



CUSTOM TEMPLATE HELP GUIDE

ABOUT THIS HELP GUIDE

This mini-guide was created to help you with the installation and set-up of your custom ProfitTrain invoice template, as well as to equip you to make custom text changes on the fly.

Version: 1.0

Date: April 23, 2012

Programming Languages: ProfitTrain and its template system are rooted in MGTemplateEngine (a native Cocoa system). In turn, the template also uses XML, HTML, PHP, and CSS.

Please note:

- you do not need to have any prior programming experience in order to install nor modify this template. All steps are clearly detailed, step by step, with screenshots.
- The template was custom-coded, with the client's desired features pre-installed with the ability to toggle them on and off. Further modification is only needed, if your business' needs should change in the future.

I sincerely hope that you enjoy the use of your new ProfitTrain template. Please don't hesitate to let me know if I can be of further assistance. Thank you for your business!

All the best,

Jammes

Jammes Lockett, Developer

Art Mechanix

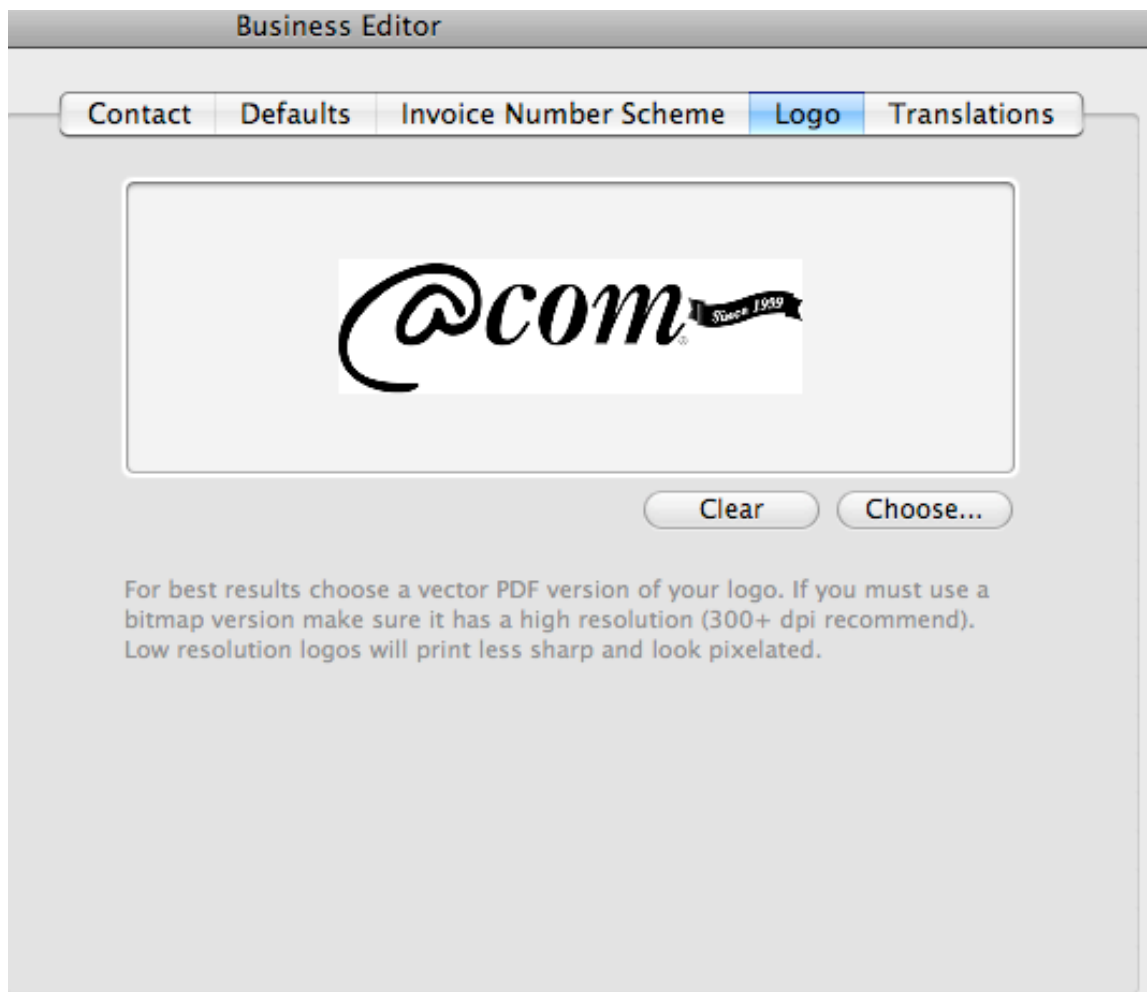
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INSTALLATION

To install:

1. Quit the ProfitTrain application, if it is not already closed.
2. On your computer, go to **HD/user/Application Support/ProfitTrain/InvoiceTemplates**
3. Place your atCommunications template file into that folder.
4. Re-start ProfitTrain.
5. After selecting a business, a client, and an invoice, you will see your template in the dropdown menu at the bottom of the screen. This means the template has been successfully installed.
6. Select your template from the dropdown menu.
7. Open The Business Editor, click on the Logo tab, and select your logo image from your computer. Note Profit Train's recommendations for image resolution.

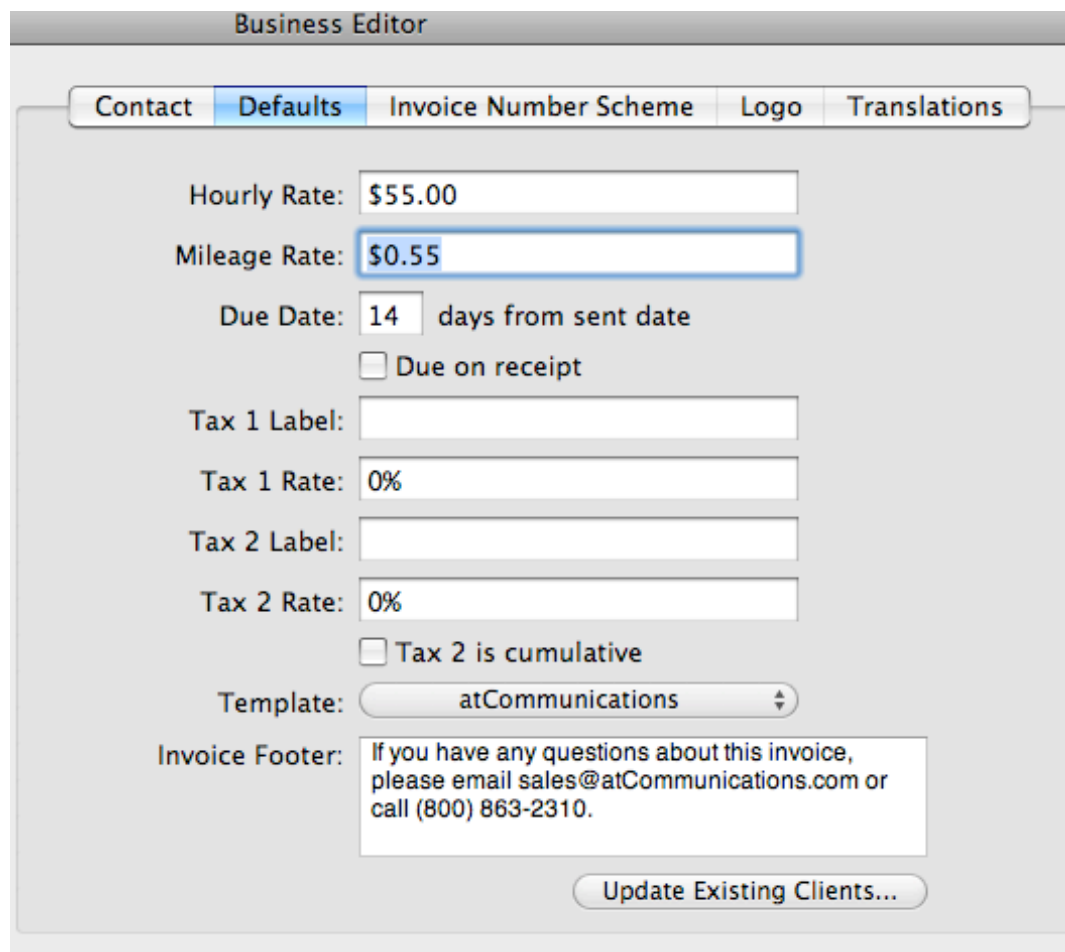


GETTING STARTED

Make sure that your business information is completed in the appropriate fields and that it is accurate. The info you enter here will display within your actual invoices. For this template, you will need to set up the Business Editor:

Here, you can make your own custom changes to applicable fields. After you've finished, click 'Update Existing Clients'. In the pop-up window, check off the boxes for any fields that you altered (Ex. "Footer" to update all client invoices with the new footer). Then, click 'Refresh / Rebuild PDF'.

NOTE: The "Thank you for choosing" section of your template is hard-coded in the HTML to accommodate formatting differences. However, all other text that appears on the invoice can be changed instantly by refreshing / rebuilding of the PDFs after making changes in the editor window.



The screenshot shows a window titled "Business Editor" with a tabbed interface. The "Defaults" tab is selected. The settings include:

- Hourly Rate: \$55.00
- Mileage Rate: \$0.55
- Due Date: 14 days from sent date
- ☐ Due on receipt
- Tax 1 Label: (empty)
- Tax 1 Rate: 0%
- Tax 2 Label: (empty)
- Tax 2 Rate: 0%
- ☐ Tax 2 is cumulative
- Template: atCommunications
- Invoice Footer: If you have any questions about this invoice, please email sales@atCommunications.com or call (800) 863-2310.

At the bottom right, there is a button labeled "Update Existing Clients..."

The 'Update Existing Clients' button (shown above), can be used for any updates that you also wish to apply to pre-existing templates and/or invoices.

Since you can operate more than one business in ProfitTrain, you can use this button to force all clients of the active business to be assigned a new template, footer, tax settings, rates and more from an entirely different business. **If you only want changes to apply to certain clients (but not all), then you will need to change settings via the individual Client Inspector window on the main dashboard page.**

INVOICE NUMBERING

Here's where you may change the invoice numbering scheme to your liking. Changes will automatically save and be applied when you next launch a new invoice.

Business Editor

Contact

Defaults

Invoice Number Scheme

Logo

Translations

Generated invoice numbers should include:

☐ Month

☐ Client Name

☐ Day

☒ Next Business Number

☐ Year

☐ Next Client Number

10003

Client Inspector

(Business) 1

Drag tokens to change order. Insert custom text by typing.

Clear

Regenerate Invoice Numbers

?

TRANSLATIONS: TEXT CUSTOMIZATION

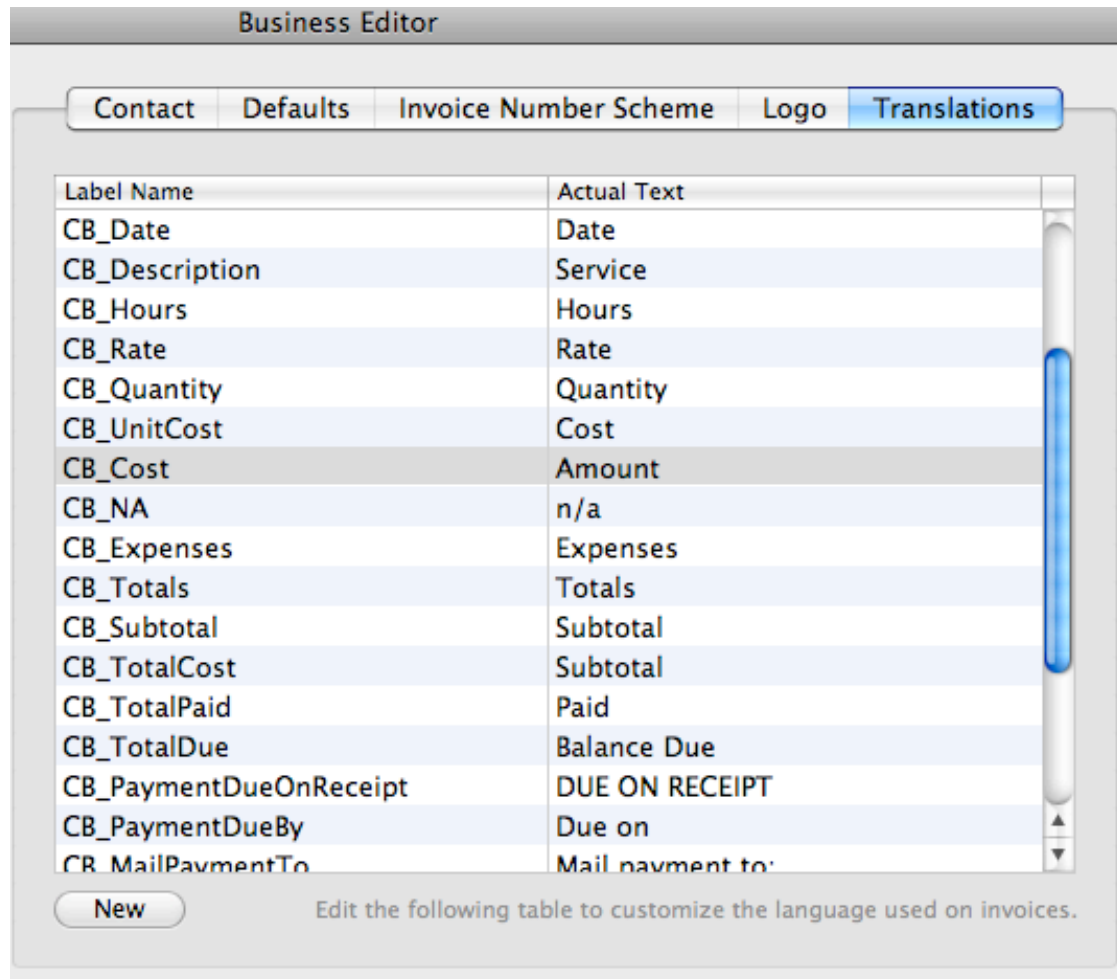
Your template comes with your custom text requests pre-installed within the underbelly of ProfitTrain. However, if you have second thoughts on certain words / phrases and want to make changes, you can do so quickly.

ProfitTrain has a feature called “Translations” that can be used for this. It’s located in your Business Editor, in the Translations tab.

The ‘Label Names’ correspond to HTML tags hard-coded within your template file. You do not need to change these labels unless you have changed them within the HTML file. If you should later add *additional* labels to the HTML file, you will need to create matching Label Names and text in this window. To do so, click ‘New’ and add the tag. Then, click once on another field to “lock” in the change.

In the right hand column (“Actual Text”), you can double click on a field you’d like to change and type the replacement word. Then, click once on another field to “lock” in the change.

Example: If you want the word “Amount” to read as “Total” instead, simply find the word “Amount” in the list and double-click it. When prompted, type the word “Total”, and click on another field to set the text. Look at your template to make sure the text appears where you intended.



The screenshot shows the 'Business Editor' window with the 'Translations' tab selected. The window has a title bar 'Business Editor' and a tab bar with 'Contact', 'Defaults', 'Invoice Number Scheme', 'Logo', and 'Translations'. Below the tabs is a table with two columns: 'Label Name' and 'Actual Text'. The table contains 19 rows of data. The row with 'CB_Cost' and 'Amount' is highlighted. Below the table is a 'New' button and a text prompt: 'Edit the following table to customize the language used on invoices.'

Label Name	Actual Text
CB_Date	Date
CB_Description	Service
CB_Hours	Hours
CB_Rate	Rate
CB_Quantity	Quantity
CB_UnitCost	Cost
CB_Cost	Amount
CB_NA	n/a
CB_Expenses	Expenses
CB_Totals	Totals
CB_Subtotal	Subtotal
CB_TotalCost	Subtotal
CB_TotalPaid	Paid
CB_TotalDue	Balance Due
CB_PaymentDueOnReceipt	DUE ON RECEIPT
CB_PaymentDueBy	Due on
CB_MailPaymentTo	Mail payment to:

New Edit the following table to customize the language used on invoices.