# Invoices Quick Start

Invoices · https://evergreenworx.com/docs/invoices-quick-start/

EvergreenWorx Invoices is a configurable software application designed for small businesses with the need for maintaining and tracking billing end-to-end. Major supported business functions include:

- Maintenance of cost data for products
- Handling of billing agreements
- Generation and management of invoices
- Document storage and auditing
- Powerful chart and dashboard-driven business intelligence

EvergreenWorx Invoices is hosted on your organization's exclusive Microsoft Azure tenant. The Azure tenant, Active Directory security and all data are fully controlled by your organization. Your IT team has full security administration control. EvergreenWorx can share tenancy with your existing Microsoft applications, such as Office 365, Teams, SharePoint or Dynamics. It takes advantage of Azure's SSO security integration, high availability and easy disaster recovery features. EvergreenWorx is designed to easily integrate with other Microsoft technologies.

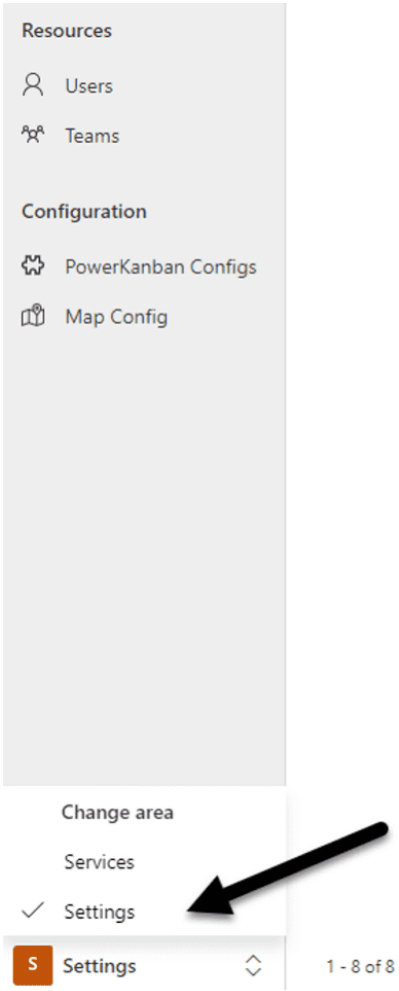
This document acts as a basic user guide for Invoices application users.

If you have not already installed the Invoices application please refer to Getting Started Overview.

## Getting Started with Invoices

Now that your application has been installed, the following steps may be useful in getting the application ready for use.

The application usually opens in the **Services** area. In the navigation pane to the left, at the bottom, ***click*** on the **Services** button and then switch to the **Settings** area.




## Users

***Set up*** individual Users and ***select*** the Security Roles that will be applicable to each User.

Standard roles include the following:

- Admin – this role has advanced ability to modify records, users, and system behavior
- User – this role provides access to the key functions such as creating, editing, and deleting records
- Read-Only – a more restrictive role which limits users to viewing records

You can also assign a User to be the "Manager" (supervisor) for each User, to match your company organizational structure.

Please refer to User Management to review the procedure for setting up Users.

## Lookup Values

Below is a list of areas where you can configure lookup values (picklists) for fields. By setting these values you can assist users with consistency and accuracy in data entry.

## Invoices

Before working with Invoices, define and set up values for the following fields (**note**: the following steps will be used when setting up each field):

1. ***Click*** on "+New" to create each record, then ***fill in*** the required fields and ***press*** **Save**.
2. All created records can be searched for and selected to associate with the appropriate entity:
    - Payment Terms: Used to define how and when payments are expected to be made. Some examples include: Payable On Receipt, Net 30, Net 60, etc. These may be defined on the Billing Agreement instead, especially if invoices will be automatically generated from the agreement.

## Billing Agreements

Before working with Billing Agreements, define and set up values for the following fields (**note**: the following steps will be used when setting up each field):

1. ***Click*** on "+New" to create each record, then ***fill in*** the required fields and ***press*** **Save**.
2. All created records can be searched for and selected to associate with the appropriate entity:
    - Payment Terms: Used to define how and when payments are expected to be made. Some examples include: Payable On Receipt, Net 30, Net 60, etc.

## Products

Products will be used on Billing Agreements, specifically on the Billing Agreement Lines, to define items to be billed.  Before working with Products, define and set up values for the following fields (**note**: the following steps will be used when setting up each field):

1. ***Click*** on "+New" to create each record, then ***fill in*** the required fields and ***press*** **Save**.

2. All created records can be searched for and selected to associate with the appropriate entity:
    - Tax Rates: Used to define the type and amount of tax to be applied to a billed item. Some examples include: State Sales Tax, Local Sales Tax, Excise Tax, etc.
    - Tax Exemptions: Used to define the type of exemption to be applied to a billed item. Some examples include: Sale For Resale, Government, Nonprofit, etc.
    - Units of Measure: Used to define how a quantity of a product will be billed. Some examples include: Case, Each, Gallon, etc.

You can now switch back to the **Services** area to start working with the main section of the application.  You might find the following sequence of setup to be most useful.

## Accounts

- Define and set up Accounts.
- It may also be useful to set up Contacts for each Account if they are available.

## Products

- Define and set up Products.

## Billing Agreements

- Define and set up Billing Agreements, for use with Invoices.

## Invoices

- Define and set up existing Invoices.

## More Knowledge

Now that you have completed the recommended minimum steps to get up and running, you may find the following resources helpful in further using the application.

***Click*** any of the links below to learn more about the features shared across EvergreenWorx applications:

- How to use Dashboards | EvergreenWorx
- Navigating the application | EvergreenWorx
- Timeline | EvergreenWorx
- Activities | EvergreenWorx
- Settings | EvergreenWorx

If you are interested in discovering our other applications, use the following links to get an overview of each of our products:

- Contracts | EvergreenWorx
- Customers | EvergreenWorx
- Employees | EvergreenWorx
- Expenses | EvergreenWorx
- Maintenance | EvergreenWorx