



User Guide

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1: vO Invoice Overview

www.vOInvoice.com is one of the lowest cost invoicing solutions available on the web. All new members receive a full 1-year free trial. After the 1-year period is over you pay just \$59 per year. There is no limit to how many invoices you can create and send using this system. Your data can be exported to Intuit QuickBooks or Microsoft Excel so there is no risk in trying us!

Maintain your company brand

vO Invoice lets you customize the look and feel of the actual invoice form. You can enter your own terms, payment instructions, and even upload a company logo!

1-click to Fax or Email the Invoice

When you add a new client into the system you are asked to provide a fax # or email address. Whenever you invoice that client, all it takes is one click to send a copy of the invoice to their fax machine or to their email as a PDF.

Accept Electronic Payments

Your vO Invoice account can integrate with a compatible merchant account to allow for electronic and credit card payments. Payments made electronically are automatically tracked against their respective invoices. This means there is no need to spend valuable time figuring out which payments are pending.

Recurring Invoices

Recurring invoices are useful when you bill your client for the same items over a determined period of time. They can also be used to help manage a payment plan. vO Invoice will automatically email or fax the new invoice at the start of each billing cycle.

Accept Partial Payments

vO Invoice allows you the option of accepting partial payments for an invoice. The system provides a detailed history of all payments and can ensure you have an accurate picture of your pending receivables.

Immediate Invoice Access for your Clients

Each delivered invoice comes with a special code #. Your client can visit vOInvoice.com to download and print the latest copy of their invoice. The client can also check to see their payment status.

Employee Access (Permission Based)

As the primary vO Invoice account holder, you can control who has access to your firm's invoicing. Simply enter the email address of your employee and the permissions you want them to have and vO Invoice will send them a secure access link via email.

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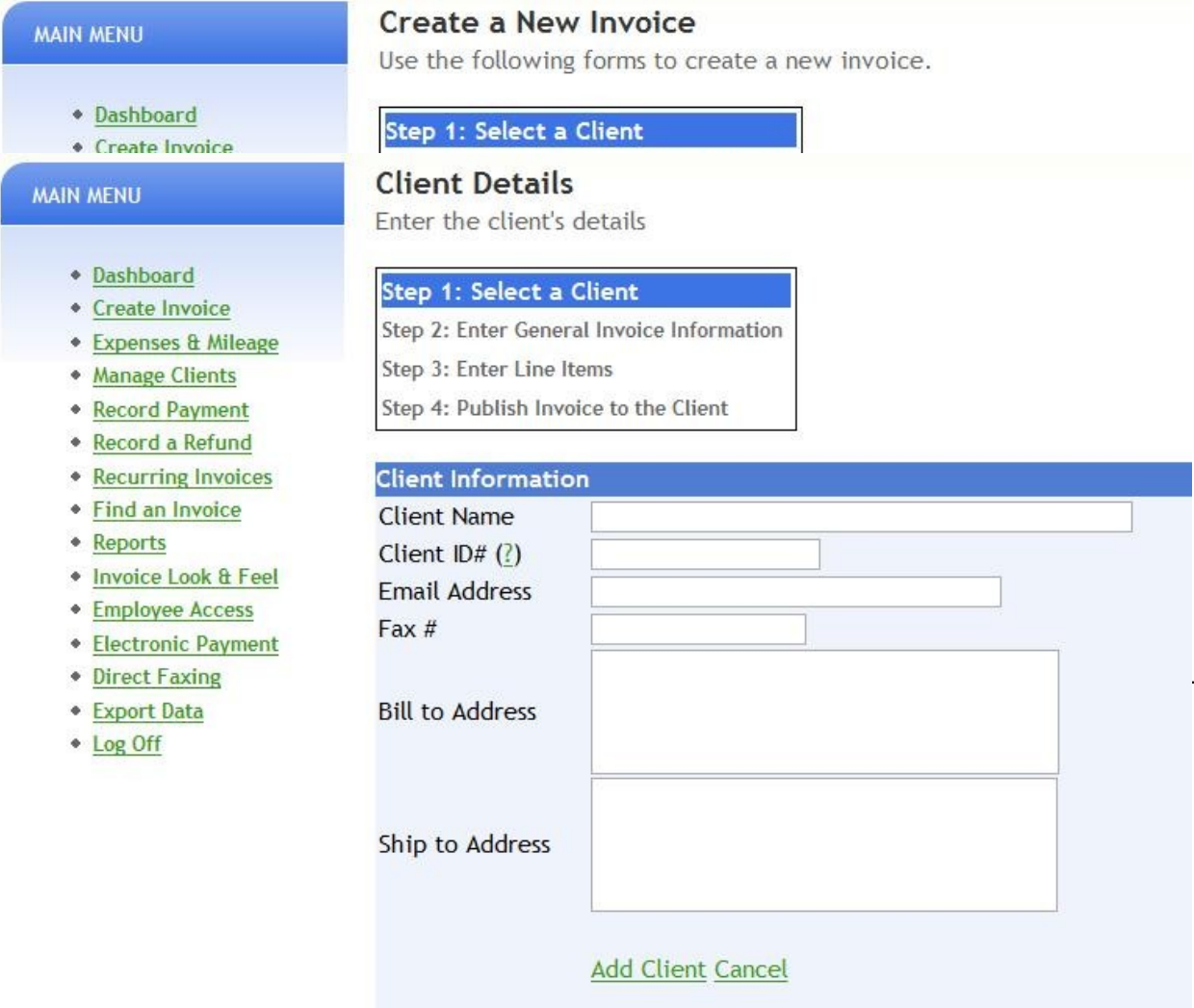
2: Step-by-Step Procedures

2.1: Sign up

Step #	Action
1.	<p>To begin. Click go to www.voinvoice.com/SignUp.aspx, or click "FREE Signup!" at the top navigation menu.</p> <p>Step 1: Fill in the required basic information (name, email and password).</p> <p>Step 2: Fill in the the following information pertaining to your organization (Company name, Default tax rate, first invoice #, customer service address, and billing address (note that this step is optional).</p> <p>Step 3: Click the "Begin Invoicing" button to continue.</p>

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2.2: Creating an Invoice

Step #	Action
1.	<p>After logging into vOInvoice, click “Create Invoice” on the left navigation bar. This this is my first time creating an invoice, it will be for a new client. Click “Invoice a new client”. If you already have a client, move to step #3 in this user guide.</p> 
2.	<p>Enter your client information on this page. Mandatory fields include name and email address. Click “Add Client” when you are finished.</p>
3.	<p>Enter the general invoice information in this section. The required field is the invoice title. Click “Next (Add Line Items)” when you are finished.</p>

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Step 1: Select a Client
Step 2: Enter General Invoice Information
 Step 3: Enter Line Items
 Step 4: Publish Invoice to the Client

Invoice Details

Invoice # <will be generated>

Invoice Title

Bill To

Bill to Address

Ship to

Ship to Address

Payment Due Date

Other Information (?)

Accept Partial Payments (?)

[Next \(Add Line Items\)](#) [Cancel](#)

4. In this section you have the ability to add line items to your invoice. Specify the name and cost of each line item. When finished, click “Finished adding items”.

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Invoice Line Items
 Add / Remove / Edit the Line Items of the Invoice

Step 1: Select a Client
 Step 2: Enter General Invoice Information
Step 3: Enter Line Items
 Step 4: Publish Invoice to the Client

Add Line Items

Item	Description	Quantity	Unit Price	Tax Rate	Total
Graphic Design	3 logos for website	1	300.00	0.000	\$300.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.000	\$0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.000	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.000	

Bill for a Service (?) \$

[Clear all](#) | [Add More Items](#) | [Finished adding Items](#)

[This Invoice has no Line Items]

*Total includes all taxes

6. Review the items in your invoice. When you are satisfied click “Publish this Invoice”.

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Preview the Invoice

Take a look to make sure everything looks good.

- Step 1: Select a Client
 - Step 2: Enter General Invoice Information
 - Step 3: Enter Line Items
 - Step 4: Publish Invoice to the Client

Take a look at the invoice below.

When you are ready click to [\[Make Changes\]](#) or [\[Publish this Invoice\]](#)



INVOICE #1000

Invoice Date: 12/6/2007

Bill To: Glifton Gunderson

Ship To: Glifton Gunderson

Invoice for Web Services

Line Items

#	Item	Description	Qty	Unit \$
1	Graphic Design	3 logos for website	1	\$300.00

Bill Payment Instructions

555 Northwood Street

J & G Locksmithing

Sub Total \$300.00

Tax \$0.00

Total \$300.00

Due 1/5/2008

Download this invoice online at <http://www.voInvoice.com>
Enter Invoice #1000 and Code #1091621029

7. Your invoice has been created but not yet sent. Click "Send Email" to send this invoice to your client. You can also Fax this invoice to your client by typing in their fax number and clicking "Send Fax".

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Invoice Distribution Options - [Download Invoice as PDF](#)

Send via Email to [Send Email](#)

Send via Fax to (enter 10-digit phone number ie 8663512123) [Send Fax](#)

[Back to the Dashboard](#)

THIS INVOICE IS CURRENTLY OPEN

Invoice Options [Modify Invoice](#) | [Revoke Invoice](#) | [Record Payment](#) | [Record Refund](#)

Some features may be disabled based on your permissions.
Please contact Joe to have your permissions changed.

INVOICE #1000

Invoice Date: 12/6/2007

Bill To: Glifton Gunderson Ship To: Glifton Gunderson

Invoice for Web Services

Line Items

#	Item	Description	Qty	Unit \$
1	Graphic Design	3 logos for website	1	\$300.00

Bill Payment Instructions

555 Northwood Street

J & G Locksmithing

Sub Total \$300.00

Tax \$0.00

Total \$300.00

Due 1/5/2008

Download this invoice online at <http://www.voInvoice.com>
Enter Invoice #1000 and Code #1091621029

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2.3: Record a non-electronic payment

Step #	Action
1.	Click "Record Payment" on the left navigation tab.
2.	Click "Open" on your desired Invoice
3.	Enter the amount of money you received for this invoice next to "Amount Received". Select from the drop down list the method of payment: Cash, Check, Money Order and Other. Click "Record" when you are finished.

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Mark Payment

Payment	Existing Payment(s)
Record a New Payment	
Amount Received	\$ <input type="text" value="300.00"/>
Received on	<input type="text" value="12/6/2007"/> (mm/dd/yyyy)
Payment Method	<input type="text" value="Check"/> ▼
Reference Info (?)	<input type="text"/>
Record Cancel	

[No payments have been recorded for this invoice]

THIS INVOICE IS CURRENTLY OPEN

INVOICE #1000

Invoice Date: 12/6/2007

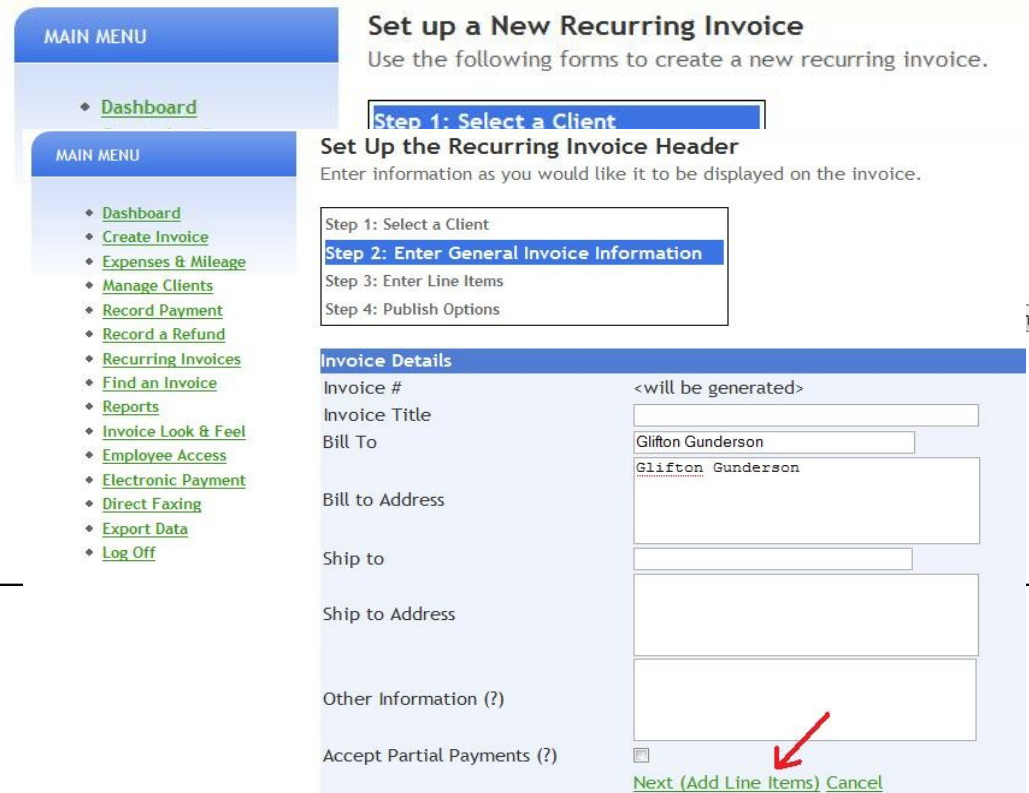
Bill To: Glifton Gunderson	Ship To: Glifton Gunderson
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Invoice for Web Services

Line Items				
#	Item	Description	Qty	Unit \$
1	Graphic Design	3 logos for website	1	\$300.00

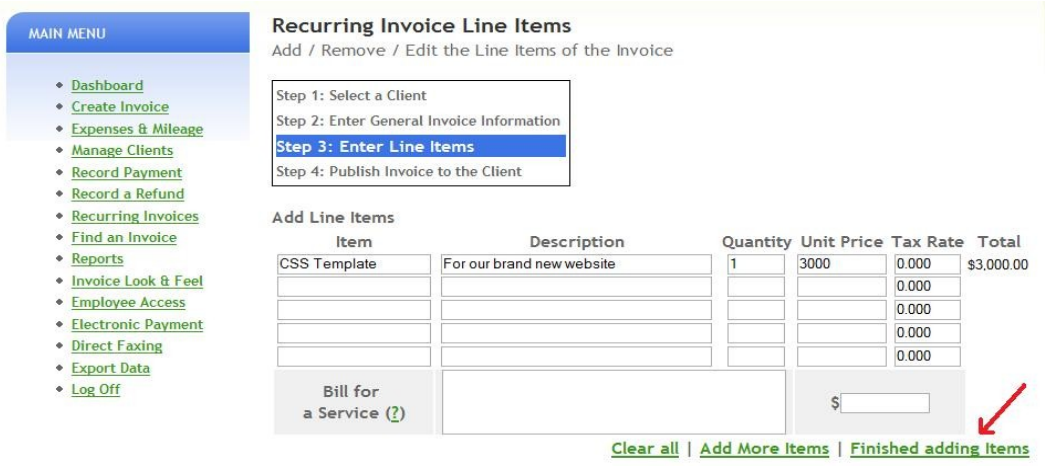
Bill Payment Instructions	
555 Northwood Street	Sub Total \$300.00
	Tax \$0.00
	Total \$300.00

2.4: Recurring Invoices

Step #	Action
1	Click "Recurring Invoices" on the left navigation tab. If this is your first recurring invoice, click "Start a new Recurring Invoice".
2	<p>Since I am creating this Invoice for an existing client, I will click "Select". If you do not have any clients, or wish to stat a new one, refer to section 2.2 of this use guide.</p> 
3	<p>Enter general invoice information here. Invoice name is a required field. Click "Next (Add Line Items)" when you are finished.</p>

2.4: Recurring Invoices

Step #	Action
4	Enter the invoice line items here. Required fields are name and price. Click "Finished Adding Items" when you are finished.



Recurring Invoice Line Items
Add / Remove / Edit the Line Items of the Invoice

Step 1: Select a Client
Step 2: Enter General Invoice Information
Step 3: Enter Line Items
Step 4: Publish Invoice to the Client

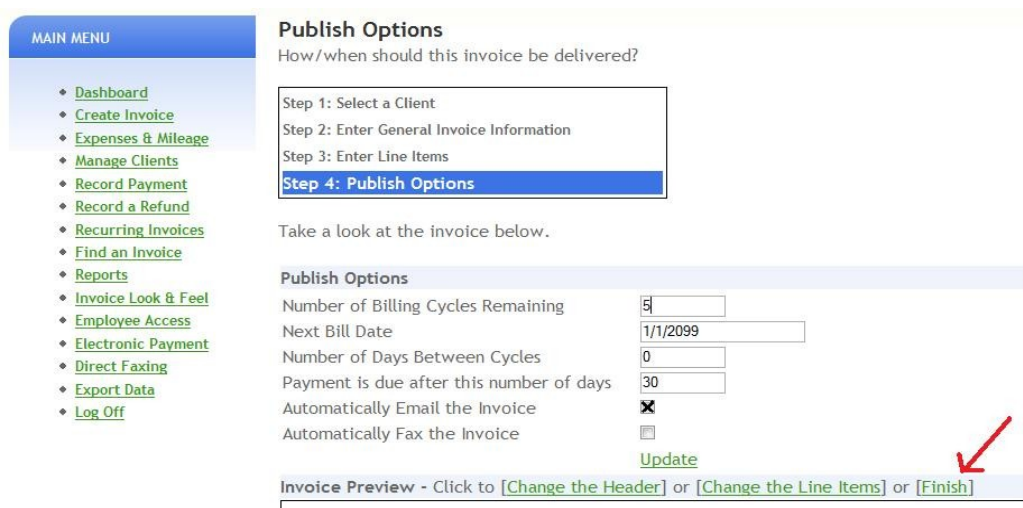
Item	Description	Quantity	Unit Price	Tax Rate	Total
CSS Template	For our brand new website	1	3000	0.000	\$3,000.00
				0.000	
				0.000	
				0.000	
				0.000	

Bill for a Service (?)

Clear all | Add More Items | Finished adding Items

2.4: Recurring Invoices

Step #	Action
5	<p>This page allows you to set the setting for your recurring invoice.</p> <ul style="list-style-type: none"> Number of Billing Cycles remaining tells the system how many times to send this invoice during its lifetime. Next Bill Date tells the system the first time to use this recurring invoice. Number of Days between cycles tells the system if there should be a delay between cycles. Check either “Automatically Fax the Invoice” or “Automatically Email the Invoice” if you want the system to automate the transmission of your invoice. <p>Click “Finish” when you are done.</p>



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Publish Options

How/when should this invoice be delivered?

Step 1: Select a Client
 Step 2: Enter General Invoice Information
 Step 3: Enter Line Items
Step 4: Publish Options

Take a look at the invoice below.

Publish Options

Number of Billing Cycles Remaining	<input type="text" value="5"/>
Next Bill Date	<input type="text" value="1/1/2099"/>
Number of Days Between Cycles	<input type="text" value="0"/>
Payment is due after this number of days	<input type="text" value="30"/>
Automatically Email the Invoice	<input checked="" type="checkbox"/>
Automatically Fax the Invoice	<input type="checkbox"/>

[Update](#)

Invoice Preview - Click to [Change the Header](#) or [Change the Line Items](#) or [Finish](#)



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