Tech-Tonics Inventory and Customer Management System User Manual

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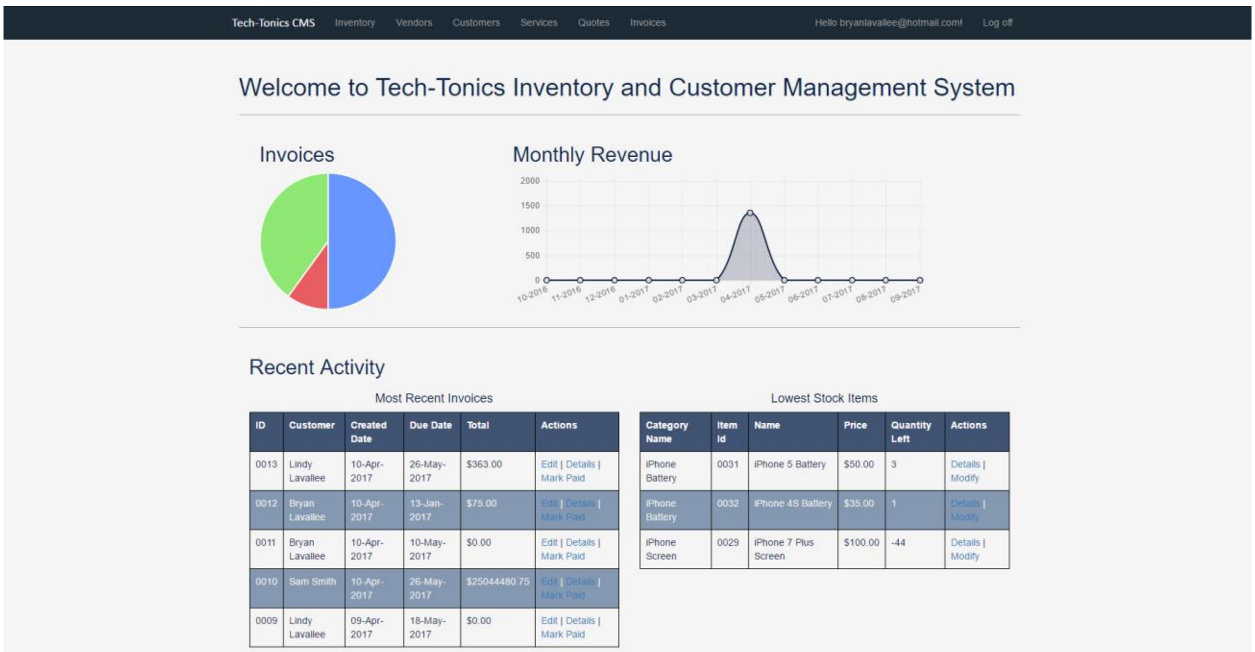
Starting Out

The first step for using this system, is that you need to log in. This is to ensure that the user will be authenticated and have access to the corresponding parts of the system. To create an account, all the user will need to do is register as a new user and follow the instructions. After the account is created you will have access to the system. If the user selects remember me, the system will automatically log you in every time you access it.

Home Screen/Dashboard

View:



Overview

After the user logs into the system, it will redirect to the home screen/dashboard. On the dashboard, there are multiple tables and charts with relevant information to give the user a quick insight into their earnings and/or inventory. The charts are for invoices and monthly revenue.

The pie chart shows all non-archived invoices, and is colour coded to represent either due invoices(blue), overdue invoices(red) and paid invoices(green). If the user hovers his mouse over a section of the pie chart, it will display how many invoices are relevant to that section.

The line chart shows monthly revenue. The chart automatically updates once an invoice is paid. This allows the user to see how much money they have been making in the current month, and can compare it to last month. Depending on if the client still wants, after a year we will update it so it shows previous years' information.

The dashboard also consists of two tables which show the five most created invoices, and the items which have the lowest stock (table will show five items if applicable). For invoices, this allows the user to see who has received the latest invoice, and whether he can mark paid. The link will take the user to the corresponding page depending on his selection. For low stock items, it will show the items which quantity remaining is less than 5. This allows the user to see which items he needs to restock and which ones can wait just a little longer.

Customer Subsection

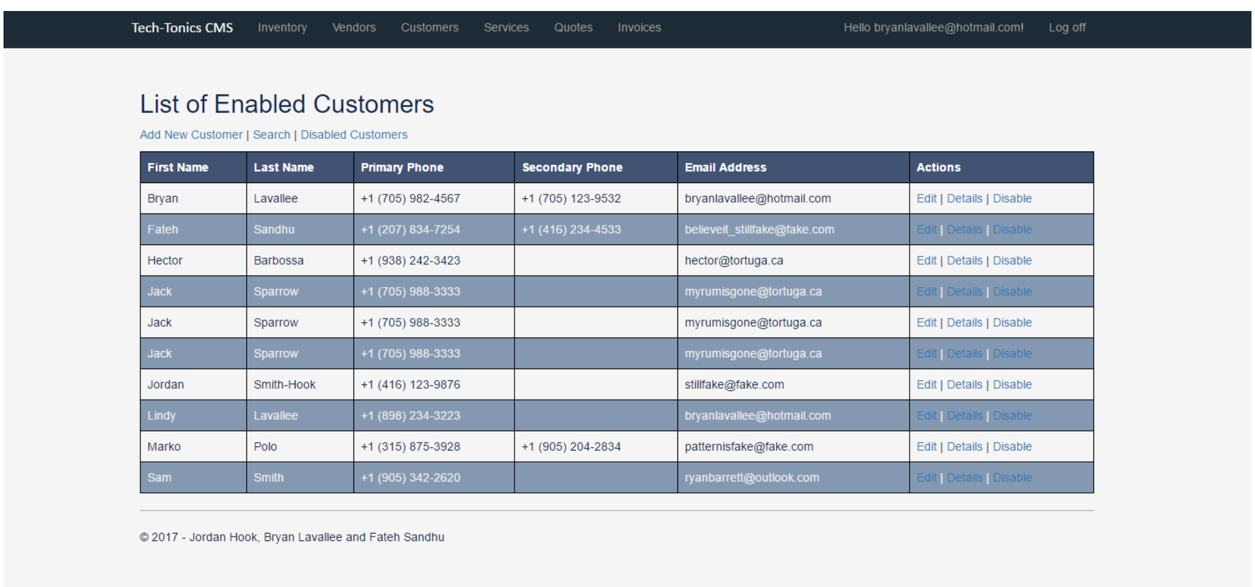
Client Specifications for Customer

- Client requested that address country automatically be set to Canada and address province be set to Ontario in the creation form, and the edition form.
- That customers with the same name can be created. Just show a warning that the user is creating customer which may already exist. *This does not stop him from creating the customer.*
- That the postal code form field also allow zip codes.
- Any invoices that are related to a customer, be displayed in the details page for that customer.

Overview

The customer subsection of the system allows the user to track the customers that have been created and/or issued an invoice to. The customer system breaks down into five main components: creating a customer, editing a customer, searching customers, disabling a customer and enabling a customer. The customer section of the system is reached by selecting customers from the navigation bar.

Index View:

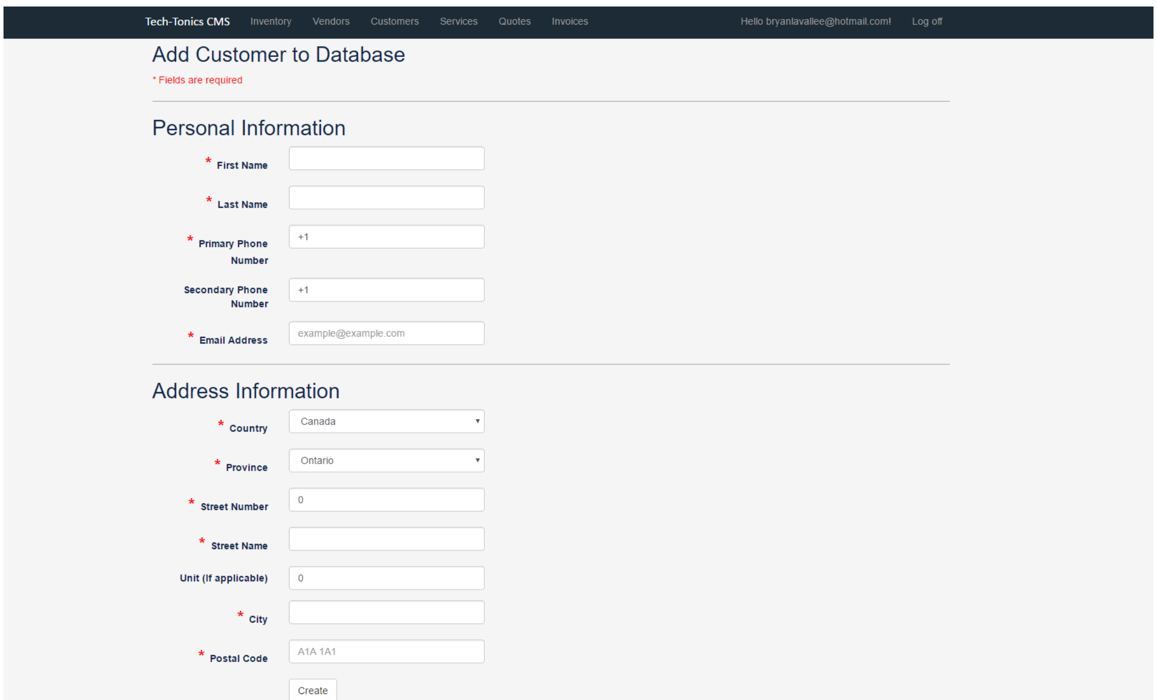


First Name	Last Name	Primary Phone	Secondary Phone	Email Address	Actions
Bryan	Lavallee	+1 (705) 982-4567	+1 (705) 123-9532	bryanlavallee@hotmail.com	Edit | Details | Disable
Fateh	Sandhu	+1 (207) 834-7254	+1 (416) 234-4533	believeit_stillfake@fake.com	Edit | Details | Disable
Hector	Barbossa	+1 (938) 242-3423		hector@tortuga.ca	Edit | Details | Disable
Jack	Sparrow	+1 (705) 988-3333		myrumisgone@tortuga.ca	Edit | Details | Disable
Jack	Sparrow	+1 (705) 988-3333		myrumisgone@tortuga.ca	Edit | Details | Disable
Jack	Sparrow	+1 (705) 988-3333		myrumisgone@tortuga.ca	Edit | Details | Disable
Jordan	Smith-Hook	+1 (416) 123-9876		stillfake@fake.com	Edit | Details | Disable
Lindy	Lavallee	+1 (898) 234-3223		bryanlavallee@hotmail.com	Edit | Details | Disable
Marko	Polo	+1 (315) 875-3928	+1 (905) 204-2834	patternisfake@fake.com	Edit | Details | Disable
Sam	Smith	+1 (905) 342-2620		ryanbarrett@outlook.com	Edit | Details | Disable

Customer Creation

To create a customer, the user will select the create new link on the index page for customers. This will take the user to a form in which they will need to fill out all necessary information. If all information is valid, the system will create the new customer and redirect the user to a detail page which shows all information about the created customer. Customer makes use of an address object, which on creation of customer, an address object is created and assigned to that customer. This is all done in the background of the system, and the user simply needs to input appropriate information.

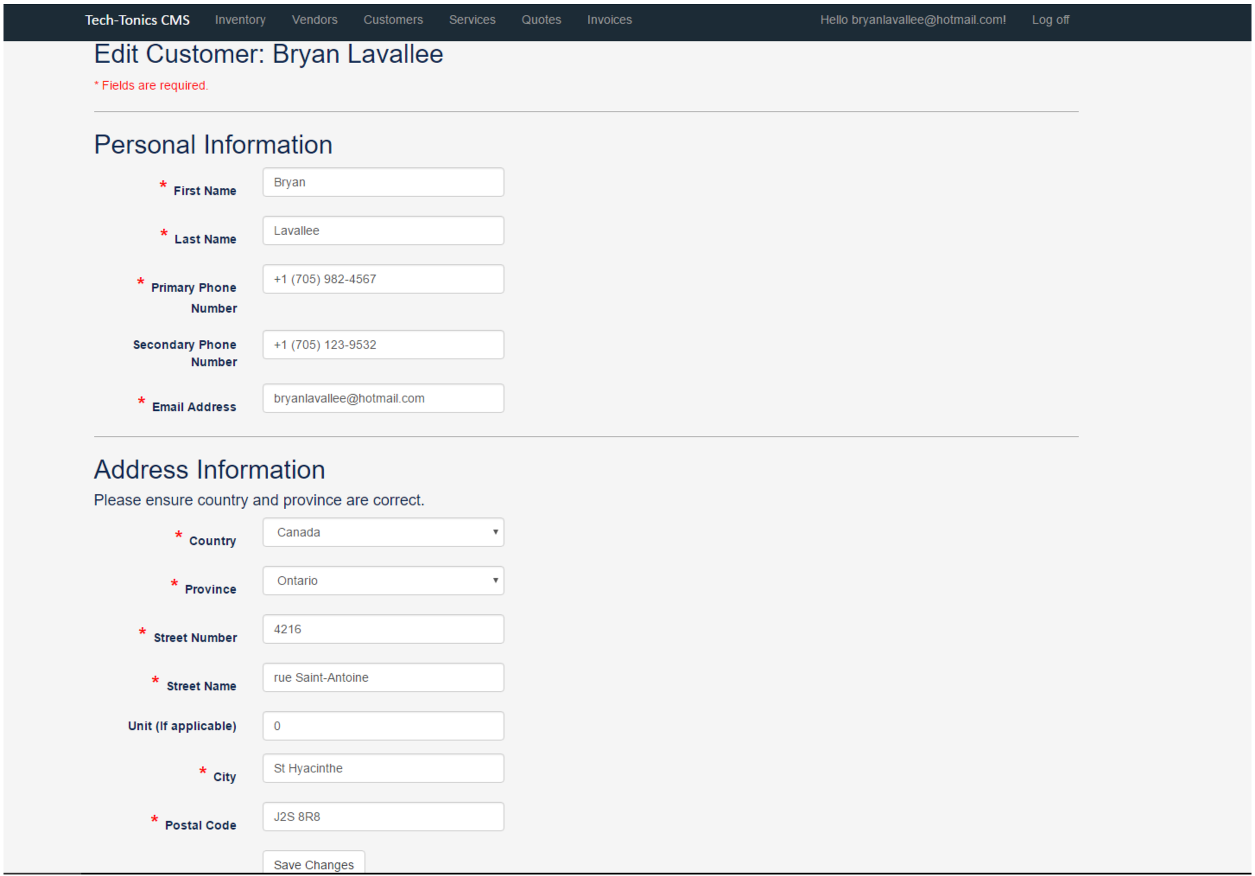
Customer Create View:



Customer Editing

To edit a customer, the user will select the customer that they wish to edit. They will then be redirected to a view which allows editing, and all previous information will be shown. *Please note, due to client specifications, the country and province drop down menu automatically select Canada and Ontario. Previous country and province information will always change.* After the user is finished editing, they can submit the form, and if information is valid it will be saved to the database. The user will then be redirected to a view with details about that associated customer. At any time, the user can cancel, and no information will be saved to the database.

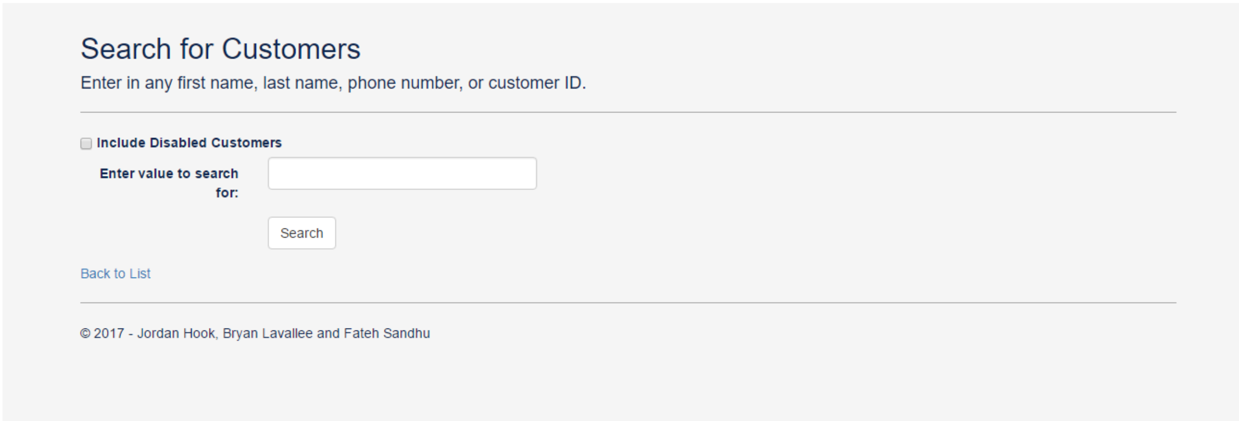
Customer Edit View:



Customer Searching

To search for a customer, the user will select the search customer link that is on the index page. This will take them to a form in which they can enter values for the system to search for. The system will search all customers to check if they contain the search values in any customer first name, last name, phone number and/or secondary phone number. If no matches are found, it will tell the user that, and will state for the user to try again. If matches were found, the information for that customer will be displayed in a table format that matches index view. Users can enter multiple search values but they **must be separated by a comma.**

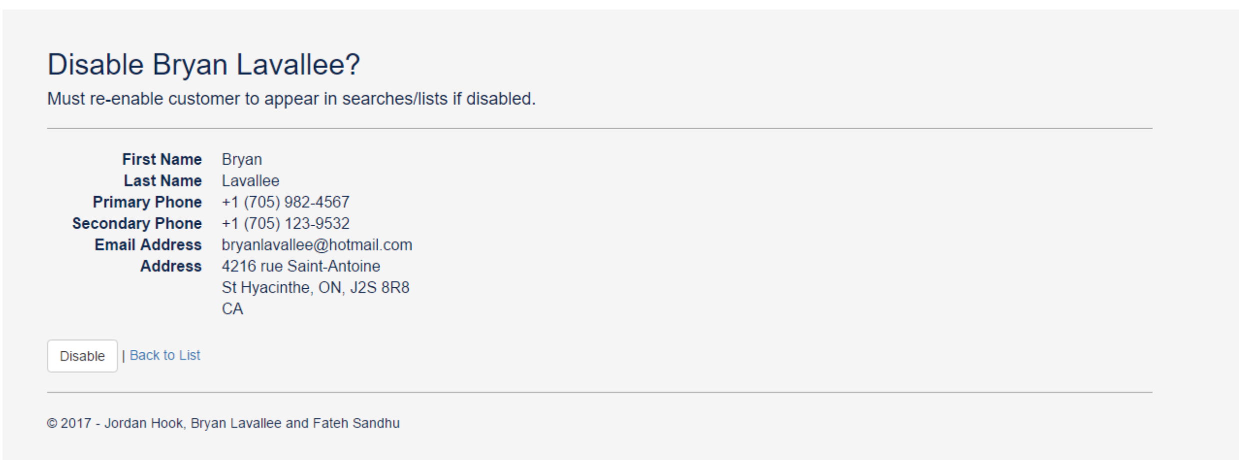
Customer Search View:



Customer Disabling

To disable a customer, the user will click the link in the index table, and this will take them to a confirmation page. Disabled customers will not appear in searches unless otherwise specified, and invoices cannot be created for disabled customers. If the user selects the disable button, the system will mark that customer disabled, and the database will save these changes. The user will then be sent back to the index page.

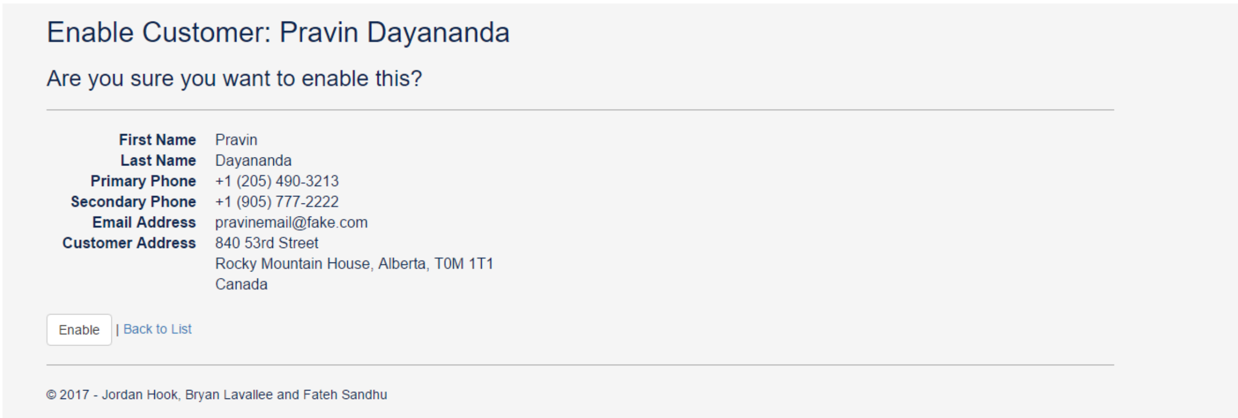
Customer Disable View:



Customer Enabling

To enable a customer, the user will click the link which states "Disabled Customers", which will take the user to a new index page. This page shows all disabled customers, and gives the option to enable the customer. When the user selects the enable link, it will take the user to a confirmation page where the user can select enable. This will mark the customer not-disabled and the database will save the changes. Now the customer can be used for creating invoices, and will be returned in search results all the time.

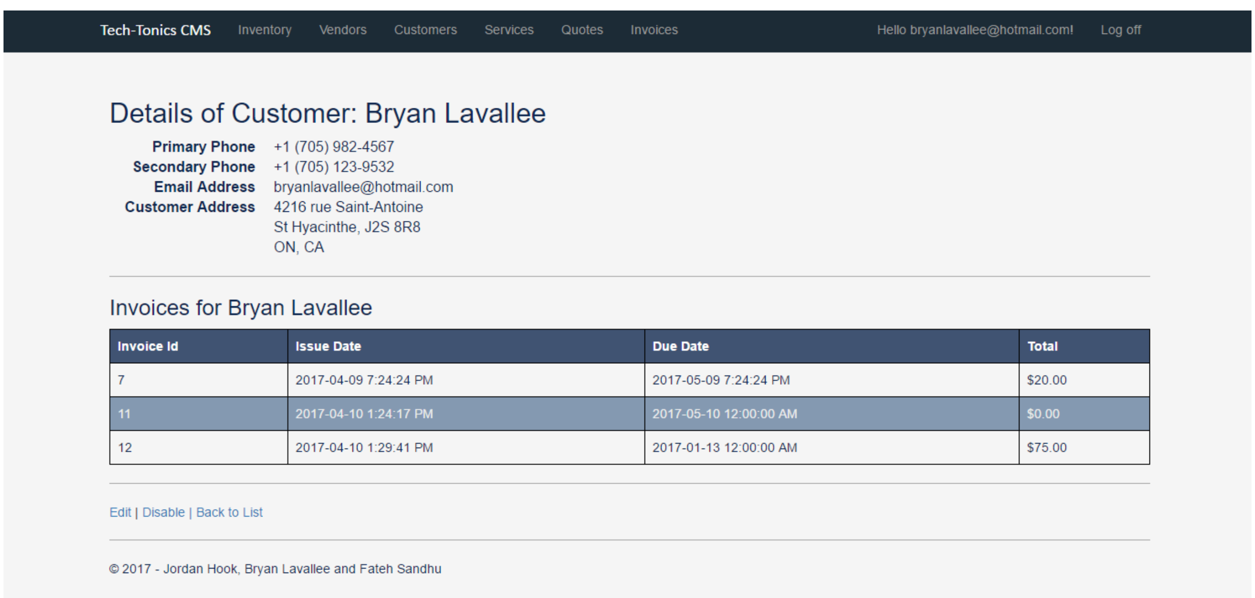
Customer Enable View:



Customer Interactions with Invoices

Customers interact with invoices by when a user creates an invoice, the invoice needs a customer. The user will select the customer from a drop-down list and that invoice will be created for that customer. This is seen by going into the customer details page, by clicking the details link on the customer index page. All associated invoices are shown at the bottom in table format. Customers are also used when converting a quote to an invoice.

Customer Details View:



Inventory Subsection

Client Specifications for Inventory

- No specifications were discussed.

Overview

The inventory subsection of the system allows the user to track the items which he supplies for repairing phones and/or computers. The inventory system breaks down into four main components: creating a new item, editing an existing item, and searching for an item.

Item Index Page:


Inventory

Category List | Create New

Search For Item

Category	Id	Model number	Name	Description	Price	Quantity	Reserved Quantity	Vendor	
iPhone Screen	0030	N/A	iPhone 6 Screen	iPhone 6 replacement screens. 4.7 Inches only compatible with the regual size phones.	$75.00	9	4	N/A	Details | Modify
Android Screen	0033	1968A18CS4	Mega-Pixel 2701	awesome screen with brilliant-coloured, rainbow shaped dots	$0.45	7	0	One Stop Cell Phone Repair Store	Details | Modify
iPhone Battery	0031	N/A	iPhone 5 Battery	OEM replacement batteries for iPhone 5.	$50.00	3	0	N/A	Details | Modify
iPhone Battery	0032	N/A	iPhone 4S Battery	OEM replacement batteries for iPhone 4S.	$35.00	1	0	N/A	Details | Modify
iPhone Screen	0029	N/A	iPhone 7 Plus Screen	iPhone replacement screens. 5.5 Inches only compatible with the plus edition.	$100.00	-44	3	N/A	Details | Modify

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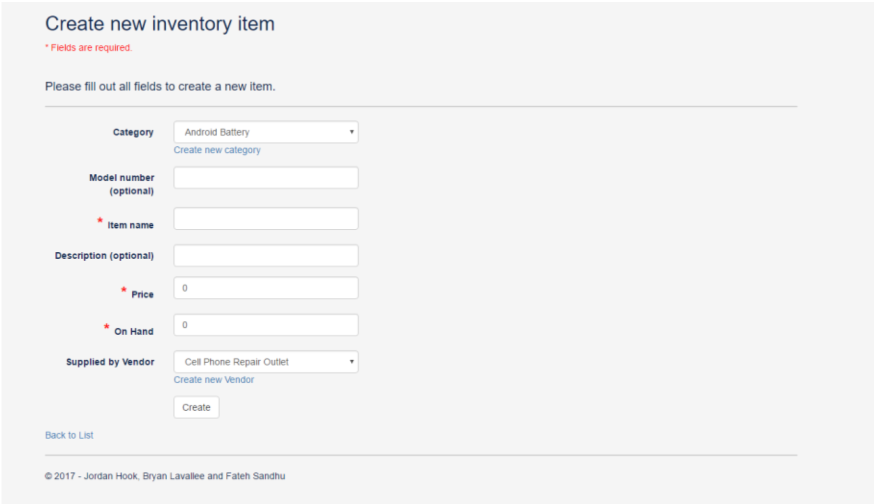
Item Creation

To create an item, all the user needs to do is go to the main index page for the inventory subsection, which is done by selecting inventory from the navigation bar. From here, they select create new which will take them to a form in which they need to fill out. All required fields are marked with a red asterisk and if they do not complete one of these fields, the form will not submit. If all information is valid, the form will be sent and the user will be directed to a detail view that shows all the information about the newly created item.

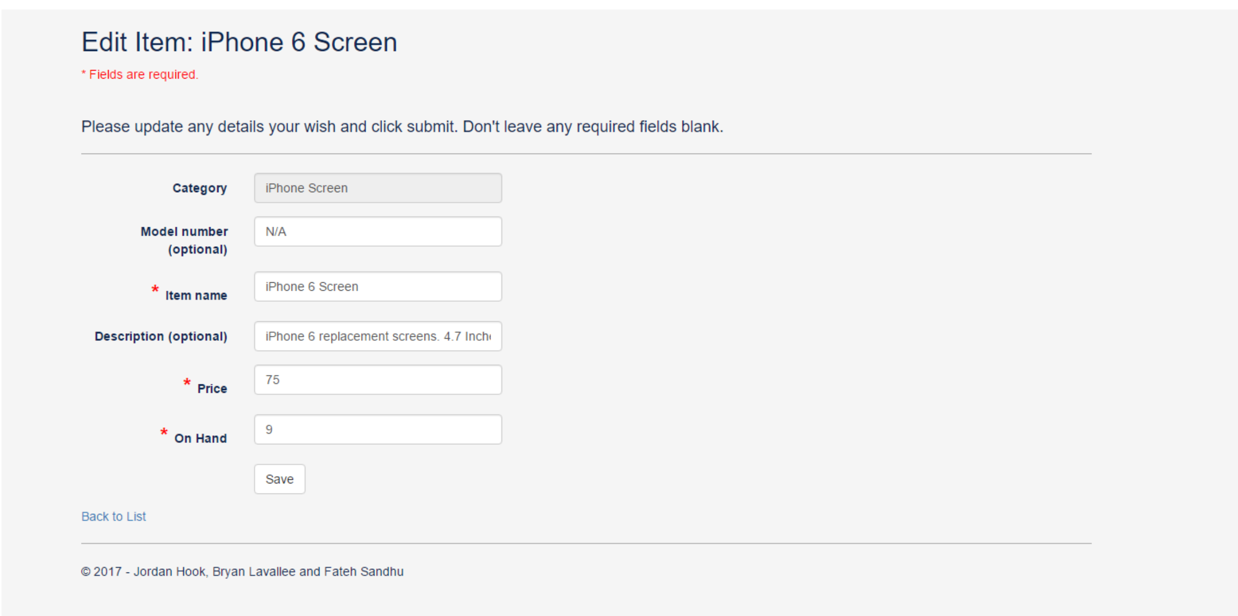
Item Create Page:



Item Editing

To edit an existing item, from the index page, the user will select the modify link that takes them to a new page. This new page has all the previous information for the selected item, and the user can change values as he/she pleases. *Please note that the user will not be able to update the category, because of how the items are created.* After the user is finished, he will need to click the save changes button which will save the new information to the database. This form also has validation, so if a value is not valid, it will not be sent until the user fixes the issue. At any time in the process before selecting save changes button, the user can cancel and no information will be altered.

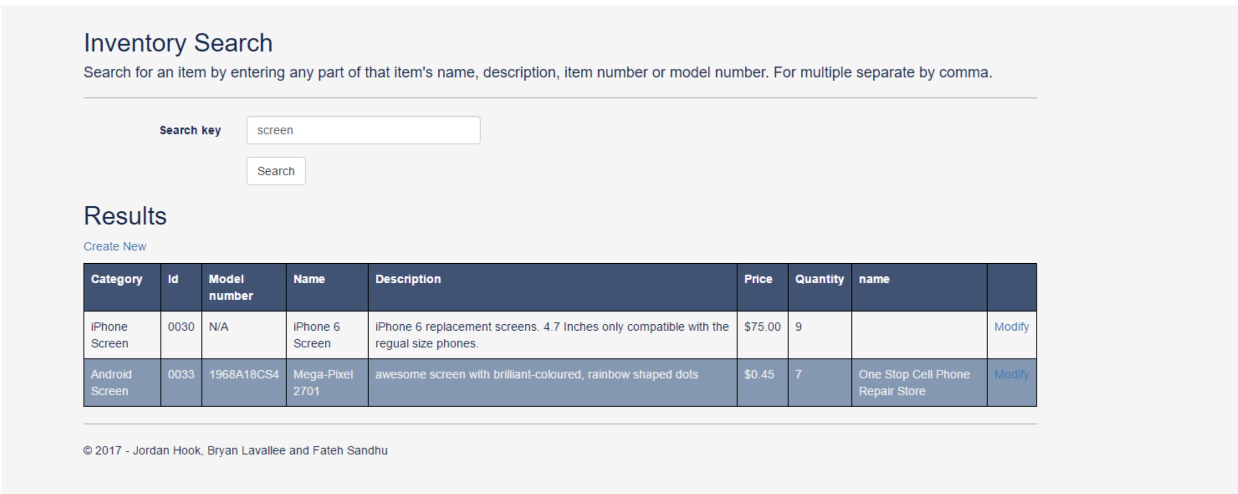
Item Edit Page:



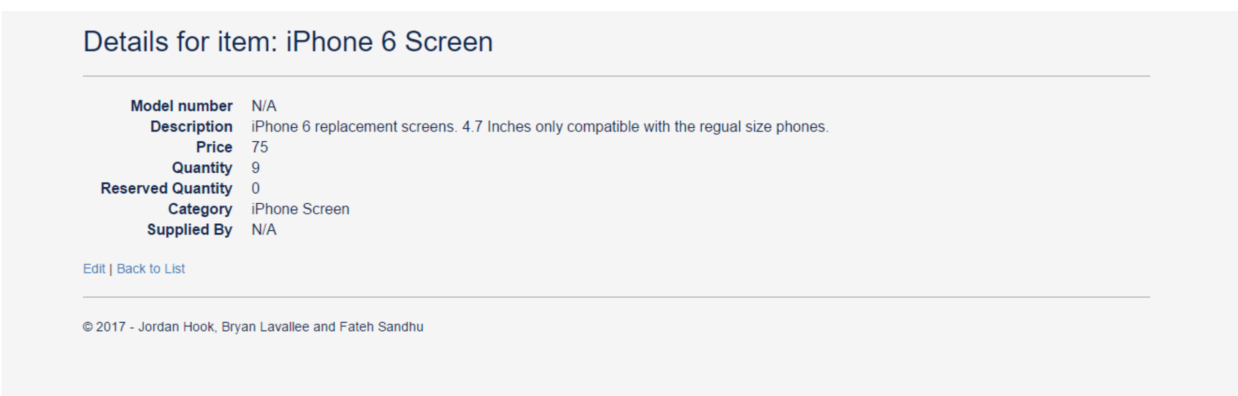
Item Searching

To search for an item, the user will need to click the link on the index page which is placed above the table on the right side. The link will take them to a search form, which has a field which accepts a value to search for. For items, the system will search all items and check to see if the item contains the search value in the items name, description, model number and item number. If the search is successful, it will load a partial view which contains a table displaying the results. If no information is found, it will display that the request was not successful and that no information was found. Users can enter multiple search values but they **must be separated by a comma.**

Item Search Page:



Item Details Page:



Vendor Subsection

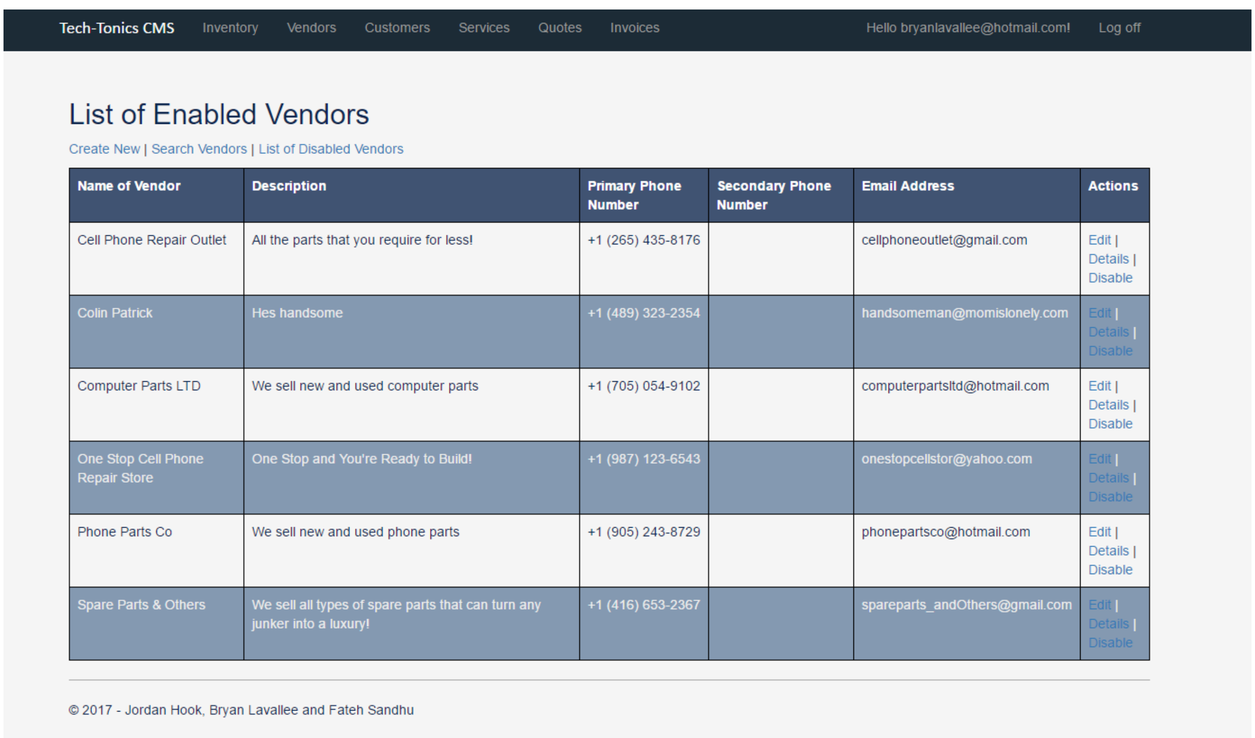
Client Specifications for Vendor Subsection

- Items are added to vendor from the item subsection.
- Can be multiple vendors with same name. Address may be different.
- No automatic ordering. Client will order items when he wishes.
- Client requested that address country automatically be set to Canada and address province be set to Ontario in the creation form, and the edition form.
- That the postal code form field also allow zip codes.

Overview

The vendor subsection allows the user to manage their current vendors and can make changes to existing, add new vendors, enable, disable and search vendors. Vendors are created to allow the user to see where he can get an item, and which vendor supplies what items. The vendor subsection does not do automatic ordering for items. The vendor section of the system is reached by selecting vendors from the navigation bar.

Vendor Index Page:

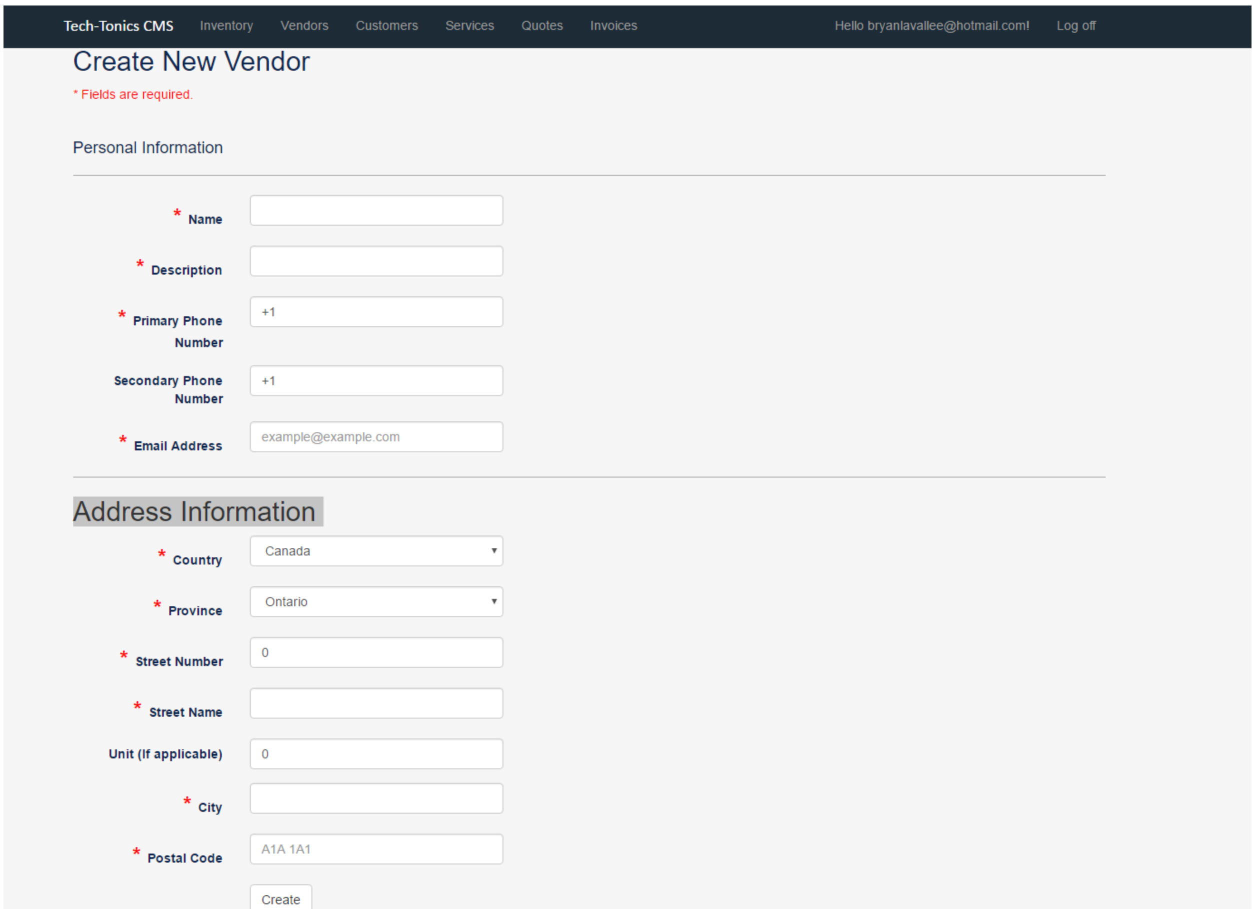


Name of Vendor	Description	Primary Phone Number	Secondary Phone Number	Email Address	Actions
Cell Phone Repair Outlet	All the parts that you require for less!	+1 (265) 435-8176		cellphoneoutlet@gmail.com	Edit | Details | Disable
Colin Patrick	Hes handsome	+1 (489) 323-2354		handsomeman@momislonely.com	Edit | Details | Disable
Computer Parts LTD	We sell new and used computer parts	+1 (705) 054-9102		computerpartsltd@hotmail.com	Edit | Details | Disable
One Stop Cell Phone Repair Store	One Stop and You're Ready to Build!	+1 (987) 123-6543		onestopcellstor@yahoo.com	Edit | Details | Disable
Phone Parts Co	We sell new and used phone parts	+1 (905) 243-8729		phonepartsco@hotmail.com	Edit | Details | Disable
Spare Parts & Others	We sell all types of spare parts that can turn any junker into a luxury!	+1 (416) 653-2367		spareparts_andOthers@gmail.com	Edit | Details | Disable

Vendor Creation

To create a vendor, the user must select the create new link on the vendor index page. This will send the user to a form where they must enter valid information. After they enter in the information for the vendor which they want to create, they must select the create button. Upon validation, it will send the user to details view about the newly created vendor. *Please note that you do not add items to vendor in this form. You select the vendor that supplies the item from the item subsection.*

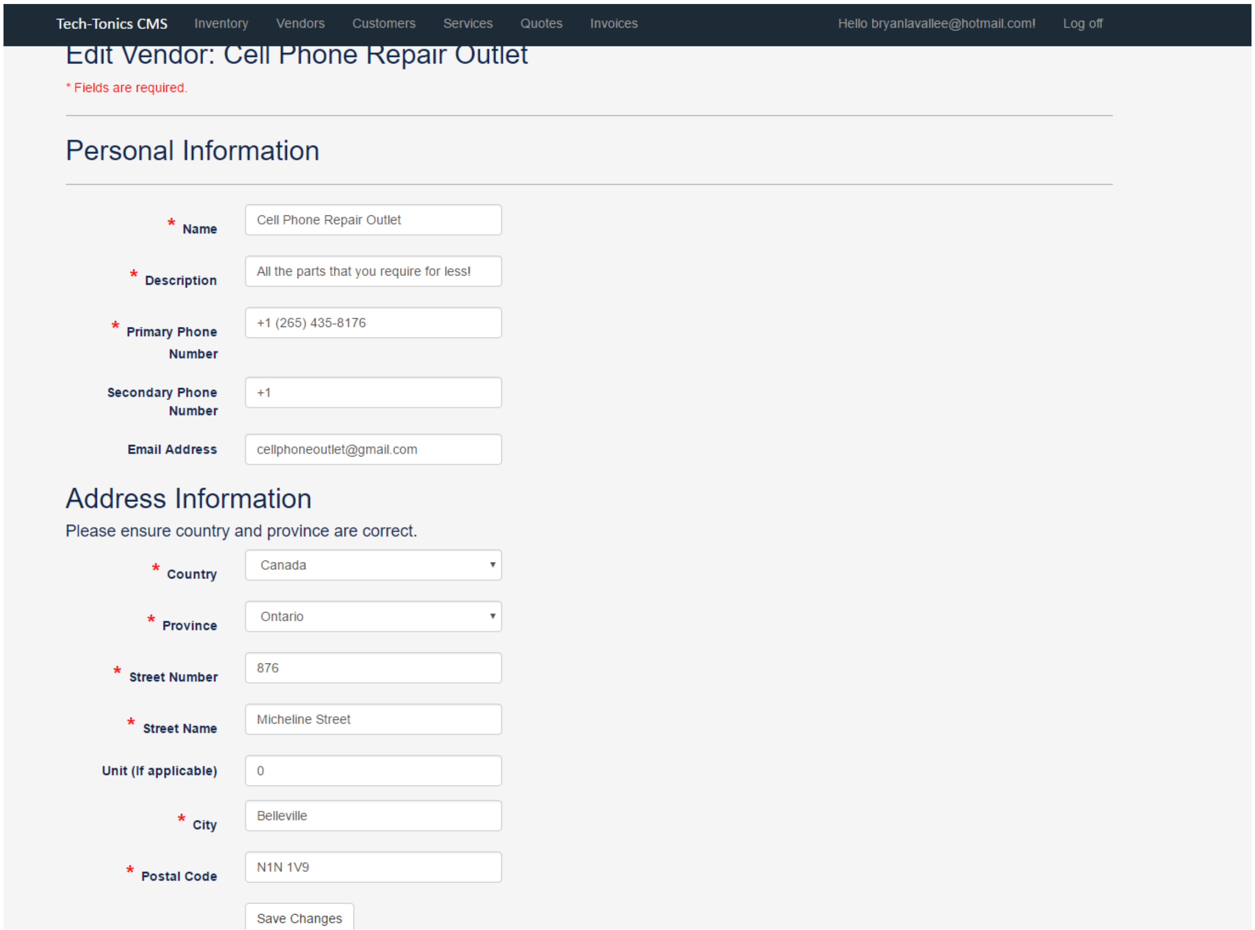
Vendor Creation Page:



Vendor Editing

To edit a vendor, the user must select the edit link from the vendor index page. The link will than send the user to a form with the previous vendor information, and the user can than edit any information. All information is subject to validation, and after the user clicks save changes, if there is an error, the user will be notified. Upon validation, the user will be send to the vendor details page. *To modify the items for the vendor, that is done by disabling the item from* *the inventory page. This is due to system requirements and the relationship between items and vendors.*

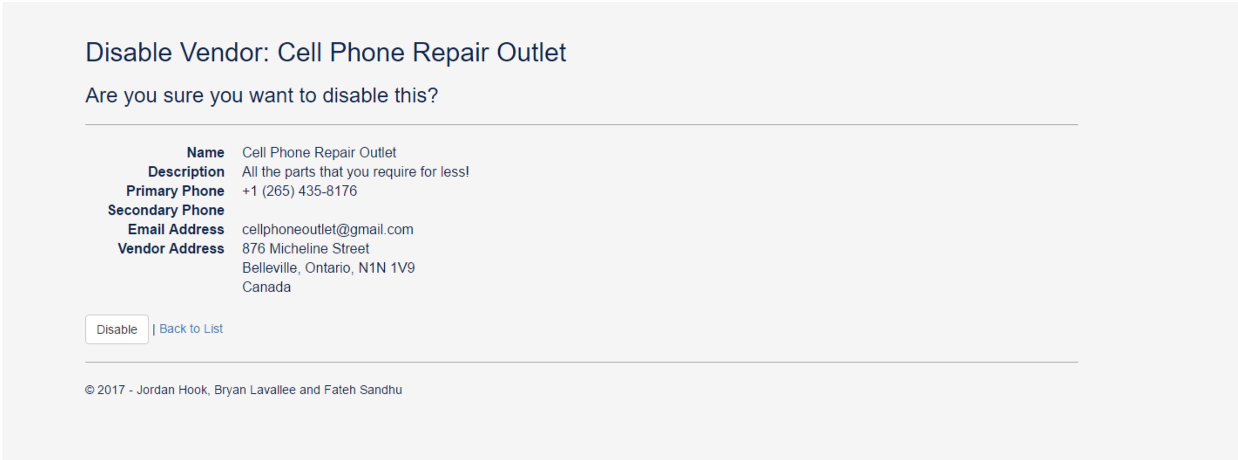
Vendor Editing Page:



Vendor Disabling

To disable a vendor, it is done by selecting the disable link from the vendor index page. This will redirect the user to a confirmation page that will ask if they are sure. Upon clicking the disable button, the vendor will be disabled. What this means, is that it won't appear on the index page, items can no longer be added to this vendor but it won't affect previous item information.

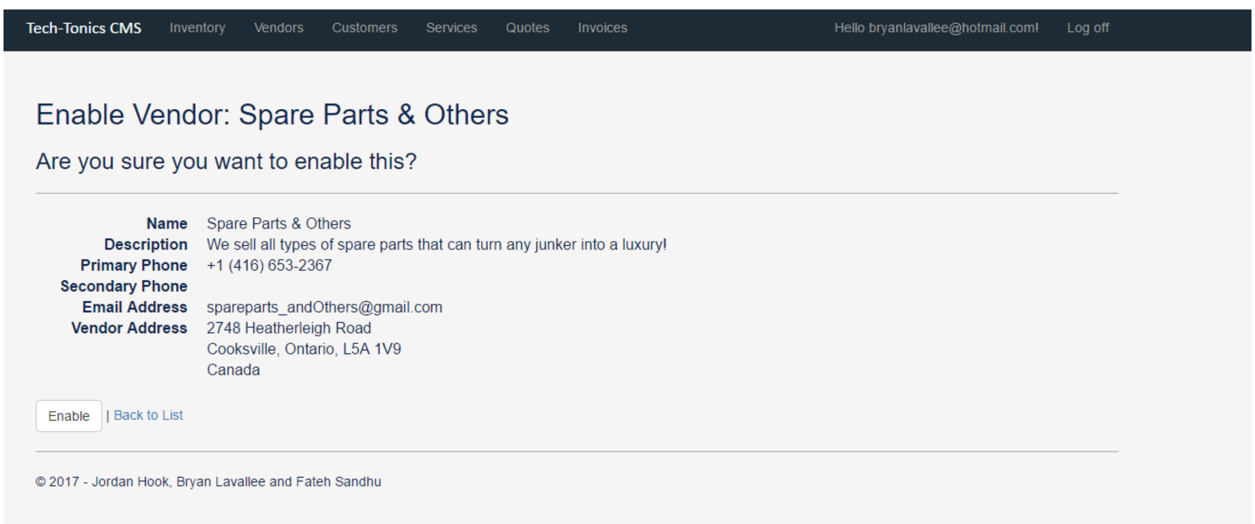
Vendor Disabling Page:



Vendor Enabling:

To enable a vendor, this is done by going to the disabled vendors index page which is accessed by selecting the disabled vendors link on the vendors index page. This will redirect the vendor to the disabled index view, and that is where they can click the enable link. This will take them to a enable confirmation page and upon selecting enable, the vendor will then be available to use.

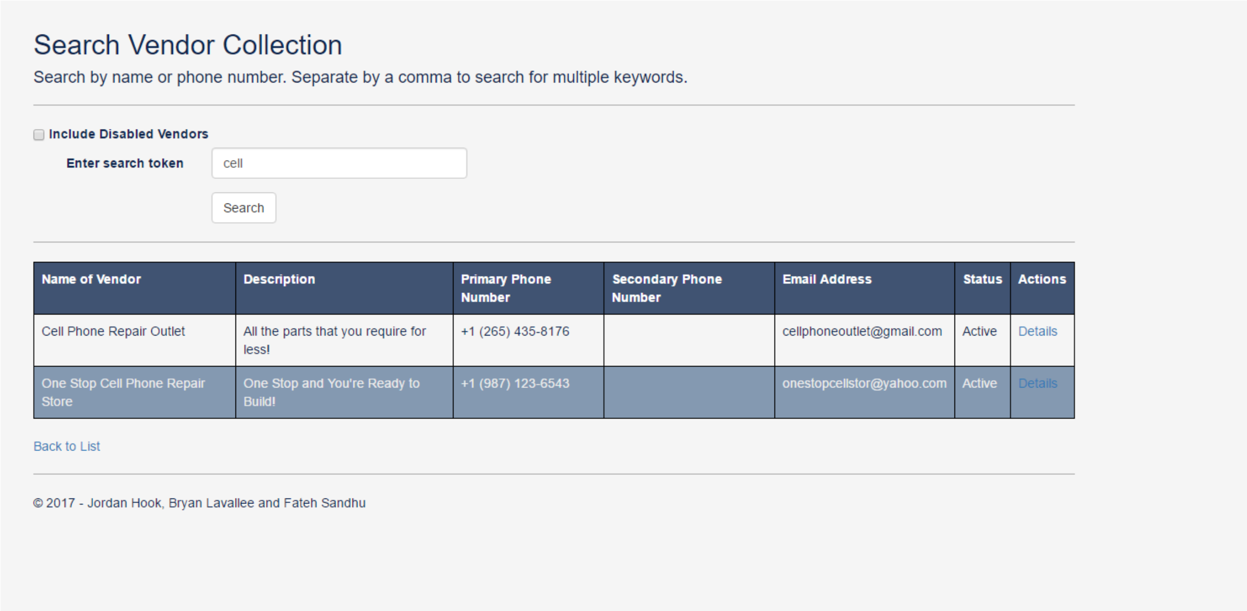
Vendor Enabling Page:



Vendor Search

To search for vendors, it is done by selecting the search link from the vendor index page. This takes them to a form which allows for input of search terms. The system will than search these terms for any vendor which contains the search term in the vendor's name, phone number and secondary phone number. To include disabled vendors, the user must select the check box. Upon sending the search request, it will return a table with appropriate matches and if there is no results, it will tell the user and prompt for new search terms.

Vendor Search Page:



Vendor Details Page:

Services Subsection

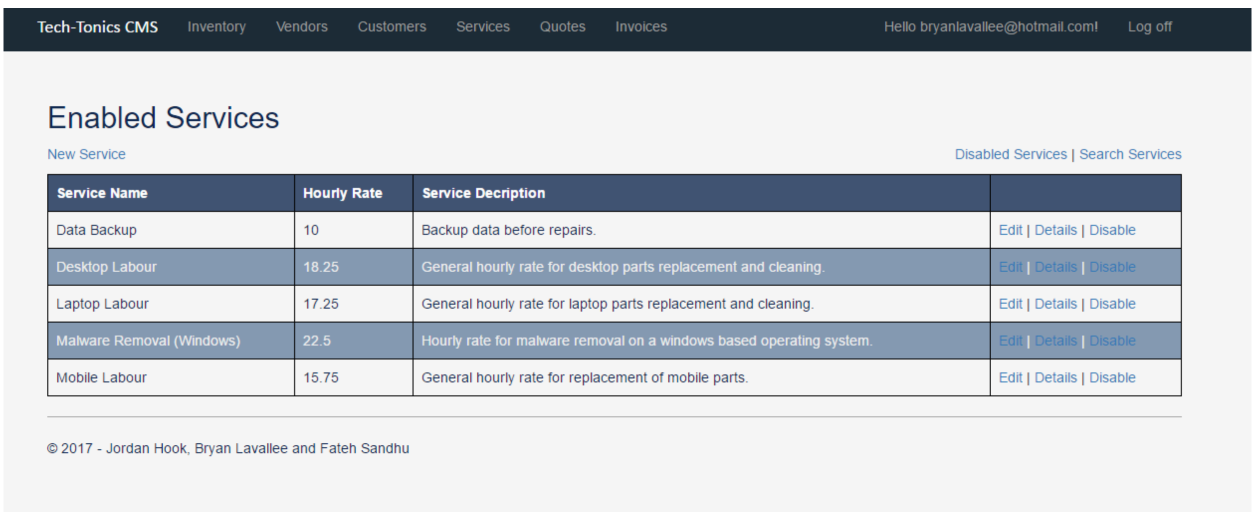
Client Specifications for Services

- Must be allowed to edit them always.
- Disabled services will not be available for use during invoice and/or quote creation.
- Service searching automatically includes disabled services. This is done because the client wished to be able to see previous(disabled) services without needing to specify.

Overview

The service subsection is for the client to update his/her services that he can provide for his customers. The services are used during quote and invoice creation, which will than show to the customer what service they are paying for. To get to the service part of the system, the user must click on the service navigation bar.

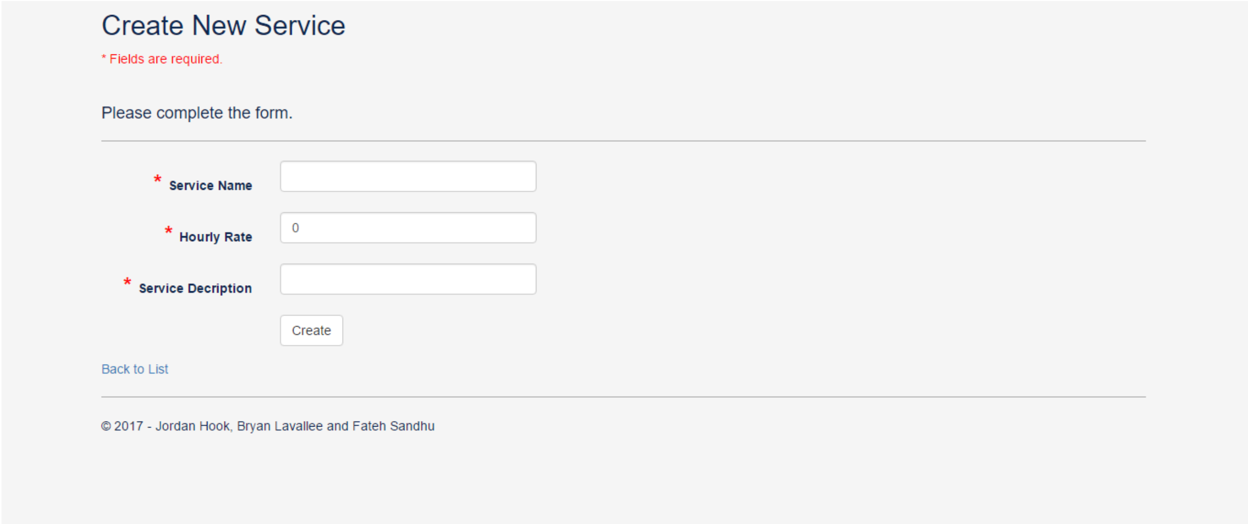
Service Index Page:



Service Creation

To create a service, the user will select the create new link on the service index page. This will send the user to a form which will prompt the user to input all information. This page is subject to validation, and if the information provided doesn't pass, it will notify the user to fix the issues. After successful validation, the service will be created and the user will be redirected to a detail view about the service. After the service is created, the service can be used during quote and invoice creation.

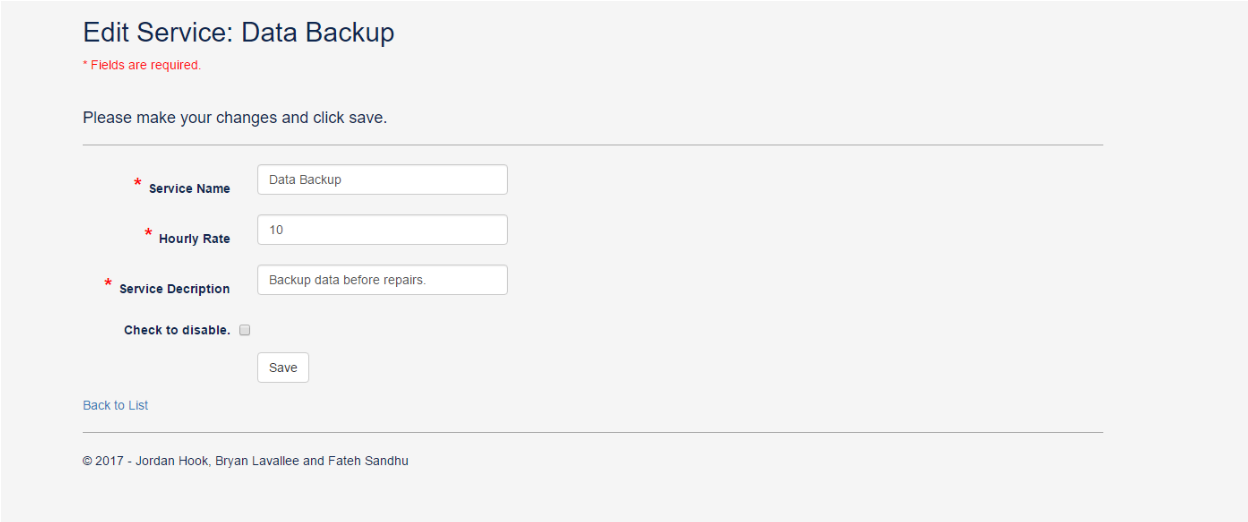
Service Creation Page



Service Editing

To edit a service, the user must select which service they want to edit by clicking the edit link provided on the service index page. This will redirect the user to an edit form with all previous information about the service. The user can that make any changes that he/she pleases, and save the information. Upon successful validation, the service will be edited, and the user will be redirected to the service details page. At any time, if the user wishes to cancel, they can and no information will be saved.

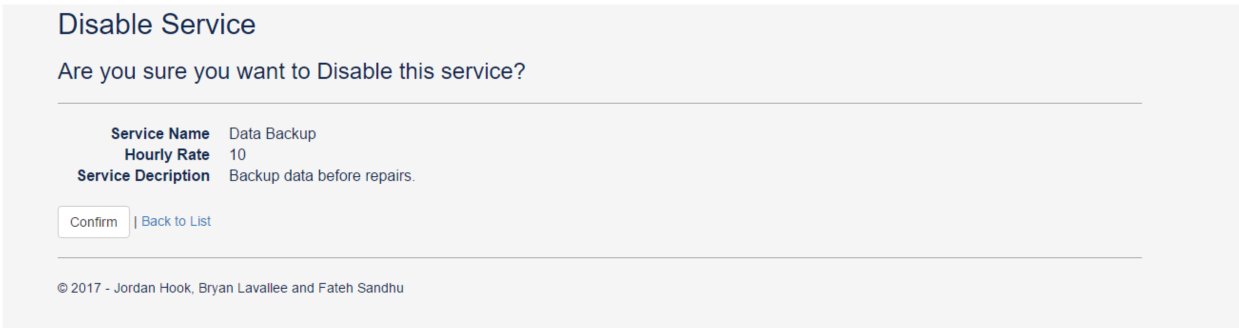
Service Editing Page:



Service Disabling

To disable a service, the user must select the disable link provided for that specific service. This will take them to a confirmation page, and upon confirmation, that service will be disabled. This will make the service not show during invoice and quote creation, and will also not appear on the index page. The service will still appear in search results however.

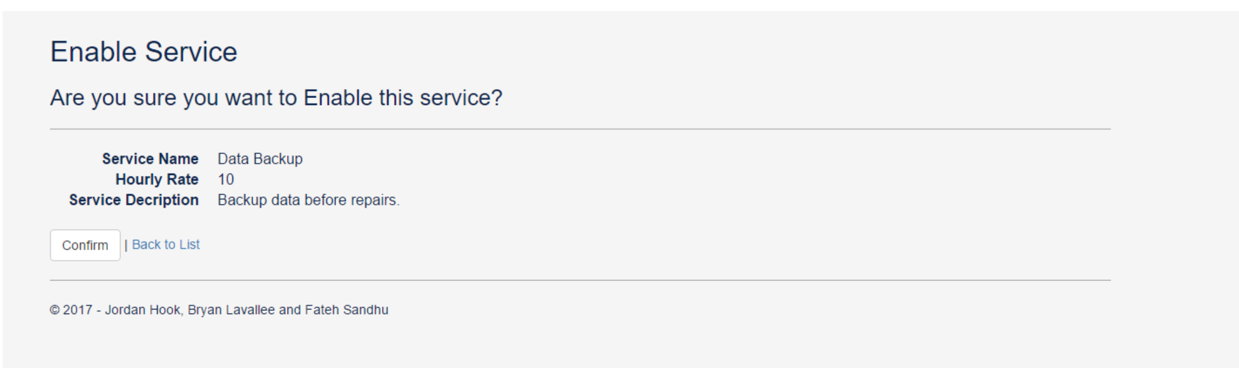
Service Disable Page:



Service Enabling

To enable a service, the user must first go to the disabled services index page, which is done by selecting the link which says, “Disabled Services” from the service index page. This will take them to a list of disabled services, and each disabled service has an enable link. The user will select which service they want to re-enable and click the appropriate enable link. This will take them to a confirmation page and upon confirmation, that service will then be re-enabled. This means that the service will once again become available during the invoice and quote creation process.

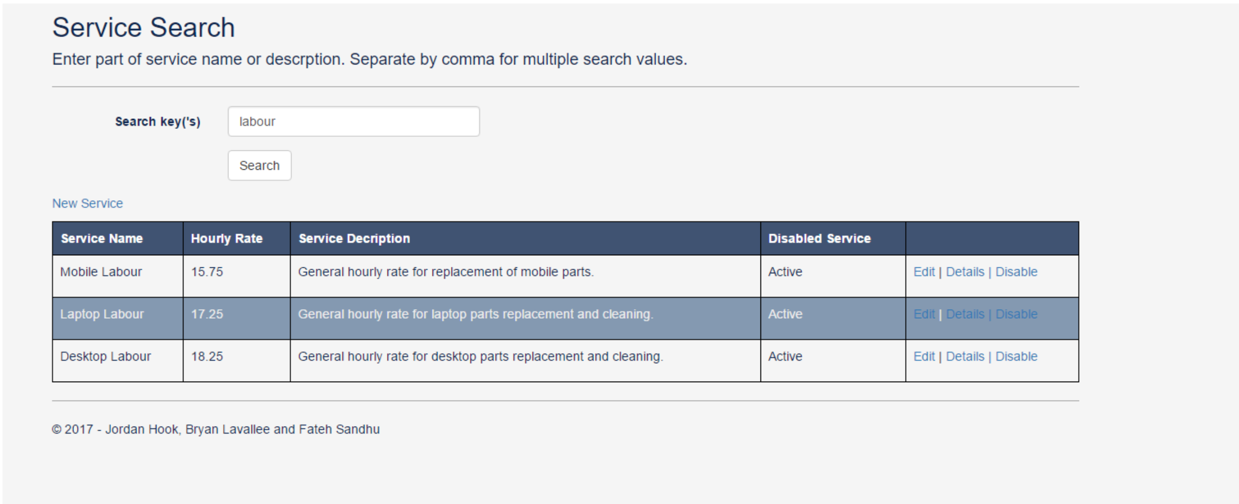
Service Enable Page:



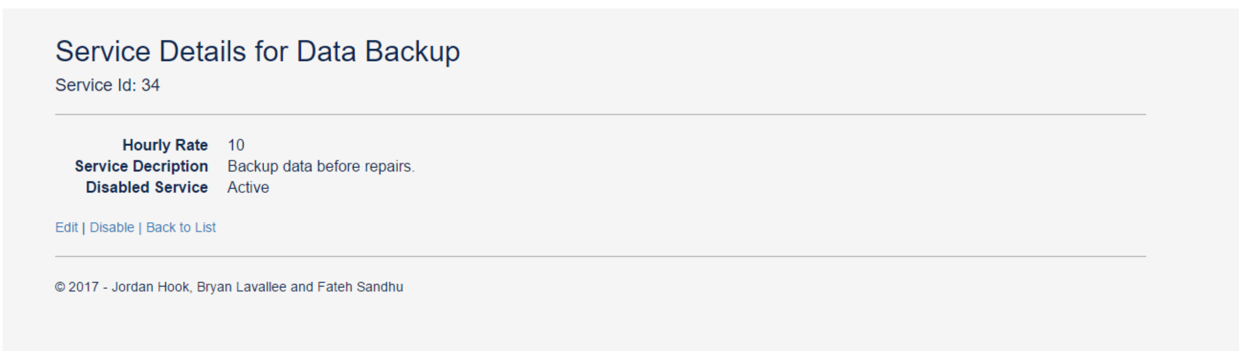
Service Searching

To search for a service, the user will click the search service link provided on the service index page. This will take them to a form which accepts search keys. The system will search all services that contain the entered value in the services name or description. Any results will show in a table format with the appropriate links for the user to select. If no results are found, the system will notify the user, and will prompt for new search keys.

Service Search Page:



Service Details Page:



Quotes Subsection

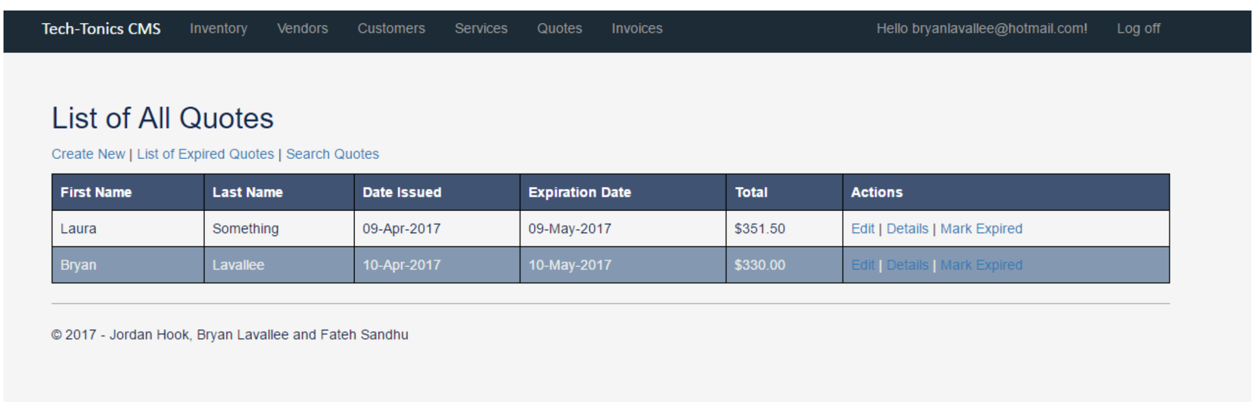
Client Specifications for Quotes

- No customer information saved for quotes.
- Able to print and email quotes.
- Can pick the expiration date.
- Can edit the customer name.
- Can mark a quote expired before the expiration date.

Overview

Quotes is a crucial part of the system. From being able to create quotes for customers to marking a quote expired, all aspects of the Quote subsystem have been meticulously constructed. Quotes are used to give potential customers an insight into how much the service they require would cost them. For this reason, potential customer information isn't saved to the database. An email is used to send the quote to the potential customer if they give an email. There is no way to check if the email is correct, so it is assumed that the information given is the correct email. To access the quote subsystem, the user will have to select Quotes from the navigation bar.

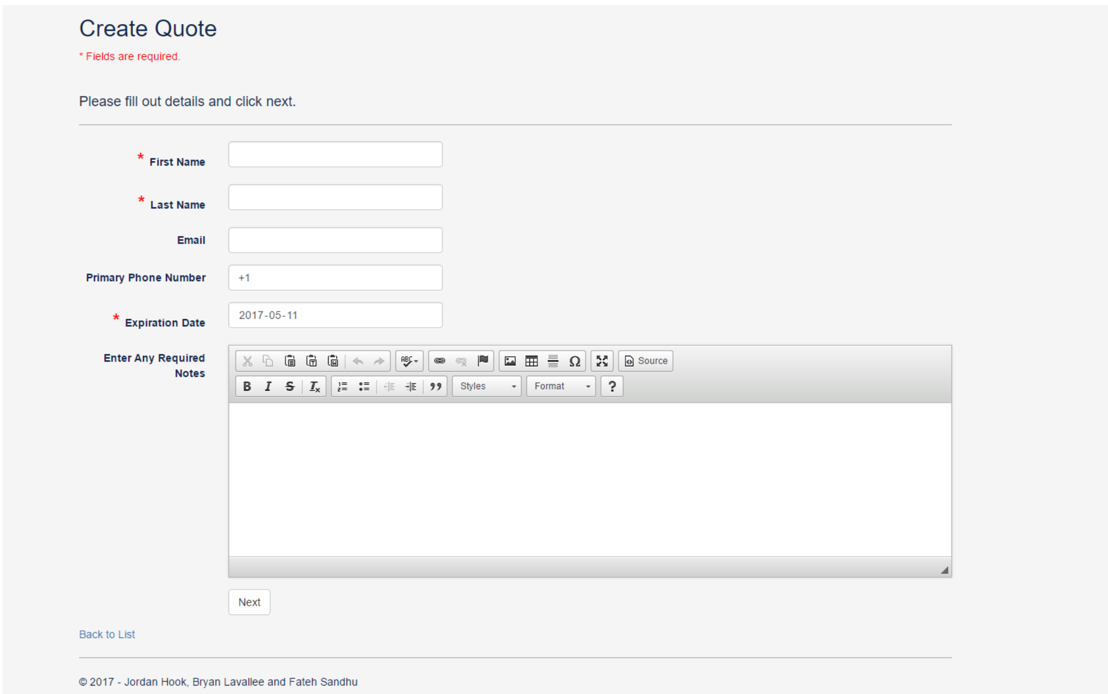
Quote Index Page:



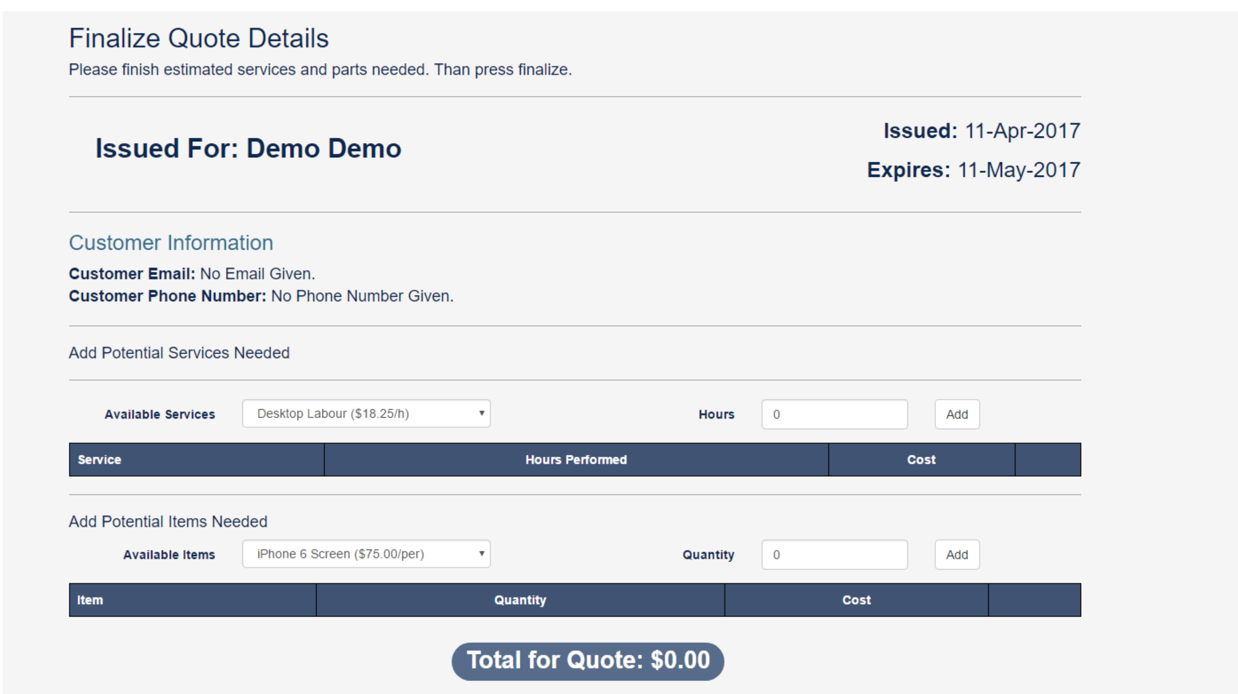
Quote Creation

To create a quote, it is a two-step process. Firstly, the user will need to select the create new link on the index page. This will take them to a form that will ask for the user to input the customer information and after successful validation, it will send the user to the second step. The second step is where the user will add item lines or service lines. These lines show the customer what service will be used, approximate hours and approximate cost. The user can enter any amount of lines and these lines will all be saved to that quote. If the user makes a mistake he can delete the appropriate item/service line and it will automatically save. *Note: The* *page reloads every time for every addition to the quote item/service line. We were unsuccessful at making this just reload the partial view.*

Quote Creation Page 1:



Quote Creation Page 2:



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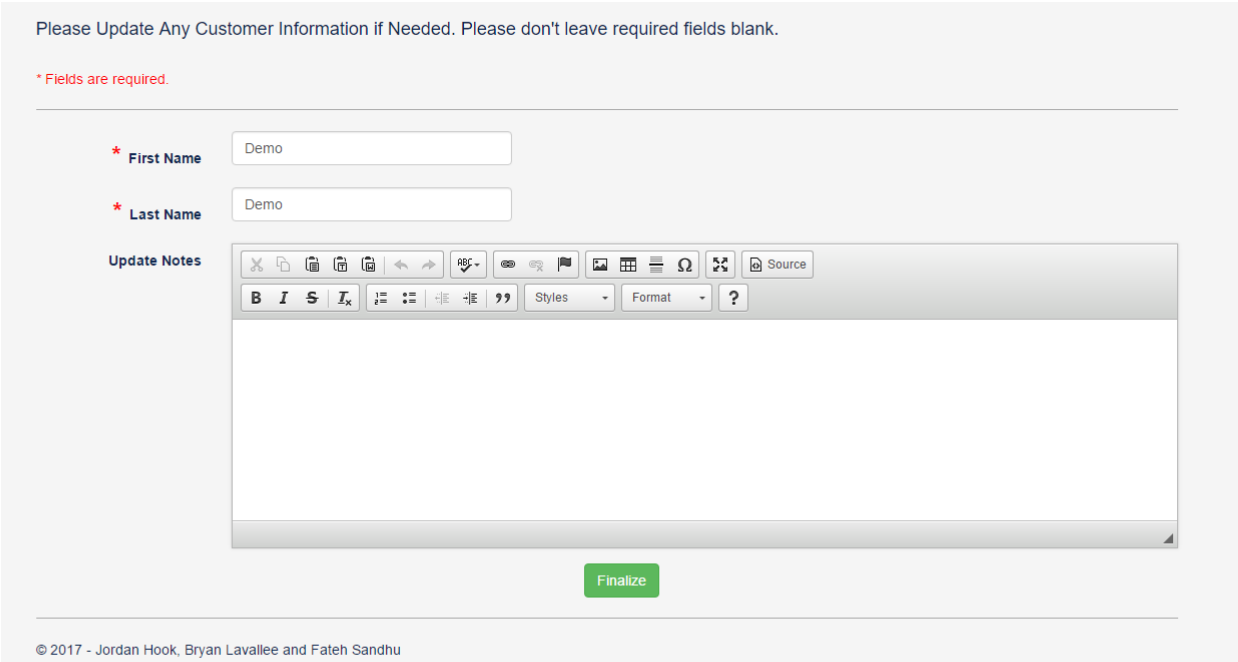


Quote Editing

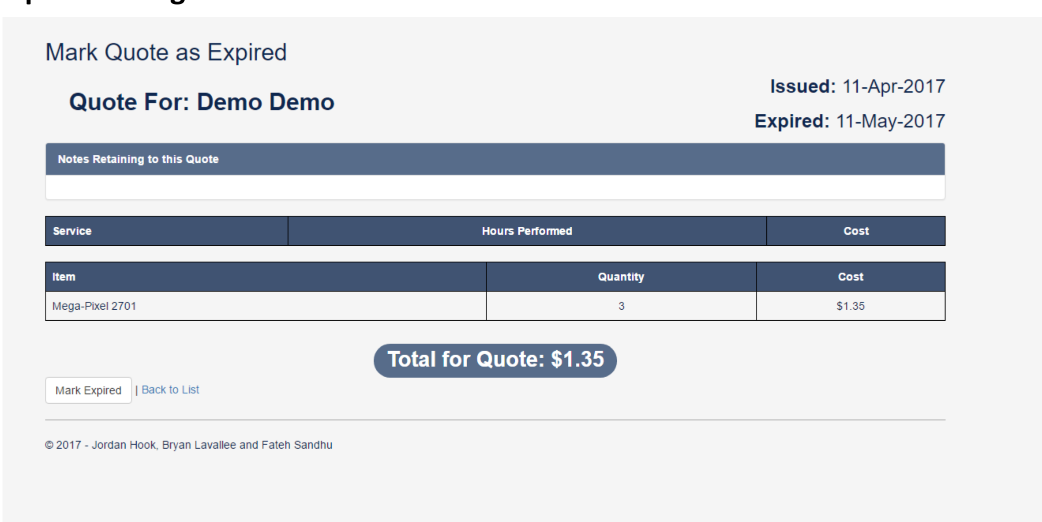
To edit a quote, the user will select an existing quote and click the edit link. All information will automatically load and then the user can make the appropriate changes. All validation and functionality is the same as the second part of quote creation.

Quote Editing Page is same as Creation Part Two.

Quote Expiration

Quote expiration works in two ways, firstly the user can mark a quote expired (usually when it has been used), or the system will automatically mark any quotes that go past its expiration date, expired. This will than make the expired quote only appear in the list of expired quotes.

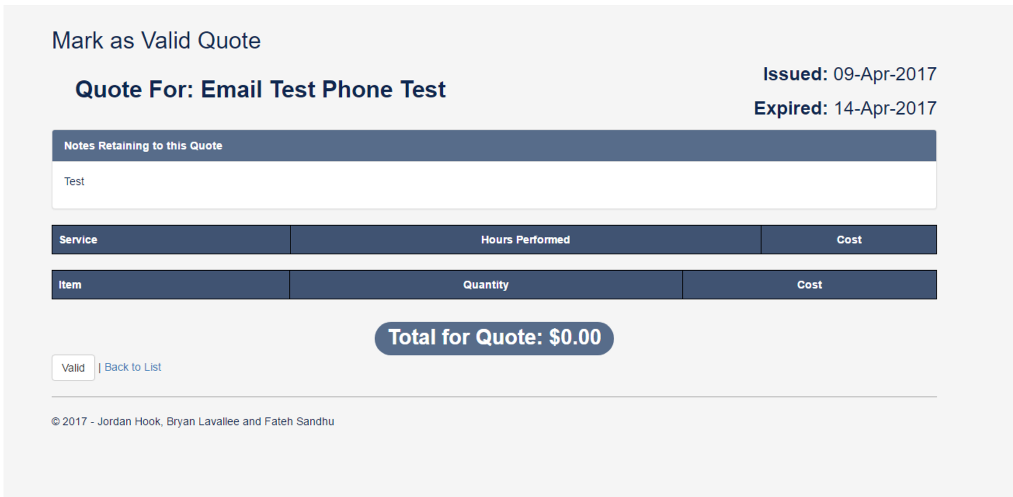
Quote Expiration Page:



Quote Status Validation

This can be done by going to the list of expired quotes and selecting mark valid. From here, the user will be sent to a confirmation page and upon clicking mark valid, the quote will be changed to valid. The user will then be redirected to the index page. **Only quotes that have not past their expiration date, may be marked valid again.**

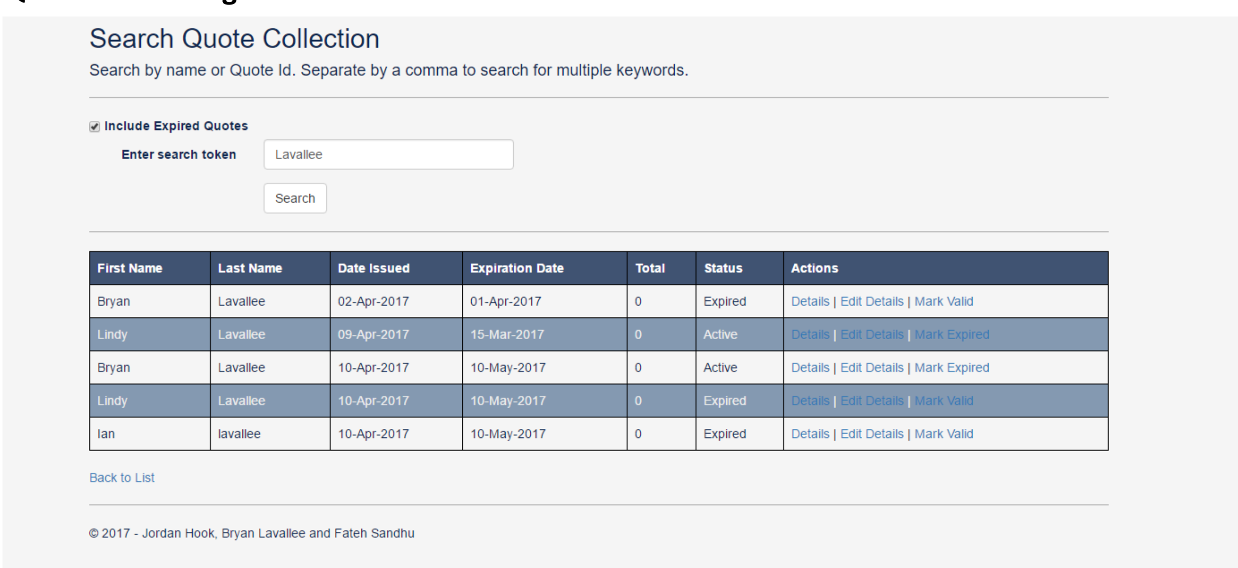
Quote Status Validation Page:



Quote Search

Searching quotes follows the same suit as the other parts of the system. The search initially does not search disabled quotes, but if the user selects to include disabled quotes, the system will than include them. The results are once again, returned in a table format for clean reading. The system will search all quotes with the given search terms to see if any quote contains the search terms in the quotes first name, last name and quote Id.

Quote Search Page:

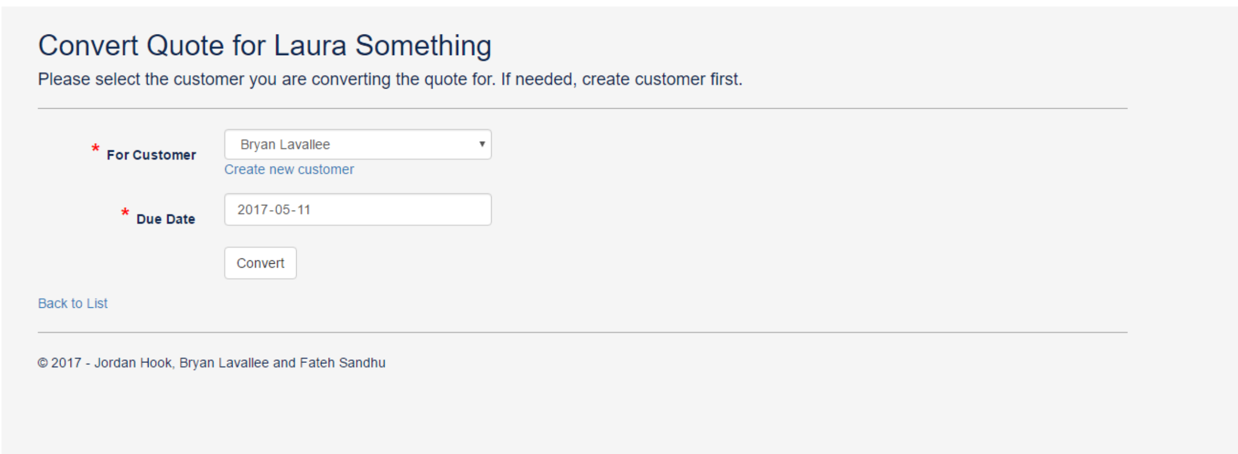


First Name	Last Name	Date Issued	Expiration Date	Total	Status	Actions
Bryan	Lavallee	02-Apr-2017	01-Apr-2017	0	Expired	Details | Edit Details | Mark Valid
Lindy	Lavallee	09-Apr-2017	15-Mar-2017	0	Active	Details | Edit Details | Mark Expired
Bryan	Lavallee	10-Apr-2017	10-May-2017	0	Active	Details | Edit Details | Mark Expired
Lindy	Lavallee	10-Apr-2017	10-May-2017	0	Expired	Details | Edit Details | Mark Valid
Ian	lavallee	10-Apr-2017	10-May-2017	0	Expired	Details | Edit Details | Mark Valid

Convert Quote to Invoice

Converting a quote to an invoice is most likely the most important part of this subsystem. A user can select a quote, and then click on the convert to invoice link. This will take the user to a form which asks the user to select the customer or create the customer. This is needed because quotes don't save customer information. If the system doesn't have that customer, the user will select the create new customer link, and upon creation, it will redirect the user back to the conversion page. After the customer is updated, and the user selects the due date, they can press the convert button. This will convert the quote to an invoice, and all information that was on the quote will be transferred over. **No information is lost and the converted quote is than disabled.**

Quote Conversion Page:



Emailing Quote & Printing Quotes

Emailing a quote is very simple. All the user needs to do is go to details page about the associated quote, and then press the email quote. *Note: Emails are not verified, so it is assumed the customer gives a valid email.* After the user presses the button, the user is notified if the email was sent or not. If the user would rather print the quote, all he needs to do is press the print quote button which is next to the email button. This loads a printer-friendly page for printing.

Email Looks Like:

Q U O T E

Summary:

Issued For: Bryan Lavallee

Quote Number	31
Issued Date	10-Apr-2017

Service	Hours Performed	Cost
Data Backup	3	30

Item	Quantity	Cost
iPhone 6 Screen	9	75

Total	$330.00
Expiration Date	10-May-2017

Additional Details

Quote Email Test

If at anytime you have issues or concerns about the above invoice, please don't hesitate to contact me. All my contact information is listed below. Thank you again for your business.

Contact Information

Email: ryan@techtonics.ca
Phone: 289-691-1777
Address: 3141 Williamson Rd.
Cobourg, ON K9A 4J7
Website: www.techtonics.ca

Quote Printer Friendly Page:

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QUOTE no. 31

11-Apr-2017

ryan@techtonics.ca

www.techtonics.ca

3141 Williamson Rd.
Cobourg, ON K9A 4J7

289-691-1777

Summary:

Issued For: Bryan Lavallee

Issued: 10-Apr-2017

Expired: 10-May-2017

Customer Information

Customer Email: bryanlavallee@hotmail.com
Customer Phone Number: No Phone Number Given.

Notes Retaining to this Quote
Quote Email Test

Service	Hours Performed	Cost
Data Backup	3	$30.00

Item	Quantity	Cost
iPhone 6 Screen	4	$300.00

Total for Quote: $330.00

Quote Details Page:

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QUOTE no. 34

11-Apr-2017

ryan@techtonics.ca

www.techtonics.ca

3141 Williamson Rd.
Cobourg, ON K9A 4J7

289-691-1777

Summary:

Issued For: Demo Demo

Issued: 11-Apr-2017

Expired: 11-May-2017

Customer Information

Customer Email: No Email Given.
Customer Phone Number: No Phone Number Given.

Notes Retaining to this Quote

Item	Quantity	Cost
Mega-Pixel 2701	3	$1.35

Total for Quote: $1.35

Thank You!

Mark Expired | Edit Details | Convert to Invoice | Back to List | Print Email Quote

<u>Invoice Subsection</u>

Client Specifications for Invoices

- Cannot create an invoice for a customer unless they have a profile.
- Easy ability to email and print invoices.
- Can pick the due date.
- List of paid, expired and due invoices.
- Ability to archive invoices. (Invoices are not displayed unless directly searched.)

Overview

The invoice subsection is similar quotes in both look and how it acts, however it has one fundamental difference. Invoices are not optional and need to be paid. Invoices allows the user to email invoices to customers, keep track of invoices, see what invoices are overdue and creating new ones. *Invoices must be directly associated with a customer, so if that customer does not exist, a customer profile must be created.* To access the invoice subsection, the user must select Invoices on the navigation bar.

Invoice Index Page:

Recent Invoices

Create New

Search | Paid Invoices | Overdue Invoices

ID	Customer	Issued Date	Due Date	Total	
0007	Bryan Lavallee	09-Apr-2017	09-May-2017	$20.00	Edit | Details | Mark Paid
0008	Marko Polo	09-Apr-2017	09-May-2017	$440.00	Edit | Details | Mark Paid
0009	Lindy Lavallee	09-Apr-2017	18-May-2017	$0.00	Edit | Details | Mark Paid
0010	Sam Smith	10-Apr-2017	26-May-2017	$25044480.75	Edit | Details | Mark Paid
0011	Bryan Lavallee	10-Apr-2017	10-May-2017	$0.00	Edit | Details | Mark Paid
0012	Bryan Lavallee	10-Apr-2017	13-Jan-2017	$75.00	Edit | Details | Mark Paid

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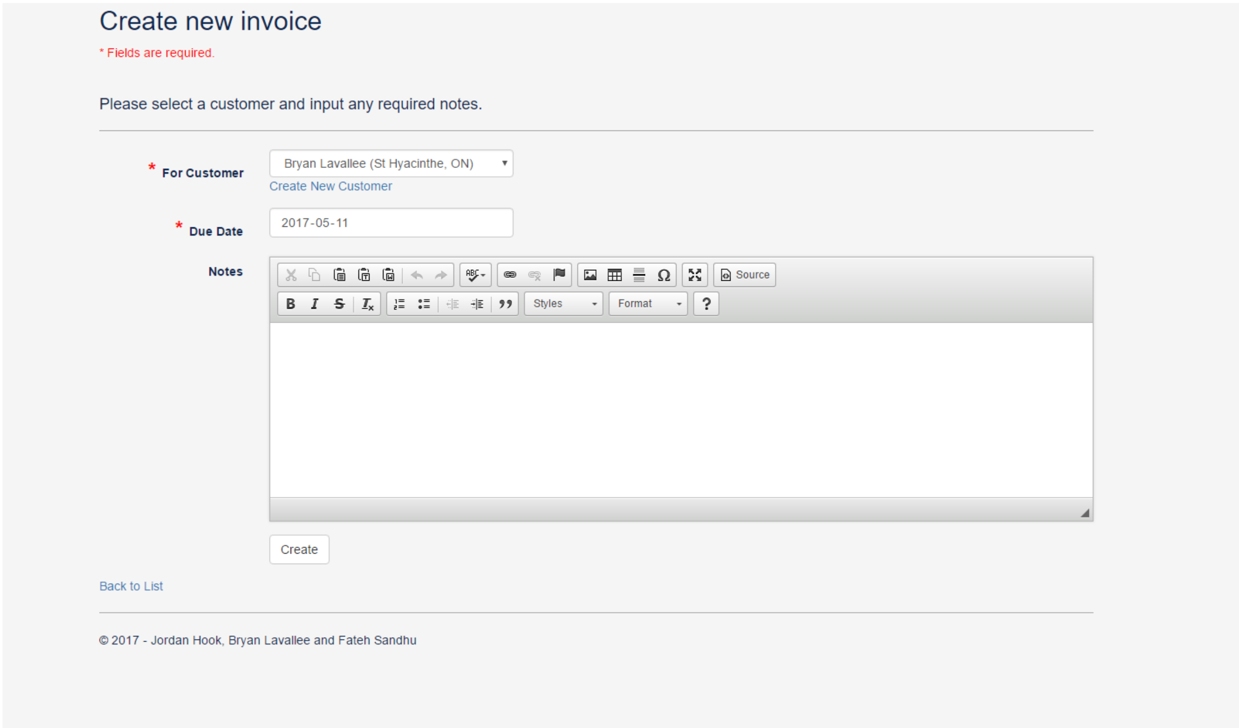
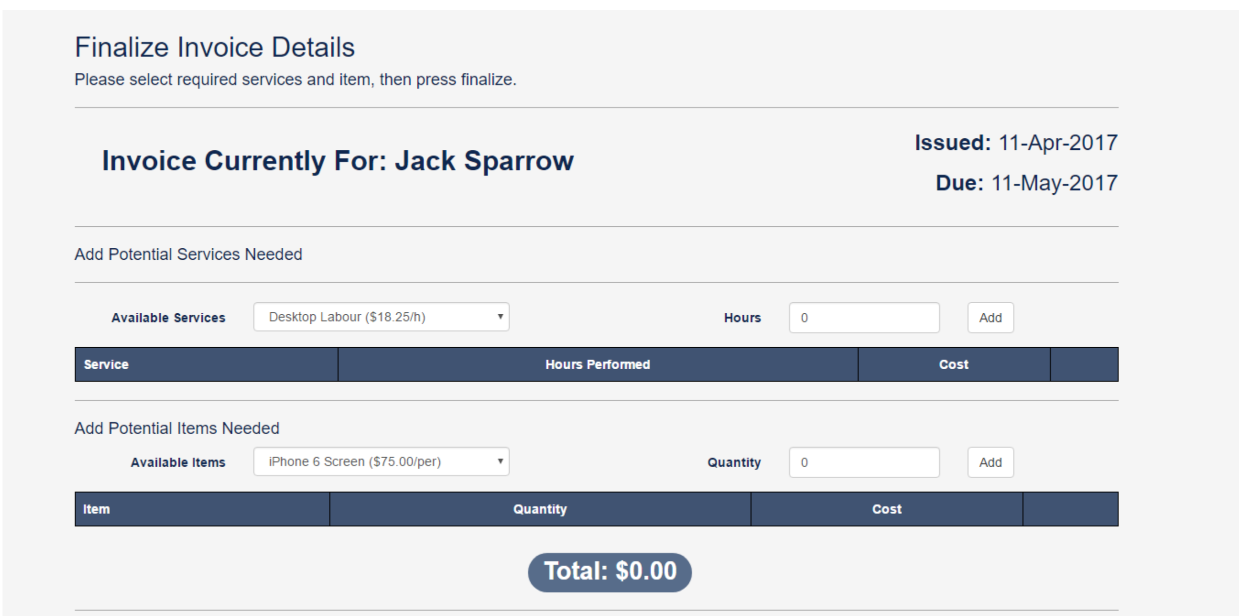
Invoice Creation

To create an invoice, the user will select the create new link from the index page. From here, the user will enter in all necessary information for the first step. This is where they will enter what customer is getting an invoice, and the due date. After this, they will be sent to the second step which looks like the quote creation page. From here they will enter in all information before finalizing. That will then take them to a details page about that invoice.

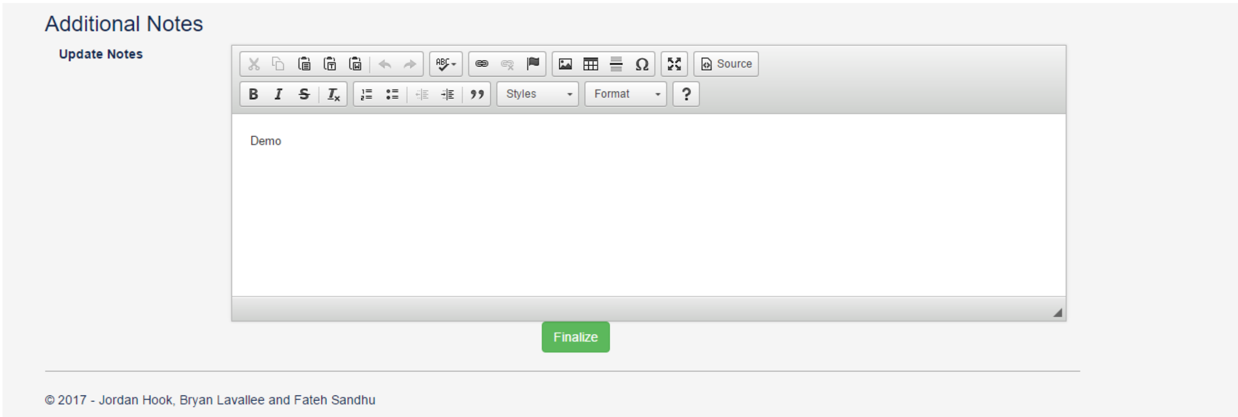
Invoice Creation Page 1:



Invoice Creation Page 2:



CONTINUED



Invoice Editing

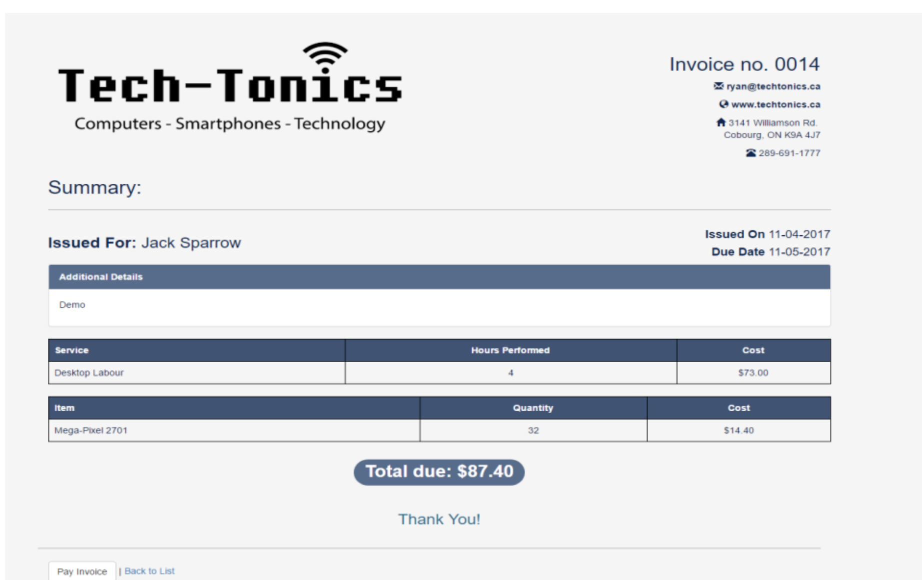
To edit an invoice, the user must select the edit link from the index page. This will load all previous information. However, the user may only edit the services provided or the item used, and the notes. Everything else is set in stone as per the system requirements. After the user is finished, they will press the finalize button and will be redirected to the details view for that invoice. The information will be saved to the database automatically.

Page is the same as invoice creation page 2.

Invoice Paying

Invoice paying is the ability for the user to mark which invoices have been paid. **THIS DOES NOT HAVE THE ABILITY TO TAKE PAYMENTS.** This is purely for documentation and no money is exchanged through our system. The user will select which invoice they want to mark as paid, and then select pay invoice. This will than update that invoice, and move it to the paid invoices index page. It also gets a nice green stamp that says paid.

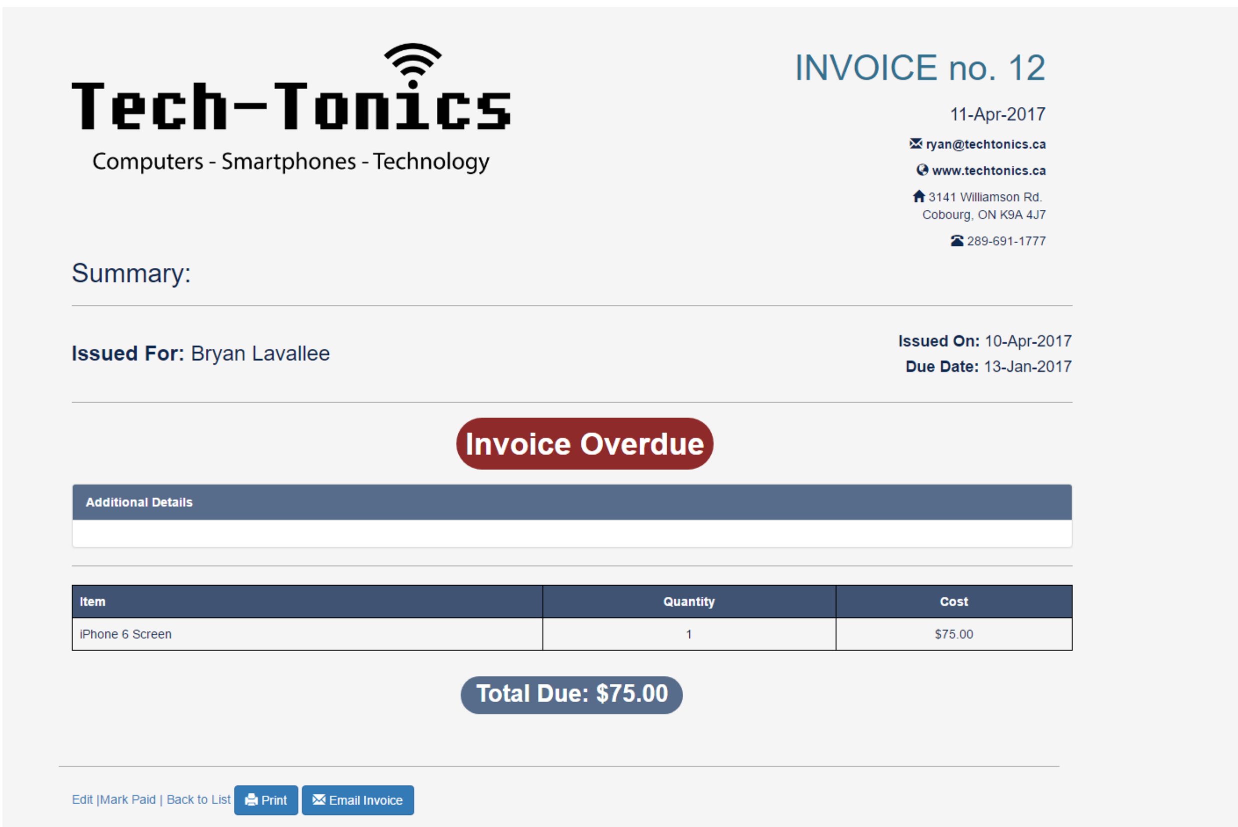
Pay Invoice Page:



Overdue Invoices

Overdue invoices are a list for invoices that have not been paid and the date has gone past the invoices expiration date. From here the user will be able to see what invoices need to be paid, and which customers have not paid. To make a invoice not overdue, the user must mark it paid, so the customer will need to pay before. **Once again, this system does not have the ability to accept payments. This is purely a bookkeeping function.** To access the list of overdue invoices, the user must select the overdue invoices link on the invoices index page.

Example of Overdue Invoice:



Invoice Search

Searching for an invoice works just like all the other searches. The search form takes a search key which searches all invoices to see if they contain the search key in that invoices customer first name, last name, or the invoices id. The result will be table with the appropriate information, or a message which says no information was found.

Invoice Search Page:

Search Invoice Database

Search by customer name or invoice Id. Separate by a comma to search for multiple keywords.

☐ **Include Archived Invoices**

Enter search token Bryan

Search

Create New

Results

ID	Customer	Issued Date	Due Date	Total	Status	
0007	Bryan Lavallee	09-04-2017	09-05-2017	$20.00	DUE	Edit |Mark Paid | Details
0011	Bryan Lavallee	10-04-2017	10-05-2017	$0.00	DUE	Edit |Mark Paid | Details
0012	Bryan Lavallee	10-04-2017	13-01-2017	$75.00	DUE	Edit |Mark Paid | Details

Back to List

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Invoice Emailing and Printing

This works exactly like quote emailing and printing. For more detail please see that documentation.

Invoice Email:

I N V O I C E

Summary:

Issued For: Lindy Lavallee

Invoice Number	13
Issued Date	10-Apr-2017

Service	Hours Performed	Cost
Mobile Labour	4	63

Item	Quantity	Cost
iPhone 7 Plus Screen	-44	100

Total	$363.00
Due Date	26-May-2017

Additional Details

Mom made quote.

If at anytime you have issues or concerns about the above invoice, please don't hesitate to contact me. All my contact information is listed below. Thank you again for your business.

Contact Information

Email: ryan@techtonics.ca
Phone: 289-691-1777
Address: 3141 Williamson Rd.
Cobourg, ON K9A 4J7
Website: www.techtonics.ca

Printer Friendly Page:

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INVOICE no. 14

11-Apr-2017

ryan@techtonics.ca

www.techtonics.ca

3141 Williamson Rd.
Cobourg, ON K9A 4J7

289-691-1777

Summary:

Issued For: Jack Sparrow

Issued On: 11-Apr-2017
Due Date: 11-May-2017

Additional Details
Demo

Service	Hours Performed	Cost
Desktop Labour	4	$73.00

Item	Quantity	Cost
Mega-Pixel 2701	32	$14.40

Total Due: $87.40

Invoice Archiving

Archiving is unique to invoices, and no other part of the system can do this. Archiving an invoice is non-reversible, and makes the invoice not show up anywhere in the system. This is done so the client/user can make a paid invoice not show up in searches and in the list. This removes clutter, while still having the information saved in the database. To archive an invoice, the user must go to the paid index page, and then click details for that specific invoice. From here, they will click the archive link, and this brings them to a confirmation page. A warning is shown to state that the invoice will not show up, and that it is not reversible.

Invoice Archive Page:

Are you sure you want to archive this?

Archived Invoices will not show up anywhere and this is non-reversible. You will have to search for it directly.

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INVOICE no. 13

11-Apr-2017

ryan@techtonics.ca

www.techtonics.ca

3141 Williamson Rd.
Cobourg, ON K9A 4J7

289-691-1777

Summary:

Issued For: Lindy Lavallee

Issued On: 10-Apr-2017
Due Date: 26-May-2017

PAID - 10-04-2017 - Thank You!

Additional Details

Mom made quote.

Service	Hours Performed	Cost
Mobile Labour	4	$63.00

Item	Quantity	Cost
iPhone 7 Plus Screen	3	$300.00

Invoice Detail Page:

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INVOICE no. 14

11-Apr-2017

ryan@techtonics.ca

www.techtonics.ca

3141 Williamson Rd.
Cobourg, ON K9A 4J7

289-691-1777

Summary:

Issued For: Jack Sparrow

Issued On: 11-Apr-2017
Due Date: 11-May-2017

Additional Details

Demo

Service	Hours Performed	Cost
Desktop Labour	4	$73.00

Item	Quantity	Cost
Mega-Pixel 2701	32	$14.40

Total Due: $87.40

Edit |Mark Paid | Back to List Print Email Invoice