

Invoice 360 Enterprise – Invoice Cloud on your Windows Desktop

Invoice 360 Enterprise

<http://invoicessoftware360.com/invoice360enterprise.html>

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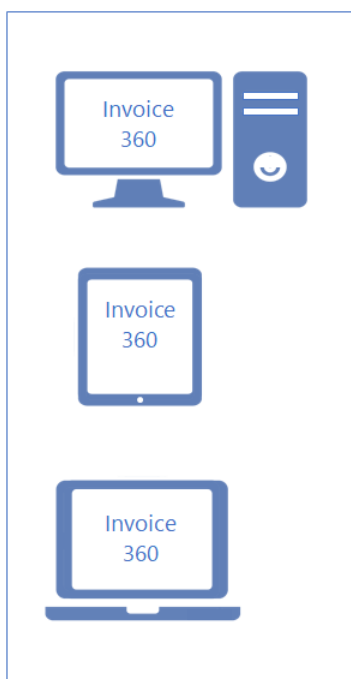
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Invoice 360 Enterprise - Invoice Cloud on your Windows Desktop

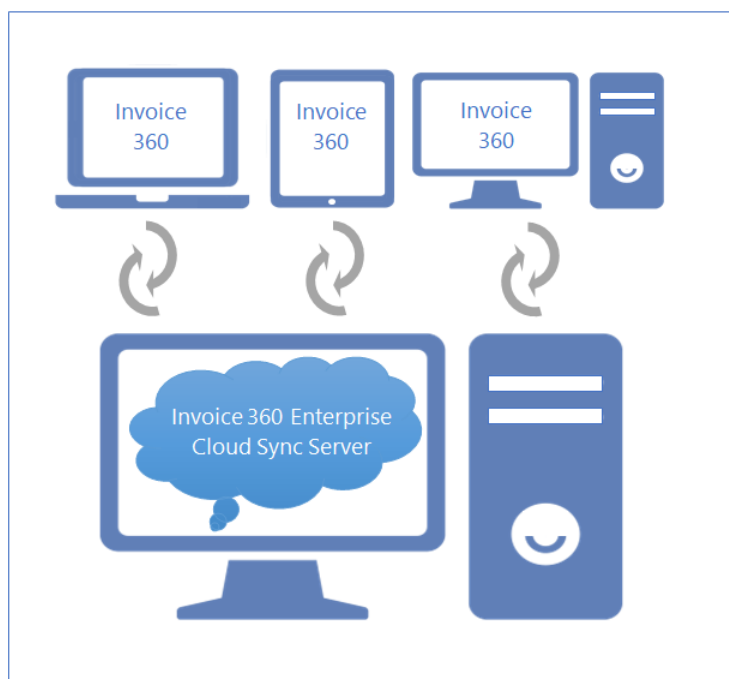
Invoice 360 Enterprise is an invoice system that consists of an extremely easy to use invoice cloud server on the Windows Desktop and Invoice 360 app (Microsoft Store) that syncs data with the server. The invoice cloud server on the Windows Desktop ensures privacy of your business transactions and enables you to save on monthly cloud subscription cost.

Multi-User Syncing with NO SUBSCRIPTION COST!

INVOICE 360



INVOICE 360 ENTERPRISE



The Invoice 360 app, once synced with cloud server, is available for use even when the cloud is unavailable. This means you have business continuity and are resilient to network failures. Invoice 360 app is great for people on-the-go. For example, a salesperson can bring the app to meet customers, invoice them and then go back to office to sync the info to cloud.

How to Sync data across multiple devices in 3 Simple Steps?

If you have installed Invoice 360 from the Microsoft Store, you can immediately start to use it without any further configurations or setup. Any changes you make will be saved locally on the device. When you are ready to start syncing your data across devices, simply follow the steps below. In general, it involves installing and running cloud server on your Windows Desktop and then setting up Invoice 360 to sync with it.

Prerequisites

Please make sure Invoice 360 is installed before proceeding to the steps below.



1. Download and Install Invoice 360 Enterprise

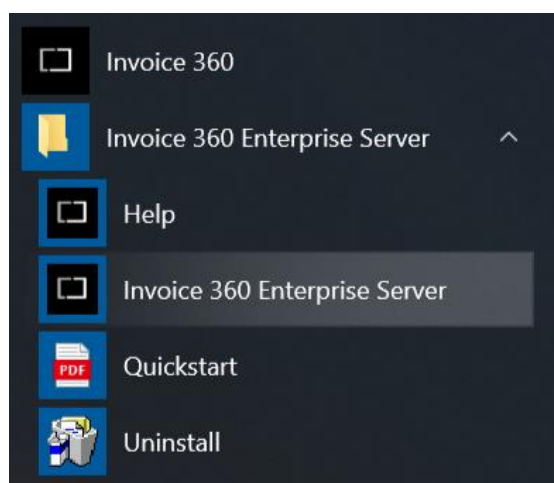
- [Invoice360EnterpriseServer.exe](#) - v1.21 (54 MB)

Requirements

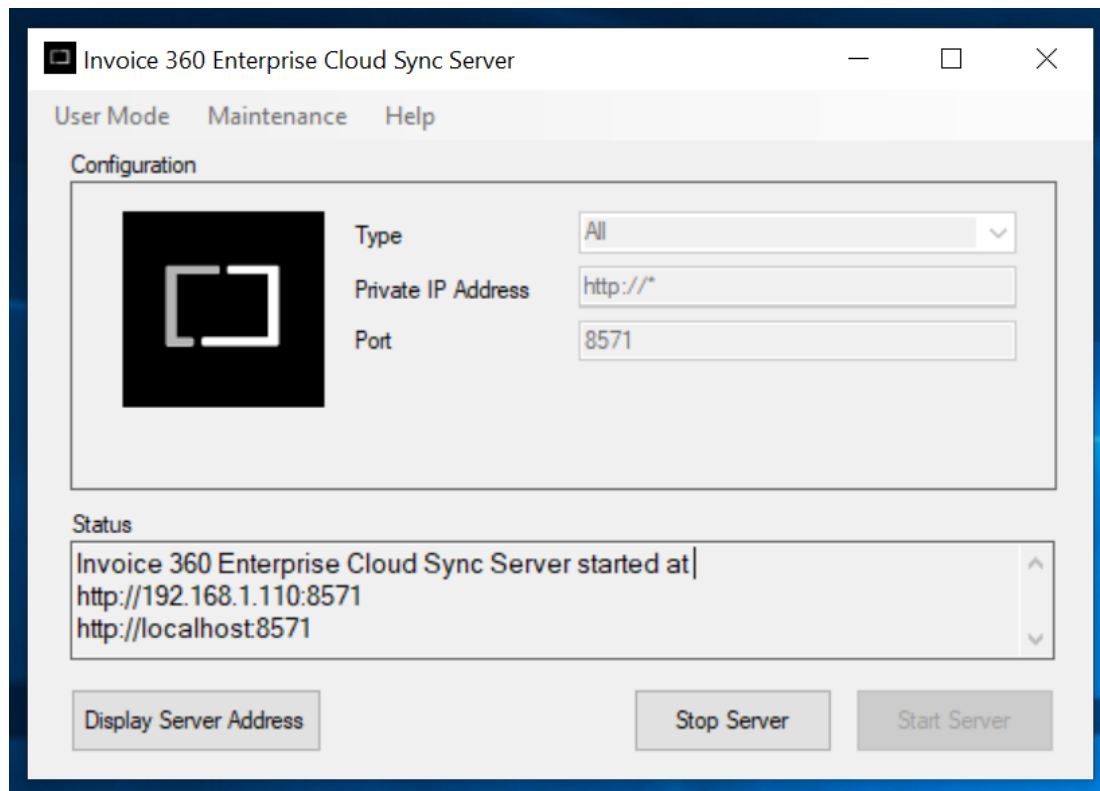
- Windows 10 (x86 or x64)
- Administrative Rights is required to start the Invoice 360 Enterprise Cloud Sync Server. If the Client app and Server is running on different PCs/devices, a private network or subnet is required.
- For users of Invoice 360 Enterprise 1.2 (or earlier versions), please wait for the next update and further instructions before upgrading.

2. Start Invoice 360 Enterprise Server

Go to the Start Menu and locate Invoice 360 Enterprise Server.



Right Click on Invoice 360 Enterprise Server and select "Run as Administrator". The Server requires administrator rights to listen to a specific IP address and port.

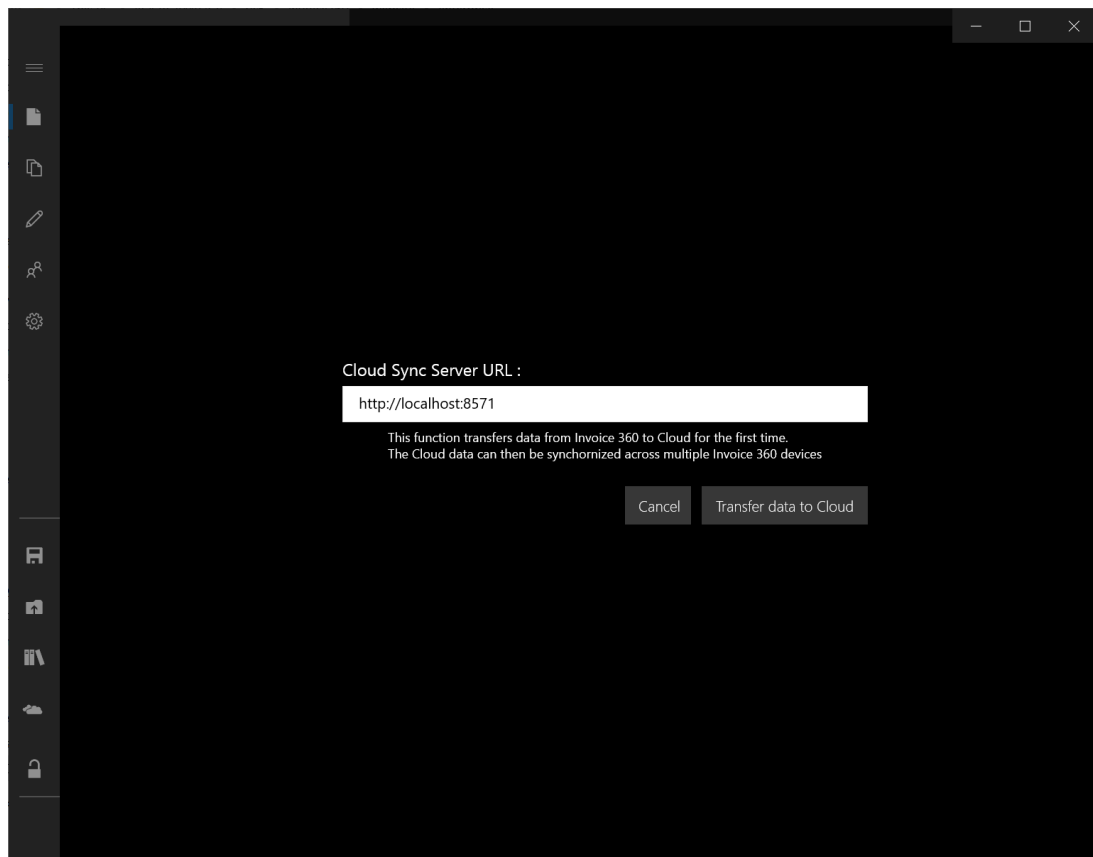


Use the default values provided and click on "Start Server". Once the cloud server is started, the addresses it listens on are displayed. In the screenshot above, the server addresses are <http://localhost:8571> (for local devices) and <http://192.168.1.110:8571> (for remote devices). Please be assured that Invoice 360 Enterprise Cloud Server only listens on PRIVATE subnet addresses. This means only devices running in your subnet (private network) will be allowed to connect to it for syncing.

3. Start Invoice 360 and transfer data to cloud server

On the same device running Invoice 360 Enterprise Cloud Sync Server, go to the Start Menu and launch Invoice 360. Click on the "Hamburger -> Cloud Sync" menu item and select "Transfer data to Cloud". This will transfer all Invoice 360 data stored in your device to the cloud server. Select "Yes" when prompted with "**Let Invoice 360 Enterprise access your name, picture and other account info?**".

When you see the screen below, leave the values as the default and click on “Transfer data to Cloud”. The data in your Invoice 360 app will be transferred to the cloud server and used to initialize the cloud data. You will only need to perform this operation once.



From now onwards, every time you make a change on an invoice or on any other records in Invoice 360, the changes will be saved to your app local database, and automatically synced to the cloud server.

If you need to setup Invoice 360 on another device to sync with the cloud server, check out the “Setup Invoice 360 on a Remote Device to Sync with Invoice 360 Enterprise” section.

Setup Invoice 360 on a Remote Device to Sync with Invoice 360 Enterprise

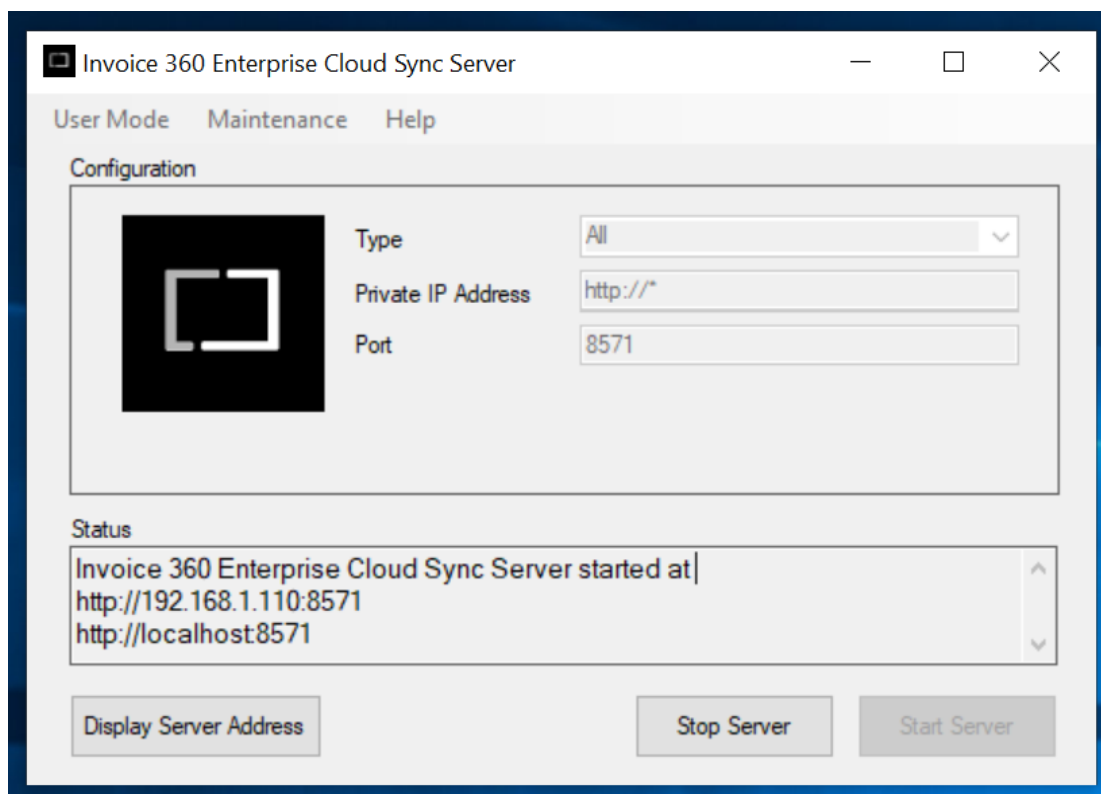
Invoice 360 Enterprise supports Invoice 360 running on one PC/device to sync with a Server running on another PC/device. The PCs/devices must be connected to a private network or subnet. This tutorial illustrates how to setup Invoice 360 on a remote device to sync with Invoice 360 Enterprise.

Assumptions

- You have two or more Windows 10 devices connected via a private network or subnet.
- You have installed Invoice 360 Enterprise Cloud Sync Server on one PC/device and Invoice 360 on another PC/device.

Start Invoice 360 Enterprise Cloud Sync Server

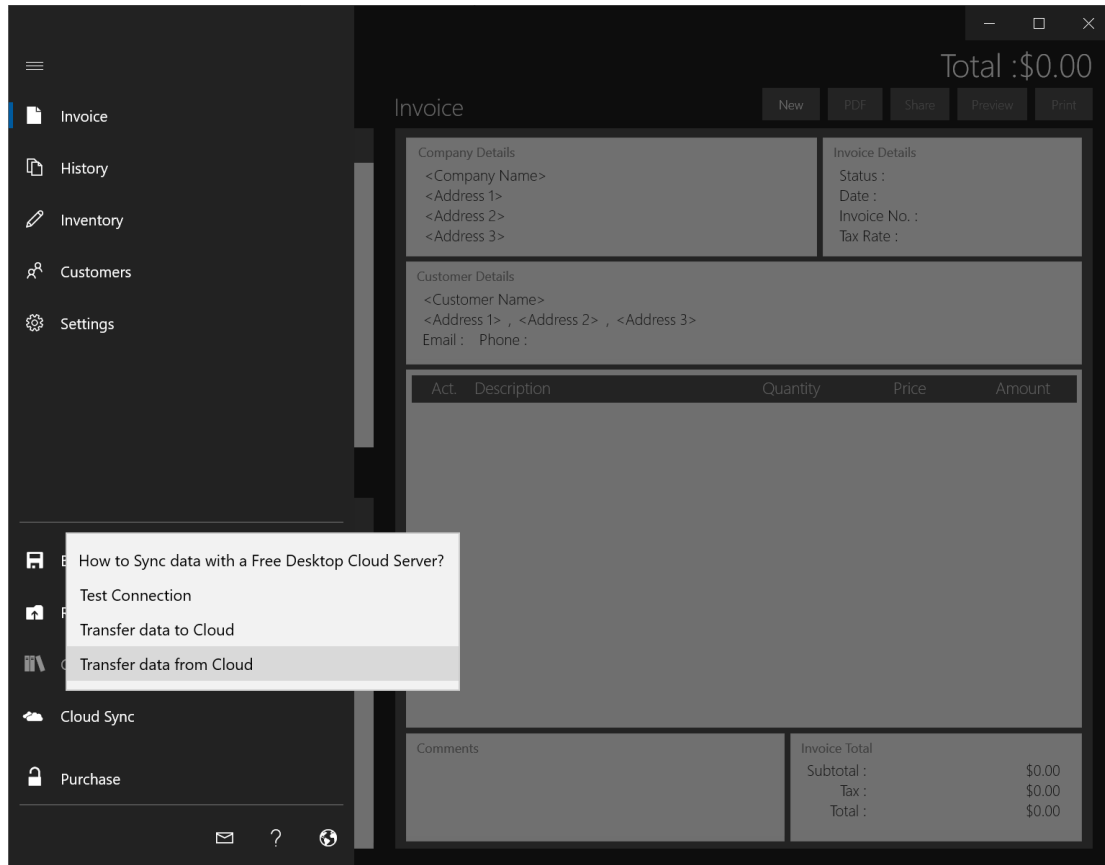
1. On the PC/device that you have installed the Invoice 360 Enterprise Cloud Sync Server, Right Click on the Invoice 360 Enterprise Server and select "Run as Administrator".



2. Use the default values and click on "Start Server". Invoice 360 Enterprise Cloud Sync Server will start listening on your private IP addresses and localhost. This enables Invoice 360 running locally (on the same device as the cloud server) or remotely (on a different device as the cloud server) to sync with Invoice 360 Enterprise.

Setup Invoice 360

1. Launch Invoice 360. Click on the "Hamburger" button, select "Cloud Sync" and click on "Transfer data from Cloud".



2. Enter the address of your Invoice 360 Enterprise Cloud Sync Server. The address to use can be found in the user interfaces of Invoice 360 Enterprise Cloud Sync Server. For example, <http://192.168.0.11:8571> or something similar. Click on the "Transfer data from Cloud" button and Invoice 360 will bootstrap itself with the data from the cloud server. Select "Yes" when prompted to "Let Invoice 360 access your name, picture, and other account info?"



If you see the following screen, you are ready to start using Invoice 360. Any changes made will automatically sync with Invoice 360 Enterprise.

Frequently Asked Questions

1. What can I do if I am unable to start my server?
2. What can I do if I cannot connect Invoice 360 to the cloud server?
3. Despite turning off the Firewall, I am still unable to connect Invoice 360 to the cloud server.
4. How do I reset the server so that I can transfer data from Invoice 360 again?
5. How do I backup or initialize my Invoice 360 Enterprise Cloud Sync Server data?
6. How do I restore from my Invoice 360 Enterprise Cloud Sync Server backup?
7. How do I know whether I have successfully synced Invoice 360 with Invoice 360 Enterprise Cloud Sync Server?
8. How can I import my data into Excel for analysis and reporting purposes?
9. How can I keep the Server running while using my device for other tasks?
10. What does BYOC means and why is it important?
11. Where can I download previous versions of Invoice 360 Enterprise?

Recommendations

1. What can I do if I am unable to start my server?

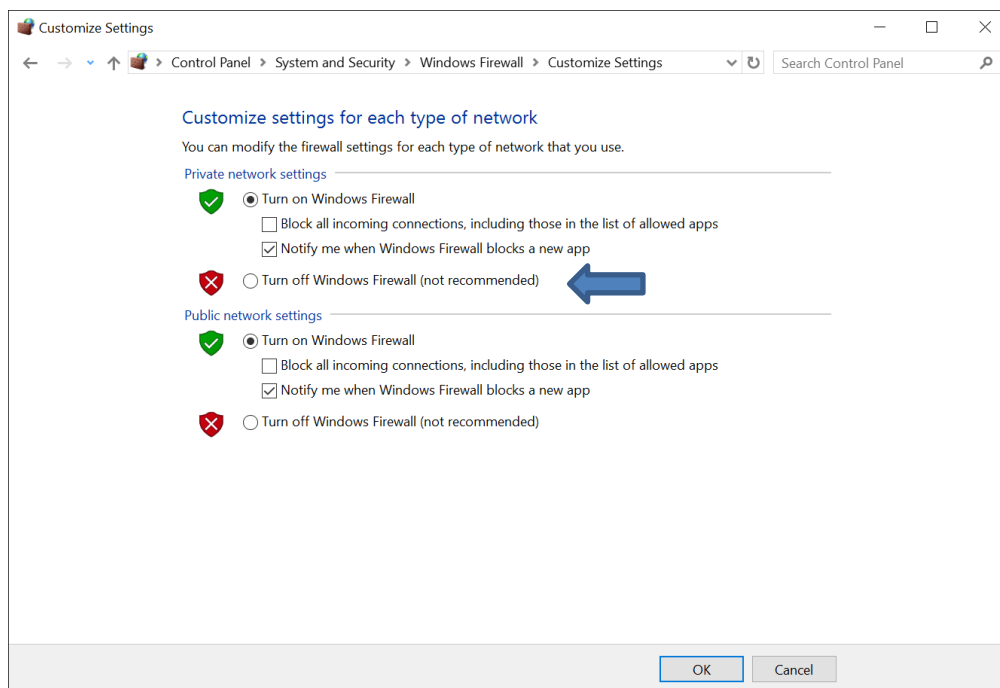
Before starting the server, remember to Right Click on the Invoice 360 Enterprise Server and select "Run as Administrator". This is important as the server requires Administrator rights to listen on a specific IP address.

2. What can I do if I cannot connect Invoice 360 to the cloud server?

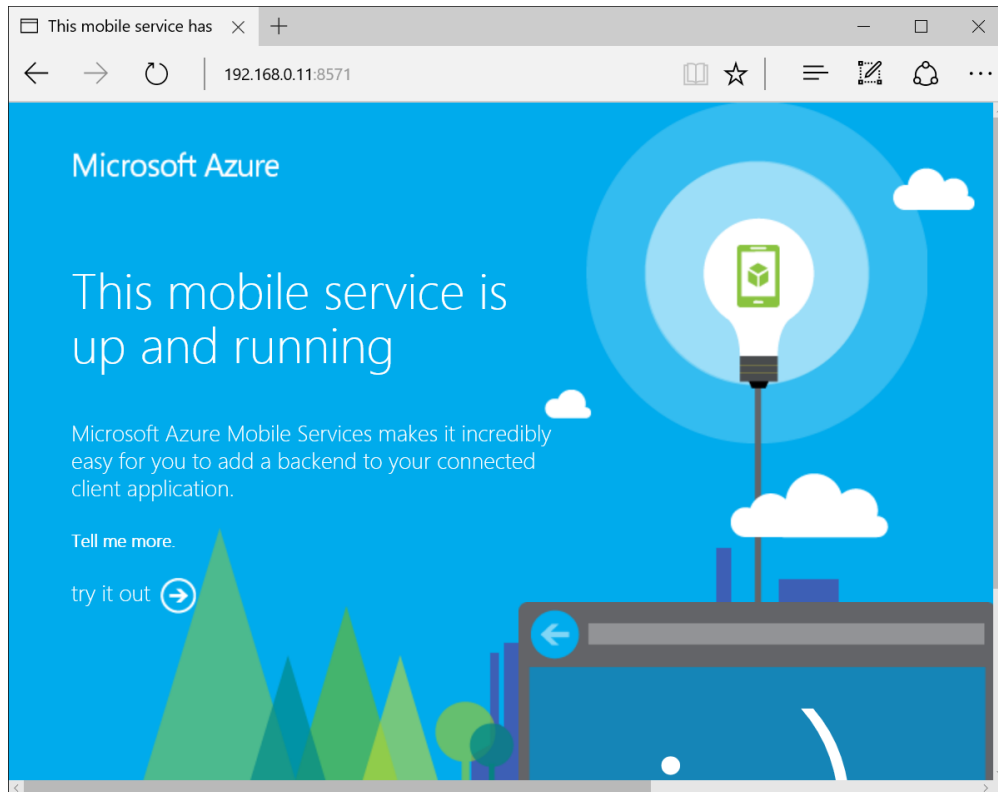
Turn off the Windows Firewall for your Private network temporarily

To see if the problem is caused by the Windows Firewall, you can turn off firewall temporarily on your private network.

On the PC/device running your Enterprise Cloud Sync Server, launch "Windows Firewall" from the search bar (or Cortana Ask Me Anything) and click on "Turn Windows Firewall on or off". In the "Private network settings", select "Turn off Windows Firewall". Please make sure that you are turning off the Firewall for your **private network** only.



Now go to the device running the Invoice 360, launch Microsoft Edge and enter the IP address and port number (e.g. <http://192.168.0.11:8571>) again. This allows you to access the server outside of Invoice 360. If you see the following screen, it means the problem is related to the Firewall.

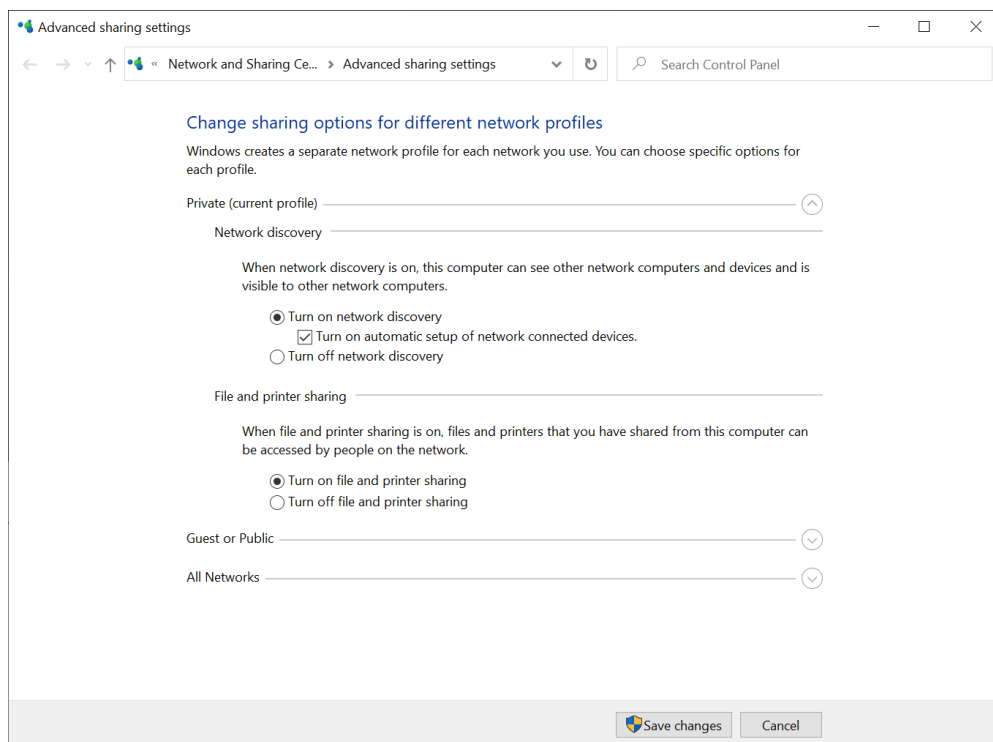


3. Despite turning off the Firewall, I am still unable to connect Invoice 360 to the cloud server.

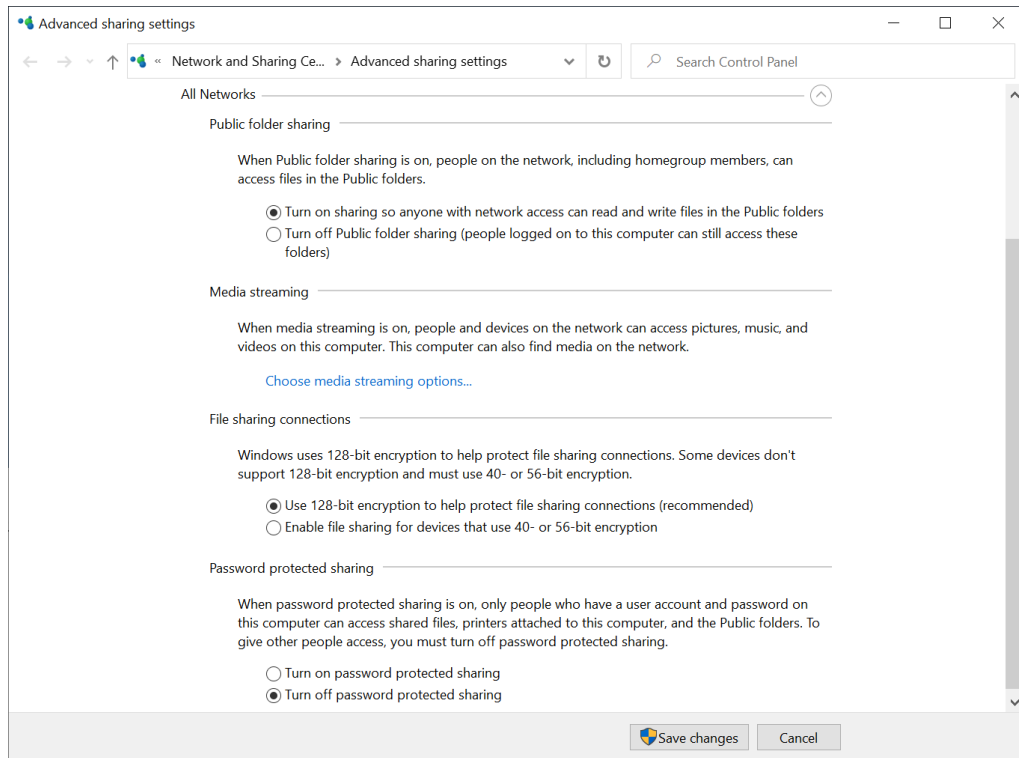
For some users (Windows 10 version 1803 onwards), turning on "Network discovery" and "File and printer sharing" resolved the issue. If you are using an earlier version of Windows 10, you can consider [creating a Windows Homegroup](#).

On the PC/device running Invoice 360 Enterprise Cloud Sync Server

- a. First, make sure you are connected to your office/home WiFi and not the wireless internet provided in the public. Launch "Settings -> Wi-Fi -> Change advanced sharing options". In the "Private" profile, "Turn on Network discovery" and "Turn on file and printer sharing".



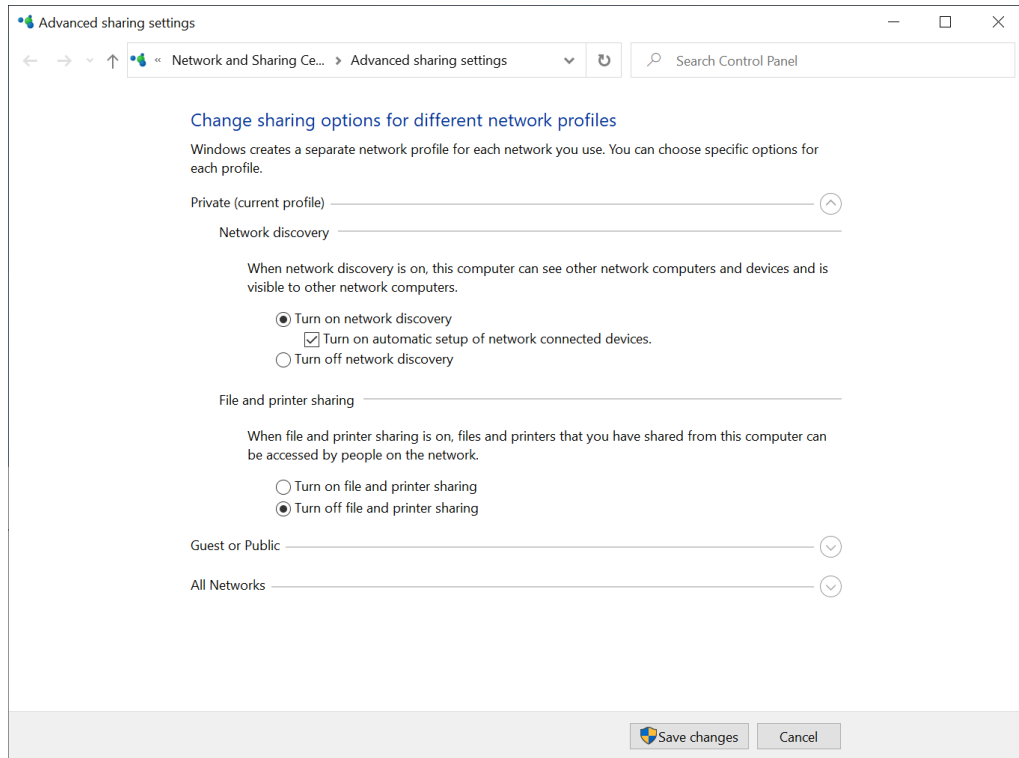
- b. Next, click on "All Networks", and "Turn on sharing so anyone with network access can read and write files in the Public folders".



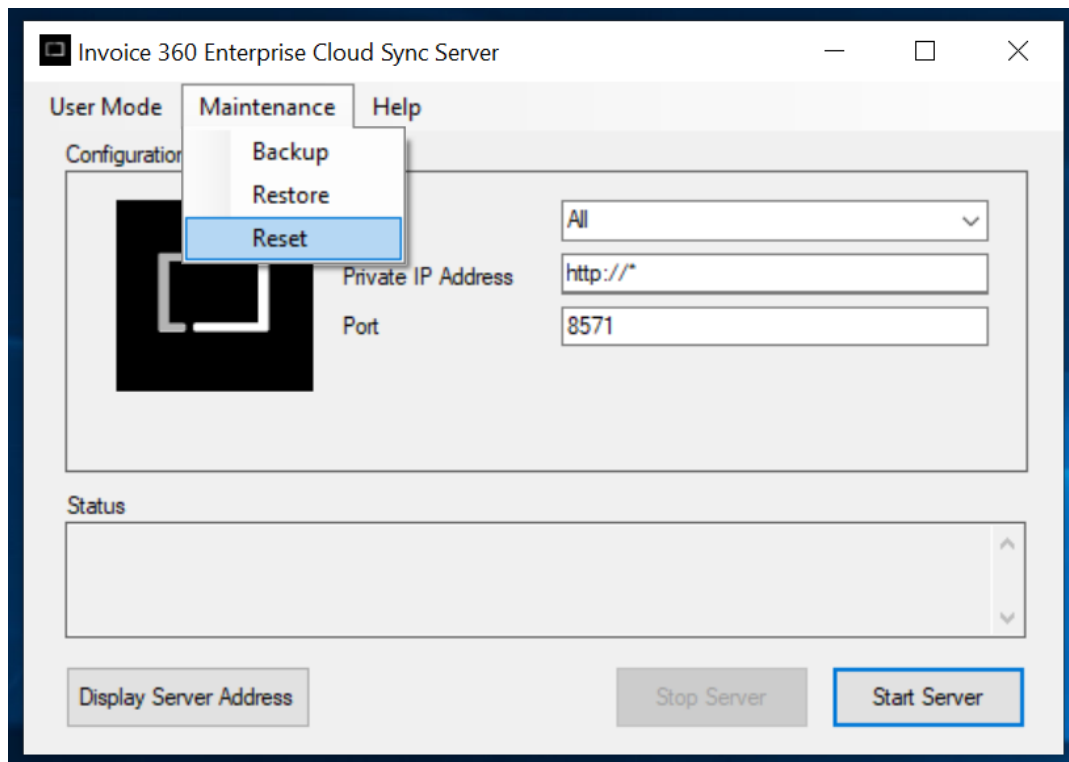
- c. Finally, "Turn off password protect sharing" and click on "Save Changes" when you are done.

On the PC/device running Invoice 360

- a. First, make sure you are connected to your office/home WiFi and not the wireless internet provided in the public. Launch “Settings -> Wi-Fi -> Change advanced sharing options”. In the "Private" profile, "Turn on Network discovery", and finally, click on “Save changes”.

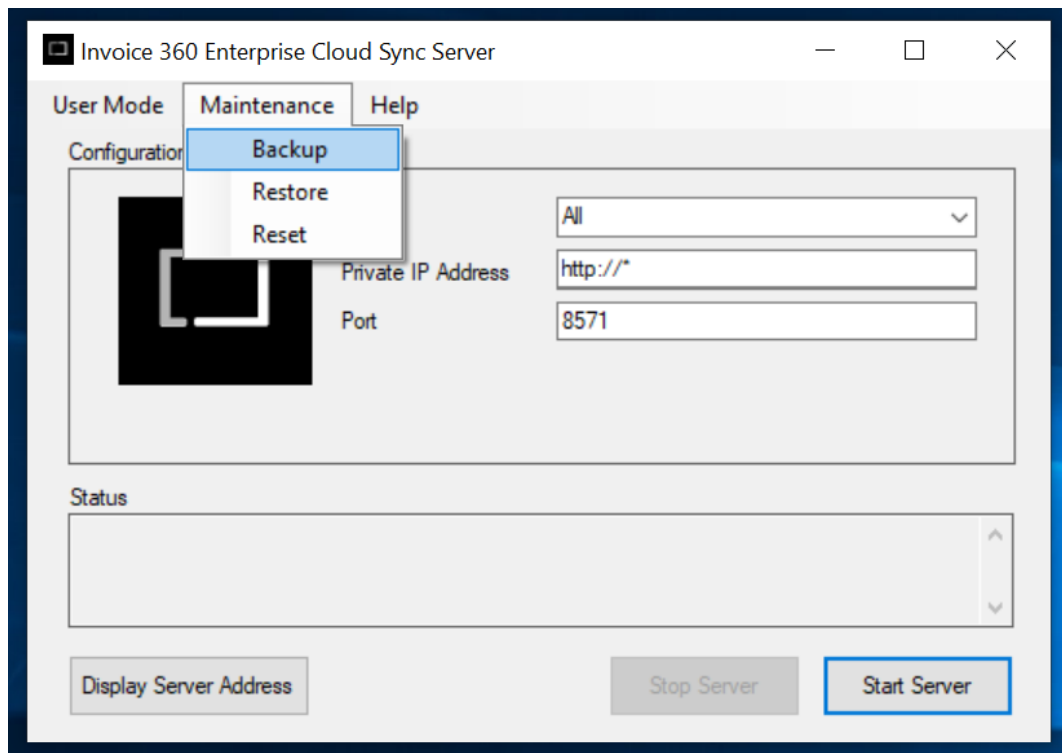


4. How do I reset the server so that I can transfer data from Invoice 360 again?



The "Reset" menu item as shown above enables you to reset Invoice 360 Enterprise so that you can start afresh with a new database. Upon reset, you can perform "Transfer data to Cloud" from Invoice 360 to reinitialize the server. Please remember to backup the database if you want to keep a copy of the existing data.

5. How do I backup or initialize my Invoice 360 Enterprise Cloud Sync Server data?



The “Backup” menu item as shown above enables you to back up the Invoice 360 Enterprise database to a specified folder.

If you have created a lot of demo data for testing, you can use the “Reset” function to clear the entire server database. This will enable you to start the database from fresh without removing the records individually.

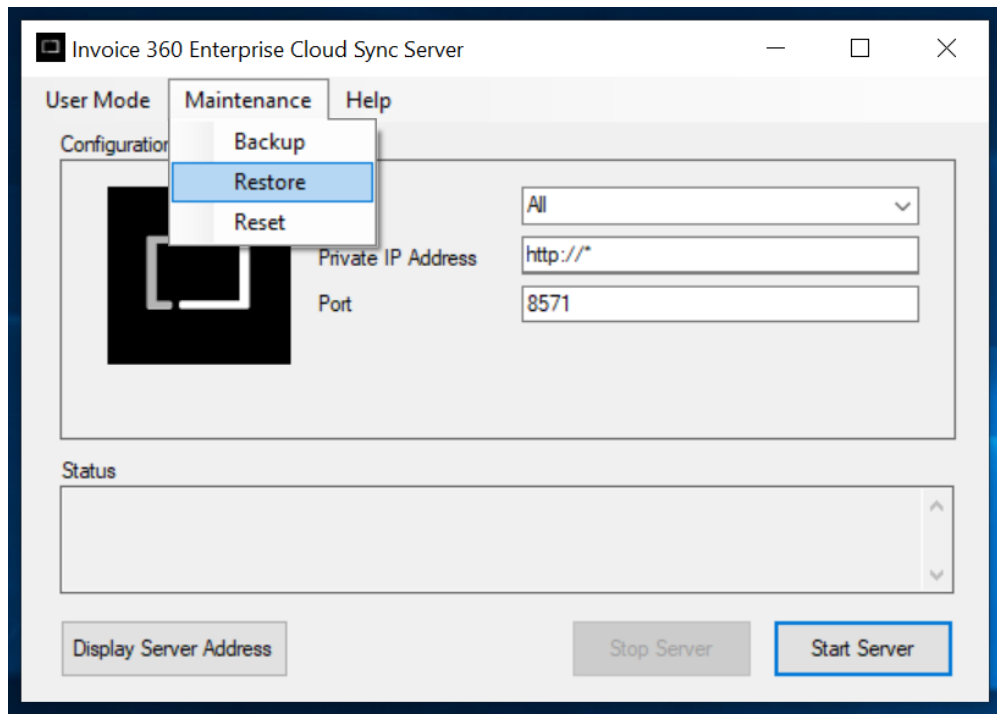
Note

Invoice 360 Enterprise Cloud Sync Server periodically back up the data files into the “AutoBackup” subfolder for you automatically.

6. How do I restore from my Invoice 360 Enterprise Cloud Sync Server backup?

Please note that once you restore a backup in the Invoice 360 Enterprise Cloud Sync server, all the client apps (Invoice 360) will need to bootstrap ("Cloud Sync -> Transfer data from Cloud") their data from the Server again to ensure data consistency.

- a. Uninstall Invoice 360 from all your devices.
- b. Launch Invoice 360 Enterprise Cloud Sync Server. Click on “Maintenance->Restore” and select the folder containing your back up.



- c. Install Invoice 360 on your devices and set it up with "Cloud Sync->Transfer data from Cloud". After the app bootstraps, you are ready to use Invoice 360 Enterprise.
7. How do I know whether I have successfully synced Invoice 360 with the Invoice 360 Enterprise Cloud Sync Server?

Every time you made a change to the invoice or to any other records, it would be saved to your app local database. The changes would also be automatically pushed to the server. If a network connection is not available, the “push” operations will be cached locally until a connection is available.

The app does not specifically prompt you when a “push” to the server has failed. This is to ensure seamless use of the app. It does, however, keep track of the number of outstanding operations to be synced with the server. You can check the number of outstanding operations in the app bar “Sync” button. For example, if you see “Sync (10)”, it means you have 10 outstanding operations to be synced with the server.

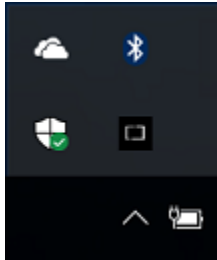
A two-way sync is triggered when you click on the “Sync” button. This means besides pushing data to the server, the data that is updated by other devices to the server is also downloaded to your device.

8. How can I export my data into Excel for analysis and reporting purposes?

You can launch Invoice 360, go to "History" screen and tap on the “Statements” button in the app bar. This will allow you to export data into “.csv” files which you can easily open in Microsoft Excel for analysis. We recommend that you perform a Sync to ensure that you have all the latest data from the cloud server before you perform the export.

9. How can I keep the Server running while using my device for other tasks?

You can click on the Minimize button in Invoice 360 Enterprise Cloud Sync Server. This will minimize the server to the Windows System Tray. Please ensure that the server is started before minimizing it so that the syncing process can be carried out.



When you want to shut down the server, you can click on “Show hidden icons” (the up-arrow icon as shown below) in Windows Task bar, double click on the Invoice 360 Enterprise icon, and click on the “Stop Server” button.

10. What does BYOC means and why is it important?

Invoice 360 Enterprise is developed based on the “Bring Your Own Cloud” (BYOC) vision. Basically this allows you or your company to have the flexibility to run the cloud server on a public cloud hosted by us, on your own cloud (with Microsoft Azure), or on a self-hosted cloud in a Windows Desktop Executable (Invoice 360 Enterprise).

Behavior of a cloud syncing app

Eventual Consistency

Imagine, both you and your colleague are using Invoice 360 on different devices. The changes to the data made by your colleague would not be available to you until he or she syncs the data to the cloud. Though the app attempts to sync the updates as soon as data is saved locally, it may not be possible when the network connection is not available, or the cloud is down. Even when your colleague's data gets synced to the cloud, you may not be connected to the network to get this latest data.

Invoice 360 Enterprise Cloud Sync guarantees that eventually when everyone syncs their data, the data will be consistent and available to everyone.

Business Continuity

The app is designed to continue to run most of its operation when the cloud is down or when a network connection is not available. The app keeps a local copy of the data and ensures business as usual. It also keeps track of information that needs to be synced with the cloud to ensure cloud/local data consistency.

Syncing Conflicts

Different users who are using different devices running Invoice 360 may be making changes on the same record at different times. When both users sync their data with the cloud, a sync conflict can occur. Though a conflict is automatically handled by Invoice 360 Enterprise, the behavior may be different from what you typically expect from a web application. Please see the section on "How Invoice 360 Enterprise Cloud Sync Handles Sync Conflicts" to understand how Invoice 360 Enterprise Cloud Sync handle sync conflicts.

How Invoice 360 Enterprise Handles Sync Conflicts?

The following is a simple overview of how Invoice 360 Enterprise handle sync conflicts.

Last Sync Update Wins

Imagine that you have a customer record and it is updated by two different users on their devices. For example, the Phone Number for a customer is “1234567”. If User 1 changes it to “1111111” and User 2 changes it to “2222222”. User 1 may have made the change in the morning, but his device has no access to the network until the evening. Meanwhile User 2 made the change in the afternoon and sync the data immediately. When User 1 finally gets access to the network, his updates will be synced with the cloud. In this scenario, User 2 changes will be overwritten by User 1. Invoice 360 uses the simple rule of the one who sync last wins.

Delete takes precedence

If you make an update to a customer record on your device locally, and your colleague using another device removes the same record and then syncs to the cloud first. In this case, when you try to sync to the cloud, the delete takes precedence. This means the record on your local device will be removed during a sync instead of being updated to the cloud.

Master Child Records changes treated as Update

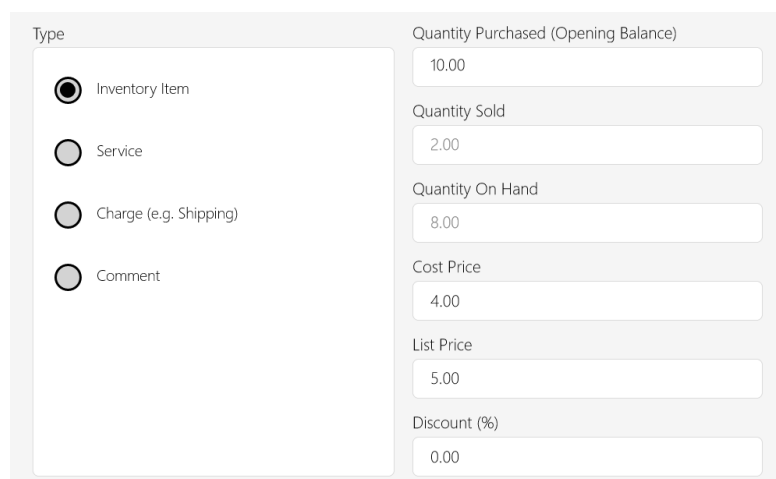
An invoice can have multiple items such as “Item 1” and “Item 2”. If you add an additional “Item 3” to the invoice with your device while your colleague adds an “Item 4” to the invoice using another device, during a sync there will be a conflict on the items. Invoice 360 does not merge the different items into the invoice. Instead Invoice 360 handles this by treating the changes to the items as an update to the invoice. This means the last one to sync wins. So, if your colleague syncs the app later than you, then the invoice will ultimately end up with “Item 1”, “Item 2” and “Item 4”.

Inventory Management

Invoice 360 Enterprise is the perfect solution for managing and tracking inventory of your business. It automatically keeps track of the number of items sold for the different products and calculates the quantity on hand available. When you sync your device with the Enterprise Cloud Sync Server, the items sold and quantity on hand are automatically consolidated for you. The following table illustrates the basic formula Invoice 360 Enterprise used for tracking inventory.

$$\text{Quantity On Hand (QOH)} = \text{Quantity Purchased (Opening Balance)} - \text{Quantity Sold}$$

All the three fields described above can be found in the Inventory screen of the client app.



- Quantity Purchased (Opening Balance) is the only field that you need to enter or change in Invoice 360 Enterprise. When you first create a product item in the Inventory screen, you can enter a value for this field. This field is also typically known as your Opening Balance. Whenever you purchase new items, you can add the number of items purchased to this field. This field is only available for items with “Inventory” Type.
- Quantity Sold is the number of items sold or issued in invoices. Invoice 360 Enterprise tracks the items sold for each product, service or charge automatically. When you invoice a customer with an item, the number of items sold will be incremented. When other users sync their data to the cloud, and the data is downloaded to your device, the number of items sold will also be automatically consolidated. If you “Void” an invoice, the number of items sold will be deducted.
- Quantity On Hand or commonly known as QOH is the number of items you have available for sale. It is automatically calculated Invoice 360 Enterprise as the Quantity Purchased minus Quantity Sold.

Inventory Management Example

We will take you through an example of how you can use Invoice 360 Enterprise to manage your inventory below.



1. Create the Product Item

When you create a product in the Inventory screen, you enter a value for the "Quantity Purchased (Opening Balance)" field. For example, if you create an item with the name "Pencil Case" with an opening balance of 1000.

$$\text{Quantity On Hand (QOH)} = \text{Quantity Purchased (Opening Balance)} - \text{Quantity Sold}$$

The following is what you will see in the Inventory screen for the "Pencil Case" product.

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
1000	1000	0

2. Invoice your Customer

The system will help you update the number of items sold each time you invoice your customer. For example, if you have created an invoice with 100 pcs of "Pencil Case", you will have the following:

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
900	1000	100

If you create another invoice with another 100 pcs of "Pencil Case", you will have the following:

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
800	1000	200

If you “Void” the second invoice, the “Quantity Sold” figure will be automatically deducted and “Quantity On Hand” updated.

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
900	1000	100

If your colleague uses another device to invoice 100 pcs of “Pencil Cases”. The “Quantity Sold” field on your device will be updated once the data is synced. You now have two invoices with 100 pcs of “Pencil Case” each.

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
800	1000	200

3. Inventory Adjustment

If you have received a new stock of another 1000 pcs of “Pencil Cases”, you can go to the Inventory screen and add it to the "Quantity Purchased (Opening Balance)" field.

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
$800 + 1000 = 1800$	$1000 + 1000 = 2000$	200

You can update the “Quantity Purchased” field if you find any discrepancy with your “Quantity On Hand”. Please note that you do not update the “Quantity On Hand” directly, the adjustments are always made through the “Quantity Purchased” field.

4. Stock Take

During your annual stock taking, you can simply adjust the "Quantity Purchased (Opening Balance)" for each of the items to ensure that you have the correct “Quantity on Hand”.

Note: During stock taking, you may need to make changes to many of the inventory items at one go. As Invoice 360 Enterprise is a cloud syncing system, we recommend that you ensure that everyone has synced their data and will not be making changes to the records in the system while you are doing stock taking and updating the inventory records in bulk.

Archive

The “History” screen allows you to archive invoice records that are “Fully Paid” and are no longer required. This function will export the archive records in a comma delimited format (csv) and then remove the records from the cloud database. The “Quantity Purchased”, “Quantity Sold” and “Quantity On Hand” fields will also be updated to ensure accuracy of the records you have in your system. The update is explained with an example in the next section.

Important Note

We recommend that you ensure the following before performing an archive:

- **All the devices syncing with the Enterprise Cloud Sync Server has been synced.**
This is to ensure that the cloud server has the latest data before an archival is carried out.
- **Everyone is informed not to perform updates to the Inventory records during the archive.**
You can also start the Enterprise Cloud Sync sever on “localhost” only and use Invoice 360 on the same device to perform the archive. This will prevent other users from accidentally updating the Inventory records and causing inconsistency.
- **Perform a backup of your Enterprise Cloud Server database.**
The archive operation may remove many records at one go and, in the process, if it is interrupted by a Power Failure or Network Failure, you may end up with inconsistent records. By performing a backup, you can ensure that you can easily recover from the failure. You can refer to the FAQ on “**How do I backup or initialize my Enterprise Cloud Sync Server data?**” to perform a backup.

Archive Example

When invoice records are removed from the system, the “Quantity Sold” field will be recalculated based on the invoice records available in the system. **The “Quantity Purchased (Opening Balance)” field will also be updated to ensure that you have the correct “Quantity On Hand”.**

We can easily understand this with an example where we have 2000 pcs of “Pencil Case” purchased and sold 200 pcs of them in two different invoices.

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
1800	2000	200

If the two invoices involving the 100 pcs of “Pencil Case” each are archived, the outcome will be as follows:

<i>Quantity On Hand (QOH)</i>	<i>Quantity Purchased (Opening Balance)</i>	<i>Quantity Sold</i>
1800	1800	0

The 200 pcs of “Pencil Cases” are no longer keep tracked of by the system. Thus, the figure will need to be deducted from both the “Quantity Purchased (Opening Balance)” and “Quantity Sold” field keeping the “Quantity On Hand” value the same.

The archive feature outputs a summary file “InventoryAdjustment.csv” to illustrate the adjustments made to the inventory table.

...	<i>Quantity Purchased</i>	<i>New Quantity Purchased</i>	<i>Quantity Sold</i>	<i>New Quantity Sold</i>
“Pencil Case”	2000	1800	200	0

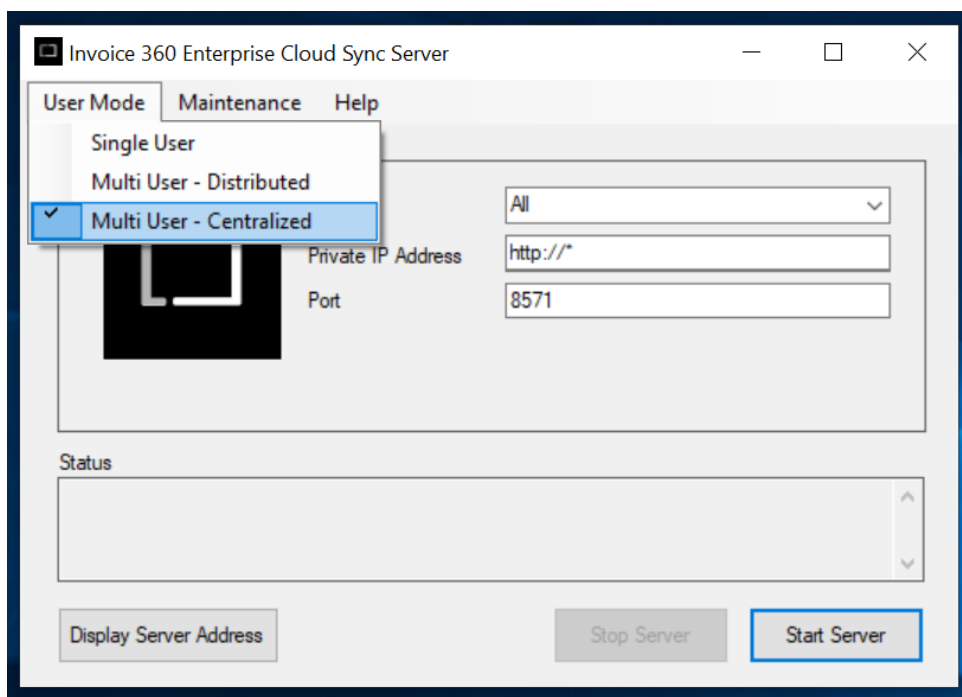
All the archive records will also be exported in a comma delimited format.

User Mode of Invoice 360 Enterprise

Invoice 360 Enterprise supports a configurable option known as User Mode. This option specifies how an Invoice (or Quote/Estimate) number will be assigned when using Invoice 360 with multiple devices. The User Mode should be specified once and not changed throughout the lifetime of the invoicing cycle.

The following user modes are supported:

- Single User
- Multi User – Centralized (Default)
- Multi User – Distributed



Single User

For Single User, the invoice (or quote/estimate) number will simply be incremented from the last number used on a device. For example, if you started using Invoice 360 on your Desktop PC in your office. Your first invoice will be assigned the number 1. Your second invoice will be assigned the number 2, automatically incremented from the previous invoice number on your device.

Next, you plan to bring your Windows tablet to your customer or event site for invoicing purpose. Before you set off, you set up Invoice 360 on the tablet and perform a sync to load the latest data into the app. When you invoice your customer, the invoice number 3 will automatically be used. This is because the tablet contains the data from your Desktop PC and the app knows that the previous invoice number is 2. In other words, for Single User mode, simply remember to perform a sync on your device before bringing it out of your office.

Please also be assured that Invoice 360 Enterprise uses an internal ID and allows different invoices to have the same invoice number. If you forget to perform a sync, and ends up with duplicate invoice number, you can easily resolve the issue by changing the invoice numbers without losing any data.

Multi User - Centralized (Default)

The first thing you will notice when using Multi User mode, is the user name (of the device) will be automatically recorded when creating invoices, quotes and estimates. This helps you identify and differentiate the documents created by different users.

For Multi User, you can choose between Centralized and Distributed mode as the User Mode. The Centralized mode is easy to understand. You have different users using different devices to invoice the customer. Each time a new invoice is created, Invoice 360 goes to the server to request for a new invoice number. Your invoice number will be based on a sequence number tracked by the server.

If you are out of office and do not have an active connection to the cloud server, a new invoice (or quote/estimate) will be automatically assigned a number 0. The invoice will still be created, and you can still perform almost all the different functions on an invoice. When you go back to office, you can then go to the History screen to assign ("Assign Number" button) an invoice number from the cloud server. The "Assign Number" function simply calls the server to get the next available number. At any time, you can also choose to manually change the invoice number so as to issue the invoice to the customer immediately.

The screenshot displays the 'History' screen in the Invoice 360 application. On the left, a sidebar contains navigation icons and a list of invoice types: 'Invoice Number', 'Invoices' (selected with a green checkmark), 'Active Invoices', 'Past Due Invoices', 'Paid Invoices', and 'Partially Paid Inv.'. Below this is a 'Date Range' section with options: 'Custom', 'Today' (selected with a green checkmark), 'Yesterday', 'Past 3 Days', and 'Past 10 Days'. At the bottom of the sidebar are input fields for 'Start Date' and 'End Date', both set to '4/27/2020'. The main area features a search bar labeled 'Search Customer Name' and a list of actions: 'Assign Number', 'Archive', 'Duplicate', 'Payments', 'Void', 'Delete', and 'Open'. The top right corner shows 'Balance : \$11.26' and 'Records : 1 - Total : \$11.26'. The central panel displays details for a specific invoice dated '4/27/2020': 'Invoice No. : 0', 'Name : X Demo Customer', 'Balance : \$11.26', 'Status : Active', 'Record Id : 0a5b466b-e75e-4cc3-aad5-4862ca824373', and 'User Name : jamesboo@connectcode.net'. The 'Total : \$11.26' is also shown on the right side of the details panel.

This User Mode is especially suited if all or most of your Invoice 360 users are in your office where the Invoice 360 Enterprise Cloud Sync Server is located. And occasionally, you have a salesperson who need to invoice a customer on a device outside the office.

Multi User – Distributed

For Multi User, you can also choose to use the Distributed mode. This User Mode is slightly more complex (not rocket science though) and arises from the huge demand from our early customers. This mode can be easily understood through the following examples.

If you have 2 users of Invoice 360, their invoice number will be assigned as follow:

- User 1 Invoice Number: 1, 3, 5, 7, 9, ...
- User 2 Invoice Number: 2, 4, 6, 8, 10, ...

If you have 3 users of the client app, their invoice number will be as follow:

- User 1 Invoice Number: 1, 4, 7, 10, 13, ...
- User 2 Invoice Number: 2, 5, 8, 11, 14, ...
- User 3 Invoice Number: 3, 6, 9, 12, 15, ...

The invoice number, quote number and estimate number are assigned in a predetermined/predefined manner to avoid duplicates. The Distributed mode requires a little bit more of setup but allows the Invoice 360 app to run in a totally distributed manner without an active connection to the cloud server for an invoice number to be assigned.

This User Mode is especially suited if all or most of Invoice 360 users are not located in your office and will be invoicing customers without an active connection to the cloud server.

To properly use the Multi User – Distributed mode, you can follow the steps below:

1. Set Invoice 360 Enterprise Cloud Sync Server to Multi User - Distributed Mode before you transfer data from the Cloud to Invoice 360.
2. Launch Invoice 360, go to the Settings screen and **change the Increment Number to your number of users**. For example, if you have 3 salesperson using Invoice 360, change the Increment Number to 3. This number can be changed when your number of salesperson changes.
3. Each salesperson can then be notified of their invoice number sequence. For example,
 - User 1 Invoice Number: 1, 4, 7, 10, 13, ...
 - User 2 Invoice Number: 2, 5, 8, 11, 14, ...
 - User 3 Invoice Number: 3, 6, 9, 12, 15, ...
4. Next, when User 1 creates his **first** invoice (or quote/estimate). He will need to remember to change his invoice number to 1. When User 2 creates his first invoice, he will need to remember to change his first invoice number 2 and so on. They will only need to remember to do this for the **first time**.
5. After the first invoice, the invoice numbers will be automatically incremented based on the last invoice the user created.
 - User 1 second invoice will be assigned the number 4 (incremented by 3 from 1).
 - User 2 second invoice will be assigned the number 5 (incremented by 3 from 2).

- User 3 second invoice will be assigned the number 6 (incremented by 3 from 3).

The app keeps tracked of the invoices created by the different users and will automatically increment the correct invoice number for the users.

In summary, to use the Multi User – Distributed mode, simply setup the Increment Number in Settings screen and remind your users to correctly change their first invoice number for everything to be seamless afterwards. The app uses an ID internally for your invoices, quotes and estimates and you can be assured that you will not lose data if you assigned the numbers incorrectly.

License Information

Invoice 360 (Microsoft Store app)

- Invoice 360 is available Free in Standalone mode in Microsoft Store.
- Purchasing the app will remove the “Printed with Invoice 360” watermark and enable data Syncing with Invoice 360 Enterprise.
- If you have multiple users, each user will need to purchase the app, in order to Sync with Invoice 360 Enterprise. One license can be used across multiple devices by the same user.

Invoice 360 Enterprise (Desktop Cloud Server)

- Invoice 360 Enterprise Cloud Sync Server is FREE for all paid users of Invoice 360.
- Supports up to 5 Users with Multiple Devices syncing with the cloud server.
- Invoice 360 Enterprise Cloud Sync Server supports up to 10 GB of data.
- <https://www.invoicesoftware360.com/invoice360enterpriselicense.html>

Support

- support@invoicesoftware360.com