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

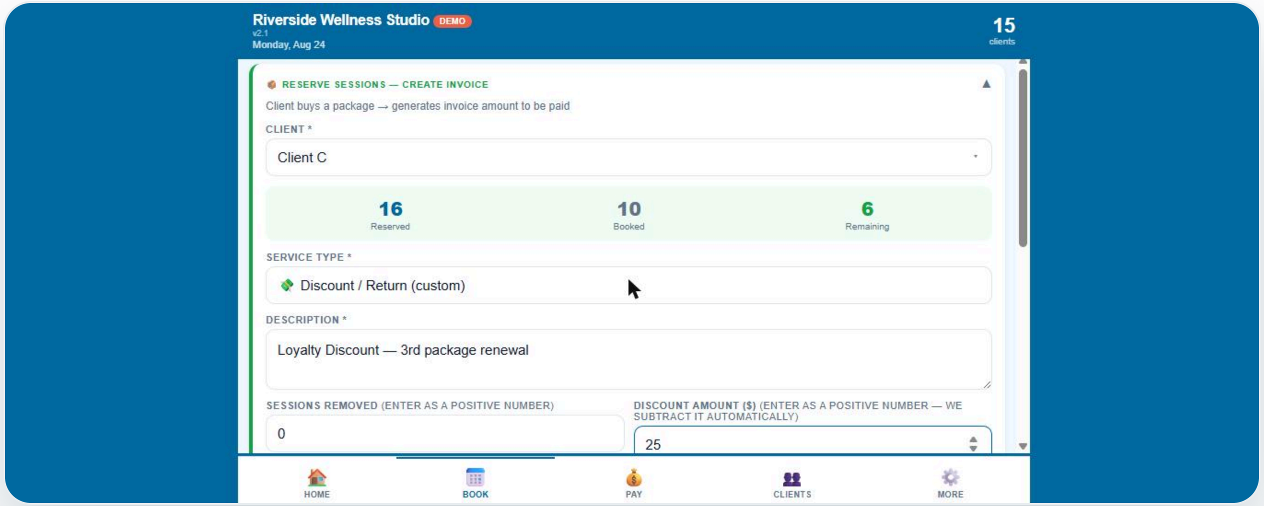
Choose "💸 Discount / Return (custom)" at the bottom of the list — the form switches into credit mode

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.

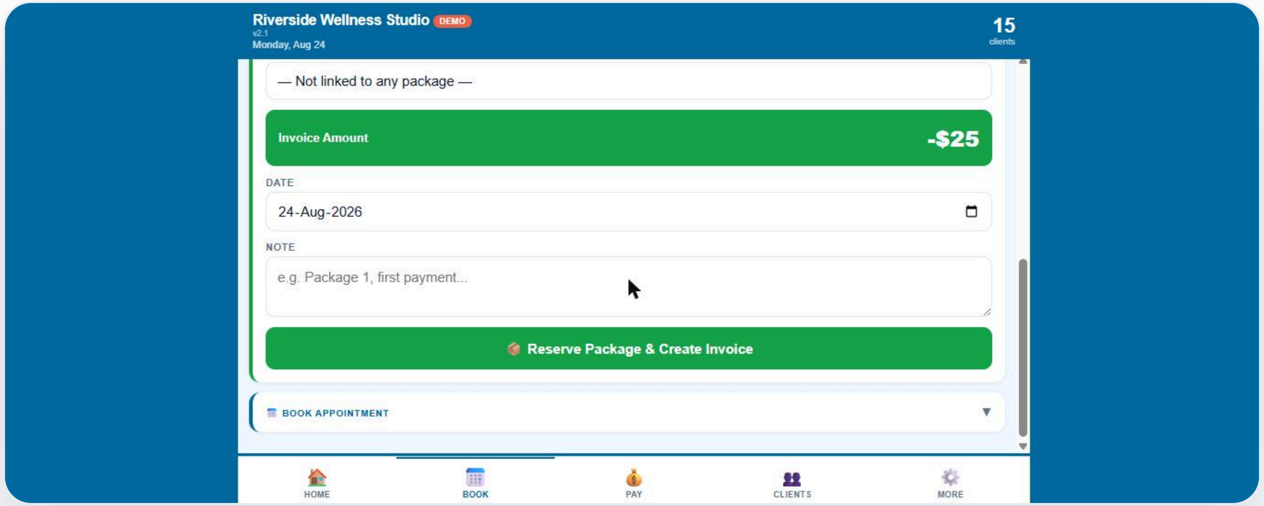
2 Reviewing the Total Before You Submit

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



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

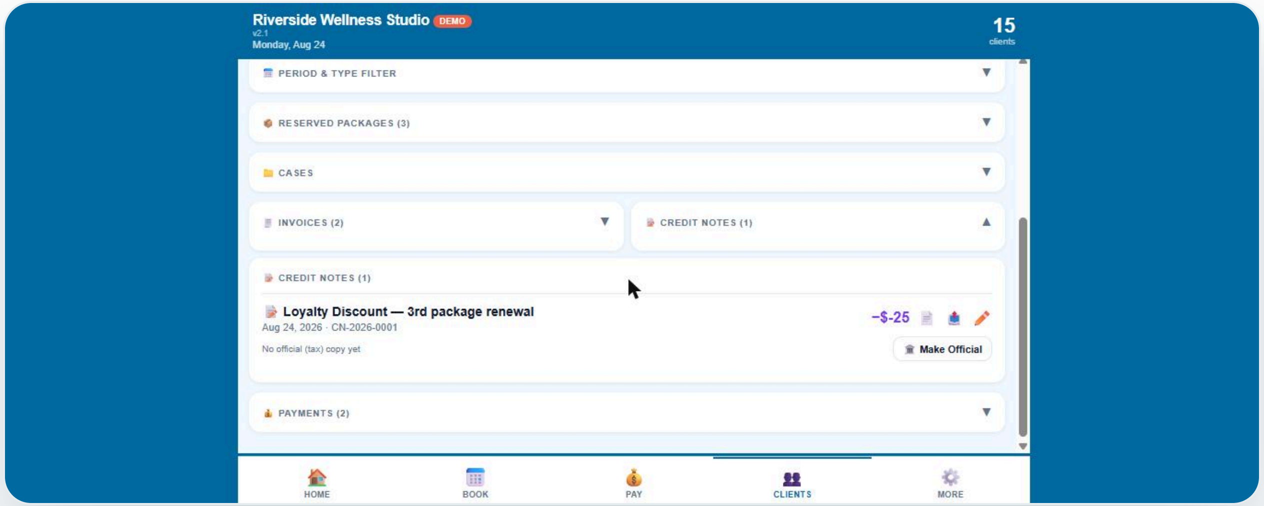
This one was assigned CN-2026-0001 — the same numbering system used for INV- invoices

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



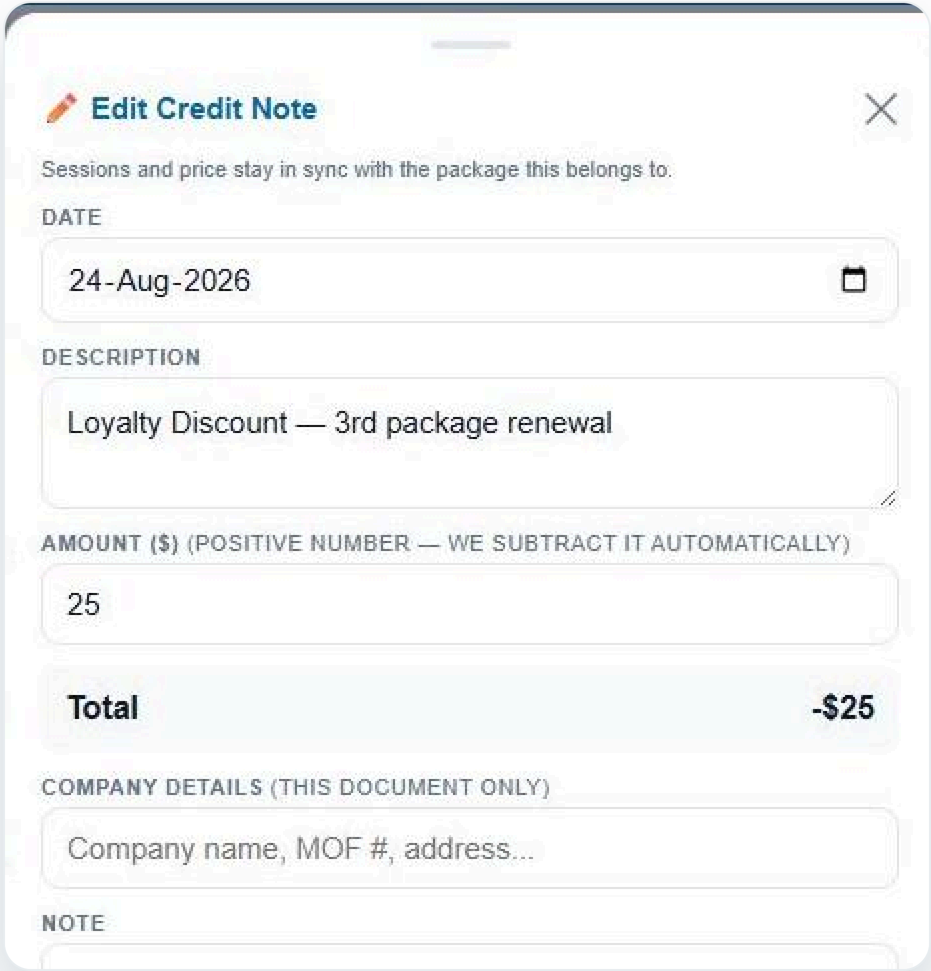
4 Editing a Credit Note — Date, Description & Amount

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



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

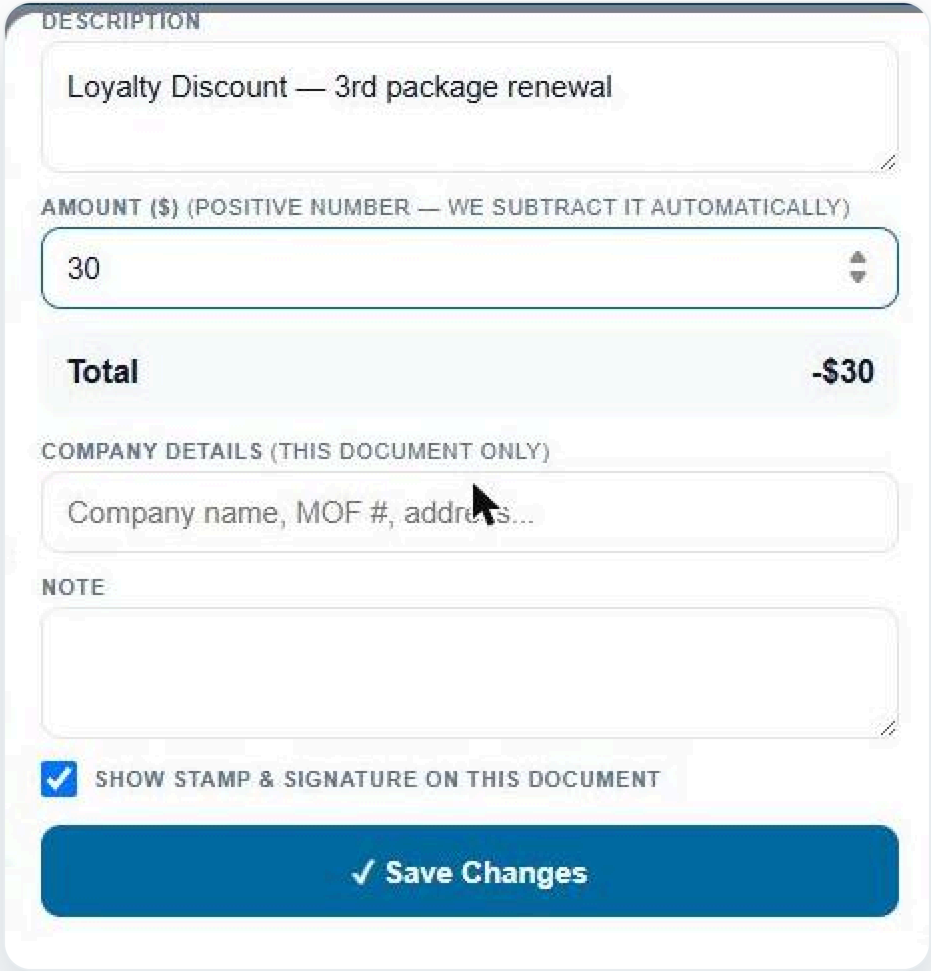
Free text for internal context — not shown to the client

Show stamp & signature

On by default, matching every other BiFlow document

Save Changes

One tap — no separate confirmation step



6 After You Save — Confirmed Instantly

"✓ Invoice updated"

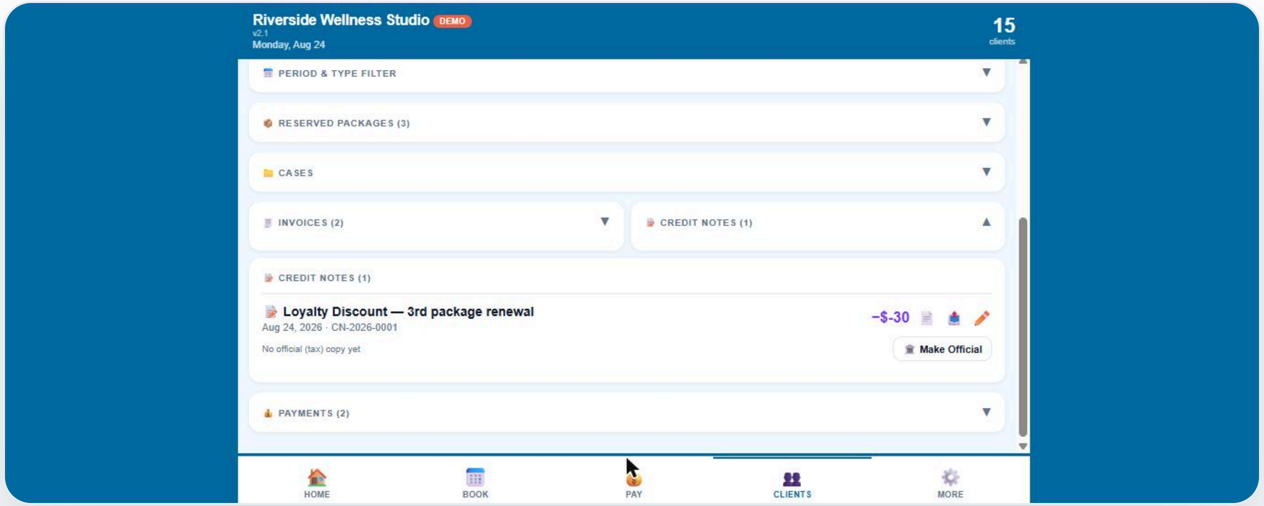
An instant confirmation toast, the same one used across every BiFlow edit

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