

How to Create a Deliverable in theBOSSapp



1

While in the job that you want to create the deliverable for, in the right-hand column, click "Deliverables".


The screenshot displays theBOSSapp interface for a specific job. The breadcrumb navigation at the top reads: Home / Projects / PROJECT/0000005 / JOB/4. In the right-hand column, a vertical menu contains three items: 'Details', 'Documents', and 'Deliverables'. The 'Deliverables' item is highlighted with a yellow circle, indicating it is the selected option. Below this menu are two buttons: 'Generate Docket from Job' and 'Link Tender'. At the bottom of the right-hand column, a 'VALUE' section shows 'Estimated/Actual: \$0.00 / \$0.00'. The left-hand column contains a large empty box with 'Download Calendar Event' and 'Email Users' links, and a table with columns for 'Project', 'Invoice Not Required', and 'Copy Link'.


2 Click "ADD NEW DELIVERABLE"

Project: PROJECT/0000005 - 84 Mountain St, Ipswich
Address: 84 Mountain Street, Sydney, NSW, 2007
Expected Finish Date: 02/06/2023

Completed **Awaiting Invoice** Download Calendar Event Email Users

app.thebossapp.com.au/.../deliverables Move Project Invoice Not Required Copy Link



DELIVERABLE NAME	DELIVERABLE VALUE	DELIVERABLE STATUS	INVOICE STATUS
			

3 Click the "Name" field.

Search... DASHBOA

JOB/4 - ADMINIS

JOB/4 - A
Client: O'Connell,
Project: PROJEC
Address: 84 Mou
Expected Finish t

Completed

Add New Deliverable

Name *

Line Item Prefix

Leave blank if no prefix required.

Add in a note that will be prepended to all line items.

Recipients

Please select the people who you want to send this to.

Contacts

Please select the people who you want to act as contacts for this

4 Enter a name for your deliverable.

Add New Deliverable

Name *

Required

Line Item Prefix

Leave blank if no prefix required.

Add in a note that will be prepended to all line items.

Recipients

Please select the people who you want to send this to.

Contacts

Please select the person to act as contacts for this deliverable.

5 Type "Design Drawings"


6

Choose a recipient that you want to send the deliverable to. This list pulls from the projects contacts. These can be updated on the project page, in the right-hand column, under contacts.

Name *

Line Item Prefix

Add in a note that will be prepended to all line items.

Recipients 

Please select the people who you want to send this to.

Contacts

Please select the people to act as contacts for this

ADD NEW PRICE BELOW

Units *

Type *

Price *

7


Under contacts, choose any internal staff that you would also like to receive the deliverable.

Line Item Prefix

Add in a note that will be prepended to all line items.

Recipients

Please select the people who you want to send this to.

Contacts 

Please select the people from Demo Company v2 who you want to act as contacts for this.


PRICE BELOW

Units *

Type *

Price *

No comments added



8 Click the "Deliverable File" field to attach items such as a PDF or image file.

Client: O'Connell,
Project: PROJEC
Address: 84 Mou
Expected Finish

Completed

app.thebossapp.com.a

DELIVERABLE NAME

Add in a note that will be prepended to all line items.

Recipients

Please select the people who you want to send this to.

Contacts

Please select the people from Demo Company v2 who act as contacts for this.

Deliverable File

Units * **Type *** **Price ***

Quantity *

Delete

9 Click here.

Expected Finish

Completed

app.thebossapp.com.a

DELIVERABLE NAME

act as contacts for this.

Deliverable File

Units * **Type *** **Price ***

Quantity *

Each
Per Day
Per Hour
Per Kilometre
Per Metre
Per Month

10

Choose a deliverable type.
These are defined under Organisation -> Billable types

act as contacts for this.

File Browse

Type * Price *

IT Support
Onboarding Time
Report
Senior Technician Time
Server Maintenance

Delete

Add Pricing

11

Click the "Price" field.
Click the "Quantity" field.

act as contacts for this.

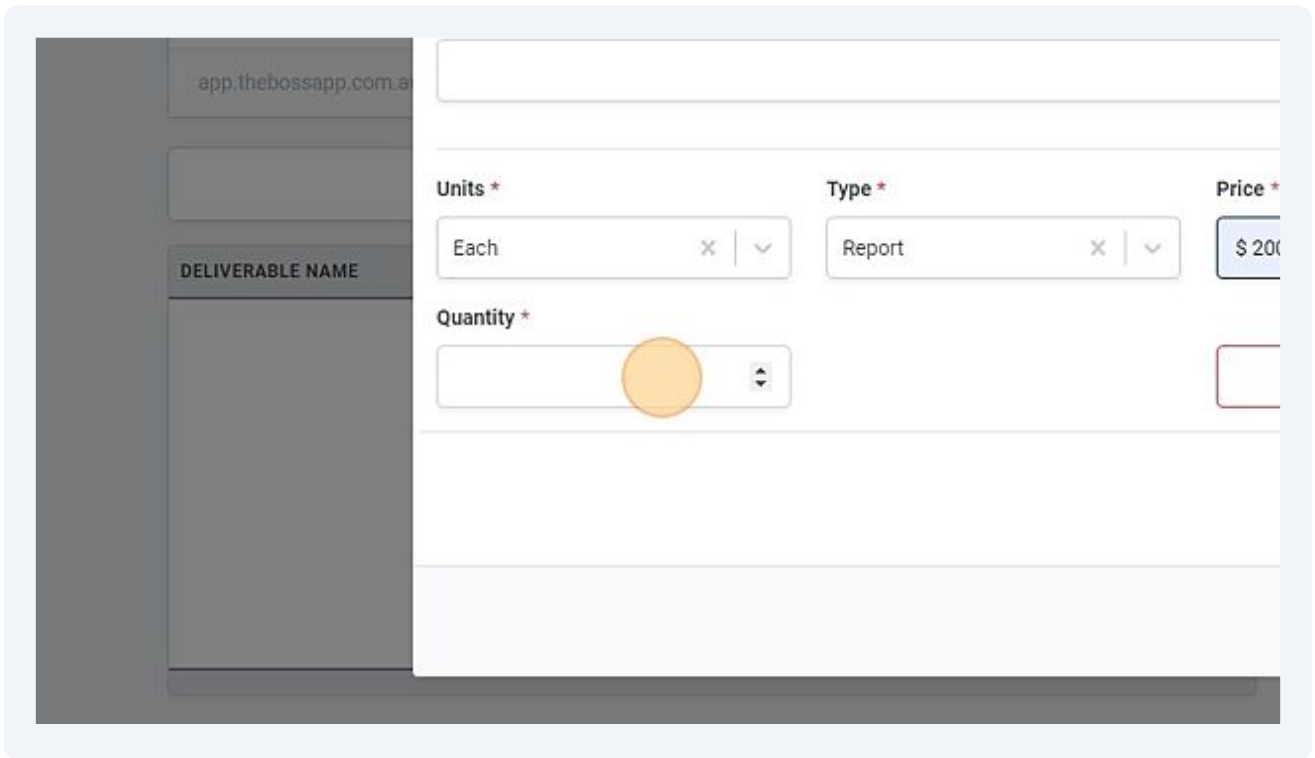
File Browse

Type * Price *

Report

Delete

Add Pricing



12

Enter a price and quantity.
If you need to add additional line items, click "Add Pricing".
Click "Save".

