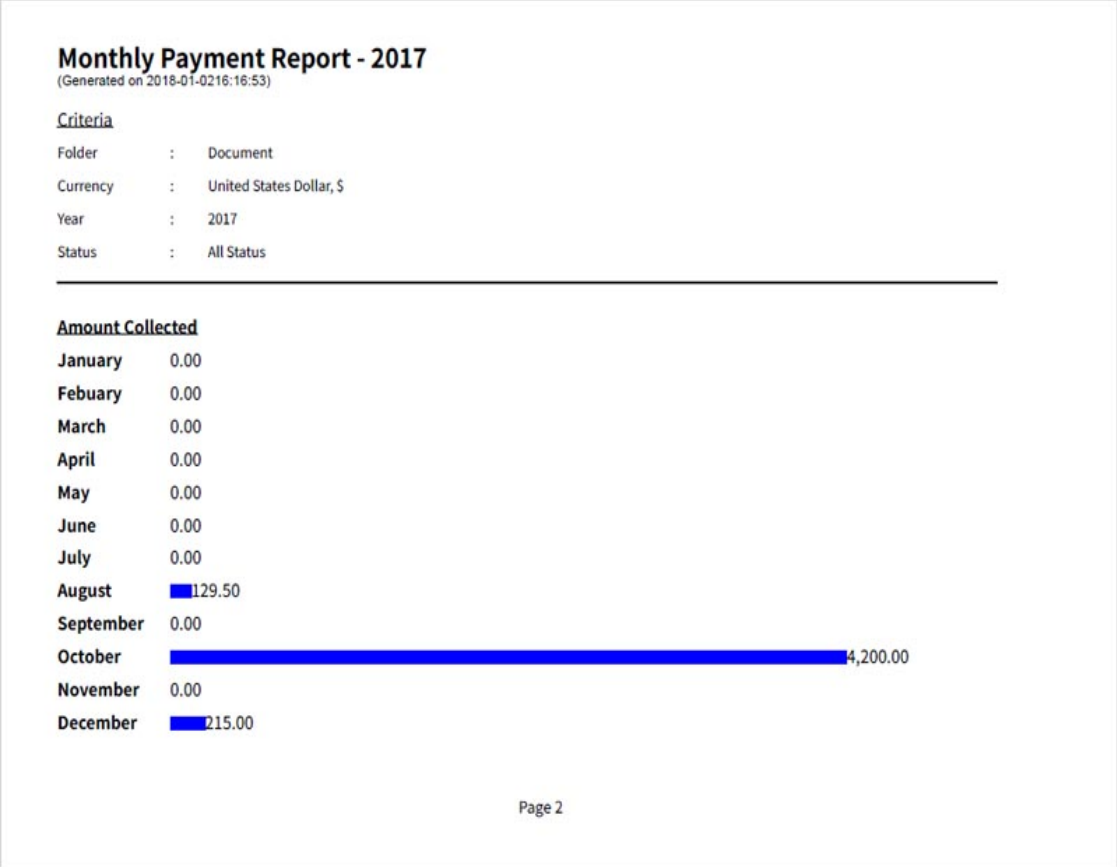
Monthly Payment report provides payment information on monthly basis in graphical format. It shows the number of receipts issued and total amount collected.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all receipts under it. Only those receipts dated in the selected "Year" will be get into calculation.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Monthly Payment Report is shown below.



Monthly Payment Report - 2017
(Generated on 2018-01-0216:16:53)

Criteria

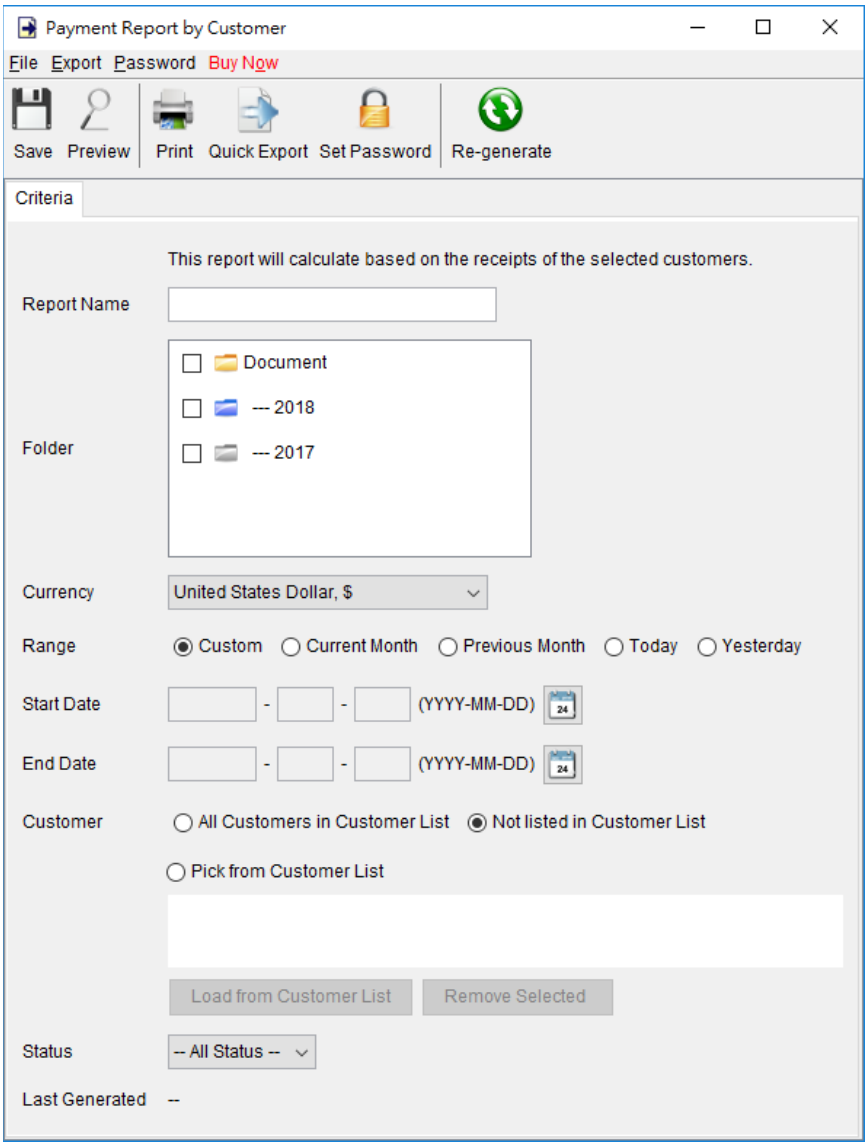
Folder	:	Document
Currency	:	United States Dollar, $
Year	:	2017
Status	:	All Status

Amount Collected

January	0.00
Febuary	0.00
March	0.00
April	0.00
May	0.00
June	0.00
July	0.00
August	129.50
September	0.00
October	4,200.00
November	0.00
December	215.00

Page 2

8.6. Payment Report by Customer



Payment report by Customer gives details payment information on a specify customer, include number of receipts issued and total amount collected.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all the receipts under it. Only those invoices dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

User needs to specify which customers to be listed in the report.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Payment Report by Customer is shown below.

Customer Payment Report - 2017 Dec
(Generated on 2018-01-0216:19:20)

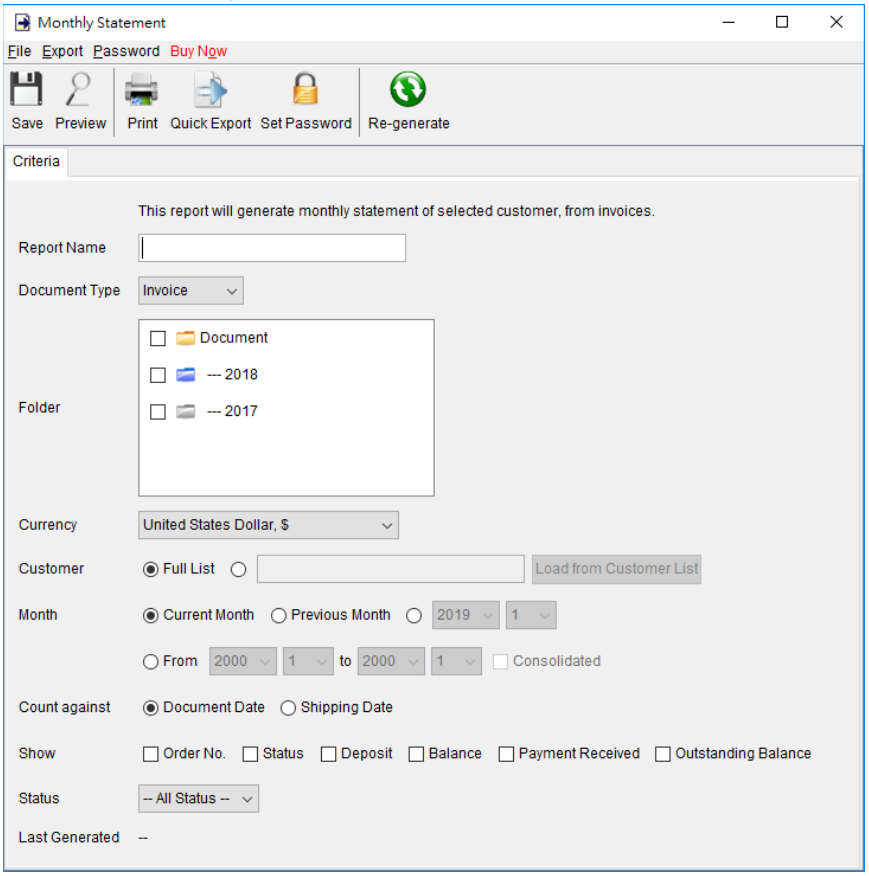
Criteria

Folder	:	Document
Currency	:	United States Dollar, $
Date	:	2017-12-01 to 2017-12-31
Customers	:	Not listed in Customer List.
Status	:	All Status

Customer	Number of Receipts	Total	Deposit	Balance Due
Evinco Solutions Limited	1	215.00	100.00	115.00

Page 1

8.7. Monthly Statement



This report generate monthly statement for selected customer, from invoice or Tax Invoice.

User needs to provide a report name for the report.

It allows to generate Monthly Statement for Full Customer List or a single customer. Monthly Statement can be set on a specific month or for a time period. It can be counted against on Document Date or Shipping Date. Optional fields can be selected to shown in the monthly statement.

Note:: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample PDF output of Monthly Statement is shown below.

Evinco Solutions Limited
- Provides Innovative Business Software

Unit 2202, Causeway Bay Plaza I
489 Hennessy Road
Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588
Email: info@evinco-software.com
Website: https://www.evinco-software.com

Monthly Statement

Customer

Evinco Solutions Limited
Unit 2202 Causeway Bay Plaza I
489 Hennessy Road
Causeway Bay
Hong Kong

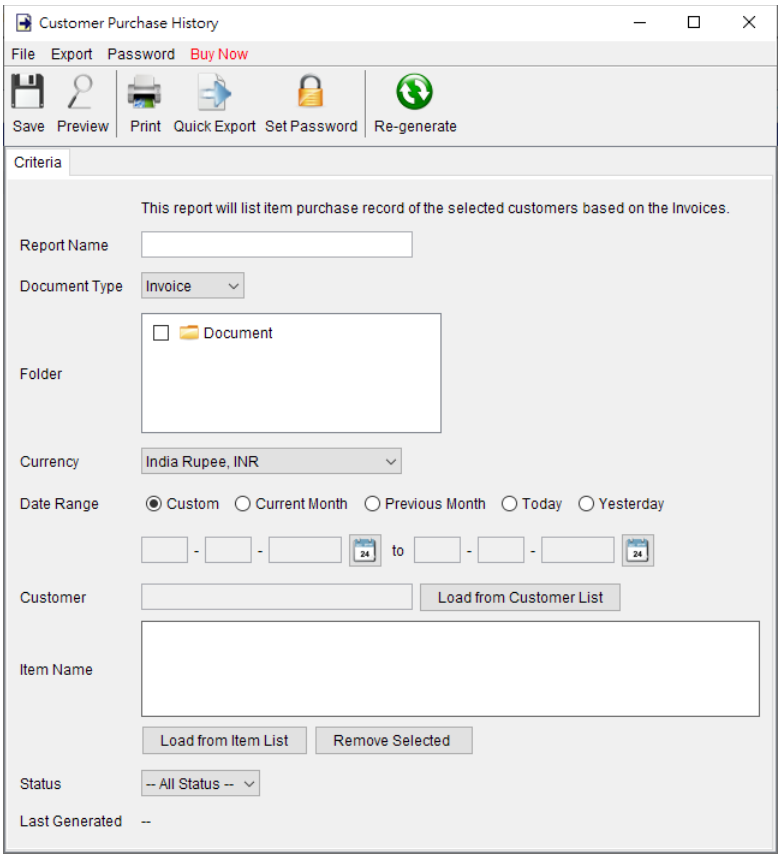
For Month	2017-12	Currency	United States Dollar, $
Document Type	Invoice	Status	All Status

Date	Invoice Number	Total	Deposit	Balance Due
2017-12-08	10001	211.50	–	–
2017-12-15	10000	152.50	–	–
2017-12-26	INV156714	4,200.00	630.00	3,570.00
	Total	4,564.00	630.00	3,570.00

Page 1

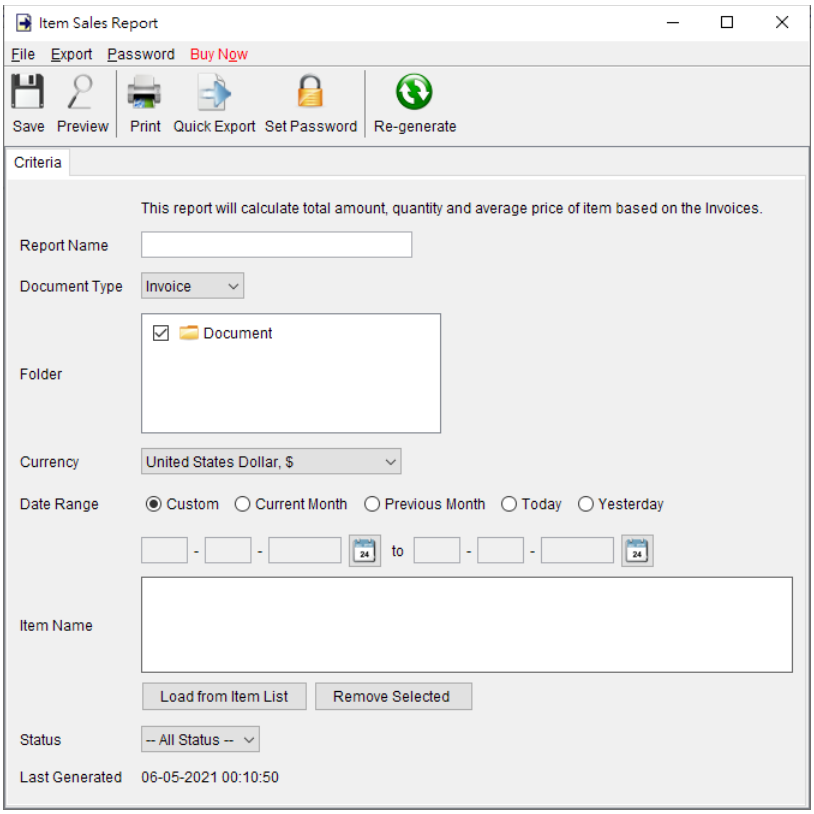
8.8. Customer Purchase History

Customer Purchase History will list the item purchase history of the selected customers. It will list out the document number, quantity, unit price and amount.



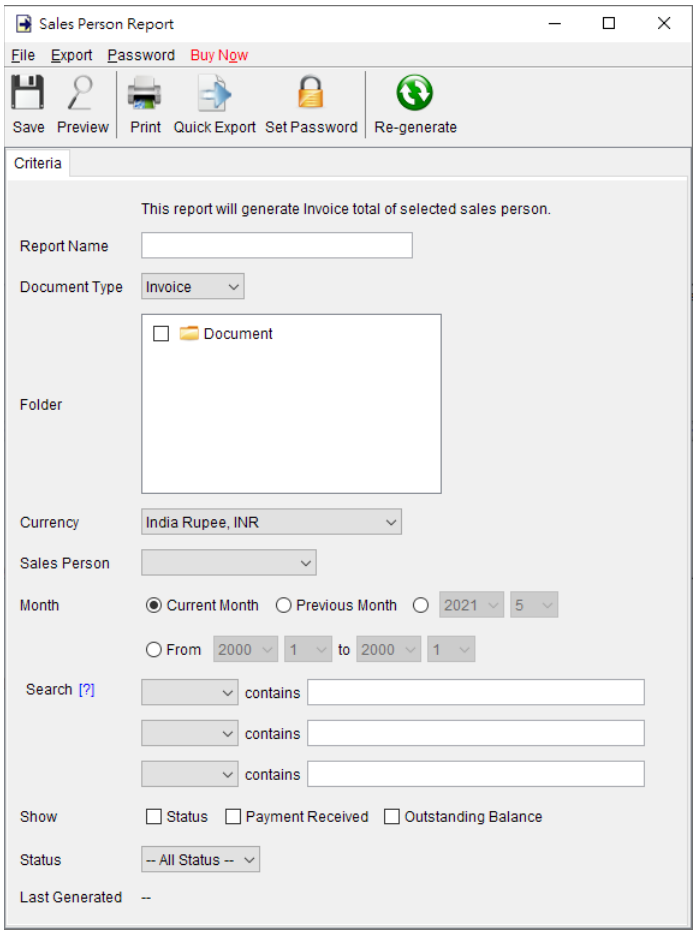
8.9. Item Sales Report

Item Sales Report shows total amount, quantity and average price of the selected item from the invoices.

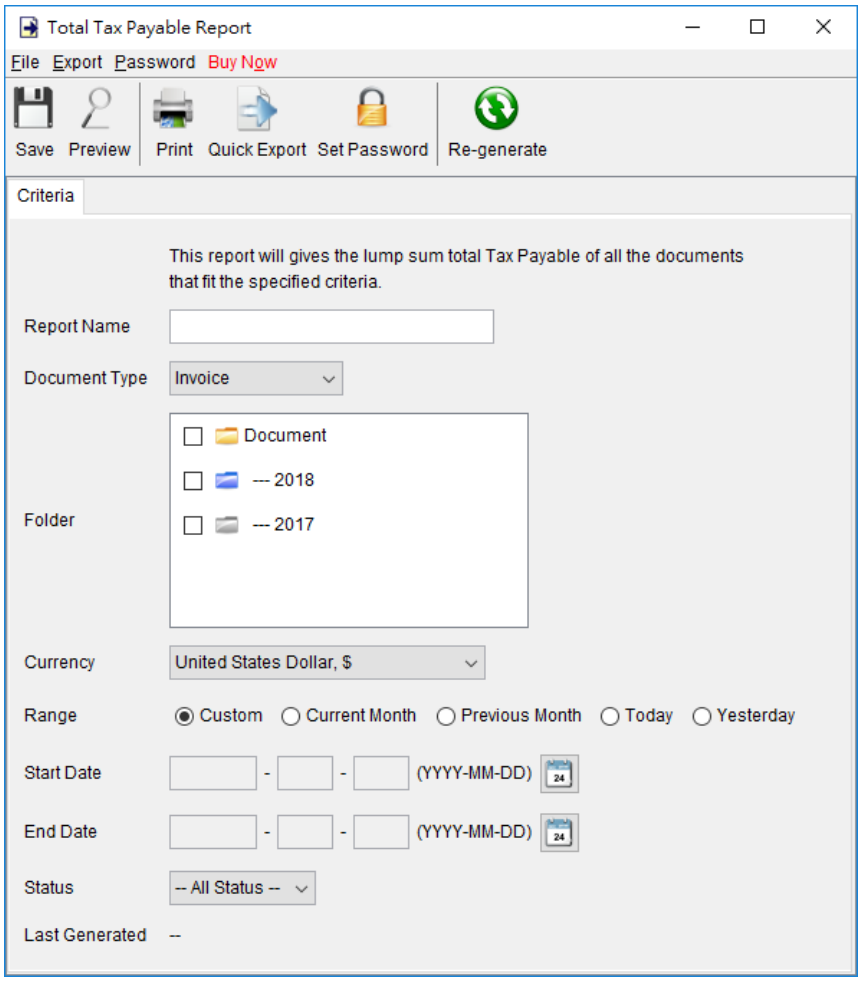


8.10. Sales Person Report

This report will calculated the total amount of invoices of selected sales person.



8.11. Total Tax Payable Report



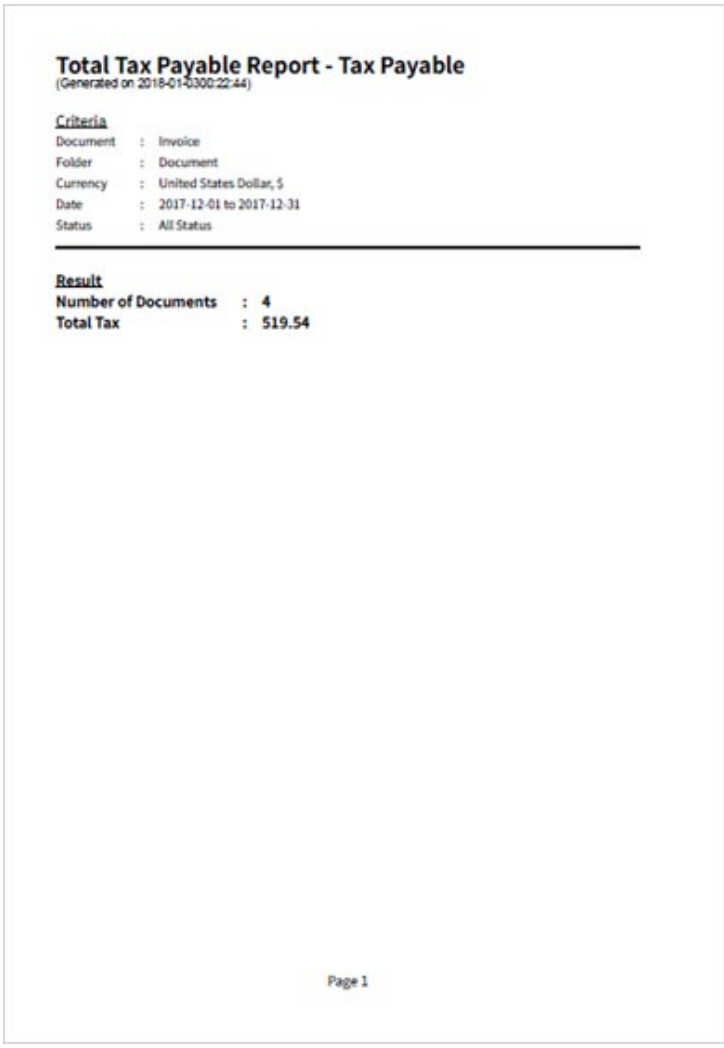
Total Tax Payable Report shows the tax payable of selected documents that fits the specific requirements.

User needs to provide a report name for the report.

The report will run against the selected folder and retrieve all the specified documents under it. Only those documents dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Total Tax Payable Report is shown below.



Total Tax Payable Report - Tax Payable
(Generated on 2018-01-0300:22:44)

Criteria

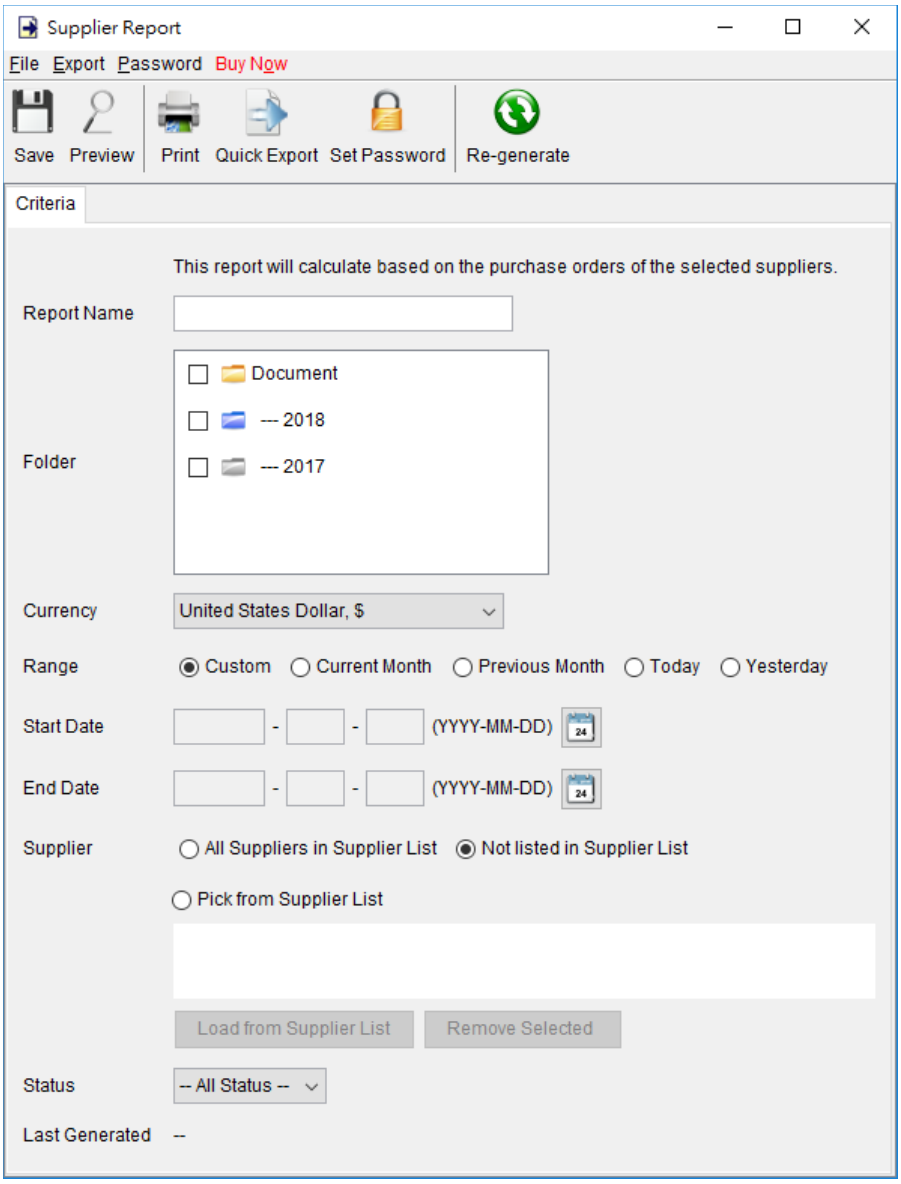
Document	:	Invoice
Folder	:	Document
Currency	:	United States Dollar, $
Date	:	2017-12-01 to 2017-12-31
Status	:	All Status

Result

Number of Documents	:	**4**
Total Tax	:	**519.54**

Page 1

8.12. Supplier Report



This report will show the number of purchase order and total amount of the selected suppliers.

User needs to provide a report name for the report.

Only those Purchase Orders dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period. User needs to specify which suppliers to be listed in the report.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Supplier Report is shown below.

Supplier Report - 2018
(Generated on 2018-01-0300:27:17)

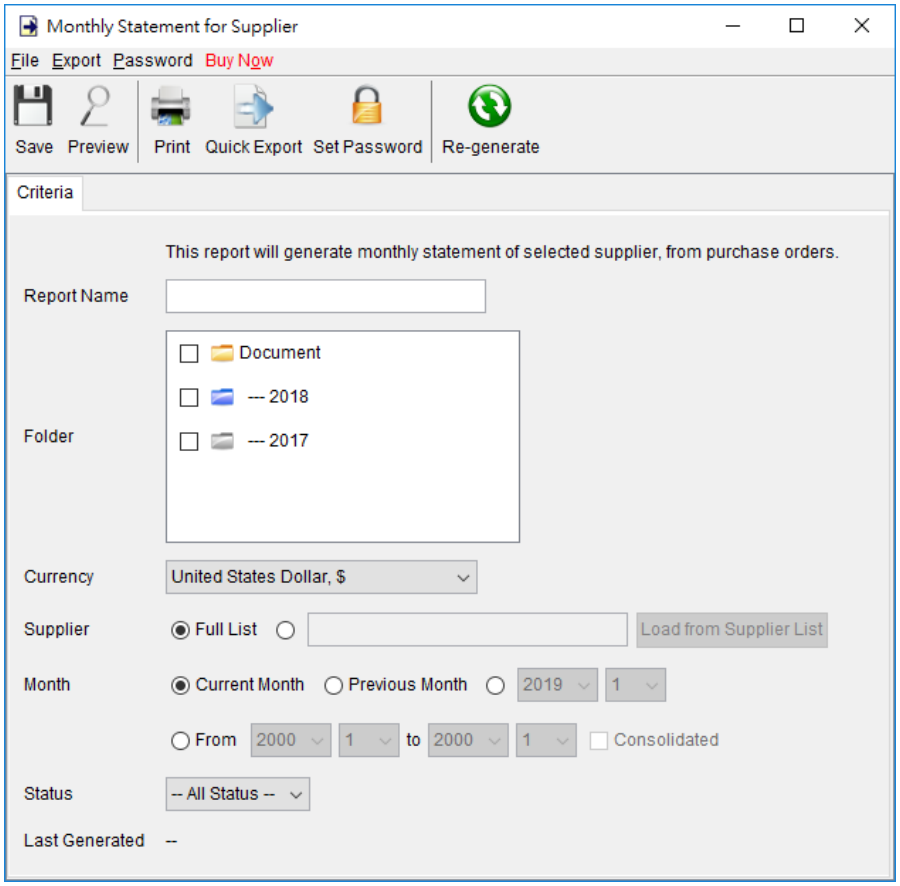
Criteria

Folder	:	
Currency	:	United States Dollar, $
Date	:	2018-01-01 to 2018-01-31
Suppliers	:	Evinco Solutions Limited
Status	:	All Status

Supplier	Number of Purchase Orders	Total Amount
Evinco Solutions Limited	2	7,238.50

Page 1

8.13. Monthly Statement for Supplier



This report generate monthly statement for selected supplier, from Purchase Order.

User needs to provide a report name for the report.

It allows to generate Monthly Statement for Full Supplier List or a single supplier. Only those Purchase Orders dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

Note: - The report calculation will be updated when it is saved. The updated time is shown as the "Last Generated". User can also click [Re-generate] button to process the report calculation again.

The sample output of Monthly Statement for Supplier is given below.

Evinco Solutions Limited
- Provides Innovative Business Software

Unit 2202, Causeway Bay Plaza I
489 Hennessy Road
Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588
Email: info@evinco-software.com
Website: https://www.evinco-software.com

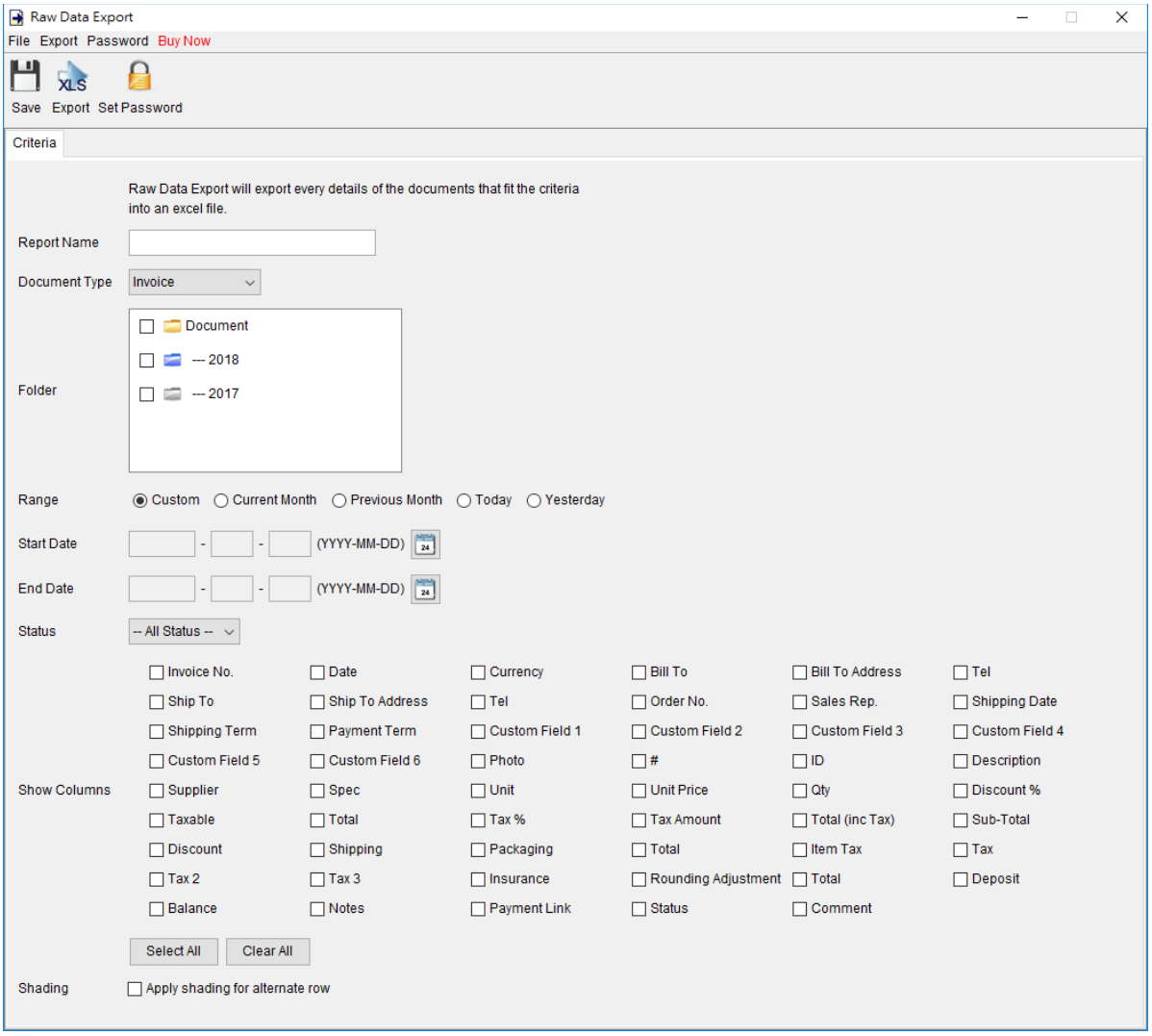
Monthly Statement
for Supplier

For Month	2018-01
Currency	United States Dollar, $
Status	All Status

Date	Purchase Order Number (Supplier)	Total
2018-01-03	10000 (Evinco Solutions Limited)	1,781.75
2018-01-03	10001 (Evinco Solutions Limited)	5,456.75
	Total	7,238.50

Page 1

8.14. Raw Data Export



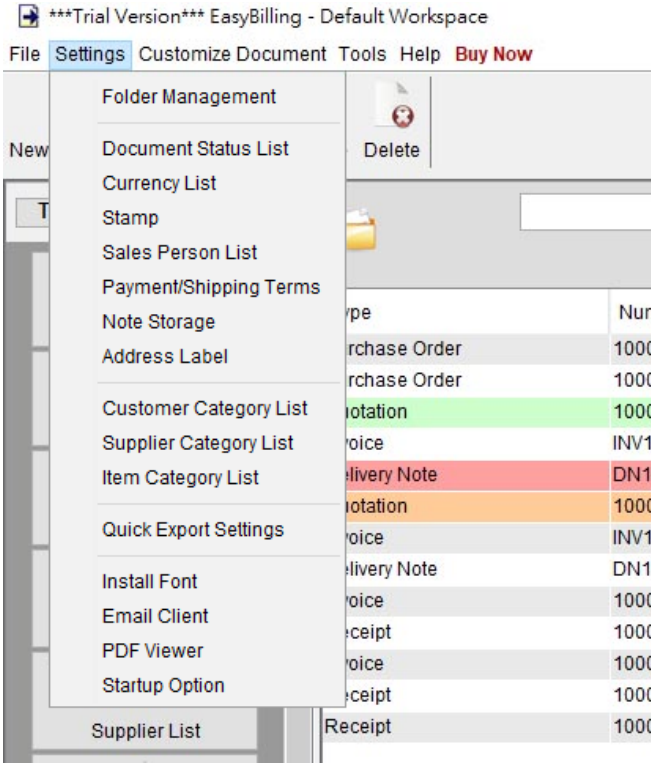
Raw Data Export allows user to get details information of the document created in EasyBilling.

User needs to provide a report name for the report. The report will retrieve all selected documents in the selected folder. Only those documents dated between the "Start Date" and "End Date" will be getting into calculation. User can leave the date field blank if there is no limitation on the period.

Check the box to select the fields of the document and shown in the report.

Note: If any line item column is selected, the document will be spanned as multiple rows according to the number of line items.

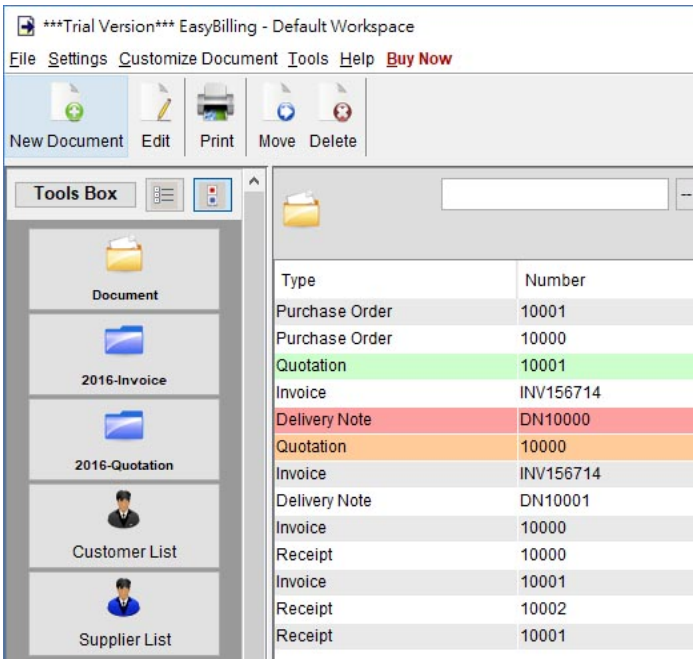
9. SETTINGS



User can configure EasyBilling by adjust different settings easily.

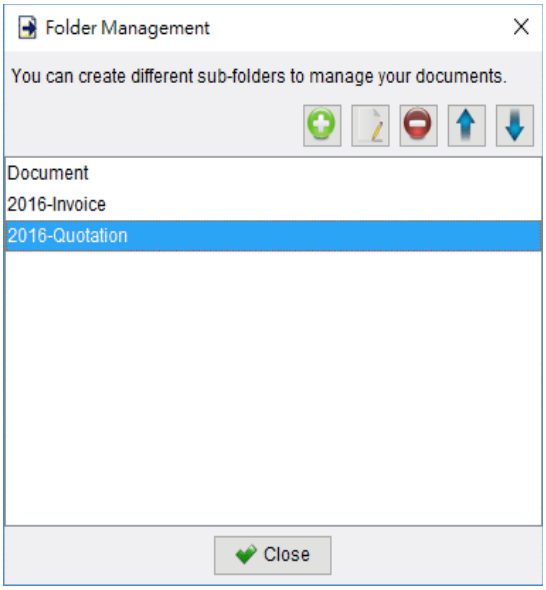
- Folder Management
- Document Status List
- Currency List
- Stamp
- Sales Person List
- Payment/Shipping Terms
- Notes Storage
- Address Label
- Customer Category List
- Supplier Category List
- Item Category List
- Quick Export Settings
- Install Font
- Email Client
- PDF Viewer
- Startup Option

9.1. Folder Management



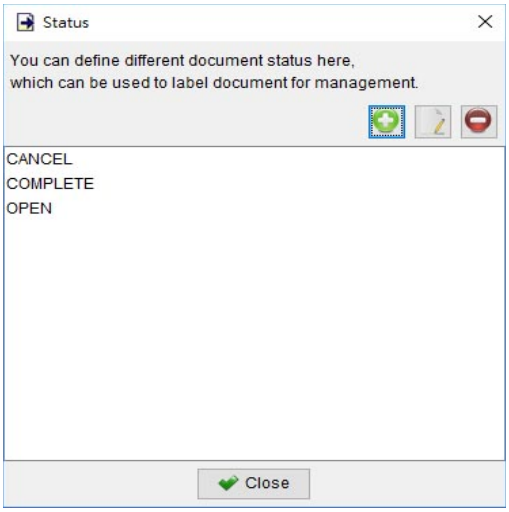
In EasyBilling, by default, there is one folder called "Document". But user can create other folders to organize the documents. EasyBilling supports one lever sub-folder, user can create sub-folder under another folder.

To maintain the list, click the icon to add, edit and remove. Click the arrow buttons to move the folder upwards or downwards. In the screen capture, there are two more folders "2016-Invoice" and "2016-Quotation".



9.2. Document Status List

Documents in EasyBilling can be marked with a status. User can maintain this Document Status List here. Click icon at the top-right corner to add, edit or delete status.



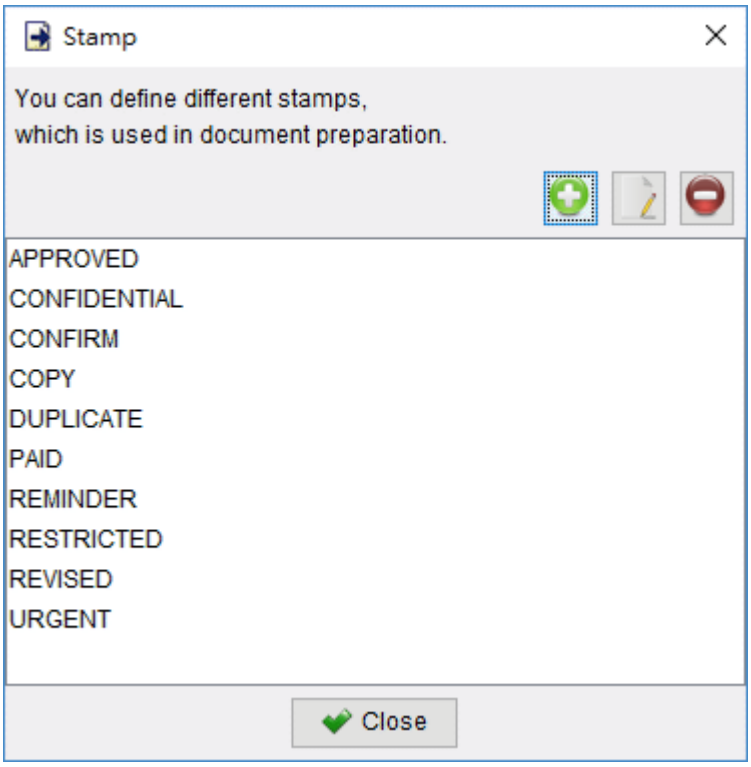
9.3. Currency List

In EasyBilling, document can be set with different currencies. User can maintain Currency List here. Click icon at the top-right corner to add, edit or delete currency.

9.4. Stamp

In EasyBilling, document can be added with a red stamp to indicate the important mark. For example, the above quotation is marked with a "APPROVED" stamp.

User can maintain your own Stamp list, which can be added on the document.

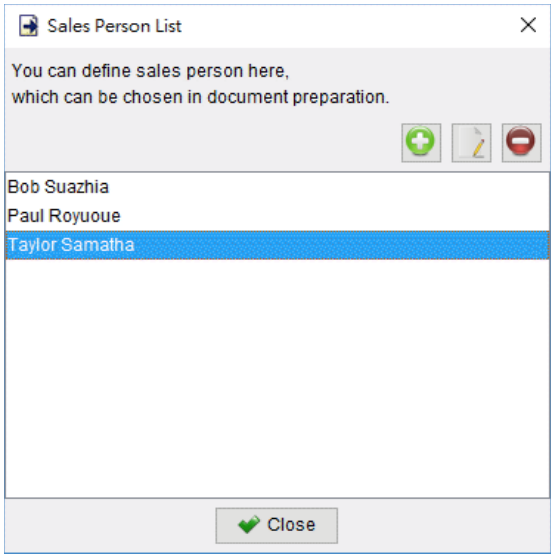


To maintain the list, click the icon at the top-right corner to add, edit and delete. By default, it has

- APPROVED
- CONFIDENTIAL
- CONFIRM
- COPY
- DUPLICATE
- REMINDER
- REVISED
- RESTRICTED
- URGENT

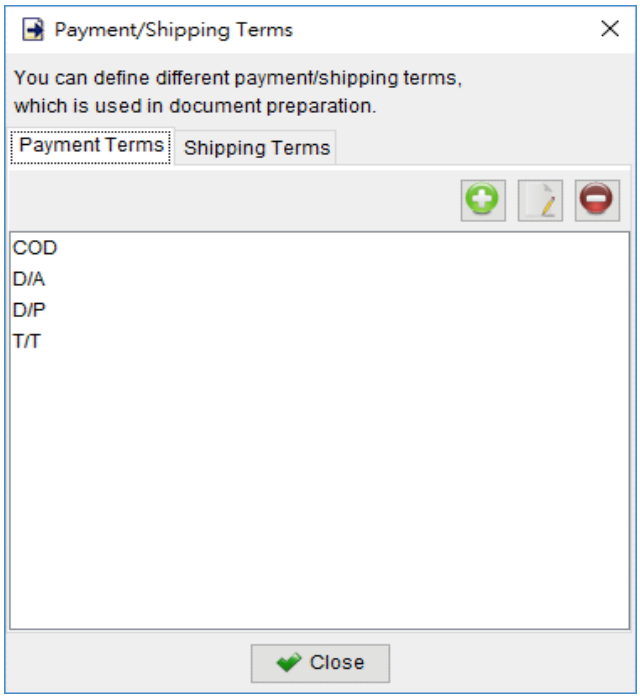
9.5. Sales Person List

User can maintain your own Sales Person list, which can be chosen when preparing document. To maintain the list, click the icon at the top-right corner to add, edit or delete.



9.6. Payment/Shipping Terms

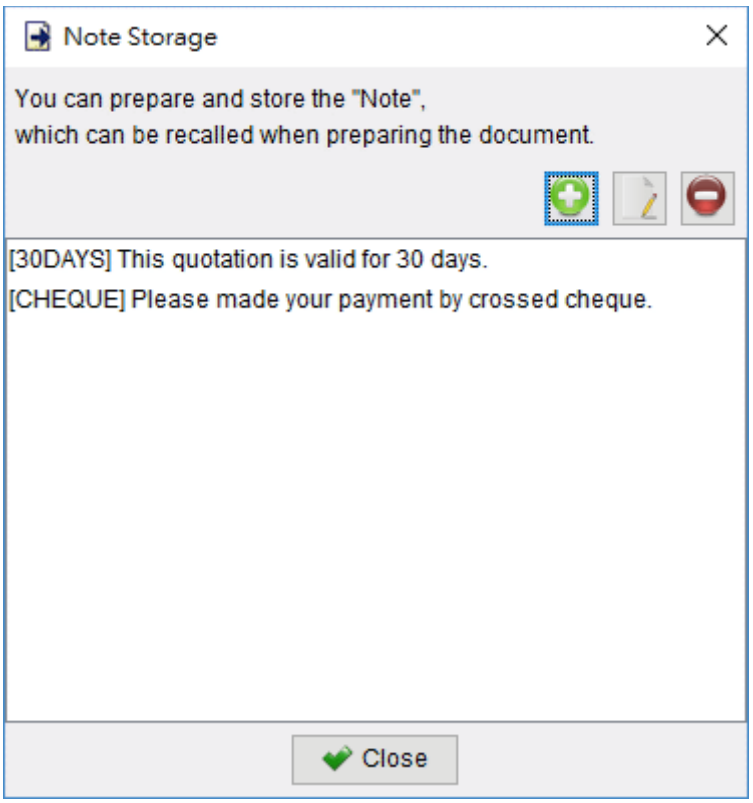
Payment Terms and Shipping Terms are listed here. User can click icon at the top-right corner to add, edit or delete. When preparing document, user can choose the terms from this list.



9.7. Notes Storage

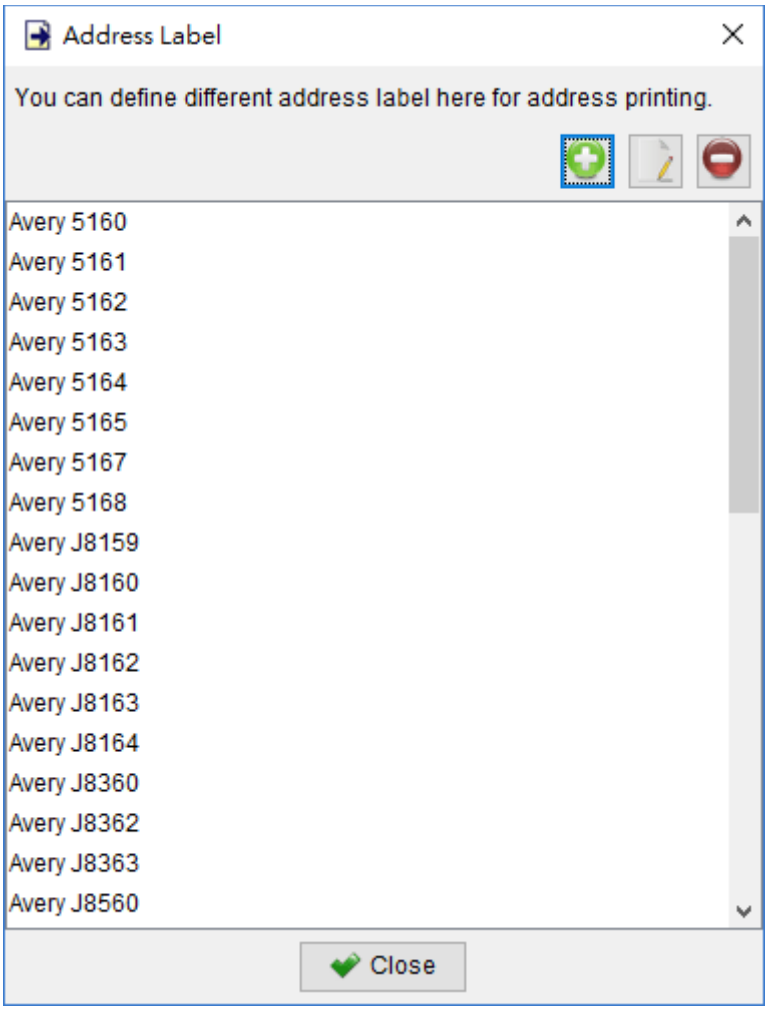
When preparing document, user can load the notes directly from this Notes Storage.

User can maintain your notes here. Click the icon at the top-right corner to add, edit and delete. The format will be preserved as what you typed in.



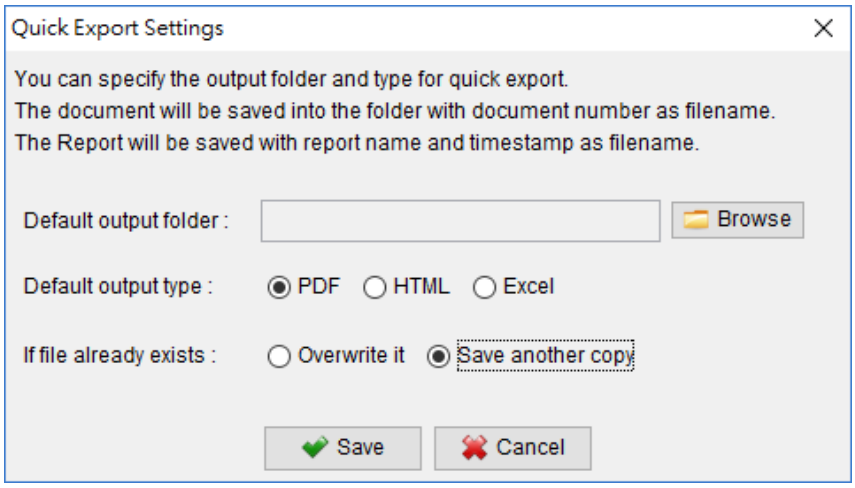
9.8. Address Label

User can create your own Address Label, which can be used in printing customer address. EasyBilling has already built with several common address labels.



9.9. Quick Export Settings

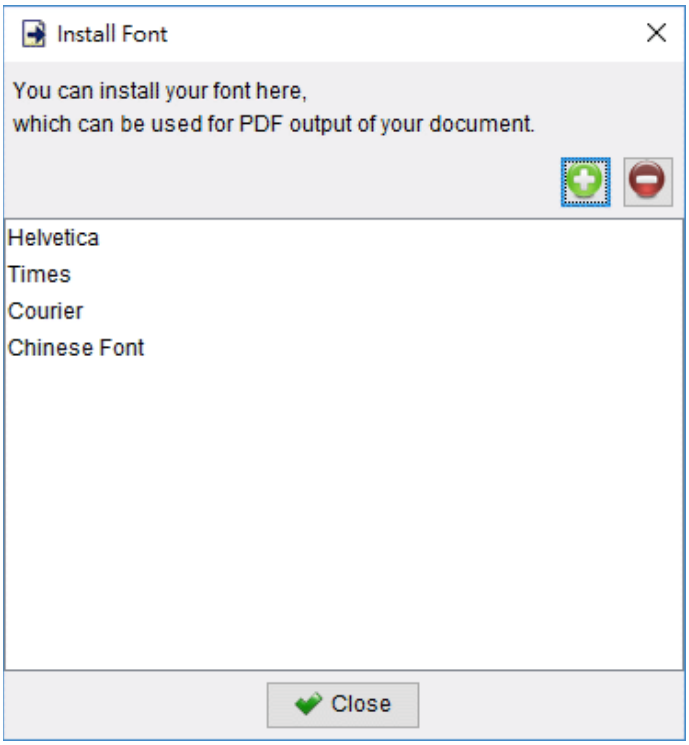
In document or report windows, there is a [Quick Export] button. User can click on it to export the document or report into chosen folder location. User can specify Folder location and Export type for quick export here. User can choose to overwrite or save another copy if file already exists.

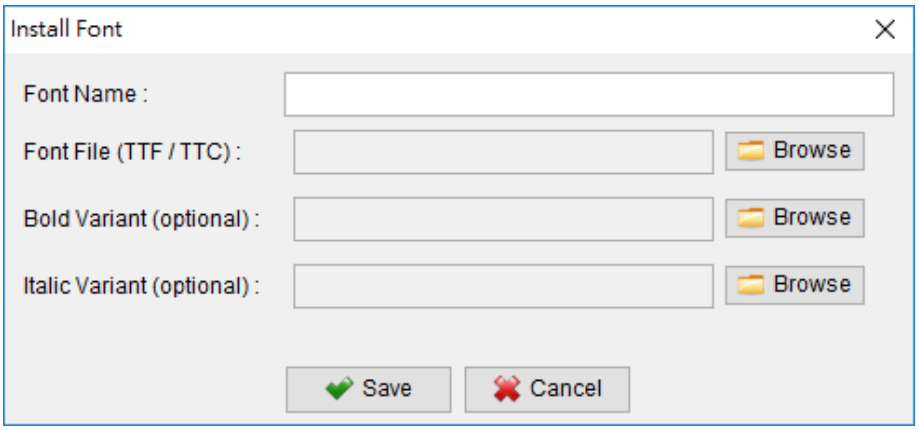


9.10. Install Font

Besides the four built-in fonts, you can install your own font into EasyBilling. It supports TTC or TTF format.

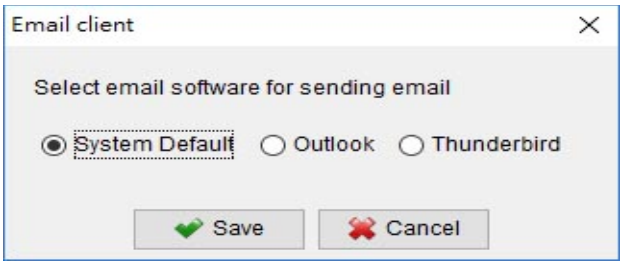
After installation, the newly added font will be available. You can choose the font in the Menu Bar of the document windows.





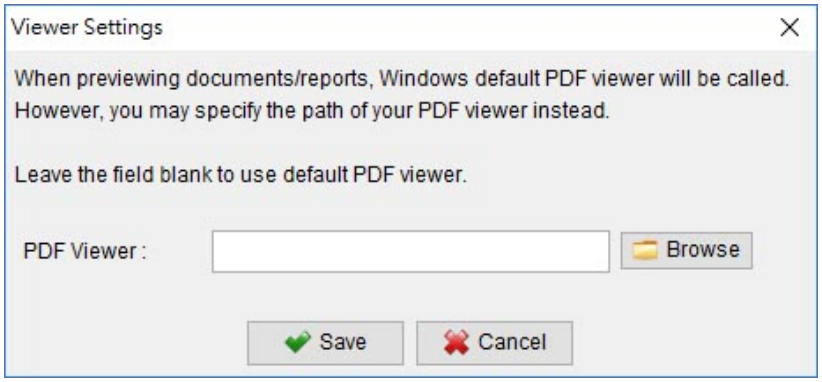
9.11. Email Client

EasyBilling will call system default email client to send email. User can also specify the email client to use when sending email.



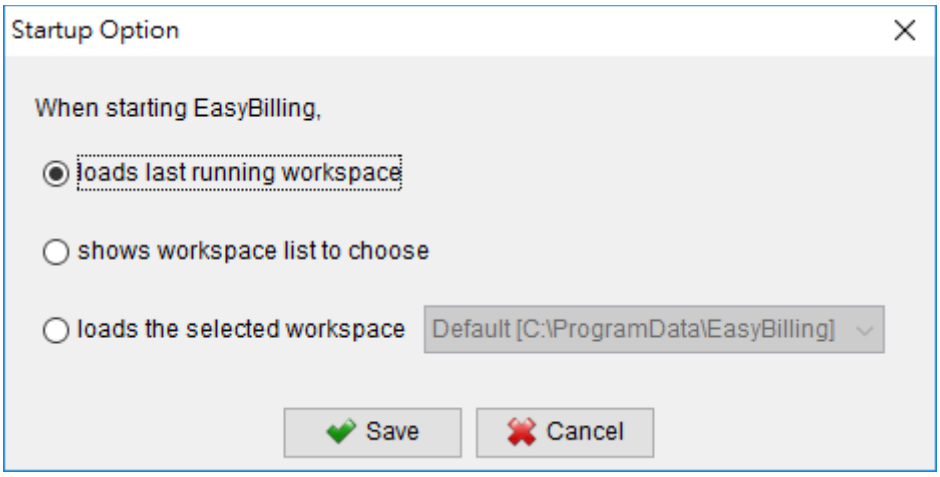
9.12. PDF Viewer

EasyBilling will call system default PDF Viewer when previewing the document. User can also specify his own PDF viewer program for the preview.

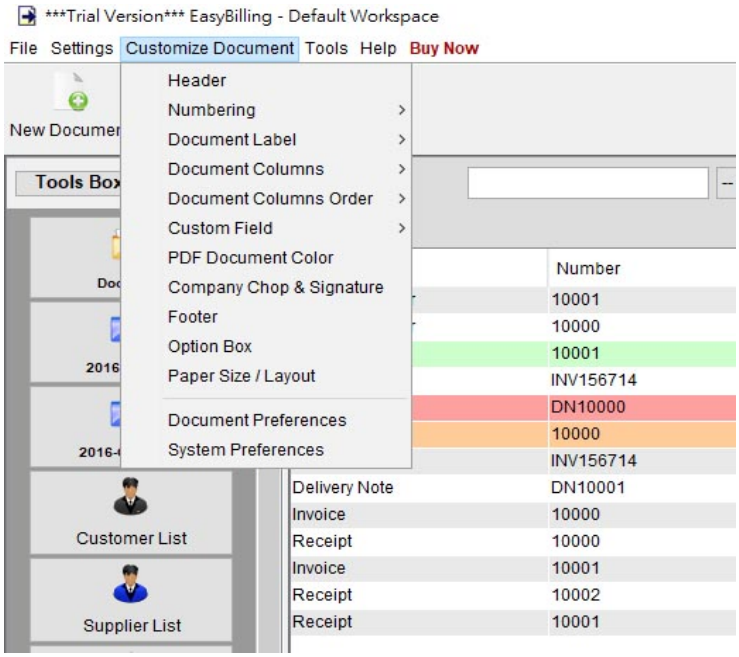


9.13. Startup Option

EasyBilling allows to create multiple workspace. User can specify which workspace to load when starting EasyBilling software.



10. CUSTOMIZE DOCUMENT

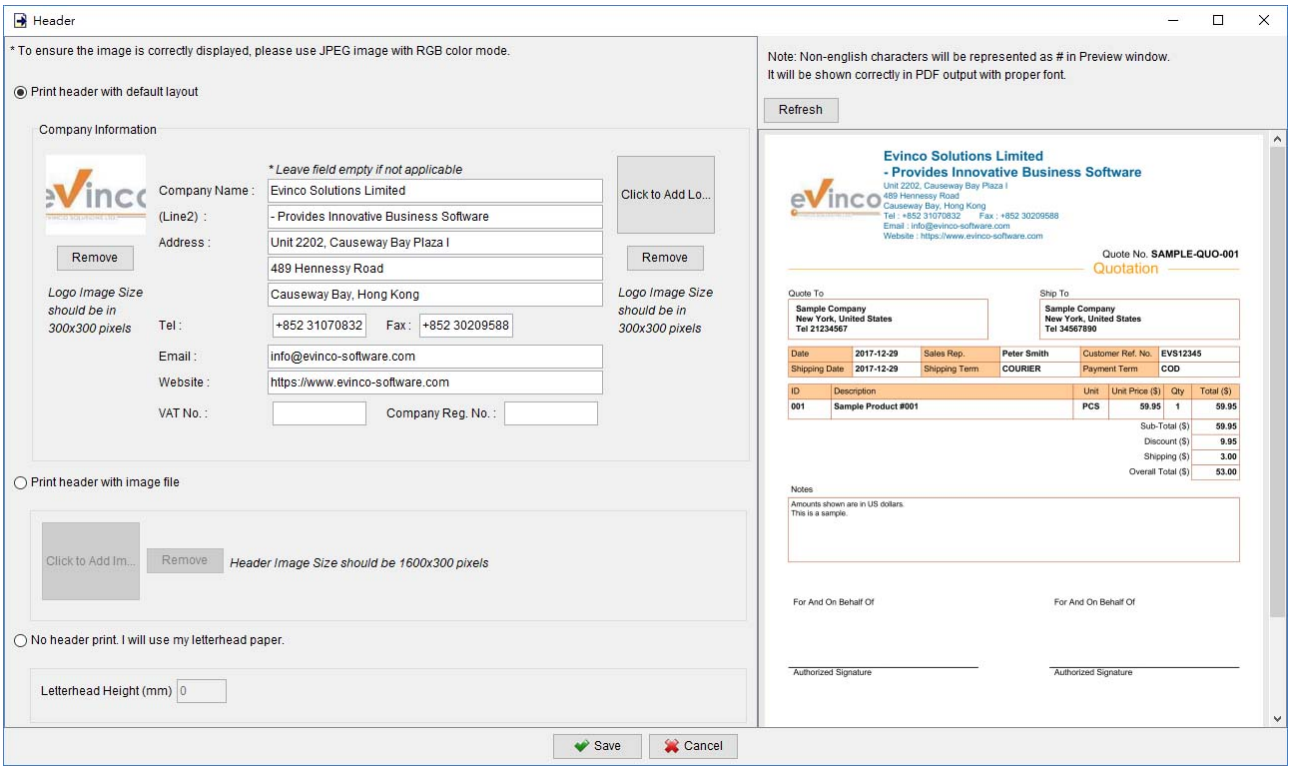


User can customize document to fit the business needs.

- Header
- Numbering
- Document Label
- Document Column
- Document Column Order
- Custom Field
- PDF Document Color
- Company Chop & Signature
- Footer
- Option Box
- Paper Size / Layout
- Document Preferences
- System Preferences

10.1. Header

User can define the header used in document.



There are three option can be chosen in Header.

- **Print header with default layout –** Header will be printed with the predefined layout. User can specify the company information in header and add logo on the left or right.

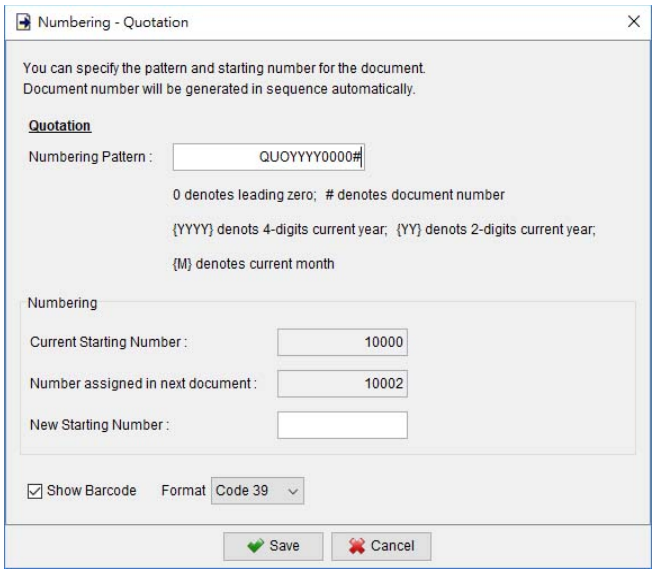
  The logo should be in JPG format and the size should be 300x300 pixels or in similar ratio.

- **Print header with image file –** User can provide a letterhead image. EasyBilling will print the image as header.

  Letterhead image should be 1600x300 pixels or in similar ratio.

- **No header print. I will use my letterhead paper –** If the document is print on a letterhead paper, user can specify the height (mm) for the letterhead.

10.2. Numbering



User can specify the numbering sequence and pattern for the document to fit company need.

- 0 – treat as the leading zero.
- # - Treat as the current document number
- {YYYY} - 4-digits current year
- {YY} - 2-digits current year
- {M} - Current month

Example 1 Numbering Pattern: INV#

Current Number: 23 => Output: INV23

Current Number: 345678 => Output: INV345678

Example 2 Numbering Pattern: INV0000#

Current Number: 23 => Output: INV00023

Current Number: 345678 => Output: INV345678

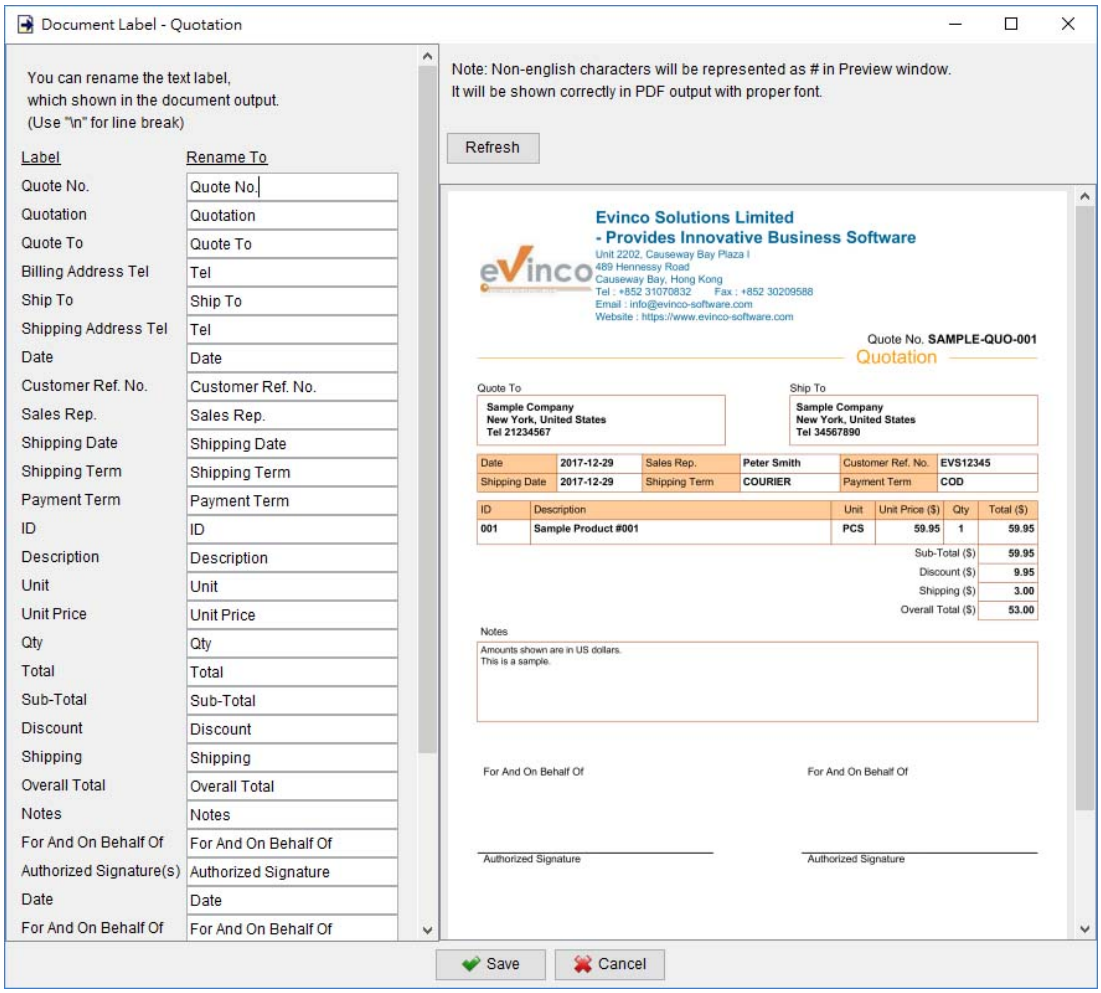
Example 3 Numbering Pattern: INV{YYYY}0000#

Current Number: 23 => Output: INV201800023

Current Number: 345678 => Output: INV2018345678

10.3. Document Label

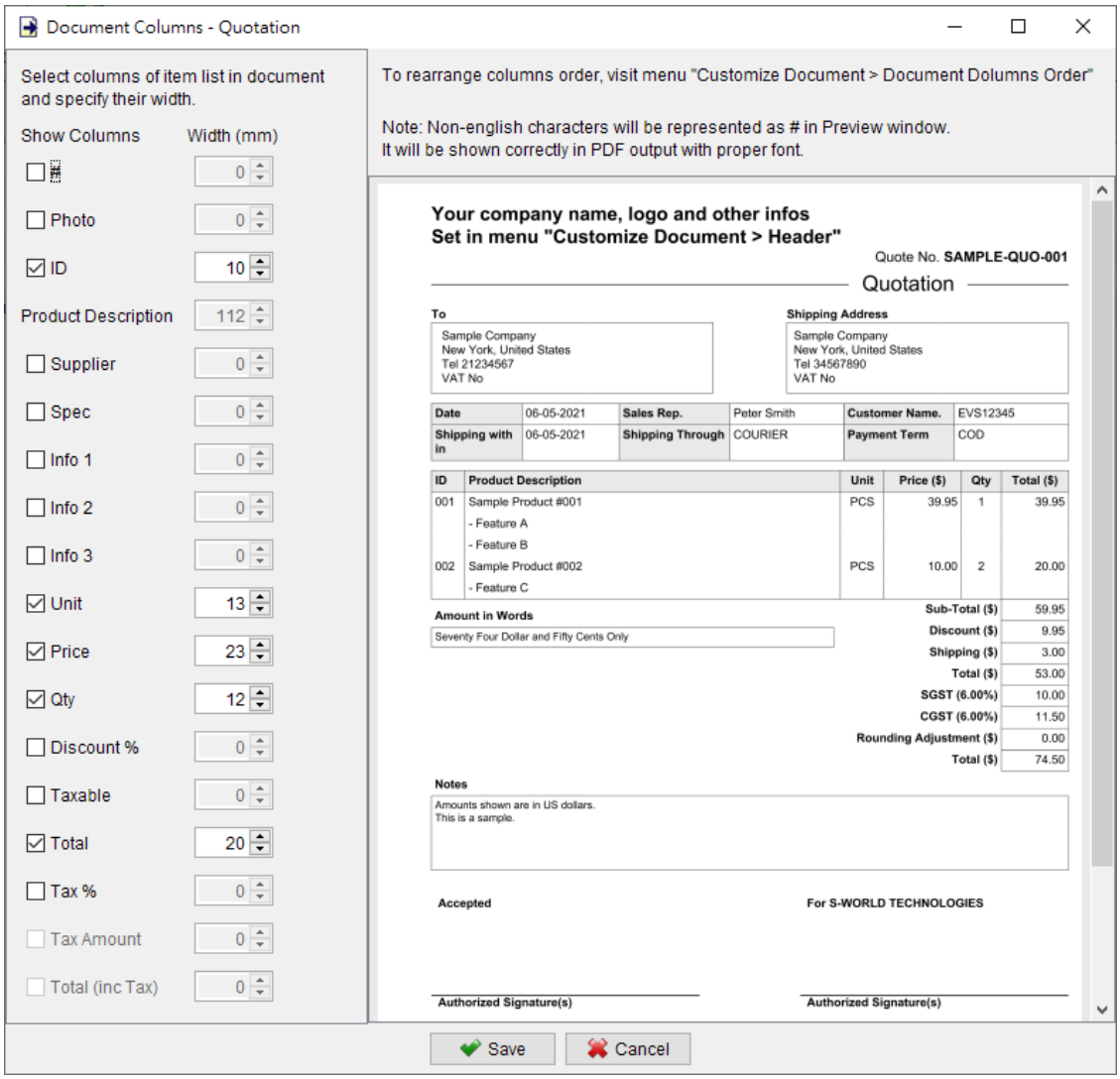
User can customize the document label to fit your company need.



User can revise the document labels on the left. The document preview is shown on the right accordingly.

10.4. Document Column

User can adjust the column of line item in document to fit your need.

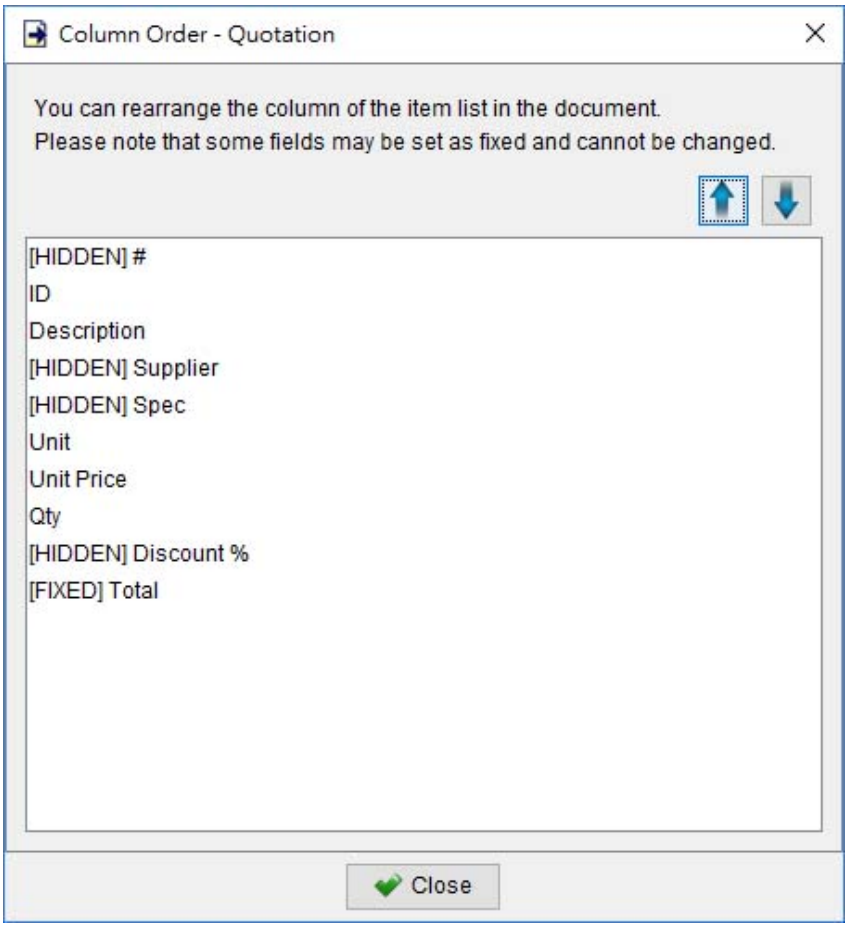


User can adjust the table of line item in document. User can adjust the column width or even hide the column.

User can set the width (mm) of the column. To remove any unused column, simply uncheck the box. The document preview is showed at the bottom.

10.5. Document Column Order

User can rearrange the column of line item in document.



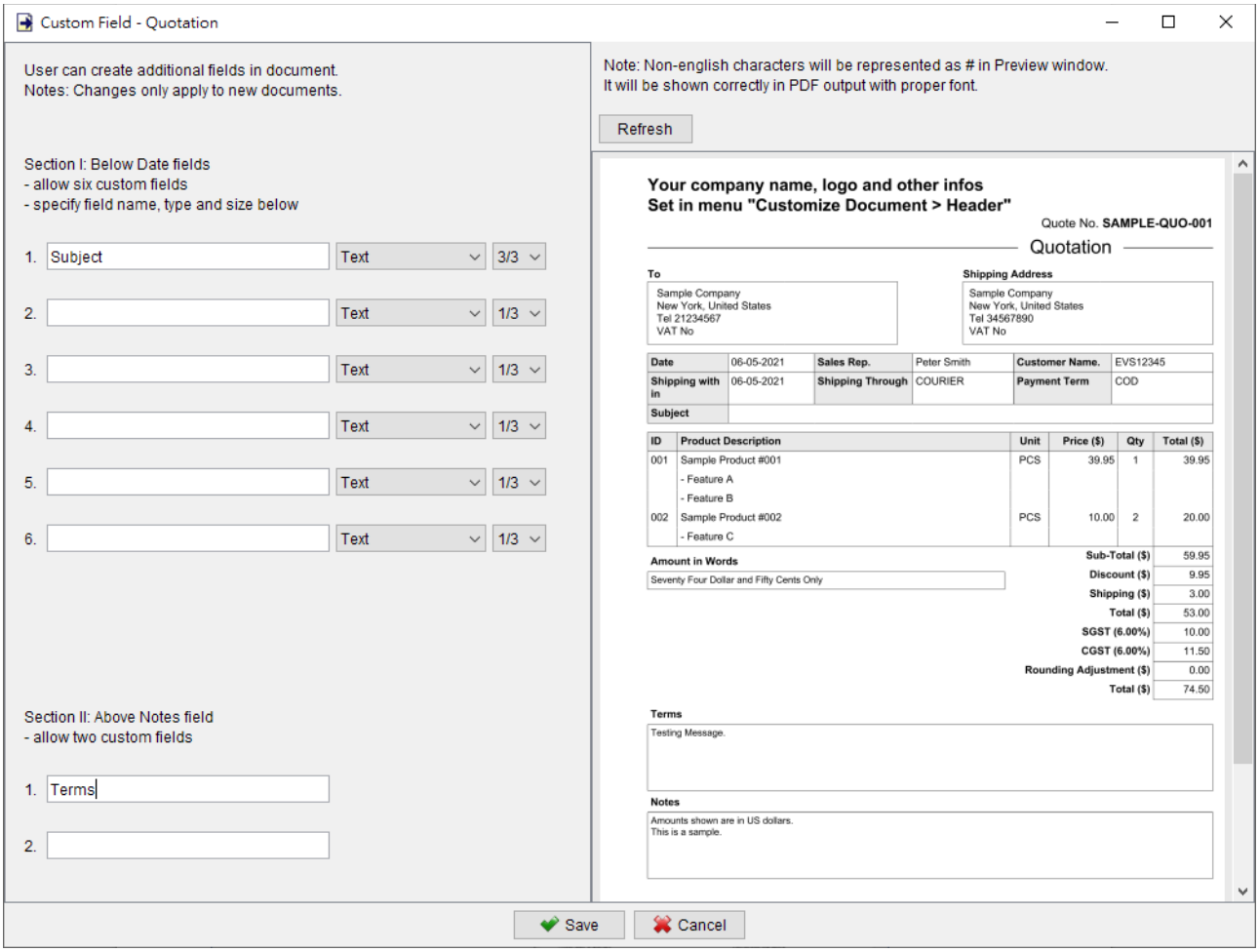
Click and highlight the column name, and click the arrow button to rearrange the order.

10.6. Custom Field

User can add additional field into the document. Two sets of custom field are provided. One setwill be added above the line item table and another set will be added above notes field in the document.

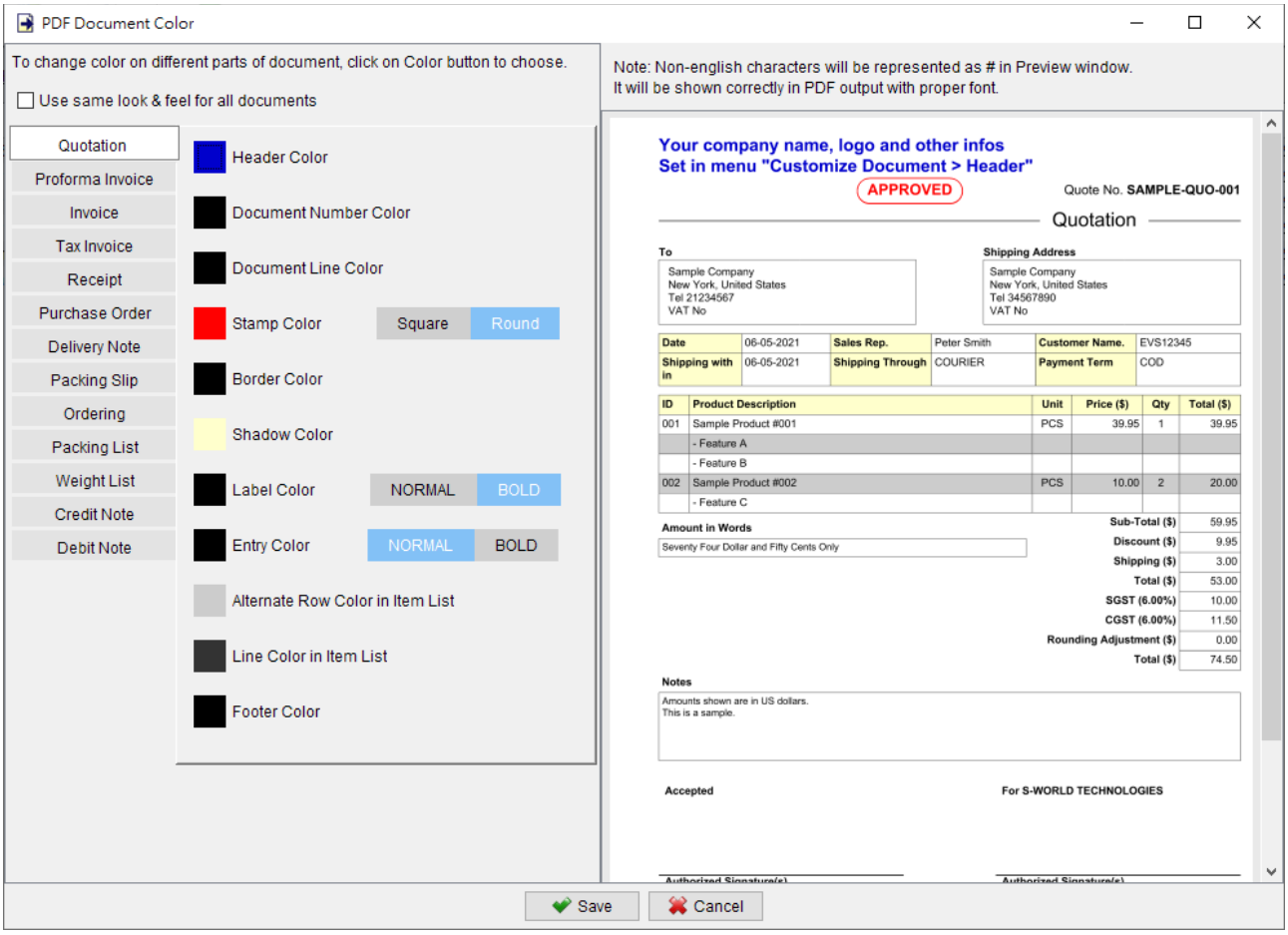
Specify the field name, type (Text, Integer Number, Decimal Number, or Date) and its width. The width can be set as 1/3, 2/3 or 3/3 of the line.

Note: Changes on custom field only applied to the new create document.



10.7. PDF Document Color

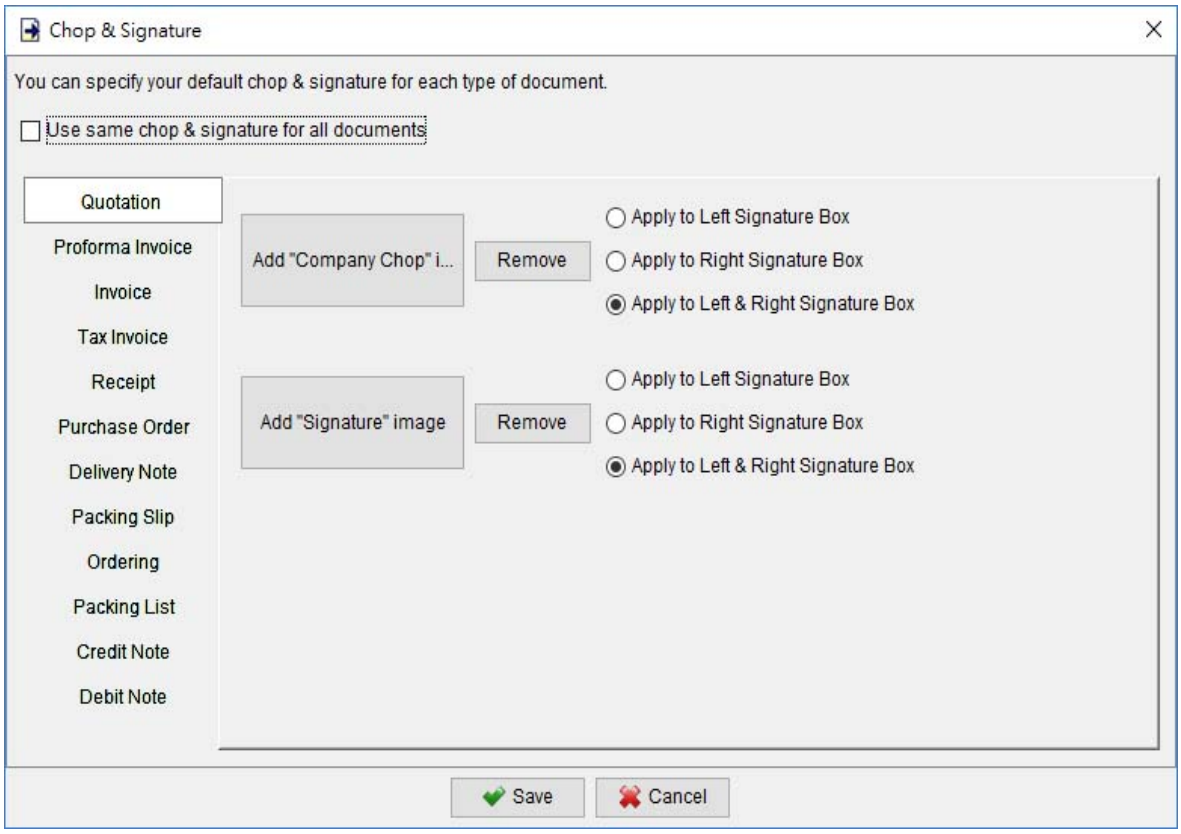
User can change the color of different parts of the document, likes Header, Document Number, Border, Shadow, Footer. Click the button and choose the color for that parts of document.



Click on the document name to switch between different types of document and adjust the color of it. Check the box at the top if user wants to use the same color for all types of documents.

10.8. Chop & Signature

There are two signature boxes at the bottom of the document in EasyBilling. User can define the default company chop & signature image for the signature boxes of the document.

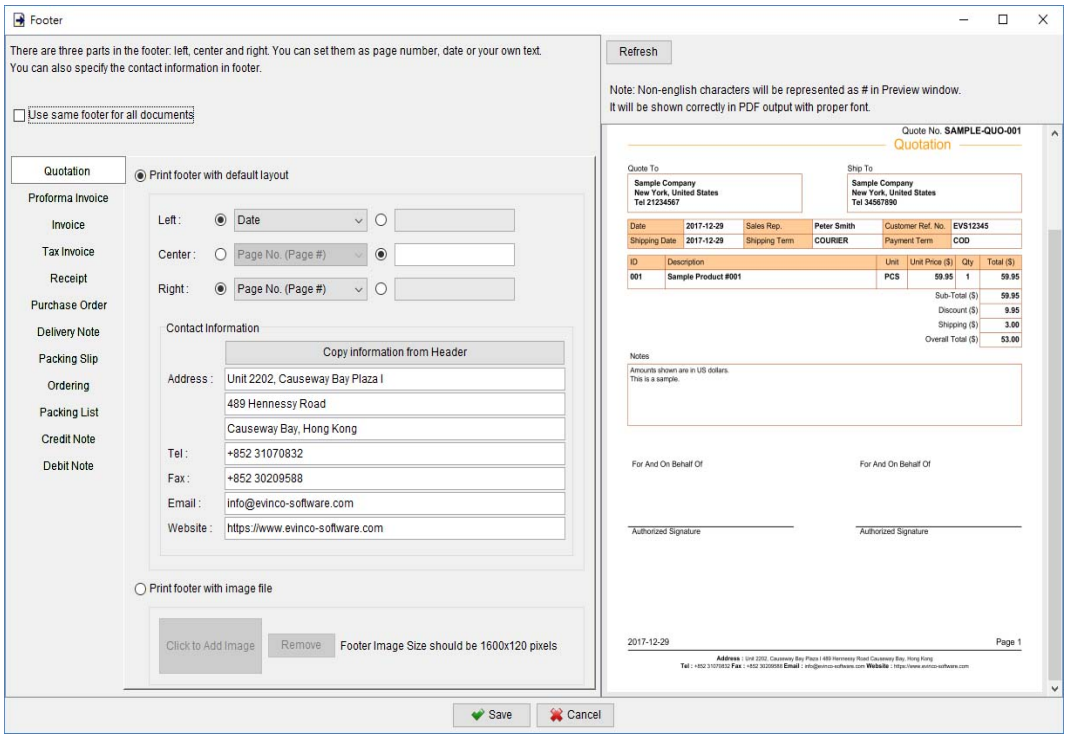


Click the button to load your company chop & signature image. User can specify the image is applied to left, right or both signature boxes.

Click on the document name to switch between different types of document and set the image. Check the box at the top if user wants to use the same chop & signature for all types of documents.

10.9. Footer

User can define footer for different documents.



There are two lines in footer.

The first line has three parts: left, center and right. User can choose Page Number, Date, Document Number, or input own text. The second line allows you to specify company contact information there.

User can use an image as the footer. The image should be in JPG format and the size should be 1600x120 pixels or in similar ratio.

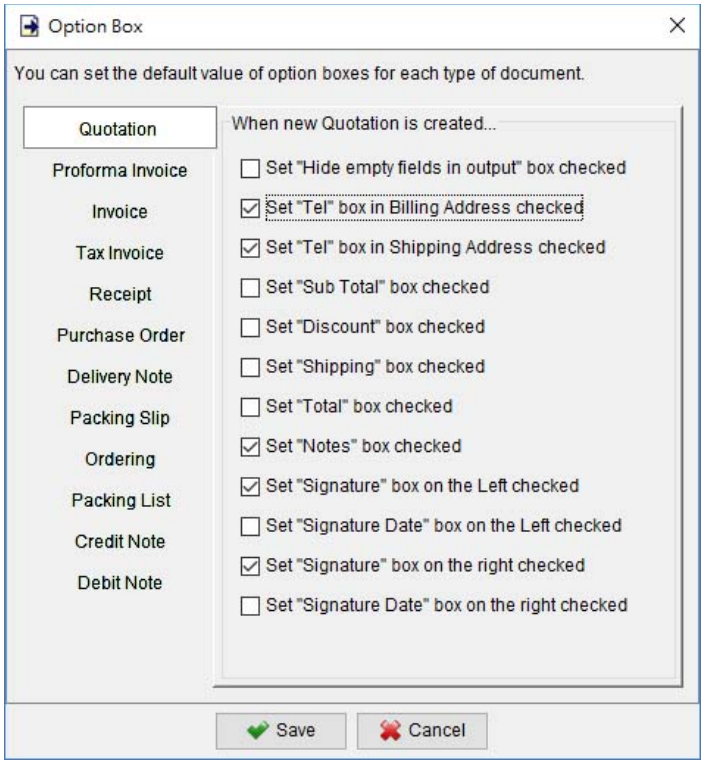
Click on the document name to switch between different types of document and set the footer. Check the box at the top if user wants to use the same footer for all types of documents.

10.10. Option Box

In the document of EasyBilling, different checkboxes are provided to indicate the field is shown or hidden in the output document. For example, to show or hide the note field.

User can specify the default value of these checkboxes when new document is created.

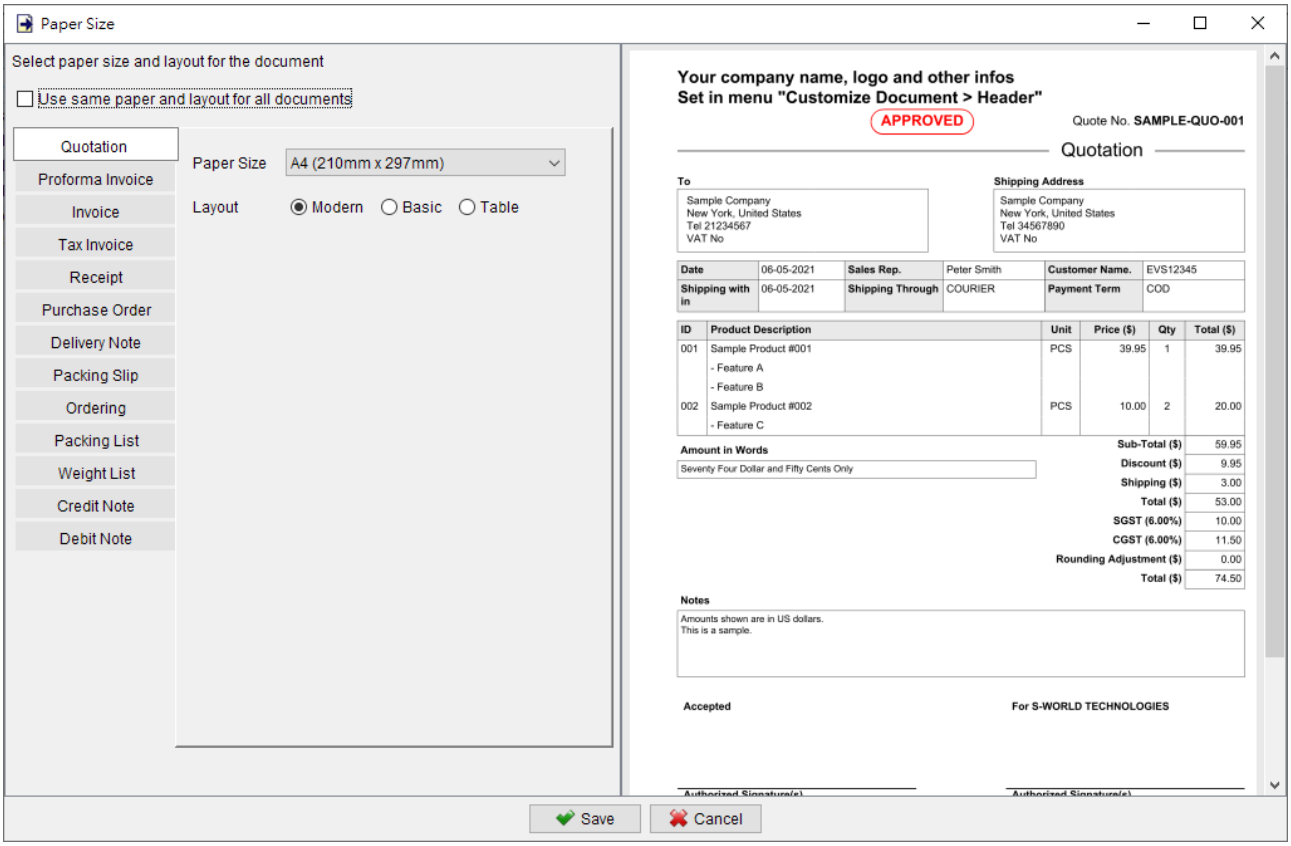
Click on the document name to switch between different types of document and set the default value of those option boxes.



10.11. Paper Size / Layout

User can specify the paper size for the document. Four paper size are provided A4, A5, Letter and Legal.

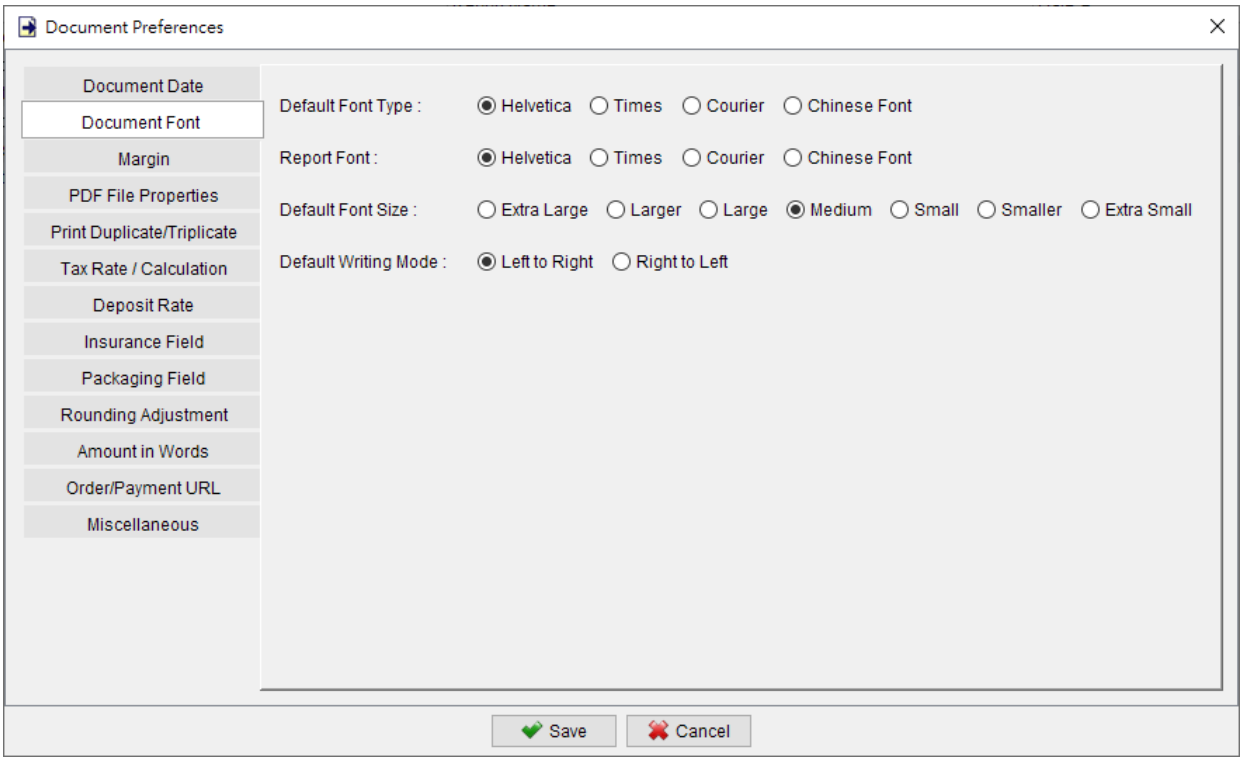
Besides Paper Size, two types of document layouts are provided: Modern and Basic.



10.12. Document Preferences

In the Document Preferences, user can specify different settings for the documents.

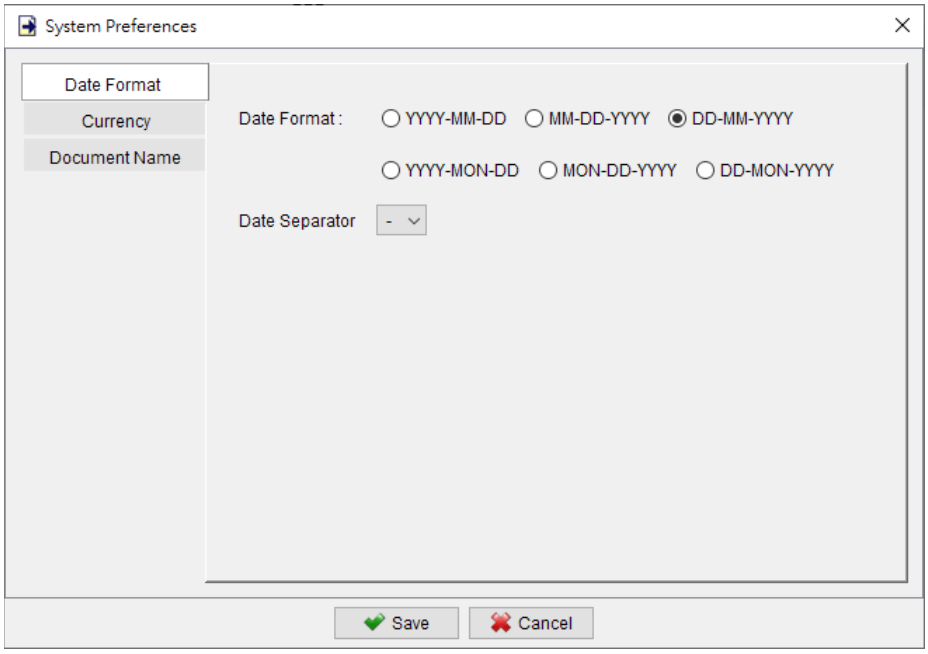
- Document font – default document font type, font size and writing mode
- Margin – page margin and address margin
- PDF File Properties – specify whether PDF output allows Printing, Edit or Copy
- Print Duplicate/Triplicate – show [Print Duplicate/Triplicate] button in document windows and set the Duplicate/Triplicate label
- Tax Rate / Calculation – set default tax rate and its calculation. Specify whether shipping, packaging and insurance fields are taxable.
- Deposit Rate – set default deposit rate in Proforma Invoice, Invoice, and Tax Invoice
- Insurance Field – choose to add Insurance field in selected document
- Packaging Field – choose to add Packaging field in selected document
- Rounding Adjustment – choose to add Rounding Adjustment field in selected document
- Amounts in Words – choose to add Amount in Words field in selected document
- Order/Payment URL – choose to add Order/Payment URL field in selected document
- Miscellaneous



10.13. System Preferences

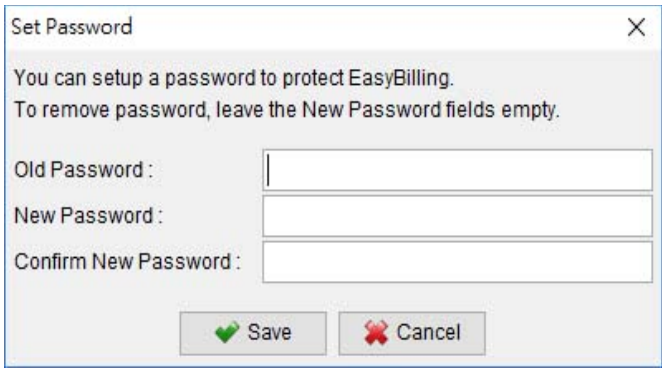
System Preferences allow to set the Sorting, Date Format and Currency for the EasyBilling.

- Date Format – Set Date Format and Date Separator for EasyBilling
- Currency – Specify the default currency and subunit (number of decimal places) in EasyBilling
- Document Name – User can rename document that shown in User Interface



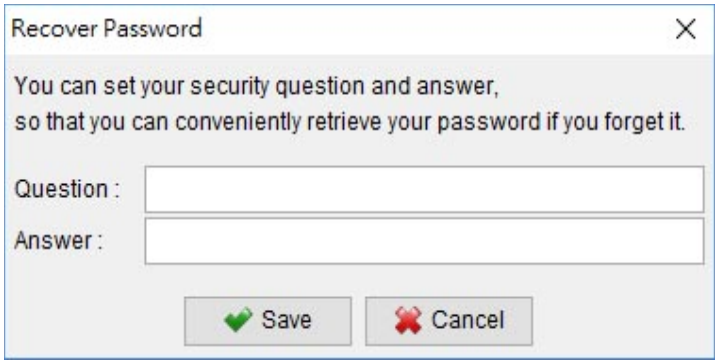
11. TOOLS

11.1. Set Password



To enhance the security of the system, you can set a password for EasyBilling. Every time you start EasyBilling, you will be prompted to input the password. To remove the password, just fill-in the old password and leave other field blank. Click [Submit] to remove it.

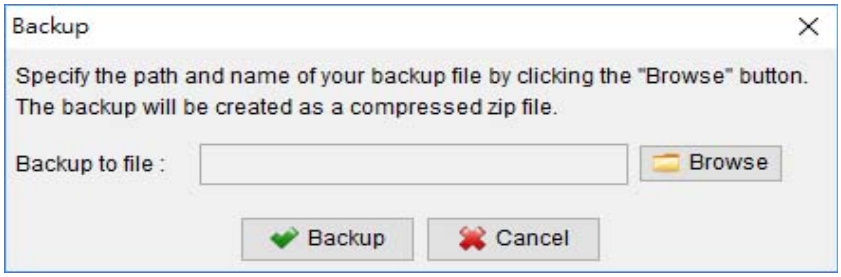
11.2. Recover Password Option



User can set a question and answer as the recover password option.

If user forget the password, he can click [Forget Password] button in the Password Dialog. EasyBilling will show this preset question. If user answer the question correctly, the password will be shown out. To set this "Password Recover Option", user must input the password to confirm he has the access right on the EasyBilling.

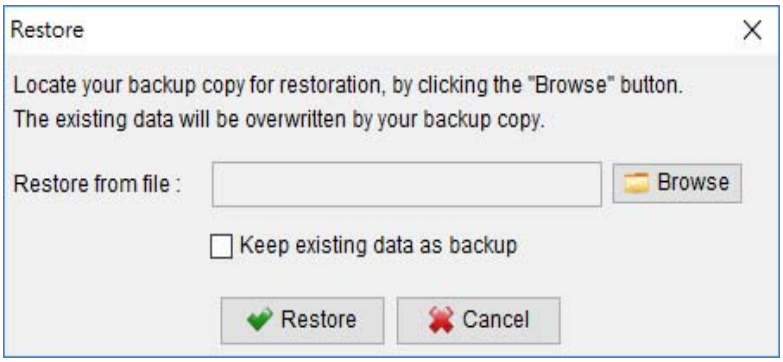
11.3. Backup



User can create a backup for all the data in EasyBilling. It will backup all the documents, reports, customer list, supplier item, item list, and all the software settings.

Click the [Browse] button, and provides a filename to backup. The backup will be made in zip format.

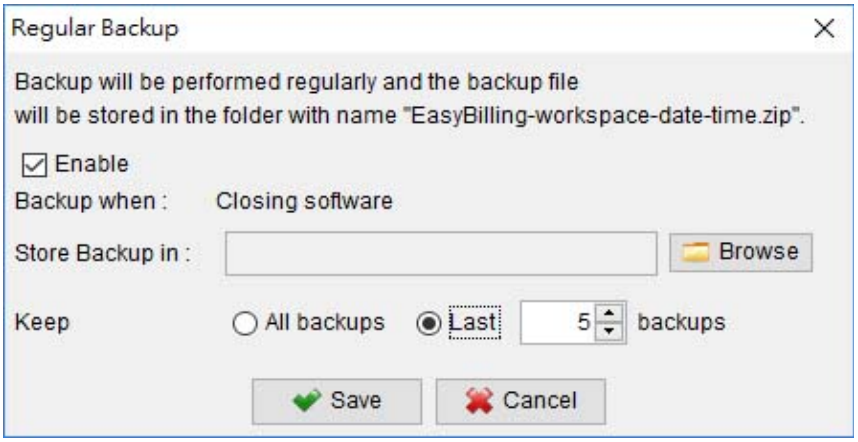
11.4. Restore



User can restore the backup data to the system.

Click the [Browse] icon, and locate your backup zip file. The document, report, data and all the software settings will be restored from the zip file.

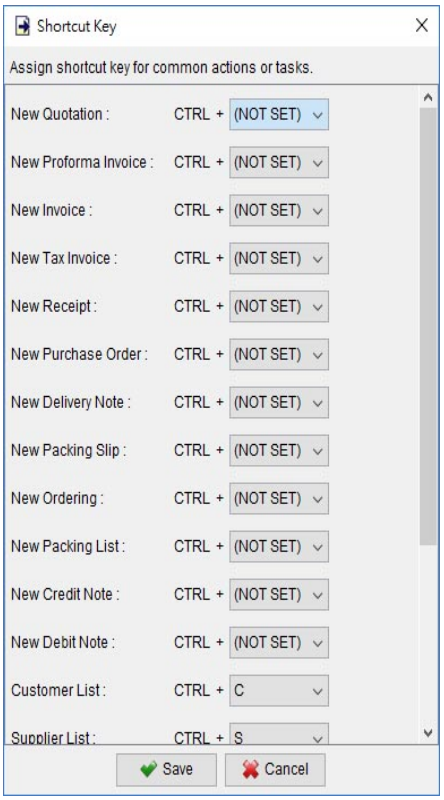
11.5. Regular Backup



User can enable the regular backup feature. EasyBilling will make a backup when closing the software. It allows to choose how many backup copies to be kept. Click the [Browse] icon, and locate your backup folder.

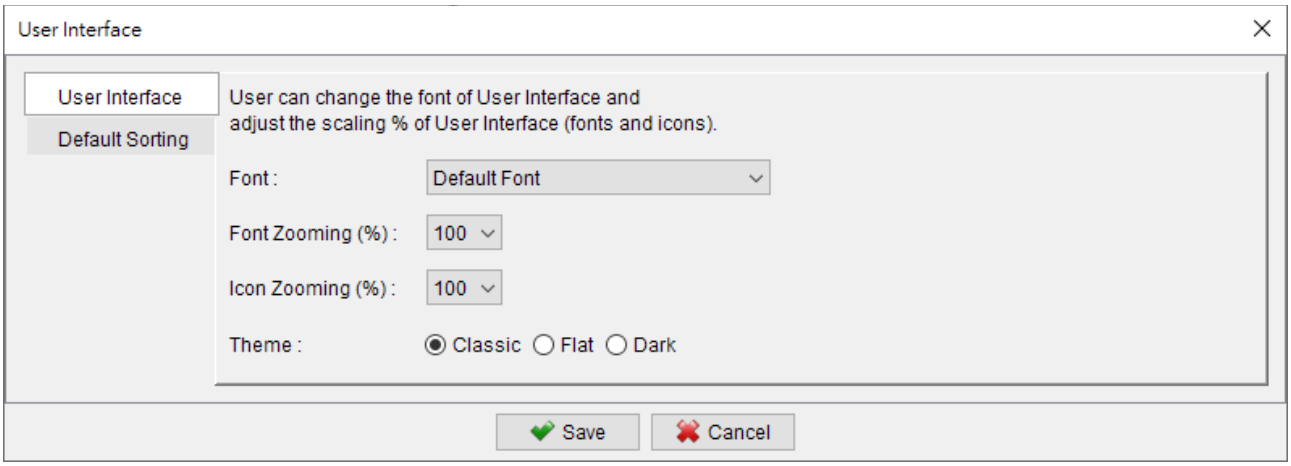
The document, settings, and data will be backup in zip format and saved in the selected folder.

11.6. Shortcut Key



User can define his own Shortcut Keys for some common tasks in EasyBilling. Simply select the Character Key for the task.

11.7. User Interface



User can adjust the zooming scale on the User Interface (Font and Icon). By default, they are set as Auto (100%). To make the font or icon larger, user can choose a larger scale, for example 125, 150 or 200. Three types of theme for User Interface are also provided.

User can also set the default sorting column and order on the document list, customer list, supplier list, item list and report.

12. REGISTER

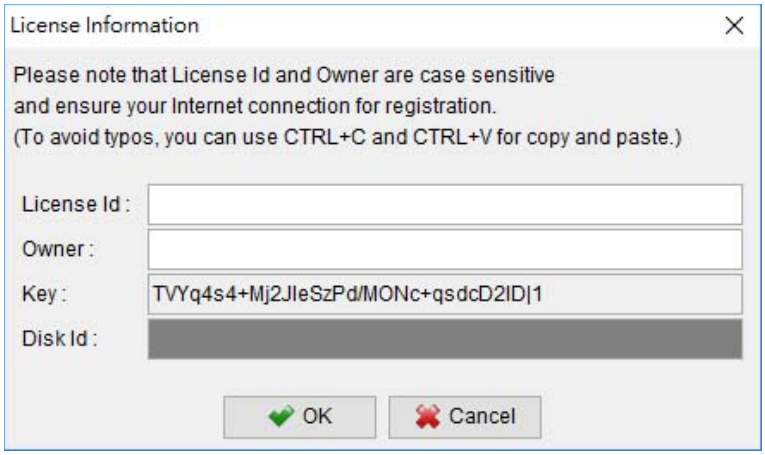
12.1. Trial Version

The Trial Version of EasyBilling provides same functionality as the registered version, but only allowed to create 25 documents in total. To get rid of the restriction of Trial Version, you need to obtain a license and register your EasyBilling copy.

12.2. Registration

To register the EasyBilling,

(1) Go to menu "Help > Register", registration window is shown out.



(2) Fill in the "License Id" and "Owner" information and click "OK" to register. Please ensure the Internet connection when registration is in process. Afterward, restart the EasyBilling to effective the license.

Note: If firewall is setup and block the connection of registration, the registration cannot be completed. You may temporarily disable the firewall to allow the registration go through.

12.3. Why I can’t do registration?

Please check and make sure the Internet is online, and no firewall rule is set to block the Internet connection.

13. IMPORT FILE FORMAT

EasyBilling allows to import customers, suppliers and items information from an Excel file.

Please note the following when preparing the import file

1. First row is the column header. Please leave it untouched.
2. The records should be listed row by row.
3. Leave the field blank if it is not applicable.

Sample Import file can be downloaded below

- "Customers" (XLS)

https://www.evinco-software.com/easydoc/sample/importCustomer-v5.xls

- "Suppliers" (XLS)

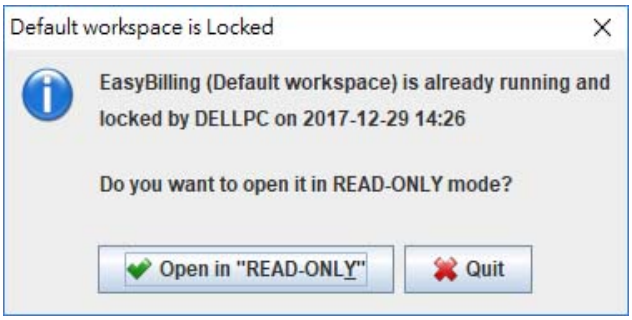
https://www.evinco-software.com/easydoc/sample/importSupplier-v2.xls

- "Items" (XLS)

https://www.evinco-software.com/easydoc/sample/importItem-v7.xls

14. DATABASE LOCKED

14.1. Database locked / Read-Only Mode



EasyBilling is a standalone software and will lock the database when running.

If a second instance try to run on the same database (Workspace) at the same time, the above dialog will be shown. User can choose to run EasyBilling in READ-ONLY mode.

In READ-ONLY mode, user can only view the information but cannot create or edit document, customer/item information or software settings.

User can view, print, preview document but cannot create or edit document. It allows user to create Draft document, which can be process as normal document when database is connected in normal mode.