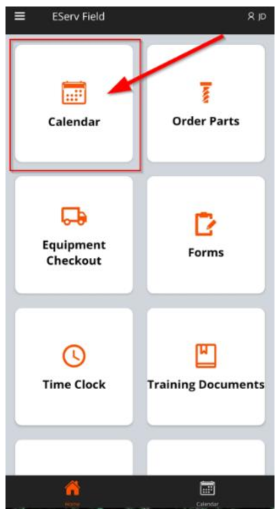
FAQ: Creating an Invoice in EServ Field App

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

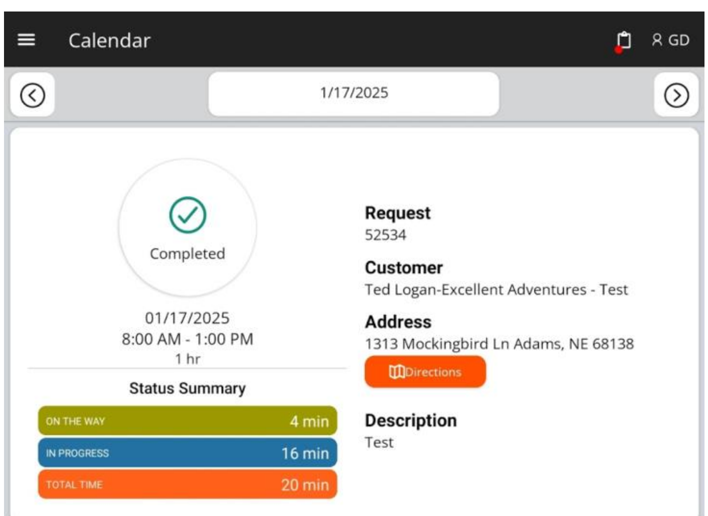
Steps to Create an Invoice

Locate the Appointment

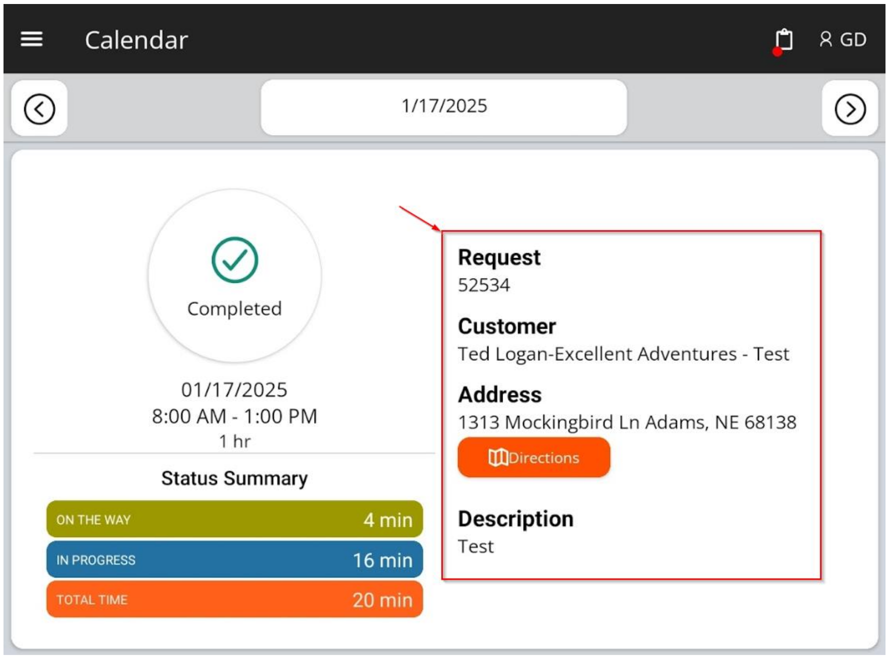
1. **Access Assigned Appointments:**
    - Tap the **Calendar** icon at the top-left corner of the screen (Fig. 1-2).



    - 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).



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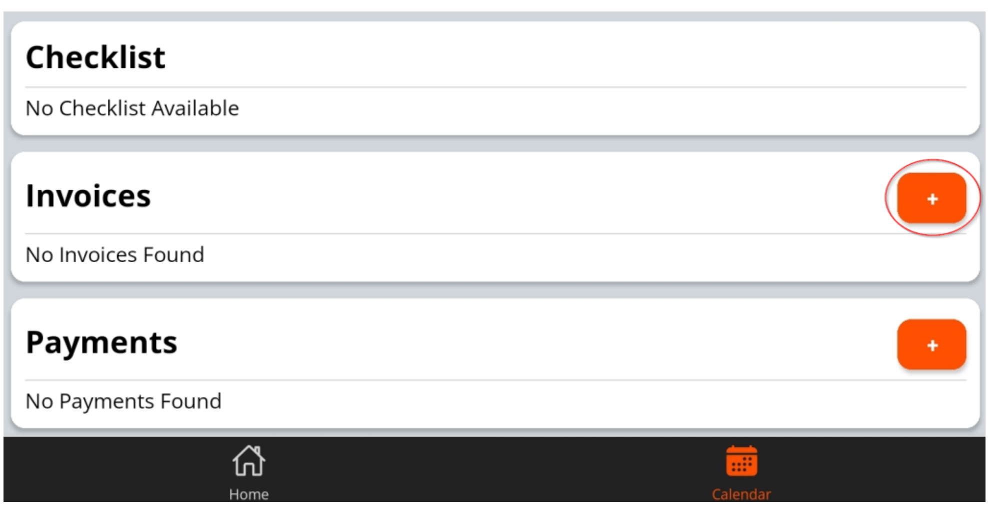
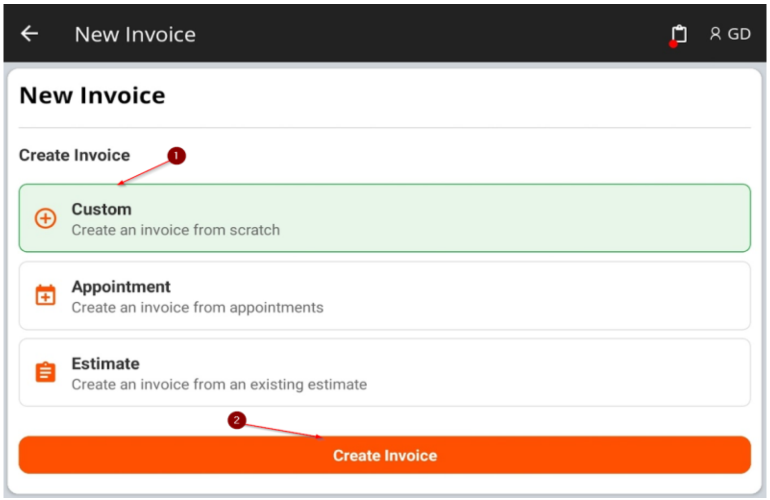
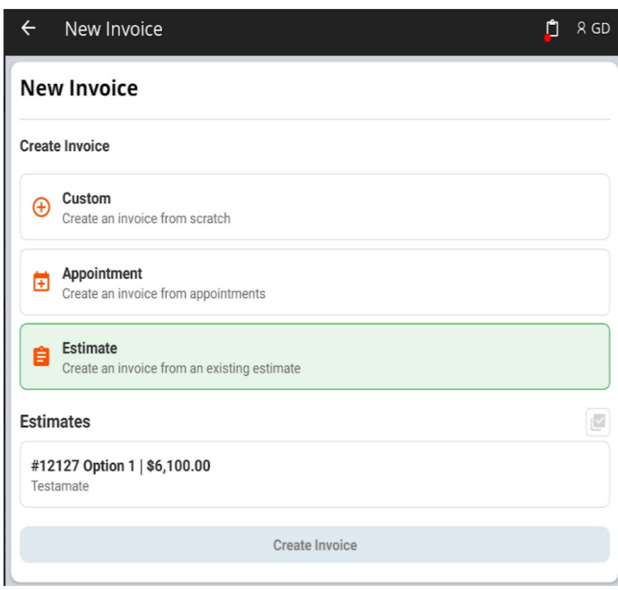
2. Build the Invoice

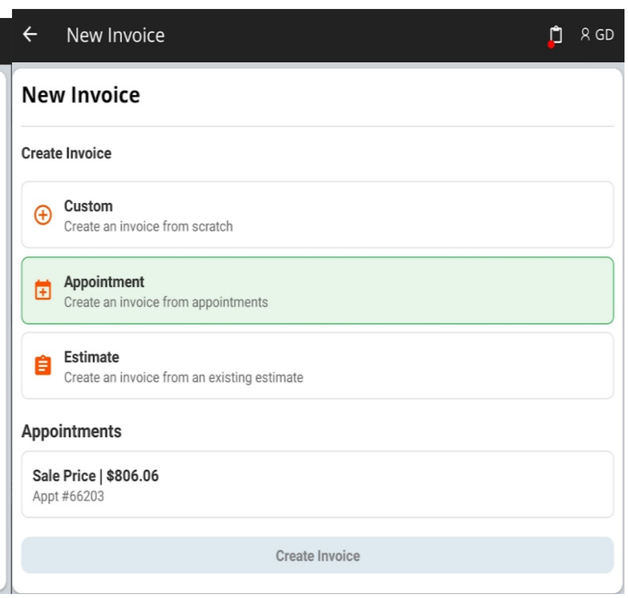
1. **Begin a New Invoice:**
    - At the bottom of the **Appointment Details** page, tap the **Plus** button in the **Invoices** section (Fig. 2-1).



- 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).



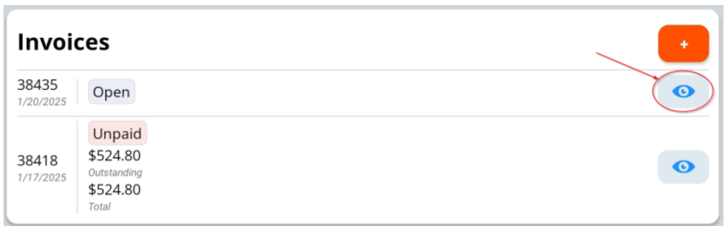




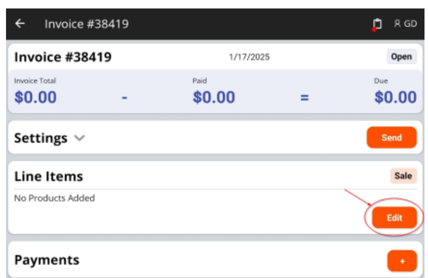
- Choosing from an **Estimate** will pull any line items associated with that appointment made in an **Estimate**. (see How-to 1.5a Creating an Estimate in App)
- Choosing the **Appointment** option will automatically pull any Line items associated with the chosen **Appointment**. Therefor removing the 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).

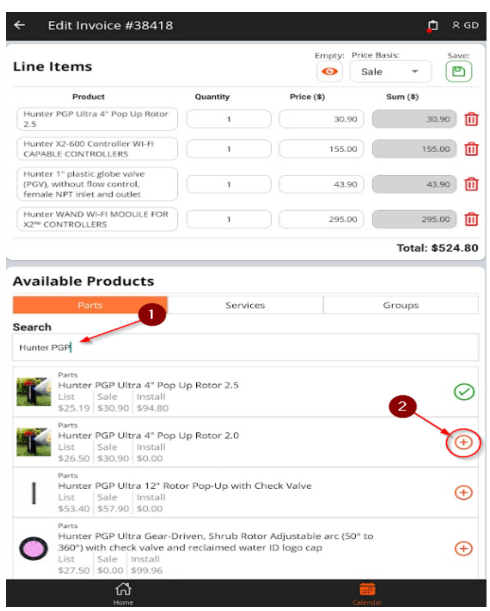


   - Back on the **Invoice** page, tap the **Edit** button in the **Line Items** section (Fig. 2-5).



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).

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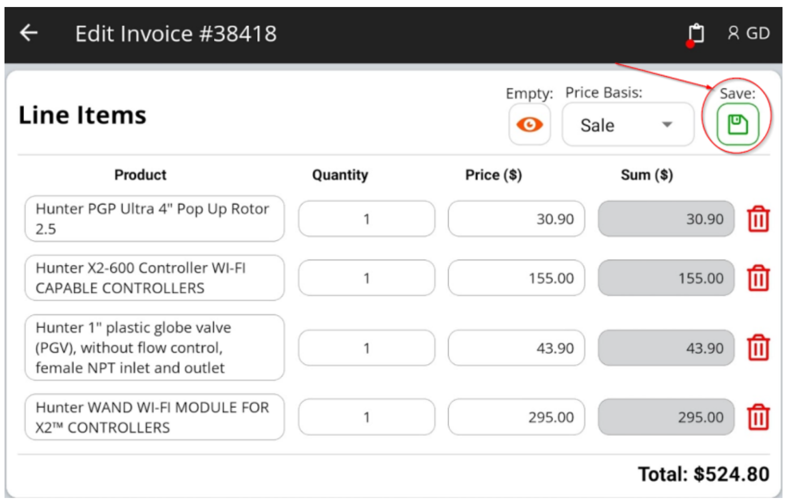
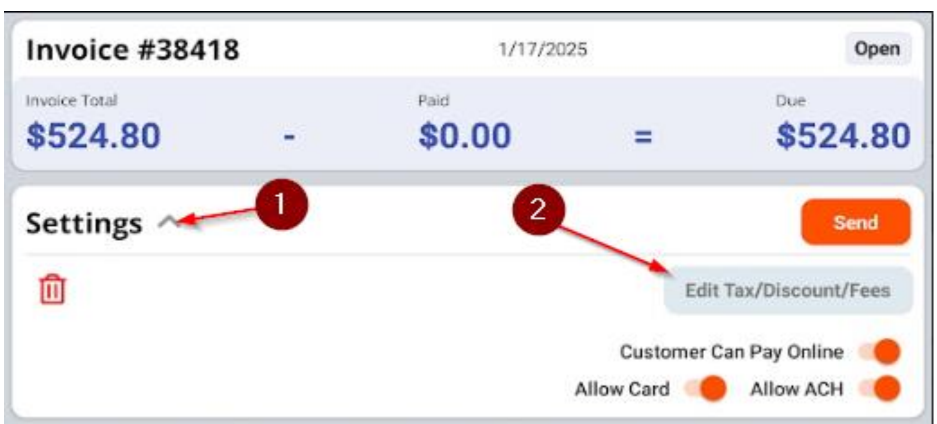
3. Save and Send the Invoice

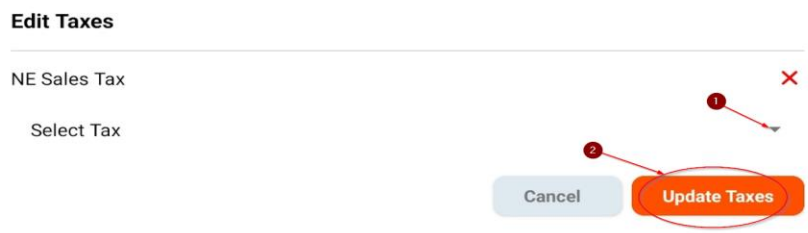
1. **Save the Invoice:**
   - Once all required items are added, tap the **Save** icon in the top-right corner of the screen (Fig. 3-1).



2. Adding Taxes, Discounts, and Fees to the Invoice.
   - To apply Tax use the Drop down arrow next to the Settings.

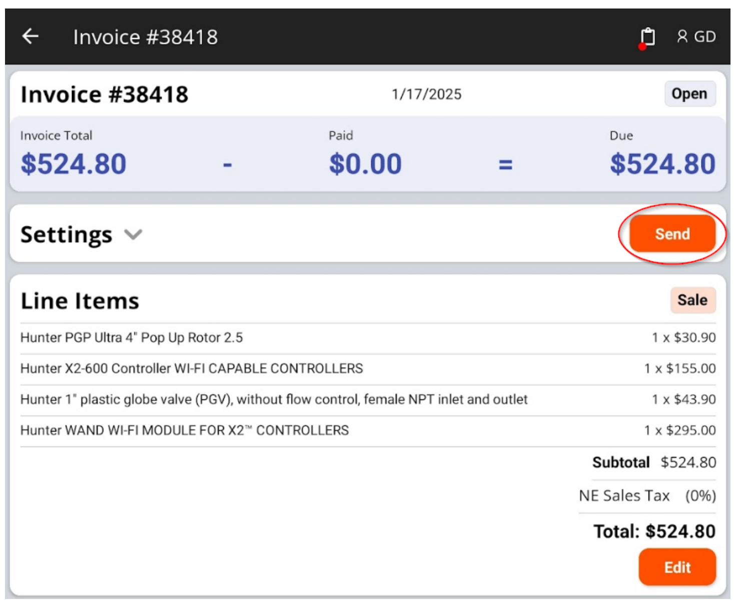


   - From there select Edit Tax/Discount/Fees.
     - You can then select any applicable Taxes, Discounts, or Fees to your Invoice.

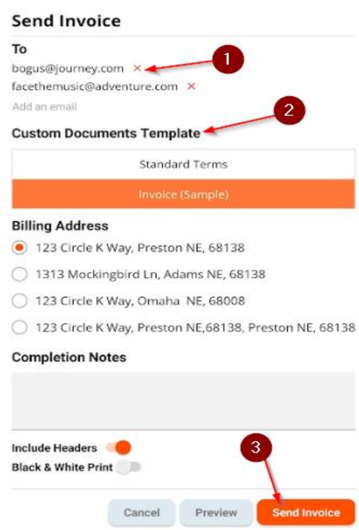


- After making your selection, Click **Update Taxes.**

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).



- 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).

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