

Invoicing Manual

Set yourself up to invoice your customers

- 1 Select invoice from Main Menu
- 2 Select entity
- 3 Set up your customers by selecting Customers at top of screen
- 4 Complete customer details and save

New customer ✕

Customer name *
J Smith

Address *
1 Chartwell Glen, Rototuna, Hamilton 3210

Email
smith@business.co.nz

Phone
07 1133445

Description
Retail

SAVE

5 Set up you invoice items by selecting Products & Services at top of screen

6 Complete product details and save

Rose Devine



Product/service name *
 Rose Devine

Price *
10.00

GST(%)
 15% ▼

Description
 Essential Oil

✓ SAVE

RESET

Now you are ready to generate an invoice

7 Select Add Invoice button

You can add unique comments to an invoice in addition to the permanent notes already saved

Tax Invoice ✕

Customer: **J Smith** ▼

1 Chartwell Glen, Rototuna, Hamilton 3210

smith@business.co.nz

Invoice number: **00000121**

GST number: **122-456-789**

P.O. number: **501**

Invoice date: **01 / 06 / 2020** ✕

Payment due: **30 / 06 / 2020** ✕

Items	Description	Unit	Price	GST Rate	GST	Amount	
Rose Devine	Essential Oil	10	10	15% ▼	\$15	\$115.00	✕
Add a product/service ▼							
						Total: \$115.00	
						GST: \$15.00	

Notes: Thanks for your support

✓ SAVE RESET

Once an invoice is saved it appears on the list of open invoices on the Invoices home page

Select entity
j1 Ltd

INVOICES CUSTOMERS PRODUCTS & SERVICES

Paid invoices [ADD INVOICE](#)

☰ TAXTEAM > INVOICE 🔔

#00000044 27/05/2020	P.O. No:	Customer: j2	\$-103.5	EDIT PAY
#00000050 27/05/2020	P.O. No:	Customer: j3	\$-103.5	EDIT PAY
#00000052 27/05/2020	P.O. No:	Customer: j2	\$23	EDIT PAY
#00000053 27/05/2020	P.O. No:	Customer: j3	\$11.5	EDIT PAY
#00000056 27/05/2020	P.O. No:	Customer: j4	\$11.5	EDIT PAY
#00000059 27/05/2020	P.O. No:	Customer: j4	\$34.5	EDIT PAY
#00000062 27/05/2020	P.O. No: fff	Customer: j3	\$11.5	Sent PAY
#00000082 06/06/2020	P.O. No:	Customer: j3	\$11.5	EDIT PAY
#00000121 14/06/2020	P.O. No: 501	Customer: J Smith	\$115	EDIT PAY

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8 Select the invoice to email it directly to your customer or download it
Once it has been sent the Edit status on the right changes to Sent

9 When payment received select Pay button on right
Once payment recorded the invoice will drop off open invoice list

10 To view paid invoices select Paid Invoice Toggle

This will show list of paid invoices.

To view the payment history of an invoice simply open the invoice

TAX INVOICE

GST: 122-456-789
j1 Ltd
44 Johnstone Street, Tinwald, Ashburton 7700
selfemployed@hardwork.co.nz

Bill to
j2
1 Queen Street, Auckland Central, Auckland
1010

Invoice number: 00000046
P.O. number:
Invoice date: 27/05/2020
Due date: 26/06/2020
Amount Due: \$0

Items	Description	Quantity	Price	Amount
oil	oil put in	2	\$10	\$20.00
Total:				\$20.00
GST:				\$3.00
Payment on May 27, 2020:				\$10.00
Payment on May 27, 2020:				\$13.00
Amount Due:				\$0.00

NOTES
Please make payment to Kiwibank 38-90220044776-00 Use invoice number as reference