

# How to Create an Invoice and Send It



1 Click "Invoices"

A screenshot of a software interface. On the left, there is a header area with the text 'St, Ipswich' and two buttons labeled 'Chat' and 'Copy Link'. Below this is a section with the heading 'TEMPLATE' and a 'Number' field containing '005'. On the right, a vertical sidebar menu lists several options: 'Details', 'Overview', 'Documents', 'Jobs', 'Deliverables', 'Invoices', 'Purchases', 'Allowances', and 'Equipment'. The 'Invoices' option is highlighted with a thick orange circle. At the bottom of the sidebar, there is a section titled 'PROJECT VALUE'.

2 Click "ADD INVOICE"

The screenshot shows a mobile application interface for managing invoices. At the top, there are two status indicators: a red pill-shaped button labeled "\$220.00 overdue." and a blue pill-shaped button labeled "\$220.00 unpaid.". Below these, the client information is displayed: "Client: O'Connell, Bogisich and Carter" and "Address: 84 Mountain Street, Sydney, NSW, 2007". A blue "Open" button is positioned below the address. The interface includes a search bar with the text "app.thebossapp.com.au/.../invoices" and a "Chat" button. A prominent yellow circular callout highlights the "+ ADD INVOICE" button. To its right is a "+ ADD CREDIT NOTE" button. Below the buttons, a note states "All prices exclude GST." with a small "Ov" icon. A search bar with the placeholder "Search..." is visible. At the bottom, a table lists invoice details:

INVOICE NUMBER	DETAILS	PAID DATE	INVOICE VALUE
INV-8	Invoiced on 01/06/2023	-	\$ 200.0

3 Click the "Add Deliverables" drop down to select any deliverables that are yet to be invoiced.

The screenshot displays a mobile application interface for adding deliverables. A yellow circular callout highlights a dropdown menu with a downward arrow. Below the dropdown is an "Add" button. Further down, there are "Add All" and "Remove All" buttons. A search icon is visible in the bottom right corner. At the bottom, a table lists deliverable details:

DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE
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AGGREGATE LINE ITEMS BY JOBS

+ REQUEST INVOICE

Add Deliverables

Deliverable  Add

JOB/4 - Administration Job - Design Drawings

JOB/4 - Administration Job - Maintenance Manuals

Search...

<input type="checkbox"/>	JOB	DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE

sapp.com.au/.../deliverables

Copy Link

AGGREGATE LINE ITEMS BY JOBS

+ REQUEST INVOICE

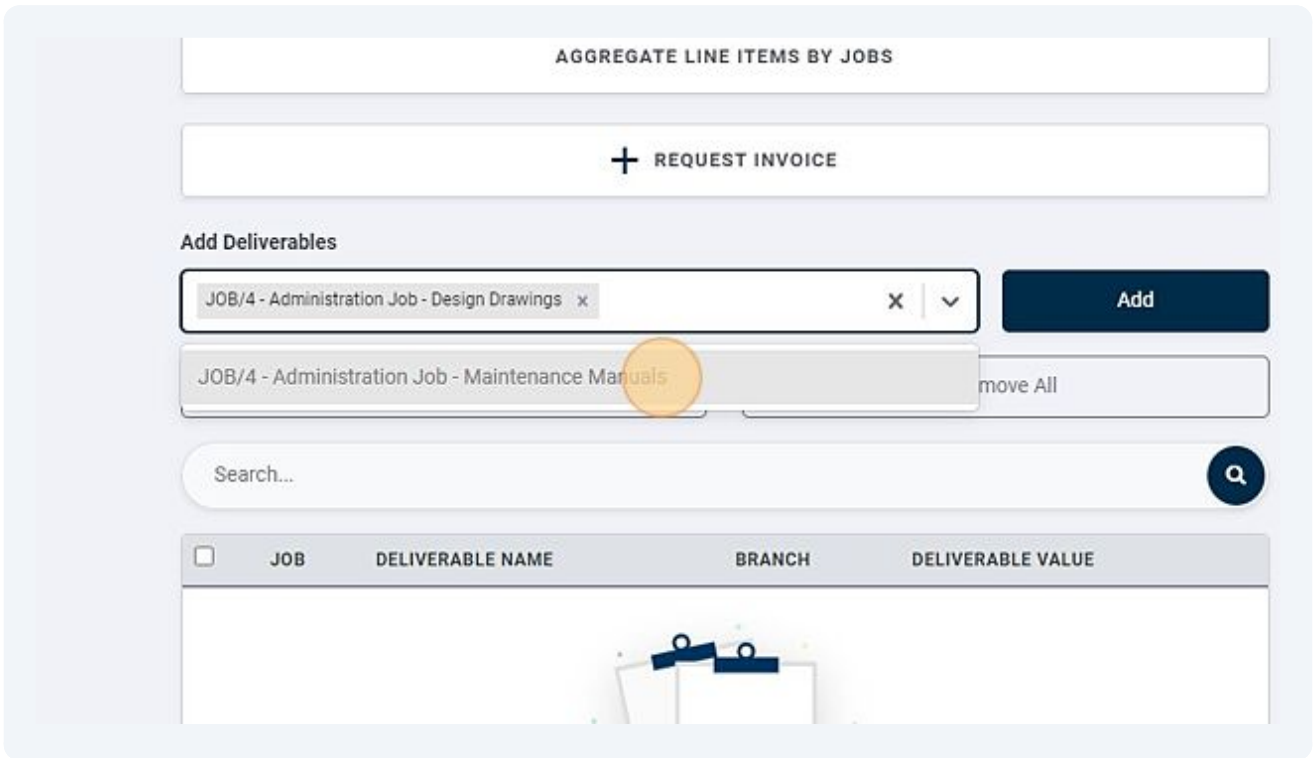
⌵

Administration Job - Design Drawings x

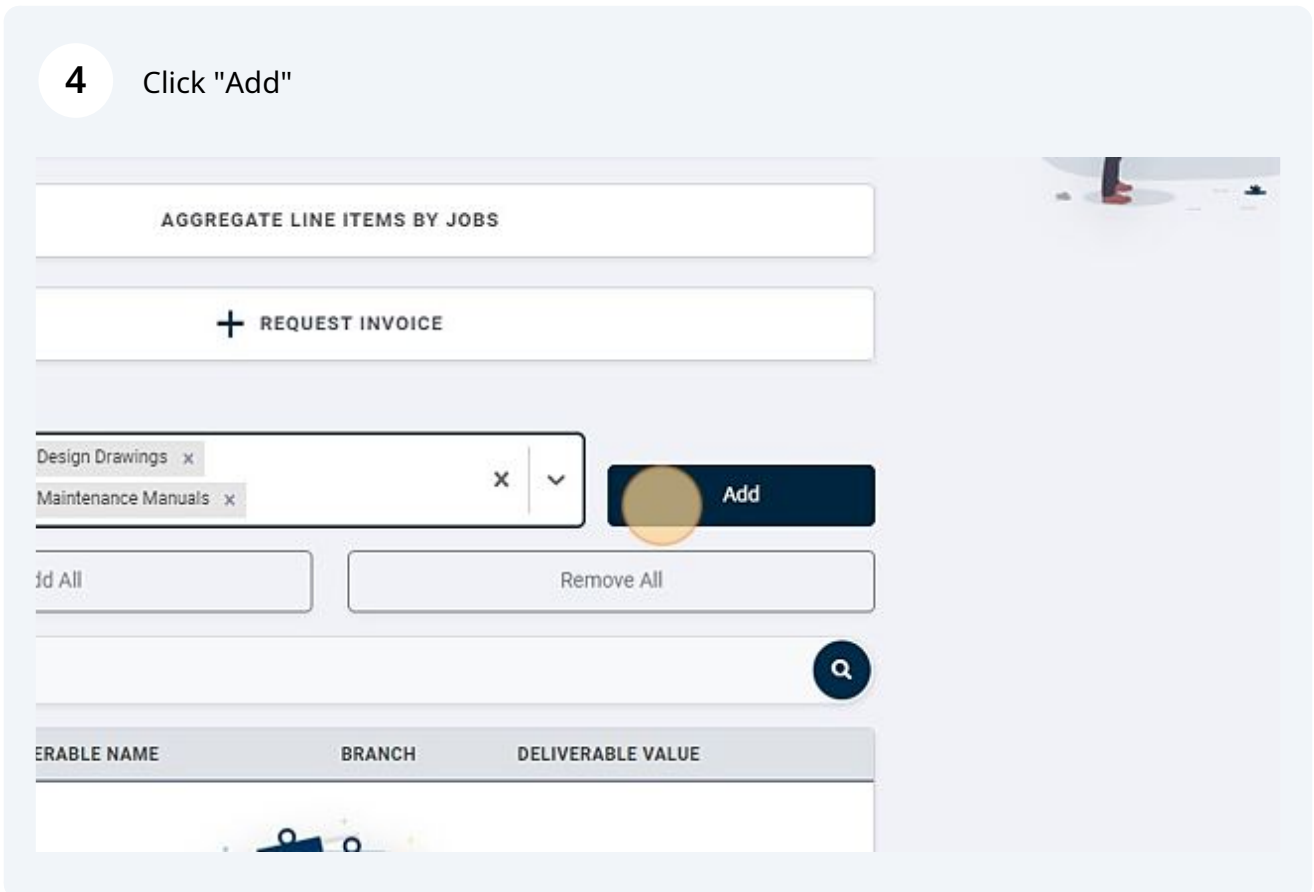


DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE
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4 Click "Add"



5

Click "REQUEST INVOICE" which labels the invoice as completed.

If your Xero integration is enabled, the button will say "APPROVE AND SEND INVOICE" which will send the invoice through to Xero.

Created At: 02/06/2023

Invoice Not Requested

app.thebossapp.com.au/.../deliverables Copy Link

AGGREGATE LINE ITEMS BY JOBS

DOWNLOAD INVOICE + REQUEST INVOICE SEND INVOICE

Search...

<input type="checkbox"/>	JOB	DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE
<input type="checkbox"/>	JOB/4 - Administration Job	Design Drawings	Software - Gold Coast	\$ 200.00
<input type="checkbox"/>	JOB/4 - Administration Job	Maintenance Manuals	Software - Gold Coast	\$ 200.00

6

Click "SEND INVOICE" to bring up the send dialog and choose your recipients. The email will use the invoice template defined in Organisation -> Templates.

023

iles: Copy Link

AGGREGATE LINE ITEMS BY JOBS

MARK AS INVOICED UNMARK AS READY TO BE INVOICED SEND INVOICE

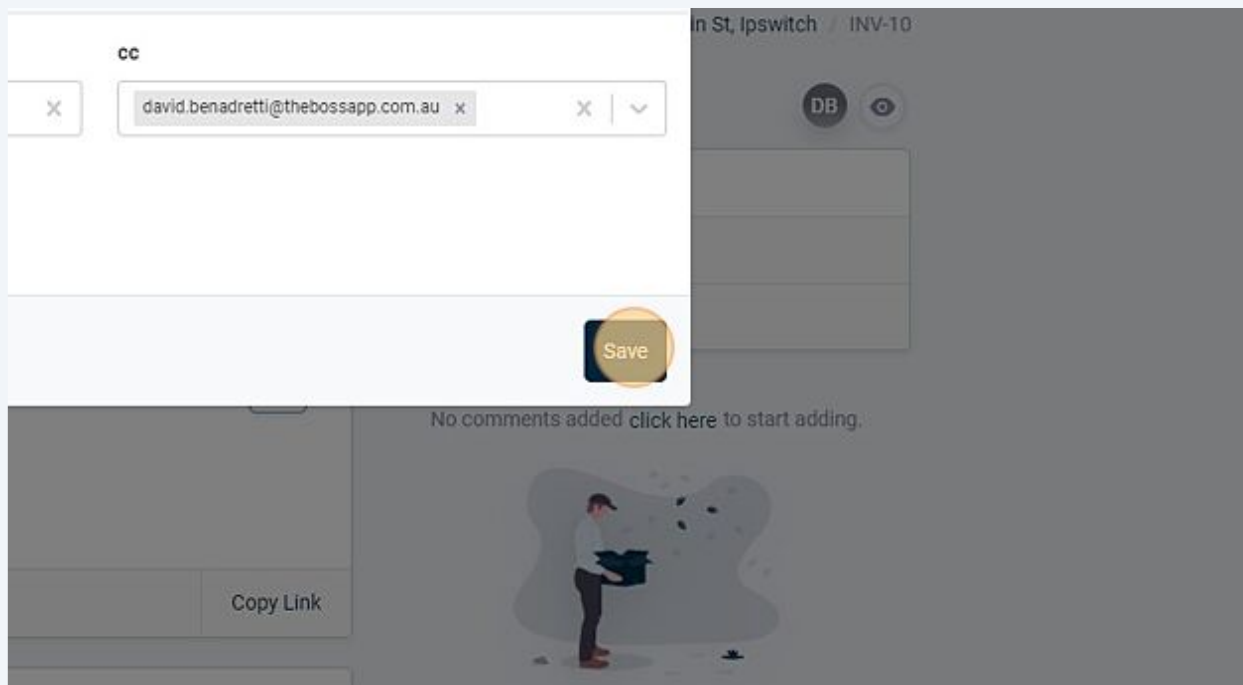
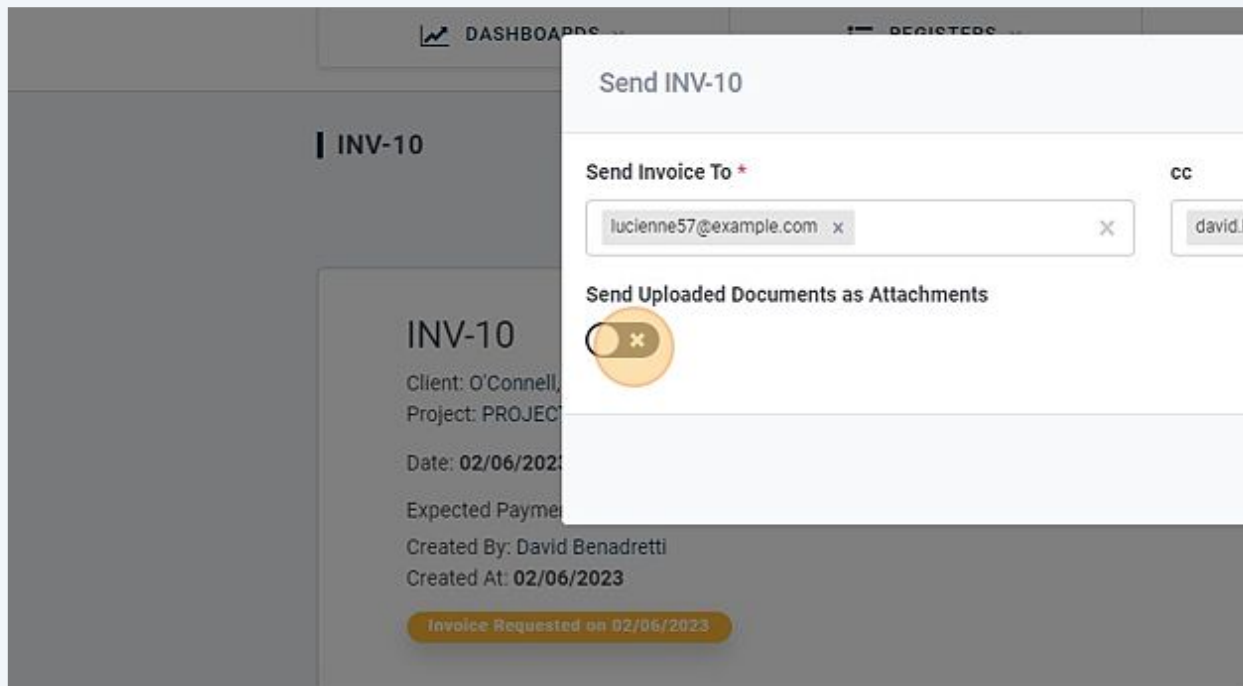
Search...

DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE
Design Drawings	Software - Gold Coast	\$ 200.00
Maintenance Manuals	Software - Gold Coast	\$ 200.00



7

Enable the "Send Uploaded Documents as Attachments" toggle to include any files that are attached to your deliverables. Click "Save" to send the invoice.



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Click "MARK AS INVOICED" to change the label to show that the invoice has been sent to a client.

Created At: 02/06/2023

Invoice Requested on 02/06/2023

app.thebossapp.com.au/.../deliverables Copy Link

AGGREGATE LINE ITEMS BY JOBS

 **DOWNLOAD INVOICE**   **+**   **MARK AS INVOICED**   **-**   **UNMARK AS READY TO BE INVOICED**    **SEND INVOICE**

Search...

<input type="checkbox"/>	JOB	DELIVERABLE NAME	BRANCH	DELIVERABLE VALUE
<input type="checkbox"/>	JOB/4 - Administration Job	Design Drawings	Software - Gold Coast	\$ 200
<input type="checkbox"/>	JOB/4 - Administration Job	Maintenance Manuals	Software - Gold Coast	\$ 200

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The invoice is now marked as "Invoiced".

**INV-10**

Client: O'Connell, Bogisich and Carter  
Project: PROJECT/0000005 - 84 Mountain St, Ipswich

Date: 02/06/2023



Expected Payment Date: 09/06/2023

Created By: David Benadretti  
Created At: 02/06/2023

Invoiced on 02/06/2023

app.thebossapp.com.au/.../deliverables Copy Link

AGGREGATE LINE ITEMS BY JOBS

 **DOWNLOAD INVOICE**   **-**   **UNMARK AS INVOICED**    **SEND INVOICE**