TreezSoft

Getting Started Manual
For Progress Invoicing

Last Update: Nov 2015

Managed by **Agile Matrix Solutions Sdn Bhd**

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For information about customer support, please visit our homepage at
http://www.treezsoft.com on the World Wide Web.

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Step 1: How to Activate Progress Invoicing?

Note: Progress invoicing, also called progress billing or partial billing, is invoicing from a quotation in stages instead of for the full amount. However, you can invoice for the full amount when using progress invoicing.

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

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

1. Go to **Sales Quotation** (under **Customer** module).
2. Fill in all product/service.

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:

3A Architect Sdn Bhd (A-96878-98695)
3A Building, Jalan Tun Ismail, Cyberjaya 99999 Selangor Malaysia
Phone No. 07-3698569
(GST ID No. : 0009876500987)

Sales Quotation

No. : SQ0004

Sky9 Group Sdn Bhd
No. 31, Jalan Raja 1/9,
Taman Century,
Ayer Keroh 99888 Melaka
Malaysia
Phone No.

Payment Terms	: Net 30 days
Date	: 16/11/2015
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Project Title : Build a 3 star hotel with 12 level, which consist of 288 of rooms and 3 level of car park.

Project Date : 01 Jan 2015

Project Duration : 2 years

Project Ref : KJHYU-009-0988

Item.	Description	Qty	UOM	Unit Price MYR	Disc.	Tax Rate	Amount MYR	
1	Design & Submission	1.00	unit	10,000.00	0.00	6.00	10,000.00	SR_S
2	Construction	1.00	unit	4,500,000.00	0.00	6.00	4,500,000.00	SR_S

Ringgit Malaysia: Four Million Seven Hundred Eighty Thousand Six Hundred Only

Sub Total	4,510,000.00
GST 6.00%	270,600.00
Grand Total	4,780,600.00

Note :

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Authorised Signature

Step 3: Create Progress Invoice

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.**

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 for the rest of 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:

3A Architect Sdn Bhd (A-96878-98695)
3A Building, Jalan Tun Ismail, Cyberjaya 99999 Selangor Malaysia
Phone No. 07-3698569
(GST ID No. : 0009876500987)

Tax Invoice

No. : TI-00004

Sky9 Group Sdn Bhd
No. 31, Jalan Raja 1/9,
Taman Century,
Ayer Keroh 99888 Melaka
Malaysia
Phone No.

Payment Terms	: Net 30 days
Date	: 16/11/2015
Due Date	: 16/12/2015
Page	: 1 of 1

Project Title : Build a 3 star hotel with 12 level, which consist of 288 of rooms and 3 level of car park.

Project Ref : KJHYU-009-0988

Project Date : 01 Jan 2015

Project Duration : 2 years

Item.	Description	Ref. Amount MYR	Prior %	Curr %	Tax Rate	Amount MYR	
1	Design & Submission	10,000.00	0.00	50.00	6.00	5,000.00	SR_S
2	Construction	4,500,000.00	0.00	10.00	6.00	450,000.00	SR_S

Ringgit Malaysia : Four Hundred Eighty Two Thousand Three Hundred Only

Sub Total	455,000.00
GST 6.00%	27,300.00
Grand Total MYR	482,300.00

Note :

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Authorised Signature