Invoice Master 2.0

A Business Master Application
by
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Welcome to Invoice Master 2.0. This application and a cash drawer are all you need to turn your Mac into a cash register. Invoice Master 2.0 will process transactions, Print an invoice for each seperate transaction, give you an up to the minute report on sales, give you an accurate end of day sales report, and even subtract transaction items from your inventory if you have Inventory Master 2.0 accompanying this application.

• The Business Master enviornment.

When you launch Invoice Master 2.0 you will be introduced to the Business Master envoirnment. This has been made as close to the Mac enviornment as possible to provide an accustomed feel to the application. When the application is launched, you will be taken to the main or 'Menu screen'. Across the top of the screen is the Business Master menu bar consisting of the Time and date, and two menus. To open these menus simply click on the menu name. The Business Master menus resemble standard Windows (gulp) menus and operate in much the same way. To choose a menu item, simply click on its title. To close the menu without choosing an option, click on the 'Close Menu' option. Most of the options containedin the Business Master menus are echoed in the Hypercard menu 'Invoice'.

When you first launch Invoice Master, it looks for other Business Master applications. If it finds any, it shows the icon of that application along the right side of the screen. This allows you to go directly to the other applications by double clicking on the icon of the application.

• The Options Menu.

The 'Options' menu contains the following items: About Invoice Master, Close out Day, X-Report, Sales Tax, Change Password, Customize Invoice, Help, and Quit. When you open the 'Options' menu, you will be asked to enter a password. This is to protect the functions within the menu from those who do not need to have acces to those functions; much like a manager's key on a cash register. When you first launch the application, there is no password installed, so just press return and the menu will open.

• Change Password.

This will probably be the first option you will want to use. To choose this option, click on 'Change password' in the 'Options' menu. You will be asked to enter, and then to verify a new password. The new password will then be in effect, so it is very important that you write it down and keep it in a safe place. If you get locked out of the system, E-mail me or write to the address given and I will let tell you how to get in again.

• About Inventory Master.

This option takes you to the Program info screen.

• Close out day.

This option is used at the close of the business day to total up your transactions and provide a report on each transaction as well as your net and gross totals, and your totals by payment method. Invoice Master will generate the report and then give you the option to print it. The sales reports are kept in a separate stack, so it is a good idea to keep an unused copy of the Sales reports stack so that you can use a fresh stack for each month or whatever period you use. This way you can keep your reports organized. The easiest way to do this is to expand the 'Sales Reports' stack from the SEA file when you decide to begin a new period. You will then have to re name the old 'Sales Reports' stack for record keeping purposes.

• **X-Report.**
This option gives you an up to the minute report on sales. Invoice Master will generate a report and give you the option of printing it. These reports are not saved by the application.

• **Sales Tax.**
This option allows you to enter a percentage for sales tax, or whatever applicable tax you may have if your state doesn't have a sales tax. You will be asked to enter a percentage rate. Do not use the percentage symbol (shift 5), as Inventory Master already knows that it is a percentage.

• **Customize Invoice.**
This option takes you to the Invoice template. You can use Hypercard's painting tools to customize the appearance of the invoice. WARNING! Do not alter the fields on the template or Invoice Master 2.0 will not work properly.

• **Enter Base Transaction Number.**
This option allows you to set your initial transaction number. You will be asked to enter a base number. For example, if the last transaction number you have used under your old system is 100, you would enter 101 at the prompt. Default for the system is 1.

• **Help.**
This option takes you to the help screen.

• **Quit.**
This, obviously, exits you from the application and returns you to the finder.

• Entering a Transaction.

To enter a transaction, simply click on the button entitled 'New Trans' on the main screen, press Ctrl N or choose the 'New Transaction' option from the Hypercard menu 'Invoice'. You will be given an empty invoice on which you enter the information for that transaction. The cursor will begin in the 'Terms' field. This is where you enter the payment method. You can then tab through the fields, entering the appropriate information as you go. When you have entered the transaction information, press 'Ctrl S' to total the sale. The cursor will then go to the field entitled 'Tendered'. Enter the amount tendered or recieved and press 'Return' and the sale will be finalized. To begin another transaction, press 'Ctrl N'. To return to the Main screen, press 'Ctrl M' or choose 'Menu' from the Hypercard menu 'Invoice'.

• The Search Menu.

The Search menu lets you search for a particular transaction, or a sales report. The menu contains the following options: Search by Date, Search by Inv#, and Search for Report by Date.

• **Search By Date.**
This option lets you search for a transaction by the date it was made. You will be asked to enter the date of the transaction. Use the format mm/dd/yy as that is the only

format Invoice Master will recognize. To go to the next transation for that date, use Hypercard's 'Back' option from the 'Go' menu, or press Ctrl 2. To scroll backwards, use the 'Next' option from the 'Go' menu or press Ctrl 3.

• **Search by Invoice Number.**
This allows you to search for a transaction by its Number. You will be asked to enter the number of the transaction you are searching for. Simply enter the number of the trasaction, and Invoice Master will search for the transaction and take you there.

• **Search for Report By Date.**
This option allows you to search for a Sales Report fromthe Sales Report stack. You will be asked to enter the date of the Report. Again, use the mm/dd/yy format. You will be taken to the report. To get back, click on the button 'Return'.

• The Sales Report stack.

The Sales Report stack has its own built in features which allow you to access reports without using Invoice Master. To search for a report in a stack not currently being used by Invoice Master, Launch the Reports stack containing the report you wish to find. For example, if the sales report you wish to search for is contained in the stack 'Sales Reports- Feb 1994, launch that stack from the finder or use Hypercard's 'Open' command from the 'File' menu. The Search menu, contained on the main screen can then be used to search for a report independently of Invoice Master. The format is the same as the one used in the 'Search' menu of Invoice Master.

• Warranty.

Invoice Master 2.0 and the accompanying Sales Reports stack are presented 'AS IS', niether the author or distributor will accept any liability for the functionability or accuracy of the application.

If you have any comments or questions regarding this or other Business Master products you can write to me at the following addresses:

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Remember, this product is shareware, so if you use it beyond the trial period, please support the shareware concept by registering it. Thank you for using Business Master Software.