## Quotes and Invoices

LightSpeed's Quotes and Invoices supercharges your sales cycle with powerful features that allow you to rapidly produce sales documents with minimal effort. With its ability to include images of your Products, Quotes are a powerful tool that you can use to present your products visually to your Customer and have your Quote stand out from your competition's. When your Customer is ready to make their purchase, LightSpeed makes it easy to create a new Invoice or convert an existing Quote or Order to an Invoice with a single click.

The many features common to Quotes and Invoices minimize LightSpeed's learning curve while keeping your information centralized and providing you with a real-time search of Customers and Products, as well as live visual feedback regarding inventory status.
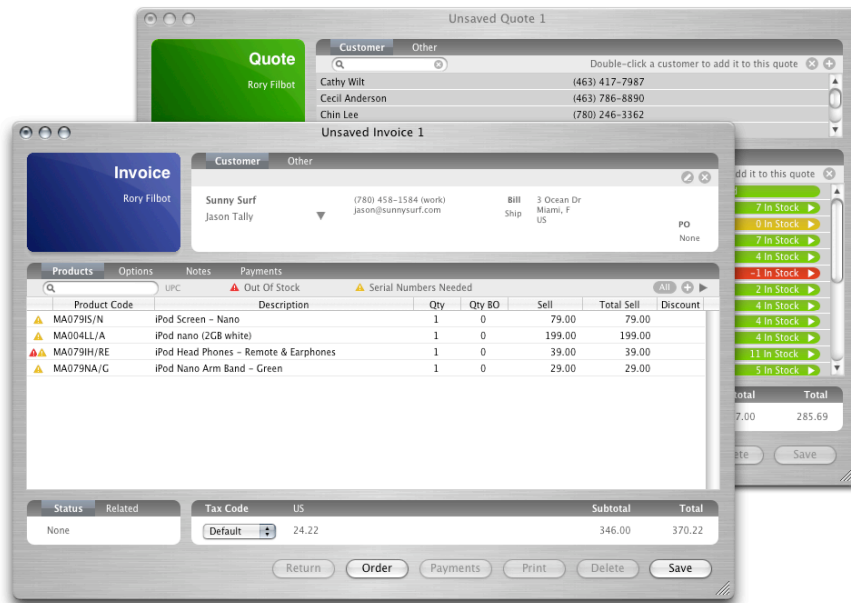


### Common Features

#### Assigning Customers

All sales documents have in common search tools to select Customers and Products. To begin, assign a Customer to the document, either by choosing one from your existing Customers, by creating a new Customer, or by specifying the Customer as a Walk-In.  To choose an existing Customer, you may type a few letters from their name, a few numbers from their telephone number, or by clicking All, and then double-clicking their name from the resulting list.  To create a new Customer, click the "+" icon, enter their information in a new Customer window (see Customers for more info), and click

Save.  When asked if you wish to reload the new information into the document, click OK.  If you do not want to add your client to the Customer database, click Walk-In and include as much or as little information asked as you want, remembering that at least some identification makes later reference of their sales documents easier.
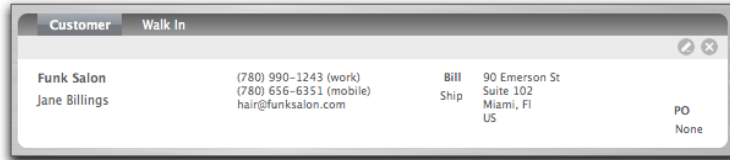


### Adding Products

Among sales documents, the addition of Products is handled in a similar fashion. When the UPC mode is active, you can scan a Product's UPC code to have it added automatically, provided it exists in your database. To activate UPC mode, just click the UPC icon that appears to make sure it becomes red. If you do not have the Product in hand, you may type part of its description or Product Code, or click All, and select it from the resulting list by double-clicking.  If there are Related Products (Products designated as potential add-ons for a primary Product) assigned to this Product, they will also appear in a pop-up menu, and you may add Products by double-clicking them. Use the "x" icon to close the Related Products window.  **Note: You must manually close the Related Products window before proceeding.**
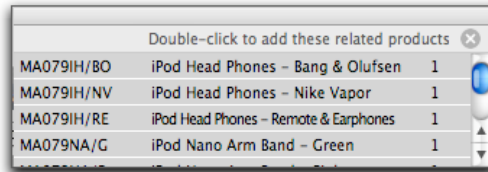


Once the Product has been added to the sales document, you may add another, or edit the item's Quantity or Sell Price.  **Important: On an Invoice, if the Product you add is serialized, you must add the serial number (see Invoicing, below).**

### Discounts and Selling Prices
There are three ways of selling a Product to a Customer for less than its standard Selling Price.  The first is to edit the sell price on the sales document itself.  If the Product has the Editable Selling Price option checked in its profile, you can click the Sell Price field and alter the price by entering a different value. You can also click in the Discount column and discount the Product by dollar amount or by a percentage (using a "%" sign after the value you enter).

The second is if the Product has at least one value entered in the Pricing Levels grid in the Options tab of the Product file.  By having values entered here, an indicator icon will appear beside the Product when it is added to a Quote or an Invoice, and you may then use the pull-down menu to choose the Pricing Level for the Product.  If there are no

values in this grid, the indicator icon will not appear.

The last possibility is to set a Customer Category for your Customer and indicate an across-the-board discount for this Customer's purchases.  To do this, go to Tools|Setup|Customer Categories, and choose an existing category, or create a new one.

### Status

At the bottom of every sales document, there is a Status indicator, which varies depending on the document.  A Quote can be appointed with an Urgent status; a saved Invoice shows a status of Owing, Paid, or Credit, depending on the Payments made to it, and cannot be changed manually.
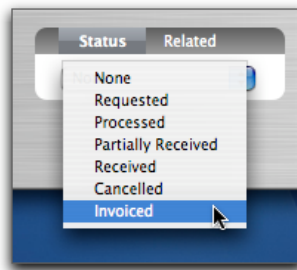


### Related Documents

Each sales document also has a section that lists Related documents, found at the bottom of the window.  For example, if an Invoice is created from an Order, each will cross-reference the other.  The documents listed as related can be called up by clicking on their icon.

### Tax Codes

At the bottom of each document, the Tax Codes are also listed, and these can be changed to charge the appropriate taxes for the region you are selling to.  For example, if you are a company located in Vermont, and you have several shipments to Canadian customers, you can create an alternate Tax Code in the Setup menu and change the taxes charged on an individual Invoice. You will see the Subtotal and Total amounts change when the Tax Code is changed. (see Setups)

### Options

Several choices are available on each sales document that relate to its destination, usually as an Invoice, or just as a printed copy.  These settings can be found in the Options tab.

*Drop Shipment*
By clicking this checkbox, you indicate the Product will be delivered to your Customer, either from your Supplier, a Shipper, or by an employee such as a technician.

*Shipping Method*
This drop-down menu allows you to choose from a customized set of shipping options, or to add a method on-the-fly.

*Currency*
If your Customer is paying in a currency other than what you have set as your default (see Setups), choose it from the pull-down menu.  It should then appear in parentheses behind the word "Total" at the bottom of the document.  To see the converted amount, using the exchange rate you've entered in Setup, you can click on Total once and the amount will appear in the default currency.



**Note: If the current exchange rate is different than the default, you can adjust it on the sales document to reflect the new rate.  This does not affect the rate entered in the Currencies Setup.**

*Print Language*
This is a pull-down menu that allows you to set the language the sales document will be printed in, using the terms defined in the Field Translations setup.

*Print Images*
One of LightSpeed's most effective features is the ability to print Product images on sales documents.  This setting allows you to control the size of the image that is printed, as well as the option of whether or not you prefer to only have the image of the first Product to be printed, and its size.

*Print Discounts*
Clicking this checkbox will enable your Invoices to show which Products were discounted, and for how much, listed as a dollar amount or a percentage.

**Notes**

Using the Notes tab gives you the option to include Notes that will be printed on the Invoice, Quote, or Order, intended for the Customer, or to attach internal Notes intended for Users for later reference. **Note:** Using a combination of the Command and the "=" keys, a timestamp can be entered in every Notes field in Lightspeed which includes the time, date, and the currently logged in User.

**Quoting**

In addition to the Customer and Product procedures common to all sales documents, there are some features that distinguish Invoices from Quotes. Quotes have the basic functions listed above, as well as the ability to become either an Order or an Invoice, depending on the status of your inventory, and what you want to do with it. Once saved, a Quote may be converted to an Order if the Product must be ordered from the Supplier or allocated by your administration, or it can be converted to an Invoice, if the Product is available for sale.
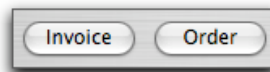


*Deposits*
If a Customer wants to pay a deposit on a Quote, it can be applied to their account using the Deposits tab. As with Payments on an Invoice, different payment methods may be used alone or in combination with each other to apply deposits to the Customer's account. These deposits will appear as credits on the Customer's file, and may be applied in whole or in part on any future Invoice for that Customer until they are used up. Once a deposit payment is applied to a Quote, the printed document will reflect the payment and act as a proof for the Customer's records.

**Invoicing**

*Serial Numbers*
Invoices are structured in much the same way as Quotes, with the additional feature of Payments. However, if you add a serialized Product, the message "Serial Numbers Needed" appears beside the Product search bar along with a gold warning icon signaling the requirement of the serial number(s). You must then enter the serial numbers before proceeding to Payments. To do this, click the Product once, and the message will change to "X serial numbers needed", X being the quantity sold. You are then able to scan the serial numbers using your barcode scanner or enter it manually, hitting Enter after each. The serial numbers should exist in the available inventory, and will be pulled from a list visible by hitting the All button when LightSpeed is asking for serial numbers. If the serial number you are scanning/entering does not exist in

available inventory, you will be warned and may then proceed to selling the serial number for later reconciliation. Once you have entered all the required serial numbers, the warning icon will disappear.

*Backorders*
When you enter Product that is not available, a red warning icon appears beside the Product and beside the Product search bar.  You now have three choices.  You can eliminate the Product from the Invoice by selecting it and clicking the "x" icon or pressing the Delete key.  You can proceed, selling the Product and bringing the quantity of that item into a negative value.  You may also create a backorder for the Product by changing the value in the Quantity column to zero and putting the desired value into the Quantity Backorder column for the amount you wish to Request on an Order.

Once completed, click Save.  You will be asked to confirm if you want to sell any out-of-stock Product you may have on the Invoice, or if your Customer would like to pre-pay any Backorders on the Invoice.  If the answer is yes, the amount owing will be the entire total of all Products on the Invoice, but a credit will appear for the Products that weren't Invoiced at the time of Purchase which can then be applied when those Products arrive and are Invoiced.
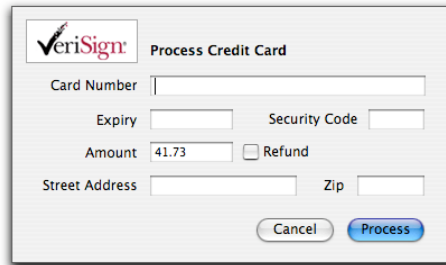
If there are Products to backorder, use the Order button at the bottom of the Invoice, verify the information, and click Save to create a new Order request.

*Payments*
Saving an Invoice assigns it a unique ID that is used for later reference and takes you to the Payments screen. Payments for the Invoice are registered here, including any applicable Credits for the Customer.  To apply a Payment to the Invoice, click the button corresponding to the Method of Payment you have set up in the Tools menu.  The amount tendered will automatically show the balance owing on the Invoice, but this can be edited for partial/split payments.



LightSpeed integrates with VeriSign for fast, simple, accurate processing of credit card transactions.  At time of purchase, you are able to enter the Customer's credit card information and click Process to send the encrypted information to Verisign.  If the transaction fails, you will be notified immediately.  Likewise, if it is successful, a confirmation number will be logged into the Invoice. The Save button must be clicked to register the payment to the Invoice.  LightSpeed will automatically access Verisign for any method of payment specified as "Credit Card" in the Tools|Setup|Payment Methods menu option.
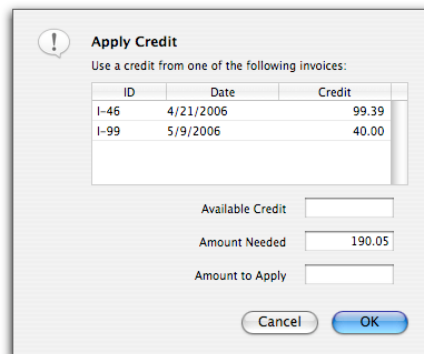
If the Customer is using more than one method of payment, you are able to modify the amount tendered to reflect the division of payment.   Save the payment and click another button for the next payment method.  In some cases, the customer may choose to use the same method of payment, but from a different source – a different credit card, for example, even though they are both Visas.  All of these different payment methods will be reflected separately on the printed Invoice.

Pressing the Save button for a Payment saves it to the Invoice and is irreversible except by authorization by an Administrator.

*Credits*
If the Customer has a credit from a previous Invoice or deposit on Quote/SRO/Order, it can be applied as a method of payment.  Pressing the Apply Credit button will call up a list of all the Customer's available credits.  Choose one and specify how much of it you wish to apply.  If a Customer has more than one credit you need to apply, you must choose each one separately and save it as its own method of payment.  Click OK to return to the Payments view of the POS screen.
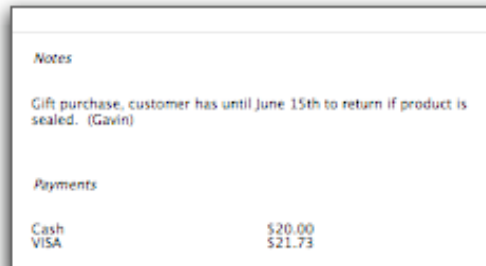


*Printing*
When your Invoice is printed, information you have set up or customized will appear. At the top right, the Invoice number, as well as its barcode equivalent, will appear. Underneath you will find the date the Invoice was created, and the date any modifications were made.

I-109

Created 5/11/2006
Modified 5/11/2006
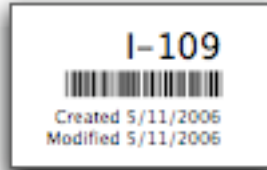
In the Product section, you will see the description, as well as the image stored in LightSpeed's Product database. If you have not selected images to be printed, you will only see the description.

**Description**

iPod Head Phones – Remote & Earphones
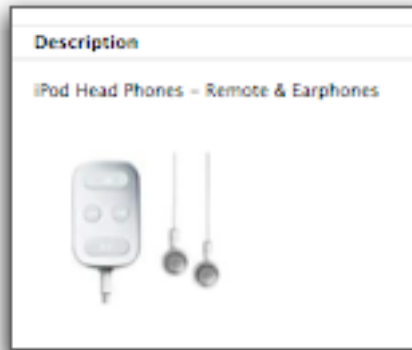
Any notes you have entered in the Printed Notes field will appear after the Products, and below that will be the details on Payment Methods.

*Notes*

Gift purchase, customer has until June 15th to return if product is sealed. (Gavin)

*Payments*

Cash                                $20.00
VISA                                $21.73

At the bottom left of the Invoice, you will see any terms or conditions you have set up in Tools|Setup|Company in the Invoices field.

All sales are final. No refunds or store credits offered.

**Page 1**                        Signature  _____