



EasyBilling Software

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

EasyBilling User Guide

Prepared by EasyBilling Development Team
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1. SYSTEM REQUIREMENTS


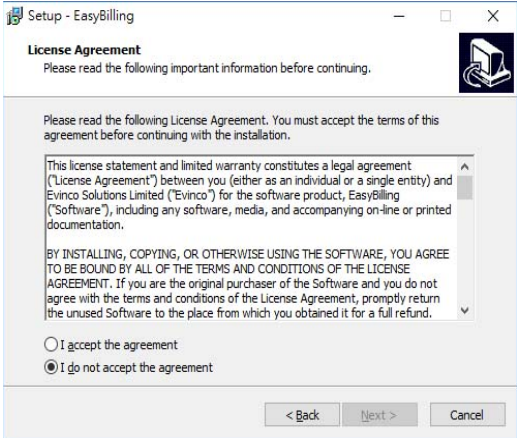
- Operating System:

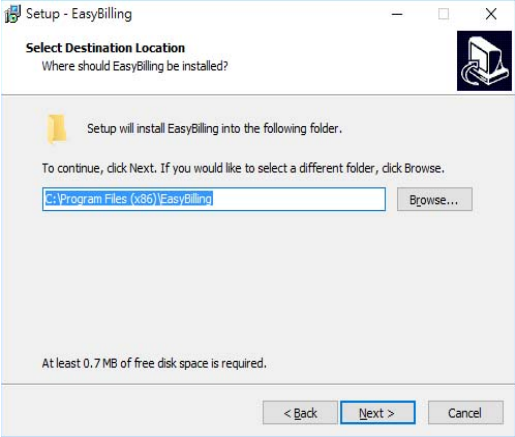
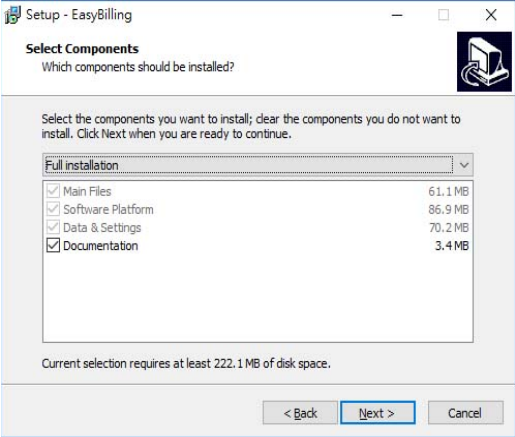
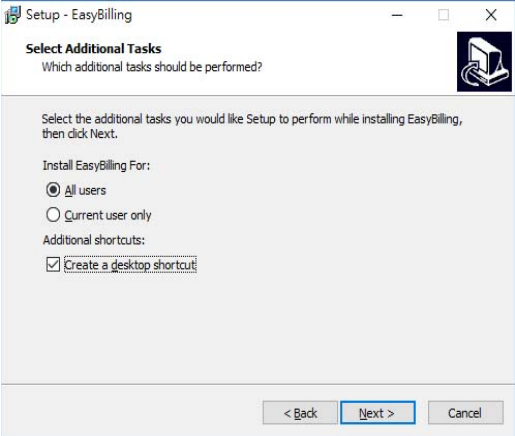
Microsoft Windows 11, 10, 8.1, 8, 7

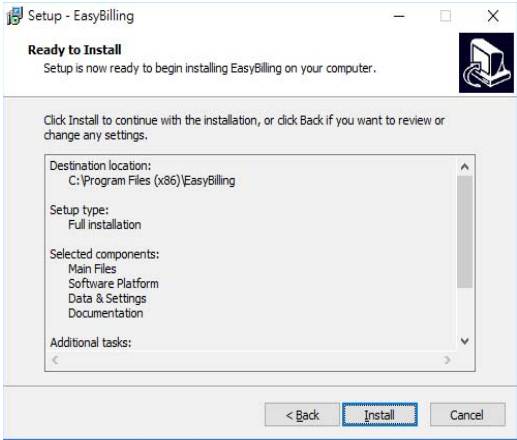
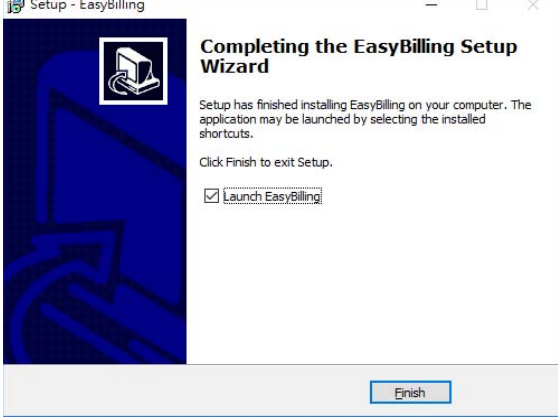
Mac OSX 10.12 or later

2. INSTALLATION FOR WINDOWS

2.1. Install

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

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

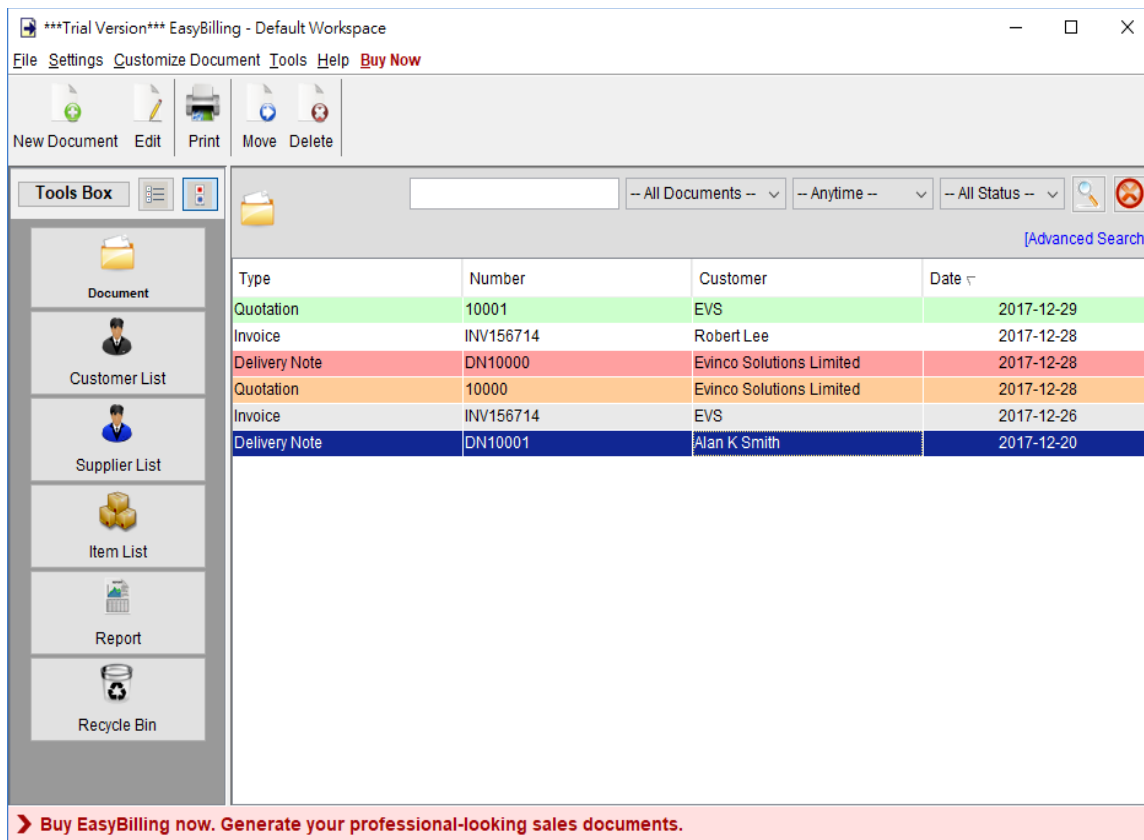
6. Start the installation.	
7. Installation Finish.	

2.2. Uninstall

To uninstall EasyBilling,

1. If you're using EasyBilling, quit it.
2. Click Start, point to “Program Files > EasyBilling”.
3. Click “Uninstall EasyBilling”.
4. Follow the on-screen instructions. EasyBilling will be uninstalled

3. USING EASYBILLING



The main screen of EasyBilling is shown above.

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

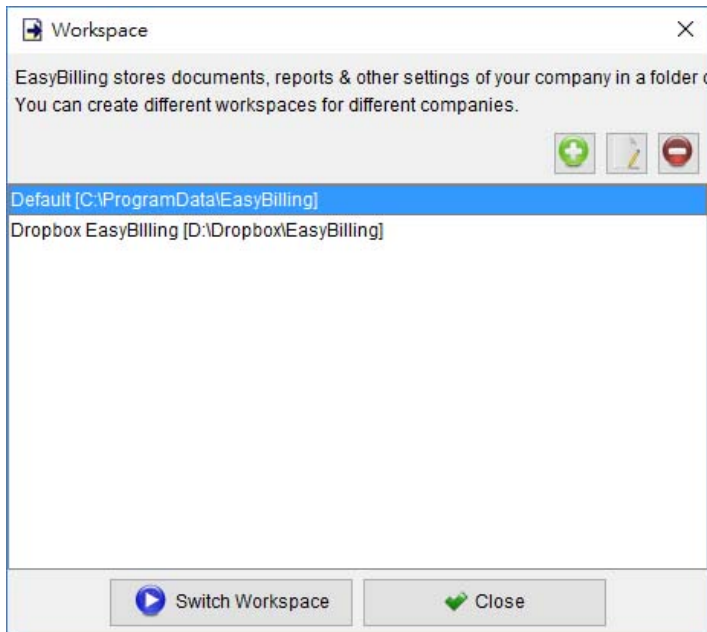
The next is the tool bar, which provides a quick access to some commonly used functions. The tool bar will varies depends on the Function Panel shown.

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

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

3.1. Workspace

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



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

3.2. Connect and Share same Database from different EasyBilling

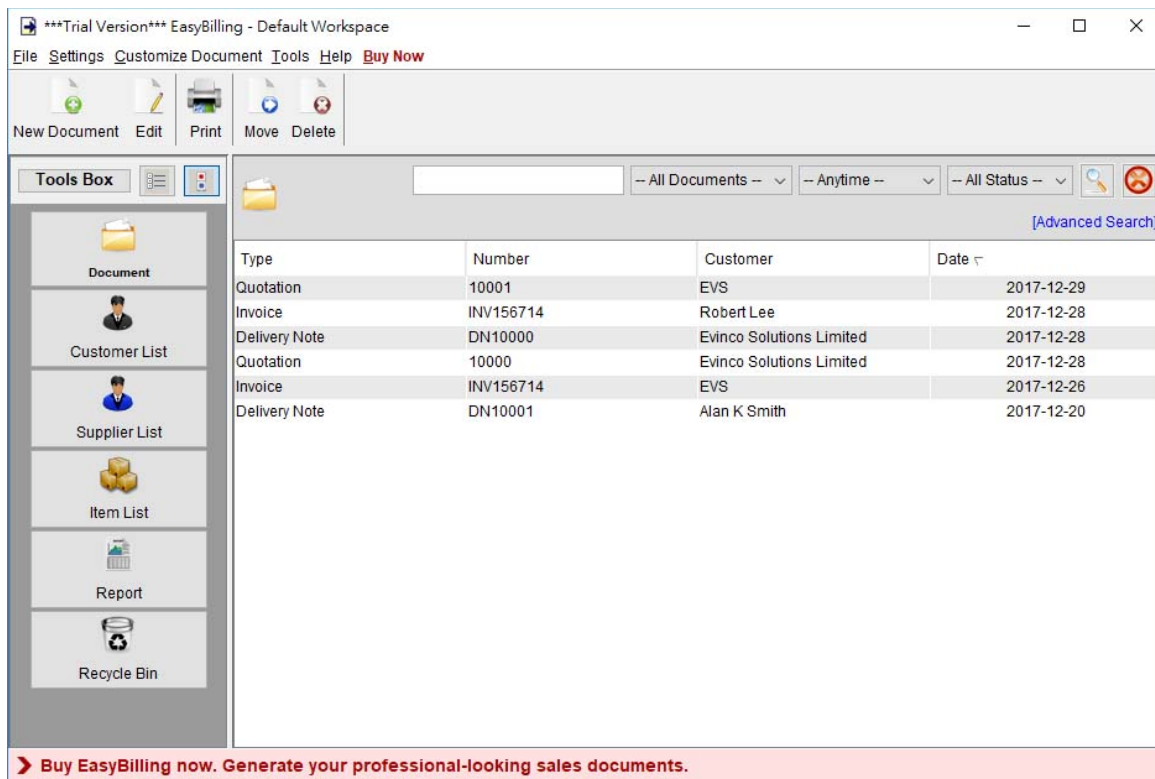
EasyBilling is a standalone application, and does not have network/multi-user access features.

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

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

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

4. DOCUMENT



The user interface for managing Documents is shown above.

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

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

Edit – Edit selected document.

Print – Print selected document.

Move – Move selected document into another folder.

Delete – Delete selected document.

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

4.1. Quotation

The screenshot shows the 'Quotation' application window. 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 input fields: 'Quote No.' (QUOYYYYY10002), 'Currency' (United States Dollar, \$), 'Date' (2017-12-29), 'Sales Rep.', 'Customer Ref. No.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. A 'Customer Information' section at the bottom includes 'Quote To' and 'Ship To' address fields, and checkboxes for 'Tel'. Buttons for 'Load from Customer List' and 'Add to Customer List' are located at the bottom right.

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

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

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

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

Font Size – Specify the font size.

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

Quotation Details

There are five parts in Quotation:

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

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

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

The screenshot displays the 'Quotation' 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 window has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active, showing 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 'Extra Blank Line'. To the right of the table are checkboxes for 'Sub-Total', 'Discount', 'Total', 'Tax', 'Tax 2', 'Shipping', and 'Overall Total', each with a corresponding yellow-highlighted value field. Below these are 'Notes' and 'Signature' sections. The 'Notes' section has a text area and a 'Load from Note St...' button. The 'Signature' section has two boxes, 'L.H.S. Signature Box' and 'R.H.S. Signature Box', each with 'Add' and 'Remove' buttons and a date field.

ID	Description	Unit	Unit Price	Qty	Total

Sub-Total: 0.00
Discount: 0.00
Total: 0.00
Tax: 0.00
Tax 2: 0.00
Shipping: 0.00
Overall Total: 0.00

Notes: Use words, <u>words</u>, <i>words</i> to bold, underline and italic

L.H.S. Signature Box: Add "Company Chop" i..., Add "Signature" image, Remove, Date (YYYY-MM-DD)

R.H.S. Signature Box: Add "Company Chop" i..., Add "Signature" image, Remove, Date (YYYY-MM-DD)

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

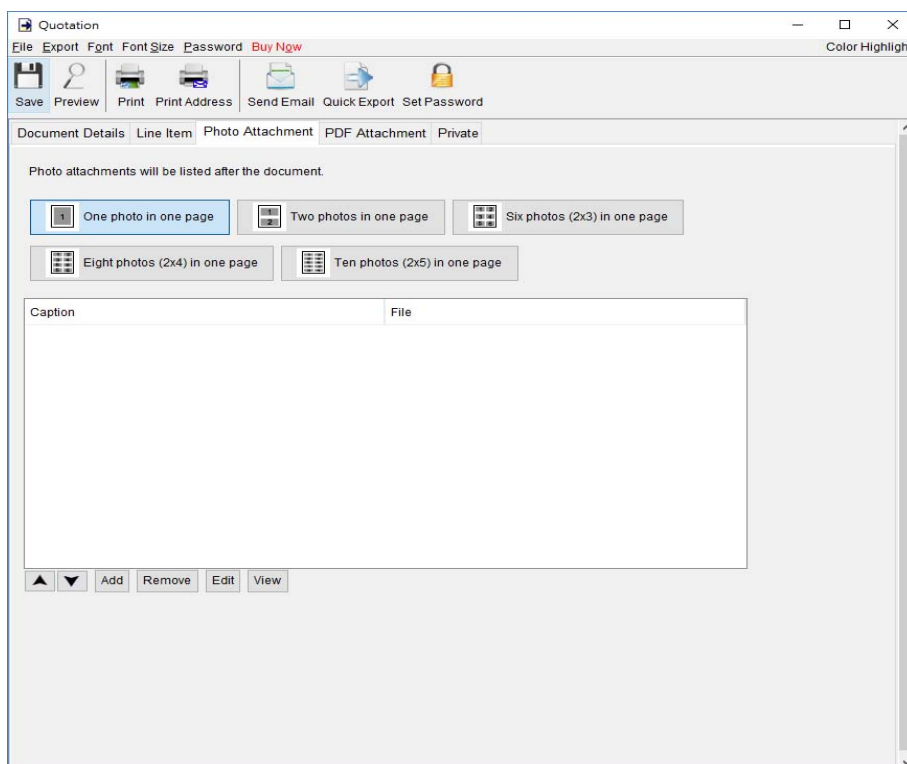
User can input up to 40 lines information in the "Notes". It supports , <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

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

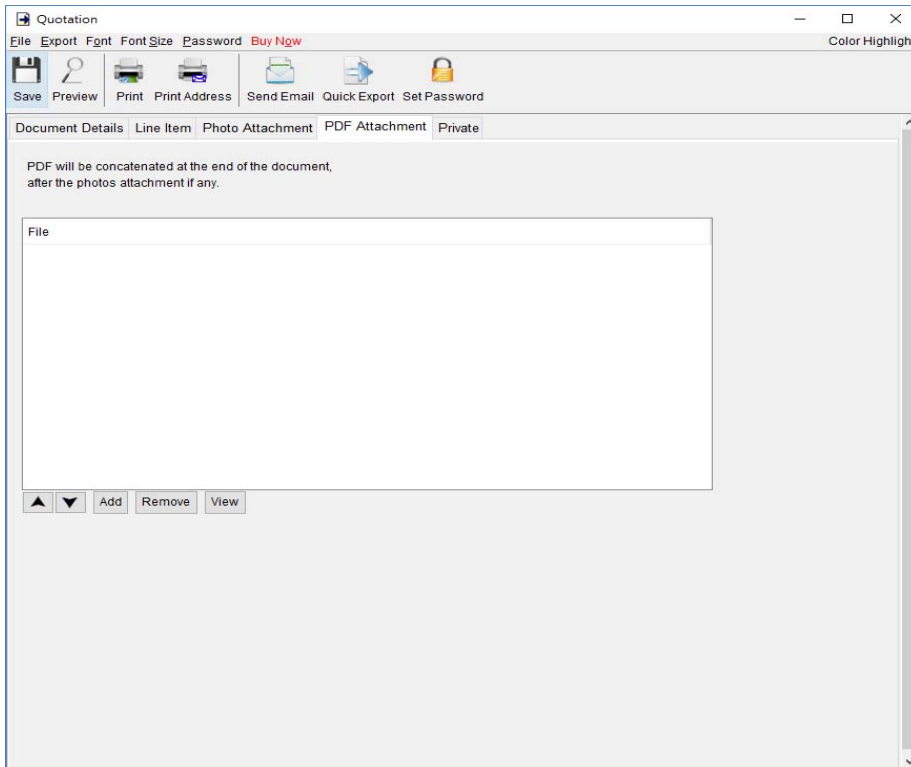
Photo Attachment – Photos can be attached to the end of quotation. Five layouts are provided to list the photos:

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

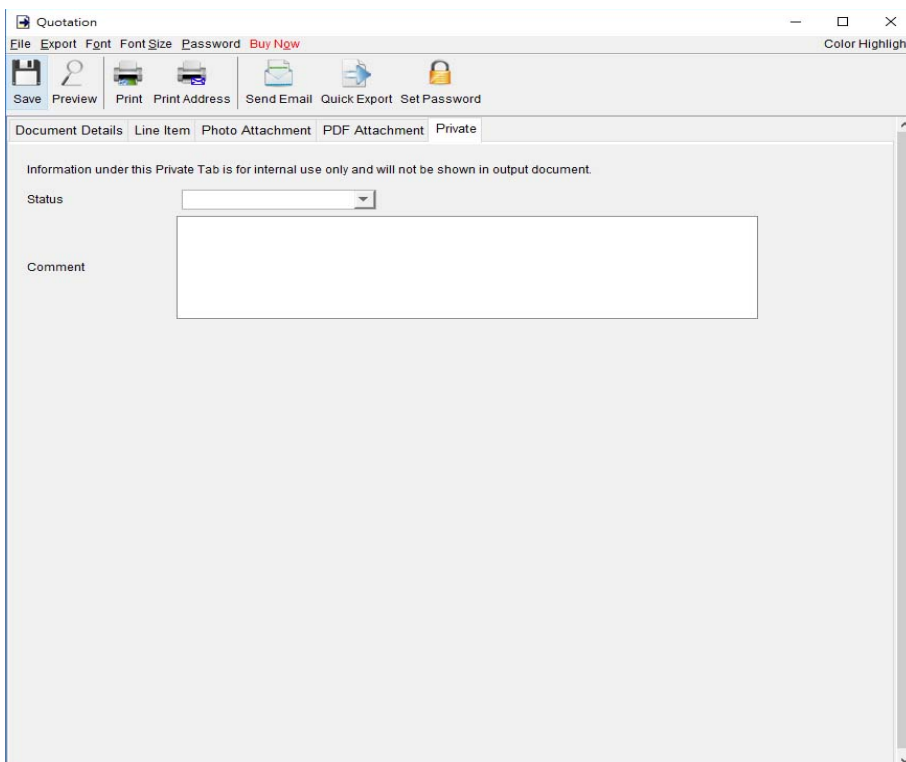
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



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



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



4.2. Proforma Invoice

The screenshot shows the 'Proforma Invoice' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below it is a button bar with '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 'Document Details' tab is selected, showing a 'Generate from Quotation' button and a 'Stamp' dropdown. Below these are input fields for 'Proforma Invoice No.' (10000), 'Currency' (United States Dollar, \$), 'Date' (2017-12-29), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. The 'Customer Information' section at the bottom has 'Bill To' and 'Ship To' address fields, 'Tel' checkboxes, and 'Load from Customer List' and 'Add to Customer List' buttons.

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

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

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

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

Font Size – Specify the font size.

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

Proforma Invoice Details

There are five parts in Proforma Invoice:

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

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

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

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

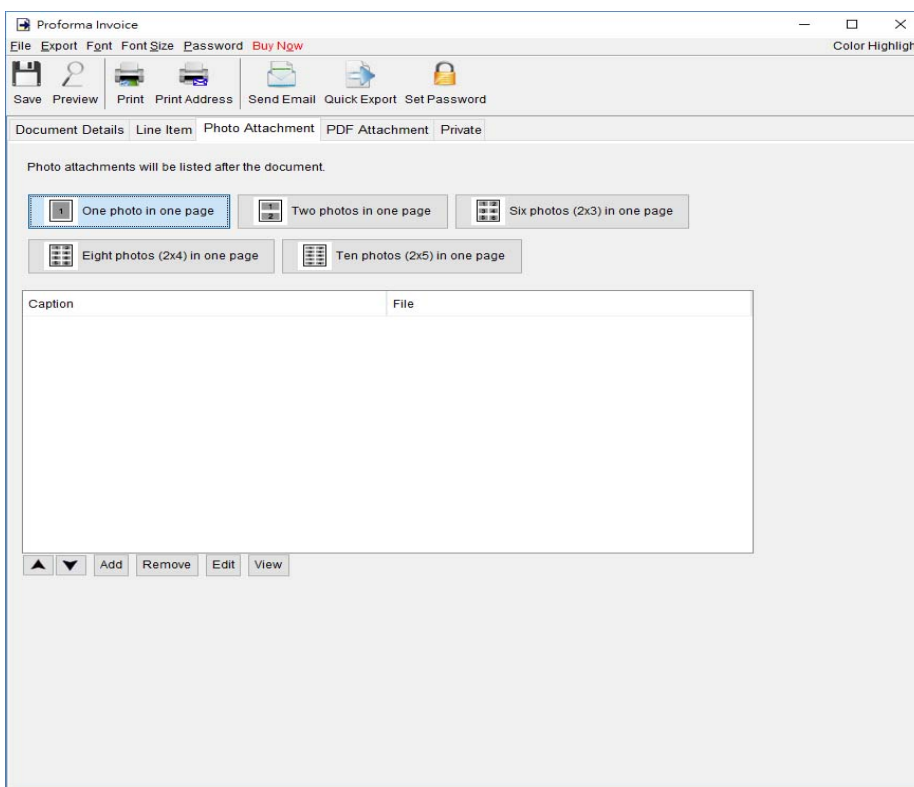
User can input up to 40 lines information in the "Notes". It supports , <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

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

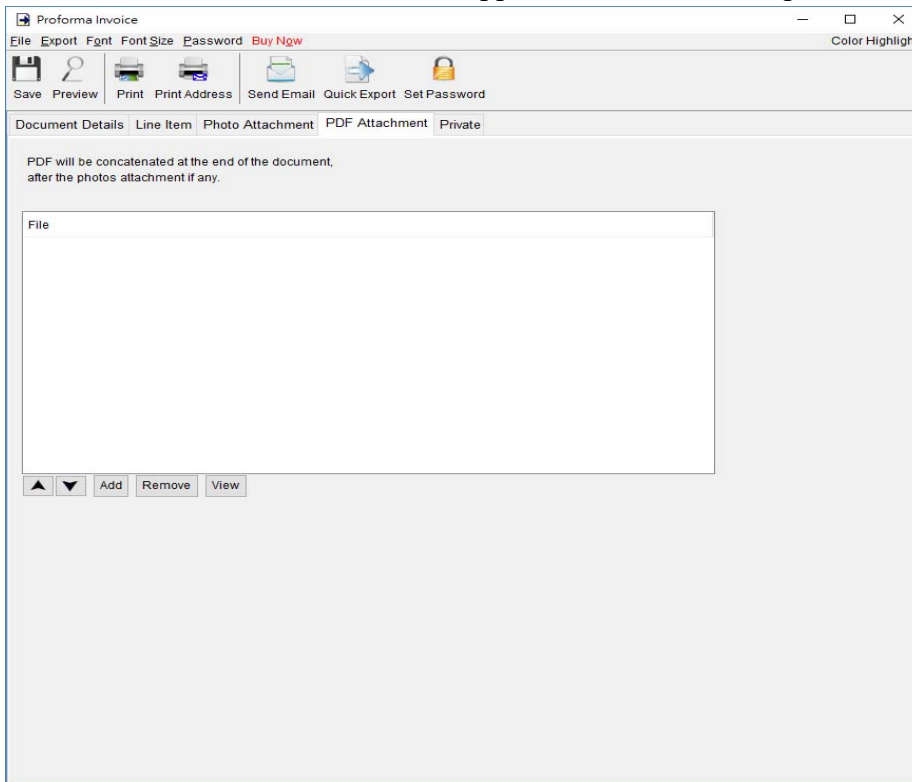
Photo Attachment – Photos can be attached to the end of Proforma Invoice. Five layouts are provided to list the photos:

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

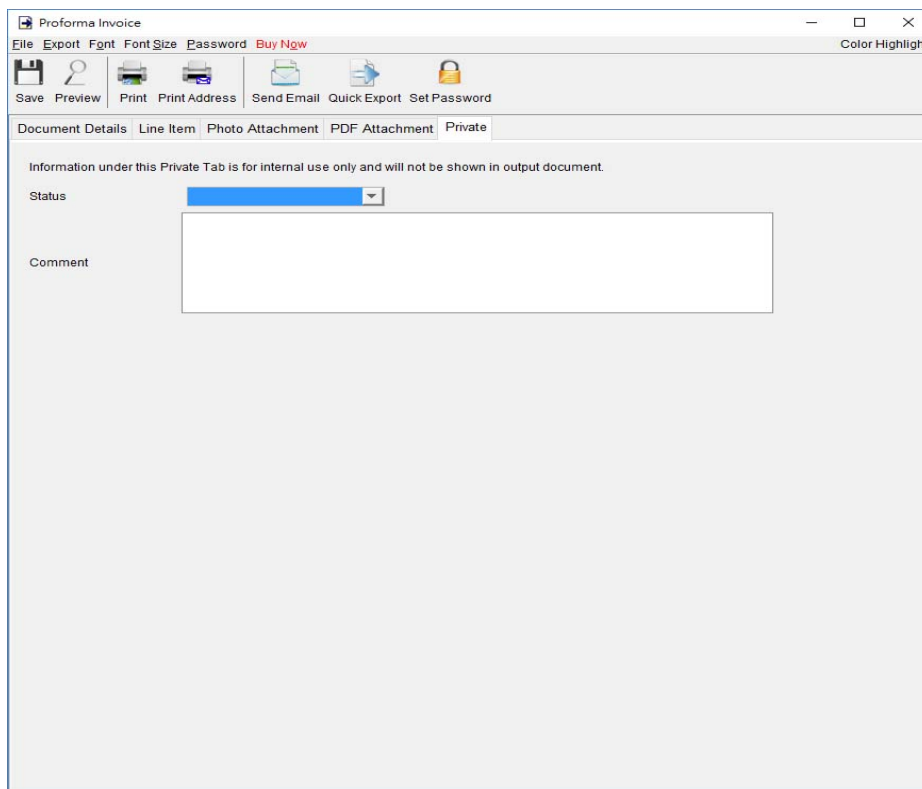
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



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



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



4.3. Invoice

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

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

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

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

Font Size – Specify the font size.

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

Invoice Details

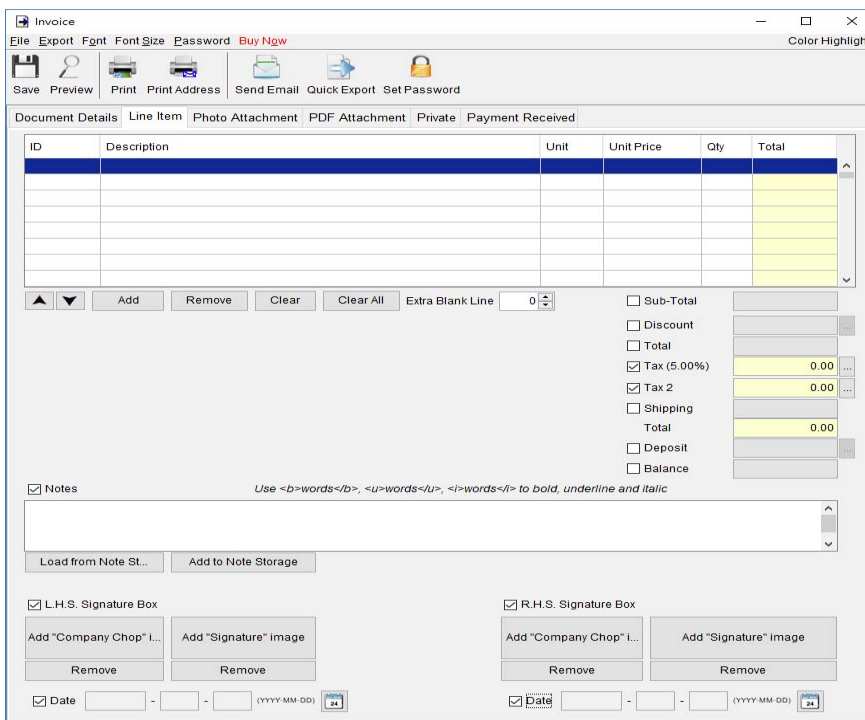
There are six parts in Invoice:

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

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

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

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



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

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

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

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

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

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

Invoice

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 Payment Received

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

Caption File

▲ ▼ Add Remove Edit View

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 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 a tabbed interface with 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment' (selected), 'Private', and 'Payment Received'. A text box contains the instruction: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular area for file selection. At the bottom left of this area are four buttons: 'Add', 'Remove', 'View', and a small icon.

Private – User can specify document status and type comments under private tab. Information under private tab will not 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 content area has the same tabbed interface, but the 'Private' tab is selected. A text box at the top of the main area states: '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 empty text area.

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

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

The screenshot shows the 'Payment Received' tab of 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 'Payment Received' tab is selected, showing a 'Record payment for Invoice' section with a 'Preview' button and a 'Print' button. Below this is a table with columns: 'Date', 'Payment Method', 'Reference Number', 'Description', and 'Amount Received'. The table is currently empty. Below the table are 'Add', 'Remove', and 'Edit' buttons. At the bottom, there is a summary section with the following values:

Invoice Total	0.00
Deposit	
Balance	
Total Payment Received	0.00
Outstanding Balance	0.00

4.4. Tax Invoice

The screenshot shows the 'Tax Invoice' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu bar is a button bar with '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', 'Private', and 'Payment Received'. The 'Document Details' tab is active, showing a form with fields for 'Invoice No.' (10000), 'Stamp', 'Currency' (United States Dollar, \$), 'Date' (2017-12-29), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. There are also checkboxes for 'Tel' and buttons for 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Tax Invoice Details

There are six parts in Tax Invoice:

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

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

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

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

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

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

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

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

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

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

Tax Invoice

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 Payment Received

Photo attachments will be listed after the document.

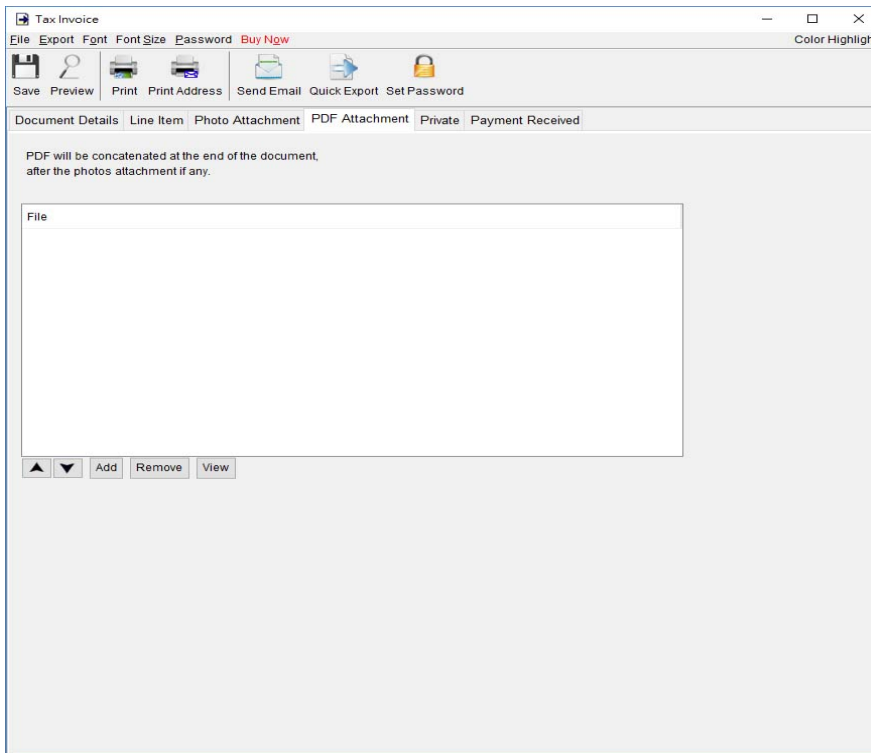
One photo in one page Two photos in one page Six photos (2x3) in one page

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

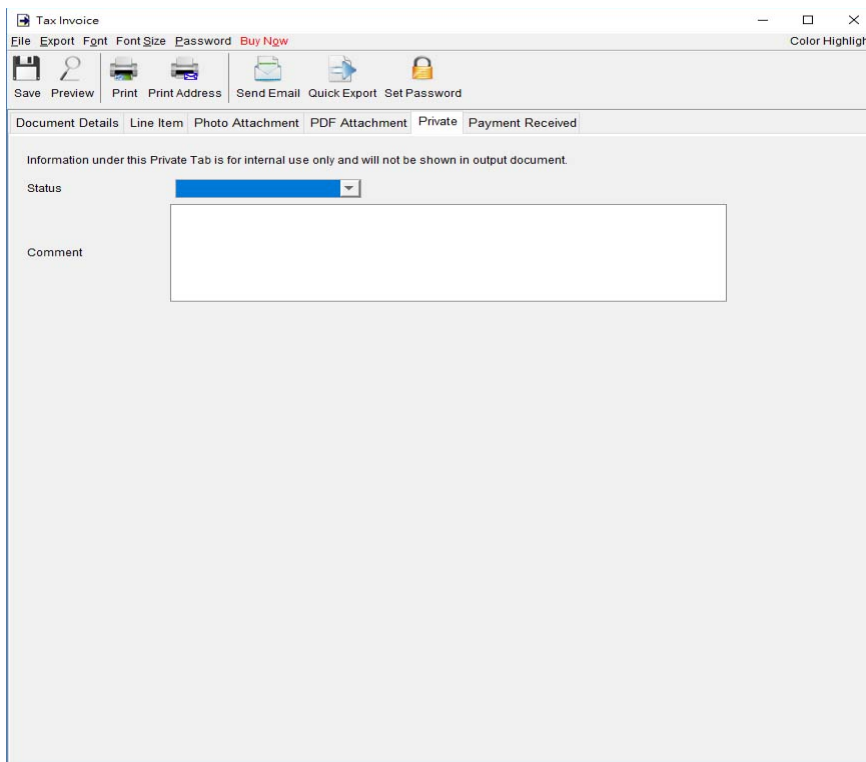
Caption File

▲ ▼ Add Remove Edit View

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



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



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

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

Tax 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 Payment Received

Record payment for Invoice Preview Print

Date	Payment Method	Reference Number	Description	Amount Received
------	----------------	------------------	-------------	-----------------

Add Remove Edit

Invoice Total 0.00

Deposit 0.00

Balance 0.00

Total Payment Received 0.00

Outstanding Balance 0.00

4.5. Receipt

The screenshot shows the 'Receipt' window in the EasyBilling application. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu bar is a button bar 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', and 'Private'. The 'Document Details' tab is active, showing a form with fields for 'Receipt No.' (10000), 'Stamp', 'Currency' (United States Dollar, \$), and 'Date' (2017-12-29). There is a checkbox for 'Hide empty fields in output' and a button to 'Generate from Quotation, Proforma Invoice, Invoice or Tax Invoice'. Below these is a section for 'Payer Information' with fields for 'Payer', 'Address', and 'Tel'. At the bottom right of the form are buttons for 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Receipt Details

There are five parts in Receipt:

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

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

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

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

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

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

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

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

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

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

Receipt

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.

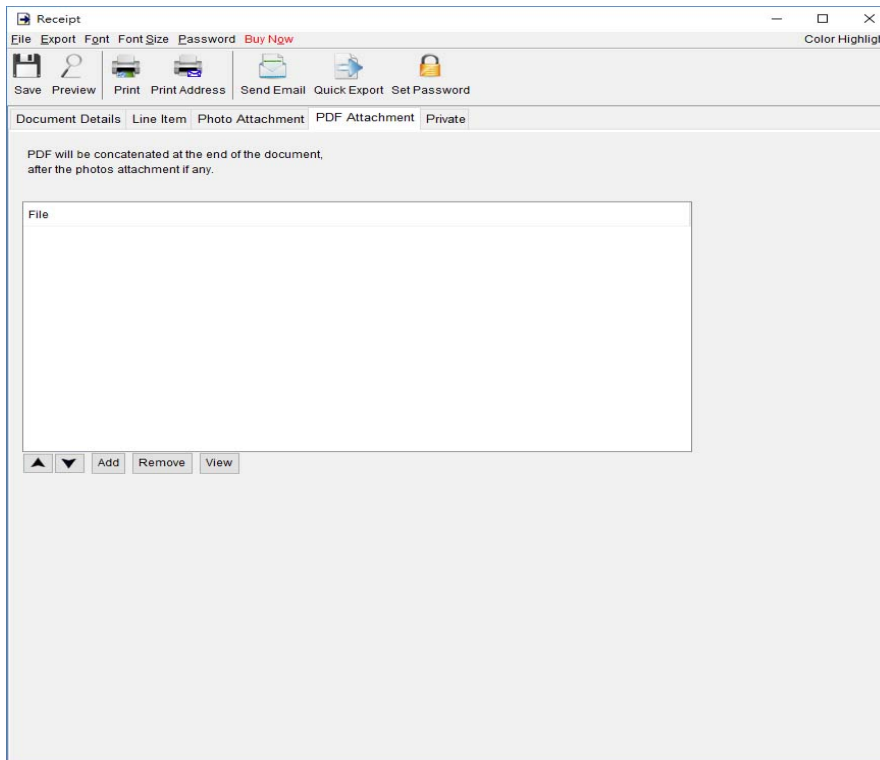
One photo in one page Two photos in one page Six photos (2x3) in one page

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

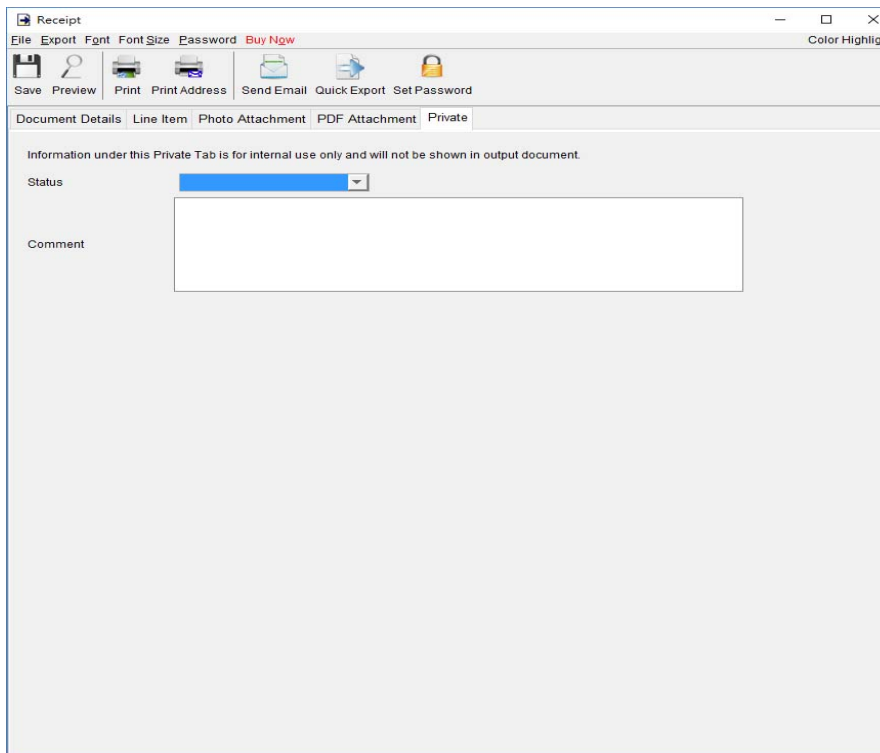
Caption File

▲ ▼ Add Remove Edit View

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



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



4.6. Purchase Order

The screenshot shows the 'Purchase Order' window in EasyBilling. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar contains 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Document Details' tab is selected, displaying various input fields: 'Purchase Order No.' (10000), 'Currency' (United States Dollar, \$), 'Purchase Order Date' (2017-12-29), 'Suppliers Reference', 'Delivery Req'd By', 'Shipping Term', and 'Payment Term'. There are also sections for 'Supplier Information' and 'Ship To' with address fields and 'Tel' checkboxes. Buttons for 'Load from Supplier List', 'Add to Supplier List', and 'Load Company Address' are at the bottom. A 'Generate from Quotation, Proforma Invoice, Invoice or Tax Invoice' button is located at the top of the form area.

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

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

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

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

Font Size – Specify the font size.

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

Purchase Order Details

There are five parts in Purchase Order:

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

Document Details – User can specify the header information, includes Number, Currency, Date, Payment/Shipping Term, Delivery Req'd By, Suppliers Reference and Supplier Information. Supplier Information can be typed in directly or load from the Supplier List. User can add a stamp on to the document by select the stamp text, like Confidential, Revised, Draft, etc.

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

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

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

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

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

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

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

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

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.

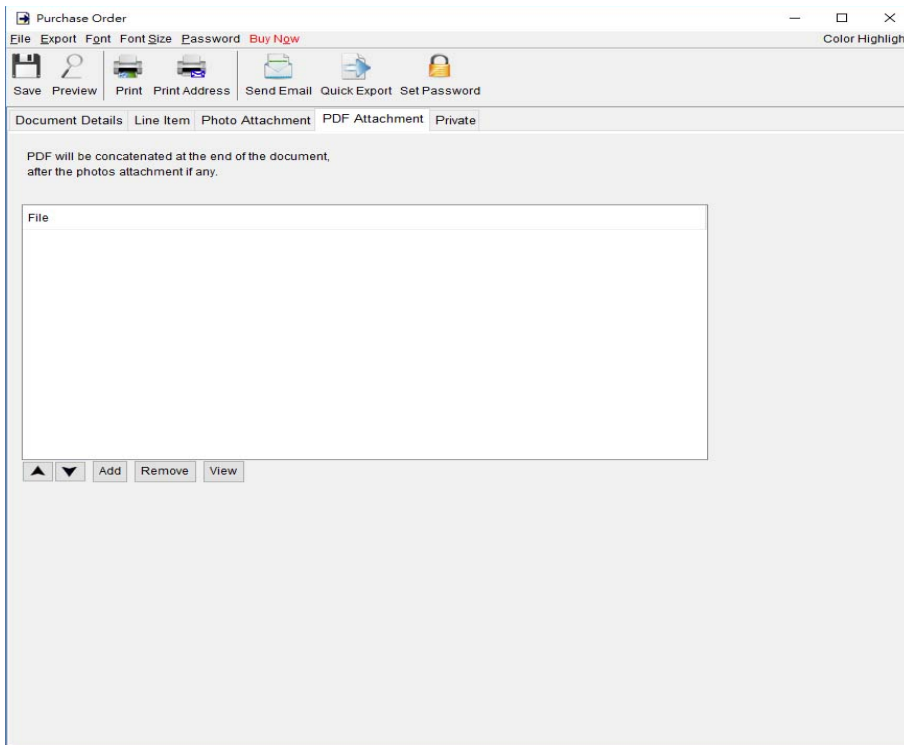
One photo in one page Two photos in one page Six photos (2x3) in one page

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

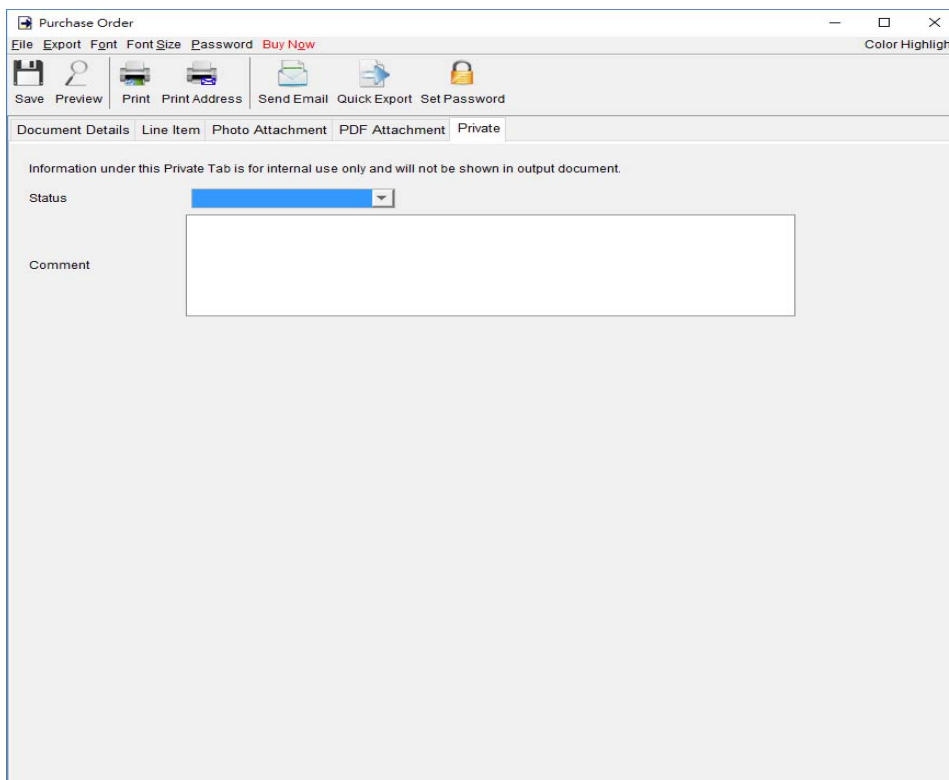
Caption File

▲ ▼ Add Remove Edit View

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



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



4.7. Delivery Note

The screenshot shows the 'Delivery Note' window in the EasyBilling application. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu bar is a button bar 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', and 'Private'. The 'Document Details' tab is active, showing a form with fields for 'Delivery Note No.' (10000), 'Stamp' (APPROVED), 'Date' (2017-12-29), 'Invoice No.', 'Delivery Date/Time', 'Delivery Term', and 'Notes'. There is a checkbox for 'Hide empty fields in output' and a button to 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice or Receipt'. At the bottom, there is a 'Customer Information' section with fields for 'Delivery To' and 'Address', a checkbox for 'Tel', and buttons for 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Delivery Note Details

There are five parts in Delivery Note:

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

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

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

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

Delivery Note

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

ID	Description	Unit	Qty

▲ ▼ Add Remove Clear Clear All Extra Blank Line 0

☒ L.H.S. Signature Box ☒ R.H.S. Signature Box

Add "Company Chop" i... Add "Signature" image Remove Remove

☒ Date - - (YYYY-MM-DD)

☒ Date - - (YYYY-MM-DD)

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

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

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

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

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

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 interface includes a 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, PDF Attachment, and Private. The main area contains a text box with the instruction: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular box labeled 'File' 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 shown in the output.

The screenshot shows the 'Delivery Note' application window with the 'Private' tab selected. The interface is consistent with the previous screenshot. The main area contains 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, there is a 'Status' label followed by a dropdown menu currently showing 'OPEN'. Below the status dropdown is a 'Comment' label followed by a large empty rectangular text area for entering comments.

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 and a menu bar with options: File, Export, Font, Font Size, Password, and Buy Ngw. Below the menu bar is a toolbar with 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 the 'Document Details' tab, there is a checkbox for 'Hide empty fields in output' and a button for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice or Receipt'. The form contains several input fields: 'Packing Slip No.' (with value 10000), 'Stamp' (with a dropdown and a green plus icon), 'Date' (with a date picker showing 2017-12-29), 'Invoice No.', 'Order Number', and 'Shipping Term' (with a dropdown and a green plus icon). There is a section for 'Customer Information' with a 'Ship To' label and a multi-line 'Address' field. A checkbox for 'Tel' is also present. At the bottom right, there are two buttons: 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Packing Slip Details

There are five parts in Packing Slip:

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

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

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

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

ID	Description	Unit	Order Quantity	Ship Quantity

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

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

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

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

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

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

Caption File

▲ ▼ Add Remove Edit View

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

The screenshot shows the 'PDF Attachment' tab in the 'Packing Slip' window. 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 selected, showing a text area for a file path and buttons for 'Add', 'Remove', and 'View'. A note at the top states: 'PDF will be concatenated at the end of the document, after the photos attachment if any.'

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

The screenshot shows the 'Private' tab in the 'Packing Slip' window. The window has the same menu bar and toolbar as the previous screenshot. The 'Private' tab is selected, showing a 'Status' dropdown menu with 'OPEN' selected and a 'Comment' text area. A note at the top states: 'Information under this Private Tab is for internal use only and will not be shown in output document.'

4.9. Ordering

The screenshot shows the 'Ordering' window in EasyBilling. The window has a title bar with standard window controls. 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 a 'Hide empty fields in output' checkbox and a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice or Receipt' button. The form fields include 'Ordering No.' (10000), 'Date' (2017-12-29), 'Invoice No.', 'Delivery Date/Time', 'Delivery Term', and 'Notes'. The 'Customer Information' section at the bottom has 'Delivery To' and 'Address' fields, and 'Load from Customer List' and 'Add to Customer List' buttons.

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

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

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

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

Font Size – Specify the font size.

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

Ordering Details

There are five parts in Ordering:

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

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

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

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

ID	Description	Qty	Date Ord...	Date Rec...

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

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

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

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

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.

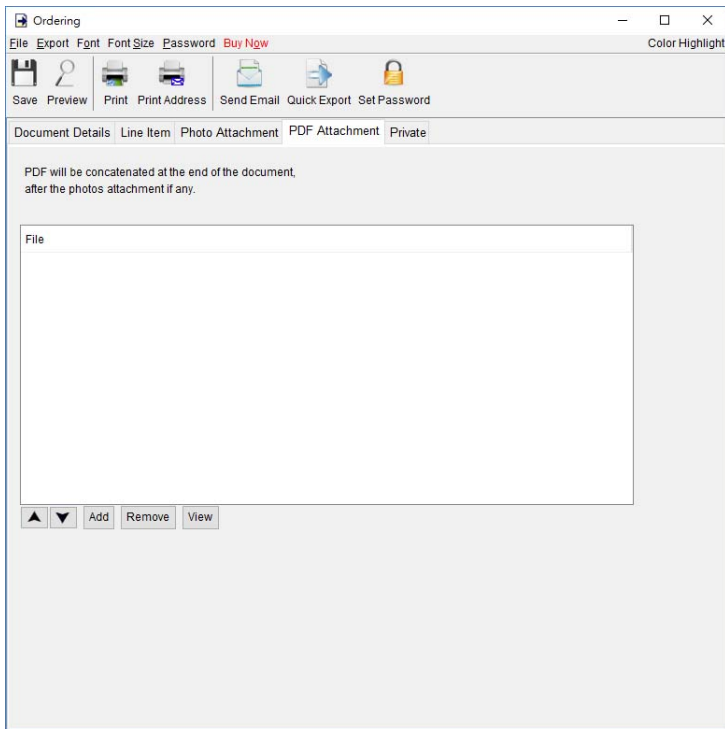
One photo in one page Two photos in one page Six photos (2x3) in one page

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

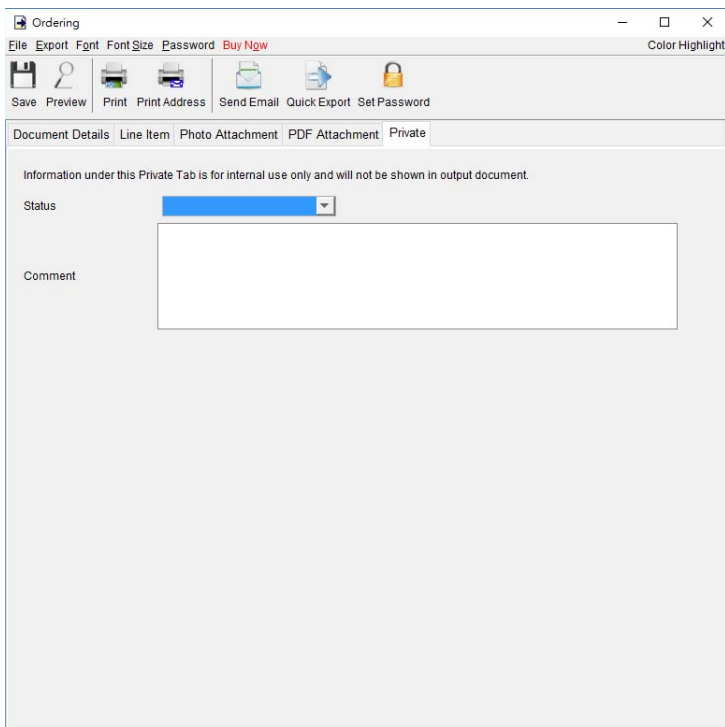
Caption File

▲ ▼ Add Remove Edit View

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



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



4.10. Packing List

The screenshot shows the 'Packing List' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu bar is a button bar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is titled 'Document Details' and contains several tabs: 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active. It features a 'Generate from Invoice, or Tax Invoice' button. Below this are input fields for 'Packing List No.' (with value '10000'), 'Stamp', 'Date' (with a date picker set to 2017-12-29), 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman'. A 'Customer Information' section at the bottom has a 'Ship To' label, an 'Address' label, and a multi-line text input area. There are checkboxes for 'Tel' and 'Fax'. At the bottom right of the form are buttons for 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Packing List Details

There are five parts in Packing List:

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

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

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

Page 48

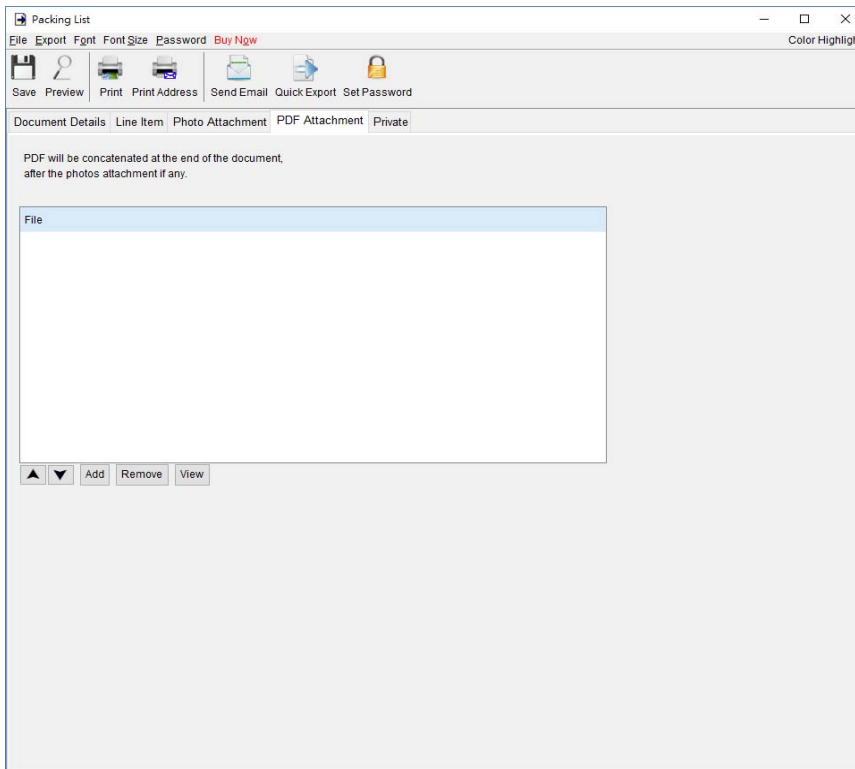
Photo Attachment – Photos can be attached to the end of Packing List. Five layouts are provided to list the photos:

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

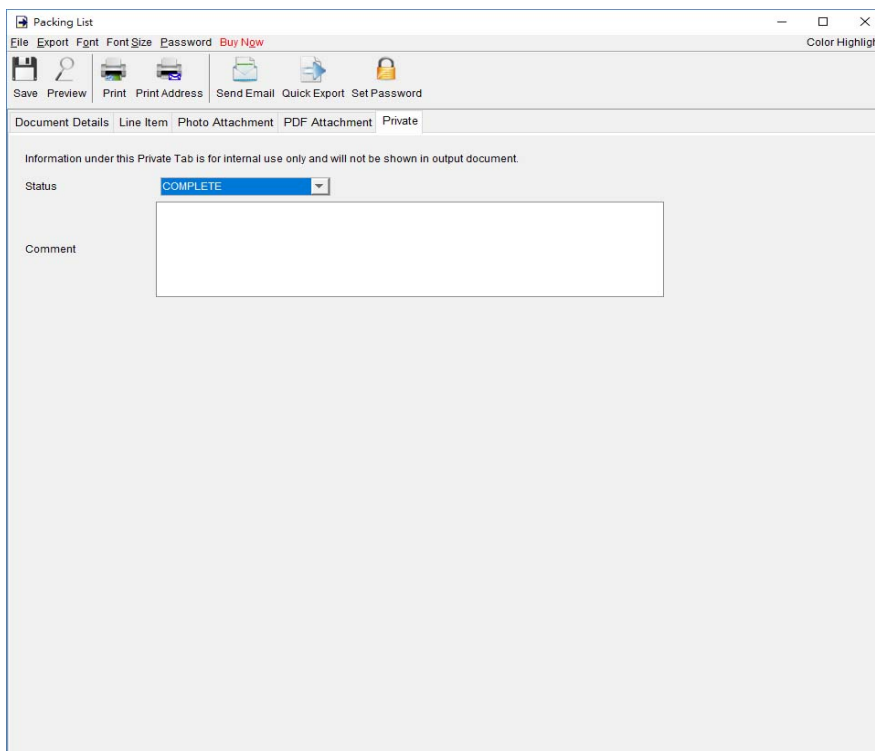
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.

The screenshot shows the 'Packing List' application window. The title bar reads 'Packing List'. 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 list of photo layouts: 'One photo in one page', 'Two photos in one page', 'Six photos (2x3) in one page', 'Eight photos (2x4) in one page', and 'Ten photos (2x5) in one page'. Below these is a large text area for 'Caption' and 'File'. At the bottom, there are buttons for 'Add', 'Remove', 'Edit', and 'View'.

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



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



4.11. Weight List

Weight List

File Export Font Font Size Password Buy Now Color Highlight

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

Generate from Invoice, or Tax Invoice

Weight List No. 10000 Stamp

Date 01 - 02 - 2021 (DD-MM-YYYY)

Invoice No.

Ref No.

P.O. Number

Salesman

Customer Information

Ship To

Address

☐ Tel

☐ VAT No

Load from Customer List Add to Customer List Clear

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

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

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

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

Font Size – Specify the font size.

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

Weight List Details

There are five parts in Credit Note:

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

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

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

The screenshot shows the 'Weight List' application window. The 'Document Details' tab is active, displaying a table with 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', and 'Clear All', along with an 'Extra Blank Line' dropdown. There are also checkboxes for 'Total Quantity', 'Total Net Weight', and 'Total Weight', each with a corresponding yellow input field. A 'Notes' section with a text area and a 'Load from Note St...' button is present. At the bottom, there are two signature boxes (L.H.S. and R.H.S.) with 'Add' and 'Remove' buttons, and date input fields.

ID	Description	QTY	Weight	Total Weight

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

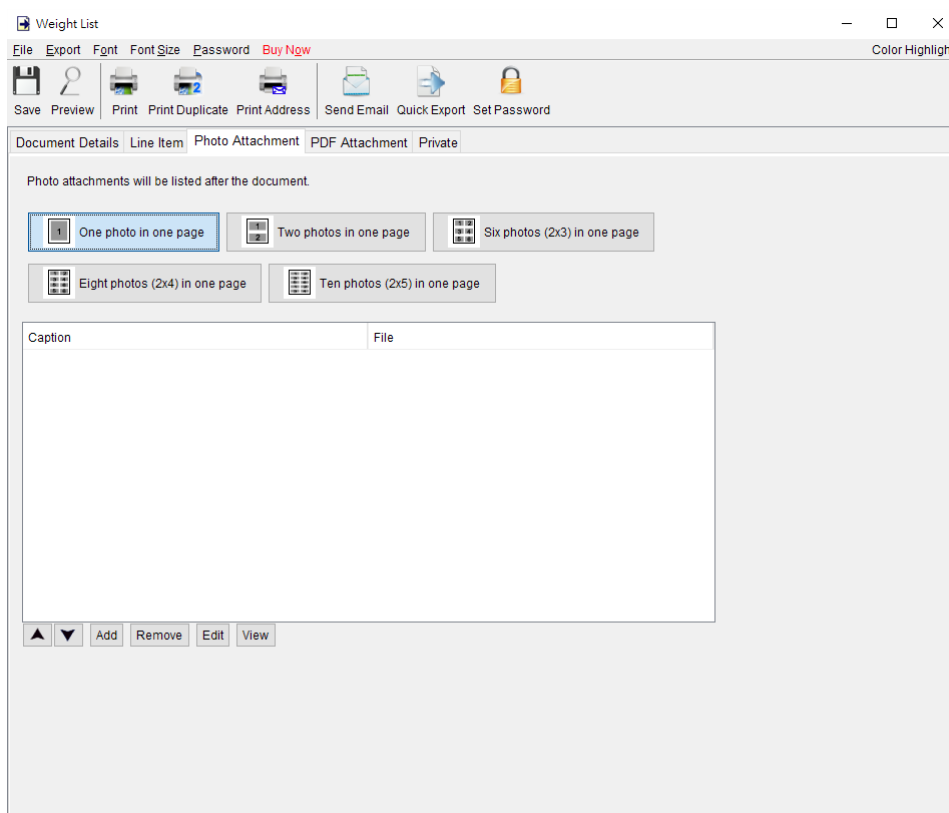
User can input up to 40 lines information in the "Notes". It supports , <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

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

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

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

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



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

The screenshot shows the 'Weight List' application window. The 'PDF Attachment' tab is 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 Duplicate, 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 the text: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this text is a large empty rectangular box for file selection. At the bottom of this box 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 shown in the output.

The screenshot shows the 'Weight List' application window with the 'Private' tab selected. The interface is similar to the previous screenshot, but the main area contains 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

The screenshot shows the 'Credit Note' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu bar is a button bar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is titled 'Document Details' and contains several sections: a checkbox for 'Hide empty fields in output', a button for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice or Receipt', a 'Credit Note No.' field with the value '10000', a 'Stamp' dropdown menu, a 'Currency' dropdown menu set to 'United States Dollar, \$', and a 'Date' field set to '2017 - 12 - 29'. Below these is a 'Customer Information' section with fields for 'To', 'Address', and 'Tel'. At the bottom right of the 'Customer Information' section are two buttons: 'Load from Customer List' and 'Add to Customer List'.

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

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

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

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

Font Size – Specify the font size.

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

Credit Note Details

There are five parts in Credit Note:

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

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

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

Credit Note

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

ID	Description	Unit	Unit Price	Qty	Total

▲ ▼

Add

Remove

Clear

Clear All

Extra Blank Line

0

Total

0.00

☒ Notes
 Use words, <u>words</u>, <i>words</i> to bold, underline and italic

Load from Note S...

Add to Note Storage

☐ L.H.S. Signature Box

Add "Company Chop"...

Remove

Add "Signature" image

Remove

☐ R.H.S. Signature Box

Add "Company Chop" im...

Remove

Add "Signature" image

Remove

☐ Date

-

-

(YYYY-MM-DD)

☐ Date

-

-

(YYYY-MM-DD)

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

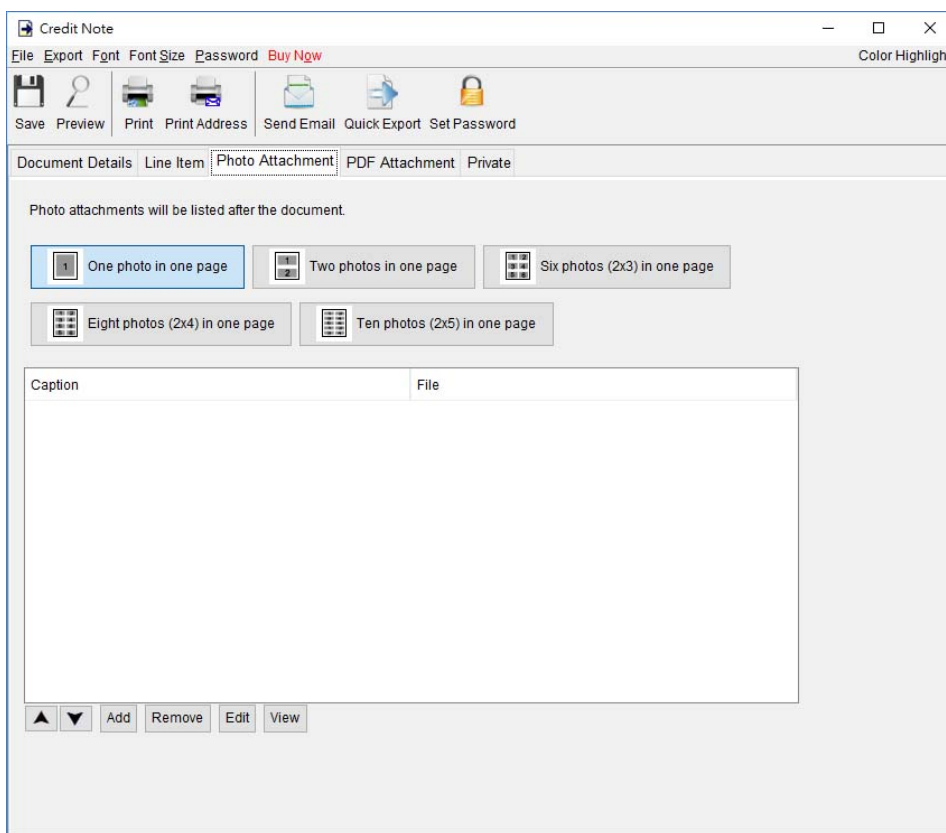
User can input up to 40 lines information in the "Notes". It supports , <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

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

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

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

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



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

The screenshot shows the 'Credit Note' application window. The 'PDF Attachment' tab is 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 area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'PDF Attachment' tab contains a text box with the instruction: 'PDF will be concatenated at the end of the document, after the photos attachment if any.' Below this is a large empty rectangular area for file selection. 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 shown in the output.

The screenshot shows the 'Credit Note' application window with the 'Private' tab selected. The interface is similar to the previous screenshot. The 'Private' tab contains 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 is a 'Status' label followed by a dropdown menu. Below the dropdown is a 'Comment' label followed by a large empty rectangular text area.

4.13. Debit Note

Debit 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 or Receipt

Debit Note No. 10000 Stamp

Currency United States Dollar, \$

Date 2017 - 12 - 29 (YYYY-MM-DD)

Customer Information

To

Address

☒ Tel

Load from Customer List Add to Customer List

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

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

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

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

Font Size – Specify the font size.

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

Debit Note Details

There are five parts in Debit Note:

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

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

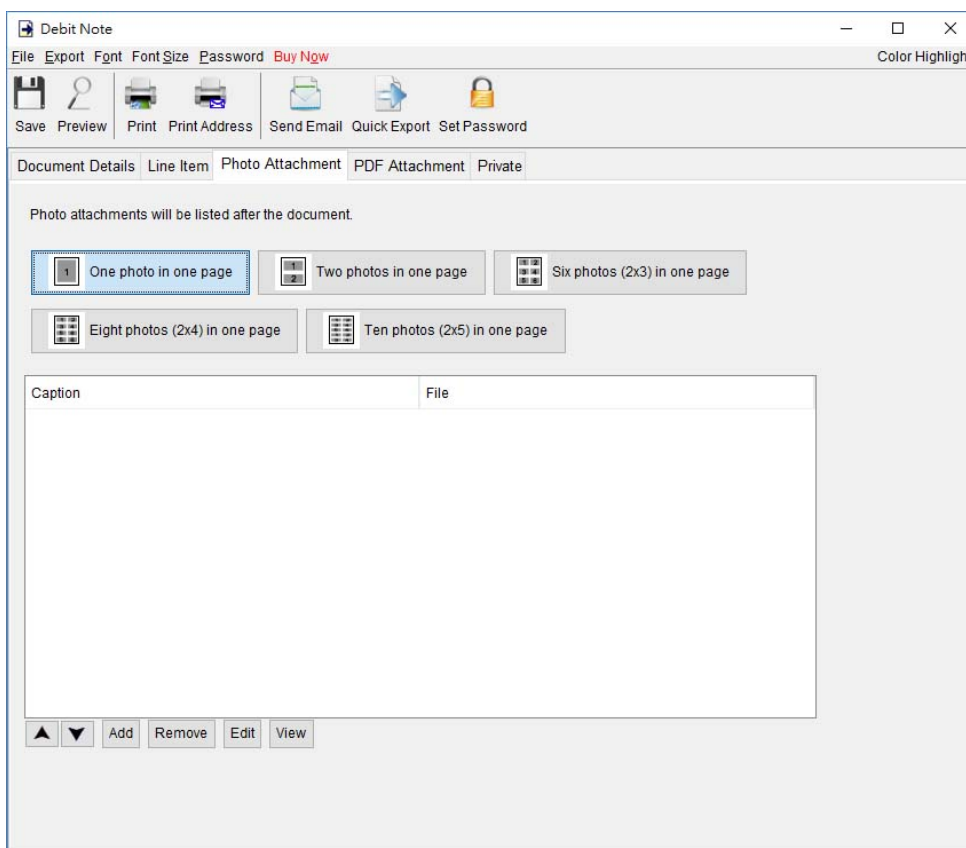
User can input up to 40 lines information in the "Notes". It supports , <u>, <i> for bold, underline and italic style formatting. Uncheck the box to hide the "Note" field in output.

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

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

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



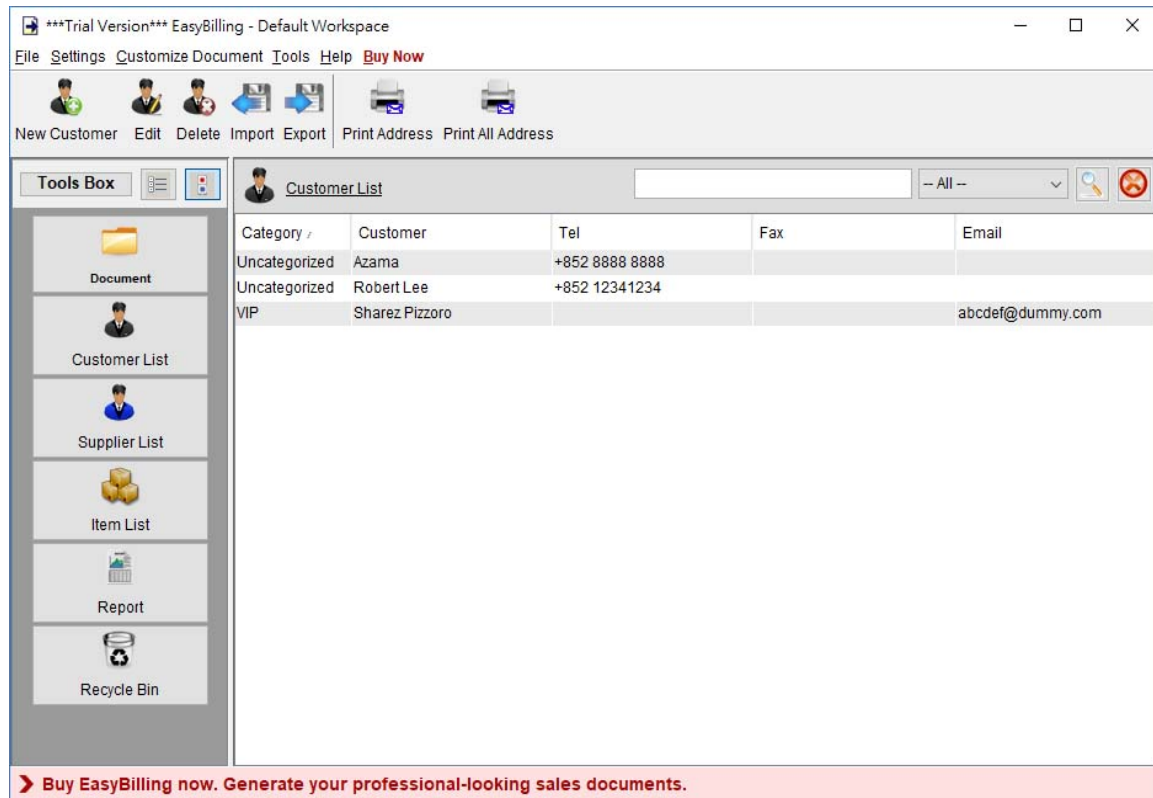
PDF Attachment – PDF file can be appended to the PDF output of document.

The screenshot shows the 'Debit Note' application window. The 'PDF Attachment' tab is 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 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 for file selection. 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 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 main area contains 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 followed by a dropdown menu showing 'OPEN'. To the left of a large text input area is a 'Comment' label.

5. CUSTOMER LIST



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

Tool Bar

New – Add a new customer.

Edit – Edit the selected customer.

Delete – Delete the selected customer.

Import – Import customer from a XLS file.

Export – Export customer list into PDF, XLS or HTML

Print Address – Print address on label

Print All Address – Print address of all customers on label

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

Below is the customer edit window.

Customer

Category :
Uncategorized

Customer :

Tel :

Fax :

Email :

Preferred Shipping Term :

Preferred Payment Term :

Sales Discount % :
0.00

Bill To Information

Bill To :
Billing Address :

Tel :
Vat No :

Ship To Information

Ship To :
Shipping Address :

Address #1

Address #2

Address #3

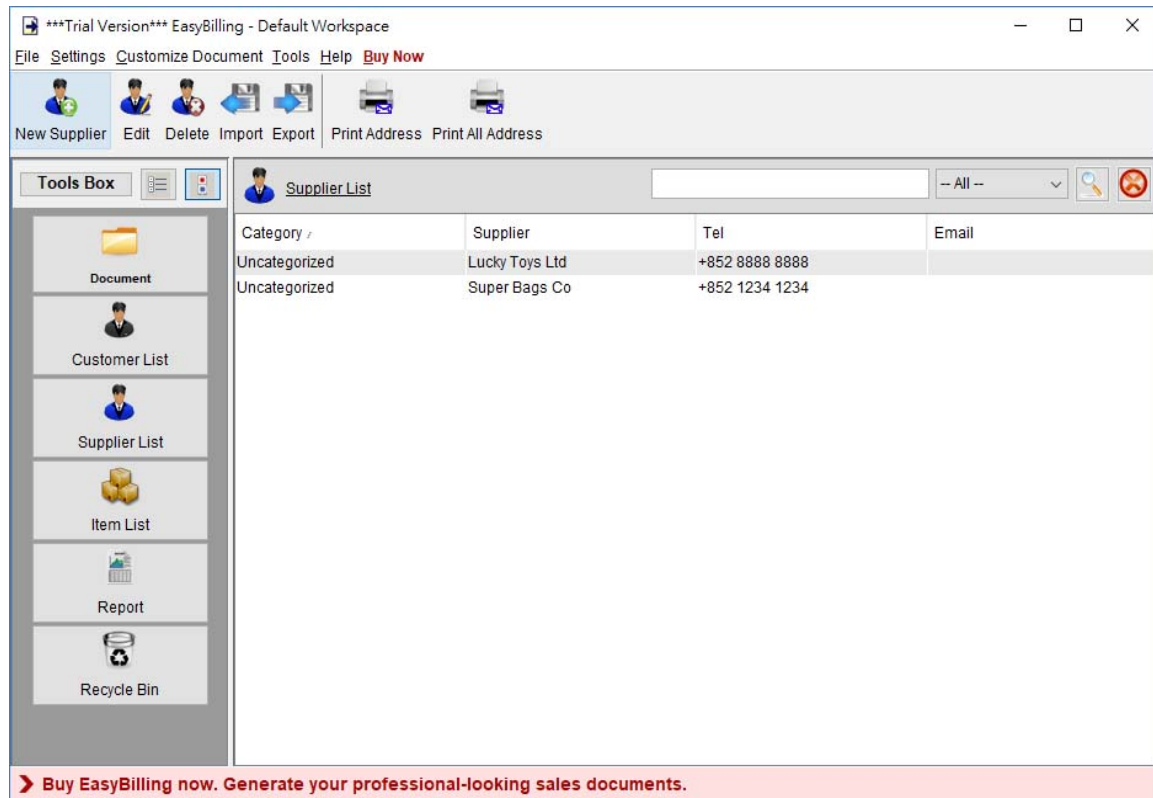
Tel :
Vat No :

Save

Cancel

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6. SUPPLIER LIST



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

Tool Bar

New – Add a new supplier.

Edit – Edit the selected supplier.

Delete – Delete the selected supplier.

Import – Import customer from a XLS file.


Export – Export customer list into PDF, XLS or HTML

Print Address – Print address on label

Print All Address – Print address of all suppliers on label

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

Below is the supplier edit window.

 Supplier


Category :
Supplier :
Tel :
Fax :
Email :
Preferred Payment Term :


Uncategorized

Supplier Information

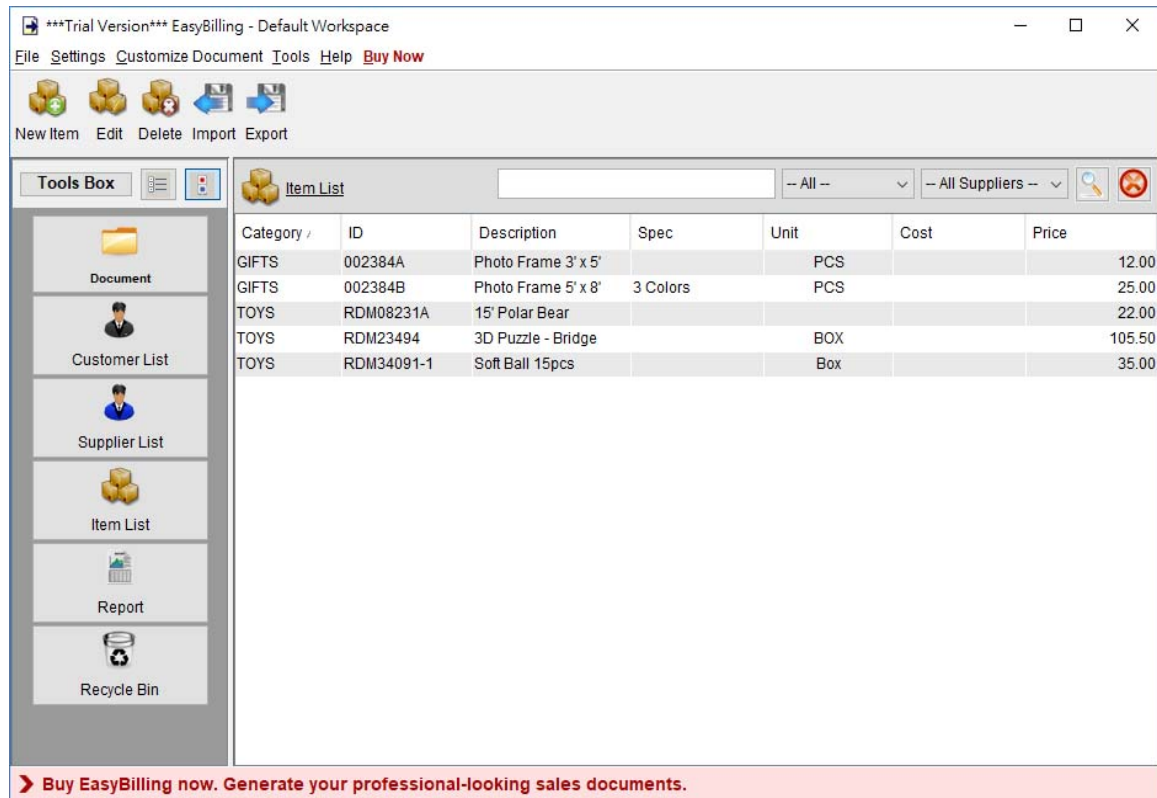
Supplier Name :
Address :

Tel :
Vat No :

 Save

 Cancel

7. ITEM LIST



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

Tool Bar

New – Add a new item.

Edit – Edit the selected item.


Delete – Delete the selected item.

Import – Import item from a XLS file.

Export – Export item list into PDF, XLS or HTML

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

Below is the Item edit window.

 Item ✕

Category :

Uncategorized ▾

Supplier :

▾

ID :

Description :

Spec :

Dimensions :

Length :

Width :

Height :

Net Weight :

Gross Weight :

Unit :

Cost :

Price :

Discount % :

0.0

Additional Info 1 :

Additional Info 2 :

Additional Info 3 :

Taxable :


☐ Yes ☒ No


Photo

Click to select photo

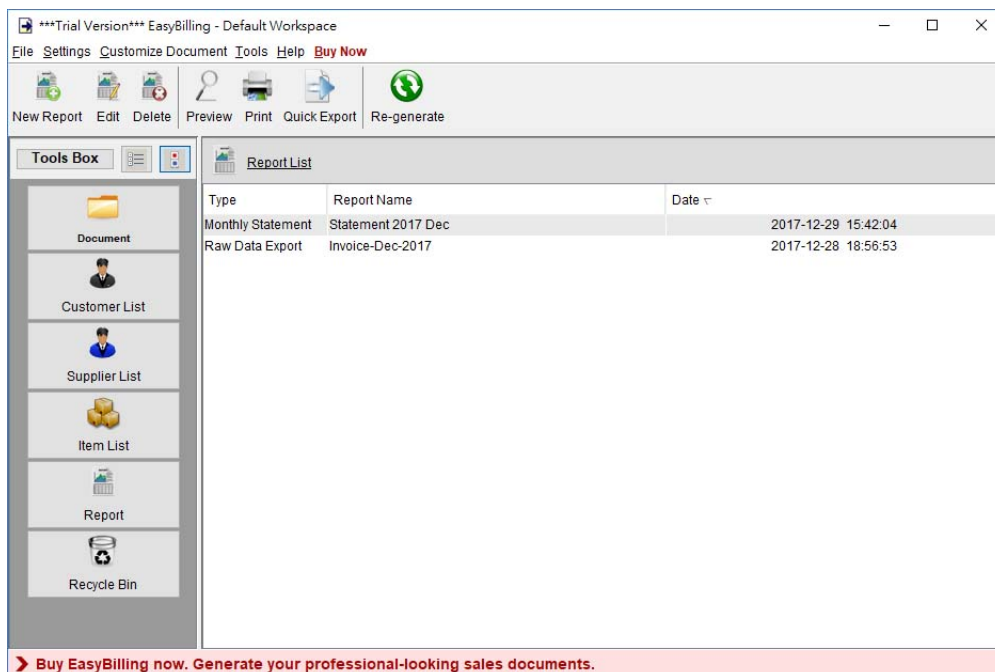
Remove Photo

* Dimensions and Weight information are used in Packing List and Weight List

 Save

 Cancel

8. REPORT



The user interface of managing Report is shown above.

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

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

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

Edit – Edit selected report.

Delete – Delete selected report.

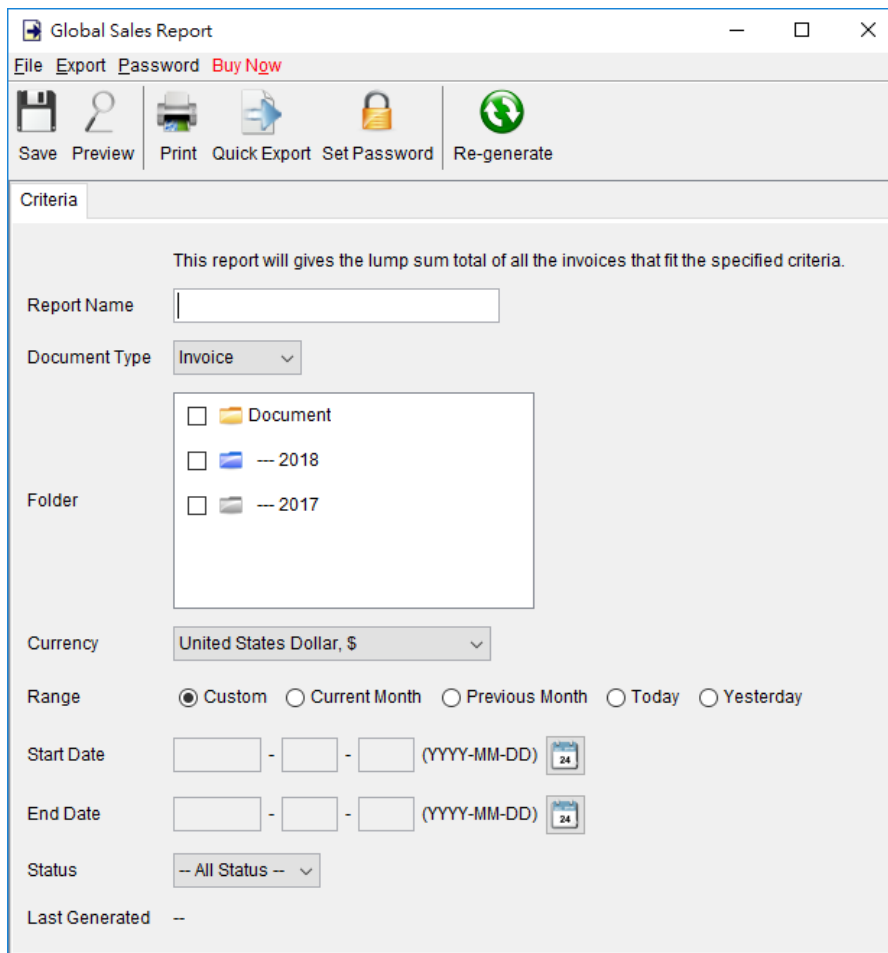
Preview – Preview selected report in PDF format.

Print – Print selected report.

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

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

8.1. Global Sales Report



Global Sales Report

File Export Password Buy Now

Save Preview Print Quick Export Set Password Re-generate

Criteria

This report will gives the lump sum total of all the invoices that fit the specified criteria.

Report Name

Document Type

Folder

- ☐ Document
- ☐ -- 2018
- ☐ -- 2017

Currency

Range ☒ Custom ☐ Current Month ☐ Previous Month ☐ Today ☐ Yesterday

Start Date - - (YYYY-MM-DD)

End Date - - (YYYY-MM-DD)

Status

Last Generated --

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

User needs to provide a report name for the report.

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

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

The sample output of Global Sales Report is shown below.

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

The screenshot shows a window titled "Monthly Sales Report" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a menu bar with "File", "Export", "Password", and "Buy Now" (in red). A toolbar contains icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main area is labeled "Criteria" and contains the following fields:

- A descriptive text: "This report will group the invoices, for a specified year, by month."
- "Report Name": A text input field.
- "Document Type": A dropdown menu currently showing "Invoice".
- "Folder": A list box with three items: "Document" (with a folder icon), "-- 2018" (with a folder icon), and "-- 2017" (with a folder icon). The "Document" item is selected.
- "Currency": A dropdown menu showing "United States Dollar, \$".
- "Year": A dropdown menu showing "2019".
- "Status": A dropdown menu showing "-- All Status --".
- "Last Generated": A text field showing "--".

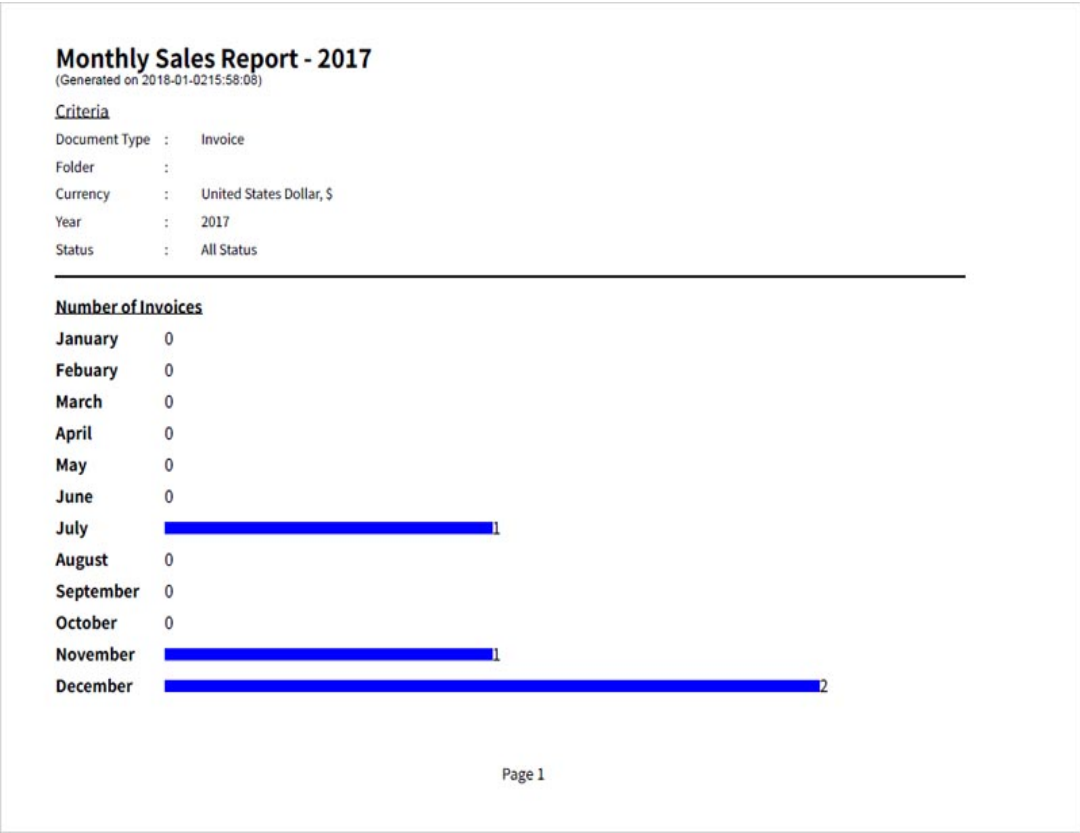
Monthly sales report provides sales information on monthly basis in graphical format. It shows the number of invoices issued and total sales amount.

User needs to provide a report name for the report.

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

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

The sample output of Monthly Sales Report is shown below.



8.3. Sales Report by Customer

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

User needs to provide a report name for the report.

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

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

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

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

Customer Sales Report - 2017 DEC

(Generated on 2018-01-02 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 user overview information on the payment activities; include number of receipt issued, and amount collected. The report is counted on Receipt document.

User needs to provide a report name for the report.

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

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

The sample output of Global Payment Report is shown below.

Global Payment Report - Last Month Receipt (Generated on 2018-01-02 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

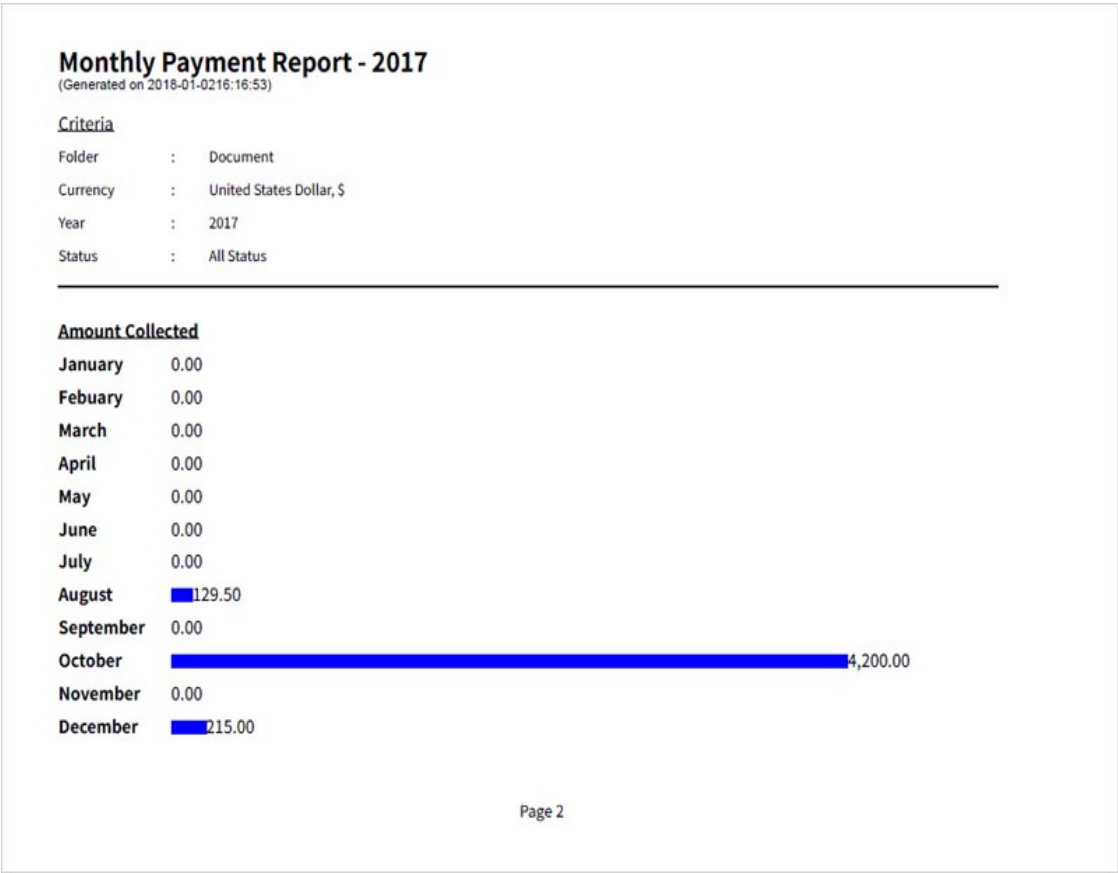
Monthly Payment report provides payment information on monthly basis in graphical format. It shows the number of receipts issued and total amount collected.

User needs to provide a report name for the report.

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

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

The sample output of Monthly Payment Report is shown below.



8.6. Payment Report by Customer

Payment Report by Customer

File Export Password Buy Now

Save Preview Print Quick Export Set Password Re-generate

Criteria

This report will calculate based on the receipts of the selected customers.

Report Name

Folder

- ☐ Document
- ☐ --- 2018
- ☐ --- 2017

Currency: United States Dollar, \$

Range: ☒ Custom ☐ Current Month ☐ Previous Month ☐ Today ☐ Yesterday

Start Date: - (YYYY-MM-DD)

End Date: - (YYYY-MM-DD)

Customer: ☐ All Customers in Customer List ☒ Not listed in Customer List ☐ Pick from Customer List

Load from Customer List Remove Selected

Status: -- All Status --

Last Generated: --

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

User needs to provide a report name for the report.

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

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

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

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

Customer Payment Report - 2017 Dec

(Generated on 2018-01-02 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

The screenshot shows a web application window titled "Monthly Statement". 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 and options:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Invoice".
- Folder:** A list box showing "Document", "-- 2018", and "-- 2017".
- Currency:** A dropdown menu currently set to "United States Dollar, \$".
- Customer:** Radio buttons for "Full List" (selected) and a text input field. A "Load from Customer List" button is next to the input field.
- Month:** Radio buttons for "Current Month" (selected), "Previous Month", and a date range selector for "2019" and "1".
- Count against:** Radio buttons for "Document Date" (selected) and "Shipping Date".
- Show:** Checkboxes for "Order No.", "Status", "Deposit", "Balance", "Payment Received", and "Outstanding Balance".
- Status:** A dropdown menu currently set to "-- All Status --".
- Last Generated:** A text field showing "--".


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

User needs to provide a report name for the report.

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

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

The sample PDF output of Monthly Statement is shown below.



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

Monthly Statement

Customer

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

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

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

Page 1

8.8. Customer Purchase History

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

The screenshot shows a web application window titled "Customer Purchase History". 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 a description: "This report will list item purchase record of the selected customers based on the Invoices." Below this are several form fields and controls:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Invoice".
- Folder:** A section containing a checkbox and a folder icon labeled "Document".
- Currency:** A dropdown menu currently set to "India Rupee, INR".
- Date Range:** A section with radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below these are two date pickers showing "24" and "24" with a "to" label in between.
- Customer:** A text input field with a "Load from Customer List" button next to it.
- Item Name:** A large text input field with "Load from Item List" and "Remove Selected" buttons below it.
- Status:** A dropdown menu currently set to "-- All Status --".
- Last Generated:** A text input field currently showing "--".

8.9. Item Sales Report

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

The screenshot shows a window titled "Item Sales Report" with a menu bar (File, Export, Password, Buy Now) and a toolbar (Save, Preview, Print, Quick Export, Set Password, Re-generate). The main area is labeled "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 a checked "Document" folder icon.
- Currency:** A dropdown menu set to "United States Dollar, \$".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". The "Custom" option is selected, with date pickers showing "24" for both 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 set to "-- All Status --".
- Last Generated:** A label showing the timestamp "06-05-2021 00:10:50".

A descriptive text at the top of the Criteria section states: "This report will calculate total amount, quantity and average price of item based on the Invoices."

8.10. Sales Person Report

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

The screenshot shows a web application window titled "Sales Person 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:

- A message: "This report will generate Invoice total of selected sales person."
- "Report Name": A text input field.
- "Document Type": A dropdown menu with "Invoice" selected.
- "Folder": A section containing a checkbox labeled "Document" and a large empty text area.
- "Currency": A dropdown menu with "India Rupee, INR" selected.
- "Sales Person": A dropdown menu.
- "Month": A section with three radio buttons: "Current Month" (selected), "Previous Month", and "2021" (with a dropdown arrow). To the right of "2021" is a dropdown menu with "5" selected.
- "From": A section with two radio buttons: "From" (selected) and "to". To the right of "From" is a dropdown menu with "2000" selected, followed by a dropdown menu with "1" selected. To the right of "to" is a dropdown menu with "2000" selected, followed by a dropdown menu with "1" selected.
- "Search": A section with three dropdown menus, each followed by the text "contains" and a text input field.
- "Show": A section with three checkboxes: "Status", "Payment Received", and "Outstanding Balance".
- "Status": A dropdown menu with "-- All Status --" selected.
- "Last Generated": A dropdown menu with "--" selected.

8.11. Total Tax Payable Report

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

User needs to provide a report name for the report.

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

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

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

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

Page 1

8.12. Supplier Report

The screenshot shows the 'Supplier Report' window. At the top, there's 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 and options:

- Report Name:** A text input field.
- Folder:** A list box with three options: ☐ Document, ☐ -- 2018, and ☐ -- 2017.
- Currency:** A dropdown menu set to 'United States Dollar, \$'.
- Range:** Radio buttons for ☒ Custom, ☐ Current Month, ☐ Previous Month, ☐ Today, and ☐ Yesterday.
- Start Date:** A date picker set to (YYYY-MM-DD) 24.
- End Date:** A date picker set to (YYYY-MM-DD) 24.
- Supplier:** Radio buttons for ☐ All Suppliers in Supplier List, ☒ Not listed in Supplier List, and ☐ Pick from Supplier List. Below these is a text input field and two buttons: 'Load from Supplier List' and 'Remove Selected'.
- Status:** A dropdown menu set to '-- All Status --'.
- Last Generated:** A text field showing '--'.

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

User needs to provide a report name for the report.

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

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

The sample output of Supplier Report is shown below.

Supplier Report - 2018
(Generated on 2018-01-03 00:27:17)

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

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

Page 1

8.13. Monthly Statement for Supplier


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

User needs to provide a report name for the report.

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

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

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



Evinco Solutions Limited
- Provides Innovative Business Software
Unit 2202, Causeway Bay Plaza I
409 Hennessy Road
Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588
Email: info@evinco-software.com
Website: <https://www.evinco-software.com>

Monthly Statement
for Supplier

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

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

Page 1

8.14. Raw Data Export

Raw Data Export

File Export Password Buy Now

Save Export Set Password

Criteria

Raw Data Export will export every details of the documents that fit the criteria into an excel file.

Report Name

Document Type: Invoice

Folder: Document, --- 2018, --- 2017

Range: Custom (selected), Current Month, Previous Month, Today, Yesterday

Start Date: (YYYY-MM-DD)

End Date: (YYYY-MM-DD)

Status: -- All Status --

Show Columns:

- ☐ Invoice No.
- ☐ Date
- ☐ Currency
- ☐ Bill To
- ☐ Bill To Address
- ☐ Tel
- ☐ Ship To
- ☐ Ship To Address
- ☐ Tel
- ☐ Order No.
- ☐ Sales Rep.
- ☐ Shipping Date
- ☐ Shipping Term
- ☐ Payment Term
- ☐ Custom Field 1
- ☐ Custom Field 2
- ☐ Custom Field 3
- ☐ Custom Field 4
- ☐ Custom Field 5
- ☐ Custom Field 6
- ☐ Photo
- ☐ #
- ☐ ID
- ☐ Description
- ☐ Supplier
- ☐ Spec
- ☐ Unit
- ☐ Unit Price
- ☐ Qty
- ☐ Discount %
- ☐ Taxable
- ☐ Total
- ☐ Tax %
- ☐ Tax Amount
- ☐ Total (inc Tax)
- ☐ Sub-Total
- ☐ Discount
- ☐ Shipping
- ☐ Packaging
- ☐ Total
- ☐ Item Tax
- ☐ Tax
- ☐ Tax 2
- ☐ Tax 3
- ☐ Insurance
- ☐ Rounding Adjustment
- ☐ Total
- ☐ Deposit
- ☐ Balance
- ☐ Notes
- ☐ Payment Link
- ☐ Status
- ☐ Comment

Select All Clear All

Shading: ☐ Apply shading for alternate row

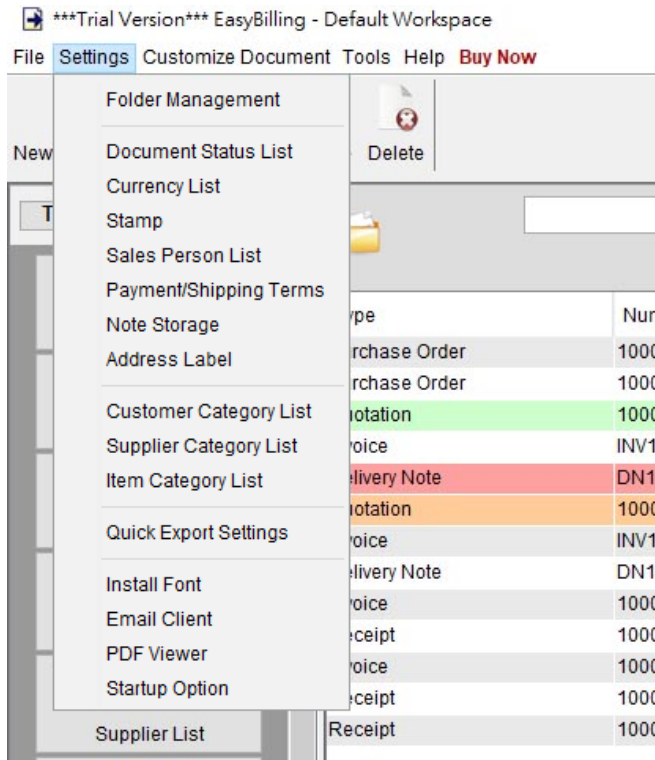
Raw Data Export allows user to get details information of the document created in EasyBilling.

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

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

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

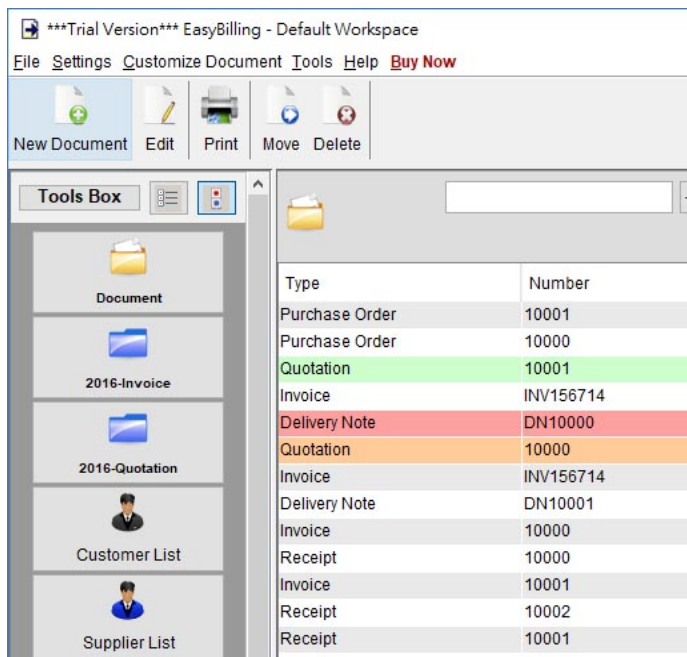
9. SETTINGS



User can configure EasyBilling by adjust different settings easily.

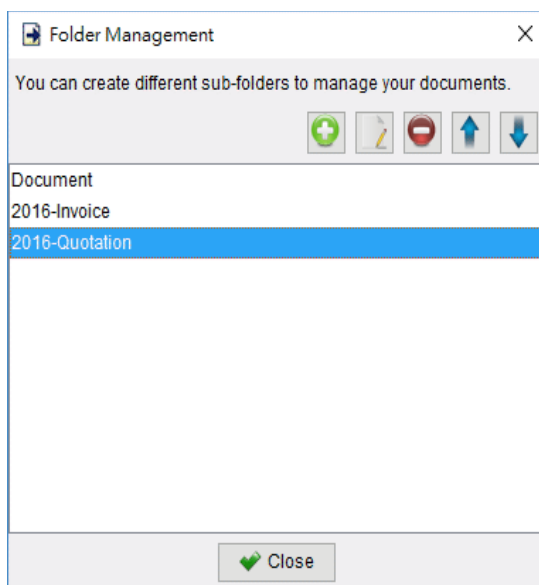
- Folder Management
- Document Status List
- Currency List
- Stamp
- Sales Person List
- Payment/Shipping Terms
- Notes Storage
- Address Label
- Customer Category List
- Supplier Category List
- Item Category List
- Quick Export Settings
- Install Font
- Email Client
- PDF Viewer
- Startup Option

9.1. Folder Management



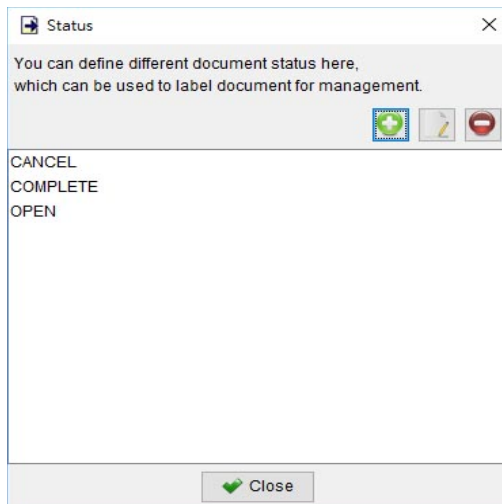
In EasyBilling, by default, there is one folder called "Document". But user can create other folders to organize the documents. EasyBilling supports one lever sub-folder, user can create sub-folder under another folder.

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



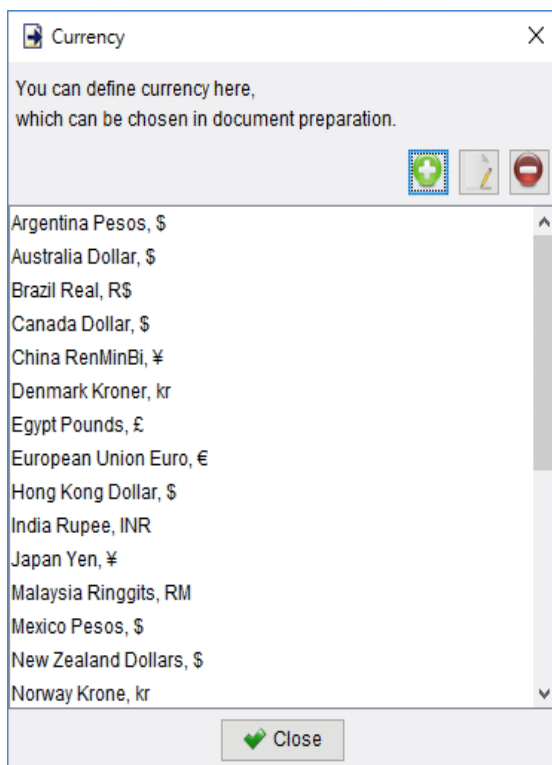
9.2. Document Status List

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



9.3. Currency List

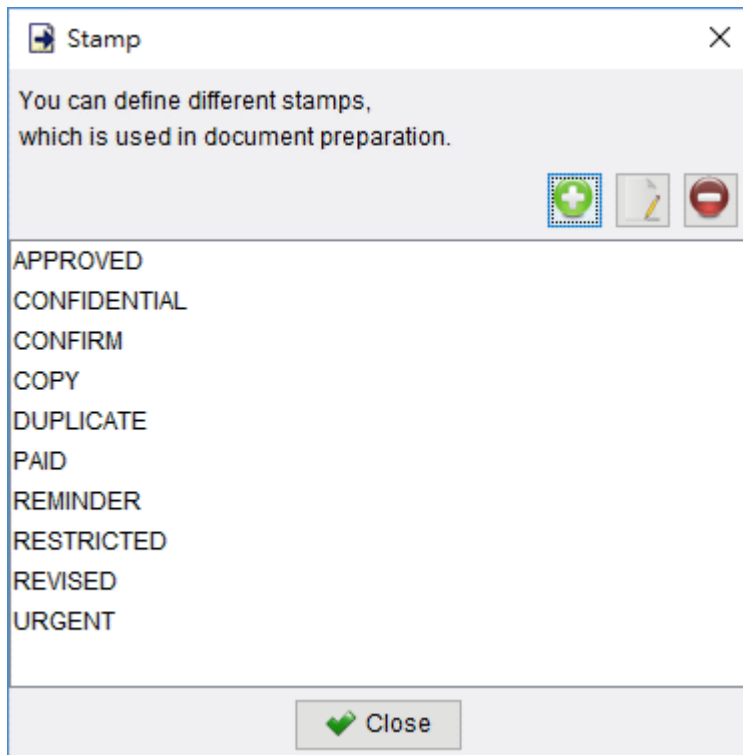
In EasyBilling, document can be set with different currencies. User can maintain Currency List here. Click icon at the top-right corner to add, edit or delete currency.



9.4. Stamp

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

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

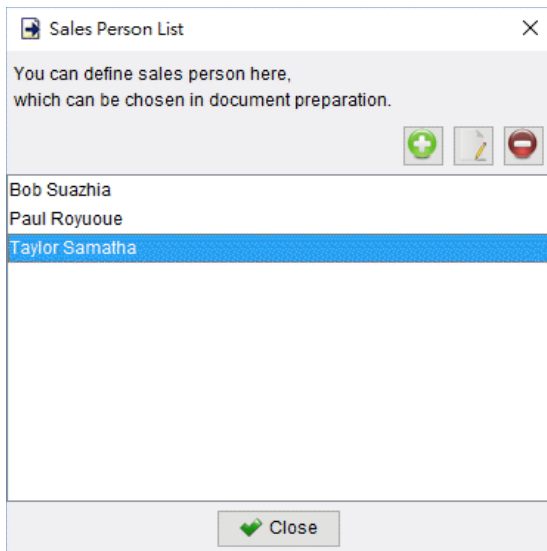


To maintain the list, click the icon at the top-right corner to add, edit and delete. By default, it has

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

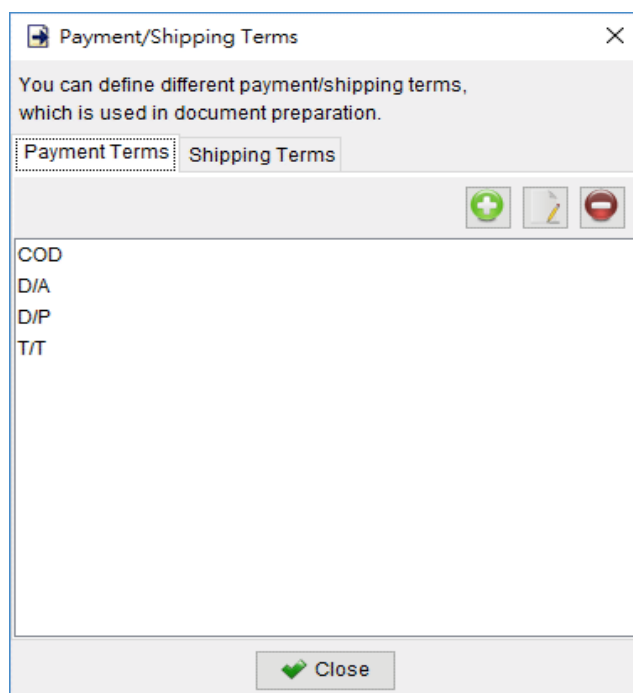
9.5. Sales Person List

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



9.6. Payment/Shipping Terms

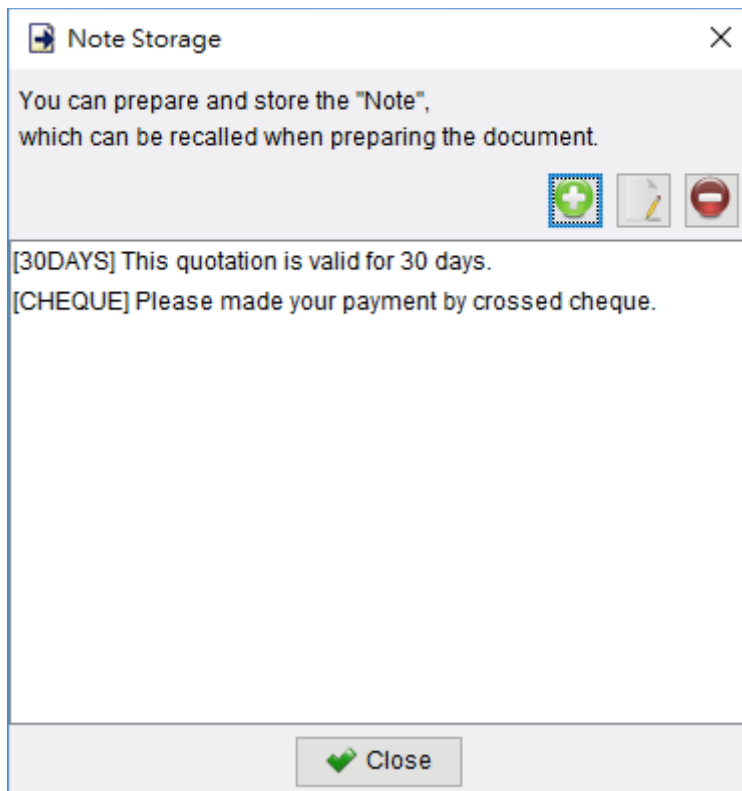
Payment Terms and Shipping Terms are listed here. User can click icon at the top-right corner to add, edit or delete. When preparing document, user can choose the terms from this list.



9.7. Notes Storage

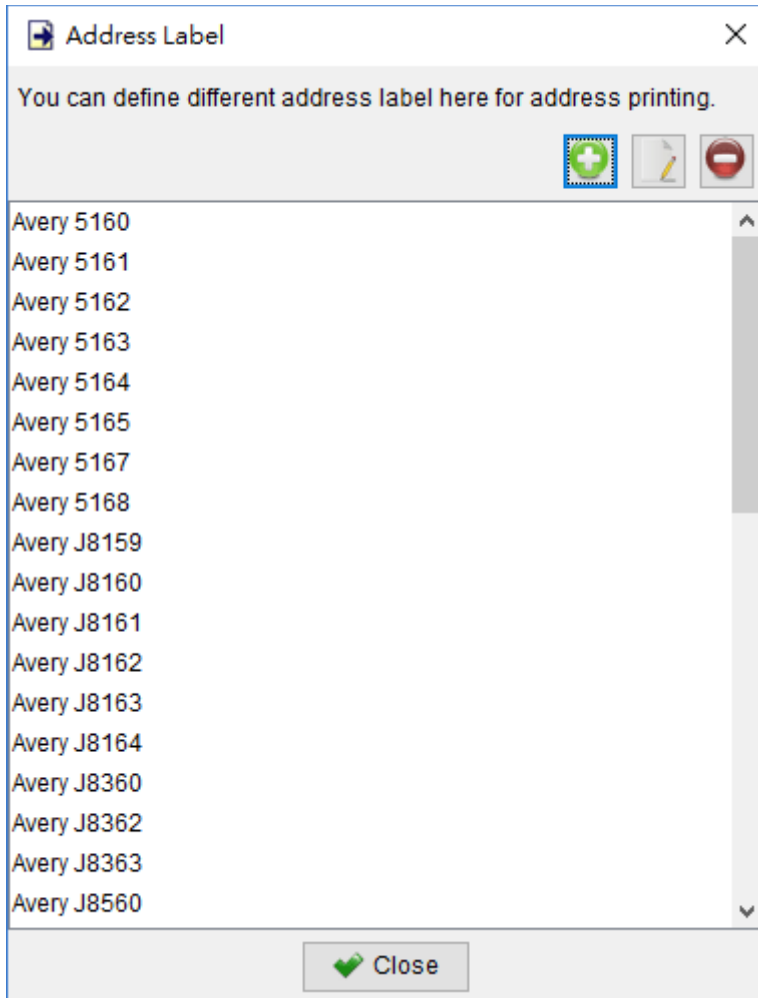
When preparing document, user can load the notes directly from this Notes Storage.

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



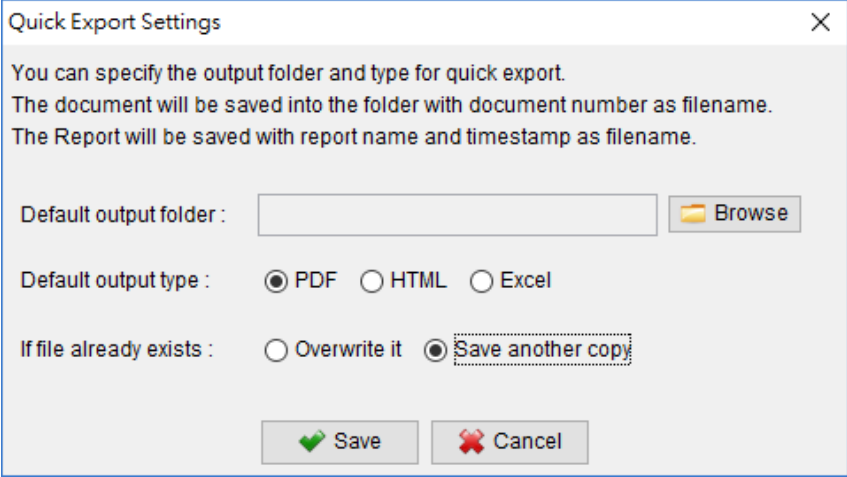
9.8. Address Label

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




9.9. Quick Export Settings

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



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

You can specify the output folder and type for quick export.
The document will be saved into the folder with document number as filename.
The Report will be saved with report name and timestamp as filename.

Default output folder :  Browse

Default output type : ☒ PDF ☐ HTML ☐ Excel

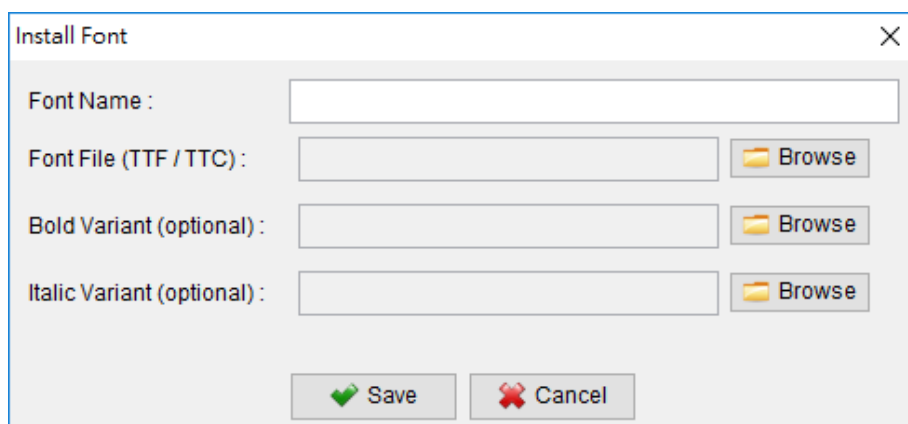
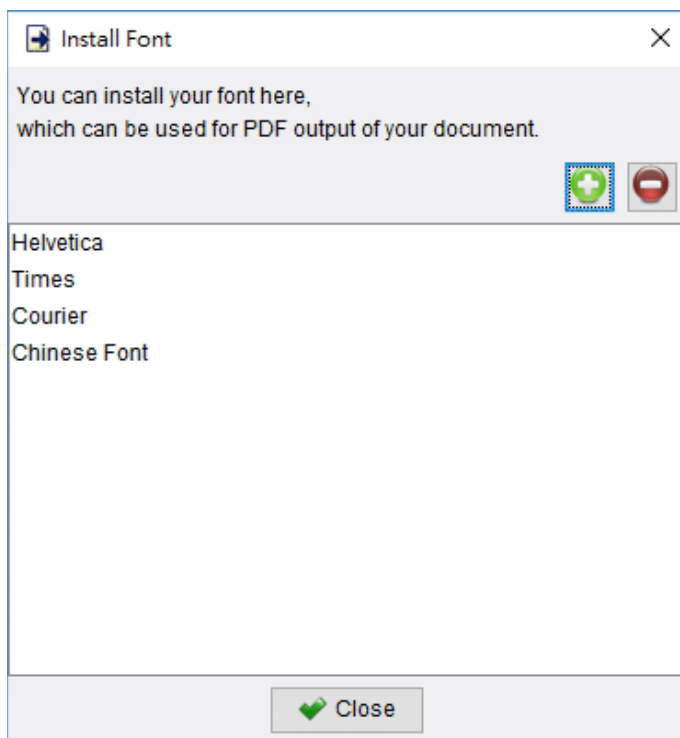
If file already exists : ☐ Overwrite it ☒ Save another copy

At the bottom, there are two buttons: 'Save' with a green checkmark icon and 'Cancel' with a red X icon.

9.10. Install Font

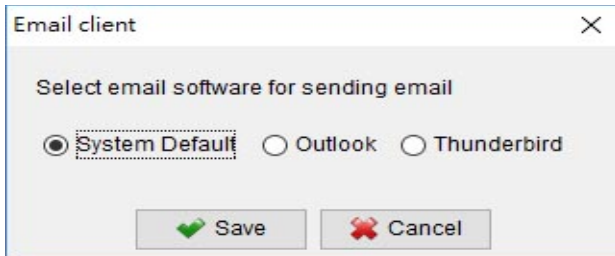
Besides the four built-in fonts, you can install your own font into EasyBilling. It supports TTC or TTF format.

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



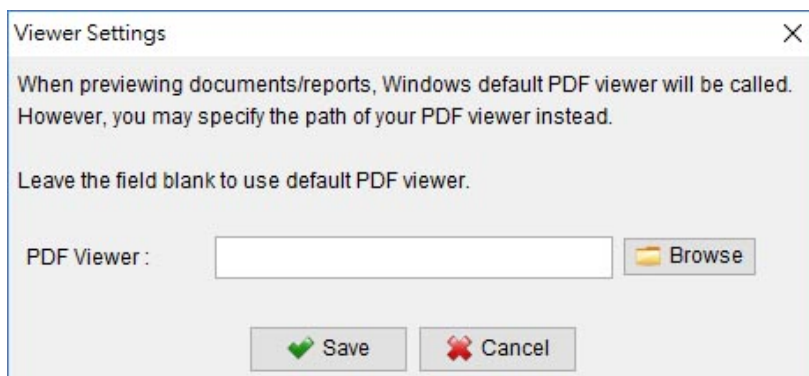
9.11. Email Client

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



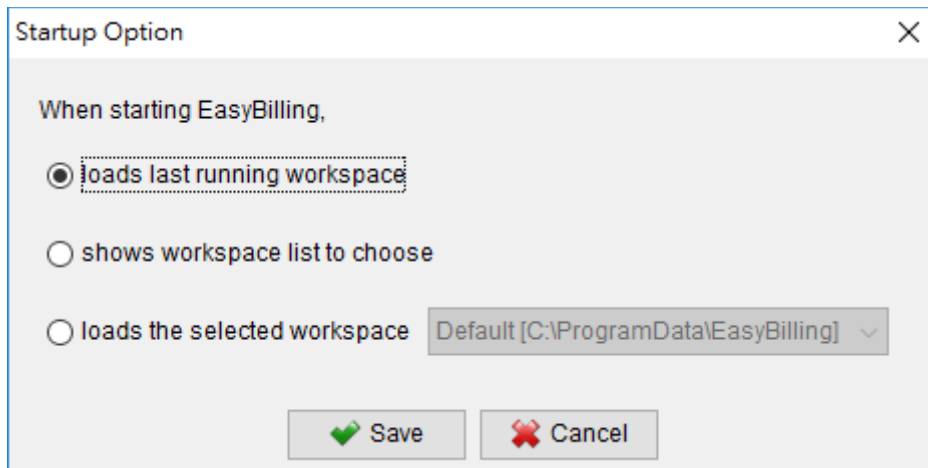
9.12. PDF Viewer

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

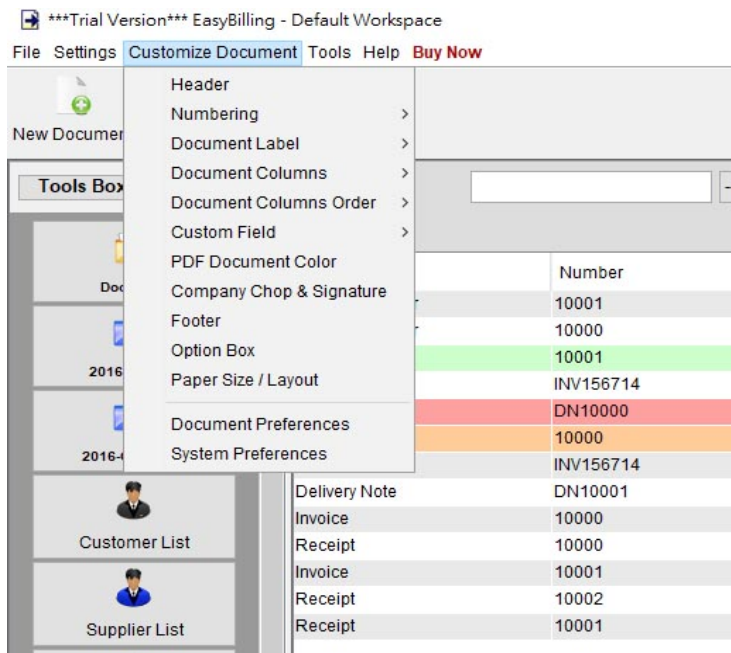


9.13. Startup Option

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



10. CUSTOMIZE DOCUMENT



User can customize document to fit the business needs.

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


10.1. Header

User can define the header used in document.

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

☒ Print header with default layout

Company Information

 Company Name : Evinco Solutions Limited
(Line2) : - Provides Innovative Business Software
Address : 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
VAT No. : Company Reg. No. :
Logo Image Size should be in 300x300 pixels

Click to Add Logo... Remove

☐ Print header with image file

Click to Add Image... 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 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

Quote No. SAMPLE-QUO-001
Quotation

Quote To: Sample Company
New York, United States
Tel 21234567

Ship To: Sample Company
New York, United States
Tel 34567890

Date	2017-12-29	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2017-12-29	Shipping Term	COURIER	Payment Term	COD
ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	59.95	1	59.95
Sub-Total (\$)					59.95
Discount (\$)					9.95
Shipping (\$)					3.00
Overall Total (\$)					63.00

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

For And On Behalf Of For And On Behalf Of

Authorized Signature Authorized Signature

There are three option can be chosen in Header.

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

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

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

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

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

10.2. Numbering

Numbering - Quotation

You can specify the pattern and starting number for the 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

Numbering

Current Starting Number :

Number assigned in next document :

New Starting Number :

☒ Show Barcode Format

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

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

Example 1 Numbering Pattern: INV#

Current Number: 23 => Output: INV23

Current Number: 345678 => Output: INV345678

Example 2 Numbering Pattern: INV0000#

Current Number: 23 => Output: INV00023

Current Number: 345678 => Output: INV345678

Example 3 Numbering Pattern: INV{YYYY}0000#

Current Number: 23 => Output: INV201800023

Current Number: 345678 => Output: INV2018345678

10.3. Document Label

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

Document Label - Quotation

You can rename the text label, which shown in the document output. (Use "n" for line break)

Label	Rename To
Quote No.	Quote No.
Quotation	Quotation
Quote To	Quote To
Billing Address Tel	Tel
Ship To	Ship To
Shipping Address Tel	Tel
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
Overall Total	Overall Total
Notes	Notes
For And On Behalf Of	For And On Behalf Of
Authorized Signature(s)	Authorized Signature
Date	Date
For And On Behalf Of	For And On Behalf Of

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 I
469 Hennessy Road
Causeway Bay, Hong Kong
Tel : +852 31070832 Fax : +852 30209588
Email : 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

Ship To

Sample Company
New York, United States
Tel 34567890

Date	2017-12-29	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2017-12-29	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	59.95	1	59.95
					Sub-Total (\$)
					59.95
					Discount (\$)
					9.95
					Shipping (\$)
					3.00
					Overall Total (\$)
					53.00

Notes

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

For And On Behalf Of

For And On Behalf Of

Authorized Signature

Authorized Signature

Save

Cancel

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

10.4. Document Column

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

Document Columns - Quotation

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

Show Columns **Width (mm)**

☐ # 0

☐ Photo 0

☒ ID 10

Product Description 112

☐ Supplier 0

☐ Spec 0

☐ Info 1 0

☐ Info 2 0

☐ Info 3 0

☒ Unit 13

☒ Price 23

☒ Qty 12

☐ Discount % 0

☐ Taxable 0

☒ Total 20

☐ Tax % 0

☐ Tax Amount 0

☐ Total (inc Tax) 0

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 - Feature A - Feature B	PCS	39.95	1	39.95
002	Sample Product #002 - Feature C	PCS	10.00	2	20.00

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)**

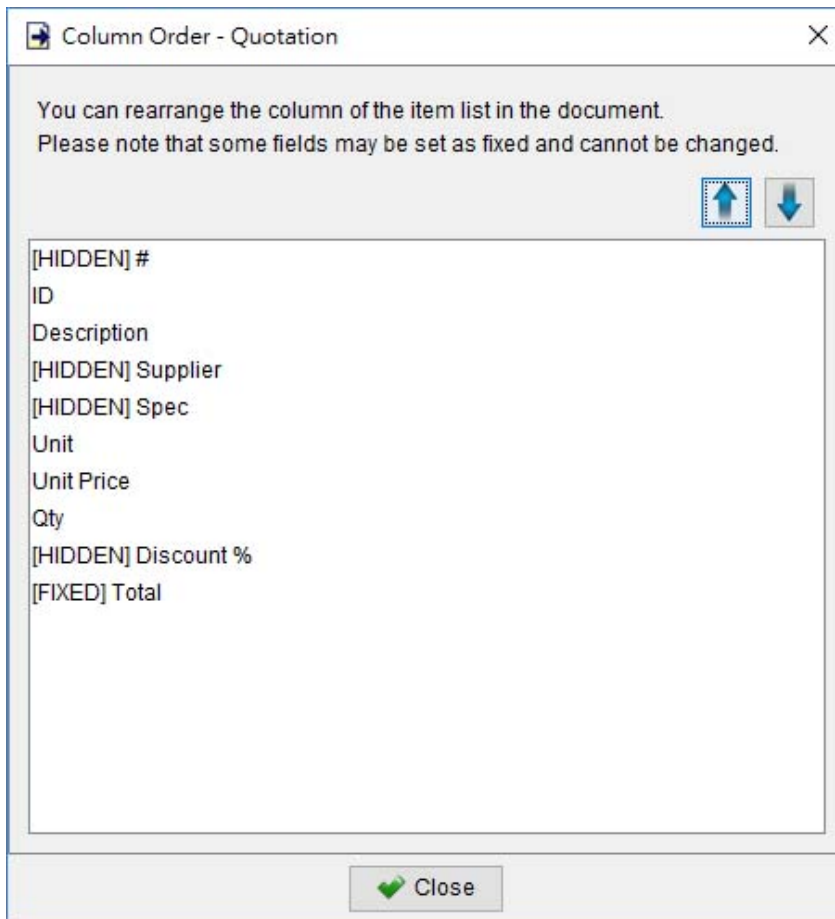
Save **Cancel**

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

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

10.5. Document Column Order

User can rearrange the column of line item in document.



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

10.6. Custom Field

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

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

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

Custom Field - Quotation

User can create additional fields in document.
Notes: Changes only apply to new documents.

Section I: Below Date fields
- allow six custom fields
- specify field name, type and size below

1. Text 3/3
2. Text 1/3
3. Text 1/3
4. Text 1/3
5. Text 1/3
6. Text 1/3

Section II: Above Notes field
- allow two custom fields

1.
2.

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

Refresh

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	06-05-2021	Shipping Through	COURIER	Payment Term	COD

Subject

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

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

Terms

Testing Message.

Notes

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

Save

Cancel

10.7. PDF Document Color

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

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

Proforma Invoice

Invoice

Tax Invoice

Receipt

Purchase Order

Delivery Note

Packing Slip

Ordering

Packing List

Weight List

Credit Note

Debit Note

Header Color

Document Number Color

Document Line Color

Stamp Color Square Round

Border Color

Shadow Color

Label Color NORMAL BOLD

Entry Color NORMAL BOLD

Alternate Row Color in Item List

Line Color in Item List

Footer Color

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"

APPROVED 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

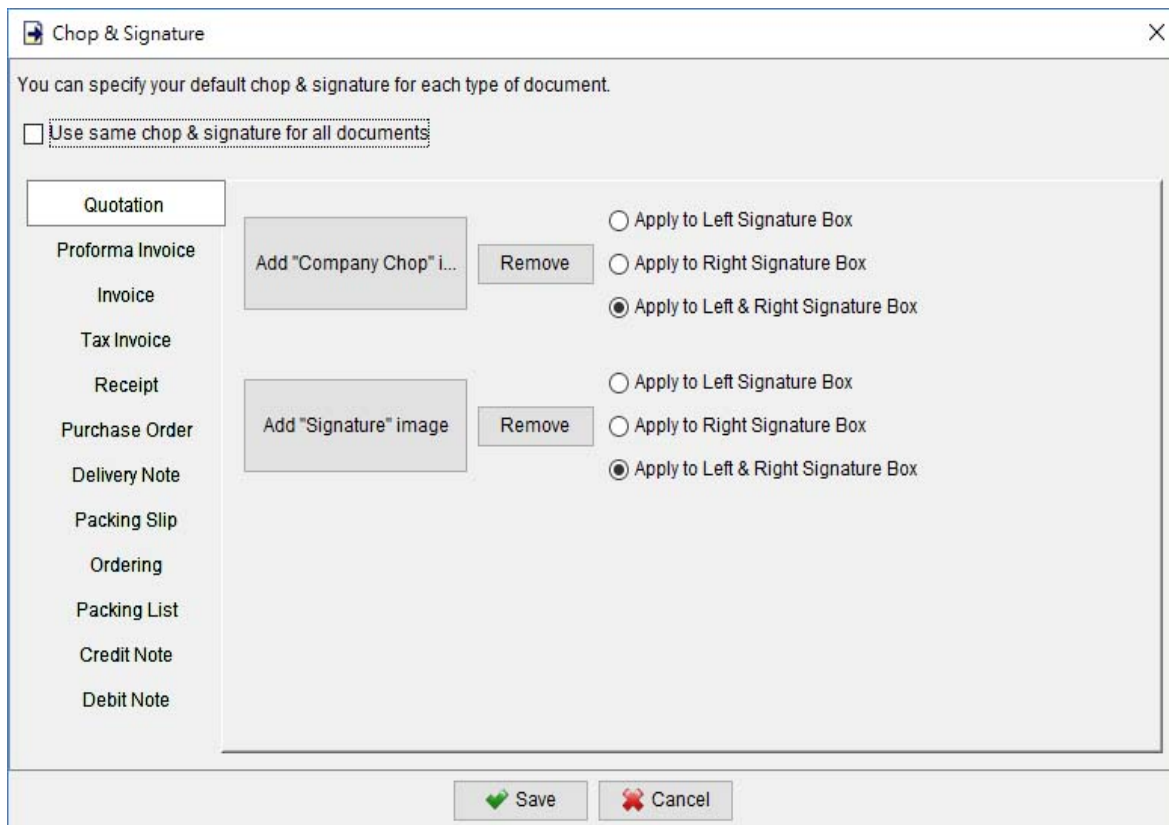
Authorized Signature(s) Authorized Signature(s)

Save Cancel

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

10.8. Chop & Signature

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



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

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

10.9. Footer

User can define footer for different documents.

Footer

There are three parts in the footer: left, center and right. You can set them as page number, date or your own text. You can also specify the contact information in footer.

☐ Use same footer for all documents

Quotation

Proforma Invoice
Invoice
Tax Invoice
Receipt
Purchase Order
Delivery Note
Packing Slip
Ordering
Packing List
Credit Note
Debit Note

☒ Print footer with default layout

Left: ☒ Date ☐

Center: ☐ Page No. (Page #) ☒

Right: ☒ Page No. (Page #) ☐

Contact Information

Address:

Tel:

Fax:

Email:

Website:

☐ Print footer with image file

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.

Quote No. SAMPLE-QUO-001

Quotation

Quote To:
New York, United States
Tel 21234567

Ship To:
New York, United States
Tel 34567890

Date	2017-12-29	Sales Rep.	Peter Smith	Customer Ref. No.	EV512345
Shipping Date	2017-12-29	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	\$9.95	1	\$9.95
Sub-Total (\$)					\$9.95
Discount (\$)					9.95
Shipping (\$)					3.00
Overall Total (\$)					\$3.00

Notes

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

For And On Behalf Of For And On Behalf Of

Authorized Signature Authorized Signature

2017-12-29 Page 1

Address: 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

There are two lines in footer.

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

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

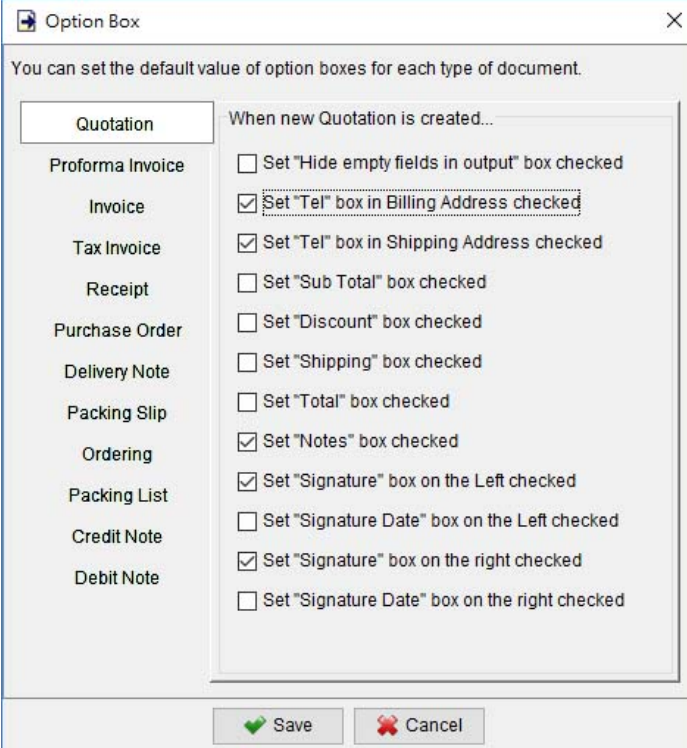
Click on the document name to switch between different types of document and set the footer. Check the box at the top if user wants to use the same footer for all types of documents.

10.10.Option Box

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

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

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



The image shows a dialog box titled "Option Box" with a close button (X) in the top right corner. Inside the dialog, there is a message: "You can set the default value of option boxes for each type of document." Below this message, there is a list of document types on the left and a set of checkboxes on the right. The document types listed are: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Credit Note, and Debit Note. The "Quotation" type is currently selected. The checkboxes on the right are: "Set 'Hide empty fields in output' box checked" (unchecked), "Set 'Tel' box in Billing Address checked" (checked), "Set 'Tel' box in Shipping Address checked" (checked), "Set 'Sub Total' box checked" (unchecked), "Set 'Discount' box checked" (unchecked), "Set 'Shipping' box checked" (unchecked), "Set 'Total' box checked" (unchecked), "Set 'Notes' box checked" (checked), "Set 'Signature' box on the Left checked" (checked), "Set 'Signature Date' box on the Left checked" (unchecked), "Set 'Signature' box on the right checked" (checked), and "Set 'Signature Date' box on the right checked" (unchecked). At the bottom of the dialog, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

Document Type	When new [Document Type] is created...
Quotation	<input type="checkbox"/> Set "Hide empty fields in output" box checked <input checked="" type="checkbox"/> Set "Tel" box in Billing Address checked <input checked="" type="checkbox"/> Set "Tel" box in Shipping Address checked <input type="checkbox"/> Set "Sub Total" box checked <input type="checkbox"/> Set "Discount" box checked <input type="checkbox"/> Set "Shipping" box checked <input type="checkbox"/> Set "Total" box checked <input checked="" type="checkbox"/> Set "Notes" box checked <input checked="" type="checkbox"/> Set "Signature" box on the Left checked <input type="checkbox"/> Set "Signature Date" box on the Left checked <input checked="" type="checkbox"/> Set "Signature" box on the right checked <input type="checkbox"/> Set "Signature Date" box on the right checked
Proforma Invoice	
Invoice	
Tax Invoice	
Receipt	
Purchase Order	
Delivery Note	
Packing Slip	
Ordering	
Packing List	
Credit Note	
Debit Note	

Save Cancel

10.11. Paper Size / Layout

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

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

Paper Size

Select paper size and layout for the document

☐ Use same paper and layout 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

Paper Size

A4 (210mm x 297mm)

Layout

☒ Modern ☐ Basic ☐ Table

Your company name, logo and other infos
Set in menu "Customize Document > Header"

APPROVED

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

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

10.12. Document Preferences

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

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

The screenshot shows a 'Document Preferences' dialog box with a sidebar on the left containing the following tabs: Document Date, Document Font (selected), Margin, PDF File Properties, Print Duplicate/Triplicate, Tax Rate / Calculation, Deposit Rate, Insurance Field, Packaging Field, Rounding Adjustment, Amount in Words, Order/Payment URL, and Miscellaneous. The main content area for the 'Document Font' tab displays the following settings:

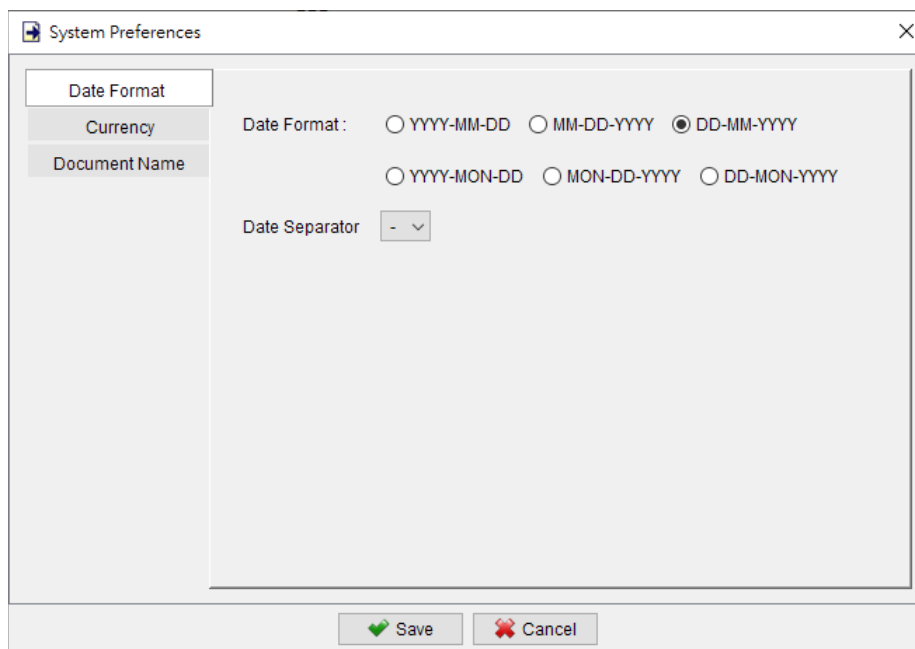
- Default Font Type : ☒ Helvetica ☐ Times ☐ Courier ☐ Chinese Font
- Report Font : ☒ Helvetica ☐ Times ☐ Courier ☐ Chinese Font
- Default Font Size : ☐ Extra Large ☐ Larger ☐ Large ☒ Medium ☐ Small ☐ Smaller ☐ Extra Small
- Default Writing Mode : ☒ Left to Right ☐ Right to Left

At the bottom of the dialog box are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

10.13. System Preferences

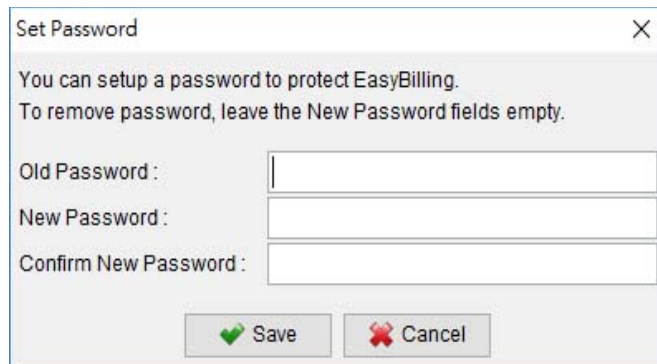
System Preferences allow to set the Sorting, Date Format and Currency for the EasyBilling.

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



11. TOOLS

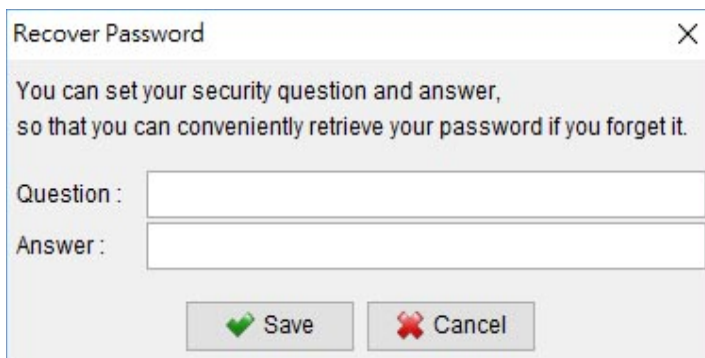
11.1. Set Password



The 'Set Password' dialog box has a title bar with a close button (X). The main text reads: 'You can setup a 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: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

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

11.2. Recover Password Option

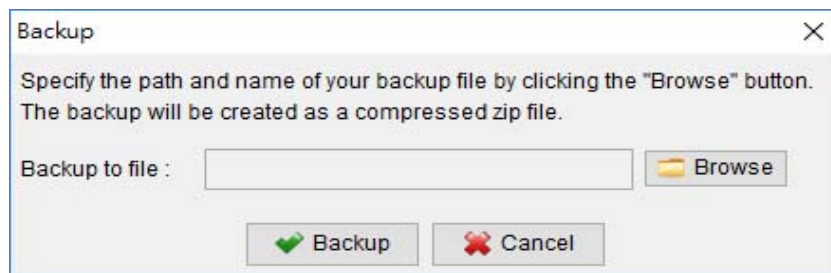


The 'Recover Password' dialog box has a title bar with a close button (X). The main text reads: 'You can set your security question and answer, so that you can conveniently retrieve your password if you forget it.' Below this, there are two input fields: 'Question:' and 'Answer:'. At the bottom, there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

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

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

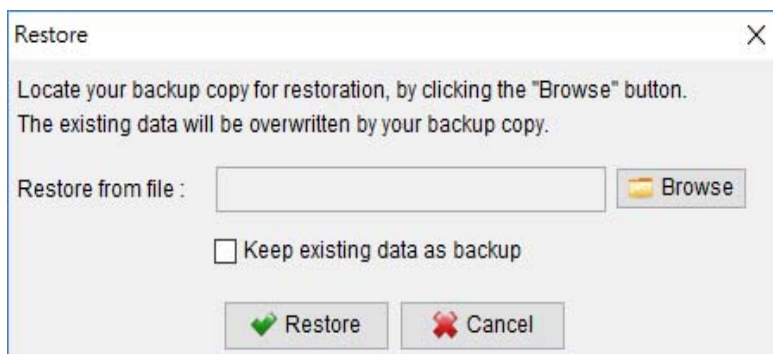
11.3. Backup



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

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

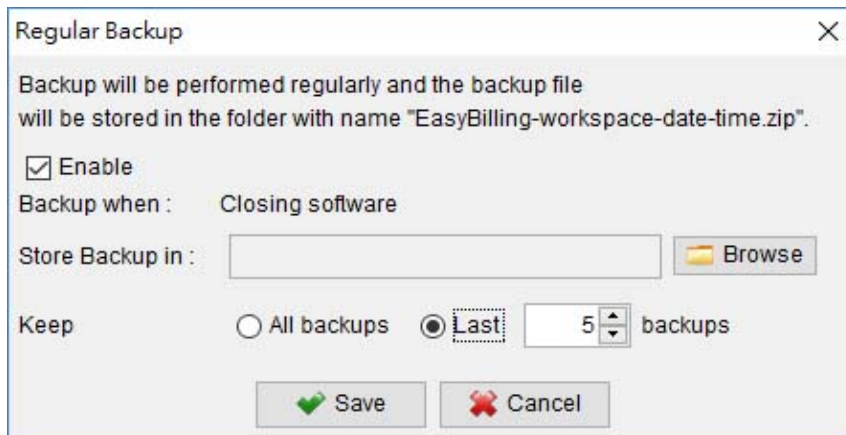
11.4. Restore



User can restore the backup data to the system.

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

11.5. Regular Backup



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

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

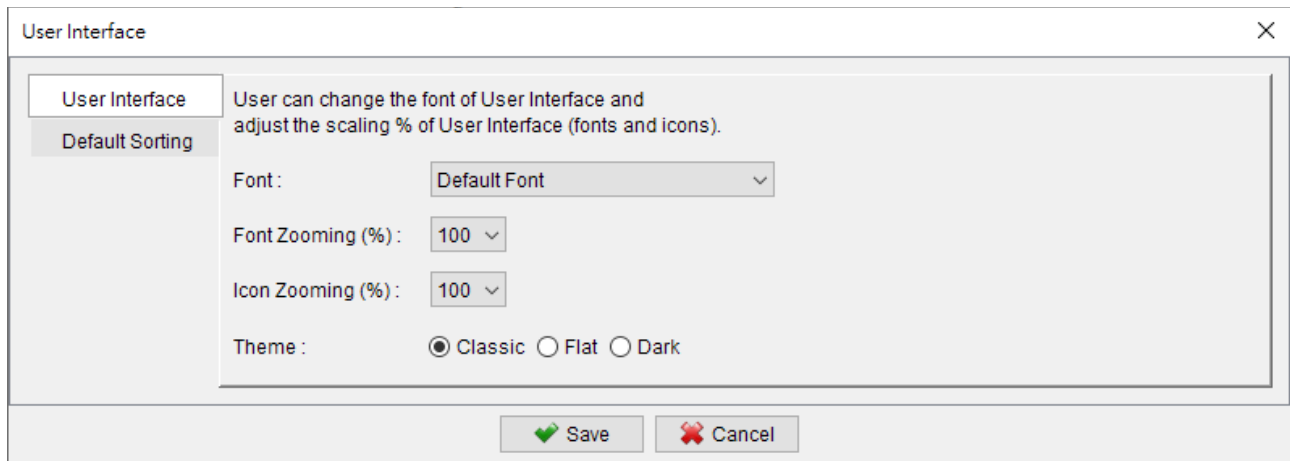
11.6. Shortcut Key

Action	Shortcut Key
New Quotation :	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 Credit Note :	CTRL + (NOT SET)
New Debit Note :	CTRL + (NOT SET)
Customer List :	CTRL + C
Supplier List :	CTRL + S

Save Cancel

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

11.7. User Interface



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

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

12. REGISTER

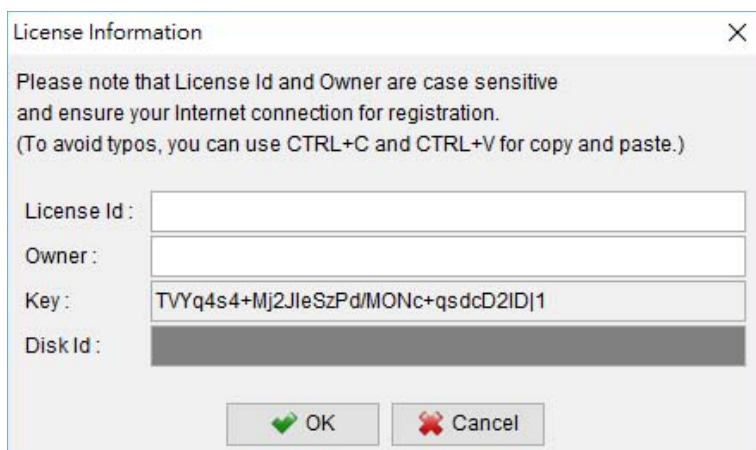
12.1. Trial Version

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

12.2. Registration

To register the EasyBilling,

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



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

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

12.3. Why I can't do registration?

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

13. IMPORT FILE FORMAT

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

Please note the following when preparing the import file

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

Sample Import file can be downloaded below

- "Customers" (XLS)

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

- "Suppliers" (XLS)

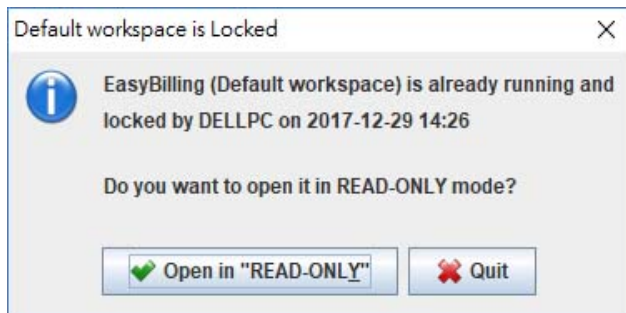
<https://www.evinco-software.com/easydoc/sample/importSupplier-v2.xls>

- "Items" (XLS)

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

14. DATABASE LOCKED

14.1. Database locked / Read-Only Mode



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

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

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

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