



Interior Designer's Guide to the Houzz Pro Workflow

1. Create your proposal and send to your client for approval and full payment.
2. Log the payment on the proposal once received. If your proposal was paid through Houzz, skip this step.
3. Create an invoice from the proposal, then select **Actions** (located at the top), then **Issue Invoice**. Issuing locks the invoice for editing.
4. Create purchase orders (POs) from your paid and issued invoice by selecting **Actions**, then **Create Purchase Order(s)**.
5. Have your PO open for reference during the ordering process. POs should match the corresponding bill exactly, so edit the PO as needed.
6. Log the payment to the PO. This step syncs the PO to QBO, so if you aren't ordering right away, select **Actions**, then **Mark as Billed** or **Approve** to sync. Please note POs marked as approved or billed cannot be deleted.
7. If the PO was edited during the ordering process, you may need to adjust. Never alter invoices once created; any adjustments should be added to a new proposal.
8. If the vendor refunds you, don't edit the PO or PO payments - just let your bookkeeper know so it can be recorded in QBO, since Houzz doesn't have a vendor refund function.