



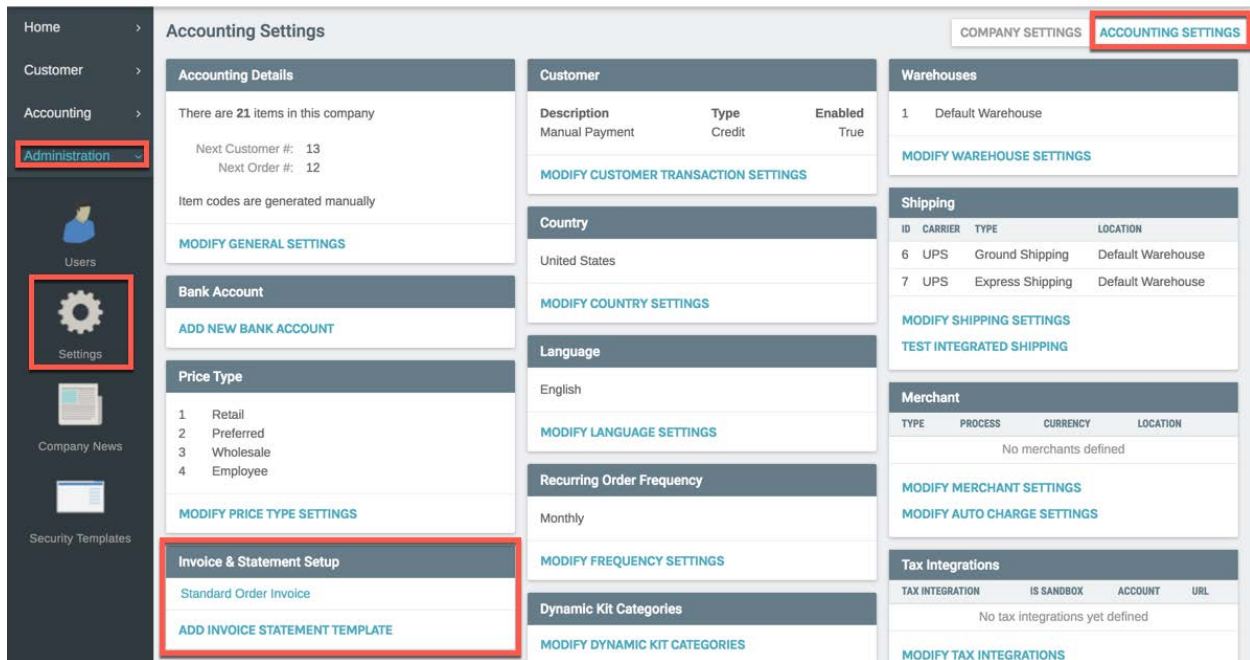
Invoices:

Create a New Invoice Template

v 1.0

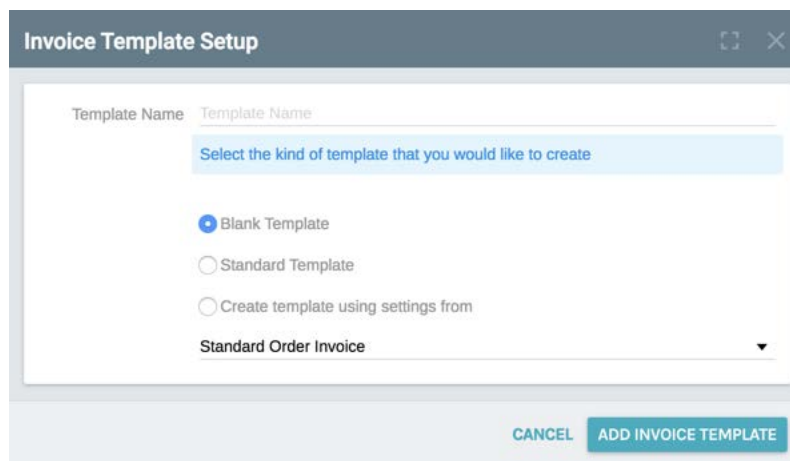
CREATING A NEW INVOICE TEMPLATE

1. Log in to Exigo.com.
2. Go to Administration > Settings > Accounting Settings > Invoice & Statement Setup



The screenshot shows the Exigo Accounting Settings interface. The left sidebar has 'Administration' and 'Settings' highlighted. The main content area shows 'Accounting Settings' with various sub-sections. The 'Invoice & Statement Setup' section is highlighted with a red box, containing a 'Standard Order Invoice' link and an 'ADD INVOICE STATEMENT TEMPLATE' button.

3. Click on "ADD INVOICE STATEMENT TEMPLATE".

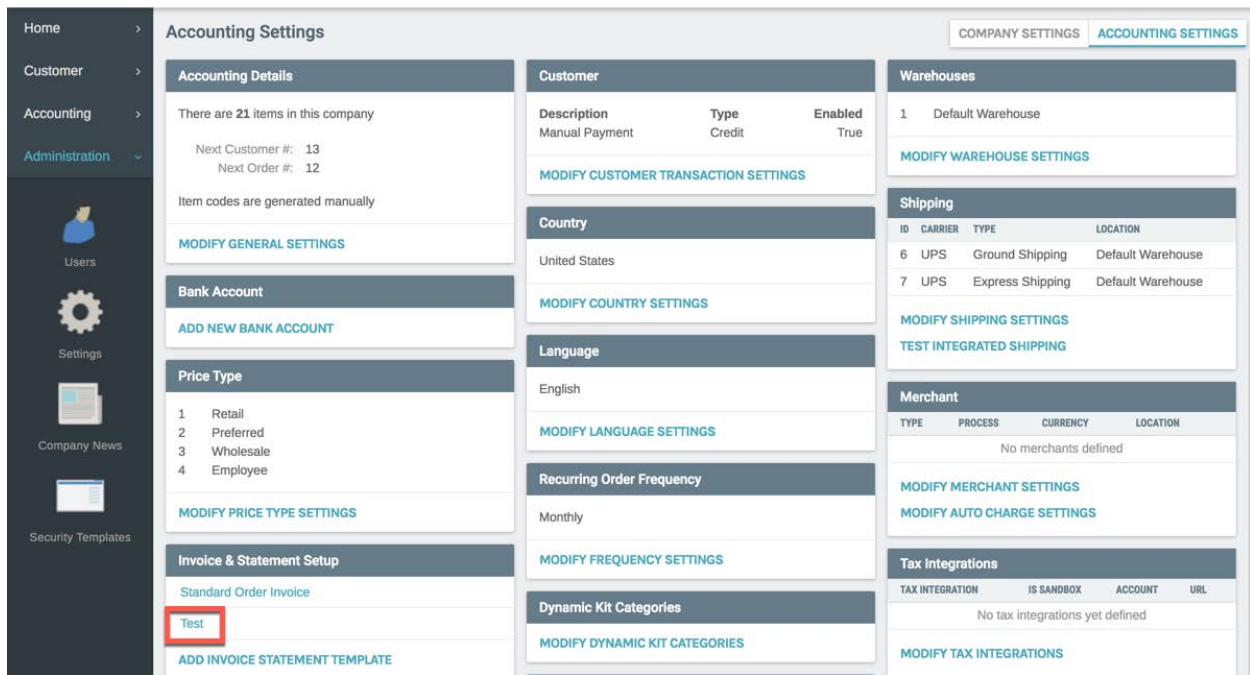


The 'Invoice Template Setup' dialog box contains the following elements:

- Template Name:
- Select the kind of template that you would like to create
- Blank Template
- Standard Template
- Create template using settings from
- Standard Order Invoice (dropdown menu)
- CANCEL
- ADD INVOICE TEMPLATE

4. Enter a Name for the New Invoice Template (This name will be displayed in the Settings Section).

5. Choose the type of Template:
 - a. Blank Template = Create a Template using no pre-populated fields.
 - b. Standard Template = Create a Template using the most common pre-populated fields.
 - c. Create Template Using Settings From = Create a Template based on another template in the drop down list.
6. Choose Standard Template.
7. Click "ADD INVOICE TEMPLATE".
8. The Invoice & Statement Template Setup Section will now contain the newly created template.
9. Click on the newly created invoice (Test).

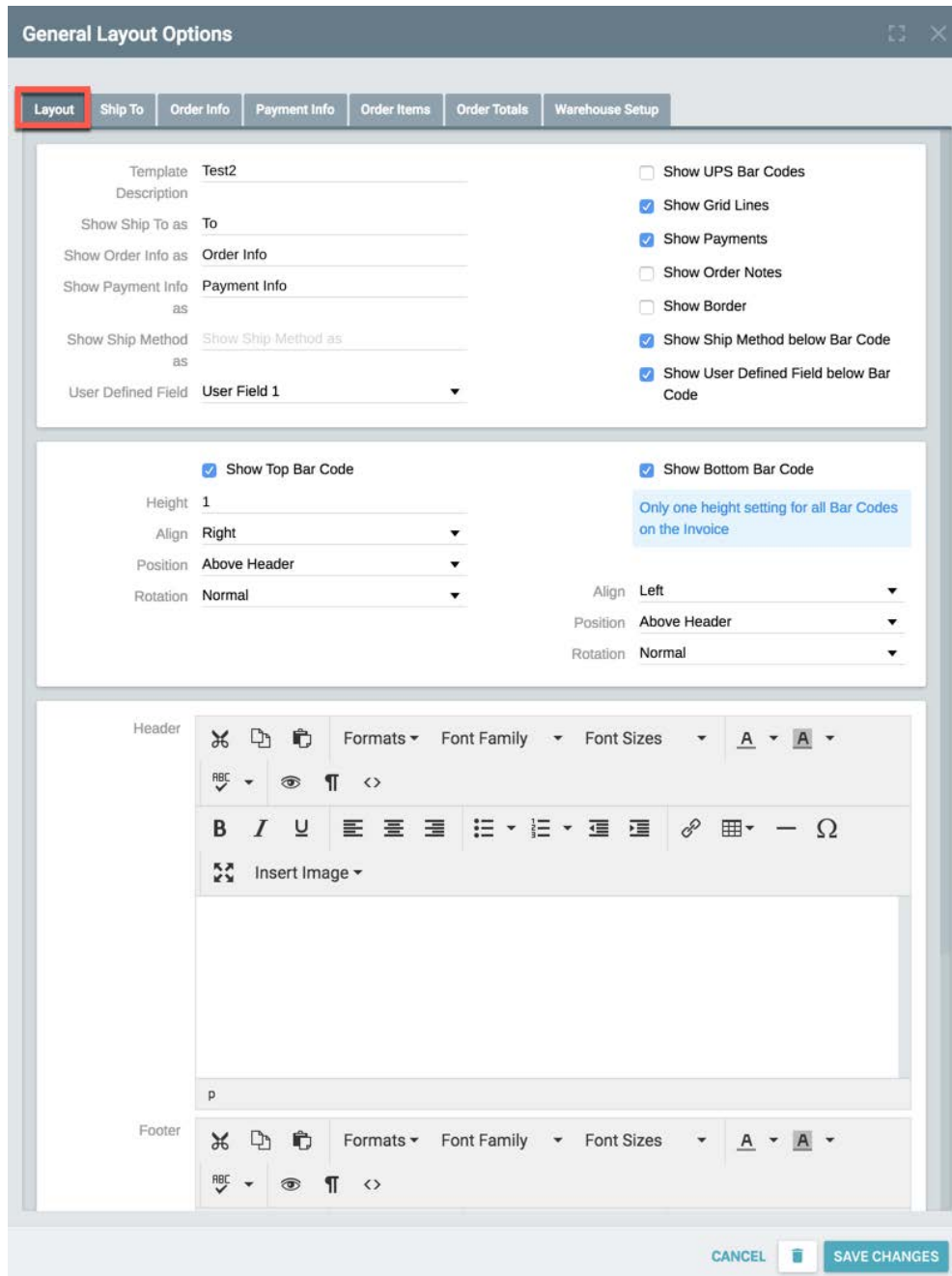


The screenshot displays the 'Accounting Settings' page in the Exigo system. The left sidebar contains navigation options: Home, Customer, Accounting, Administration, Users, Settings, Company News, and Security Templates. The main content area is divided into several sections:

- Accounting Details:** Shows 21 items in the company, next customer and order numbers, and item code generation settings.
- Customer:** Includes a table for customer transactions (Manual Payment, Credit, Enabled) and options to modify settings.
- Warehouses:** Lists a default warehouse and provides a link to modify settings.
- Shipping:** Contains a table of shipping methods (UPS Ground, UPS Express) and links to modify settings.
- Merchant:** Shows no merchants defined and links to modify settings.
- Tax Integrations:** Shows no tax integrations yet defined and a link to modify settings.
- Price Type:** Lists retail, preferred, wholesale, and employee price types.
- Recurring Order Frequency:** Set to Monthly.
- Dynamic Kit Categories:** Includes a link to modify categories.
- Invoice & Statement Setup:** This section is expanded to show a list of templates. The 'Test' template is highlighted with a red box. Below the list is a link to 'ADD INVOICE STATEMENT TEMPLATE'.

TO SET UP A BASIC INVOICE TEMPLATE:

1. Click on the Layout Tab.



General Layout Options

Layout | Ship To | Order Info | Payment Info | Order Items | Order Totals | Warehouse Setup

Template Description: **Test2**

Show Ship To as: **To**

Show Order Info as: **Order Info**

Show Payment Info as: **Payment Info**

Show Ship Method as: **Show Ship Method as**

User Defined Field: **User Field 1**

Show UPS Bar Codes

Show Grid Lines

Show Payments

Show Order Notes

Show Border

Show Ship Method below Bar Code

Show User Defined Field below Bar Code

Show Top Bar Code

Show Bottom Bar Code

Height: **1**

Align: **Right**

Position: **Above Header**

Rotation: **Normal**

Align: **Left**

Position: **Above Header**

Rotation: **Normal**

Only one height setting for all Bar Codes on the Invoice

Header

Formats | Font Family | Font Sizes | A | A

ABC | Eye | T | <>

B | *I* | U | [List Icons] | [Link Icon] | [Table Icon] | [Unlink Icon] | [Omega Icon]

Insert Image

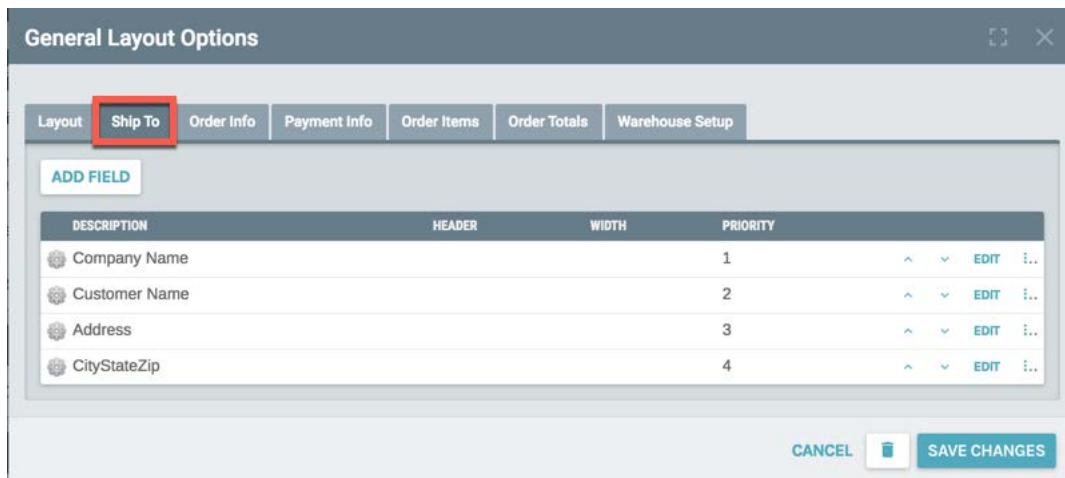
Footer

Formats | Font Family | Font Sizes | A | A

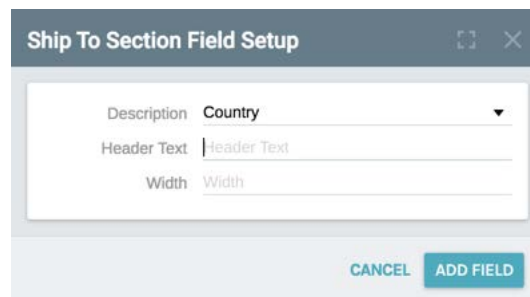
ABC | Eye | T | <>

CANCEL | SAVE CHANGES

2. The top two sections are pre-populated with the most common settings.
3. The Company information such as logos, contact information, slogans, etc., may be inserted into the Header and/or Footer sections. Common editing options are available to edit fonts and the display.
4. Click on the Ship To Tab.



5. This section contains the Ship To Address information displayed on the invoice. The most common fields are pre-populated.
6. To add another field, Click "ADD FIELD".
7. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
8. Click "ADD FIELD".



9. To Delete any field, Click the Vertical Ellipses then Click Delete.

DESCRIPTION	HEADER	WIDTH	PRIORITY			
Company Name			1	^	v	EDIT 
Customer Name			2	^	v	EDIT i..
Address			3	^	v	EDIT i..
CityStateZip			4	^	v	EDIT i..

10. Click on the Order Info Tab.


11. This section contains the basic Order Information such as Order Number, Customer Name, and Contact Information. The most common fields are pre-populated.

General Layout Options [Close]

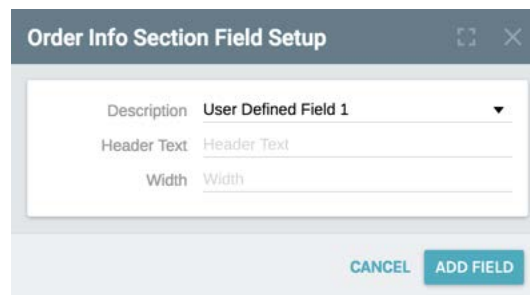
Layout | Ship To | **Order Info** | Payment Info | Order Items | Order Totals | Warehouse Setup

ADD FIELD

DESCRIPTION	HEADER	WIDTH	PRIORITY			
Order Number	Order No.:		1	^	v	EDIT i..
Order Type	Order Type:		2	^	v	EDIT i..
Shipping Method	Shipping Method:		3	^	v	EDIT i..
Customer ID	Customer ID:		4	^	v	EDIT i..
Customer Name	Customer Name:		5	^	v	EDIT i..
Sales Tax ID	Sales Tax ID:		6	^	v	EDIT i..
Date	Date:		7	^	v	EDIT i..
Email	Email:		8	^	v	EDIT i..
Phone	Phone:		9	^	v	EDIT i..
Created By	Created By:		11	^	v	EDIT i..
Fulfilled By	Fulfilled By:		12	^	v	EDIT i..

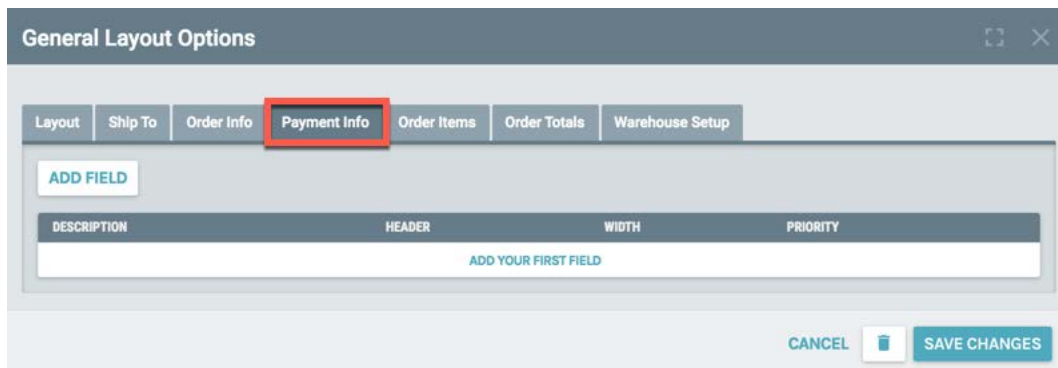
CANCEL  SAVE CHANGES

12. To add another field, Click "ADD FIELD".
13. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
14. Click "ADD FIELD".



The dialog box is titled "Order Info Section Field Setup". It contains three input fields: "Description" with a dropdown menu currently showing "User Defined Field 1", "Header Text" with the value "Header Text", and "Width" with the value "Width". At the bottom right, there are two buttons: "CANCEL" and "ADD FIELD".

15. Click on the Payment Info Tab.
16. This section contains the order payment information.

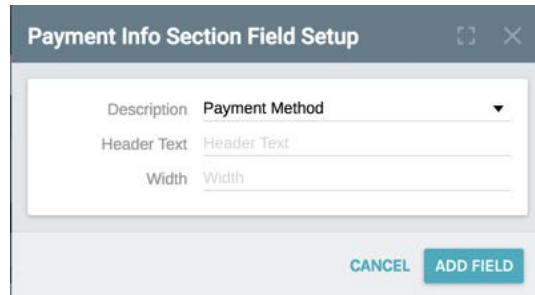


The dialog box is titled "General Layout Options". It has a tabbed interface with tabs for "Layout", "Ship To", "Order Info", "Payment Info", "Order Items", "Order Totals", and "Warehouse Setup". The "Payment Info" tab is selected and highlighted with a red box. Below the tabs, there is an "ADD FIELD" button. Underneath is a table with the following structure:

DESCRIPTION	HEADER	WIDTH	PRIORITY
ADD YOUR FIRST FIELD			

At the bottom right, there are three buttons: "CANCEL", a trash icon, and "SAVE CHANGES".

17. Click "ADD FIELD".
18. Use the dropdown list to choose available fields.
19. Click "ADD FIELD".



Payment Info Section Field Setup

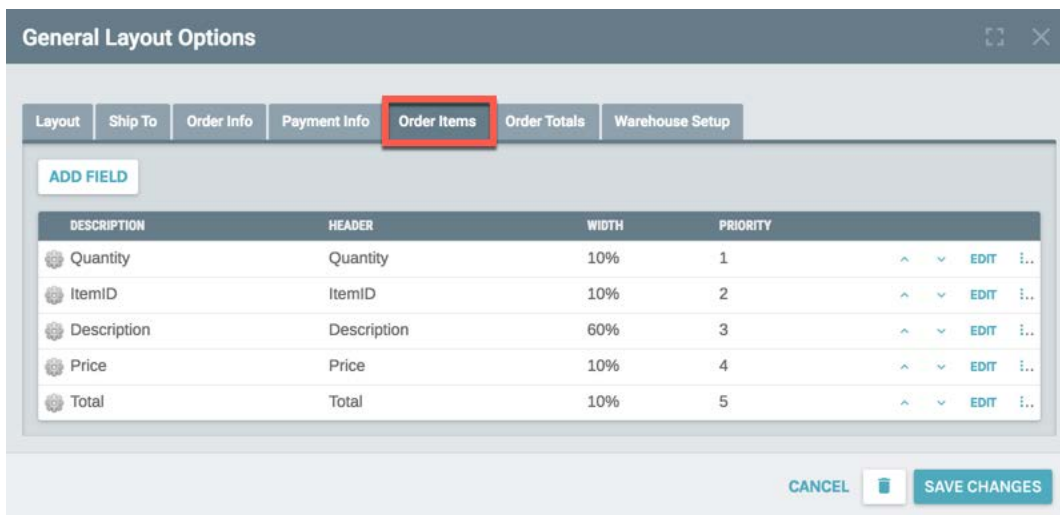
Description: **Payment Method** (dropdown)

Header Text:

Width:

CANCEL **ADD FIELD**

20. Click on the Order Items Tab.
21. This section contains the product detail from the Order. The most common fields are pre-populated.



General Layout Options

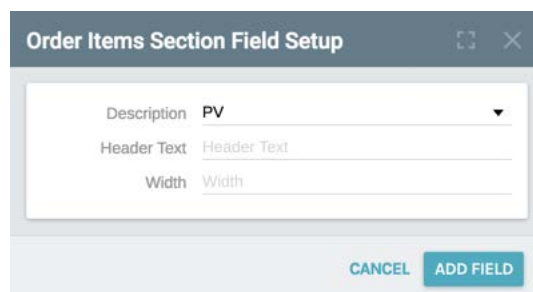
Layout | Ship To | Order Info | Payment Info | **Order Items** | Order Totals | Warehouse Setup

ADD FIELD

DESCRIPTION	HEADER	WIDTH	PRIORITY			
Quantity	Quantity	10%	1	^	v	EDIT i..
ItemID	ItemID	10%	2	^	v	EDIT i..
Description	Description	60%	3	^	v	EDIT i..
Price	Price	10%	4	^	v	EDIT i..
Total	Total	10%	5	^	v	EDIT i..

CANCEL **SAVE CHANGES**

22. To add another field, Click "ADD FIELD".
23. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
24. Click "ADD FIELD".



Order Items Section Field Setup

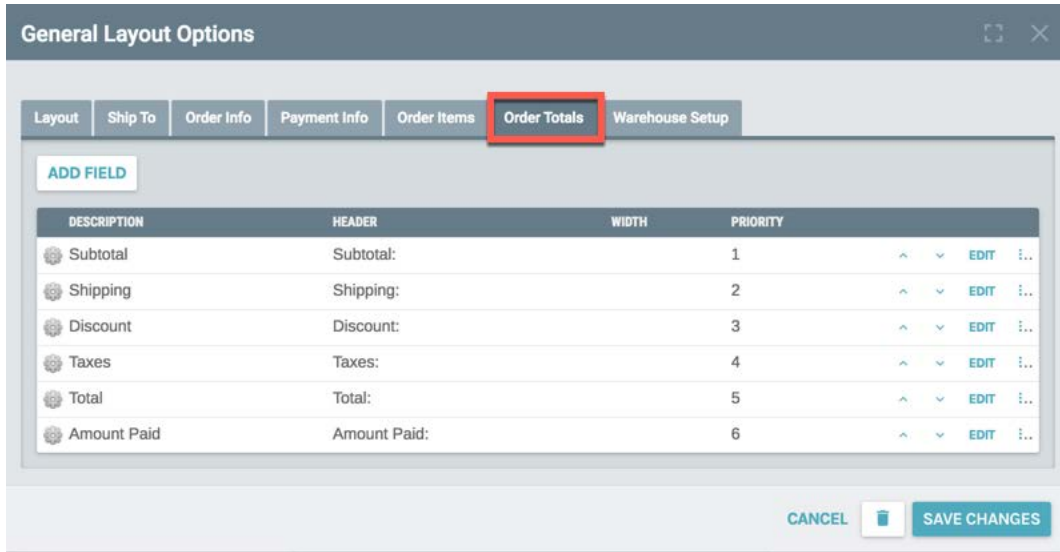
Description: **PV** (dropdown)

Header Text:

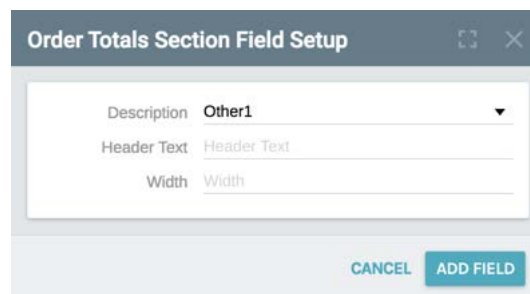
Width:

CANCEL **ADD FIELD**

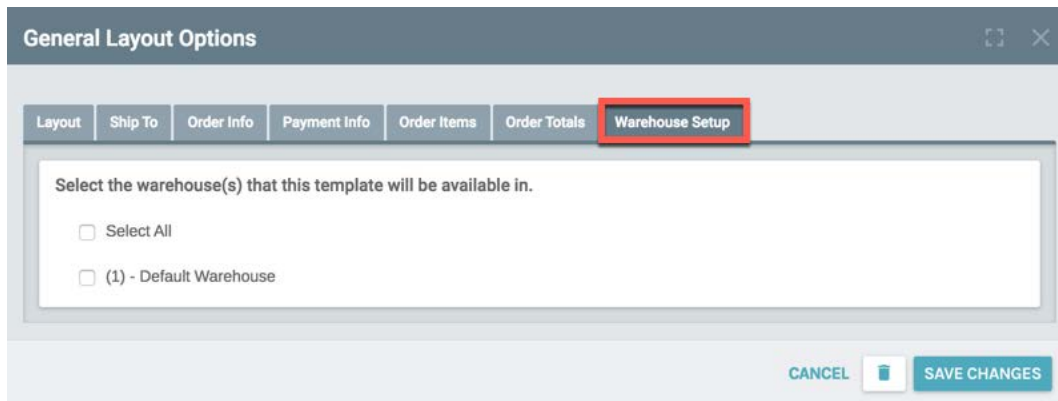
25. Click on the Order Totals Tab.
26. This section contains information about the totals, taxes, and shipping for the Order. The most common fields are pre-populated.



27. To add another field, Click "ADD FIELD".
28. Click Drop Down arrow on the Description field to display a list of all available fields for this section.
29. Click "ADD FIELD".



30. Click on Warehouse Setup Tab.
31. From the list, choose the Warehouse or multiple Warehouses to which this template will be made available. A template can only be used at a specific Warehouse if that Warehouse is selected here.



The screenshot shows a dialog box titled "General Layout Options" with a close button in the top right corner. Below the title bar is a horizontal tabbed interface with the following tabs: "Layout", "Ship To", "Order Info", "Payment Info", "Order Items", "Order Totals", and "Warehouse Setup". The "Warehouse Setup" tab is highlighted with a red rectangular border. The main content area of the dialog contains the instruction "Select the warehouse(s) that this template will be available in." followed by two radio button options: "Select All" and "(1) - Default Warehouse". At the bottom right of the dialog, there are three buttons: "CANCEL", a trash can icon, and "SAVE CHANGES".

32. Click "SAVE CHANGES".