Customers Quotes & Invoices

Table of Contents

Customer Topics

Quote Topics

Invoice Topics

Invoices
Invoice List
Adding an Invoice
Modifying an Invoice
Deleteing an Invoice

Customers

CQI is based on customers quotes and invoices. Before a quote or invoice is created the user must define one or more customers. All the details required by the system for a customer can be entered when adding a customer.

The Customer List

When selecting Customer from the main menu, the customer list screen is displayed. This screen contains a list of all customers that have been entered into the system. The list displays the unique customer number and the associated customer name. The number of customers is unlimited, however the list can only hold up to 500 customers at one time so the customer range combo box at the top right of the screen allows the user to select a different range of customers. It may be difficult to find a specific customer by browsing the lists, but the user can search for a customer by name or by the unique customer number assigned when the customer is added to the system.

Adding a Customer

To add a new customer to the system the user must select the ADD button on the customer listing screen. Selecting the ADD button will display the Customer Details screen. On this screen the new customer is assigned a unique customer number and the user can enter the required customer details. When all details for the customer have been entered, select the OK button and the system will save the new customer. Selecting the CANCEL button will exit the screen without saving the new customer.

Modifying a Customer

There may be a time when the details for a customer change. To modify a customers details, select the customer to be modified from the list of customers and then select the MODIFY button. Selecting the MODIFY button will display the Customer Details screen filled with the current details of the selected customer. The user can then make any changes required and select the OK button to save the changes to the system. Selecting the CANCEL button will exit the screen without saving the changes to the customer.

Searching for a Customer by Name

If the user wants to find a customer a search by customer name can be used. To do a search by name, enter in the first few letters of the name in the edit field next to the Search for Customer button and select the Search for Customer button. The system will then search its database for the required customer name and if found the system will select the customer in the customer list. This search is case sensitive. If the search is not successful the hour glass will return to an arrow an the customer selection will not change.

Searching for a Customer by Unique Customer Number

If the user knows the unique number of a required customer the search by number function can be used to find the customer. Enter the required customers unique number in the edit field next to the Search by Number button and select the Search by Number button. The system will then search its database for the required customer number and if found the system will select the customer in the customer list. If the search is not successful the hour glass will return to an arrow an the customer selection will not change.

Entering Customer Details

When the user adds or modifys a customer the customer details screen is displayed. At the top left of the screen the unique customer number is displayed. The user can enter or change the following detail for a customer.

Contact Phone Number
Contact Fax Number
Customer Name
Contact Name
Customer Address

The user may print the customer details at any time by selecting the PRINT button. The user may also print an envelope addressed to the customer by placing an envelope in the printer and selecting the Print Envelope button. Selecting the OK button will save the details on the screen for that customer. Selecting the CANCEL button will exit the screen and no save anything.

Quotes

Once one or more customers have been defined the user may create a quote for a customer. When a quote is created it is assigned a unique quote number and is assigned to the selected customer. The quote will remain in the system and if the can be used to generate an invoice if required.

The Quote List

Selecting Quotes from the main menu will display the quotes list screen. This screen will display nothing until the user selects a customer from the customer list. To select a customer open the drop down customer list under the customer name and select the required customer. The customer range combo box can be used to select from different ranges of customers. Customers can also be found by using the search for customer by name function and the search by number function.

When a customer is selected a list of all quotes created for that customer will be displayed in the list box under quote name. The list will show the unique quote number assigned to the quote, the short description for the quote and the amount in dollars quoted on the quote. If a particular quote number is required to be found the search by quote function will find it. Quotes can be added, modified, and deleted.

Adding a Quote

To add a quote the user must first select the customer for whom the quote is to be generated, from the drop down customer list on the quote list screen. Once a customer has been selected, select the ADD button. This will display the quote details screen. On this screen the new unique quote number is displayed in the top left corner of the screen and the customer name is displayed beside it. When adding a new quote, todays date is automatically enter in the Quote Date edit field, and the valid until date is automatically calculated for 14 day later and entered into the Valid Until Date edit field. These date can be modified at any time. The user can now enter the amount of the quote in dollars and cents and enter a short description of the what the quote is for. The user can also enter the Quote Details which is generally a detailed description of what the quote is for.

The quote can be printed immediately and as many time as required by selecting the PRINT button. What is printed on the quote other than the details from the Quote Details screen, can be defined in the System Setup screen displayed when selecting Setup from the main menu. If the optional footer is required to be printed with this quote, select the check box labelled Enable Footer at the bottom left of the screen. If the user requires an envelope addressed to the customer, insert an envelope into the printer and select the Print Envelope button. When the user is finished added details and printing the new quote, select the OK button to save the quote to the system. The user may exit the screen without saving anything by selecting the CANCEL button.

Modifying a Quote

To modify a quote the user must first select the customer from whom the quote is to be modified, from the drop down customer list on the quote list screen. Once a customer has been selected, select the MODIFY button. This will display the quote details screen. On this screen the unique quote number is displayed in the top left corner of the screen and the customer name is displayed beside it. When modifying a quote, the date the quote was created is displayed in the Quote Date edit field, and the valid until date is displayed in the Valid Until Date edit field. These date can be modified at any time. The user can modify the amount of the quote in dollars and cents and modify the short description of the what the quote is for. The user can also modify the Quote Details which are generally a detailed description of what the quote is for.

The quote can be printed immediately and as many time as required by selecting the PRINT button. What is printed on the quote other than the details from the Quote Details screen, can be defined in the System Setup screen displayed when selecting Setup from the main menu. If the optional footer is required to be printed with this quote, select the check box labelled Enable Footer at the bottom left of the screen. If the user requires an envelope addressed to the customer, insert an envelope into the printer and select the Print Envelope button. When the user is finished modifying details and printing the quote, select the OK button to save the changes to the quote to the system. The user may exit the screen without saving anything by selecting the CANCEL button.

Deleting a Quote

To delete a quote the user must first select the customer for whom the quote is to be deleted, from the drop down customer list on the quote list screen. Once a customer has been selected, select an existing quote to be deleted from the list of quotes for that customer. Now select the DELETE button. This will display a Delete Warning Message Are you sure ? to which answering YES will delete the selected quote, and if there is an invoice that uses the quote a Invoice Being Deleted message will be displayed. When a quote is deleted it will be removed from the list of quotes for that customer. Once a quote is deleted, its quote number will never be used again.

Invoices

Once one or more customers have been defined and the user has created a quote for a customer, an invoice can be generated using the quote. When an invoice is created it is assigned a unique invoice number and is assigned to the selected customer. When creating an invoice the user is able to select from a list of quotes for the customer to fill in the details of the invoice. The invoice will remain in the system after being created and printed. The invoice and will then be included in calculations that generate reports. The system will keep track of overdue invoices and monthly total billings. When the invoice has been paid by the customer the user must stamp the invoice paid so the system can track overdue invoices.

The Invoice List

Selecting Invoices from the main menu will display the invoice list screen. This screen will display nothing until the user selects a customer from the customer list. To select a customer open the drop down customer list under the customer name and select the required customer. The customer range combo box can be used to select from different ranges of customers. Customers can also be found by using the search for customer by name function and the search by number function.

When a customer is selected a list of all Invoices created for that customer will be displayed in the list box. The list will show the unique invoice number assigned to the invoice, the short description for the invoice, the order number if the customer gave one, its over due status in days and the amount in dollars invoiced. If a particular invoice number is required to be found the search by quote function will find it. invoices can be added, modified, and deleted.

Adding a Invoice

To add a invoice the user must first select the customer for whom the invoice is to be created, from the drop down customer list on the invoice list screen. Once a customer has been selected, select the ADD button. This will display the invoice details screen. On this screen the new unique invoice number is displayed in the top left corner of the screen and the customer name is displayed beside it. When adding a new invoice, todays date is automatically enter in the Invoice Date edit field. This date can be modified at any time. The user can now enter order number if the customer supplied one. Now the user should select an existing quote that has the details for the new invoice. The quote selection drop down combo box has a list of all quotes generated for the selected customer. Selecting a quote from the list will fill the invoice details, the short description and the invoice amount with information from the quote.

Now the user can make any required changes to the invoice details and the total cost to be invoiced. The invoice can be printed immediately and as many time as required by selecting the PRINT button. What is printed on the invoice other than the details from the Invoice Details screen, can be defined in the System Setup screen displayed when selecting Setup from the main menu. If the optional footer is required to be printed with this invoice, select the check box labelled Enable Footer at the top of the screen. If the user requires an envelope addressed to the customer, insert an envelope into the printer and select the Print Envelope button. When the user is finished added details and printing the new invoice, select the OK button to save the invoice to the system. The user may exit the screen without saving anything by selecting the CANCEL button.

Modifying and Invoice

To modify an invoice the user must first select the customer for whom the invoice is to be created, from the drop down customer list on the invoice list screen. Once a customer has been selected, select an existing invoice for that customer from the list box and then select the MODIFY button. This will display the invoice details screen. On this screen the new unique invoice number is displayed in the top left corner of the screen and the customer name is displayed beside it. When modifying an invoice, the date that the invoice was created is displayed in the Invoice Date edit field. This date can be modified at any time. The order number, total cost and the invoice details can also be modified. If the user wants to select a different quote to use for the invoice, it can be selected from the quote selection drop down combo list box.

The modified invoice can be printed immediately and as many time as required by selecting the PRINT button. What is printed on the invoice other than the details from the Invoice Details screen, can be defined in the System Setup screen displayed when selecting Setup from the main menu. If the optional footer is required to be printed with this invoice, select the check box labelled Enable Footer at the top of the screen. If the user requires an envelope addressed to the customer, insert an envelope into the printer and select the Print Envelope button. When the user is finished added details and printing the modified invoice, select the OK button to save the changes to the invoice to the system. The user may exit the screen without saving anything by selecting the CANCEL button.

Deleting an Invoice

To delete an Invoice the user must first select the customer for whom the invoice is to be deleted, from the drop down customer list on the invoice list screen. Once a customer has been selected, select an existing invoice to be deleted from the list of invoices for that customer. Now select the DELETE button. This will display a Delete Warning Message Are you sure ? to which answering YES will delete the selected invoice. When an invoice is deleted it will be removed from the list of invoices for that customer. Once an invoice is deleted, its invoice number will never be used again.

Overdue Accounts

Once an invoice has been created, the system will keep track of how many days overdue the invoice is. The user can generate a report of overdue accounts, by selecting OverDueAccounts from the main menu, then selecting the required print button. Invoices fall into four categories,
1. Not overdue
2. Overdue by 30 days or more
3. Overdue by 60 days or more
4. Overdue by 90 days or more

When a print button is selected the system will print a report that shows overdue invoices by customer. All relevant information about each overdue invoice will be printed.

Monthly Reports

It is possible to produce for any month of any year a report that shows the total amount invoiced for the month and the amount paid of the total invoiced. The report shows by customer the total invoiced and the total paid and then the totals for the month. This report can be run as many time as the user likes. The report will take some time to generate in a large system.

System Setup

The system setup screen allows the user to enter company details and other infomation used by the system when printing quotes and invoices. Fill out the screen with the desired details and select th OK Button to save the changes to the system. It is a good idea to print a quote and an invoice to see how the information is displayed and then make any final modifications. Here is a brief description of what each item is used for.

Company Name This is the name of your company to be displayed in large bold letters at the top of all quotes and invoices.

Company Moto If your company has a moto enter it here.

Company Address   This is the address of your company to be displayed on all quotes and invoices.

Phone Numbers Your company contact phone numbers to be displayed on all quotes and invoices.

Fax Numbers   Your company fax numbers to be displayed on all quotes and invoices.

Company Number   This is for your company number if you have one. i.e. ACN

Quote Statement   This is allows you to put a statement before the quote details.

Quote Boxed Footer This footer will be displayed in a box at the bottom of a quote.

Invoice Statement   This is allows you to put a statement before the invoice details.

Optional Footer This is an optional footer that will be displayed on all quotes and invoices.

Static Footer   This is the last line on all quotes and invoices.

CQI Shareware Registration Notice

This is a shareware version of CQI. The shareware distribution gives users a chance to try the software before buying it. If you try the CQI shareware program and wish to continue using it, you are expected to register with the author. When you register, you will get the latest version of the software with a printed manual. The Shareware version of CQI has been limited, such that that user can only enter up to 5 Customers and only produce 20 Quotes and 20 Invoices. The latest version of the software will allow unlimited Customers Quotes and Invoices,(limited only by disk space). The latest version is not a shareware program, thus there will be no references to shareware in it. When you register, you will also receive notifications when the next major versions become available and receive free technical support.

Grant

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Final Word

On a lighter note, this is a shareware program that should be used to evaluate the potential of CQI. Please evaluate the software and show it to your friends and business associates. The program is aimed at making the long winded task of quoting and invoicing customers, a simple refined process that will give your customers a professional impression. The software will also allow you to keep track of your monthly invoicing and overdue accounts.

Feel free to pass on a copy of the software to anyone who would like to evaluate it.

The program has been proven in the real world over the past few years, and it has a great track record. If you feel the software can help your business please complete the registration form and return it to Angus Hatton. For the small price of the registration you will not be disappointed.

Regards,

Angus Hatton

CQI ORDER FORM

Angus Hatton   From: _____
P.O. Box 92
Fremantle   Address: _____
W.A.
AUSTRALIA   _____
6160

_____

Date: _____

E-Mail/Internet/CIS ID: _____

Phone #:   (_____)_____

Please forward _____ copy/copies of CQI Version 5.0 at a cost of $50 (Australian)

per copy for a total of   (AUS)$_____

Plus Postage / packing / handling

In Australia $5
Outside Australia $10   (AUS)$_____

Total Payment   (AUS)$_____

Payment Method (Please Tick)

__ Cheque   __ Bank Cheque   __ Money Order

Please make cheques/bank cheques payable to Angus Hatton.

Cheques and bank cheques must be made out in Australian Dollars and drawn on an Australian Bank.

Upon receipt of this paid order, a copy of CQI Version 5.0 will be sent.