

## FAQ: Creating an Invoice in EServ Field App

### Purpose:

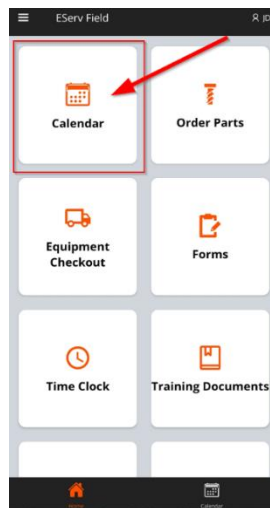
This guide explains how to build, send, and pay Invoices using the EServ Field application.

## Steps to Create an Invoice

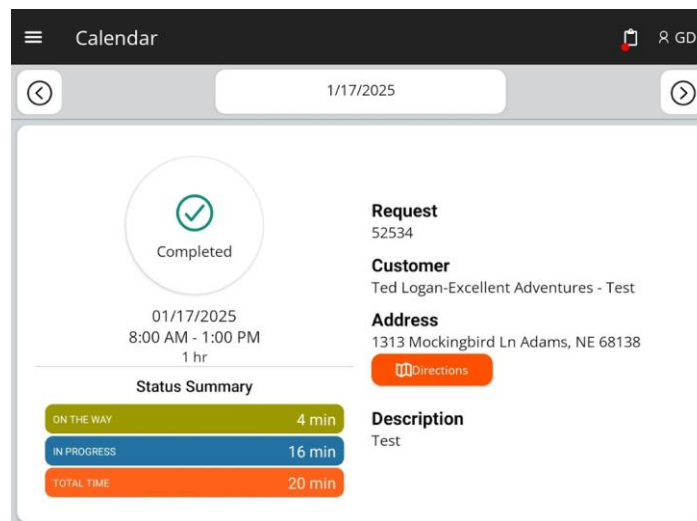
### Locate the Appointment

#### 1. Access Assigned Appointments:

- Tap the **Calendar** icon at the top-left corner of the screen (Fig. 1-2).

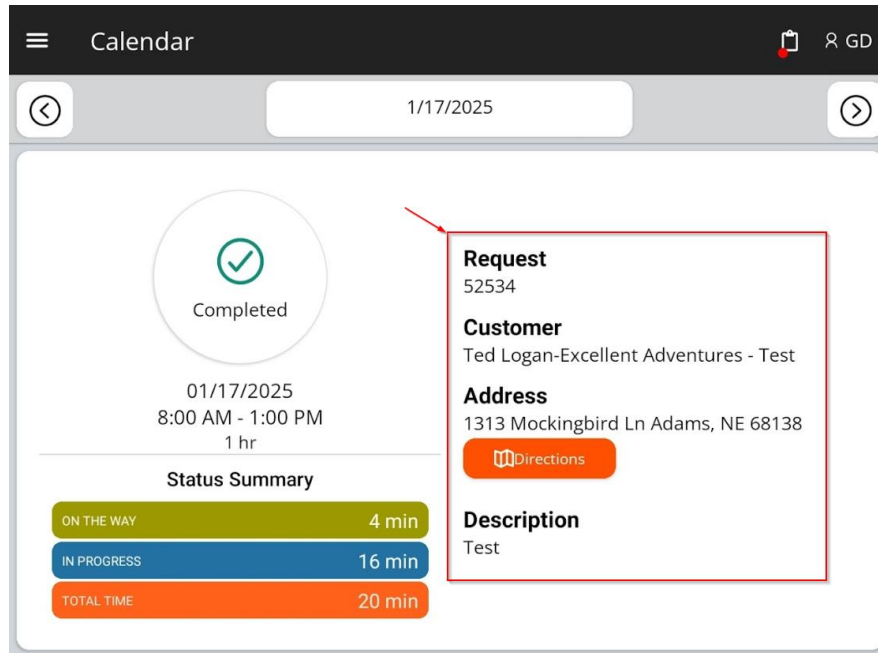


- This displays all appointments assigned to you for the current day (Fig. 1-3).



## 2. Open the Completed Appointment:

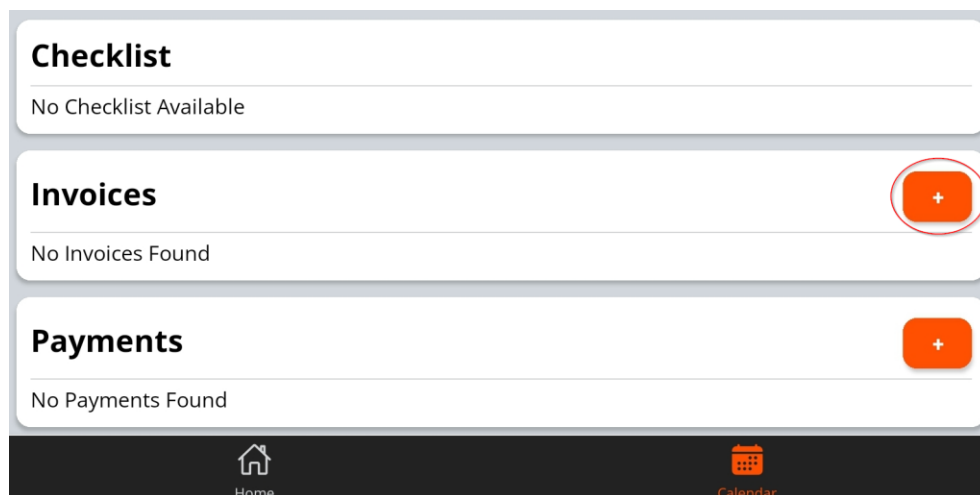
- Tap on the customer information area (Fig. 1-4).



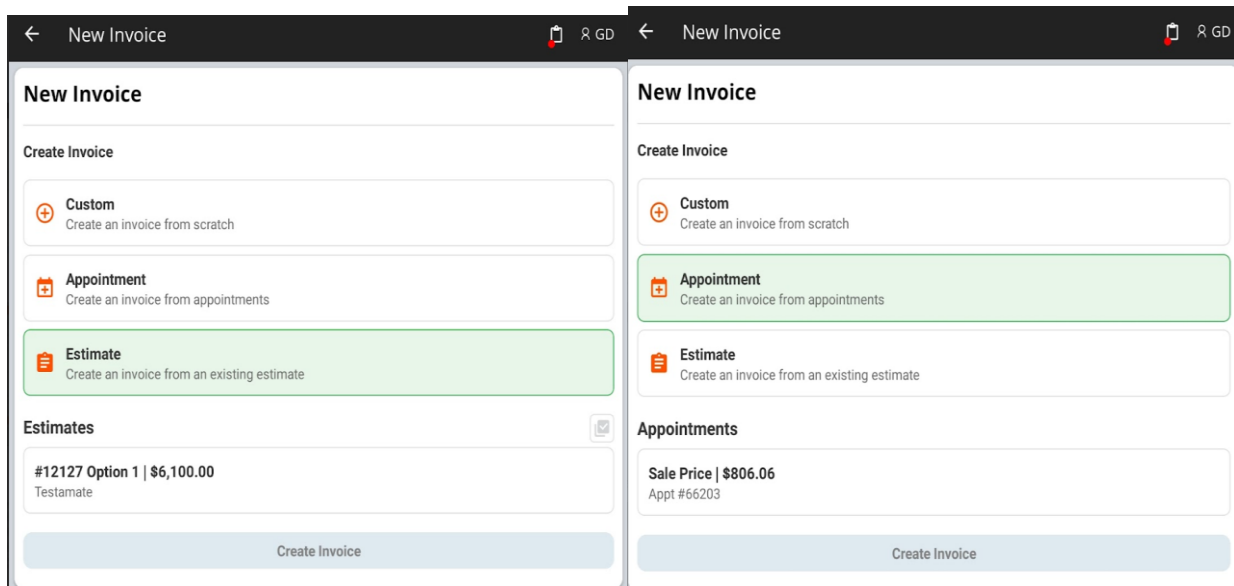
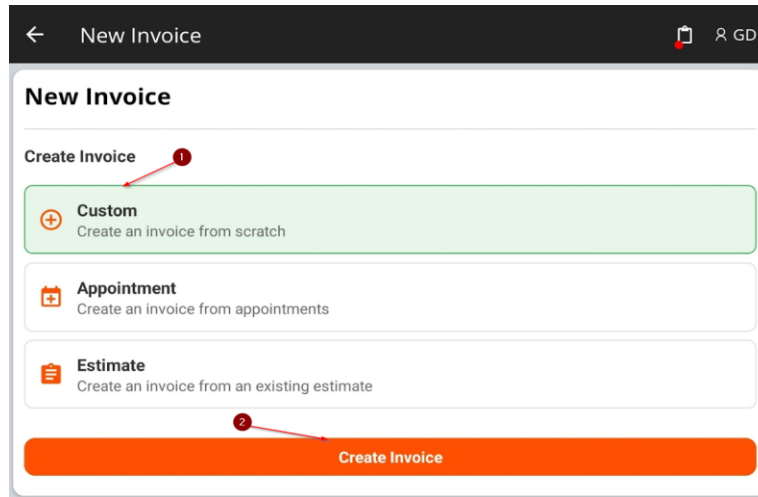
## 2. Build the Invoice

### 1. Begin a New Invoice:

- At the bottom of the **Appointment Details** page, tap the **Plus** button in the **Invoices** section (Fig. 2-1).



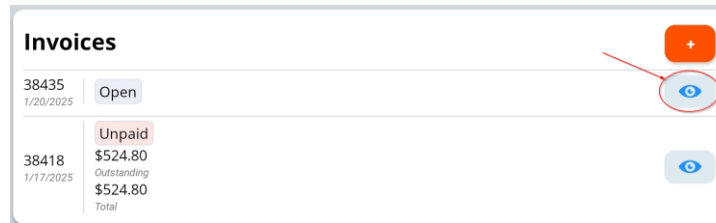
- On the **New Invoice** page, select a method to create the invoice (e.g., Custom, Appointment, Estimate) For this guide we will be using the 'Custom' type (Fig. 2-2).



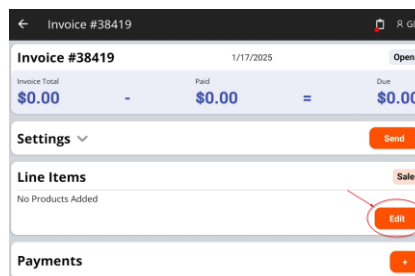
- Choosing from an **Estimate** will pull any line items associated with that appointment made in an **Estimate**. (see How-to 1.5a Creating an Estimate in App)
- Choosing the **Appointment** option will automatically pull any Line items associated with the chosen **Appointment**. Therefor removing the need to search up items.
- Tap **Create** to generate the new invoice and automatically open your **New Invoice** (Fig. 2-3).

## 2. Edit the Draft Invoice:

- If you leave the menu for any reason, you can still access your new invoice from the Request Details page.
- Scroll to the bottom of the Request and tap on the View icon on the **Appointment Details** page to view your invoice. (Fig. 2-4).

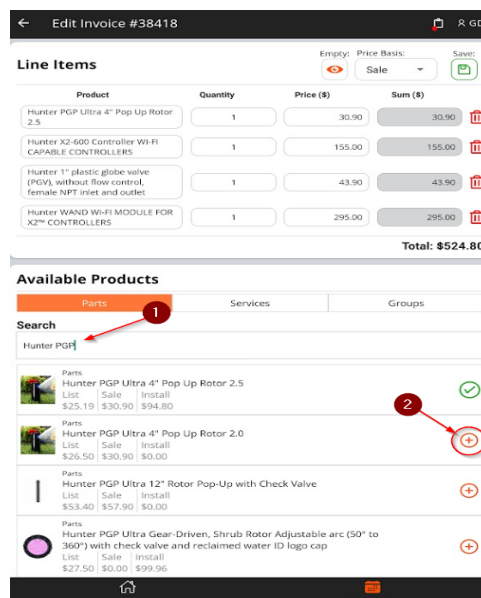


- Back on the **Invoice** page, tap the **Edit** button in the **Line Items** section (Fig. 2-5).



## 3. Add / edit Line Items to the Invoice:

- Use the search block to find items or scroll through the list.



- Tap the + icon next to each item to add it to the invoice (Fig. 2-6).

### 3. Save and Send the Invoice

#### 1. Save the Invoice:

- Once all required items are added, tap the **Save** icon in the top-right corner of the screen (Fig. 3-1).

← Edit Invoice #38418

Empty: Price Basis: Save: (circled in red)

Product	Quantity	Price (\$)	Sum (\$)
Hunter PGP Ultra 4" Pop Up Rotor 2.5	1	30.90	30.90
Hunter X2-600 Controller WI-FI CAPABLE CONTROLLERS	1	155.00	155.00
Hunter 1" plastic globe valve (PGV), without flow control, female NPT inlet and outlet	1	43.90	43.90
Hunter WAND WI-FI MODULE FOR X2™ CONTROLLERS	1	295.00	295.00

Total: \$524.80

#### 2. Adding Taxes, Discounts, and Fees to the Invoice.

- To apply Tax use the Drop down arrow next to the Settings.

Invoice #38418 1/17/2025 Open

Invoice Total	Paid	Due
\$524.80	\$0.00	\$524.80

Settings (1) Edit Tax/Discount/Fees (2)

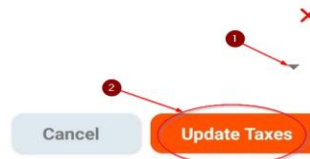
Customer Can Pay Online Allow Card Allow ACH

- From there select Edit Tax/Discount/Fees.
- You can then select any applicable Taxes, Discounts, or Fees to your Invoice.

## Edit Taxes

NE Sales Tax

Select Tax



- After making your selection, Click **Update Taxes**.

### 3. Send the Invoice:

- On the **Invoice** page:
  - Click the Send button on the right side of the screen.

- You can select as many customer email addresses you would like to send them to, as well as add any new ones.
- Select the appropriate invoice template (e.g., Residential, Remodel, Commercial).

**Send Invoice**

To

bogus@journey.com ✕ 1

facethemusic@adventure.com ✕

Add an email

**Custom Documents Template** 2

Standard Terms

Invoice (Sample)

**Billing Address**

☒ 123 Circle K Way, Preston NE, 68138

☐ 1313 Mockingbird Ln, Adams NE, 68138

☐ 123 Circle K Way, Omaha NE, 68008

☐ 123 Circle K Way, Preston NE, 68138, Preston NE, 68138

**Completion Notes**

Include Headers ☒

Black & White Print ☐

3

Cancel Preview **Send Invoice**

- Tap **Send** to email the invoice to the customer (Fig. 3-2).

**Note:** The **Send** button will only activate if:

- A valid email address is selected.
- An invoice template is chosen.

#### 4. Await Customer Response:

- After sending, the invoice status will show as **Unpaid** on the **Appointment Details**, and **Invoice** page (Fig. 3-3).

Invoice #38418		1/17/2025		Unpaid	
Invoice Total		Paid		Due	
\$524.80	-	\$0.00	=	\$524.80	

- Once the customer pays and completes the invoice, the status changes to **Invoice Paid**.

Invoice #38418		1/17/2025		Paid	
Invoice Total		Paid		Due	
\$524.80	-	\$524.80	=	\$0.00	