Sapphire — Event Invoicing UX Brief (Condensed + Invoice Examples)

Audience: Product Designer

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1. Core Concept

The invoicing system reflects **registration → order → invoice → payment** cycles. Each order revision creates a new invoice, showing **what changed** and **how prior payments apply**.

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2. High-Level Flow

1. Company registers for an event and submits rosters.
2. System calculates pricing using business rules.
3. Generates **Order v1 → Invoice #1001.**
4. Company pays (full or partial). Payments allocate **FIFO.**
5. Edits create **Order v2 → Invoice #1002 (delta)**.
6. Each invoice includes: full totals + "Changes since last invoice."
7. Payments reallocate; credits/refunds handled via defined rules.

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3. Refunds & Credit Handling

- **Within refund window:** refund to original method.
- **Past refund window:** issue **Credit Note** (on account).
- **Negative invoice balance:** auto-convert to Credit Note.
- Maintain visible **audit trail** of credits, refunds, and reallocations.

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4. Price Protection / Commitment Floors

- After a **cutoff**, each category/team has a **minimum billable quantity.**
- Reductions below that floor don't reduce billing — display a flag ⚭ **Commitment Protection.**
- UI should surface this in the delta table and totals.

5. Invoice Layout (Designer Reference)

Standard Invoice (no edge cases)

```
Invoice #1001        Issued: Oct 15, 2025
Order: v1  |  Event: Sapphire Classic  |  Club: North Shore Cheer

A. CURRENT CHARGES
Category                               Qty   Unit   Line Total
─────────────────────────────────     ───   ────   ─────────
Level 2 Youth – Athlete Slots           22    $95   $2,090
Level 3 Junior – Athlete Slots          19    $105  $1,995
Coach Pass (first 2 free, extras billable)   0    —      —
Subtotal $4,085 | Tax $531.05 | **Total $4,616.05**

B. PAYMENTS
Payment received: $2,466.22 (Visa ••1287)  → Remaining $2,149.83
[Badge: Partially Paid]
```

Delta Invoice (Added & Removed Athletes)

```
Invoice #1002        Issued: Oct 20, 2025
Order v2 (was v1 Oct 15) | Event: Sapphire Classic | Club: North Shore Cheer

A. CURRENT CHARGES
Category                               Qty   Unit   Line Total
─────────────────────────────────     ───   ────   ─────────
Level 2 Youth – Athlete Slots           24    $95   $2,280
Level 3 Junior – Athlete Slots          18    $105  $1,890
Coach Pass (extra)                       1    $60   $60
Late Add (after Oct 15)                  2    $15   $30
Subtotal $4,365 | Tax $567.45 | **Total $4,932.45**

B. CHANGES SINCE LAST INVOICE (#1001)
Category                               ΔQty  ΔAmount   Reason
─────────────────────────────────     ───   ───────   ──────────────
Level 2 Youth – Athlete Slots           +2    +$190     roster add
Level 3 Junior – Athlete Slots          −1    −$105     roster remove
Coach Pass (extra)                      +1    +$60      3rd coach billable
Late Add                                +2    +$30      after cutoff

C. PAYMENTS & BALANCE
Prev payments applied to #1001:              $2,466.22
```

```
New payment(s) received:             $1,500.00
**Balance due:**                     **$966.23**
```

Edge Case: Refund / Credit Note

```
Invoice #1003        Issued: Oct 25, 2025
Order v3 | Adjustment after roster reduction

A. CURRENT CHARGES
Category                              Qty   Unit   Line Total
─────────────────────────────────    ───   ────   ────────

Level 2 Youth – Athlete Slots          20   $95    $1,900
Level 3 Junior – Athlete Slots         18   $105   $1,890
Subtotal $3,790 | Tax $493.70 | **Total $4,283.70**

B. CHANGES SINCE LAST INVOICE (#1002)
Category                              ΔQty   ΔAmount    Reason
─────────────────────────────────    ───   ───────    ──────────────

Level 2 Youth – Athlete Slots         −4    −$380       roster remove

C. REFUNDS / CREDITS
Past cutoff — credit applied to account.
→ Credit Note CN-002 created for $430.75
**Balance due:** $0.00
[Badge: Credit Issued]
```

Edge Case: Price Protection (Commitment Floor)

```
Invoice #1004        Issued: Nov 10, 2025
Order v4 | Adjustment after cutoff

A. CURRENT CHARGES
Category                              Qty   Unit   Line Total
─────────────────────────────────    ───   ────   ────────

Level 3 Junior – Athlete Slots         20   $105   $2,100   ⚙ Commitment
Protection
Late Add                              +1    $15    $15
Subtotal $2,115 | Tax $274.95 | **Total $2,389.95**

B. CHANGES SINCE LAST INVOICE (#1003)
Category                              ΔQty   ΔAmount    Reason
─────────────────────────────────    ───   ───────    ──────────────
```

```
Level 3 Junior - Athlete Slots          -2   $0        protected minimum
applies
Late Add                                 +1   +$15      added after cutoff


C. PAYMENTS
Credit Note CN-002 applied:              $430.75
New Payment:                             $1,959.20 (Visa ••6721)
**Balance due:**                          **$0.00**
```

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6. Visual Cues for Designer

- **ΔQty:** + in green, − in red.
- **Badges:** Partially Paid, Credit Issued, Commitment Protection.
- **Tooltips:** explain refund logic, cutoff rules, commitment floors.
- **Currency:** always 2 decimals; alignment right.

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7. Deliverables for Design

1. **Invoice UI Components:** consistent line spacing, grouped subtotals, colored delta indicators.
2. **Edge Case Views:** Credit Note / Commitment / Late Add states.
3. **Exported PDF Layout:** compact, readable, and math-auditable.

Goal: Designer can produce visually distinct yet consistent invoice templates that cover **standard, delta, refund, and commitment** scenarios.