

Knowledge Base



Invoicing

Q: Can I create an invoice before the Bill of Materials is finalised, or before ordering any stock for the job?

A: Yes, although the kind of invoice you want to create will differ based on the type of job. The BOM is there to help you build quotes, but if your organisation has a different workflow it's still possible to invoice without filling every part of it out.

- You can use the Create Invoice from Quote from the Job Actions > Invoices page. You can use a draft quote/estimate as a starting point. However, since the BOM is not finalised, you may need to modify the General Quote Amount and remove items which are not finalised.
- You can also use the New Invoice button. For Do and Charge jobs, this will by default pull in only items which have been consumed onto the job. For fixed price jobs, you can remove any items you don't want to see and use the "+ Add a new line" button to create new line items you can customise to your liking.

If you just want to receive money prior to starting the job, though, you can also use [prepayments](#) to achieve the result you want.

Payment

Q: What options do I have for accepting payment in Gojee?

A: There are presently two options for taking payment from within Gojee – cash payments and digital

payments processed through Square. In Xero, you can also record bank transfers which will be processed through the nightly Xero sync and visible in Gojee.

You can take cash payments directly from within Gojee for all invoices and prepayments. If you enable Square integration, you will also be able to take card payments through Square either physically or digitally. Please refer to the [Organisation Add-ons](#) page for more information.

Bank transfers can be recorded through Xero for invoices. On any invoice, click Open in Xero at the top right.

Feedback

Open in Xero

Reference

3 - Job: J00004

Xero Invoice No.

ORC1050

From there, you can record payments to your organisation's bank or other fund accounts.

Sales overview > Invoices

Invoice Awaiting payment

Preview Add payment

Sent

To

Bayside Club

P O Box 3354

South Mailing Cen

Ridge Heights,

Madeupville MVL

6001

Australia

Reference

Job: J00004

Item / description

Add payment

Date paid

Tue, 16 Apr 2024

Account

Select account

Amount paid

153.20

Reference

Cancel Add

number

50

ending theme

ndard

are tax exclusive

unt

Amount

If you wish to see the payments in Gojee immediately, you can go to [My Account](#) and force sync invoice payments with the Sync Xero Now button.

Taxation

Q: Tax is incorrectly applied/not applied to my invoice when it shouldn't/should be, how can I fix this?

A: The Xero accounts set up for the transaction control whether GST/taxation occurs. For example, in this Xero account there are two sales accounts – one for domestic and one for international sales. Bear in mind that the example is an Australian account, and international accounts will have different terminology for GST exclusivity.

Advanced accounting >

Chart of accounts

Add AccountAdd Bank AccountPrint PDFImportExport

All AccountsAssetsLiabilitiesEquityExpensesRevenueArchive

What's this?

DeleteArchiveChange Tax RateNo accounts selectedSearch

Code	Name	Type	Tax Rate	YTD
090	Business Bank Account	Bank	BAS Excluded	(12,157.99)
091	Business Savings Account	Bank	BAS Excluded	6,878.28
200	Sales Income from any normal business activity	Revenue	GST on Income	20,011.91
201	International Sales Taxless sales	Revenue	BAS Excluded	8,142.63
260	Other Revenue Any other income that does not relate to normal business activities and is not	Other Income	GST on Income	0.00

When the invoice is in Draft stage, you can set up the accounts for each line item on the invoice.

Region

6

Select Region

Income Account

Amount

Please select...

Sales

45.00

X

Please select...

Sales

6,339.65

X

Total Invoice

Includes a d

(Tax Exclud

Interest Income

International Sales

Other Revenue

Sales

When I approve the invoice, one of these line items is using Sales and the other International Sales. This will charge tax on one but not the other, as can be seen here.

Unit Price	Discount %	Tax Amount	Amount (ex. GST)
15.00	-	4.50	45.00
67.20	-	0.00	6,339.65

Total (ex. GST) (AUD):	6,384.65
Includes a discount of 0.00	
Tax (AUD):	4.50
Amount Paid (AUD):	0.00
Amount Due (AUD):	6,389.15

Just make sure the accounts are set up properly in Xero and you'll be able to set or remove tax from each line item.

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