

Creating Held Invoices

12 Steps [View most recent version](#) 

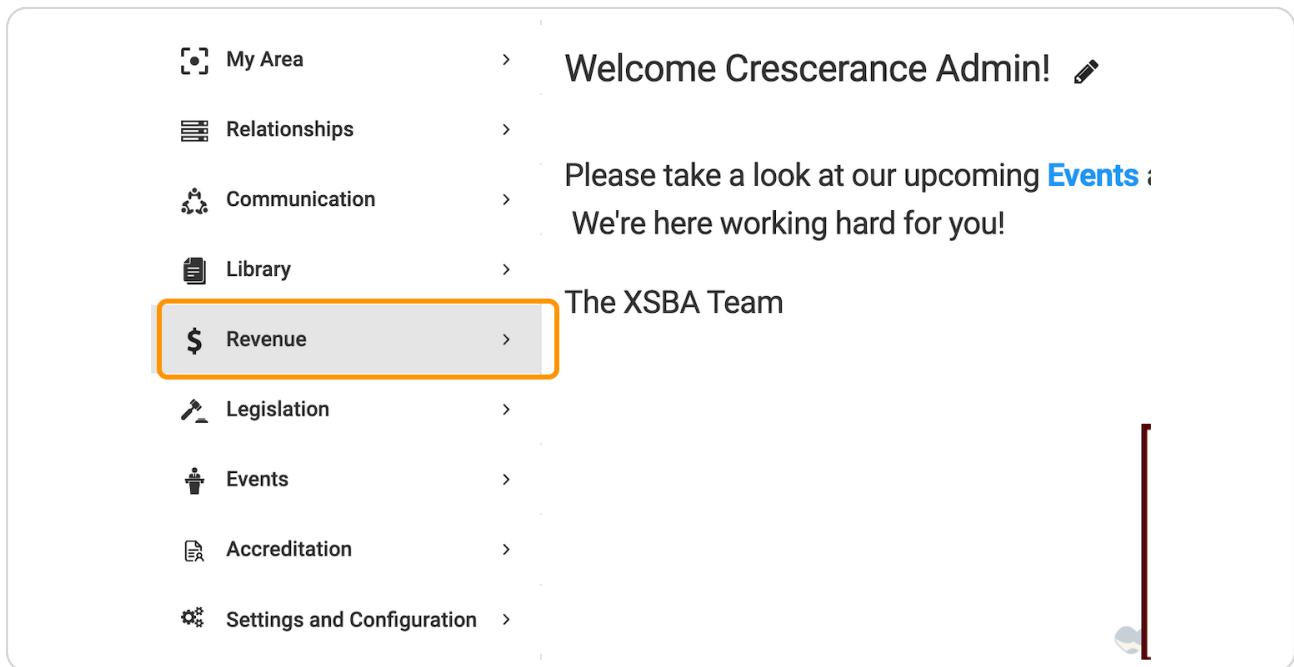
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STEP 1

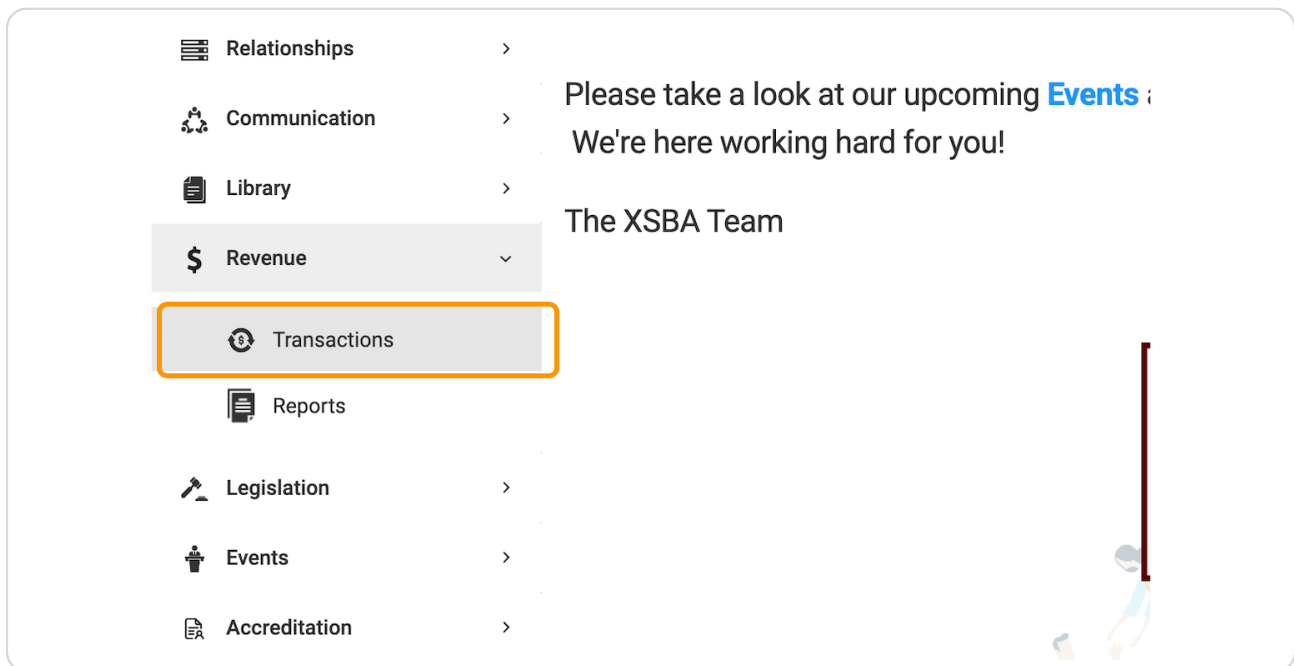
Click on Revenue



A screenshot of a dashboard interface. On the left is a vertical menu with the following items: 'My Area', 'Relationships', 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', 'Accreditation', and 'Settings and Configuration'. The 'Revenue' item is highlighted with a grey background and an orange border. To the right of the menu, the main content area displays a welcome message: 'Welcome Crescerance Admin!' followed by 'Please take a look at our upcoming Events : We're here working hard for you!' and 'The XSBA Team'. A vertical scrollbar is visible on the right side of the main content area.

STEP 2

Click on Transactions



A screenshot of a dashboard interface, similar to the one in Step 1. The 'Revenue' item in the left menu is expanded, showing a sub-menu with 'Transactions' and 'Reports'. The 'Transactions' item is highlighted with a grey background and an orange border. The main content area on the right shows the same welcome message and 'The XSBA Team' text. A vertical scrollbar is visible on the right side of the main content area.

STEP 3

Click on Add Transaction

The screenshot shows the top section of the Engagifii interface. On the left, there is a balance of \$0. On the right, the total credit balance is \$1,151.00, with \$1,150.00 used and \$1.00 unused. Below this, the 'Transactions (Last 180 days)' section is visible. A blue button labeled 'Add Transaction' with a circular arrow icon is highlighted with an orange border. Below the button are search filters for 'Favorite', 'Type', 'Search ID', and 'Search Buyer Name'. A list of transactions is partially visible, including an 'Invoice' with ID 'Inv 1000094' and a 'Credit Note' with ID 'Cn 1000005'.

STEP 4

Click on Add an Invoice

This screenshot shows the same interface as Step 3, but with the 'Add Transaction' dropdown menu open. The menu options are: 'Add an Invoice' (highlighted with an orange border), 'Record a Payment', 'Issue a Credit Note', and 'Issue Refund'. The background shows the same balance and transaction list as in Step 3.

STEP 5

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

The screenshot shows a web interface for creating an invoice. At the top, there is a breadcrumb trail: Home / All Transactions / Invoices. Below this, there is a star icon, a blue circular icon with a document and dollar sign, and an 'Inv' field with the value '10000095'. The 'Customer*' field contains the text 'xsba' and is highlighted with an orange border. To its right is a 'Payment Term*' dropdown menu set to 'Net 30'. Below the search field, a dropdown menu is open, showing two options: 'People' and 'Organizations', both with right-pointing arrows. Below these options is a text prompt: 'Start typing to search People or Organizations'. The background shows a form with sections for 'Billing Information *' and 'Remittance Information'.

STEP 6

Click on your selection for the Customer

This screenshot is a close-up of the dropdown menu from the previous step. The 'Payment Term*' dropdown is visible at the top, set to 'Net 30'. The dropdown menu is open, showing a search bar with the text 'le' and a right-pointing arrow. Below the search bar, there are two main categories: 'Organizations' and 'search People or'. The 'Organizations' category is highlighted with a grey background and has a right-pointing arrow. Below it, a search result is displayed: '1 Record' followed by a box containing the 'Xba' logo and the text 'XSBA'. This result is highlighted with an orange border. The background shows a form with a table structure.

STEP 7

Type in who requested this invoice

home / All Transactions / Invoices

Inv 10000095

Customer*: XSBA Payment Term*: Net 30

Requested By*: Admin

Billing Information *

mail
fo@xamplesba.org

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

People
Start typing to search for People

STEP 8

Click on the person who requested it

(3 Records) >

Search for People

3 Records

- CRESCERANCE ADMIN
admin@cescerance.com
- ANDY ADMINISTRATOR
joviset383@revutap.com
- ALEX ADMINISTRATO...
alexadminxsba@yopma...

STEP 9

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

Invoice Date and Time* Purc

Nov 29, 2023 15 : 13 PM ▾

#	Who is this for?	Name	Ca
	Andy		

People ▸

Start typing to search for People

Memo

↶ ↷ Paragraph ▾ A ▾

STEP 10

Click on the arrow to the right of Create & Send

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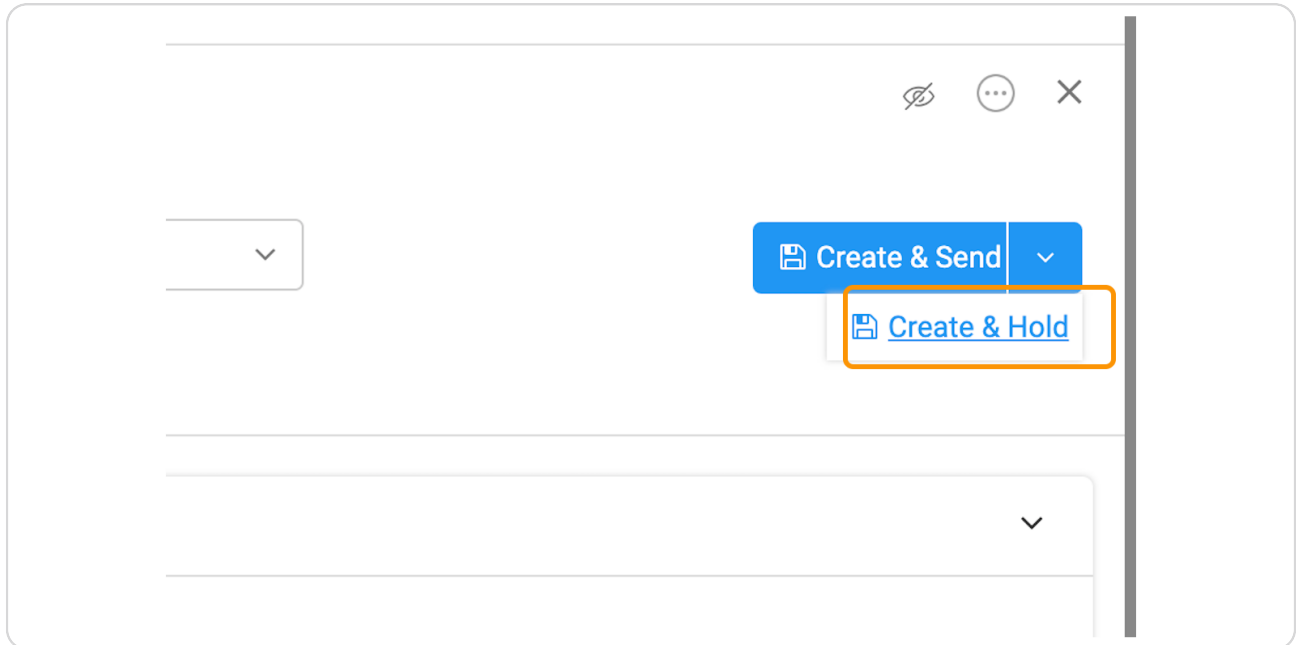
▾

📄 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

