Maintaining Client Files

The heart of any business is the customer list. QwikBILL™ maintains a comprehensive file for each client you decide to enter. To enter or edit your list of clients, click the Client File button in the Home Window.

A window will open showing a list of clients and the following selection buttons, Client History, New Client, Edit Client, Print Client List, and Home Window.

ith the Bobby Jones Sports, Inc. entry highlighted, select the Edit Client button and you will see this entry card:

ou can make any changes or additions to the information on this client record and when you are finished click on the Save button at the bottom of the screen. The other choices are Delete or Cancel.

When you have finished editing the client information the Cancel button moves you back to Client Files screen.

Clicking on the New Client button will present a “blank” client card for you to complete. For QwikBILL™ to work properly, the Client ID: entry must be unique for each account and is limited to 12 characters.

ost of the entries choices are self-explanatory. The Tax Sub: entry allows you to specify special tax categories and the three buttons, C.O.D., Credit Card, and Terms show the normal payment expectations for that client. If you have selected C.O.D. or Credit Card and leave an invoice with an “amount due” you will be reminded of the normal terms that have been selected in the Client File.

After invoices have been created you can review a client history by clicking on the Client History button. You will be shown this dialog box which gives you an opportunity to limit the range of the history.

hen you have entered the range of dates and clicked the Continue button you will see the print dialog box. You can choose to print the report to paper or to the screen. To see the report on the screen, click on the Preview button at the lower right.

f you wish to print this report on paper, close the Preview by clicking in the Close box at upper left corner of the screen. This will take you back to the Client Window and you can again click on the Print Client List button. This time, instead of viewing a Preview, you will click on the Print button at the upper right. Check the Page Setup (File menu) before you begin to print so that you will get the results you expect.

his above listing shows the Client History for Bobby Jones Sports, Inc.   You can also print a report showing the information that is contained in each of your QwikBILL™ client files. This is a valuable report that you might want to put in a safe place as a backup record.

When you have completed viewing or printing any of these lists, return to the Home Window and click on the Housekeeper button.

ext select the Company Info button and you will see this Edit Company Info window. The standing items of information which you can enter into QwikBILL™ are easy to change at any time.

nter your standard terms in the Terms: box and any message that you wish to have printed on each invoice in the Message: box. Make the changes that are appropriate for your company and Save.

The Letterhead options allow you to choose whether you want a plain text imprint   (from the information in your Company Information page) or to use a piece of PICT art as your letterhead.   Create your letterhead, save it to the Scrapbook, click on the PICT Letterheads button and paste the PICT art from the Scrapbook. Why the Scrapbook as an intermediate step? Because it solves many possible PICT format inconsistencies.

The Shipping Charges options are explained in the next chapter.