



# EasyBilling Software

*EasyBilling is a comprehensive sales document management software. 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, Weight 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: 07/16/2024

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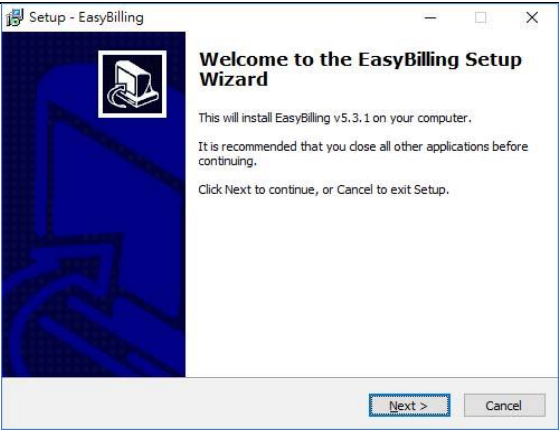
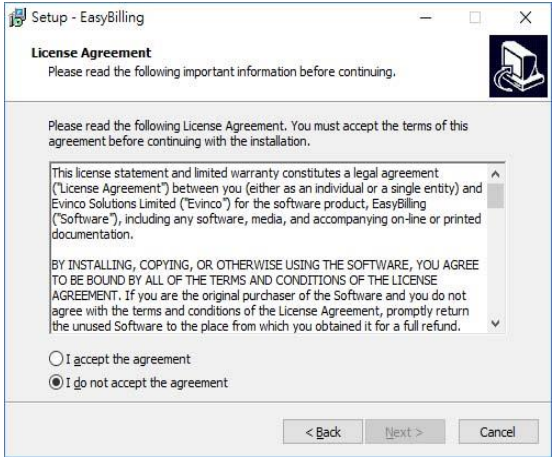
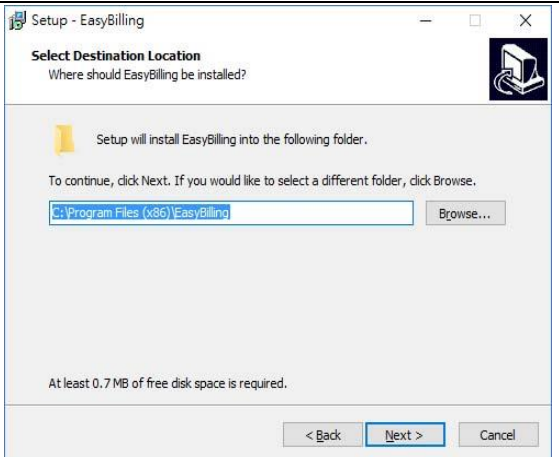
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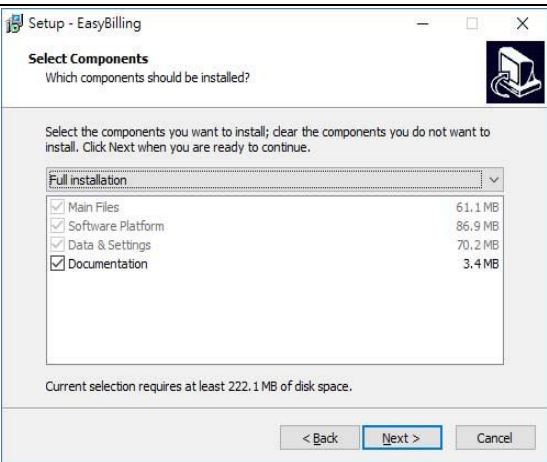
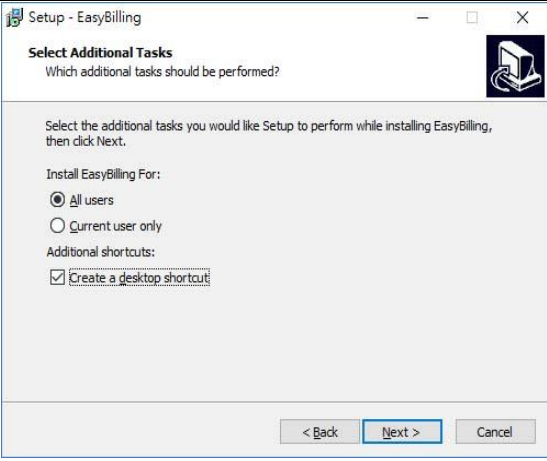
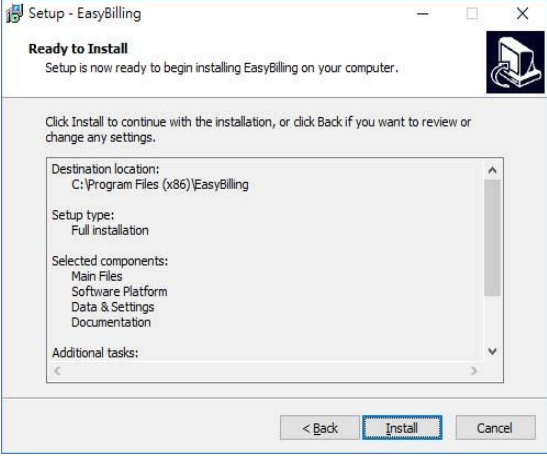
## **1. SYSTEM REQUIREMENTS**

- 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.	



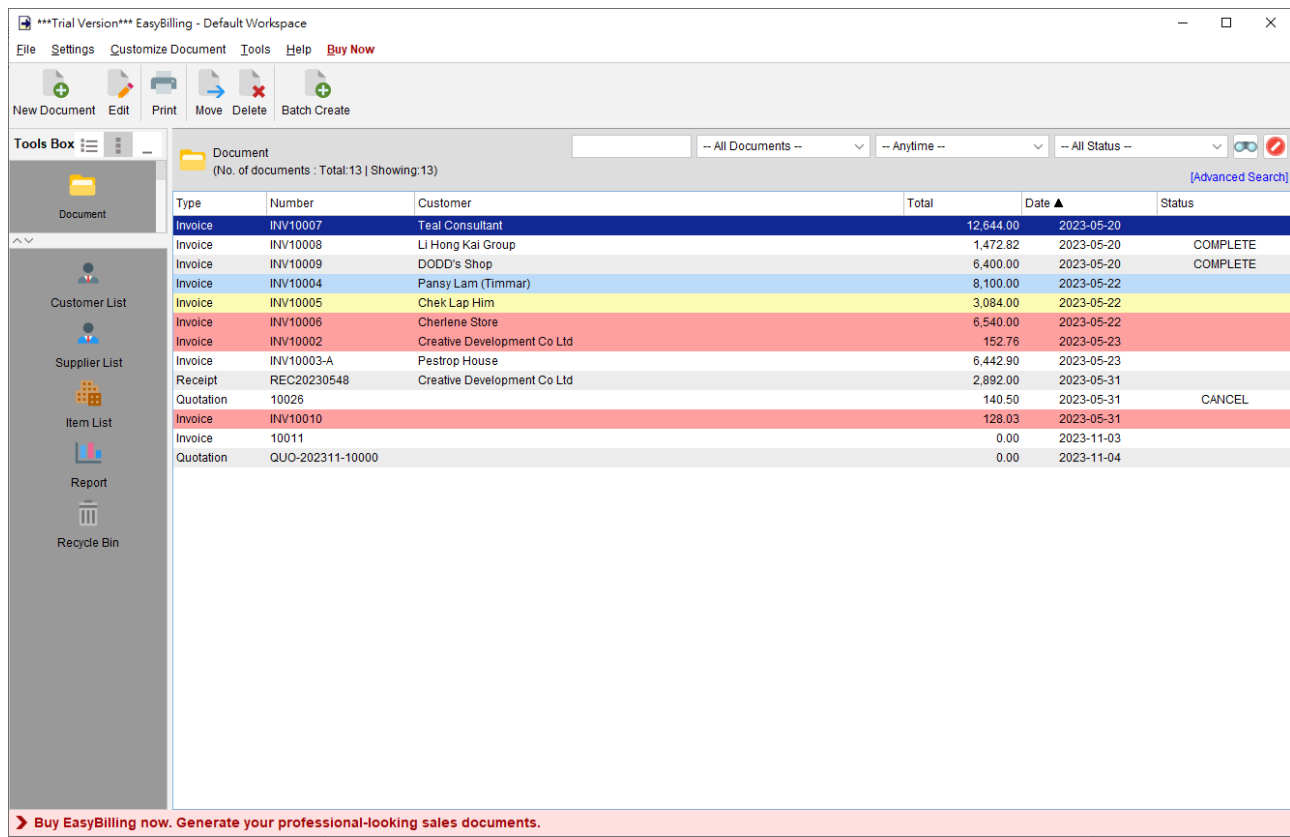


## **2.2. Uninstall**

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 menu bar shown at the top which has five options: File, Tools, Settings, Customize Document, Help. "Buy Now" is available in Trial Version only.

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

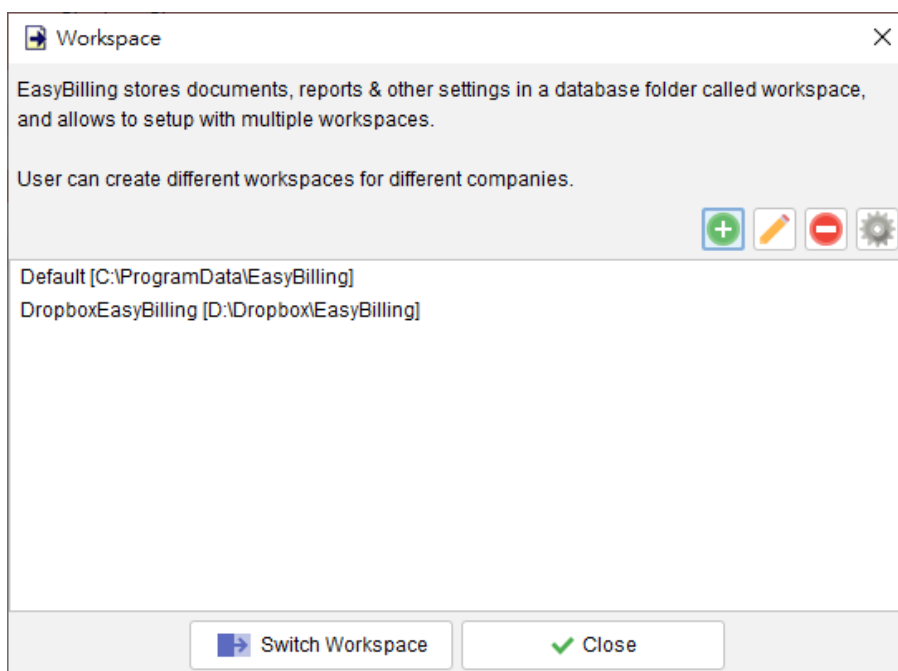
The Tool Box on the left allows you to switch between different modules. At the top, it shows the document folders. Customer List, Supplier List, Item List, and Report are followed.

The main area on the right will lists in tabular format. User can highlight the components and right-click on it to show the popup menu. The popup menu provides further functions.

### 3.1. Workspace

EasyBilling stores documents, reports and settings of your company in a single folder, called workspace. You may 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 to another workspace, simply highlight the workspace and click [Switch Workspace] button at the bottom.

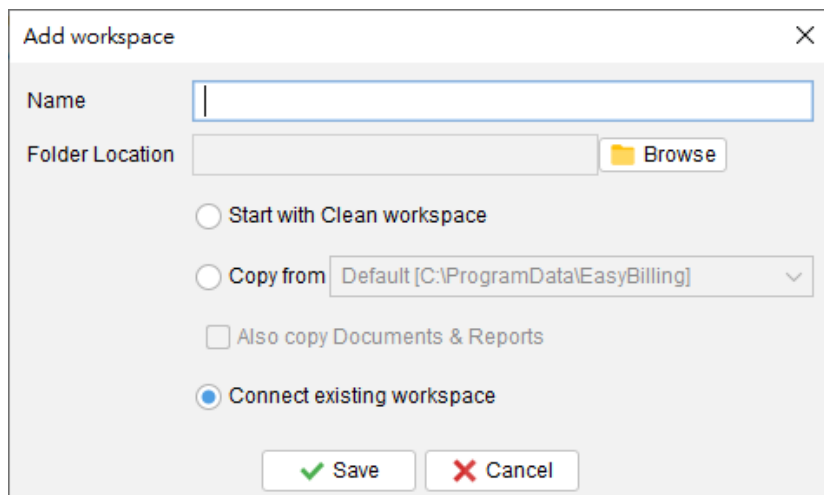


### 3.2. Connect and Share Database between two computers

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.

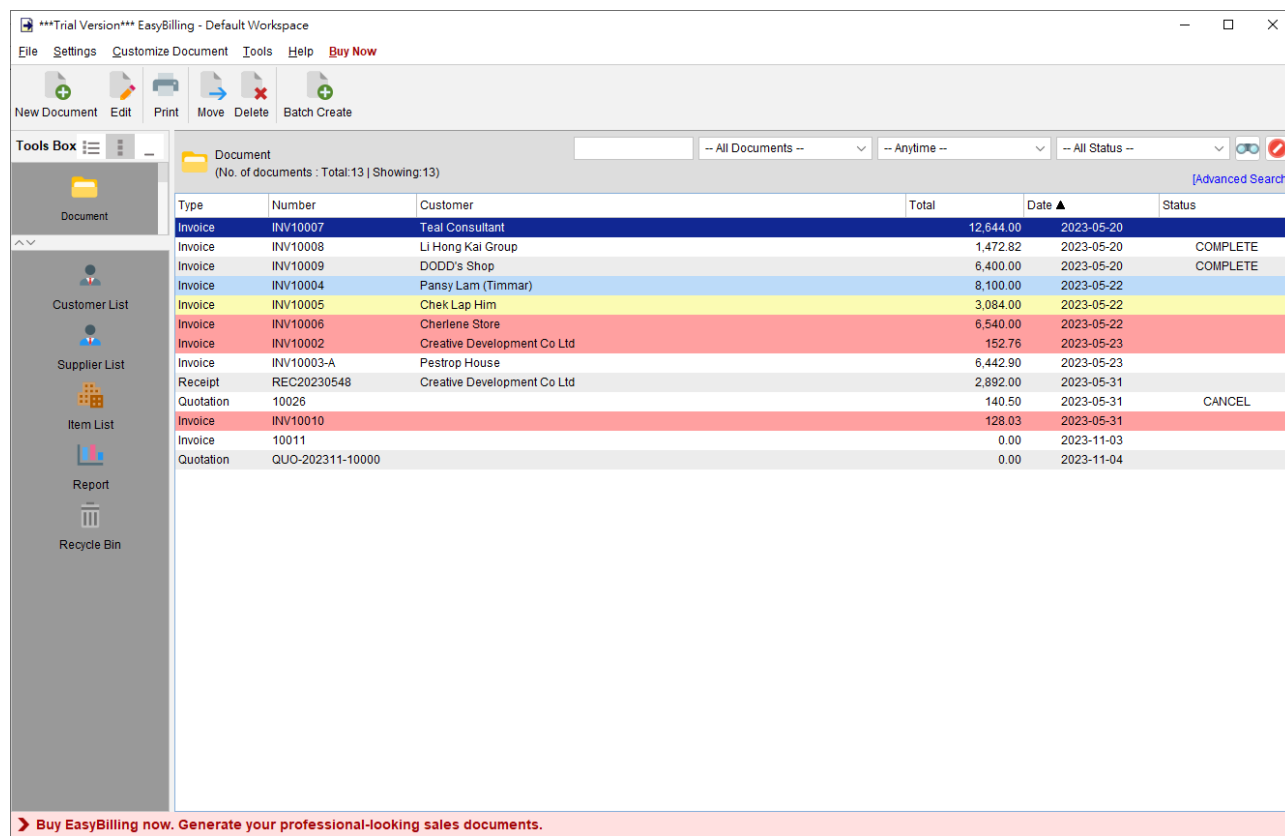
In EasyBilling, you can set your workspace in menu "File > Switch Workspace" and create a new workspace in a network drive or shared folder. In another computer, you can set the EasyBilling to use the same workspace folder but choose "Connect existing workspace". The two EasyBilling will connect and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



The screenshot shows the 'Add workspace' dialog box. It includes a 'Name' input field, a 'Folder Location' input field with a 'Browse' button, and three radio button options: 'Start with Clean workspace', 'Copy from' (with a dropdown menu showing 'Default [C:\ProgramData\EasyBilling]'), and 'Connect existing workspace' (which is selected). There is also a checkbox 'Also copy Documents & Reports'. At the bottom are 'Save' and 'Cancel' buttons.

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



Tool Bar at the top provides:

**New Document**– Create a new document: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Weight 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 to Recycle bn.

**Batch Create** – Create a batch of document with same content for multiple customers.

## EasyBilling User Guide

Documents are listed in tabular format. Click on the table header to sort the documents accordingly. Search and filter options are provided at the top-right corner above the document list.

Right click on the document list will show a popup menu, which provide few other operations, including: Copy, Paste, Change Status, Color Highlight, Export Current List.

\*\*\*Trial Version\*\*\* EasyBilling - Default Workspace

File Settings Customize Document Tools Help **Buy Now**

New Document Edit Print Move Delete Batch Create

Tools Box

Document (No. of documents : Total:14 | Showing:14) [Advanced Search]

Type	Number	Customer	Total	Date ▲	Status
Invoice	INV10007	Teal Consultant	12,644.00	2023-05-20	
Invoice	INV10008	Li Hong Kai Group	1,472.82	2023-05-20	COMPLETE
Invoice	INV10009	DODD's Shop	6,400.00	2023-05-20	COMPLETE
Invoice	INV10004	Pansy Lam (Timmar)	8,100.00	2023-05-22	
Invoice	INV10005	Chek Lap Him	3,084.00	2023-05-22	
Invoice	INV10006	Cherlene Store	6,540.00	2023-05-22	
Invoice	INV10002	Creative Development Co Ltd	152.76	2023-05-23	
Invoice	INV10003-A	Pestrop House	6,442.90	2023-05-23	
Receipt	REC20230548	Creative Development Co Ltd	2,892.00	2023-05-31	
Quotation	10026		140.50	2023-05-31	CANCEL
Invoice	INV10010		128.03	2023-05-31	
Invoice	10011		0.00	2023-11-03	
Quotation	QUO-202311-10000		0.00	2023-11-04	
Quotation	QUO-202311-10001		0.00	2023-11-07	

Customer List  
Supplier List  
Item List  
Report  
Recycle Bin

New Document  
Edit  
Copy  
Paste  
Change Status  
Color Highlight  
Preview  
Print  
Quick Export  
Move  
Delete  
Save As File  
Load From File  
Export Current List  
Refresh  
List Columns

Buy EasyBilling now. Generate your professional-looking sales documents.

## 4.1. Quotation

Quotation

File Export Font Font Size Password Buy Now

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Quote No. QUO-202311-10001 Stamp Watermark

Currency Hong Kong Dollar, \$

Date 2023 - 11 - 07 (YYYY-MM-DD)

Sales Rep.

Customer Ref. No.

Shipping Date

Shipping Term

Payment Term

Customer Information

Quote To

Address

Ship To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Quote To” or “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Quotation:

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

**Document Details** – Specify the header information of the Quotation, 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. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

The screenshot shows the 'Quotation' application window. The 'Document Details' tab is selected. The form includes the following fields and controls:

- Quote No.:** Text field with value 'QUO-202311-10001' and an edit icon.
- Currency:** Dropdown menu with 'Hong Kong Dollar, \$' selected and a plus icon.
- Date:** Date picker showing '2023 - 11 - 07' with a calendar icon.
- Sales Rep.:** Dropdown menu with a plus icon.
- Customer Ref. No.:** Text field.
- Shipping Date:** Date picker.
- Shipping Term:** Dropdown menu with a plus icon.
- Payment Term:** Dropdown menu with a plus icon.
- Customer Information:** A section with two columns: 'Quote To' and 'Ship To'. Each column has a 'Tel' checkbox, a 'VAT No' checkbox, and a text area for 'Address'. There are navigation arrows between the two columns.
- Buttons:** 'Load from Customer List', 'Save to Customer List', and 'Clear' at the bottom right.



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

ID	Description	Unit	Unit Price	Qty	Total

The field provided with a checkbox is an optional field. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of document. Six 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
- Twelve photos (3x4) in one page

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

Quotation QUO-202311-10001

File Export Font Font Size Password Buy Ngw Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

Photo attachments will be listed after the document.

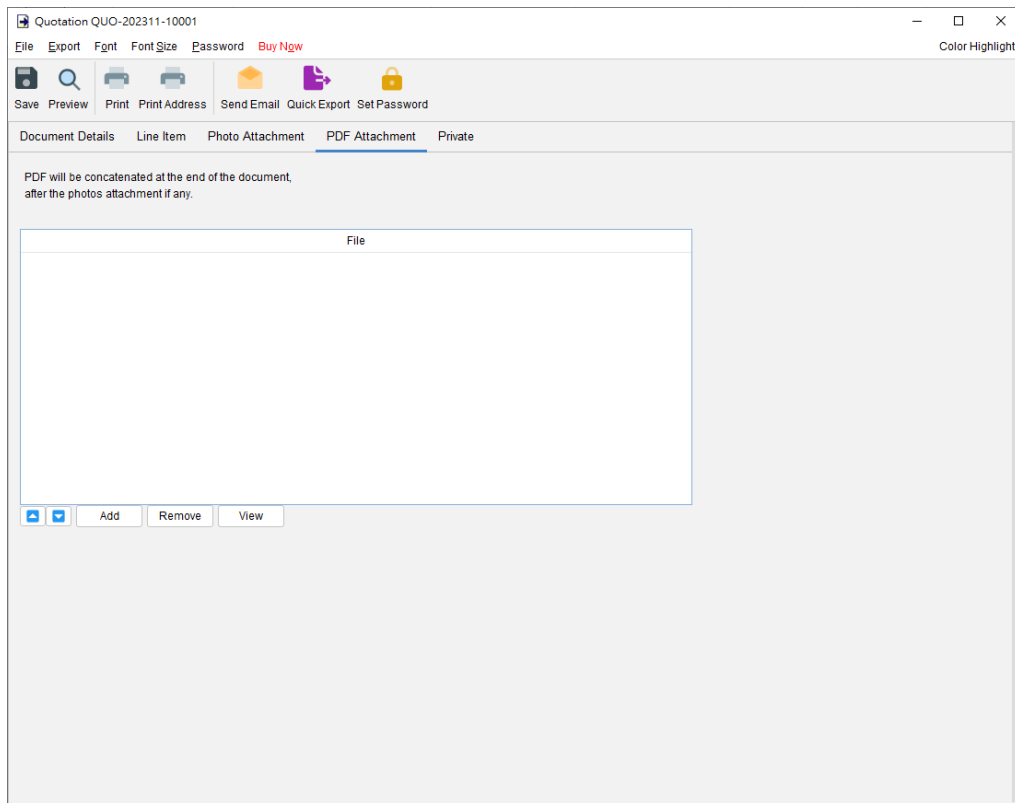
One photo in one page Two photos in one page Six photos (2x3) in one page

Eight photos (2x4) in one page Ten photos (2x5) in one page Twelve photos (3x4) in one page

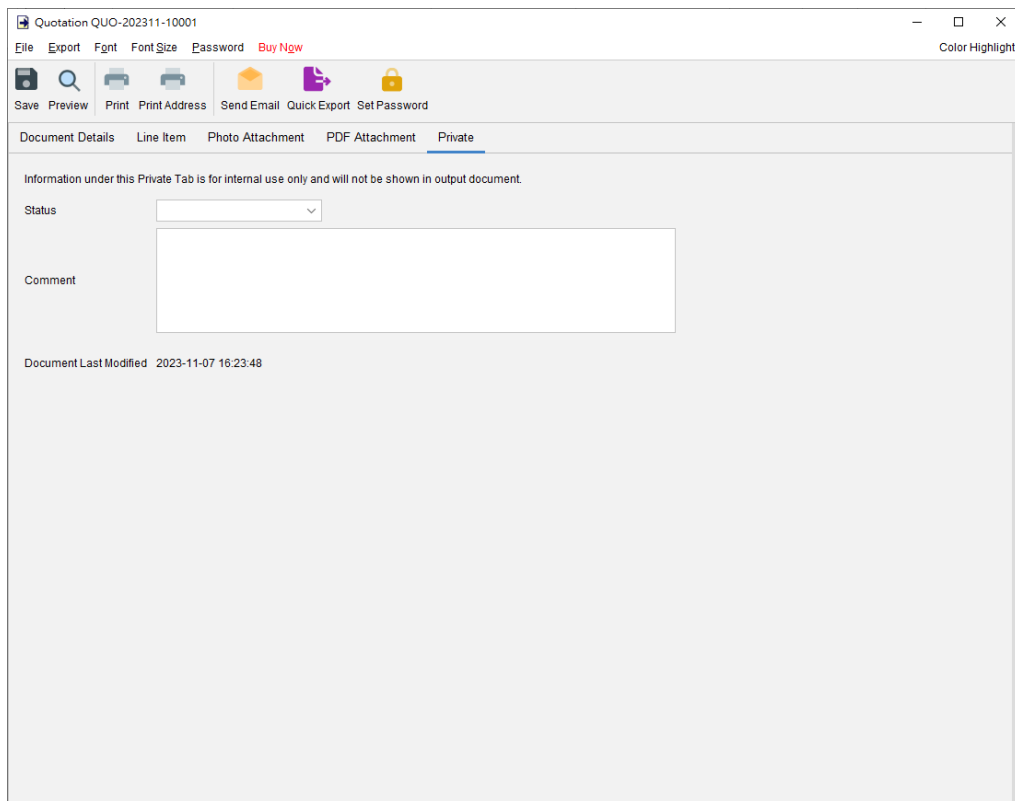
☐ Border

Caption	File
---------	------

**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 be shown in the output.



## 4.2. Proforma Invoice

Proforma Invoice

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation

Proforma Invoice No. 10000 Stamp Watermark

Currency Hong Kong Dollar, \$

Date 2023 - 11 - 07 (YYYY-MM-DD)

Order No.

Sales Rep.

Shipping Date

Shipping Term

Payment Term

Customer Information

Bill To Address

Ship To Address

☐ Tel ☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Bill To” or “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Proforma Invoice:

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

**Document Details** – 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. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Proforma Invoice' application window. The 'Document Details' tab is active, showing various input fields for invoice information. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main form area includes a 'Generate from Quotation' button. Fields for 'Proforma Invoice No.' (10000), 'Currency' (Hong Kong Dollar, \$), 'Date' (2023-11-07), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term' are visible. A 'Customer Information' section at the bottom is divided into 'Bill To' and 'Ship To' columns, each with address fields and checkboxes for 'Tel' and 'VAT No'. Navigation arrows are present between the columns. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

ID	Description	Unit	Unit Price	Qty	Total

Sub-Total: 0.00  
Discount: 0.00  
Shipping:   
Total:   
Tax: 0.00  
Tax 2:   
Total: 0.00  
Deposit:   
Balance:

Notes:   
Load from Note List... Save to Note List

Left Signature Box: Add "Company Chop"... Add "Signature" image... Remove...  
Right Signature Box: Add "Company Chop" i... Add "Signature" image... Remove...  
Date: - - 18

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of document. Six 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
- Twelve photos (3x4) in one page

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

The screenshot shows the 'Photo Attachment' tab in the Proforma Invoice software. The interface includes a menu bar with options like File, Export, Font, Font Size, Password, and Buy Ngw. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area displays the 'Photo Attachment' tab, which shows a list of photo attachments. The list is currently empty, and the text 'Photo attachments will be listed after the document.' is displayed. Below the list, there are six layout options: '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', and 'Twelve photos (3x4) in one page'. A 'Border' checkbox is also present. At the bottom, there is a table with two columns: 'Caption' and 'File'. The table is currently empty. Below the table, there are four buttons: 'Add', 'Remove', 'Edit', and 'View'.

Proforma Invoice

File Export Font Font Size Password Buy Ngw Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

Photo attachments will be listed after the document.

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 Twelve photos (3x4) in one page

☐ Border

Caption	File
---------	------

Add Remove Edit View

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

The screenshot shows the 'Proforma Invoice' application window with the 'PDF Attachment' tab selected. The interface includes a menu bar (File, Export, Font, Font Size, Password, Buy Ngw) and a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. Below the toolbar, the 'PDF Attachment' tab is active, displaying a text box with the instruction: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this text is a large empty rectangular area labeled 'File' for uploading a PDF. At the bottom of this area are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Proforma Invoice' application window with the 'Private' tab selected. The interface includes the same menu bar and toolbar as the previous screenshot. Below the toolbar, the 'Private' tab is active, displaying a text box with the instruction: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this text are two input fields: a 'Status' dropdown menu and a 'Comment' text area.



## 4.3. Invoice

Invoice

File Export Font Font Size Password Buy Ngw Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private Payment Received

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note

Invoice No. 10012 Stamp Watermark

Currency Hong Kong Dollar, \$

Date 2023 - 11 - 07 (YYYY-MM-DD)

Order No.

Sales Rep.

Shipping Date

Shipping Term

Payment Term

Customer Information

Bill To Address

Ship To Address

☐ Tel ☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Bill To” or “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are six parts in Invoice:

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

**Document Details** – Specify the header information of the 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. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Invoice' application window. The 'Document Details' tab is active, showing various input fields for invoice information. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main form area includes a 'Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note' button. Fields for 'Invoice No.' (10012), 'Stamp', 'Watermark', 'Currency' (Hong Kong Dollar, \$), 'Date' (2023-11-07), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term' are visible. A 'Customer Information' section at the bottom contains 'Bill To' and 'Ship To' address fields, with checkboxes for 'Tel' and 'VAT No'. Navigation buttons 'Load from Customer List', 'Save to Customer List', and 'Clear' are at the bottom right.

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

ID	Description	Unit Price	Qty	Total

Sub-Total: 0.00  
Discount: 0.00  
Shipping: 0.00  
Total: 0.00  
Tax: 0.00  
Tax 2: 0.00  
Total: 0.00  
Deposit: 0.00  
Balance: 0.00

Notes: [Text Area]  
Load from Note List: [Button] Save to Note List: [Button]

Left Signature Box: [Add "Company Chop"...] [Add "Signature" Image] [Remove]  
Right Signature Box: [Add "Company Chop"...] [Add "Signature" Image] [Remove]

Date: [Picker] - [Picker] - [Picker] [Calendar Icon]

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

The screenshot shows the 'Photo Attachment' tab in the EasyBilling software. The window title is 'Invoice'. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Photo Attachment' tab is selected, showing a section titled 'Photo attachments will be listed after the document.' Below this, there are six layout options: 'One photo in one page' (selected), 'Two photos in one page', 'Six photos (2x3) in one page', 'Eight photos (2x4) in one page', 'Ten photos (2x5) in one page', and 'Twelve photos (3x4) in one page'. There is a 'Border' checkbox which is currently unchecked. Below the layout options is a table with two columns: 'Caption' and 'File'. The table is currently empty. At the bottom of the table, there are four buttons: 'Add', 'Remove', 'Edit', and 'View'.

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

The screenshot shows the 'PDF Attachment' tab selected in the 'Invoice' application. The interface includes a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment' (active), 'Private', and 'Payment Received'. A text box states: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular area labeled 'File' for attaching PDFs. At the bottom of this area are buttons for 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Private' tab selected in the 'Invoice' application. The interface is similar to the previous one, with the same menu bar and toolbar. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', 'Private' (active), and 'Payment Received'. A text box states: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this are two input fields: a 'Status' dropdown menu and a 'Comment' text area.

**Payment Received** – This tab is to record the payment received for the Invoice.

The screenshot shows the 'Payment Received' tab in the EasyBilling software. The interface includes a menu bar with options like File, Export, Font, Font Size, Password, and Buy Now. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area is divided into sections: Document Details, Line Item, Photo Attachment, PDF Attachment, Private, and Payment Received (which is currently selected). The Payment Received section contains a table for recording payments with columns for Date, Payment Method, Reference Number, Description, and Amount Received. Below the table are buttons for Add, Remove, and Edit. To the left of the table is a summary section with fields for Invoice Total, Deposit, Balance, Total Payment Received, and Outstanding Balance, each with a corresponding input field and a calculated value of 0.00. Below this is a section for adding notes with a checkbox and a text area. At the bottom, there are sections for adding signatures and dates, each with a checkbox, a text input field, and a date picker.

Click [Add] button add a record for the payment, includes: Date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The screenshot shows the 'Payment Received' dialog box. It has a title bar with a close button. The main area is titled 'Input details of payment received' and contains several input fields: Date (with a date picker), Payment Method, Reference Number, Description, and Amount Received. At the bottom, there are two buttons: 'Add' (with a green checkmark) and 'Cancel' (with a red X).

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

The screenshot shows the 'Tax Invoice' window in the EasyBilling software. The window title is 'Tax Invoice'. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Document Details' tab is selected, displaying various invoice fields. The 'Invoice No.' is 10002. The 'Currency' is set to 'Hong Kong Dollar, \$'. The 'Date' is 2023-11-07. There are also fields for 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. Customer information is divided into 'Bill To' and 'Ship To' sections, each with fields for 'Address', 'Tel', and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Bill To” or “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are six parts in Tax Invoice:

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

**Document Details** – Specify the header information of the Tax 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. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Tax Invoice' application window. The 'Document Details' tab is active, showing various input fields for invoice information. At the top, there is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. Below the toolbar, a tabbed interface shows 'Document Details' selected. The main form includes fields for Invoice No. (10002), Currency (Hong Kong Dollar, \$), Date (2023-11-07), Order No., Sales Rep., Shipping Date, Shipping Term, and Payment Term. There are also dropdown menus for Stamp and Watermark. A 'Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note' button is present. The 'Customer Information' section at the bottom has two columns: 'Bill To' and 'Ship To', each with multiple address lines and checkboxes for Tel and VAT No. Navigation arrows are between the columns. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.



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

ID	Description	Unit	Unit Price	Qty	Taxable	Total
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

Buttons: Add, Remove, Clear, Clear All, Extra Blank Line, 0

Checkboxes and Fields:

- ☐ Sub-Total
- ☐ Discount
- ☐ Shipping
- ☐ Total
- ☐ Tax 0.00
- ☐ Tax 2 0.00
- Total 0.00**
- ☐ Deposit
- ☐ Balance

Notes: [Text Area]

Buttons: Load from Note L..., Save to Note List

Signature Boxes:

- ☐ Left Signature Box: Add "Company Chop"..., Add "Signature" image
- ☐ Right Signature Box: Add "Company Chop" i..., Add "Signature" image

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

The screenshot shows a software window titled 'Tax Invoice' with a menu bar (File, Export, Font, Font Size, Password, Buy Now) and a toolbar (Save, Preview, Print, Print Address, Send Email, Quick Export, Set Password). The 'Photo Attachment' tab is selected in the main menu. Below the menu, a message states 'Photo attachments will be listed after the document.' There are six layout buttons: 'One photo in one page' (selected), 'Two photos in one page', 'Six photos (2x3) in one page', 'Eight photos (2x4) in one page', 'Ten photos (2x5) in one page', and 'Twelve photos (3x4) in one page'. A 'Border' checkbox is present. Below these is a large table with two columns: 'Caption' and 'File'. At the bottom, there are four buttons: 'Add', 'Remove', 'Edit', and 'View'.

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

The screenshot shows the 'Tax Invoice' application window. The 'PDF Attachment' tab is selected in the top navigation bar. Below the navigation bar, a message states: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' A large empty rectangular box labeled 'File' is provided for uploading a PDF. At the bottom of this box, there are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Tax Invoice' application window with the 'Private' tab selected. A message at the top of the tab area reads: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this, there is a 'Status' label next to a dropdown menu, and a 'Comment' label next to a large text input area.

**Payment Received** – This tab is to record the payment received for the Invoice.

The screenshot shows the 'Payment Received' tab in the EasyBilling software. The interface includes a menu bar (File, Export, Font, Font Size, Password, Buy Now), a toolbar (Save, Preview, Print, Print Address, Send Email, Quick Export, Set Password), and a document details section. The 'Payment Received' section features a table for recording payments with columns: Date, Payment Method, Reference Number, Description, and Amount Received. Below the table are buttons for Add, Remove, and Edit. A summary section shows 'Tax Invoice Total' (0.00), 'Deposit', 'Balance', 'Total Payment Received' (0.00), and 'Outstanding Balance' (0.00). There is also a notes section with a 'Notes' checkbox and a rich text editor. At the bottom, there are signature boxes for 'Left Signature Box' and 'Right Signature Box', each with 'Add' and 'Remove' buttons and a date picker.

Click [Add] button add a record for the payment, includes: Date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The screenshot shows the 'Payment Received' dialog box. It has a title bar with a close button (X). The main area is titled 'Input details of payment received'. It contains fields for: Date (with a date picker showing YYYY-MM-DD), Payment Method, Reference Number, Description (with a large text area), and Amount Received. At the bottom, there are two buttons: 'Add' (with a green checkmark) and 'Cancel' (with a red X).

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

## 4.5. Receipt

Receipt

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Debit Note

Receipt No. 10001 Stamp Watermark

Currency Hong Kong Dollar, \$

Date 2023 - 11 - 07 (YYYY-MM-DD)

Payer Information

Payer

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Payer” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Receipt:

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

**Document Details** – Specify the header information of the Receipt, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Receipt' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Debit Note'. The form fields include: 'Receipt No.' (10001), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Currency' (Hong Kong Dollar, \$), and 'Date' (2023-11-07). Below these is the 'Payer Information' section with fields for 'Payer' and 'Address'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

ID	Description	Unit	Unit Price	Qty	Taxable	Total
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

Buttons: Add, Remove, Clear, Clear All, Extra Blank Line (0)

Checkboxes: Sub-Total, Discount, Shipping, Total, Tax, Tax 2, Paid, Total Due

Total: 0.00

Notes: [Text Area]

Signature Boxes: Left Signature Box, Right Signature Box

Signature Fields: Add "Company Chop" I..., Add "Signature" Image, Remove, Date

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

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

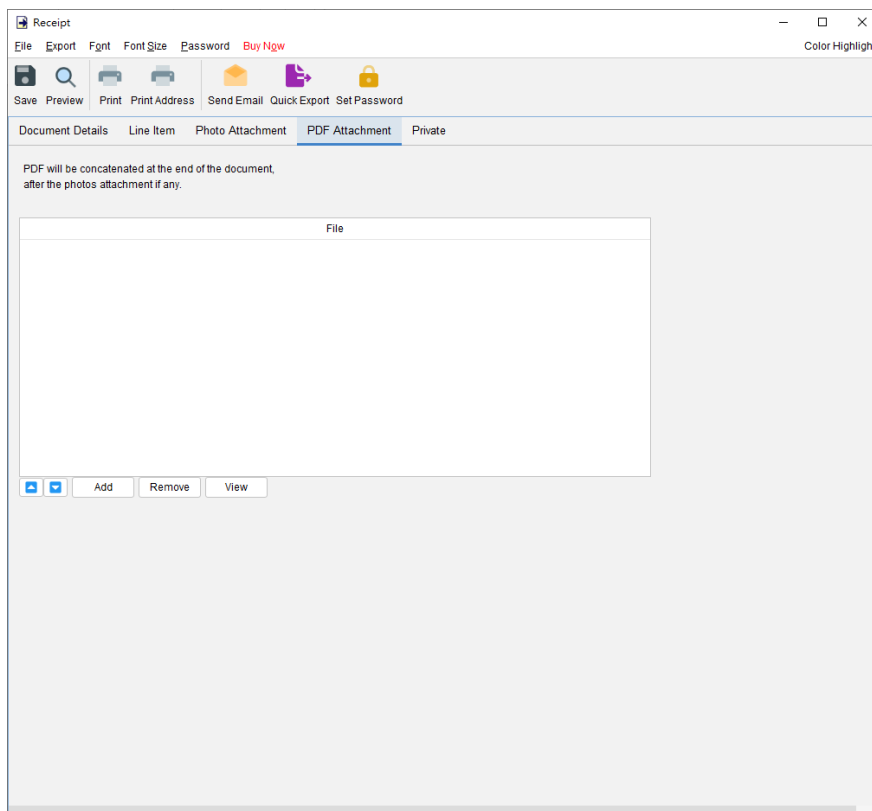
- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

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

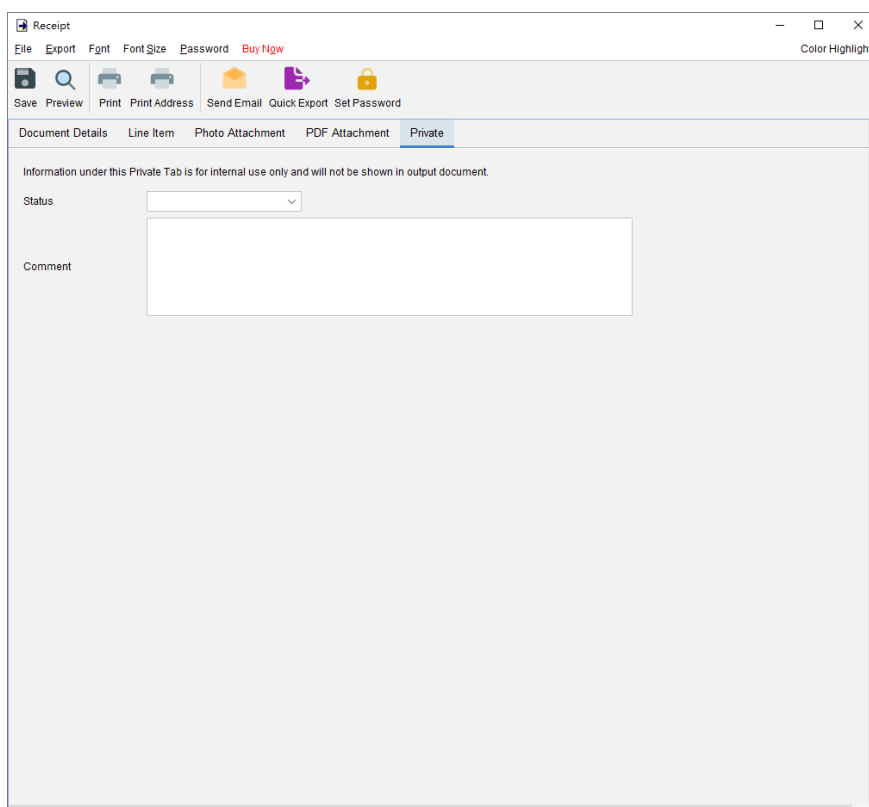
The screenshot shows a software window titled 'Receipt' with a standard menu bar (File, Export, Font, Font Size, Password, Buy Now) and a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. Below the toolbar are tabs for Document Details, Line Item, Photo Attachment (selected), PDF Attachment, and Private. The main area contains the text 'Photo attachments will be listed after the document.' and six layout selection buttons: 'One photo in one page' (selected), 'Two photos in one page', 'Six photos (2x3) in one page', 'Eight photos (2x4) in one page', 'Ten photos (2x5) in one page', and 'Twelve photos (3x4) in one page'. There is a 'Border' checkbox which is unchecked. Below these is a large table with two columns: 'Caption' and 'File'. The table is currently empty. At the bottom of the window are four buttons: 'Add' (with a plus icon), 'Remove' (with a minus icon), 'Edit' (with a pencil icon), and 'View' (with an eye icon).



**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 be shown in the output.



## 4.6. Purchase Order

Purchase Order

File Export Font Font Size Password Buy Now

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice

Purchase Order No. 10000 Stamp Watermark

Currency Hong Kong Dollar, \$

Purchase Order Date 2023 - 11 - 08 (YYYY-MM-DD)

Suppliers Reference

Delivery Req'd By

Shipping Term

Payment Term

Supplier Info

Address

Tel

VAT No

Load from Supplier List Save to Supplier List Clear

Ship To

Address

Tel

VAT No

Load My Company Address Load from Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Supplier” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Purchase Order:

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

**Document Details** – Specify the header information of the Purchase Order, includes Number, Currency, Date, Payment/Shipping Term, and Customer Information. Supplier Information can be typed in directly or load from the Supplier List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Purchase Order' application window with the 'Document Details' tab selected. The interface includes a menu bar (File, Export, Font, Font Size, Password, Buy Ngw), a toolbar (Save, Preview, Print, Print Address, Send Email, Quick Export, Set Password), and a tabbed interface. The 'Document Details' tab contains the following fields and controls:

- ☐ Hide empty fields in output
- Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice (dropdown)
- Purchase Order No.: 10000 (with edit icon)
- Currency: Hong Kong Dollar, \$ (with add icon)
- Purchase Order Date: 2023 - 11 - 08 (YYYY-MM-DD) (with calendar icon)
- Suppliers Reference: (text field)
- Delivery Req'd By: (text field with calendar icon)
- Shipping Term: (dropdown with add icon)
- Payment Term: (dropdown with add icon)
- Supplier Info: (text field)
- Address: (text field)
- Tel: (checkbox)
- VAT No: (checkbox)
- Ship To: (text field)
- Address: (text field)
- Tel: (checkbox)
- VAT No: (checkbox)

At the bottom, there are buttons for 'Load from Supplier List', 'Save to Supplier List', 'Clear', 'Load My Company Address', 'Load from Customer List', and 'Clear'.

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

Purchase Order

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

ID	Description	Unit	Unit Price	Qty	Total

Add Remove Clear Clear All Extra Blank Line 0

☒ Sub-Total 0.00  
☒ Discount 0.00  
☐ Shipping  
☐ Total  
☒ Tax 0.00  
☐ Tax 2 0.00  
Total 0.00

☒ Notes B I U A+ A- A A

Load from Note List Save to Note List

☒ Left Signature Box  
Add "Company Chop"... Add "Signature" image  
Remove Remove

☒ Right Signature Box  
Add "Company Chop" i... Add "Signature" image  
Remove Remove

☒ Date - - 12

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Purchase Order

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

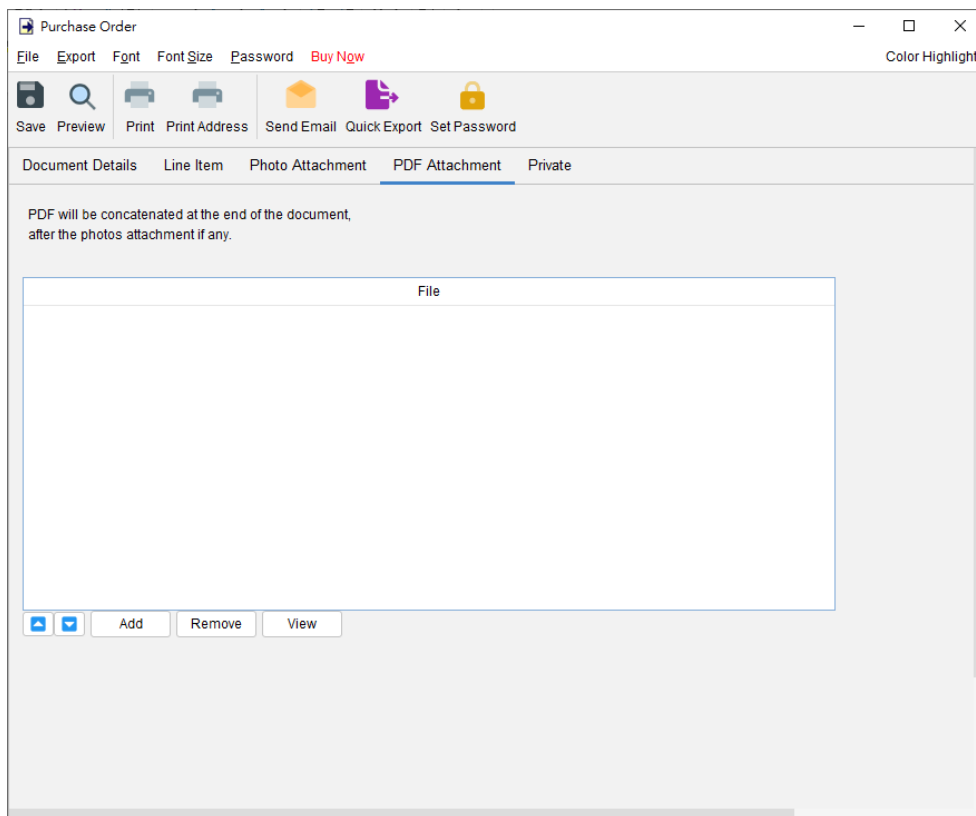
☒ One photo in one page ☐ Two photos in one page ☐ Six photos (2x3) in one page

☐ Eight photos (2x4) in one page ☐ Ten photos (2x5) in one page ☐ Twelve photos (3x4) in one page

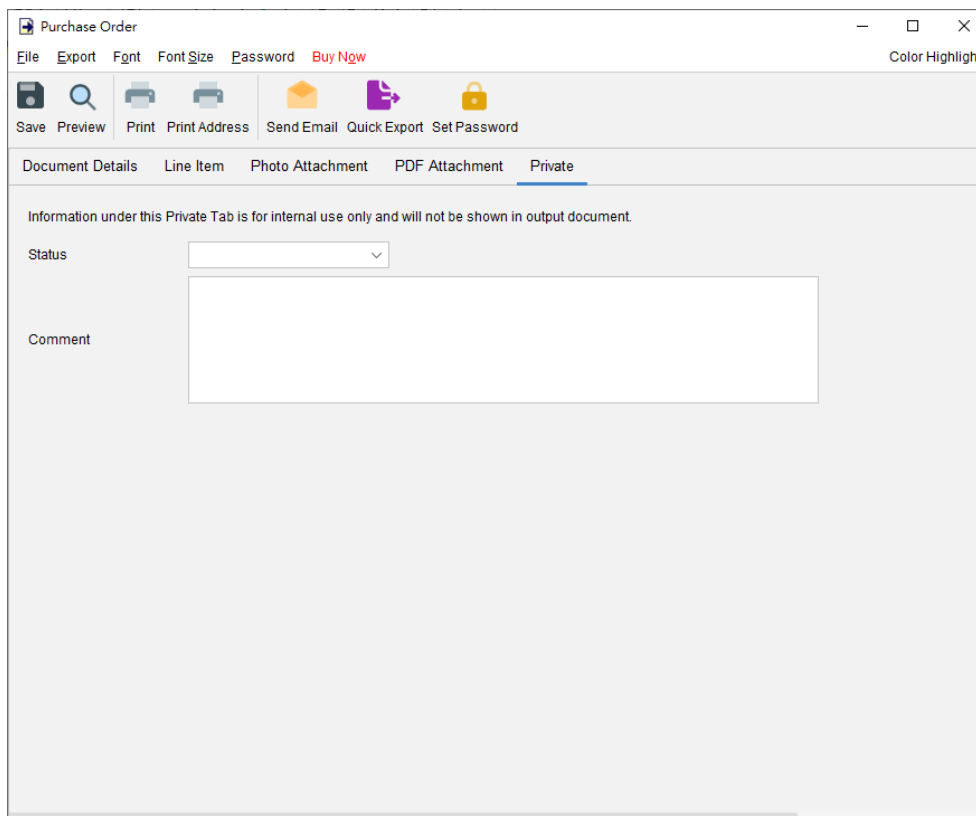
☐ Border

Caption	File
---------	------

**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 be shown in the output.



## 4.7. Delivery Note

Delivery Note

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt

Delivery Note No. 10002 Stamp Watermark

Date 2023 - 11 - 08 (YYYY-MM-DD)

Invoice No.

Delivery Date/Time

Delivery Term

Notes

Customer Information

Delivery To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Delivery To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Delivery Note:

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

**Document Details** – Specify the header information of the Delivery Note, includes Number, Date, Delivery Date/Time, Delivery Term and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Delivery Note' application window. The title bar includes standard window controls and a 'Color Highlight' button. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar includes icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main interface has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt' button. The form fields include: 'Delivery Note No.' (10002), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Date' (2023-11-08), 'Invoice No.' (empty), 'Delivery Date/Time' (empty), 'Delivery Term' (dropdown), and 'Notes' (text area). The 'Customer Information' section includes 'Delivery To' and 'Address' (multiple lines), 'Tel' (checkbox), and 'VAT No' (checkbox). At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.



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

Delivery Note

File Export Font Font Size Password Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

ID	Description	Unit	Qty

Add Remove Clear Clear All Extra Blank Line 0

☒ Total Quantity 0

☒ Notes **B** *I* U **A+** **A-** **A** **A**

Load from Note List Save to Note List

☒ Left Signature Box

Add "Company Chop"... Add "Signature" image

Remove Remove

☒ Date - - 12

☒ Right Signature Box

Add "Company Chop" ima... Add "Signature" image

Remove Remove

☒ Date - - 12

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Delivery Note

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

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 Twelve photos (3x4) in one page

☐ Border

Caption	File

Add Remove Edit View

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

The screenshot shows the 'Delivery Note' application window with the 'PDF Attachment' tab selected. The window has a title bar with 'Delivery Note' and standard window controls. Below the title bar is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. A toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'PDF Attachment' tab is active, displaying a message: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this message is a large empty rectangular box labeled 'File'. At the bottom of this box are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Delivery Note' application window with the 'Private' tab selected. The window has the same title bar and menu bar as the previous screenshot. The toolbar is also present. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Private' tab is active, displaying a message: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this message are two form fields: a 'Status' dropdown menu and a 'Comment' text area.

## 4.8. Packing Slip

The screenshot shows the 'Packing Slip' window in the EasyBilling application. The window has a title bar with standard OS controls. Below the title bar is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and a 'Buy Now' link. A toolbar follows, containing icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area is divided into tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a dropdown menu to 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'. Below these are input fields for 'Packing Slip No.' (with a value of 10000), 'Stamp', and 'Watermark', each with a green plus icon for adding attachments. A date picker shows '2023 - 11 - 08' in 'YYYY-MM-DD' format. There are also fields for 'Invoice No.', 'Order Number', and 'Shipping Term'. A 'Customer Information' section contains a 'Ship To' field, an 'Address' field with multiple lines, and checkboxes for 'Tel' and 'VAT No'. At the bottom right of the form are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Packing Slip:

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

**Document Details** – Specify the header information of the Packing Slip, includes Number, Currency, Date, Shipping Term, Order Number and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Packing Slip' application window. The title bar includes standard window controls and a 'Color Highlight' button. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar features icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main interface has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt' button. The form fields include: 'Packing Slip No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Date' (2023-11-08), 'Invoice No.', 'Order Number', and 'Shipping Term' (dropdown). The 'Customer Information' section has a 'Ship To' label, an 'Address' field with multiple lines, and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

ID	Description	Qty	Date Ordered	Date Received

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Packing Slip

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

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 Twelve photos (3x4) in one page

☐ Border

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

The screenshot shows the 'PDF Attachment' tab selected in the 'Packing Slip' window. The window has a title bar with 'Packing Slip' and standard window controls. Below the title bar is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. A toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment' (selected), and 'Private'. Below the tabs, a message states: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' A large empty rectangular box labeled 'File' is provided for uploading a PDF. At the bottom of this box are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Private' tab selected in the 'Packing Slip' window. The window structure is identical to the previous screenshot. The 'Private' tab is active, displaying a message: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this message, there is a 'Status' label next to a dropdown menu, and a 'Comment' label next to a large text input area.



## 4.9. Ordering

Ordering

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt

Ordering No. 10000 Stamp Watermark

Date 2023 - 11 - 08 (YYYY-MM-DD)

Invoice No.

Delivery Date/Time

Delivery Term

Notes

Customer Information

Delivery To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Delivery To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Ordering:

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

**Document Details** – Specify the header information of the Ordering, includes Number, Currency, Date, Delivery Date/Time, Delivery Term and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Ordering' application window. The title bar includes standard window controls and the text 'Ordering'. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar features icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. Below the toolbar is a tabbed interface with five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab contains the following fields and controls:

- A checkbox for 'Hide empty fields in output'.
- A dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'.
- 'Ordering No.' field with the value '10000' and an edit icon.
- 'Stamp' dropdown menu with a '+' button.
- 'Watermark' dropdown menu with a '+' button.
- 'Date' field with a date picker showing '2023 - 11 - 08' and the format '(YYYY-MM-DD) 12'.
- 'Invoice No.' field.
- 'Delivery Date/Time' field with a date picker showing '12'.
- 'Delivery Term' dropdown menu with a '+' button.
- 'Notes' text area.
- 'Customer Information' section with fields for 'Delivery To' and 'Address'.
- Checkboxes for 'Tel' and 'VAT No'.
- Buttons at the bottom right: 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

The screenshot shows the 'Ordering' application window with the 'Line Item' tab selected. The window has a menu bar (File, Export, Font, Font Size, Password, Buy Ngw) and a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. Below the toolbar are tabs for Document Details, Line Item, Photo Attachment, PDF Attachment, and Private. The 'Line Item' tab contains a table with columns: ID, Description, Qty, Date Ordered, and Date Received. Below the table is a toolbar with buttons: Add, Remove, Clear, Clear All, Extra Blank Line (with a dropdown showing 0), and a 'Notes' checkbox. The 'Notes' section has a large text area and buttons for 'Load from Note L...' and 'Save to Note List'. At the bottom, there are two signature boxes, 'Left Signature Box' and 'Right Signature Box', each with 'Add "Company Chop"...' and 'Add "Signature" image' buttons, and 'Remove' buttons. Each signature box also has a 'Date' field with a calendar icon.

ID	Description	Qty	Date Ordered	Date Received

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Ordering

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

1 One photo in one page 2 Two photos in one page Six photos (2x3) in one page

Eight photos (2x4) in one page Ten photos (2x5) in one page Twelve photos (3x4) in one page

☐ Border

Caption	File
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Add Remove Edit View

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

The screenshot shows the 'Ordering' window with the 'PDF Attachment' tab selected. The window has a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'PDF Attachment' tab is active, showing a text area for a file. Above the text area, it says 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below the text area are buttons for 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Ordering' window with the 'Private' tab selected. The window has a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Private' tab is active, showing a text area for a comment. Above the text area, it says 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below the text area are buttons for 'Add', 'Remove', and 'View'.

## 4.10. Packing List

Packing List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Invoice, Tax Invoice

Packing List No. 10000 Stamp Watermark

Date 2023 - 11 - 08 (YYYY-MM-DD)

Invoice No.

Ref No.

P.O. Number

Salesman

Customer Information

Ship To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Packing List:

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

**Document Details** – Specify the header information of the Packing List, includes Number, Currency, Date, Ref No., PO Number, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Invoice or Tax Invoice, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Packing List' application window. The title bar includes standard window controls and a 'Color Highlight' button. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar features icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a 'Generate from Invoice, Tax Invoice' button. The form fields include: 'Packing List No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Date' (2023-11-08), 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman' (dropdown). The 'Customer Information' section has a 'Ship To' label and a multi-line address field. At the bottom, there are checkboxes for 'Tel' and 'VAT No', and three buttons: 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

Marks	Carton No.	Item Name/Des...	Item Code	No. of CTN	Qty Per C...	QTY	G.W. (KG)	N.W. (KG)	Length (C...	Width (CM)	Height (CM)	CBM Per ...	CBM

☒ Total Carton 0

☒ Total Quantity 0

☒ Total Measuremen... 0.00

☒ Total Gross Weigh... 0.00

☒ Total Net Weight (... 0.00

☒ Notes

☒ Left Signature Box

☒ Right Signature Box

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.



**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Packing List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

☒ 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 ☐ Twelve photos (3x4) in one page

☐ Border

Caption	File
---------	------

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

The screenshot shows the 'PDF Attachment' tab selected in the 'Packing List' application. The interface includes a top menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'PDF Attachment' tab is active, displaying a text box with the message: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this text box is a large empty rectangular area labeled 'File' for uploading a PDF. At the bottom of this area are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Private' tab selected in the 'Packing List' application. The interface is similar to the previous one, with the same top menu and toolbar. The 'Private' tab is active, displaying a text box with the message: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this text box are two input fields: a 'Status' dropdown menu and a 'Comment' text area.

## 4.11. Weight List

Weight List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Invoice, Tax Invoice

Weight List No. 10000 Stamp Watermark

Date 2023 - 11 - 08 (YYYY-MM-DD)

Invoice No.

Ref No.

P.O. Number

Salesman

Customer Information

Ship To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Ship To” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Weight List:

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

**Document Details** – Specify the header information of the Weight List, includes Number, Currency, Date, PO Number, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Invoice or Tax Invoice, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Weight List' application window. The title bar includes standard window controls and a 'Color Highlight' button. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar features icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The 'Document Details' tab is active, showing a 'Generate from Invoice, Tax Invoice' button. Below this, there are input fields for 'Weight List No.' (10000), 'Date' (2023-11-08), 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman'. A 'Stamp' dropdown menu and a 'Watermark' dropdown menu are also present. The 'Customer Information' section includes fields for 'Ship To', 'Address', 'Tel', and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Weight List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Invoice, Tax Invoice

Weight List No. 10000 Stamp Watermark

Date 2023 - 11 - 08 (YYYY-MM-DD)

Invoice No.

Ref No.

P.O. Number

Salesman

Customer Information

Ship To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

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

The screenshot shows the 'Weight List' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has tabs for 'Document Details', 'Line Item' (selected), 'Photo Attachment', 'PDF Attachment', and 'Private'. Below the tabs is a table with 5 columns: ID, Description, QTY, Weight, and Total Weight. The 'Total Weight' column is highlighted in yellow. Below the table are buttons for 'Add', 'Remove', 'Clear', 'Clear All', and 'Extra Blank Line'. There are also checkboxes for 'Total Quantity', 'Total Net Weight', and 'Total Weight', each with a corresponding yellow input field. Below these are checkboxes for 'Notes' and a text area. At the bottom, there are two signature boxes, each with a 'Left Signature Box' and 'Right Signature Box' section, containing 'Add "Company Chop"...' and 'Add "Signature" im...' buttons, and 'Remove' buttons. There are also date pickers for both signature boxes.

ID	Description	QTY	Weight	Total Weight

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Weight List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

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 Twelve photos (3x4) in one page

☐ Border

Caption	File
---------	------

Add Remove Edit View

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

The screenshot shows the 'Weight List' application window with the 'PDF Attachment' tab selected. The interface includes a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'PDF Attachment' tab is active, displaying a text box with the message: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular area labeled 'File' for attaching PDF files. At the bottom of this area are three buttons: 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Weight List' application window with the 'Private' tab selected. The interface is consistent with the previous screenshot, but the 'Private' tab is active. The main content area displays a message: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this message are two input fields: a 'Status' dropdown menu and a 'Comment' text area.

## 4.12. Credit Note

Credit Note

File Export Font Font Size Password Buy Now

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

☐ Hide empty fields in output

Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt

Credit Note No. 10000 Stamp Watermark

Currency Hong Kong Dollar, \$

Date 2023 - 11 - 08 (YYYY-MM-DD)

Customer Information

To

Address

☐ Tel

☐ VAT No

Load from Customer List Save to Customer List Clear

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Customer” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.



There are five parts in Credit Note:

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

**Document Details** – Specify the header information of the Credit Note, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows a web application window titled "Credit Note". The interface includes a menu bar with "File", "Export", "Font", "Font Size", "Password", and "Buy Now". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Print Address", "Send Email", "Quick Export", and "Set Password". The main content area has five tabs: "Document Details", "Line Item", "Photo Attachment", "PDF Attachment", and "Private". The "Document Details" tab is active, showing a form with the following fields:

- ☐ Hide empty fields in output
- Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt (dropdown)
- Credit Note No. 10000 (text field with edit icon)
- Stamp (dropdown with add icon)
- Watermark (dropdown with add icon)
- Currency Hong Kong Dollar, \$ (dropdown with add icon)
- Date 2023 - 11 - 08 (YYYY-MM-DD format with calendar icon)
- Customer Information section with fields for To, Address, Tel, and VAT No.
- Buttons at the bottom: Load from Customer List, Save to Customer List, and Clear.

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

The screenshot displays the 'Credit Note' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and a 'Buy Now' button. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. A tabbed interface shows 'Document Details', 'Line Item' (selected), 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab contains a table with columns: ID, Description, Unit, Unit Price, Qty, and Total. The 'Total' column is highlighted in yellow. Below the table are buttons for 'Add', 'Remove', 'Clear', 'Clear All', and an 'Extra Blank Line' spinner set to 0. To the right, a summary section shows checkboxes for 'Total', 'Tax', and 'Tax 2', each with a corresponding yellow-highlighted value of 0.00. Below this is a 'Notes' section with a text area and formatting buttons (B, I, U, A+, A-, A, A). At the bottom, there are two signature boxes, 'Left Signature Box' and 'Right Signature Box', each with 'Add "Company Chop"...' and 'Add "Signature" image' buttons, and a 'Date' field with a calendar icon.

ID	Description	Unit	Unit Price	Qty	Total

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

Credit Note

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

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

Photo attachments will be listed after the document.

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 Twelve photos (3x4) in one page

☐ Border

Caption	File
---------	------

Add Remove Edit View

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

The screenshot shows the 'Credit Note' application window. The 'PDF Attachment' tab is selected, displaying a large empty rectangular area for file uploads. Above this area, a message states: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below the upload area are three buttons: 'Add', 'Remove', and 'View'. The application's toolbar includes options like 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Private' tab is also visible in the tab bar.

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

The screenshot shows the 'Credit Note' application window with the 'Private' tab selected. A message at the top reads: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this, there is a 'Status' dropdown menu and a large text area for 'Comment'. The application's toolbar and tab bar are consistent with the previous screenshot.

## 4.13. Debit Note

The **Menu Bar** at the top of the window includes:

**File** – 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, Font Size** – Specify the font and font size for the document.

**Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

**Save** – Save document

**Preview** – Preview document in PDF viewer

**Print** – Print document

**Print Address** – Print “Customer” address on envelop or address label

**Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

**Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

**Set Password** – Set a password to protect the document.

There are five parts in Debit Note:

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

**Document Details** – Specify the header information of the Debit Note, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Debit Note' application window. The title bar includes standard window controls and a 'Color Highlight' button. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar features icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. Below the toolbar are five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab contains the following fields and controls:

- A checkbox for 'Hide empty fields in output'.
- A dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'.
- 'Debit Note No.' field with the value '10000' and an edit icon.
- 'Stamp' dropdown menu and a green '+' button.
- 'Watermark' dropdown menu and a green '+' button.
- 'Currency' dropdown menu with 'Hong Kong Dollar, \$' and a green '+' button.
- 'Date' field with '2023 - 11 - 08' and a calendar icon.
- 'Customer Information' section with fields for 'To' and 'Address'.
- Checkboxes for 'Tel' and 'VAT No'.
- Buttons at the bottom right: 'Load from Customer List', 'Save to Customer List', and 'Clear'.

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

The screenshot shows the 'Debit Note' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has tabs for 'Document Details', 'Line Item' (selected), 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab contains a table with columns: ID, Description, Unit, Unit Price, Qty, and Total. The table has 8 rows, with the last row highlighted in yellow. Below the table is a control bar with buttons for 'Add', 'Remove', 'Clear', 'Clear All', and a dropdown for 'Extra Blank Line' (set to 0). To the right of the control bar is a summary section with checkboxes for 'Total', 'Tax', and 'Tax 2', each with a corresponding value of 0.00. Below this is a 'Notes' section with a checkbox and a text area. At the bottom are two signature boxes, each with a checkbox, a text area for 'Company Chop', a text area for 'Signature', and a 'Remove' button. Each signature box also has a date field with a calendar icon.

ID	Description	Unit	Unit Price	Qty	Total

Summary:

<input type="checkbox"/> Total	0.00
<input checked="" type="checkbox"/> Tax	0.00
<input checked="" type="checkbox"/> Tax 2	0.00
<b>Total</b>	<b>0.00</b>

Notes: ☒ Notes

Signature Boxes:

☒ Left Signature Box

☒ Right Signature Box

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

**Photo Attachment** – Photos can be attached to the end of quotation. Six 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
- Twelve photos (3x4) in one page

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

The screenshot shows the 'Debit Note' application window. The top menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and a 'Buy Now' link. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main window has tabs for 'Document Details', 'Line Item', 'Photo Attachment' (which is selected), 'PDF Attachment', and 'Private'. Under the 'Photo Attachment' tab, a message states 'Photo attachments will be listed after the document.' Below this, there are six layout selection buttons: 'One photo in one page' (selected), 'Two photos in one page', 'Six photos (2x3) in one page', 'Eight photos (2x4) in one page', 'Ten photos (2x5) in one page', and 'Twelve photos (3x4) in one page'. There is also a 'Border' checkbox which is currently unchecked. Below these options is a large table with two columns: 'Caption' and 'File'. The table is currently empty. At the bottom of the window, there are four buttons: 'Add', 'Remove', 'Edit', and 'View'.



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

The screenshot shows the 'Debit Note' application window with the 'PDF Attachment' tab selected. The interface includes a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'PDF Attachment' tab is active, displaying a text box with the message: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular area labeled 'File' for uploading PDFs. At the bottom of this area are buttons for 'Add', 'Remove', and 'View'.

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

The screenshot shows the 'Debit Note' application window with the 'Private' tab selected. The interface is similar to the previous screenshot, but the 'Private' tab is active. The main content area displays a message: 'Information under this Private Tab is for internal use only and will not be shown in output document.' Below this message are two input fields: a 'Status' dropdown menu and a 'Comment' text area.

### 4.14. Batch Create

The Batch Create function allows you to create documents for multiple customers with the same content. It has a similar user interface to a normal document, but it allows you to add multiple customers. You can add customers by selecting a Customer Category, selecting individual customers from the Customer List, or inputting customer information manually.

When the document is ready, click the [Batch Create] button at the top. EasyBilling will generate an individual document for every customer.

Quotation

FileFontFont SizeBuy Now

Batch CreatePreview

Document DetailsLine ItemPhoto AttachmentPDF AttachmentPrivate

☐

Hide empty fields in output

Quote No.

QUO-202311-10002

Stamp

Watermark

Currency

Hong Kong Dollar, \$

Date

2023

-

11

-

08

(YYYY-MM-DD)

Sales Rep.

Customer Ref. No.

Shipping Date

Shipping Term

Payment Term

Customer Information

By Category

By Customer

Manual

Edit

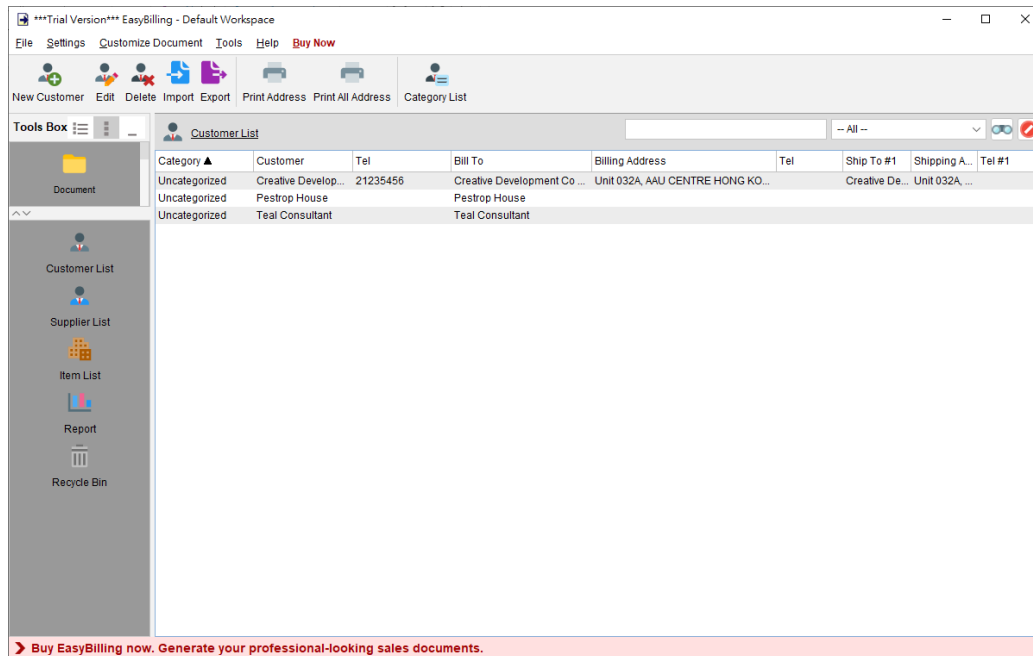
Remove

Quote To	Address	Ship To	Address
----------	---------	---------	---------

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## 5. CUSTOMER LIST

On the main screen of EasyBilling, user can access the Customer List by clicking on the [Customer List] icon located on the left-hand side.



The Customer List serves as a repository for storing all customer information. When preparing a document, users have the option to load customer information directly from the Customer List.

The Tool Bar in the Customer List provides several useful functions, including:

**New:** Add a new customer to the list.

**Edit:** Modify the details of the selected customer.

**Delete:** Remove the selected customer from the list.

**Import:** Import customers from an XLS file.

**Export:** Export the entire customer list into PDF, XLS, or HTML format.

**Print Address:** Print the address of the selected customer on a label.

**Print All Address:** Print the addresses of all customers on labels.

**Category List:** Manage customer categories for better organization and classification.

Within the Customer List, customers are displayed in a table format, providing a clear overview of their information. Users may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling users to quickly locate specific customers by entering relevant search terms.

## 5.1. Create Customer

When creating a new customer, user can navigate to the "General" tab and input the customer's name and contact information. Customers can also be assigned to a specific group, facilitating efficient search or batch document creation. Furthermore, user can specify preferences for shipping terms, payment terms, item categories, and sales discounts for each customer. These preferences will be automatically applied when preparing documents for the respective customer.

The screenshot shows the 'Customer' form with the 'General Info' tab selected. The form includes a 'Category' dropdown menu set to 'Uncategorized'. Below this are input fields for 'Customer', 'Tel', 'Fax', and 'Email'. A 'Preferences' section contains dropdown menus for 'Shipping Term', 'Payment Term', and 'Item Category', along with a 'Sales Discount %' input field set to '0.00'. At the bottom, there are 'Save' and 'Cancel' buttons.

In the "Address" tab, users can enter the “Bill To” and “Ship To” addresses for the customer. It is possible to input up to three shipping addresses. The address information entered in this section will be automatically loaded when creating documents for the customer, streamlining the workflow and ensuring accurate details.

The screenshot shows the 'Customer' form with the 'Address' tab selected. The 'Bill To Information' section has input fields for 'Bill To', 'Billing Address' (a multi-line text area), 'Tel', and 'Vat No'. Below this is a blue double-headed arrow. The 'Ship To Information' section features three columns for 'Address #1', 'Address #2', and 'Address #3'. Each column has input fields for 'Ship To', 'Shipping Address' (a multi-line text area), 'Tel', and 'Vat No'. At the bottom, there are 'Save' and 'Cancel' buttons.

## 5.2. Import Customer

EasyBilling offers the capability to import customers from an Excel file, providing a convenient method for bulk importing customer information.

To successfully import customers, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.

Import Customer

Please ensure import file follows the format of "Sample File".  
[Click here to download "Sample Import File"](#)

Import file :

Import Progress

0%

In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Customer information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific customer, the corresponding cell can be left empty.

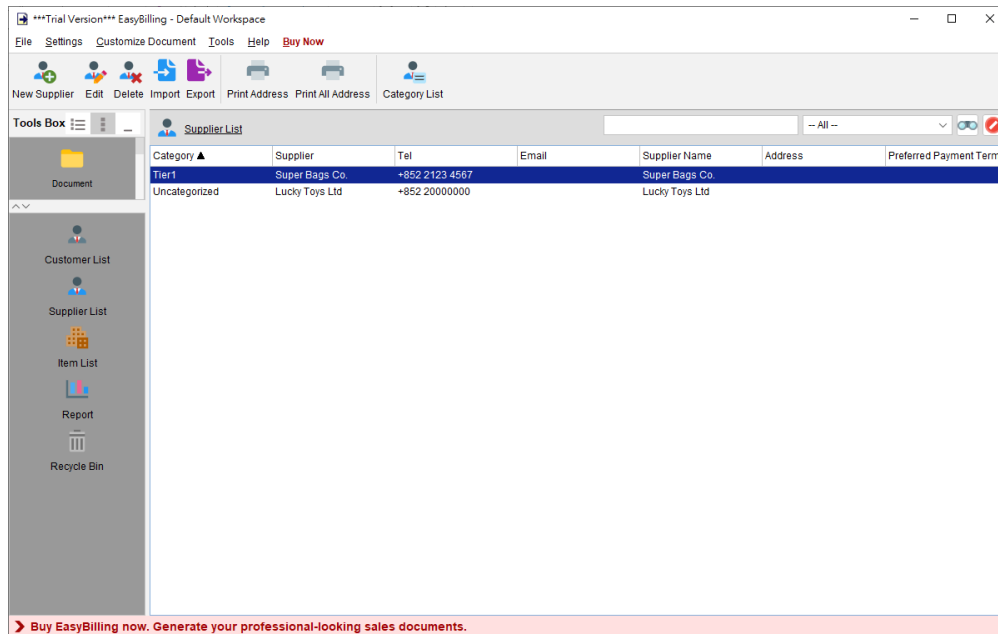
	A	B	C	D	E	F	G	H
1	Category	Customer	Phone	Fax	Email	Bill To	Billing Address	Billing Tel
2	Uncategorized	Alan Smith	21234567	31234567	001@abc.com	ABC Cor TUV Country	Unit 001 ABCD Road JKL District MNO Province 00001	812345
3	Uncategorized	Robert Lee	23456789	33456789	002@def.com	DEF Cor 002 Unit		833456
4	Uncategorized	Richard	24567890	34567890	003@ghi.com	GHI Com 003 Unit		845678
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

importCustomer

Ready Accessibility: Unavailable

## 6. SUPPLIER LIST

On the main screen of EasyBilling, user can access the Supplier List by clicking on the [Supplier List] icon located on the left-hand side.



The Supplier List serves as a repository for storing all supplier information. When preparing a Purchase Order, users have the option to load supplier information directly from the Supplier List.

The Tool Bar in the Supplier List provides several useful functions, including:

**New:** Add a new supplier to the list.

**Edit:** Modify the details of the selected supplier.

**Delete:** Remove the selected supplier from the list.

**Import:** Import suppliers from an XLS file.

**Export:** Export the entire supplier list into PDF, XLS, or HTML format.

**Print Address:** Print the address of the selected supplier on a label.

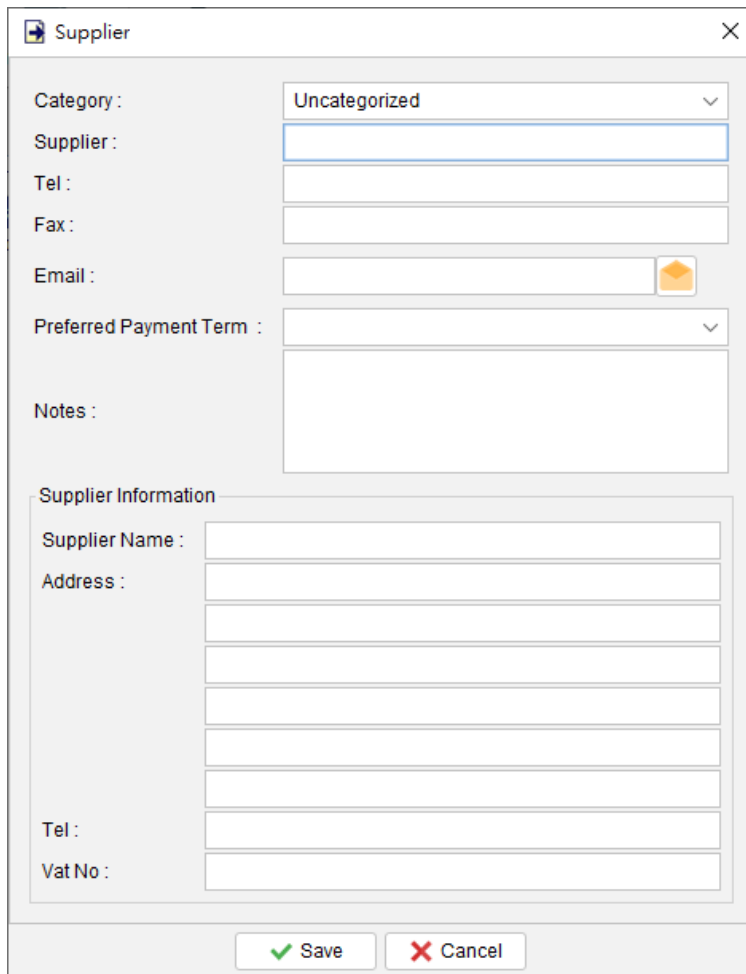
**Print All Address:** Print the addresses of all suppliers on labels.

**Category List:** Manage supplier categories for better organization and classification.

Within the Supplier List, suppliers are displayed in a table format, providing a clear overview of their information. Users may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling users to quickly locate specific suppliers by entering relevant search terms.

## 6.1. Create Supplier

When creating a new supplier, user can input the supplier's name and contact information. Supplier can also be assigned to a specific group, facilitating efficient search or batch document creation. Furthermore, user can specify preferences for payment terms for each supplier. These preferences will be automatically applied when preparing documents for the respective supplier.



The screenshot shows a 'Supplier' form window with the following fields and sections:

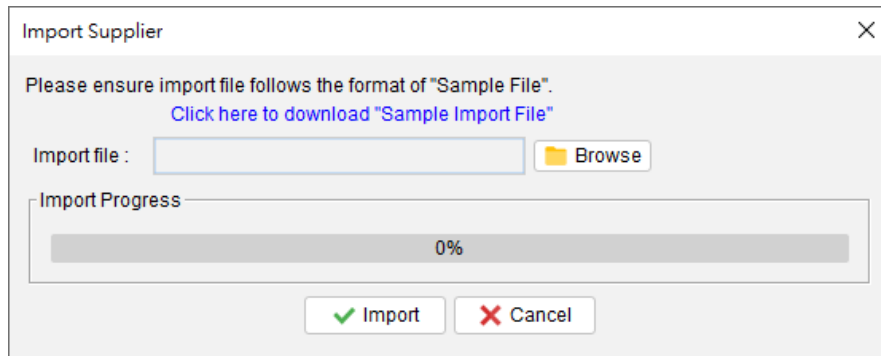
- Category :** A dropdown menu currently set to 'Uncategorized'.
- Supplier :** A text input field.
- Tel :** A text input field.
- Fax :** A text input field.
- Email :** A text input field with an email icon on the right.
- Preferred Payment Term :** A dropdown menu.
- Notes :** A large text area for notes.
- Supplier Information** (Section Header):
  - Supplier Name :** A text input field.
  - Address :** A series of five stacked text input fields.
  - Tel :** A text input field.
  - Vat No :** A text input field.

At the bottom of the form, there are two buttons: a green 'Save' button and a red 'Cancel' button.

## 6.2. Import Supplier

EasyBilling offers the capability to import suppliers from an Excel file, providing a convenient method for bulk importing supplier information.

To successfully import suppliers, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.



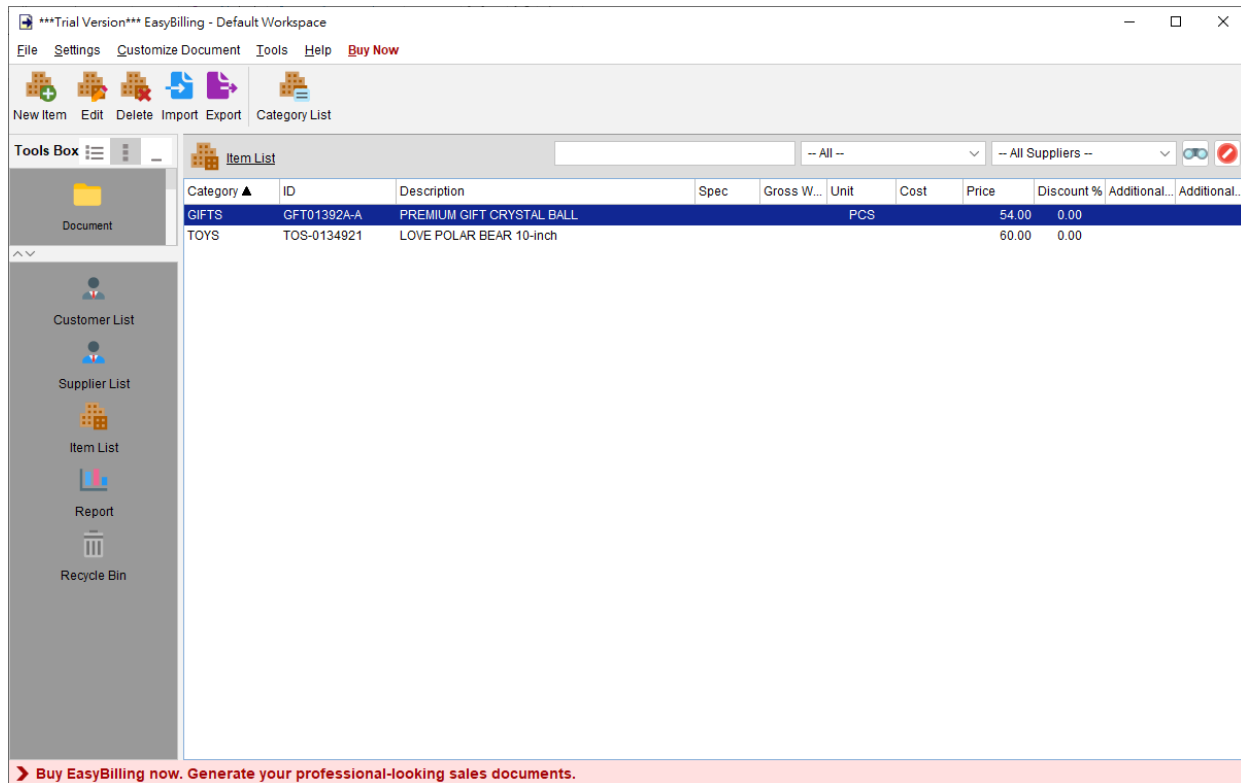
In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Supplier information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific supplier, the corresponding cell can be left empty.

	A	B	C	D	E	F	G
1	Category	Supplier	Phone	Fax	Email	Supplier Name	Address
2	Uncategorized	Company ABC	21234567	31234567	001@abc.com	Mr. 001	001 Co
3	Uncategorized	Company DEF			002@abc.com	Mr. 002	002 Co
4	Uncategorized	Company GHI	21234567	31234567	003@abc.com	Mr. 003	003 Co
5							
6							
7							
8							
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10							
11							
12							
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14							
15							
16							
17							



## 7. ITEM LIST

On the main screen of EasyBilling, user can access the Item List by clicking on the [Item List] icon located on the left-hand side.



The Item List serves as a repository for storing all item or product information. When preparing a document, users have the option to load item information directly from the Item List.

The Tool Bar in the Item List provides several useful functions, including:

**New:** Add a new item to the list.

**Edit:** Modify the details of the selected item.

**Delete:** Remove the selected item from the list.

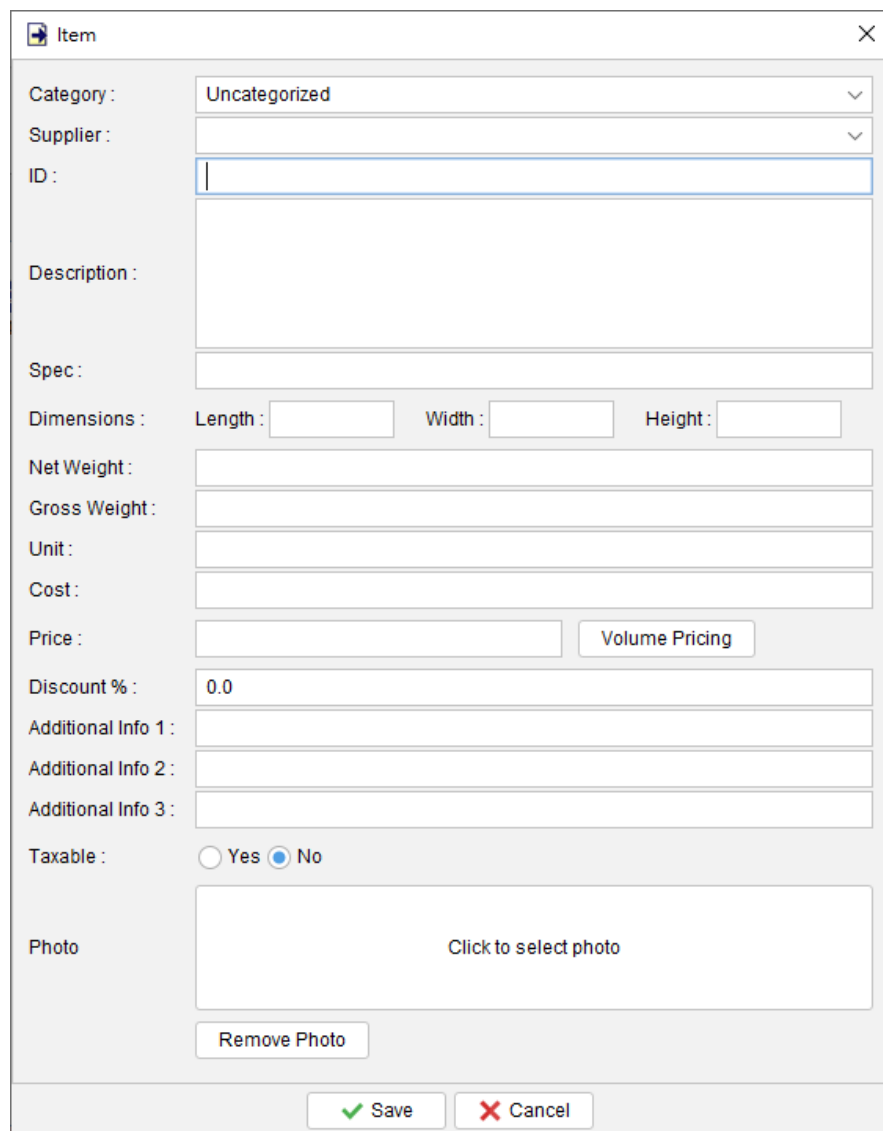
**Import:** Import items from an XLS file.

**Export:** Export the entire item list into PDF, XLS, or HTML format.

**Category List:** Manage supplier categories for better organization and classification.

Within the Item List, items are displayed in a table format, providing a clear overview of their information. Users may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling users to quickly locate specific items by entering relevant search terms.

## 7.1. Create Item



The 'Item' form contains the following fields and controls:

- Category: Dropdown menu (Uncategorized)
- Supplier: Dropdown menu
- ID: Text input field
- Description: Large text area
- Spec: Text input field
- Dimensions: Length, Width, Height (Text input fields)
- Net Weight: Text input field
- Gross Weight: Text input field
- Unit: Text input field
- Cost: Text input field
- Price: Text input field and Volume Pricing button
- Discount %: Text input field (0.0)
- Additional Info 1: Text input field
- Additional Info 2: Text input field
- Additional Info 3: Text input field
- Taxable: Radio buttons (Yes, No) with 'No' selected
- Photo: Click to select photo button and Remove Photo button
- Save and Cancel buttons at the bottom

When adding a new item in EasyBilling, users have the flexibility to input various details, including the item's ID, description, dimensions, and weight. Additionally, users can choose to assign a single price or establish volume pricing for different quantities.

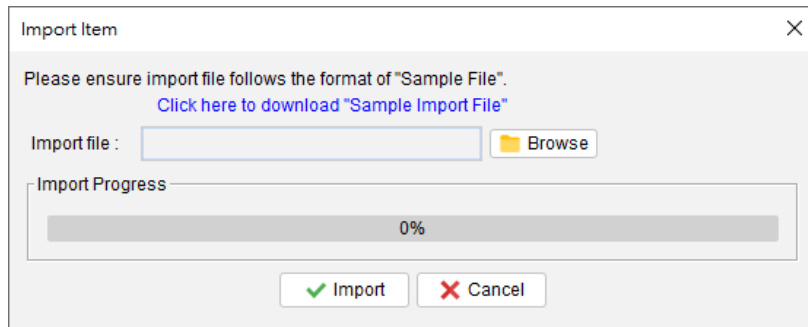
To accommodate specific requirements or additional information, EasyBilling provides three extra fields where users can input their own custom data that may not fit into the standard fields provided.

Moreover, users have the option to include a photo for each item. The photo can be added into the line item of the document.

## 7.2. Import Item

EasyBilling offers the capability to import items from an Excel file, providing a convenient method for bulk importing item information.

To successfully import items, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.

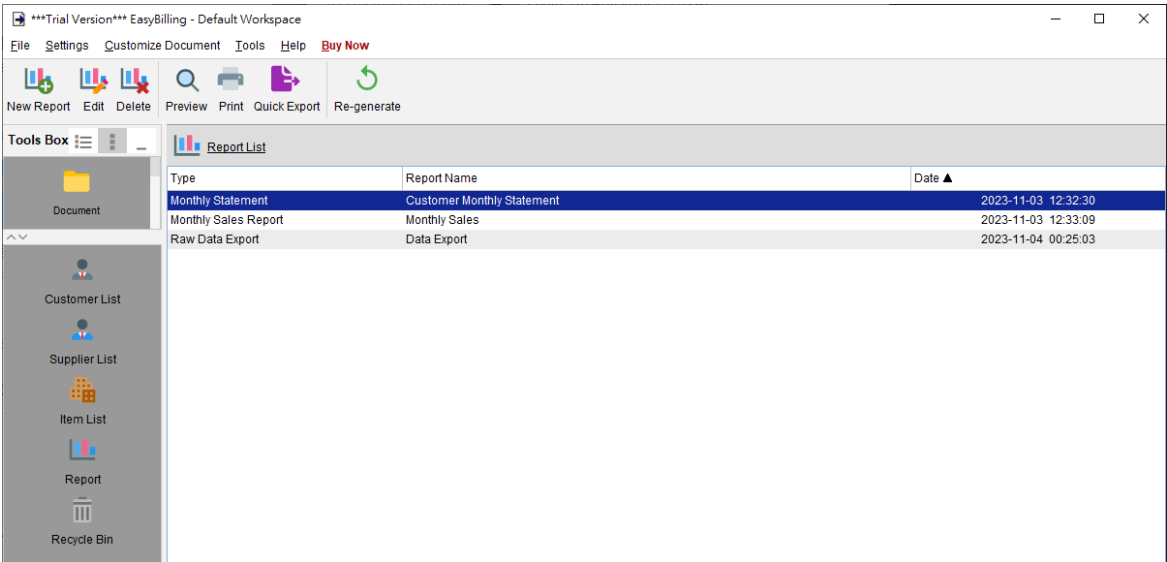


In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Item information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific item, the corresponding cell can be left empty.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Category	Supplier	ID	Description	Size	Length	Width	Height	Net We	Gross V	Unit	Cost
2	Uncatego	ABC Com	1	Product 001	S	3	4	5	0.6	1.2	KG	
3	Uncatego	ABC Com	2	Product 002	M	6	7	8	1.7	2.3	LOT	
4	Uncatego	DEF Com	3	Product 003	L	8	9	10	2.8	3.4	PCS	
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18												
19												
20												
21												
22												
23												

## 8. REPORT

On the main screen of EasyBilling, users can access the Report section by clicking on the [Report] icon located on the left-hand side.



At the top of the Report screen, users will find the Tool Bar, which offers a range of functionalities to manage reports efficiently. The icons available in the Tool Bar include:

**New** - Create a new report. EasyBilling provides 15 pre-designed report templates including:

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

**Edit** - Modify the selected report.

**Delete** - Remove the selected report.

**Preview** - View a preview of the selected report in PDF format.

**Print** - Print out the selected report.

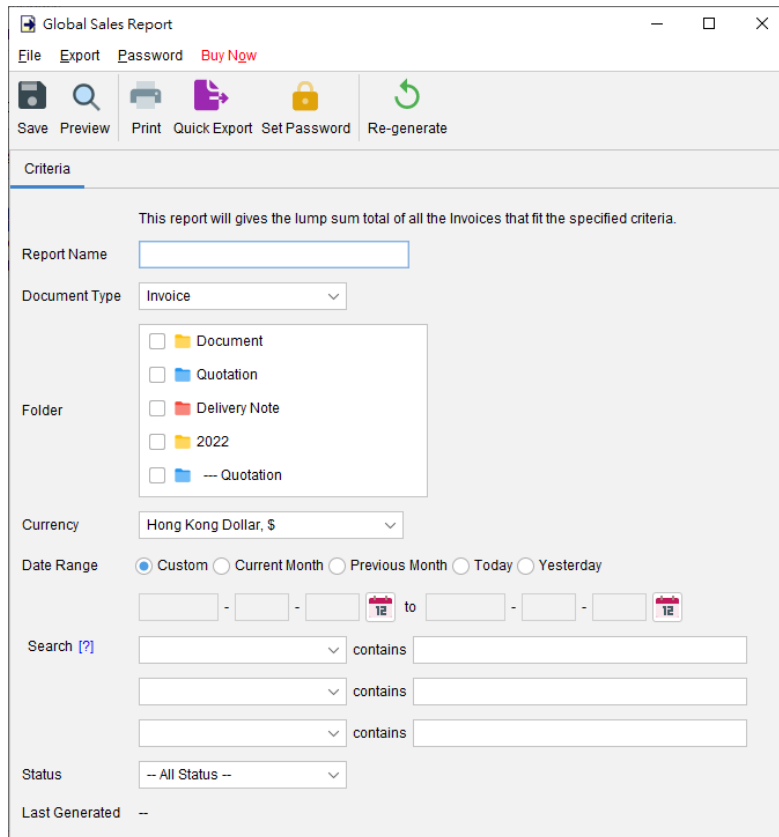
**Quick Export** - Export the selected report to a specific location and format based on the Quick Export settings configured by the user.

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

The saved reports will be displayed in a table format for easy reference and access.

## 8.1. Global Sales Report

Global Sales Report provides an overview of sales performance metrics. It aggregates data from invoice or tax invoice and provides: Number of invoices issued, Total sales amount, Total deposits received, Total balance due.



The screenshot shows the 'Global Sales Report' application window. It has a menu bar with 'File', 'Export', 'Password', and 'Buy Ngw'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Quick Export', 'Set Password', and 'Re-generate'. The main area is titled 'Criteria' and contains the following fields:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to 'Invoice'.
- Folder:** A list box showing a tree structure with folders: 'Document', 'Quotation', 'Delivery Note', '2022', and '--- Quotation'. The 'Document' folder is selected.
- Currency:** A dropdown menu currently set to 'Hong Kong Dollar, \$'.
- Date Range:** Radio buttons for 'Custom', 'Current Month', 'Previous Month', 'Today', and 'Yesterday'. The 'Custom' option is selected.
- Date Selection:** Two date pickers with calendar icons, showing the month of December (12).
- Search:** Three rows, each with a dropdown menu and a text input field, all labeled 'contains'.
- Status:** A dropdown menu currently set to '-- All Status --'.
- Last Generated:** A text field showing '--'.

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

Below is the sample output of Global Sales Report.

<b>Global Sales Report - Last Month Sales</b> (Generated on 2018-01-02 15:32:20)	
<u>Criteria</u>	
Document Type	: Invoice
Folder	:
Currency	: United States Dollar, \$
Date	: 2017-12-01 to 2017-12-31
Status	: All Status
<hr/>	
<u>Result</u>	
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 by month.

Monthly Sales Report

FileExportPasswordBuy Ngw

Save

Preview

Print

Quick Export

Set Password

Re-generate

Criteria

This report will group the Invoices, for a specified year, by month.

Report Name

Document Type

Invoice

Folder

Document

Quotation

Delivery Note

2022

--- Quotation

Currency

Hong Kong Dollar, \$

Year

2023

Search [?]

contains

contains

contains

Status

-- All Status --

Last Generated

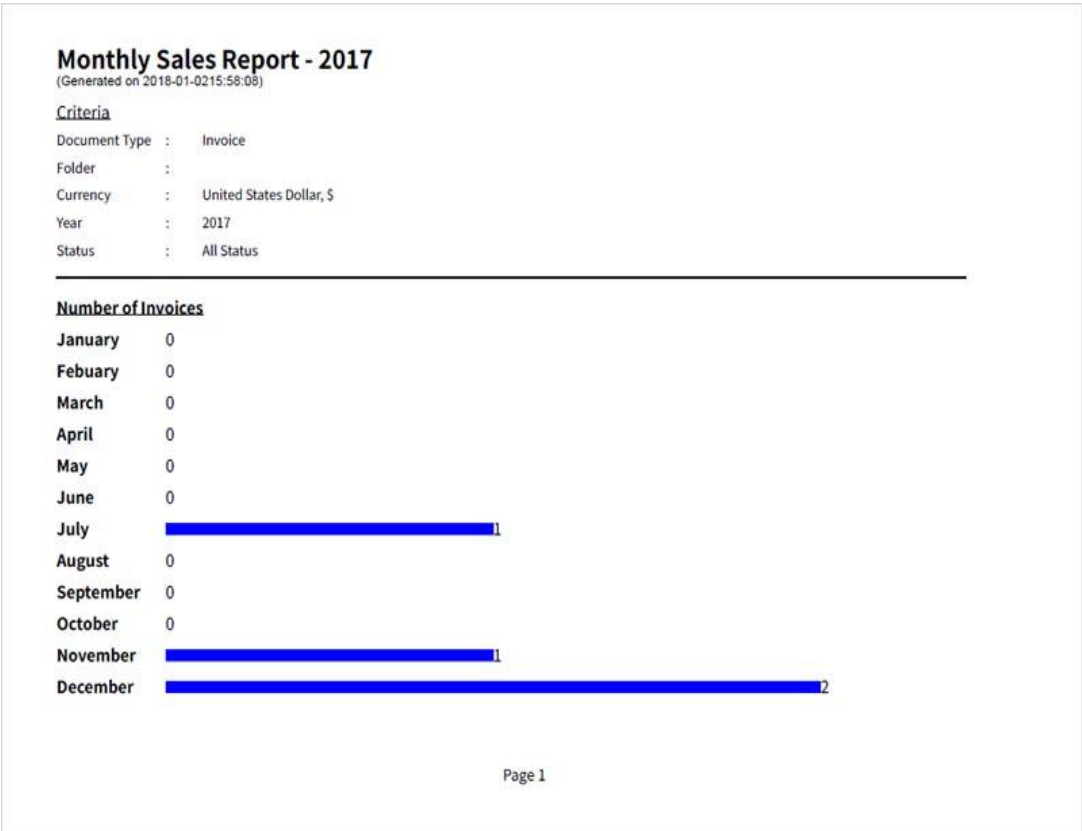
--

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices in selected year.

Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

Below is the sample output of Monthly Sales Report.





### 8.3. Sales Report by Customer

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

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

The user has the following options to select the customer:

- All Customers
- Customers not listed in the Customer List
- Customer selected from the Customer List

Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

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

Customer Sales Report - 2017 DEC

(Generated on 2018-01-02 16:18:45)

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 an overview of payment activities. It aggregates data from Receipt and provides: Number of receipts issued and Amount Received.

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter receipts that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, the user can click the "Re-generate" button to rerun the analysis.

The sample output of Global Payment Report is shown below.

<b>Global Payment Report - Last Month Receipt</b> (Generated on: 2018-01-02 15:30:32)	
<u>Criteria</u>	
Folder	: Document
Currency	: United States Dollar, \$
Date	: 2017-12-01 to 2017-12-31
Status	: All Status
<hr/>	
<u>Result</u>	
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 received.

Monthly Payment Report

FileExportPasswordBuy Now

Save

Preview

Print

Quick Export

Set Password

Re-generate

Criteria

This report will group the Receipts, for a specified year, by month.

Report Name

Folder

Document

Quotation

Delivery Note

2022

--- Quotation

Currency

Hong Kong Dollar, \$

Year

2023

Search

contains

contains

contains

Status

-- All Status --

Last Generated

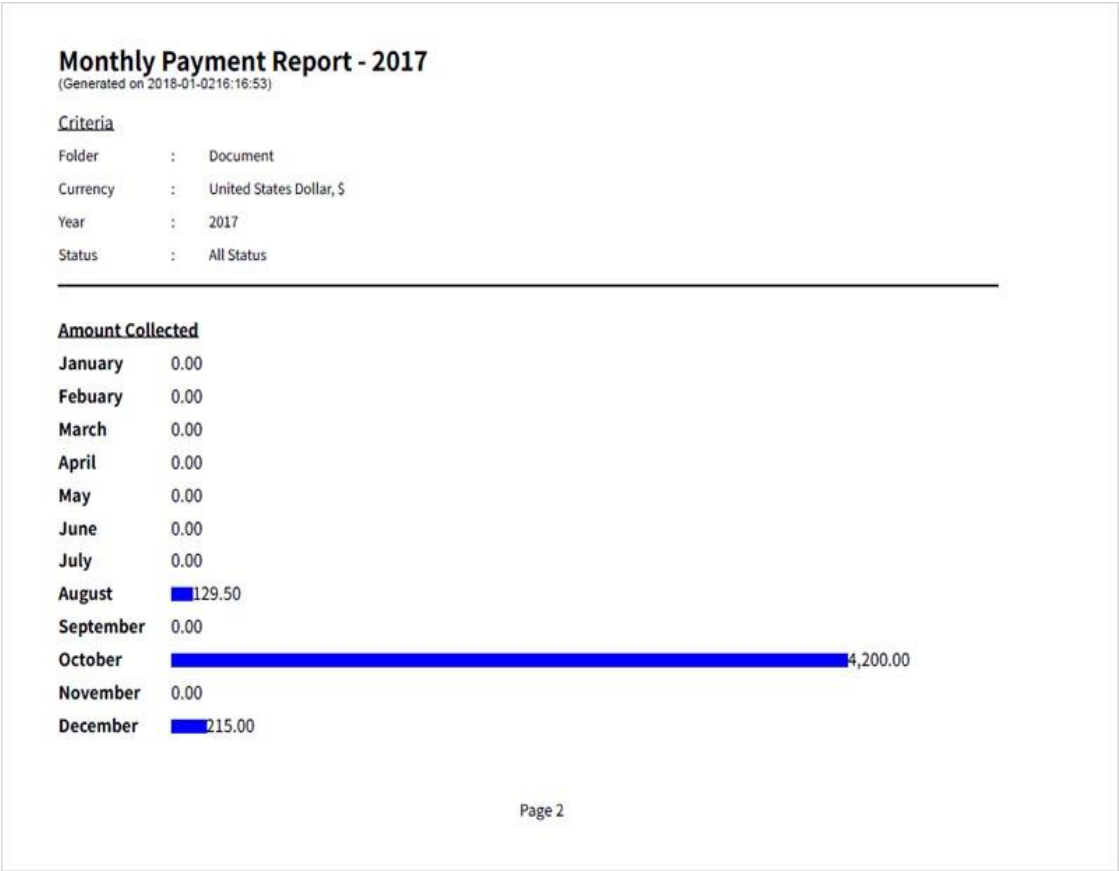
--

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts in selected year.

Search fields are available to filter receipts that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

The sample output of Monthly Payment Report is shown below.



## 8.6. Payment Report by Customer

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

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

The user has the following options to select the customer:

- All Customers
- Customers not listed in the Customer List
- Customer selected from the Customer List

Search fields are available to filter receipts that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

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

# Customer Payment Report - 2017 Dec

(Generated on 2018-01-02 16:19:20)

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 generates monthly statements for selected customers using invoice or tax invoice data.

The screenshot shows a web application window titled "Monthly Statement". The interface includes a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main area is titled "Criteria" and contains the following fields:


- Report Name:** A text input field.
- Document Type:** A dropdown menu set to "Invoice".
- Folder:** A list of folders with checkboxes: "Document", "Quotation", "Delivery Note", "2022", and "Quotation".
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Customer:** Radio buttons for "Full List" (selected) and an empty text field, with a "Load from Customer List" button.
- Month:** Radio buttons for "Current Month" (selected) and "Previous Month", followed by year and month dropdowns (2023, 11). Below this are "From" and "to" date range selectors (2000, 1 to 2000, 1) and a "Consolidated" checkbox.
- Search [?]:** Three rows of dropdown menus followed by "contains" text and input fields.
- Count against:** Radio buttons for "Document Date" (selected) and "Shipping Date".
- Show:** Checkboxes for "Order No.", "Payment Term", "Status", "Deposit", "Balance", "Payment Received", and "Outstanding Balance".
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A text field showing "--".

User must provide a name for the report for easy retrieval later.

The report allows the generation of monthly statements for either the full customer list or an individual customer. The statement can be produced for a specific month or within a chosen time range. The date used for calculations can be the document date or shipping date. Optional fields can also be selected for inclusion in the monthly statement.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

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	10061	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

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## 8.8. Payment Received Report

Payment Received Report lists the payment received record made in Invoice or Tax Invoice.

The screenshot shows a web application window titled "Payment Received Report Payment received". The interface includes a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Set Password", and "Re-generate". The main section is titled "Criteria" and contains the following fields:

- Report Name:** A text input field containing "Payment received".
- Document Type:** A dropdown menu set to "Invoice".
- Folder:** A list of checkboxes with corresponding icons:
  - ☒ Document
  - ☐ Quotation
  - ☐ Delivery Note
  - ☐ 2022
  - ☐ --- Quotation
- Currency:** A dropdown menu set to "United States Dollar, \$".
- Customer:** Radio buttons for "Full List" (selected) and an empty field, with a "Load from Customer List" button.
- Month:** Radio buttons for "Current Month", "Previous Month", and a dropdown set to "2023" with a "5" in a small box.
- Search [?]:** Three rows of dropdown menus followed by "contains" text and input fields.
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A timestamp "2023-11-09 01:12:30".

User must provide a name for the report for easy retrieval later.

The report allows the generation of monthly statements for either the full customer list or an individual customer in a specific month.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

Sample output of Payment Received Report is shown below.



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info@evinco-software.com  
Website : <https://www.evinco-software.com>

---

**Payment Records**

Customer

DODD's Shop

Number INV10009

Date	Payment Method	Reference Number	Description	Amount Received
2023-05-13	Cheque			6,400.00

Invoice Total	6,400.00
Deposit	--
Balance	--
Total Payment Received	6,400.00
Outstanding Balance	0.00

## 8.9. 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.

The screenshot shows a web application window titled "Customer Purchase History". At the top, there is a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main area is titled "Criteria" and contains the following fields and controls:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Invoice".
- Folder:** A list box showing "Document", "Quotation", and "Delivery Note" with checkboxes.
- Currency:** A dropdown menu currently set to "Hong Kong Dollar, \$".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below are date pickers for start and end dates.
- Customer:** A text input field and a "Load from Customer List" button.
- Item Name:** A large text input field.
- Buttons:** "Load from Item List" and "Remove Selected" buttons are located below the Item Name field.
- Status:** A dropdown menu currently set to "-- All Status --".
- Last Generated:** A text field showing "--".

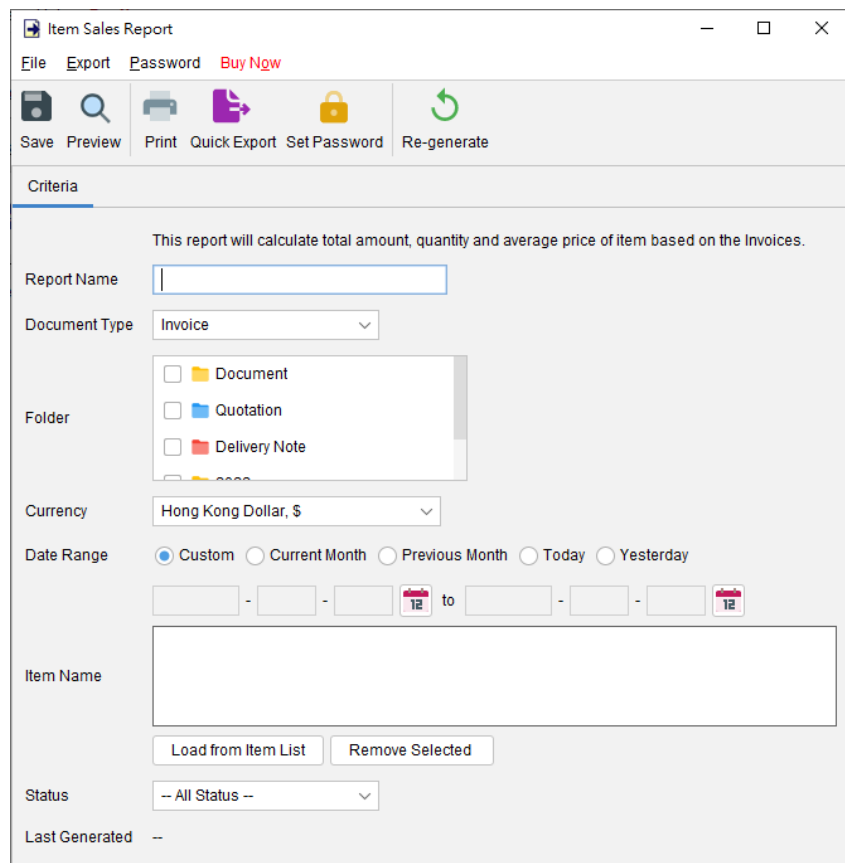
User must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range for a customer with selected items.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

## 8.10. Item Sales Report

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



The screenshot shows the 'Item Sales Report' window with the 'Criteria' tab selected. The window has a title bar with standard OS controls and a menu bar with 'File', 'Export', 'Password', and 'Buy Now'. Below the menu bar is a toolbar with icons for 'Save', 'Preview', 'Print', 'Quick Export', 'Set Password', and 'Re-generate'. The main area is titled 'Criteria' and contains the following fields and controls:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to 'Invoice'.
- Folder:** A list box showing 'Document', 'Quotation', and 'Delivery Note' with checkboxes.
- Currency:** A dropdown menu currently set to 'Hong Kong Dollar, \$'.
- Date Range:** Radio buttons for 'Custom', 'Current Month', 'Previous Month', 'Today', and 'Yesterday'. Below these are date pickers for start and end dates.
- Item Name:** A large text input field.
- Buttons:** 'Load from Item List' and 'Remove Selected' buttons are located below the Item Name field.
- Status:** A dropdown menu currently set to '-- All Status --'.
- Last Generated:** A text field showing '--'.

User must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range for selected items.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

## 8.11. Sales Person Report

Sales Person Report calculates total amount of invoices of selected sales person from Invoices or Tax Invoices.

The screenshot shows a window titled "Sales Person Report" with a menu bar (File, Export, Password, Buy Ngw) and a toolbar (Save, Preview, Print, Quick Export, Set Password, Re-generate). The main area is labeled "Criteria" and contains the following fields:

- Report Name:** A text input field.
- Document Type:** A dropdown menu with "Invoice" selected.
- Folder:** A list box with checkboxes for "Document", "Quotation", "Delivery Note", "2022", and "Quotation".
- Currency:** A dropdown menu with "Hong Kong Dollar, \$" selected.
- Sales Person:** A dropdown menu.
- Month:** Radio buttons for "Current Month" (selected), "Previous Month", and "2023". There are also dropdowns for "11" and "1".
- Search [?]:** Three rows of dropdown menus followed by "contains" text and input fields.
- Show:** Checkboxes for "Status", "Payment Received", and "Outstanding Balance".
- Status:** A dropdown menu with "-- All Status --" selected.
- Last Generated:** A text field showing "--".

User must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range. Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, the user can click the "Re-generate" button to rerun the analysis.

## 8.12. Total Tax Payable Report

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

The screenshot shows a web application window titled "Total Tax Payable Report". The window has a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main content area is titled "Criteria" and contains the following fields:

- Report Name:** A text input field.
- Document Type:** A dropdown menu with "Quotation" selected.
- Folder:** A list of checkboxes with corresponding folder icons:
  - ☐ Document
  - ☐ Quotation
  - ☐ Delivery Note
  - ☐ 2022
  - ☐ --- Quotation
- Currency:** A dropdown menu with "Hong Kong Dollar, \$" selected.
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". The "Custom" option is selected.
- Search:** Three rows of search criteria, each with a dropdown menu and a text input field. The first row has "contains" selected.
- Status:** A dropdown menu with "-- All Status --" selected.
- Last Generated:** A text field showing "--".

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all selected document dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter documents that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, the user can click the "Re-generate" button to rerun the analysis.



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

<b>Total Tax Payable Report - Tax Payable</b> <small>(Generated on: 2018-01-03 00:22:44)</small>	
<b>Criteria</b>	
Document	: Invoice
Folder	: Document
Currency	: United States Dollar, \$
Date	: 2017-12-01 to 2017-12-31
Status	: All Status
<hr/>	
<b>Result</b>	
Number of Documents	: 4
Total Tax	: 519.54

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## 8.13. Supplier Report

Supplier report shows the number of purchase order and total amount of the selected suppliers.

The screenshot shows the 'Supplier Report' window with the following elements:

- Menu Bar:** File, Export, Password, Buy Now.
- Toolbar:** Save, Preview, Print, Quick Export, Set Password, Re-generate.
- Criteria Section:**
  - Report Name:** A text input field.
  - Folder:** A list box with options: Document, Quotation, Delivery Note.
  - Currency:** A dropdown menu set to 'Hong Kong Dollar, \$'.
  - Date Range:** Radio buttons for Custom, Current Month, Previous Month, Today, and Yesterday. Below are date pickers for start and end dates.
  - Supplier:** Radio buttons for 'All Suppliers in Supplier List' (selected), 'Not listed in Supplier List', and 'Pick from Supplier List'. Below is a large text area for manual entry.
  - Buttons:** 'Load from Supplier List' and 'Remove Selected'.
  - Search:** Three rows of dropdown menus followed by 'contains' and text input fields.
  - Status:** A dropdown menu set to '-- All Status --'.
  - Last Generated:** A label with a '--' value.

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

The user has the following options to select the supplier:

- All Suppliers
- Suppliers not listed in the Supplier List
- Supplier selected from the Supplier List

Search fields are available to filter purchase orders that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, the user can click the "Re-generate" button to rerun the analysis.

The sample output of Supplier Report is shown below.

<b>Supplier Report - 2018</b> (Generated on 2018-01-03 00:27:17)		
<u>Criteria</u>		
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

## 8.14. Monthly Statement for Supplier


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

User may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all purchase orders dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter purchase orders that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, the user can click the "Re-generate" button to rerun the analysis.

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



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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

## 8.15. Raw Data Export

Raw Data Export allows user to get details information of the document created in EasyBilling. This report can only be exported into Excel format.

The screenshot shows the 'Raw Data Export' window with the following sections:

- Criteria**
  - Report Name:
  - Document Type:
  - Folder:
    - ☐ Document
    - ☐ Quotation
    - ☐ Delivery Note
  - Date Range:
    - ☒ Custom
    - ☐ Current Month
    - ☐ Previous Month
    - ☐ Today
    - ☐ Yesterday
  - Search: Three rows of  contains
  - Status:
- Show Columns**
  - ☐ Quote No.
  - ☐ VAT No
  - ☐ Shipping Date
  - ☐ Custom Field 4
  - ☐ Unit Price
  - ☐ Total
  - ☐ Notes
  - ☐ Date
  - ☐ Ship To
  - ☐ Shipping Term
  - ☐ Custom Field 5
  - ☐ Qty
  - ☐ Tax
  - ☐ Status
  - ☐ Currency
  - ☐ Ship To Address
  - ☐ Payment Term
  - ☐ Custom Field 6
  - ☐ Total
  - ☐ Tax 2
  - ☐ Comment
  - ☐ Quote To
  - ☐ VAT No
  - ☐ Custom Field 1
  - ☐ ID
  - ☐ Sub-Total
  - ☐ Total
  - ☐ Quote To Address
  - ☐ Sales Rep.
  - ☐ Custom Field 2
  - ☐ Description
  - ☐ Discount
  - ☐ Custom Field II 1
  - ☐ Tel
  - ☐ Customer Ref. No.
  - ☐ Custom Field 3
  - ☐ Unit
  - ☐ Shipping
  - ☐ Custom Field II 2

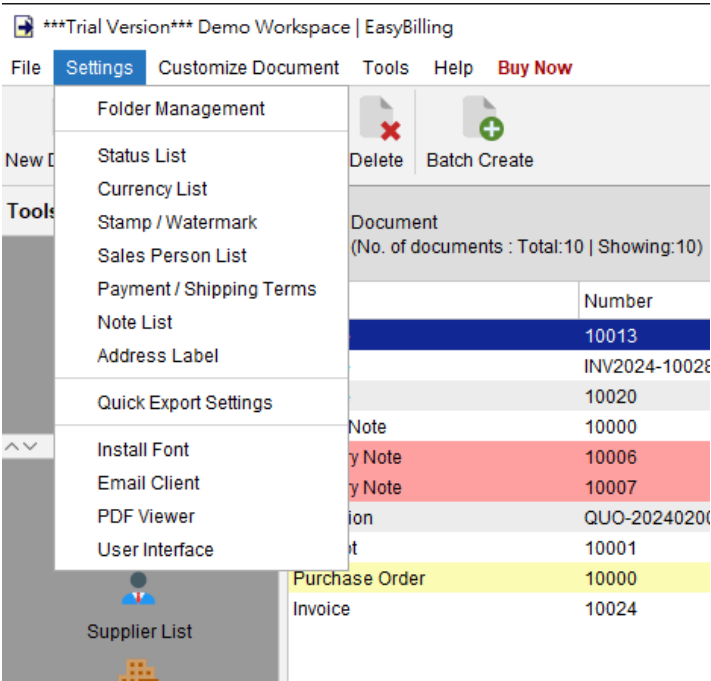
Buttons:

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 (in bold and italic) is selected, the document will be spanned as multiple rows according to the number of line items.

## 9. SETTINGS

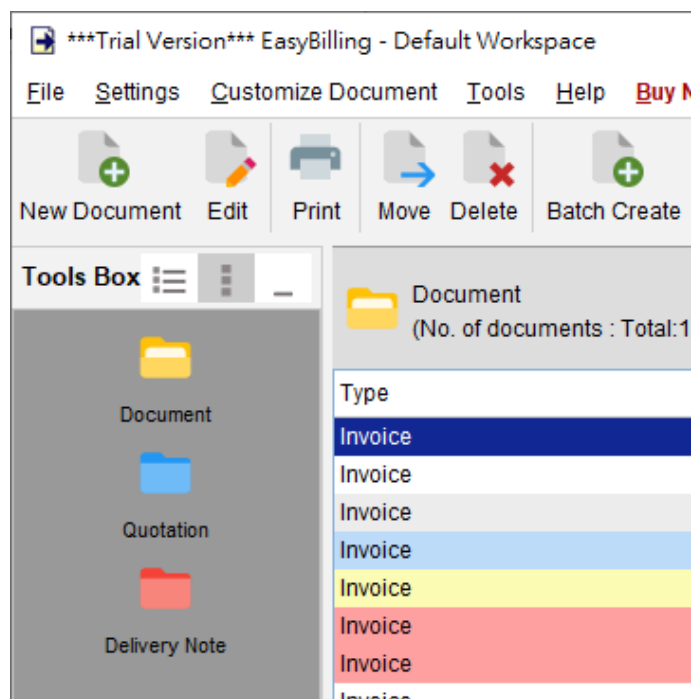


User can configure EasyBilling by adjust different settings easily.

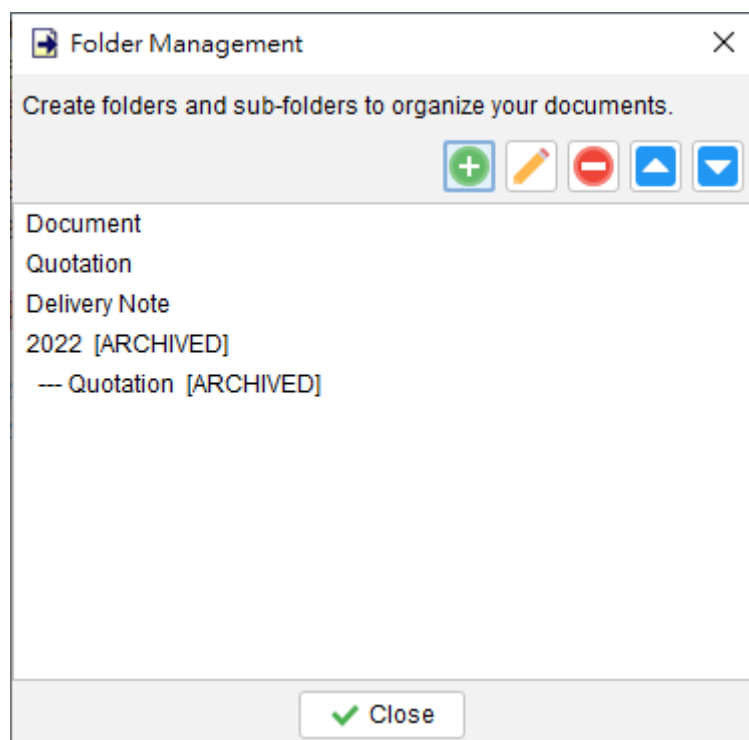
- Folder Management
- Document Status List
- Currency List
- Stamp / Watermark
- Sales Person List
- Payment / Shipping Terms
- Notes List
- Address Label
- Quick Export Settings
- Install Font
- Email Client
- PDF Viewer
- User Interface

## 9.1. Folder Management

In EasyBilling, a default folder named "Document" is available. You may create additional folders in menu "Settings > Folder Management" to organizing the documents.

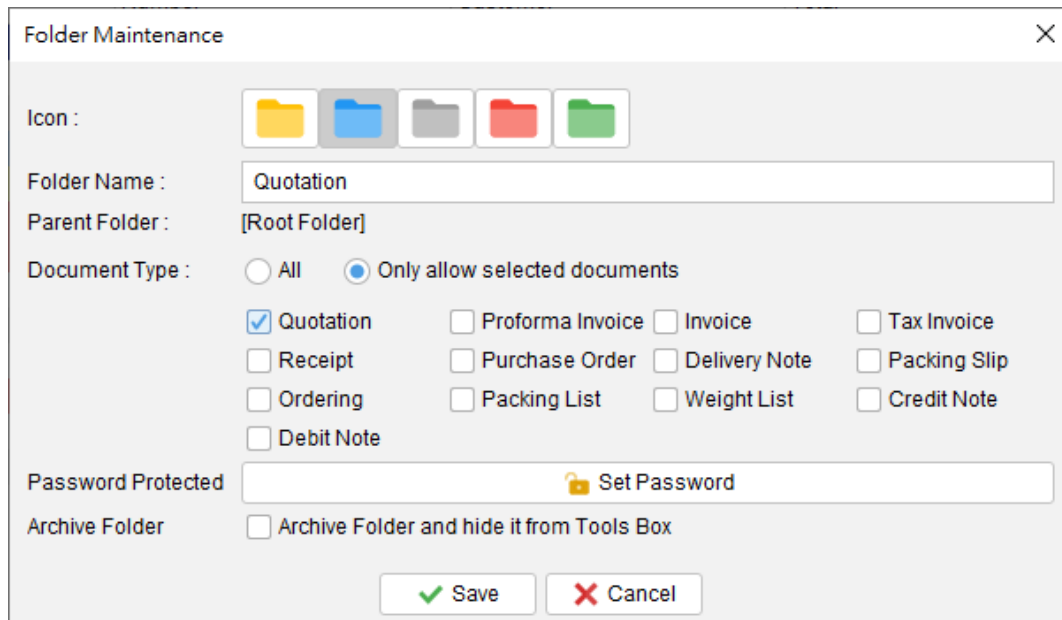


To manage the folder list, you can click on the icon to add, edit, or remove folders. You can also use the arrow buttons to adjust the folder's position by moving it up or down to reorder.





Furthermore, EasyBilling allows to assign different color icons to folders. You can create one level of sub-folders under a parent folder for further organization. Additionally, you have the option to restrict certain types of documents from being stored in the folder.

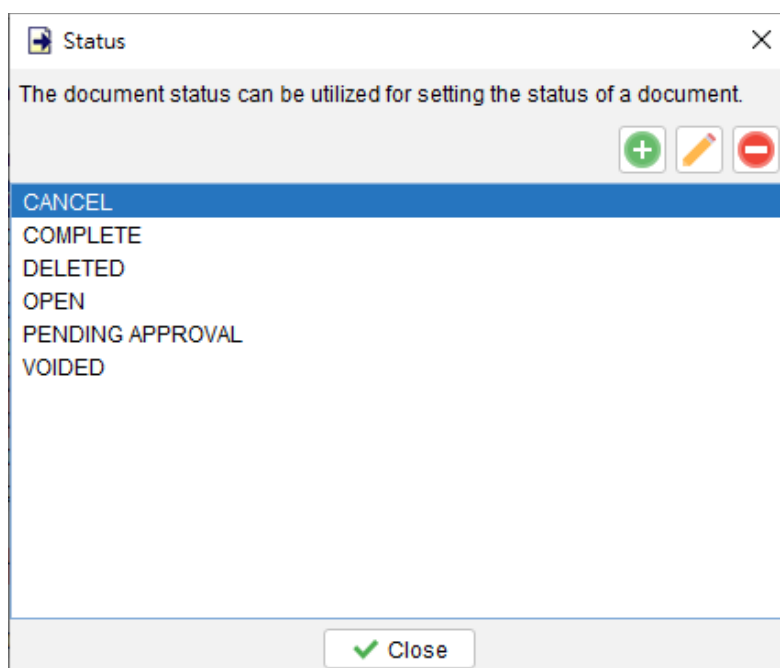


The 'Folder Maintenance' dialog box is used for configuring folder settings. It includes a title bar with a close button. The 'Icon' section shows five folder icons: yellow, blue, grey, red, and green. The 'Folder Name' field contains 'Quotation'. The 'Parent Folder' is set to '[Root Folder]'. The 'Document Type' section has two radio buttons: 'All' and 'Only allow selected documents' (which is selected). Below this are checkboxes for various document types: Quotation (checked), Receipt, Ordering, Debit Note, Proforma Invoice, Purchase Order, Packing List, Invoice, Delivery Note, Weight List, Tax Invoice, Packing Slip, and Credit Note. The 'Password Protected' section has a text field and a 'Set Password' button. The 'Archive Folder' section has a checkbox for 'Archive Folder and hide it from Tools Box'. At the bottom are 'Save' and 'Cancel' buttons.

Folder can also be set with a password to protect from access. If the folder is no longer be used, you may archive the folder and hide it from the Tools Box. These two options are only available in editing folder.

## 9.2. Document Status List

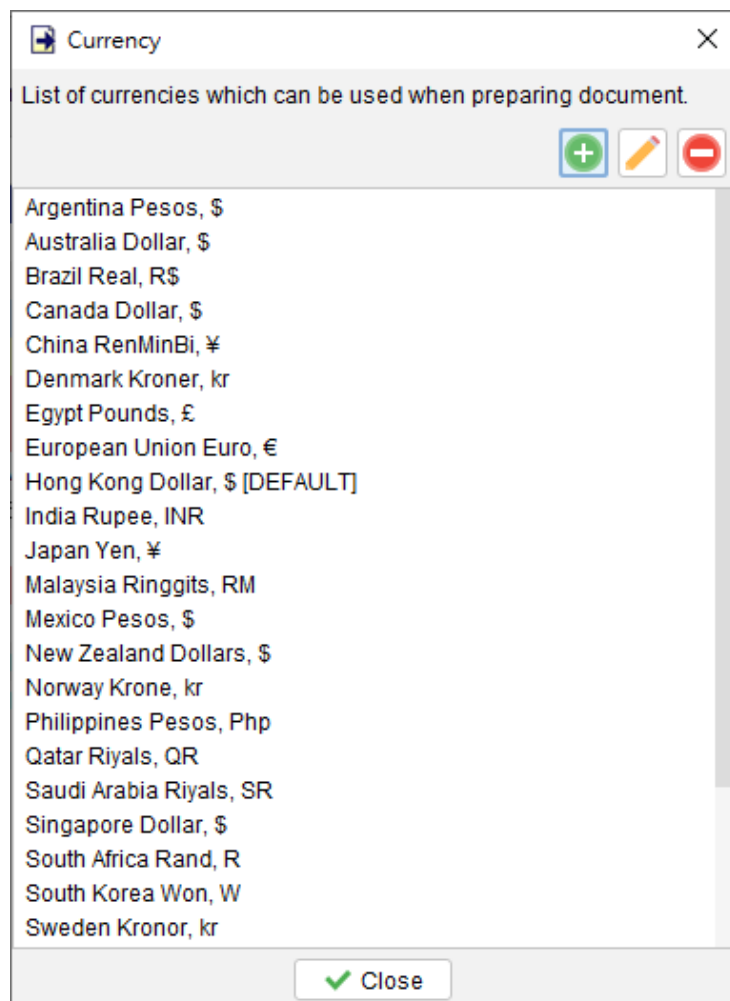
The document status can be utilized for setting the status of a document. You can click the button to add, edit, or delete a status entry.



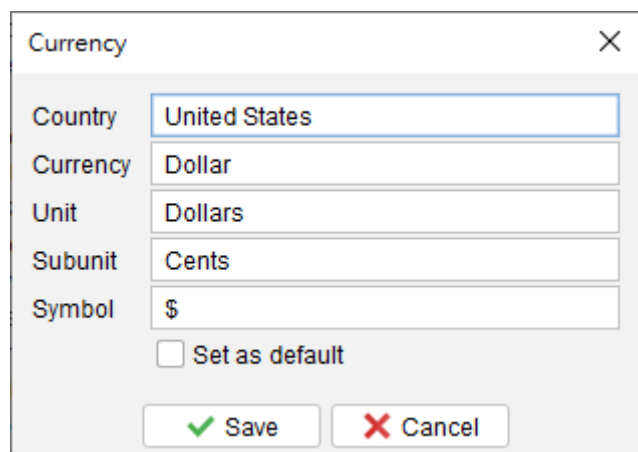
The 'Status' dialog box is used for managing document status entries. It has a title bar with a close button. The main text says 'The document status can be utilized for setting the status of a document.' Below this are three buttons: a green plus sign (add), a yellow pencil (edit), and a red minus sign (delete). A list of status entries is shown: CANCEL, COMPLETE, DELETED, OPEN, PENDING APPROVAL, and VOIDED. At the bottom is a 'Close' button.

### 9.3. Currency List

In EasyBilling, it is allowed to assign a currency to a document. Users can manage the Currency List in menu "Settings > Currency List".

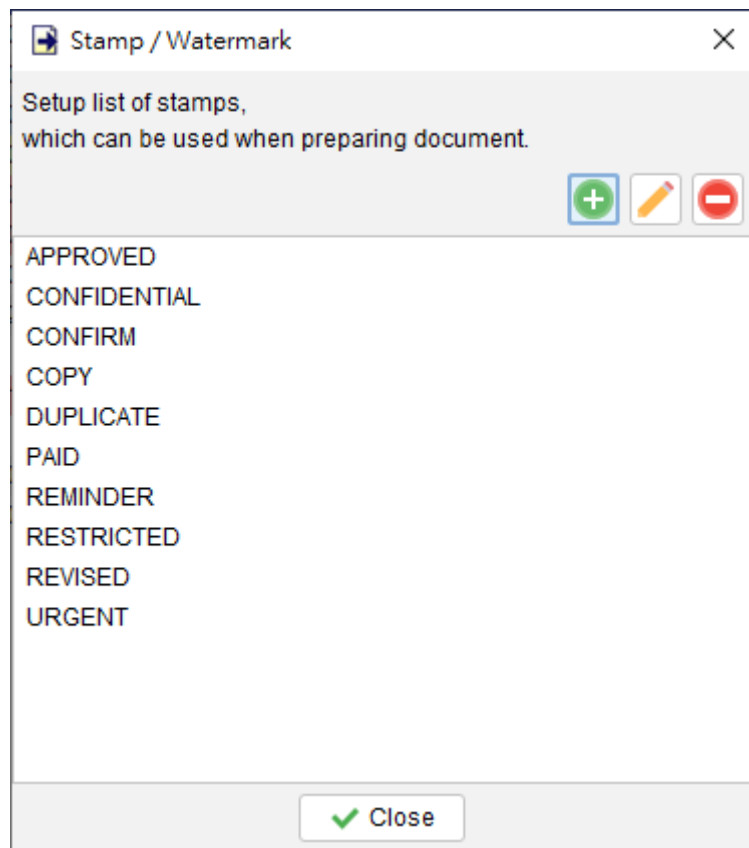


For each currency, you can specify the Unit, Subunit, and Symbol. Additionally, you have the option to designate a default currency.

A screenshot of a software window titled "Currency" with a close button (X) in the top right corner. The window contains five input fields: "Country" with "United States", "Currency" with "Dollar", "Unit" with "Dollars", "Subunit" with "Cents", and "Symbol" with "\$". Below these fields is a checkbox labeled "Set as default" which is currently unchecked. At the bottom of the window are two buttons: a green checkmark button labeled "Save" and a red X button labeled "Cancel".

## 9.4. Stamp / Watermark

In EasyBilling, document can be added with a red stamp to indicate the important mark. You may also add a greyscale watermark on the document too. You can maintain the list in menu “Settings > Stamp / Watermark”.

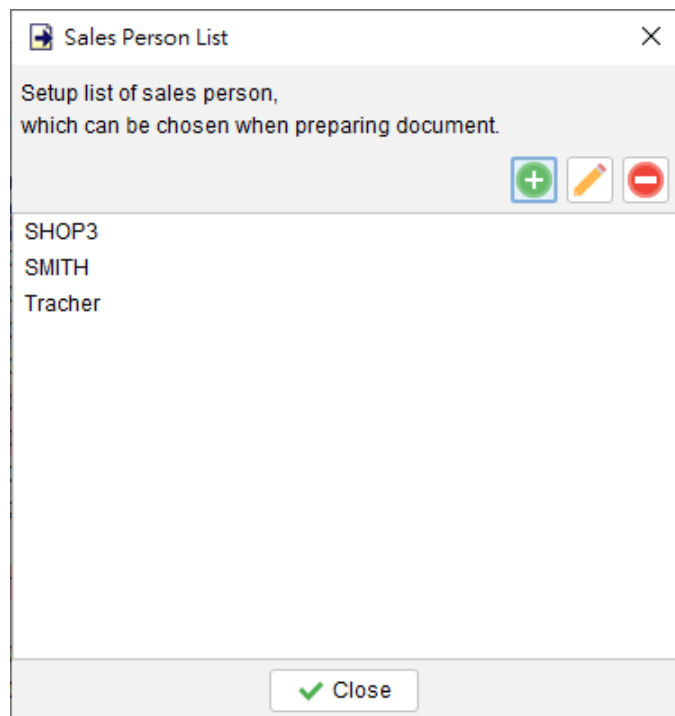


To maintain the list, click the icon at the top-right corner to add, edit and delete. By default, it has

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

## 9.5. Sales Person List

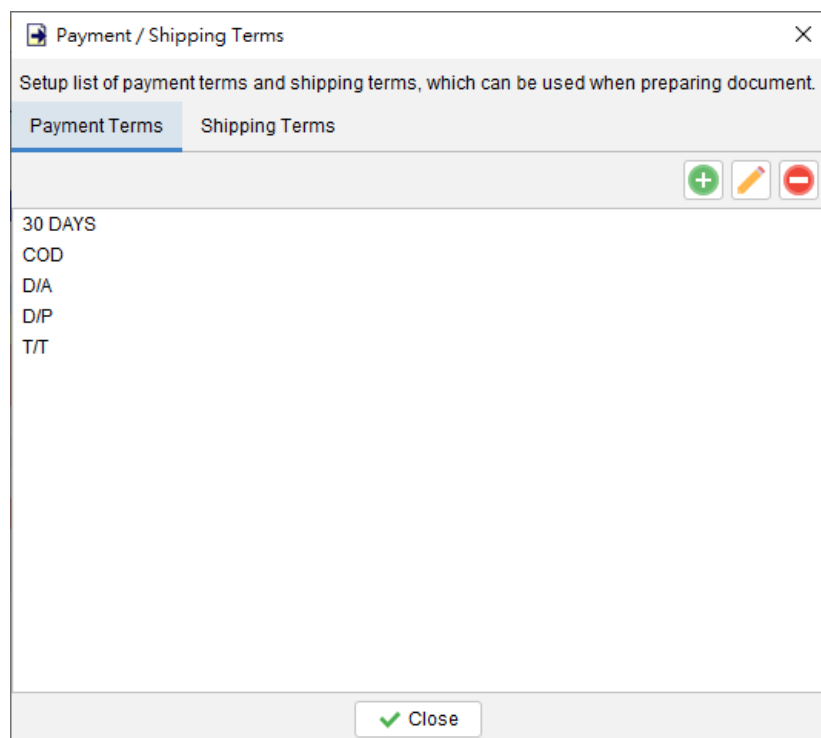
You can maintain your own Sales Person list, which can be selected when preparing document.



## 9.6. Payment / Shipping Terms

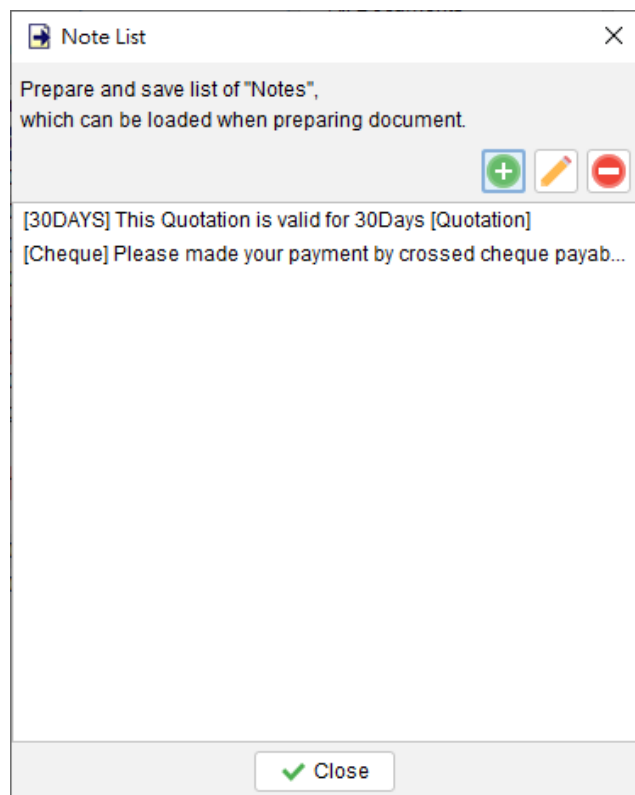
Payment Terms and Shipping Terms are listed here. Click icon at the top-right corner to add, edit or delete.

When preparing document, you can select the terms from the list.



## 9.7. Note List

When preparing document, user can load the notes directly from this Note List. You can maintain your notes here. Click the icon at the top-right corner to add, edit and delete.



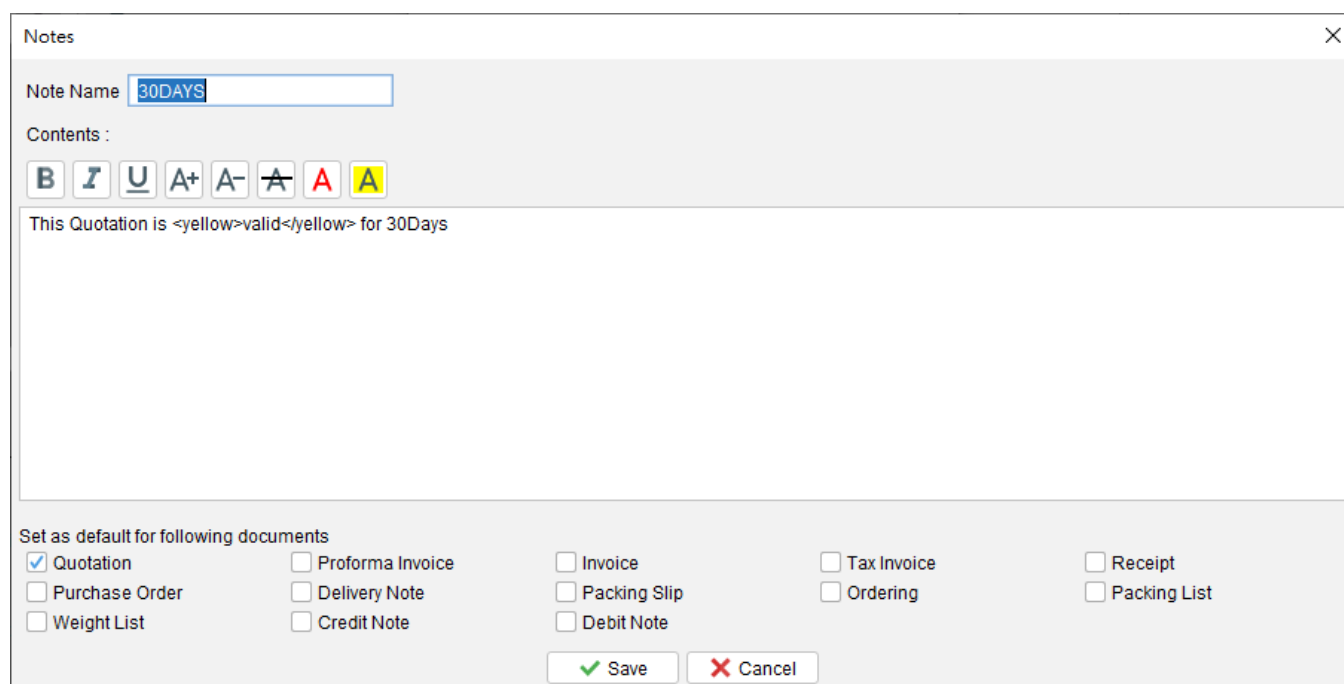
Note List

Prepare and save list of "Notes",  
which can be loaded when preparing document.

[30DAYS] This Quotation is valid for 30Days [Quotation]  
[Cheque] Please made your payment by crossed cheque payab...

Close

The format of note will be preserved as what you typed in. The note can be set as default for documents.



Notes

Note Name

Contents :

**B** *I* U **A+** **A-** **A** **A** **A**

This Quotation is <yellow>valid</yellow> for 30Days

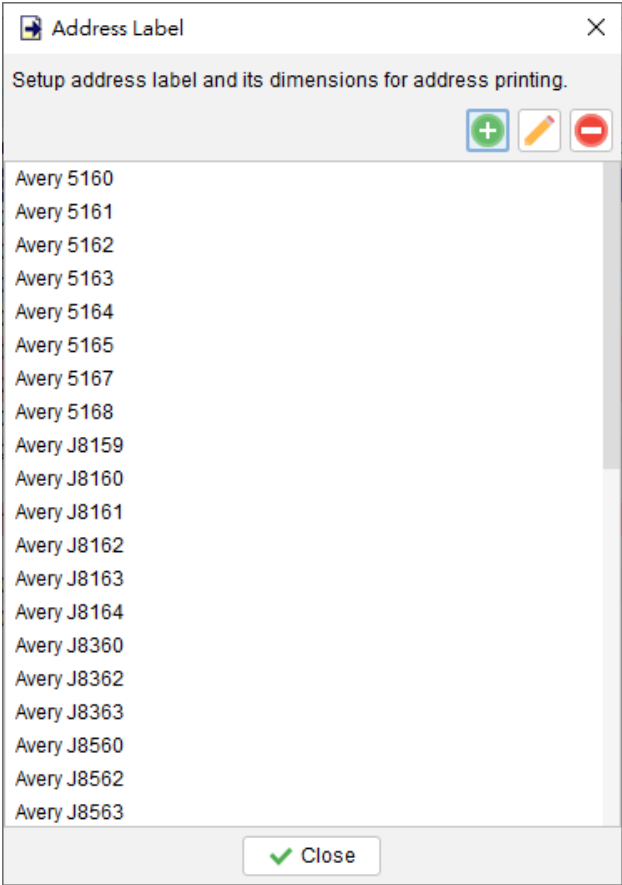
Set as default for following documents

<input checked="" type="checkbox"/> Quotation	<input type="checkbox"/> Proforma Invoice	<input type="checkbox"/> Invoice	<input type="checkbox"/> Tax Invoice	<input type="checkbox"/> Receipt
<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Delivery Note	<input type="checkbox"/> Packing Slip	<input type="checkbox"/> Ordering	<input type="checkbox"/> Packing List
<input type="checkbox"/> Weight List	<input type="checkbox"/> Credit Note	<input type="checkbox"/> Debit Note		

Save Cancel

### 9.8. Address Label

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



Address Label ✕

Name :

☒ Label ☐ Envelope

Paper Size : Width :  x Height :

Margin : Top :  Bottom :

Left :  Right :

Label : Width :  x Height :

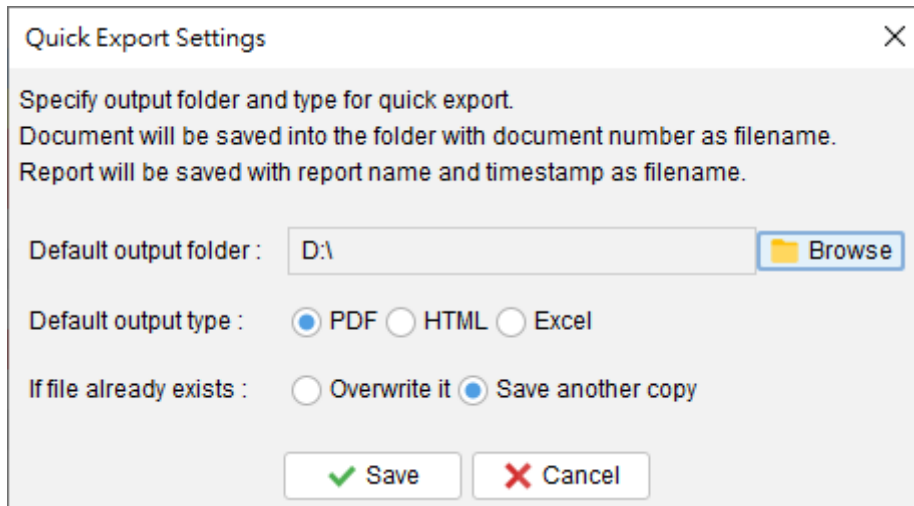
Column :  x Row :

All measurements are in mm.

## 9.9. Quick Export Settings

Within the document or report windows, you will find a [Quick Export] button. By clicking on this button, you can effortlessly export the document or report to a designated folder location.

You have the ability to specify the folder location and export type for quick exports. Additionally, you can choose whether to overwrite existing files or save a separate copy if a file with the same name already exists.



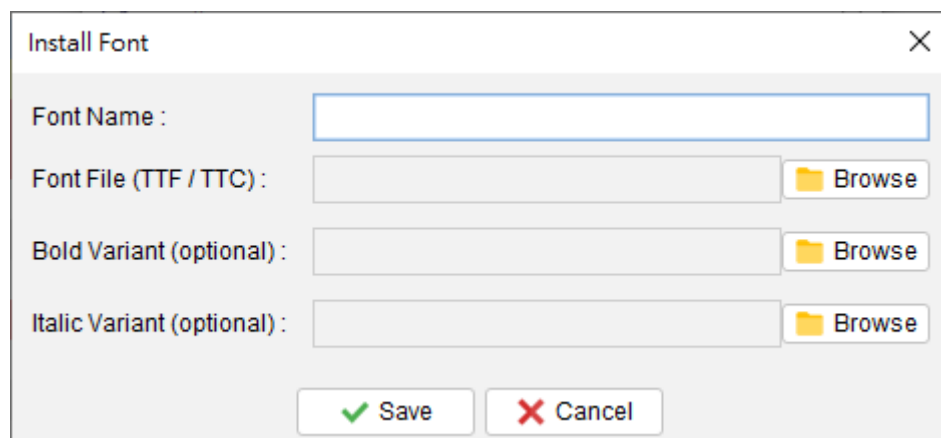
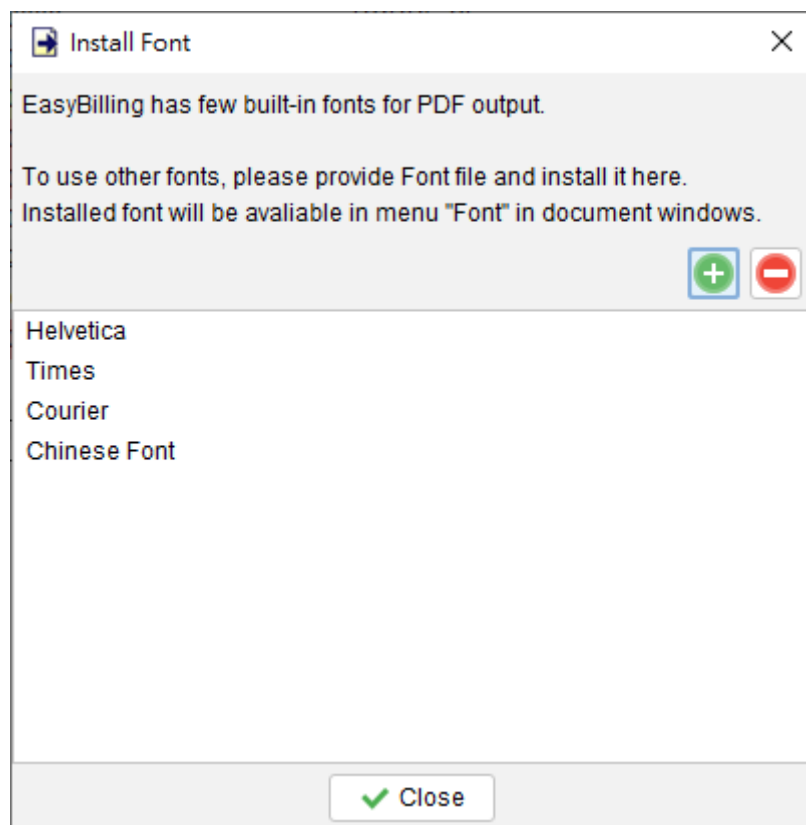
The image shows a 'Quick Export Settings' dialog box with a close button (X) in the top right corner. The dialog contains the following elements:

- Instructions:** 'Specify output folder and type for quick export. Document will be saved into the folder with document number as filename. Report will be saved with report name and timestamp as filename.'
- Default output folder:** A text input field containing 'D:\' and a 'Browse' button with a folder icon.
- Default output type:** Three radio buttons labeled 'PDF' (selected), 'HTML', and 'Excel'.
- If file already exists:** Two radio buttons labeled 'Overwrite it' and 'Save another copy' (selected).
- Buttons:** 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

## 9.10. Install Font

In addition to the four pre-installed fonts, EasyBilling allows you to install your own fonts. The software supports both TTC (TrueType Collection) and TTF (TrueType Font) formats.

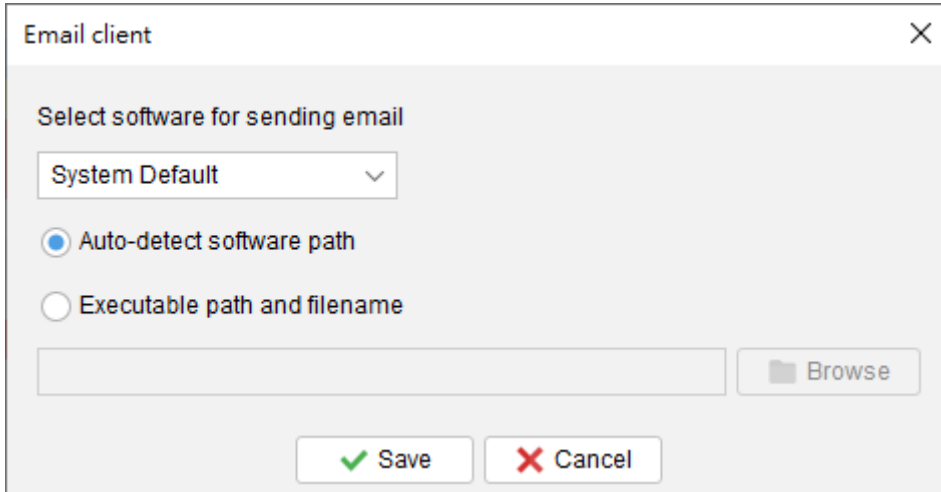
Once you have installed a new font, it will become accessible within EasyBilling. You can easily select and apply the font of your choice from the font options available in the menu bar of the document windows.





## 9.11. Email Client

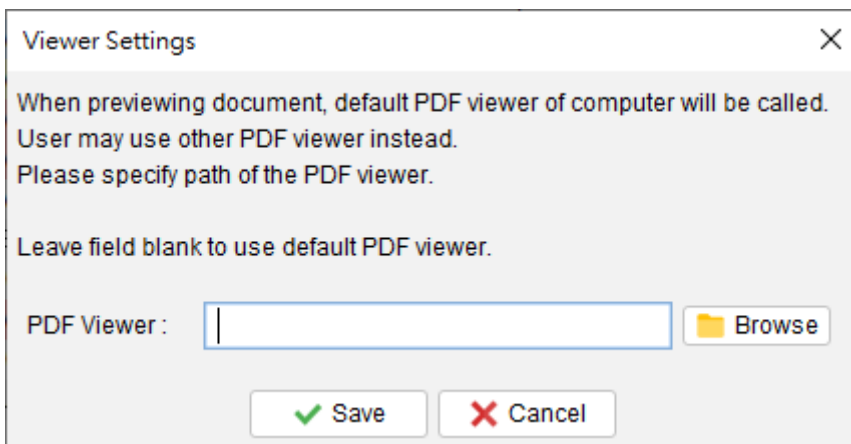
EasyBilling utilizes the system's default email client to send emails. You have the option to specify a preferred email client for sending emails. It's important to note that certain email software may have varying security measures in place, which could restrict the ability to open email composer windows with attachments.



The 'Email client' dialog box has a title bar with a close button (X). The main content area is titled 'Select software for sending email'. It features a dropdown menu currently showing 'System Default'. Below this are two radio buttons: 'Auto-detect software path' (which is selected) and 'Executable path and filename'. Under the second radio button is a text input field and a 'Browse' button with a folder icon. At the bottom are 'Save' (with a green checkmark) and 'Cancel' (with a red X) buttons.

## 9.12. PDF Viewer

When previewing a document in EasyBilling, the software will utilize the system's default PDF viewer. However, you also have the option to specify your preferred PDF viewer program for the preview.

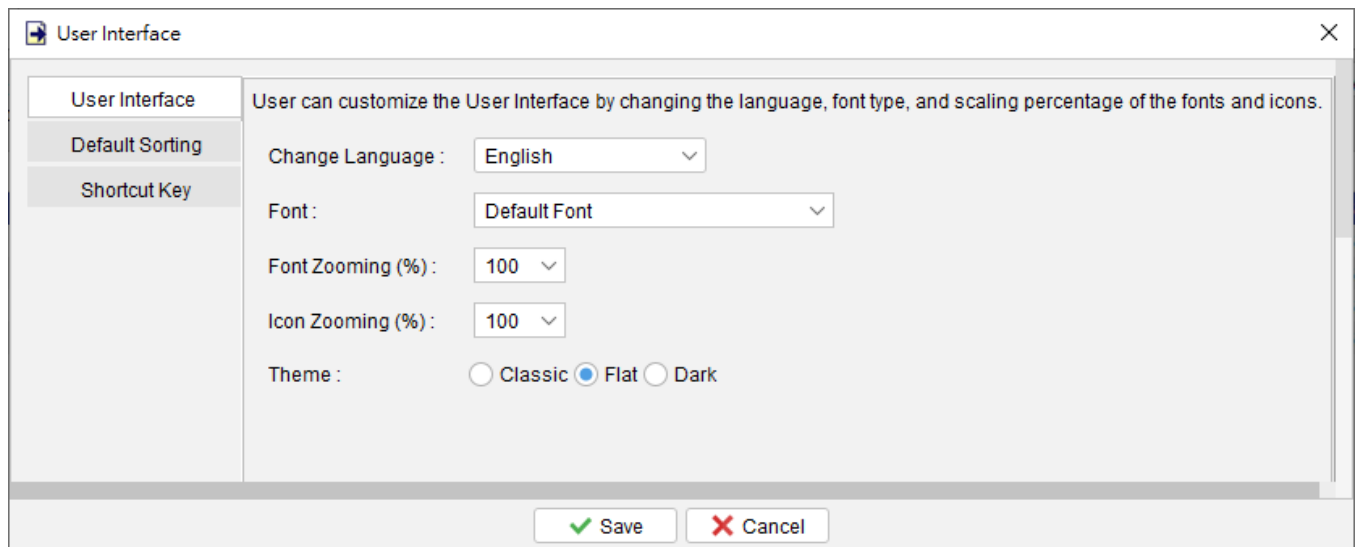


The 'Viewer Settings' dialog box has a title bar with a close button (X). The main content area contains the following text: 'When previewing document, default PDF viewer of computer will be called. User may use other PDF viewer instead. Please specify path of the PDF viewer. Leave field blank to use default PDF viewer.' Below this text is a label 'PDF Viewer :' followed by a text input field and a 'Browse' button with a folder icon. At the bottom are 'Save' (with a green checkmark) and 'Cancel' (with a red X) buttons.

## 9.13. User Interface

EasyBilling offers users the flexibility to customize their user interface by changing the language, font and adjusting the zooming scale for both the font and icons. By default, these settings are set to Auto (100%), but users can increase the scale to make the font and icons larger, such as selecting 125, 150, or 200 as the preferred scale.

Furthermore, EasyBilling provides three types of themes for the user interface: Classic, Flat, and Dark themes. Users can choose the theme that best suits their visual preferences or working environment.

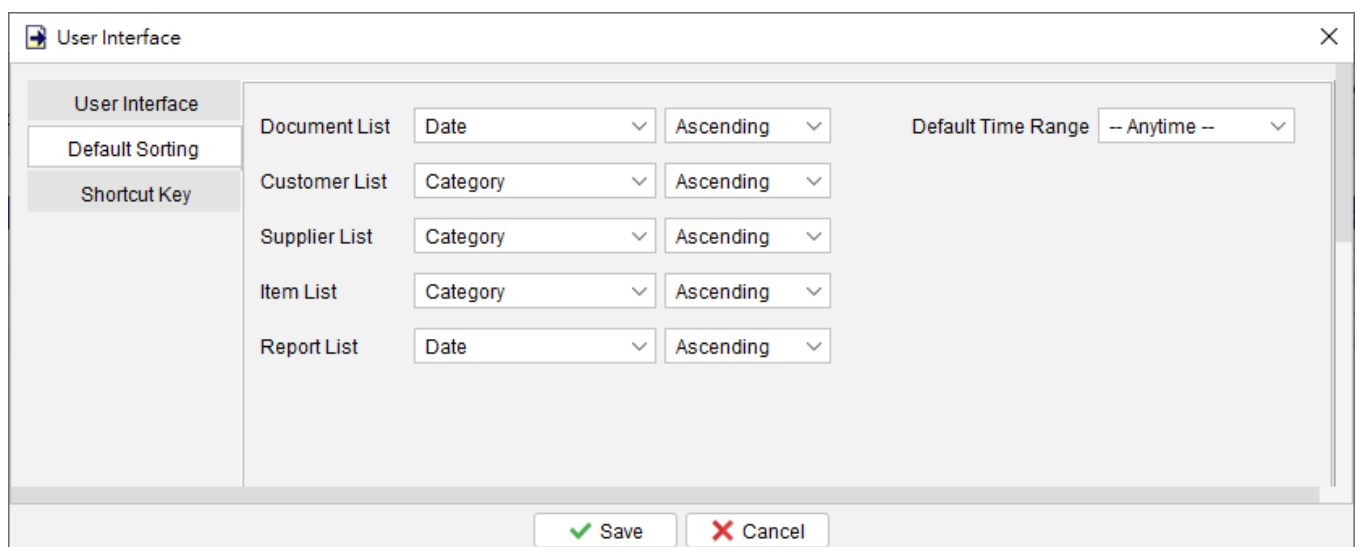


The screenshot shows a dialog box titled "User Interface" with a close button (X) in the top right corner. On the left, there is a sidebar with three tabs: "User Interface" (selected), "Default Sorting", and "Shortcut Key". The main area contains the following settings:

- Change Language : English (dropdown)
- Font : Default Font (dropdown)
- Font Zooming (%) : 100 (dropdown)
- Icon Zooming (%) : 100 (dropdown)
- Theme : ☐ Classic ☒ Flat ☐ Dark

At the bottom, there are two buttons: "Save" (with a green checkmark) and "Cancel" (with a red X).

Additionally, users have the option to set the default sorting column and order for various lists in EasyBilling. This includes the document list, customer list, supplier list, item list, and report. By customizing these settings, users can prioritize and organize their data based on their specific needs and preferences.

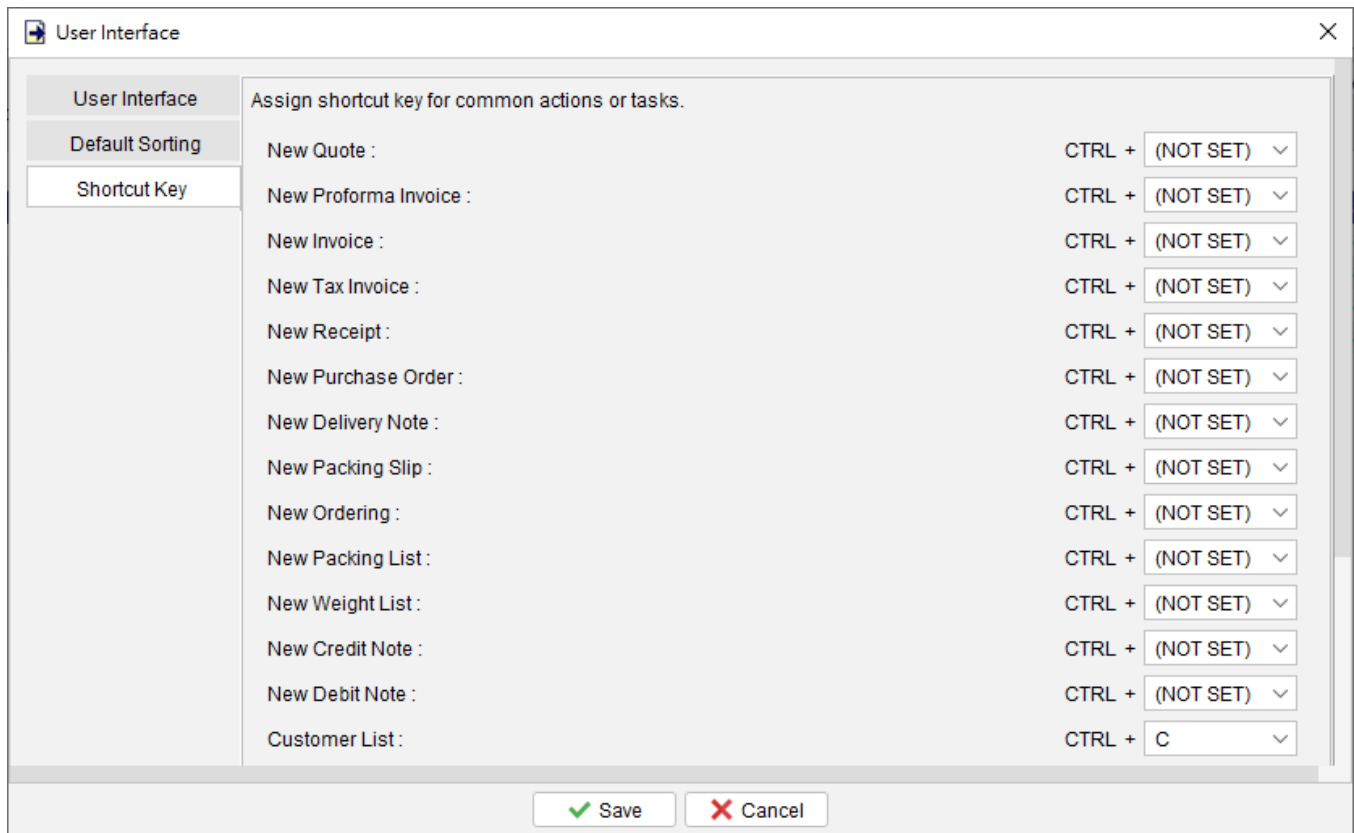


The screenshot shows the same "User Interface" dialog box, but with the "Default Sorting" tab selected in the sidebar. The main area contains the following settings:

- Document List : Date (dropdown), Ascending (dropdown)
- Customer List : Category (dropdown), Ascending (dropdown)
- Supplier List : Category (dropdown), Ascending (dropdown)
- Item List : Category (dropdown), Ascending (dropdown)
- Report List : Date (dropdown), Ascending (dropdown)
- Default Time Range : -- Anytime -- (dropdown)

At the bottom, there are two buttons: "Save" (with a green checkmark) and "Cancel" (with a red X).

Users can personalize their experience by defining custom Shortcut Keys for common tasks. To do this, simply select the desired Character Key that will be associated with the specific task.

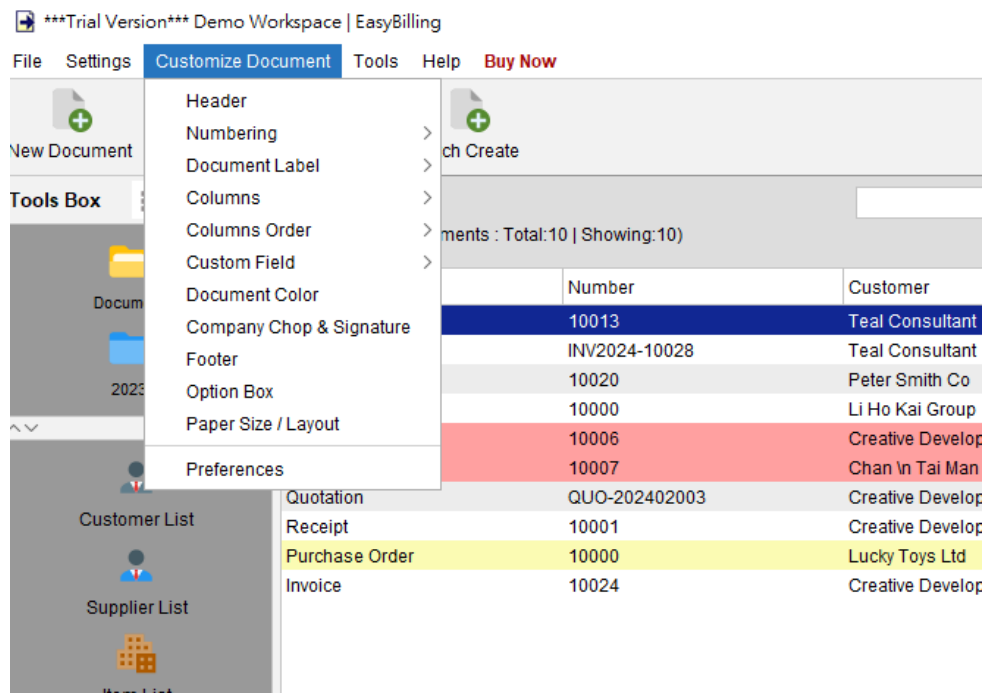


The screenshot shows a window titled "User Interface" with a close button (X) in the top right corner. On the left, there is a sidebar with three tabs: "User Interface", "Default Sorting", and "Shortcut Key". The "Shortcut Key" tab is currently selected. The main area of the window contains the text "Assign shortcut key for common actions or tasks." followed by a list of tasks and their assigned shortcut keys. The tasks and their shortcuts are as follows:

Task	Shortcut Key
New Quote :	CTRL + (NOT SET) ▾
New Proforma Invoice :	CTRL + (NOT SET) ▾
New Invoice :	CTRL + (NOT SET) ▾
New Tax Invoice :	CTRL + (NOT SET) ▾
New Receipt :	CTRL + (NOT SET) ▾
New Purchase Order :	CTRL + (NOT SET) ▾
New Delivery Note :	CTRL + (NOT SET) ▾
New Packing Slip :	CTRL + (NOT SET) ▾
New Ordering :	CTRL + (NOT SET) ▾
New Packing List :	CTRL + (NOT SET) ▾
New Weight List :	CTRL + (NOT SET) ▾
New Credit Note :	CTRL + (NOT SET) ▾
New Debit Note :	CTRL + (NOT SET) ▾
Customer List :	CTRL + C ▾

At the bottom of the window, there are two buttons: a green "Save" button and a red "Cancel" button.

## 10. CUSTOMIZE DOCUMENT



In EasyBilling, documents come with pre-defined styles and layouts. However, you have the flexibility to customize the documents according to your specific business requirements.

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


## 10.1. Header

**Header**

\* To ensure the image is correctly displayed, please use JPEG image with RGB color mode.

☒ Print header with default layout

Company Information

 **Evinco Solutions Limited**  
 (Line2) : - Provides innovative business software  
 Unit 2202, Causeway Bay Plaza 1  
 489 Hennessy Road  
 Causeway Bay, Hong Kong  
 Tel : +852 31070832 Fax : +852 30209588  
 info@evinco-software.com  
 Website : https://www.evinco-software.com  
 VAT No. : Company Reg. No. :

Click to Add Lo... Remove

Logo Image Size should be in 300x300 pixels

☐ Print header with image file

Click to Add Im... Remove Header Image Size should be 1600x300 pixels

☐ No header print. I will use my letterhead paper.

Letterhead Height (mm) 0

Save Cancel

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Refresh

**Evinco Solutions Limited**  
 - Provides innovative business software  
 Unit 2202, Causeway Bay Plaza 1  
 489 Hennessy Road  
 Causeway Bay, Hong Kong  
 Tel : +852 31070832 Fax : +852 30209588  
 info@evinco-software.com  
 Website : https://www.evinco-software.com

Quote No. **SAMPLE-QUO-001**

Quote To: **Sample Company**  
 New York, United States  
 Tel 21234567  
 VAT No.

Ship To: **Sample Company**  
 New York, United States  
 Tel 34567890  
 VAT No.

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD
ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				
Sub-Total (\$)					59.95
Discount (\$)					9.95
Shipping (\$)					3.00
Total (\$)					53.00
Tax (\$)					10.00
Tax 2 (\$)					11.50
Total (\$)					74.50

Notes  
 Amounts shown are in US dollars.  
 This is a sample.

For And On Behalf Of For And On Behalf Of [CUSTOMER\_NAME]

There are three options available for configuring the header of document in EasyBilling:

- **Print header with default layout:**

This option enables you to print the header using a predefined layout. You can customize the company information in the header and include a logo on either the left or right side. The logo should be in JPG format and have a size of 300x300 pixels or a similar ratio.

- **Print header with an image file:**

With this option, you have the ability to provide a letterhead image that EasyBilling will use as the header during printing. The letterhead image should have dimensions of 1600x300 pixels or a similar ratio.

- **No header print. I will use my letterhead paper:**

If you prefer to print the document on your own letterhead paper, you can choose this option. You will be able to specify the height (in millimeters) for the letterhead.

## 10.2. Numbering

Users have the flexibility to customize the numbering sequence and pattern for the document number according to their company's requirements.

Numbering - Quotation

Define number pattern and starting number for document.  
Document number will be generated in sequence automatically.

**Quotation**

Numbering Pattern :

0 denotes leading zero; # denotes document number  
{YYYY} denotes 4-digits current year; {YY} denotes 2-digits current year;  
{M} denotes current month {D} denotes current day

**Numbering**

Current Starting Number :

Number assigned in next document :

New Starting Number :

**Regular Reset**

☒ Reset starting number

To :

Every ☒ Month ☐ Year

☐ Show Barcode    Format:

The pattern can be configured using variables such as year, month, or day. This allows users to incorporate these variables into the document number format as needed.

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

{D} - Current Day

**Example 1** Numbering Pattern: INV#

Current Number: 123 => Output: INV123

Current Number: 345678 => Output: INV345678

**Example 2** Numbering Pattern: INV0000#

Current Number: 123 => Output: INV00123

Current Number: 345678 => Output: INV345678

**Example 3** Numbering Pattern: INV{YYYY}0000#

Current Number: 123 => Output: INV202300123

Current Number: 345678 => Output: INV2023345678

Furthermore, users can choose to reset the numbering either on a monthly or yearly basis, providing them with the option to start a new numbering sequence at the beginning of each month or year, aligning with their company's practices.

## 10.3. Document Label

You may customize the text labels within the document based on your preferences. You can easily revise the document labels on the left side. As you make changes to the labels, the document preview on the right side will be updated accordingly.

Document Label - Quotation


Rename document label to fit your business needs.

- Use "n" for line break;
- Use [CUSTOMER\_NAME] to load customer name

Label	Rename To
Quote No.	Quote No.
Quotation	Quotation
Quote To	Quote To
Billing Address Tel	Tel
Billing Address Vat	VAT No
Ship To	Ship To
Shipping Address Tel	Tel
Shipping Address Vat	VAT No
Date	Date
Customer Ref. No.	Customer Ref. No.
Sales Rep.	Sales Rep.
Shipping Date	Shipping Date
Shipping Term	Shipping Term
Payment Term	Payment Term
ID	ID
Description	Description
Unit	Unit
Unit Price	Unit Price
Qty	Qty
Total	Total
Sub-Total	Sub-Total
Discount	Discount
Shipping	Shipping
Total	Total
Tax	Tax
Tax 2	Tax 2
Overall Total	Total

Note: Non-english characters will be represented as # in Preview window.  
It will be shown correctly in PDF output with proper font.

Refresh



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info@evinco-software.com  
Website : https://www.evinco-software.com

Quote No. **SAMPLE-QUO-001**

**Quotation**

Quote To

**Sample Company**  
New York, United States  
Tel 21234567  
VAT No

Ship To

**Sample Company**  
New York, United States  
Tel 34567890  
VAT No

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				
Sub-Total (\$)					59.95
Discount (\$)					9.95
Shipping (\$)					3.00
Total (\$)					53.00
Tax (\$)					10.00
Tax 2 (\$)					11.50
Total (\$)					74.50

Notes

Amounts shown are in US dollars.  
This is a sample.

For And On Behalf Of

For And On Behalf Of  
[CUSTOMER\_NAME]

Save

Cancel



## 10.4. Columns

You may customize the table of line items within the document to suit your needs.

You have the option to set the width of each column. If there are any columns that are not needed, you can simply uncheck the corresponding box to remove them from the table.

Document Columns - Quotation

Select columns of item list in document and specify their width.

Show Columns

Width (mm)

☐ #

☐ Photo

☒ ID

☐ Product Description

☐ Supplier

☐ Spec

☐ Info 1

☐ Info 2

☐ Info 3

☒ Unit

☒ Price

☒ Qty

☐ Discount %

☐ Taxable

☒ Total

☐ Tax %

☐ Tax Amount

☐ Total (inc Tax)

To rearrange columns order, visit menu "Customize Document > Document Columns Order"

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Your company name, logo and other infos

Set in menu "Customize Document > Header"

Quote No. SAMPLE-QUO-001

Quotation

To

Sample Company  
New York, United States  
Tel 21234567  
VAT No

Shipping Address

Sample Company  
New York, United States  
Tel 34567890  
VAT No

Date	06-05-2021	Sales Rep.	Peter Smith	Customer Name.	EVS12345
Shipping with in	06-05-2021	Shipping Through	COURIER	Payment Term	COD

ID	Product Description	Unit	Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Amount in Words

Seventy Four Dollar and Fifty Cents Only

Sub-Total (\$)	59.95
Discount (\$)	9.95
Shipping (\$)	3.00
Total (\$)	53.00
SGST (6.00%)	10.00
CGST (6.00%)	11.50
Rounding Adjustment (\$)	0.00
Total (\$)	74.50

Notes

Amounts shown are in US dollars.  
This is a sample.

Accepted

For S-WORLD TECHNOLOGIES

Authorized Signature(s)

Authorized Signature(s)

Save

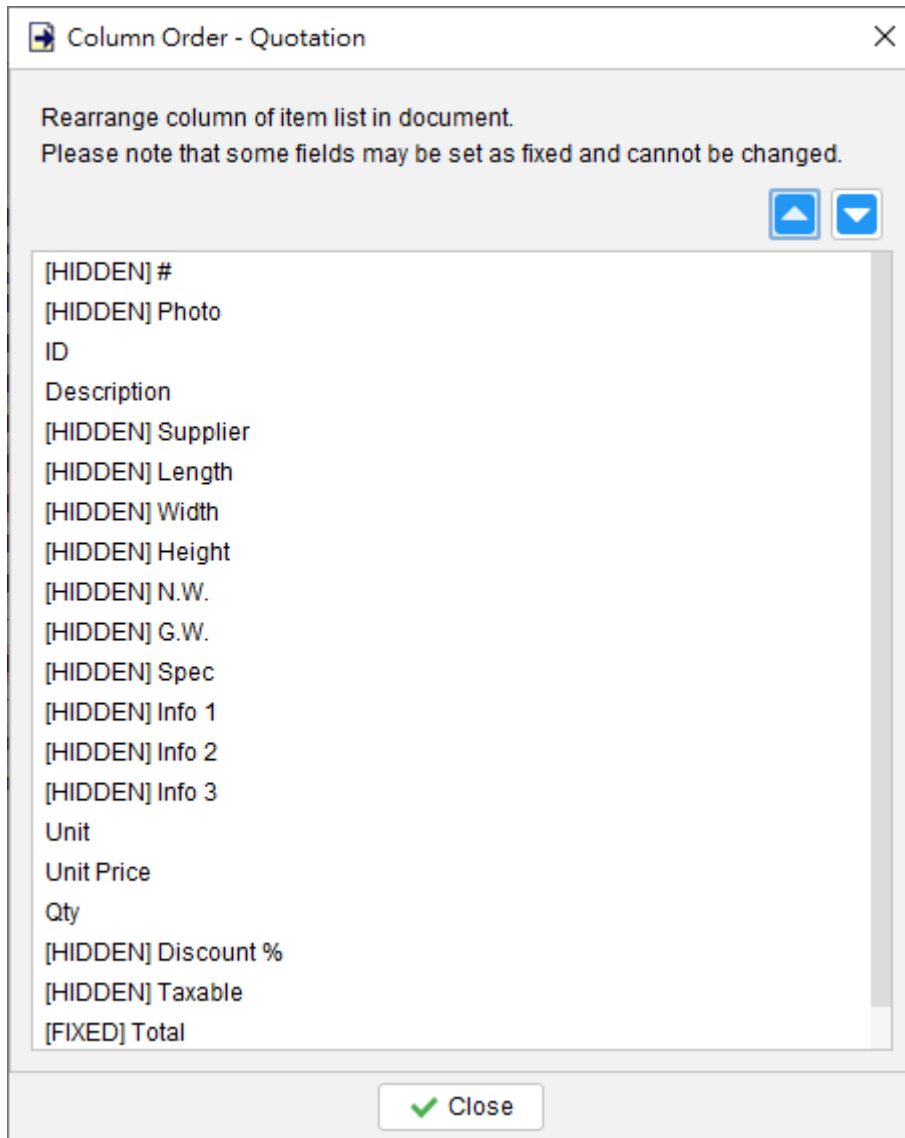
Cancel

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## 10.5. Columns Order

You have the option to rearrange the columns of the line items in the document.

To rearrange the order, simply click and highlight the column name, and then use the arrow button to move it to the desired position. This allows you to easily customize the sequence of columns.



When adding a custom field, you can specify its name, type (Text, Integer Number, Decimal Number, or Date), and width. The width can be set as 1/3, 2/3, or 3/3 of the line, allowing you to control the size and placement of the field within the document.

Please note that any changes made to the custom fields will only be applied to newly created documents and will not affect existing ones.

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## 10.7. Document Color

You may modify the color of various sections within the document, such as the Header, Document Number, Border, Shadow, and Footer. By clicking the corresponding button, you can select the desired color for each part of the document.

Simply click on the document name to switch between different types of documents and adjust their colors. Additionally, if you wish to apply the same color to all types of documents, you can check the box located at the top.

PDF Document Color

— □ ✕

To change color on different parts of document, click on Color button to choose.

☐ Use same look & feel for all documents

Quotation	<div style="width: 15px; height: 15px; background-color: black;"></div>	Header Color	
Proforma Invoice	<div style="width: 15px; height: 15px; background-color: black;"></div>	Document Number Color	
Invoice	<div style="width: 15px; height: 15px; background-color: black;"></div>	Document Line Color	
Tax Invoice	<div style="width: 15px; height: 15px; background-color: #8B4513;"></div>		
Receipt			
Purchase Order			
Delivery Note	<div style="width: 15px; height: 15px; background-color: red;"></div>	Stamp Color	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">Square</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">Round</div>
Packing Slip			
Ordering	<div style="width: 15px; height: 15px; background-color: black;"></div>	Border Color	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">Disable</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">Enable</div>
Packing List			
Weight List	<div style="width: 15px; height: 15px; background-color: #FFDAB9;"></div>	Shadow Color	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">Disable</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">Enable</div>
Credit Note	<div style="width: 15px; height: 15px; background-color: black;"></div>	Label Color	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">NORMAL</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">BOLD</div>
Debit Note	<div style="width: 15px; height: 15px; background-color: black;"></div>	Entry Color	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">NORMAL</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">BOLD</div>
	<div style="width: 15px; height: 15px; background-color: #d3d3d3;"></div>	Alternate Row Color in Item List	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">Disable</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">Enable</div>
	<div style="width: 15px; height: 15px; background-color: white;"></div>	Line Color in Item List	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #d3d3d3;">Disable</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #007bff; color: white;">Enable</div>
	<div style="width: 15px; height: 15px; background-color: black;"></div>	Footer Color	

Note: Non-english characters will be represented as # in Preview window.  
It will be shown correctly in PDF output with proper font.

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Quote No. **SAMPLE-QUO-001**

**Quotation**

Quote To

Sample Company  
 New York, United States  
 Tel 21234567  
 VAT No

Ship To

Sample Company  
 New York, United States  
 Tel 34567890  
 VAT No

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Sub-Total (\$)	59.95
Discount (\$)	9.95
Shipping (\$)	3.00
Total (\$)	53.00
Tax (\$)	10.00
Tax 2 (\$)	11.50
Total (\$)	74.50

Notes

Amounts shown are in US dollars.  
 This is a sample.

Save

Cancel

## 10.8. Company Chop & Signature

EasyBilling provides two signature boxes located at the bottom of the document. You have the option to define the default company chop and signature image for these signature boxes.

To load your company chop and signature image, simply click the designated button. You can specify whether the image should be applied to the left box, right box, or both. The image should have dimensions of 300x300 pixels.

By clicking on the document name, you can switch between different types of documents and set the company chop and signature image accordingly. If you wish to use the same chop and signature for all types of documents, you can check the box located at the top.

The screenshot shows a dialog box titled "Chop & Signature" with a close button (X) in the top right corner. Inside the dialog, there is a text box stating: "There are two Signature Boxes at the bottom of document. Specify default chop & signature images for them." Below this text is a checkbox labeled "Use same chop & signature for all documents" which is currently unchecked. On the left side, there is a list of document types: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Weight List, Credit Note, and Debit Note. The "Quotation" item is selected. To the right of the list, there are two image selection areas. The top area shows a preview of a company chop (a stylized signature) with an "A..." button and a "Remove" button. The bottom area shows a preview of a signature image with an "Add 'Signature' image" button and a "Remove" button. To the right of these image areas are two sets of radio buttons. The top set of radio buttons corresponds to the chop image, and the bottom set corresponds to the signature image. Both sets have three options: "Apply to Left Signature Box", "Apply to Right Signature Box", and "Apply to Left & Right Signature Box". In both cases, the "Apply to Left & Right Signature Box" option is selected. At the bottom of the dialog, there are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

## 10.9. Footer

You may customize the footer for different documents in EasyBilling. The footer consists of two lines.

The first line of the footer is divided into three parts: left, center, and right. You can choose to display the Page Number, Date, Document Number, or input your own custom text in each respective part. The second line of the footer allows you to specify the company's contact information.

Additionally, you can use an image as the footer. The image should be in JPG format and have dimensions of 1600x120 pixels or a similar ratio.

To set the footer for a specific document, click on the document name and make the necessary adjustments.

If you wish to use the same footer for all types of documents, you can check the box located at the top.

Footer

Document footer can be set with default layout or an image file.

In default layout, there are three parts in document footer: left, center and right. It can be set with a Page Number, Date, Document Number or your own text. Contact information can also be added to the footer.

☐ Use same footer for all documents

Quotation

Proforma Invoice

Invoice

Tax Invoice

Receipt

Purchase Order

Delivery Note

Packing Slip

Ordering

Packing List

Weight List

Credit Note

Debit Note

Left : ☒ Date

Center : ☐ Page No. (Page #)

Right : ☒ Page No. (Page #)

☒ Print footer with default layout

Copy information from Header

Unit 2202, Causeway Bay Plaza 1

489 Hennessy Road

Causeway Bay, Hong Kong

Tel : +852 31070832

Fax : +852 30209588

info@evinco-software.com

Website : https://www.evinco-software.com

☐ Print footer with image file

Click to Add Image

Remove

Footer Image Size should be 1600x120 pixels

Refresh

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Quotation

Quote To

Sample Company  
New York, United States  
Tel 21234567  
VAT No

Ship To

Sample Company  
New York, United States  
Tel 34567890  
VAT No

Date 2023-11-10 Sales Rep. Peter Smith Customer Ref. No. EVS12345

Shipping Date 2023-11-10 Shipping Term COURIER Payment Term COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Sub-Total (\$)

59.95

Discount (\$)

9.95

Shipping (\$)

3.00

Total (\$)

53.00

Tax (\$)

10.00

Tax 2 (\$)

11.50

Total (\$)

74.50

Notes

Amounts shown are in US dollars.  
This is a sample.

For And On Behalf Of

For And On Behalf Of  
[CUSTOMER\_NAME]

Authorized Signature(s)

Authorized Signature(s)

2023-11-10

Page 1

Unit 2202, Causeway Bay Plaza 1 489 Hennessy Road Causeway Bay, Hong Kong

Tel : +852 31070832 Fax : +852 30209588 info@evinco-software.com Website : https://www.evinco-software.com

Save

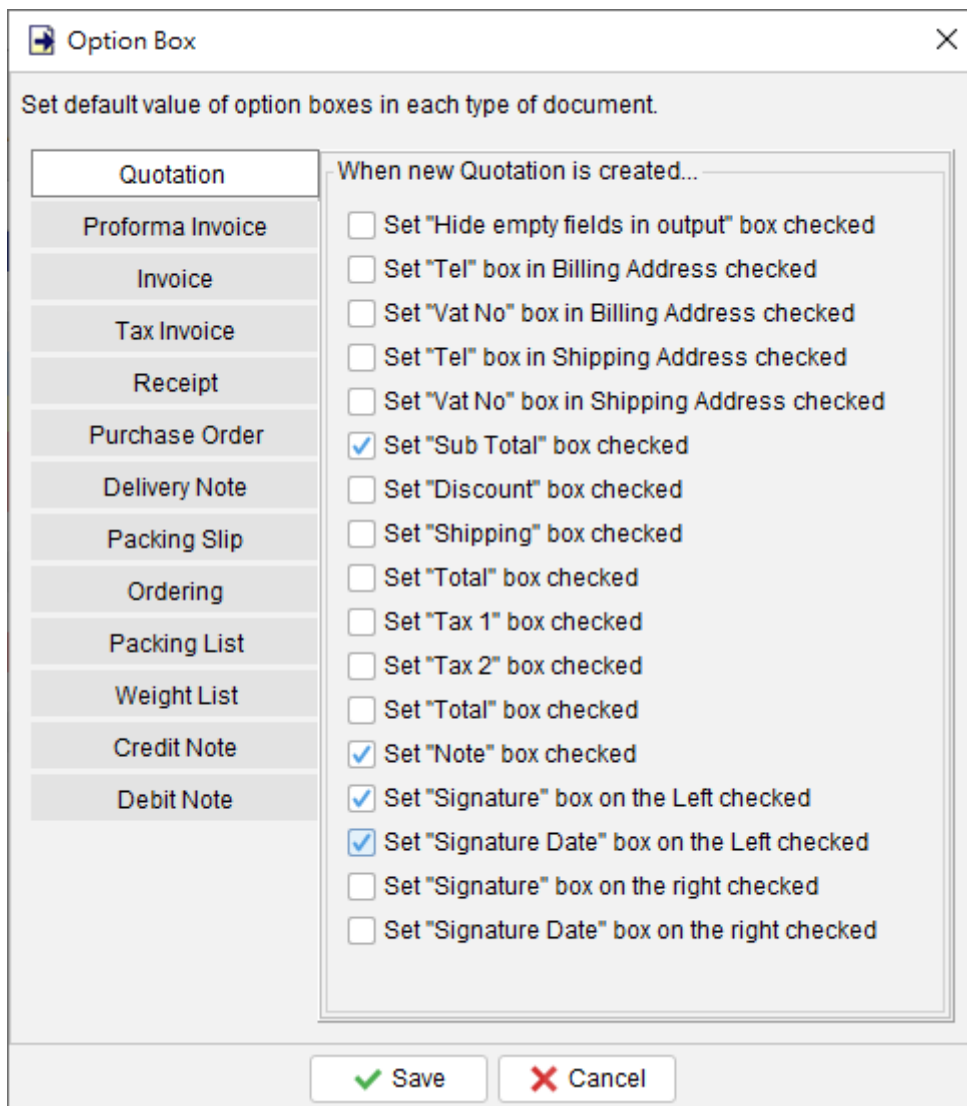
Cancel

## 10.10.Option Box

In EasyBilling documents, various checkboxes are available to indicate whether specific fields should be shown or hidden in the output document.

You have the option to specify the default values for these checkboxes when creating a new document. This allows you to predefine whether certain fields should be shown or hidden by default in newly created documents.

To set the default values of these option boxes for different document types, simply click on the document name and adjust the checkboxes accordingly. This enables you to customize the default visibility of specific fields based on your preferences for each document type.



The 'Option Box' dialog window is titled 'Option Box' and contains a list of document types on the left and a list of checkboxes on the right. The document types are: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Weight List, Credit Note, and Debit Note. The checkboxes are grouped under the heading 'When new Quotation is created...'. The checkboxes are: Set 'Hide empty fields in output' box checked, Set 'Tel' box in Billing Address checked, Set 'Vat No' box in Billing Address checked, Set 'Tel' box in Shipping Address checked, Set 'Vat No' box in Shipping Address checked, Set 'Sub Total' box checked, Set 'Discount' box checked, Set 'Shipping' box checked, Set 'Total' box checked, Set 'Tax 1' box checked, Set 'Tax 2' box checked, Set 'Total' box checked, Set 'Note' box checked, Set 'Signature' box on the Left checked, Set 'Signature Date' box on the Left checked, Set 'Signature' box on the right checked, and Set 'Signature Date' box on the right checked. The 'Save' button is green and the 'Cancel' button is red.

Document Type	When new Quotation is created...
Quotation	<input type="checkbox"/> Set "Hide empty fields in output" box checked
Proforma Invoice	<input type="checkbox"/> Set "Tel" box in Billing Address checked
Invoice	<input type="checkbox"/> Set "Vat No" box in Billing Address checked
Tax Invoice	<input type="checkbox"/> Set "Tel" box in Shipping Address checked
Receipt	<input type="checkbox"/> Set "Vat No" box in Shipping Address checked
Purchase Order	<input checked="" type="checkbox"/> Set "Sub Total" box checked
Delivery Note	<input type="checkbox"/> Set "Discount" box checked
Packing Slip	<input type="checkbox"/> Set "Shipping" box checked
Ordering	<input type="checkbox"/> Set "Total" box checked
Packing List	<input type="checkbox"/> Set "Tax 1" box checked
Weight List	<input type="checkbox"/> Set "Tax 2" box checked
Credit Note	<input type="checkbox"/> Set "Total" box checked
Debit Note	<input checked="" type="checkbox"/> Set "Note" box checked
	<input checked="" type="checkbox"/> Set "Signature" box on the Left checked
	<input checked="" type="checkbox"/> Set "Signature Date" box on the Left checked
	<input type="checkbox"/> Set "Signature" box on the right checked
	<input type="checkbox"/> Set "Signature Date" box on the right checked

Save Cancel

In addition to selecting the paper size, you can also choose between three types of document layouts: Modern, Basic, and Table. These layout options provide different design styles for your documents, allowing you to customize the overall appearance based on your preferences and requirements.

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## 10.12. Preferences

Preferences

**Document Name**

Rename Document on User Interface

Turn off document and hide it from user interface, if it is not necessary.

\* The changes will be effective on next software startup.

Quotation	<input type="text"/>	On	Off
Proforma Invoice	<input type="text"/>	On	Off
Invoice	<input type="text"/>	On	Off
Tax Invoice	<input type="text"/>	On	Off
Receipt	<input type="text"/>	On	Off
Purchase Order	<input type="text"/>	On	Off
Delivery Note	<input type="text"/>	On	Off
Packing Slip	<input type="text"/>	On	Off
Ordering	<input type="text"/>	On	Off
Packing List	<input type="text"/>	On	Off
Weight List	<input type="text"/>	On	Off
Credit Note	<input type="text"/>	On	Off
Debit Note	<input type="text"/>	On	Off

Save Cancel

In the Document Preferences section, you can specify various settings for your documents. These settings include:

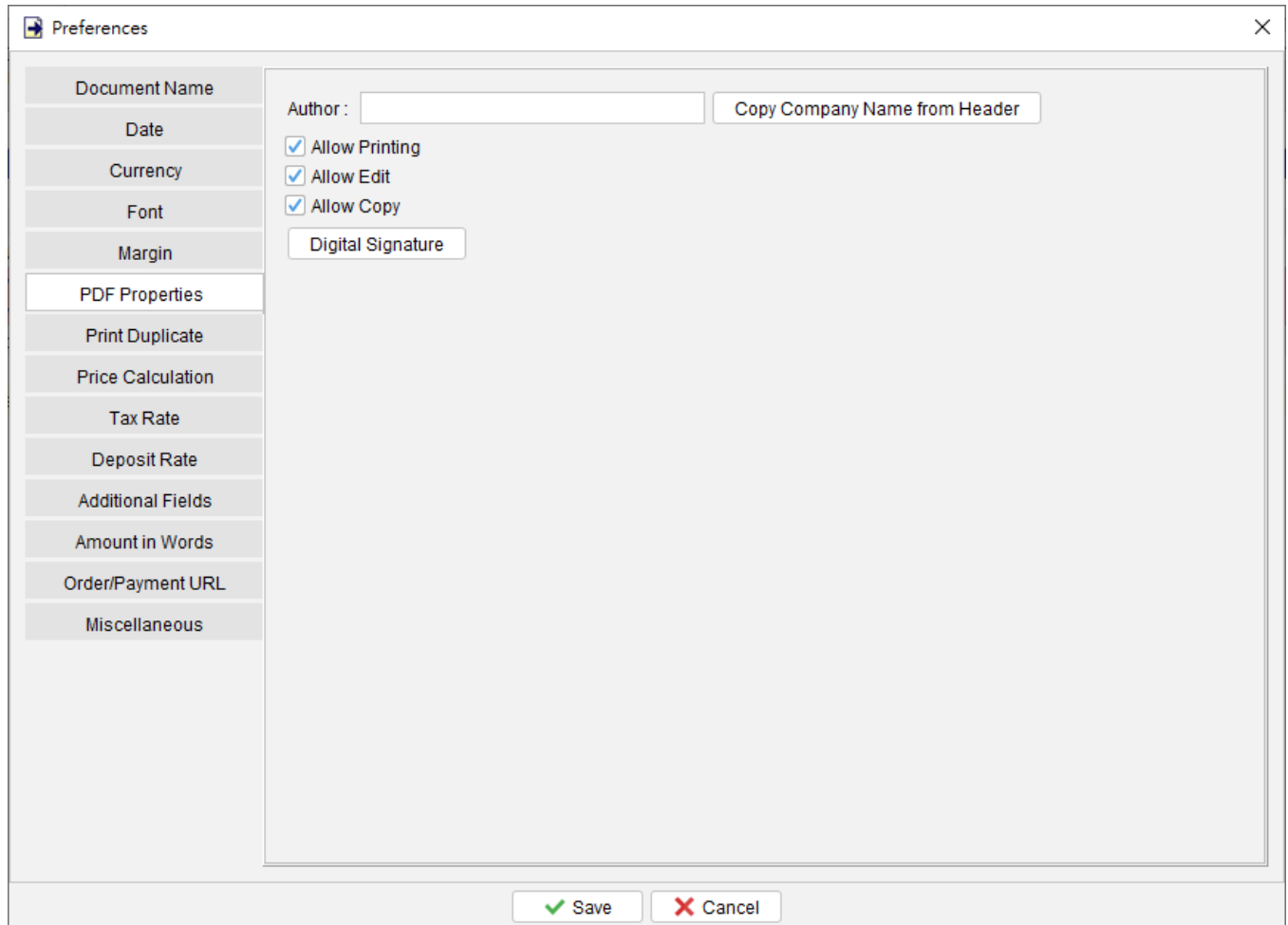
- **Document Name:** User may rename documents displayed in the user interface, allowing for personalized and easily identifiable document names.
- **Date:** Set the default date for new documents as either Today's date or leave it empty. Set the desired format for dates and choose a date separator that suits your preference.
- **Currency:** Specify the default currency to be used in EasyBilling and define the number of decimal places for the subunit, if applicable.
- **Font:** Choose the default font type, font size, and writing mode for your documents.
- **Margin:** Set the page margin and address margin for your documents.
- **PDF Properties:** Specify permissions for the PDF output, such as allowing or restricting printing, editing, and copying. You can also set a digital signature for the PDF file.

- **Print Duplicate:** Show the "Print Duplicate/Triplicate" button in the document window and set the label for Duplicate/Triplicate copies.
- **Price Calculation:** By default, EasyBilling calculates the total amount of line items based on quantity. You have the option to set the price calculation by different measurements, such as length or weight.
- **Tax Rate:** Set the default tax rate and its calculation. You can also specify whether the shipping, packaging, and insurance fields are taxable.
- **Deposit Rate:** Set the default deposit rate for Proforma Invoice, Invoice, and Tax Invoice.
- **Additional Field:** Choose to include an Insurance, Packaging, Rounding Adjustment field in the selected document.
- **Amounts in Words:** Choose to include an Amount in Words field in the selected document.
- **Order/Payment URL:** Choose to include an Order/Payment URL field in the selected document.
- **Miscellaneous:** Set the default quantity of line items, enable or disable multi-line input in the description column of line items, include an extra blank line in line items, and set the minimum height of the note field.

These preferences allow you to customize various aspects of your documents to align with your specific needs and preferences.

### 10.12.1. PDF Properties

In EasyBilling, you have the ability to adjust the settings of the PDF output for your documents to include options such as Allow Printing, Allow Edit, and Allow Copy. These settings are designed to provide protection and control over the usage of your document.



The screenshot shows the 'Preferences' dialog box with the 'PDF Properties' tab selected. The left sidebar contains a list of settings categories: Document Name, Date, Currency, Font, Margin, PDF Properties (selected), Print Duplicate, Price Calculation, Tax Rate, Deposit Rate, Additional Fields, Amount in Words, Order/Payment URL, and Miscellaneous. The main area of the dialog is divided into two sections. The top section contains an 'Author:' text field, a 'Copy Company Name from Header' checkbox, and three checked checkboxes: 'Allow Printing', 'Allow Edit', and 'Allow Copy'. Below these is a 'Digital Signature' button. The bottom section is empty. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

By enabling the Allow Printing option, recipients of the PDF document will be able to print a physical copy of the document if needed.

The Allow Edit option allows users to make modifications to the content and layout of the PDF document using appropriate editing software.

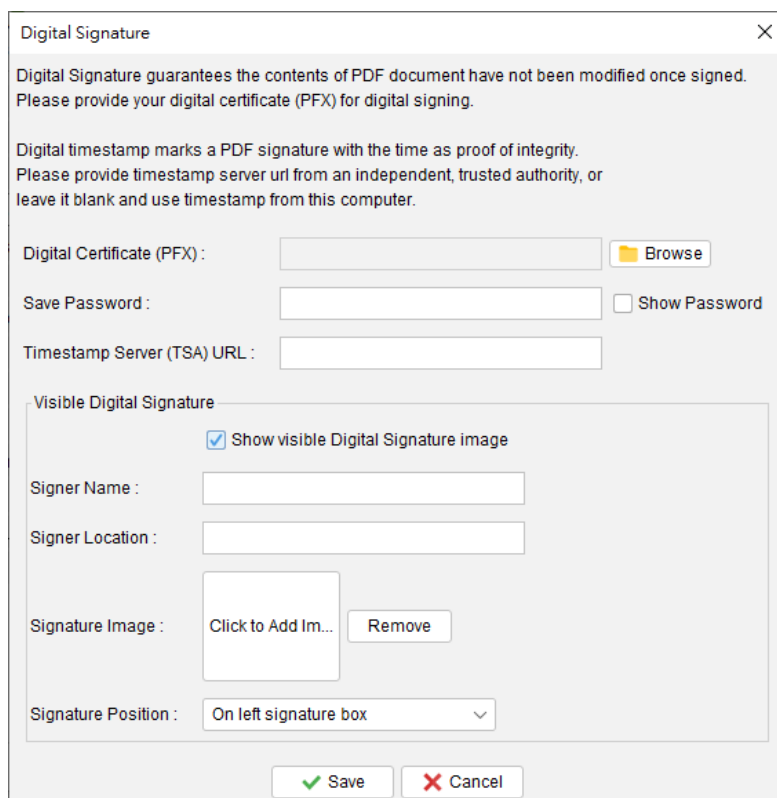
Enabling the Allow Copy option permits users to copy and extract text or other content from the PDF document for their own use or reference.

## **Digital Signature**

A Digital Signature ensures the integrity of a PDF document by guaranteeing that its contents have not been altered since the document was signed.

In EasyBilling, you have the option to add a Digital Signature to the PDF output of your documents. To do so, you will need to provide your Digital Certificate in PFX format and specify a Timestamp Server URL. The Digital timestamp includes the time of the signature as proof of the document's integrity. You can either provide a Timestamp Server URL from a trusted and independent authority or leave it blank to use the timestamp from the local computer.


Furthermore, you have the ability to configure the visibility of the Digital Signature on the document. You can set the location of the Signature Boxes at the bottom of the document or choose other preferred locations as desired.



The screenshot shows a 'Digital Signature' dialog box with the following fields and options:

- Digital Certificate (PFX):** A text input field with a 'Browse' button.
- Save Password:** A text input field with a 'Show Password' checkbox.
- Timestamp Server (TSA) URL:** A text input field.
- Visible Digital Signature:** A section containing:
  - ☒ Show visible Digital Signature image
  - Signer Name:** A text input field.
  - Signer Location:** A text input field.
  - Signature Image:** A placeholder box with a 'Click to Add Im...' button and a 'Remove' button.
  - Signature Position:** A dropdown menu currently set to 'On left signature box'.
- Buttons:** 'Save' (with a green checkmark) and 'Cancel' (with a red X) at the bottom.

Below is the sample output. The visible digital signature is set on the Signature Box.



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Quote No. QUO-202311-10002

---

Quote To

Ship To


Date	2023-11-16	Sales Rep.		Customer Ref. No.	
Shipping Date		Shipping Term		Payment Term	

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)

Notes

This Quotation is valid for 30Days

For And On Behalf Of



Digitally signed by:  
Evinco  
Location:  
Hong Kong  
Date:  
2023-11-16 18:22

Authorized Signature(s)

### 10.12.2. Print Duplicate

EasyBilling offers the convenient feature of printing duplicate or triplicate copies of your documents. Within the Preferences settings, you have the option to enable the Print Duplicate or Triplicate button. Once activated, an additional print button will be added to the document window, allowing you to easily select the desired number of copies.

Furthermore, you can customize the labeling of the original or duplicate copies of the document. By specifying a label, it will be printed on the top right corner of each copy, ensuring clear identification and differentiation between the various copies.

The screenshot shows the 'Preferences' dialog box with the 'Print Duplicate' tab selected. The left sidebar lists various settings categories, and the main area contains options for enabling the 'Print Duplicate' button and customizing labels for original, duplicate, and triplicate copies. The 'Print on' option is set to 'Right', and the 'Shift upwards' value is 3 mm.

Document Name  
Date  
Currency  
Font  
Margin  
PDF Properties  
Print Duplicate  
Price Calculation  
Tax Rate  
Deposit Rate  
Additional Fields  
Amount in Words  
Order/Payment URL  
Miscellaneous

Show "Print Duplicate" button.  
When print duplicate/triplicate, the label set below will be added to top left/right corner on the duplicate copy.  
Minor adjustment can be added to avoid overprinting on document header.

☒ Don't show  
☐ Show "Print 2-in-1" Button (2 Copies in 1 page)  
☐ Show "Print Duplicate" Button  
☐ Show "Print Triplicate" Button

Original Copy Label  Color   
Duplicate Copy Label  Color   
Triplicate Copy Label  Color

Print on ☐ Left ☒ Right  
Shift upwards  mm

Save Cancel

The screenshot shows the 'Quotation' window with a toolbar at the top. The 'Print Duplicate' button, which features a printer icon with the number '2', is highlighted with a red box and a red arrow. Below the toolbar, the 'Document Details' tab is active, displaying various fields for quote information.

Quotation  
File Export Font Font Size Password Buy Now

Save Preview Print **Print Duplicate** Print Address Send Email Quick Export Set Password

Document Details Line Item Photo Attachment PDF Attachment Private

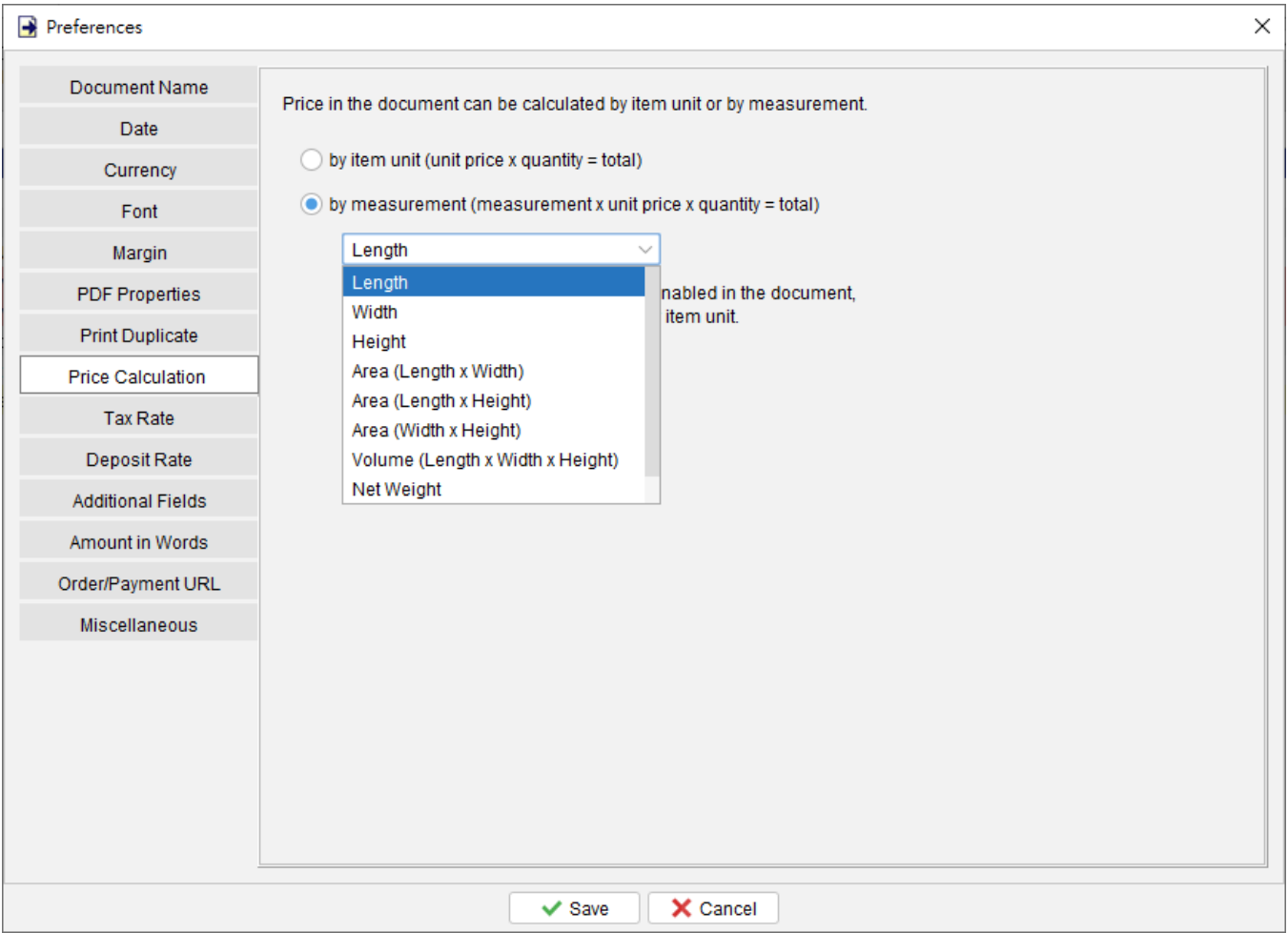
☐ Hide empty fields in output

Quote No. QUO-202311-10003 Stamp  
Currency Hong Kong Dollar, \$  
Date 2023 - 11 - 16 (YYYY-MM-DD)  
Sales Rep.  
Customer Ref. No.  
Shipping Date  
Shipping Term

10.12.3. Price Calculation

In EasyBilling, the default calculation for the total amount of a line item is based on the quantity and unit price. However, you have the flexibility to modify the calculation method for line items by incorporating different measurements such as length, height, width, area, or volume.

By allowing this customization, EasyBilling enables you to adapt the calculation logic according to your specific needs. This feature is particularly useful when dealing with items that require measurements to determine their total price accurately.



#### 10.12.4. Tax Rate

EasyBilling offers the flexibility to incorporate up to three tax rate fields for calculating the tax amount of your documents. These tax fields can be configured to calculate taxes based on the total amount or the total amount plus other tax fields.

Additionally, you have the option to specify whether the shipping, packaging, and insurance fields should be subject to taxation or remain tax-exempt.

In cases where tax fields are not applicable for your country's requirements or if you simply do not need them, EasyBilling provides the ability to hide all tax-related fields completely. This allows for a streamlined interface that aligns with your specific taxation needs.

The screenshot shows the 'Preferences' window with the 'Tax Rate' tab selected in the left sidebar. The main area contains the following settings:

- ☐ Hide all tax related fields and columns in software. [\[?\]](#)
- If tax rate is provided, tax amount will be calculated automatically. But you can overwrite tax amount in document.
- Tax Rate 1:  %  (dropdown)
- Tax Rate 2:  %  (dropdown)
- ☐ Show Third Tax box
- Tax Rate 3:  %  (dropdown)
- Rounding Tax to :  decimal points :
- ☒ Shipping field is taxable
- ☒ Packaging field is taxable
- ☐ Insurance field is taxable

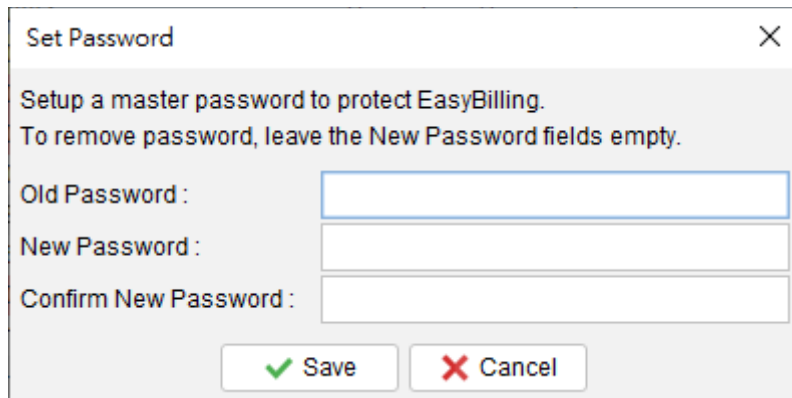
At the bottom of the window are 'Save' and 'Cancel' buttons.



## 11. TOOLS

### 11.1. Set Password

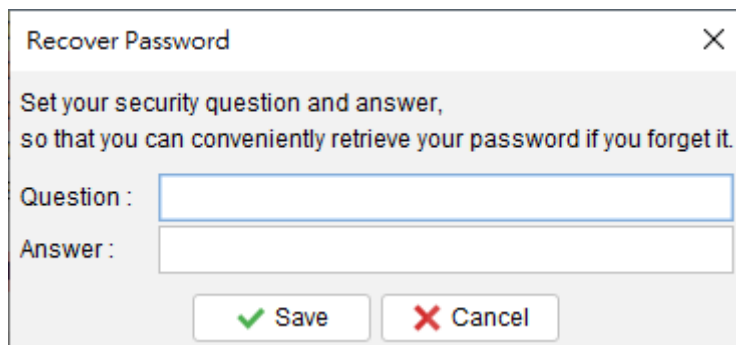
To enhance the security of your EasyBilling system, you have the option to set a password. Each time you start EasyBilling, you will be prompted to enter the password. If you wish to remove the password, simply enter the old password and leave the other fields blank. Clicking [Submit] will remove the password.



The 'Set Password' dialog box has a title bar with a close button (X). The main text reads: 'Setup a master password to protect EasyBilling. To remove password, leave the New Password fields empty.' Below this, there are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. At the bottom, there are two buttons: a green 'Save' button with a checkmark icon and a red 'Cancel' button with an X icon.

### 11.2. Recover Password Option

You can set a recovery password option by specifying a question and answer. In case you forget the password, you can click the [Forget Password] button in the Password Dialog. EasyBilling will display the pre-set question. If you answer the question correctly, the password will be revealed. To configure this "Password Recovery Option," you must input the password to confirm that you have the necessary access rights for EasyBilling.

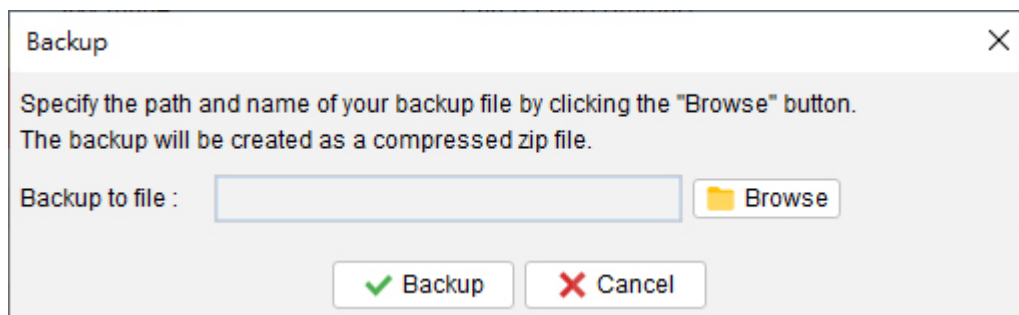


The 'Recover Password' dialog box has a title bar with a close button (X). The main text reads: 'Set your security question and answer, so that you can conveniently retrieve your password if you forget it.' Below this, there are two input fields: 'Question:' and 'Answer:'. At the bottom, there are two buttons: a green 'Save' button with a checkmark icon and a red 'Cancel' button with an X icon.

### 11.3. Backup

EasyBilling offers the ability to create a comprehensive backup of all your data. This backup includes all documents, reports, customer lists, supplier items, item lists, and software settings in the current workspace.

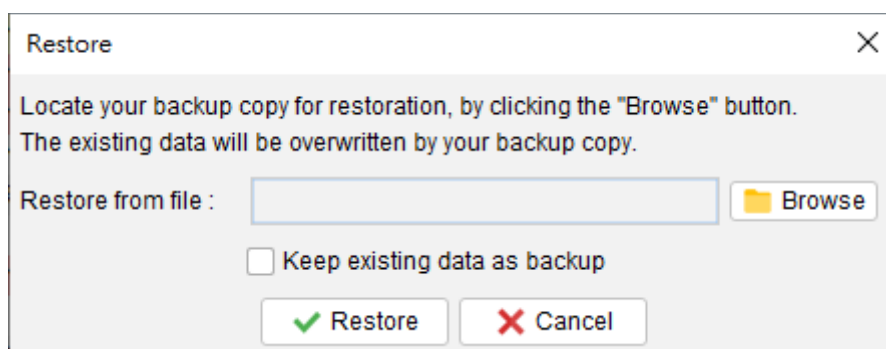
To initiate the backup process, click on the [Browse] button and specify a filename for the backup file. The backup will be created in a zip format, ensuring that all the necessary data is securely stored and compressed for efficient storage.



The screenshot shows a dialog box titled "Backup" with a close button (X) in the top right corner. The main text inside the dialog reads: "Specify the path and name of your backup file by clicking the 'Browse' button. The backup will be created as a compressed zip file." Below this text, there is a label "Backup to file :" followed by a text input field. To the right of the input field is a "Browse" button with a folder icon. At the bottom of the dialog, there are two buttons: "Backup" with a green checkmark icon and "Cancel" with a red X icon.

### 11.4. Restore

Users have the ability to restore backup data in EasyBilling effortlessly. By clicking on the [Browse] icon, they can locate and select the backup zip file. Once the backup file is chosen, EasyBilling will initiate the restoration process. This process involves the restoration of documents, reports, data, and all software settings from the backup file.



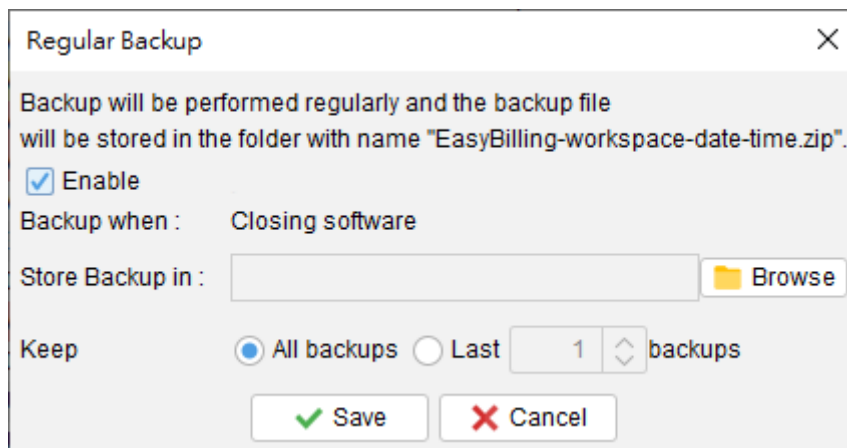
The screenshot shows a dialog box titled "Restore" with a close button (X) in the top right corner. The main text inside the dialog reads: "Locate your backup copy for restoration, by clicking the 'Browse' button. The existing data will be overwritten by your backup copy." Below this text, there is a label "Restore from file :" followed by a text input field. To the right of the input field is a "Browse" button with a folder icon. Below the input field, there is a checkbox labeled "Keep existing data as backup". At the bottom of the dialog, there are two buttons: "Restore" with a green checkmark icon and "Cancel" with a red X icon.

## 11.5. Regular Backup

EasyBilling offers users the option to enable the regular backup feature, ensuring that backups are automatically created when closing the software.

To set this up, simply click on the [Browse] icon and select a folder on your computer where you want the backup file to be stored. The backup file will be saved in the selected folder in a compressed zip format, containing the documents, settings, and all the data in the current workspace.

Additionally, you have the flexibility to specify the number of backup file copies you wish to keep.



The image shows a 'Regular Backup' dialog box with a close button (X) in the top right corner. The dialog contains the following elements:

- A text box stating: "Backup will be performed regularly and the backup file will be stored in the folder with name "EasyBilling-workspace-date-time.zip"."
- A checked checkbox labeled "Enable".
- A label "Backup when :" followed by the text "Closing software".
- A label "Store Backup in :" followed by an empty text input field and a "Browse" button with a folder icon.
- A "Keep" section with two radio buttons: "All backups" (selected) and "Last".
- A numeric input field containing the value "1" with up and down arrow buttons, followed by the text "backups".
- At the bottom, there are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

## 12. REGISTER

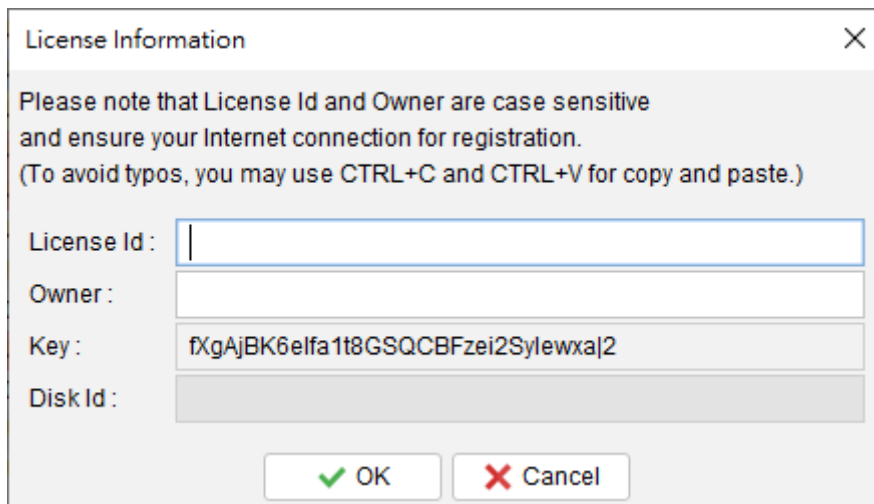
### 12.1. Trial Version

The Trial Version of EasyBilling offers the same functionality as the registered version; however, it has a limitation where users are only allowed to create a maximum of 25 documents in total. To unlock the full potential of EasyBilling and remove the restrictions imposed by the Trial Version, it is necessary to obtain a license and register your copy of EasyBilling.

### 12.2. Registration

To register EasyBilling,

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

A screenshot of a 'License Information' dialog box. The title bar says 'License Information' with a close button (X). The main text area contains the following instructions: 'Please note that License Id and Owner are case sensitive and ensure your Internet connection for registration. (To avoid typos, you may use CTRL+C and CTRL+V for copy and paste.)'. Below this, there are four input fields: 'License Id :', 'Owner :', 'Key :', and 'Disk Id :'. The 'Key :' field is pre-filled with the text 'fXgAjBK6elfa1t8GSQCBFzei2Sylewxa|2'. At the bottom of the dialog, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

(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.

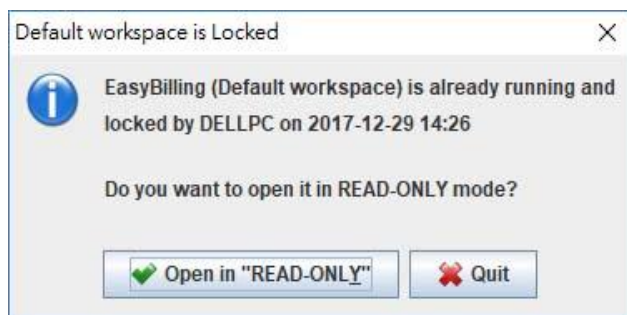
Note: If firewall is setup and block the connection of registration, the registration cannot be completed. You may temporarily disable the firewall to allow the registration go through.

## 13. DATABASE LOCKED

### 13.1. Database locked / Read-Only Mode

EasyBilling is designed as a standalone software that implements a database lock mechanism to safeguard the integrity of the data. When EasyBilling is running, it locks the database to prevent concurrent access.

If a second instance of EasyBilling attempts to run on the same database (Workspace) simultaneously, a dialog will appear notifying the user about the situation. In this dialog, the user has the option to run EasyBilling in READ-ONLY mode.



When running in READ-ONLY mode, users can only view the information stored in the database. They are unable to create or edit documents, modify customer or item information, or adjust software settings. However, they can still view, print, and preview documents. Additionally, users can create Draft documents which can be processed as normal documents once the database is connected in its regular mode.