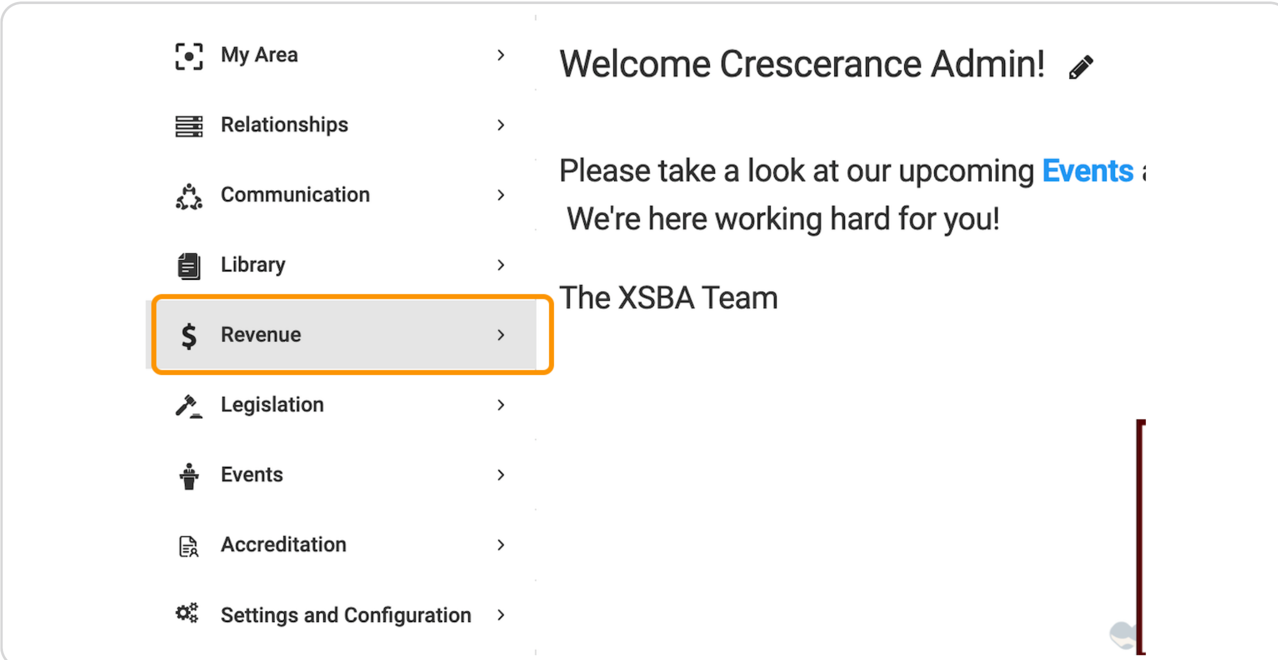
Creating Held Invoices

12 Steps [View most recent version](#)

Created by	Creation Date	Last Updated
Engagifii Inc.	November 29, 2023	November 29, 2023

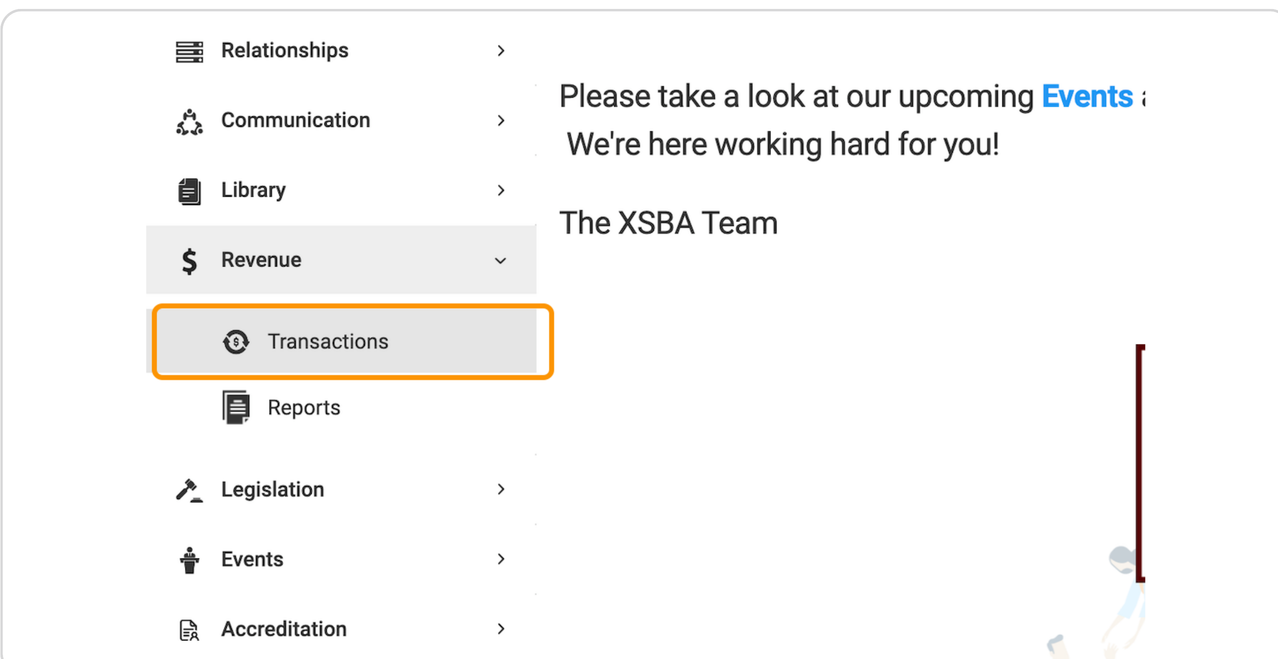
STEP 1

Click on Revenue



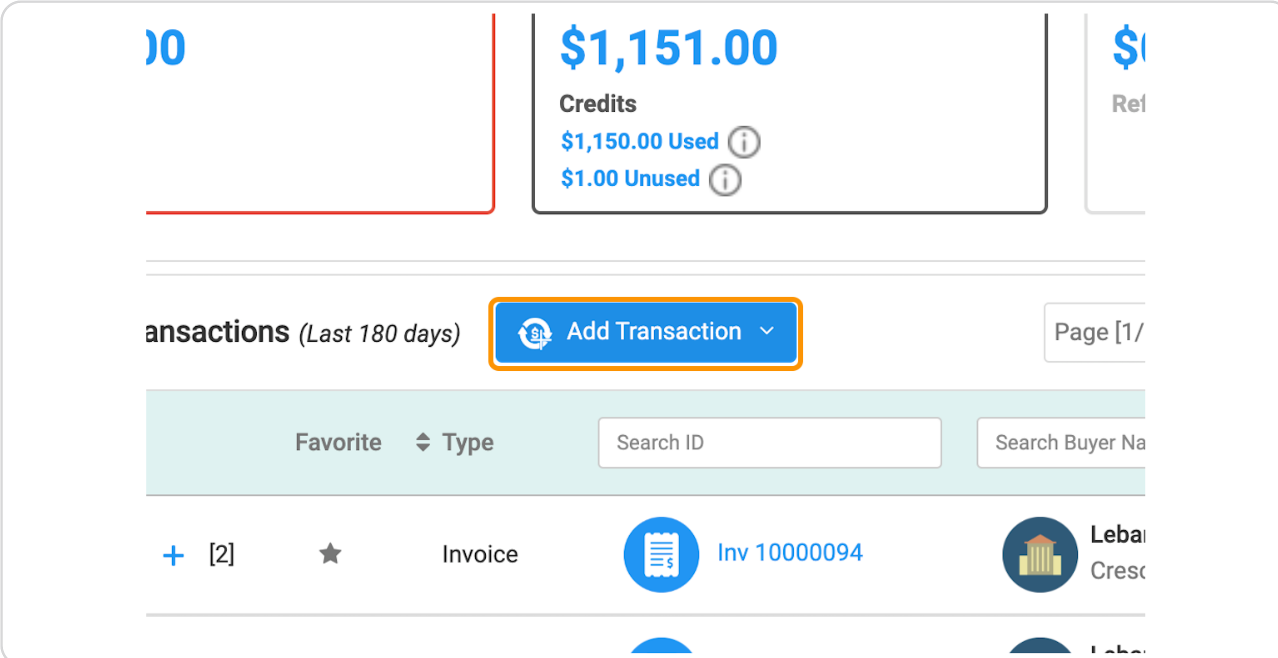
STEP 2

Click on Transactions



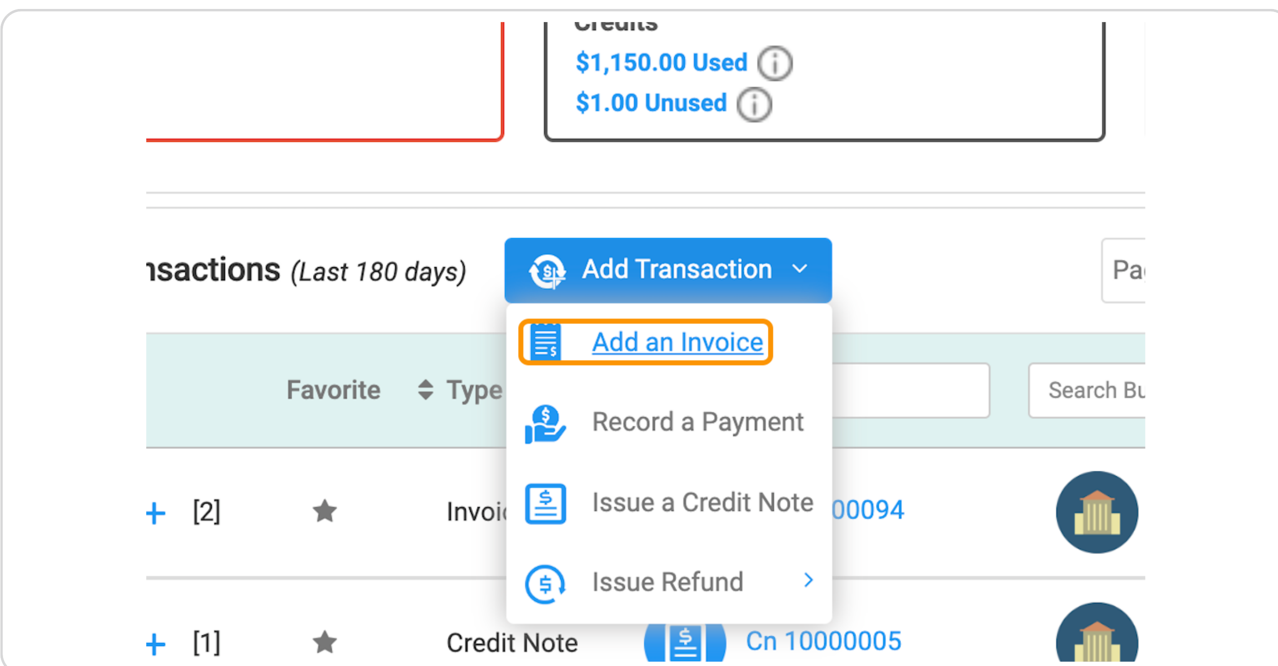
STEP 3

Click on Add Transaction



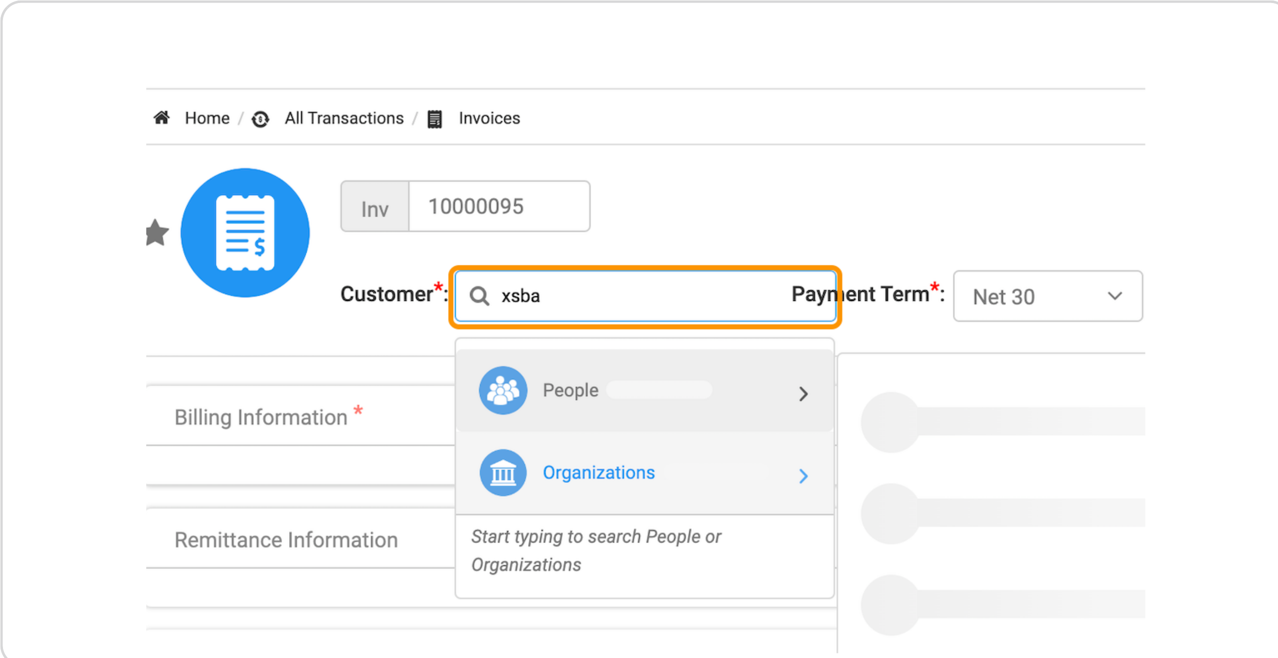
STEP 4

Click on Add an Invoice



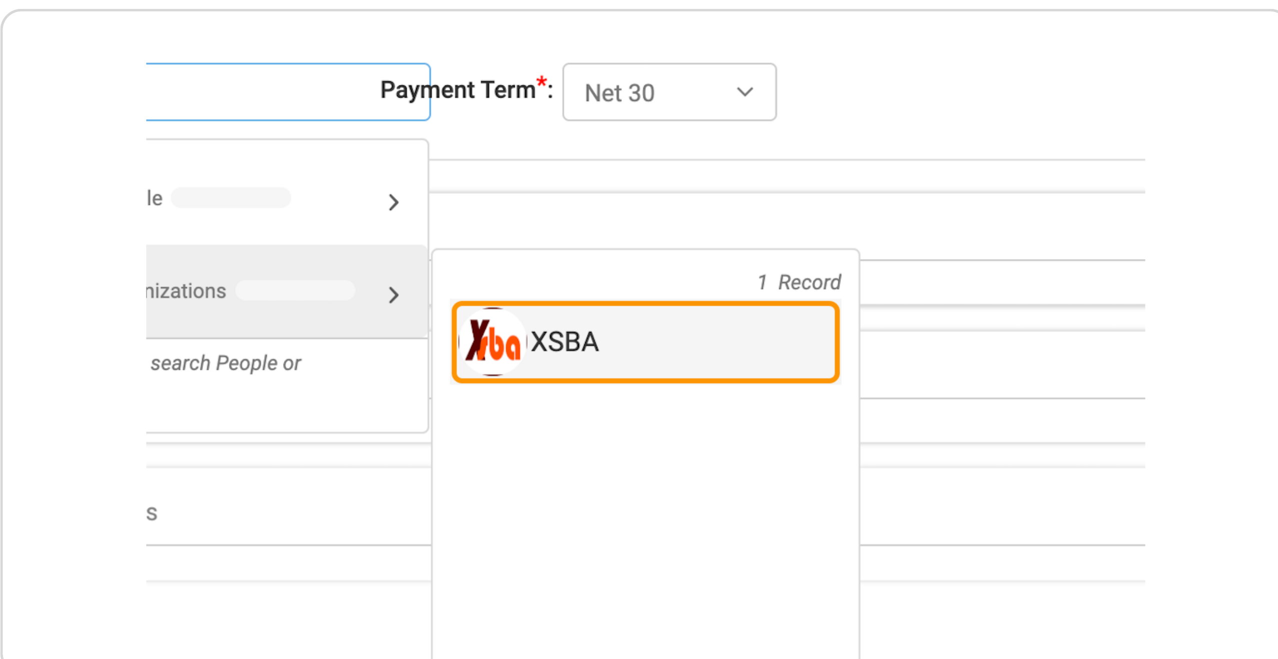
STEP 5

Type in the Customer Name (who will this invoice be for?)



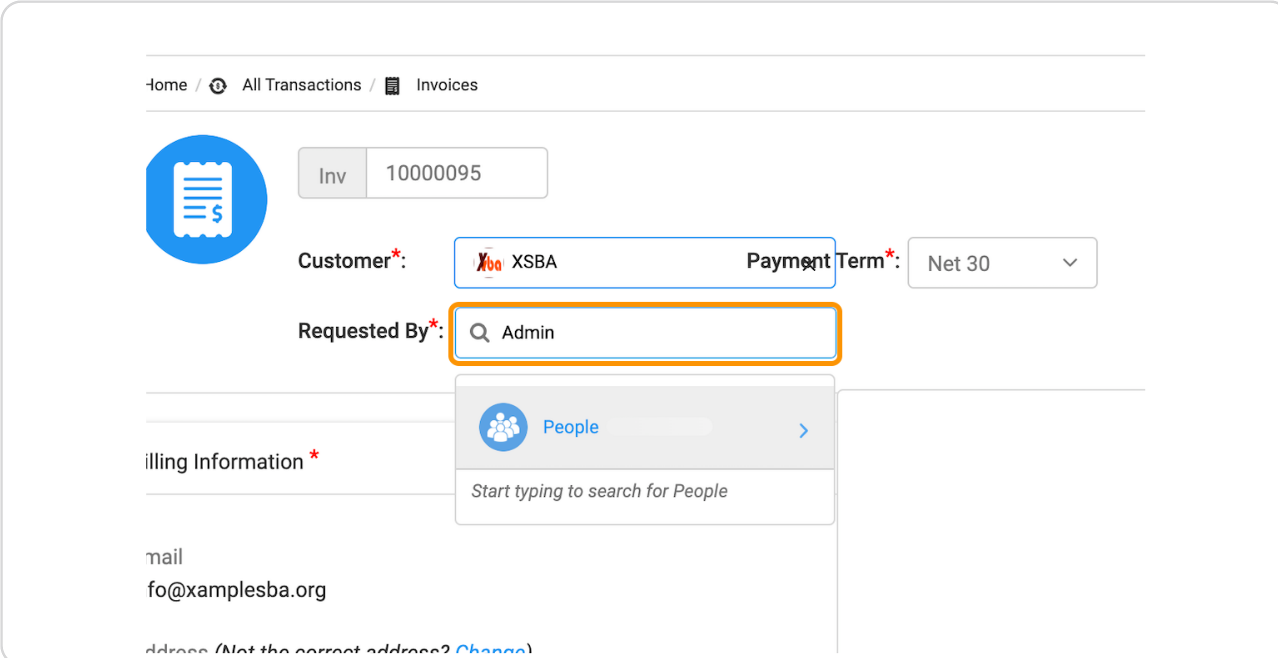
STEP 6

Click on your selection for the Customer



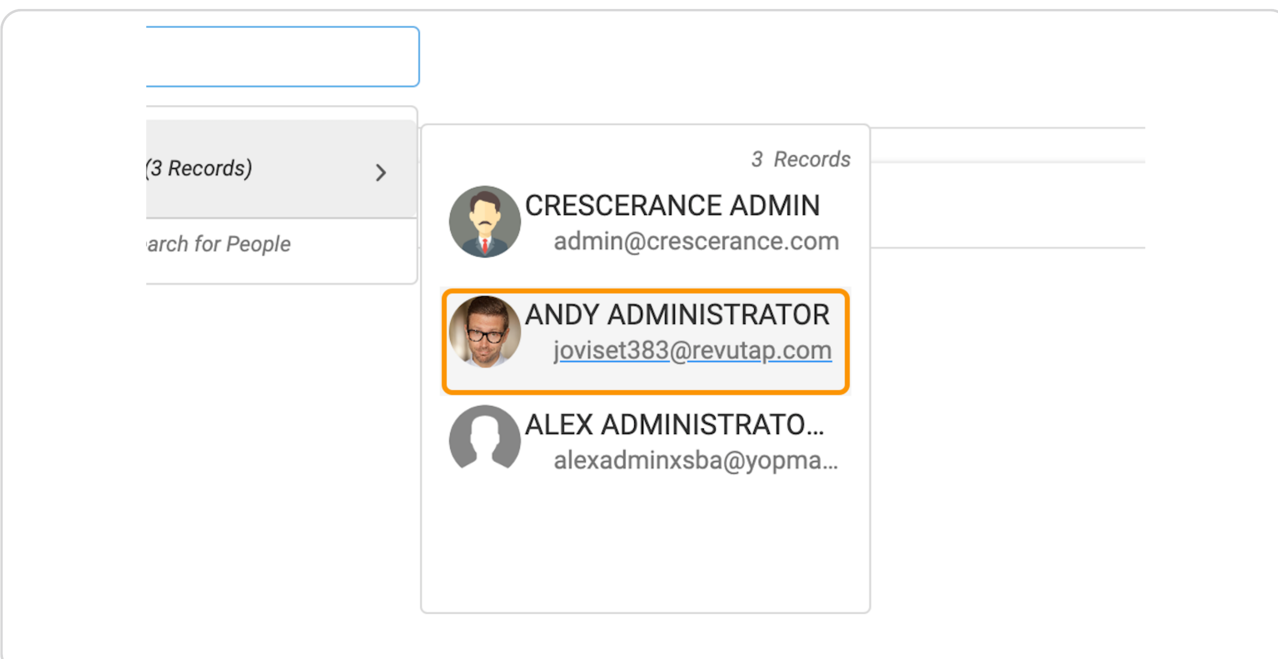
STEP 7

Type in who requested this invoice



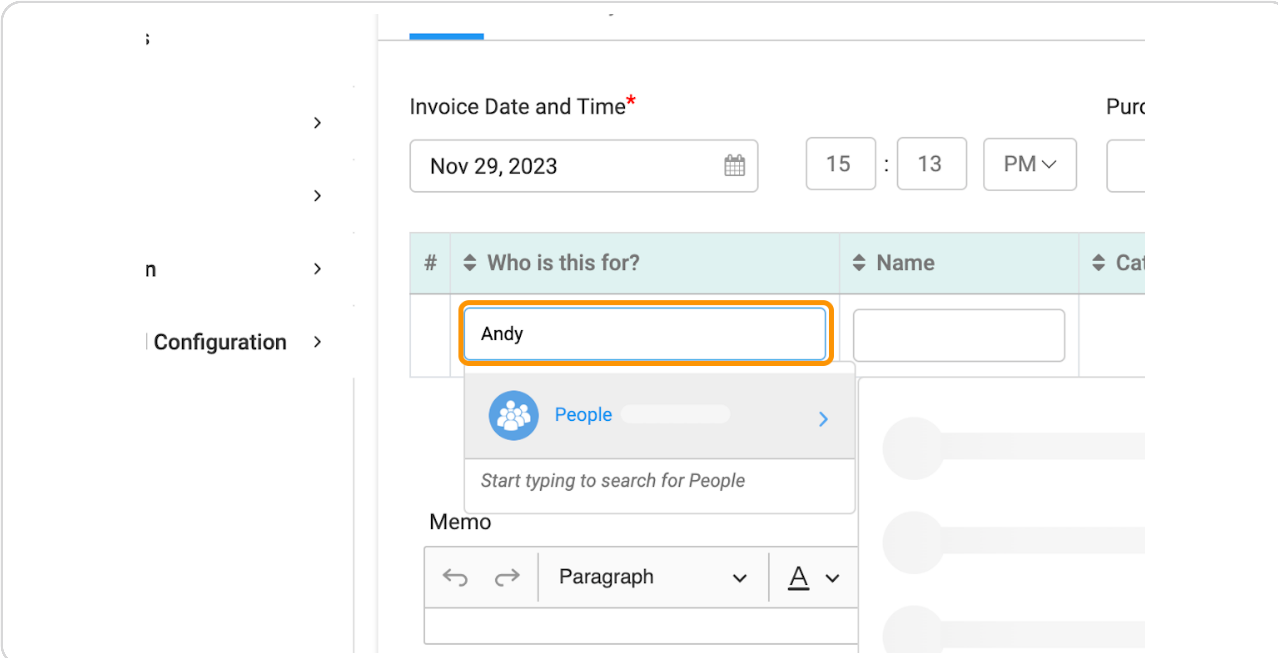
STEP 8

Click on the person who requested it



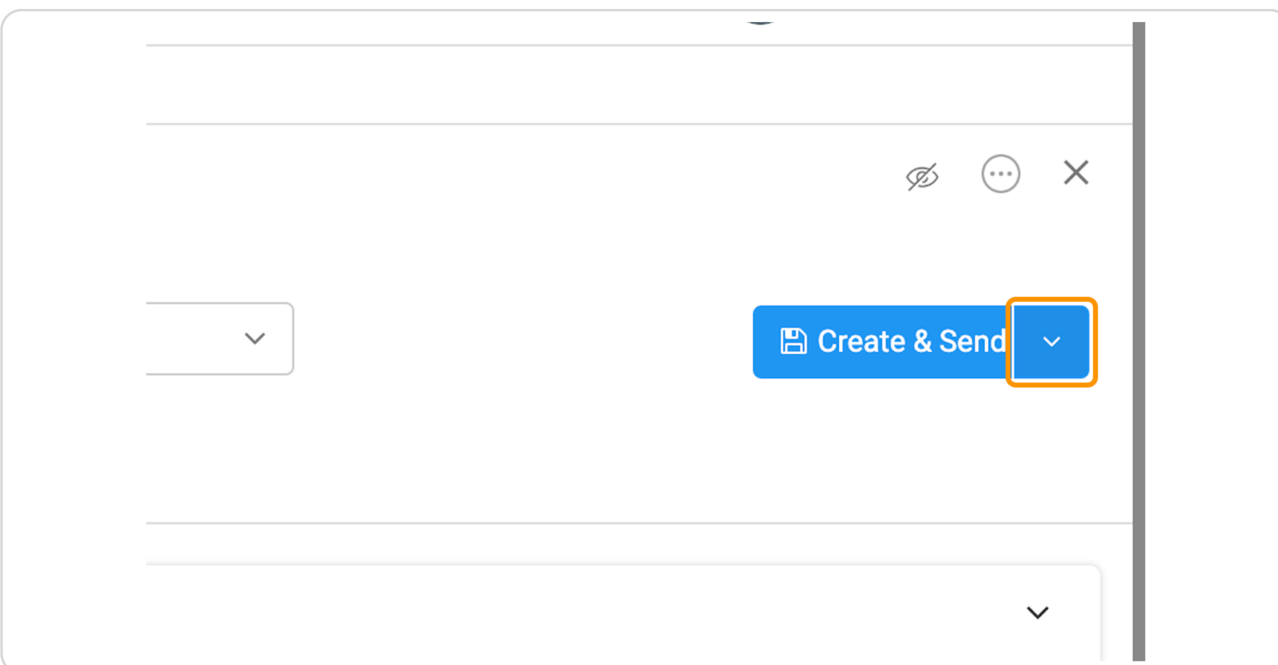
STEP 9

Fill out the invoice as needed, for as many people as needed



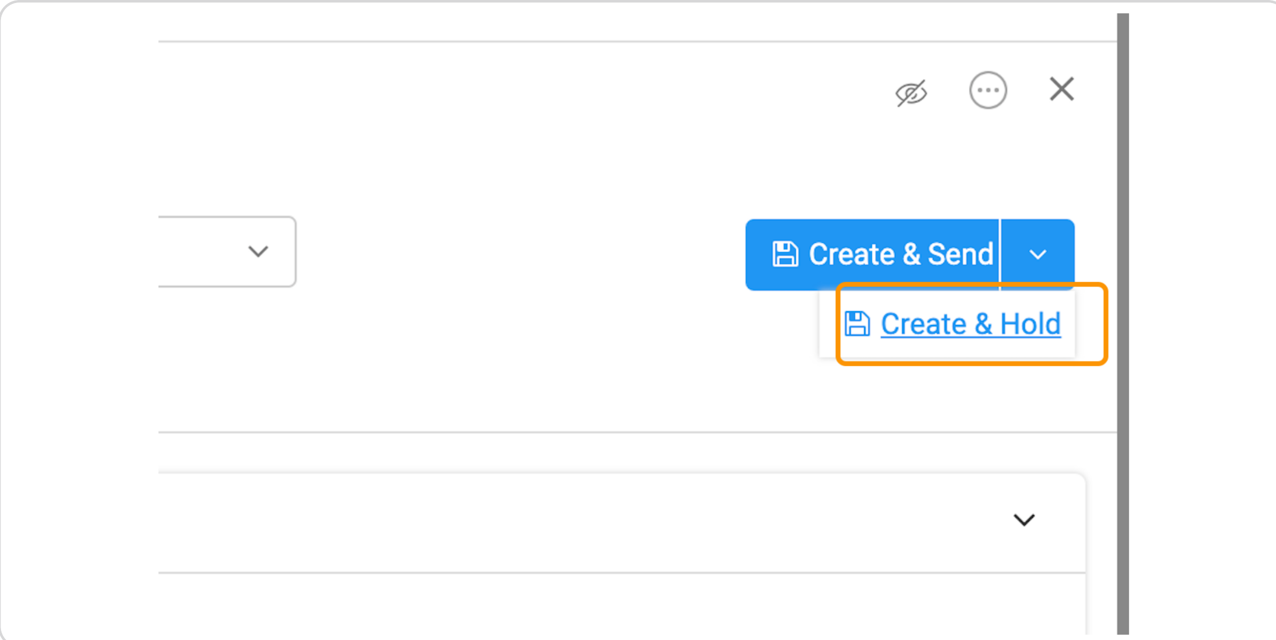
STEP 10

Click on the arrow to the right of Create & Send



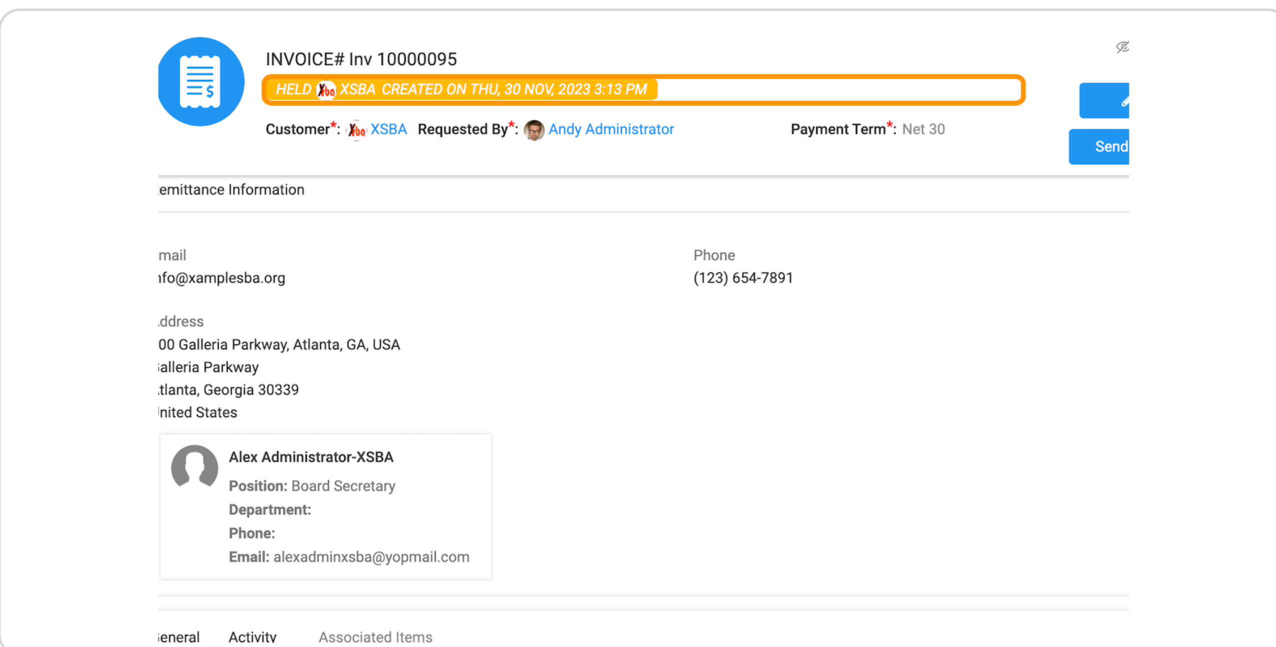
STEP 11

Click on Create & Hold



STEP 12

You'll know that the invoice is held if you see the yellow banner under the Invoice Number at the top



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