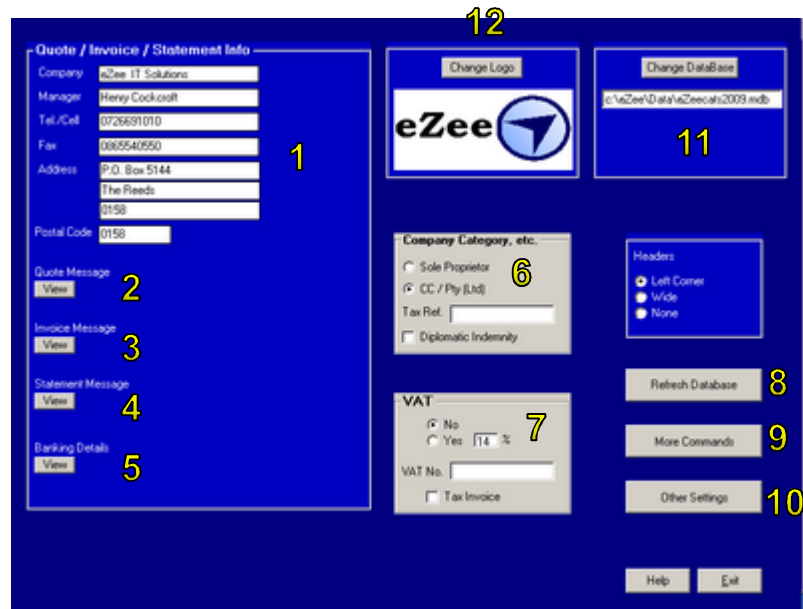
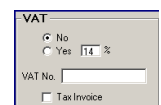
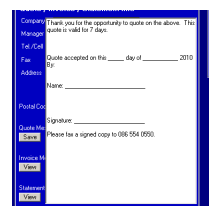


SETTINGS – Customise your business



- 1 Fill these fields with the required info
- 2 Click “View”. A text field will open where you can capture the message you would like to display on quotes.
- 3 Same applies as above for “Invoice” & “Statement” messages
- 4
- 5 Enter your banking details here. This will be pulled through to your quotes, invoices and statements
- 6 Select the type of company
- 7 Select if the company is VAT registered or not. If it is type in the VAT No. and tick “Tax Invoice” in order for the software to create a tax invoice
- 8 This function is used when you update or upgrade eZee to ensure up to date file layouts and good data integrity.
You do not need to Refresh every time you change your database.
To clear certain parts of your database, right-click on refresh Database
- 9 Clicking on “More Commands” gives 3 options “General / Update Tax Tables / Mail Data”



General

When you click on GENERAL a screen will open to allow you to add new categories like Client Categories

When you have a group of clients is to be invoiced on a regular basis, e.g. monthly, like garden services or security services, you create a client category called Monthly. When adding a client on the client list, select the Monthly category for the client. On the Income and Sales screen, you can then repeat all your Monthly clients’ previous invoice instead of typing the invoices every month.





- Supplier Categories
- Expense Categories
- Income Categories
- Different Medical Aids
- Bank Names
- Postal Codes
- Passwords

These passwords get used by cashiers on Point of Sale (Additional Module). The format is as follows: 1234/Theresa#013

First 4 characters is the password the cashier logs in with, followed by a '/', then the name like it should display on the receipt, followed by a '#' and the Employee No as indicated on the Employee Master screen.

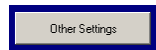
Update Tax tables

Available once a year when released by Government (usually in June)

Mail Data (Support Function)

Enter the e-mail address where database should be sent to, this would usually be info@ezee.co.za

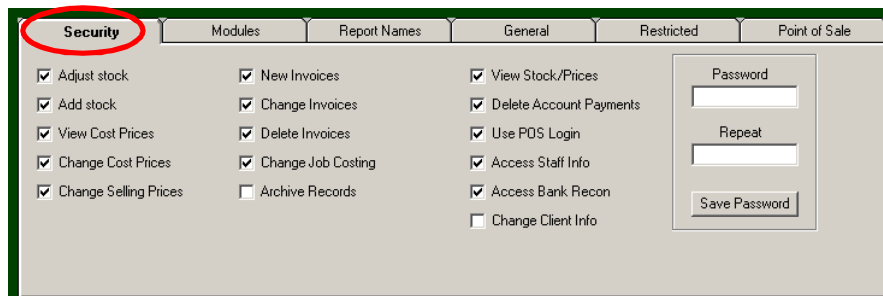
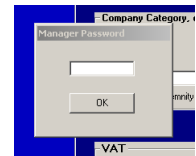
10 By clicking "Other Settings" one customises additional features and security setting of the software



Security

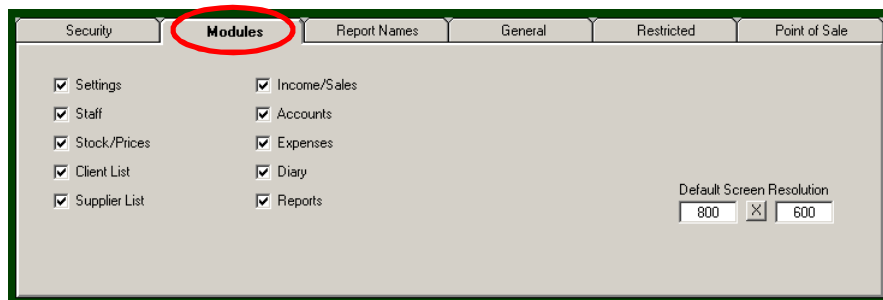
You can set up a managers password that will give you access to certain modules and functions, depending on certain settings. To do this, type your password in the first textbox and repeat it in the next textbox. Then click on Save Password.

By removing any of the ticks in the boxes, that function will not be available unless one enters the saved password.



Modules

The modules on the main screen can be disabled. Take off the tick to restrict access to a specific module.





Report Names

Certain printouts or reports have been changed on request. To use a non-standard report that was developed specifically for you, change the name here.

Security	Modules	Report Names	General	Restricted	Point of Sale
Invoice Name	<input type="text" value="rptInvoiceBOM.rpt"/>	POS Receipt	<input type="text" value="rptPosReceipt.rpt"/>	Quote Name	<input type="text" value="rptQuoteRBow.rpt"/>
Payslip Name	<input type="text" value="rptPayslip.rpt"/>	F. Form Name	<input type="text" value="rptFunForm.rpt"/>	CashUp report	<input type="text" value="rptCashUp.rpt"/>
JobCard Name	<input type="text" value="rptJobCard.rpt"/>	Member Receipt	<input type="text" value="rptPolicyReceipt.rpt"/>		
Delivery Note	<input type="text" value="rptPod.rpt"/>	Statement Name	<input type="text" value="rptStatement.rpt"/>		

General

Security	Modules	Report Names	General	Restricted	Point of Sale
PAYE Calculation <input checked="" type="radio"/> Per Period <input type="radio"/> Cumulative		Calculation factors Labour <input type="text" value="250"/> Petrol <input type="text" value="4"/> Unit Rate <input type="text"/>		<input checked="" type="checkbox"/> Auto Employee Numbering <input checked="" type="checkbox"/> UIF on Basic Income: <input type="checkbox"/> Commission on Profit only <input type="checkbox"/> Use Price Rounding <input checked="" type="checkbox"/> Percentage Markup (blank for Gross) <input checked="" type="checkbox"/> Account Payments linked to Invoices	
Tax Table Date <input type="text" value="01/03/2009"/> -->		Overdraft Limit <input type="text" value="0"/>			
Working Hours per week: <input type="text" value="45"/>		<input checked="" type="checkbox"/> Calendar Adjustment			
Custom Button No's: <input type="text" value="79"/> <input type="text" value="0"/> <input type="text" value="0"/>					

Set PAYE Calculations.

Set Tax table Date – the first day of the financial year.

Set Working Hours Per Week

Custom Buttons – For eZee internal use when we develop customised features for clients.

Calculation Factors

Labour - Capture the labour rate per unit, e.g. R75.00 per day. An hourly rate can also be captured. Whatever is captured here must be used accordingly on the Income/Sales screen. For example, if workers cost the company R25.00 per hour per worker on average, the amount to be entered here is R25.00.

Petrol - Capture the rate per unit, e.g. amount per kilometre / trip. Decide what will be more practical to use and enter the amount here, for example, if most transactions involve a trip of about 70km, a calculation should be made of the cost per trip and the amount entered here. If there is no proper average, it is better to enter the cost per km here.

Unit rate – Not normal salary. Pay per basket.

Learn more about these factors in the Income section.

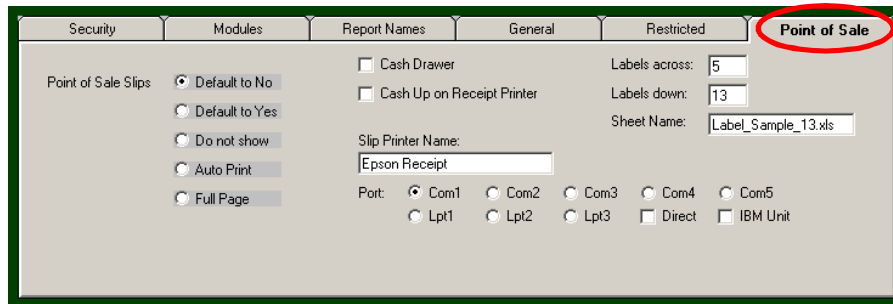
Restricted

Gets used by eZee Agents to enable additional modules.





Point of Sale (Add On Module)



Point of Sale Slips set the way which slips are printed – by default or not, no slip at all, automatically printing the slips...or printing a full page slip.

If there is a cash drawer connected tick “Cash Drawer”

If the Cash Up needs to be on the receipt printer tick “Cash Up on Receipt Printer”. If this is not ticked the cash up will be printed on the default printer as set in the Operating System Settings.

“Slip Printer Name & Port” is used to identify the receipt printer, it’s drivers and how it is connected to the computer.

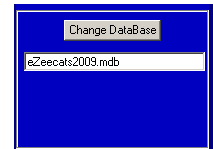
The label part is used to set up the format of the label sheets which will be used for printing bar code labels.

POS setup is usually done by the eZee technician installing the system.

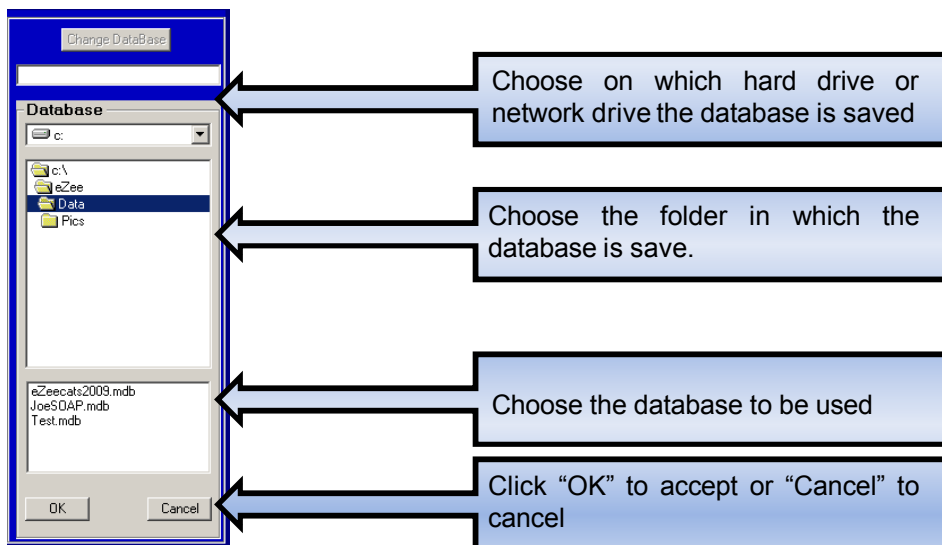
Click on “Hide” to exit the “Other Settings” screen



- 11** By clicking on “Change DataBase” one chooses in which database to work. The database contains all the information relevant to the business. Numerous companies can use the system **on the same computer**. The number of companies is only restricted by available hard disk space. A separate database should be created for every individual company.

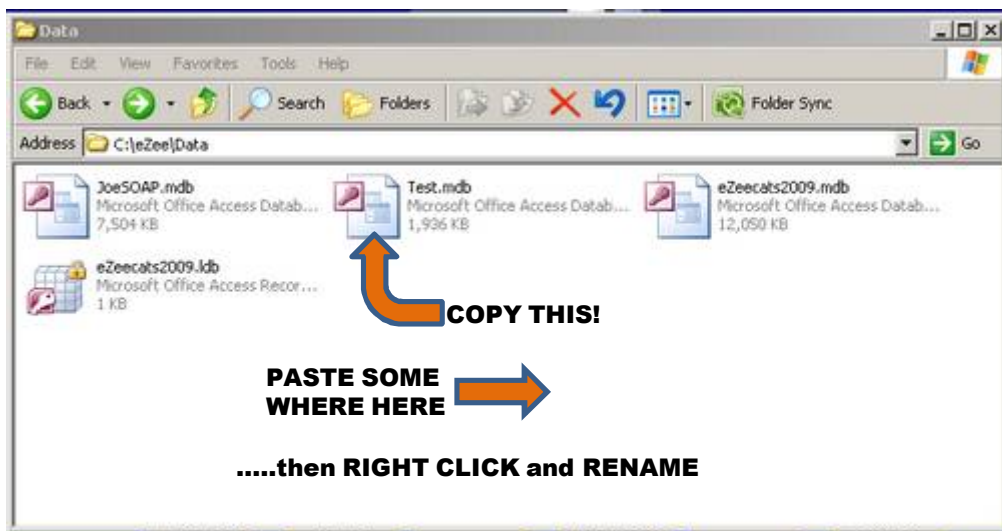


Click Change Database, the following will appear:





It is a good idea to never use the master database, because whenever a new database is created, the data that was captured in the master database will be in the new database. In “Explorer” copy the database which was created during installation. Paste it in the same location. Rename it to the name of the business. A working database is now created.



- 12** Clicking on “Change Logo” allows one to put the company’s logo into the software. The logo then displays on the quotes, invoices, statements, delivery notes, job cards, pay slips (eZee Business Management Software – Full Version) etc. The logo should be in “.jpg” or “.bmp” format, and one should know where it is saved.

