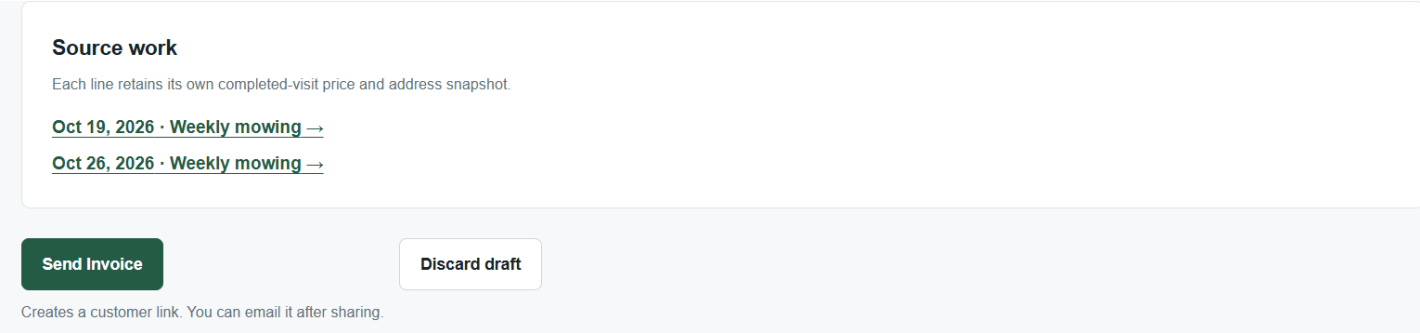
Creating & Sending Invoices

Create invoices from eligible completed visits, then review and share them. Drafting or sending an invoice does not collect payment.

Create and review the draft

1. Open Invoices and select New Invoice. Ready to Invoice lists eligible completed work; use Service date from and Through, then Filter work if needed.
2. Select visits for one customer and select Create Invoice. Draft and sent invoices already reserve their visits, so those visits are not available again.
3. Review the draft. Use Edit draft for Issue date, optional Due date, discount, tax, and messages. Select Save draft after edits.
4. Select Send Invoice when the details are correct. This marks it Sent and creates a customer link; it does not itself send an email.



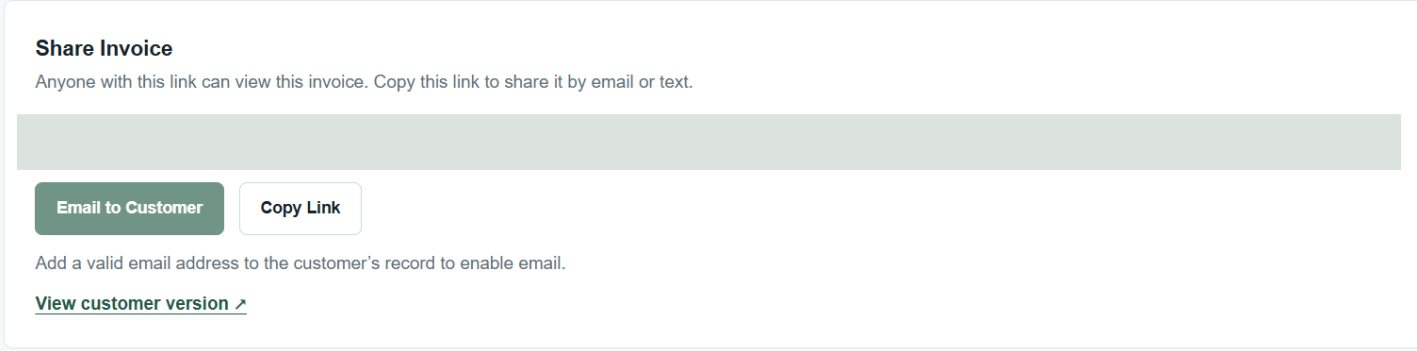
The draft's source-work links and Send Invoice action.

What to expect: The invoice is Sent. It stays Unpaid until a supported payment is recorded.

Creating & Sending Invoices

Share or email the invoice

5. In Share Invoice, select Copy Link and send the link to the customer using your usual email or text app.
6. For email from Yardline, save a valid customer email first, select Email to Customer, confirm the recipient, and select Send Email.
7. Use View customer version to review the customer page. Keep the link private; anyone with it can view the invoice.



The shared invoice controls; the private customer link is removed.

What to expect: Email-provider acceptance does not guarantee delivery. Online card collection is currently disabled. Arrange payment outside Yardline, then use Mark as paid after receipt.