

CG Invoicer 3 Windows



www.CGInvoicer.com

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CG Invoicer 3 Windows

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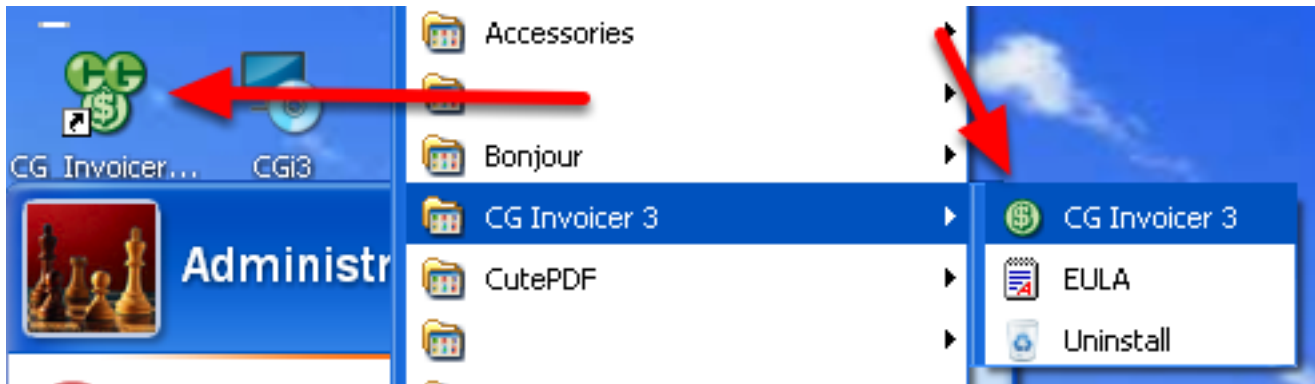
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Setup and Getting Started

Get Started and Print an Invoice CG Invoicer 3 Windows

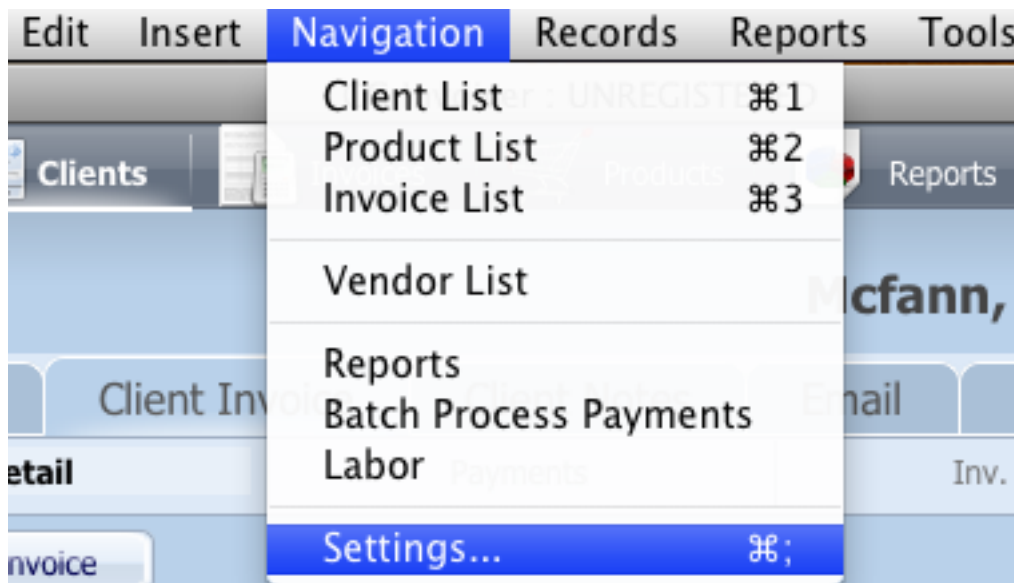
Instructions for your first use. Setting up preferences and create and print your first invoice.

Open CG Invoicer 3



Select the CG Invoicer 3 application from the program files on the start menu or double clicking the CG Invoicer icon on the desktop.

Create your settings



For the first time use you will want to customize CG Invoicer. Start by going to the Preferences. From the Navigation menu select "Settings"

Enter your company information

CG Invoicer 3 Settings

How Things Look How Things Work Tools Re

Setup Header Footer Pr

Invoice Header Text

Company Name **CG Software LLC**

Address 818 Dutch Hill Road
Oakdale, PA 15071

Phone (412) 831-1219

E-Mail support@cginvoicer.com

Web www.cginvoicer.com

Invoice Header Logo

Logo Graphic

Insert Image

← →

samples ▶▶▶

Cut

Copy

Paste

Font

Size

Style ▶ Plain Text

Text Color ▶ Bold

Enter your company name, address, phone, etc. This is the information that will print (optionally) as the header for your invoices. You can highlight and right click (control click) text to change font, style, size, etc.

Customize Header

Invoice Header Logo

Logo Graphic

Insert Image

← →

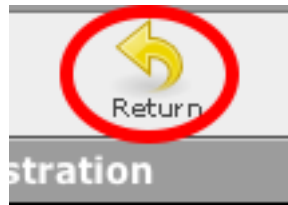
samples

570 x 110 max

Print Header

Click Insert Image button to insert your logo or use the arrows to select a sample image.

Return to the main screen



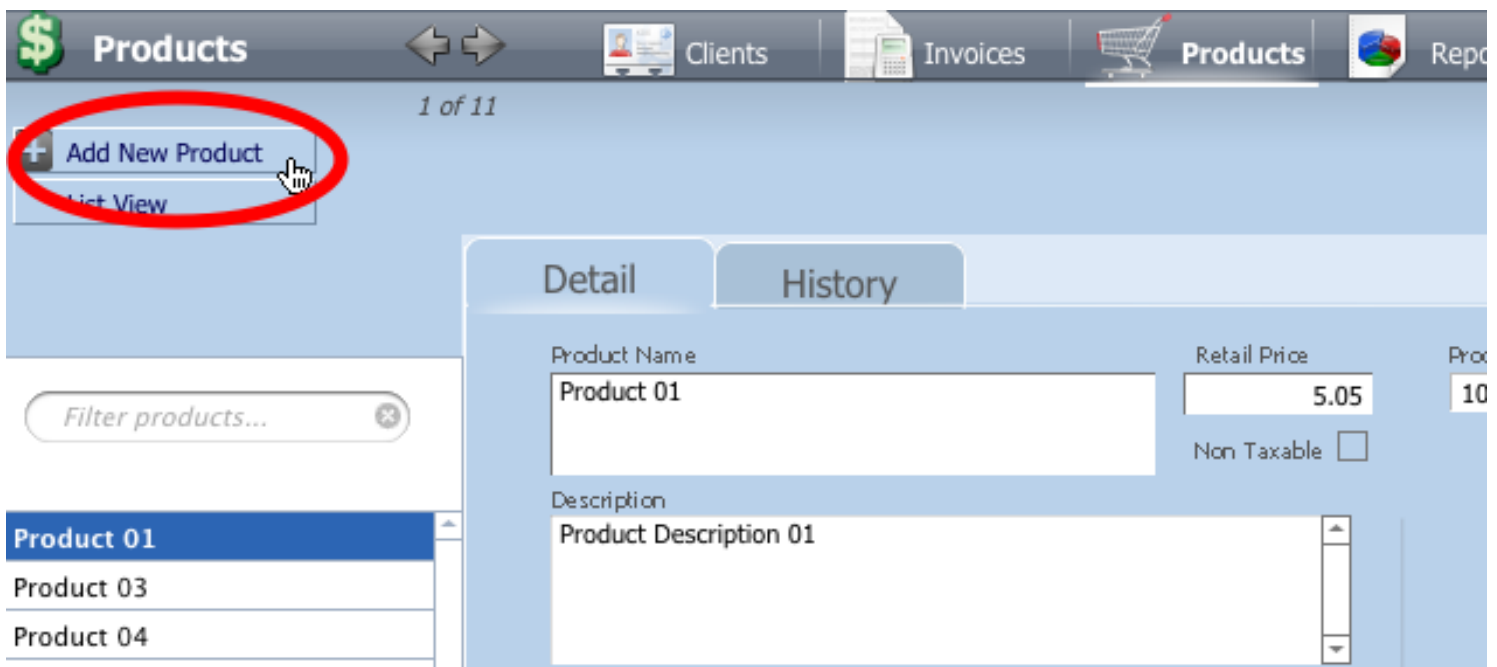
Click the "Return" button in the upper right corner of the screen. There are lots of other options but you can set those up later.

Go to the Products section



Click the Products tab to go to the Products Section.

Add a new product



Add a new product by clicking the "Add" button. Enter the relevant information, you must enter a product name and product ID. All other information is optional. The Product Name will drop into the invoice line item when selected. You can also modify the product name on the invoice without having it change in the Product section.

Go to the Client Section



Click the Clients tab and then click the Add button to add a new client.

Enter client information

The screenshot shows the client information entry form. At the top, there are tabs for 'Address', 'Client Invoice', 'Client Notes', and 'Email'. The 'Address' tab is selected. The form contains the following fields:

- Client Name: Portia Mcfann
- ID: 1
- Company: Beachcomber Realty
- + Add Address button
- Address: 4891 Pacific Hwy
- City: San Diego
- Country: CA
- Zip: 92110
- Is above address for:
- Additional data to print: Include Company Name, Include Contact Name, Include Company & Contact Name

Enter the client name, company and address. Select the "billing" checkbox if the address will be used for sending invoices.

Select additional information to print on the invoice if you would like to have the customer name and / or the company name.

You don't have to save the information. All data is saved as you enter it automatically.

Create an invoice

The screenshot shows the 'Create Invoice' window. At the top, there are tabs for 'Address', 'Client Invoice' (circled with a red '1'), 'Client Notes', and 'Email'. Below these are sub-tabs for 'Detail', 'Payments', and 'I'. A '+ Create Invoice' button (circled with a red '2') is located below the sub-tabs. On the left, there is a list of previous invoices:

Invoices		
1-22	\$4,911.75	
1-20	\$320.00	
1-18	\$13.80	
1-1	\$22,258.69	

On the right, there are form fields: 'Standard' for 'Invoice Style' (with a 'Tear Off S' checkbox), '1-22' for 'Invoice #' and '4/9/2011' for 'Date', and empty fields for 'PO #' and 'Invoice Code'.

Click the "Client Invoice" tab and then the "Create Invoice" button.

Add line item

The screenshot shows the 'Add Line Item' window. At the top left is a '+ Add Line Item' button. At the top right is an 'Item Notes' icon. Below is a table with the following columns: Discount, ID, Description, Price, Quantity, and Ext. Price.

Discount	ID	Description	Price	Quantity	Ext. Price
<input type="checkbox"/>	1003	Product 03	\$100.00	6	600.00
<input checked="" type="checkbox"/>	Product 01	Product 01	\$20.00	15	300.00
<input checked="" type="checkbox"/>	Product 02	Product 03	\$150.00	25	3,750.00
<input type="checkbox"/>	Product 03	Product 04	\$8.00	15	120.00
	Product 04				

A dropdown menu is open over the ID field of the first row, showing options for Product 01, Product 02, Product 03, and Product 04.

When you create a new invoice your first line item is automatically added. Click in the ID field to select a product.

Select your product

ID	Description	Price	Quantity	Ext. Price
1003	Product 03	\$100.00	6	600.00
1001	Product 01	\$20.00	15	300.00
1003	Product 03	\$150.00	25	3,750.00

Select your product from the Drop Down list and change the product description, price and quantity if necessary. Create more line items as needed.

Print Invoice

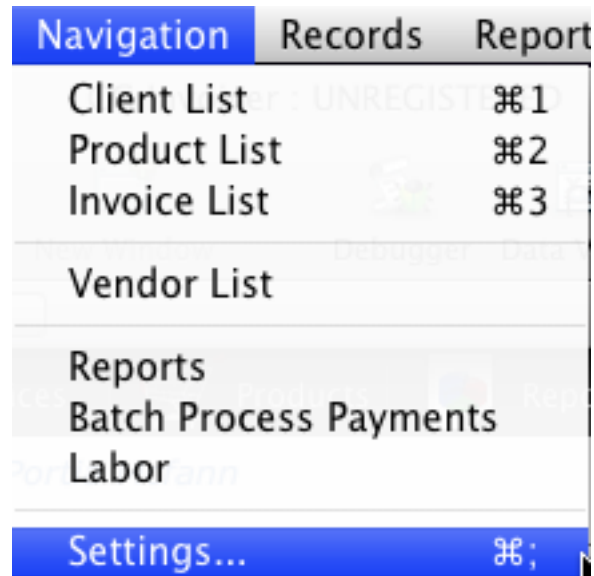
The screenshot shows a software interface with a 'History' tab selected. Below the tab are 'Inv. Notes' and 'Defaults' sections. In the 'Sheet' area, there are three buttons: 'Print Invoice' (with a printer icon), 'Email Invoice' (with an envelope icon), and 'Add A Payment' (with a dollar sign icon). The 'Print Invoice' button is circled in red. Below the buttons are two dropdown menus: 'Paid' (Terms) and 'Estimate' (Type).

Click the Print Invoice button or select Print from the File Menu.

Setting up email

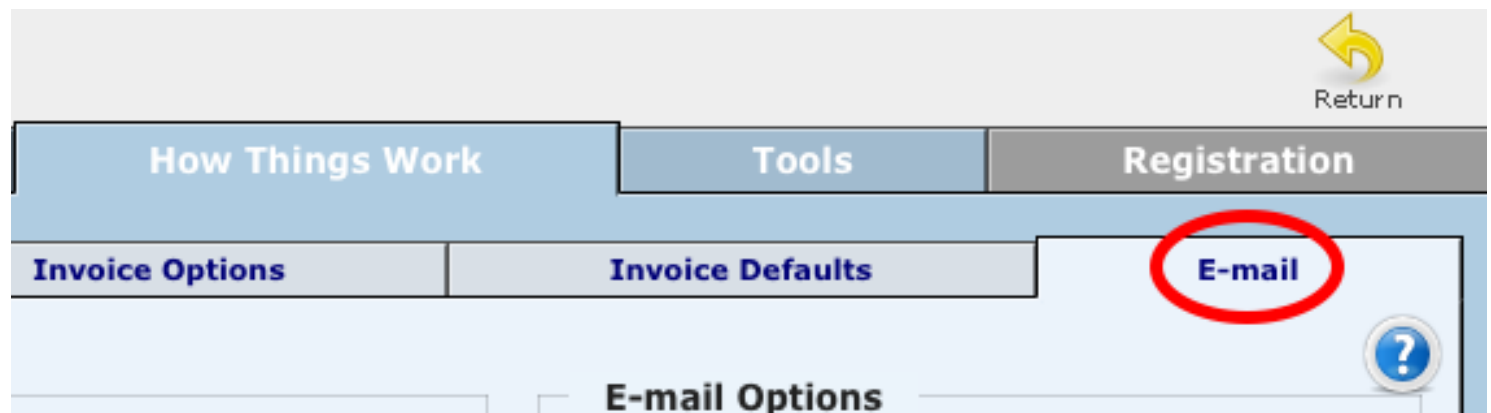
How to set up the email preferences for sending invoices as emails in CG Invoicer 3.

Go to Settings



From the Navigation menu select Settings

Email Tab



Click the How Things Work tab and then the Email tab

E-mail Settings

Name	Your Name		
Email	UserAccountName@mac.com		
Username	UserAccountName		
Password	*****		
POP Auth	LOGIN		
SMTP Auth	Login		
SMTP SSL	On		
Username	YourAccountname		
Password	*****		
POP Server	mail.mac.com	POP Port	995
SMTP Server	smtp.mac.com	SMTP Port	587
SMTP Domain		(only for 'NTLM' auth. type)	

In the name field type your name as you would like receivers to see it.
Replace the "UserAccountName" with your email account name.

Setup for AOL

E-mail Settings

Name	Your Name	
Email	ScreenName@aol.com	
Username	ScreenName	
Password	*****	
POP Auth	LOGIN	
SMTP Auth	Login	
SMTP SSL	On	
Username	ScreenName	
Password	*****	
POP Server	pop.aol.com	POP Port 995
SMTP Server	smtp.aol.com	SMTP Port 587
SMTP Domain		(only for 'NTLM' auth. type)

In the name field type your name as you would like receivers to see it.
Replace the "ScreenName" with your AOL screen name.

Setup for GMail

E-mail Settings			
Name	Your Name		
Email	UserAccountName@gmail.com		
Username	UserAccountName@gmail.com		
Password	*****		
POP Auth	LOGIN		
SMTP Auth	Login		
SMTP SSL	On		
Username	UserAccountName@gmail.com		
Password	*****		
POP Server	mail.gmail.com	POP Port	995
SMTP Server	smtp.gmail.com	SMTP Port	587
SMTP Domain		(only for 'NTLM' auth. type)	

In the name field type your name as you would like receivers to see it.
Replace the "UserAccountName" with your email account name.

Setup for Comcast

E-mail Settings			
Name	<input type="text" value="Your Name"/>		
Email	<input type="text" value="UserAccountName@comcast.net"/>		
Username	<input type="text" value="UserAccountName"/>		
Password	<input type="password" value="*****"/>		
POP Auth	<input type="text" value="LOGIN"/>		
SMTP Auth	<input type="text" value="Login"/>		
SMTP SSL	<input type="text" value="On"/>		
Username	<input type="text" value="UserAccountName"/>		
Password	<input type="password" value="*****"/>		
POP Server	<input type="text" value="mail.comcast.net"/>	POP Port	<input type="text" value="995"/>
SMTP Server	<input type="text" value="smtp.comcast.net"/>	SMTP Port	<input type="text" value="465"/>
SMTP Domain	<input type="text"/>	(only for 'NTLM' auth. type)	

In the name field type your name as you would like receivers to see it.
Replace the "UserAccountName" with your email account name.

Setup for AT&T Broadband(SBC Global)

E-mail Settings

Name	<input type="text" value="Your Name"/>	
Email	<input type="text" value="YourEmail@sbcglobal.net"/>	
Username	<input type="text" value="YourEmail@sbcglobal.net"/>	
Password	<input type="password" value="*****"/>	
POP Auth	<input type="text" value="LOGIN"/>	
SMTP Auth	<input type="text" value="Login"/>	
SMTP SSL	<input type="text" value="On"/>	
Username	<input type="text" value="YourEmail@sbcglobal.net"/>	
Password	<input type="password" value="*****"/>	
POP Server	<input type="text" value="pop.att.yahoo.com"/>	POP Port <input type="text" value="995"/>
SMTP Server	<input type="text" value="smtp.att.yahoo.com"/>	SMTP Port <input type="text" value="465"/>
SMTP Domain	<input type="text"/>	(only for 'NTLM' auth. type)

In the name field type your name as you would like receivers to see it.
Replace the "youemail" with your email account name.

Setup for Yahoo (Plus only)

E-mail Settings			
Name	Your Name		
Email	YourEmail@yahoo.com		
Username	YourEmail@yahoo.com		
Password	*****		
POP Auth	LOGIN		
SMTP Auth	Login		
SMTP SSL	On		
Username	YourEmail@yahoo.com		
Password	*****		
POP Server	plus.pop.mail.yahoo.com	POP Port	995
SMTP Server	plus.smtp.yahoo.com	SMTP Port	465
SMTP Domain		(only for 'NTLM' auth. type)	

In the name field type your name as you would like receivers to see it.
Replace the "youremail" with your email account name.

Setup for Earthlink

E-mail Settings

Name	Your Name	
Email	YourEmail@earthlink.net	
Username	YourEmail@earthlink.net	
Password	*****	
POP Auth	LOGIN	
SMTP Auth	Login	
SMTP SSL	Off	
Username	YourEmail@earthlink.net	
Password	*****	
POP Server	pop.earthlink.net	POP Port 110
SMTP Server	smtpauth.earthlink.net	SMTP Port 587
SMTP Domain		(only for 'NTLM' auth. type)

In the name field type your name as you would like receivers to see it.
Replace the "youemail" with your email account name.

Setup for Hotmail

E-mail Settings			
Name	Your Name		
Email	YourEmail@hotmail.com		
Username	YourEmail@hotmail.com		
Password	*****		
POP Auth	LOGIN		
SMTP Auth	Login		
SMTP SSL	On		
Username	YourEmail@hotmail.com		
Password	*****		
POP Server	pop3.live.com	POP Port	995
SMTP Server	smtp.live.com	SMTP Port	587
SMTP Domain		(only for 'NTLM' auth. type)	

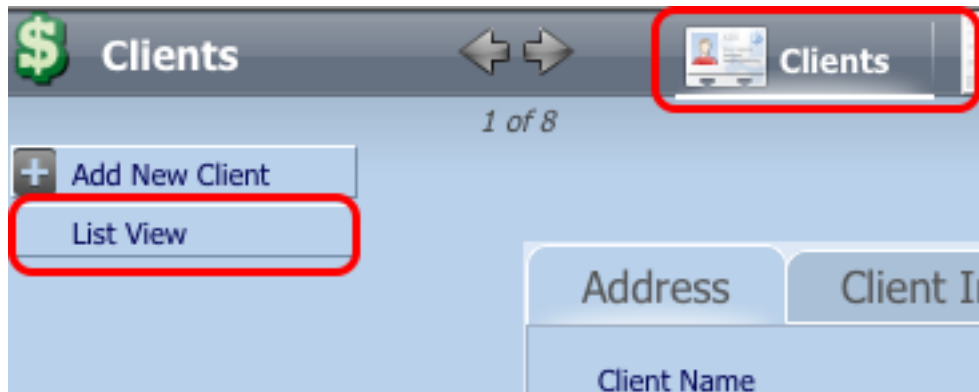
In the name field type your name as you would like receivers to see it.
Replace the "youremail" with your email account name.
You can also use port 25 for the SMTP Port.

CG Invoicer Guides

Create and Print an Invoice (Win)

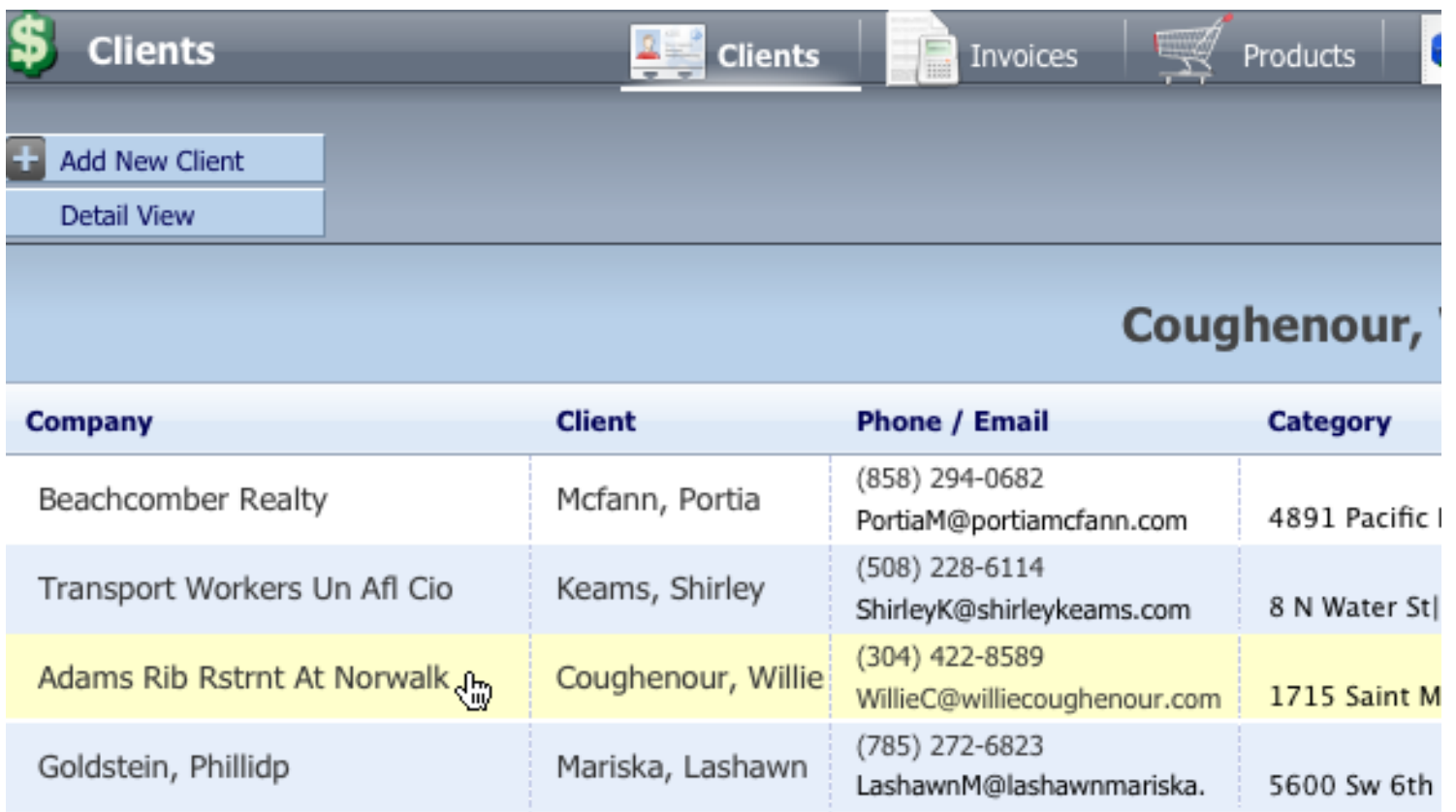
Instructions for your first use. Setting up preferences and create and print your first invoice.

Go to the Client Section



Click the Clients tab and then click List if you are not on the client list

Select a client



Company	Client	Phone / Email	Category
Beachcomber Realty	Mcfann, Portia	(858) 294-0682 PortiaM@portiamcfann.com	4891 Pacific I
Transport Workers Un Afl Cio	Keams, Shirley	(508) 228-6114 ShirleyK@shirleykeams.com	8 N Water St
Adams Rib Rstrnt At Norwalk	Coughenour, Willie	(304) 422-8589 WillieC@williecoughenour.com	1715 Saint M
Goldstein, Phillidp	Mariska, Lashawn	(785) 272-6823 LashawnM@lashawnmariska.	5600 Sw 6th

Click on any client name to view their details

Create an invoice

Coughenour, V

Address Client Invoice Client Notes E

Detail Payments

+ Create Invoice

Invoices

7-9	\$10.35
7-2	\$916.00

Standard Invoice Style

7-9 Invoice # 3/23/2011 Date

Click the "Client Invoice" tab and then the "Create Invoice" button.

Add line item

+ Add Line Item

Discount	ID	Description	Price
<input type="checkbox"/>			
	Product 01		
	Product 02		
	Product 03		
	Product 04		
	Product 06		

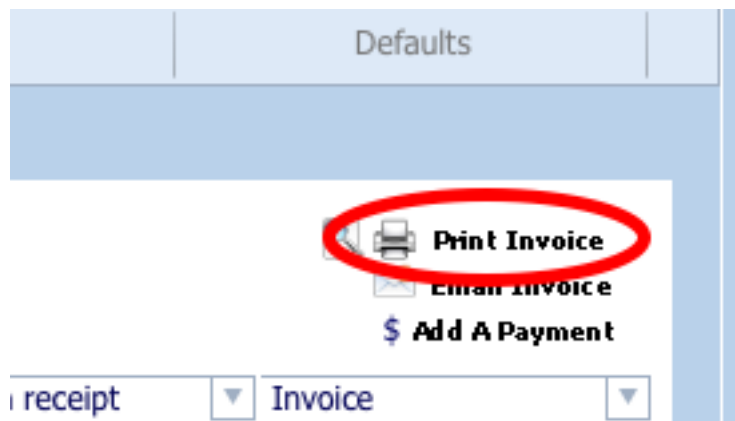
When you create a new invoice your first line item is automatically added. Click in the ID field to select a product.

Select your product

Item				Item Notes
ID	Description	Price	Quantity	Ext. Price
1004	Product 04	\$8.75	1	8.75

Select your product from the Drop Down list and change the product description, price and quantity if necessary. Create more line items as needed.

Print Invoice



Click the Print Invoice button or select Print from the File Menu.

Basics of a Printed Invoice (Win)

Basic sections of a printed invoice

CG Software LLC
818 Dutch Hill Road
Oakdale, PA 15071
Phone (412) 831-1219
E-Mail support@cginvoicer.com
Web www.cginvoicer.com

Bill To:
Mr. Robert Ross
EZ Reply Forms, Inc.
105 Fireside Circle
Baltimore, MD 21212-2417

Ship To:
Mr. Robert Ross
EZ Reply Forms, Inc.
105 Fireside Circle
Baltimore, MD 21212-2417

Date: 7/20/2009
Terms: Due upon receipt
Invoice #: 1-43

Invoice

Date	Product ID	Description	Price	Quantity	Total
7/20/2009	1004	Product 04	8.00	1	8.00
Product Description 04					
7/20/2009	1001	Product 01	0.05	1	0.05
Product Description 01					
<i>Line item note for the current invoice only</i>					
7/20/2009	1008	Product 08	16.00	1	16.00
Product Description 08					
7/20/2009	1010	Product 10	20.00	1	20.00
Product Description 10					
Amount of Sale					44.05
Total					\$44.05

Thank you for your business!

Please tear off and return with payment

Mr. Robert Ross
EZ Reply Forms, Inc.
105 Fireside Circle
Baltimore, MD 21212-2417

Page 1
Date: 7/20/2009
Terms: Due upon receipt
Invoice #: 1-43

Send Payments to
CG Software LLC
818 Dutch Hill Road
Oakdale, PA 15071

Order Balance \$44.05

Check No. _____ Amount Enclosed _____

1 - Header

The screenshot shows the 'Header' tab of a preferences window. It is divided into several sections:

- Company Information:** Fields for Company Name (CG Software LLC), Address (818 Dutch Hill Road, Oakdale, PA 15071), Phone ((412) 831-1219), E-Mail (support@cginvoicer.com), and Web (www.cginvoicer.com).
- Font and Style:** Two rows of settings for different font styles. Both rows are set to 'Times New Roman' font. The first row has 'Bold' checked, 'Condense' unchecked, 'Italic' unchecked, 'Extend' unchecked, and 'Underline' unchecked. The size is 16 and color is Black. The second row has 'Bold' unchecked, 'Condense' unchecked, 'Italic' checked, 'Extend' unchecked, and 'Underline' unchecked. The size is 12 and color is Black.
- Logo Graphic:** A large empty box with the text 'Logo Graphic' and instructions: 'Right Click on the field and select Insert Picture 570x110'.
- Header Position:** Radio buttons for 'Left' (selected), 'Center', and 'Right'.
- Logo Position:** Radio buttons for 'Left', 'Center', and 'Right' (selected).
- Print Header:** A checkbox that is checked.

The header information is set in Preferences. You can enter any address, phone, web information and customize the font, color and style. From Navigation menu select Preferences then click the Header tab.

2 - Bill To

The screenshot shows the 'Add Address' dialog box. It contains the following information:

- Address:** 1715 Saint Marys Ave
- City:** Parkersburg
- State:** WV
- Zip:** 26101
- Country:** (empty field)
- Is above address for:** Billing and/or Shipping
- Additional data to print:** Include Company & Contact Name

The 'Billing' checkbox is highlighted with a red circle.

The Bill To address is set in the Client Address tab by checking the Billing option.

3 - Ship To

+ Add Address

1715 Saint Marys Ave

Parkersburg WV 26101

Country

Is above address for: Billing and/or Shipping

Additional data to print: Include Company & Contact Name

The Ship To address is set in the Client Address tab by checking the Shipping option. This is optional. You can use different addresses for Billing and Shipping.

4 - Line Item Date

CG Invoicer 3 Preferences

Header Footer Email Tools Setup Invo

System Options

Format: **Service**

Professional

Show Address Check to show client address on the Client List view

Tax Options

Show 2 tax fields

The line item date shows when you set up CG Invoicer to create "Service" based invoices. From the Navigation menu select Preferences. Click the Setup tab. Select "Service" in the Format field. If you select "Product" line items will not show dates. If you select "Professional" there will be only one line item per invoice.

If you do NOT want or need a date for each line item then select Product as the format.

6 - Line Item Note

Status: Pending

Item Notes Print Item Notes

Ext. Price	Sales Tax		
1	8.75	<input type="checkbox"/>	<input type="checkbox"/>

You can add a note to each line item on any invoice by clicking the "Item Notes" button. Check the box for "Print Item Notes" to have these notes appear in italics on the printed invoice.

7 - Footer Note

CG Invoicer 3 Settings

Header	Footer	E-mail	Tools	Setup	Inv
Send Payments to			Font		
			Arial		
Footer Note (printed at the very bottom of the invoice)			Font		
Thank you for your business!			Arial		

Enter a note that will appear at the bottom of every invoice. From the Navigation menu select Preferences and click the Footer tab.

8 - Tearoff Sheet

Standard			<input checked="" type="checkbox"/> Tear Off Sheet
Invoice Style			
1-9	3/23/2011	<input type="checkbox"/>	Due upon receipt
Invoice #	Date		Terms

Check the box for Tear Off Sheet to have a tear off added to the bottom of the first page of the printed invoice. You can also set this as a global option in Preferences so that this box will be automatically checked for every new invoice.

9 - Payment Address

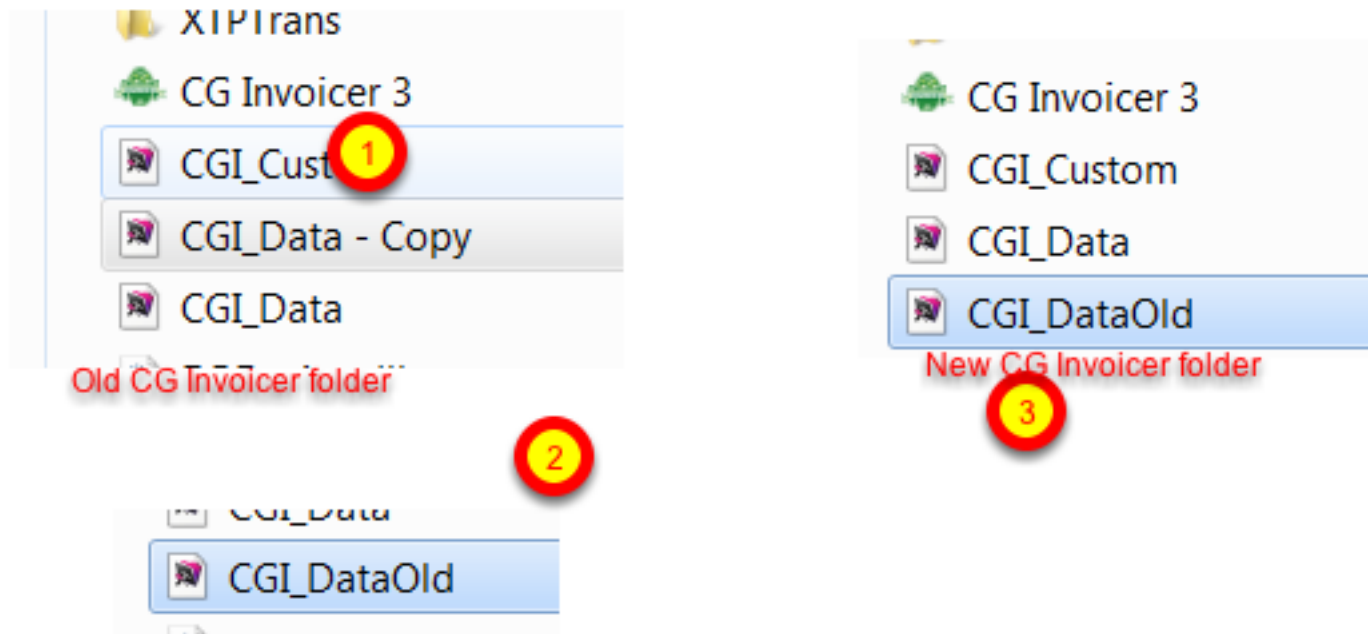


Payment Address can be customized in the Preferences. If you leave the Payment Address blank the address entered in the Header information will be used by default.

Import from a previous version (Win)

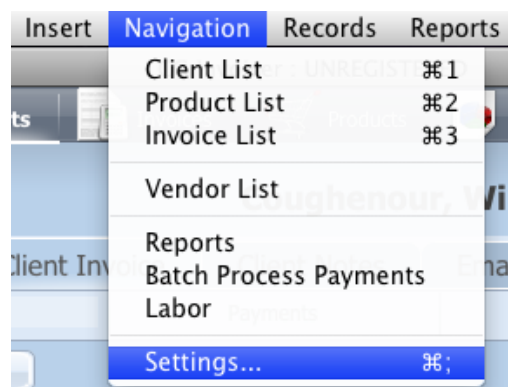
How to import into CG Invoicer

Locate and rename



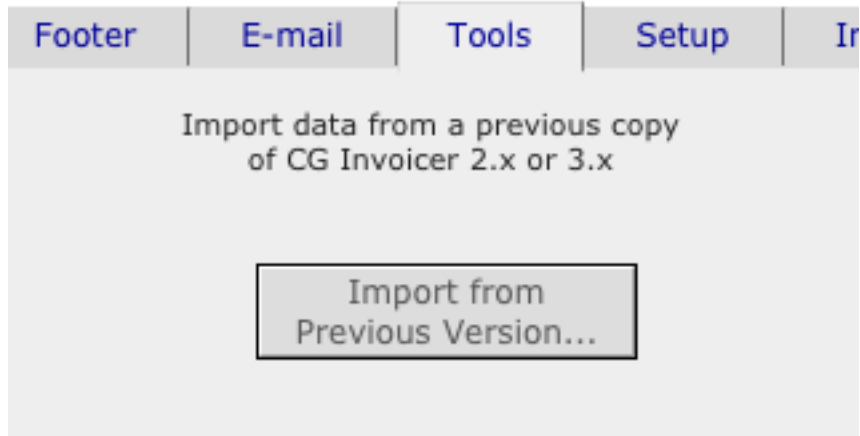
You can import data from one copy of CG Invoicer to another (versions 2 and 3 only) by locating your original CG Invoicer folder on your hard drive and creating a copy of the file named "CGI_Data.cg2". Rename the copy to exactly "CGI_DataOld.cg2" and move this renamed file into the folder of the new copy of CG Invoicer.

Run CG Invoicer 3



Run CG Invoicer 3 and from the Navigation Menu select Settings.

r 3 Settings



Click the Tools tab and then click Import from Previous Version. Then follow the on screen prompts.