

# Getting Started Manual For Progress Invoicing

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## 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 contact our support to subscribe Progress Invoicing before perform this step, otherwise you might unable to activate it.

The screenshot shows the 'Preferences' window in the Express 365 system. A red circle with the number '1' is placed over the 'Preferences' title. The window is divided into several sections: 'Account Defaults', 'Stock Defaults', and 'Financial Settings'. In the 'Financial Settings' section, the 'Enable Progress Invoicing' checkbox is checked and circled in red. A red circle with the number '2' is placed over this checkbox. Other settings visible include 'Base Currency' (MYR), 'Date Format' (02/12/2019), 'Financial Year End' (December), and 'Lock Date' (25/08/2019).

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

**Note:** Please contact support if you are unable to save.

## 2. Create Sales Quotation

### Sales Quotation

1

Customer\* C0015 CBC Sdn Bhd

Address Taman Teknologi Puchong  
Puchong 47000 Selangor  
Malaysia

Date\* 04/10/2019

Payment Terms Net 30 days

Location Hq

Quotation No.\* SQ0003

Tags

Salesperson

Remark

Contact Jessie +6012785153

Currency\* MYR 1

Get rate

More Info

Enter Barcode

Click on the button next to the price to view Item Info.

Discount by %

Amount is: Tax Exclusive

Item Code*	Description	Quantity	UOM	Unit Price	Discount	Tax Code	%	Amount (RM)*	
D0001	Design & Submission	1.000	unit	5,000.000	\$	SV_6	6.00	5,000.00	N/A X
S00015	Submission & Approval	1.000	unit	3,000.000	\$	SV_6	6.00	3,000.00	N/A X
T0001	Tender	1.000	unit	500.000	\$	SV_6	6.00	500.00	N/A X
C00045	Construction	1.000	unit	500,000.0...	\$	SV_6	6.00	500,000.00	N/A X

Add line

Subtotal 508,500.00

SV\_6 (6%) 30,510.00

Grand Total RM 539,010.00

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

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

2 Fill in all product/service.

**Sales Quotation**

Customer\* C0015 CBC Sdn Bhd

Address Taman Teknologi Puchong Puchong 47000 Selangor Date\* 04/10/2019 Quotation No.\* SQ0003

**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
Project Title	Room Renovation
Loan Amount	RM 10000
Ref	HG02115615616

**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.

**More Info**

Amount is: Tax Exclusive

%	Amount (RM)*
6.00	5,000.00 %
6.00	3,000.00 %
6.00	500.00 %
6.00	500,000.00 %

**Subtotal** 508,500.00  
**SV\_6 (6%)** 30,510.00  
**Grand Total RM** 539,010.00

**Ok** **Save** **Go to list**

- 3 Click **More Info** to bring out a pop up.
- 4 Add additional info such as project title by click on **Add Line**.
- 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.



## 2.1. Print Sales Quotation:



### Support Company (B-569874)

No. 1, Jalan Support, Taman Support Support City 11111 Support  
State Malaysia  
Phone No. 11111  
(Sales Tax Reg. No : SLT-111) | (Service Tax Reg. No :  
SVT-312)

### Sales Quotation

No. : SQ0003

#### CBC Sdn Bhd

Taman Teknologi Puchong  
Puchong 47000 Selangor  
Malaysia  
Jasiah Phone No. +60127851538

Payment Terms : Net 30 days

Date : 04/10/2019

Page : 1 of 2

Project Title : Room Renovation

Ref : HG02115615616

Loan Amount : RM 10000

Item.	Description	Qty	UOM	Unit Price MYR	Disc. MYR	Tax Code	Amount MYR
1	Design & Submission	1.000	unit	5,000.000	0.00	SV_8	5,000.00
2	Submission & Approval	1.000	unit	3,000.000	0.00	SV_8	3,000.00
3	Tender	1.000	unit	500.000	0.00	SV_8	500.00
4	Construction	1.000	unit	500,000.000	0.00	SV_8	500,000.00

Ringgit Malaysia: Five Hundred Thirty Nine Thousand Ten Only

Note:

Sub Total	508,500.00
Service Tax	30,510.00
Grand Total	539,010.00

Tax Code	Amount	Tax
SV @ 6%	508,500.00	30,510.00

\_\_\_\_\_  
Authorised Signature

## 3. Create Progress Invoice

**Sales Invoice** 1

Enter Invoice By: Stock Item 2

Customer\*: C0015 3 CBC Sdn Bhd

Transfer Document From: Sales Quotation 4 **Transfer**

Address: Taman Teknologi Puchong, Puchong 47000 Selangor, Malaysia

Date\*: 02/12/2019 5

Payment Terms: Net 30 days

Location: B1

Delivery Method:

Delivery Terms:

Invoice No.\*: Auto-generated

Tags: Malaysia

Salesperson: Jude

Remark:

Contact: Jessie 6 +6012785153

P.O No.:

Currency\*: MYR 7 1

**Processing your request. Please wait...**

☒ Apply Progress Invoicing 8

☐ Apply Flat Rate Scheme

**Transfer From Sales Quotation**

Tick the box to transfer document to the Sales Invoice.

<input type="checkbox"/>	Date	Document No	Payment Term	Currency	Amount
<input type="checkbox"/>	04/10/2019	SQ0003	Net 30 days	MYR	539,010.00
<input type="checkbox"/>	02/12/2019	SQ0005	Net 30 days	MYR	508,500.00

**OK** **Cancel**

**Journal Entry**

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

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



## Sales Invoice (Printed)

Enter Invoice By
Stock Item
Ship To

Customer\*
C0015
CBC Sdn Bhd
Transfer Document From
Transfer

Address
Taman Teknologi Puchong  
Puchong 47000 Selangor  
Malaysia
Date\*
31/10/2019
Invoice No.\*
IV0022

Contact
Jessie
+60127851531
Payment Terms
Net 30 days
Tags

P.O No.
Location
Hq
Salesperson
Kris

Currency\*
MYR
1
Get rate
Delivery Method
Remark

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

Enter Barcode
Click on 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)*
D0001	Design & Submission		SQ0003	0.200	unit	5,000.000	\$	SV_6	6.00		1,000.00
S00015	Submission & Approval		SQ0003	0.150	unit	3,000.000	\$	SV_6	6.00		450.00
T0001											50.00
C00045											125,000.00
<b>Subtotal</b> 126,500.00											
<b>SV_6 (6%)</b> 7,590.00											
<b>Grand Total RM</b> 134,090.00											

Add line

Progress Invoicing

Ref Doc No: SQ0003  
Description: Design & Submission  
Ref Amount (RM) (100%): 5000.00  
Prior Billed %: 0.00 Prior Billed Amount: 0.00  
Current % \*: 20  
Total %: 20

Ok

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 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 lines are not applicable for progress invoicing, instead, full amount would be billed.



### 3.1. Print Sales Invoice:



#### Support Company (B-569874)

No. 1, Jalan Support, Taman Support Support City 11111 Support State Malaysia  
Phone No. : 11111 support@support.com  
(Sales Tax Reg. No : SLT-111) | (Service Tax Reg. No : SVT-312)

#### Invoice

No. : IV0022

#### CBC Sdn Bhd

Taman Teknologi Puchong  
Puchong 47000 Selangor  
Malaysia  
Jessie Phone No. : +60127851538

Payment Terms : Net 30 days  
Date : 31/10/2019  
Due Date : 30/11/2019  
Page : 1 of 2

Project Title : Room Renovation

Ref : HG02115615616

Loan Amount : RM 10000

No.	Description	Ref. Amount MYR	Prior %	Curr %	Tax Code	Amount MYR
1	Design & Submission	5,000.00	0.00	20.00	SV_6	1,000.00
2	Submission & Approval	3,000.00	0.00	15.00	SV_6	450.00
3	Tender	500.00	0.00	10.00	SV_6	50.00
4	Construction	500,000.00	0.00	25.00	SV_6	125,000.00

Ringgit Malaysia : One  
Hundred Thirty Four Thousand  
Ninety Only

Sub Total	126,500.00
Service Tax	7,590.00
Grand Total MYR	134,090.00

Tax Code	Amount	Tax
SV @ 6%	126,500.00	7,590.00

Note :

\_\_\_\_\_  
Authorised Signature

#### **4. Change Quoted Amount due to Original Work Scope Changed**

*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**

- a. Just need to find back the sales quotation and amend it.

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

- a. Raise a new sales quotation for the additional amount to be charged.
- b. Then, issue new invoice based on this new sales quotation for the additional amount.

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

- a. If original quoted amount is fully invoiced, raise credit note or sales return.
- b. If original quoted amount is partly invoiced, may treat the reduction amount as “discount” in next invoice.

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

There might be a situation where you have billed your customer for a certain % work done. However, customer not agrees 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

- a. Just amend the % on the issued invoice and reprint.

### 5.2. If Customer Request for Credit Note

- 1 First, raise a credit note or sales return to contra-off the billed amount which disagreed by customer.
- 2 Then, find back the sales quotation.

**Sales Quotation**

Customer\*

Address

Contact

Currency\*

Enter Barcode

Item Code\*

D0001

S00015

T0001

C00045

Add line

**Prior Billed**

Prior Billed %: 20.00      Prior Billed Amount: 1,000.00

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

Ok

Max Exclusive

5,000.00 %

3,000.00 %

500.00 %

500,000.00 %

508,500.00

30,510.00

539,010.00

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