

Quick Start Guide

STEP 1 How to INSTALL

- **1.** Disable any virus protection software and firewalls on your computer; restart your computer if prompted.
- **2.** We recommend that you update your operating system files before installing VersaCheck® SmartInvoice. Click Start, click Control Panel, and then click Security. Click Check for updates. Download all files recommended by Microsoft® and restart your computer.
- 3. Windows 7 & Vista Users: Insert the CD into your DVD/CD-Rom drive. Click 'Open folder to view files', right-click 'autorun', select 'Run as administrator'.

Windows XP/2000 Users: If installation does not begin automatically, double click on the file autorun.exe on the DVD/CD-ROM.

4. After installation, click the "VersaCheck Smart Invoice" icon on your desktop to launch your program.

User's MANUAL

The complete VersaCheck® SmartInvoice User's Manual is in electronic format and can be found by clicking **Help** on the main menu bar.

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You can also obtain instructions for a specific feature by pressing the F1 key.



1. Set Up Your Accounts

From the 'Getting Started' screen Select Create a New **Account** and then select an account type and complete Getting Started the simple two-step 'Create New Account' wizard.

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2. Set Up Your Address Book

SmartInvoice includes a contact manager that allows you to track all of your customers and vendors in a simple-to-use list. From the 'Address Book' screen click the New icon and enter the contact information. Classify your contacts as bills, business, family, friends, or create your own categories.

Note: You can also import invoice files from Ouicken[®]. OuickBooks®, Money and Others! From the 'File' menu in 'SmartInvoice' select Import and click on Invoices to get started.

How to **CREATE** STEP 3

Invoices, Estimates & Purchase Orders

Invoices, Estimates & PO's can be accessed by clicking the 'Business' menu item at the top of the screen or by clicking the respective folder in the business tab at the left of the screen.



Create Invoices

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Click New Invoice from the 'Business' menu OR open the 'Invoices' folder and click the New button. Customer payments can be easily tracked by selecting the **Apply** Customer Payment option in the 'Business' menu.



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Estimates

Create Estimates

Click New Estimate from the 'Business' menu OR open the 'Estimate' folder and click the New button. You can guickly convert Estimates to Invoices by clicking on an existing invoice and then clicking the **Convert to Invoice** button.

Convert to Invoice.

Create Purchase Orders

Click New Purchase Order from the 'Business' menu OR open the 'Purchase Order' folder and click the New button.



Selecting Vendor's Bills from the 'Business' menu or the 'Vendor's Bills' icon will allow you to track payment on bills and purchase orders.



Create Custom Forms

The Smart Invoice 'Form Designer' allows you to customize and modify the layout of invoices, estimates & purchase orders to fit your needs.

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- **1.** Select the form type you wish to edit by clicking one of the folders in the 'Business' tab.
- 2. Click the New button.
- 3. Click the **Customize** button next to the Form template section at the bottom of the window.
- 4. In the template window that opens, click the **Design** button to open the Form Designer.
- 5. Make any edits or changes to the form and click **Save** from the 'File' menu.

How to TRACK STEP 4

Track Inventory & Shipments

Click Vendor's Bills from the 'Business' menu. Click the **New** button and enter the requested information.

Create Invoice Statements

From the 'File' menu click Print\Customer Statements. Select whether to print a particular customer's statement, all unpaid statements, or overdue statements. Choose the template to use for printing the statement or edit your own and then preview and print.

STEP 5 How to GET PAID

Get paid instantly with Check Drafts & Paypal

Receive Payments by Check Draft

SmartInvoice lets you enter customer check data (provided by your customer via phone, fax or email) and then print a check draft for deposit to your bank!

- 1. Click on Address Book and open an existing or new contact record.
- 2. Select the Financial tab
- Enter the payor's check account information, then click OK.
- 4. To create and print the check draft click on the 'Collect Checks/ Drafts' icon in the 'Business' tab at the left of the screen.
- Select the payor from the drop-down 'Payor' list, then complete the date and amount check fields Collect Checks/Drafts and click on Record.
- 6. Click the Print Checks/Drafts... button and follow the screen instructions.
- 7. Insert a VersaCheck[®] blank check paper form to print the check drafts.

To set up the 'Draft' feature you will need:

-An Approved Merchant Partner (AMP) plan from gValidate.com -Payor accounts validated by gValidate.com

Note:

You can click the Change Settings... button to choose business or personal check forms.

Once printed, the check is ready for deposit!

Schedule Check Drafts

You can easily schedule and automate future or recurring check drafts. Open the 'Bills/Schedule' screen, click the **New** button, then select **Check** Draft from the 'Type' field. Complete the rest of the fields and click **OK**.

Receive Payments by Paypal

SmartInvoice lets you choose between printing, emailing or uploading invoices that you create. For invoices you upload or email you can also choose to direct customers to pay you by integrated Paypal.

- 1. Open an 'Invoice' and check To be uploaded or To be sent and then click Send.
- 2. Choose the **Payment Methods** tab to link to a PayPal account for customer payment.
- 3. Click Send Now to finish.

The invoice will arrive with links that take the customer directly to your Paypal account for making the payment.

How to ORDER SUPPLIES

1 (303) 532-4738 versacheck.com

FORMS & CHECK PAPER: VersaCheck® Security Check Refills Invoice, Estimate & PO Forms



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Bills / Schedule



CHECK & FORM PRINTERS: Loaded with bank compliant Versaink[™]/VersaToner[™]



How to **REGISTER**

Register online instantly & conveniently:

- 1. Open Smart Invoice & Estimates
- 2. Click: Help\VersaCheck Smart Invoice... Registration
- **3.** Follow on-screen instructions

How to **CONTACT**



SALES:	303-532-4738	sales@versacheck.com
SUPPORT:	303-532-4738	versacheck.com/web/support

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