

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

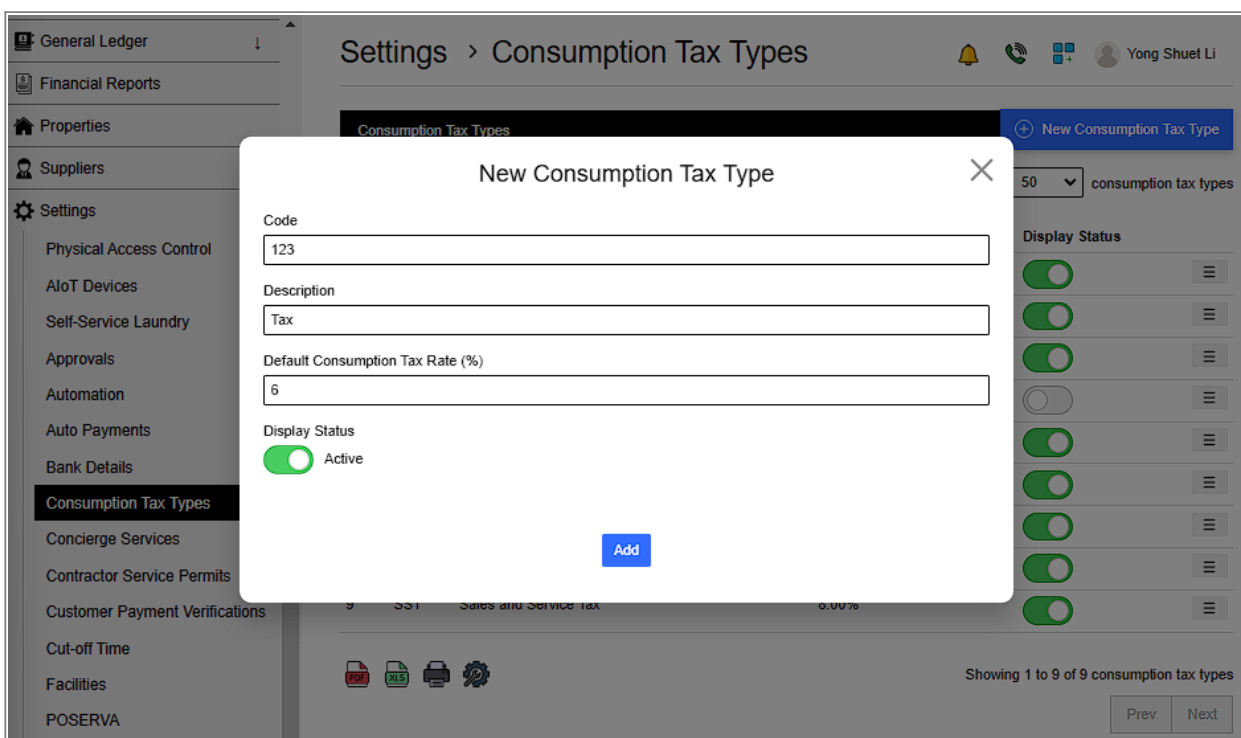
This section an overview of the tools and features available for generating invoices correctly. From entering accurate client and payment details to formatting invoices professionally and setting appropriate payment terms, each step is designed to help you create clear, error-free invoices that facilitate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

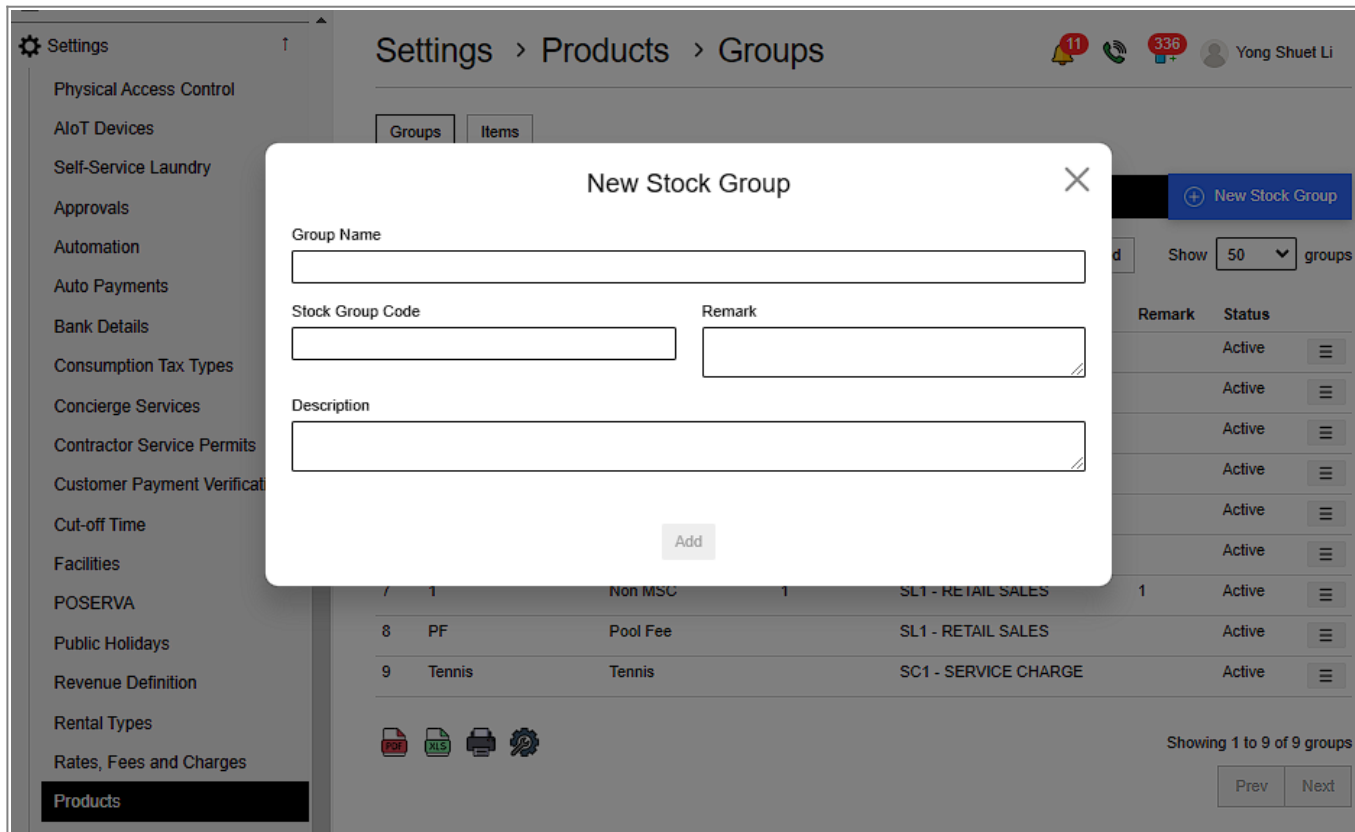


2.2. Add New Stock Group

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

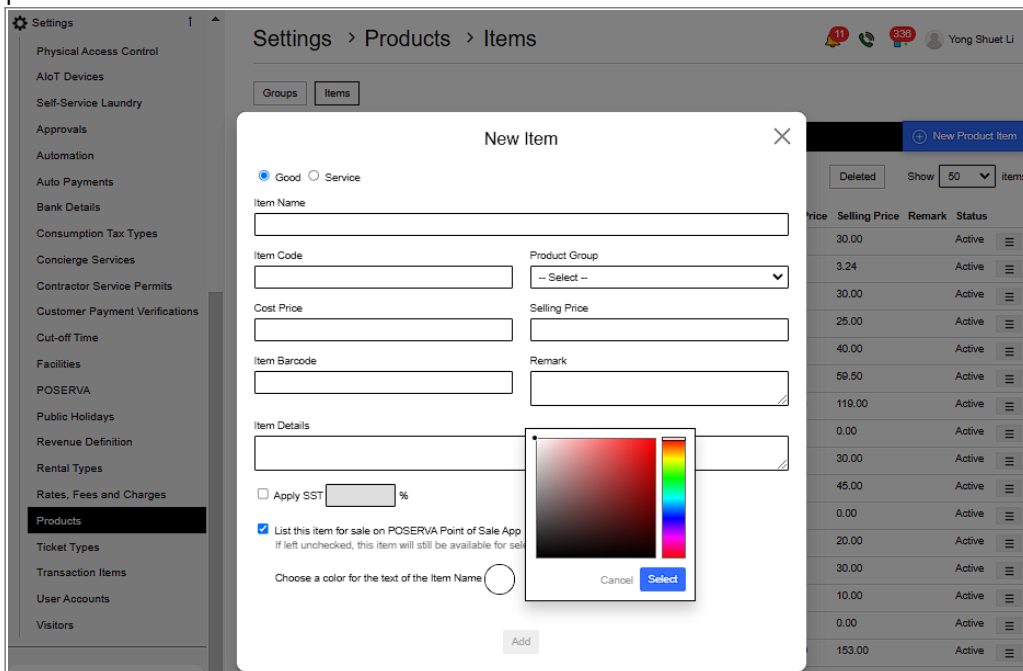
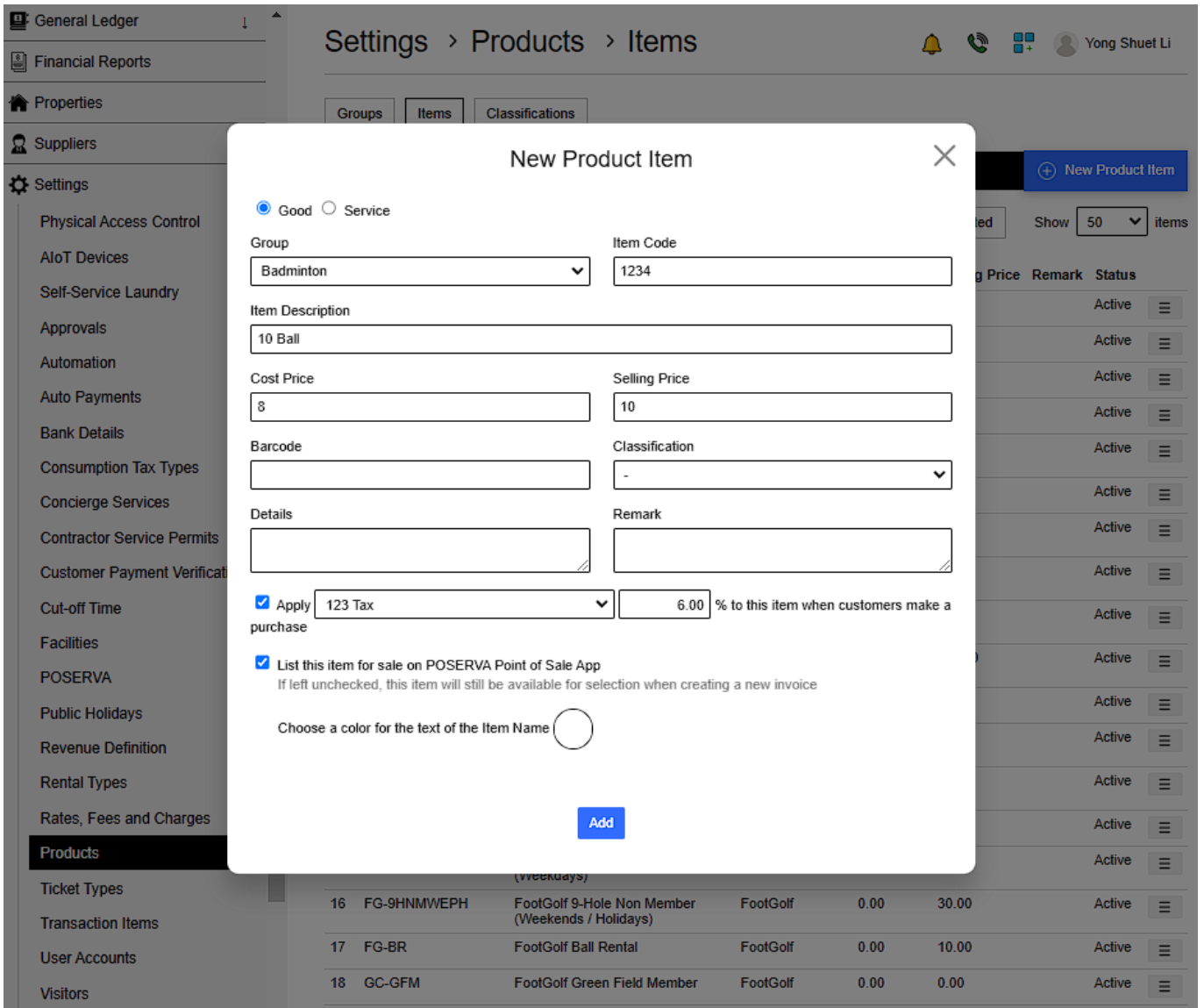
Go to **Settings > Product > Item > New Product Item > Fill in details > Add**

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

Details include:

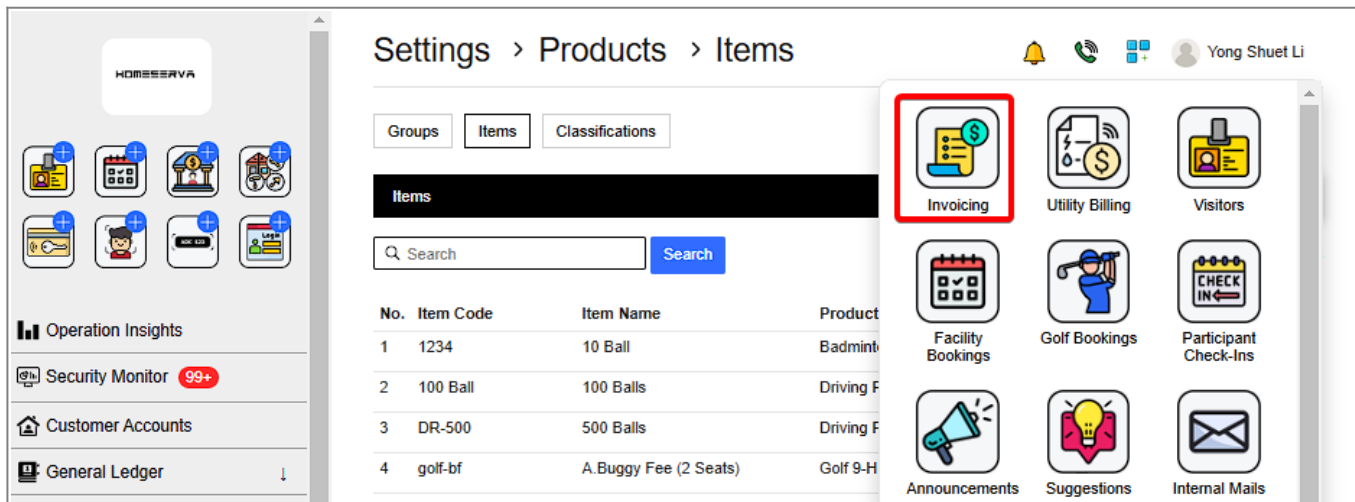
1. Choose either item is Good or Service
2. Item Name ,Code & Cost Price
3. Product Group
4. Selling Price
5. Item Barcode
6. Remark
7. Item Details
8. Apply Tax amount created in Consumption Tax Types
9. Whether to List this item for sale on POSERVA Point of Sale App (If left unchecked , this item will 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

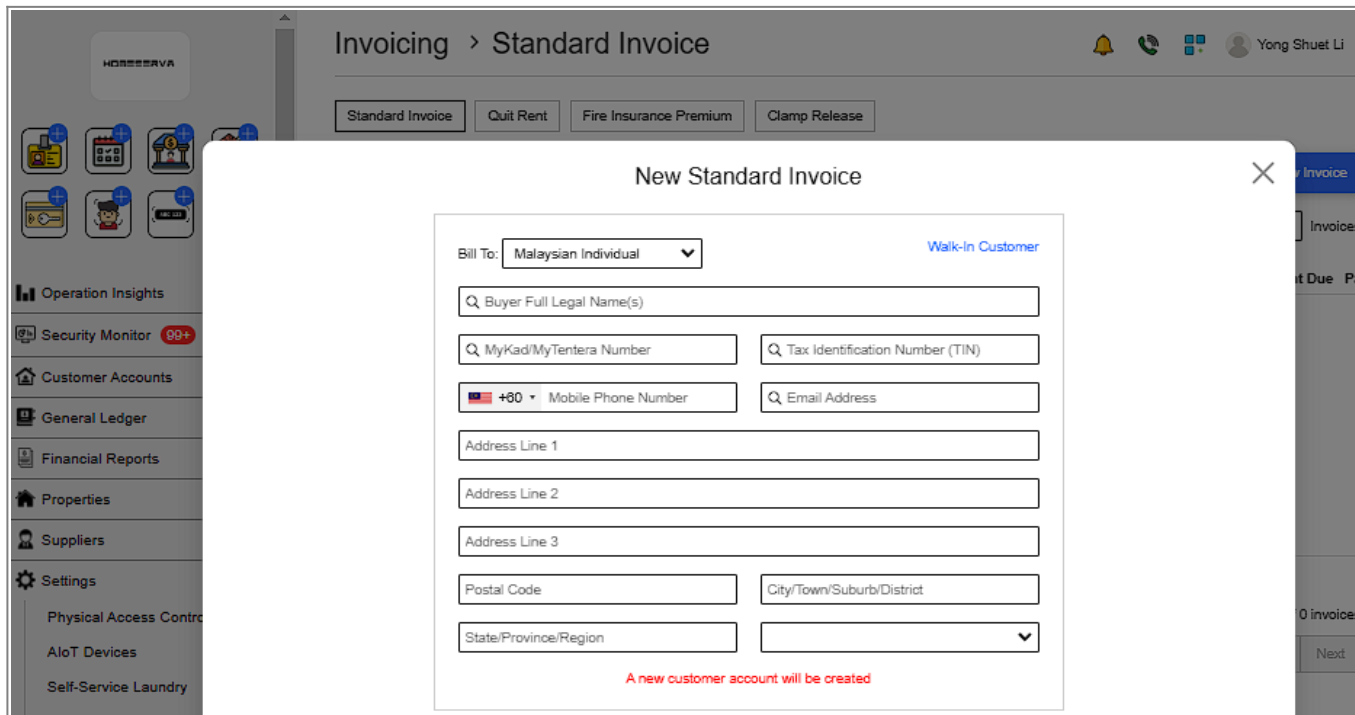
Go to **Invoicing > New Invoice > Fill in details > Generate**



Details include:

1. Customer Information

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



2. Invoice Line Item(s)

Type Name of product added

The screenshot displays a software interface for creating an invoice. On the left is a sidebar menu with categories like Properties, Suppliers, and Settings. The main area is titled 'Sales Order No.' with a 'Select Sales Order' button. Below this is the 'Invoice Line Item(s):' section, which contains a table with one item: 'Q 10 Ball' with a quantity of 1 and a unit price of 10.00. To the right of this table are buttons for minus, plus, and a 'Full View >' link. Below the line items is a 'Tax Summary:' table with columns for 'No.', 'Taxable Amount', 'Tax Type', 'Tax Rate (%)', and 'Tax Amount'. It shows a single tax entry for '123 Tax' at a 6% rate, resulting in a tax amount of 0.60. To the right of the tax summary is a 'Total:' section with a list of financial totals, each with a corresponding input field: Sum of Subtotals (10.00), Total Discount Value (0.00), Total Net Amount (10.00), Total Excluding Tax (10.00), Total Tax Amount (0.60), Total Including Tax (10.60), Rounding Adjustment (0.00), Total Payable Amount (10.60), Prepayment Amount (Select Invoice(s)), and Advance Payment. At the bottom of the 'Total' section, it shows 'Balance Available: 0.00' and 'Total Net Payable Amount (10.60)'. At the very bottom of the interface are three buttons: 'Save', 'Preview', and 'Generate'.

No.	Description	Quantity	Unit Price	Unit Discount	Total Excluding Tax	
1	Q 10 Ball	1	10.00	RM 0	10.00	
					Sum	10.00

No.	Taxable Amount	Tax Type	Tax Rate (%)	Tax Amount	
1	10.00	123 Tax	6	0.60	
				Total Tax Amount	0.60

Total:	Value	Sign
Sum of Subtotals	10.00	
Total Discount Value	0.00	(-)
Total Net Amount	10.00	
Total Excluding Tax	10.00	
Total Tax Amount	0.60	(+)
Total Including Tax	10.60	
Rounding Adjustment	0.00	(-)
Total Payable Amount	10.60	
Prepayment Amount	Select Invoice(s)	(-)
Advance Payment		(-)
Balance Available: 0.00		
Total Net Payable Amount	10.60	

After the invoice is generated, scroll to the bottom of the invoice and click on the **'Pay'** button to proceed with the payment.

INVOICE IV00003406 (due by today)

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UNIT B1-02, BASEMENT VERTICAL PODIUM, AVENUE 3, BANGSAR SOUTH CITY, and NO. 8 JALAN KERINCHI, 31650, Perak, Perak, Malaysia
Contact No. 03-2242 4598 **Fax No.** 03-2242 4597 **Email Address** admin1.vertical@dats.com.my
TIN 34123123234888 **SST No.** W10-1902-32000257

STANDARD INVOICE

Bill To:

All
Malaysia
Mobile No. +60123

Project Name : VYROX (PLZ)

Invoice Issuance Date : 26-Feb-2025
Invoice Due Date : 26-Feb-2025
Invoice Number : IV00003406
Customer Account ID : PLZ-363

No.	Item	Quantity	Unit Price (RM)	Subtotal (RM)
1	10 Ball	1	10.00	10.00
Sum of Subtotals :				10.00
Total Discount Value :				0.00
Total Net Amount :				10.00
Total Excluding Tax :				10.00
Total Tax Amount :				0.60
Total Including Tax :				10.60
Rounding Adjustment :				0.00
Total Payable Amount :				10.60
Prepayment Amount :				0.00
Advance Payment :				0.00
Total Net Payable Amount :				10.60

Payment Instructions

Please ensure that payment is completed within 30 days from the invoice issuance date through any of the payment channels below to avoid incurring a 10% annual interest charge on any overdue amount.



Payment Channels

- Online Payment - Scan the QR code on the right with an e-wallet or mobile banking app. Alternatively, you may access the URL link below the QR code using an internet browser or click the "Pay" button at the bottom of the invoice page for alternative online payment methods.
- Manual Bank Transfer - Bank Name: **RHB**
Bank Account Holder Name: **JMB Horizon Sdn Bhd**
Bank Account Number: **4512321401021054**
Reference: IV00003406

Bank Name: **MAYBANK**
Bank Account Holder Name: **The Horizon JMB Sdn Bhd**
Bank Account Number: **108004015623**
Reference: IV00003406
- Cheque Payment - Payee: **Perak Corporation** (Cross as "A/C PAYEE ONLY")
Amount: TEN AND CENTS SIXTY ONLY (RM 10.60)

Note: After completing the manual bank transfer or cheque payment, please email the payment slip to admin1.vertical@dats.com.my for verification purposes. This invoice is final. Your payments are non-refundable.

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Associated Transactions as of 26-Feb-2025 11:13 AM

No.	Transacted	Transaction Code	Document No.	Transaction Name	In	Out	Outstanding
1	26-Feb-2025	SL1	IV00003406	RETAIL SALES		10.60	10.60

Current Outstanding: RM 10.60 [Pay](#)

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Last update: **2025/02/26 03:18**

