

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## QUOTE & INVOICE CENTRE DEMO USER GUIDE

<b>VERSION CONTROL .....</b>	<b>2</b>
<b>CONTACT DETAILS AND HELP .....</b>	<b>2</b>
<b>COMPATIBILITY &amp; SYSTEM REQUIREMENTS.....</b>	<b>2</b>
<b>ABOUT THIS USER GUIDE .....</b>	<b>2</b>
<b>ABOUT QUOTE &amp; INVOICE CENTRE .....</b>	<b>2</b>
1. FULLY MANUAL QUOTATION.....	3
2. PARTIALLY AUTOMATED QUOTATION .....	3
3. FULLY AUTOMATED QUOTATION.....	4
4. CREATE AN INVOICE MANUALLY .....	4
5. CREATE AN INVOICE AUTOMATICALLY .....	4
6. REMIND FOR PAYMENT ON A SINGLE INVOICE .....	4
7. REMIND FOR PAYMENT ON MULTIPLE INVOICES.....	4
<b>INSTRUCTIONS.....</b>	<b>5</b>
1. OPENING AND ENABLING THE APPLICATION .....	5
2. SETTING UP QUOTE AND INVOICE CENTRE.....	7
3. CREATING, SAVING AND RETRIEVING QUOTES .....	9
a) Create a new quote with automatic material calculation .....	10
b) Create a new quote by entering your materials manually .....	11
c) Edit or recreate an existing quote .....	11
d) Validation of your inputs .....	12
e) Creating your quote documentation.....	13
4. CREATING, SAVING, RETRIEVING AND CHASING INVOICES .....	14
a) Create an invoice from a stored quote.....	14
b) Create an invoice from scratch.....	15
c) Edit or recreate an existing invoice .....	15
d) Create a single invoice reminder .....	16
e) Bulk invoice reminders .....	16
f) Mark invoice as paid .....	17
g) Creating your invoice documentation .....	17
<b>OTHER POSSIBILITIES AND FUTURE ADDITIONS.....</b>	<b>18</b>
1. SAVE DOCUMENTATION AS PDF FILES AS WELL AS WORD FILES.....	18
2. CUSTOMER DATABASE.....	18
3. AUTOMATIC E-MAILING OF DOCUMENTATION.....	18
4. ACCOUNTING .....	18
5. WHATEVER YOU WANT.....	18
<b>APPENDIX .....</b>	<b>18</b>
1. HOW DOES THE AUTOMATED QUOTATION WORK? .....	18

# Willeve Office Services

[ian@willeveld.co.uk](mailto:ian@willeveld.co.uk) [www.willeveld.co.uk](http://www.willeveld.co.uk)

## Version Control

Document guide version	1.01
Relating to Application version	1.01
Date created	21 February 2021
Date updated	10 March 2021

## Contact details and help

E-mail	<a href="mailto:ian@willeveld.co.uk">ian@willeveld.co.uk</a>
Website	<a href="http://willeveld.co.uk/">http://willeveld.co.uk/</a>
Facebook	<a href="https://www.facebook.com/WilleveOfficeServices">https://www.facebook.com/WilleveOfficeServices</a>
Application demonstration video	<a href="https://youtu.be/CU1R_GY84a4">https://youtu.be/CU1R_GY84a4</a> (All menu options. Individual menu option videos can be viewed on the website)

## Compatibility & system requirements

This application will function as intended on all 'Ribbon Versions' of the Microsoft Office suite, i.e. 2007 (version 12) onwards. Your operating system should be one of Windows 7, 8, 8.1 or 10. Excel and Word will need to be installed on your computer in order to use this application.

## About this user guide

This user guide is specific to the demonstration application. A customised version will be supplied with your personalised Quote & Invoice Centre.

## About Quote & Invoice Centre

This application is to be used within Microsoft Excel and is designed to make the creation of quotation and invoicing documentation as efficient as possible. Your input is stripped back to the absolute minimum and all quotes and invoices are stored within the workbook which means re-issuing or amending quotes and creating invoices or reminding on unpaid invoices job takes a matter of seconds.

There are three levels of functionality for the quotation part of the application and each is discussed in further detail below:

1. Fully manual material and unit cost input
2. Partially automated material and unit cost input

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## 3. Fully automated material and unit cost input

The first two levels are part of the core software and so minimal configuration (and so minimal cost) is involved in making the application work for you. Level three is considerably more bespoke and so will have a much higher configuration cost, but it could save you a considerable amount of time. A cost/benefit analysis will always be carried out to ensure that you get tangible value from this higher cost.

For this demonstration, I have chosen to create an application for use by Franks Fencing. It is important to remember that I have used fencing purely as an example and the auto quote facility can be programmed to create quotes for any business where the volume of materials is decided by measurements.

There is a materials database that has been set up with some basic fencing supplies and, for demo purposes, it is for one style of fence only. Frank can choose to manually select his materials and either input them directly, along with the unit cost (level one) or he can select his materials from the database via a drop down which will also price the unit (level two). In both cases, the volume of materials required needs to be entered. Alternatively, he can input the length and height of the fence and let the application calculate everything for him (level three). (Obviously fences often have multiple runs, but for demo purposes only one run can be input. A working application can have an unlimited number of runs).

Quotes can also be amended or edited whilst retaining the same quote number.

For invoicing there are four levels of functionality and each is discussed in further detail below:

1. Create an invoice manually
2. Create an automatic invoice using a stored quotation
3. Issue a reminder for a single unpaid invoice (manual selection)
4. Issue bulk invoice reminders (will remind on all unpaid invoices issued before a specified date)

Invoices can also be amended or edited and, of course, marked as paid.

## **1. Fully manual quotation**

When using the fully manual functionality level, each material description is typed in manually as is the unit cost. The total cost of each material (unit cost \* units), the total cost of all materials, the amount of VAT payable and the grand total are all calculated automatically, removing part of the risk of miscalculation from your quote. A deposit amount based on a percentage figure you specify (with the required amount showing exact or rounded to the nearest £1, £5, £10 or any other value as defined by you) is also calculated, along with a balance payable on completion.

## **2. Partially automated quotation**

Functionality level one can be streamlined by adding regularly used materials to the database. These will then appear in the drop down lists on the input form meaning you no longer need to type them in each time. The unit cost will also be drawn from the database meaning you don't have to cross reference in order to price these materials (though you will need to keep the pricing up to date on your database).

All other functionality from level one is available and you can still manually input items and override the pricing if necessary.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## ***3. Fully automated quotation***

In this example, Frank the fencer enters his customer details and the length and height of the fence to be constructed and the application calculates all of the materials required. This makes quoting for a fence of any length and height a 2 minute job.

Whilst this example uses only one type of fencing and calculates just one run of fencing, the application can be expanded to exactly match your requirements, incorporating multiple types of fencing across an unlimited number of runs.

Running at the maximum level of its functionality, the possibilities for efficiency are limited only by your requirements and imagination.

## ***4. Create an invoice manually***

Just like the manual or partially automated quote, when creating an invoice manually each material description will require typing into the input form, along with the unit cost, or the items can be selected from the database using the dropdown (where the database is populated) with the unit cost looked up automatically. The total cost of each material (unit cost \* units), the total cost of all materials, the amount of VAT payable and the grand total are all calculated automatically, the deposit paid on commencement is deducted and the invoice raised for the outstanding balance.

## ***5. Create an invoice automatically***

If you have previously issued a quote, then invoicing on completion of the work is a simple matter. Simply select the quote number from a list and all the information from the quote will be used to compile an invoice in seconds. You will have the opportunity to tweak, such as including additional work or granting discounts.

## ***6. Remind for payment on a single invoice***

If you wish to remind a customer for payment, simply select the invoice from a list and a reminder will be produced. The dates that the original invoice and subsequent reminders were issued is stored so that your letter references these. After 5 reminders, the application will suggest that you recover using other means.

## ***7. Remind for payment on multiple invoices***

If you have multiple unpaid invoices that you wish to remind your customers to pay then there is a bulk reminder facility which allows you to input a date, following which a reminder will be produced for every outstanding invoice that was issued or last reminded on before the date entered.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## Instructions

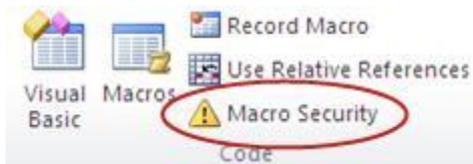
Please follow these instructions carefully in order to get the most out of the Quote & Invoice Centre application.

### 1. Opening and enabling the application

This application is written in Microsoft Excel and uses Visual Basic for Applications (VBA) code to gather and produce the data used to create the quotation and to call the quotation template in Microsoft Word, which also uses VBA code in order to create the final document. Whilst this may not mean much to you, or even interest you, it is important that you have Microsoft Excel and Word set up in a way that allows the code (known as 'Macros') to run.

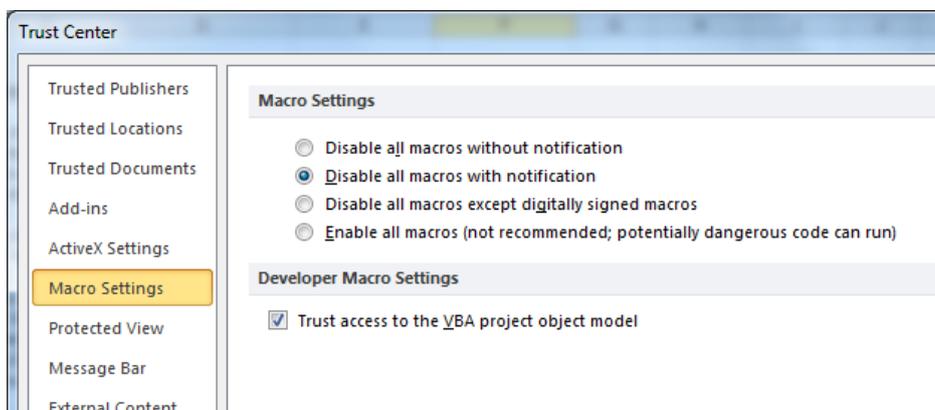
To check (and amend if necessary) your macro security settings (in both Excel & Word):

1. On the Developer tab, in the Code group, click Macro Security



**Note:** If the Developer tab is not shown, display it on your ribbon by:

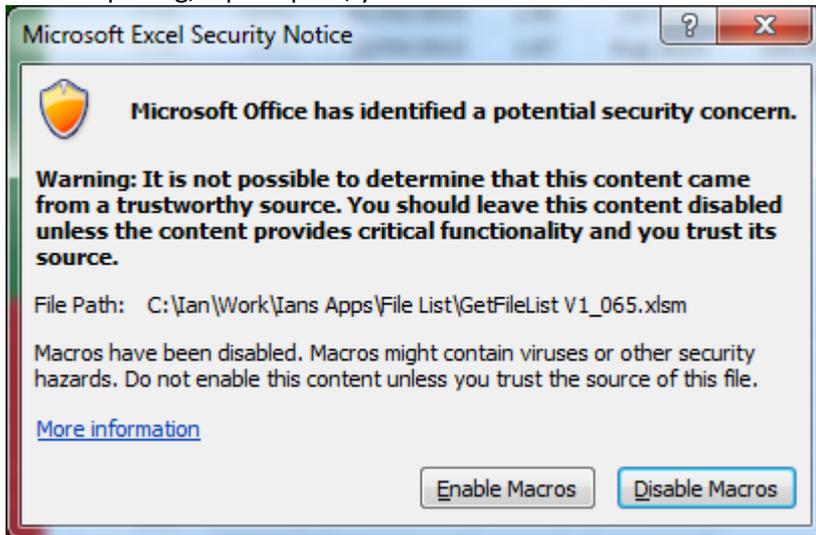
1. Click the File tab, click Options, and then click the Customize Ribbon category.
  2. In the Main Tabs list (on the right of the displayed interface), select the Developer check box, and then click OK.
2. Ensure that your macro settings are as below (or to 'Enable all macros', though this isn't recommended). 'Disable with notification' means that Macros will be automatically disabled, but you will get a notification whenever you open a new Excel file that contains Macros, giving you the opportunity to enable or disable.



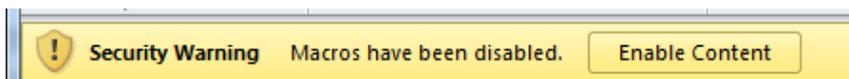
# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

3. When opening, if prompted, you should 'Enable Macros'

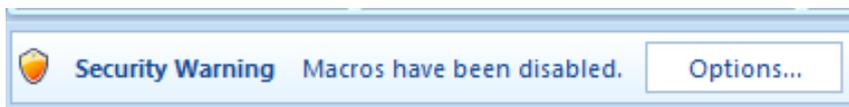


Or the security warning may display between the ribbon and the formula bar, depending on your settings:



In which case, you should click 'enable content'.

In Excel 2007, you may be presented with this message



In which case, you should click options and select 'enable this content'.



You are now ready to set up your application.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## 2. Setting up Quote and Invoice Centre

To use the application, there are a few settings that need to be configured and at least six files are required. Don't worry, we will normally do all this for you before delivering the application, so this is really just for your information.

The settings can be found on the 'Settings' tab of the main file, highlighted in yellow, and the information should be input as follows:

1. **Directory:** This is the directory on your computer where the application and associated files are stored. It is populated automatically each time the application is opened
2. **Office:** This is the directory on your computer where the Microsoft Office program files are stored. It is populated automatically each time the application is opened
3. **VAT Rate:** Enter the current rate of VAT levied, with no % symbol. At the time of writing, the input here is '20'.
4. **Quote Doc:** This is the name of the template document for your quotation. This document will be discussed in part 3c of this document.
5. **Invoice Doc:** This is the name of the template document for your invoice. This document will be discussed in part 3c of this document.
6. **Invoice reminder:** This is the name of the template document for your invoice reminder. This document will be discussed in part 3c of this document.
7. **Bulk Invoice control:** This is the name of the control document for your bulk invoice reminders. This document will be discussed in part 3c of this document.
8. **Data Source:** This is the name of your data source file and will be discussed in part 3b of this document.
9. **Quote Prefix:** When a quote is created, the filename will be a unique sequential number, representing the number of the quote, followed by the customers surname and the date. A further sequential number is added to the end of the name allowing you to create and save 2 or more quotes for the same customer on the same day without having any filename conflict issues. The quote prefix serves no purpose and is purely cosmetic. For my example fictional company, Franks Fencing, I have used 'FFQ', giving a saved quote filename format of **FFQx\_surname\_yyyymmdd\_xx.docx**. For example, if Frank's 126th quote was for Mr Jones on 8 December 2020, the filename would be **FFQ126\_Jones\_20201208\_01.docx**. Documents will be discussed in more detail in part 3c.

It is important to note that once the quote prefix has been set and used once, it cannot be changed unless you archive and clear your quote log.

10. **Items on quote:** This sets the number of potential items to appear on your quote and so on the form which you complete for quotes and invoices.
11. **Deposit round value:** This defines, in conjunction with setting 12, how you wish to round the deposit requested. 1 will round to the whole pound, 10 to the higher/lower/nearest 10 pounds etc.
12. **Round Up/down/nearest:** This defines, in conjunction with setting 11, how you wish to round the deposit requested. If setting 11 is set as 5 and the exact deposit is 232.80 then down will round to 230, up to 235, nearest to 235 and no rounding will retain 232.80.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

	A	B
1	Directory	L:\Ian\Work\Office services\Demo applications\Franks\
2	Office	C:\Program Files\Microsoft Office 15\Root\Office15\
3	VAT Rate	20
4	Quote Doc	Franks Fencing quote.docm
5	Invoice Doc	Franks Fencing invoice.docm
6	Invoice Reminder	Franks Fencing invoice reminder.docm
7	Bulk Invoice Control	BulkInvoice.docm
8	Data Source	Franks Data Source.xlsx
9	Quote Prefix	FFQ
10	Items on quote	10
11	Deposit round value	10
12	Round Up/down/nearest	Down

There are other settings to be configured, but these will be dependent upon what you are using it for (for example, in this demo for a fencer who builds closed board fences, there are settings to define which posts and which featheredge should be used for the height specified and also settings for featheredge wastage, bags of postcrete required per post etc.) so I will not cover these in this generic user guide. There is also a database to be created of all materials that you could possibly include when compiling quotations, and their individual cost. Again, this will be unique to you so will not be covered in a generic user guide. Full instructions for all settings and database completion will be provided for your bespoke application.

The files required are the main application, the data source and the template documents for quotes and invoices. These must all be stored in the same directory on your computer, with sub directories named 'Quotes' & 'Invoices' being created too.

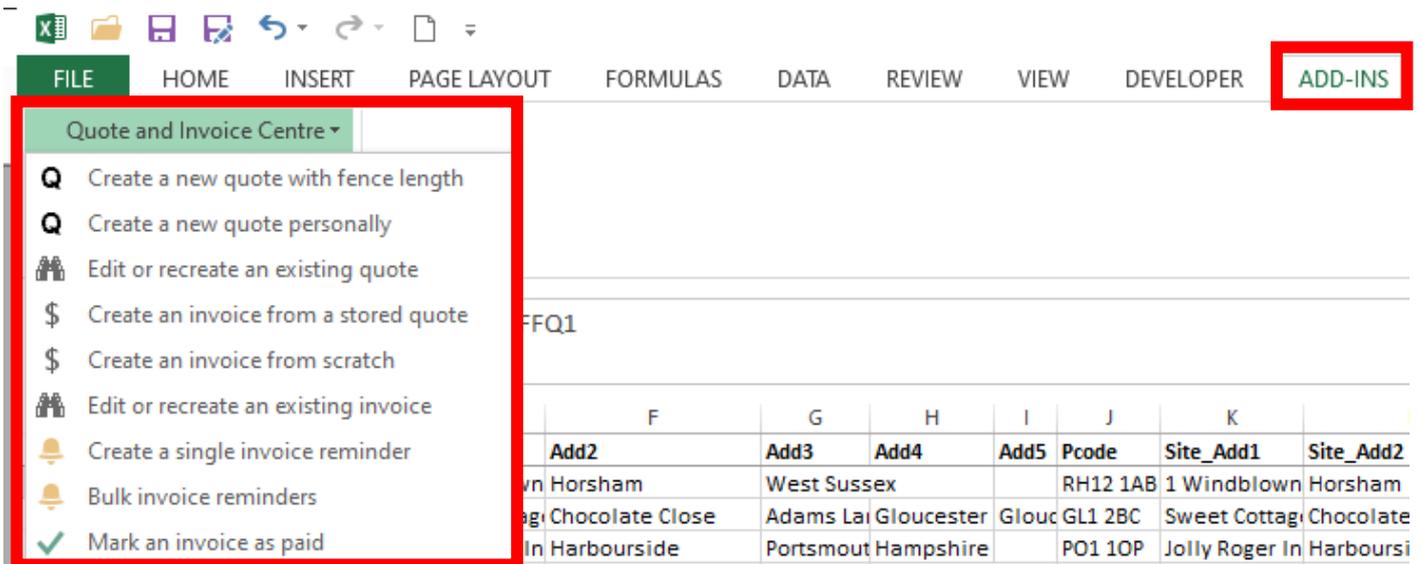
You are now ready to start creating and saving your quotes and invoices.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## 3. Creating, saving and retrieving quotes

To display the Quote and Invoice Centre menu, select the 'Add-Ins' tab and the menu will be displayed. Clicking the menu name will display the options available.



The screenshot shows the Microsoft Excel ribbon with the 'ADD-INS' tab selected. The 'Quote and Invoice Centre' dropdown menu is open, displaying the following options:

- Create a new quote with fence length
- Create a new quote personally
- Edit or recreate an existing quote
- Create an invoice from a stored quote
- Create an invoice from scratch
- Edit or recreate an existing invoice
- Create a single invoice reminder
- Bulk invoice reminders
- Mark an invoice as paid

The background shows a spreadsheet with columns F through K and rows containing data such as 'Add2', 'Add3', 'Add4', 'Add5', 'Pcode', 'Site\_Add1', and 'Site\_Add2'.

Each of the menu options is discussed in detail below.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

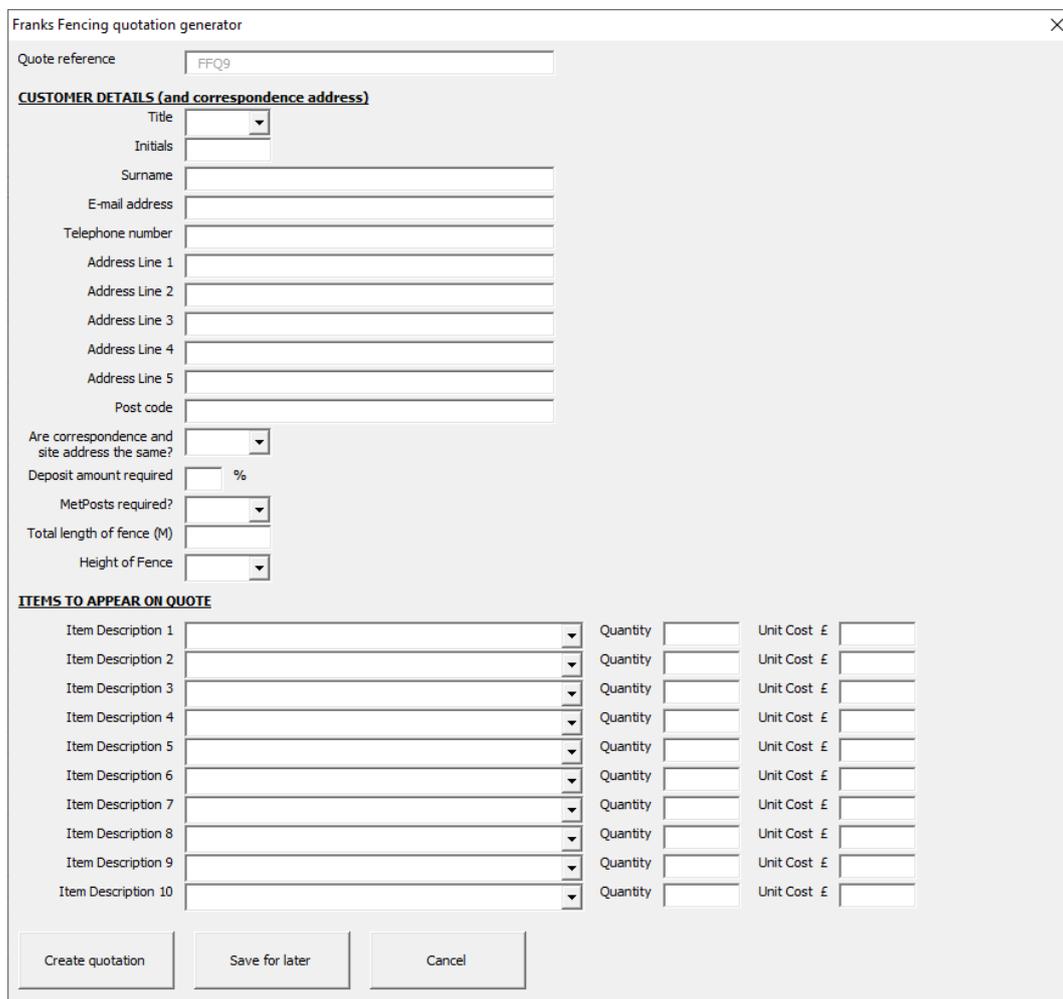
## a) Create a new quote with automatic material calculation

[View a demonstration video here](#)

To create a new quote from scratch where your materials are calculated automatically, click 'Create a new quote with fence length':

 **Create a new quote with fence length**

This will present you with the quote information form, which should be completed as follows:



Franks Fencing quotation generator

Quote reference

**CUSTOMER DETAILS (and correspondence address)**

Title

Initials

Surname

E-mail address

Telephone number

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Post code

Are correspondence and site address the same?

Deposit amount required  %

MetPosts required?

Total length of fence (M)

Height of Fence

**ITEMS TO APPEAR ON QUOTE**

Item Description	Quantity	Unit Cost £
Item Description 1 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 2 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 3 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 4 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 5 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 6 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 7 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 8 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 9 <input type="text"/>	<input type="text"/>	<input type="text"/>
Item Description 10 <input type="text"/>	<input type="text"/>	<input type="text"/>

Create quotation Save for later Cancel

1. **Quote reference:** This is generated automatically.
2. **Title:** Customers title. Select from the dropdown list.
3. **Initials:** Customers initials.
4. **Surname:** Customers surname.
5. **E-mail address:** Customers e-mail address.
6. **Telephone number:** Customers telephone no.
7. **Address Lines & Postcode:** Customers correspondence address.
8. **Correspondence and site address the same:** Many of your jobs will be located away from your customer's correspondence address. Select yes if the job is at the same address, which will

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

automatically populate the site address, or No if the site and correspondence address differ, which will then display fields to into which you will be able input the site address.

9. **Site address lines and postcode:** This will only be displayed if you selected 'No' in field 8 and should be completed with the site address.
10. **Deposit amount required:** If you require the customer to pay a deposit before you order materials and start work, enter the percentage here which will translate into a monetary value on the quote.
11. **Met Posts required:** If Frank wants to use Metposts then he needs to tell the application this so that they are included in the quote.
12. **Total length of fence:** This is what drives the calculation.
13. **Height of fence:** This also drives the calculation, in terms of the height of posts and featheredge to be quoted for, as well as the number of rails (the demo has been set up to use 3 rails on a 6ft fence and 4 rails on an 8ft fence).
14. **Item Description (1 to 10):** These will be automatically populated when both the length and height have been completed and will update if either is changed.
15. **Quantity (1 to 10):** These will be automatically populated when both the length and height have been completed and will update if either is changed.
16. **Unit Cost (1 to 10):** These will be automatically populated from the database information when the item description is updated either by the automatic calculation or manually by Frank.

The application will then calculate the total cost for each entry based on quantity \* unit cost.

You can click 'Create quotation' to proceed and create the quote document, or you can 'Save for later' if you are perhaps waiting on an item cost. Cancel will end the process and your inputs will not be saved.

## b) Create a new quote by entering your materials manually

[View a demonstration video here](#)

To create a new quote from scratch where you enter your materials manually, click 'Create a new quote personally':

 [Create a new quote personally](#)

This will present you with the quote information form, which should be completed in the same manner as advised in part 3, section a) of this document. The only difference is that Frank must now enter the materials and volume of materials himself. If he adds items from the database via the dropdowns then the unit cost will still update automatically, but if he types an item in manually, the unit cost will also need to be entered.

## c) Edit or recreate an existing quote

[View a demonstration video here](#)

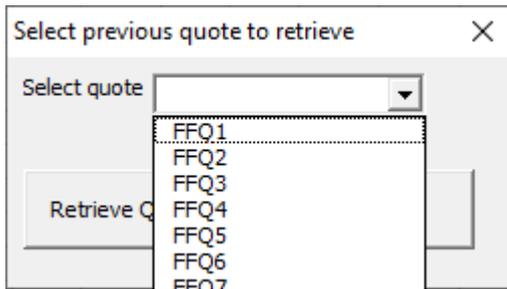
To view a previous quote that you wish to revise or complete, click 'Edit or recreate an existing quote':

 [Edit or recreate an existing quote](#)

This will show a small form with a dropdown list of all quotes. Scroll down to, and select, the quote that you wish to retrieve and then click the 'Retrieve Quote' button:

# Willeve Office Services

[ian@willeveld.co.uk](mailto:ian@willeveld.co.uk) [www.willeveld.co.uk](http://www.willeveld.co.uk)



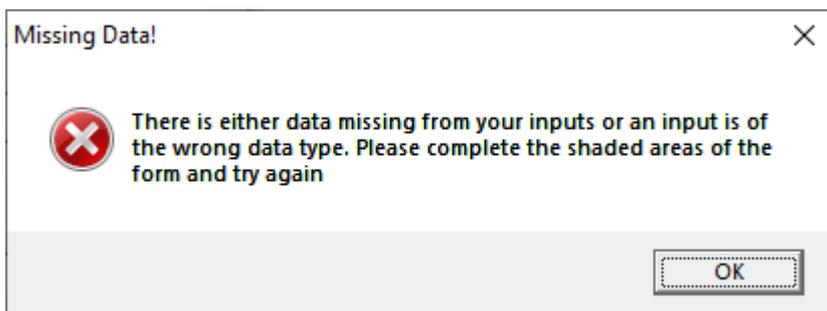
The quote information form will then be displayed, populated with the information previously entered for the quote, which can be added to or amended as necessary and then re-saved or used to create documentation.

The behaviour of the materials section will reflect the way that the quote was initially created – if Frank selected an auto calculation when he first prepared the quote, then any amendment to the height or length will see the materials section update automatically. If a manual quote was selected, then the auto updates will be switched off.

Clicking 'Create quotation' will, from all three menu options, open and populate another spreadsheet, visible on your screen, which will be used as the data source when creating the final documents. Clicking 'Save for later' will store the quote, but will not create the documentation.

## d) Validation of your inputs

As the application performs calculations with your inputs, missing inputs or incorrect data types will cause the program to fail. To prevent this failure, when you click create or save, your inputs will be validated to ensure that they're complete and of the type expected. If an item is completed, but no corresponding quantity or unit cost is specified, or if the unit cost or quantity is not a number, then an error message will appear and the offending inputs will be highlighted. In the example below, Item 3 has a quantity of 'e' instead of 3 and the unit cost of item 6 has been left blank. These can be amended after clicking OK on the notification.



Date inputs will also be checked to ensure that they are valid dates. Dates should always be entered as numbers in the format d m yyyy. E.g. 2021 should be typed as 2021, not 21.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

Franks Fencing quotation generator

Quote reference: FFQ7

**CUSTOMER DETAILS (and correspondence address)**

Title: Mr  
Initials: A  
Surname: Test  
E-mail address: a.test@gmail.com  
Telephone number: 07777 777 777  
Address Line 1: 1 The Lane  
Address Line 2: Off The Street  
Address Line 3: In The Town  
Address Line 4: County  
Address Line 5:  
Post code: AB1 2CD

**SITE ADDRESS**

Address Line 1: 1 The Lane  
Address Line 2: Off The Street  
Address Line 3: In The Town  
Address Line 4: County  
Address Line 5:  
Post code: AB1 2CD

Are correspondence and site address the same? No  
Deposit amount required: 10 %  
MetPosts required? No  
Total length of fence (M): 40  
Height of Fence: 2.4m

**ITEMS TO APPEAR ON QUOTE**

Item Description	Quantity	Unit Cost	£
Post 100*100*2400	18	Unit Cost	13.00
Gravelboard 150*25*2400	17	Unit Cost	4.50
Postcrete Bag	e	Unit Cost	5.00
Rail 2400	68	Unit Cost	4.10
Rail brackets	136	Unit Cost	0.80
Featheredge 100*2400	587	Unit Cost	
Nails (Bag 500)	5	Unit Cost	5.50
Screws (Box 200)	6	Unit Cost	5.00
Labour per post	18	Unit Cost	65.00
		Unit Cost	

Create quotation Save for later Cancel

## e) Creating your quote documentation

Once you have clicked the 'Create Quotation' button and the data source has been automatically populated, the template document will appear on your screen within a few seconds closely followed by the completed document, which will be automatically saved in the previously mentioned 'Quotes' directory with a filename allocated using the naming convention discussed in part 2 of this document.

This is achieved by way of using the mail merge function within Word. The quote builder application will populate a separate spreadsheet from which the mail merge will source its data ('Data Source', as defined within the settings), open your quote document template in Word ('Quote Doc', as defined within the settings) and will then edit the template as necessary before running a mail merge to create the final document. This process requires no input from you whatsoever.

All that remains for you to do is to print, sign\* and post the quote. If you wish to send the quote by e-mail, this can be written into the app so that the quote is sent automatically as a PDF attachment, though certain criteria with regards to your email set up will need to be met first.

\*Scanned signatures can be used in the letters if required

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## 4. Creating, saving, retrieving and chasing invoices

The invoicing part of this application has several features and these are discussed in detail below.

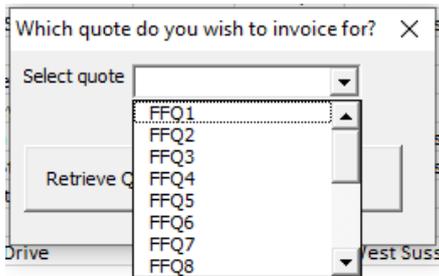
### a) Create an invoice from a stored quote

[View a demonstration video here](#)

To create an invoice instantly from a stored quote click 'Create an invoice from a stored quote'

 **Create an invoice from a stored quote**

This will present you with a drop down list of quotes to select from. Scroll down to the quote you wish to retrieve and click 'retrieve quote'



Franks Fencing Invoice generator

Invoice Number: 2021\_13      Quote Reference: FFQ17

**CUSTOMER DETAILS (and correspondence address)**

Title: Mr |      Initials: A      Surname: Pond  
E-mail address: Alanpond@gmail.com  
Telephone number: 01293 556677  
Address Line 1: 37 Rusper Close  
Address Line 2: Ifield  
Address Line 3: Crawley  
Address Line 4: West Sussex  
Address Line 5:      Post code: RH11 9GT

Are correspondence and site address the same? No  
Deposit Paid £: 180  
MetPosts required? No  
Total length of fence (M): 5  
Height of Fence: 2.4m

**SITE ADDRESS**

Address Line 1: Alan Ponds Garage  
Address Line 2: Ifield Drive  
Address Line 3: Ifield  
Address Line 4: Crawley  
Address Line 5: West Sussex  
Post code: RH11 0EY

**ITEMS TO APPEAR ON QUOTE**

Item Description	Quantity	Unit Cost	£
Post 100*100*2400	4	13.00	
Gravelboard 150*25*2400	4	4.50	
Featheredge 100*2400	120	1.50	
Labour per post	4	65.00	
Nails (Bag 500)	1	5.50	
Screws (Box 200)	1	5.00	
Rail 2400	9	4.10	
Rail brackets	18	0.80	
Postcrete Bag	6	5.00	
Item Description 10			

Create invoice      Save for later      Cancel

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

This will present you with an input form in exactly the same format as the quote form and it will be prepopulated with all the information from the stored quote, along with an automatically generated invoice number. This will normally be in the format of year\_xx, where xx is an incrementing number. Once you have checked your data and made an amendments necessary (maybe there were a couple of add-ons, or something removed from when you originally quoted) then you can click 'Create invoice' which will create and save an invoice document in the same manner of a quote, or you can 'Save for later' and revisit it by using the menu option 'Edit or recreate an existing invoice', see part c), below.

## b) Create an invoice from scratch

[View a demonstration video here](#)

### Create an invoice from scratch

You would use this option if you are invoicing for a job where a quote does not exist in your Quote and Invoice Centre. Perhaps the job was quoted on before you started using the software, or maybe it was a call out with no prior quote. Either way, this is the option to use for a no quote scenario and the form presented will be exactly the same, but will not be pre populated with the job data which will need manually completing, using the database via the dropdowns where the items are stored.

Just as with the invoice created from a stored quote, there will be an automatically generated invoice number and clicking 'Create invoice' will create and save an invoice document or you can 'Save for later' and revisit it by using the menu option 'Edit or recreate an existing invoice'.

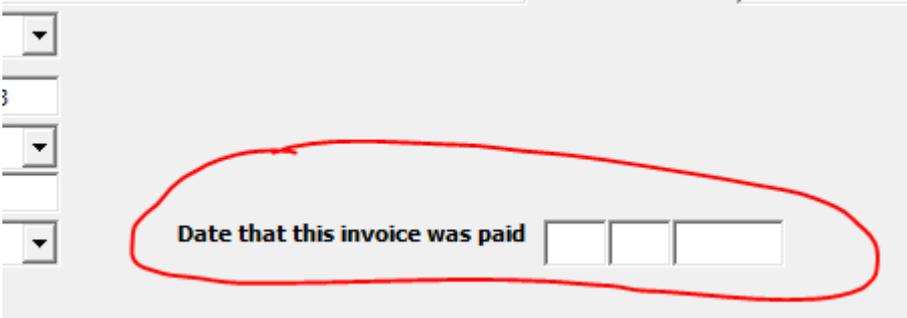
## c) Edit or recreate an existing invoice

[View a demonstration video here](#)

### Edit or recreate an existing invoice

Selecting this option will give you the opportunity to select previously stored invoice data in order to amend and create, or just to create if you had previously only saved. Invoice selection is via a dropdown list. Once you have made any changes you can (re)create an invoice or save again for later use.

Within the form you will be given the opportunity to mark the invoice as paid by entering the payment date. If the invoice is marked as paid, you will not be able to recreate it. This is to prevent the embarrassment of inadvertently reminding a customer to settle a bill that they have already paid.



The screenshot shows a portion of a web form. On the left side, there is a vertical column of four dropdown menus. The main area of the form contains a label 'Date that this invoice was paid' followed by three adjacent input boxes for the day, month, and year. A red hand-drawn oval highlights the label and the input boxes.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

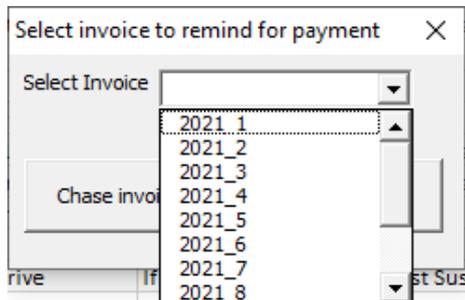
## d) Create a single invoice reminder

[View a demonstration video here](#)

If there is a single invoice for which you wish to remind your customer for payment, then please use this option.

### Create a single invoice reminder

Selecting this option will give you the chance to select from a dropdown list of all outstanding invoices.



Once you have selected which invoice to remind on, you will be presented with the invoice data input form, populated from the previously saved information.

Included on the form will be a note of any previous reminders that may have been issued.

<input type="text"/>	Quantity	<input type="text" value="30"/>	Unit Cost £	<input type="text" value="1.10"/>
<input type="text"/>	Quantity	<input type="text" value="2"/>	Unit Cost £	<input type="text" value="65.00"/>
<input type="text"/>	Quantity	<input type="text"/>	Unit Cost £	<input type="text"/>

**A payment reminder for this invoice was sent on 19/2/2021**

On proceeding to 'Create invoice' a reminder letter and duplicate of the original invoice will be created and saved.

## e) Bulk invoice reminders

[View a demonstration video here](#)

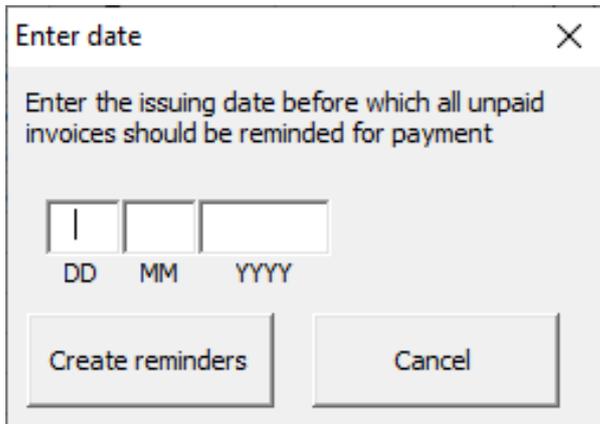
A powerful feature of the Quote & Invoice Centre is the ability to issue bulk unpaid invoice reminders. The process takes you seconds to run – a massive time saver if you have a few unpaid invoices that need chasing.

### Bulk invoice reminders

Selecting this option will give you the opportunity to enter a date. Any unpaid invoices that were issued or last reminded before the date that you enter will have a reminder letter created and saved

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)



The 'Enter date' dialog box has a title bar with a close button (X). The main text reads: 'Enter the issuing date before which all unpaid invoices should be reminded for payment'. Below this text are three input fields for date components: 'DD', 'MM', and 'YYYY'. At the bottom of the dialog are two buttons: 'Create reminders' and 'Cancel'.

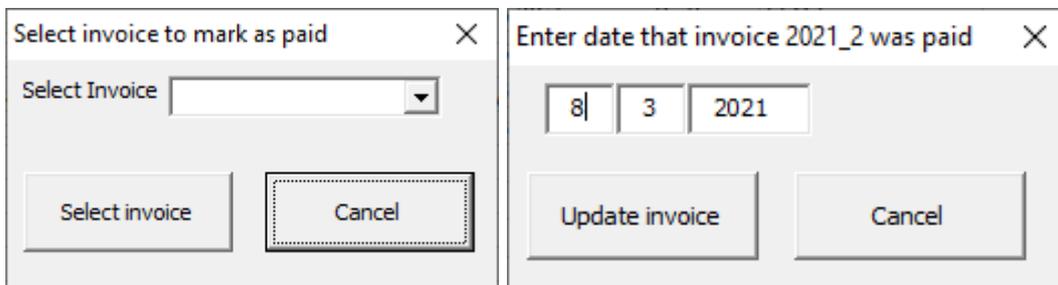
## f) Mark invoice as paid

[View a demonstration video here](#)

In order to avoid potential embarrassment when issuing bulk invoice reminders, it is vital that you mark invoices as paid when you receive payment.

### ✓ Mark an invoice as paid

Selecting this option will give you the opportunity to select the invoice from a drop down list and then enter a date. The form will be prepopulated with today's date, but can be amended if and as necessary.



The first screenshot shows a dialog box titled 'Select invoice to mark as paid' with a close button (X). It contains a 'Select Invoice' dropdown menu and two buttons: 'Select invoice' and 'Cancel'. The second screenshot shows a dialog box titled 'Enter date that invoice 2021\_2 was paid' with a close button (X). It contains three input fields for date components: '8', '3', and '2021'. At the bottom are two buttons: 'Update invoice' and 'Cancel'.

'Update invoice' will update your records.

## g) Creating your invoice documentation

Whereas the quote functionality in the demonstration app only requires one template document, the invoicing requires four documents in total. When creating a new invoice (using either of the two methods), editing a previously saved/issued invoice or when reminding on a single invoice, clicking 'Create Invoice' will start a process to create your documentation that matches that of the quotation stage, that is a data source is populated a template document is called and edited and a merged document is created for issue. For reminders, the 'Invoice Reminder' specified in the settings will be used and for a new or edited invoice will use the document defined by 'Invoice Doc'.

The bulk reminder works slightly differently. The data source will be populated with a line of data for each reminder to be issued and, on proceeding, the application will call the document specified next to 'Bulk Invoice Control' in the settings. This control document then directs the creation of the reminders by looping through each line of data on the data source and creating an individual set of documents for each record.

# Willeve Office Services

[ian@willeveltd.co.uk](mailto:ian@willeveltd.co.uk) [www.willeveltd.co.uk](http://www.willeveltd.co.uk)

## Other possibilities and future additions

### 1. Save documentation as PDF files as well as Word files.

Adding this functionality would be a simple step and will be necessary if you plan to email the created documentation to your customers in case they do not have Microsoft Office. It could also be made variable if required, i.e. it will only create a PDF when you want it to.

### 2. Customer database

If you have regular customers who you quote for or invoice then adding a customer database to the application from which you can draw when creating documentation is a simple step and will save you entering the customer details manually.

### 3. Automatic e-mailing of documentation

Changes can be made so that each document is automatically e-mailed to your customer without you needing to manually address an e-mail and attach the documents. When using a customer database (see above), the preference to email can be set here or, with or without a database, it can be a field on one of the forms that are completed.

### 4. Accounting

If your bookkeeper uses software into which they can load data to smooth the accounting process, then the Quote & Invoice Centre can be adapted to create the necessary load files, reducing your accountancy costs.

### 5. Whatever you want

What do YOU want? This application is designed to liberate you from paperwork, not to enslave you, so tell us what you want and we'll tell you, firstly, if we can do it (the likelihood is that we can!) and, most importantly, whether it will be cost effective for us to do so.

For full details of how the demo application has been configured (and how it *could* be configured) and to understand the possibilities available so that Quote Creator can work for *YOU*, please visit

<http://willeveltd.co.uk/examples.html>

## Appendix

### 1. How does the automated quotation work?

The full functionality of Franks Quote Creator allows him to simply enter the length and the height of the fence he has been asked to construct (along with the customer details of course) and the quote is automatically created for him. **How does this work?** In our example, the material requirements are wholly determined by the length and height of the fence, so the application can be programmed to calculate these requirements without Frank having to sit down with a pen and calculator to work it out himself. With a 100\*1800 featheredge fence, he will be using three 2400 rails and six rail brackets (attached to the posts and rails by sixty screws) between each post. In the same section thirty two pieces of featheredge will sit on a 150\*2400 gravel board, attached to the rails by ninety six nails. The fence required is 12 metres long so, with each section being 2.4 metres, there will be five sections requiring six 100\*100\*1800 posts, six met posts

# Willeve Office Services

[ian@willeveld.co.uk](mailto:ian@willeveld.co.uk) [www.willeveld.co.uk](http://www.willeveld.co.uk)

and nine bags of Postcrete (as Frank has told his Quote Creator that he uses a bag and a half per post). The labour cost is also calculated automatically as Frank charges per post. The same principles are used for a fence using 2400mm featheredge, but Frank uses 4 rails for this height so all materials that depend on the number of rails (brackets, nails, screws and the rails themselves) are adjusted accordingly in the demo.

Franks delivered application will also include the option of quoting for multiple runs because if he is enclosing a back garden, for example, he will have at least three measurements to input. He will also have options to add a percentage mark up to materials and include a wastage percentage for the featheredge. Once the material requirements have been calculated (which is instantly) they are presented in the input form meaning there is an option to adjust them if necessary before creating the quote.

© All text and images are the copyright of Willeve Limited