

Invoice & Payment

User Guide

Create invoices from completed jobs, add payment links, mark invoices as paid, and track the full payment lifecycle.

Quick Reference

Access: Managers and admins

Flow: Estimate → Job → Invoice → Payment

Payment links: Add any URL for client payment

Notifications: Clients notified on invoice creation and payment

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1. Overview

Invoice Management closes the loop from estimate to payment. After completing an estimate-linked job, convert it into a professional invoice. Add a payment link so clients can pay online. Track payment status throughout.

Clients receive automatic notifications when invoices are created and when payments are recorded.

2. Creating an Invoice

Invoices are created from completed estimate-linked jobs. The invoice pulls in the actual labor hours, materials used, and pricing from the estimate.

- Navigate to a completed job in the portal
- Click Create Invoice
- Review the pre-filled details (labor, materials, total)
- Add or adjust line items if needed
- Save to generate the invoice

Note: Invoices inherit your company branding (logo, name, colors) from your subscription settings.

3. Payment Links

Add a payment link to any invoice so clients can pay online. This can be a Stripe link, PayPal, Venmo, or any URL where clients can submit payment.

The payment link appears on the invoice when viewed by the client in their portal. One click takes them directly to payment.

Tip: Use a consistent payment processor so clients recognize the payment page. Include your company name in the payment description.

4. Marking as Paid

When payment is received, mark the invoice as paid with one click. This:

- Updates the invoice status to Paid
- Sends a confirmation notification to the client
- Adds the amount to your revenue dashboard totals
- Moves the estimate through the pipeline to "Paid"

5. Quick Reference

Create invoice	Portal > Job > Create Invoice
Add payment link	Invoice > Add Payment Link
Mark as paid	Invoice > Mark Paid
View all invoices	Manager Portal > Invoices