

How to Create a Manual Invoice

19 Steps [View most recent version](#) 

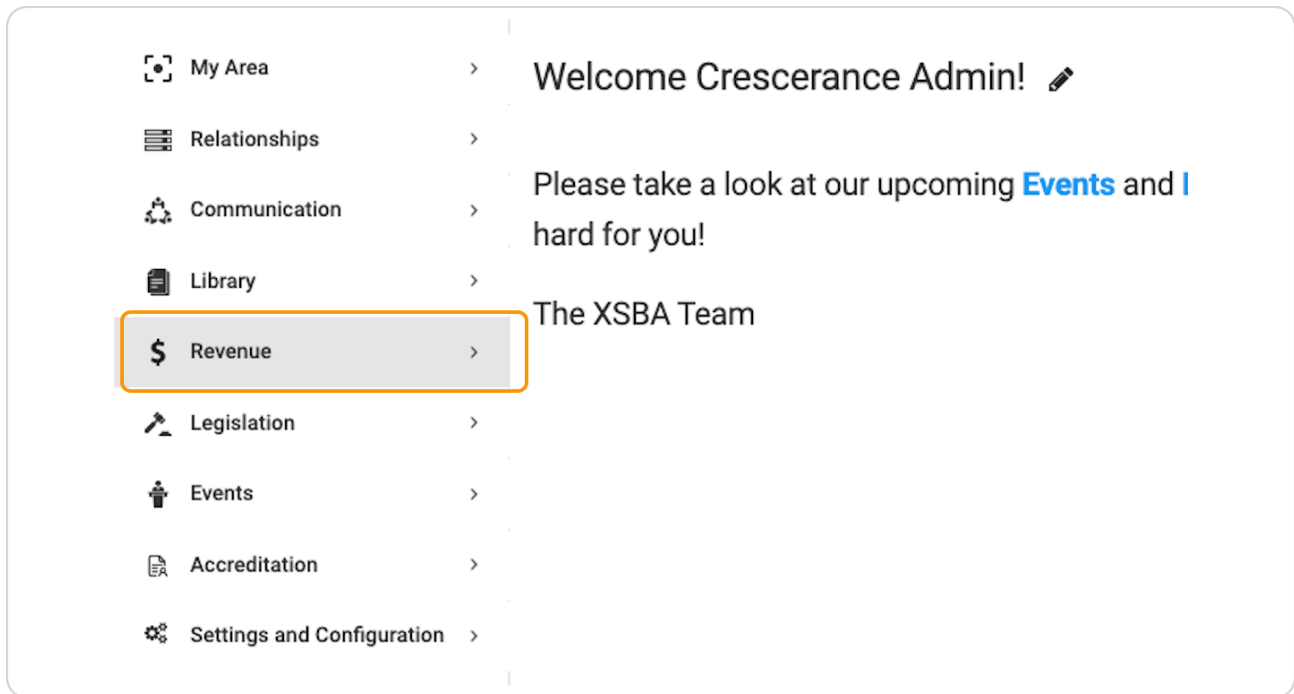
Created by
Engagifii Inc.

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Last Updated
November 17, 2023

STEP 1

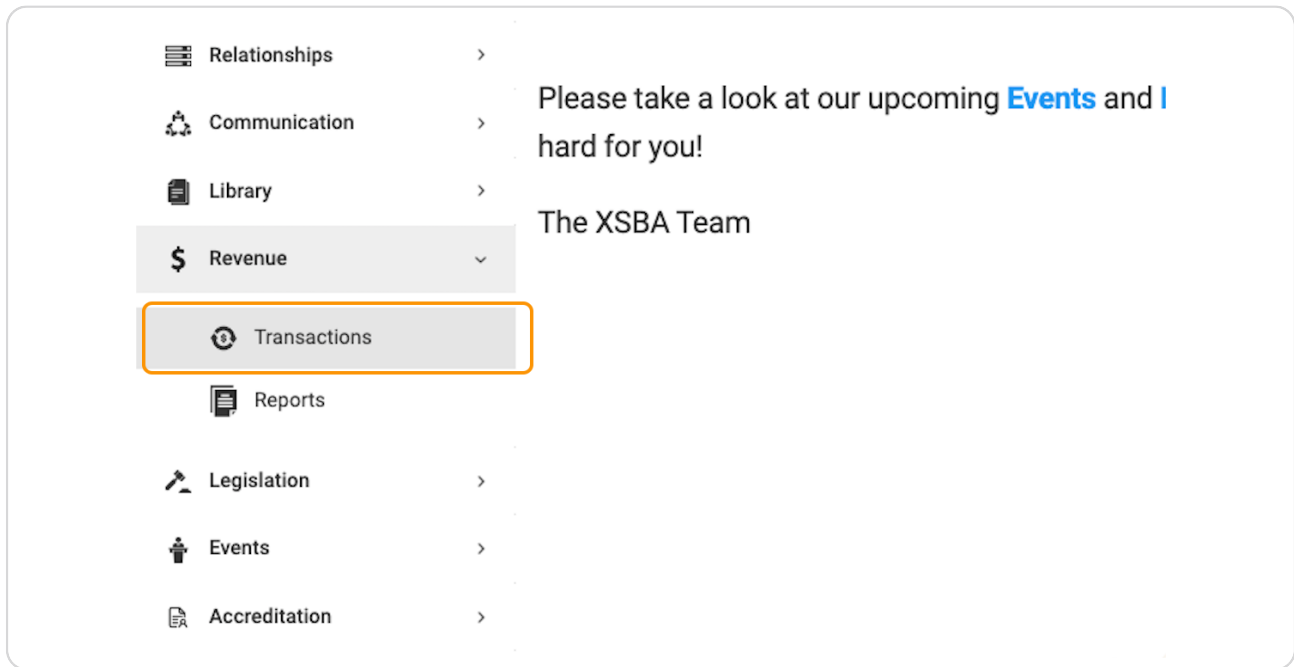
Click on Revenue



The screenshot displays a dashboard interface. On the left is a vertical navigation menu with the following items: 'My Area', 'Relationships', 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', 'Accreditation', and 'Settings and Configuration'. Each item has a small icon to its left and a right-pointing chevron. The 'Revenue' item, which features a dollar sign icon, is highlighted with a light gray background and an orange border. To the right of the menu is the main content area. It begins with a welcome message: 'Welcome Crescerance Admin!' followed by an edit icon. Below this is a paragraph: 'Please take a look at our upcoming **Events** and I hard for you!'. At the bottom of the main content area, it says 'The XSBA Team'.

STEP 2

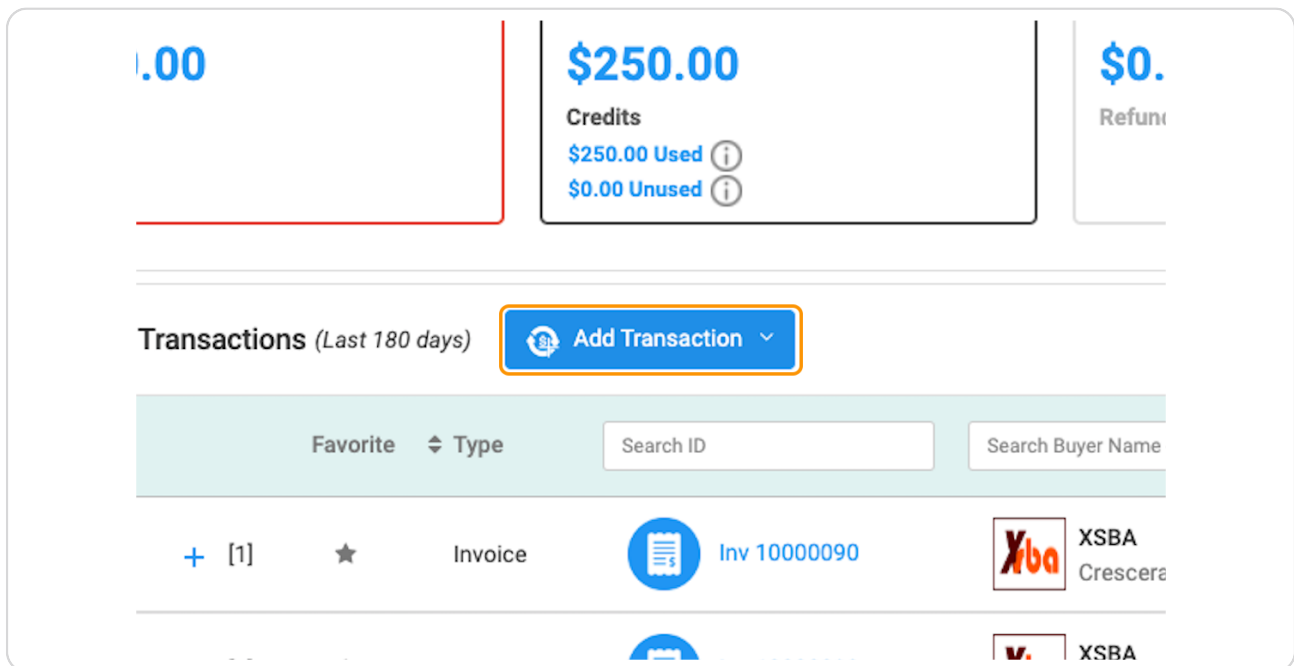
Click on Transactions



A screenshot of a navigation menu. The menu items are: Relationships, Communication, Library, Revenue, Transactions, Reports, Legislation, Events, and Accreditation. The 'Transactions' item is highlighted with an orange border. To the right of the menu, there is a message: "Please take a look at our upcoming **Events** and **Legislation** and thank you so hard for you!" followed by "The XSBA Team".

STEP 3

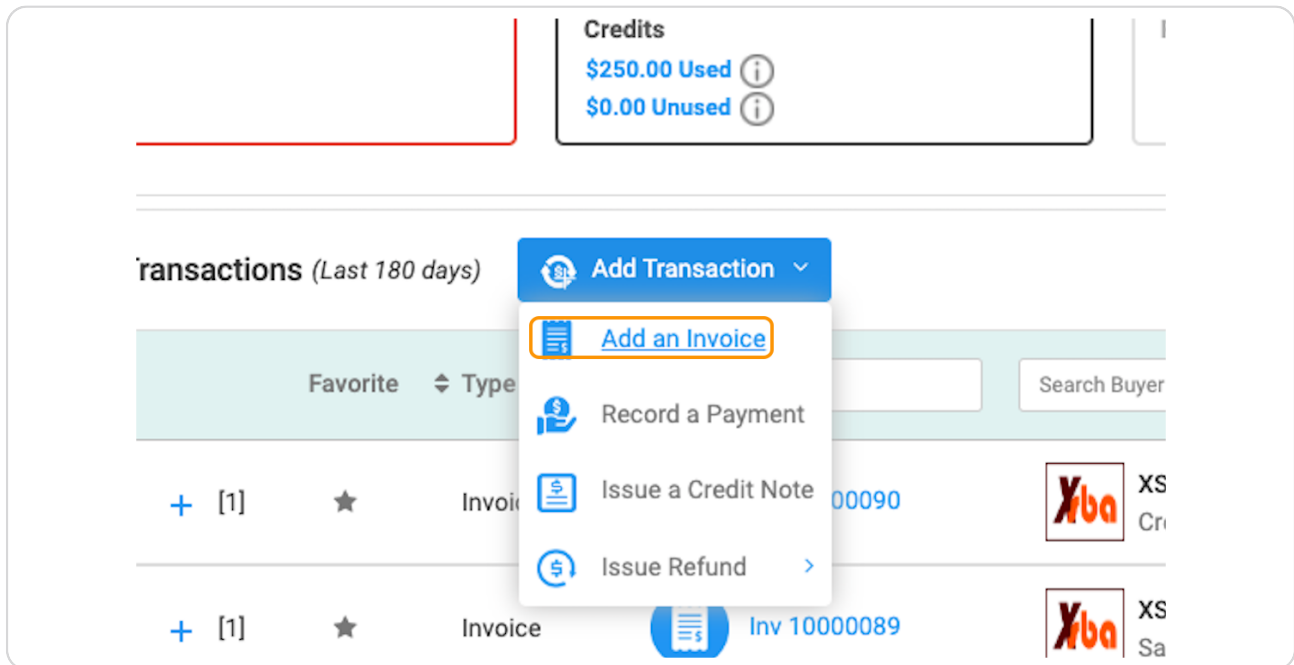
Click on Add Transaction



A screenshot of a transactions dashboard. At the top, there are three summary boxes: a red box with "\$1.00", a black box with "\$250.00 Credits" (subdivided into "\$250.00 Used" and "\$0.00 Unused"), and a grey box with "\$0.00 Refunds". Below these is a section titled "Transactions (Last 180 days)" with a blue "Add Transaction" button highlighted. Underneath is a filter bar with "Favorite" and "Type" dropdowns, and search fields for "Search ID" and "Search Buyer Name". A table below shows one transaction: an "Invoice" for "Inv 1000090" with a plus sign, a star, and a logo for "Xiba XSBA Crescera".

STEP 4

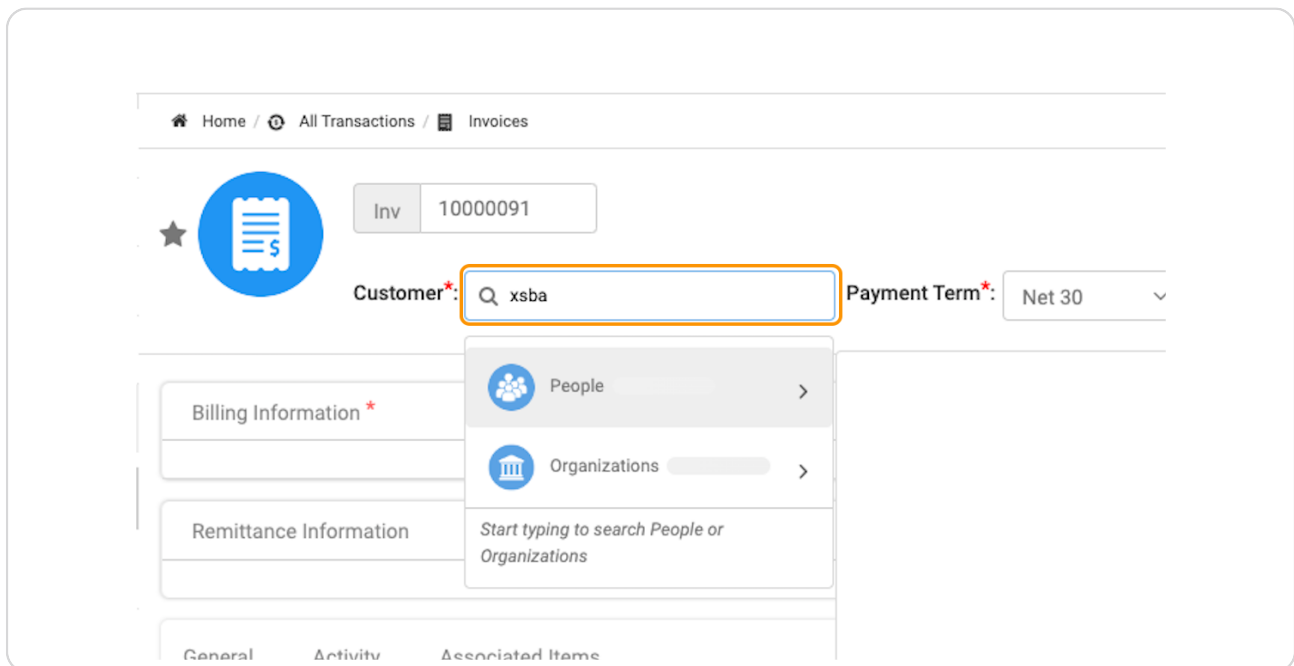
Click on Add an Invoice



The screenshot shows a user interface for managing transactions. At the top right, there is a 'Credits' summary box with two items: '\$250.00 Used' and '\$0.00 Unused', each with an information icon. Below this is a table of transactions for the last 180 days. A dropdown menu is open over the table, titled 'Add Transaction'. The menu items are: 'Add an Invoice' (highlighted with an orange box), 'Record a Payment', 'Issue a Credit Note', and 'Issue Refund'. The table shows two invoice entries, each with a plus sign, a star, the word 'Invoice', and a document icon. The first entry has the number '00090' and the second has 'Inv 1000089'. Both entries feature the 'Xba' logo and the text 'XS Cri' and 'XS Sa'.

STEP 5

Search Organization



The screenshot displays the 'Invoices' page for a specific invoice with ID '1000091'. The breadcrumb navigation at the top reads 'Home / All Transactions / Invoices'. The main header includes a star icon, a document icon with a dollar sign, and the invoice number 'Inv 1000091'. Below this, there is a 'Customer*' search field containing 'xsba' and a 'Payment Term*' dropdown set to 'Net 30'. A dropdown menu is open from the search field, showing options for 'People' and 'Organizations', with a search prompt: 'Start typing to search People or Organizations'. The page layout includes sections for 'Billing Information*', 'Remittance Information', and a bottom navigation bar with 'General', 'Activity', and 'Associated Items' tabs.

STEP 6

Click on organization

The screenshot shows a search interface with a text input containing 'ba'. To the right, a 'Payment Term*' dropdown is set to 'Net 30'. Below the input, a dropdown menu is open, showing 'People (16 Records)' and 'Organizations (1 Record)'. The 'Organizations' option is selected, and a search results list is displayed with one entry: 'Xba XSBA', which is highlighted with an orange border. Below the list, there is a prompt: 'Start typing to search People or Organizations'.

STEP 7

Click on Customer*: ...

The screenshot shows an invoice form in a web application. At the top right, the user is identified as 'Crescance Admin'. The breadcrumb trail is 'Home / All Transactions / Invoices'. The invoice number 'Inv 10000091' is displayed. The 'Customer*' dropdown is set to 'XSBA' and is highlighted with an orange border. The 'Payment Term*' dropdown is set to 'Net 30'. A 'Create & Send' button is visible. Below the customer selection, a 'Requested By*' dropdown is open, showing 'People (16 Records)' and 'Organizations (1 Record)'. The 'Organizations' option is selected, and a search results list is displayed with one entry: 'XSBA', which is highlighted with a green checkmark. Below the list, there is a prompt: 'Start typing to search People or Organizations'. The 'Billing Information*' section is expanded, showing the following details:
Email: info@xamplesba.org
Address (Not the correct address? Change): 600 Galleria Parkway, Atlanta, GA, USA
Galleria Parkway
Atlanta, Georgia 30339
United States
Below the address, there is a table for 'Billing Contact(s)' with the following data:

| Name | Position | Department | Email | Phone |
|--|-----------------|------------|---------------------------|-------|
| <input type="checkbox"/> Alex Administrator-XSBA | Board Secretary | | alexadminxsba@yopmail.com | |

A '+ Add Billing Contact' button is located to the right of the table. The 'Business Information' section is partially visible at the bottom.

STEP 8

Search the Organization's Contact

Home / All Transactions / Invoices

Inv 10000091

Customer*: XSBA Payment Term*: Net 30

Requested By*: sarah

Billing Information *

People

Start typing to search for People

Email
info@xamplesba.org

Address (Not the correct address? [Change](#))

STEP 9

Search the Organization's Contact

Home / All Transactions / Invoices

Inv 10000091

Customer*: XSBA Payment Term*: Net 30

Requested By*: SARAH ANDERSON

People (1 Record)

Start typing to search for People

SARAH ANDERSON
sarahxsba@yopmail.com

1 Record

Address (Not the correct address? [Change](#))
600 Galleria Parkway, Atlanta, GA, USA
Galleria Parkway
Atlanta, Georgia 30339
United States

Billing Contact(s)

| Name | Position | Department | Email |
|------|----------|------------|-------|
|------|----------|------------|-------|


[Add Bi](#)

STEP 10

Select Billing Contact

United States

Billing Contact(s)

| Name |
|---|
| <input checked="" type="checkbox"/>  Alex Administrator-XSBA |

Remittance Information

Email

STEP 11

Enter the Individual the invoice is on behalf of

General Activity Associated Items

Invoice Date and Time* Pu

Nov 17, 2023 14 : 08 PM

| # | Who is this for? | Name |
|---|------------------|------|
| | Tara | |

People



Start typing to search for People

Memo


Paragraph

STEP 12


Enter the Individual the invoice is on behalf of



23  14 : 08 PM 

| is this for? | Name | Category | Description |
|----------------------|----------------------|----------|-------------|
| <input type="text"/> | <input type="text"/> | | |

People (1 Record)  1 Record

Typing to search for People

 **TARA BANKS**
tarabanks@yopmail.com



Paragraph  



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STEP 13




Type in the Event or Item Title

End Time* Purchase Order Number

 14 : 08 PM 

| is this for? | Name | Category | Description |
|--|----------------------|----------|-------------|
|  TARA BANKS  | Principal Leadership | | |

-  Classes 
-  Endorsements 
-  Events 
-  Event Sessions 

Paragraph   

STEP 14

Enter the Category

Purchase Order Number

: :

| | ↕ Name | ↕ Category | ↕ Description | ↕ SKU |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| CS | Principal Le | er Conferencē | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

STEP 15

Enter the description

Purchase Order Number

:

| Name | ↕ Category | ↕ Description | ↕ SKU | ↕ Quantity | ↕ |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Principal Le | Summer Conf | Exhibitor Fee | <input type="text"/> | 1 | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

STEP 16

Enter the price

| SKU | Quantity | Unit Price | Subtotal | |
|----------------------|----------|------------------------------------|----------|--|
| <input type="text"/> | 1 | <input type="text" value="\$250"/> | \$0.00 | |
| | | | | |
| Subtotal: | | | | |
| Total : | | | | |

STEP 17

Check for accuracy

Optionally select 1 Contact [Add Remittance Contact](#)

| Name | Position | Department | Email | Phone |
|-------------------------|-----------------|------------|---------------------------|-------|
| Alex Administrator-XSBA | Board Secretary | | alexadminxsba@yopmail.com | |

General Activity Associated Items

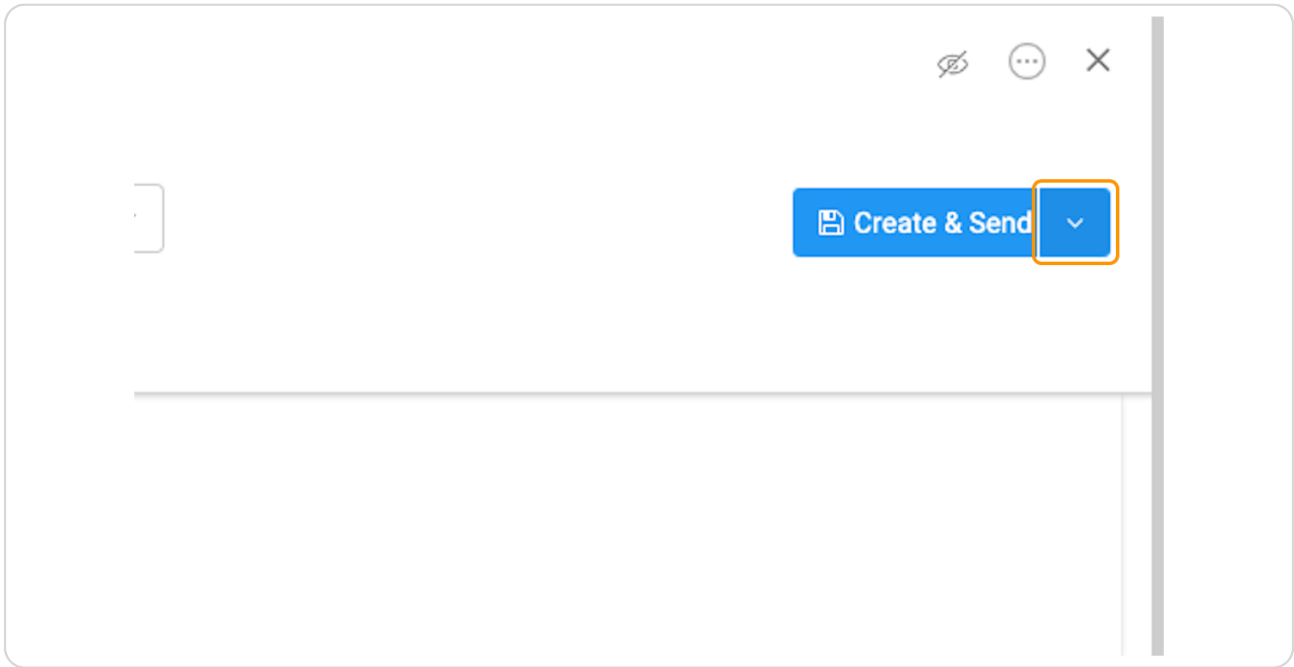
Invoice Date and Time* : Purchase Order Number

| # | Who is this for? | Name | Category | Description | SKU | Quantity | Unit Price | Subtotal | |
|-----------|------------------|--------------|-------------|---------------|----------------------|----------|------------------------------------|----------|--|
| 1 | TARA BANKS | Principal Le | Summer Conf | Exhibitor Fee | <input type="text"/> | 1 | <input type="text" value="\$250"/> | \$0.00 | |
| | | | | | | | | | |
| Subtotal: | | | | | | | | | |
| Total : | | | | | | | | | |

Memo

STEP 18

Click on Create & Send



STEP 19

or Create & Hold

