



BiFlow Training Series

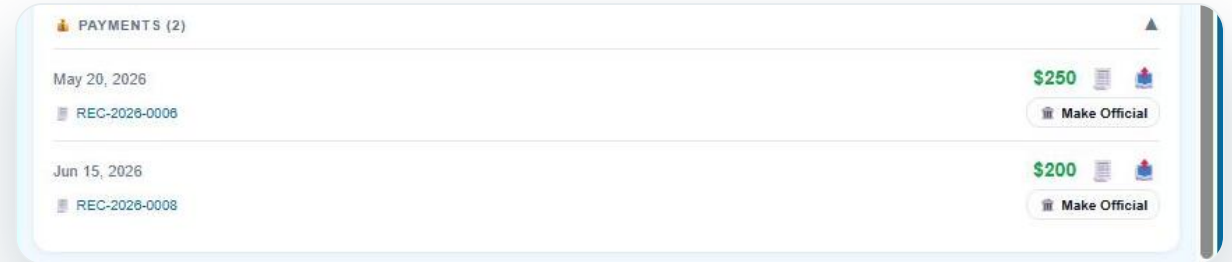
PART 4

Payments & Invoicing

Recording Payments · Official Documents · Editing · Registers

1 Recording a Payment

- 1 Go to Pay, and tap "Record a Payment"
- 2 Choose the client — BiFlow shows what they currently owe
- 3 Enter the amount received
- 4 Tap Record — a receipt is created automatically, instantly



Works the same way whether the balance is on a package, a direct booking, or a Case.

2 Every Sale Invoices Itself

No extra step, ever

The moment a package is reserved, a direct visit is booked, or a Case invoice is added, the invoice already exists

Free on every plan

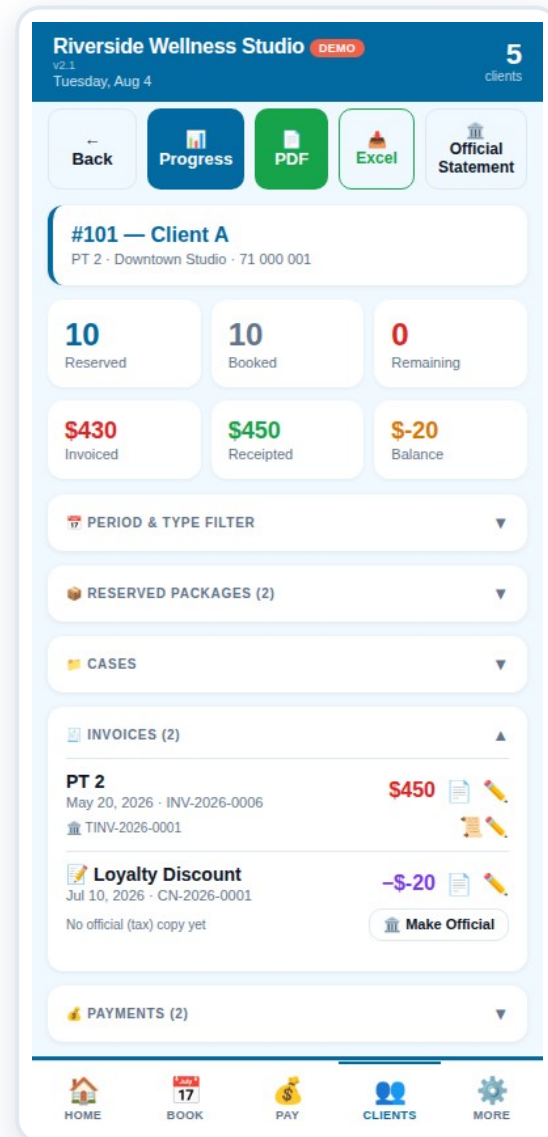
Regular invoicing, receipts, and credit notes are never behind a paid add-on

Amount in words, automatically

Every total is spelled out underneath the numbers — “Four Hundred Thirty Dollars Only”

Edit any invoice, any time

Tap the pencil next to any document to correct a description, amount, date, or note



3 Editing an Invoice

- 1 Tap the pencil icon next to any Invoice or Credit Note
- 2 Change the date, description, sessions, price, or note — whatever needs correcting
- 3 For a package invoice, this also keeps the package's session count in sync automatically
- 4 A checkbox lets you turn the stamp & signature on or off for just this one document

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Back Progress PDF Excel Official Statement

#101 — Client A
PT 2 · Downtown Studio · 71 000 001

10 10 0

Edit Invoice ✕

Sessions and price stay in sync with the package this belongs to.

DATE
05/20/2026

DESCRIPTION
PT 2

SESSIONS PRICE/SESSION (\$)
10 45

Total \$450

COMPANY DETAILS (THIS DOCUMENT ONLY)
Company name, MOF #, address...

NOTE

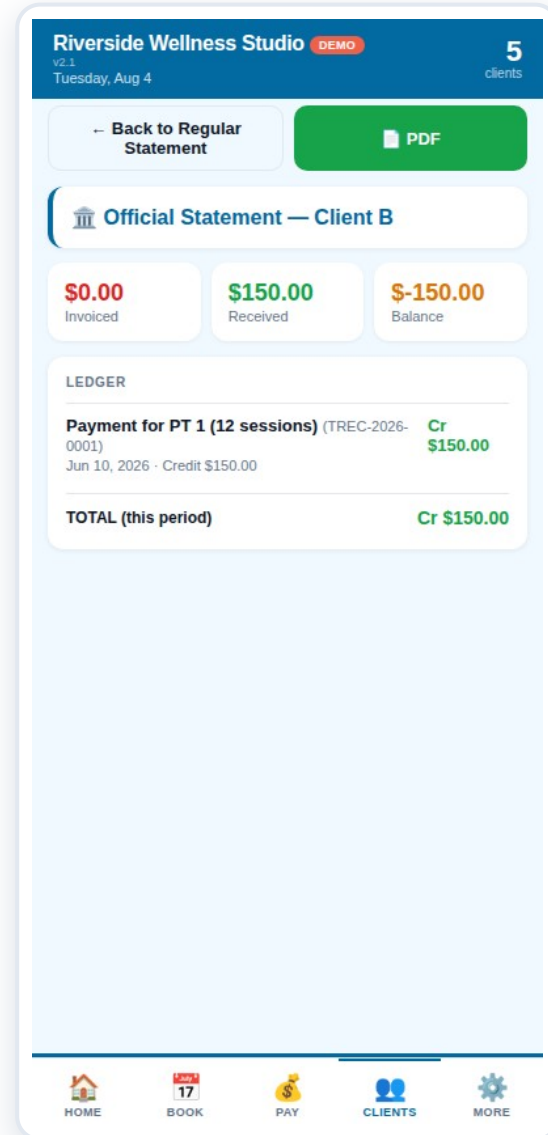
☒ SHOW STAMP & SIGNATURE ON THIS DOCUMENT

✓ Save Changes

4 Official Tax Documents

For businesses that need VAT-compliant, government-ready paperwork — a paid add-on, separate from regular invoicing.

- 1 Tap “Make Official” next to any invoice, receipt, or credit note
- 2 It becomes its own linked document, with a VAT breakdown calculated automatically
- 3 Your VAT number and rate, set once in Invoice Settings, apply to every one
- 4 The Official Client Statement shows only these official documents, ready to hand to a client who needs one



5

The Official Documents Register

1

In More, find the Official Documents Register

2

Pick any date range — This Month, This Year, or a custom range

3

See running totals for tax invoices, receipts, and credit notes, plus your net VAT

4

Print a summary PDF, or every actual document combined into one file, ready for your accountant

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OFFICIAL DOCUMENTS REGISTER

Every Official Invoice, Receipt & Credit Note issued in the period — ready for tax declarations.

FROM

TO

01/01/2000

01/01/2030

This Month

This Year

All Time

SUMMARY

2

Tax Invoices — \$1650.00

1

Credit Notes — \$100.00

1

Receipts — \$150.00

\$170.50

Net VAT for period

Cancelled documents are listed below, but excluded from these totals.

Print Tax Register List PDF

Print Tax Register PDF

Export to Excel

DOCUMENTS (4)

INVOICES (2)

TINV-2026-0001

May 20, 2026 - Client A

\$450

HOME

BOOK

PAY

CLIENTS

MORE

6 The Normal Documents Register

The everyday equivalent of the Official Register — for your regular, non-tax invoicing.

- 1 Same idea as the Official Register, but for your regular invoices, receipts, and credit notes
- 2 Covers all three sales methods together, in one place
- 3 Useful for sending your everyday bookkeeping to an accountant, without collecting documents client by client

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NORMAL DOCUMENTS REGISTER

Every everyday Invoice, Receipt & Credit Note issued in the period — handy for sending everything to your accountant in one go.

FROM

TO

01/01/2000

01/01/2030

This Month

This Year

All Time

SUMMARY

15

Invoices — \$6890.00

2

Credit Notes — \$80.00

19

Receipts — \$5230.00

Cancelled documents are listed below, but excluded from these totals.

Print Normal Register List PDF

Print Normal Register PDF

DOCUMENTS (36)

INVOICES (15)

INV-2026-0001

Jan 15, 2026 · Client B

\$280

INV-2026-0002

\$400

HOME

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MORE

Your finances are fully covered

Payments, invoicing, official documents, and both Registers
— all in your toolkit.

Coming up in Part 5

Client Statements & Progress Tracking — the full statement view, and logging session-by-session progress with automatic charts