SmartInvoice™ & Estimates Pro X1

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.

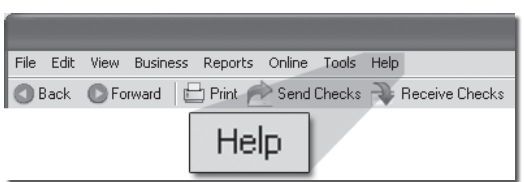
3. **Windows 7 & Vista Users:** Insert the CD into your DVD/CD-Rom drive. Click 'Open folder to view files', right-click 'autorun', select 'Run as administrator'.

   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.

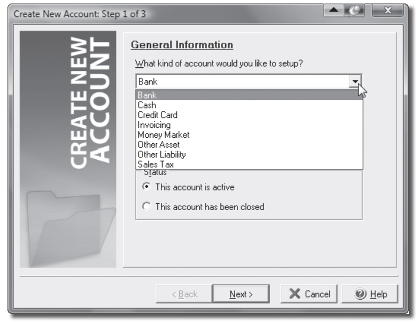


You can also obtain instructions for a specific feature by pressing the F1 key.

STEP 2 How to SETUP

1. Set Up Your Accounts

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



2. Set Up Your Address Book

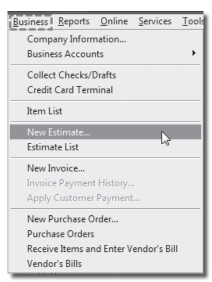
SmartInvoice includes a contact manager that allows you to track all of your customers and vendors in a simple-to-use list. From the **'Address Book'** screen click the **New** icon and enter the contact information. Classify your contacts as bills, business, family, friends, or create your own categories.

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

STEP 3 How to CREATE

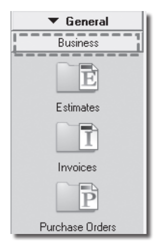
Invoices, Estimates & Purchase Orders

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.



'Business Menu'

OR



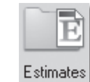
'Business Tab'

Create Invoices

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.

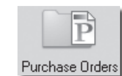
Create Estimates

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



Create Purchase Orders

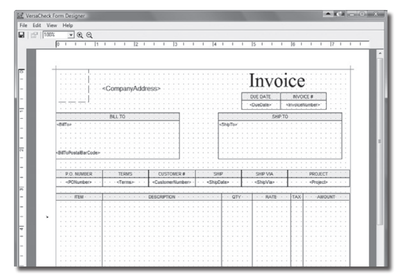
Click **New Purchase Order** from the **'Business'** menu OR open the **'Purchase Order'** folder and click the **New** button.



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.



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.

STEP 4 How to TRACK

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
3. 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.
5. Select the payor from the drop-down **'Payor'** list, then complete the date and amount check fields 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

MAGNETIC INK & TONER:
Magnetic Ink Character Recognition (MICR) Versaink™ and VersaToner™ meet ANSI X9 Check Processing specifications.

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

VersaCheck.com

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