



EasyBilling Software

EasyBilling is a comprehensive sales document management software. It provides a feature-rich environment that allows user to prepare different kinds of sales document, include Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Weight List, Credit Note and Debit Note. User can easily export the document into different formats.

EasyBilling User Guide

Prepared by EasyBilling Development Team
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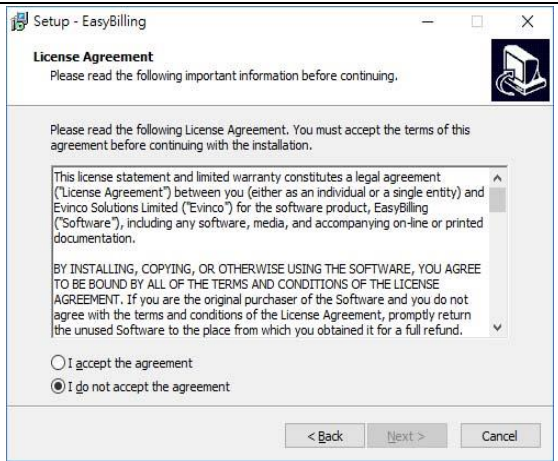
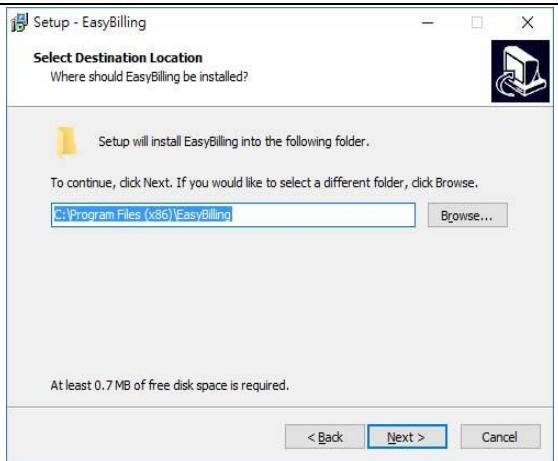
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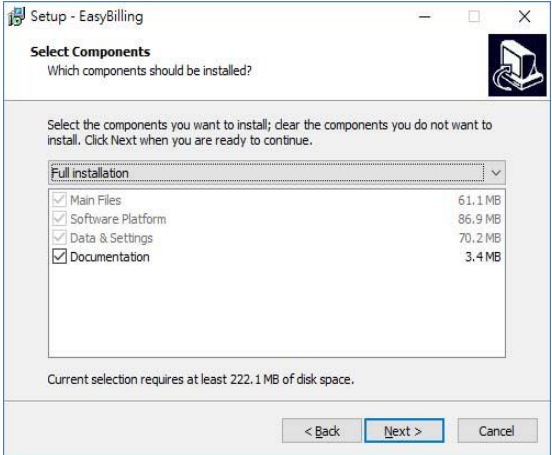
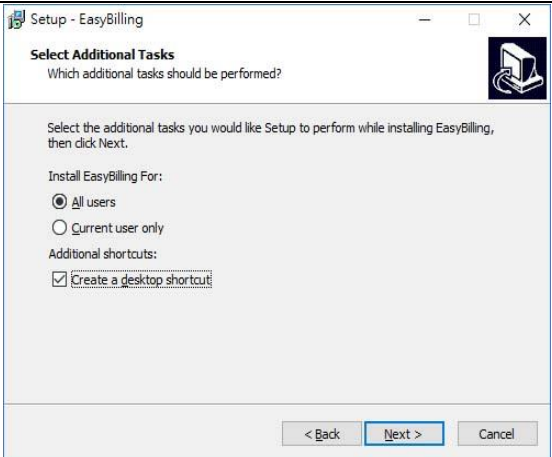
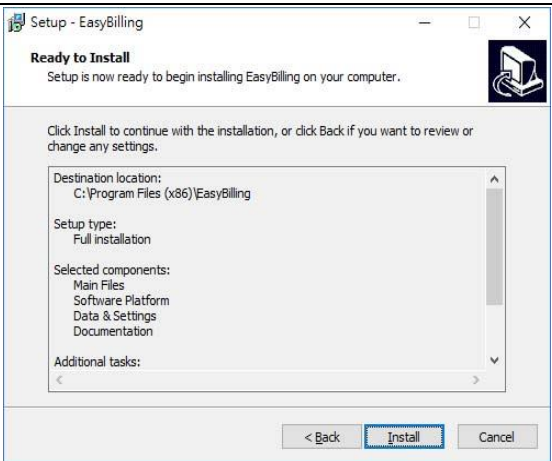
1. SYSTEM REQUIREMENTS

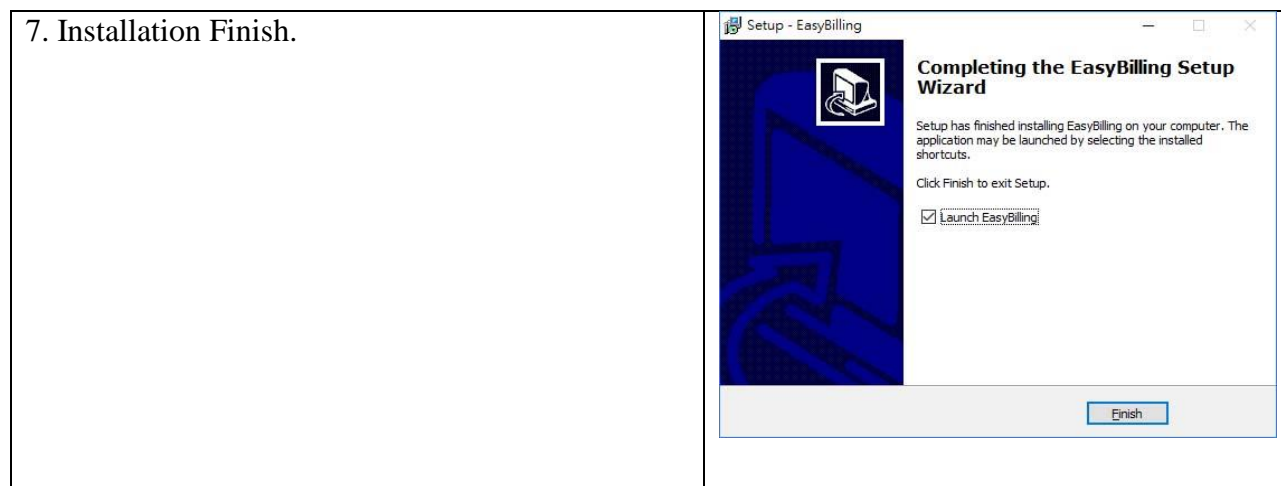
- Operating System:
 - Microsoft Windows 11, 10, 8.1, 8, 7
 - Mac OSX 10.12 or later

2. INSTALLATION FOR WINDOWS

2.1. Install

<p>1. Installation Welcome Screen.</p>	
<p>2. Specify accept the license agreement or not.</p>	
<p>3. Select the destination location.</p>	

<p>4. Select the components to be installed.</p>	
<p>5. Specify installation for all user or current user, and create Desktop Icon.</p>	
<p>6. Start the installation.</p>	

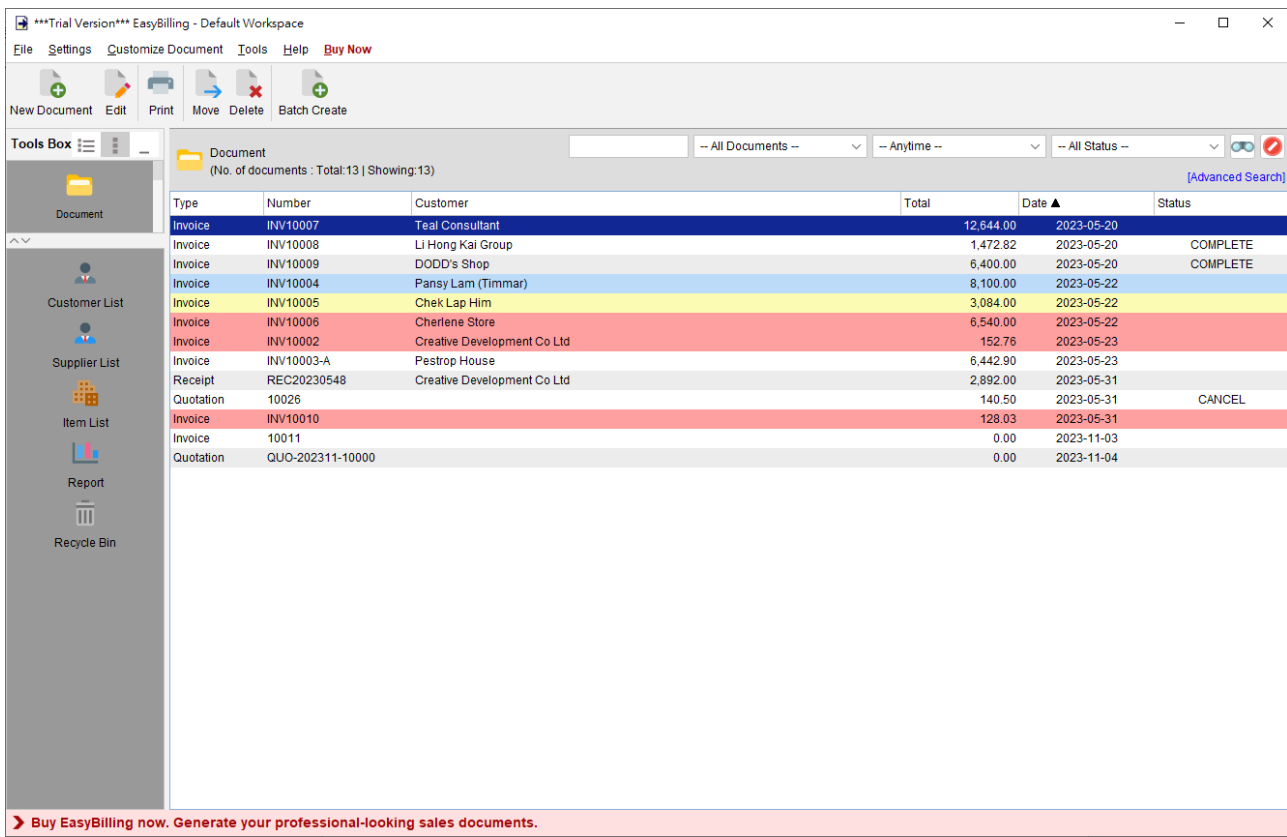


2.2. Uninstall

To uninstall EasyBilling,

1. If you're using EasyBilling, quit it.
2. Click Start, point to "Program Files > EasyBilling".
3. Click "Uninstall EasyBilling".
4. Follow the on-screen instructions. EasyBilling will be uninstalled

3. USING EASYBILLING



The menu bar shown at the top which has five options: File, Tools, Settings, Customize Document, Help. "Buy Now" is available in Trial Version only.

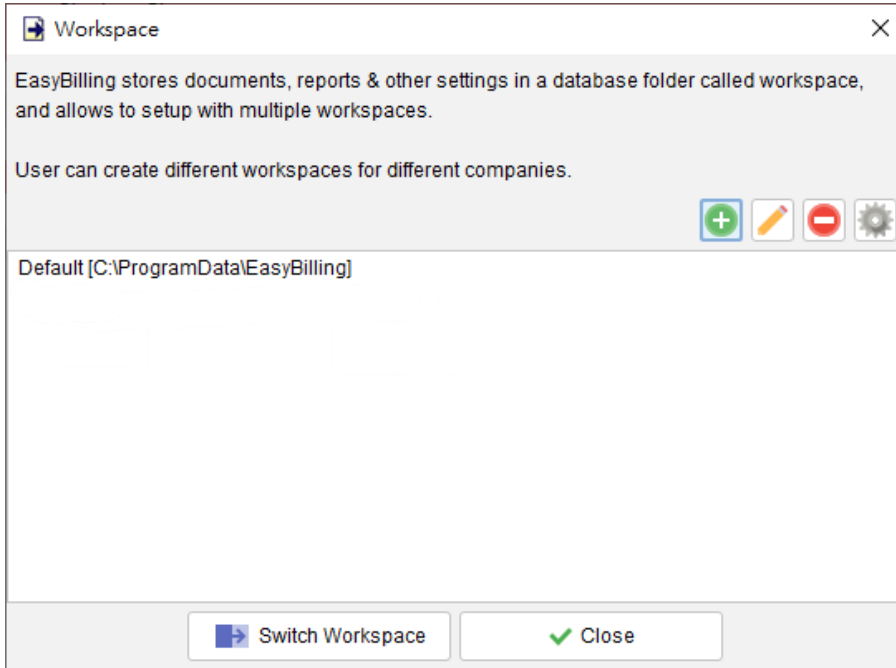
The next is the tool bar, which provides a quick access to some commonly used functions. The tool bar will vary depends on the module shown.

The Tool Box on the left allows you to switch between different modules. At the top, it shows the document folders. Customer List, Supplier List, Item List, and Report are followed.

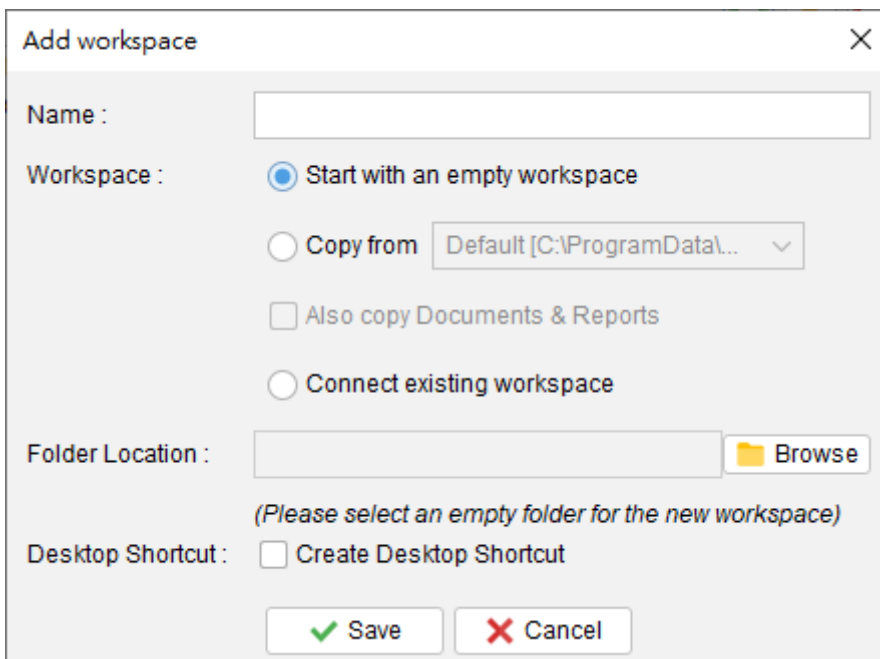
The main area on the right will lists in tabular format. You can highlight the components and right-click on it to show the popup menu. The popup menu provides further functions.

3.1. Workspace

EasyBilling stores documents, reports and settings of your company in a single folder, called workspace. You may create different workspaces for different companies. To manage your workspace, simply click menu “File > Switch Workspace”.

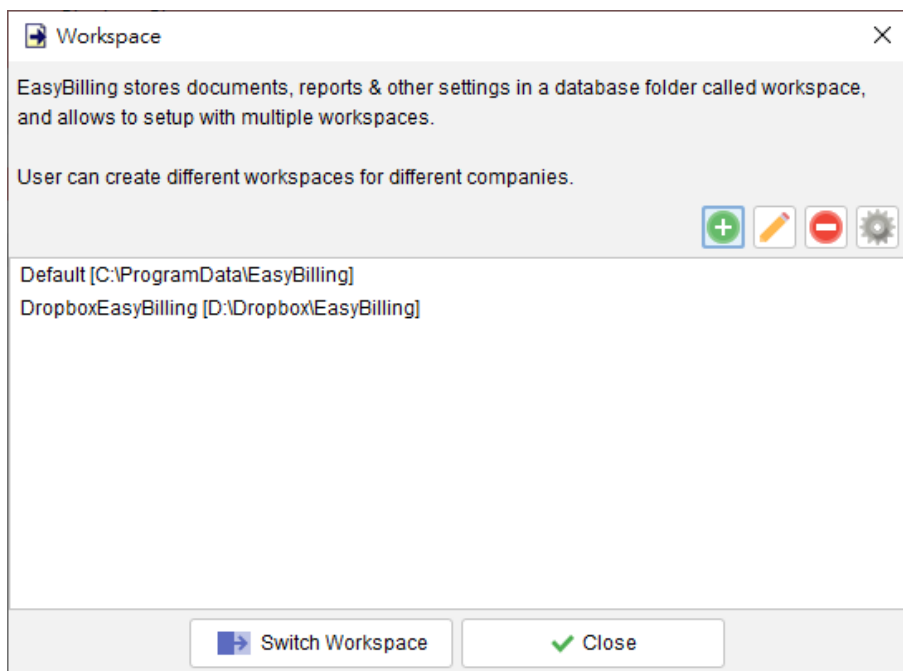


The first workspace in EasyBilling is named as Default. You can click [+] button to add workspace.



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To switch to another workspace, simply highlight the workspace and click [Switch Workspace] button at the bottom.

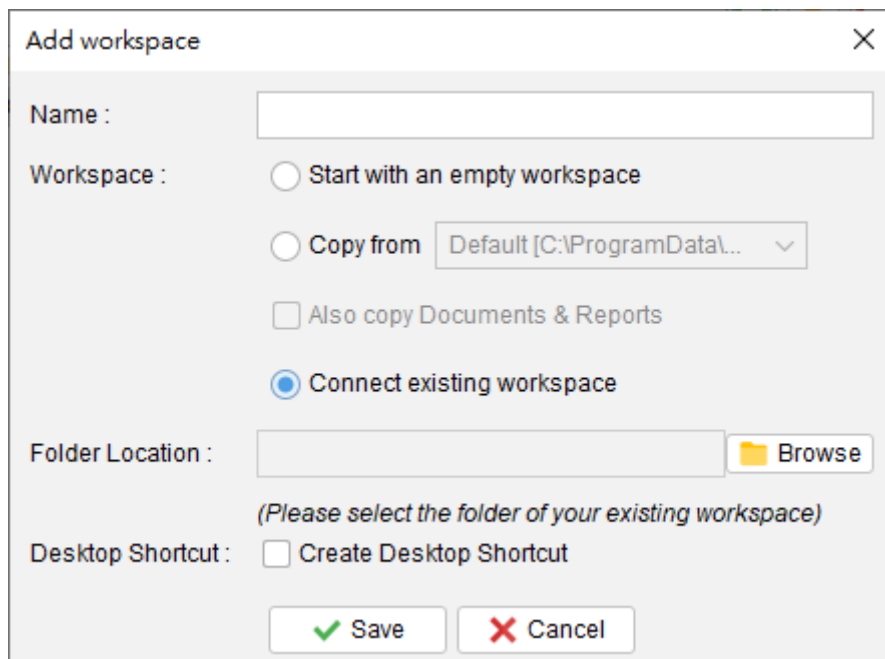


3.2. Connect and Share Database between two computers

EasyBilling is a standalone application, and does not have network/multi-user access features.

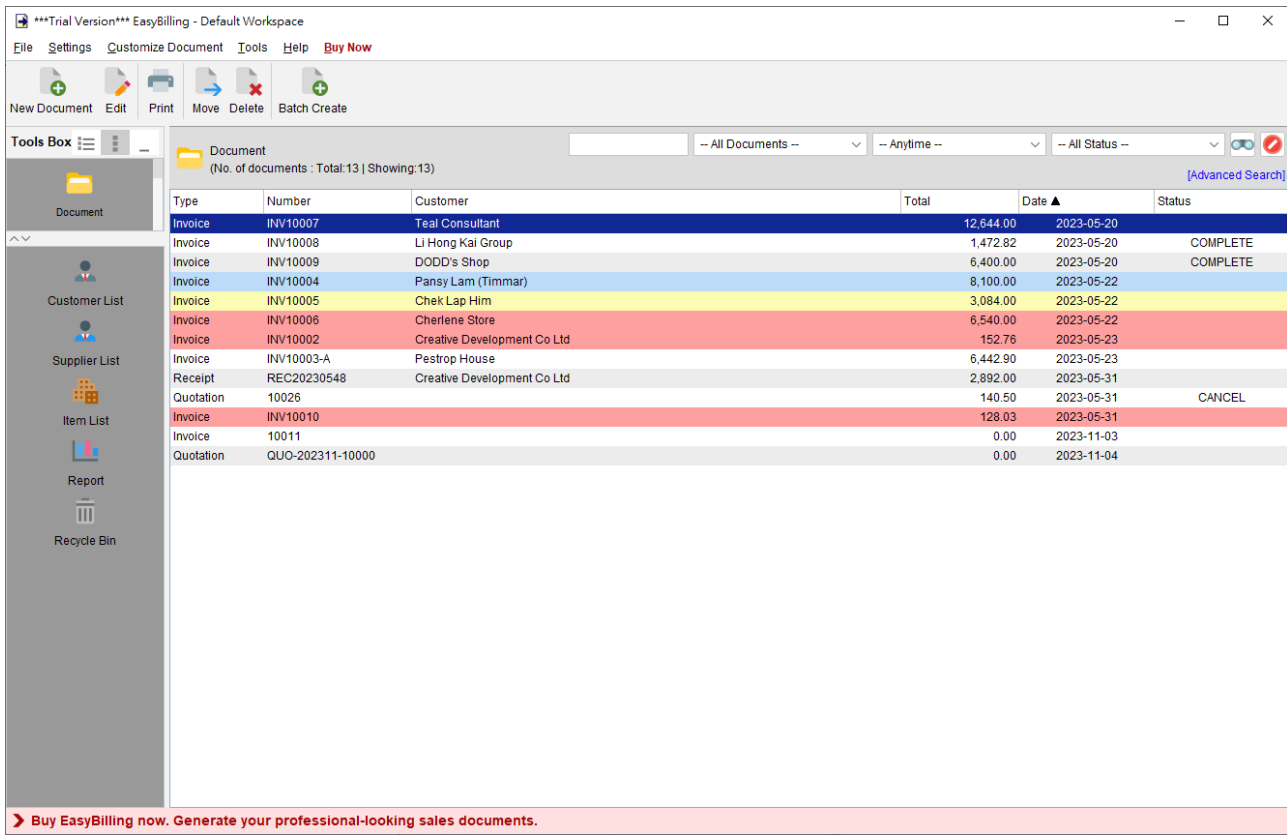
However, you can set the Data Folder (workspace) to a network drive/shared folder, so that EasyBilling from different computers can access the same database.

In EasyBilling, you can set your workspace in menu "File > Switch Workspace" and create a new workspace in a network drive or shared folder. In another computer, you can set the EasyBilling to use the same workspace folder but choose "Connect existing workspace". The two EasyBilling will connect and share the same database then.



Different EasyBilling cannot access the workspace at the same time. As the database is locked when EasyBilling is running, EasyBilling in other computers can only connect the same workspace in READ-ONLY mode.

4. DOCUMENT



Tool Bar at the top provides:

New Document– Create a new document: Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt, Purchase Order, Delivery Note, Packing Slip, Ordering, Packing List, Weight List, Credit Note and Debit Note.

Edit – Edit selected document.

Print – Print selected document.

Move – Move selected document into another folder.

Delete – Delete selected document to Recycle bin.

Batch Create – Create a batch of document with same content for multiple customers.

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Documents are listed in tabular format. Click on the table header to sort the documents accordingly. Search and filter options are provided at the top-right corner above the document list.

Right click on the document list will show a popup menu, which provide few other operations, including: Copy, Paste, Change Status, Color Highlight, Export Current List.

The screenshot displays the EasyBilling software interface. At the top, there is a menu bar with options: File, Settings, Customize Document, Tools, Help, and Buy Now. Below the menu bar is a toolbar with icons for New Document, Edit, Print, Move, Delete, and Batch Create. A Tools Box on the left side contains icons for Document, Customer List, Supplier List, Item List, Report, and Recycle Bin. The main area shows a document list table with columns: Type, Number, Customer, Total, Date, and Status. A context menu is open over the table, listing actions such as New Document, Edit, Copy, Paste, Change Status, Color Highlight, Preview, Print, Quick Export, Move, Delete, Save As File, Load From File, Export Current List, Refresh, and List Columns. A red banner at the bottom of the interface reads: Buy EasyBilling now. Generate your professional-looking sales documents.

Type	Number	Customer	Total	Date	Status
Invoice	INV10007	Teal Consultant	12,644.00	2023-05-20	
Invoice	INV10008	Li Hong Kai Group	1,472.82	2023-05-20	COMPLETE
Invoice	INV10009	DODD's Shop	6,400.00	2023-05-20	COMPLETE
Invoice	INV10004	Pansy Lam (Timmar)	8,100.00	2023-05-22	
Invoice	INV10005	Chek Lap Him	3,084.00	2023-05-22	
Invoice	INV10006	Cherlene Store	6,540.00	2023-05-22	
Invoice	INV10002	Creative Development Co Ltd	152.76	2023-05-23	
Invoice	INV10003-A	Pestrop House	6,442.90	2023-05-23	
Receipt	REC20230548	Creative Development Co Ltd	2,892.00	2023-05-31	
Quotation	10026		140.50	2023-05-31	CANCEL
Invoice	INV10010		128.03	2023-05-31	
Invoice	10011		0.00	2023-11-03	
Quotation	QUO-202311-10000		0.00	2023-11-04	
Quotation	QUO-202311-10001		0.00	2023-11-07	

4.1. Quotation

The screenshot shows the 'Quotation' window with a menu bar at the top containing 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu bar is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is divided into tabs: 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab is active, showing a 'Hide empty fields in output' checkbox. Below this are fields for 'Quote No.' (QUO-202311-10001), 'Stamp', 'Watermark', 'Currency' (Hong Kong Dollar, \$), 'Date' (2023-11-07), 'Sales Rep.', 'Customer Ref. No.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. A 'Customer Information' section contains 'Quote To' and 'Ship To' address fields, each with 'Tel' and 'VAT No' checkboxes. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Quote To” or “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

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There are five parts in Quotation:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Quotation, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

The screenshot displays the 'Quotation' application window with the 'Document Details' tab selected. The interface includes a menu bar (File, Export, Font, Font Size, Password, Buy Now) and a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main form area contains the following fields and options:

- Hide empty fields in output
- Quote No.: QUO-202311-10001 (with edit icon)
- Currency: Hong Kong Dollar, \$ (with add icon)
- Date: 2023 - 11 - 07 (YYYY-MM-DD) (with calendar icon)
- Sales Rep.: (with add icon)
- Customer Ref. No.: (empty field)
- Shipping Date: (with calendar icon)
- Shipping Term: (with add icon)
- Payment Term: (with add icon)
- Stamp: (dropdown menu with add icon)
- Watermark: (dropdown menu with add icon)

Customer Information

Quote To	Ship To
Address	Address

Tel Tel
 VAT No VAT No

Buttons: Load from Customer List, Save to Customer List, Clear

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

ID	Description	Unit	Unit Price	Qty	Total

The field provided with a checkbox is an optional field. Check the box will enable and show the field in the output document.

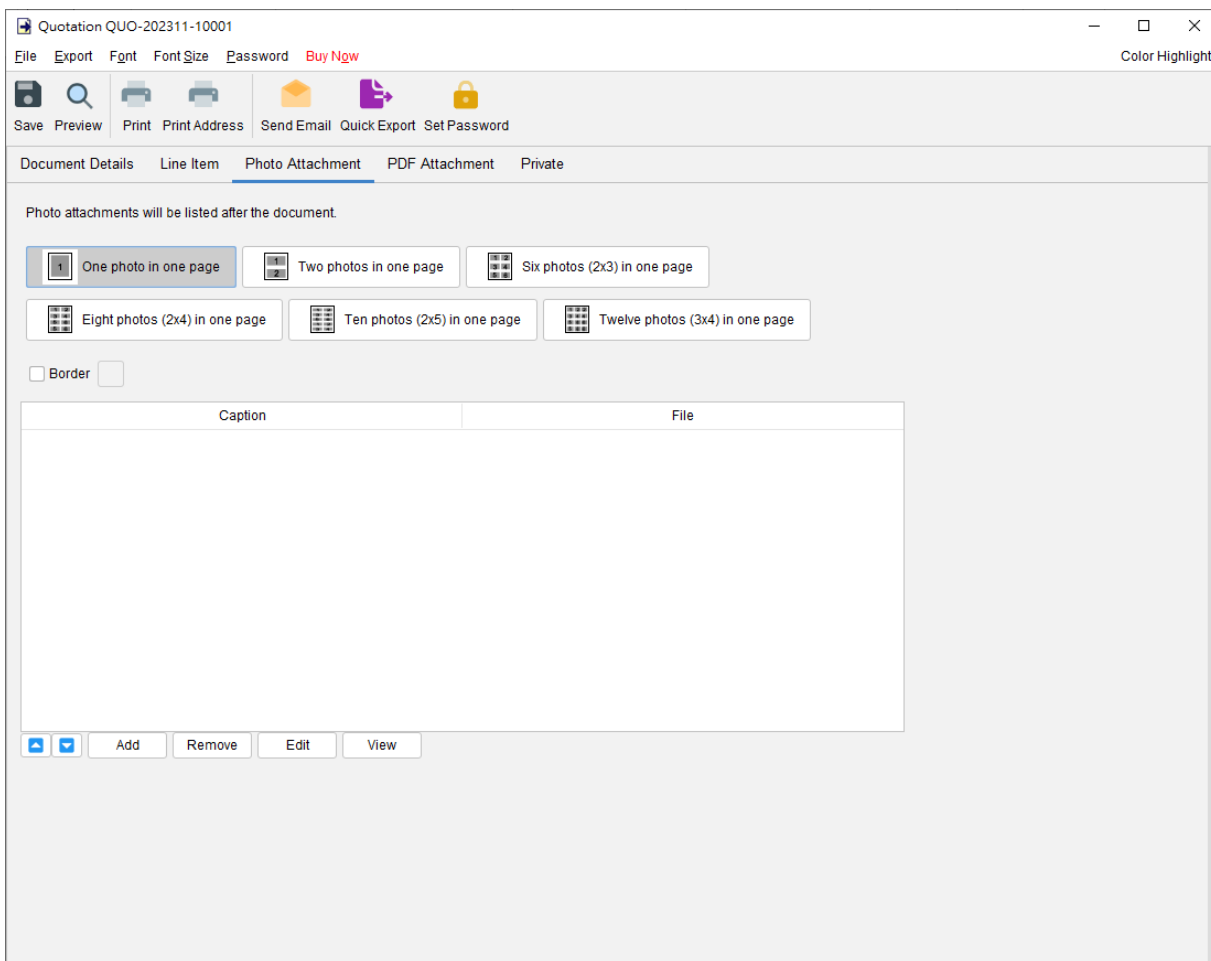
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

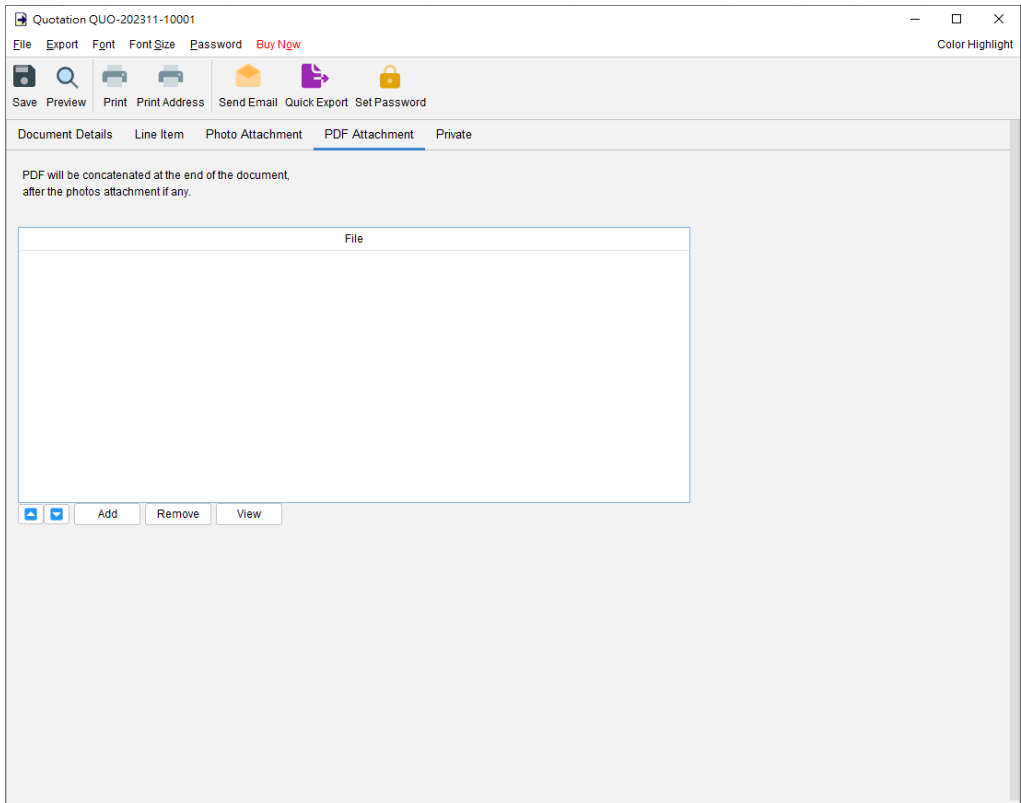
Photo Attachment – Photos can be attached to the end of document. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

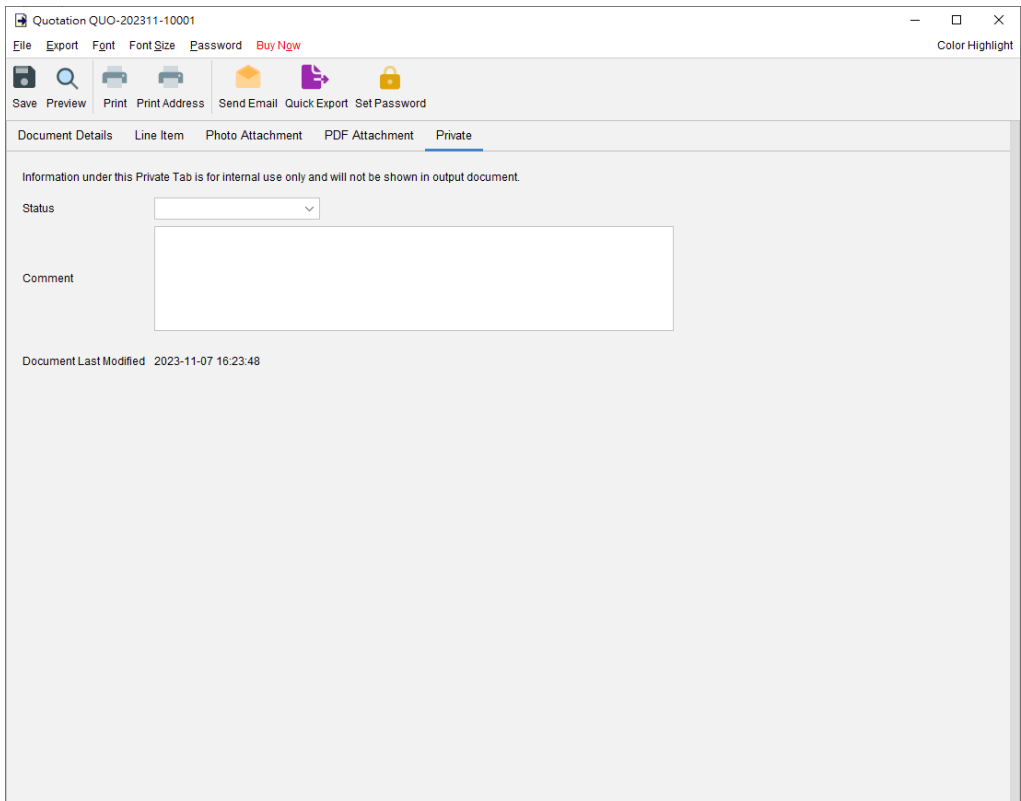
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.2. Proforma Invoice

The screenshot shows the 'Proforma Invoice' application window. The menu bar at the top includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu bar is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area is titled 'Document Details' and contains several sections: a 'Generate from Quotation' button, a 'Hide empty fields in output' checkbox, and a 'Proforma Invoice No.' field with the value '10000'. There are also fields for 'Stamp', 'Watermark', 'Currency' (set to 'Hong Kong Dollar, \$'), 'Date' (2023-11-07), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. Below these are 'Customer Information' sections for 'Bill To' and 'Ship To' addresses, each with a 'Tel' and 'VAT No' checkbox. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Bill To” or “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Proforma Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Proforma Invoice, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Proforma Invoice' application window. The 'Document Details' tab is active, showing various input fields for invoice information. At the top, there is a 'Generate from Quotation' button. Below it, fields include 'Proforma Invoice No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Currency' (Hong Kong Dollar, \$), 'Date' (2023-11-07), 'Order No.', 'Sales Rep.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. A 'Customer Information' section at the bottom is divided into 'Bill To' and 'Ship To' address fields, each with a 'Tel' and 'VAT No' checkbox. Navigation buttons 'Load from Customer List', 'Save to Customer List', and 'Clear' are located at the bottom right.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

The screenshot displays the 'Proforma Invoice' application window. At the top, there is a menu bar with options like 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is divided into tabs: 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active, showing a table with columns: ID, Description, Unit, Unit Price, Qty, and Total. The 'Total' column is highlighted in yellow. Below the table is a control panel with buttons for 'Add', 'Remove', 'Clear', 'Clear All', and 'Extra Blank Line'. To the right of this panel is a summary section with checkboxes for 'Sub-Total', 'Discount', 'Shipping', 'Total', 'Tax', 'Tax 2', 'Total', 'Deposit', and 'Balance', each with a corresponding value field. Below this is a 'Notes' section with a text area and a rich text editor toolbar. At the bottom, there are two signature boxes, each with 'Add "Company Chop"', 'Add "Signature" image', and 'Remove' buttons, and a date field.

The checkbox field is optional. Check the box will enable and show the field in the output document.

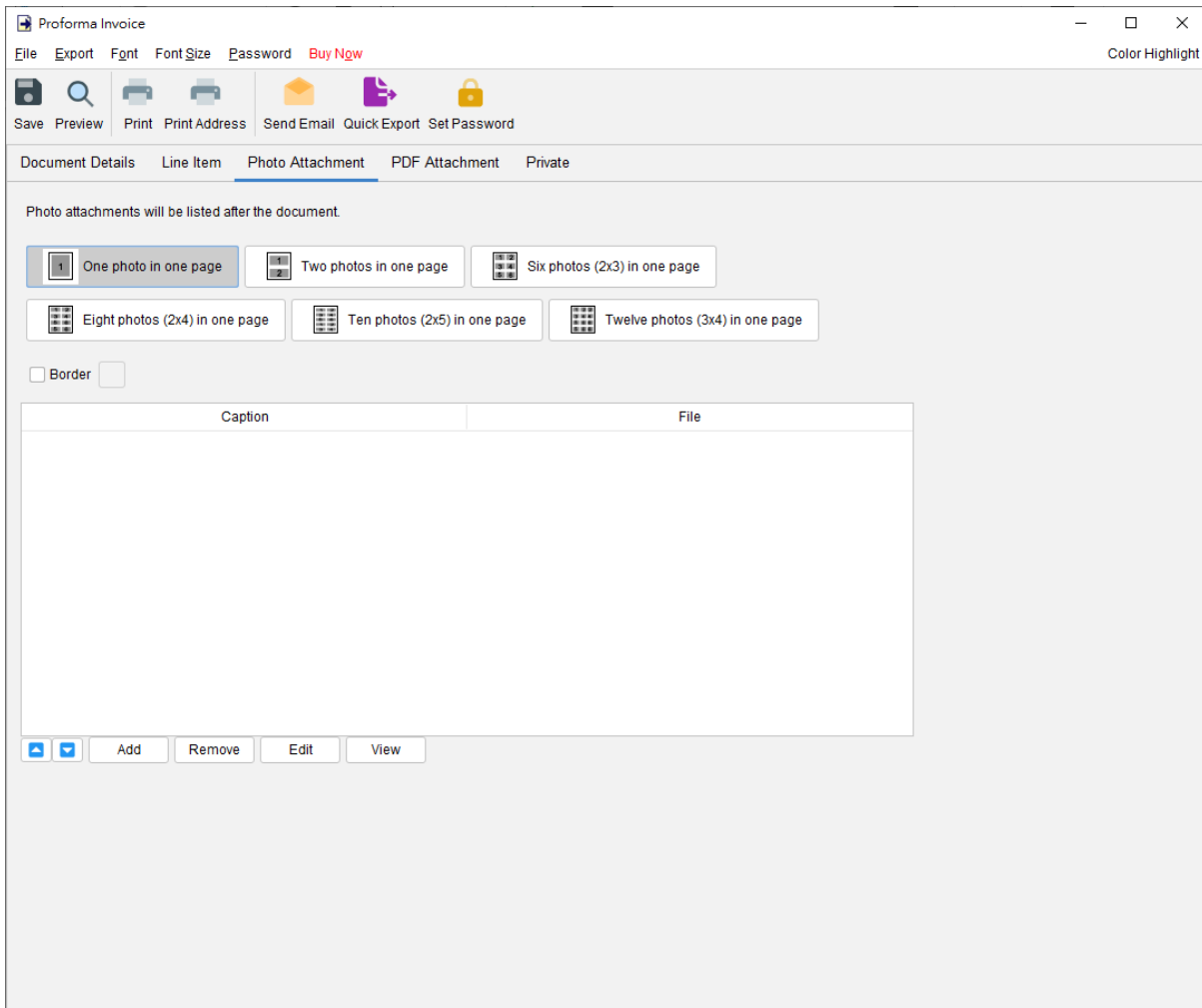
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

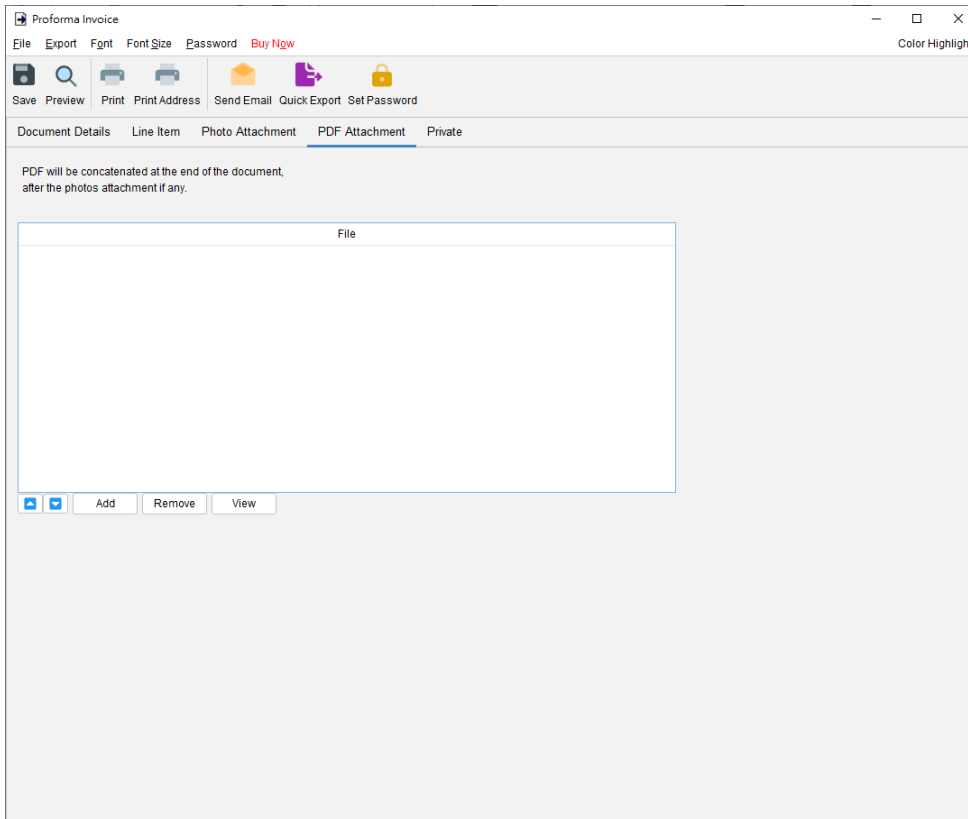
Photo Attachment – Photos can be attached to the end of document. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

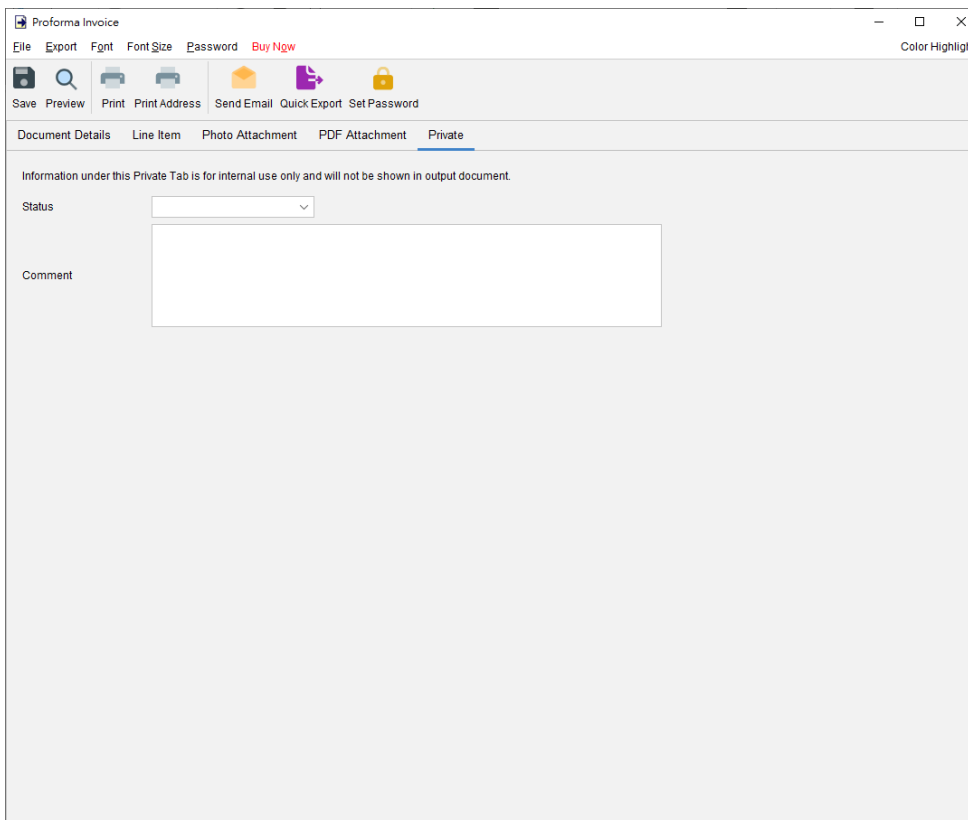
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.3. Invoice

The screenshot shows the 'Invoice' window with a menu bar (File, Export, Font, Font Size, Password, Buy Ngw) and a toolbar (Save, Preview, Print, Print Address, Send Email, Quick Export, Set Password). Below the toolbar is a tabbed interface with 'Document Details' selected. The form includes fields for Invoice No. (10012), Currency (Hong Kong Dollar, \$), Date (2023-11-07), Order No., Sales Rep., Shipping Date, Shipping Term, and Payment Term. There are also dropdown menus for Stamp and Watermark. A 'Customer Information' section contains 'Bill To' and 'Ship To' address fields, with checkboxes for 'Tel' and 'VAT No'. At the bottom right of the form are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Bill To” or “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

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There are six parts in Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private
- Payment Received

Document Details – Specify the header information of the Invoice, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Invoice' application window with the 'Document Details' tab selected. The interface includes a menu bar with options like 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main form area contains several input fields and dropdown menus for invoice details:

- Hide empty fields in output
- Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note
- Invoice No.: 10012
- Currency: Hong Kong Dollar, \$
- Date: 2023 - 11 - 07 (YYYY-MM-DD)
- Order No.:
- Sales Rep.:
- Shipping Date:
- Shipping Term:
- Payment Term:

The 'Customer Information' section is divided into two columns:

- Bill To:** Address, Tel, VAT No.
- Ship To:** Address, Tel, VAT No.

Navigation arrows (left and right) are positioned between the two columns. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

ID	Description	Unit Price	Qty	Total

Summary Section:

- Sub-Total: 0.00
- Discount: 0.00
- Shipping: 0.00
- Total: 0.00
- Tax: 0.00
- Tax 2: 0.00
- Total: 0.00
- Deposit: 0.00
- Balance: 0.00

Notes: [Text area with formatting icons]

Signature Boxes:

- Left Signature Box: Add "Company Chop"..., Add "Signature" image, Remove
- Right Signature Box: Add "Company Chop"..., Add "Signature" image, Remove

Date: [Date picker]

The checkbox field is optional. Check the box will enable and show the field in the output document.

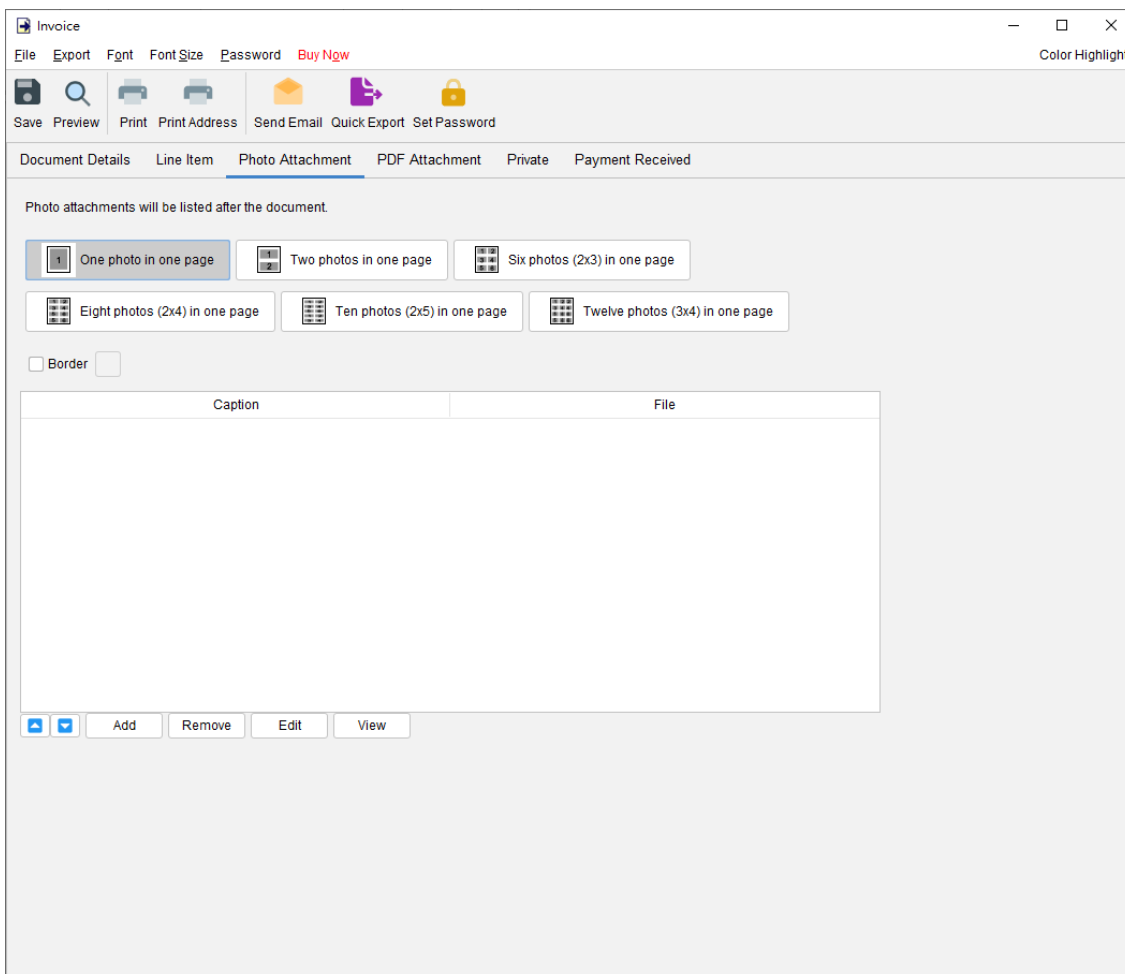
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

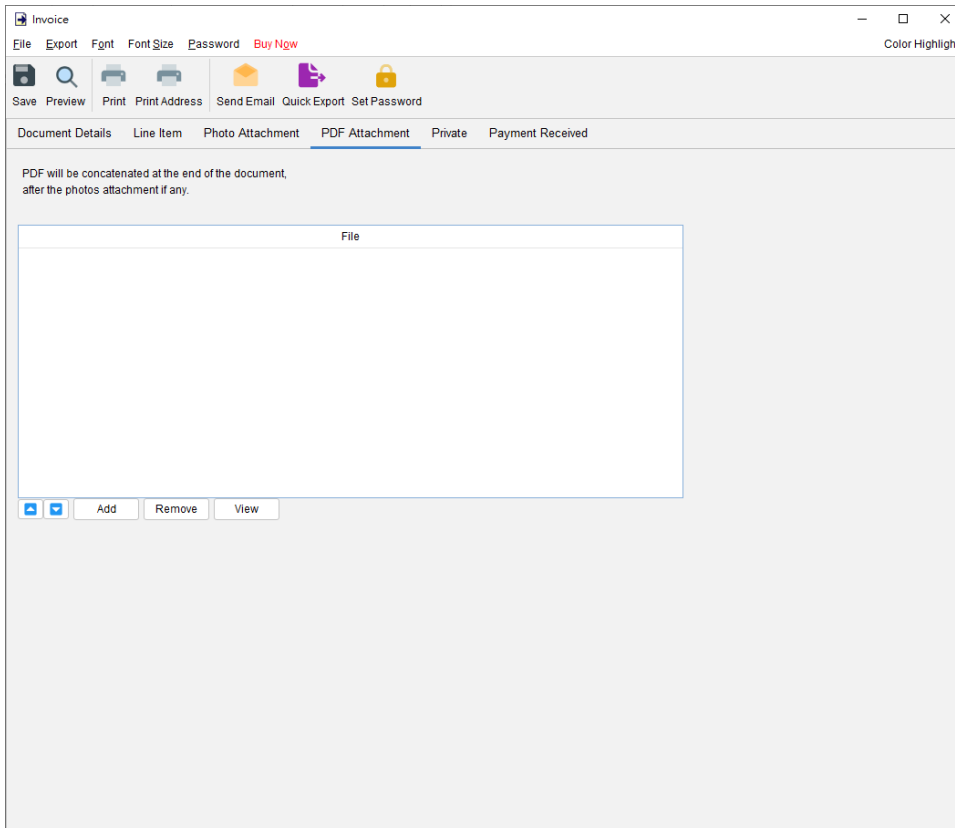
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

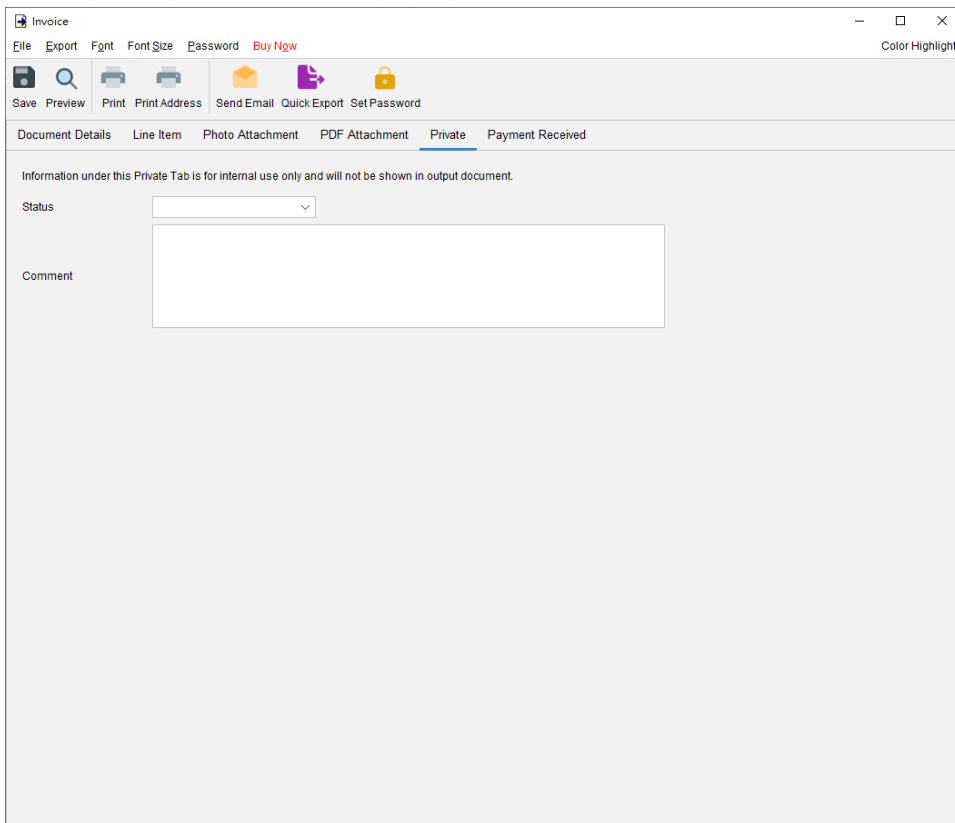
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



Payment Received – This tab is to record the payment received for the Invoice.

The screenshot shows the 'Payment Received' tab in the EasyBilling software. At the top, there is a menu bar with options like 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is titled 'Record payment for Invoice' and contains a table with columns: 'Date', 'Payment Method', 'Reference Number', 'Description', and 'Amount Received'. Below the table are 'Add', 'Remove', and 'Edit' buttons. To the left of the table is a summary section with fields for 'Invoice Total', 'Deposit', 'Balance', 'Total Payment Received', and 'Outstanding Balance', each with a value of 0.00. Below this is a rich text editor with a 'Notes' checkbox and various text formatting options. At the bottom, there are sections for 'Left Signature Box' and 'Right Signature Box', each with 'Add' and 'Remove' buttons for 'Company Chop' and 'Signature' images, and a 'Date' field with a calendar icon.

Click [Add] button add a record for the payment, includes: Date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The screenshot shows a dialog box titled 'Payment Received' with a close button (X) in the top right corner. The dialog is titled 'Input details of payment received' and contains the following fields: 'Date' (with a calendar icon and '(YYYY-MM-DD)' format), 'Payment Method', 'Reference Number', 'Description' (a large text area), and 'Amount Received'. At the bottom of the dialog are two buttons: a green 'Add' button and a red 'Cancel' button.

The payment received record can be previewed or printed out by clicking [Preview] or [Print] button at the top right corner.

4.4. Tax Invoice

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Bill To” or “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are six parts in Tax Invoice:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private
- Payment Received

Document Details – Specify the header information of the Tax Invoice, includes Number, Currency, Date, Payment/Shipping Term, Shipping Date, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Tax Invoice' application window. The 'Document Details' tab is active, displaying various input fields for invoice information. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main form area includes a 'Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note' button. Fields include Invoice No. (10002), Currency (Hong Kong Dollar, \$), Date (2023-11-07), Order No., Sales Rep., Shipping Date, Shipping Term, and Payment Term. A 'Customer Information' section has 'Bill To' and 'Ship To' address fields, with 'Tel' and 'VAT No' checkboxes. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

ID	Description	Unit	Unit Price	Qty	Taxable	Total
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

The checkbox field is optional. Check the box will enable and show the field in the output document.

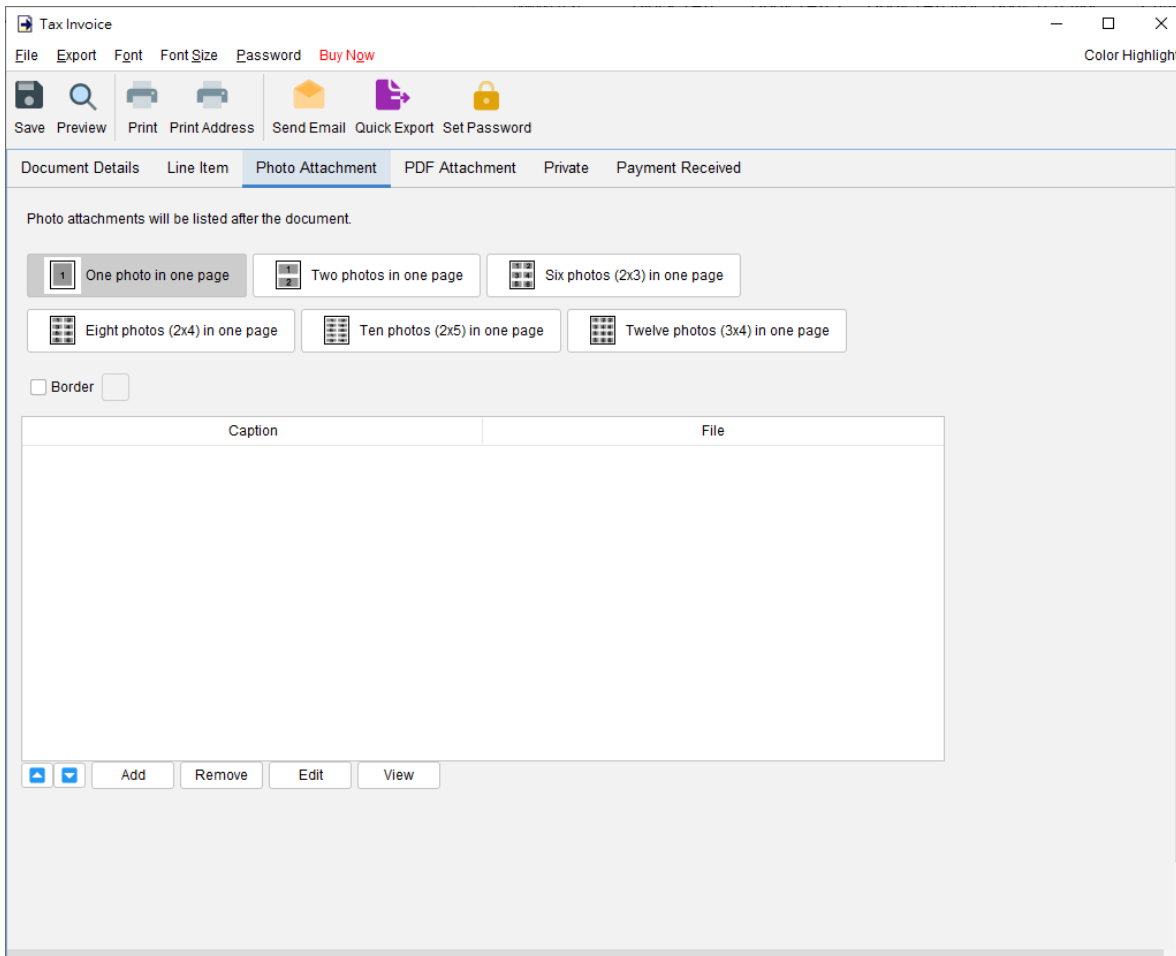
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

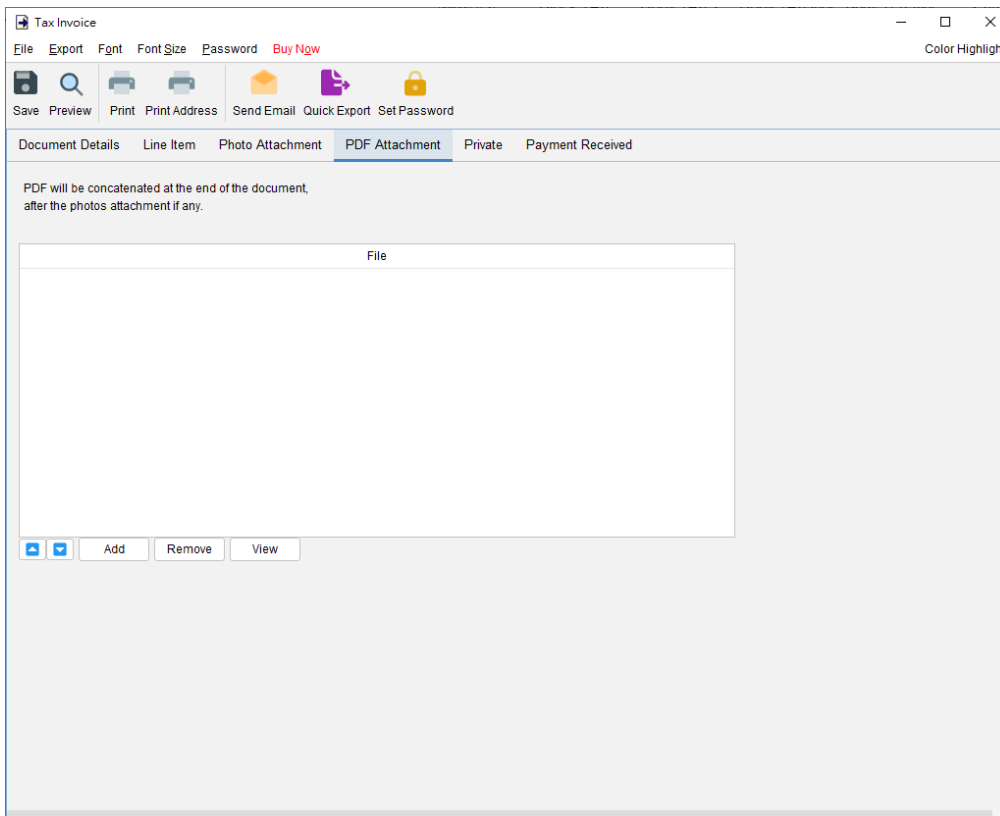
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

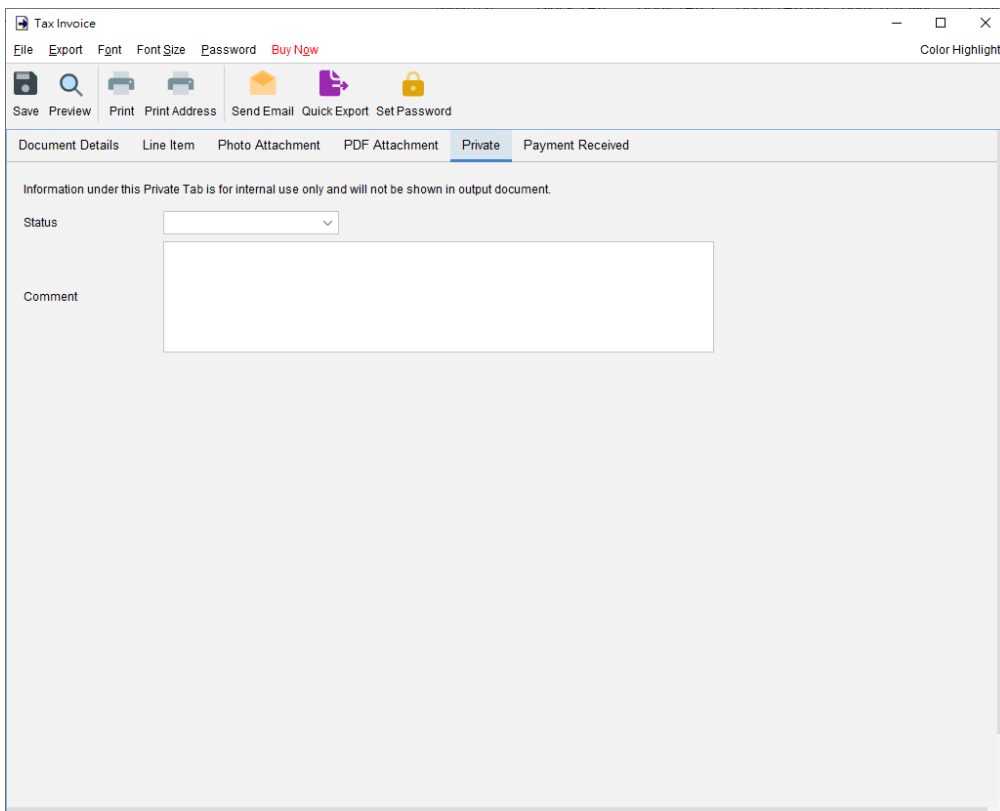
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



Payment Received – This tab is to record the payment received for the Invoice.

The screenshot shows the 'Payment Received' tab in the EasyBilling software. The window title is 'Tax Invoice'. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is titled 'Record payment for Invoice' and features a table with columns: 'Date', 'Payment Method', 'Reference Number', 'Description', and 'Amount Received'. Below the table are 'Add', 'Remove', and 'Edit' buttons. To the left of the table, there are summary fields: 'Tax Invoice Total' (0.00), 'Deposit', 'Balance', 'Total Payment Received' (0.00), and 'Outstanding Balance' (0.00). Below these are 'Notes' with a rich text editor toolbar. At the bottom, there are sections for 'Left Signature Box' and 'Right Signature Box', each with 'Add' and 'Remove' buttons for company chop and signature images, and a date picker.

Click [Add] button add a record for the payment, includes: Date, payment method, reference number, description and amount for the payment received. The outstanding balance under the table will be calculated automatically.

The screenshot shows the 'Payment Received' input dialog box. It has a title bar with a close button (X). The main area is titled 'Input details of payment received'. It contains the following fields: 'Date' (with a date picker showing YYYY-MM-DD and a calendar icon), 'Payment Method' (text input), 'Reference Number' (text input), 'Description' (text area), and 'Amount Received' (text input). At the bottom, there are two buttons: a green 'Add' button and a red 'Cancel' button.

The payment received record can be previewed or printed out by clicking [Preview] or [Print] button at the top right corner.

4.5. Receipt

The screenshot shows the 'Receipt' form in the EasyBilling application. The window title is 'Receipt' and it has standard window controls (minimize, maximize, close) in the top right corner. Below the title bar is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now' (in red). To the right of the menu bar is a 'Color Highlight' button. Below the menu bar is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. Below the toolbar is a tabbed interface with 'Document Details' selected, and other tabs for 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The main form area contains a checkbox for 'Hide empty fields in output' and a dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Debit Note'. Below this are fields for 'Receipt No.' (10001), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Currency' (Hong Kong Dollar, \$), and 'Date' (2023-11-07). There is a 'Payer Information' section with fields for 'Payer' and 'Address'. At the bottom left of the form are checkboxes for 'Tel' and 'VAT No'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Payer” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

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There are five parts in Receipt:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Receipt, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows a web application window titled "Receipt". The interface includes a menu bar with "File", "Export", "Font", "Font Size", "Password", and "Buy Ngw". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Print Address", "Send Email", "Quick Export", and "Set Password". The main content area has five tabs: "Document Details" (selected), "Line Item", "Photo Attachment", "PDF Attachment", and "Private".

Under the "Document Details" tab, there is a checkbox for "Hide empty fields in output". Below it is a text input field with the placeholder "Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Debit Note".

The form contains several input fields:

- Receipt No.:** A text input field containing "10001" and an edit icon.
- Stamp:** A dropdown menu and a green "+" button.
- Watermark:** A dropdown menu and a green "+" button.
- Currency:** A dropdown menu containing "Hong Kong Dollar, \$" and a green "+" button.
- Date:** A date picker showing "2023 - 11 - 07" in YYYY-MM-DD format, with a calendar icon.

The "Payer Information" section includes:

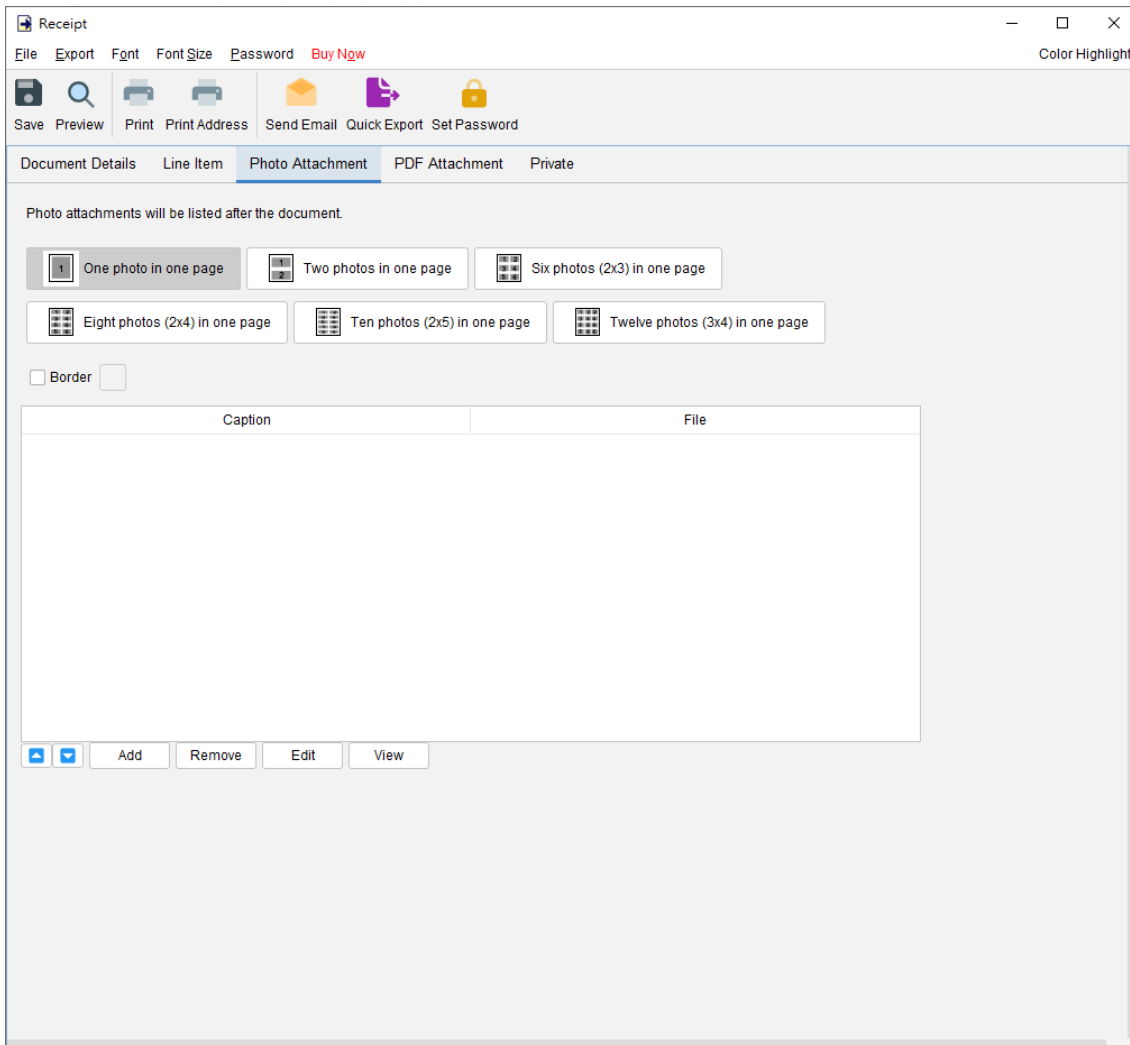
- Payer:** A text input field.
- Address:** A multi-line text input field.
- Tel:** A checkbox.
- VAT No:** A checkbox.

At the bottom right, there are three buttons: "Load from Customer List", "Save to Customer List", and "Clear".

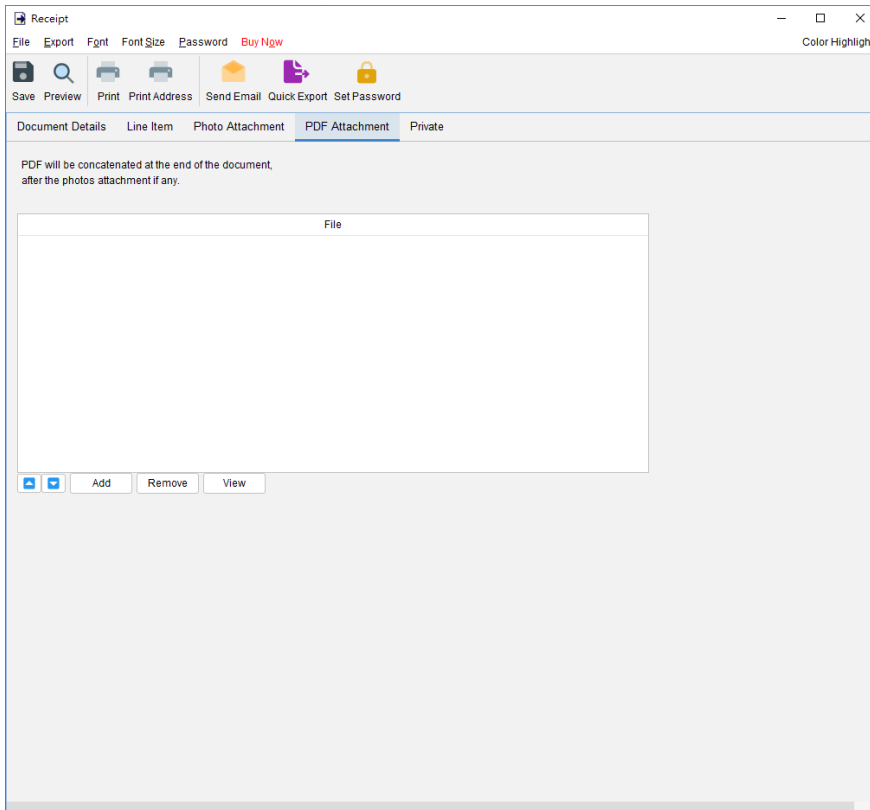
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

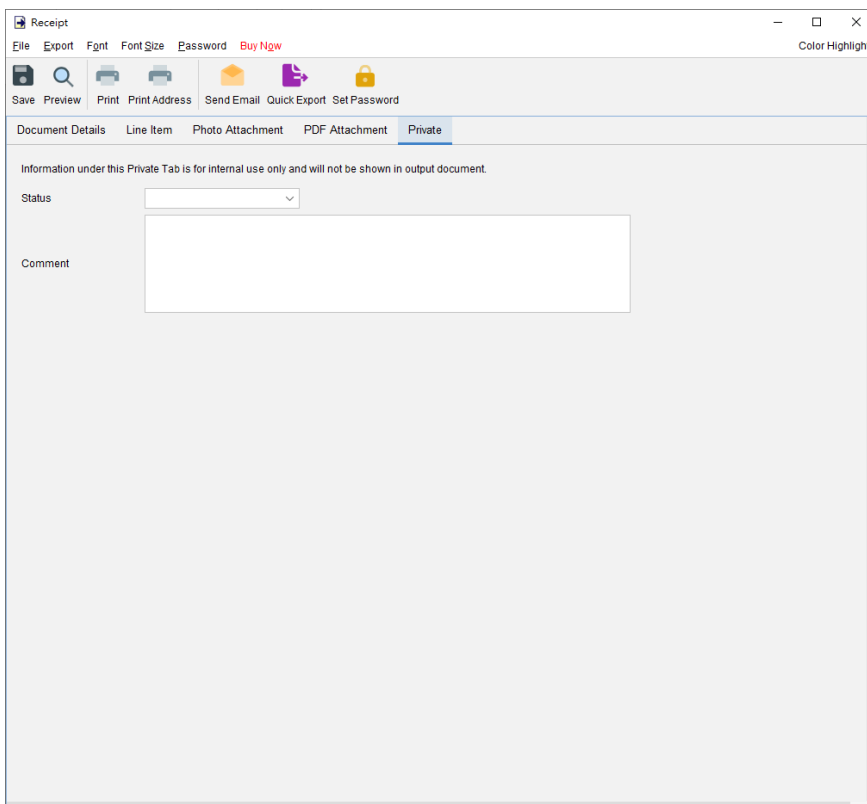
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.6. Purchase Order

The screenshot shows a web application window titled "Purchase Order". At the top, there is a menu bar with options: File, Export, Font, Font Size, Password, and Buy Ngw. Below the menu bar is a tools bar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main content area is divided into tabs: Document Details (selected), Line Item, Photo Attachment, PDF Attachment, and Private. Under the "Document Details" tab, there is a checkbox for "Hide empty fields in output" and a dropdown menu for "Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice". The form contains several input fields: Purchase Order No. (10000), Stamp (dropdown), Watermark (dropdown), Currency (Hong Kong Dollar, \$), Purchase Order Date (2023-11-08), Suppliers Reference, Delivery Req'd By, Shipping Term, and Payment Term. There are also sections for "Supplier Info" and "Ship To" with multiple address lines and checkboxes for "Tel" and "VAT No". At the bottom, there are buttons for "Load from Supplier List", "Save to Supplier List", "Clear", "Load My Company Address", "Load from Customer List", and "Clear".

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Supplier” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Purchase Order:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Purchase Order, includes Number, Currency, Date, Payment/Shipping Term, and Customer Information. Supplier Information can be typed in directly or load from the Supplier List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Purchase Order' application window. The title bar includes 'Purchase Order' and window control buttons. The menu bar contains 'File', 'Export', 'Fgnt', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar features icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main interface has a tabbed menu with 'Document Details' selected. Below the tabs, there is a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice' button. The form fields include: 'Purchase Order No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Currency' (Hong Kong Dollar, \$), 'Purchase Order Date' (2023-11-08), 'Suppliers Reference', 'Delivery Req'd By', 'Shipping Term', and 'Payment Term'. There are two columns for 'Supplier Info' and 'Ship To' addresses, each with checkboxes for 'Tel' and 'VAT No'. At the bottom, there are buttons for 'Load from Supplier List', 'Save to Supplier List', 'Clear', 'Load My Company Address', 'Load from Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

ID	Description	Unit	Unit Price	Qty	Total

<input checked="" type="checkbox"/> Sub-Total	0.00
<input checked="" type="checkbox"/> Discount	0.00
<input type="checkbox"/> Shipping	
<input type="checkbox"/> Total	
<input checked="" type="checkbox"/> Tax	0.00
<input type="checkbox"/> Tax 2	0.00
Total	0.00

The checkbox field is optional. Check the box will enable and show the field in the output document.

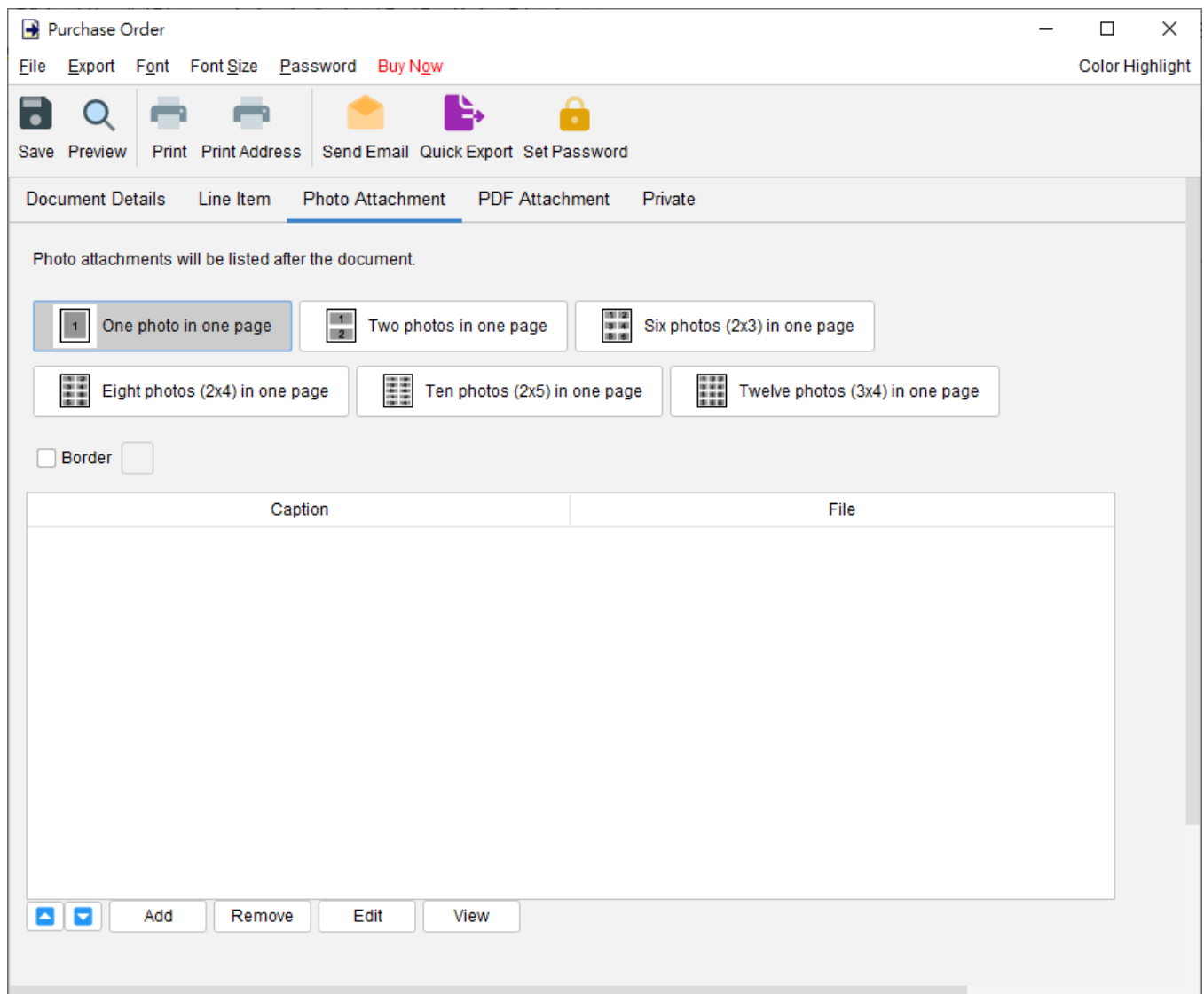
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

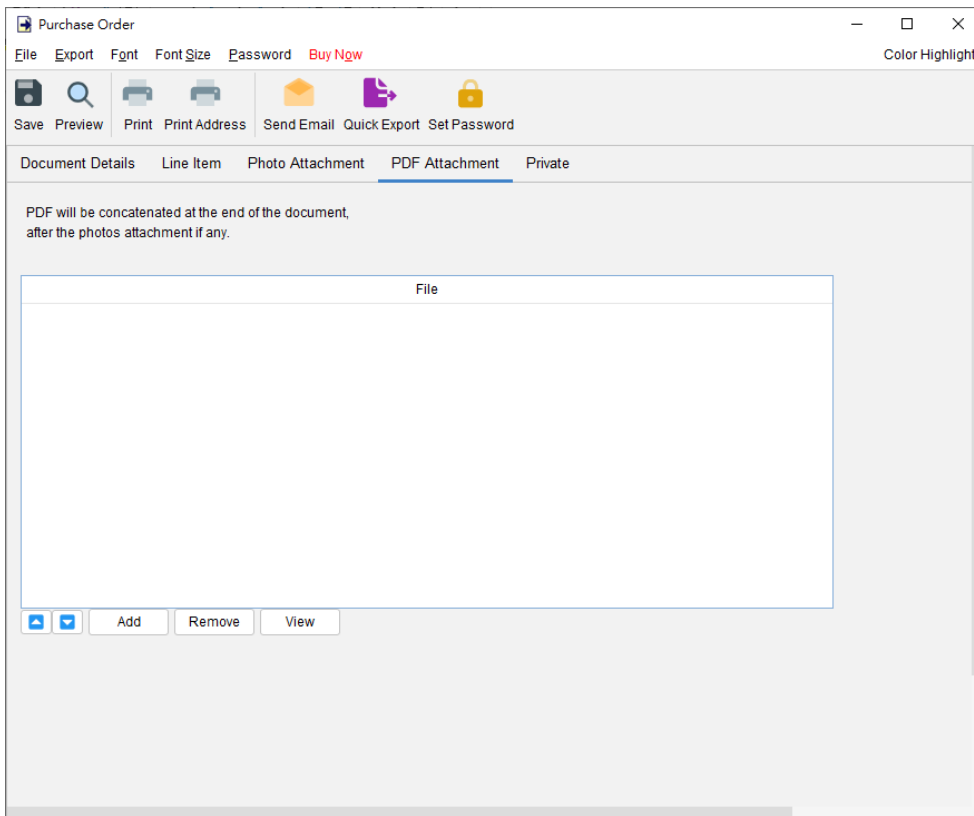
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

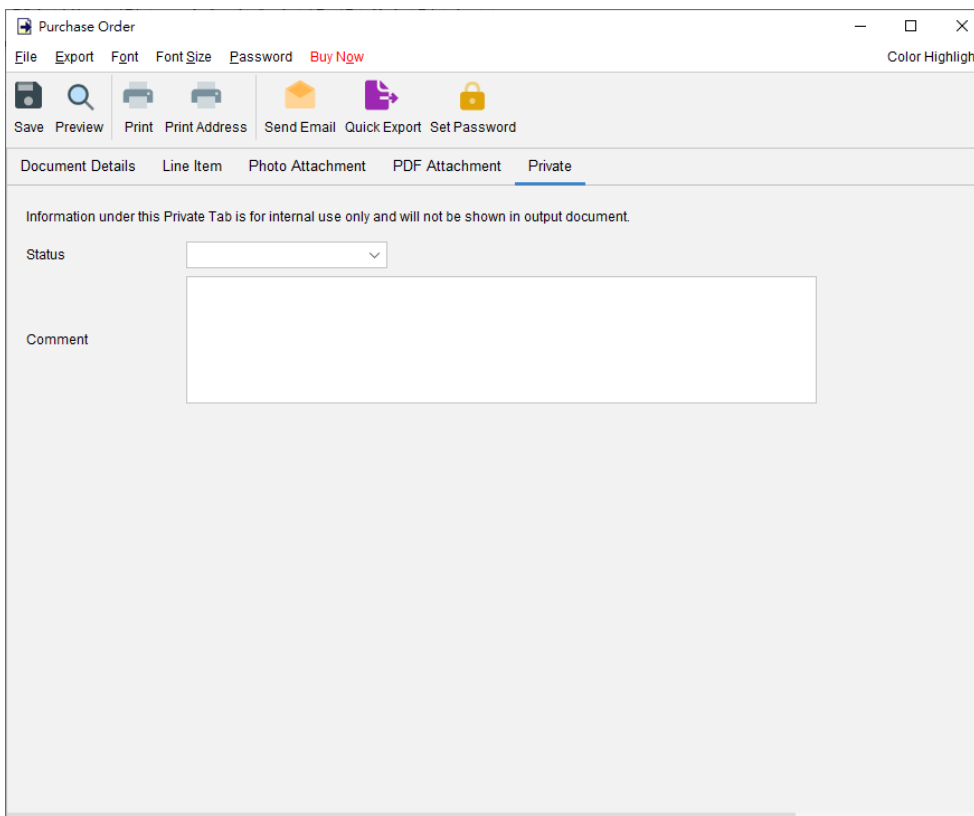
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.7. Delivery Note

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Delivery To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Delivery Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Delivery Note, includes Number, Date, Delivery Date/Time, Delivery Term and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Delivery Note' application window. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main interface has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'. The 'Delivery Note No.' field contains '10002'. There are fields for 'Stamp' and 'Watermark', each with a dropdown and a '+' button. The 'Date' field is set to '2023 - 11 - 08' with a calendar icon. There are fields for 'Invoice No.', 'Delivery Date/Time', and 'Delivery Term'. A large text area is labeled 'Notes'. The 'Customer Information' section includes fields for 'Delivery To' and 'Address', and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

The screenshot shows the 'Delivery Note' application window. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', and 'Password'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area is divided into tabs: 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active, displaying a table with columns for ID, Description, Unit, and Qty. Below the table is a control panel with buttons for 'Add', 'Remove', 'Clear', 'Clear All', and 'Extra Blank Line' (set to 0). There are also checkboxes for 'Total Quantity' (set to 0) and 'Notes'. The 'Notes' field is a large text area with a rich text editor toolbar including Bold, Italic, Underline, Increase Font Size, Decrease Font Size, Text Color, and Background Color. At the bottom, there are two signature boxes, each with a 'Left Signature Box' and 'Right Signature Box' checkbox, and a 'Date' field with a calendar icon.

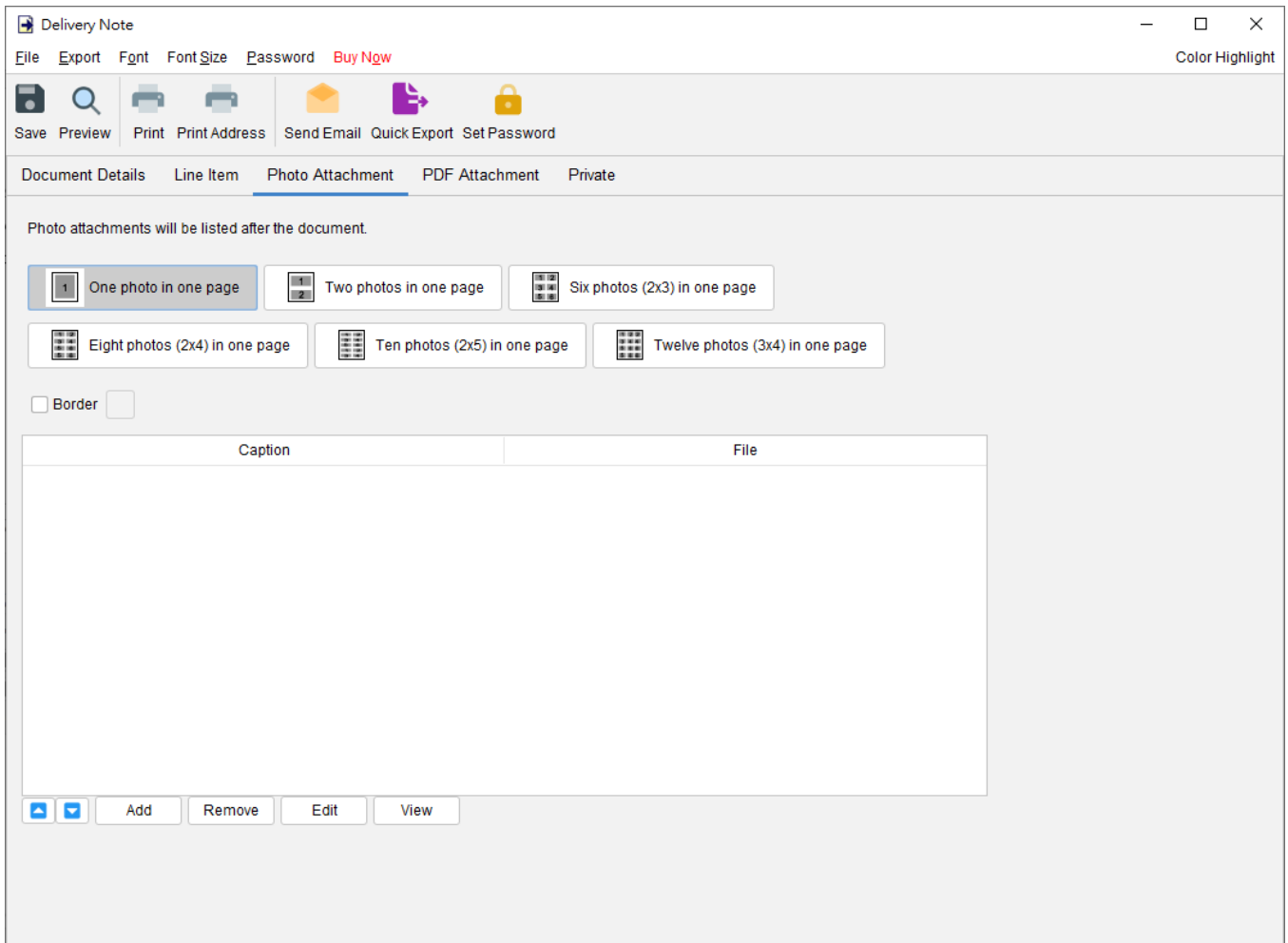
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

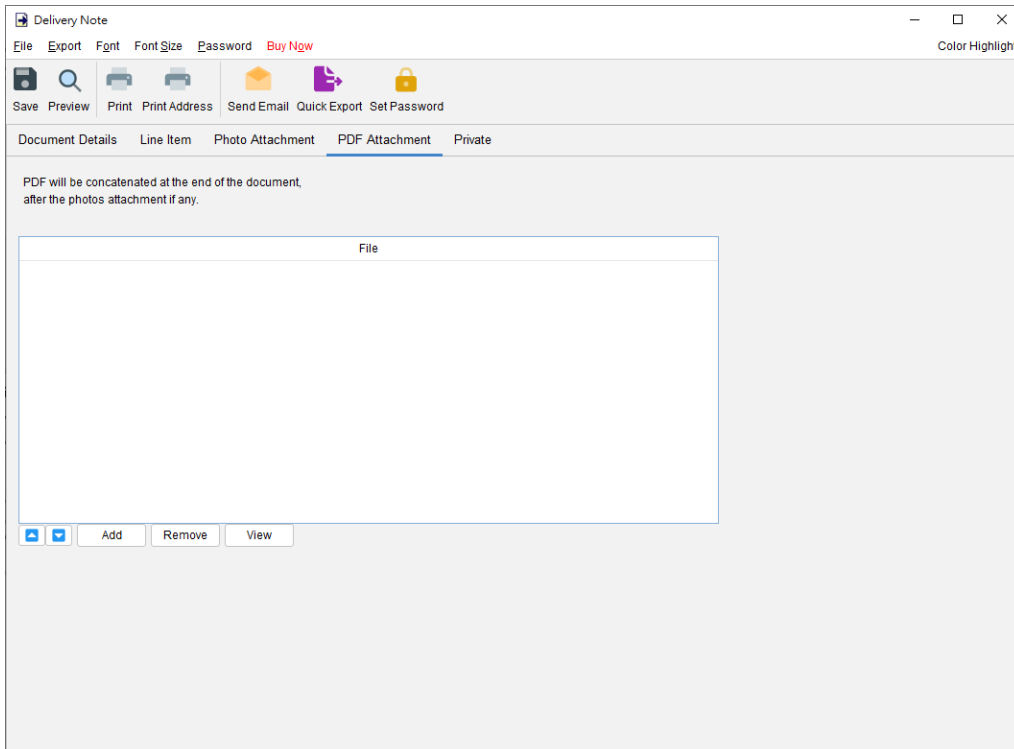
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

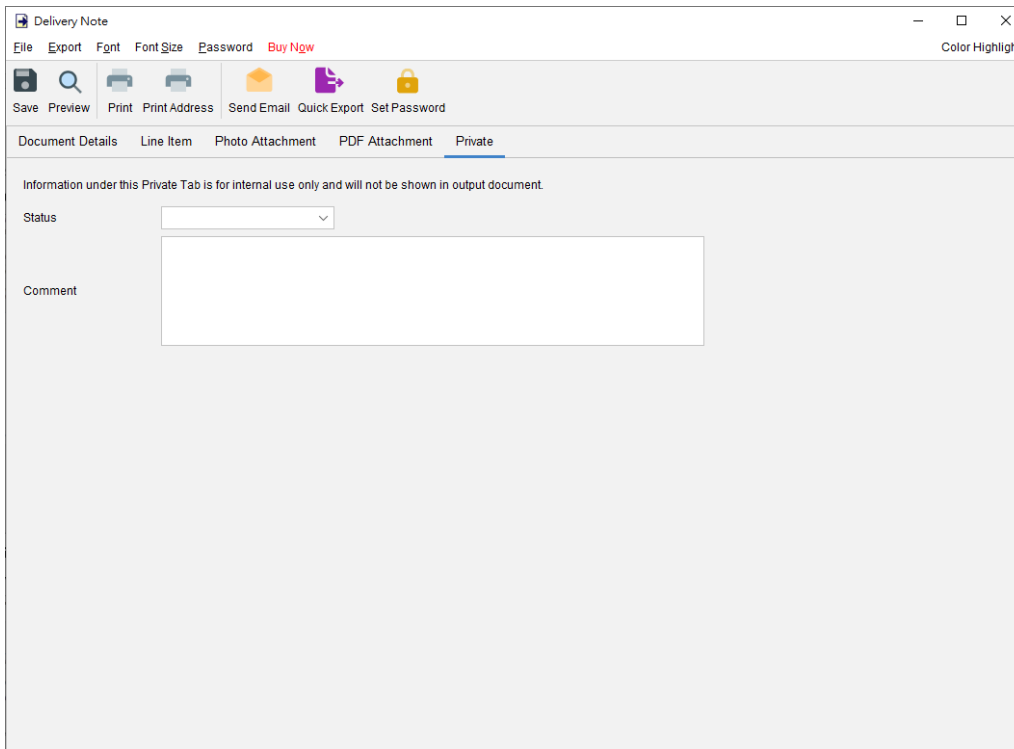
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.8. Packing Slip

The screenshot shows the 'Packing Slip' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below it is a tools bar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main interface has a tabbed view with 'Document Details' selected. This tab contains a checkbox 'Hide empty fields in output', a dropdown menu 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt', and several input fields: 'Packing Slip No.' (10000), 'Stamp', 'Watermark', 'Date' (2023-11-08), 'Invoice No.', 'Order Number', and 'Shipping Term'. A 'Customer Information' section follows with 'Ship To' and 'Address' fields, checkboxes for 'Tel' and 'VAT No', and buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Packing Slip:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Packing Slip, includes Number, Currency, Date, Shipping Term, Order Number and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Packing Slip' application window. The title bar includes 'Packing Slip' and window control buttons. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar includes icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. Below the toolbar are five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab contains the following fields and controls:

- Hide empty fields in output
- Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt
- Packing Slip No. 10000 (with edit icon)
- Stamp (dropdown menu)
- Watermark (dropdown menu)
- Date: 2023 - 11 - 08 (YYYY-MM-DD) (with calendar icon)
- Invoice No. (text input)
- Order Number (text input)
- Shipping Term (dropdown menu)
- Customer Information section:
 - Ship To (text input)
 - Address (multiple text input lines)
 - Tel
 - VAT No
- Buttons: Load from Customer List, Save to Customer List, Clear

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

The screenshot shows the 'Ordering' application window. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', and 'Password'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active, displaying a table with columns: ID, Description, Qty, Date Ordered, and Date Received. Below the table is a control panel with buttons for 'Add', 'Remove', 'Clear', 'Clear All', and 'Extra Blank Line' (set to 0). There is a 'Total Quantity' field with a yellow highlight and a value of 0. A 'Notes' section includes a text area and a toolbar with formatting options: Bold (B), Italic (I), Underline (U), Increase Font Size (A+), Decrease Font Size (A-), Text Color (A), and Background Color (A). Below the notes are buttons for 'Load from Note L...' and 'Save to Note List'. At the bottom, there are two signature boxes: 'Left Signature Box' and 'Right Signature Box'. Each box contains an 'Add "Company Chop"...' button, an 'Add "Signature" image' button, and a 'Remove' button. There are also date input fields for both signature boxes.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.

Packing Slip

File Export Font Font Size Password Buy Ngw Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item **Photo Attachment** PDF Attachment Private

Photo attachments will be listed after the document.

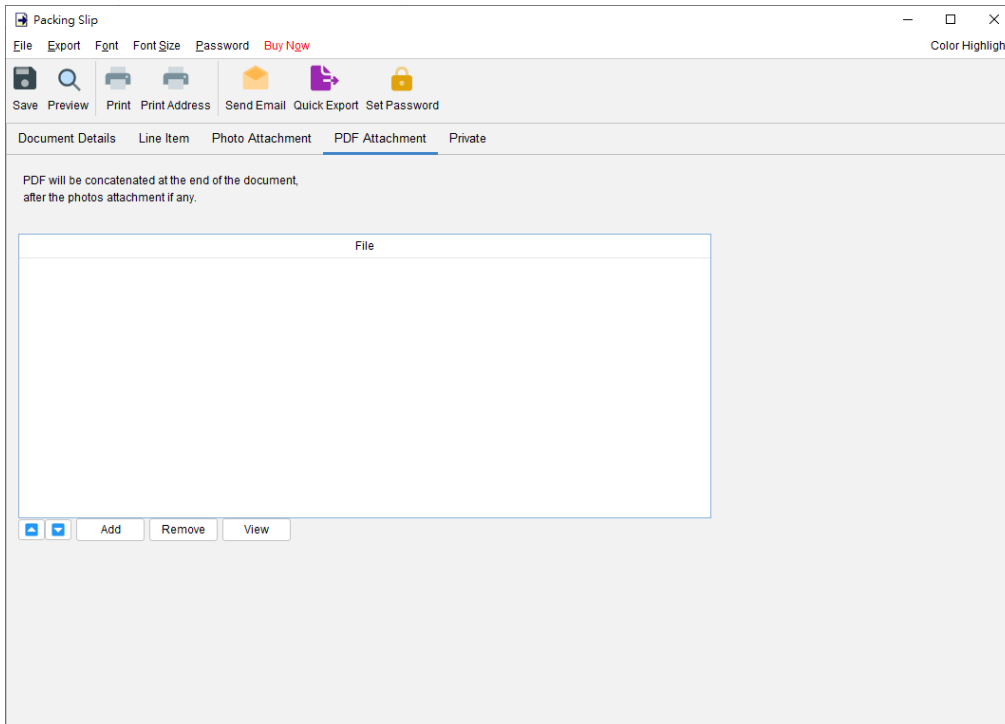
One photo in one page Two photos in one page Six photos (2x3) in one page

Eight photos (2x4) in one page Ten photos (2x5) in one page Twelve photos (3x4) in one page

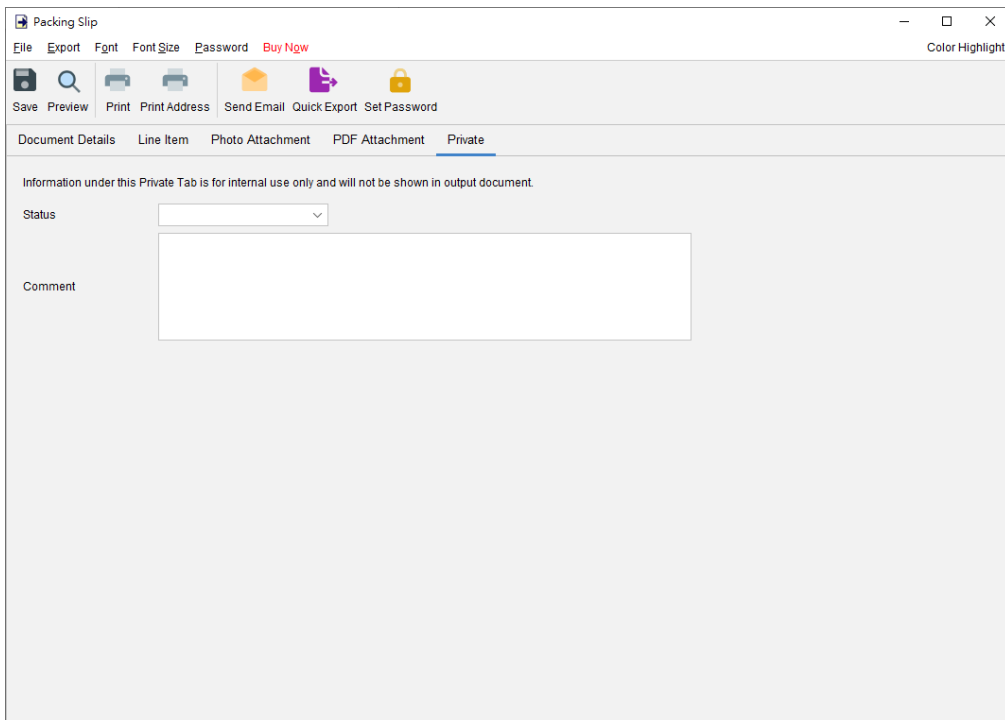
Border

Caption	File
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PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.9. Ordering

The screenshot shows the 'Ordering' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below the menu bar is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main area is titled 'Document Details' and contains several sections: a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt' dropdown; 'Ordering No.' (10000) with an edit icon; 'Stamp' and 'Watermark' dropdowns with add icons; 'Date' (2023-11-08) with a calendar icon; 'Invoice No.' and 'Delivery Date/Time' fields with a calendar icon; 'Delivery Term' dropdown with an add icon; a 'Notes' text area; and a 'Customer Information' section with 'Delivery To' and 'Address' fields, and checkboxes for 'Tel' and 'VAT No'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Delivery To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

EasyBilling User Guide

There are five parts in Ordering:

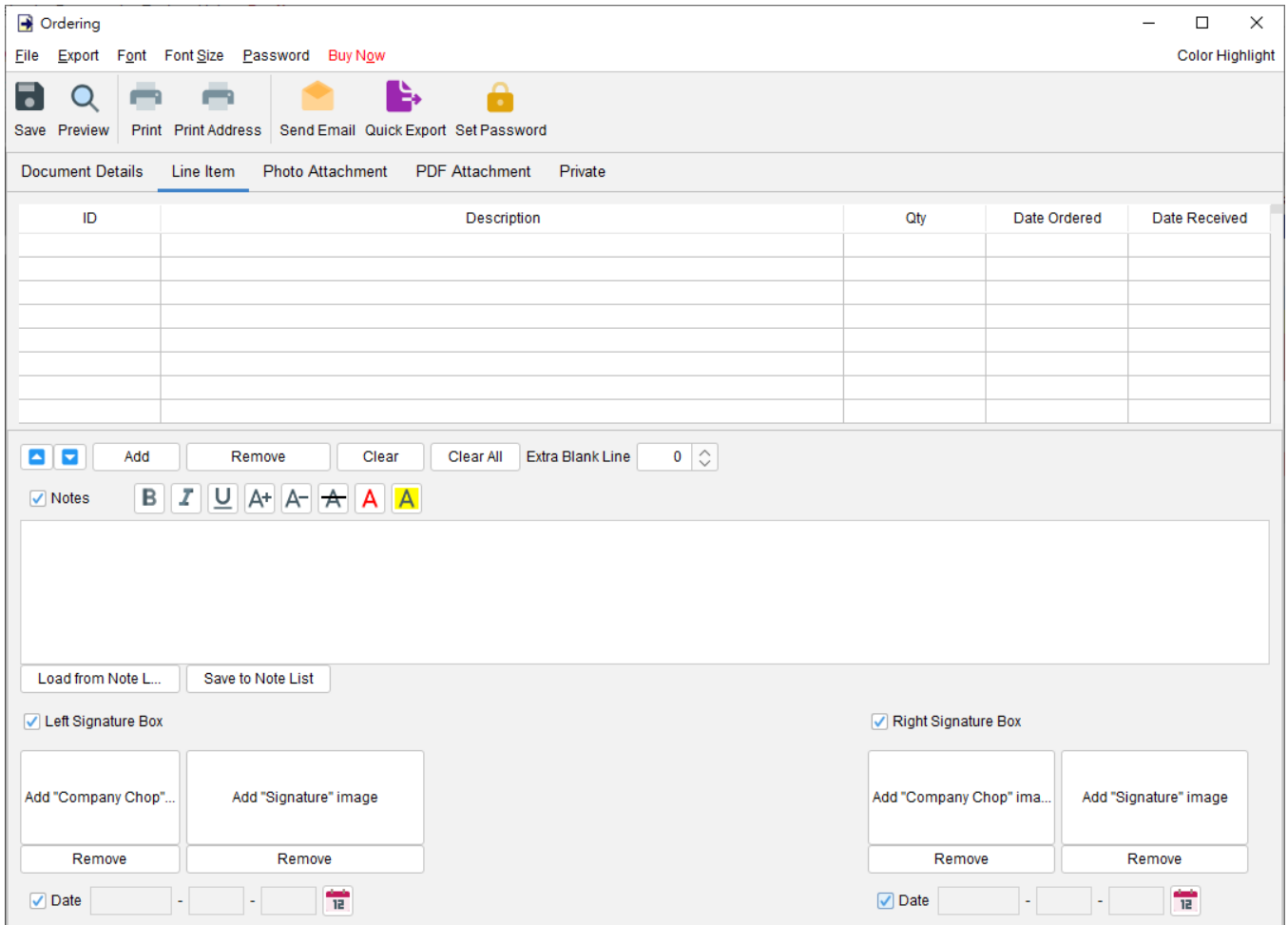
- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Ordering, includes Number, Currency, Date, Delivery Date/Time, Delivery Term and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot displays the 'Ordering' application window. The interface includes a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main content area is divided into tabs: 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab is active, showing a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt' button. Below this are input fields for 'Ordering No.' (10000), 'Date' (2023-11-08), 'Invoice No.', 'Delivery Date/Time', and 'Delivery Term'. There are also dropdown menus for 'Stamp' and 'Watermark'. A 'Notes' text area is present. The 'Customer Information' section includes 'Delivery To' and 'Address' fields, and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.



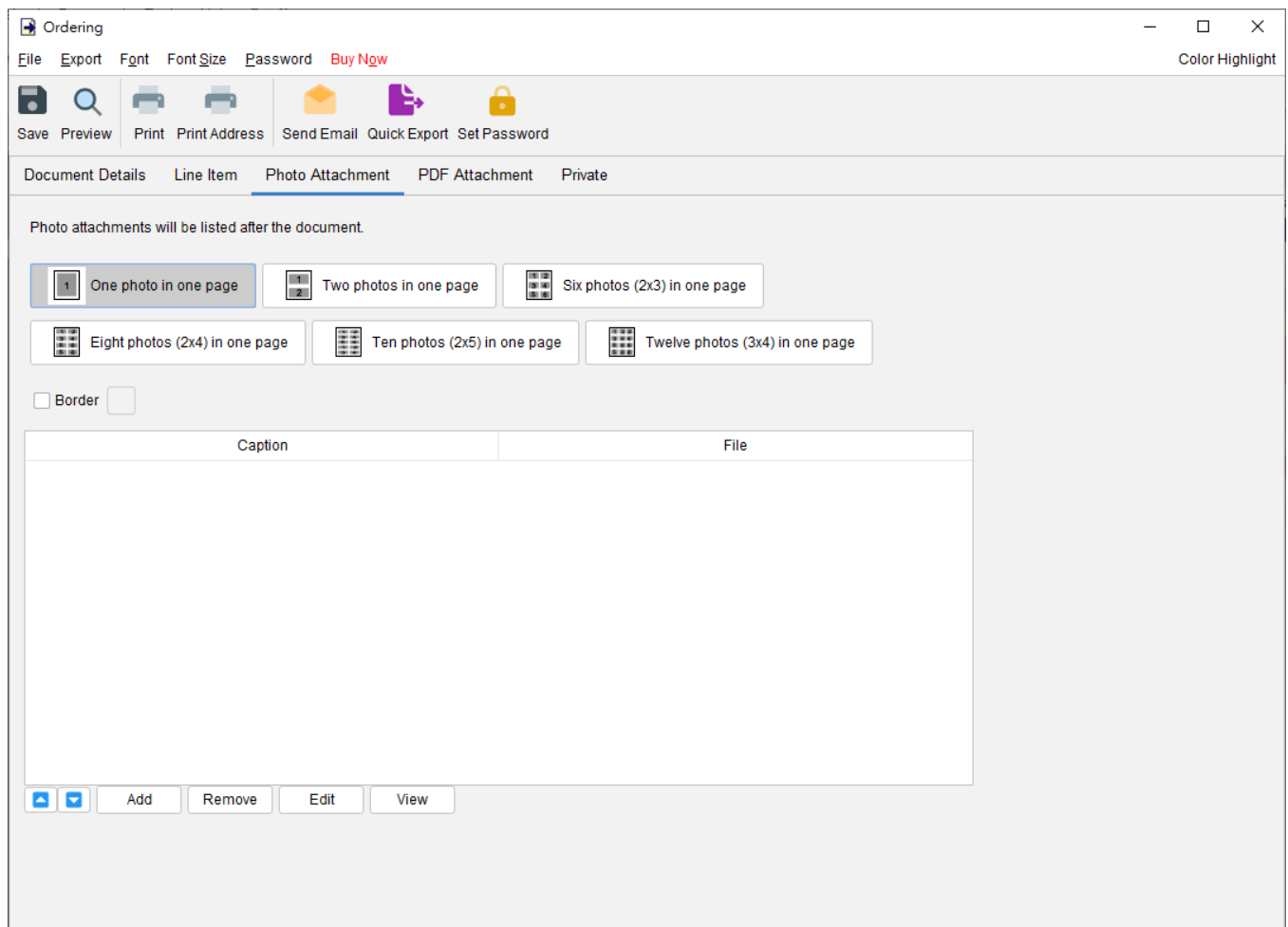
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

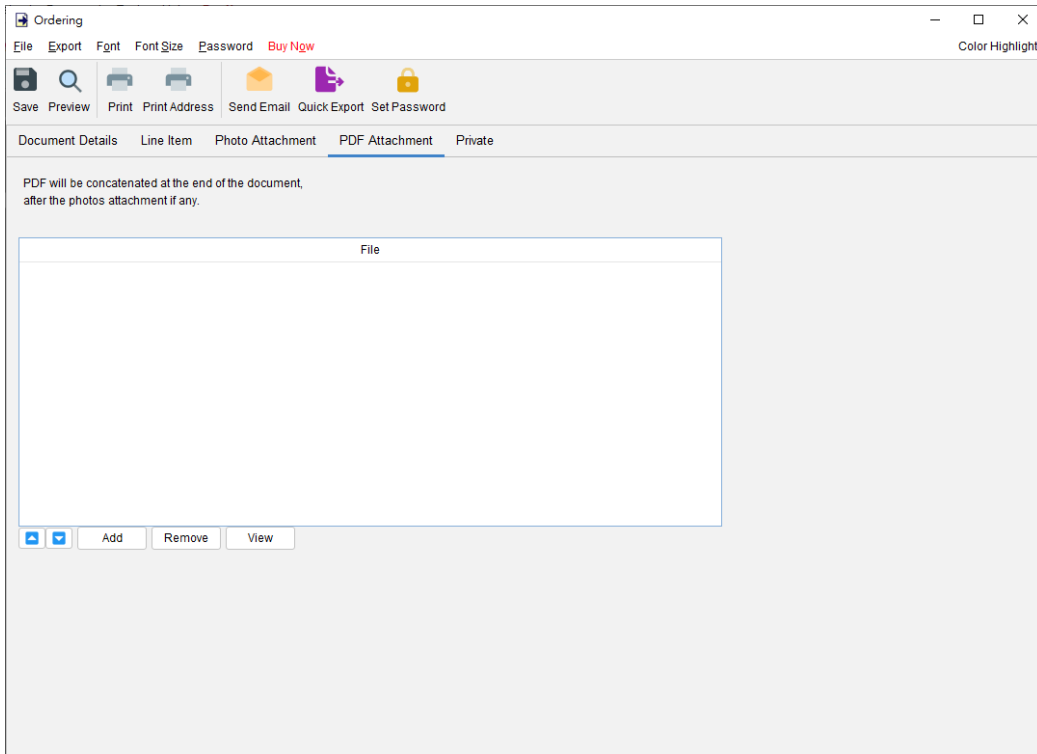
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

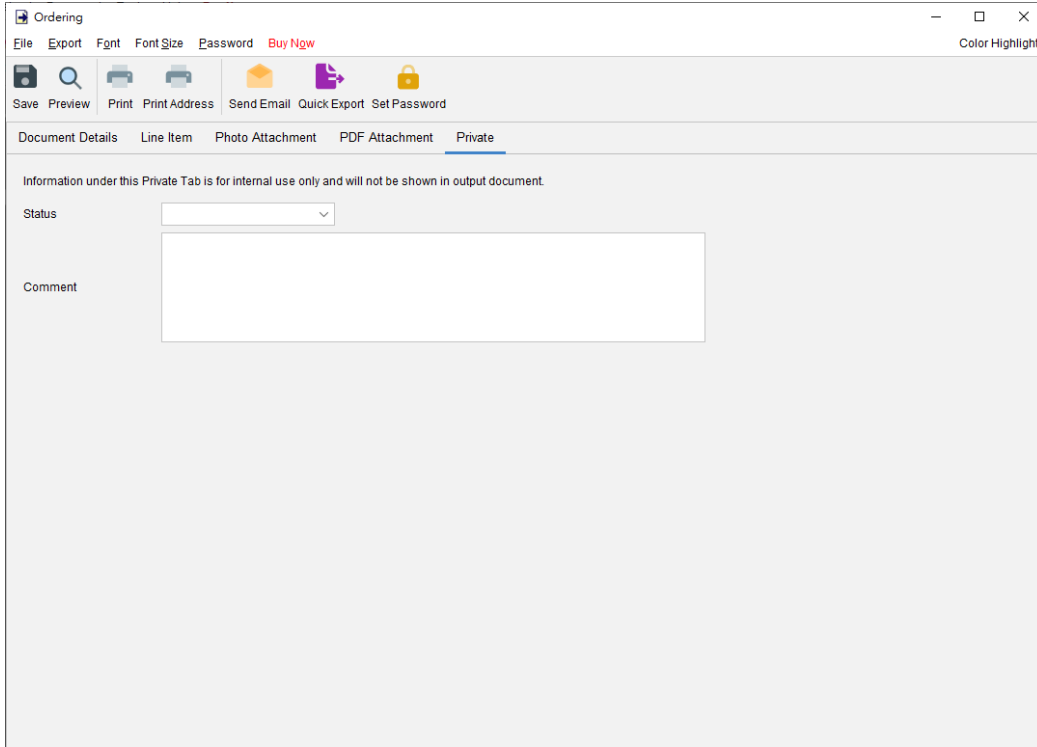
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.10. Packing List

The screenshot shows a web application window titled "Packing List". At the top is a menu bar with options: File, Export, Font, Font Size, Password, and Buy Now. Below the menu bar is a tools bar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main content area has a tabbed interface with "Document Details" selected. It includes a checkbox for "Hide empty fields in output" and a "Generate from Invoice, Tax Invoice" button. Below this are input fields for "Packing List No." (10000), "Stamp", and "Watermark". There is a date picker set to 2023-11-08. Other fields include "Invoice No.", "Ref No.", "P.O. Number", and "Salesman". A "Customer Information" section contains a "Ship To" address field and checkboxes for "Tel" and "VAT No". At the bottom right of the form are buttons for "Load from Customer List", "Save to Customer List", and "Clear".

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Packing List:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Packing List, includes Number, Currency, Date, Ref No., PO Number, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Invoice or Tax Invoice, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Packing List' application window. The title bar reads 'Packing List' with standard window controls. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar contains icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main interface has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a 'Generate from Invoice, Tax Invoice' button. The form fields include: 'Packing List No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Date' (2023-11-08), 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman' (dropdown). A 'Customer Information' section contains 'Ship To' and 'Address' (multiple lines), and checkboxes for 'Tel' and 'VAT No'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

Marks	Carton No.	Item Name/Des...	Item Code	No. of CTN	Qty Per C...	QTY	G.W. (KG)	N.W. (KG)	Length (C...	Width (CM)	Height (CM)	CBM Per ...	CBM

Buttons: Add, Remove, Clear, Clear All, Extra Blank Line (0)

Summary:

- Total Carton: 0
- Total Quantity: 0
- Total Measuremen...: 0.00
- Total Gross Weigh...: 0.00
- Total Net Weight (...): 0.00

Notes: Notes [B, I, U, A+, A-, A, A]

Signature Boxes:

- Left Signature Box: Add "Company Chop"..., Add "Signature" im..., Remove
- Right Signature Box: Add "Company Chop" ima..., Add "Signature" image, Remove

Date: Date [] - [] - [] [12]

The checkbox field is optional. Check the box will enable and show the field in the output document.

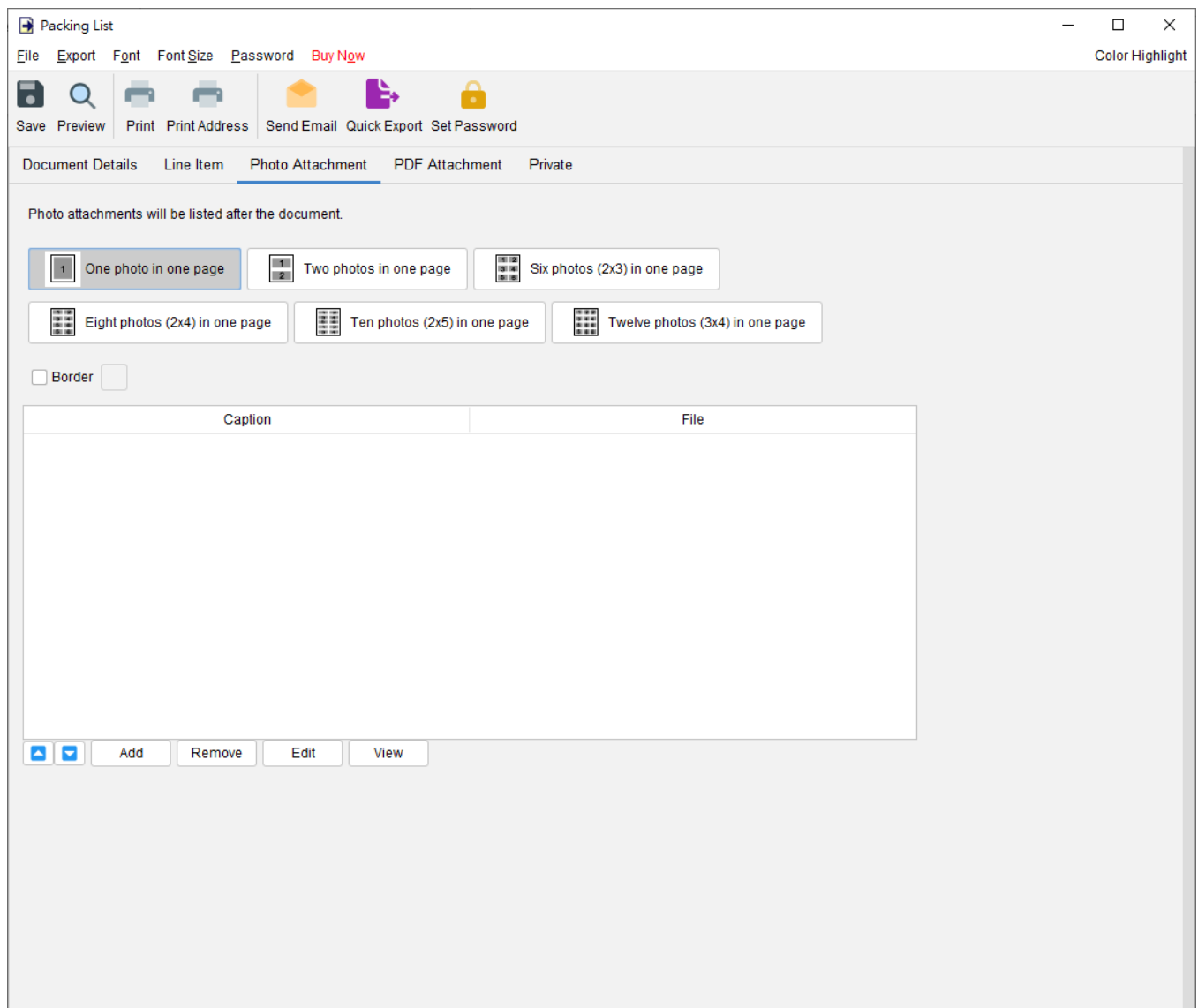
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

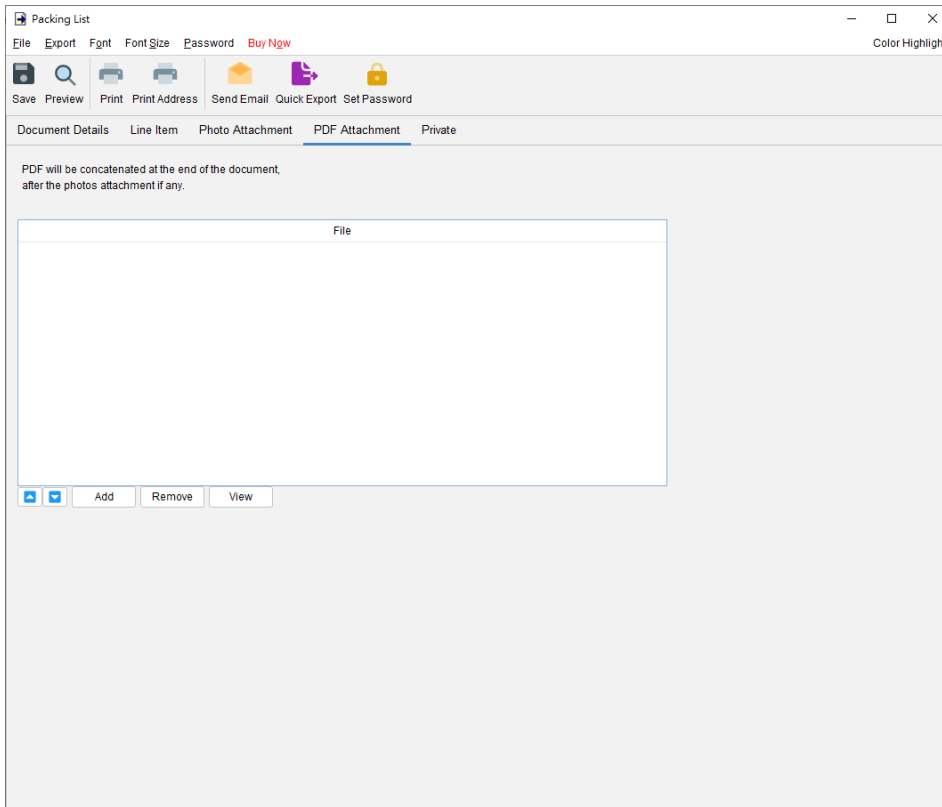
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

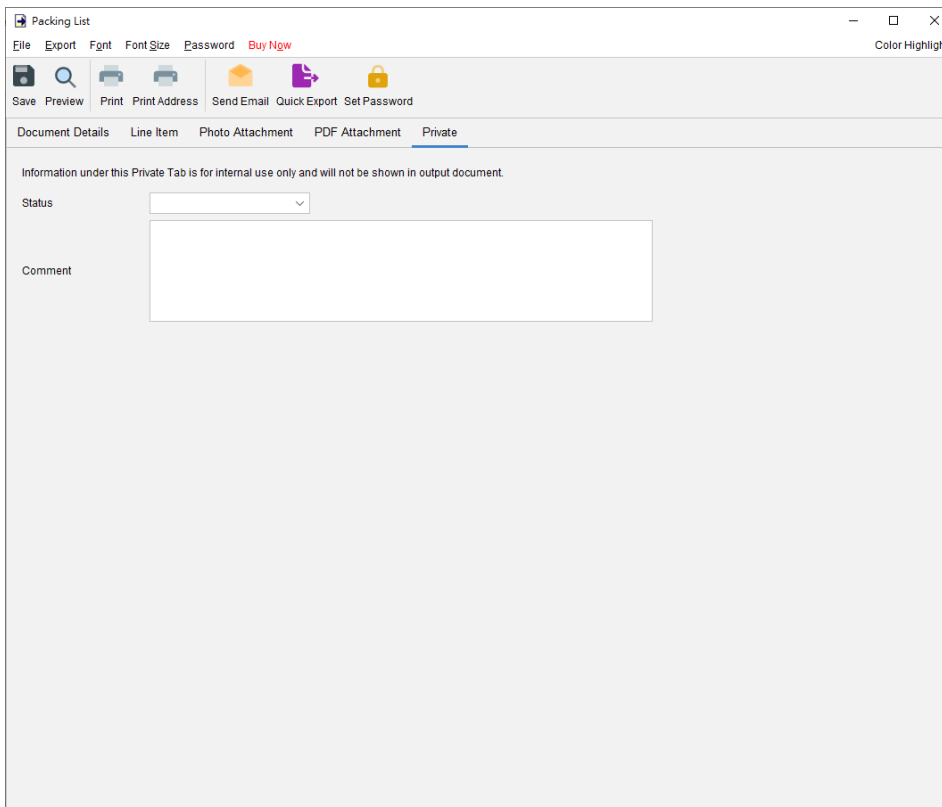
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.11. Weight List

The screenshot shows the 'Weight List' application window. The title bar reads 'Weight List'. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. Below the toolbar are tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab is active, showing a form with fields for 'Weight List No.' (10000), 'Date' (2023-11-08), 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman'. There is also a 'Customer Information' section with 'Ship To' and 'Address' fields, and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Ship To” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Weight List:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Weight List, includes Number, Currency, Date, PO Number, Sales Representative and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Invoice or Tax Invoice, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Weight List' application window. The title bar reads 'Weight List'. The menu bar includes 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. The toolbar contains icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The 'Document Details' tab is selected, showing a 'Generate from Invoice, Tax Invoice' button. The 'Weight List No.' field contains '10000'. The 'Date' field is set to '2023 - 11 - 08' (YYYY-MM-DD). Below are fields for 'Invoice No.', 'Ref No.', 'P.O. Number', and 'Salesman'. A 'Customer Information' section includes 'Ship To', 'Address', 'Tel', and 'VAT No' fields. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

ID	Description	QTY	Weight	Total Weight

The checkbox field is optional. Check the box will enable and show the field in the output document.

The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.

Weight List

File Export Font Font Size Password Buy Now Color Highlight

Save Preview Print Print Address Send Email Quick Export Set Password

Document Details Line Item **Photo Attachment** PDF Attachment Private

Photo attachments will be listed after the document.

One photo in one page Two photos in one page Six photos (2x3) in one page

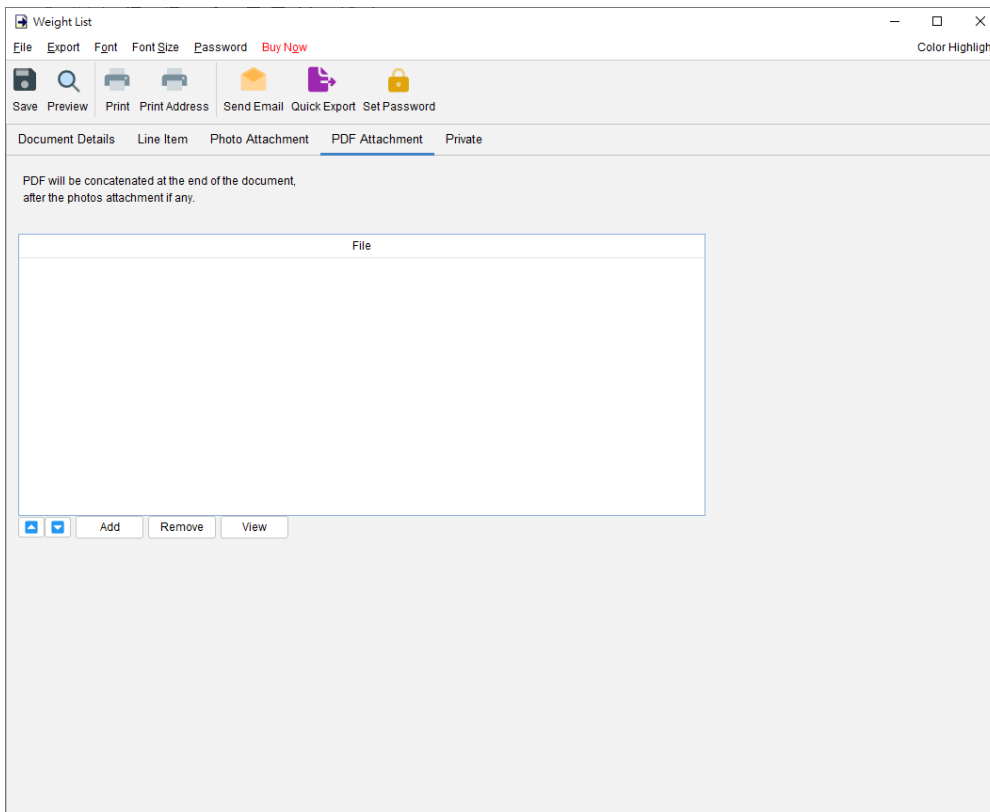
Eight photos (2x4) in one page Ten photos (2x5) in one page Twelve photos (3x4) in one page

Border

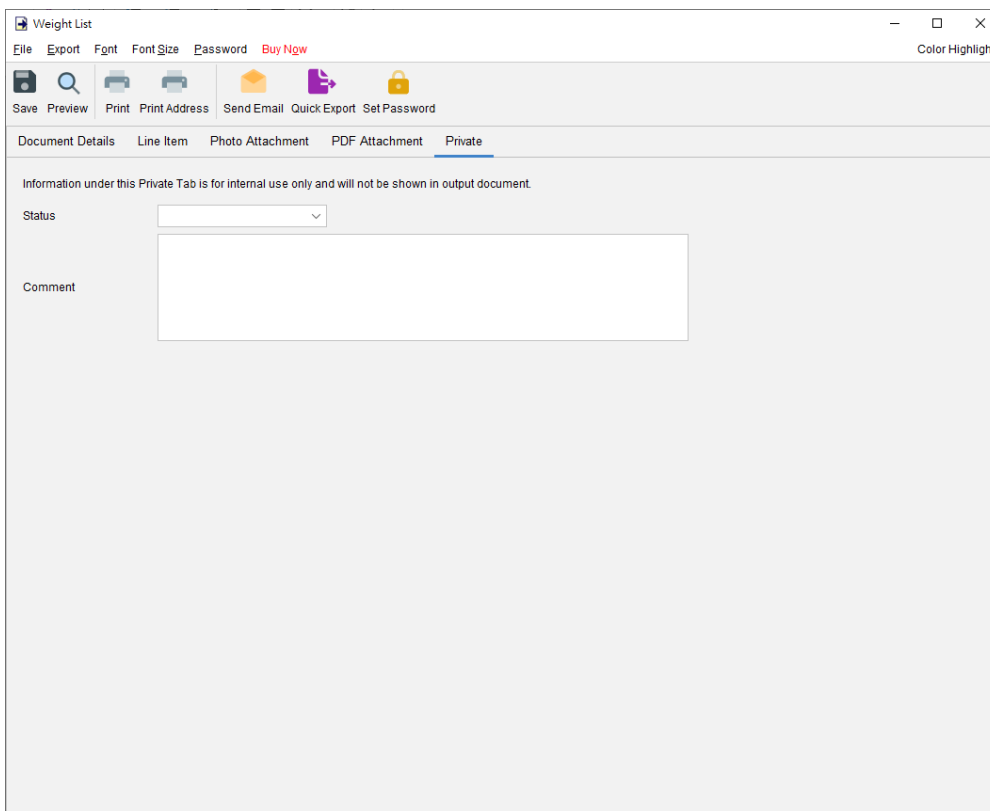
Caption	File
---------	------

Add Remove Edit View

PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.12. Credit Note

The screenshot shows the 'Credit Note' application window. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu bar is a tools bar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main interface has several tabs: 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab is active, showing a 'Hide empty fields in output' checkbox and a dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'. Below this are input fields for 'Credit Note No.' (10000), 'Stamp', 'Watermark', 'Currency' (Hong Kong Dollar, \$), and 'Date' (2023-11-08). A 'Customer Information' section contains fields for 'To' and 'Address', and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

File – Save, preview, print or close the document. It also allows to save version.

Export – Document can be exported to PDF, HTML, or Excel format.

Font, Font Size – Specify the font and font size for the document.

Password – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

Save – Save document

Preview – Preview document in PDF viewer

Print – Print document

Print Address – Print “Customer” address on envelop or address label

Send Email – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.

Quick Export – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.

Set Password – Set a password to protect the document.

There are five parts in Credit Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Credit Note, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Credit Note' application window. The title bar includes 'Credit Note' and window control buttons. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar includes icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main interface has five tabs: 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Under 'Document Details', there is a checkbox for 'Hide empty fields in output' and a dropdown menu for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt'. The 'Credit Note No.' field contains '10000'. The 'Stamp' and 'Watermark' fields are dropdown menus with '+' icons. The 'Currency' field is set to 'Hong Kong Dollar, \$'. The 'Date' field shows '2023 - 11 - 08' with a calendar icon. The 'Customer Information' section has fields for 'To' and 'Address', and checkboxes for 'Tel' and 'VAT No'. At the bottom right, there are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

The screenshot shows the 'Credit Note' application window. At the top, there is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Now'. Below the menu is a toolbar with icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The main area has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Line Item' tab is active, displaying a table with columns: ID, Description, Unit, Unit Price, Qty, and Total. The 'Total' column is highlighted in yellow. Below the table is a control panel with buttons for 'Add', 'Remove', 'Clear', 'Clear All', and 'Extra Blank Line' (set to 0). To the right, there are checkboxes for 'Total', 'Tax', and 'Tax 2', each with a corresponding yellow-highlighted value of 0.00. Below this is a 'Notes' section with a text area and formatting options (B, I, U, A+, A-, A, A). At the bottom, there are two signature boxes, each with 'Add "Company Chop"...' and 'Add "Signature" image' buttons, and 'Remove' buttons. A date field is also present at the bottom left.

The checkbox field is optional. Check the box will enable and show the field in the output document.

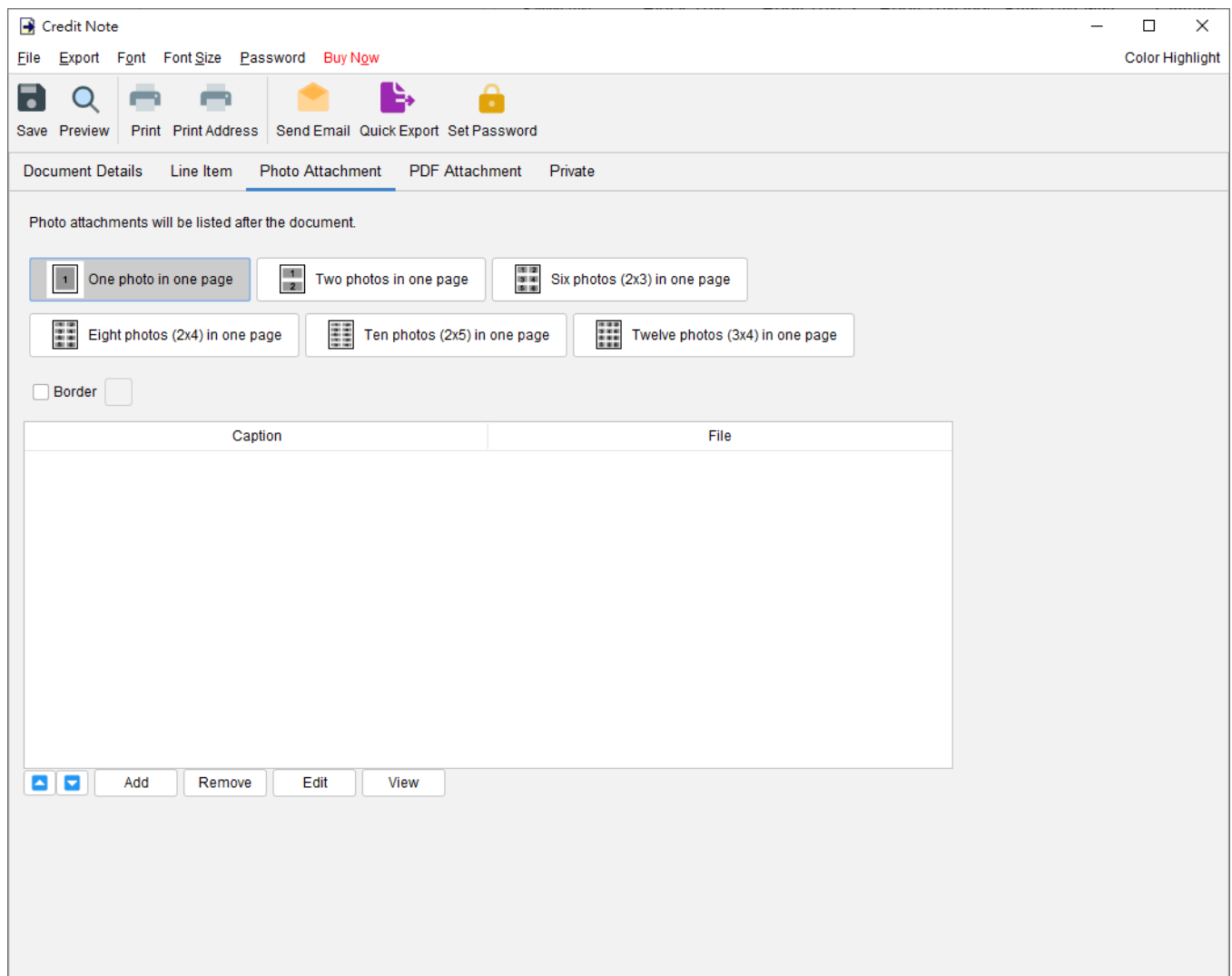
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

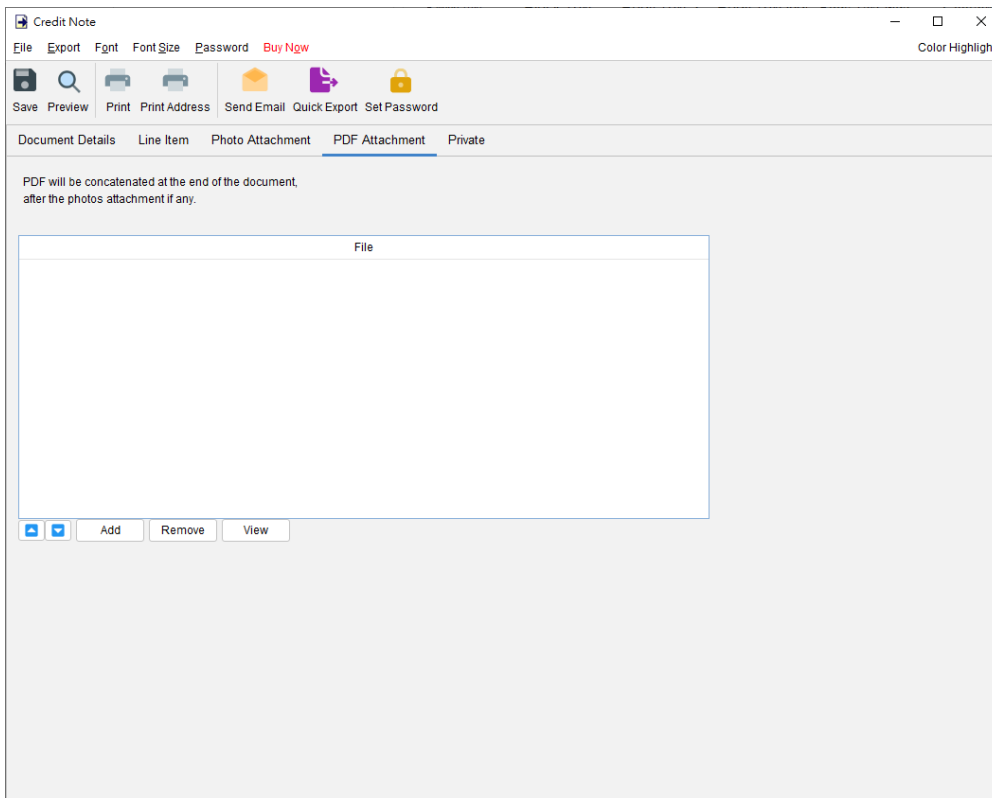
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

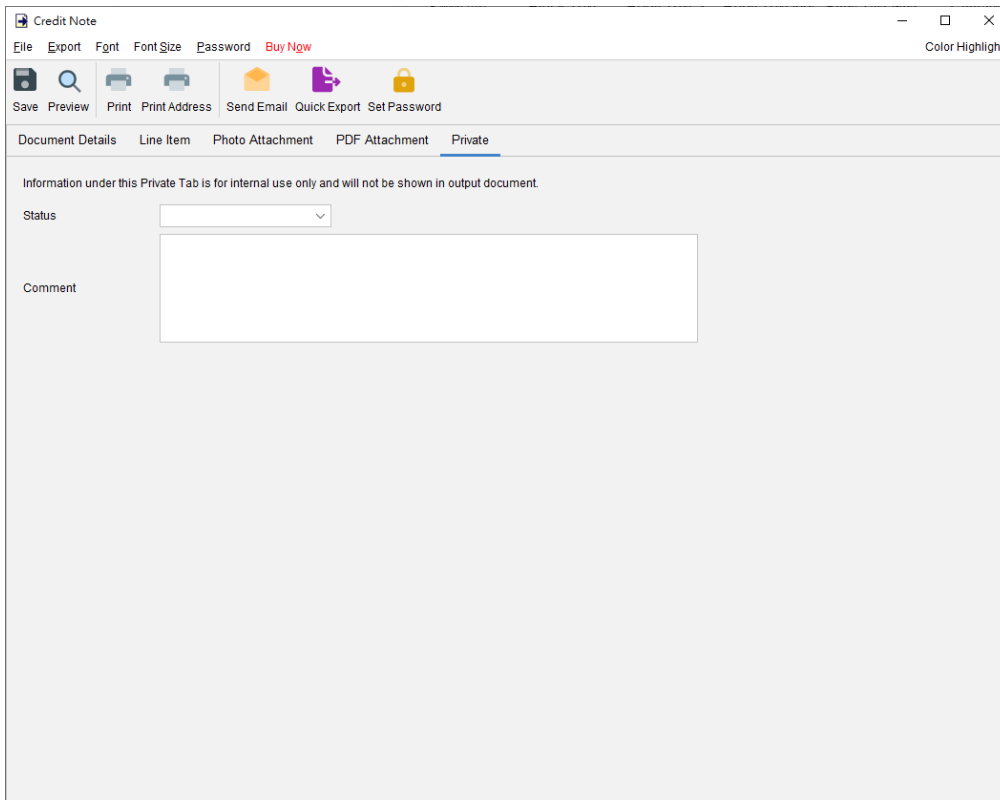
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.13. Debit Note

The screenshot shows the 'Debit Note' application window. At the top is a menu bar with 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. Below it is a tools bar with icons for 'Save', 'Preview', 'Print', 'Print Address', 'Send Email', 'Quick Export', and 'Set Password'. The main interface has tabs for 'Document Details', 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. The 'Document Details' tab is active, showing a 'Hide empty fields in output' checkbox, a text field for 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt', and input fields for 'Debit Note No.' (10000), 'Stamp', 'Watermark', 'Currency' (Hong Kong Dollar, \$), and 'Date' (2023-11-08). A 'Customer Information' section includes 'To' and 'Address' fields, and checkboxes for 'Tel' and 'VAT No'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

The **Menu Bar** at the top of the window includes:

- File** – Save, preview, print or close the document. It also allows to save version.
- Export** – Document can be exported to PDF, HTML, or Excel format.
- Font, Font Size** – Specify the font and font size for the document.
- Password** – Set a password to protect the document from access.

Below the menu bar, it features a **Tools Bar** with several buttons includes:

- Save** – Save document
- Preview** – Preview document in PDF viewer
- Print** – Print document
- Print Address** – Print “Customer” address on envelop or address label
- Send Email** – Export the document in selected format and load the email client software to send email. Email client can be set in menu “Settings > Email client”.
- Quick Export** – One-click button to export the document in selected format into folder. Settings can be made in menu “Settings > Quick Export”.
- Set Password** – Set a password to protect the document.

There are five parts in Debit Note:

- Document Details
- Line Item
- Photo Attachment
- PDF Attachment
- Private

Document Details – Specify the header information of the Debit Note, includes Number, Currency, Date, and Customer Information. Customer Information can be typed in directly or load from the Customer List. It also allows to add a stamp or grayscale watermark on to the document, such as Confidential, Revised, Draft.

If you want to load data from Quotation or another document, you may click [Generate] button at the top and choose the document from the popup document list.

The screenshot shows the 'Debit Note' application window. The title bar includes 'Debit Note' and window control buttons. The menu bar contains 'File', 'Export', 'Font', 'Font Size', 'Password', and 'Buy Ngw'. The toolbar includes icons for Save, Preview, Print, Print Address, Send Email, Quick Export, and Set Password. The 'Document Details' tab is active, showing a 'Generate from Quotation, Proforma Invoice, Invoice, Tax Invoice, Receipt' button. Below this are input fields for 'Debit Note No.' (10000), 'Stamp' (dropdown), 'Watermark' (dropdown), 'Currency' (Hong Kong Dollar, \$), and 'Date' (2023-11-08). The 'Customer Information' section has fields for 'To' and 'Address', and checkboxes for 'Tel' and 'VAT No'. At the bottom right are buttons for 'Load from Customer List', 'Save to Customer List', and 'Clear'.

Line Item – Line Item or product information can be input here. Line Item can be added by typing in the table directly or clicking [Add] button to load from the Item List. The value in highlighted cell (Yellow) will be calculated automatically.

The checkbox field is optional. Check the box will enable and show the field in the output document.

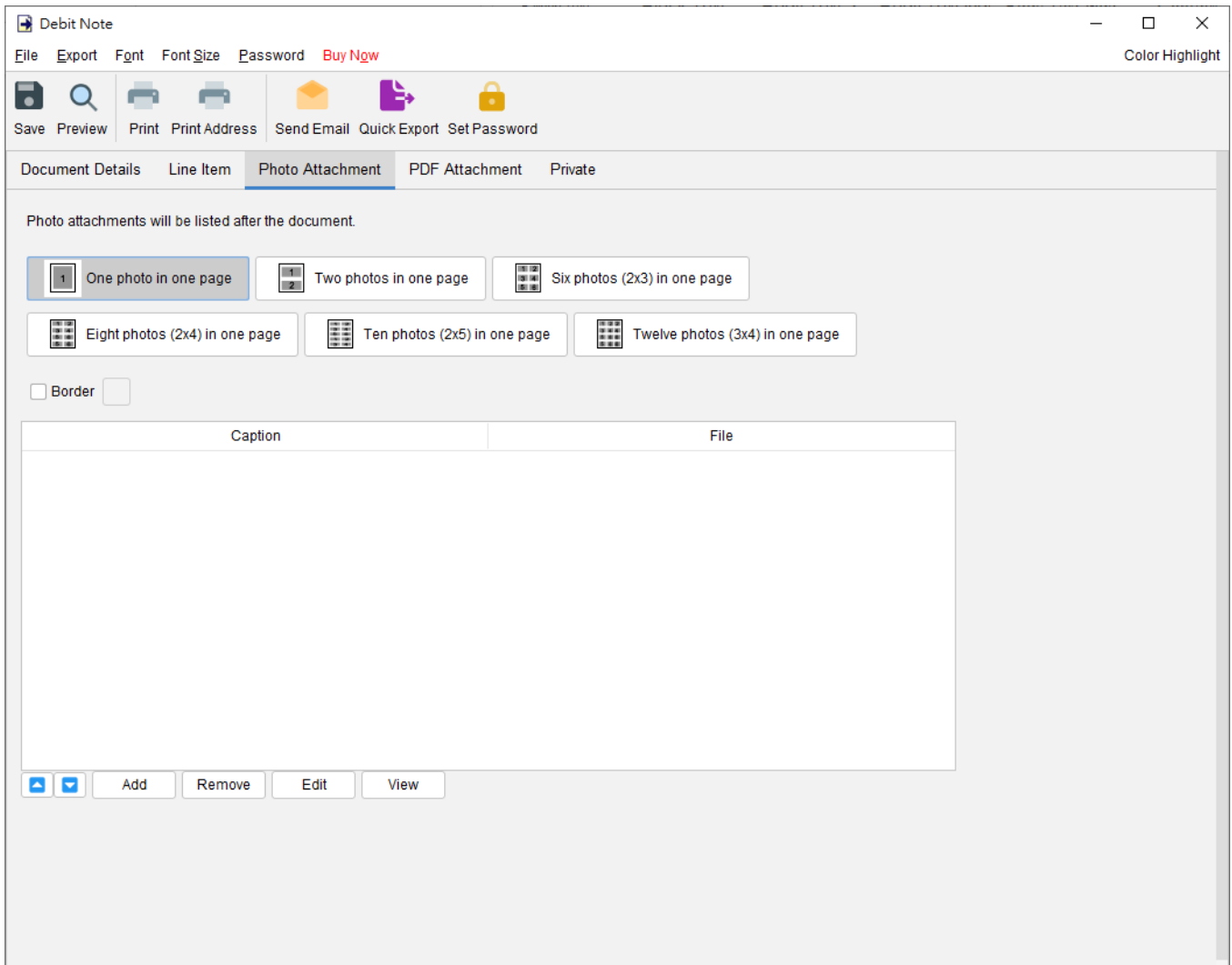
The "Notes" field allows to input additional information about the document and it also supports text formatting.

Two optional signature boxes are provided at the bottom of the document. You may add "Company Chop" and "Signature" images (300x300pixel) into the document. The chop/signature in output document is about 25mm in height.

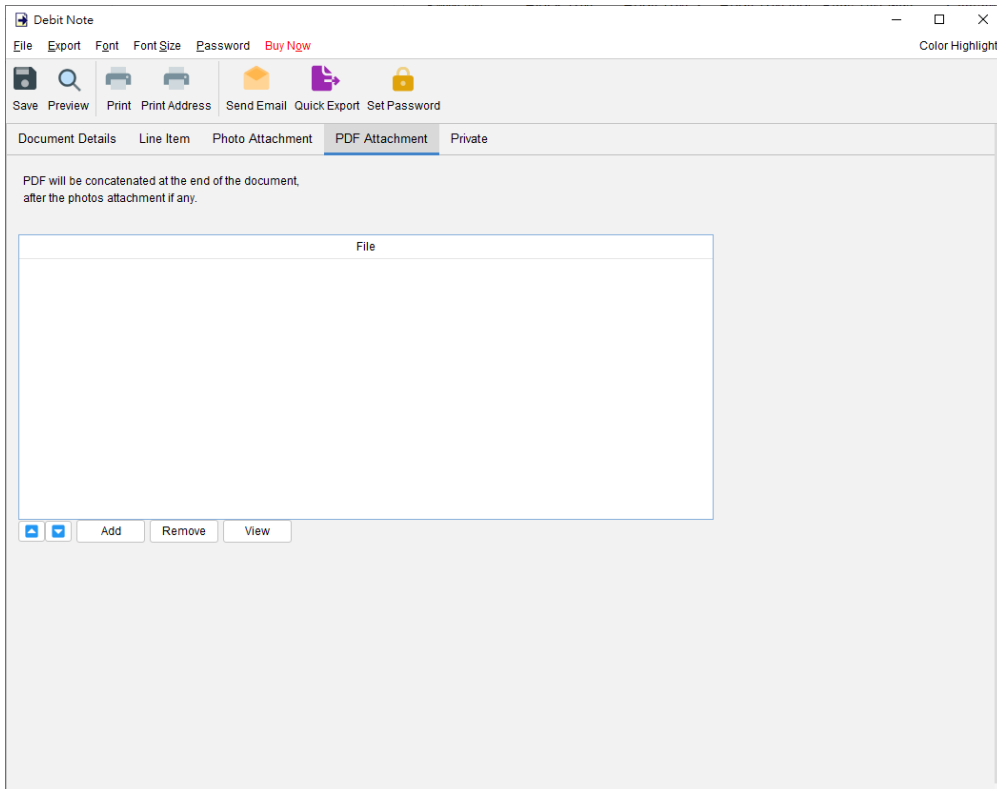
Photo Attachment – Photos can be attached to the end of quotation. Six layouts are provided to list the photos:

- One photo in one page
- Two photos in one page
- Six photos (2x3) in one page
- Eight photos (2x4) in one page
- Ten photos (2x5) in one page
- Twelve photos (3x4) in one page

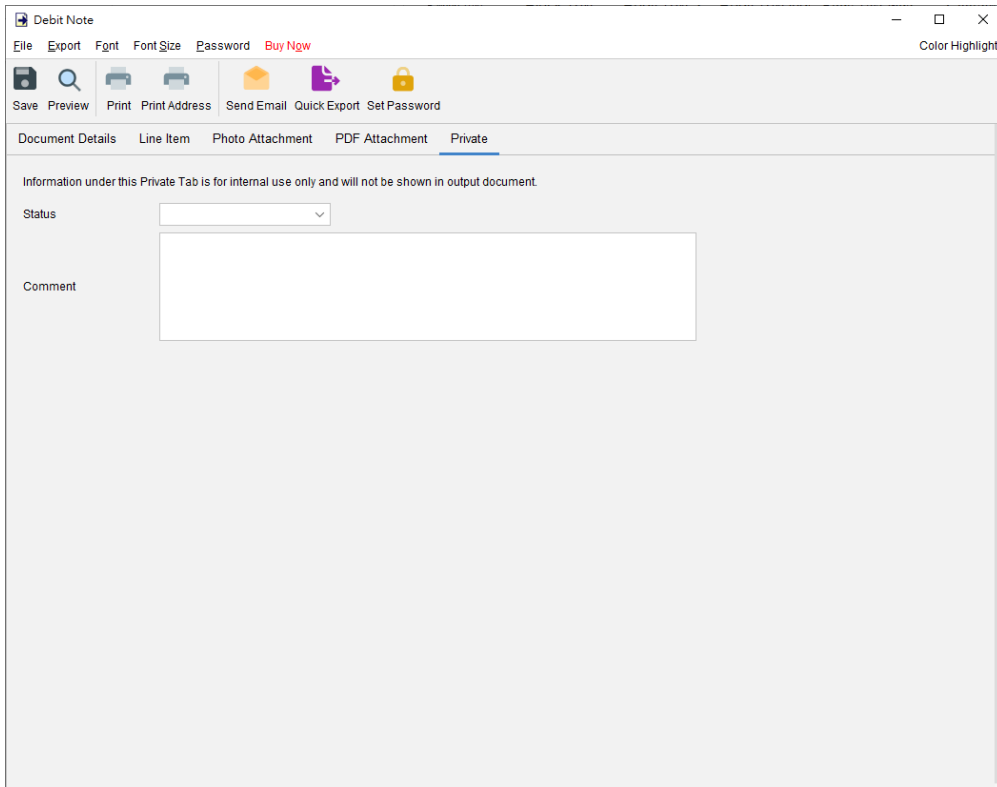
Click the [Add] button at bottom to add photo. It also allows to add caption under the photo.



PDF Attachment – PDF file can be appended to the PDF output of document.



Private – You can specify document status and type comments under private tab. Information under private tab will not be shown in the output.



4.14. Batch Create

The Batch Create function allows you to create documents for multiple customers with the same content. It has a similar user interface to a normal document, but it allows you to add multiple customers. You can add customers by selecting a Customer Category, selecting individual customers from the Customer List, or inputting customer information manually.

When the document is ready, click the [Batch Create] button at the top. EasyBilling will generate an individual document for every customer.

The screenshot shows the 'Batch Create' interface for a 'Quotation' document. The window title is 'Quotation' and it includes a menu bar with 'File', 'Font', 'Font Size', and 'Buy Now'. Below the menu bar are icons for a folder and a magnifying glass, and the text 'Batch Create Preview'. The main content area has a tabbed interface with 'Document Details' selected. Under 'Document Details', there is a checkbox for 'Hide empty fields in output'. The form includes fields for 'Quote No.' (QUO-202311-10002), 'Stamp', 'Watermark', 'Currency' (Hong Kong Dollar, \$), 'Date' (2023-11-08), 'Sales Rep.', 'Customer Ref. No.', 'Shipping Date', 'Shipping Term', and 'Payment Term'. Each dropdown menu has a green '+' icon. At the bottom, there is a 'Customer Information' section with buttons for '+ By Category', '+ By Customer', '+ Manual', 'Edit', and 'Remove'. Below these buttons is a table with columns for 'Quote To', 'Address', 'Ship To', and 'Address'.

Quote To	Address	Ship To	Address
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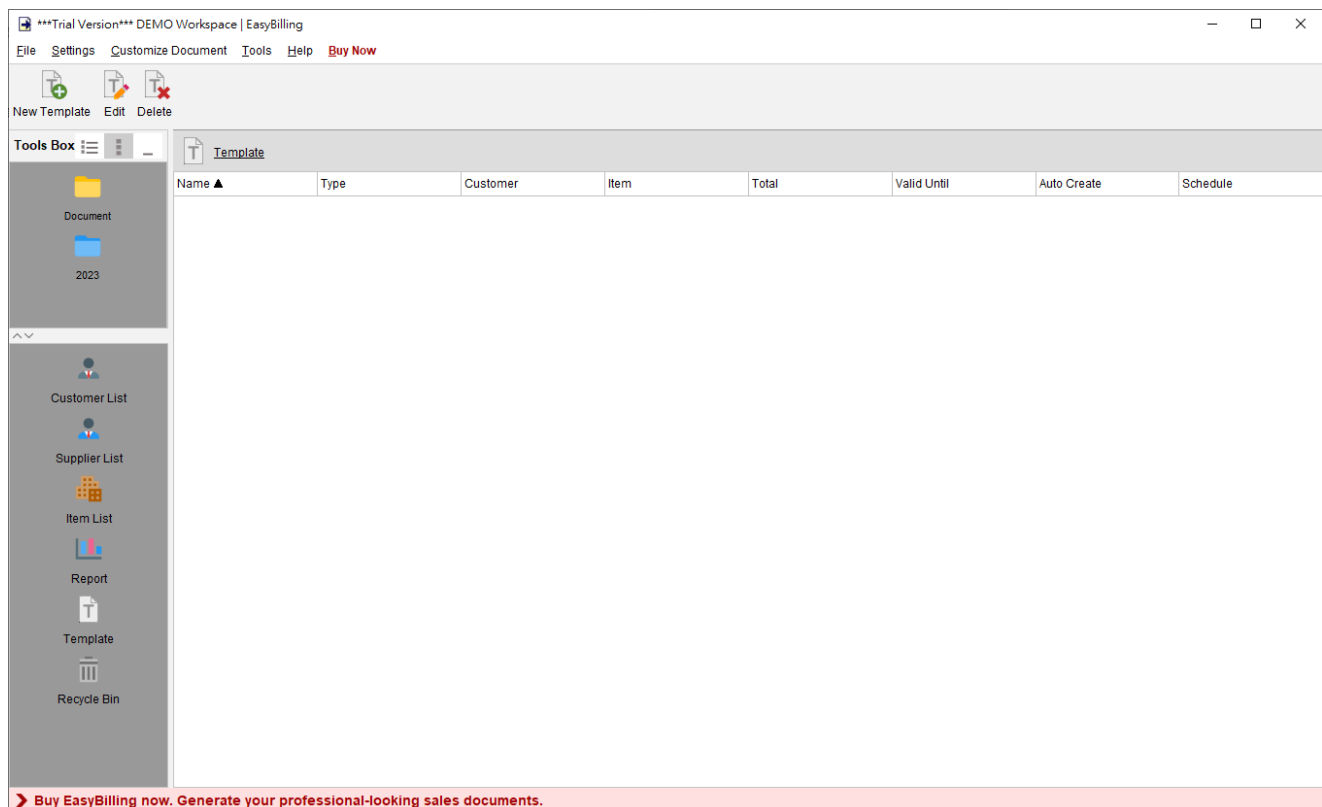
5. TEMPLATE

EasyBilling provides a Template feature that allows you to store information in a document as a template. This template can be easily recalled when preparing a document. Additionally, it includes an Auto Create function that can be scheduled to automatically generate documents from the template on a weekly or monthly basis.

If you frequently create the same document, such as for monthly or recurring transactions, you can create a template that stores all essential information. This includes the Customer Name, Document details, Item details and pricing information, as well as Photo and PDF attachments. Using these templates eliminates the need to re-enter information each time you create a document. Furthermore, the Template feature supports the Auto Create function, enabling automatic document generation according to a specified schedule.

5.1. Template List

To access the Template List, click on the [Template List] icon located on the left-hand side of the main screen. The Template List allows you to manage your templates, making them easily accessible when preparing your documents.



5.2. Create Template

To create a template, click the "New Template" button and select the document type. In the template window, the first tab contains the details of the template. You should provide a name for easy reference when recalling the template. You can also set a validity period to limit the use of the template or choose to mark it as "Never Expire."

Quotation Template

File Font Font Size Buy Now Color Highlight

Save Preview

Template Document Details Line Item Photo Attachment PDF Attachment Private

Name :

Valid Till : Never Expire / / (YYYY/MM/DD)

Auto Create

Auto Create

Folder :

Schedule : Every month on day Every week on Custom

Notification : Show notification if the document is created
 Show notification if the document cannot be created

Log :

Auto Create

Auto Create

Auto Create

Folder : Document

Schedule : Every 3 month on day 1 [?]

Every 1 week on Monday

Custom

(Next document will be created on 01-03-2025)

Notification : Show notification if the document is created

Show notification if the document cannot be created

Log : View Log

The Auto Create feature automates document generation on a schedule. Choose weekly, monthly, or any custom interval (e.g., every other week, every three months).

You can specify the exact day of the month or the day of the week for document creation. Documents will be generated automatically based on the configurations in the template. Please note that if you select the 30th or 31st for monthly scheduling, on shorter months like February, April, June, September, or November, document will be created on the last day of the month instead.

Additionally, all auto-created documents will be logged in the records, providing a clear audit trail for future reference. Notifications can be set up to alert you when an Auto Document is created. These notifications will display the templates being processed and the number of documents generated.

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For the other tab pages, they are similar to what you see when preparing a normal document. You can specify document details such as Payment Terms, Shipping Information, Customer Information, Line Items, pricing information, and other elements like Photo and PDF attachments. However, you cannot set the document date and number in the template; these two pieces of information will be assigned when you prepare the document.

The screenshot displays the 'Invoice Template' application window. The 'Document Details' tab is active, showing various input fields for invoice information. At the top, there is a menu bar with 'File', 'Font', 'Font Size', and 'Buy Now'. Below the menu bar are 'Save' and 'Preview' buttons. The main content area is divided into several sections:

- Template Selection:** A dropdown menu with options: 'Template', 'Document Details' (selected), 'Line Item', 'Photo Attachment', 'PDF Attachment', and 'Private'. Below this is a checkbox for 'Hide empty fields in output' and a text box containing 'Load from Template / Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note'.
- Invoice No.:** A text input field with a pencil icon for editing.
- Stamp:** A dropdown menu with a green '+' button.
- Watermark:** A dropdown menu with a green '+' button.
- Currency:** A dropdown menu set to 'United States Dollar, \$' with a green '+' button.
- Date:** A date picker set to '(DD-MM-YYYY)' with a calendar icon.
- Order No.:** A text input field.
- Sales Rep.:** A dropdown menu with a green '+' button.
- Shipping Date:** A date picker with a calendar icon.
- Shipping Term:** A dropdown menu with a green '+' button.
- Payment Term:** A dropdown menu with a green '+' button.

The 'Customer Information' section is divided into two columns:

- Bill To:** A vertical stack of text input fields for name and address. It includes checkboxes for 'Tel' (checked) and 'VAT No' (unchecked).
- Ship To:** A vertical stack of text input fields for name and address. It includes checkboxes for 'Tel' (checked) and 'VAT No' (unchecked).

Between the two columns are two blue double-headed arrow buttons. At the bottom right of the 'Customer Information' section are three buttons: 'Load from Customer List', 'Save to Customer List', and 'Clear'.

5.3. Prepare document from Template

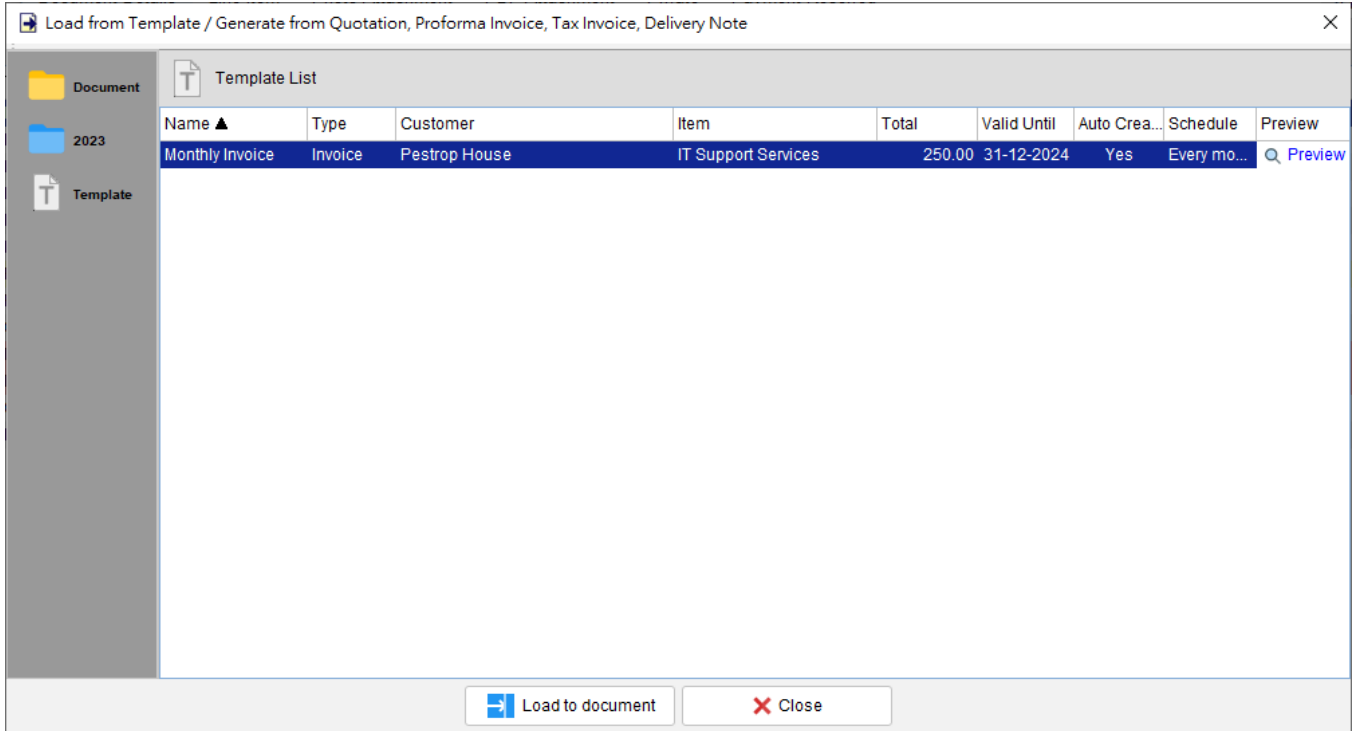
When preparing a document, if you want to load from a template, click the [Load from Template] button at the top of the document screen.

The screenshot shows the 'Invoice' window with the following details:

- Document Details** (selected tab):
 - Hide empty fields in output
 - Load from Template / Generate from Quotation, Proforma Invoice, Tax Invoice, Delivery Note
 - Invoice No.: INV2024-10037
 - Currency: United States Dollar, \$
 - Date: 09 - 10 - 2024 (DD-MM-YYYY)
 - Order No.:
 - Sales Rep.:
 - Shipping Date:
 - Shipping Term:
 - Payment Term:
- Customer Information**:
 - Bill To** (Address fields):
 - Tel
 - VAT No
 - Ship To** (Address fields):
 - Tel
 - VAT No
- Buttons: Load from Customer List, Save to Customer List, Clear

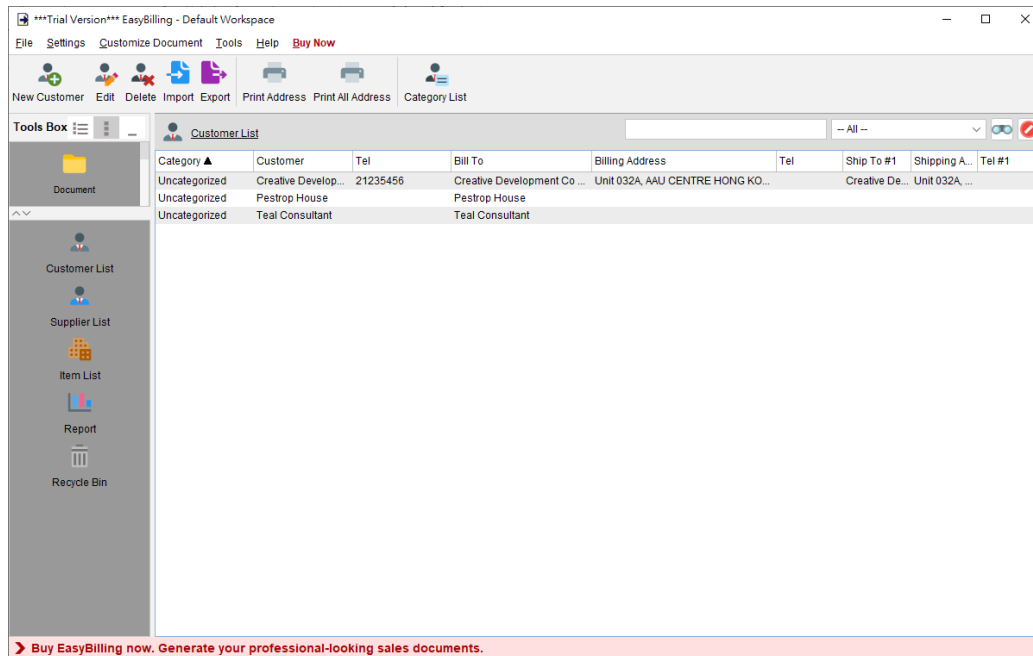
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A window will pop up, and you should see the "Template" button on the left. Clicking the "Template" button will display a list of all available templates that match the document type. You can select a template and load it into your document. All the information in the template will be loaded into the document.



6. CUSTOMER LIST

On the main screen of EasyBilling, you can access the Customer List by clicking on the [Customer List] icon located on the left-hand side.



The Customer List serves as a repository for storing all customer information. When preparing a document, you have the option to load customer information directly from the Customer List.

The Tool Bar in the Customer List provides several useful functions, including:

New: Add a new customer to the list.

Edit: Modify the details of the selected customer.

Delete: Remove the selected customer from the list.

Import: Import customers from an XLS file.

Export: Export the entire customer list into PDF, XLS, or HTML format.

Print Address: Print the address of the selected customer on a label.

Print All Address: Print the addresses of all customers on labels.

Category List: Manage customer categories for better organization and classification.

Within the Customer List, customers are displayed in a table format, providing a clear overview of their information. You may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling you to quickly locate specific customers by entering relevant search terms.

6.1. Create Customer

When creating a new customer, you can navigate to the "General" tab and input the customer's name and contact information. Customers can also be assigned to a specific group, facilitating efficient search or batch document creation. Furthermore, you can specify preferences for shipping terms, payment terms, item categories, and sales discounts for each customer. These preferences will be automatically applied when preparing documents for the respective customer.

The screenshot shows the 'Customer' dialog box with the 'General Info' tab selected. The 'Category' dropdown is set to 'Uncategorized'. There are input fields for 'Customer', 'Tel', 'Fax', and 'Email'. The 'Preferences' section includes dropdowns for 'Shipping Term', 'Payment Term', and 'Item Category', and a text input for 'Sales Discount %' set to '0.00'. At the bottom, there are 'Save' and 'Cancel' buttons.

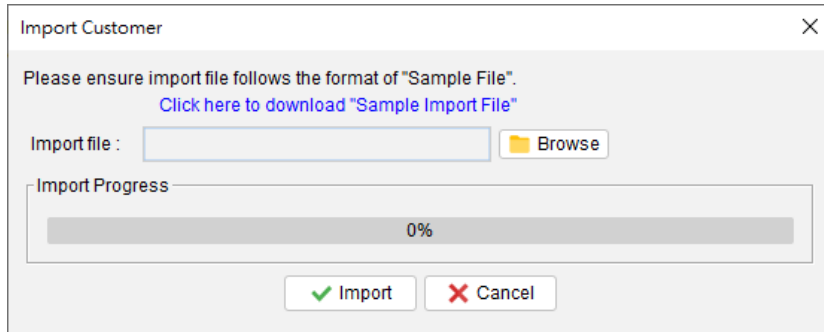
In the "Address" tab, you can enter the "Bill To" and "Ship To" addresses for the customer. It is possible to input up to three shipping addresses. The address information entered in this section will be automatically loaded when creating documents for the customer, streamlining the workflow and ensuring accurate details.

The screenshot shows the 'Customer' dialog box with the 'Address' tab selected. It features a 'Bill To Information' section with fields for 'Bill To', 'Billing Address', 'Tel', and 'Vat No'. Below this is a 'Ship To Information' section with three columns for 'Address #1', 'Address #2', and 'Address #3'. Each column has fields for 'Ship To', 'Shipping Address', 'Tel', and 'Vat No'. At the bottom, there are 'Save' and 'Cancel' buttons.

6.2. Import Customer

EasyBilling offers the capability to import customers from an Excel file, providing a convenient method for bulk importing customer information.

To successfully import customers, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.

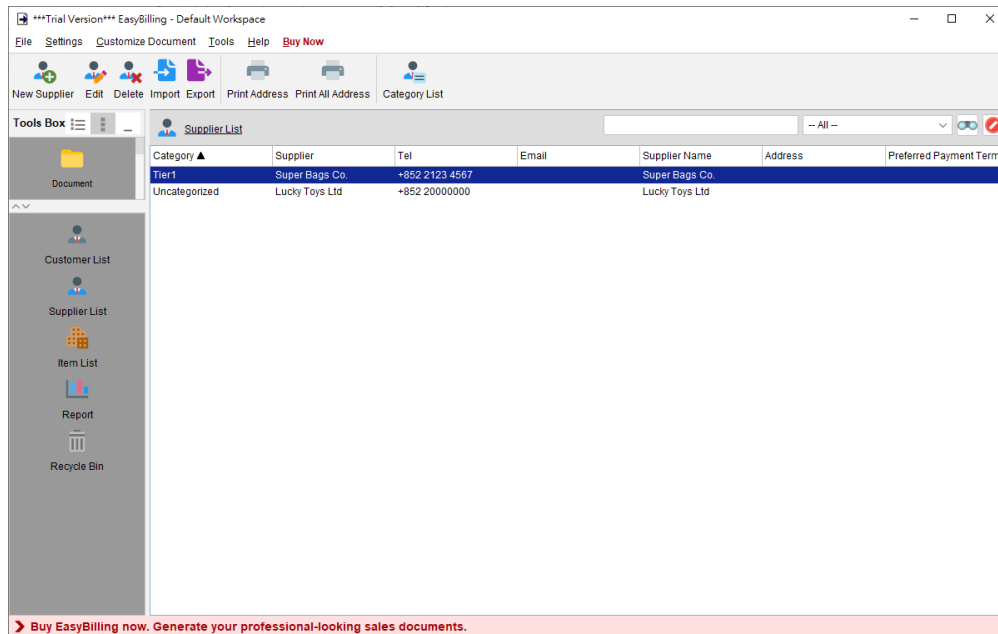


In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Customer information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific customer, the corresponding cell can be left empty.

	A	B	C	D	E	F	G	H
1	Category	Customer	Phone	Fax	Email	Bill To	Billing Address	Billing Tel
							Unit 001 ABCD Road JKL District MNO Province 00001	
2	Uncategorized	Alan Smith	21234567	31234567	001@abc.com	ABC Cor TUV Country		812345
3	Uncategorized	Robert Lee	23456789	33456789	002@def.com	DEF Cor 002 Unit		833456
4	Uncategorized	Richard	24567890	34567890	003@ghi.com	GHI Com 003 Unit		845678
5								
6								
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17								

7. SUPPLIER LIST

On the main screen of EasyBilling, you can access the Supplier List by clicking on the [Supplier List] icon located on the left-hand side.



The Supplier List serves as a repository for storing all supplier information. When preparing a Purchase Order, you have the option to load supplier information directly from the Supplier List.

The Tool Bar in the Supplier List provides several useful functions, including:

New: Add a new supplier to the list.

Edit: Modify the details of the selected supplier.

Delete: Remove the selected supplier from the list.

Import: Import suppliers from an XLS file.

Export: Export the entire supplier list into PDF, XLS, or HTML format.

Print Address: Print the address of the selected supplier on a label.

Print All Address: Print the addresses of all suppliers on labels.

Category List: Manage supplier categories for better organization and classification.

Within the Supplier List, suppliers are displayed in a table format, providing a clear overview of their information. You may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling you to quickly locate specific suppliers by entering relevant search terms.

7.1. Create Supplier

When creating a new supplier, you can input the supplier's name and contact information. Supplier can also be assigned to a specific group, facilitating efficient search or batch document creation. Furthermore, you can specify preferences for payment terms for each supplier. These preferences will be automatically applied when preparing documents for the respective supplier.

The screenshot shows a 'Supplier' form with the following fields and sections:

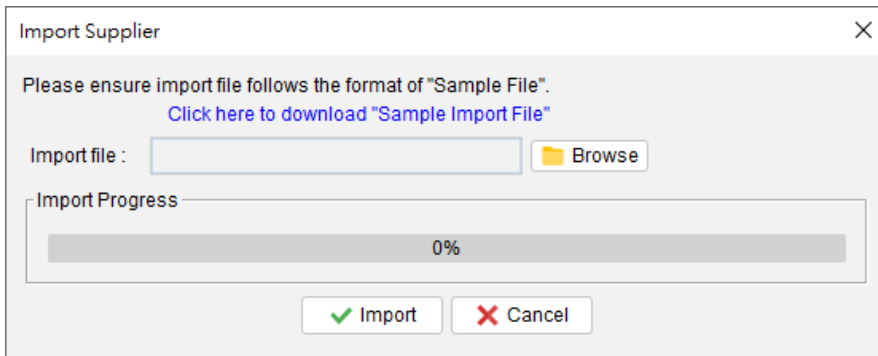
- Category :** A dropdown menu currently showing 'Uncategorized'.
- Supplier :** A text input field.
- Tel :** A text input field.
- Fax :** A text input field.
- Email :** A text input field with an envelope icon to its right.
- Preferred Payment Term :** A dropdown menu.
- Notes :** A large text area for notes.
- Supplier Information** (Section Header):
 - Supplier Name :** A text input field.
 - Address :** A multi-line text input field.
 - Tel :** A text input field.
 - Vat No :** A text input field.

At the bottom of the form, there are two buttons: a green checkmark icon followed by the text 'Save', and a red 'X' icon followed by the text 'Cancel'.

7.2. Import Supplier

EasyBilling offers the capability to import suppliers from an Excel file, providing a convenient method for bulk importing supplier information.

To successfully import suppliers, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.

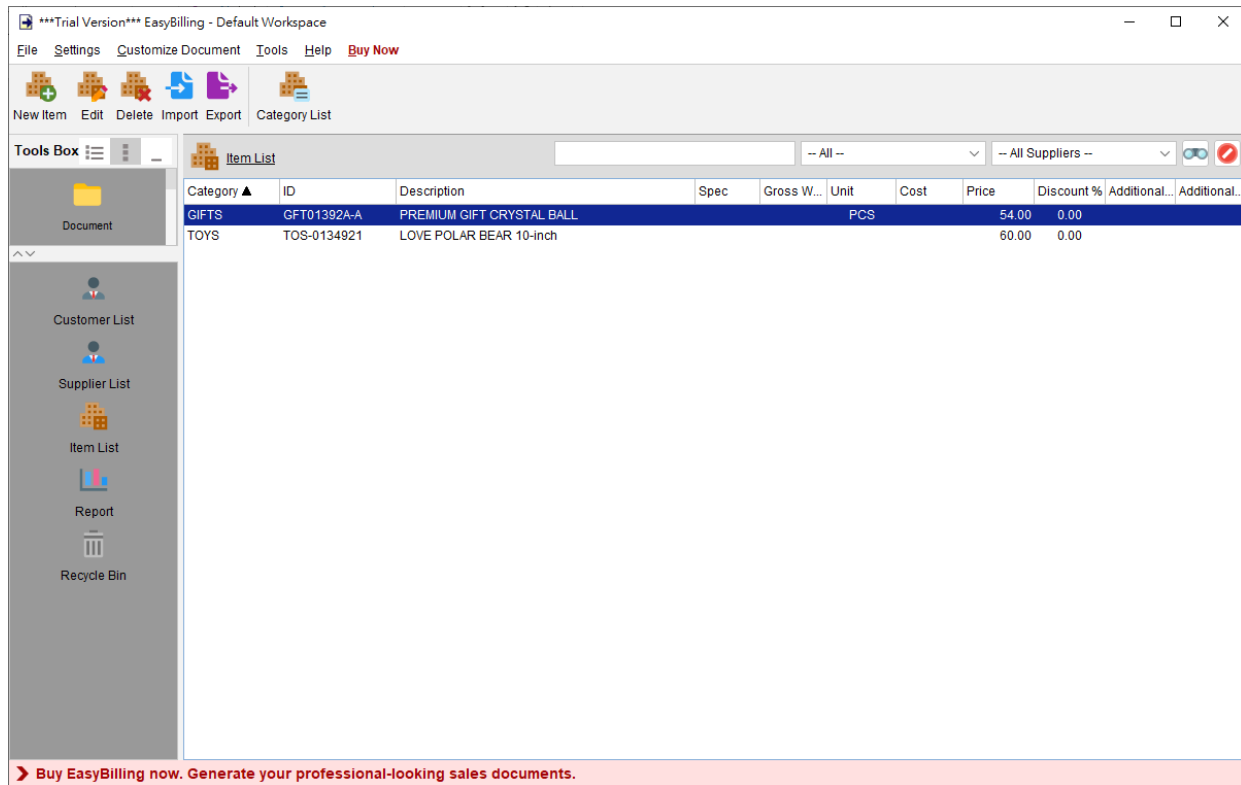


In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Supplier information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific supplier, the corresponding cell can be left empty.

	A	B	C	D	E	F	G
1	Category	Supplier	Phone	Fax	Email	Supplier Name	Address
2	Uncategorized	Company ABC	21234567	31234567	001@abc.com	Mr. 001	001 Co
3	Uncategorized	Company DEF			002@abc.com	Mr. 002	002 Co
4	Uncategorized	Company GHI	21234567	31234567	003@abc.com	Mr. 003	003 Co
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8. ITEM LIST

On the main screen of EasyBilling, you can access the Item List by clicking on the [Item List] icon located on the left-hand side.



The Item List serves as a repository for storing all item or product information. When preparing a document, you have the option to load item information directly from the Item List.

The Tool Bar in the Item List provides several useful functions, including:

New: Add a new item to the list.

Edit: Modify the details of the selected item.

Delete: Remove the selected item from the list.

Import: Import items from an XLS file.

Export: Export the entire item list into PDF, XLS, or HTML format.

Category List: Manage supplier categories for better organization and classification.

Within the Item List, items are displayed in a table format, providing a clear overview of their information. You may sort the table by clicking on the header of each column, allowing for easy organization of customer data. Additionally, a search box is available in the upper right corner, enabling you to quickly locate specific items by entering relevant search terms.

8.1. Create Item

The screenshot shows a window titled "Item" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Category : (dropdown arrow)
- Supplier : (dropdown arrow)
- ID :
- Description :
- Spec :
- Dimensions : Length : Width : Height :
- Net Weight :
- Gross Weight :
- Unit :
- Cost :
- Price :
- Discount % :
- Additional Info 1 :
- Additional Info 2 :
- Additional Info 3 :
- Taxable : Yes No
- Photo :
-

At the bottom of the form are two buttons: (with a green checkmark icon) and (with a red X icon).

When adding a new item in EasyBilling, you have the flexibility to input various details, including the item's ID, description, dimensions, and weight. Additionally, you can choose to assign a single price or establish volume pricing for different quantities.

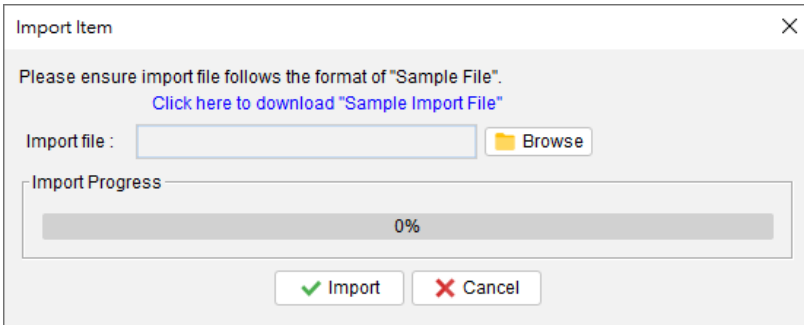
To accommodate specific requirements or additional information, EasyBilling provides three extra fields where you can input their own custom data that may not fit into the standard fields provided.

Moreover, you have the option to include a photo for each item. The photo can be added into the line item of the document.

8.2. Import Item

EasyBilling offers the capability to import items from an Excel file, providing a convenient method for bulk importing item information.

To successfully import items, the Excel file must adhere to a specific format. A sample import file can be easily downloaded by clicking on the provided link within the import dialog box.

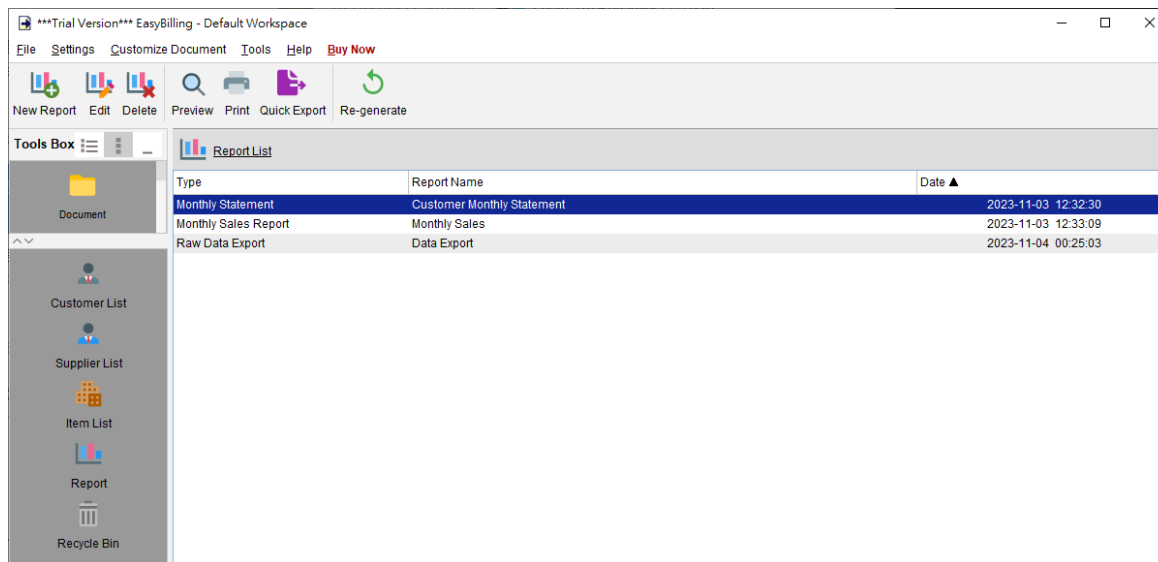


In the import file, the first row serves as the header row, defining the column names. The order of the columns is fixed and should be followed accordingly. Item information should be inputted row by row, starting from the second row of the file. If a particular column is not applicable for a specific item, the corresponding cell can be left empty.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Category	Supplier	ID	Description	Size	Length	Width	Height	Net We	Gross V	Unit	Cost
2	Uncatego	ABC Cor	1	Product 001	S	3	4	5	0.6	1.2	KG	
3	Uncatego	ABC Cor	2	Product 002	M	6	7	8	1.7	2.3	LOT	
4	Uncatego	DEF Cor	3	Product 003	L	8	9	10	2.8	3.4	PCS	
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9. REPORT

On the main screen of EasyBilling, you can access the Report section by clicking on the [Report] icon located on the left-hand side.



At the top of the Report screen, you will find the Tool Bar, which offers a range of functionalities to manage reports efficiently. The icons available in the Tool Bar include:

New - Create a new report. EasyBilling provides 15 pre-designed report templates including:

- | | |
|----------------------------|--------------------------------|
| Global Sales Report | Customer Purchase History |
| Monthly Sales Report | Item Sales Report |
| Sales Report by Customer | Sales Person Report |
| Global Payment Report | Total Tax Payable Report |
| Monthly Payment Report | Supplier Report |
| Payment Report by Customer | Monthly Statement for Supplier |
| Monthly Statement | Raw Data Export |
| Payment Received Report | |

Edit - Modify the selected report.

Delete - Remove the selected report.

Preview - View a preview of the selected report in PDF format.

Print - Print out the selected report.

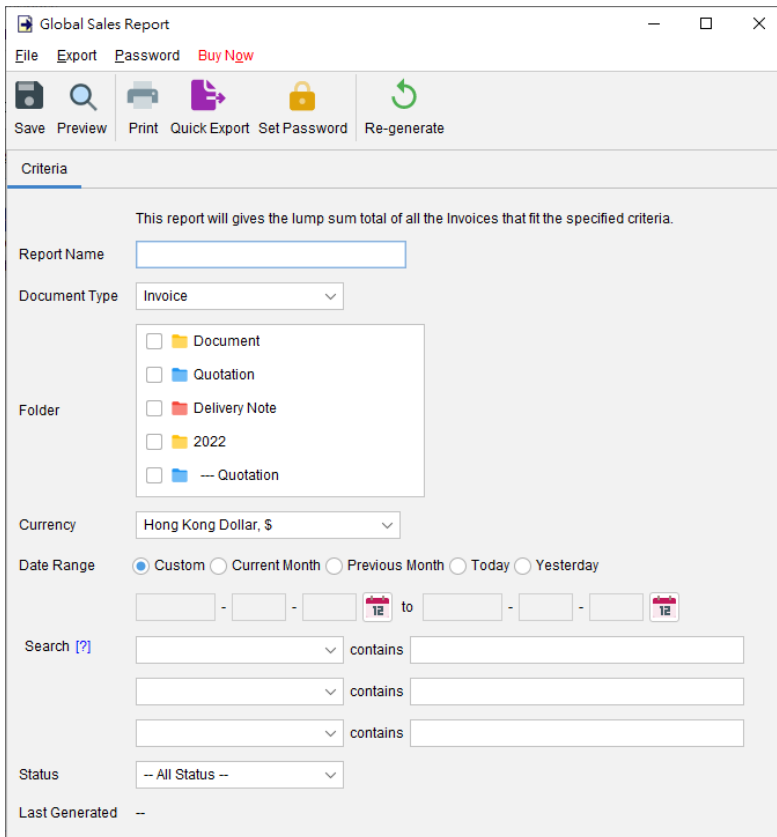
Quick Export - Export the selected report to a specific location and format based on the Quick Export settings configured by the user.

Re-generate - Collect the latest data from documents and re-process the report.

The saved reports will be displayed in a table format for easy reference and access.

9.1. Global Sales Report

Global Sales Report provides an overview of sales performance metrics. It aggregates data from invoice or tax invoice and provides: Number of invoices issued, Total sales amount, Total deposits received, Total balance due.



The screenshot shows the 'Global Sales Report' application window. The title bar includes 'Global Sales Report' and standard window controls. The menu bar contains 'File', 'Export', 'Password', and 'Buy Ngw'. The toolbar has icons for 'Save', 'Preview', 'Print', 'Quick Export', 'Set Password', and 'Re-generate'. Below the toolbar is a 'Criteria' section with a sub-header: 'This report will give the lump sum total of all the Invoices that fit the specified criteria.' The form includes the following fields and options:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to 'Invoice'.
- Folder:** A list box with checkboxes for 'Document', 'Quotation', 'Delivery Note', '2022', and '-- Quotation'.
- Currency:** A dropdown menu set to 'Hong Kong Dollar, \$'.
- Date Range:** Radio buttons for 'Custom', 'Current Month', 'Previous Month', 'Today', and 'Yesterday'. Below are two date pickers with '12' on the calendar icons.
- Search [?]:** Three rows, each with a dropdown menu and a 'contains' label followed by a text input field.
- Status:** A dropdown menu set to '-- All Status --'.
- Last Generated:** A text field showing '--'.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

Below is the sample output of Global Sales Report.

Global Sales Report - Last Month Sales	
<small>(Generated on 2018-01-02 15:32:20)</small>	
Criteria	
Document Type	: Invoice
Folder	:
Currency	: United States Dollar, \$
Date	: 2017-12-01 to 2017-12-31
Status	: All Status
<hr/>	
Result	
Number of Invoices	: 2
Sales Amount	: 4,329.50
Total Deposit	: 630.00
Total Balance Due	: 3,570.00

9.2. Monthly Sales Report

Monthly sales report provides sales information on monthly basis in graphical format. It shows the number of invoices issued and total sales amount by month.

The screenshot shows a window titled "Monthly Sales Report" with a menu bar containing "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main area is titled "Criteria" and contains the following fields:

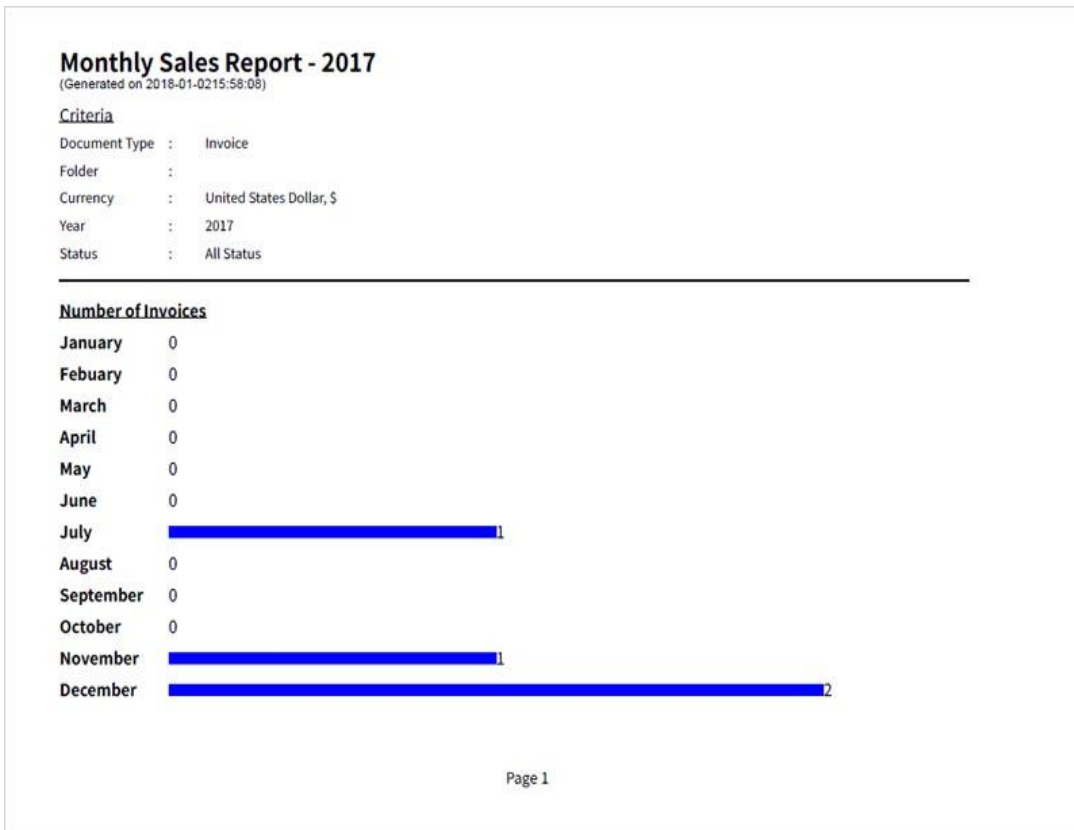
- Report Name:** A text input field.
- Document Type:** A dropdown menu with "Invoice" selected.
- Folder:** A list box with checkboxes and icons for "Document", "Quotation", "Delivery Note", "2022", and "-- Quotation".
- Currency:** A dropdown menu with "Hong Kong Dollar, \$" selected.
- Year:** A dropdown menu with "2023" selected.
- Search [?]:** Three rows, each with a dropdown menu, the word "contains", and a text input field.
- Status:** A dropdown menu with "-- All Status --" selected.
- Last Generated:** A text field with "--" as the value.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices in selected year.

Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

Below is the sample output of Monthly Sales Report.



9.3. Sales Report by Customer

Sales report by Customer gives details sales information on a specify customer, includes number of invoice issued, total sales amount, total deposit and total balance due.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all invoices dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

You have the following options to select the customer:

- All Customers
- Customers not listed in the Customer List
- Customer selected from the Customer List

Search fields are available to filter invoices that meet specified criteria.

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Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Sales Report by Customer is shown below.

Customer Sales Report - 2017 DEC
(Generated on 2018-01-02 16:18:45)

Criteria
Document Type : Invoice
Folder : Document
Currency : United States Dollar, \$
Date : 2017-12-01 to 2017-12-31
Customers : Not listed in Customer List.
Status : All Status

Customer	Number of Invoices	Sales Amount	Total Deposit	Total Balance Due
EVS	1	4,200.00	630.00	3,570.00
Robert Lee	1	129.50	0.00	0.00

Page 1

9.4. Global Payment Report

Global Payment Report provides an overview of payment activities. It aggregates data from Receipt and provides: Number of receipts issued and Amount Received.

The screenshot shows the 'Global Payment Report' application window. The title bar includes 'Global Payment Report' and standard window controls. The menu bar contains 'File', 'Export', 'Password', and 'Buy Now'. The toolbar features icons for 'Save', 'Preview', 'Print', 'Quick Export', 'Set Password', and 'Re-generate'. Below the toolbar is a 'Criteria' section with a sub-header 'Criteria'. A descriptive text states: 'This report will give the lump sum total of all the Receipts that fit the specified criteria.' The form includes a 'Report Name' text input field. The 'Folder' section contains a list of folders with checkboxes: 'Document', 'Quotation', 'Delivery Note', '2022', and '-- Quotation'. The 'Currency' dropdown is set to 'Hong Kong Dollar, \$'. The 'Date Range' section has radio buttons for 'Custom', 'Current Month', 'Previous Month', 'Today', and 'Yesterday'. Below these are two date pickers with 'to' in between. The 'Search' section has three rows, each with a dropdown menu and a 'contains' label followed by a text input field. The 'Status' dropdown is set to '-- All Status --'. The 'Last Generated' field shows '--'.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter receipts that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Global Payment Report is shown below.

Global Payment Report - Last Month Receipt
(Generated on 2018-01-02 15:30:32)

Criteria

Folder	: Document
Currency	: United States Dollar, \$
Date	: 2017-12-01 to 2017-12-31
Status	: All Status

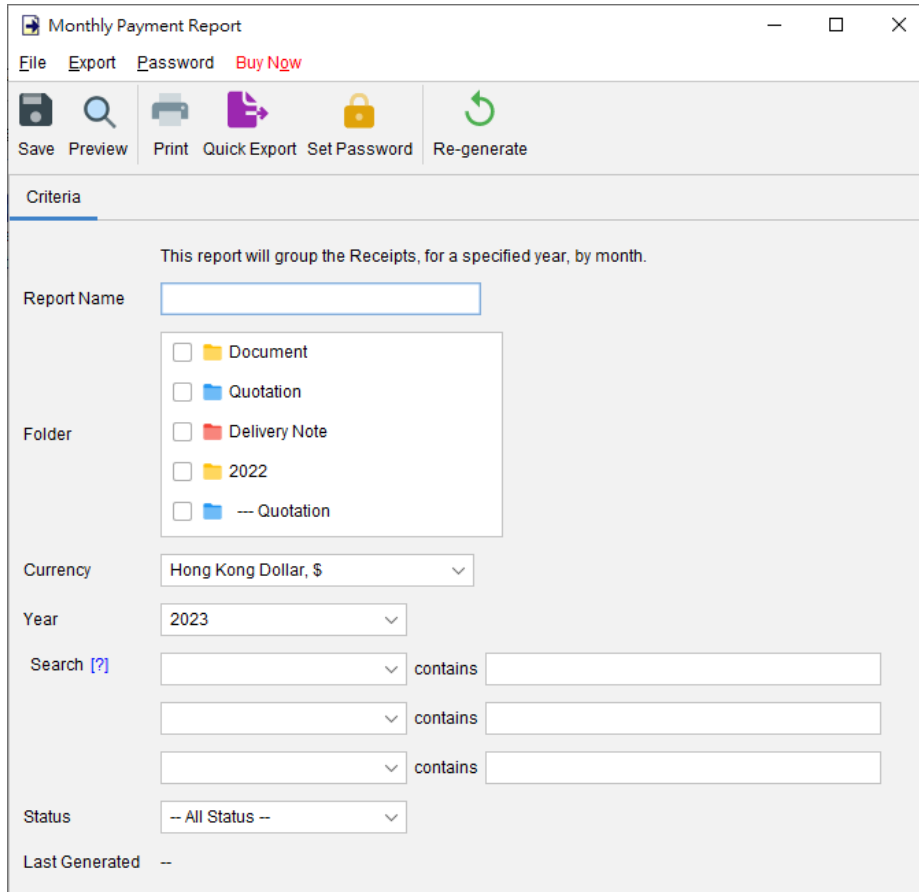
Result

Number of Receipts	: 1
Amount Collected	: 215.00

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9.5. Monthly Payment Report

Monthly Payment Report provides payment information on monthly basis in graphical format. It shows the number of receipts issued and total amount received.



The screenshot shows a web application window titled "Monthly Payment Report". The window has a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main content area is titled "Criteria" and contains the following fields:

- Report Name:** A text input field.
- Folder:** A list of folders with checkboxes: Document, Quotation, Delivery Note, 2022, and --- Quotation.
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Year:** A dropdown menu set to "2023".
- Search [?]:** Three rows, each with a dropdown menu, the word "contains", and a text input field.
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A text field showing "--".

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts in selected year.

Search fields are available to filter receipts that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Monthly Payment Report is shown below.



9.6. Payment Report by Customer

Payment report by Customer gives details payment information on a specify customer, includes number of receipts issued and total amount received.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

You has the following options to select the customer:

- All Customers
- Customers not listed in the Customer List
- Customer selected from the Customer List

Search fields are available to filter receipts that meet specified criteria.

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Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Payment Report by Customer is shown below.

Customer Payment Report - 2017 Dec
(Generated on 2018-01-02 16:19:20)

Criteria
Folder : Document
Currency : United States Dollar, \$
Date : 2017-12-01 to 2017-12-31
Customers : Not listed in Customer List.
Status : All Status

Customer	Number of Receipts	Total	Deposit	Balance Due
Evinco Solutions Limited	1	215.00	100.00	115.00

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9.7. Monthly Statement

This report generates monthly statements for selected customers using invoice or tax invoice data.

The screenshot shows a web application window titled "Monthly Statement". The interface includes a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main area is titled "Criteria" and contains the following fields and options:


- Report Name:** A text input field.
- Document Type:** A dropdown menu set to "Invoice".
- Folder:** A list of folders with checkboxes: "Document", "Quotation", "Delivery Note", "2022", and "-- Quotation".
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Customer:** Radio buttons for "Full List" (selected) and an empty text field, with a "Load from Customer List" button.
- Month:** Radio buttons for "Current Month" (selected) and "Previous Month", followed by a year dropdown (2023) and a month dropdown (11). Below this are "From" and "to" date range selectors (both set to 2000) and a "Consolidated" checkbox.
- Search [?]:** Three rows of dropdown menus followed by "contains" text and input fields.
- Count against:** Radio buttons for "Document Date" (selected) and "Shipping Date".
- Show:** Checkboxes for "Order No.", "Payment Term", "Status", "Deposit", "Balance", "Payment Received", and "Outstanding Balance".
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A text field showing "--".

You must provide a name for the report for easy retrieval later.

The report allows the generation of monthly statements for either the full customer list or an individual customer. The statement can be produced for a specific month or within a chosen time range. The date used for calculations can be the document date or shipping date. Optional fields can also be selected for inclusion in the monthly statement.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

The sample PDF output of Monthly Statement is shown below.



Evinco Solutions Limited
- Provides Innovative Business Software

Unit 2202, Causeway Bay Plaza I
489 Hennessy Road
Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588
Email: info@evinco-software.com
Website: https://www.evinco-software.com

Monthly Statement

Customer
Evinco Solutions Limited
Unit 2202 Causeway Bay Plaza I
489 Hennessy Road
Causeway Bay
Hong Kong

For Month	2017-12	Currency	United States Dollar, \$	
Document Type	Invoice	Status	All Status	

Date	Invoice Number	Total	Deposit	Balance Due
2017-12-08	10001	211.50	--	--
2017-12-15	10000	152.50	--	--
2017-12-26	INV156714	4,200.00	630.00	3,570.00
Total		4,564.00	630.00	3,570.00

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9.8. Payment Received Report

Payment Received Report lists the payment received record made in Invoice or Tax Invoice.

The screenshot shows a web application window titled "Payment Received Report Payment received". The window has a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Set Password", and "Re-generate". The main content area is titled "Criteria" and contains the following fields and options:

- Report Name:** A text input field containing "Payment received".
- Document Type:** A dropdown menu set to "Invoice".
- Folder:** A list of checkboxes with corresponding icons:
 - Document
 - Quotation
 - Delivery Note
 - 2022
 - Quotation
- Currency:** A dropdown menu set to "United States Dollar, \$".
- Customer:** Radio buttons for "Full List" (selected) and an empty field, with a "Load from Customer List" button.
- Month:** Radio buttons for "Current Month", "Previous Month", and a dropdown menu set to "2023" with a sub-dropdown set to "5".
- Search [?]:** Three rows, each with a dropdown menu set to "contains" and an empty text input field.
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A timestamp "2023-11-09 01:12:30".

You must provide a name for the report for easy retrieval later.

The report allows the generation of monthly statements for either the full customer list or an individual customer in a specific month.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

EasyBilling User Guide

Sample output of Payment Received Report is shown below.

evinco
Unit 2202, Causeway Bay Plaza 1
489 Hennessy Road
Causeway Bay, Hong Kong
Tel : +852 31070832 Fax : +852 30208588
info@evinco-software.com
Website : <https://www.evinco-software.com>

Evinco Solutions Limited
- Provides innovative business software

Payment Records

Customer

DODD's Shop

Number **INV10009**

Date	Payment Method	Reference Number	Description	Amount Received
2023-05-13	Cheque			6,400.00

Invoice Total	6,400.00
Deposit	--
Balance	--
Total Payment Received	6,400.00
Outstanding Balance	0.00

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FANCOURT OFFICE PARK, NORTHUMBERLAND AVE AND FELSTEAD RANBURG, 2169
Tel : 097 740 0175 cloudenergygroup@gmail.com

9.9. Customer Purchase History

Customer Purchase History will list the item purchase history of the selected customers. It will list out the document number, quantity, unit price and amount.

The screenshot shows a web application window titled "Customer Purchase History". The window has a menu bar with "File", "Export", "Password", and "Buy Ngw". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main content area is titled "Criteria" and contains the following fields and controls:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Invoice".
- Folder:** A list box with checkboxes and icons for "Document", "Quotation", and "Delivery Note".
- Currency:** A dropdown menu currently set to "Hong Kong Dollar, \$".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below these are two date pickers with calendar icons, separated by "to".
- Customer:** A text input field and a "Load from Customer List" button.
- Item Name:** A large text input field with "Load from Item List" and "Remove Selected" buttons below it.
- Status:** A dropdown menu currently set to "-- All Status --".
- Last Generated:** A text field showing "--".

You must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range for a customer with selected items.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

9.10. Item Sales Report

Item Sales Report shows total amount, quantity and average price of the selected item from Invoices or Tax Invoices.

The screenshot shows a software window titled "Item Sales Report" with a menu bar (File, Export, Password, Buy Now) and a toolbar (Save, Preview, Print, Quick Export, Set Password, Re-generate). The main area is labeled "Criteria" and contains the following fields and controls:

- Report Name:** A text input field.
- Document Type:** A dropdown menu set to "Invoice".
- Folder:** A list box with checkboxes for "Document", "Quotation", and "Delivery Note".
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below are date pickers for start and end dates.
- Item Name:** A large text input field with "Load from Item List" and "Remove Selected" buttons below it.
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A field showing "--".

You must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range for selected items.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

9.11. Sales Person Report

Sales Person Report calculates total amount of invoices of selected sales person from Invoices or Tax Invoices.

You must provide a name for the report for easy retrieval later.

The report retrieve data from Invoice or Tax Invoices within a chosen time range. Search fields are available to filter invoices that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest invoice data, you can click the "Re-generate" button to rerun the analysis.

9.12. Total Tax Payable Report

Total Tax Payable Report shows the tax payable of selected documents that fits the specific requirements.

The screenshot shows a web application window titled "Total Tax Payable Report". The window has a menu bar with "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for "Save", "Preview", "Print", "Quick Export", "Set Password", and "Re-generate". The main content area is titled "Criteria" and contains the following fields:

- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Quotation".
- Folder:** A list of folders with checkboxes: "Document", "Quotation", "Delivery Note", "2022", and "-- Quotation".
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below are date pickers for start and end dates.
- Search [?]:** Three rows of dropdown menus followed by "contains" and text input fields.
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A text field showing "--".

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all selected document dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter documents that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Total Tax Payable Report is shown below.

Total Tax Payable Report - Tax Payable
(Generated on 2018-01-03 00:22:44)

Criteria
Document : Invoice
Folder : Document
Currency : United States Dollar, \$
Date : 2017-12-01 to 2017-12-31
Status : All Status

Result
Number of Documents : 4
Total Tax : 519.54

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9.13. Supplier Report

Supplier report shows the number of purchase order and total amount of the selected suppliers.

The screenshot shows a software window titled "Supplier Report" with a menu bar (File, Export, Password, Buy Now) and a toolbar (Save, Preview, Print, Quick Export, Set Password, Re-generate). The main area is titled "Criteria" and contains the following fields and options:

- Report Name:** A text input field.
- Folder:** A list box with options: Document, Quotation, Delivery Note.
- Currency:** A dropdown menu set to "Hong Kong Dollar, \$".
- Date Range:** Radio buttons for Custom, Current Month, Previous Month, Today, and Yesterday. Below are date pickers for start and end dates.
- Supplier:** Radio buttons for "All Suppliers in Supplier List" (selected), "Not listed in Supplier List", and "Pick from Supplier List". Below is a large empty text area.
- Search:** Three rows of search filters, each with a dropdown menu and a text input field. The first dropdown is set to "contains".
- Status:** A dropdown menu set to "-- All Status --".
- Last Generated:** A text field showing "--".

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all receipts dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

You has the following options to select the supplier:

- All Suppliers
- Suppliers not listed in the Supplier List
- Supplier selected from the Supplier List

Search fields are available to filter purchase orders that meet specified criteria.

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Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Supplier Report is shown below.

Supplier Report - 2018
(Generated on 2018-01-03 00:27:17)

Criteria
Folder :
Currency : United States Dollar, \$
Date : 2018-01-01 to 2018-01-31
Suppliers : Evinco Solutions Limited
Status : All Status

Supplier	Number of Purchase Orders	Total Amount
Evinco Solutions Limited	2	7,238.50

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9.14. Monthly Statement for Supplier

This report generates monthly statement for selected supplier, from Purchase Order.

You may provide a name for the report for easy retrieval later. The report runs against the selected folder, compiling data from all purchase orders dated between specified Start Date and End Date. These date fields can be left blank for no date limitation.

Search fields are available to filter purchase orders that meet specified criteria.

Please note that the report calculations are updated each time it is saved. The "Last Generated" timestamp indicates when it was last processed. To refresh the calculations with the latest receipt data, you can click the "Re-generate" button to rerun the analysis.

The sample output of Monthly Statement for Supplier is given below.

evinco **Evinco Solutions Limited**
- Provides Innovative Business Software
Unit 2202, Causeway Bay Plaza I
409 Hennessy Road
Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588
Email: info@evinco-software.com
Website: https://www.evinco-software.com

**Monthly Statement
for Supplier**

For Month	2018-01
Currency	United States Dollar, \$
Status	All Status

Date	Purchase Order Number (Supplier)	Total
2018-01-03	10000 (Evinco Solutions Limited)	1,781.75
2018-01-03	10001 (Evinco Solutions Limited)	5,456.75
Total		7,238.50

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9.15. Raw Data Export

Raw Data Export allows you to get details information of the document created in EasyBilling. This report can only be exported into Excel format.

The screenshot shows a window titled "Raw Data Export" with a menu bar containing "File", "Export", "Password", and "Buy Now". Below the menu bar is a toolbar with icons for a folder, an Excel file, and a lock, and buttons for "Save", "Export", and "Set Password". The main area is titled "Criteria" and contains the following fields and options:

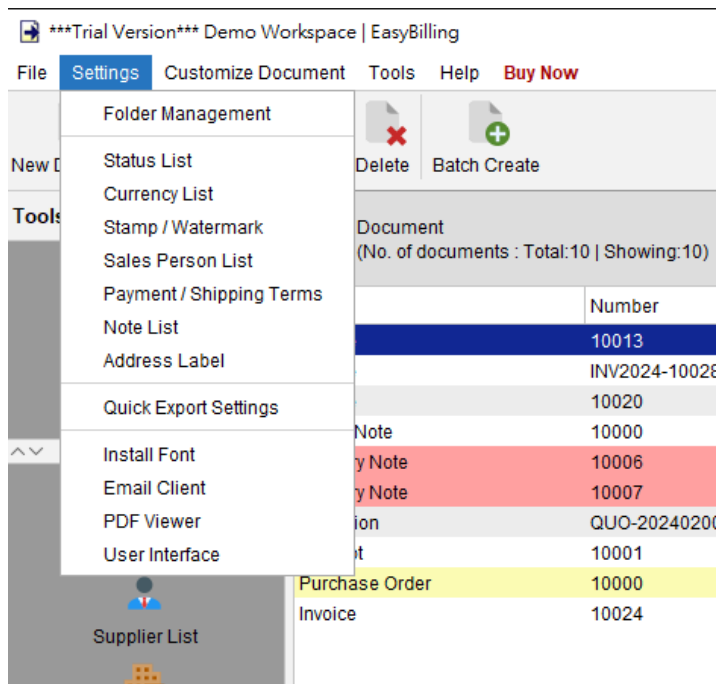
- Report Name:** A text input field.
- Document Type:** A dropdown menu currently set to "Quotation".
- Folder:** A list box with checkboxes for "Document", "Quotation", and "Delivery Note".
- Date Range:** Radio buttons for "Custom", "Current Month", "Previous Month", "Today", and "Yesterday". Below are two date pickers.
- Search [?]:** Three rows, each with a dropdown menu and a "contains" label followed by a text input field.
- Status:** A dropdown menu currently set to "-- All Status --".
- Show Columns:** A grid of checkboxes for various fields:
 - Quote No., Date, Currency, Quote To, Quote To Address, Tel
 - VAT No., Ship To, Ship To Address, VAT No., Sales Rep., Customer Ref. No.
 - Shipping Date, Shipping Term, Payment Term, Custom Field 1, Custom Field 2, Custom Field 3
 - Custom Field 4, Custom Field 5, Custom Field 6, ID, Description, Unit
 - Unit Price, Qty, Total, Sub-Total, Discount, Shipping
 - Total, Tax, Tax 2, Total, Custom Field II 1, Custom Field II 2
 - Notes, Status, Comment
- Buttons for "Select All" and "Clear All" at the bottom.

You need to provide a report name for the report. The report will retrieve all selected documents in the selected folder. Only those documents dated between the "Start Date" and "End Date" will be getting into calculation. You can leave the date field blank if there is no limitation on the period.

Check the box to select the fields of the document and shown in the report.

Note: If any line-item column (in bold and italic) is selected, the document will be spanned as multiple rows according to the number of line items.

10. SETTINGS

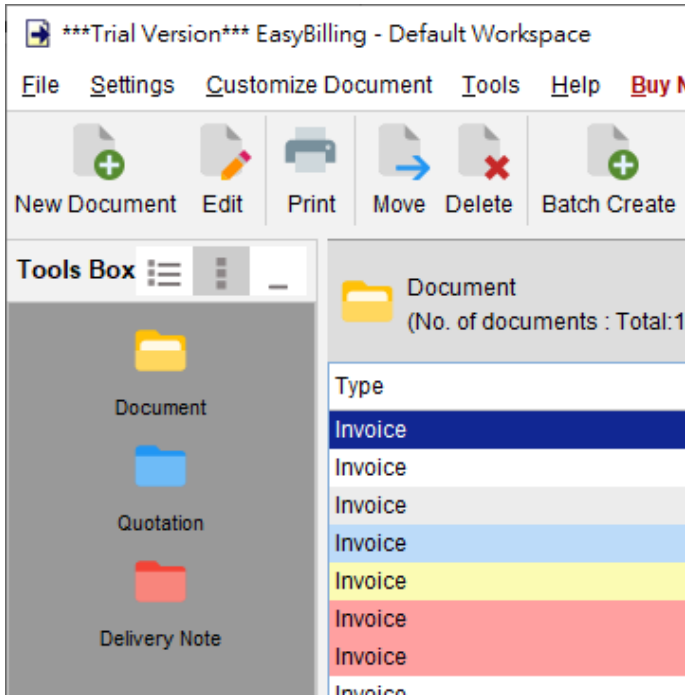


You can configure EasyBilling by adjust different settings easily.

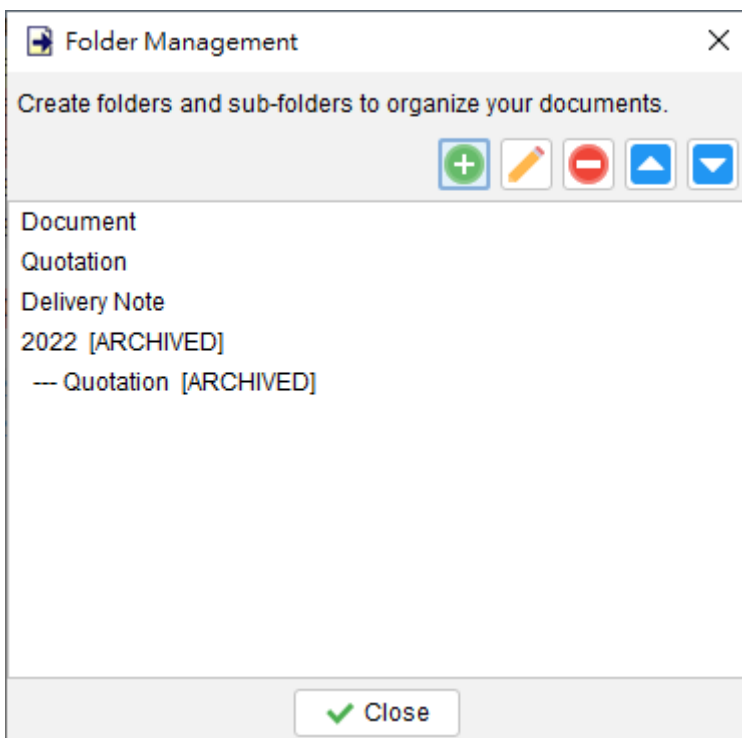
- Folder Management
- Document Status List
- Currency List
- Stamp / Watermark
- Sales Person List
- Payment / Shipping Terms
- Notes List
- Address Label
- Quick Export Settings
- Install Font
- Email Client
- PDF Viewer
- User Interface

10.1. Folder Management

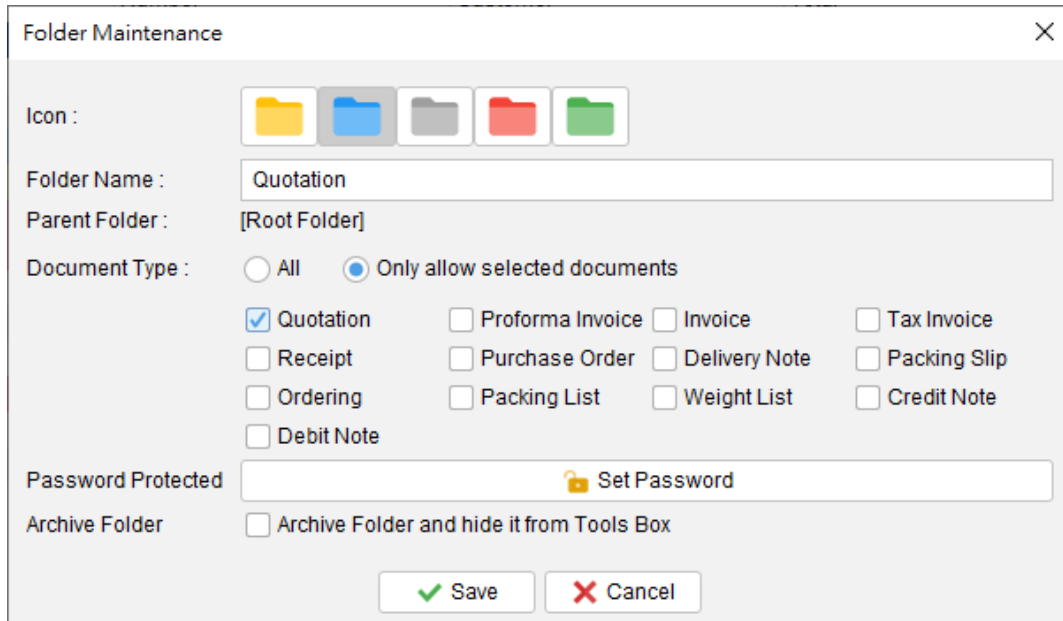
In EasyBilling, a default folder named "Document" is available. You may create additional folders in menu "Settings > Folder Management" to organizing the documents.



To manage the folder list, you can click on the icon to add, edit, or remove folders. You can also use the arrow buttons to adjust the folder's position by moving it up or down to reorder.



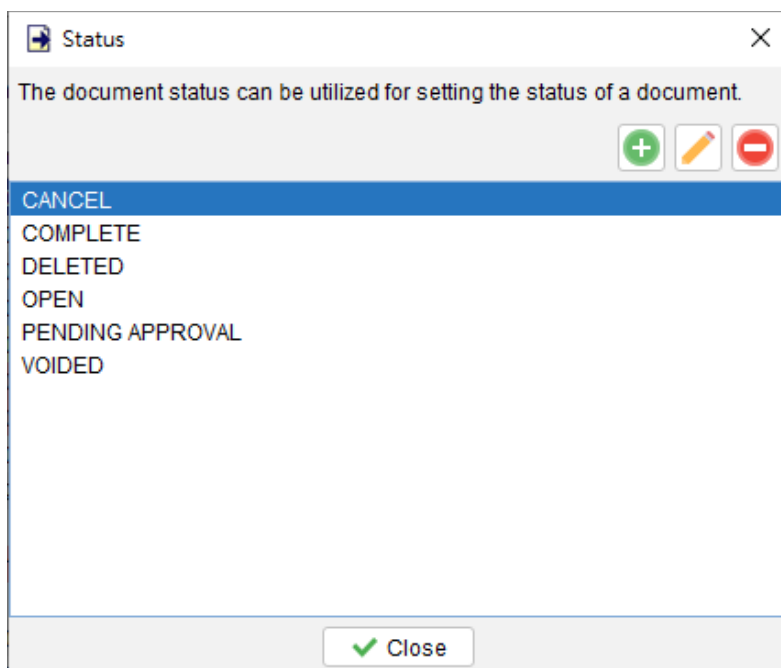
Furthermore, EasyBilling allows to assign different color icons to folders. You can create one level of sub-folders under a parent folder for further organization. Additionally, you have the option to restrict certain types of documents from being stored in the folder.



Folder can also be set with a password to protect from access. If the folder is no longer be used, you may archive the folder and hide it from the Tools Box. These two options are only available in editing folder.

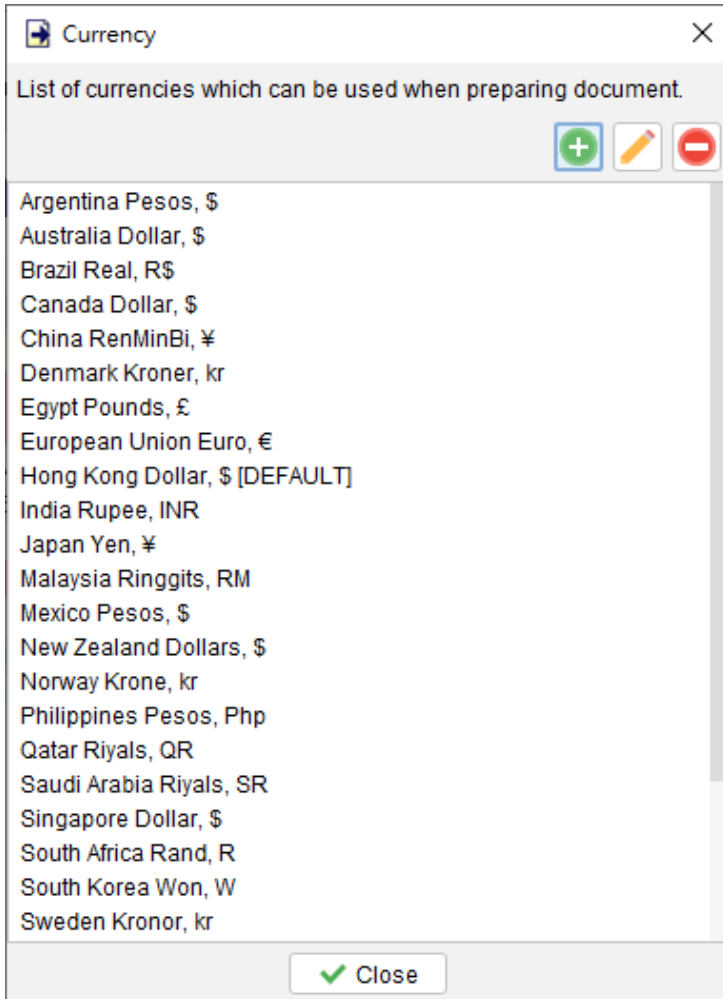
10.2. Document Status List

The document status can be utilized for setting the status of a document. You can click the button to add, edit, or delete a status entry.

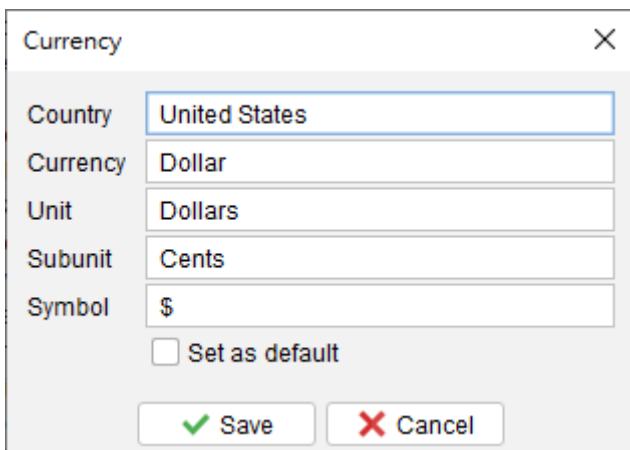


10.3. Currency List

In EasyBilling, it is allowed to assign a currency to a document. You can manage the Currency List in menu "Settings > Currency List".

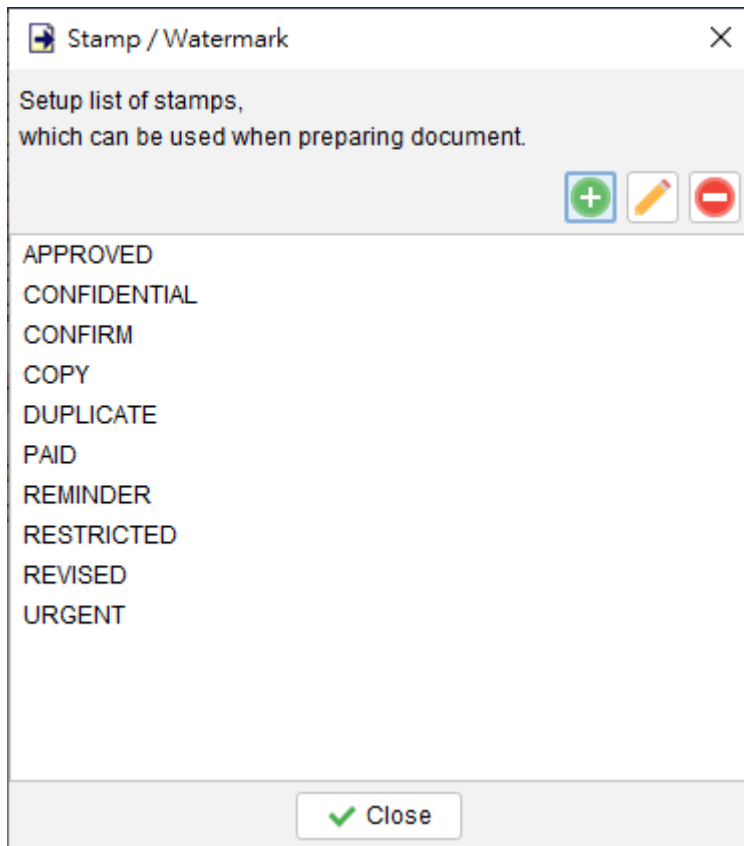


For each currency, you can specify the Unit, Subunit, and Symbol. Additionally, you have the option to designate a default currency.



10.4. Stamp / Watermark

In EasyBilling, document can be added with a red stamp to indicate the important mark. You may also add a greyscale watermark on the document too. You can maintain the list in menu “Settings > Stamp / Watermark”.

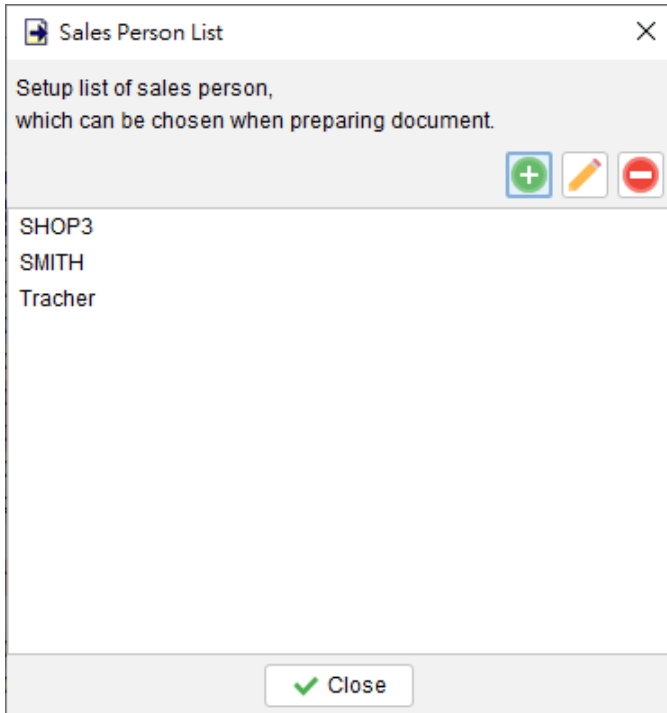


To maintain the list, click the icon at the top-right corner to add, edit and delete. By default, it has

- APPROVED
- CONFIDENTIAL
- CONFIRM
- COPY
- DUPLICATE
- PAID
- REMINDER
- RESTRICTED
- REVISED
- URGENT

10.5. Sales Person List

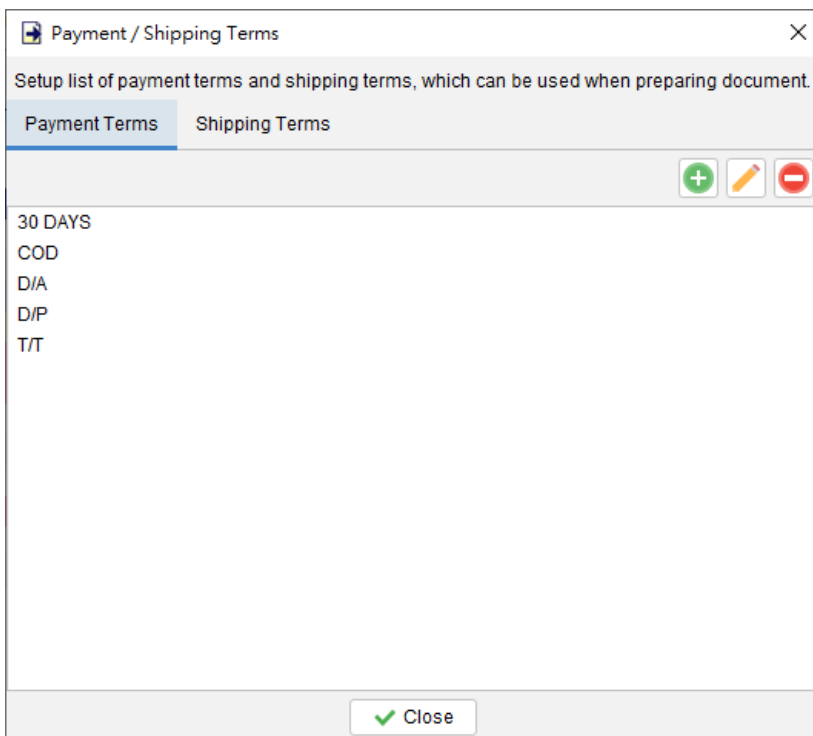
You can maintain your own Sales Person list, which can be selected when preparing document.



10.6. Payment / Shipping Terms

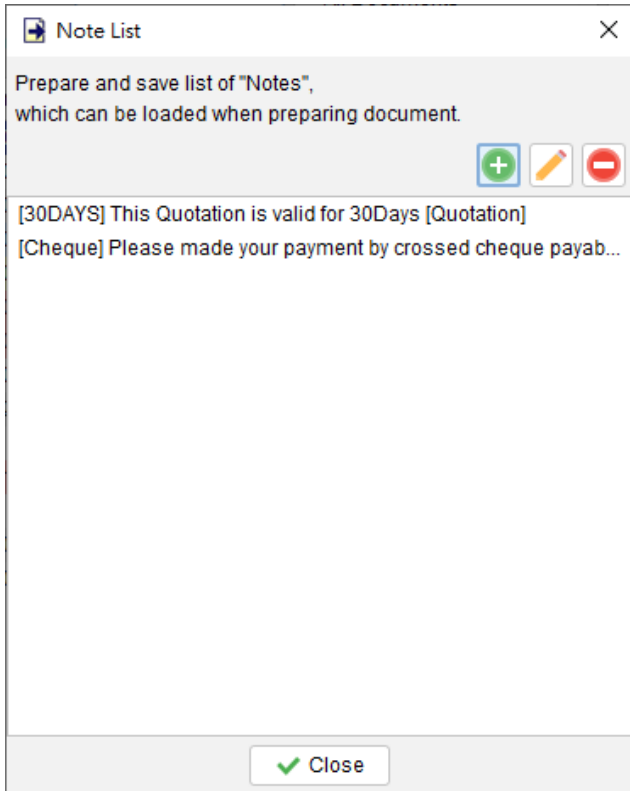
Payment Terms and Shipping Terms are listed here. Click icon at the top-right corner to add, edit or delete.

When preparing document, you can select the terms from the list.

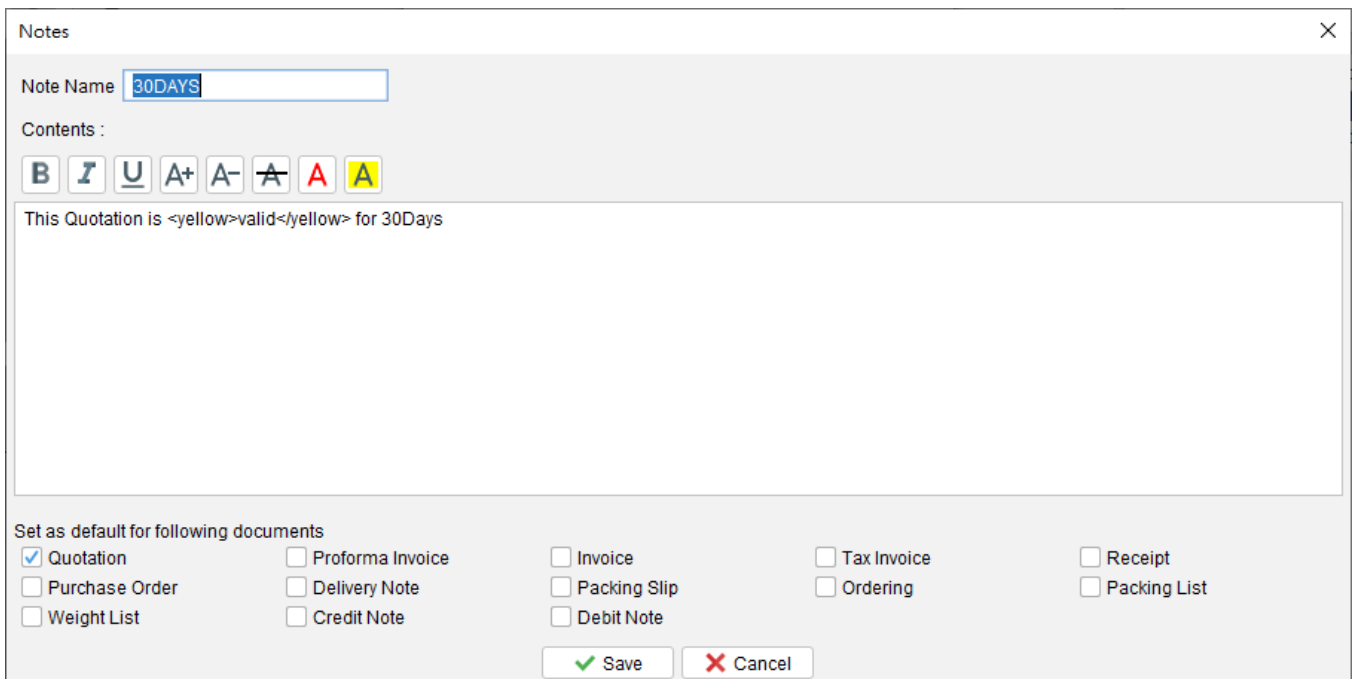


10.7. Note List

When preparing document, you can load the notes directly from this Note List. You can maintain your notes here. Click the icon at the top-right corner to add, edit and delete.

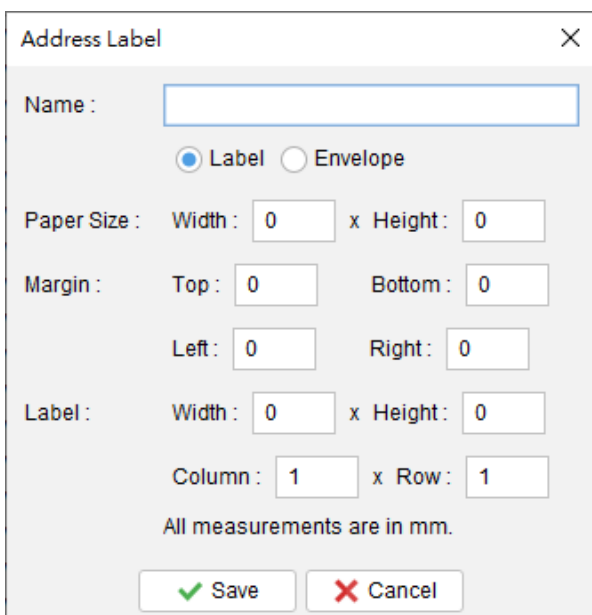
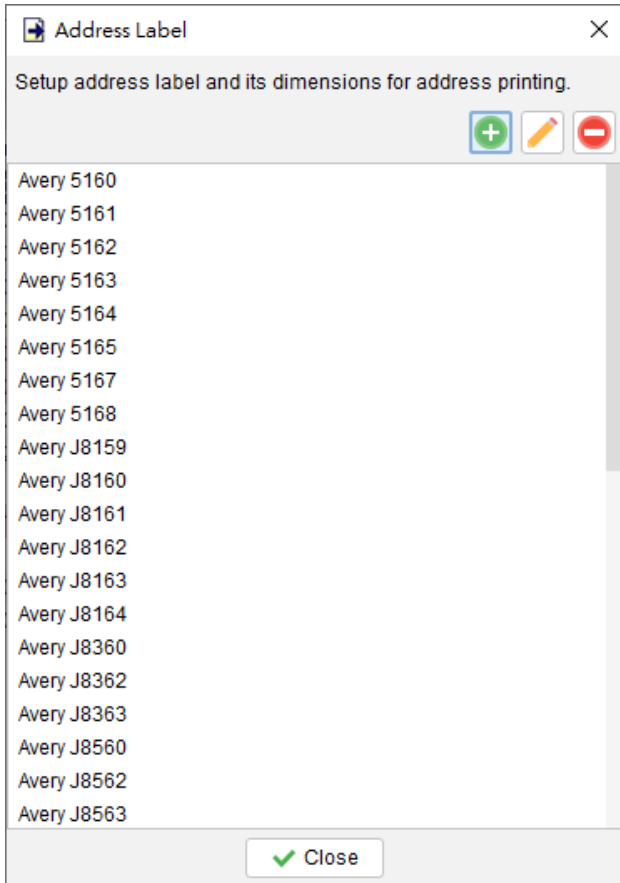


The format of note will be preserved as what you typed in. The note can be set as default for documents.



10.8. Address Label

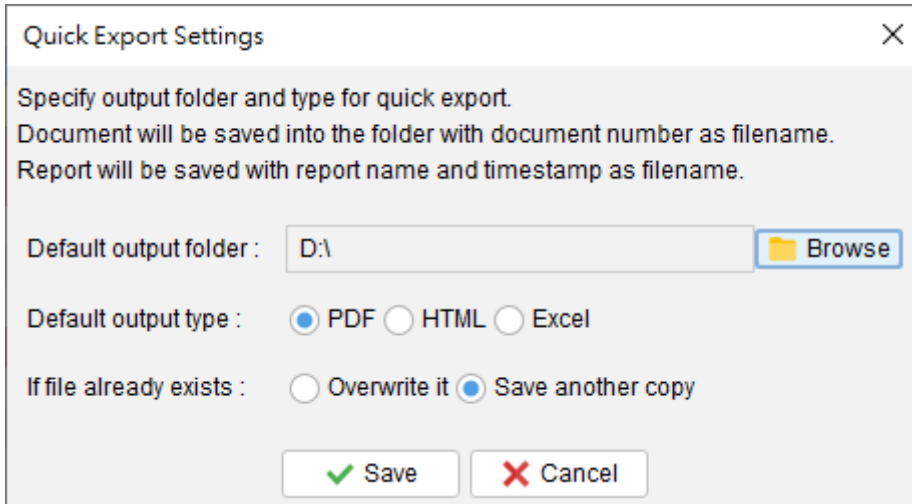
You can create your own Address Label, which can be used in printing customer address. EasyBilling has already built with several common address labels.



10.9. Quick Export Settings

Within the document or report windows, you will find a [Quick Export] button. By clicking on this button, you can effortlessly export the document or report to a designated folder location.

You have the ability to specify the folder location and export type for quick exports. Additionally, you can choose whether to overwrite existing files or save a separate copy if a file with the same name already exists.



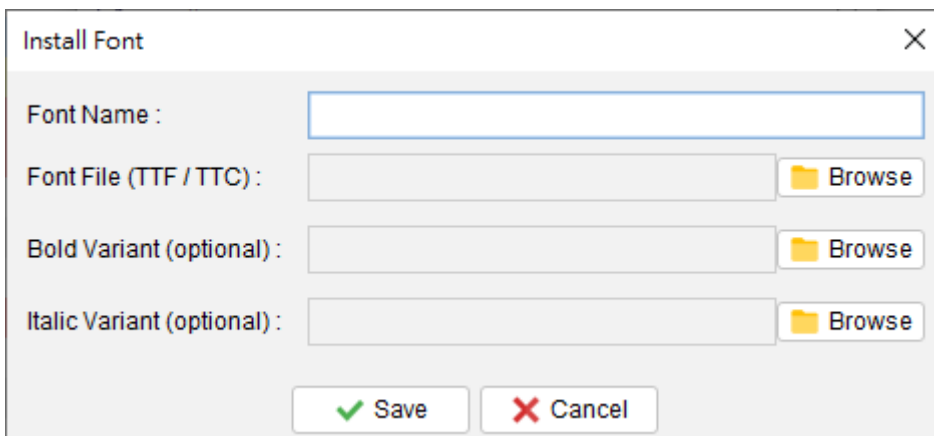
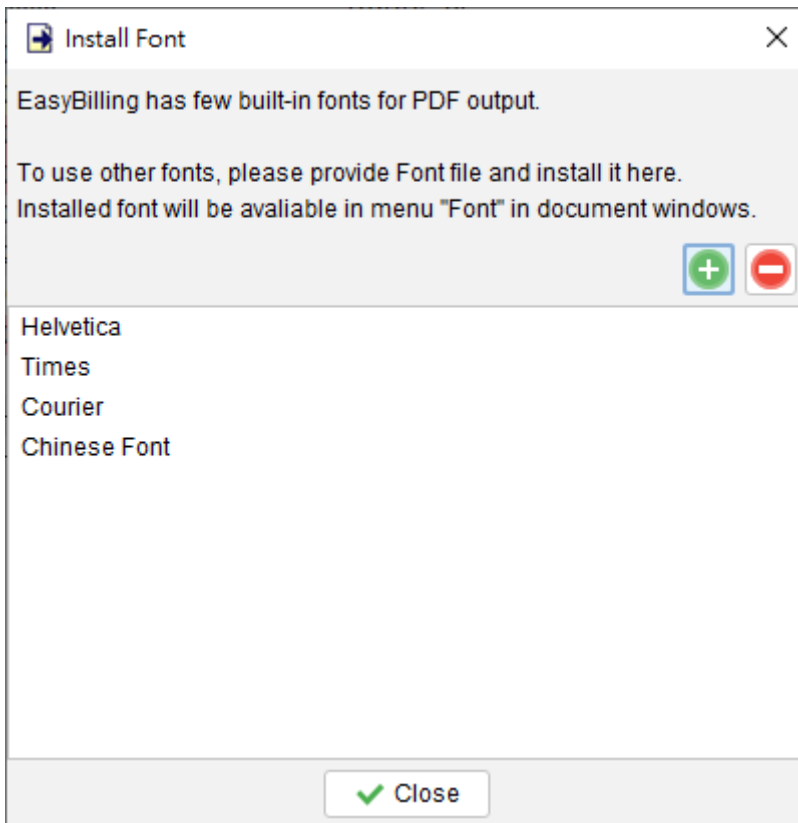
The image shows a dialog box titled "Quick Export Settings" with a close button (X) in the top right corner. The dialog contains the following text and controls:

- Instructional text: "Specify output folder and type for quick export. Document will be saved into the folder with document number as filename. Report will be saved with report name and timestamp as filename."
- Field for "Default output folder": A text box containing "D:\\" and a "Browse" button with a folder icon.
- Field for "Default output type": Three radio buttons labeled "PDF", "HTML", and "Excel". The "PDF" radio button is selected.
- Field for "If file already exists": Two radio buttons labeled "Overwrite it" and "Save another copy". The "Save another copy" radio button is selected.
- Buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

10.10. Install Font

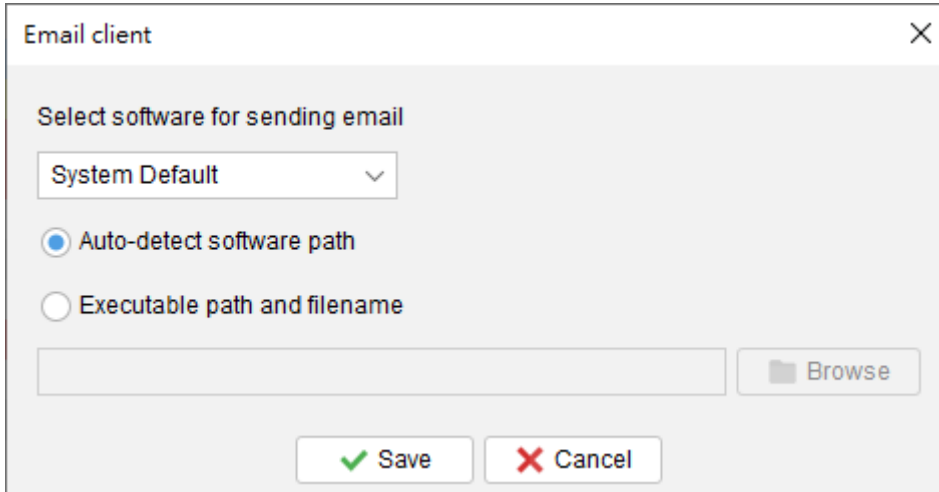
In addition to the four pre-installed fonts, EasyBilling allows you to install your own fonts. The software supports both TTC (TrueType Collection) and TTF (TrueType Font) formats.

Once you have installed a new font, it will become accessible within EasyBilling. You can easily select and apply the font of your choice from the font options available in the menu bar of the document windows.



10.11. Email Client

EasyBilling utilizes the system's default email client to send emails. You have the option to specify a preferred email client for sending emails. It's important to note that certain email software may have varying security measures in place, which could restrict the ability to open email composer windows with attachments.



Email client

Select software for sending email

System Default

Auto-detect software path

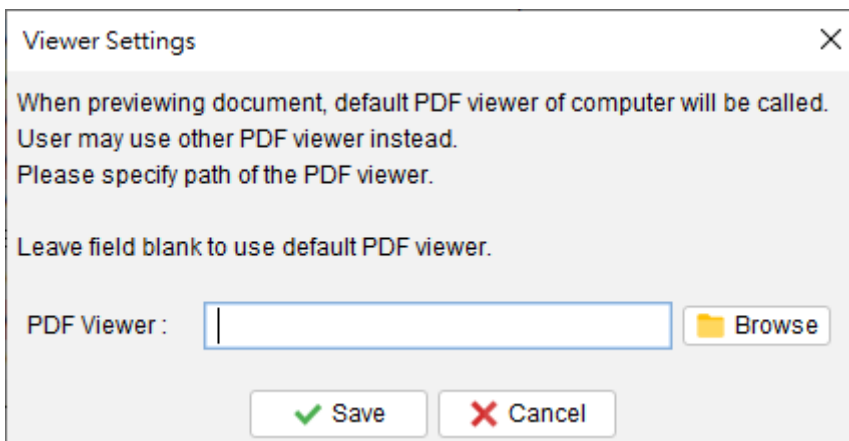
Executable path and filename

Browse

Save Cancel

10.12. PDF Viewer

When previewing a document in EasyBilling, the software will utilize the system's default PDF viewer. However, you also have the option to specify your preferred PDF viewer program for the preview.



Viewer Settings

When previewing document, default PDF viewer of computer will be called.
User may use other PDF viewer instead.
Please specify path of the PDF viewer.
Leave field blank to use default PDF viewer.

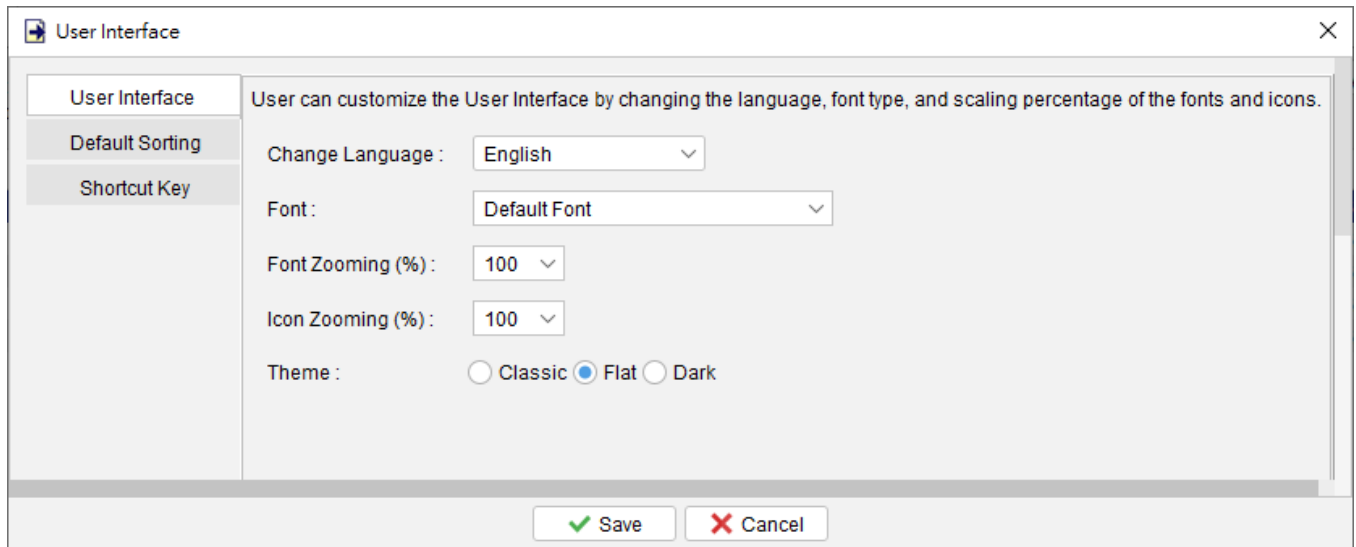
PDF Viewer : Browse

Save Cancel

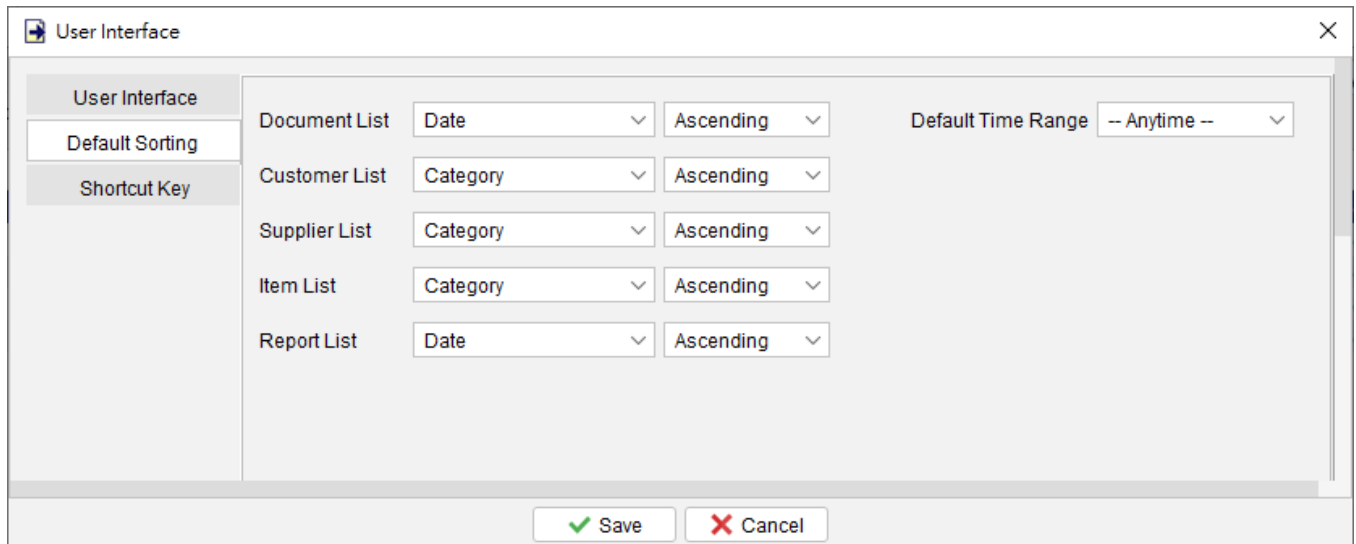
10.13. User Interface

EasyBilling offers you the flexibility to customize their user interface by changing the language, font and adjusting the zooming scale for both the font and icons. By default, these settings are set to Auto (100%), but you can increase the scale to make the font and icons larger, such as selecting 125, 150, or 200 as the preferred scale.

Furthermore, EasyBilling provides three types of themes for the user interface: Classic, Flat, and Dark themes. You can choose the theme that best suits their visual preferences or working environment.

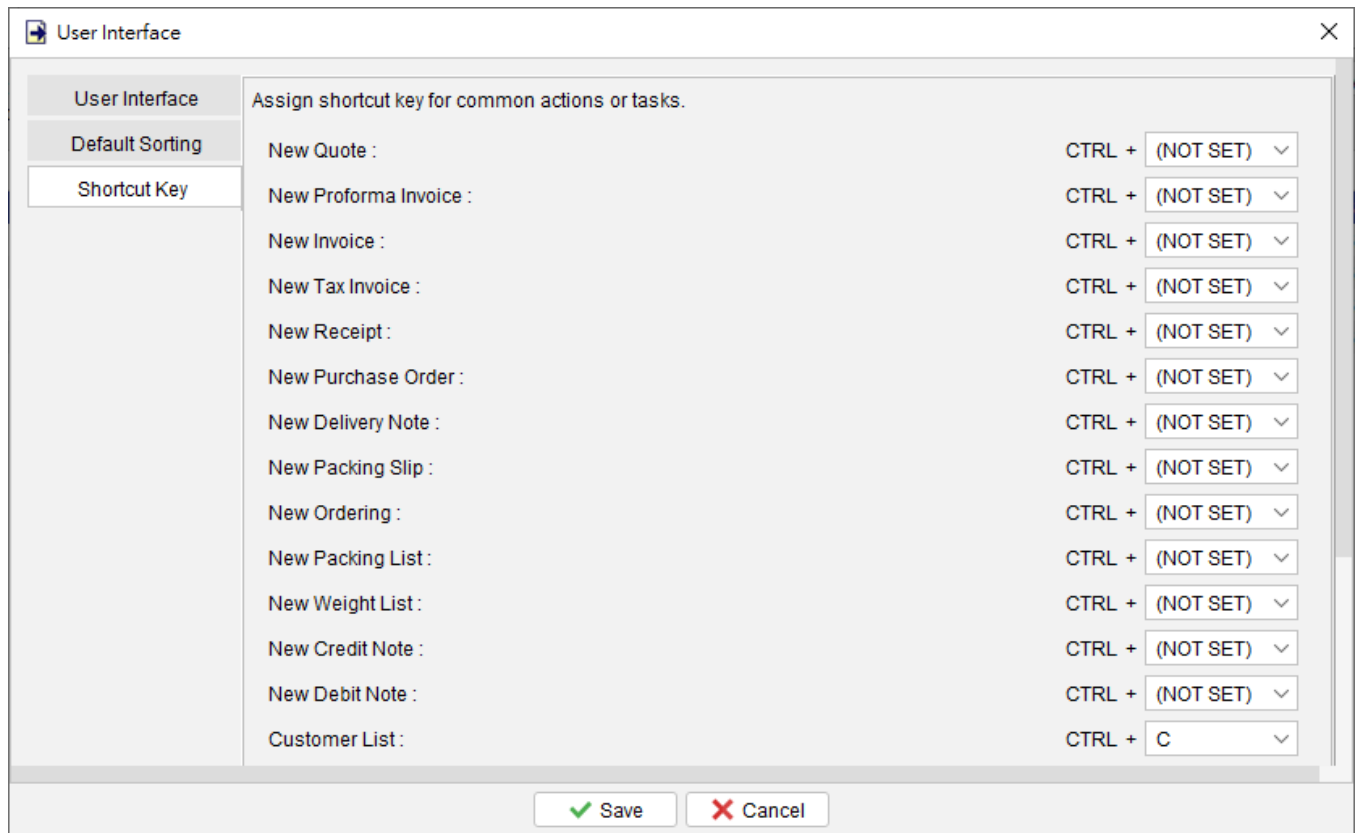


Additionally, you have the option to set the default sorting column and order for various lists in EasyBilling. This includes the document list, customer list, supplier list, item list, and report. By customizing these settings, you can prioritize and organize their data based on their specific needs and preferences.



EasyBilling User Guide

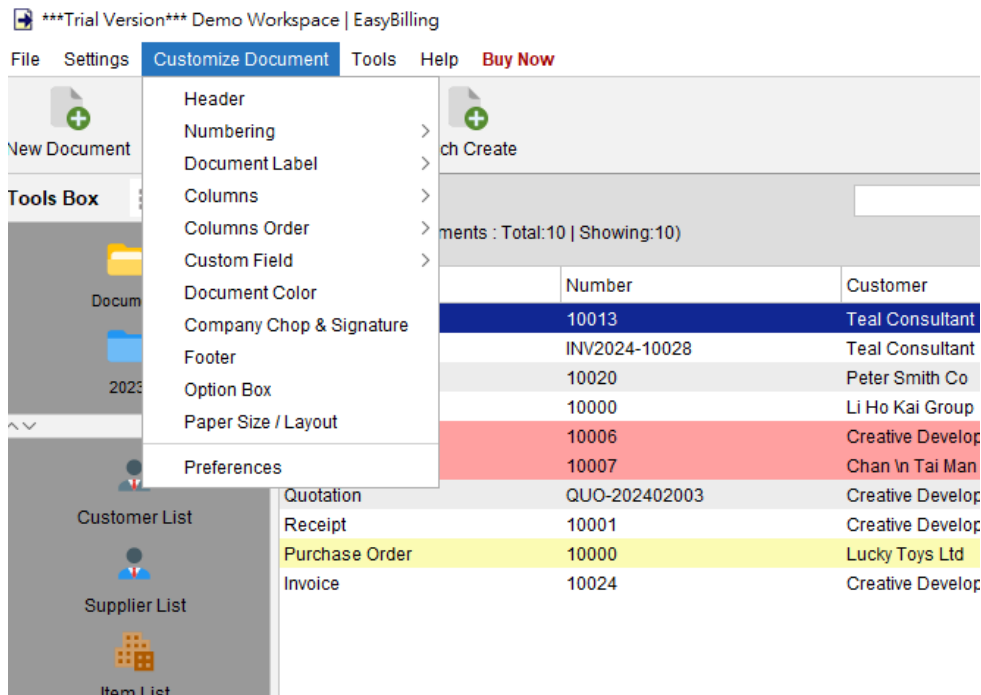
You can personalize their experience by defining custom Shortcut Keys for common tasks. To do this, simply select the desired Character Key that will be associated with the specific task.



The screenshot shows a window titled "User Interface" with a close button (X) in the top right corner. On the left, there is a sidebar with three tabs: "User Interface", "Default Sorting", and "Shortcut Key". The "Shortcut Key" tab is selected. The main area of the window contains the text "Assign shortcut key for common actions or tasks." followed by a list of tasks and their corresponding shortcut keys. Each task is followed by a dropdown menu showing the current shortcut key. At the bottom of the window, there are two buttons: "Save" (with a green checkmark) and "Cancel" (with a red X).

Task	Shortcut Key
New Quote :	CTRL + (NOT SET)
New Proforma Invoice :	CTRL + (NOT SET)
New Invoice :	CTRL + (NOT SET)
New Tax Invoice :	CTRL + (NOT SET)
New Receipt :	CTRL + (NOT SET)
New Purchase Order :	CTRL + (NOT SET)
New Delivery Note :	CTRL + (NOT SET)
New Packing Slip :	CTRL + (NOT SET)
New Ordering :	CTRL + (NOT SET)
New Packing List :	CTRL + (NOT SET)
New Weight List :	CTRL + (NOT SET)
New Credit Note :	CTRL + (NOT SET)
New Debit Note :	CTRL + (NOT SET)
Customer List :	CTRL + C

11. CUSTOMIZE DOCUMENT



In EasyBilling, documents come with pre-defined styles and layouts. However, you have the flexibility to customize the documents according to your specific business requirements.

- Header
- Numbering
- Document Label
- Column
- Column Order
- Custom Field
- Document Color
- Company Chop & Signature
- Footer
- Option Box
- Paper Size / Layout
- Preferences


11.1. Header

Header

* To ensure the image is correctly displayed, please use JPEG image with RGB color mode.

Print header with default layout

Company Information



Remove

Logo Image Size should be in 300x300 pixels

* Leave field empty if not applicable

Company Name : Click to Add Lo...

(Line2) : Remove

Unit 2202, Causeway Bay Plaza 1

489 Hennessy Road

Causeway Bay, Hong Kong

Tel : Fax :

info@evinco-software.com

Website :

VAT No. : Company Reg. No. :

Click to Add Lo...

Remove

Logo Image Size should be in 300x300 pixels

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Refresh

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info@evinco-software.com
Website : https://www.evinco-software.com

Quote No. **SAMPLE-QUO-001**

Quotation

Quote To: Ship To:

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD
ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				
Sub-Total (\$)					59.95
Discount (\$)					9.95
Shipping (\$)					3.00
Total (\$)					53.00
Tax (\$)					10.00
Tax 2 (\$)					11.50
Total (\$)					74.50

Notes
Amounts shown are in US dollars. This is a sample.

For And On Behalf Of For And On Behalf Of [CUSTOMER_NAME]

There are three options available for configuring the header of document in EasyBilling:

- **Print header with default layout:**
This option enables you to print the header using a predefined layout. You can customize the company information in the header and include a logo on either the left or right side. The logo should be in JPG format and have a size of 300x300 pixels or a similar ratio.
- **Print header with an image file:**
With this option, you have the ability to provide a letterhead image that EasyBilling will use as the header during printing. The letterhead image should have dimensions of 1600x300 pixels or a similar ratio.
- **No header print. I will use my letterhead paper:**
If you prefer to print the document on your own letterhead paper, you can choose this option. You will be able to specify the height (in millimeters) for the letterhead.

11.2. Numbering

You have the flexibility to customize the numbering sequence and pattern for the document number according to their company's requirements.

Numbering - Quotation

Define number pattern and starting number for document.
Document number will be generated in sequence automatically.

Quotation

Numbering Pattern :

0 denotes leading zero; # denotes document number
{YYYY} denotes 4-digits current year; {YY} denotes 2-digits current year;
{M} denotes current month {D} denotes current day

Numbering

Current Starting Number :

Number assigned in next document :

New Starting Number :

Regular Reset

Reset starting number

To :

Every Month Year

Show Barcode Format

The pattern can be configured using variables such as year, month, or day. This allows you to incorporate these variables into the document number format as needed.

0 – treat as the leading zero.

- Treat as the current document number

{YYYY} - 4-digits current year

{YY} - 2-digits current year

{M} - Current month

{D} - Current Day

Example 1 Numbering Pattern: INV#

Current Number: 123 => Output: INV123

Current Number: 345678 => Output: INV345678

Example 2 Numbering Pattern: INV0000#

Current Number: 123 => Output: INV00123

Current Number: 345678 => Output: INV345678

Example 3 Numbering Pattern: INV{YYYY}0000#

Current Number: 123 => Output: INV202300123

Current Number: 345678 => Output: INV2023345678

Furthermore, you can choose to reset the numbering either on a monthly or yearly basis, providing them with the option to start a new numbering sequence at the beginning of each month or year, aligning with their company's practices.

11.3. Document Label

You may customize the text labels within the document based on your preferences. You can easily revise the document labels on the left side. As you make changes to the labels, the document preview on the right side will be updated accordingly.

Document Label - Quotation
— □ ×


Rename document label to fit your business needs.

- Use "n" for line break;
- Use [CUSTOMER_NAME] to load customer name

Label	Rename To
Quote No.	Quote No.
Quotation	Quotation
Quote To	Quote To
Billing Address Tel	Tel
Billing Address Vat	VAT No
Ship To	Ship To
Shipping Address Tel	Tel
Shipping Address Vat	VAT No
Date	Date
Customer Ref. No.	Customer Ref. No.
Sales Rep.	Sales Rep.
Shipping Date	Shipping Date
Shipping Term	Shipping Term
Payment Term	Payment Term
ID	ID
Description	Description
Unit	Unit
Unit Price	Unit Price
Qty	Qty
Total	Total
Sub-Total	Sub-Total
Discount	Discount
Shipping	Shipping
Total	Total
Tax	Tax
Tax 2	Tax 2
Overall Total	Total

Note: Non-english characters will be represented as # in Preview window.
It will be shown correctly in PDF output with proper font.

Refresh



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Quote No. **SAMPLE-QUO-001**

Quotation

Quote To

Sample Company
New York, United States
Tel 21234567
VAT No

Ship To

Sample Company
New York, United States
Tel 34567890
VAT No

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Sub-Total (\$)	59.95
Discount (\$)	9.95
Shipping (\$)	3.00
Total (\$)	53.00
Tax (\$)	10.00
Tax 2 (\$)	11.50
Total (\$)	74.50

Notes

Amounts shown are in US dollars.
This is a sample.

For And On Behalf Of

For And On Behalf Of [CUSTOMER_NAME]

✓ Save
✗ Cancel

11.4. Columns

You may customize the table of line items within the document to suit your needs.

You have the option to set the width of each column. If there are any columns that are not needed, you can simply uncheck the corresponding box to remove them from the table.

Document Columns - Quotation
— □ ×

Select columns of item list in document and specify their width.

Show Columns	Width (mm)
<input type="checkbox"/> #	0
<input type="checkbox"/> Photo	0
<input checked="" type="checkbox"/> ID	10
Product Description	112
<input type="checkbox"/> Supplier	0
<input type="checkbox"/> Spec	0
<input type="checkbox"/> Info 1	0
<input type="checkbox"/> Info 2	0
<input type="checkbox"/> Info 3	0
<input checked="" type="checkbox"/> Unit	13
<input checked="" type="checkbox"/> Price	23
<input checked="" type="checkbox"/> Qty	12
<input type="checkbox"/> Discount %	0
<input type="checkbox"/> Taxable	0
<input checked="" type="checkbox"/> Total	20
<input type="checkbox"/> Tax %	0
<input type="checkbox"/> Tax Amount	0
<input type="checkbox"/> Total (inc Tax)	0

To rearrange columns order, visit menu "Customize Document > Document Columns Order"

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Your company name, logo and other infos
Set in menu "Customize Document > Header"

Quote No. **SAMPLE-QUO-001**

Quotation

To	Shipping Address
Sample Company New York, United States Tel 21234567 VAT No	Sample Company New York, United States Tel 34567890 VAT No

Date	06-05-2021	Sales Rep.	Peter Smith	Customer Name.	EVS12345
Shipping with in	06-05-2021	Shipping Through	COURIER	Payment Term	COD

ID	Product Description	Unit	Price (\$)	Qty	Total (\$)
001	Sample Product #001 - Feature A - Feature B	PCS	39.95	1	39.95
002	Sample Product #002 - Feature C	PCS	10.00	2	20.00

Amount in Words Seventy Four Dollar and Fifty Cents Only	Sub-Total (\$) 59.95
	Discount (\$) 9.95
	Shipping (\$) 3.00
	Total (\$) 53.00
	SGST (6.00%) 10.00
	CGST (6.00%) 11.50
	Rounding Adjustment (\$) 0.00
	Total (\$) 74.50

Notes
Amounts shown are in US dollars.
This is a sample.

Accepted For S-WORLD TECHNOLOGIES

Authorized Signature(s) Authorized Signature(s)

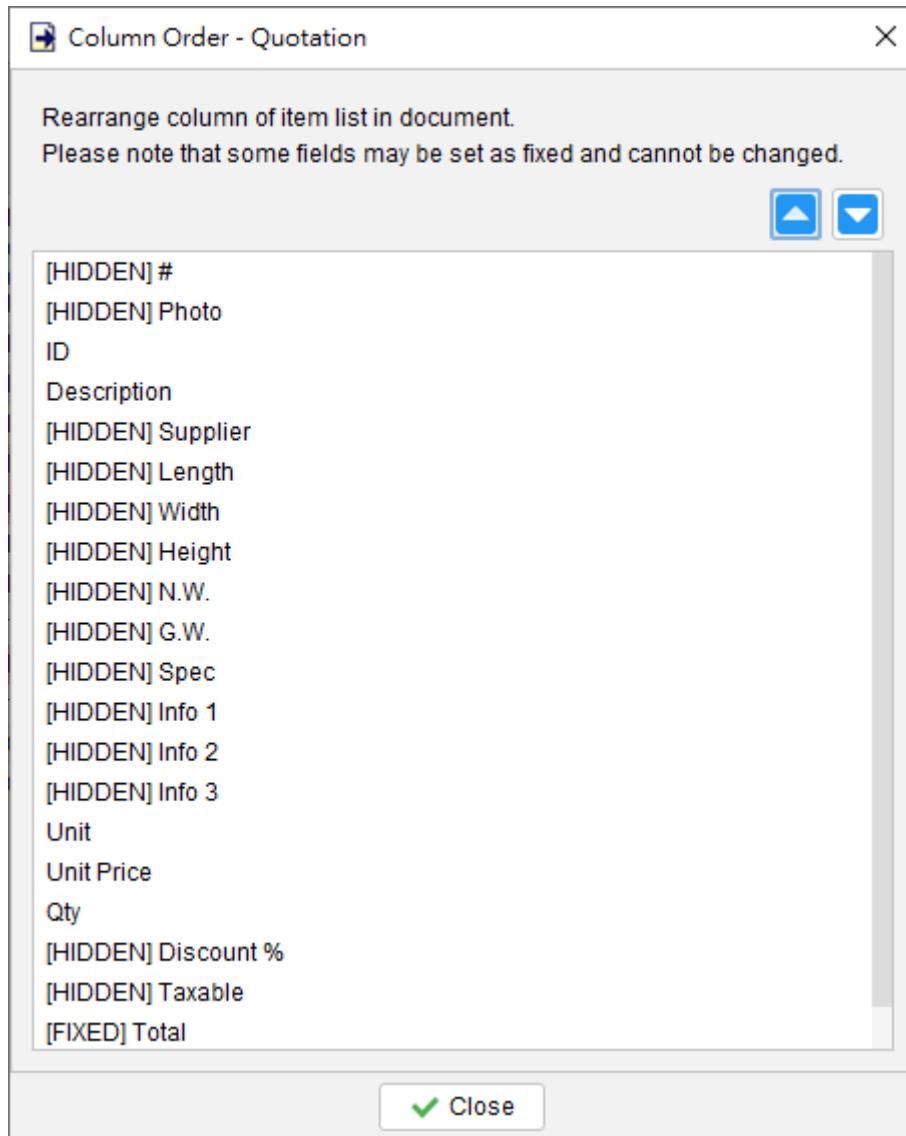
Save
 Cancel

Page 139

11.5. Columns Order

You have the option to rearrange the columns of the line items in the document.

To rearrange the order, simply click and highlight the column name, and then use the arrow button to move it to the desired position. This allows you to easily customize the sequence of columns.



11.6. Custom Field

You may add additional fields in the document. EasyBilling provides two sets of custom fields for you to utilize. One set can be added above the Line Item table, while the other set can be added above the notes field in the document.

When adding a custom field, you can specify its name, type (Text, Integer Number, Decimal Number, or Date), and width. The width can be set as 1/3, 2/3, or 3/3 of the line, allowing you to control the size and placement of the field within the document.

Please note that any changes made to the custom fields will only be applied to newly created documents and will not affect existing ones.

Custom Field - Quotation
— □ ×

User can create additional fields in document.
Notes: Changes only apply to new documents.

Section I: Below Date fields
- allow six custom fields
- specify field name, type and size below

1. Text 3/3
Default Value Today Blank
2. Text 1/3
Default Value Today Blank
3. Text 1/3
Default Value Today Blank
4. Text 1/3
Default Value Today Blank
5. Text 1/3
Default Value Today Blank
6. Text 1/3
Default Value Today Blank

Section II: Above Notes field
- allow two custom fields

1.
Default Value
2.
Default Value

Note: Non-english characters will be represented as # in Preview window.
It will be shown correctly in PDF output with proper font.

Refresh

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Quote No. SAMPLE-QUO-001

Quotation

Quote To		Ship To	
Sample Company New York, United States Tel 21224587 VAT No		Sample Company New York, United States Tel 34567890 VAT No	
Date	2023-11-10	Sales Rep.	Peter Smith
Shipping Date	2023-11-10	Shipping Term	COURIER
Remarks		Customer Ref. No.	EVS12345
		Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)	
001	Sample Product #001	PCS	39.95	1	39.95	
	- Feature A					
	- Feature B					
002	Sample Product #002	PCS	10.00	2	20.00	
	- Feature C					
					Sub-Total (\$)	59.95
					Discount (\$)	9.95
					Shipping (\$)	3.00
					Total (\$)	53.00
					Tax (\$)	10.00
					Tax 2 (\$)	11.50
					Total (\$)	74.50

Terms & Conditions
Testing Message:

Notes
Amounts shown are in US dollars.
This is a sample.

✔ Save
✘ Cancel

11.7. Document Color

You may modify the color of various sections within the document, such as the Header, Document Number, Border, Shadow, and Footer. By clicking the corresponding button, you can select the desired color for each part of the document.

Simply click on the document name to switch between different types of documents and adjust their colors. Additionally, if you wish to apply the same color to all types of documents, you can check the box located at the top.

For modern and table layout, you have the option to adjust the alignment of the document title too.

To change color on different parts of document, click on Color button to choose.

Use same look & feel for all documents

Quotation	Header Color	
Proforma Invoice	Document Number Color	
Invoice	Document Line Color	Align Left Align Center Align Right
Tax Invoice	Stamp Color	Square Round
Receipt	Border Color	Disable Enable
Purchase Order	Shadow Color	Disable Enable
Delivery Note	Label Color	NORMAL BOLD
Packing Slip	Label Color on Shadow	NORMAL BOLD
Ordering	Entry Color	NORMAL BOLD
Packing List	Alternate Row Color in Item List	Disable Enable
Weight List	Line Color in Item List	Disable Enable
Credit Note	Footer Color	
Debit Note		

Save Cancel

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Website : evinco-software.com

APPROVED Quote No. **SAMPLE-QUO-001**

Quotation

Quote To: Sample Company, New York, United States, Tel 21234567, VAT No
Ship To: Sample Company, New York, United States, Tel 34567890, VAT No

Date	30-12-2024	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	30-12-2024	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Sub-Total (\$)	59.95
Discount (\$)	9.95
Shipping (\$)	3.00
Total (\$)	53.00
Tax (16.50%)	10.00
Tax 2 (\$)	11.50
Total (\$)	74.50

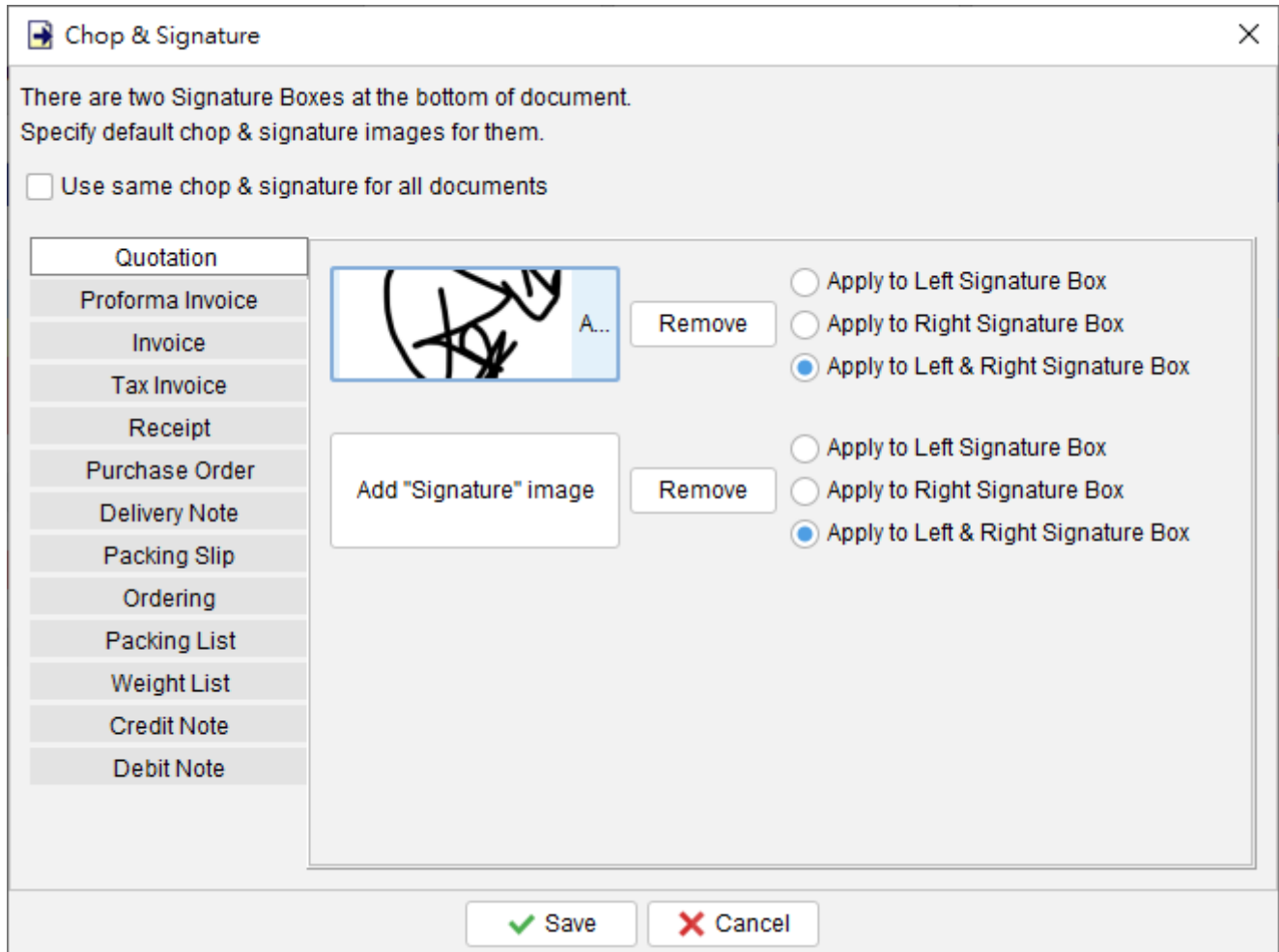
Amounts shown are in US dollars.
This is a sample.

11.8. Company Chop & Signature

EasyBilling provides two signature boxes located at the bottom of the document. You have the option to define the default company chop and signature image for these signature boxes.

To load your company chop and signature image, simply click the designated button. You can specify whether the image should be applied to the left box, right box, or both. The image should have dimensions of 300x300 pixels.

By clicking on the document name, you can switch between different types of documents and set the company chop and signature image accordingly. If you wish to use the same chop and signature for all types of documents, you can check the box located at the top.



11.9. Footer

You may customize the footer for different documents in EasyBilling. The footer consists of two lines.

The first line of the footer is divided into three parts: left, center, and right. You can choose to display the Page Number, Date, Document Number, or input your own custom text in each respective part. The second line of the footer allows you to specify the company's contact information.

Additionally, you can use an image as the footer. The image should be in JPG format and have dimensions of 1600x120 pixels or a similar ratio.

To set the footer for a specific document, click on the document name and make the necessary adjustments. If you wish to use the same footer for all types of documents, you can check the box located at the top.

Document footer can be set with default layout or an image file.

In default layout, there are three parts in document footer: left, center and right. It can be set with a Page Number, Date, Document Number or your own text. Contact information can also be added to the footer.

Use same footer for all documents

Print footer with default layout
 Print footer with image file

Left: Date
 Center: Page No. (Page #)
 Right: Page No. (Page #)

Copy information from Header

Unit 2202, Causeway Bay Plaza 1
489 Hennessy Road
Causeway Bay, Hong Kong

Tel: +852 31070832
Fax: +852 30209588
info@evinco-software.com
Website: https://www.evinco-software.com

Click to Add Image Remove Footer Image Size should be 1600x120 pixels

Save Cancel

Refresh

Note: Non-english characters will be represented as # in Preview window. It will be shown correctly in PDF output with proper font.

Quotation

Quote To: Sample Company, New York, United States, Tel: 21234567, VAT No:
Ship To: Sample Company, New York, United States, Tel: 34567890, VAT No:

Date	2023-11-10	Sales Rep.	Peter Smith	Customer Ref. No.	EVS12345
Shipping Date	2023-11-10	Shipping Term	COURIER	Payment Term	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001	PCS	39.95	1	39.95
	- Feature A				
	- Feature B				
002	Sample Product #002	PCS	10.00	2	20.00
	- Feature C				

Sub-Total (\$) 59.95
Discount (\$) 9.95
Shipping (\$) 3.00
Total (\$) 53.00
Tax (\$) 10.00
Tax 2 (\$) 11.50
Total (\$) 74.50

Notes: Amounts shown are in US dollars. This is a sample.

For And On Behalf Of:
Authorized Signature(s):

Page 1
2023-11-10
Unit 2202, Causeway Bay Plaza 1, 489 Hennessy Road, Causeway Bay, Hong Kong
Tel: +852 31070832 Fax: +852 30209588 info@evinco-software.com Website: https://www.evinco-software.com

11.10. Option Box

In EasyBilling documents, various checkboxes are available to indicate whether specific fields should be shown or hidden in the output document.

You have the option to specify the default values for these checkboxes when creating a new document. This allows you to predefine whether certain fields should be shown or hidden by default in newly created documents.

To set the default values of these option boxes for different document types, simply click on the document name and adjust the checkboxes accordingly. This enables you to customize the default visibility of specific fields based on your preferences for each document type.

Option Box

Set default value of option boxes in each type of document.

Document Type	When new [Document Type] is created...
Quotation	<input type="checkbox"/> Set "Hide empty fields in output" box checked
Proforma Invoice	<input type="checkbox"/> Set "Tel" box in Billing Address checked
Invoice	<input type="checkbox"/> Set "Vat No" box in Billing Address checked
Tax Invoice	<input type="checkbox"/> Set "Tel" box in Shipping Address checked
Receipt	<input type="checkbox"/> Set "Vat No" box in Shipping Address checked
Purchase Order	<input checked="" type="checkbox"/> Set "Sub Total" box checked
Delivery Note	<input type="checkbox"/> Set "Discount" box checked
Packing Slip	<input type="checkbox"/> Set "Shipping" box checked
Ordering	<input type="checkbox"/> Set "Total" box checked
Packing List	<input type="checkbox"/> Set "Tax 1" box checked
Weight List	<input type="checkbox"/> Set "Tax 2" box checked
Credit Note	<input type="checkbox"/> Set "Total" box checked
Debit Note	<input checked="" type="checkbox"/> Set "Note" box checked
	<input checked="" type="checkbox"/> Set "Signature" box on the Left checked
	<input checked="" type="checkbox"/> Set "Signature Date" box on the Left checked
	<input type="checkbox"/> Set "Signature" box on the right checked
	<input type="checkbox"/> Set "Signature Date" box on the right checked

Save Cancel

11.11. Paper Size / Layout

EasyBilling offers four paper sizes to choose from: A4, A5 (Landscape or Portrait), Letter, and Legal. You have the option to specify the paper size for your documents.

In addition to selecting the paper size, you can also choose between three types of document layouts: Modern, Basic, and Table. These layout options provide different design styles for your documents, allowing you to customize the overall appearance based on your preferences and requirements.

Select paper size and layout for the document

Use same paper and layout for all documents

Quotation
 Proforma Invoice
 Invoice
 Tax Invoice
 Receipt
 Purchase Order
 Delivery Note
 Packing Slip
 Ordering
 Packing List
 Weight List
 Credit Note
 Debit Note

Paper Size: A4 (210mm x 297mm)

Layout: Modern Basic Table

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Quotation

Quote To	Ship To	Date
Sample Company New York, United States Tel 21234567 VAT No	Sample Company New York, United States Tel 34567890 VAT No	2023-11-10 Quote No. SAMPLE-QUO-001

APPROVED

Sales Rep.	Customer Ref. No.	Shipping Date	Shipping Term	Payment Term
Peter Smith	EVS12345	2023-11-10	COURIER	COD

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)
001	Sample Product #001 - Feature A - Feature B	PCS	39.95	1	39.95
002	Sample Product #002 - Feature C	PCS	10.00	2	20.00

Sub-Total (\$)	59.95
Discount (\$)	9.95
Shipping (\$)	3.00
Total (\$)	53.00
Tax (\$)	10.00
Tax 2 (\$)	11.50
Total (\$)	74.50

Notes
 Amounts shown are in US dollars.
 This is a sample.

For And On Behalf Of _____ For And On Behalf Of [CUSTOMER_NAME]

Save Cancel

11.12. Preferences

Document Name	Settings	On	Off
Rename Document on User Interface	<input checked="" type="checkbox"/>	On	Off
Turn off document and hide it from user interface, if it is not necessary.	<input type="checkbox"/>	On	Off
* The changes will be effective on next software startup.			
Quotation	<input type="text"/>	On	Off
Proforma Invoice	<input type="text"/>	On	Off
Invoice	<input type="text"/>	On	Off
Tax Invoice	<input type="text"/>	On	Off
Receipt	<input type="text"/>	On	Off
Purchase Order	<input type="text"/>	On	Off
Delivery Note	<input type="text"/>	On	Off
Packing Slip	<input type="text"/>	On	Off
Ordering	<input type="text"/>	On	Off
Packing List	<input type="text"/>	On	Off
Weight List	<input type="text"/>	On	Off
Credit Note	<input type="text"/>	On	Off
Debit Note	<input type="text"/>	On	Off

In the Document Preferences section, you can specify various settings for your documents. These settings include:

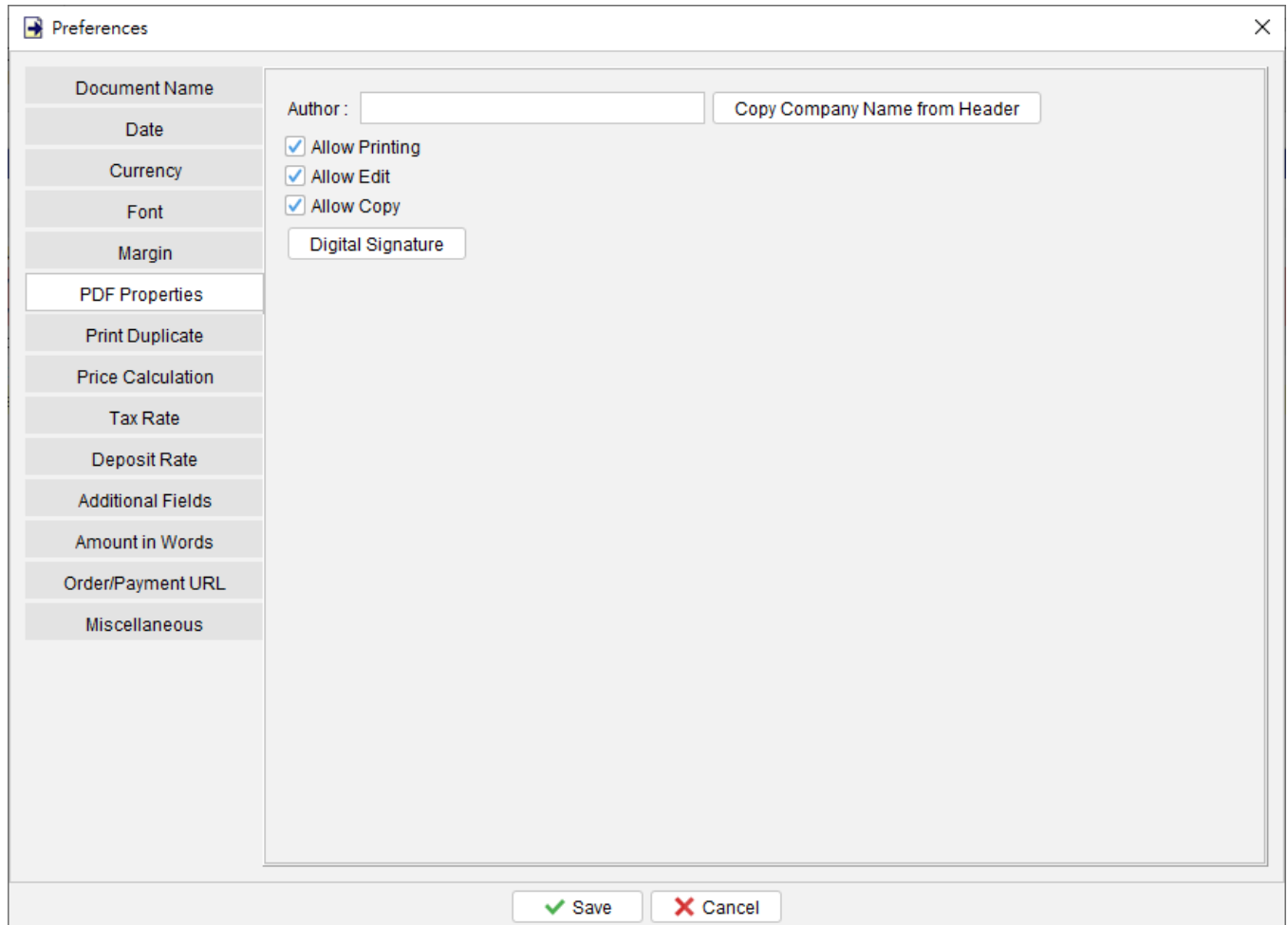
- **Document Name:** You may rename documents displayed in the user interface, allowing for personalized and easily identifiable document names.
- **Date:** Set the default date for new documents as either Today's date or leave it empty. Set the desired format for dates and choose a date separator that suits your preference.
- **Currency:** Specify the default currency to be used in EasyBilling and define the number of decimal places for the subunit, if applicable.
- **Font:** Choose the default font type, font size, and writing mode for your documents.
- **Margin:** Set the page margin and address margin for your documents.
- **PDF Properties:** Specify permissions for the PDF output, such as allowing or restricting printing, editing, and copying. You can also set a digital signature for the PDF file.

- **Print Duplicate:** Show the "Print Duplicate/Triplicate" button in the document window and set the label for Duplicate/Triplicate copies.
- **Price Calculation:** By default, EasyBilling calculates the total amount of line items based on quantity. You have the option to set the price calculation by different measurements, such as length or weight.
- **Tax Rate:** Set the default tax rate and its calculation. You can also specify whether the shipping, packaging, and insurance fields are taxable.
- **Deposit Rate:** Set the default deposit rate for Proforma Invoice, Invoice, and Tax Invoice.
- **Additional Field:** Choose to include an Insurance, Packaging, Rounding Adjustment field in the selected document.
- **Amounts in Words:** Choose to include an Amount in Words field in the selected document.
- **Order/Payment URL:** Choose to include an Order/Payment URL field in the selected document.
- **Miscellaneous:** Set the default quantity of line items, enable or disable multi-line input in the description column of line items, include an extra blank line in line items, and set the minimum height of the note field.

These preferences allow you to customize various aspects of your documents to align with your specific needs and preferences.

11.12.1. PDF Properties

In EasyBilling, you have the ability to adjust the settings of the PDF output for your documents to include options such as Allow Printing, Allow Edit, and Allow Copy. These settings are designed to provide protection and control over the usage of your document.



By enabling the Allow Printing option, recipients of the PDF document will be able to print a physical copy of the document if needed.

The Allow Edit option allows you to make modifications to the content and layout of the PDF document using appropriate editing software.

Enabling the Allow Copy option permits you to copy and extract text or other content from the PDF document for their own use or reference.

Digital Signature

A Digital Signature ensures the integrity of a PDF document by guaranteeing that its contents have not been altered since the document was signed.

In EasyBilling, you have the option to add a Digital Signature to the PDF output of your documents. To do so, you will need to provide your Digital Certificate in PFX format and specify a Timestamp Server URL. The Digital timestamp includes the time of the signature as proof of the document's integrity. You can either provide a Timestamp Server URL from a trusted and independent authority or leave it blank to use the timestamp from the local computer.

Furthermore, you have the ability to configure the visibility of the Digital Signature on the document. You can set the location of the Signature Boxes at the bottom of the document or choose other preferred locations as desired.

Digital Signature

Digital Signature guarantees the contents of PDF document have not been modified once signed. Please provide your digital certificate (PFX) for digital signing.

Digital timestamp marks a PDF signature with the time as proof of integrity. Please provide timestamp server url from an independent, trusted authority, or leave it blank and use timestamp from this computer.

Digital Certificate (PFX) :

Save Password : Show Password

Timestamp Server (TSA) URL :

Visible Digital Signature

Show visible Digital Signature image

Signer Name :

Signer Location :

Signature Image :

Signature Position :

Below is the sample output. The visible digital signature is set on the Signature Box.



Evinco Solutions Limited
- Provides innovative business software
Unit 2202, Causeway Bay Plaza 1
489 Hennessy Road
Causeway Bay, Hong Kong
Tel : +852 31070832 Fax : +852 30209588
info@evinco-software.com
Website : <https://www.evinco-software.com>

Quote No. QUO-202311-10002

Quotation

Quote To

Ship To

Date	2023-11-16	Sales Rep.		Customer Ref. No.	
Shipping Date		Shipping Term		Payment Term	

ID	Description	Unit	Unit Price (\$)	Qty	Total (\$)

Notes

This Quotation is valid for 30Days

For And On Behalf Of



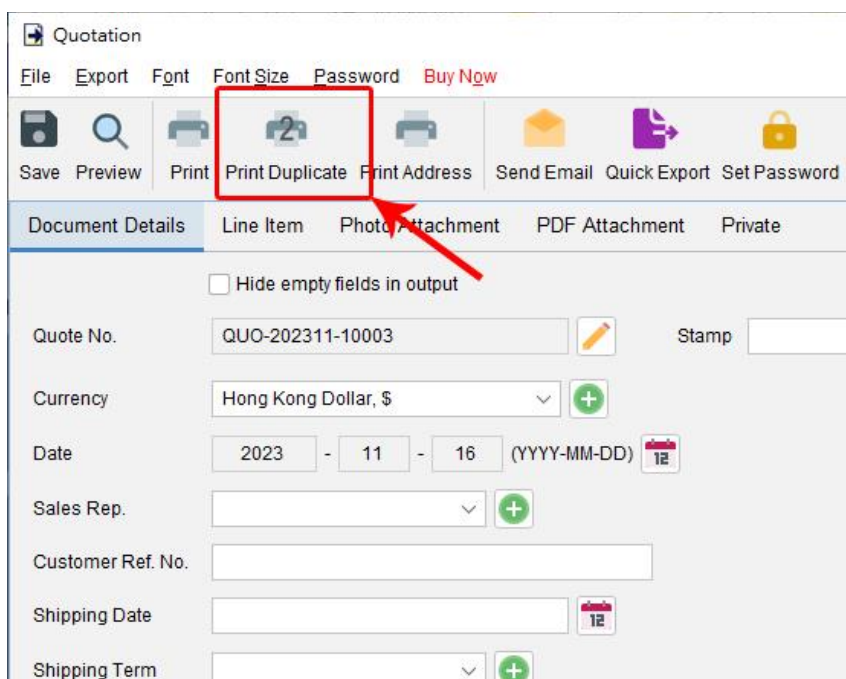
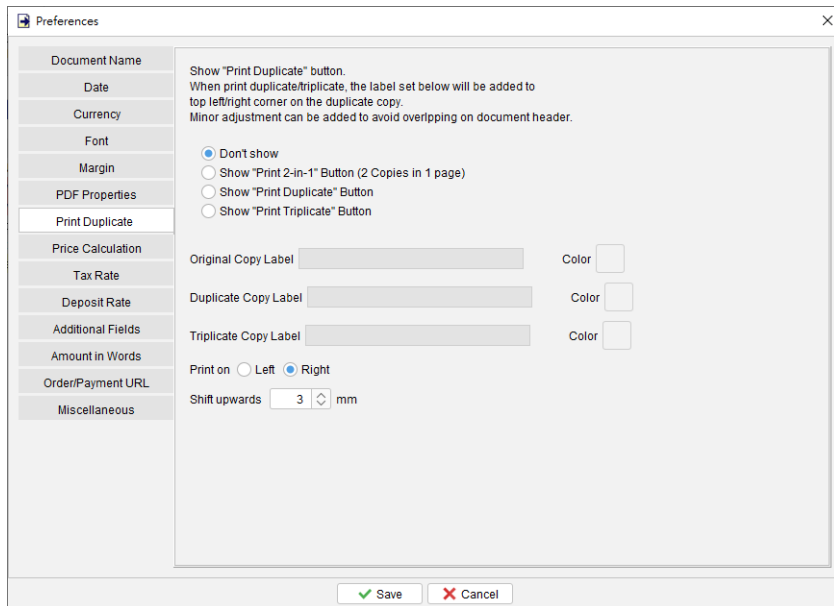
Digitally signed by:
Evinco
Location:
Hong Kong
Date:
2023-11-16 18:22

Authorized Signature(s)

11.12.2. Print Duplicate

EasyBilling offers the convenient feature of printing duplicate or triplicate copies of your documents. Within the Preferences settings, you have the option to enable the Print Duplicate or Triplicate button. Once activated, an additional print button will be added to the document window, allowing you to easily select the desired number of copies.

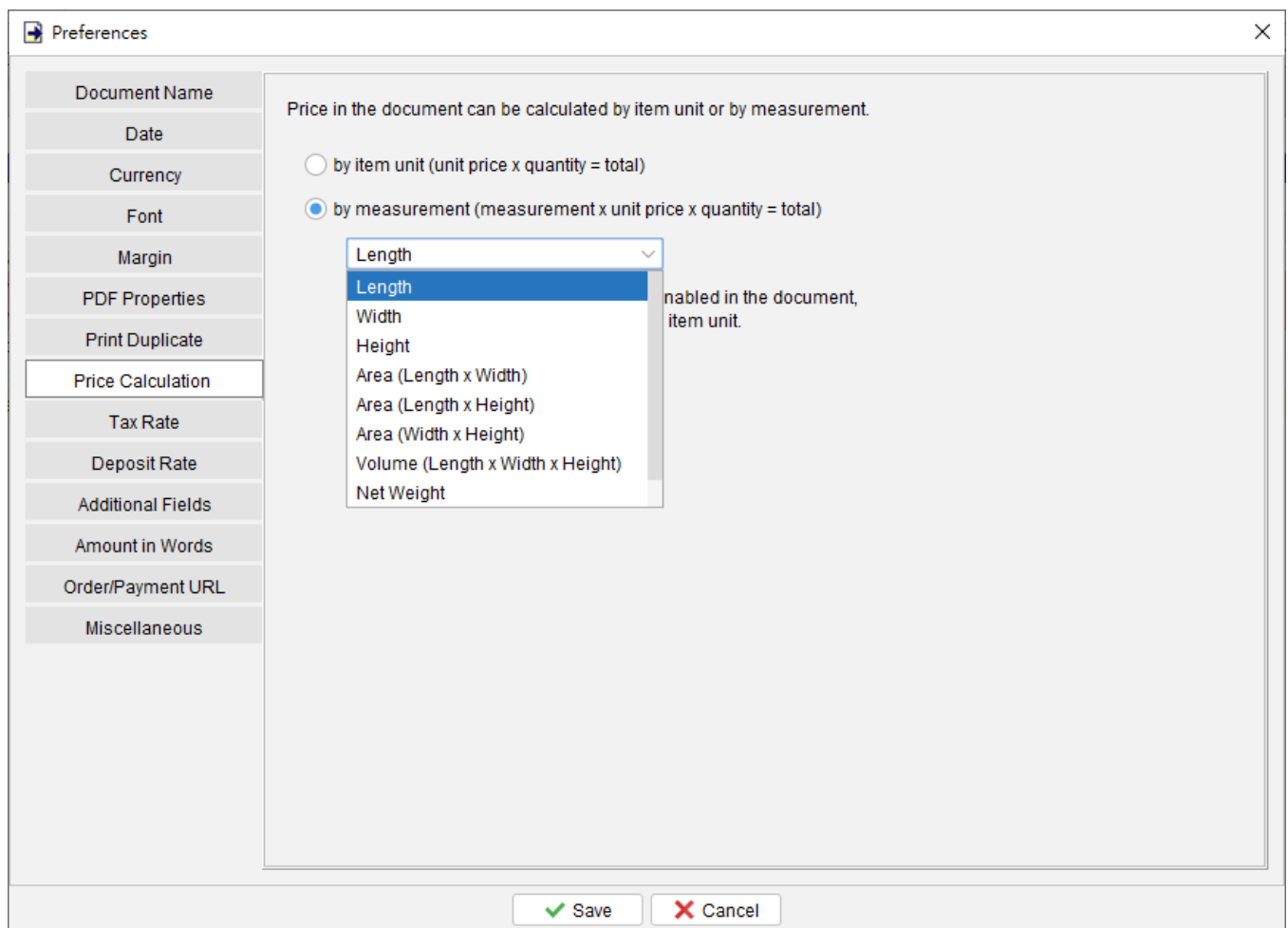
Furthermore, you can customize the labeling of the original or duplicate copies of the document. By specifying a label, it will be printed on the top right corner of each copy, ensuring clear identification and differentiation between the various copies.



11.12.3. Price Calculation

In EasyBilling, the default calculation for the total amount of a line item is based on the quantity and unit price. However, you have the flexibility to modify the calculation method for line items by incorporating different measurements such as length, height, width, area, or volume.

By allowing this customization, EasyBilling enables you to adapt the calculation logic according to your specific needs. This feature is particularly useful when dealing with items that require measurements to determine their total price accurately.



11.12.4. Tax Rate

EasyBilling offers the flexibility to incorporate up to three tax rate fields for calculating the tax amount of your documents. These tax fields can be configured to calculate taxes based on the total amount or the total amount plus other tax fields.

Additionally, you have the option to specify whether the shipping, packaging, and insurance fields should be subject to taxation or remain tax-exempt.

In cases where tax fields are not applicable for your country's requirements or if you simply do not need them, EasyBilling provides the ability to hide all tax-related fields completely. This allows for a streamlined interface that aligns with your specific taxation needs.

The screenshot shows the 'Preferences' dialog box with the 'Tax Rate' tab selected. The left sidebar contains a list of preference categories: Document Name, Date, Currency, Font, Margin, PDF Properties, Print Duplicate, Price Calculation, Tax Rate (highlighted), Deposit Rate, Additional Fields, Amount in Words, Order/Payment URL, and Miscellaneous. The main content area includes the following settings:

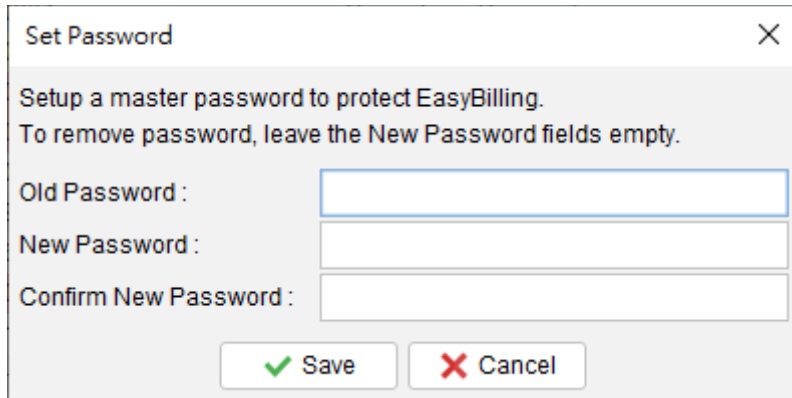
- Hide all tax related fields and columns in software. [?]
- If tax rate is provided, tax amount will be calculated automatically. But you can overwrite tax amount in document.
- Tax Rate 1: 1.25 % Calculate against Total
- Tax Rate 2: % Calculate against Total
- Show Third Tax box
- Tax Rate 3: % Calculate against Total
- Rounding Tax to : 2 decimal points :
- Shipping field is taxable
- Packaging field is taxable
- Insurance field is taxable

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

12. TOOLS

12.1. Set Password

To enhance the security of your EasyBilling system, you have the option to set a password. Each time you start EasyBilling, you will be prompted to enter the password. If you wish to remove the password, simply enter the old password and leave the other fields blank. Clicking [Submit] will remove the password.

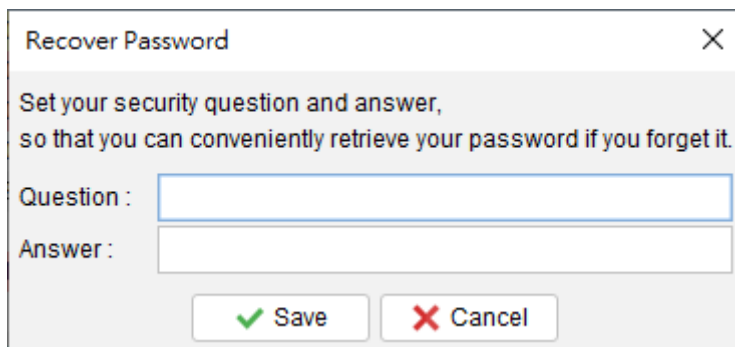


The 'Set Password' dialog box contains the following elements:

- Title bar: 'Set Password' with a close button (X).
- Instructions: 'Setup a master password to protect EasyBilling. To remove password, leave the New Password fields empty.'
- Fields: 'Old Password:', 'New Password:', and 'Confirm New Password:' each followed by a text input field.
- Buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

12.2. Recover Password Option

You can set a recovery password option by specifying a question and answer. In case you forget the password, you can click the [Forget Password] button in the Password Dialog. EasyBilling will display the pre-set question. If you answer the question correctly, the password will be revealed. To configure this "Password Recovery Option," you must input the password to confirm that you have the necessary access rights for EasyBilling.



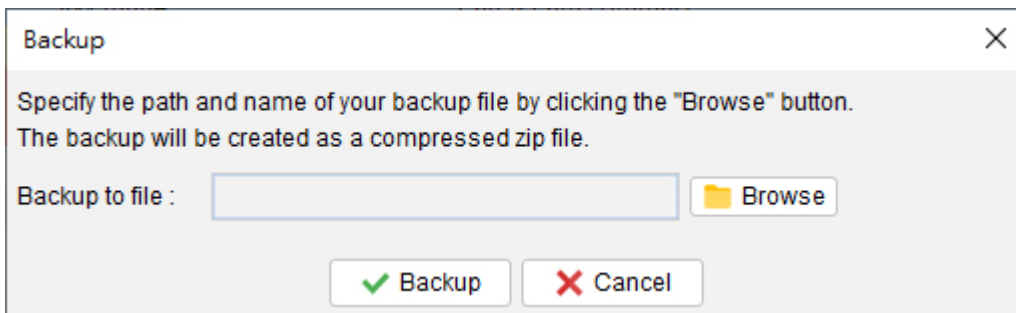
The 'Recover Password' dialog box contains the following elements:

- Title bar: 'Recover Password' with a close button (X).
- Instructions: 'Set your security question and answer, so that you can conveniently retrieve your password if you forget it.'
- Fields: 'Question:' followed by a text input field, and 'Answer:' followed by a text input field.
- Buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

12.3. Backup

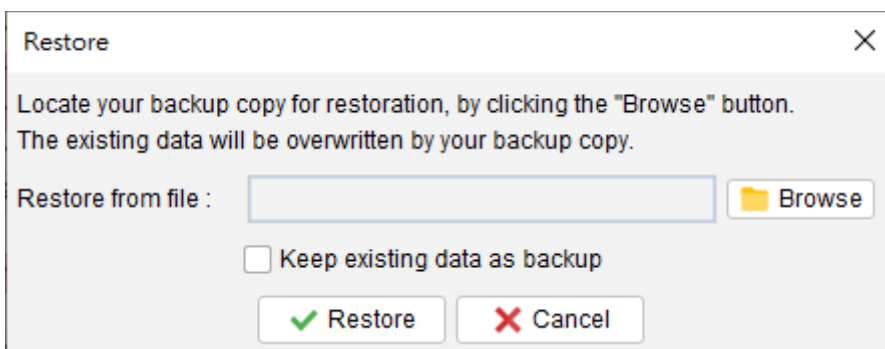
EasyBilling offers the ability to create a comprehensive backup of all your data. This backup includes all documents, reports, customer lists, supplier items, item lists, and software settings in the current workspace.

To initiate the backup process, click on the [Browse] button and specify a filename for the backup file. The backup will be created in a zip format, ensuring that all the necessary data is securely stored and compressed for efficient storage.



12.4. Restore

You have the ability to restore backup data in EasyBilling effortlessly. By clicking on the [Browse] icon, they can locate and select the backup zip file. Once the backup file is chosen, EasyBilling will initiate the restoration process. This process involves the restoration of documents, reports, data, and all software settings from the backup file.

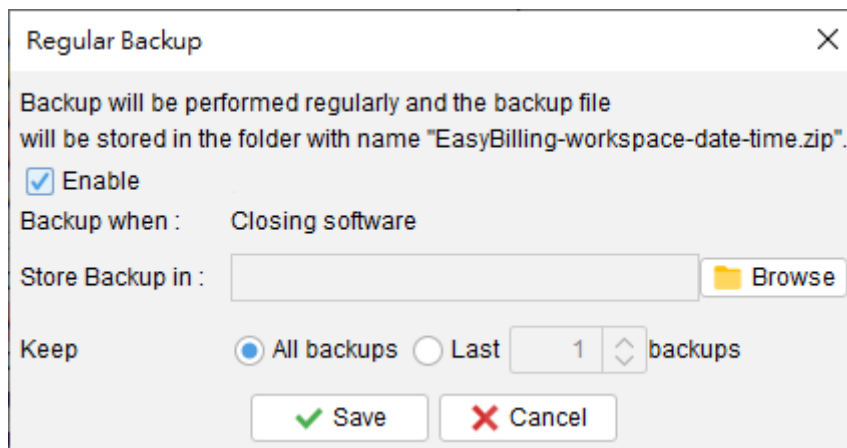


12.5. Regular Backup

EasyBilling offers you the option to enable the regular backup feature, ensuring that backups are automatically created when closing the software.

To set this up, simply click on the [Browse] icon and select a folder on your computer where you want the backup file to be stored. The backup file will be saved in the selected folder in a compressed zip format, containing the documents, settings, and all the data in the current workspace.

Additionally, you have the flexibility to specify the number of backup file copies you wish to keep.



The screenshot shows a dialog box titled "Regular Backup" with a close button (X) in the top right corner. The dialog contains the following text and controls:

- Text: "Backup will be performed regularly and the backup file will be stored in the folder with name "EasyBilling-workspace-date-time.zip"."
- Checkbox: Enable
- Text: "Backup when : Closing software"
- Text: "Store Backup in : " followed by an empty text input field and a "Browse" button with a folder icon.
- Text: "Keep" followed by two radio buttons: All backups and Last. To the right of the "Last" radio button is a spin box containing the number "1" and the word "backups".
- Buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

13. REGISTER

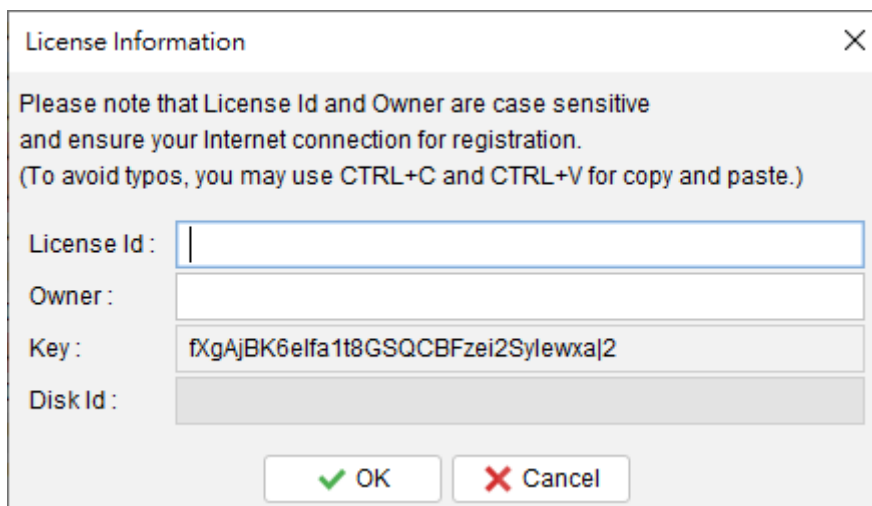
13.1. Trial Version

The Trial Version of EasyBilling offers the same functionality as the registered version; however, it has a limitation where you are only allowed to create a maximum of 25 documents in total. To unlock the full potential of EasyBilling and remove the restrictions imposed by the Trial Version, it is necessary to obtain a license and register your copy of EasyBilling.

13.2. Registration

To register EasyBilling,

(1) Go to menu "Help > Register", registration window is shown out.



The screenshot shows a dialog box titled "License Information" with a close button (X) in the top right corner. The dialog contains the following text: "Please note that License Id and Owner are case sensitive and ensure your Internet connection for registration. (To avoid typos, you may use CTRL+C and CTRL+V for copy and paste.)". Below this text are four input fields: "License Id:" (empty), "Owner:" (empty), "Key:" (containing the text "fXgAjBK6elfa1t8GSQCBFzei2Sylewxa|2"), and "Disk Id:" (empty). At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

(2) Fill in the "License Id" and "Owner" information and click "OK" to register. Please ensure the Internet connection when registration is in process. Afterward, restart the EasyBilling to effective the license.

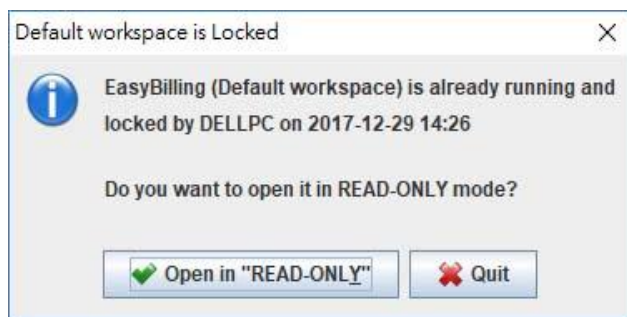
Note: If firewall is setup and block the connection of registration, the registration cannot be completed. You may temporarily disable the firewall to allow the registration go through.

14. DATABASE LOCKED

14.1. Database locked / Read-Only Mode

EasyBilling is designed as a standalone software that implements a database lock mechanism to safeguard the integrity of the data. When EasyBilling is running, it locks the database to prevent concurrent access.

If a second instance of EasyBilling attempts to run on the same database (Workspace) simultaneously, a dialog will appear notifying you about the situation. In this dialog, you have the option to run EasyBilling in READ-ONLY mode.



When running in READ-ONLY mode, you can create, edit, preview and print documents and report as usual. However, you cannot create or modify customer, supplier or item information, or adjust software settings.