

Thank you for your interest in Microsale's Invoicing System (Lite Version). Please find below instructions for downloading the setup file that will install the latest version of Microsale Invoicing Demonstration Version onto your computer, and also some useful information about the program.

(A) To download and install the trial program:

Go into the following web page link. <http://www.microsalenz.com/search.htm>

Then choose,

[Microsale Invoicing Demo Lite Installation](#)

Save the setup file to your desktop (or any folder you wish) and run it to install the latest program update. Just click on OK when prompted during installation.

If there are any hassles at all please give me a call on 03 467 2888 or 027 4861444

Start the Microsale Invoicing System from the icon created on your desktop

The Main Menu screen will appear.

You can view (and print if you wish) the latest manual that explains the features of the program in detail by clicking PDF here.

- Click on Invoicing System to run the program.
- Copyfiles to automate the Copying of your data to a USB or other backup drive.
- Rebuild Indexes is a program that keeps your data files in order
- Invoicing Backup is a Compression backup program for those of you still with a floppy disk drive.
- Address Book to quickly look up a phone number.



Getting Started Guide – see next page

The LITE version lacks the following functionality over the FULL version.

- (1) No Inventory Analysis
- (2) No External Pricebook importing
- (3) No individual client discounting for the same Pricebook item.
- (4) No Kits
- (5) No Quoting or Estimates

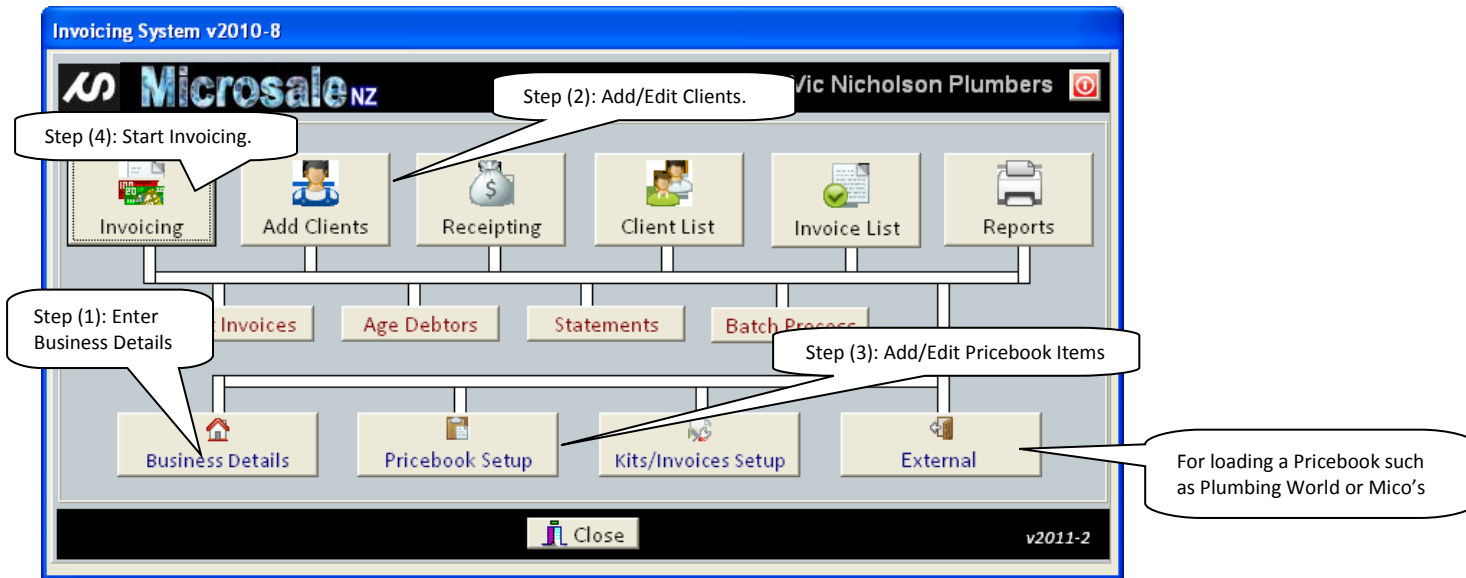
Getting Started Guide :

On starting the program from the Main Menu the first screen that will appear is the Quick Menu screen. You can quickly move to any part of the program from here.

Help is available throughout the program in the form of [?] buttons, as well as short help notes that appear under the mouse pointer.

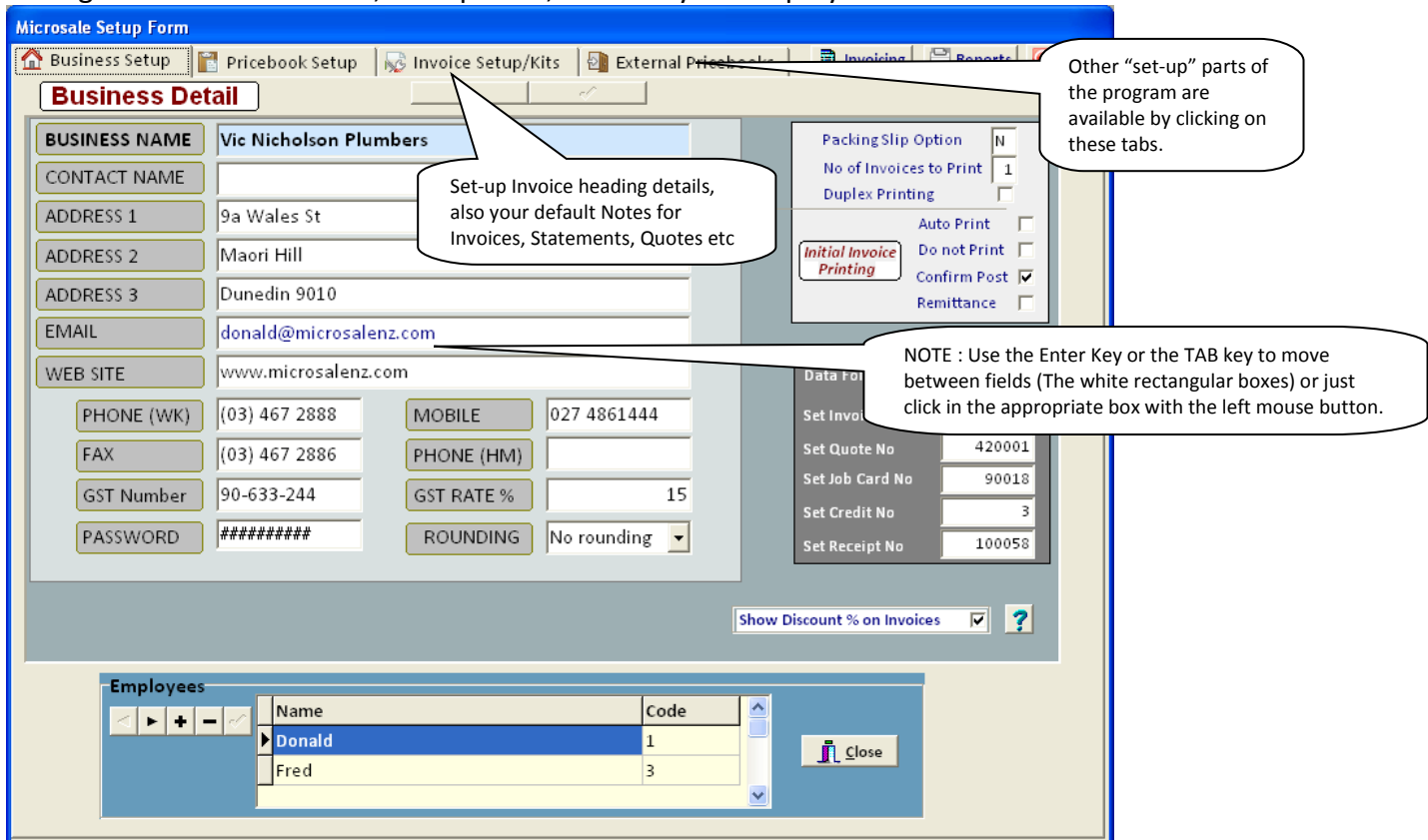
Microsale's Quick Menu

Click on any button to take you to that part of the program. Follow the steps as listed below.



Step 1 **Set up Business Details :**

From this screen you may add your address, GST No, what rounding (if any) you require on Invoices, starting numbers for Invoices, Receipts etc, and also your employee details.



Step 2 Add/Edit Clients :

The "Navigator Bar" : use this for scrolling through clients, + for adding, - for deleting etc.

As well as adding Clients, these tabs take you to other client related parts of the program (Receiving, individual statements, re-printing invoices etc). Try it out.

Enter the Business Name, or the Last-name of an individual. Followed by First-name (if required), etc

The **Post** button will save the current record permanently.

Step 3 Add/Edit Pricebook Detail :

Enter your own easy to remember Code for the commonly used items.

As well as using an External Pricebook like Plumbing World, Mico etc, you will have to enter your own codes for labour, mileage etc

Enter the Cost Price and a markup or enter the Price incl GST (or excl GST) and the Cost Price to calculate the Markup.

Click on the **POST** button (or press the [F2] key to save. (Post = Save)

Step 4 **Invoicing** :

The screenshot shows the 'Microsale Invoicing System' interface for 'Vic Nicholson Plumbers'. The main window displays client information for 'MICROSAL NZ' (Donald Logie, 9a Wales St, Dunedin 9010) and an invoice for 'LABOUR' (12 hours at \$30.00/hr, total \$288.00). The interface includes a 'Client Search' field, a 'Job Description' section, a table of items, and a bottom panel with buttons for 'Past Invoices', 'New Invoice', 'Kit Screen', 'POST', and 'Close'. A summary box on the right shows 'Total excl GST \$288.00', 'G.S.T \$43.20', and 'Total incl GST \$331.20'.

Callout Boxes:

- Client Search:** Search by Business Name (try typing just the first letter) or Client Code (Number).
- Invoice Type:** Click here to change to a Job-Card, a Quote, a Credit invoice etc.
- Job Description:** Job Descriptions. Any number can be saved and retrieved.
- Pricebook Code:** Pricebook Code. If you have some prices already loaded, type in the code or press [F6] to search or click on [...]. Press . (fullstop) then press TAB or ENTER to type in your own description. You can also use this fullstop as a blank line or as an extra job description.
- Calculator:** Calculator. Instead of trying to find the one your son or daughter borrowed.
- POST Button:** Click POST when finished to save and print your invoice.
- Bottom Panel:**
 - Past Invoices:** View and/or re-use past invoices. You may also re-print past invoices, view payments etc.
 - New Invoice:** Start Invoice from scratch.
 - Discounts:** Discounts – Adjust in the Set-Up Pricebook area.

I hope the above has been enough to get you started.

Try out any sections not covered here eg reports, sub-menus etc. I'm sure you will find lots of other useful parts to the program that you can use.

My main aim though is ease of use and therefore fast production of Invoices, receipts and Statements!

Please give me a call with any queries, I'm very happy to help.

Regards,

Donald
Microsale NZ