1. Introduction
   1. This tutorial will show you how to create your first invoice
2. Steps
   1. First, click on a client
      1. Alternatively you can click on “New Invoice” and populate the client manually
   2. Next click on “New Invoice”
   3. Set your billing period and terms
   4. Next click on “Add Items”
      1. The screen will populate all the sales from your system of record
      2. From here you will see the items are all red
         1. This is because none of them have been added to the invoice
         2. You can select “Add All” to add all of these sales to your invoice
      3. Next return to your invoice
      4. Click “Save”
         1. This will send the invoice back to your system of record to ensure that your records match
      5. If you feel comfortable, click “Send” to send the invoice to the client
         1. Emails are sent from our email address by default, but you can customize the smtp settings to send from your email address by using the settings page

\*\*Script: Creating Your First Invoice\*\*

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\*\*[Opening Scene]\*\*

(Background music plays softly. A professional yet approachable voice begins narrating.)

\*\*Voiceover:\*\*

"Welcome! In this tutorial, we’re going to walk you through how to create your first invoice. By following these simple steps, you’ll be able to send professional invoices with ease."

\*\*[Scene Transition: Dashboard Interface]\*\*

\*\*Voiceover:\*\*

"Let’s get started. First, you’ll need to select a client. Simply click on an existing client from your client list. If your client isn’t listed yet, no problem—just click on 'New Invoice' and manually enter the client details."

\*\*[On-Screen Action: User clicks 'New Invoice.']\*\*

\*\*Voiceover:\*\*

"Once your client is selected, go ahead and click on 'New Invoice.' This will open up your invoice workspace."

\*\*[Scene Transition: Invoice Setup Page]\*\*

\*\*Voiceover:\*\*

"Next, set your billing period and payment terms. This step ensures your client knows exactly what they’re paying for and when payment is due."

\*\*[Scene Transition: Adding Items]\*\*

\*\*Voiceover:\*\*

"Now it’s time to add items to your invoice. Click on 'Add Items,' and you’ll see a list of sales automatically pulled in from your system of record. At this stage, the items will appear in red. Don’t worry—this just means they haven’t been added to your invoice yet."

\*\*[On-Screen Action: Items are selected and turn green.]\*\*

\*\*Voiceover:\*\*

"You can manually select individual items, or save time by clicking 'Add All' to include everything at once. Once that’s done, return to your invoice."

\*\*[Scene Transition: Saving the Invoice]\*\*

\*\*Voiceover:\*\*

"Now, click 'Save.' This step sends the invoice back to your system of record, ensuring everything stays perfectly aligned."

\*\*[Scene Transition: Sending the Invoice]\*\*

\*\*Voiceover:\*\*

"Finally, when you’re ready, click 'Send.' By default, invoices are sent using our email address. But if you’d prefer to use your own email, you can customize the SMTP settings in the settings page."

\*\*[Closing Scene: Client Receives Invoice]\*\*

\*\*Voiceover:\*\*

"And that’s it! You’ve successfully created and sent your first invoice. With just a few clicks, you’re ready to manage your billing like a pro."

\*\*[Outro Screen: Thank You and Support Info]\*\*

\*\*Voiceover:\*\*

"Thank you for watching! If you have any questions or need further assistance, visit our support page. Happy invoicing!"

\*\*[Music fades out.]\*\*

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This script fits comfortably within a 4-minute video, allowing time for smooth transitions and animations.