# Creating Invoices

he main function of QwikBILL™ is to create invoices. When you are at the Home Window, click on the Invoicing button. You will see this window:

or each client you will see a list of invoices. As you move from client to client the list of invoices will change. Invoices that are paid will also display a “P” at the end of the entry. If you double-click on any of the listed invoices you will be taken directly to that invoice.

If you find that you have not yet created invoices for a client, you can click on the New Client button . You can also edit your client information by clicking on the Edit Client button.

In this example, we will create a New Invoice for Sample Client. The resulting “blank” invoice form is displayed.

he new invoice number, date, and Client Name is already filled-in. The cursor is in the Ship Date: column waiting for your entry. You also have spaces provided for a Purchase Order Number and/or Job Number.

In the central invoice you have spaces to enter up to four items. For most businesses this is more than enough space. If your normal billing requirements call for many entries on an invoice you would want to use the more comprehensive companion products, Bill-IT™ or ShopKeeper Plus™. These programs have many more inventory and billing options. Contact True BASIC for product description sheets and prices on these programs if you find that QwikBILL™ does not offer the level of features you require.

Across the invoice you have three columns. Think of the first column as the Quantity, the second as the Product or Service Description, and the third as the Price.

In this example we want to bill for 12.25 hours of desktop publishing services. The billing rate is $32.25 per hour. The next entry is for materials used and the last item is a mileage charge. One of the great features of QwikBILL™ is the flexibility of what you can enter. Type whatever will fit in the description box and it will be included on the invoice.

hen the entries are complete, click on the CALC button and you will see the amounts calculated and the totals extended.

Click the Shipping button to become familiar with another useful option. Here are the options QwikBILL™ gives you:

f you wanted to add an automatic $5.00 shipping charge to each invoice you would de-select the No Auto Ship option and enter $5.00 in the Fixed Rate box. You can also express shipping as a percentage of the invoice with an opportunity to enter a minimum and maximum amount.

The Memo button displays a window in which you can enter any additional information you would like to have printed in the message area at the lower left section of each invoice. For this example we enter:

ou will notice that your standard Terms are printed under the Message area. The terms are described or modified using the Company Info button after you click the Housekeeping button from the Home Window.

In the upper right corner of the invoice form you will see two buttons. One is Invoice, the other is On Hold. The On Hold option is valuable when you need to submit an estimate or pro forma invoice. This will calculate each entry just as it would on an invoice, but when it is printed it is entitled ESTIMATE instead of INVOICE.

If an estimate is accepted, just click the Invoice button and it will convert this bid or estimate to an invoice. If the specifications or prices have changed you can edit your original estimate and convert it into an invoice with a minimum of re-typing.

You can print a list of On Hold items at any time from within the Reports section to see how many estimates are still outstanding.

## Using the ITEMS List

You can maintain a standing list of Items in QwikBILL™. To do this, click on the Items button at the bottom of the invoice form. You will see a window listing items that have already been described. These items can be either goods or services and carry an inventory number, description, and price. This window also has buttons for New, Edit, Select, or Cancel.

he Items feature of QwikBILL™ is designed to save you a great deal of repetitive typing and at the same time give you maximum of flexibility of what you can enter. To create a New item or Edit an existing entry click on the appropriate button and you will see this item entry form:

he information entered in the Inventory # does not appear on your invoice, but if you type a portion of your Inventory # information in the description area of the invoice and press the Tab key, a match (or near match) will be looked up and what is contained in the Text portion of your standing items entry will be automatically written to the description area of your invoice. You can still overwrite or edit this information on your invoice.

If the first column of your invoice (the Quantity area) is empty, a “1” will be supplied and the price entered multiplied by one. If you place a “0” in the Quantity column, the result will be “$0”.

You will also notice that you can override the default price by typing over the price that is written out from your standing items file. Type in a new price and click on the Calc button and the new amount will be calculated.

When an invoice is completed click on the print button and you will be presented with the standard printing dialog box.

ustomer discounts, levels of pricing, bundles and and dated promotional pricing are beyond the scope of QwikBILL™. Features of this type are found in the Bill-IT™ or ShopKeeperPlus™ products. Contact True BASIC for product description sheets and current prices on these full-featured programs.