

Invoicing

1. Introduction

This guide provides a step-by-step instructions of managing invoicing processes efficiently and accurately. It outlines the essential steps for generating and managing invoices to ensure smooth financial operations. Follow the instructions in this guide to streamline your invoicing records, and maintain clear and organized billing information.

2. Invoicing

This section an overview of the tools and features available for generating invoices correctly. From entering accurate client and payment details to formatting invoices professionally and setting appropriate payment terms, each step is designed to help you create clear, error-free invoices that facilitate timely payments and effective financial management.

2.1 New Consumption Tax Types

Go to **Settings > Consumption Tax Types > New Consumption Tax Type > Fill in details > Add**

Details include:

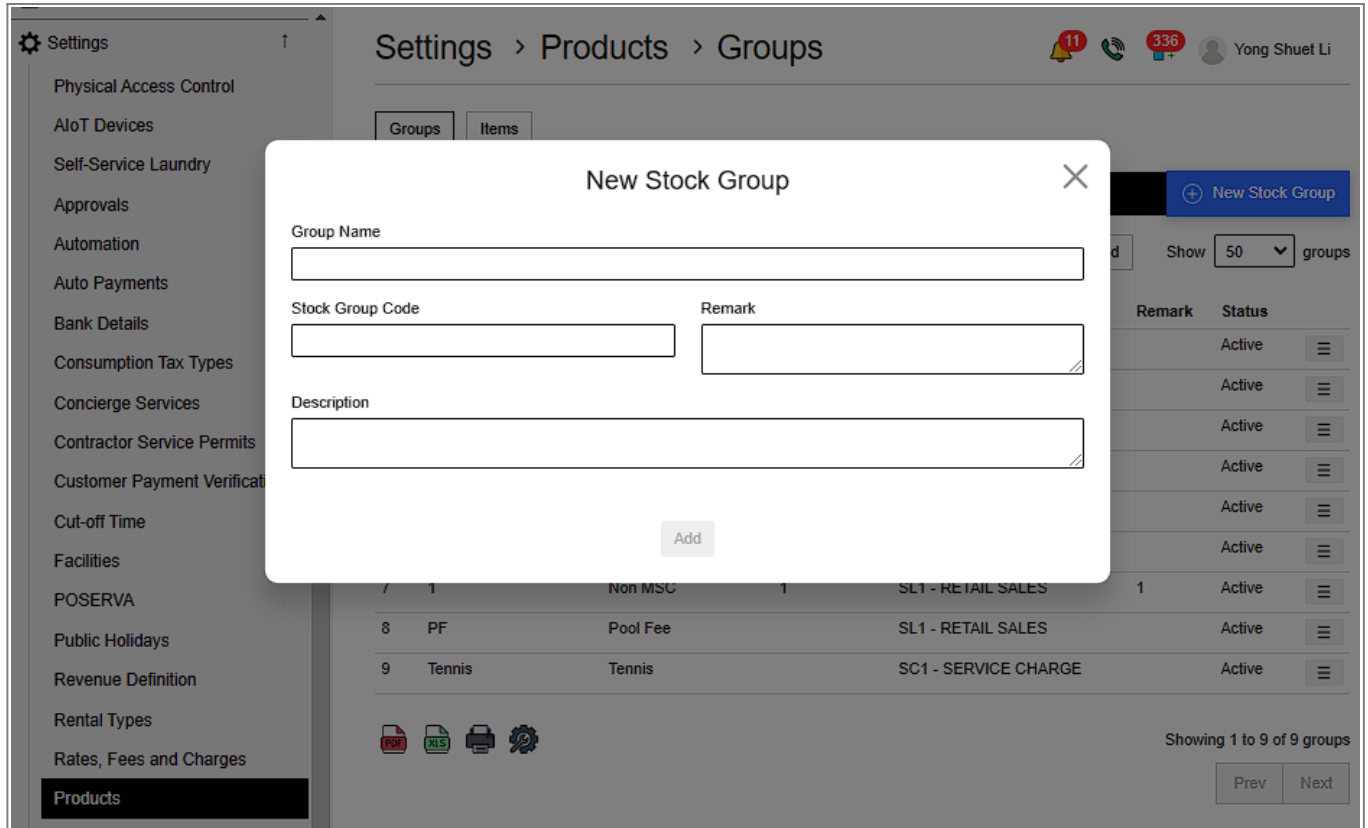
1. Code
2. Description
3. Default Consumption Tax Rate (%)

2.2. Add New Stock Group

Go to **Settings > Product > Groups > New Stock Group > Fill in details > Add**

Details include:

1. Name
2. Stock Group Code
3. Remark Description



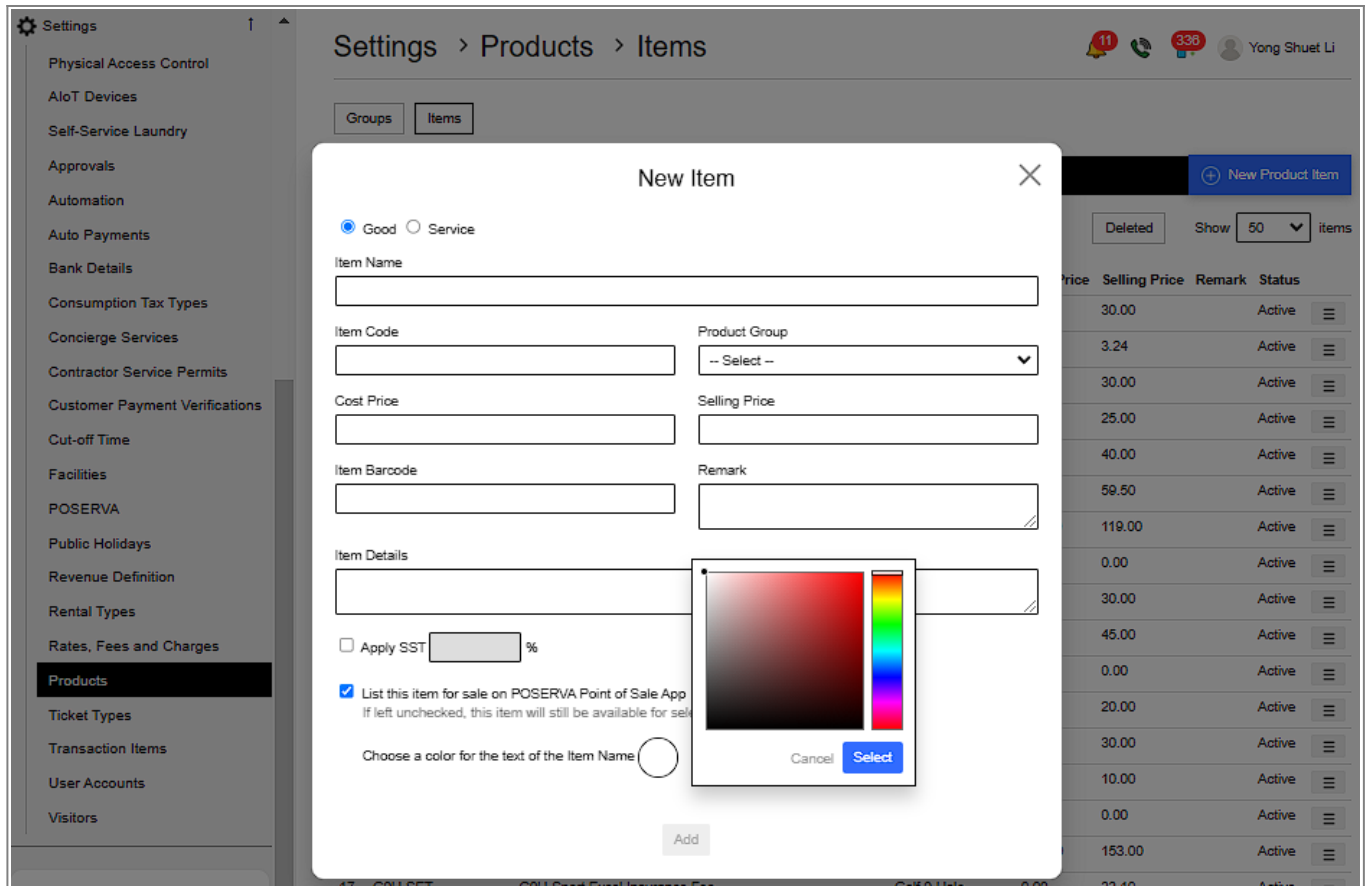
2.3. Add New Item

Go to **Settings > Product > Item > New Product Item > Fill in details > Add**

- **Goods:** Physical items that can be owned and used.
- **Services:** Actions or activities performed to fulfil needs or desires.

Details include:

1. Choose either item is Good or Service
2. Item Name ,Code & Cost Price
3. Product Group
4. Selling Price
5. Item Barcode
6. Remark
7. Item Details
8. Apply Tax amount created in Consumption Tax Types
9. Whether to List this item for sale on POSERVA Point of Sale App (If left unchecked , this item will still be available for selection when creating a new invoice)
10. Choose a color for the text of the Item Name



2.4 New Invoice

Go to **Invoicing > New Invoice > Fill in details > Generate**

Details include:

1.Customer Information

- Name
- MyKad
- Tax Identification Number
- Phone no
- Email
- Address

2.Invoice Line Item(s)

Type Name of product added

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