1. Introduction
   1. Tired of complicated reconciliations and identifying problems in your invoicing?
   2. With our easy to use and reliable reconciliation tool you can easily identify missing items on your invoice, or add sales right to your system of record by adding them to your invoice
   3. Note, in order to use this feature, you must first set up a system of record in the settings page
2. Step by Step
   1. First, start by opening an invoice that has an error from the dashboard
   2. Next, note any invoice items that are labeled in red
      1. These items do not have a corresponding sale in your system
      2. Take a moment to identify why.
         1. Perhaps you voided the sale
            1. In this case you can remove the item from the context menu
         2. Maybe this was a custom item that hasn’t made it back to your system yet
            1. If this is the case, simply click on the menu next to the item and select “Add To System”
   3. Next, open the System Sales fly-in to the right
      1. Here you can select a date range, but that range will default to the billing period of this invoice
      2. Check the items in the invoice
         1. Yellow Items are those which are not added to this invoice, but our software has determined that they should not be because they fall outside of the billing period
         2. Red Items are those which are not added to this invoice, but they should. You can add them by clicking on the context menu and selecting “Add to Invoice”
         3. Items with no highlights are on this invoice and in your system
   4. Once you’ve completed this, you can save your invoice or send it immediately
3. Conclusion

\*\*Script:\*\*

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\*\*[Opening Scene: Soft, focused music plays. A business owner stares at a computer screen with a confused expression, surrounded by a cluttered desk of invoices and papers.]\*\*

\*\*Narrator (empathetic tone):\*\*

"Does reconciling invoices leave you frustrated and overwhelmed? Missing items, mismatched records, and endless manual checks can take up valuable time and energy. But it doesn’t have to be this way."

\*\*[Scene Transition: A sleek interface of the reconciliation tool in action.]\*\*

\*\*Narrator (confident tone):\*\*

"Introducing our easy-to-use and reliable reconciliation tool. With just a few clicks, you can identify missing items, correct errors, and even add sales directly to your system of record—all while keeping everything perfectly synced."

\*\*[Text on screen: 'Note: Ensure your system of record is set up in the settings page.']\*\*

\*\*Narrator:\*\*

"Getting started is simple, but remember, you’ll need to set up your system of record in the settings page before using this feature."

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\*\*[Scene Transition: A step-by-step guide overlay with visuals of the software dashboard.]\*\*

\*\*Narrator:\*\*

"Let’s walk through the process step by step."

\*\*[Scene: Dashboard showing an invoice with an error notification.]\*\*

\*\*Narrator:\*\*

"First, open an invoice that has an error from the dashboard. Items labeled in red indicate there’s no corresponding sale in your system. Take a moment to identify why."

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\*\*[Scene: A red-labeled item highlighted with a context menu open.]\*\*

\*\*Narrator:\*\*

"Maybe the sale was voided. In that case, you can easily remove the item using the context menu. Or perhaps it’s a custom item that hasn’t yet made it back to your system. No problem—just click the menu and select 'Add to System.'"

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\*\*[Scene Transition: Fly-in menu labeled 'System Sales' opening on the right side of the screen.]\*\*

\*\*Narrator:\*\*

"Next, open the System Sales fly-in to the right. Here, you can adjust the date range, but by default, it matches the billing period of the invoice. Now, take a closer look at the items in the invoice."

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\*\*[Scene: Yellow, red, and unhighlighted items displayed with their meanings labeled.]\*\*

\*\*Narrator:\*\*

"Yellow items fall outside the billing period, so they won’t be added to this invoice.

Red items, however, \*should\* be included. Simply click the context menu and select 'Add to Invoice' to fix them.

Items with no highlights? You’re good to go—they’re already in both the invoice and your system."

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\*\*[Scene Transition: A polished invoice being saved and an option to 'Send Invoice' appearing.]\*\*

\*\*Narrator:\*\*

"Once you’ve reviewed and corrected everything, you can save your invoice or send it immediately—all with confidence that everything is accurate and synced."

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\*\*[Closing Scene: Smiling business owner reviewing an error-free dashboard, feeling accomplished.]\*\*

\*\*Narrator (encouraging tone):\*\*

"Our reconciliation tool makes invoice management faster, easier, and stress-free. Say goodbye to complicated reconciliations and hello to peace of mind."

\*\*[Text on screen: 'Learn more at [website URL] and take control of your invoicing today.']\*\*

\*\*Narrator:\*\*

"Try it now and discover the difference automation can make!"

\*\*[Music fades out, leaving the website URL on screen.]\*\*

\*\*End of Video.\*\*