USER MANUAL

EZ INVOICE, INC™
Invoicing done the EZ way!

This owned license will allow you to run **your version** of **EZ Invoice, INC ™** software on your server (one URL) for an unlimited amount of time. Installation is available at $65 per hour by contacting support@ezinvoiceinc.com

Warranty: If you're **your version** of **EZ Invoice, INC ™** does not work with your hosting company, we may refund you back your money and remove the software from your server for you! Please request the refundezinvoiceinc.pdf form and either mail/fax it back to us. This request must be brought to our attention within four days from your date of purchase or this offer will not be valid. Please note: Charges may apply for un-installing software from your server or refunding your money through paypal.

EZ INVOICE, INC™
Invoicing done the EZ way!

Contact Information:

Corporate Headquarters
Seth Matson, President

EZ Invoice, INC ™
P. O. Box 26
Huntington Beach, CA 92648 (714) 493-3777 support@ezinvoiceinc.com

Technical Support

Visit our website at www.ezinvoiceinc.com for FAQs

CONTENTS

Chapter 1 About EZ Invoice, INC ™

This software allows the non-accountant to create and manage invoices online with just the click of the mouse from anywhere in the world. All you need is a **website with Internet connection. **EZ Invoice, INC™** was created for the small business person: mom and pop shops, sole proprietors, small graphic studios, online start ups, solopreneurs, virtual assistants and more. **EZ Invoice, INC™** features a Client Loungewhere your clients can login to view, print, and even pay their invoices online by Credit Card (PayPal integration).

Below, you can view a list of some of **EZ Invoice, INC ™** key features. You are invited to login and try a free demo as either a Client or an Administrator so you can see how EZ the software is to use via www.ezinvoiceinc.com. Some updates may have occurred since this UserManual was created. Please visit website for more info on Updates.

Key Features:

EZ INVOICE, INC™ Software

- Create custom username and passwords
- E-mail PDF invoices to clients anytime
- Add/delete unlimited amount of clients
- Client's Page management in a snap
- Printable invoices in PDF or HTML format
- Payment status is color-coded for visual ease
- Add unlimited invoices
- EZ edit of all invoices
- Create duplicate Invoices
- Hide or Show invoices in client lounge
- Create custom "bill to" text on invoice to fit your needs. (example: Remit to, Make Payment to, etc…
- Add a custom note to your clients on every invoice

Your Personalized Invoice

- Invoice customization with your company's logo
- Accept Credit Cards via PayPal in Client Lounge
- Make unlimited changes to your invoices
- View all invoices on one page
- View all overdue invoices on one page
- View all paid invoices on one page
- Add/Delete notes for clients in Client Lounge
- Lost password finder
- Add shipping, tax and discounts to your invoices

Exporting Reports

- Admin and Client Lounge can print spreadsheets for end-of-year tax reports
- Export client mailing list (.xls doc) for mailing labels in Microsoft Word and more!

** EZ **Invoice, INC** ™ runs on PHP (version 4.3.8 or above).and MySQL. 99% of hosting servers have PHP and MySQL technology. Check with your host before ordering your new version of **EZ Invoice, INC™**

Chapter 2 Logging On

You can log on to your version of **EZ Invoice, INC ™** via your website address followed by /admin (example: www.yourwebsite.com/admin) once it is installed.

This is the first screen you will come to.

A sample username and password were given to you when you purchased EZ Invoice, INC ™ After logging in as an Admin, you should go to the link Configure Your EZI Settings and create a custom username & password. Notice that your Username and Password are case sensitive.

Very important!

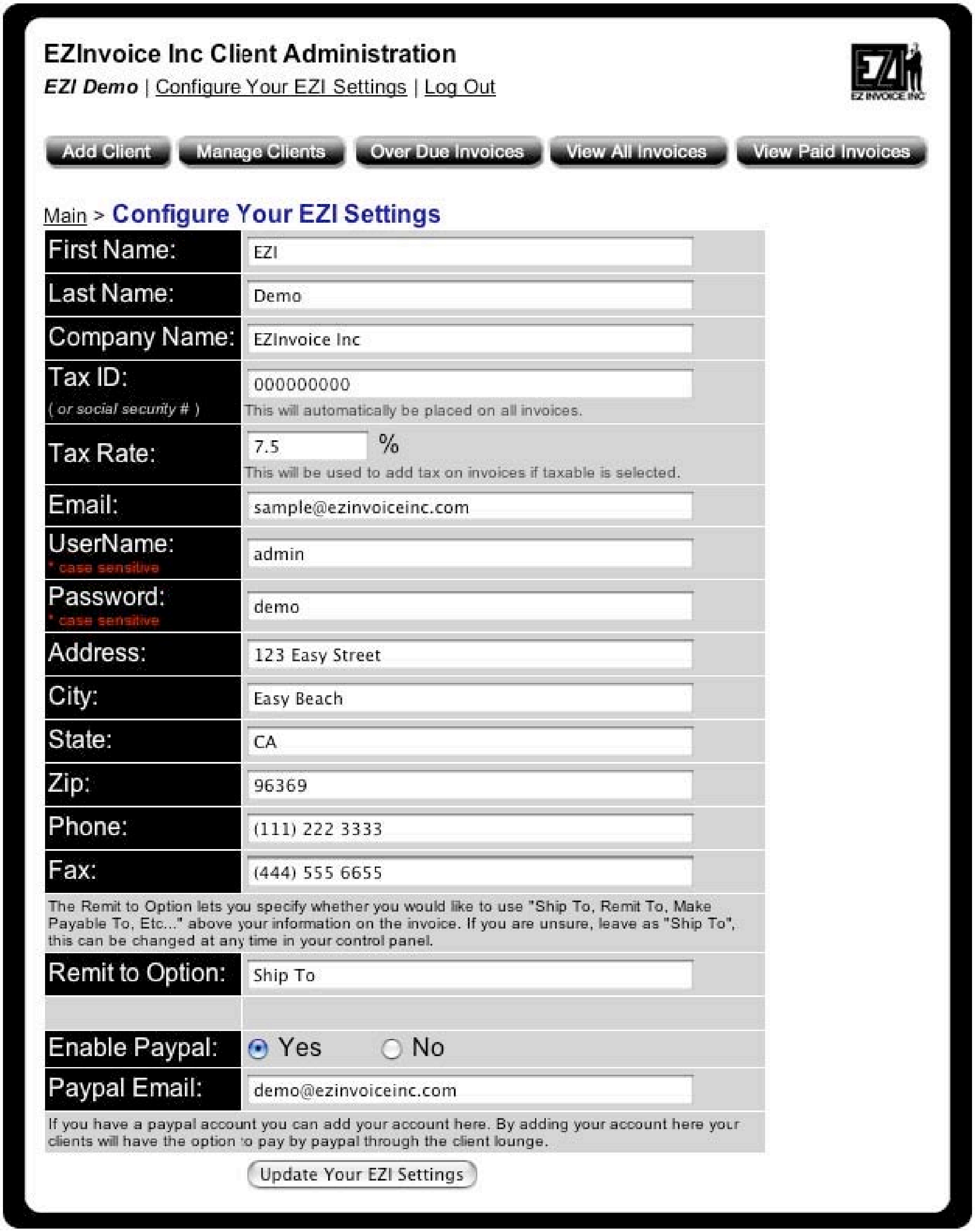
Sample User Name and Password: (create your own)
Username: **johndoe**
Password: **bigfro**

You should write down your new user name and password here for future reference:
Username:_____________
Password: _____________

User hint: if your username and password gives you trouble logging in, try it more than once! Since this software is running online, there could be downtime on your server, so just try again till it works. ;) If you cannot access the software using your username and password, please contact us at support@ezinvoiceinc.com (but remember to write it down in a safe place!)

Chapter 3 Administration/Main Page

First: Configure Your EZI Settings



Fill this page out in its entirety. This will become the Bill To (Ship to)information on your invoices.

Initially, this page will not contain any info until you add it in yourself. It’s wise to fill in every single line of the form so that your invoices look professional. If you dont have a company name just leave it blank. The invoice will automatically put your first and last name in the correct places on the invoices.

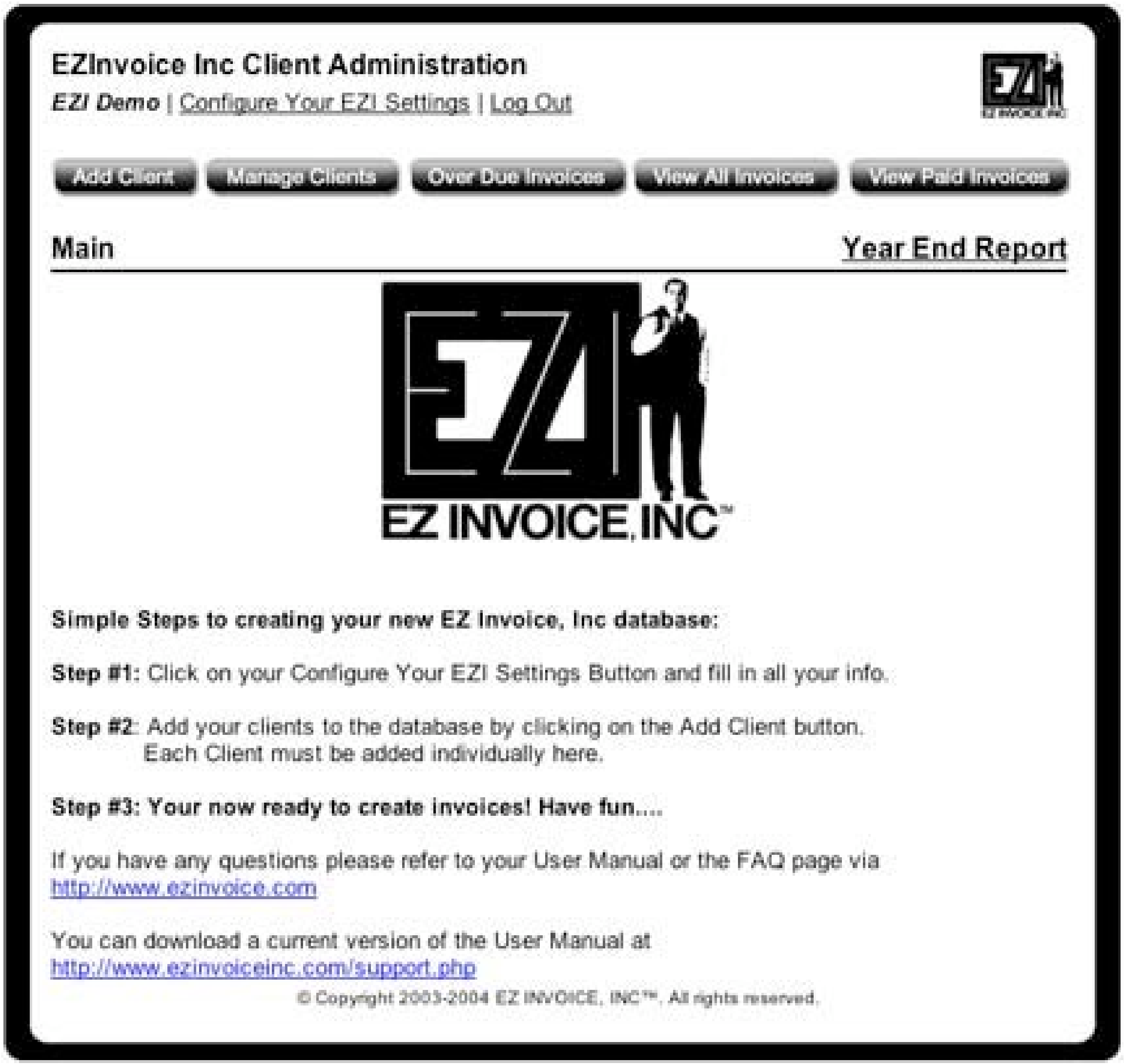
You should add your Tax ID/Social Security number if your clients 1099 you at the end of the year. (This is just an option for your client's convenience at the end of the year but not necessary) Another cool feature is the Tax Rate: Just type in **your** state tax rate in the state tax box, and the invoices will automatically add the tax when you use the **Yes/No** drop down menu on the invoice. As the Admin, you can also change your Username and Password on this page at anytime.

You can now type in any text in the Remit to option that best fits your needs. (example: Bill to, Remit to, Ship to etc…)

If you have a PayPal account, be sure to click enable PayPal and type in your PayPal email address in the box below it. When your clients get an invoice from you and PayPal is enabled, they will be able to make payments directly from the Client Lounge and all invoices sent via email. This gets you your money faster and easier!

Be sure to click on the Update Your EZI Settings button before leaving this page or you will not save all your hard work.

Main Page



From the Main Page you can access all the different pages. The most important button on the Main Page is the Year End Report button. This is where you can download your Year End Report and save it to your computer after you back it up.

At the end of the year, you will want to clear out all your past paid invoices and start fresh for the new year. To do this, first download the Year End Report excel spreadsheet by clicking the Year End Report button. Then, back it up on your computer. After backing it up, you can click the "Click Here To Clear All Paid Invoices" button. By doing this, you delete all paid invoices from that fiscal year.

Attention: By deleting all paid invoices you will not be able to view them ever again. That is why you must back up the Year End Report before clearing them out!

Chapter 4 Demo Steps

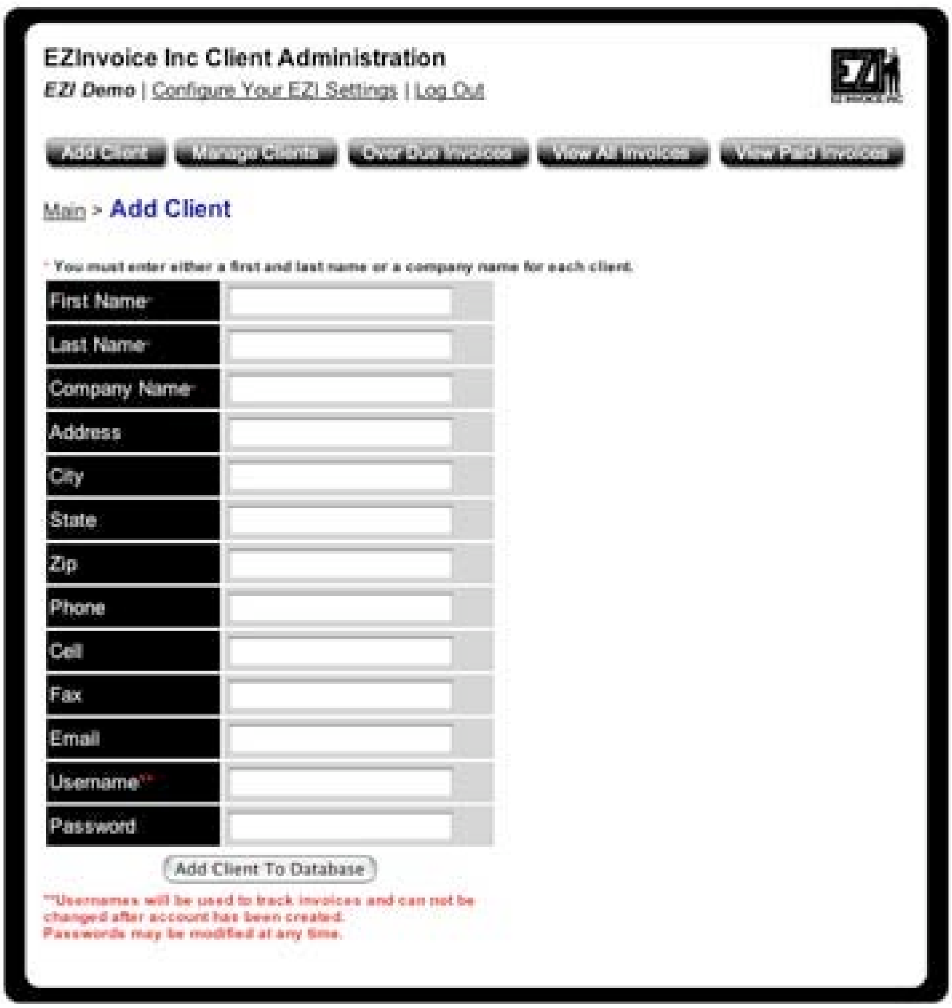
The steps of going through the DEMO via www.ezinvoiceinc.com:

1. 1. Click on Add Client (we recommend adding your own name and email just to test

the waters but use a different username and password so you can view it later in the Client Lounge) then, click on Add Client to Database.
2. 2. Click on Manage Clients to view your company you just created in the Add Client page. From here you can create invoices, email invoices, print invoices and so much more.
3. 3. Log out after you have created a few invoices.
4. 4. Log back in to the Client Lounge to view how your clients can go in and view invoices, etc. To do this, just enter the username and password you created when you added yourself as a Client in the Add Client page.
5. 5. Once logged in to the Client Lounge, you can view what your client would be able to see if they logged in. They would see every past invoice you have submitted to them and even pay over due invoices via PayPal!

Chapter 5 Add Clients

These steps are similar to the demo steps. Just make sure you fill this page out entirely and create a username and password for the client. (**Very Important Note**: the **Client** Username cannot be changed once created, but the password can be changed anytime, so be wise in choosing a Username for your clients.)

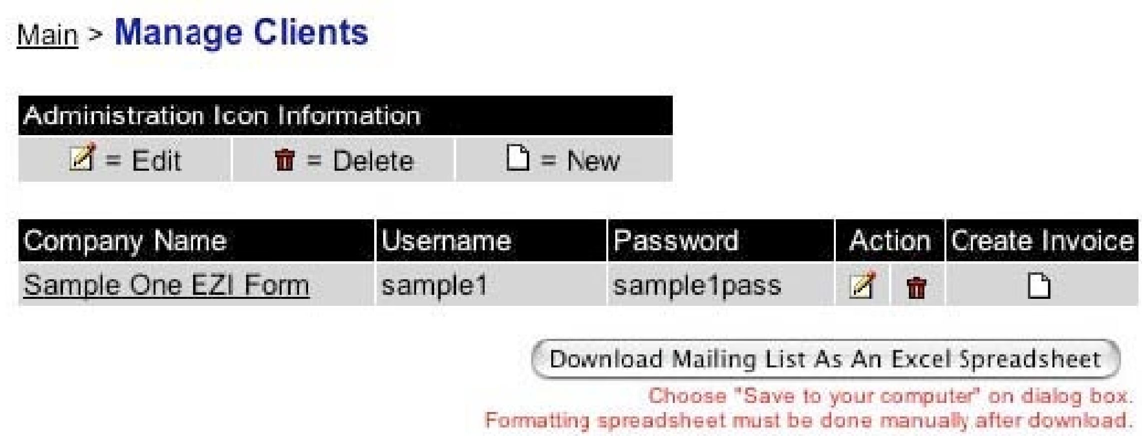


Initially, this page will not contain any clients until you add them in. It's wise to fill in every single line of the form so that your invoices look professional. If your client doesnt have a company name just leave it blank. The invoice will automatically put their first and last name in the correct places on the invoices.

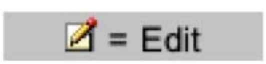
To save the work you did, make sure you click the Add Client To Database button at the bottom of the page. By clicking this button, your new client will be added to the database. You can then view them in the Manage Clients button. (see Chapter 6.)

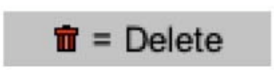
Chapter 6 Manage Clients

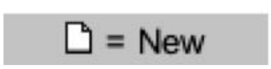
A spreadsheet view of your clients will appear on this page. It will look like something like this:



This Legend explains the possible actions for each Client on any page where the icons appear.







Click this to edit information on any page that has this Icon.

Click this to completely delete an item from the database.

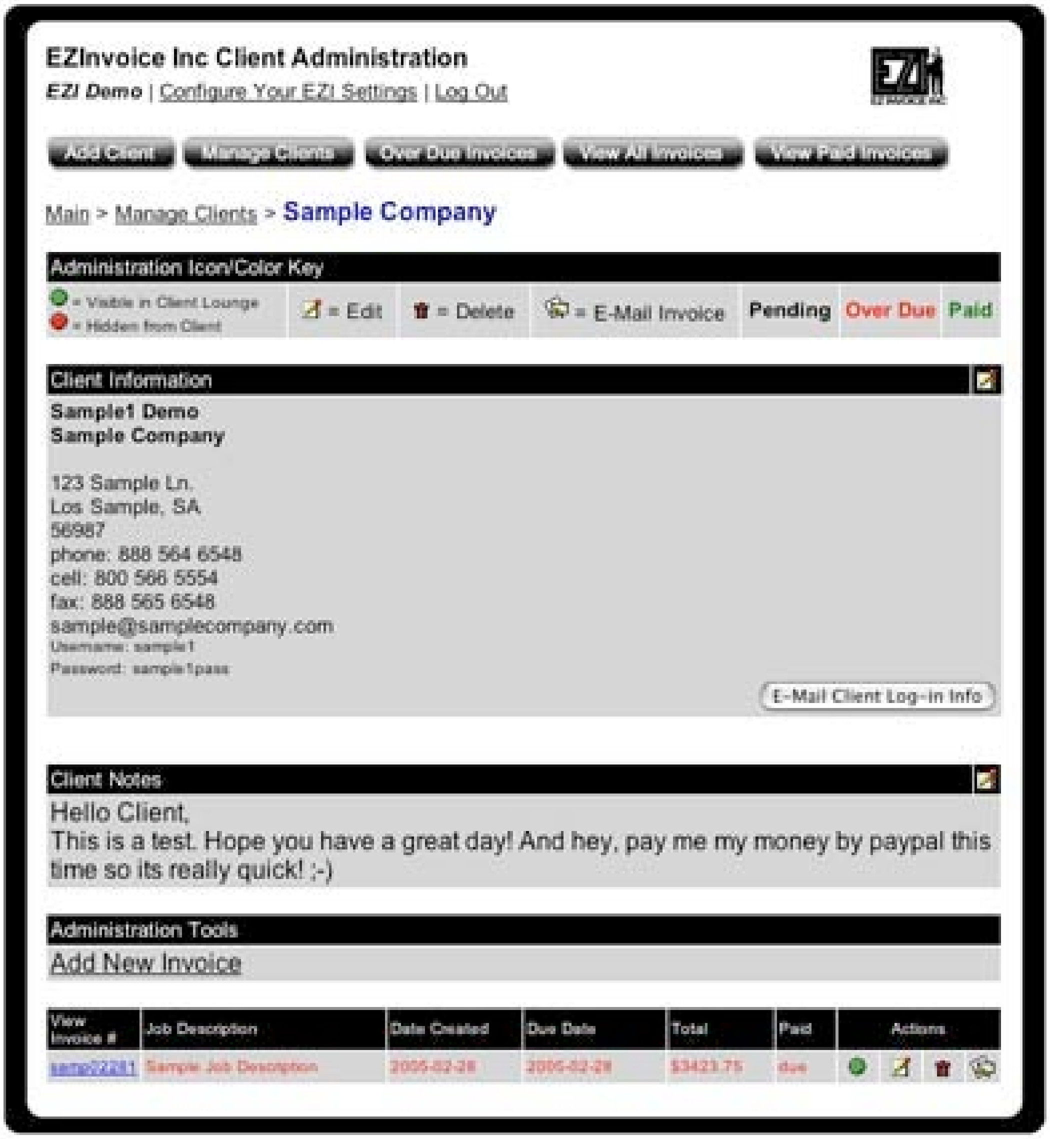
Click this icon when you want to create a new invoice.

About Download Mailing List as an Excel Spreadsheet Button:
(located at bottom of the page)

When you click on this button, your entire database will be downloaded as an Excel Spreadsheet to your desktop. You must choose save file! Then, you can open it from your desktop. From there, you can use it in many different ways of your choosing.

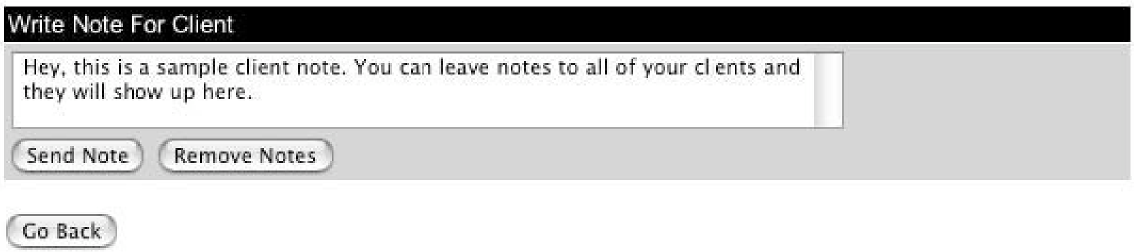
Excel Spreadsheets export easily into other software, like Word, or Access, or Outlook. Please follow the directions in those software packages to create a database, create mailing labels, perform a sort, etc.

When you select one of the records for your clients under "Company Name/ Client Name" from the Manage Clients page, you will see the following page: From this page, it is very simple to change a client's information. Just click in the appropriate field, and change it.



You can simply click on the E-mail Client Log-In Information button, and send the client his User ID and Password for accessing their Client Lounge.

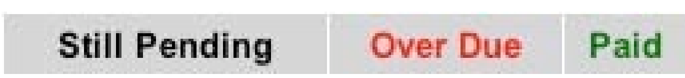
You can send your client a note by clicking the Click Here under Client Notes. Then, type your note to the client under "Write Note For Client" dialog box. When finished, click "Send Note." The note will now appear in the Client Lounge when your client logs in the next time. To remove, just click the edit button on the Client Notes section and click the Remove Notes button.



A new feature in the Manage Clients page is the Make Visible and Hide function for the client lounge. By just clicking the red or green dot this will activate each invoice to either be visible or hidden to the client.

Under **Administrative Tools,** from the Manage Clients page, you can also add an invoice by clicking on Add New Invoice . Follow the Invoice instructions in Chapter 7 following although, frankly, Granny thinks you could do it on your own, you're so smart.

In the Administrative Tools section, you can also look at any of the invoices pending for a client. Here's a red hot tip from Granny: **THEY'RE COLOR-CODED!**



Black means Still Pending.

Red means Overdue.

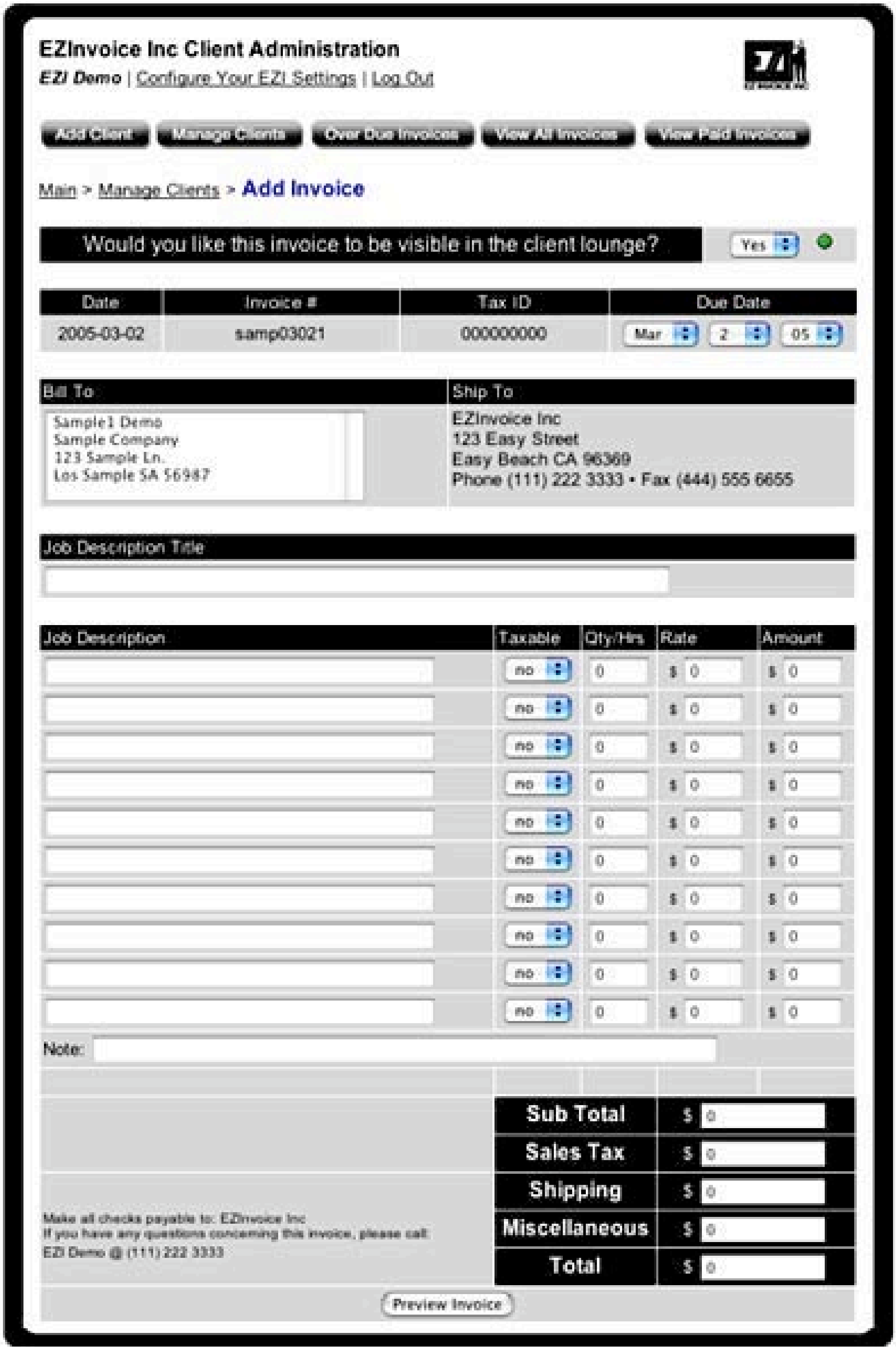
Green means Paid.

So, you can tell at a glance which invoices are not paid, which are overdue, and which are paid.

You can edit your invoice to mark them as paid or unpaid via the Make Changes button when you click on any invoice…(Shortcut would be to just click the edit icon in the manage clients page. This will take you directly to the editable invoice)

Chapter 7 Invoicing Your Clients

When you click on the link Add New Invoice, this invoice will appear.



The software automatically enters today's date, the Invoice #, your TAX-ID #, today's date in the Due Date field and the Bill to/Ship to info into each invoice. The Invoice # is the first four letters of your clients name, the month, date, and a number starting with #1 for the number of invoices to this client for the day. (example: Client Name- sample, Date Oct, 15th = **samp10151**.

- You can choose to make visible or hidden to the client on the first line.
- Enter the specific Due Date. If you do not change the date, the software will enter today's date.
- Enter a Job Description Title, like Building Bookcases, Logo Creation, etc.
- Enter each line item, and be sure to enter Yes or No under Taxable if applicable.
- Enter the number either Qty or Hrs that you are billing the client.
- Type in your hourly rate or unit cost. The amount will auto fill in when you click on the amount box.
- If you would like to add a comment, you can do so by just typing in text in "Note: section of
  the invoice.
- You must enter your Shipping costs manually.
- The Miscellaneous field can be used for discounts, or to add special costs.
- To give a discount you can do it two ways:
  - Sample Price: $1,650.00

    Either type in a Job Description box (10% discount), then in Qty, type 1. Then type in percentage in the Rate field as a minus (-165.00) and the amount will automatically subtract the quantity in the total. (see below)

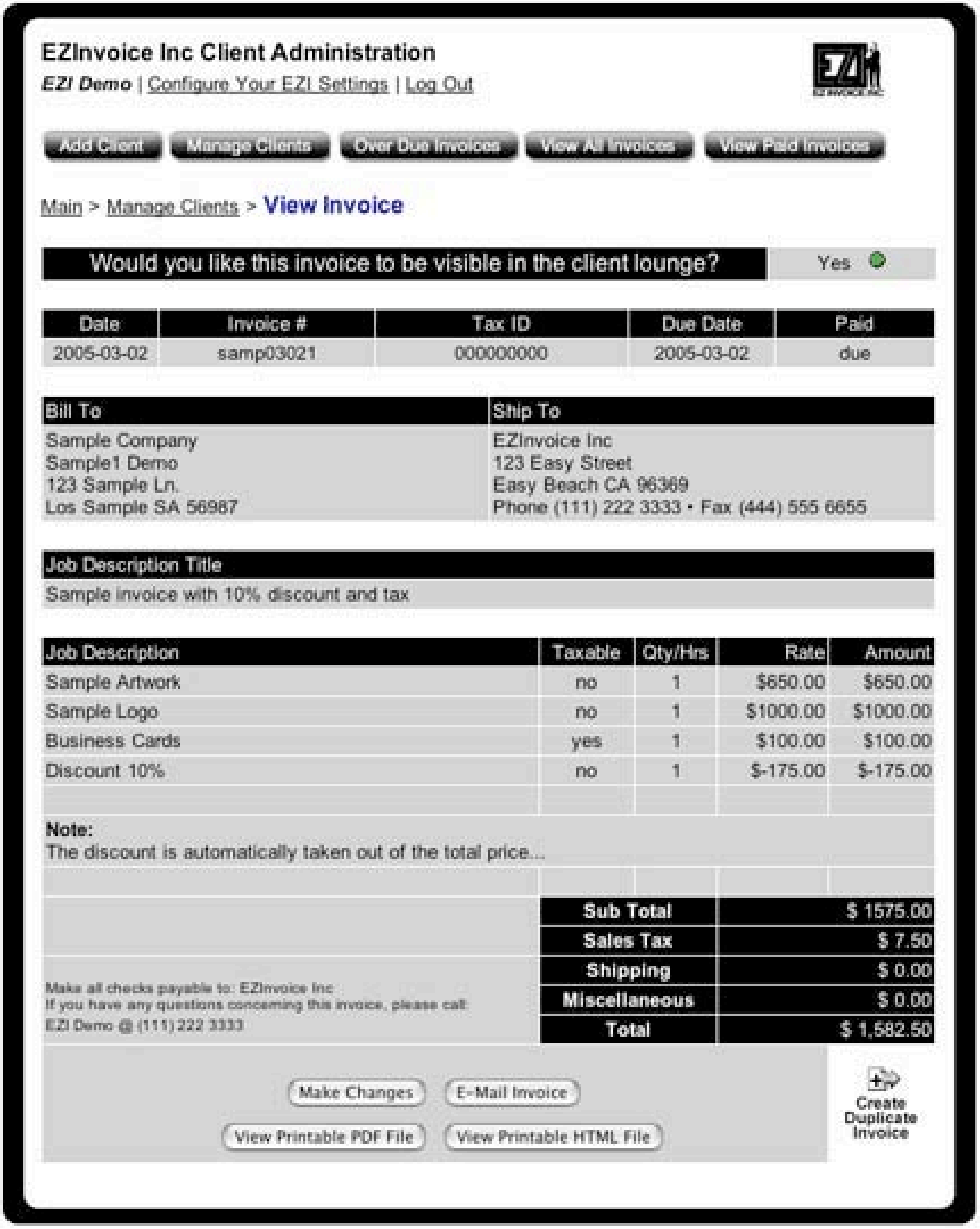
Job Description	Taxable	Qty	Rate	Amount
Discount 10%	no	1	$-165.00	$-165.00

- Or, in the miscellaneous box, you can use the –(minus) and the dollar amount you wish to discount.

Sub Total	$ 1650
Sales Tax	$ 0
Shipping	$ 0
Miscellaneous	$ -165
Total	$ 1485

Helpful hint: The Qty/Hrs, Rate and Amount sections should always be left as "0". If you get an error (NAN) please re-type in all zero's in that line and start over. You can type a message in the Job Description lines without typing in the Qty/Hrs, Rate and Amount sections.

Below is a preview of a sample invoice for you to look at with a 10% discount.


EZInvoice Inc Client Administration

EZI Demo | Configure Your EZI Settings | Log Out

Add Client | Manage Clients | Over Due Invoices | View All Invoices | View Paid Invoices

Main > Manage Clients > **View Invoice**

Would you like this invoice to be visible in the client lounge? Yes

Date	Invoice #	Tax ID	Due Date	Paid
2005-03-02	samp03021	000000000	2005-03-02	due

Bill To	Ship To
Sample Company Sample1 Demo 123 Sample Ln. Los Sample SA 56987	EZInvoice Inc 123 Easy Street Easy Beach CA 96369 Phone (111) 222 3333 • Fax (444) 555 6655

Job Description Title
Sample invoice with 10% discount and tax

Job Description	Taxable	Qty/Hrs	Rate	Amount
Sample Artwork	no	1	$650.00	$650.00
Sample Logo	no	1	$1000.00	$1000.00
Business Cards	yes	1	$100.00	$100.00
Discount 10%	no	1	$-175.00	$-175.00

Note:
The discount is automatically taken out of the total price...

Sub Total	$ 1575.00
Sales Tax	$ 7.50
Shipping	$ 0.00
Miscellaneous	$ 0.00
Total	$ 1,582.50

Make all checks payable to: EZInvoice Inc
If you have any questions concerning this invoice, please call:
EZI Demo @ (111) 222 3333

Make Changes | E-Mail Invoice
View Printable PDF File | View Printable HTML File

Create Duplicate Invoice

You will notice a “Create Duplicate Invoice” button at the bottom of every invoice. This is for creating duplicate invoices for clients you may have that you do the exact same thing for every time. It creates a new invoice with the same name but with the current date.

Click on the 

button after creating your new invoice. You will see your invoice as it will appear for your client, and you will then have the option of three more functions:

If you need to change the Invoice in any way, click the Make Changes button and re-preview it.

If you want to Save the invoice and NOT email it immediately, click the Save Invoice button.

If you want to Save the invoice and email it immediately, click the Save & Email button. When you Save & Email, the following screen will appear. **EZ Invoice Inc.** ™ has an auto message in

This option is only available when creating the invoice for the first time. If you make changes to the invoice you must just click save invoice. Then click the E-Mail Invoice Icon to email it to your client. You can also click on view invoice, view printable pdf and send the pdf invoice manually as well…

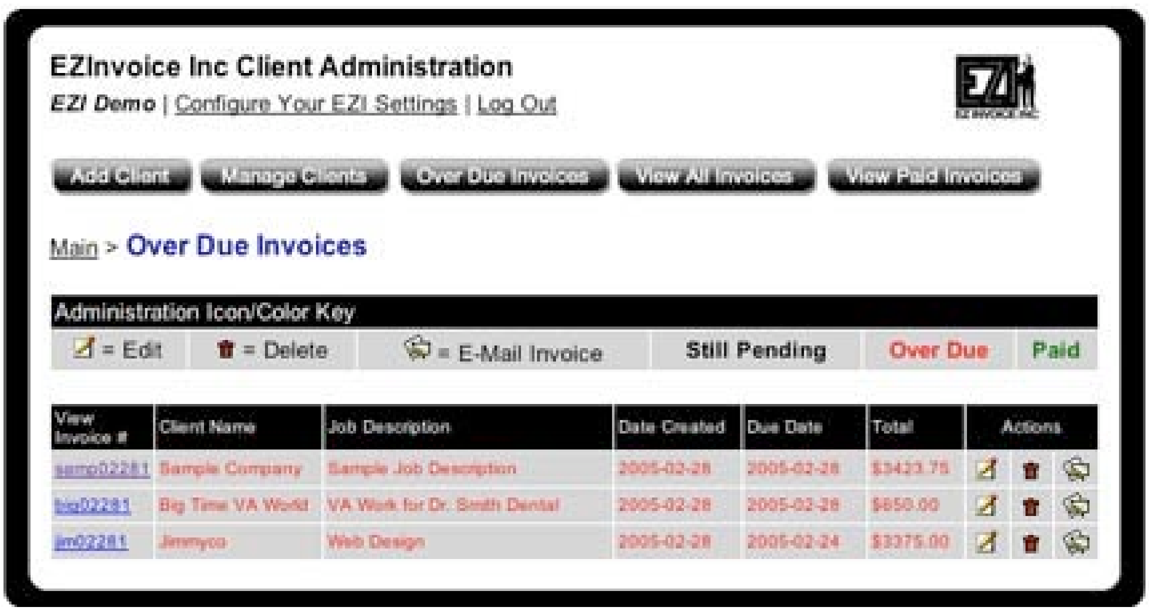
Once you click on E-Mail Invoice, a dialog or popup box pops us and announces the email has been sent. Click okay. Once you click on Okay, you will be taken back to the Client Page for the invoice you just sent.

The Admin Icon/Color Key bar appears at the top of the Client Page. It allows you to:

Make Visible/Hidden	Makes invoice either visible or hidden in the client lounge
Edit	Edit different sections of the Client page
Delete	Delete the invoice for that client (delete is different on different pages)
E-Mail Invoice	E-Mail invoice to a client
Pending	Invoice Pending
Over Due	Invoices Over Due
Paid	Invoice Paid

Chapter 8 Overdue Invoices

Here is a sample of the Overdue Invoices Page. It provides a list of those invoices that are over due in **red**.



The Admin Icon/Color key functions work the similarly on all pages.

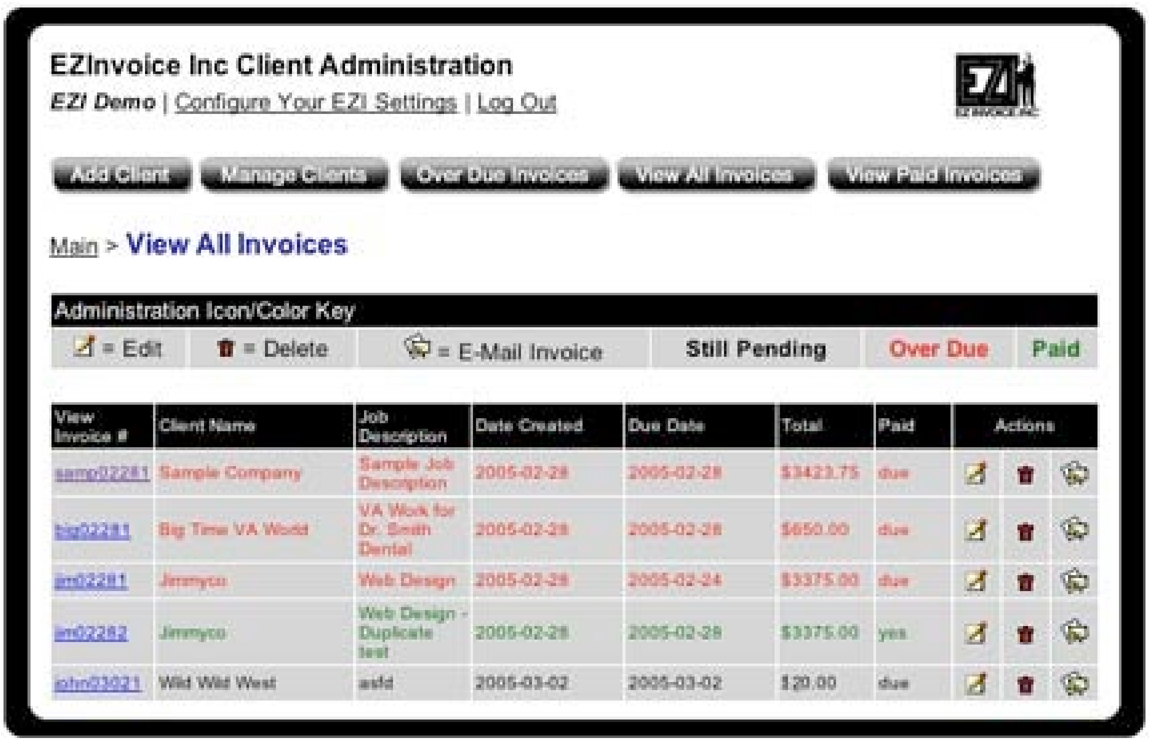
Over Due is a list of invoices not yet paid. Over Due invoices will always appear in Red until you manually go back in and mark them paid.

> PLEASE NOTE. When you receive a payment for an invoice, you need to open the invoice, and in the upper right hand corner below the word “Paid”, click on the drop down box and select “YES”.

This is how you move an invoice from Over Due to Paid Invoices. You will want all of your Paid Invoices in one place for the end of the fiscal year.

Chapter 9 View All Invoices

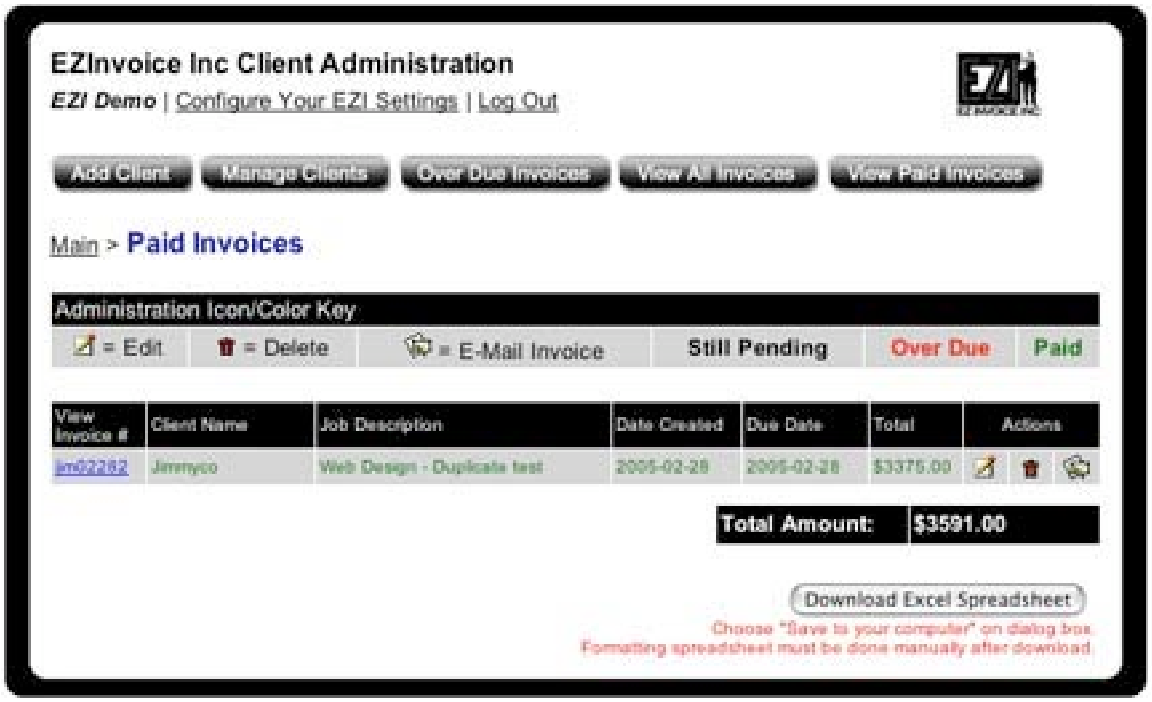
This is a summary page for you to view ALL the invoices. Here you can view Overdue, Pending and Paid Invoices. Note: all of the Admin Icon/Color Key function on this page, too.



Once you have 30 or more invoices, a new page will be created and a new page # link will be added at the bottom of the page. (see below)

Chapter 10 View Paid Invoices

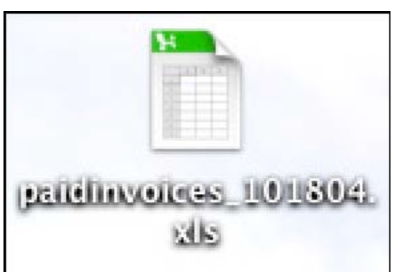
Here is what the View Paid Invoices page looks like.



This page is great to view how much money you have made for the year at that time. It's also good to view which invoices have been paid for easy communication with your clients if needed.

About "Download Excel Spreadsheet Button" for viewing Paid Invoices:

When you click on this button, your entire Paid Invoices database will be downloaded as an Excel Spreadsheet to your desktop. Choose Save File To Desktop. The file will be named "paidinvoices"thedate".xls. From there, you can use the document in many different ways.



Excel Spreadsheets export easily into other software, like Word, or Access, or Outlook. Please follow the directions in those software packages to create a database, create mailing labels, perform a sort, etc.

Your spreadsheet will not be formatted for the proper column widths. You can format them easily to look just like the image below by simply dragging the columns to the right until the words are fully legible.

paidinvoices_101804.xls

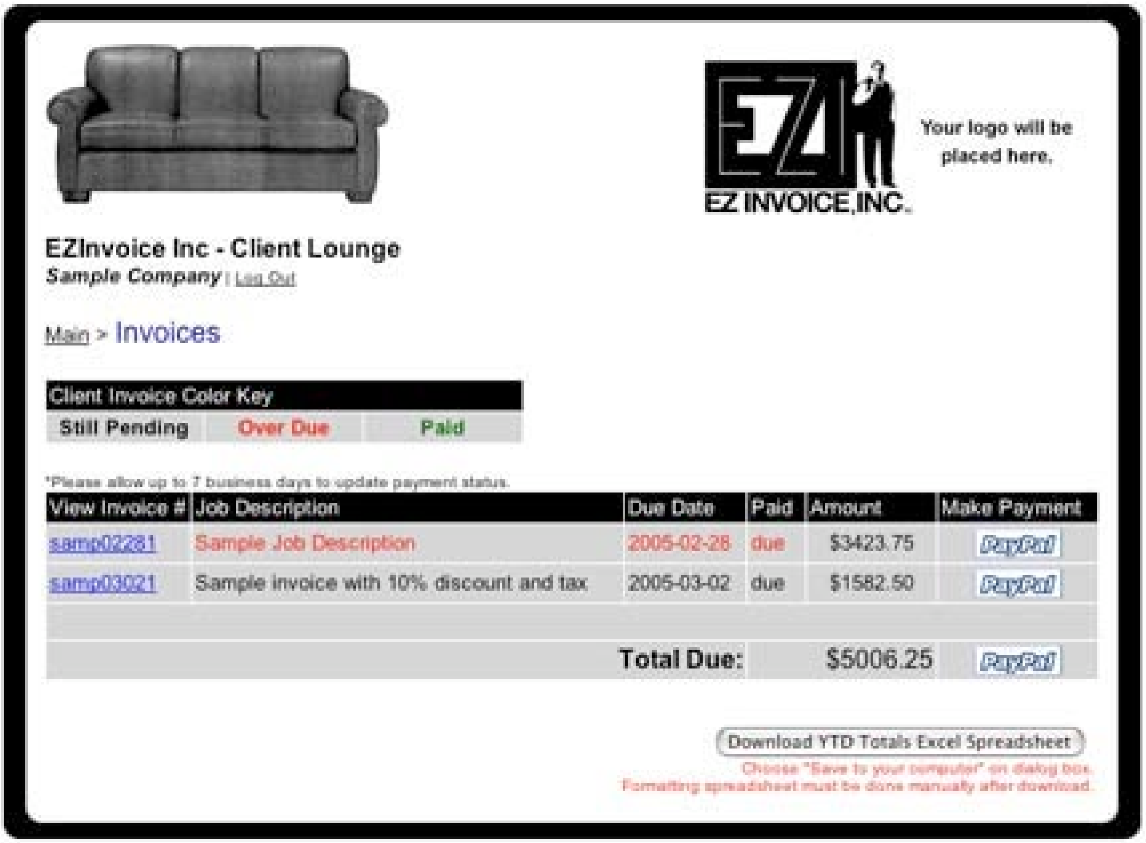
Invoice #	Company Name	Job Description	Amount
samp09232	Sample One EZI	Sample 2	$643.10
samp09271	Sample One EZI	Sample 3	$277.10

You can download this .xls file anytime of the year if you would like although it was created for backing up the end of the year taxes. You can easily email the .xls file to your accountant at the end of the year and they can take it from there!

Chapter 11 Client Lounge

The Client Lounge is only for your clients. Every invoice you create will automatically be transferred into your clients client lounge. You may view your clients "Client Lounge" by logging out as the Admin and re-logging in with one of your client's username and passwords. You can email your client their Client Log-in information anytime from the Manage Clients page if you would like your client to be able to use the lounge. Once your Client logs into the Client Lounge, they will see a page like this.

If your Client clicks on the View All Invoices link they will be taken to this page:



Here, your Client can click on the View Invoice# and either view the invoice as a PDF or an HTML Version. Both are printable and the PDF can be saved to there computer.

If your client would like to pay by using PayPal, they can click the Make Payment PayPal Button and they will be taken directly to the Paypal Payment Center on the internet along with the amount on the invoice.

If your client would prefer to pay by check, they can print out the pdf or html invoice, and mail the payment to the Ship To address on that invoice. If your client would like to know how much they have paid you at any time of the year, they can click on the Download YTD Totals Excel Spreadsheet button.

About "Download YTD Totals Excel Spreadsheet" in the Client Lounge:

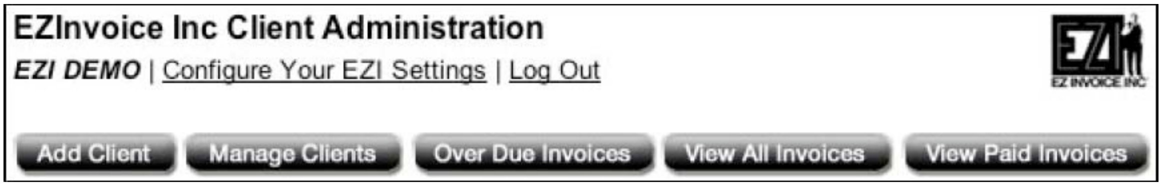
When you click on this button, your entire YTD invoices database (paid/unpaid) will be downloaded as an Excel Spreadsheet to your desktop. Choose Save File To Desktop. The file will be named "invoices"thedate".xls. From there, you can use the document in many different ways for your own purposes. Once

Note: If you would not like your client to have access to the Client Lounge anymore you will need edit this in the clients "manage clients" page and update their client info. You will need to change their email, username and password. (You can change this back at anytime) Or, if you do not need the client's info/invoices any longer just delete the client from the Manage Clients page by clicking on the delete button.

Chapter 12 Logging Out

Logging out is very important and will save you time in the long run. You should always log out after using your EZ Invoice, INC ™ software for security purposes. If you don't log out your EZ Invoice, INC ™ software will be easily accessible on your computer when left unattended. Please be aware of this. (Granny thinks if you don't get this with it bolded red, you have problems dude!)

Admin Log Out button:



Client Lounge Log Out Button:

Chapter 13 Year End Report

The Year End Report Button is located on the Main Page.

When you click the Year End Report button, this is the page you will see (below). When you click on the Download Excel Spreadsheet button, **EZ Invoice, INC** ™ will download a copy of ALL your invoices for the entire year.

WE STRONGLY RECOMMEND that after you download this spreadsheet to your computer, that you copy the file to a CD or 3.5" floppy disc etc..

Now on to the Year End Report page, select the Click Here To Clear all Unpaid Invoices button, and delete the past year's invoices. If you don't clear them, they will re-load with the newest year's invoices. If you do not mind having multiple years of invoices together, then you do not have to click the Clear All Paid Invoices button. Only the paid invoices will be deleted from the database. If you have pending invoices from the year before they will be added to the new year.

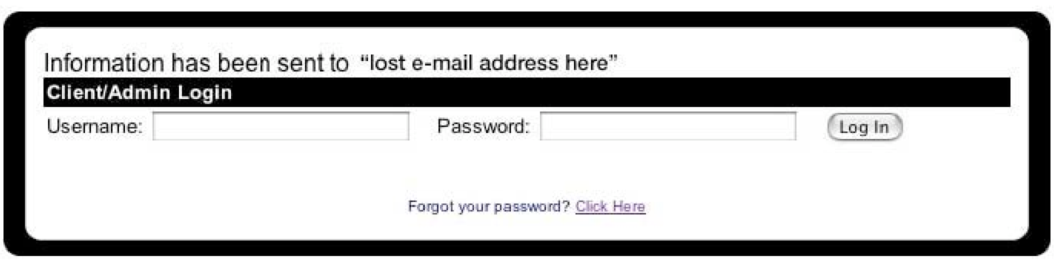
Please note: Once you click the clear all paid invoices button all that data will be deleted **forever.** That's why its important to back up the Year End Report xls spreadsheet just in case. Your clients will not be able to access this information anymore as well!

Chapter 14 Forgot Your Password? Click Here

This is only for your client's use. Clients can click the Forgot Your Password? Click Here button if they want to log in but they have forgotten their username or password. It will be emailed to them. (Remember to write down **Your Own Admin**username and password in a safe place for future reference)

By clicking the Click Here button your client will be taken to the Forgot Your Password page.

After your client enters his email address and clicks the "Get Password" button, the username and email info is automatically emailed them and the image below appears.



The client now needs to go check their email and recover their username and password. They can now log-in to the Client Lounge with the username and password that was emailed to them.

If you have further questions please take a look at our FAQ page via www.ezinvoiceinc.com.