User’s Guide

Quote & Invoice 0.1.0-Beta

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2 INTRODUCTION

A desktop application to keep track of your customers and generate quotes and invoices. This project was adapted from a Microsoft Access application I made for my client's business. As part of my Python learning journey, I decided to convert the Access application to a desktop application using Python and Tkinter. The application has a number of features, which include storing and retrieving customer information, products and services, quotations and orders, as well as generating quotes and invoices based on quotations and orders saved in the database.

3 INSTALLATION

3.1 INSTALLATION ON WINDOWS

This application has only been tested on a 64-bit Windows 10 machine so far. To install the application on your Windows computer, download the exe installer and follow on-screen instructions.

4 INTERFACE/HOW-TO

4.1 USER REGISTRATION AND AUTHENTICATION

When launched, the application checks if there is an Admin user in the database. If it finds one, it displays the login dialog (with the **Register** button disabled as only one Admin user is currently allowed in the database, while non-Admin users—not yet implemented—can only be registered by the Admin) for the user to sign in.

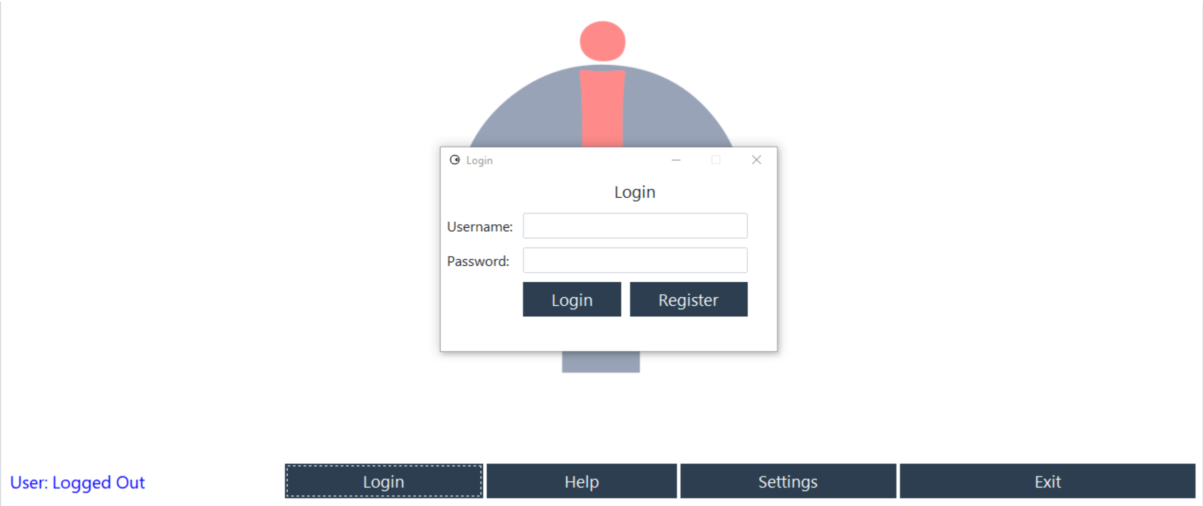


Figure 1 Login dialog

If no Admin user is found in the database, the application displays a login dialog with the **Register** button activate. Clicking this button will open the Admin registration window, where the user can complete the registration process.

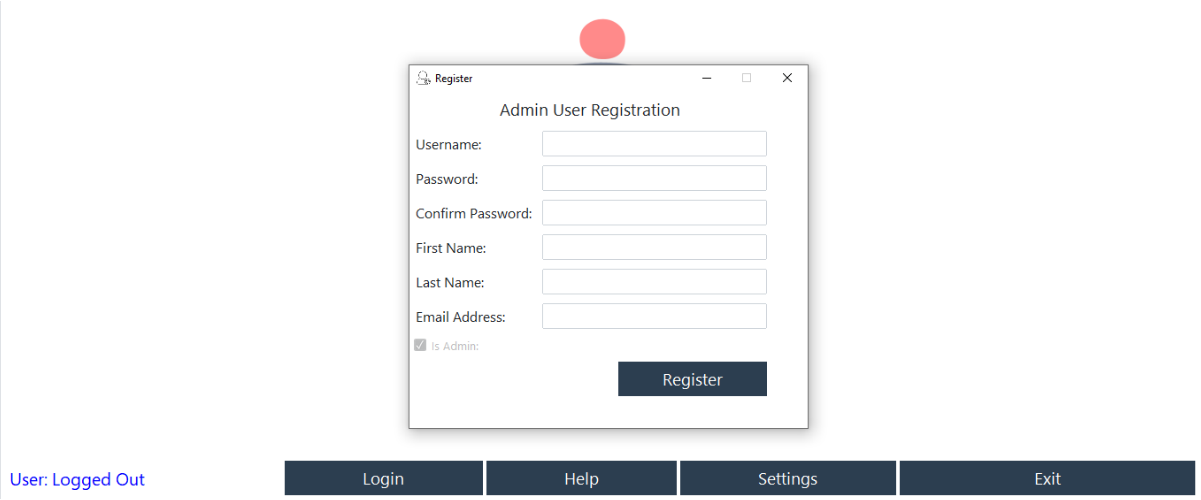


Figure 2 Admin user registration page

Once registered successfully, the user will be automatically logged in to access the rest of the application functionalities. On every launch of the application, the user will be prompted to login.

The username of the currently logged in user will be displayed at the bottom left corner of the Home tab, and the **Login** button will change to **Logout**.

5 SETTINGS

The application comes with some configurable settings. Where settings have not been configured by the user, the application uses default settings. This version provides two types of settings, namely, General Settings and Folder Settings. User Settings is not yet implemented

5.1 GENERAL SETTINGS

General Settings provides option to update the VAT rate and quotation validity period. If these options are not configured, the application will use default values of 15% and 30 days, respectively.

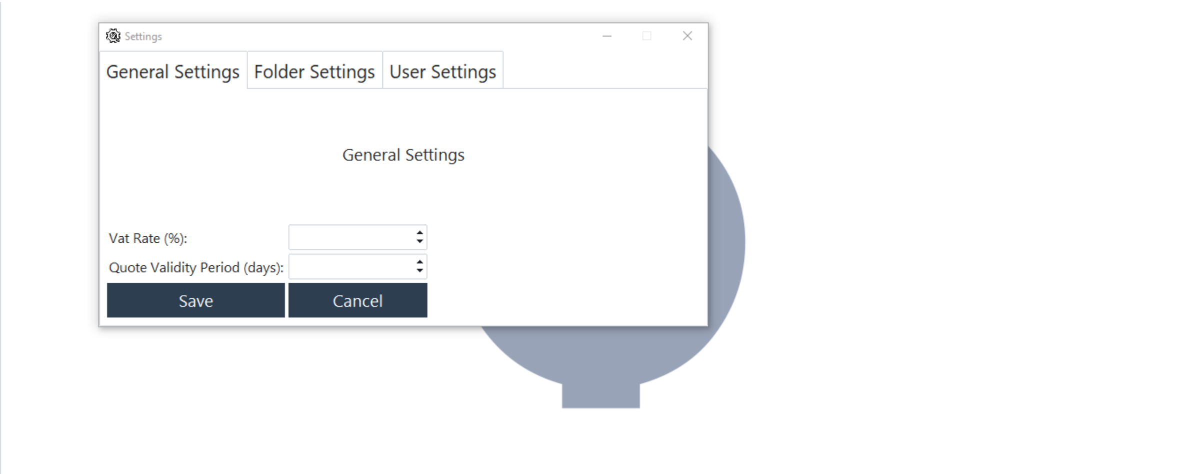


Figure 3 General settings

5.2 Folder Settings

Folder Settings provide options to configure locations (folders/directories) where the application should look for quotation and invoice templates as well where it should output the generated quotations and invoices.

If these options are not configured by the user, the application will look for templates in the application's working directory. The application will also use the same location as the destination for generated quotations/invoices.

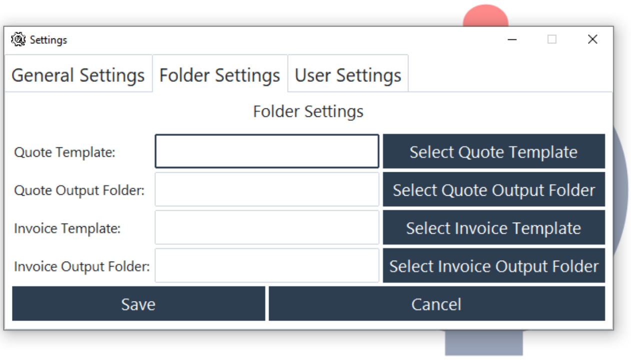


Figure 4 Folder settings

6 Customers

6.1 Add/Update Customers

Quote & Invoice allows storing and updating of customer details. To add a new customer, go to **Customer Details** tab and complete the customer data entry form. To modify or view details of a customer stored in the database, search for the customer from the **Customers** tab, select the customer from the list and click **Open Selected Record**. The selected customer will be opened in the Customer Details tab with an option to update.

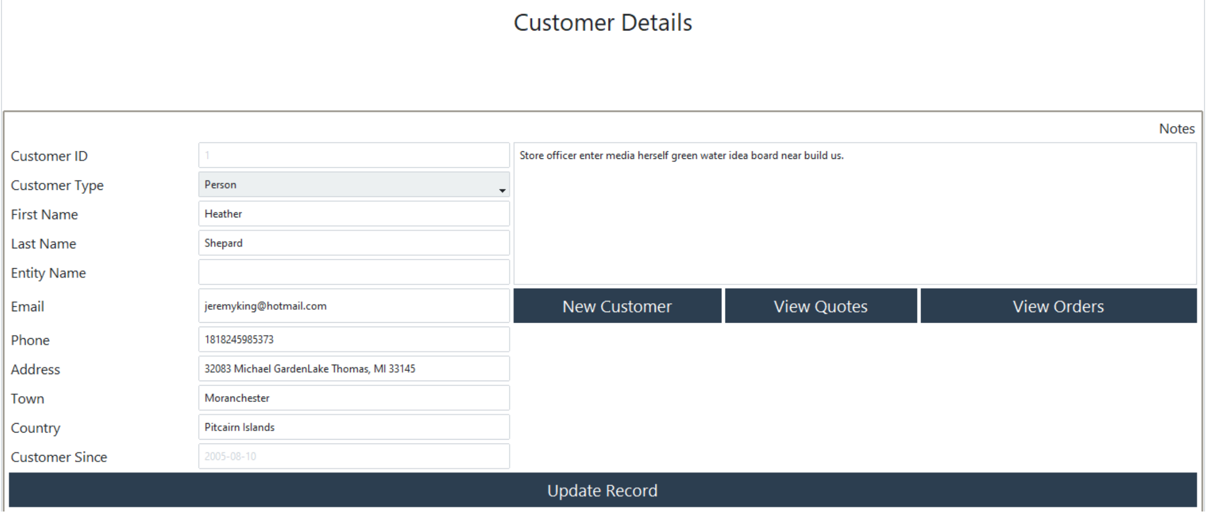
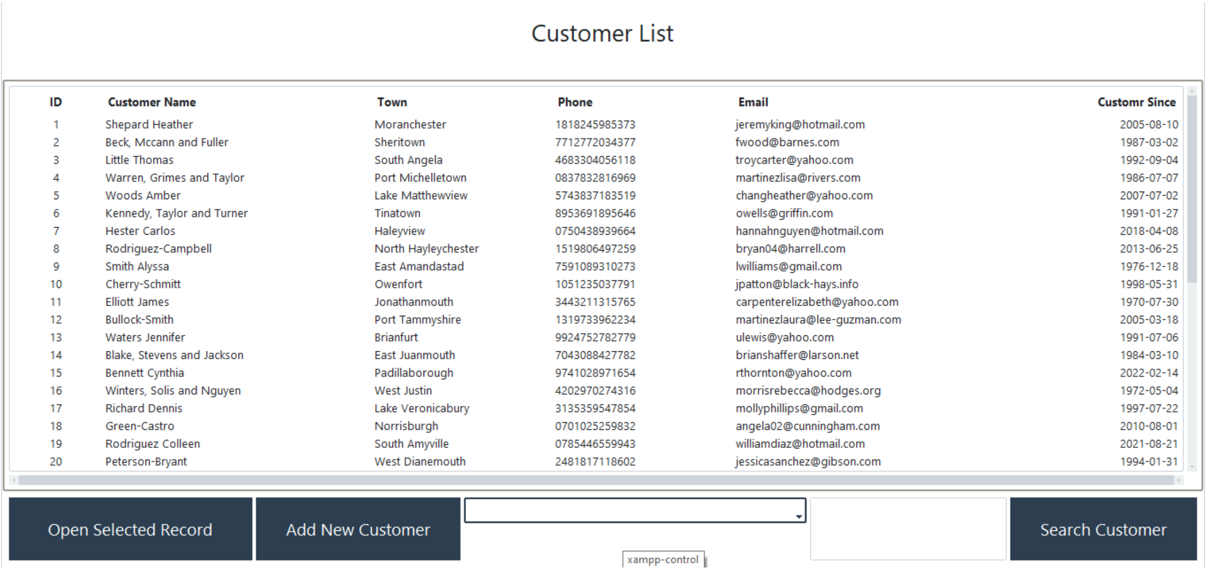


Figure 5 Customer details

The Customer Details page also provides option to view orders and quotes of the currently active customer.

6.2 Retrieve Customers

A list of all customers stored in the database can be viewed on the **Customers** tab. The page also provides an option to search for customers by **Customer ID** or by **Other Variables**, which will search for the provided search text within customer names, towns and emails.



Customer List

ID	Customer Name	Town	Phone	Email	Customr Since
1	Shepard Heather	Moranchester	1818245985373	jeremyking@hotmail.com	2005-08-10
2	Beck, Mccann and Fuller	Sheritown	7712772034377	fwood@barnes.com	1987-03-02
3	Little Thomas	South Angela	4683304056118	troycarter@yahoo.com	1992-09-04
4	Warren, Grimes and Taylor	Port Michelletown	0837832816969	martinezlisa@rivers.com	1986-07-07
5	Woods Amber	Lake Matthewview	5743837183519	changheather@yahoo.com	2007-07-02
6	Kennedy, Taylor and Turner	Tinatown	8953691895646	owells@griffin.com	1991-01-27
7	Hester Carlos	Haleyview	0750438939664	hannahnguyen@hotmail.com	2018-04-08
8	Rodriguez-Campbell	North Hayleychester	1519806497259	bryan04@harrell.com	2013-06-25
9	Smith Alyssa	East Amandastad	7591089310273	lwilliams@gmail.com	1976-12-18
10	Cherry-Schmitt	Owenfort	1051235037791	jpatton@black-hays.info	1998-05-31
11	Elliott James	Jonathanmouth	3443211315765	carpenterelizabeth@yahoo.com	1970-07-30
12	Bullock-Smith	Port Tammyshire	1319733962234	martinezlaura@lee-guzman.com	2005-03-18
13	Waters Jennifer	Brianfurt	9924752782779	ulewis@yahoo.com	1991-07-06
14	Blake, Stevens and Jackson	East Juanmouth	7043088427782	brianshaffer@larson.net	1984-03-10
15	Bennett Cynthia	Padillaborough	9741028971654	rthornton@yahoo.com	2022-02-14
16	Winters, Solis and Nguyen	West Justin	4202970274316	morrisrebecca@hodges.org	1972-05-04
17	Richard Dennis	Lake Veronicabury	3135359547854	mollyphillips@gmail.com	1997-07-22
18	Green-Castro	Norrisburgh	0701025259832	angela02@cunningham.com	2010-08-01
19	Rodriguez Colleen	South Amyville	0785446559943	williamdiaz@hotmail.com	2021-08-21
20	Peterson-Bryant	West Dianemouth	2481817118602	jessicasanchez@gibson.com	1994-01-31

Figure 6 Customer list

To reset the list, search with an empty search option and empty search text or an empty search text with the option Other Variables.

7 Products and Services

7.1 Add/Retrieve/Update Products & Services

Quote & Invoice allows storing and updating of products and services. To add a new product/service, go to **Products & Services** tab and complete the product/service data entry form.

The page displays a list of all products and services stored in the database. The page also provides an option to search for products/services by **Product ID, SKU, Barcode,** or **Product Name**.

To update the details of a product stored in the database, select the product from the list and its details will be auto populated into the product entry form below with an option to update.

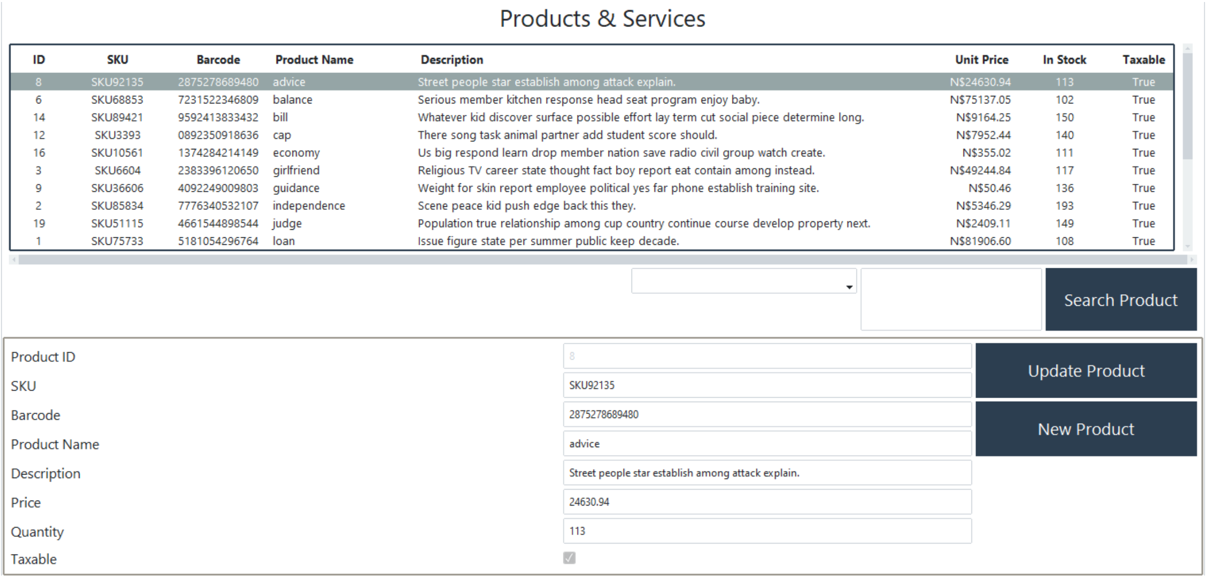


Figure 7 Products & services

8 QUOTATIONS

8.1 ADD/UPDATE QUOTATIONS

The application allows for storing, retrieving and updating of quotations. Adding a new quotation can be done through the quote entry form on the **Quote Details** tab.

Items can be added to the quotation by selecting a product from the product list through the **Product** combobox at the bottom and adjusting its quantity using the **Quantity** spinbox.

Similarly, items can be deleted from the quotation by selecting the item on the quote item list and use the delete button at the bottom of the page.

An existing quote can be updated by first selecting it on the quotation list and opening it from the **Quotations** tab. Only a quotation that has not been accepted or closed can be updated.

If the **Is Accepted** option is checked, the quotation will be marked as closed on save. An unaccepted quotation can be closed with the **Mark As Closed** button.

Using the **Generate Order** button, a quotation active on the Quote Details page can be used to generate a new order that matches that particular quotation.

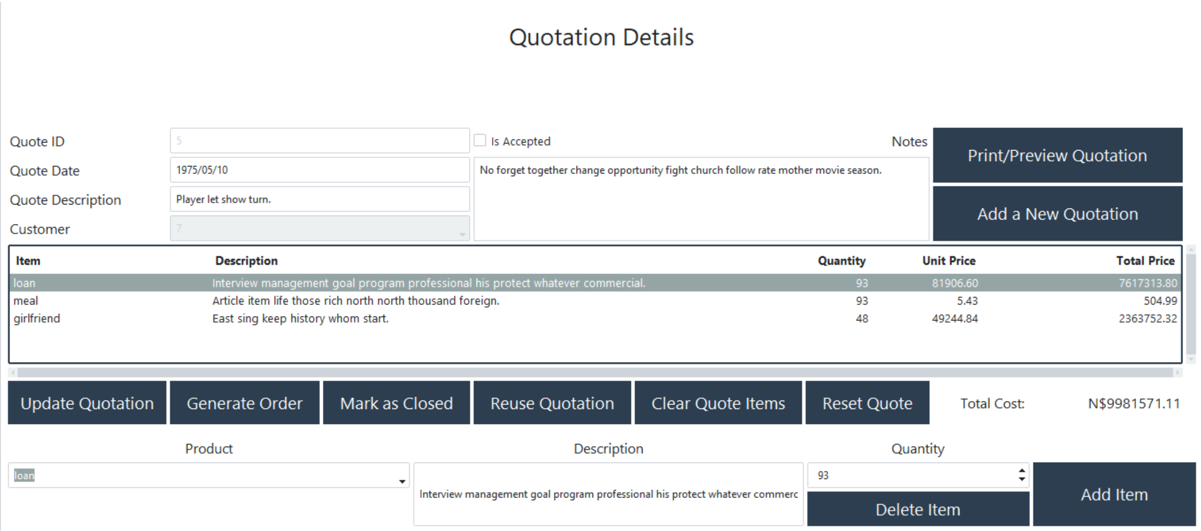


Figure 8 Quote details

> Use the Reuse Quotation button to quickly create a new quotation with the same items as the active quotation.

8.2 Retrieve Quotations

Like the Customers tab, the **Quotations** tab lists all quotations stored in the database. Use the search option on this page to search for a specific quotation using either the **Quote ID**, **Customer ID** or **Other Variables**.

Use the **Open Selected Record** button to open the quotation selected to view its full details or update it in the Quote Details page.

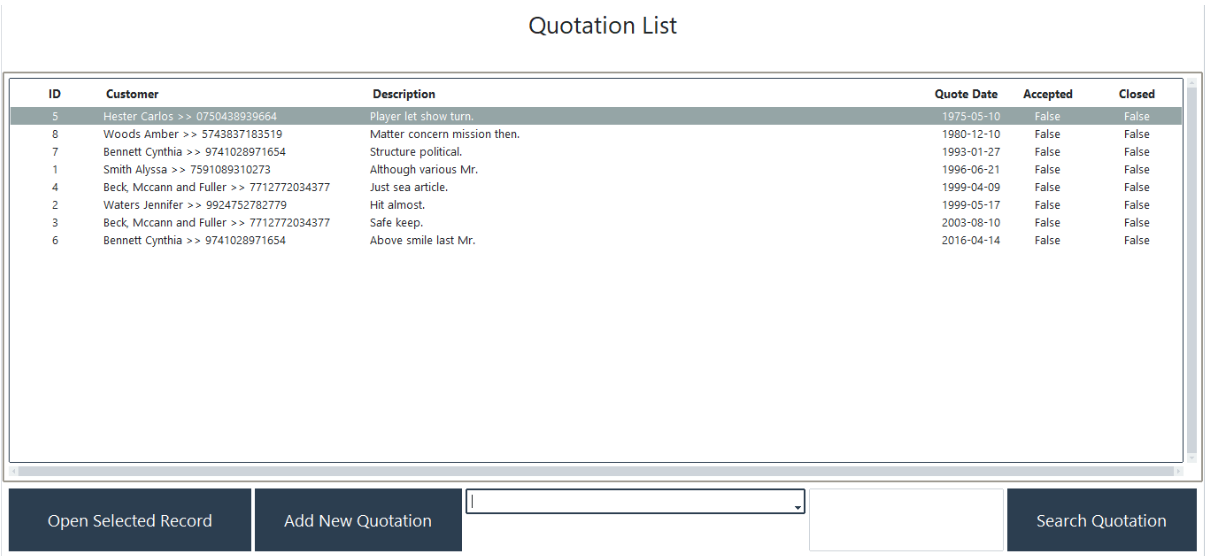


Figure 9 Quotation list

8.3 PRINT/PREVIEW QUOTATIONS

Use the Print/Preview Quotation button to print or preview the active quotation.

8.4 QUOTATION TEMPLATES

The application comes with a customisable quotation template. Use **Folder Settings** to change where the application looks for the quotation template and where it saves the generated quotation.

To open the inbuilt quotation template, click the **Print/Preview Quotation** button without a saved quotation open.

The template can be customised by adding other elements, such as the letterhead. In the template, a **{{ }}** is a placeholder for a value that will come from the quotation when a quote is generated.

With understanding, these placeholders can be moved around, but deleting a placeholder means the referenced element/variable will not appear on the template. To learn more about this template language, visit this website.

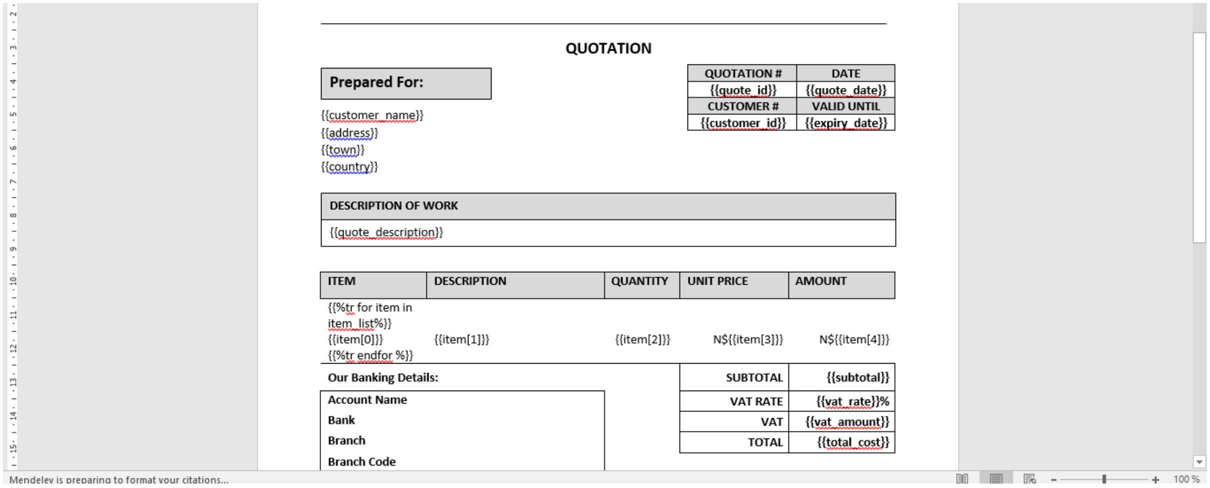


Figure 10 Quotation template

Once you modify the inbuilt template, save it to a new location to avoid overwriting the original template. Then point the application to that new location in the Folder Settings.

9 ORDERS

9.1 ADD/UPDATE ORDERS

The application allows for storing, retrieving and updating of orders. Adding a new order can be done through the order entry form on the **Order Details** tab.

Items can be added to the order by selecting a product from the product list through the **Product** combobox at the bottom and adjusting its quantity using the **Quantity** spinbox.

Similarly, items can be deleted from the order by selecting the item from the order item list and use the delete button at the bottom of the page.

An existing order can be updated by first selecting it on the order list and opening it from the **Orders** tab. Only an order that has not been paid can be updated.

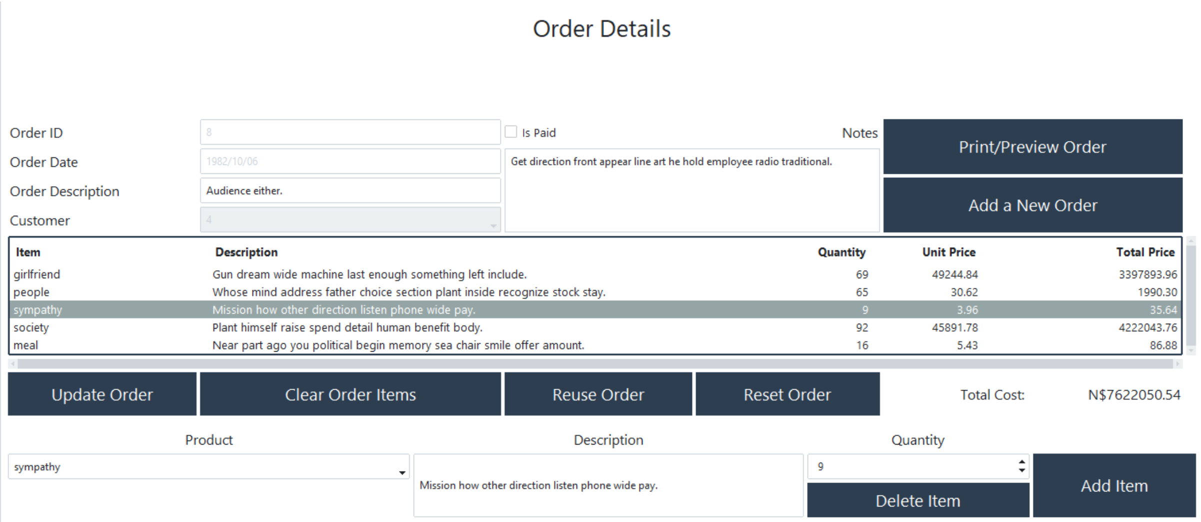


Figure 11 Order details

Use the Reuse Order button to quickly create a new order with the same items as the active order.

9.2 Retrieve Orders

Like the Quotations tab, the **Orders** tab lists all orders stored in the database. Use the search option on this page to search for a specific order using either the **Order ID**, **Customer ID** or **Other Variables**.

Use the **Open Selected Record** button to open the order selected to view its full details or update it in the Order Details page.

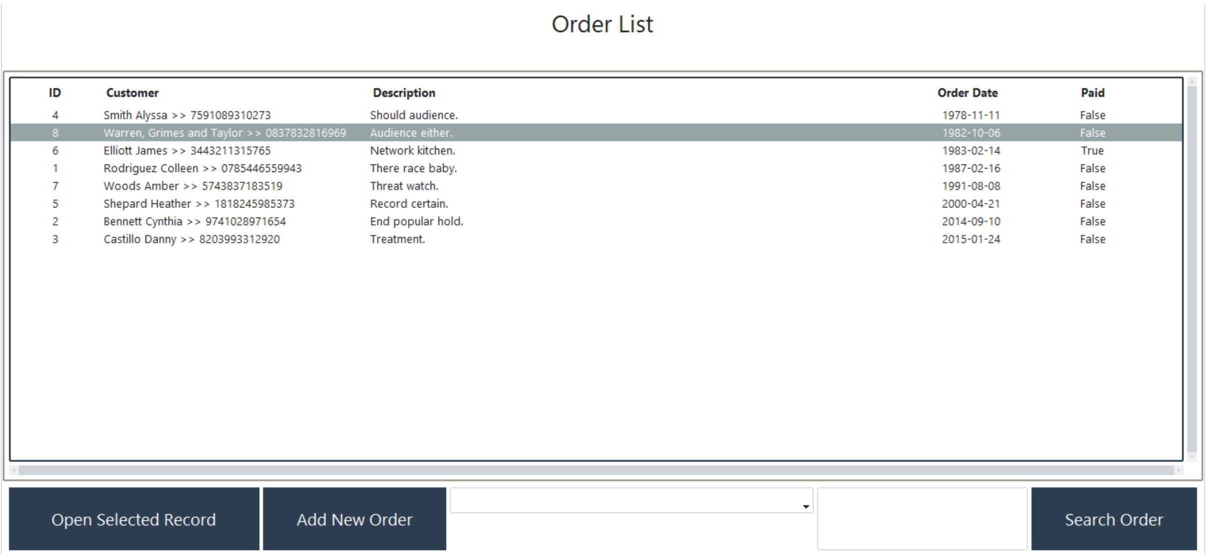


Figure 12 Order list

9.3 Print Invoices

Use the Print/Preview Invoice button to print or preview an invoice of the active order.

9.4 Invoice Templates

The application comes with a customisable invoice template. Use **Folder Settings** to change where the application looks for the invoice template and where it saves the generated invoice.

To open the inbuilt invoice template, click the **Print/Preview Invoice** button without a saved order open.

The template can be customised by adding other elements, such as the letterhead. In the template, a **{{ }}** is a placeholder for a value that will come from the order when an invoice is generated.

With understanding, these placeholders can be moved around, but deleting the placeholder means the referenced element/variable will not appear on the template. To learn more about this template language, visit this website.

A paid order generates a **Tax Invoice** whereas an unpaid order generates a **Proforma Invoice**.

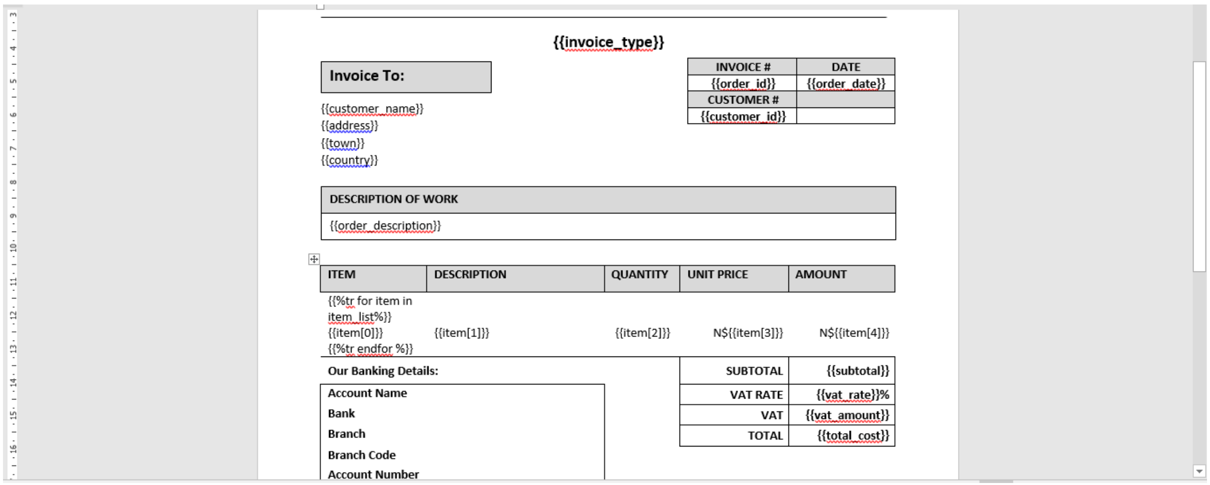


Figure 13 Invoice template

Once you modify the inbuilt template, save it to a new location to avoid overwriting the original template. Then point the application to that new location in the Folder Settings.

10 Contributing

10.1 Feedback

This beta version is released for testing and soliciting feedback from potential users. So, if you think this application might be useful to your business, please share feedback on your impression of the application (what you like about it and what you would like to see or see changed in the release version). Please share your feedback via email to abiatarfestus@outlook.com or by opening an issue on the project's Github repository.

10.2 Contributing to Code/Docs

In addition to the feedback stated above, I welcome any and all contributions! Here are some ways you can contribute:

Report bugs: If you encounter any bugs, please let me know through either of the channels stated above.

Contribute code: The source code of this application is publically available at the above-referenced Github repository. If you are a developer and want to contribute, follow the instructions in the **Readme** file of the repository.

Suggestions: If you don't want to code but have some awesome ideas, open up an issue explaining some updates or imporvements you would like to see.

Documentation: If you see the need for some addition to this documentation, feel free to suggest improvements.

10.3 Some Guide

To aid your feedback, here are some specific areas where I need your input:

1) **Dealing with VAT:** In this version, VAT is applied on the quote/order amount (total cost) rather than on individual items, and it's assumed that either every item is taxable or all items a tax-free (if VAT is set to 0.0%). Would this be ideal for your use case or how would you rather have it?
2) **Reports:** Reports are not yet implemented. What type of reports would you want to have in this type of application?
3) **Customers:** In its current version, quotations and orders can only be made to customers saved in the database. Is this adequate for your use case or would you rather quote/sell to walk-in or anonymous customers?

To see some of the pending changes I planned on implementing, see the Roadmap in the repository [Readme file].