Welcome to Client Biller!

Client Biller, Version 2.10, January 1995

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Client Biller was written by James Bell.   E-Mail comments/questions/suggestions to (Internet)   newsw@netcom.com

Introduction to Client Biller

Client Biller is really a simple program with a simple task: <u>Make Invoices</u>.   As a consultant I hated keeping track of clients, invoices, phone numbers, invoice numbers, etc.   Client Biller keeps track of all these things for me and it does it well.

This latest version adds several new features including:

- Support for two more types of taxes
- A new line graph report
- Printable To-Do list of a days reminders
- New enhanced installation program
- Exporting clients to a dBase file
- Built-in database backup and restore
- More!

Future plans include:

- An Expense tracking sub-system
- Profit reports
- A seperate program to track purchase orders
- More great suggestions from users like you!

Several Client Biller features were the result of user suggestions.   If you have an idea for Client Biller, drop us a line:

<u>NEW Software</u>
<u>PO Box 57336</u>   <u>Phone: (904) 292-2815</u>
<u>Jacksonville, FL   32241</u>   <u>Internet: newsw@netcom.com</u>
<u>Attn: James Bell</u>

Shareware

Client Biller is Shareware.   You are allowed to   use it for up to ten days as an evaluation, but you **must register** to continue use.   Registration is simple and provides the following benefits:

- New versions!   This version may already be replaced by an update.
- You can get copies of other programs available from NEW Software.
- With a license number you can be registered instantly over the phone.
- You can use Express Shipping to have new versions sent ASAP.
- Upgrades are cheap, usually just $10.00.
- Flexible pricing lets you get exactly what you want.
- Site licenses available for 3 or more users.

You must get multiple copies if there will be multiple users!

Registering

By phone: Just call us at (904) 292-2815.

By e-mail: Send completed order form to (internet): newsw@netcom.com

By mail: Just print and fill out the order form and send your check or money order (US Dollars only) to us at:

NEW Software
PO Box 57336
Jacksonville, FL   32241-7336

See also: Order form

Prices
Client Biller   (Invoice-maker extraordinaire!) $24.99 / $29.99
Statline   (The Ultimate Windows Status Line) $24.99
TimeCalc   (Calculator for times) $9.99

See also: Other software from NEW Software

SuperPack
Client Biller, Billing Timer, Statline and TimeCalc $49.99

Shipping options
Express shipping (USA only) $5.00
Shipping outside the USA $2.00

```
*********************************************************************
Client Biller              Version 2.10               January 1995
*********************************************************************
  ------>  Visa and MasterCard accepted, see below for details  <------

Name_____  Company Name_____

Address_____

City_____   State____  Zip_____   Country_____

Phone (____)____-_____   E-Mail Svc & Address_____

Where did you get this software?_____

Quiz: I use: ( ) Win 3.1  ( ) Win 4.0  ( ) Win NT  ( ) Win for Workgroups

Favorite color_____   Other Shareware registered _____

Comments?_____
*********************************************************************
    Check      Product                                  Price
    ======     ================================         ========
  +----------------------------------------------------------------+
  | ( )      Client Biller (License number only)     $24.99  |
  |     -OR-                                                   |
  | ( )      Client Biller (Latest version shipped)  $29.99  |
  +----------------------------------------------------------------+
    ( )      Statline                                $24.99
             The Ultimate Windows Status Line

    ( )      Surf - WAV audio toolbox                $29.99

    ( )      TimeCalc - Calculator for times         $ 9.99

    ( )      SuperPack:  Client Biller, Statline,    $49.99
             and TimeCalc


*********************************************************************
Miscellaneous
=============
    ( )      Express Shipping (USA only)        Add  $ 5.00

    ( )      Shipping outside the USA           Add  $ 2.00

    ( )      3-1/2" diskette(s)                 Add  $ 1.00

         * Checks or money orders IN US DOLLARS only please *
*********************************************************************
Mail to: NEW Software              | Visa and MasterCard accepted |
         PO Box 57336              | Call us at: (904) 292-2815.  |
         Jacksonville, FL  32241-7336   +----------------------------+
```

Installing Client Biller

Run the INSTALL.EXE program that came with Client Biller.

Manual installation
1. Copy the CBILLER.EXE, BTIMER.EXE and CBILLER.HLP files to your Windows directory.
2. Click on the Program Manager group you'd like Client Biller to be in.
3. Select "File" then "New..." from the menu, click OK for a new program item.
4. Give the Command Line as "CBILLER.EXE", click OK.
5. Select "File" then "New..." from the menu, click OK for a new program item.
6. Give the Command Line as "BTIMER.EXE", click OK.

Note:
Client Biller will create and use 6 files: invoices.db, clients.db, charges.db, scharges.db, reminds.db, and cbiller.ini. **Do not delete these!** You can safely delete the scharges.db file if you want to erase all the items on your Standard Charges list.

Note: (for manual installation only)
If you are updating an older copy of Client Biller, the place where Client Biller looks for the CBILLER.INI file has changed. Client Biller now looks for the CBILLER.INI file in the same directory as the CBILLER.EXE file. The INSTALL program will correct for this automatically if it needs to, but you must copy the CBILLER.INI file yourself if you install Client Biller manually over a previous version.

Using Client Biller

Client Biller's Main Window
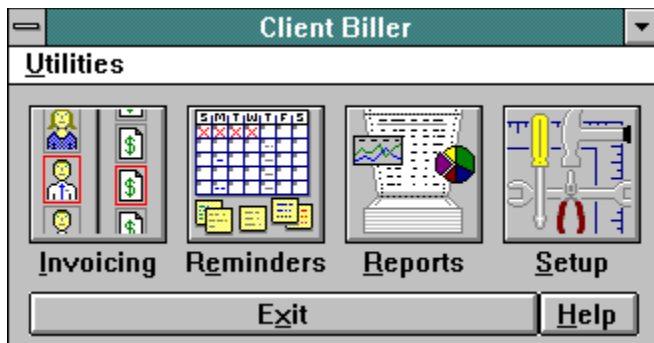
Invoicing   Reminders   Reports   Setup

Click on a topic for more information.

Technical Information

Client Biller's creation
Client Biller was created with Microsoft's Visual C++ 1.0 and 1.5.   Version 2.1 stands at about 12,000 lines of straight C code (not including resources).

Client Biller was written for NEW Software by James Bell (internet: newsw@netcom.com)

Help file
This help file was originally created by Arthur Muller (internet: muller@fwi.uva.nl), and rewritten by James Bell for NEW Software.

Database Files
There are 5 database files maintained by Client Biller: INVOICES.DB, CLIENTS.DB, CHARGES.DB, SCHARGES.DB, and REMINDS.DB.

All records are fixed-length.   The files will be created as needed if any or all are deleted. CHARGES, INVOICES and CLIENTS are linked and INVOICES and CHARGES should be deleted if either one is lost (CLIENTS can remain).

By default these files are kept in the Windows directory.   If they are moved, you should change the entries for them in the CBILLER.INI file.

Report Limits
The Monthly report is limited to a span of 5 years and 3000 invoices.
The Client report is limited to 200 clients and 3000 invoices.
The Invoice report is not limited by number of clients or invoices.
All text reports are limited to 150K of text total (about 1800 lines).
The Monthly Invoice graph is limited to 10 years of data.

Database Limits
The following are the size limits on the length of fields in the database.   Most fields are zero-terminated ASCII strings.   "Amount" and "Hourly Rate" are floating point values from -3.4 x 10^{38} to +3.4 x 10^{38}.   The Reminder database dates are binary.

Client Database Field	Len	Invoice Database Field	Len	Charge Databases Field	Len	Reminder Database Field	Len
Contact Name	40	Date	8	Description	262	Set Month	1
Company Name	40	Invoice Number	8	Amount	4 (num)	Set Day	1
Address #1	40	No-Print Comment	90			Set Year	2
Address #2	40	Printed Comment	320			Last Seen Month	1
City	22					Last Seen Day	1
State	2					Last Seen Year	2
Zip	10					Reminder Type	1
Phone #1	16					Type Data1	1
Phone #2	16					Type Data2	1
Fax Phone	16					Reminder Text	301
Notes	2038						
Hourly Rate	4 (num)						

Reserved   6

Other Programs from NEW Software

Surf - The WAV Audio Toolbox for Windows
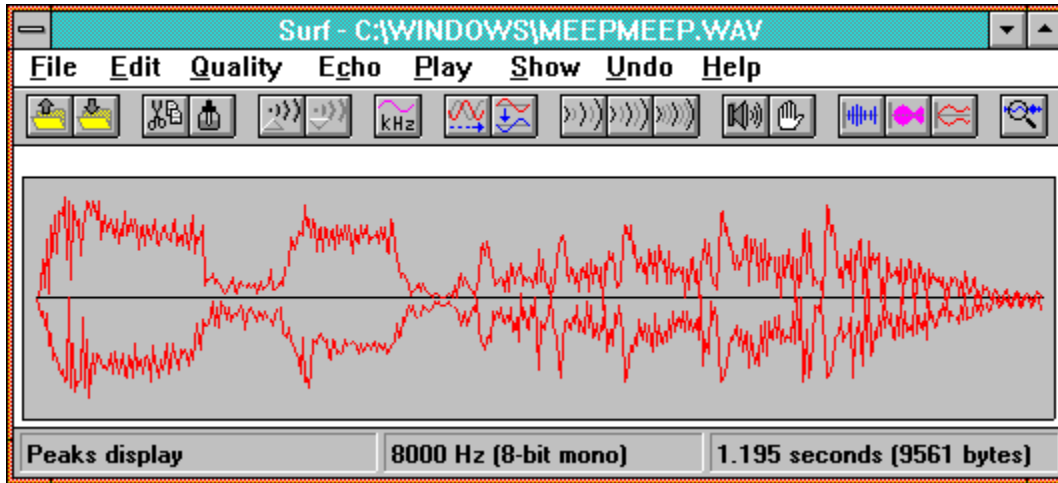
An incredible selection of effects for your Windows WAV files, including:

5 levels of echo	Chorusing	Inversion
Playback control	Cut and paste editing	Smoothing
Hiss control	Phaser	5 WAV viewers
Gain control	Sample rate control	Undo/Redo

All this and much more wrapped up in a user-friendly toolbar.

Statline - The Ultimate Windows Status Line

Statline is the status line for Windows 3.1 and Windows NT, capable of displaying the date, time, amount of memory free, percentage of "system resources" free, and hard drive space free.

Statline goes a step further by providing a program launcher, a small menu for often-used programs, a small notepad, printer control, and a quick exit out of Windows.

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Second Notice

Check the 2nd Notice box to stamp the invoice with a payment reminder.

Add

The Add button copies the charge description and amount you are working on and makes it one of
your Standard Charges.

Amount

The Amount is where you enter the total for that charge.   Do not type a
"$" (dollar sign) or other non-numeric characters in this field.

If your client has an Hourly Rate set, you can click the
arrow to select from a list of times.   Client Biller will multiply the time
you select by the Hourly Rate for the that Client.

Apply

The Apply button copies a Standard Charge to the charge you are working on.

Auto-numbering

The Auto Numbering selection lets you tell Client Biller how you keep
invoice numbers.   If you keep a different sequence of numbers for each
Client, select "Separate sequences for each client".   If you keep a single sequence
for all your invoices, select "One sequence for all clients".

Calculator

The Calculator button brings up the Windows Calculator for computing the amount of the charge.   Anything that appears in the Calculator's Window will be copied to the Charge Amount window in Client Biller.

Charge description

The Charge Description is a few lines of text (about 260 characters) to describe the charge.   You can tell Client Biller to indent the 2nd, 3rd, etc. lines of each charge if you prefer.
(See: Invoice Options)

Charges

Charges are the list of individual amounts and descriptions that make up the total invoice.   If you enter a charge with an amount of 0, the amount will be dropped and only the description will print.   You can enter an amount of 0.001, and 0.00 will print.

Client Report

The Client Report shows all the invoices selected with totals for each Client that has at least one invoice in the selection.

Dial

Clicking on Dial will let you dial the selected Client's phone number (if you have a modem).   Simply select a Client, hit Dial, and then select the phone number that you'd like to dial.

Envelope

When you click on the Envelope button you can print an envelope addressed to the selected Client.   In general this works best if you have a page printer (Laser, Inkjet or Bubblejet).

Copy

Clicking the Copy button will copy the Client's name and address to the clipboard.   If you're writing a letter in a word processor, you can just select Edit...Paste to insert the address text in the heading.

Edit Client

Clicking the Edit Client button will bring up a window to let you enter information about your Client.
This information will let you address invoices and envelopes, dial the phone and reference invoices.

□ Company information
□ Notes
A Hourly Rate

Company information

The Company information is what will be printed at the top of any invoices or envelopes for this Client.   You can enter either a company name, a contact name or both.   There is also space for the address and 3 phone numbers.

Hourly Rate

The Hourly Rate field is a way (it is optional) to bill clients easier.   By filling in the clients hourly rate here, you can then simply use the drop-down list for amounts when filling out a charge.   That list will have: 1 hour, 2 hours, 3 hours, etc. and Client Biller will multiply the Hourly Rate by the time you pick.   See Also: Amount

Notes

The Notes area lets you keep several lines of notes (about 2000 characters) about the Client.

New Client

Clicking the New Client button will bring up a window to let you enter information about your Client.   You can click Edit Client to change the information later if you need to.

See Edit client for more information

Delete Client

Clicking Delete Client will erase any information about the selected Client, **including all invoices you've made for that Client**.   You'll see a warning message before any erasing is done.

Company information

This is where you enter the information about yourself to be printed at the top of each invoice.

For multiple company settings, see also: Multiple Companies

Copies

You can tell Client Biller to print several copies of the invoice at once.

Date

The Invoice Date is the date you'd like to be printed on the invoice.

Date Mailed

The Date Mailed is a field for your use to show when the invoice was sent. It is not printed or used for sorting or selecting invoices.   It will be used in future versions of Client Biller to estimate future cash flow.

Delete charge

Delete charge will erase the selected charge from the invoice.

Delete invoice

Delete invoice will erase all the information about the selected invoice, including all the charges for that invoice.   You'll see a warning message before any erasing is done.

Delete

The Delete button deletes the Standard Charge you have selected.

Dial Prefix

If you have an office phone where you must dial number(s) to get an outside line (e.g. "9"), type those numbers in here.   You can enter a comma to add a delay.   For Example, "9," would mean dial 9 and wait a moment before dialing the Client's number.

Duplicate Charge

Duplicate Charge will add a second copy of the selected charge to the invoice.

Duplicate invoice

The Duplicate Invoice button will make a copy of the entire selected invoice, including all the charges on it.   Client Biller will use the next invoice number in sequence.

Edit charge

The Edit Charge window is where you can change the description and amount for each charge on the invoice.

[A] Charge description
[A] Amount
[A] Calculator
[A] Standard Charge

Standard Charge

Standard Charges are charges that you might use again, like "Initial Consultation, $45.00". You can take any charge and add it to your list of Standard Charges and then Apply it over and over to any invoice.

There will always be 3 tax standard charges to let you insert a charge for various taxes. The amount of the charge is the sum of all the charges marked taxable multiplied by the tax rate given in the Client Biller Setup...Invoice Options.   See also: Taxes

[A] Charge description
[A] Amount
[A] Standard Charges List
[A] Calculator
[A] Apply
[A] Add
[A] Delete

Standard Charges List

The Standard Charges list shows each of the Standard Charges you have saved in the past.   Simply click the arrow to display the list, then select the charge you want to use and hit the Apply button.

To add a charge to your Standard List, type the charge and amount and click the Add button

Edit invoice

The Edit Invoice window is where you enter information about the invoice and the charges to be listed on the invoice.

There are areas for the invoice number, date, and Paid/Unpaid status.   There's also an area for the charges on the invoice.   This shows the first few characters of the charge and the amount.

Simply double-click on a charge to edit it, or select the charge and hit the Edit Charge Button.

[A] Charges
[A] Edit charge
[A] New charge
[A] Delete charge
[A] Duplicate
[A] Move up/Move down
[A] Total
[A] Notes (printed)
[A] Notes (private)
[A] Date
[A] Number
[A] Date Mailed
[A] Paid
[A] Print
[A] Edit client
[A] Dial client

Total

The Total shows the current total of all the charges for this invoice.

Number

The Invoice Number can be up to 8 digits or letters to identify the invoice.
Client Biller will not stop you from using the same invoice number twice.
You can tell Client Biller   to automatically generate invoice
numbers for you. (<u>See: Setup</u>)

Paid

Here you can check or uncheck the Paid box to mark an invoice as paid.   You can later use this to report on only the invoices that have (or have not) been paid.

Notes (printed)

Printed Notes are a few lines of text (320 characters) that will print at the bottom of the invoice.

Notes (private)

Private Notes is a line (90 characters) of text that you can use for comments about each invoice.   This is not printed on the invoice.

Print

The Print button will show you a preview of what the first page of the invoice will look like when printed.

 Copies
 Printers
 Second Notice

Printers

You can tell Client Biller to print this invoice to any of the available printers.   This will not change the printer you have selected to use as your default printer.   This is handy for sending a fax of the invoice or printing invoices on a different printer than you usually use.

Client Biller will remember your printer selection in the future.

New charge

The New Charge window lets you enter several charges at once for the invoice.

After typing each description and amount, click "OK" to add the charge.
When you're finished click "Close" to stop adding new charges.

See Edit Charge for more information

Move up/Move down

Move Up and Move Down will move the position of the selected charge up or down on the list of charges.

Envelopes

This lets you select whether Client Biller defaults to printing a return address on the envelope or not.   No matter what you select here, you can override it for each individual envelope.

Export

Export Invoice(s) lets you export either a single invoice (to text) or all the invoices (to a dBase file).

[A] Export type
[A] Filename

Export type

The Export Type lets you select how to export the invoice.

The Single Invoice to Text button means you'd like to export the selected invoice to a text file.

The All Invoices to DBF file button means to export all your invoices to a dBase III type file.

Filename

This is where you enter the filename you would like to create, either a text filename (like "JUNE.TXT") or a dBase filename (like "INVOICES.DBF").

From/To

The From and To fields let you select a date range to select invoices from.
Any invoice that falls on or within this range may be part of the selection.

Heading Note

The Heading Note is a short note (40 characters) to print below the heading on each invoice.

Indent Charges

Indent Charges means to indent all but the first line of each charge.

Invoice Report

The Invoice Report shows a simple list of the selected invoices with a total at the bottom.

Invoice Listing

The Invoice Listing will let you display either the Client's name or the invoice total when you are selecting from your list of invoices.   The invoice total option will slow down the listing a bit.

Invoice Options

Invoice Options lets you set options for printing and working with invoices.

[A] Auto-Numbering
[A] Heading Note
[A] First Invoice Page
[A] Date Format
[A] Indent Charges
[A] Taxes
[A] Fonts

Date Format

This lets users outside the US select to use DD/MM/YY dates in most places.

Note:
You will still have to use MM/DD/YY format in Report selection dates, and you will see dates listed as YY-MM-DD in the invoice listing.

First Invoice Page

There are three choices that affect the first printed invoice page:

- You can simply start the invoice at the top of the page.
- You can leave a 2 inch margin for your pre-printed letterhead paper.
- You can select a bitmap to print above the invoice (like letterhead).

If you select to use a bitmap, you can then click on Browse to select a bitmap file to use.   You can also scale the bitmap and/or place it at the left, center, or right side of the page.   Client Biller will fill in the scales by default with the proper aspect ratio.

Invoicing

The Invoicing Overview is where you work with Clients and Invoices.

First you select a client from the list on the left (or New to create a new client), then the buttons for working on that client will light up.   The invoices for that client will also appear on the right.

When you click on an invoice, the buttons for working on that invoice will light up.

Clients
[A] Edit Client
[A] New Client
[A] Delete Client
[A] Dialing Clients
[A] Printing Envelopes
[A] Copy Client Information
[A] Find Client
[A] Export Clients

Invoices
[A] Edit Invoices
[A] New Invoice
[A] Delete Invoice
[A] Print Invoice
[A] Export Invoice(s)
[A] Duplicate Invoice
[A] Purge Invoices

Note:
If you have not registered, you'll only be able to setup three clients and eight invoices - you should easily be able to tell if you like Client Biller with this small limitation.   You can register with a single phone call and immediately get your license number which will allow you to have as many clients as you wish.   There are no functional limitations in an unregistered copy of Client Biller.

New invoice

The New Invoice button creates a new invoice for the selected client, then you can begin editing the invoice.   See also: Edit Invoices

Purge

Purge Invoices lets you erase a whole range of invoices all at once.

Use Caution!   There is no way to unerase the invoices once they are gone.

🅰 From/To
🅰 Paid/Unpaid/Both
🅰 Preset Dates

Find Client

Click on <u>Find</u> and type all or part of a client name or company to select that client.

Paid/Unpaid/Both

The Paid/Unpaid/Both lets you select only invoices that have (or have not) been paid.   The invoices still must fall in the date range you selected above.

Preset Dates

The Preset Date Range buttons will simply type in some of the more common dates for you in the From and To fields.

License Information

This is where you enter your Client Biller License when you register Client Biller.

See also: <u>Shareware</u> and <u>Registering</u>

Modem Port

If you have a modem and want to be able to dial your Clients, select which COM port your modem uses.

Monthly

The Monthly Report shows all the invoices selected with totals at the end of each month in the date range.

Export Clients

This allows you to export your clients address information to a DBF (dBase III) file for use elsewhere (e.g. a mailing list).

Reports

The Reports window lets you select certain invoices and report types for summary information about your invoices.

[A] From/To
[A] Paid/Unpaid/Both
[A] Preset Dates
[A] Invoice
[A] Monthly
[A] Client
[A] Monthly Invoices Graph
[A] Taxes Report

Monthly Invoices Graph

The Monthly Invoices graph shows all the invoices selected for each month in a graphical format.

Taxes Report

The Taxes Report shows all the taxes accumulated in all the invoices in the date range selected.

Reminders

The Reminders Calendar window shows a perpetual calendar and lets you keep any number of reminders for each day.   Simply click on a day to show the reminders for that day or to add new reminders.

You can be reminded about these events each time you start Client Biller, and you can select how far in advance you would like Client Biller to check for upcoming events (1 day, 3 days, 10 days, etc.).   See: Setup.

Working With Reminders

After clicking on a day there will be a list of reminders for that day.   If there are reminders already set for that day, you can Edit them, Move them to another day, or Delete them.

You can add new reminders for that day by clicking on the New button.

Click on the To Do button to print a check list of the reminders for that day.

Editing/Adding New Reminders

You can edit a reminder (or add a new one) by selecting a Remind on... type and then typing in the text for the reminder. You have room for 300 characters in the reminder text.

There are eight type of reminders to specify when to have the reminder appear:

This Date Only   Applies only to one particular date
N-th *N*-Day of each month   Applies to one day in every month
Daily   Applies every day
Weekly   Applies once per week on this day of the week
Monthly   Applies once per month on this day of the month
Yearly   Applies once per year on this date and month
Every *N* Months   Applies on this date every *N* months.
Every *N* Days   Applies every *N* days.

The colors for the reminder types appear on the calendar and denote the frequency of the reminder (darker colors for more frequent events, lighter for less frequent).

Move Reminder

If an event date changes, you can move the reminder for it to another day.   Simply click on <u>Move</u> and you can specify what day the reminder should be moved to.

Note:
Moving a reminder changes its *base* date.   Suppose you set a reminder to pay the mortgage every month on the 27th.   Changing the base date of this reminder changes it for **every** month, so if you move it to, say, the 25th, all the following months will also have this reminder appear on the 25th.

Delete Reminder

Click on <u>Delete</u> to remove a reminder.   If the reminder applies to more than one day, you will be asked to confirm the removal.

Taxes

You can use taxes in Client Biller by doing the following:

1. Go into Setup and set your local rates under Tax Rate for each type of tax.
2. Check Most items are taxable if you want Client Biller to mark charges as sales-taxable by default.
3. When creating invoice charges select a tax (if any) to apply.
4. At the end of the invoice, apply one of the first Standard Charges (Taxes).
5. Client Biller will sum up the taxable items and apply your tax rate to them.

Setup

The Setup window lets you set some of the general options for Client Biller and tell Client Biller information about yourself and/or your company.

[A] Company Information
[A] License Information
[A] Automatically start in Invoicing
[A] Check Reminders
[A] Modem Port
[A] Dial Prefix
[A] Use Sounds
[A] Envelope Printing
[A] Envelope Feed

[A] Invoice Options

Automatically start in Invoicing

Check this box to move into the Invoicing section as soon as you start Client Biller.

Multiple Companies

To setup Client Biller for more than one company, simply place separate copies of Client Biller in two separate directories.

If you are splitting an existing copy of Client Biller into two companies, be sure you *do not* copy the CBILLER.INI file into both directories.   You *may* copy the DB files to those directories.   If you do not copy the DB files, you will be starting that company fresh with no clients or invoices.

Start each copy of Client Biller and fill in your company information.

Client Biller will look for its database files in the Windows directory by default, so use Notepad to edit the CBILLER.INI file and change the locations of the DB files to the same directory as the EXE file for that company.

Now you have separate copies of Client Biller that will not interfere with each other.

If you *do not* edit the INI file and change the DB paths, you will have two (or more) companies sharing the same invoices, clients, etc.   You can also change only some of the DB paths and share (for example) clients and reminders, but have separate invoices for each company.   Finally you can mix and match shared/seperate databases among three or more companies and really make a total mess of it all.

Check Reminders

You can select how many days (if any) you would like to have Client Biller check in advance for reminders.   1, 2, or 3 days is recommended.

Reminder Notice

Client Biller will notify you about upcoming reminders.   You can turn this option off or change the number of days in advance Client Biller will check in <u>Setup</u>.

[A] Edit Reminder

[A] Move Reminder

[A] Reminder Calendar

Use Sounds

If you have a sound board on your machine, you can turn on Client Biller's sounds.

Select 'Print Topic' from the File menu to print the order form
or press CTRL+INS to copy the form to the Clipboard
and paste it into a text editor or wordprocessor

Allows you to set the envelope size and paper bin for your printer.
The default is: Manual Envelope, Common #10, and Landscape.

Allows you to set the typefaces used in invoices and envelopes.

Edit Charge

<Edit charge>

Edit client

<Edit Client>

Other software from NEW Software
<Other Software from NEW>

Registering

<Registering>

See: Setup
<Setup>

Setup

<Setup>

Shareware

<Shareware>