

# BUZ Invoicing and Credits



# Invoicing

**Invoicing** and receiving payment from your customers is a critical part of running your business.

In BUZ the order is usually invoiced when the product is delivered/installed (Completed)

Although the order can be manually invoiced at any time.

Once the order has been invoiced in BUZ the order/invoice cannot be edited or processed.



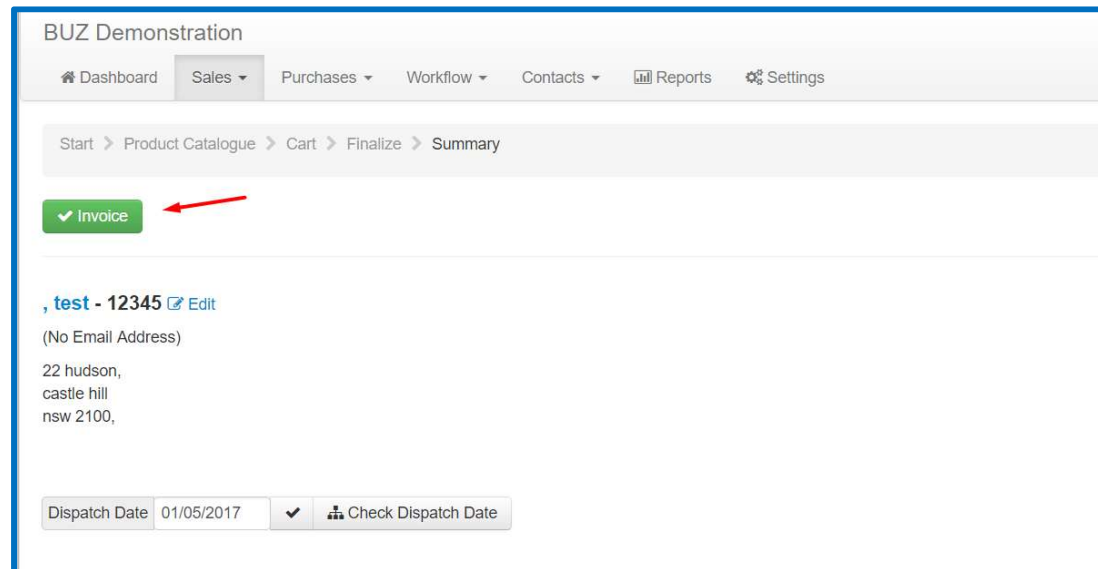
# Invoicing

## 1. Manual invoicing of an order

To manually invoice an order the order will need to have passed a few processes within the workflow if required such as;

- Discount Approval
- Deposit Approval
- Check Measure complete

Once these processes are complete if the order did require them then you will have access to invoice the order from the quote summary screen.

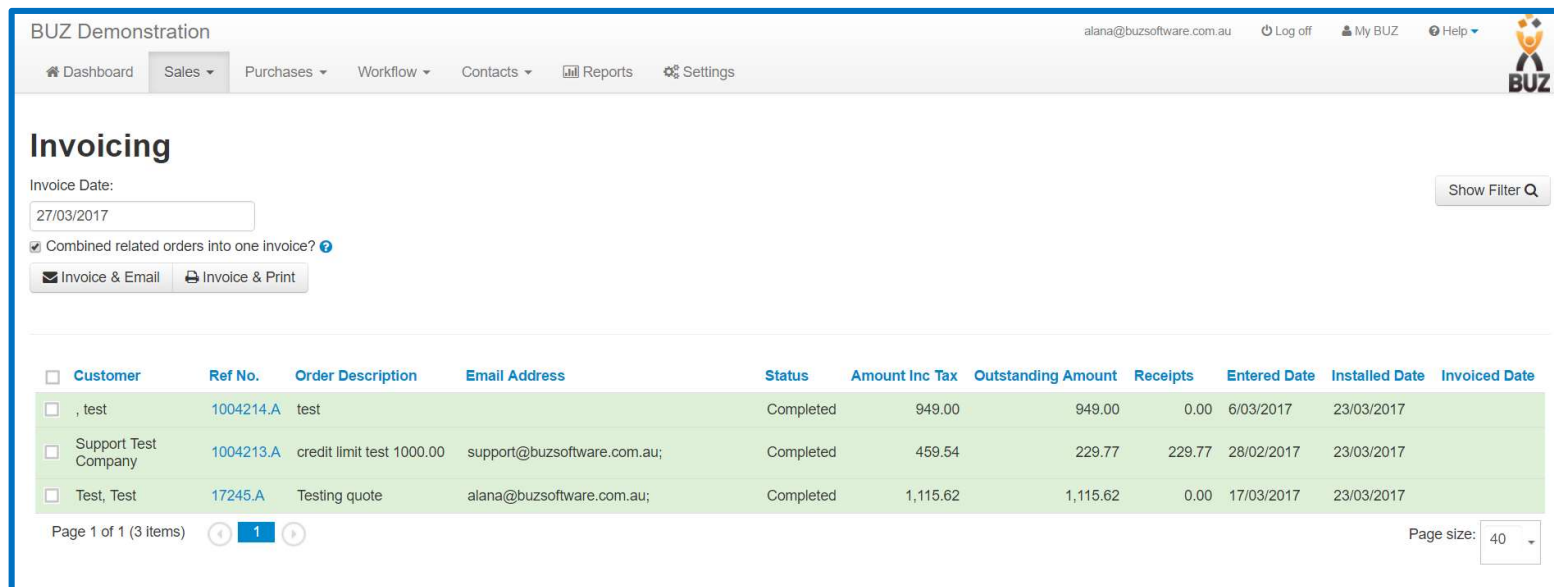
A screenshot of the BUZ Demonstration software interface. The top navigation bar includes "Dashboard", "Sales", "Purchases", "Workflow", "Contacts", "Reports", and "Settings". Below this is a breadcrumb trail: "Start > Product Catalogue > Cart > Finalize > Summary". A green button with a checkmark and the text "Invoice" is highlighted with a red arrow. Below the button, the order details are displayed: ", test - 12345" with an "Edit" link, "(No Email Address)", and the address "22 hudson, castle hill, nsw 2100,". At the bottom, there is a "Dispatch Date" field set to "01/05/2017" and a "Check Dispatch Date" button.

# Invoicing

## 2. Bulk Invoicing

### Sales -> Invoicing

When an order has been scanned or set to Completed in Dispatch and it has not been invoiced prior you will find a list of these Completed orders in Sales -> Invoicing



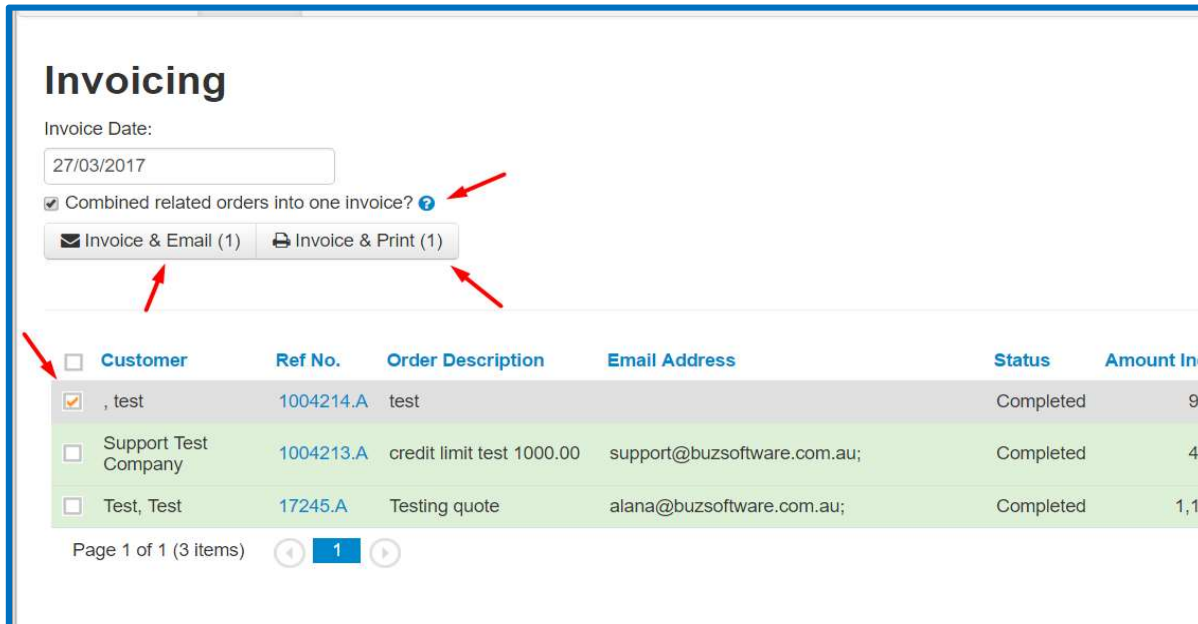
The screenshot shows the 'Invoicing' section of the BUZ software interface. At the top, there is a navigation bar with 'Sales' selected. Below the navigation bar, the 'Invoicing' title is displayed. The interface includes an 'Invoice Date' field set to '27/03/2017', a 'Show Filter' button, and a checkbox for 'Combined related orders into one invoice?'. There are two buttons: 'Invoice & Email' and 'Invoice & Print'. Below these is a table of orders with columns for Customer, Ref No., Order Description, Email Address, Status, Amount Inc Tax, Outstanding Amount, Receipts, Entered Date, Installed Date, and Invoiced Date. The table contains three rows of data. At the bottom, there is a pagination control showing 'Page 1 of 1 (3 items)' and a 'Page size' dropdown set to '40'.

<input type="checkbox"/>	Customer	Ref No.	Order Description	Email Address	Status	Amount Inc Tax	Outstanding Amount	Receipts	Entered Date	Installed Date	Invoiced Date
<input type="checkbox"/>	, test	1004214.A	test		Completed	949.00	949.00	0.00	6/03/2017	23/03/2017	
<input type="checkbox"/>	Support Test Company	1004213.A	credit limit test 1000.00	support@buzsoftware.com.au;	Completed	459.54	229.77	229.77	28/02/2017	23/03/2017	
<input type="checkbox"/>	Test, Test	17245.A	Testing quote	alana@buzsoftware.com.au;	Completed	1,115.62	1,115.62	0.00	17/03/2017	23/03/2017	

# Invoicing

When you are ready to Invoice these orders you can

- Click on the Invoice to invoice and add any Extras / Invoice Extras that are required
- Click on Multiple invoices and select Print and Invoice or Email and Invoice
- Click on multiple invoices for the same company with the same reference and select Combine multiple invoices into 1 (this is used when you have multiple invoices for 1 campaign or are billed periodically)



**Invoicing**

Invoice Date:  
27/03/2017

Combined related orders into one invoice? ⓘ

Invoice & Email (1)  Invoice & Print (1)

<input type="checkbox"/>	Customer	Ref No.	Order Description	Email Address	Status	Amount Inc
<input checked="" type="checkbox"/>	, test	1004214.A	test		Completed	94
<input type="checkbox"/>	Support Test Company	1004213.A	credit limit test 1000.00	support@buzsoftware.com.au;	Completed	45
<input type="checkbox"/>	Test, Test	17245.A	Testing quote	alana@buzsoftware.com.au;	Completed	1,11

Page 1 of 1 (3 items) 1

Once invoiced the order is then processed to Xero (If you are intergraded with Xero )  
Click the link below to view the Accounting Integration and the order and payment life cycle

[Accounting Software Integration](#)

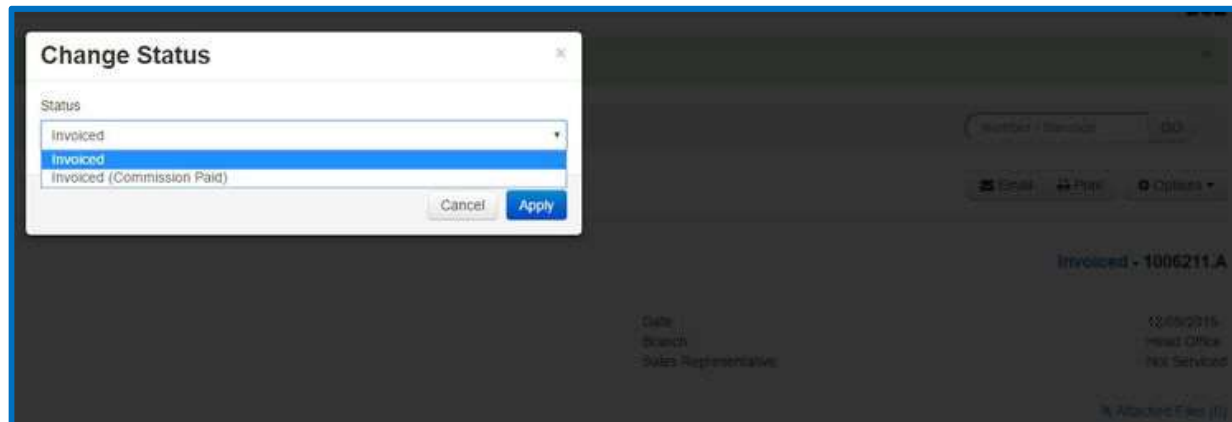
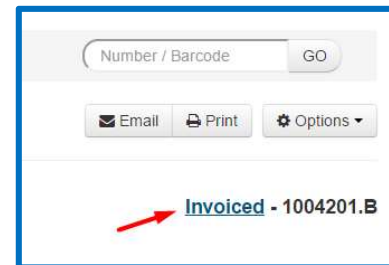
# Invoicing

## 3. Multiple Invoice statuses

You can have multiple invoice statuses setup with the same function. This allows you to invoice the order and go through a process of statuses as required.

See below example

1. Invoice order
2. Select the status invoiced on the RHS
3. Select from the drop down list of statuses.

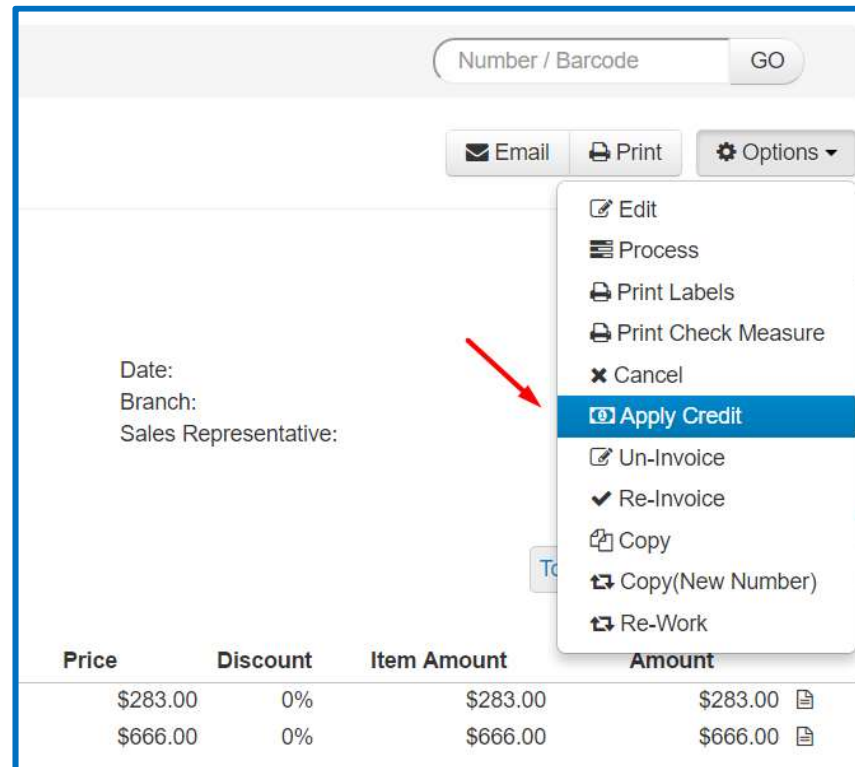


The statuses can be setup in sales settings → [Lead Status & Order Status](#)

# Credit Notes

Credit notes are created once the order has been completed/invoiced.

On completion you have the option to apply credit *Options-> Apply Credit*



The screenshot shows a software interface for a credit note. At the top, there is a search bar labeled "Number / Barcode" with a "GO" button. Below this are three buttons: "Email", "Print", and "Options". The "Options" dropdown menu is open, showing a list of actions: "Edit", "Process", "Print Labels", "Print Check Measure", "Cancel", "Apply Credit" (highlighted in blue), "Un-Invoice", "Re-Invoice", "Copy", "Copy(New Number)", and "Re-Work". A red arrow points to the "Apply Credit" option. Below the menu, there are labels for "Date:", "Branch:", and "Sales Representative:". At the bottom, there is a table with columns: "Price", "Discount", "Item Amount", and "Amount".

Price	Discount	Item Amount	Amount
\$283.00	0%	\$283.00	\$283.00
\$666.00	0%	\$666.00	\$666.00

# Credit Notes

The credit note is then created and you can amend the credit amount if needed.  
 (Note that the credit amount is be in in minus)

The credit note will be allocated to the original order once the credit note has been accepted.

Number / Barcode

**Invoiced - 1004201.B**

27/03/2017  
Head Office  
Neil

representative:

[Attached Files \(0\)](#)

Total: 1140.00

Count	Item Amount	Amount
0%	\$570.00	\$570.00
0%	\$570.00	\$570.00
Subtotal		\$1,140.00
Tax		\$103.64
<b>TOTAL</b>		<b>\$1,140.00</b>
Less Credit (11636) (1004201.D) 28 Mar 17		\$100.00
<b>AMOUNT DUE</b>		<b>\$1,040.00</b>

Number / Barcode

**credit note - 1004201.D**

28/03/2017  
Head Office  
Neil

representative:

[Attached Files \(0\)](#)

Total: -100.00

Count	Item Amount	Amount
0%	-\$50.00	-\$50.00
0%	-\$50.00	-\$50.00
Subtotal		-\$100.00
Tax		-\$9.09
<b>TOTAL</b>		<b>-\$100.00</b>
Plus Credit (11636) (1004201.B) 28 Mar 17		-\$100.00
<b>REMAINING CREDIT</b>		<b>\$0.00</b>



## Credit Notes

Once the credit note has been accepted the statement will show the original order value minus the credit note amount

Example below;

Original order           \$1,140

Credit note amount   \$100

Amount unpaid         \$1,040

Invoice Date	Reference	Invoice Total	Amount Unpaid	Running Balance
27/03/2017	Invoice 1004214.A - 27/03/2017	\$949.00	\$949.00	\$949.00
28/03/2017	Invoice 1004201.B - 28/03/2017	\$1,140.00	\$1,040.00	\$1,989.00

**BUZ SOFTWARE**  
ABN: 93 787 045 540  
605 Zillmere Rd, Aspley Qld 4034

**BUZ Demonstration**  
Trading as BUZ Software

**Statement Date:** 28/03/2017  
**Customer Code:** TEST2100.LOT

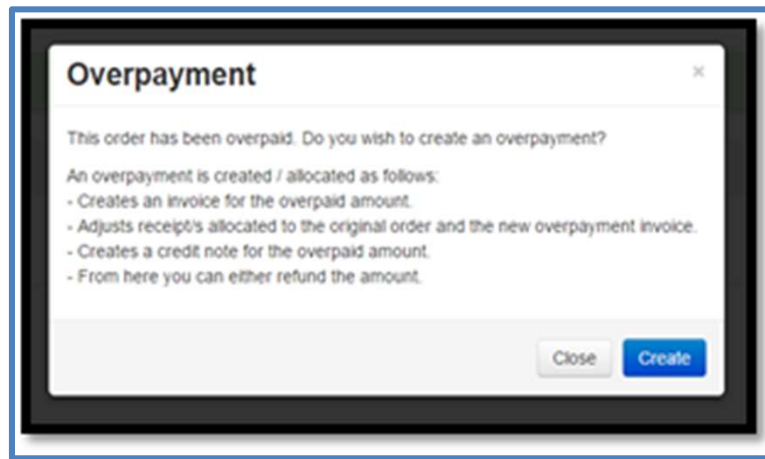
To:  
, test

**Statement**

# Overpayments

If a Customer has paid and order for X amount and then the order is changed to Y amount when you change the order to be Y amount a Dialog Box will appear asking you to "Create Overpayment" this automatically

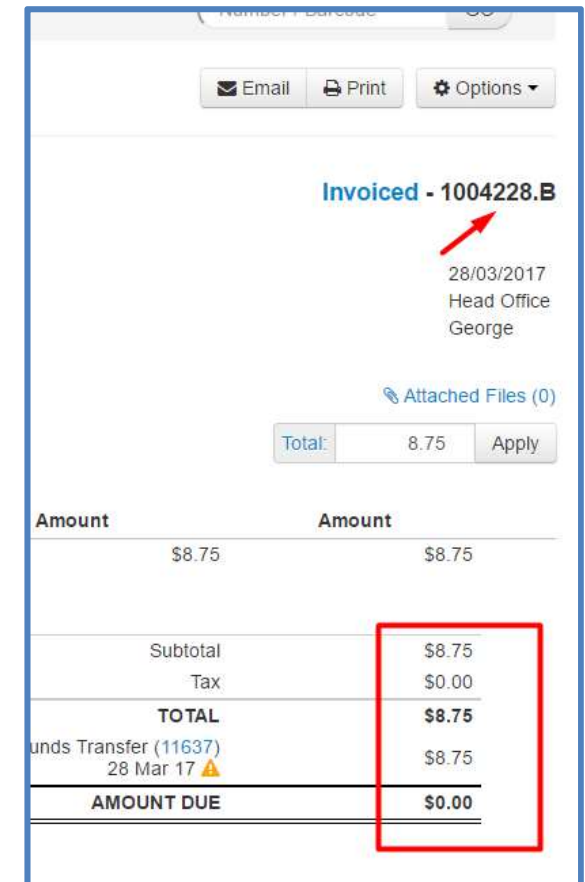
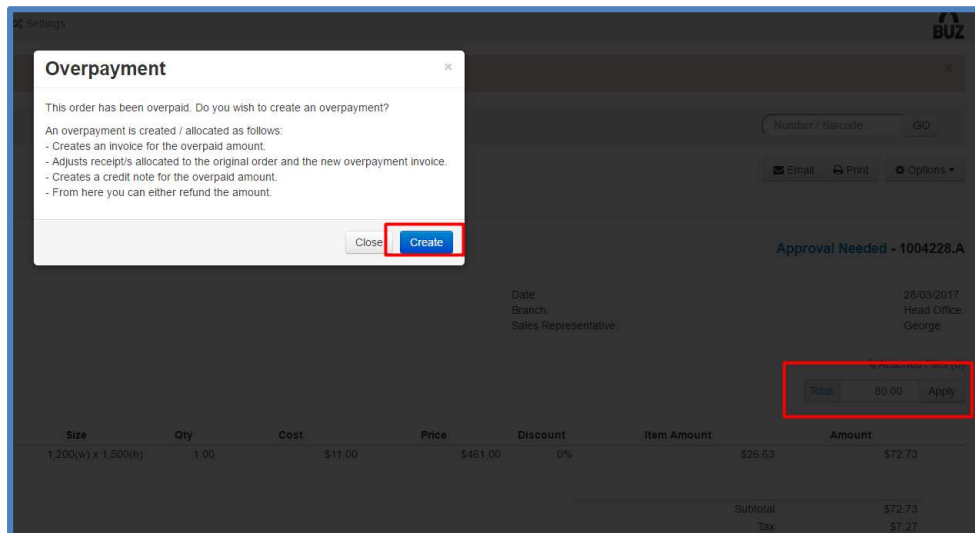
1. Creates an Invoice for the difference between X and Y
2. Adjusts the initial payment to be corrected
3. Creates a Credit Note for the overpayment
4. Allowing you then to refund the difference



# Overpayments

IE: Order "1004228.A" is placed for \$88.75 with a full payment of \$88.75

Order amount is changed to \$80.00 and the dialog Box appears



On selecting "Create"

1. Invoice is created for overpayment of \$8.75 on Number "B"

# Overpayments

2. Payment on "A" is changed to be \$80.00

3. Credit Note is created for -\$8.75 on number "c"

2.

**Approval Needed - 1004228.A**

28/03/2017  
Head Office  
George

Attached Files (0)

Total: 80.00 Apply

Amount	Amount
\$26.63	\$72.73
Subtotal	\$72.73
Tax	\$7.27
<b>TOTAL</b>	<b>\$80.00</b>
Payments Transfer (11637) 28 Mar 17	\$80.00
<b>AMOUNT DUE</b>	<b>\$0.00</b>

3.

**credit note - 1004228.C**

28/03/2017  
Head Office  
George

Attached Files (0)

Total: -8.75 Apply

Amount	Amount
-\$8.75	-\$8.75
Subtotal	-\$8.75
Tax	\$0.00
<b>TOTAL</b>	<b>-\$8.75</b>

4. This all flows to Xero and you are then able to refund the monies

## Notes

At this point in time a overpayment can only be done prior to the Order being Invoiced as once it is Invoiced it is Locked. We hope that a feature will be available in the near future for orders that are Invoiced.

Also BUZ does not have a refund feature so all refunds will need to be processed in your accounting software.



If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: [support@buzsoftware.com.au](mailto:support@buzsoftware.com.au)



A decorative background image showing a sunset or sunrise with a warm orange and yellow sky, white clouds, and a white horizon line.

# Thank you

Any further questions please contact us at  
[support@buzsoftware.com.au](mailto:support@buzsoftware.com.au)