

# Getting Started Manual For Progress Invoicing

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**Reminder:** Please subscribe “Progress Invoicing” add-on before perform this step, otherwise you might unable to activate it.

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- 1 Go to **Preferences** (under **Company** module).
- 2 Tick on **Enable Progress Invoicing**.
- 3 **Save**.
- 4 After done, you may start record your transaction via progress invoicing feature.

*Note: To subscribe, go to Billing > My Subscription screen, then look for "Progress Invoicing" add-on.*

## Step 2: Create Sales Quotation

Dashboard
New<sup>(Shortcut)</sup>
Company
**Customer**
Supplier
Banking
Stock
General Ledger
Tax

Sales Quotation
GST Mode

Customer\*
H0001
Haslinda

Address
176, Jalan Kewangan, Taman Kiambang
City:
Kulai
State:
Johor
Post Code:
81000
Country:
Malaysia
Contact:

Date\*
18/Nov/2024
Payment Terms
Net 30 days
Location
Beko

Quotation No.\*
Auto-generated
Tags
Salesperson
Remark

Currency\*
MYR
1
Get rate

Enter Barcode
Click on the button next to the price to view Item Info.
☐ Discount by %
Amount is:
Tax Exclusive

	Item Code*	Description	Image	Quantity	UOM	Unit Price	Discount	Tax Code	%	Amount (RM)*
2	555088018	Air Jordan 1 Retro High OG USA8		10.000000	unit	550.000000	\$	SR_S	6.00	5,500.00

Add line

Subtotal
5,500.00
SR\_S (6%)
330.00
Grand Total
RM
5,830.00

Actions
Print / Email
Show Transferred Doc
Copy to New
New
Save
Go to list

1 Go to **Sales Quotation** (under **Customer** module).

2 Fill in all product/service.

**Sales Quotation**
GST Mode

Customer\* H0001 Haslinda

Address 176, Jalan Kewangan, Taman Kiangbang

City: Kulai

State: Johor

Post Code: 81000

Country: Malaysia

Date\* 18/Nov/2024

Payment Terms Net 30 days

Location Beko

Quotation No.\* Auto-generated

Tags

Salesperson

Remark

**More Info**

**More Info**

Up to 6 user defined field is allowed.

Example 1: Label = 'Project Title', Value = 'Room Renovation'.  
Example 2: Label = 'Loan Amount', Value = 'RM 10000'.

Label	Value
Item Name	Air Jordan 10 1 Retro High OG USA8
Item Quantity	10
Delivery Date	28th January 2025

**Add line**

Note: When transfer from multiple documents, system will pick up the 'More Info' from last transferred document, and merge with existing saved 'More Info'. Only last 6 Labels will be included.  
User defined field would be printed out except for simplified tax invoice and those been customized.

**Ok**

% Amount is: Tax Exclusive

Code	%	Amount (RM)*
	6.00	5,500.00

**Subtotal** 5,500.00

**SR\_S (6%)** 330.00

**Grand Total RM** 5,830.00

**Save**

**Go to list**

- 3 Click **More Info** to bring out a pop up.
- 4 Add additional info such as project title.
- 5 Click **OK**.
- 6 **Save**.

*Note: You may provide any info you needs (limited to 5) in **More Info** pop up. These info would be printed out in your quotation and invoice later.*



**Print Sales Quotation:**

**Test COMPANY 1 (asf)**

A-1-19, SME Technopreneur Centre 1 2270 Jalan Usahawan 2 Cyberjaya 63000 Selangor Malaysia

Phone No. 603 8322 6377, 603 8322 6377, 603 8322 6377

(GST ID No. : 11111)

**Sales Quotation**

**Haslinda**

176, Jalan Kewangan, Taman Kiambang

Kulai 81000 Johor

Malaysia

Phone No.

**No.: SQ0068**

Payment Terms : Net 30 days

Date : 18/Nov/2024

Due Date : 18/Dec/2024

Page : 1 of 1

**Item Name :** Air Jordan 10 1 Retro High OG USA8

**Delivery Date :** 28th January 2025

**Item Quantity :** 10

Item.	Description	Qty	UOM	Unit Price MYR	Disc. MYR	Tax Rate	Amount MYR	
1	Air Jordan 1 Retro High OG USA8	10.000000	unit	550.000000	0.00	6.00	5,500.00	SR_S



## Step 3: Create Progress Invoice

Dashboard New<sup>(Shortcut)</sup> Company **Customer** Supplier Banking Stock General Ledger Tax

**Sales Invoice** GST Mode

Enter Invoice By: Stock Item

Customer\*: H0001 Haslinda

Transfer Document From: Sales Quotation **Transfer**

Address: 176, Jalan Kewangan, Taman Kiangbang

City: Kulai

State: Johor

Post Code: 81000

Country: Malaysia

Contact:

R.O No.

Currency\*: MYR 1 **Get rate**

Date\*: 18/Nov/2024

Payment Terms: Net 30 days

Location: Beko

Delivery Method:

Delivery Terms:

Invoice No.\*: Auto-generated

Tags:

Salesperson:

Remark:

☐ Apply Margin Scheme

☒ **Apply Progress Invoicing**

☐ Apply Flat Rate Scheme

Export Declaration: **Declare**

**More Info**

Enter Barcode

Item Code\*

**Add line**

**Transfer from Sales Quotation**

Tick the box to transfer document to the Sales Invoice.

<input checked="" type="checkbox"/>	Date	Document No.	Payment Term	Currency	Amount
<input checked="" type="checkbox"/>	18/Nov/2024	SQ0068	Net 30 days	MYR	5,830.00

**OK** **Cancel**

Total: 0.00

RM: 0.00

[Journal Entry](#)

**Actions** **Print / Email** **Show Related Doc** **Copy to New** **New** **Save** **Go to list**

- 1 Go to **Sales Invoice** (under **Customer** module).
- 2 Transfer document from **Sales Quotation**.
- 3 Select desired sales quotation.
- 4 Click **OK**.
- 5 Tick on **Apply Progress Invoicing**.

Enter Invoice By: Stock Item

Customer\*: H0001 Haslinda
Transfer Document From: Sales Quotation Transfer

Address: 176, Jalan Kewangan, Taman Kiambang

City: Kulai
State: Johor
Post Code: 81000
Country: Malaysia
Contact:

Date\*: 18/Nov/2024
Invoice No.\*: Auto-generated

Payment Terms: Net 30 days
Tags:

Location: Beko
Salesperson:

Delivery Method: 
Remark:

Delivery Terms:

☐ Apply Margin Scheme
☒ Apply Progress Invoicing
☐ Apply Flat Rate Scheme

Export Declaration: Declare

R.O No.:

Currency\*: MYR 1 Get rate

Enter Barcode: 
Click on the button next to the price to view Item Info.
☐ Discount by %
Amount is: Tax Exclusive

	Item Code*	Description	Image	Ref Doc No	Quantity	UOM	Unit Price	Discount	Tax Code	%	Tag	Amount (RM)*
1	555088018	Air Jordan 1 Retro High OG USA8		SQ0068	10.000000	unit	550.000000	\$	SR_5	6.00		5,500.00

Add line

Progress Invoicing

Ref Doc No: SQ0068
Description: Air Jordan 1 Retro High OG USA8
Ref Amount (RM) (100%): 5500.00
Prior Billed %: 0.00
Prior Billed Amount: 0.00
Current %\*: 50
Total %: 50

Subtotal: 5,500.00
R\_S (6%): 330.00
Total RM: 5,830.00

Journal Entry

Save Go to list

- 6 Now, all items from selected sales quotation have been transferred. To determine the % to be billed, click on %.
- 7 Observe all the information such Ref Amount, Prior Billed %, Prior Billed Amount, and then fill in the % to be billed at **Current %** field. (Ref Amount = 100% quoted amount, Prior Billed % = % been billed before, Total % = Prior Billed % + Current %)
- 8 Click **OK**. (repeat step 6 to step 8 if you have additional item)
- 9 Lastly, **Save**.



**Note:**

Once the **Current %** been filled up, the **Quantity** and **Amount** in main screen would be re-populated based on the % been inserted.

If you have any extra item, service or overhead to be charged to your client, just **Add Line** will do. However, these item line is not applicable for progress invoicing, instead, full amount would be billed.

**Print Sales Invoice:**

**Test COMPANY 1 (asf)**

A-1-19, SME Technopreneur Centre 1 2270 Jalan Usahawan 2 Cyberjaya 63000 Selangor Malaysia  
Phone No. : 603 8322 6377, 603 8322 6377, 603 8322 6377 leongkl@ams.com.my  
(GST ID No. : 111111)

**Tax Invoice**

**No.: ZTI-2024-00005**

**Haslinda**

176, Jalan Kewangan, Taman Kiambang  
Kulai 81000 Johor  
Malaysia

Payment Terms : Net 30 days  
Date : 18/Nov/2024  
Due Date : 18/Dec/2024  
Page : 1 of 1

**Item Name :** Air Jordan 10 1 Retro High OG USA8

**Delivery Date :** 28th January 2025

**Item Quantity :** 10

Item.	Description	Ref. Amount MYR	Prior %	Curr %	Tax Rate	Amount MYR	
1	Air Jordan 1 Retro High OG USA8	5,500.00	0.00	50.00	6%	2,750.00	SR_5

**Ringgit Malaysia :** Two Thousand Nine  
Hundred Fifteen Only

Sub Total	2,750.00
GST 6%	165.00
Grand Total MYR	2,915.00

Tax Code	Amount	Tax
SR @ 6%	2,750.00	165.00

## Step 4: Change Quoted Amount due to Original Work Scope Changed

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*If the change of scope incurred change of quoted amount, you may perform the following based on the situation.*

### **4.1 If No Invoice been Issued Yet**

1. Locate the original sales quotation and amend it directly.

### **4.2 If Invoice been Issued, New Amount Higher than Quoted Amount**

1. Create a new sales quotation for the additional amount to be charged.
2. Issue a new invoice based on the updated sales quotation for the additional amount.

### **4.3 If Invoice been Issued, New Amount Lower than Quoted Amount**

1. If the original quoted amount has been fully invoiced, issue a credit note or process a sales return.
2. If the original quoted amount has been partially invoiced, treat the reduction as a "discount" on the next invoice.



## Step 5: Revise Work Progress (%) Which Has Been Invoiced

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*There might be a situation where you have billed your customer for a certain % work done. However, customer not agree with it and request to revise the % work done together with billed amount.*

*So, you may perform the following based on the situation.*

### **5.1 If Customer Not Request for Credit Note and Agree to Revise the Issued Invoice**

1. Simply update the percentage of work completed on the issued invoice and reprint it.

### **5.2 If Customer Request for Credit Note**

1. Begin by issuing a credit note or processing a sales return to offset the billed amount disputed by the customer.
2. Afterward, retrieve the original sales quotation.

**Sales Quotation** GST Mode

Customer\* S0001 Sky9 Group Sdn Bhd

Address ☐ Billing Address ☐ Delivery Address Date\* 16/11/2015 Quotation No.\* SQ0004

No. 31, Jalan Raja 1/9, Taman Century, Ayer Keroh 99888 Melaka Malaysia Payment Terms Net 30 days Tags

Contact Location Hq Salesperson

Currency\*

Enter Barcode

Item Code\*

DS

Construction

Add line

Delete

**Prior Billed** 4

Prior Billed %: 50.00 Prior Billed Amount: 5,000.00

Revise Prior Billed % to:  Remark:

**Reminder:**

- By revise prior billed %, the new % would be reflected in your next progress invoice.
- Existing progress invoice and accountbook won't be affected by this revise. If would like to contra off invoiced amount from accountbook, please raise credit note or sales return.

**Revised History:**

Date	From Prior Billed %	To Prior Billed %	Remark

5 **Ok**

Ex Exclusive

Unit (RM)*	%
10,000.00	% <span style="float: right;">3</span>
500,000.00	%

510,000.00  
270,600.00  
780,600.00

**Go to list**

3 Click on the “%” for the item you would like to amend.

4 Fill in **Revise Prior Billed % To** and **Remark**.

5 Click **OK** and **Save** the sales quotation.

After saved, your next invoice will be calculated based on revised %.