

Knowledge Base

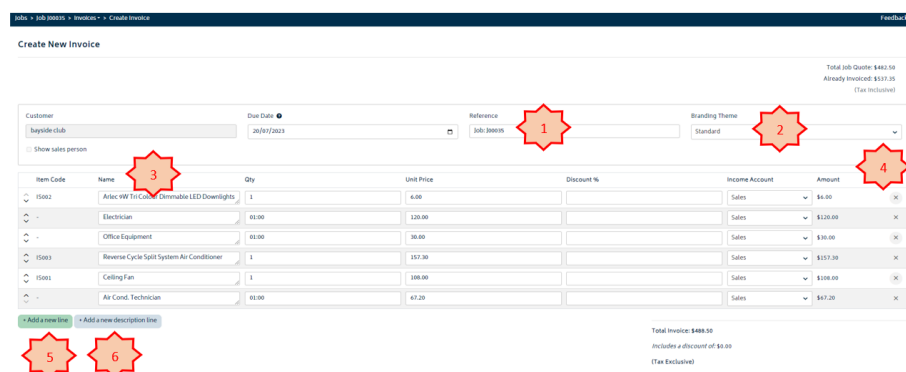


Creating Invoices

To create an invoice, you have two navigation options:

1. Use the [Job Actions](#) button and select Invoices. This will direct you to the job invoice page. Click “New Invoice” from the top right of the job invoice page. You will have two options if you perform it this way:
 - Generate invoice from quote: This will generate an invoice
2. From the dashboard home page, click “Invoices”, then choose “Create New Invoice”, select the job number that you wish to raise an invoice for from the dropdown.

From either method, you will be directed to invoice creation page:



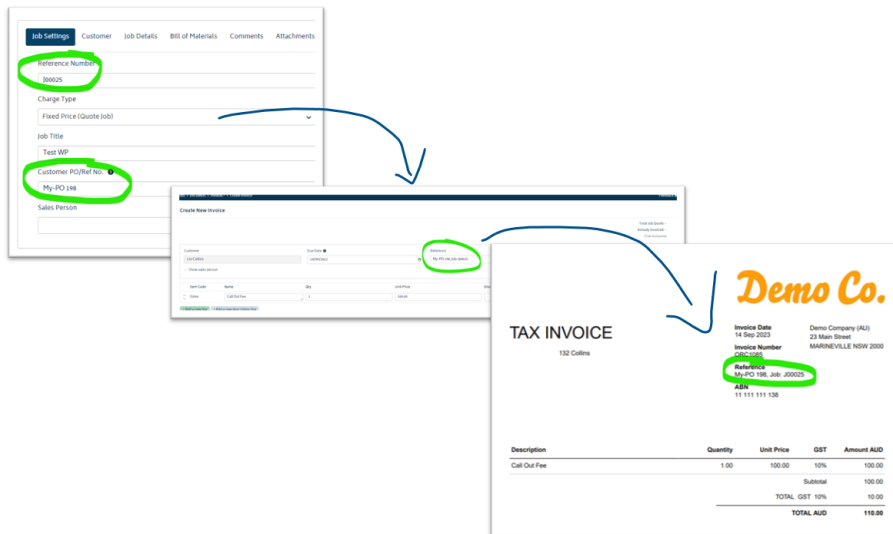
Customer: bayride club | Due Date: 20/07/2021 | Reference: job: 3000 | Branding Theme: Standard

Item Code	Name	Qty	Unit Price	Discount %	Income Account	Amount
15002	Airac V8 Tricolor Removable LED Downlights	1	6.00		Sales	\$6.00
	Electrician	01.00	120.00		Sales	\$120.00
	Office Equipment	01.00	35.00		Sales	\$35.00
15003	Reverse Cycle Split System Air Conditioner	1	157.30		Sales	\$157.30
15001	Ceiling Fan	1	108.00		Sales	\$108.00
	Air Cond. Technician	01.00	67.20		Sales	\$67.20

Total Invoice: \$488.50
Includes discount of \$0.00
(Tax Excluded)

The numbered items from the image above are described below:

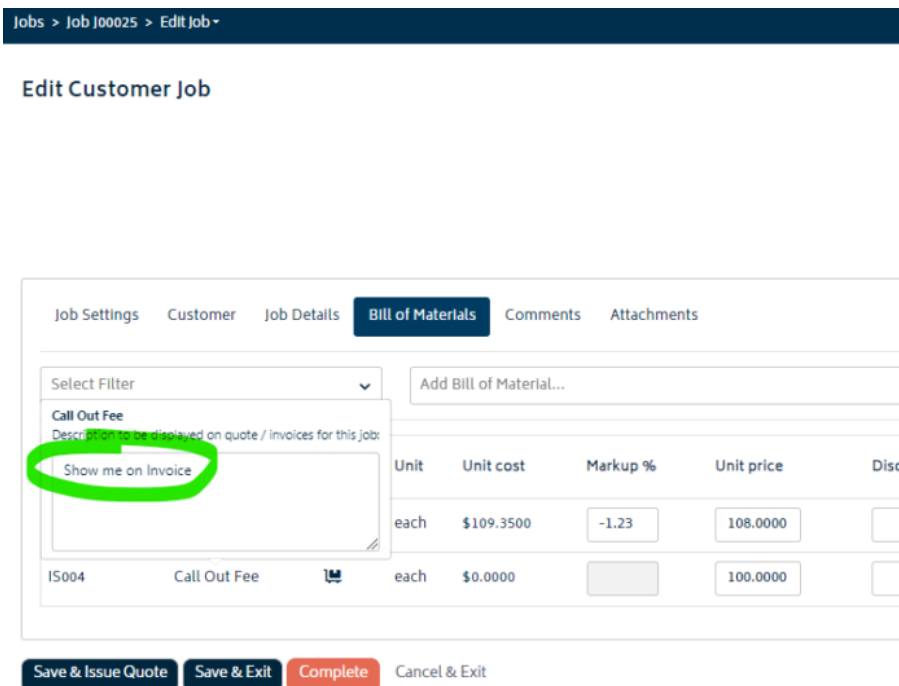
1) This section “Reference” by default combines the job purchase order and job reference number from the Job Settings tab onto this field in the invoice. This is an editable field so you can add or modify this text as required.



2) “Branding Themes” allow you to select the right Xero branding theme for your invoice. To learn about setting up Xero Branding Themes, please visit this [Link](#).

3) The name section that shows for each item on the invoice is driven off the following setting in order:

- - - If a user has made a change to the name of the item on the BOM page, then this will be what is shown on the invoice name section for the item:



Note: To show the popover to edit the name as seen in the above image, simply hover your mouse over the name of the item and the popover will be displayed. Type the name in here you want to show on the

invoice and quote. Move your mouse out of the popover window when done. Be sure to hit the save button at the bottom of the page when finished editing any details of the BOM.

- If no change is made on the BOM page, the the name defaults to the invoice/quote description for item (if it exists):

- Otherwise, the name will default to the name of the item from the catalogue:

Note: the name field on the invoice is editable which means that you can either rename the item or add more information to it. Whatever text you enter for each line item on the invoice creation page in Gojee will be what is displayed on the invoice generated in Xero. Note, changes made to the name on this page will not be propagated back to the catalogue item, or to the BOM page for the job.

4) The (x) icon allows you to remove a line item altogether from an invoice. This will not remove the item from the BOM page, it will simply remove the item off this particular invoice in case you want to create multiple invoices for the job.

5) “Add a new line” allows you to add an entirely new line item that wasn’t part of the actual Bill of Materials while creating a job. This is usually used for cases where you need to show the line item detail in a different format that doesn’t exactly match the BOM page.

6) “Add a new description line” allows you to add an additional text field where you may insert more details about an item or the invoice if you need to. This line will show on the invoice, but it won’t have a

price attached to it.

After the invoice has been prepared, you have the following options to proceed:

- **Approve:** Clicking “Approve” will automatically create a new invoice in the system which will not be editable after creation.
- **Save as Draft:** Allows you to create an invoice with the option to go back into invoice and edit / update information if required.
- **Cancel:** Will not save any of the changes that you made to the invoice and will purge the invoice from the system.

Note: Once the invoice has been Approved, it cannot be edited any longer. This is based off rules on invoicing from Xero. In a case where your business workflow requires users to generate invoices with the ability to edit them at a later stage, please select “Save as a draft invoice” instead of approving the invoice right away.

After clicking “Approve” or “Save as Draft” you will be navigated to invoice page for that particular job.

View Job Invoices

To view the job invoice page, use the [Job Actions](#) button and select Invoices. This will direct you to the job invoice page.

If you have raised one or more invoices for the job, you will be able to see all the invoices and their relevant status as detailed below:

The screenshot shows a table of job invoices. Red star-shaped callouts with numbers 1 through 5 are placed over specific elements: 1 points to the 'PDF Document link' icon, 2 points to the 'Xero Invoice No.' column, 3 points to the 'Email Invoice' button, 4 points to the 'New Invoice' button, and 5 points to the 'Sent' column.

	Invoice Ref.	Status	Total	Paid	Amount Due	Due Date	Sent
1	20005						
2							
3							
4							
5							

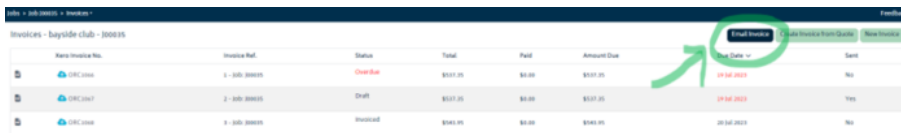
The numbered items in the image above are described below:

1. **PDF Document link:** Click on this to view and download a copy of the invoice in PDF format generated from Xero.
2. **Xero Deep Link:** Click on the Xero Invoice No, which will take you inside Xero to the actual invoice (Note: you will need to login to Xero to access this).
3. **Email Invoice:** Click “Email Invoice” button, and you will be provided an option to email the invoice through Gojee to your customers. See the section below on emailing invoices for more details.
4. **New Invoice:** This button allows you to create a new invoice altogether for a customer.
5. **Invoice Status:** Displays the status whether the invoice has been emailed to a customer.

Email Invoices

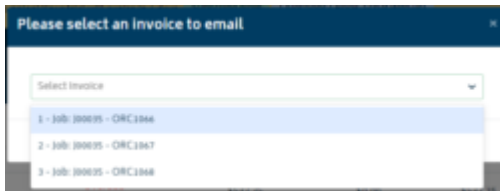
Navigate to the Job Invoice page (as detailed in the section above). From this page you will have the option to email invoices directly to your customers.

To email the invoice, follow these steps:



Key Invoice No.	Invoice Ref.	Status	Total	Paid	Amount Due	Due Date	Sent
1 - Job: 200035 - ORC1066	1 - Job: 200035	Over Due	\$537.35	\$0.00	\$537.35	27 Jan 2023	No
2 - Job: 200035 - ORC1067	2 - Job: 200035	Draft	\$537.35	\$0.00	\$537.35	27 Jan 2023	Yes
3 - Job: 200035 - ORC1068	3 - Job: 200035	Invoice	\$537.35	\$0.00	\$537.35	27 Jan 2023	No

- Click on the email button
- Choose the document you'd like to send from the dropdown list:

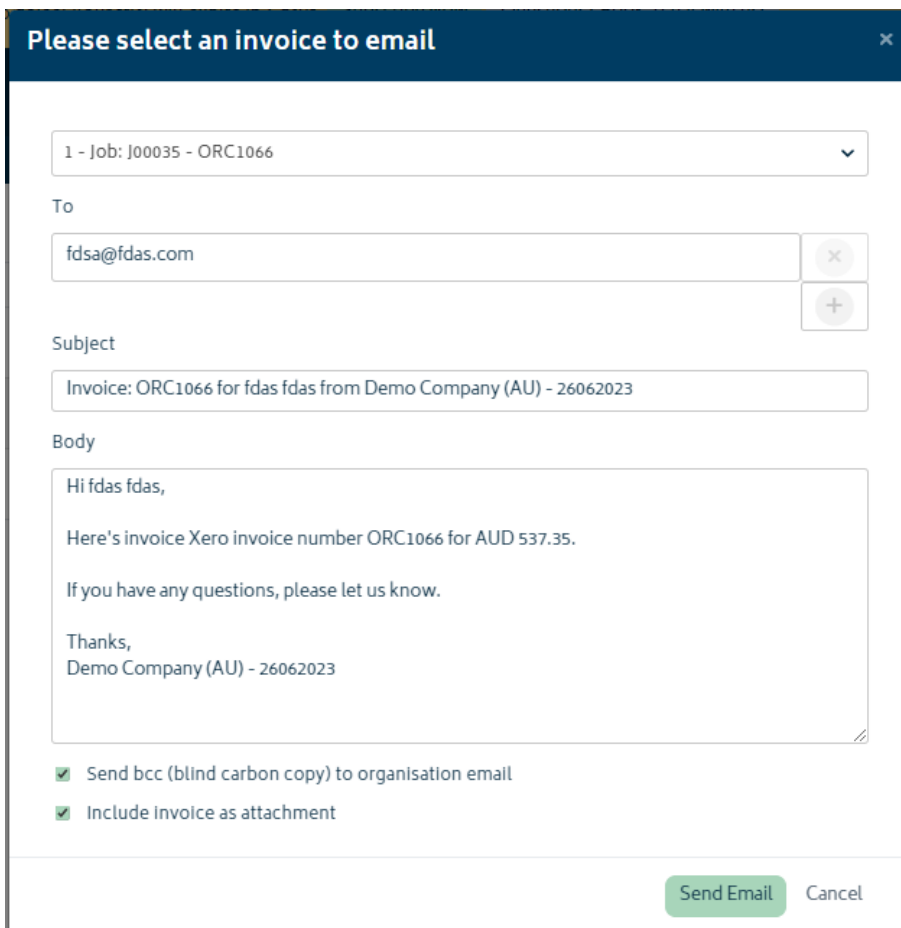


Please select an invoice to email

Select Invoice

- 1 - Job: 200035 - ORC1066
- 2 - Job: 200035 - ORC1067
- 3 - Job: 200035 - ORC1068

- You'll be presented with the following modal:



Please select an invoice to email

1 - Job: J00035 - ORC1066

To

fdsa@fdas.com

Subject

Invoice: ORC1066 for fdas fdas from Demo Company (AU) - 26062023

Body

Hi fdas fdas,

Here's invoice Xero invoice number ORC1066 for AUD 537.35.

If you have any questions, please let us know.

Thanks,
Demo Company (AU) - 26062023

☒ Send bcc (blind carbon copy) to organisation email

☒ Include Invoice as attachment

Send Email Cancel

- - The Email will default to the customers email as set up in the [customers](#) section. A new email can be added, or the email can be changed.
 - The Subject will default to the dynamic text as shown, including the job number, the quote reference and the users (senders) organisation name
 - The Body will default to the dynamic text as shown, including the quote reference and the price.
 - Options to bcc the organisation email and include the quote as attachments are provided.

- To send the email, hit the Send Email button.
- Once the invoice has been sent, the “Sent” field for the document on the job invoice list page will show as sent (if this status doesn’t show immediately, simply refresh the page):

Sent

No

Yes

No

View all Invoices for all Jobs

From the dashboard home page, click “Invoices”, then choose “View All Invoices”. This will direct you to the Reports > Invoices page:

Item Invoice Ref	Invoice Ref	Job	Customer	Sales Person	Status	Total	Paid	Amount Due	Due Date
1 - 1480-300010	1 - 1480-300010	000010	Test name	-	Overdue	\$75.00	\$0.00	\$75.00	25-Aug-2023
2 - 1480-300010	2 - 1480-300010	000010	Bayville Club	Jimmy Oliver	Overdue	\$750.00	\$0.00	\$750.00	25-Aug-2023
3 - 1480-300010	3 - 1480-300010	000004	7-Eleven	-	Overdue	\$479.75	\$0.00	\$479.75	25-Aug-2023
4 - 1480-300010	4 - 1480-300010	000017	Abby & Wills	-	Overdue	\$239.00	\$0.00	\$239.00	25-Aug-2023
5 - 1480-300010	5 - 1480-300010	000011	City Limousines	Jimmy Oliver	Overdue	\$440.00	\$0.00	\$440.00	25-Aug-2023
6 - 1480-300010	6 - 1480-300010	000012	Bayville Club	Jimmy Oliver	Overdue	\$440.00	\$0.00	\$440.00	25-Aug-2023
7 - 1480-300010	7 - 1480-300010	000010	7-Eleven	-	Overdue	\$238.00	\$0.00	\$238.00	25-Sep-2023
8 - 1480-300010	8 - 1480-300010	000018	7-Eleven	-	Overdue	\$9.75	\$0.00	\$9.75	25-Sep-2023
9 - 1480-300010	9 - 1480-300010	000011	7-Eleven	-	Overdue	\$235.40	\$0.00	\$235.40	25-Sep-2023

- You can toggle between different status(es) to view invoices in different stages in Xero. To view all the invoice at one go, you may select ALL. You can also type in job reference number, customer’s name or the invoice number itself in the search bar to search a particular invoice after clicking ALL.
- To edit any invoice, or to take a payment against it from within Gojee, simply click on the row in this table and the Invoice Edit page will open.

Next: [Edit Gojee Invoices](#).