

# AMPHIS SOFTWARE

## Amphis Customer v3.0 Quick Guide

### New Features now available in Amphis Customer v3.0

- record the salesperson against an invoice and show sales per salesperson
- store supplier information, invoices received, set payment reminders, record payments made and also credit notes
- customize the Search results columns
- better support for importing items into the Products database for itemised quotes and invoices

### Share Customer Details Across Multiple PCs

You can share customer details across multiple PCs by selecting one PC as the server and configuring the other PCs as clients. You just need to purchase a license for each PC and change the configuration file on the clients to point to the server.

### Powerful Search Facilities

Amphis Customer has powerful search facilities so you can easily and quickly find the customer details you need. You can search by any combination of customer name, company name, address, telephone number, postal code, email address, customer Id, customer history details, customer status and customer group.

Search		Search results							
Customer Id:	<input type="text"/>	Customer Id	Company	Title	Last Name	First Name	Address	Work Tel	Work
Company:	<input type="text"/>	100502		Mr	Jackson	Ted	2200 Lake View, Cambridge		
Last Name:	<input type="text" value="jackson"/>	100517	Acme Cabs	Miss	Jackson	Mary	148 Ocean Road, Cambridge		
First Name:	<input type="text"/>								
Post/Zip Code:	<input type="text"/>								
Address:	<input type="text" value="cambridge"/>								
Telephone:	<input type="text"/>								
Email:	<input type="text"/>								
History:	<input type="text" value="2"/>								
Document Id:	<input type="text" value="2"/>								
Status:	<input type="text" value="All statuses"/>								
Group:	<input type="text" value="All groups"/>								
<input type="button" value="Search"/> <input type="button" value="Clear results"/>									

### Generating Quotes, Invoices, Letters, Payment Reminders, Marketing Letters

Amphis Customer makes it very easy for you to create quotes, invoices, receipts etc. Each type of document is generated from a Microsoft Word "template" and you can easily change the templates to suit your requirements. For example you can add your business logo and contact details, change the wording, fonts etc. All of this is done using standard Microsoft Word facilities.

### Create Quotes - Free form

You can create free-form quotes where you enter one or more paragraphs and headers and a price for each. Amphis Customer automatically adds up the totals and calculates the sales tax. It then generates a Quote as a Microsoft Word document.

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Description	Amount
<b>remove existing fencing</b>	
dismantle and remove and dispose of existing fence panels and fence posts	1200
<b>supply and fit new fencing</b>	
supply and fit 20 6ft x 6ft lap fence panels, 19 9ft fence posts, treat them all with wood treatment	1800

## Create Quotes - Itemised

You can create itemised quotes where you select items from the built-in Items database. You can enter categories for items and enter a list of items that you sell. You can also add shipping, discounts etc. Amphis Customer automatically adds up the totals and calculates the sales tax. It then generates a Quote as a Microsoft Word document.

## Create Invoice - Free form

You can create free-form invoices where you enter one or more paragraphs and headers and a price for each. Amphis Customer automatically adds up the totals and calculates the sales tax. It then generates an Invoice as a Microsoft Word document.

## Create Invoice - Itemised

You can create itemised invoices where you select items from the built-in Items database. You can enter categories for items and enter a list of items that you sell. You can also add shipping, discounts etc. Amphis Customer automatically adds up the totals and calculates the sales tax. It then generates an Invoice as a Microsoft Word document.

## Create Invoice from Quote

You can select an existing quote and automatically create an invoice from it. You can also edit the invoice created, for example if the customer added an extra item to the order.

## Custom Documents

As well as quotes, invoices, customer letters etc, you can define your own custom document types and templates and generate these from Amphis Customer.

## Email documents as PDF

Within Amphis Customer, you can email documents to the customer by simply clicking a button. You can also automatically convert documents to PDF format as they are emailed (requires Microsoft Word 2007).

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## **Job Sheets**

Job sheets can be automatically created from quotes or invoices at the click of a button.

## **Unpaid Invoices**

Amphis Customer automatically tracks invoices and shows you on a Today page which invoices are due and any that are overdue.

## **Payment Reminders**

Payment reminders can be automatically created by selecting an invoice and clicking a button. The reminder includes the amount already paid and the balance outstanding.

## **Customer History**

As well as documents there are other built-in history types you can store against a customer eg notes, site visits, telephone calls etc. You can also define your own history types that you want to store.

## **Reminders To Perform Tasks**

You can create reminders eg to call a customer or create a quote. Reminders are shown on the Today page and you can access the customer at the click of a button. You can also link Reminders to Microsoft Outlook.

## **Tasks and Appointments**

You can create tasks and appointments and optionally link these to Microsoft Outlook to generate automatic pop-up reminders. The tasks and appointments are also shown on the Today page.

## **Built-In Reports**

There are many built-in reports eg Monthly Sales Totals, Overdue Invoices, Quotes Created in the Last 7 Days etc.

## **Custom Reports**

You can build your own reports and these are then added to the Reports menu for easy access.

## **Custom Fields**

You can define your own custom fields to store data specific to your business.

## **Mail Merge**

You can organize customers into groups and then mail merge documents for particular groups.

## **Labels**

You can print customer address labels directly from Amphis Customer. You can either print them one at a time or you can build up a list of labels to print.

## **Emails**

You can drag and drop Emails from Microsoft Outlook onto Amphis Customer and it will

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automatically find the correct customer record and add the Email to the customer history. If there is no corresponding customer record it will prompt you to create a new one.

## Email Templates

You can define Email Templates for standard Emails and standard Email replies. At the click of a button you can send a standard Email to a customer or reply to an Email with a standard reply with the customer details filled in.

## Notes

You can store notes about customers and these notes are time-stamped and easily visible from the Main Details tab.

## Currencies and Sales Taxes

Amphis Customer uses your local currency and you can specify exactly which sales taxes and rates to apply to your quotes and invoices.

## Database

By default, Amphis Customer uses a Microsoft Access database but it can also be configured to use a Microsoft SQL Server database at no extra charge. There is a free version of SQL Server called SQL Server Express.

## License Fees

The license fee is a one-off payment. There are no further charges. The price includes any further upgrades to Amphis Customer and also Email support.

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1 user license \$139 US Dollars / £99 GBP / €110 Euros  
3 user license \$219 US Dollars / £149 GBP / €169 Euros  
5 user license \$289 US Dollars / £199 GBP / €229 Euros

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You can download a **free 30 day trial** of Amphis Customer from [www.amphis-software.com](http://www.amphis-software.com)

We hope you like Amphis Customer and we welcome any feedback and suggestions.