



BiFlow Training Series

PART 9

Credit Notes for Everyday Sales

Creating a Discount / Return · Where It Appears · Editing a Credit Note

What we'll cover in this part

1	Creating a Discount / Return	The everyday way to credit a client — from the same screen used to sell a package
2	Reviewing the Total Before You Submit	The invoice amount flips negative automatically, so it's unmistakably a credit
3	Where It Shows Up — the Client Statement	Every credit note, listed separately from invoices, with its own real document number
4	Editing a Credit Note — Date, Description & Amount	The same editor invoices use, opened with one tap on the pencil icon
5	Editing a Credit Note — Company Details, Note & Stamp	The finishing details, and how to save your changes
6	After You Save — Confirmed Instantly	One edit updates the credit note everywhere it's used, with nothing else to sync

1

Creating a Discount / Return

Start from Book → Reserve Sessions

The exact same screen used to sell a package — Client buys a package → generates invoice amount to be paid

Service Type

Choose "Discount / Return (custom)" at the bottom of the list — the form switches into credit mode

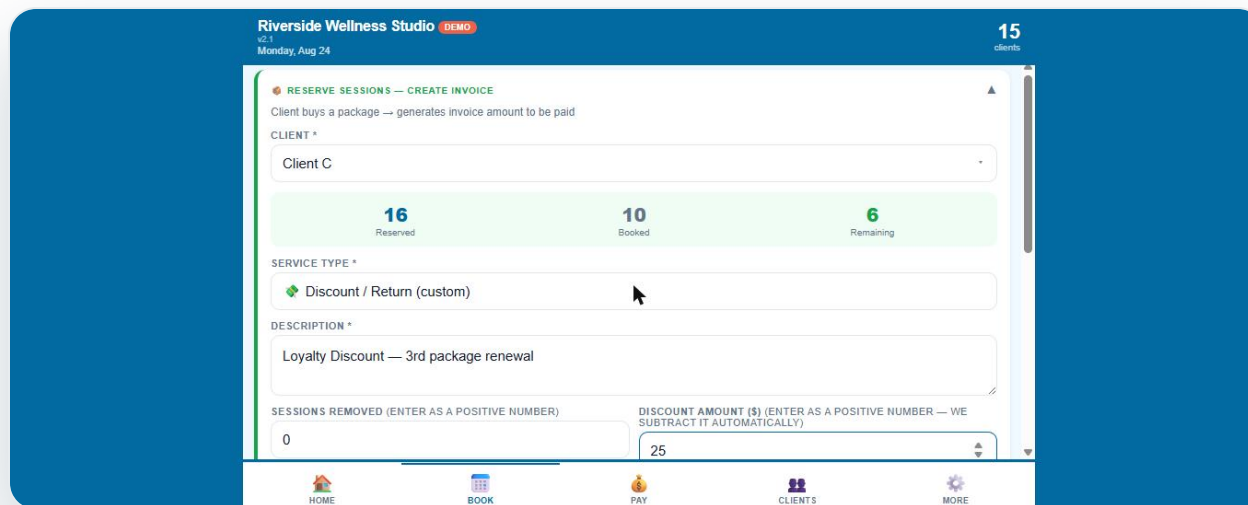
Description (required)

A short reason, e.g. "Loyalty Discount — 3rd package renewal"

Sessions removed & Discount Amount (\$)

Both entered as positive numbers — BiFlow subtracts them automatically

Cases work differently: inside an open Case there's a dedicated "Add Credit Note" button. This Discount / Return method is for everyday Package and Direct-Booking sales, which don't have a separate button.



Riverside Wellness Studio **DEMO** 15 clients
v2.1
Monday, Aug 24

RESERVE SESSIONS — CREATE INVOICE

Client buys a package → generates invoice amount to be paid

CLIENT *

Client C

16 Reserved 10 Booked 6 Remaining

SERVICE TYPE *

Discount / Return (custom)

DESCRIPTION *

Loyalty Discount — 3rd package renewal

SESSIONS REMOVED (ENTER AS A POSITIVE NUMBER) 0

DISCOUNT AMOUNT (\$) (ENTER AS A POSITIVE NUMBER — WE SUBTRACT IT AUTOMATICALLY) 25

HOME BOOK PAY CLIENTS MORE

2

Reviewing the Total Before You Submit

Applies to Package (optional)

Link it to one specific package so only that package's remaining sessions are reduced — not its price

Invoice Amount flips negative

For this example it shows -\$25, so it's unmistakably a credit rather than a charge

Date

Defaults to today, editable like any other document

Reserve Package & Create Invoice

Same button as a normal sale — BiFlow reads the Discount/Return type and creates a proper Credit Note behind the scenes

The screenshot shows the 'Riverside Wellness Studio' app interface. At the top, the header bar is blue and contains the studio name, version 'v2.1', the date 'Monday, Aug 24', and a client count of '15 clients'. Below the header, the main content area is white. It starts with a dropdown menu showing '— Not linked to any package —'. Below this is a green bar with the text 'Invoice Amount' and a value of '-\$25'. Underneath is a 'DATE' field with the value '24-Aug-2026' and a calendar icon. Below the date is a 'NOTE' field with the placeholder text 'e.g. Package 1, first payment...'. At the bottom of the form is a green button with a red icon and the text 'Reserve Package & Create Invoice'. Below the form is a blue bar with a book icon and the text 'BOOK APPOINTMENT'. At the very bottom is a navigation bar with five icons: a house for 'HOME', a calendar for 'BOOK', a coin for 'PAY', a group of people for 'CLIENTS', and a gear for 'MORE'.

3

Where It Shows Up — the Client Statement

Client Statement → Credit Notes

Every credit for that client, kept separate from their Invoices section

A real document number

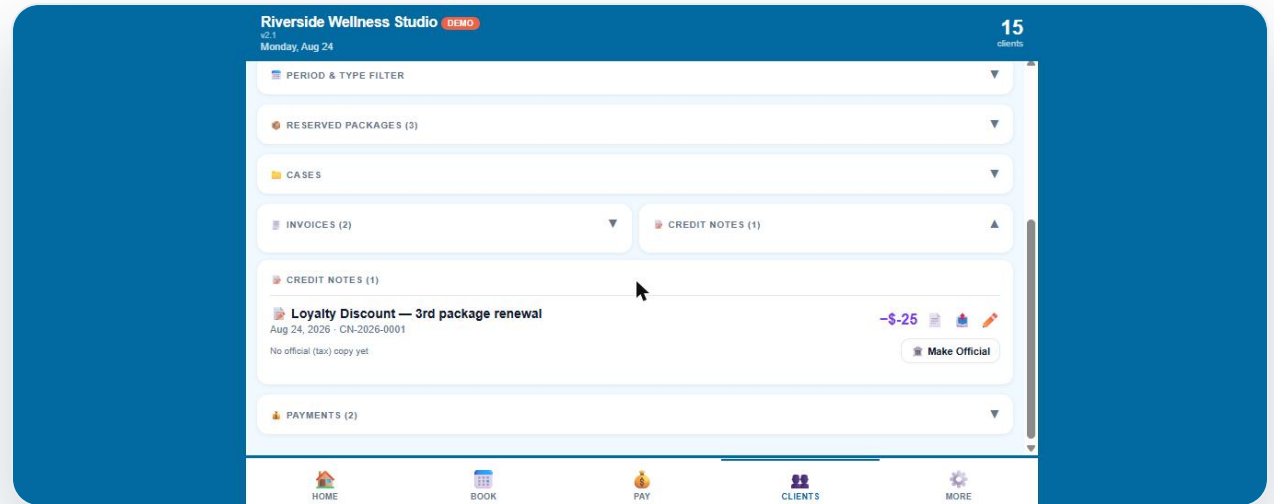
This one was assigned CN-2026-0001 — the same numbering system used for INV- invoices

Same actions as an invoice

Print, Share, Edit (the pencil icon), and Make Official if a tax copy is ever needed

Balance updates instantly

Client C's balance dropped by exactly this credit note's amount the moment it was created



4

Editing a Credit Note — Date, Description & Amount

Tap the pencil (✎) on any Credit Note row

Opens the same editor invoices use — labeled "Edit Credit Note" so it's always clear what you're changing

Date & Description

Fully editable, exactly like any other document

Amount (\$)

Enter it as a positive number — BiFlow subtracts it automatically, the same convention as creating one

Total

Recalculates live as you type, always shown as a negative figure

✎ Edit Credit Note

×

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

DATE

24-Aug-2026

📅

DESCRIPTION

Loyalty Discount — 3rd package renewal

AMOUNT (\$) (POSITIVE NUMBER — WE SUBTRACT IT AUTOMATICALLY)

25

Total

-\$25

COMPANY DETAILS (THIS DOCUMENT ONLY)

Company name, MOF #, address...

NOTE

5

Editing a Credit Note — Company Details, Note & Stamp

Company Details (this document only)

Override company info for one specific document without touching client-wide settings

Note

Free text for internal context — not shown to the client

Show stamp & signature

On by default, matching every other BiFlow document

Save Changes

One tap — no separate confirmation step

DESCRIPTION

Loyalty Discount — 3rd package renewal

AMOUNT (\$) (POSITIVE NUMBER — WE SUBTRACT IT AUTOMATICALLY)

30

Total

- \$30

COMPANY DETAILS (THIS DOCUMENT ONLY)

Company name, MOF #, address...

NOTE

☒ SHOW STAMP & SIGNATURE ON THIS DOCUMENT

✓ Save Changes

6

After You Save — Confirmed Instantly

"✓ Invoice updated"

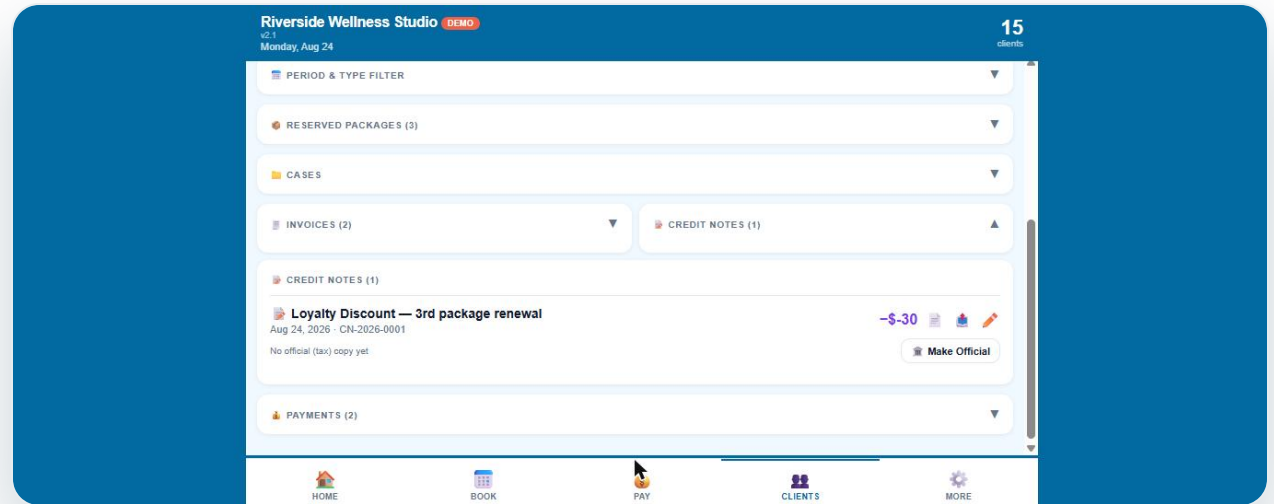
An instant confirmation toast, the same one used across every BiFlow edit

Updates everywhere at once

The new amount replaces the old one on the Credit Notes list, the Client Statement balance, and every report that reads from it — Cash Flow, P&L & VAT, and the VAT Report

Nothing else to sync

One edit is the whole job — there's no separate save or refresh step anywhere else in the app





You've completed the full training series!

From your first visitor on the website to editing a credit note — you now know everything BiFlow can do.

- ✓ **Part 1:** Website & Checkout
- ✓ **Part 2:** Getting Started
- ✓ **Part 3:** Clients & Sales Methods
- ✓ **Part 4:** Payments & Invoicing
- ✓ **Part 5:** Statements & Progress Tracking
- ✓ **Part 6:** Statistics, Messaging & Voice
- ✓ **Part 7:** Data, Backup & Subscription
- ✓ **Part 8:** Expenses & Financial Reports
- ✓ **Part 9:** Credit Notes for Everyday Sales

Questions? Reach out any time on WhatsApp: 03 980 631