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.

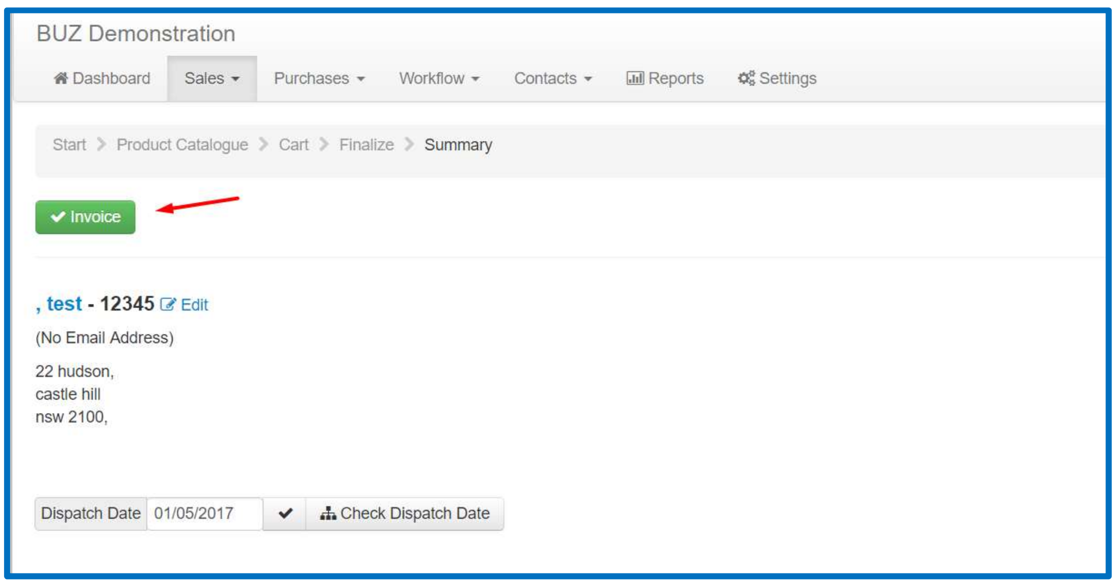
Invoicing

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.

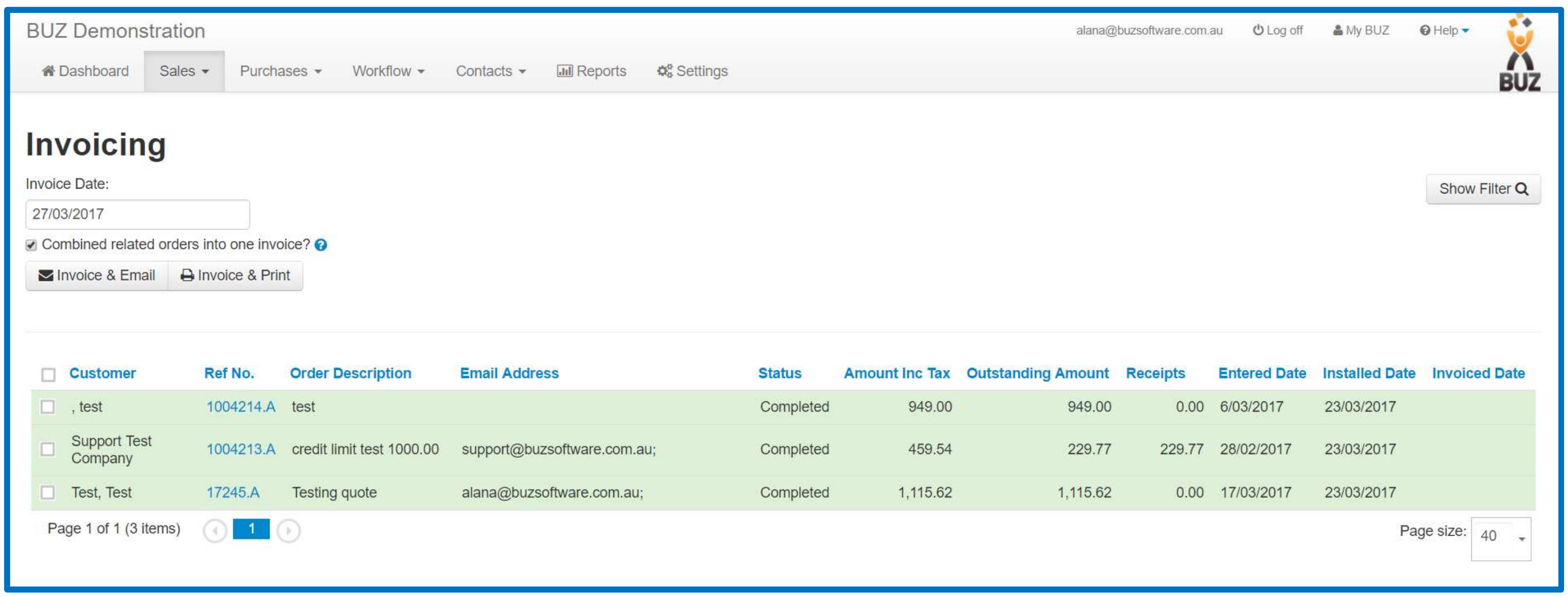


Invoicing

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



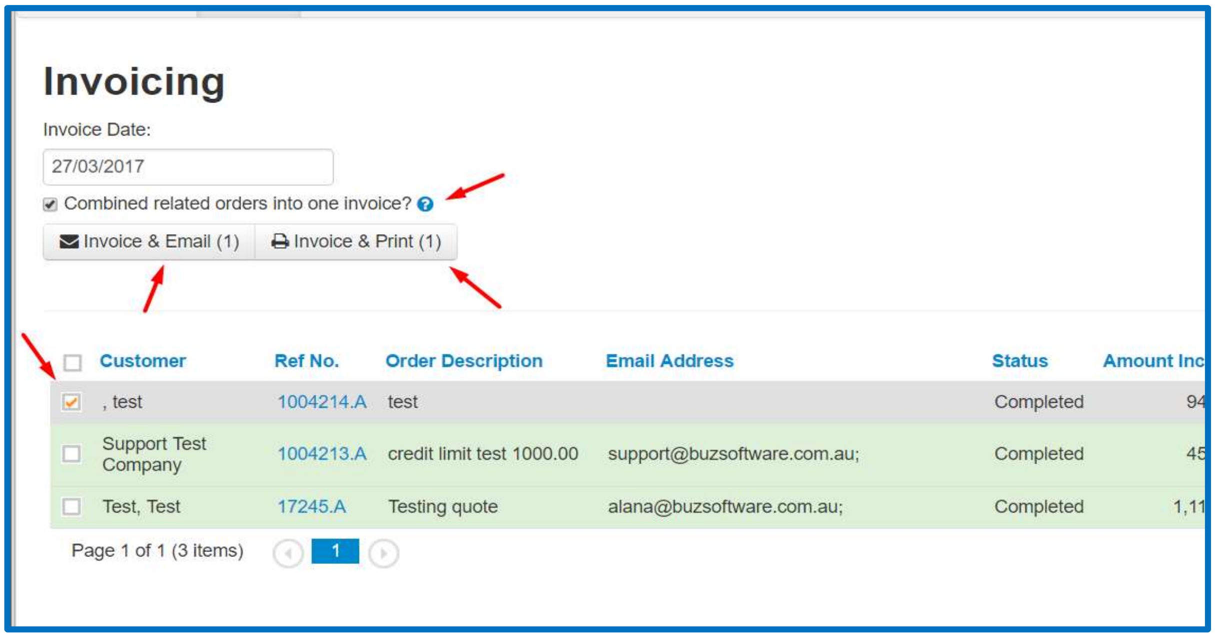
Invoicing

When you are ready to Invoice these orders you can

a) Click on the Invoice to invoice and add any Extras / Invoice Extras that are required

b) Click on Multiple invoices and select Print and Invoice or Email and Invoice

c) 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)



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

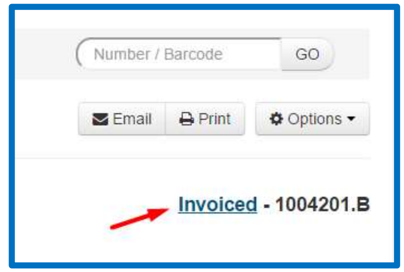
Invoicing

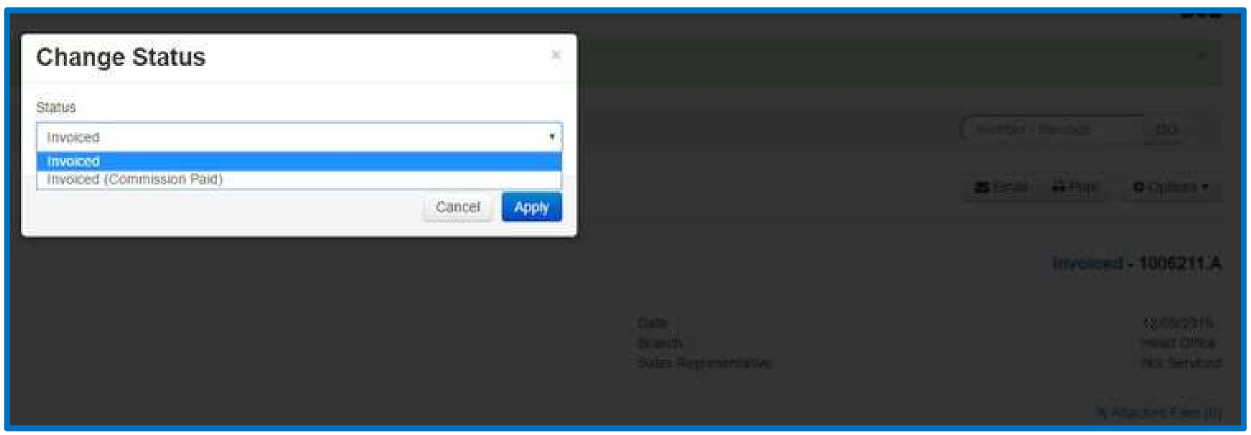
3. Multiple Invoice statuses

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.



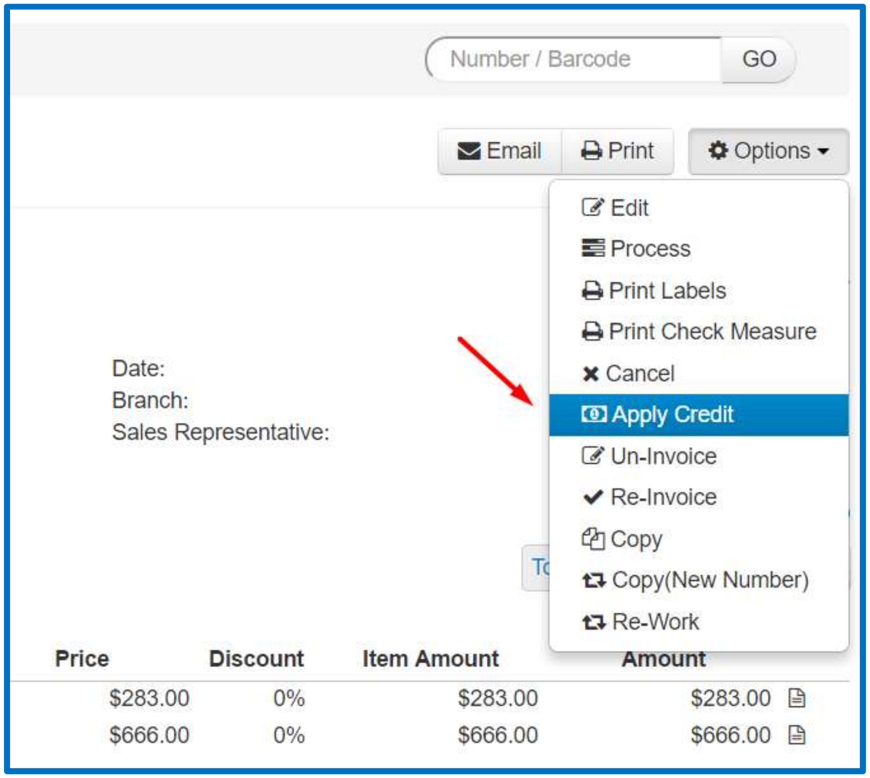


The statuses can be setup in sales settings → [Lead Status & Order Status]

Credit Notes

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

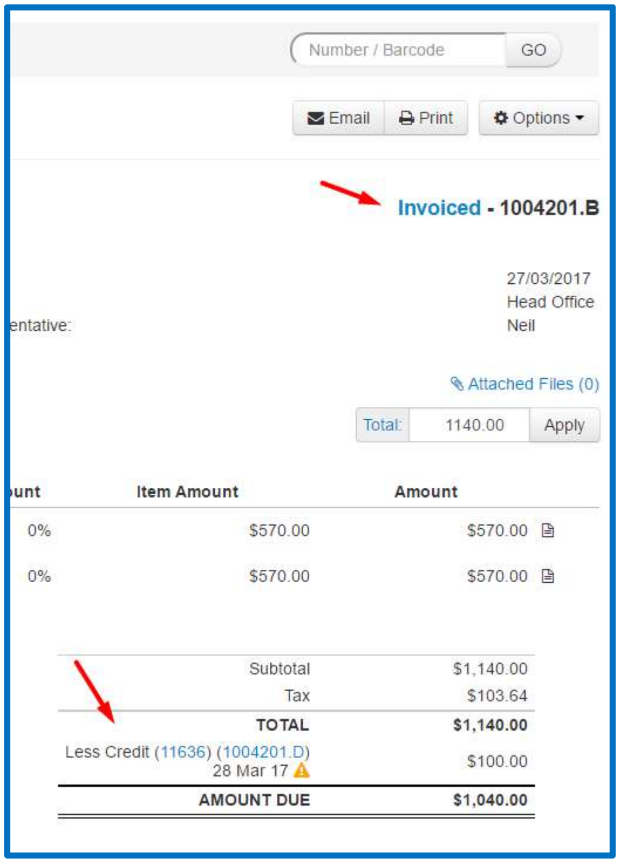
On completion you have the option to apply credit *Options-> Apply Credit*

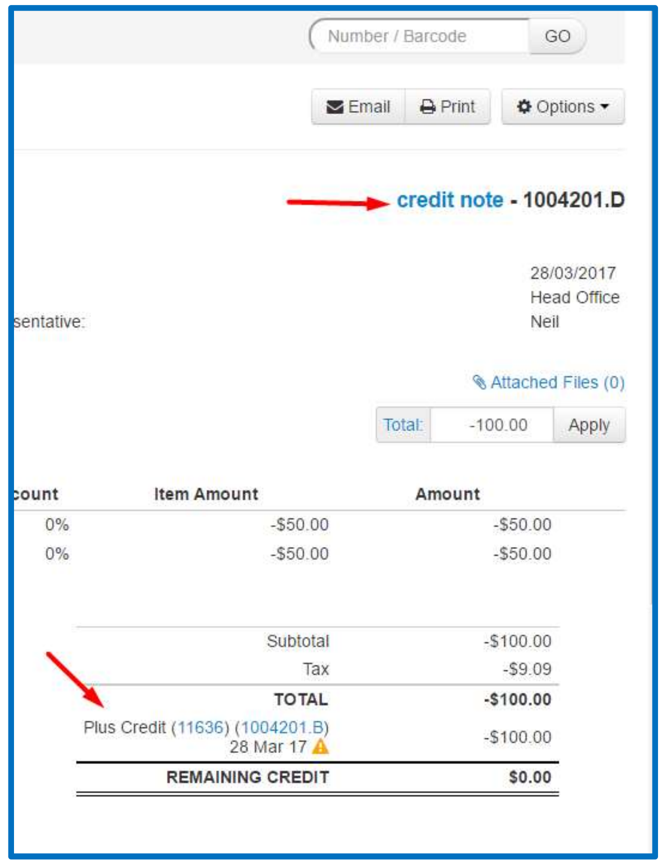


Credit Notes

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.





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

BUZ Demonstration
Trading as BUZ Software

To:
, test

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

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

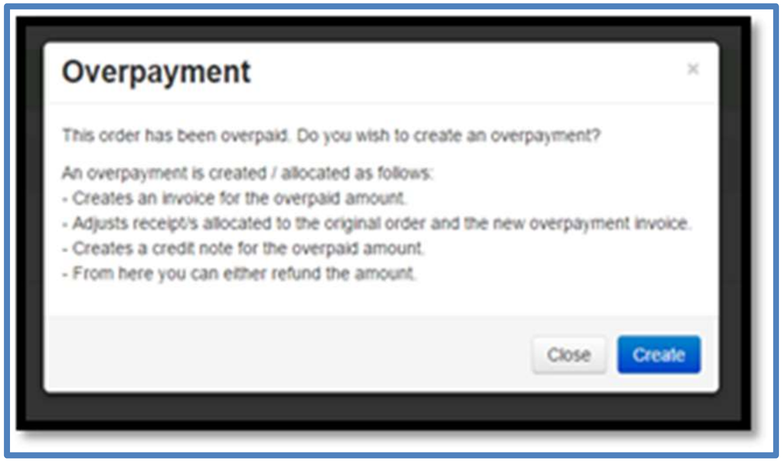
Statement

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

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

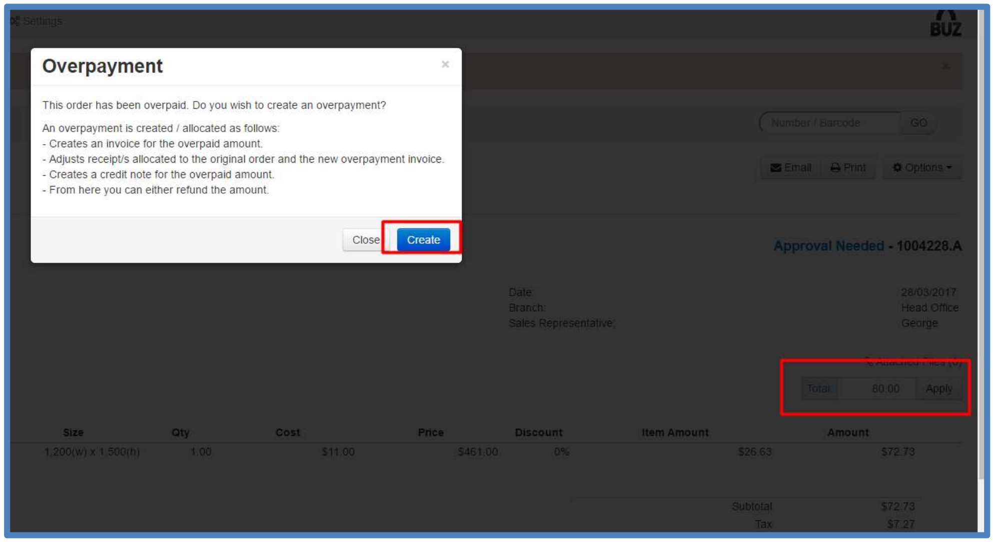
1. Creates an Invoice for the difference between X and Y
2. Adjusts the initial payment to be corrected
3. Creates a Credit Note for the overpayment
4. Allowing you then to refund the difference

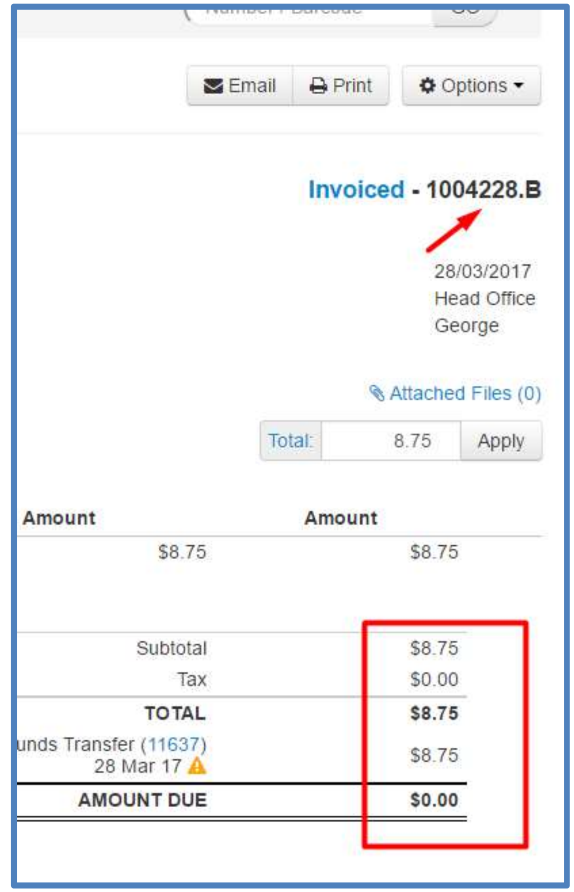


Overpayments

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



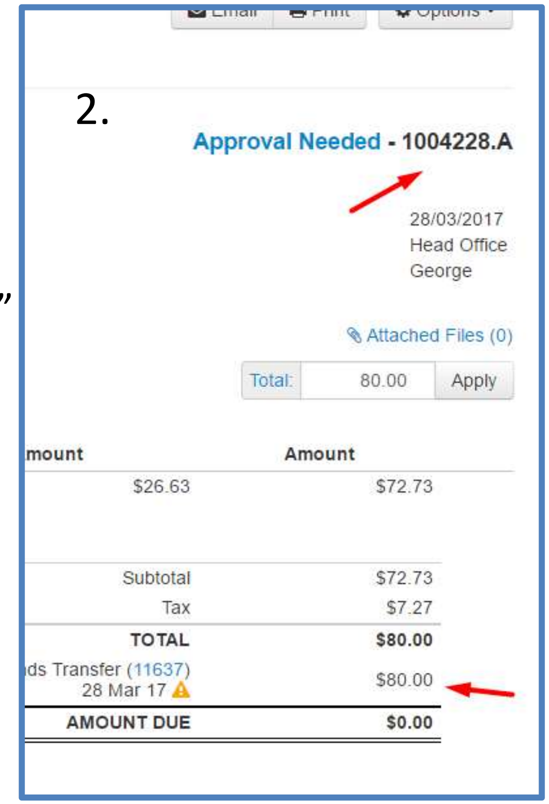


On selecting "Create"

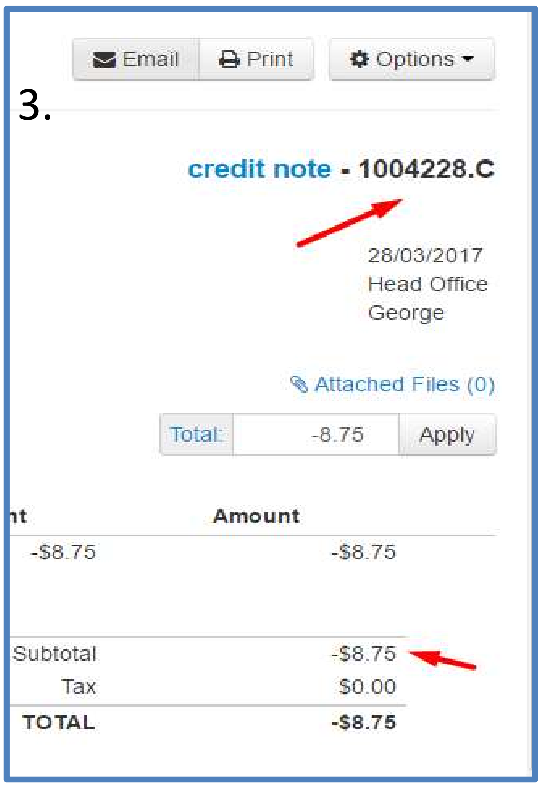
1. Invoice is created for overpayment of $8.75 on Number “B”

Overpayments

2. Payment on “A” is changed to be $80.00



3. Credit Note is created for -$8.75 on number “c”



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

Thank you

Any further questions please contact us at

support@buzsoftware.com.au