

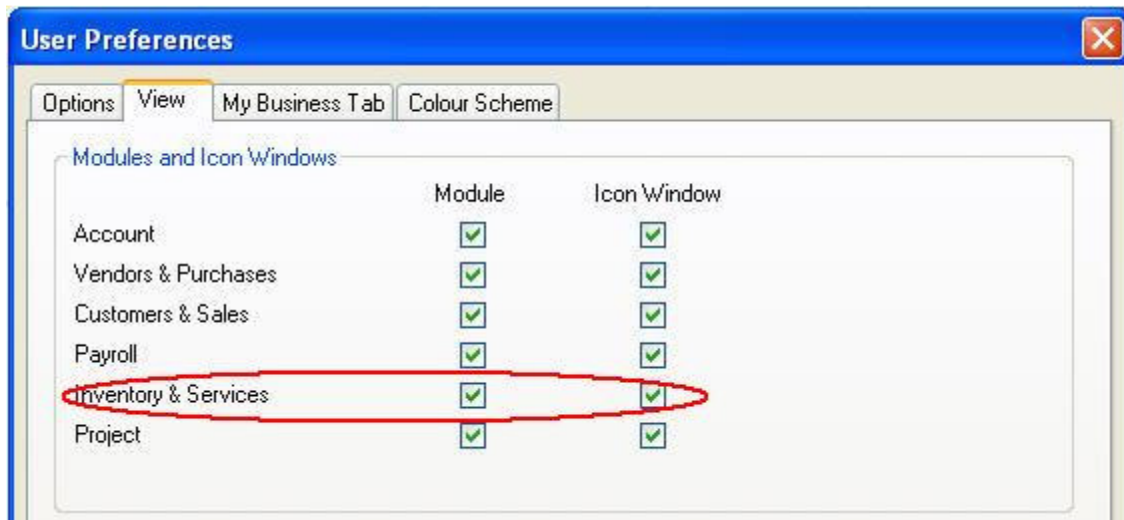
Speeding up Invoice Creation in Simply Accounting

One way to cut down the amount of time you spend creating invoices for your customers, is to use some of the features in Simply Accounting's Inventory module. Even if you do not have inventory in the traditional sense, you can use these features.

A. Getting Started

First, if the inventory module is not visible, you need to make it show up on your screen,

In Simply Accounting, select *Setup / User preferences* and click on the *View* tab.



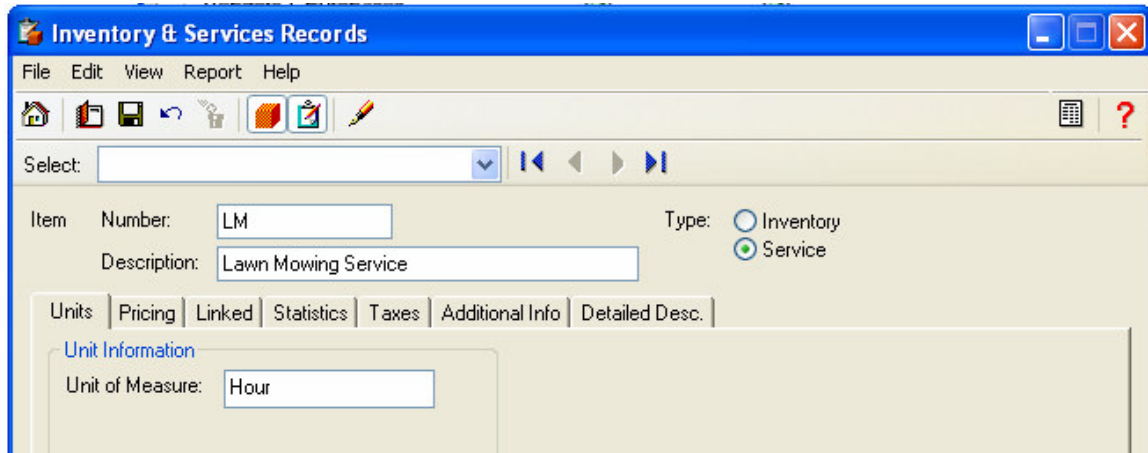
Click on the two check boxes after *Inventory and Services* and close the window.

If you have not used the Inventory and Services module before, the "inkwell" may be displayed. Assuming you have no "real" inventory to track, you can turn the History mode off. Make sure no other modules have "inkwells" and select *History / Finish entering history*.

B. Setting up “items”

Now, we will use the inventory module to create a basic price list. For example, let’s say you regularly bill out lawn mowing services at \$25 per hour plus GST.

Click on the *Inventory and Service* icon and then on the *Create New icon* .



Select the *Service* button.

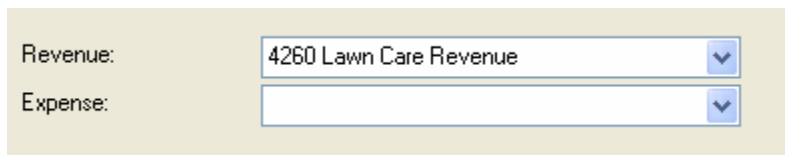
Enter an easy-to-remember item “number” and the description you would like on your invoices

Put in an appropriate unit of measure.

Click on the *Pricing* tab and enter your price per unit. In this case, 25 dollars per hour.

Price List	Price per Selling Unit
Regular	25.0000
Preferred	25.0000
Web Price	25.0000

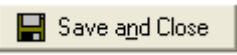
Then click on the *Linked* tab.



Here we only need to select the revenue account you wish to use.

The final setup step is to select the *Taxes* tab. If this service is exempt from one of the taxes you usually charge, make that change here.

Tax	Tax Exempt
GST	No
PST	Yes

Now click on  and we are ready to use our new “item.”

Note: you will repeat the steps above for additional items as needed.

C. Invoicing with the new “items”



Open *Sales Orders and Quotes*.

Sales, Orders &
Quotes

Select the customer as usual.

Change the invoice date if required.

Item	Quantity	Order	B/D	Unit	Description	Price	Amount	Tax	Acct
LM	2			Hour	Lawn Mowing Service	25.00	50.00	GP	4260 Lawn Care Rev

In the *Item* column, type the code you made up earlier and press **Tab**. In the quantity column type the number of, in this case, hours and **Tab** again.

The rest of the information is filled out for you, so you are now ready to print and save the invoice.

Of course, you can edit the price or description on an invoice if you wish.

You can also add more text by clicking in the Description column and typing additional details:

Item	Quantity	Order	B/D	Unit	Description	Price	Amount	Tax	Acct
LM	2			Hour	Lawn Mowing Service Front and Back lawns at 207 Heather St.	25.00	50.00	GP	4260 Lawn Care Rev

Of course you can add more “items” from your list, or additional lines of the same item with descriptions in between.

D. Reporting

As an added bonus, you can get reports on your sales of each of these services.

Select *Reports / Inventory and Services / Sales*. Click buttons beside *All Items* and *Selling Units*. Choose a date range and click on *OK*.

Inventory and Services Sales Detail Report Jul 01, 2014 to Apr 30, 2015

Date	Customer	Source	JE#	Quantity	Unit	Revenue
LM Lawn Mowing Service						
Apr 30, 2015	Brown, Jerome B.	17935	J563	2.0000	Hour	50.00
Apr 30, 2015	Village Realty	17936	J564	3.0000	Hour	75.00
				5.0000		125.00

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