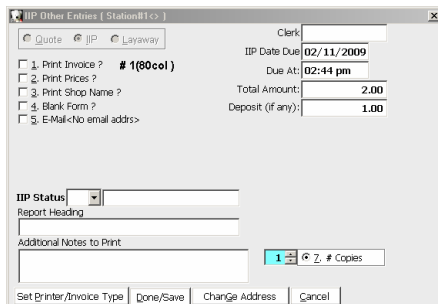


IIPs and End of the Year Reports

How to Create and Use IIPs

MicroBiz includes the option for you to use IIPs (Invoice in Progress). This will allow a customer to start a transaction, make a payment, and return at a later time to finalize the sale. The proper way to create and use the IIP feature:

1. Load an "F3 -Item" and "F8-Cust" to the Work Screen. You **must** have a customer loaded to the Work Screen. This is how MicroBiz will know where to save the invoice!
2. **Creating IIP** - When you are ready to start your IIP, make a payment or save the invoice by typing in "IIP" in the SKU box and hitting <enter>. You will then be shown the "IIP Other Entries" screen. Make a deposit (or save) by entering in the correct amount in the "Deposit (if any)" field and the amount in the "Tender" field. Click "Done/Save" to finish the payment (or save the IIP).



IIPs Other Entries Screen

3. **Making a Payment** - When the customer returns and is ready to make a payment, load the "F8-Cust" to the Work Screen, type in "IIP" in the SKU box, and hit <enter>. Load the correct IIP in the list by clicking the "Load" button. Again, type in "IIP" in the SKU box and hit <enter>. Follow the same steps on the "IIP Other Entries" screen to make a deposit.
4. **Finalizing IIP** - When the customer is ready to finalize and make the last payment on an IIP, load the "F8-Cust" to the Work Screen type in "IIP" in the SKU box, and hit <enter>. Load the correct IIP in the list by clicking the "Load" button. Click on "F9-Print" and complete the IIP like any other transaction.

***Note** - If you wish to clear the Work Screen, you must first save your IIP. Do not use the "F4-Clear" button with the IIP loaded as you could lose it!

Important Reports for End of the Year

It is the end of the year, which means you may need to print out reports that contain useful information that pertain to your business.

Inventory Reports

Inventory reports can be found under "Inventory" - "Inventory Reports." This will list information about all of your items, sorted by the filters listed. The [Inventory Audit](#) report is particularly useful. It will list the product movement of all inventory items with activity within a date range, sorted by SKU. Also, the [Physical Count](#) report will print out a list of all of your items, along with a field to enter in an amount for those doing inventory.

Sales Reports

Sales reports can be found under "Reports" - "Sales." These reports can give you information regarding the transactions done during the year. The [Sales Journal](#) report will show every individual transaction done throughout the year. Please note that "Invoices in Progress" and "Layaways" will be shown on the report the day that they have been finalized. The [Sales Summary](#) report will give you a breakdown of total sales done for the day. Please note that this report is based on your closeout data.

Cost of Goods Display

The [Cost of Goods Display](#) report can be found under "Reports" - "Cost of Goods Display." This report will display your total number of units, total cost of goods, and your total retail value. This is a very useful report to display before and after doing your inventory.

Balance Due Reports

[Balance Due Reports](#) can be found under "Customers" - "Balance Due." From here, you will be able to view your customers' Balance Due Reports, Credit Reports, and Customer Statements. These reports are extremely helpful to keep track of money still outstanding at the end of the year.

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