



# Workflow: how to create and send invoices

8 Steps [View on Tango](#)

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Created by

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Creation Date

August 19, 2022

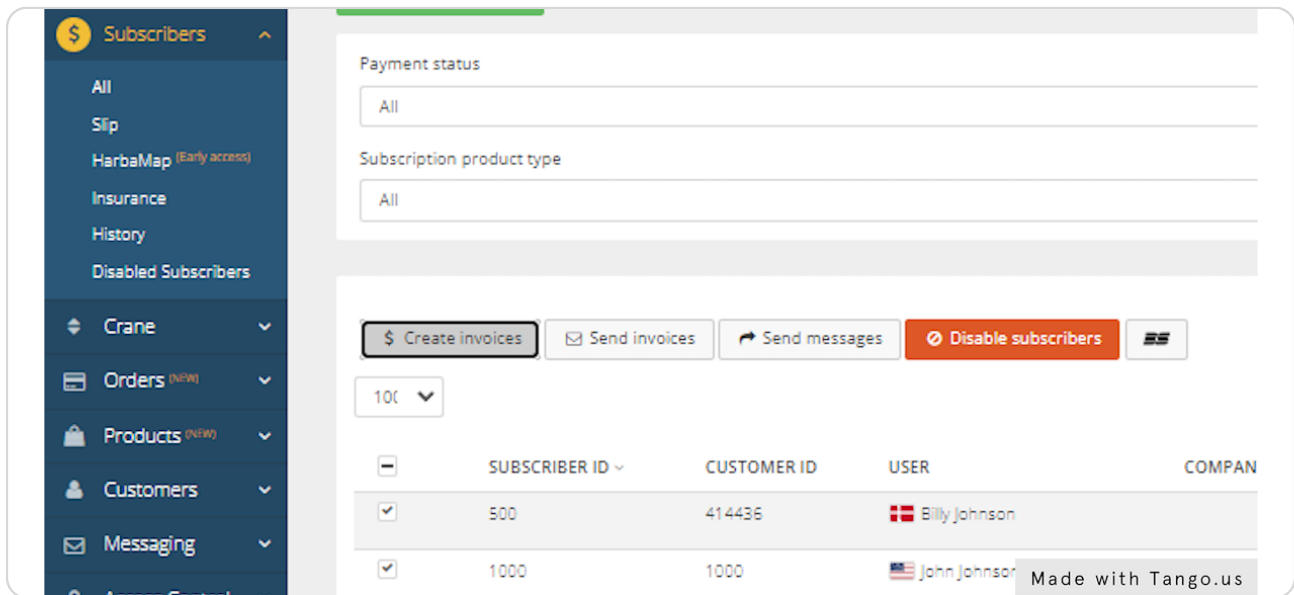
Last Updated

August 19, 2022

## STEP 1

### Click on **Create invoices**

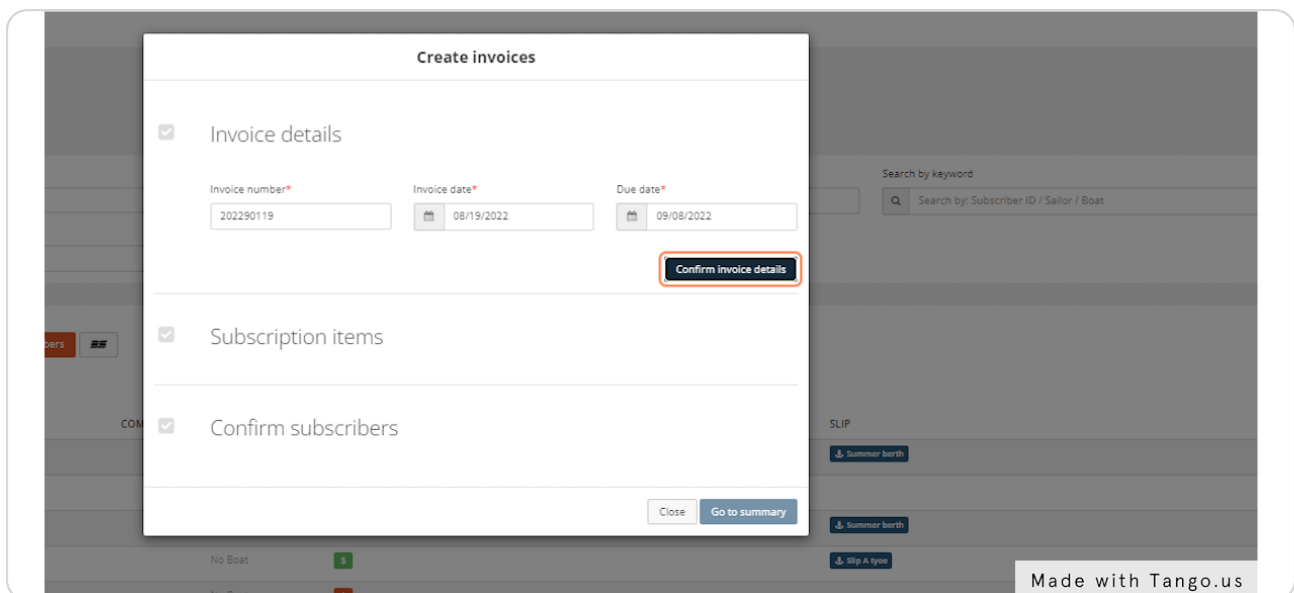
When you have selected the customers that you want to invoice you click on 'create invoices'



## STEP 2

### Click on **Confirm invoice details**

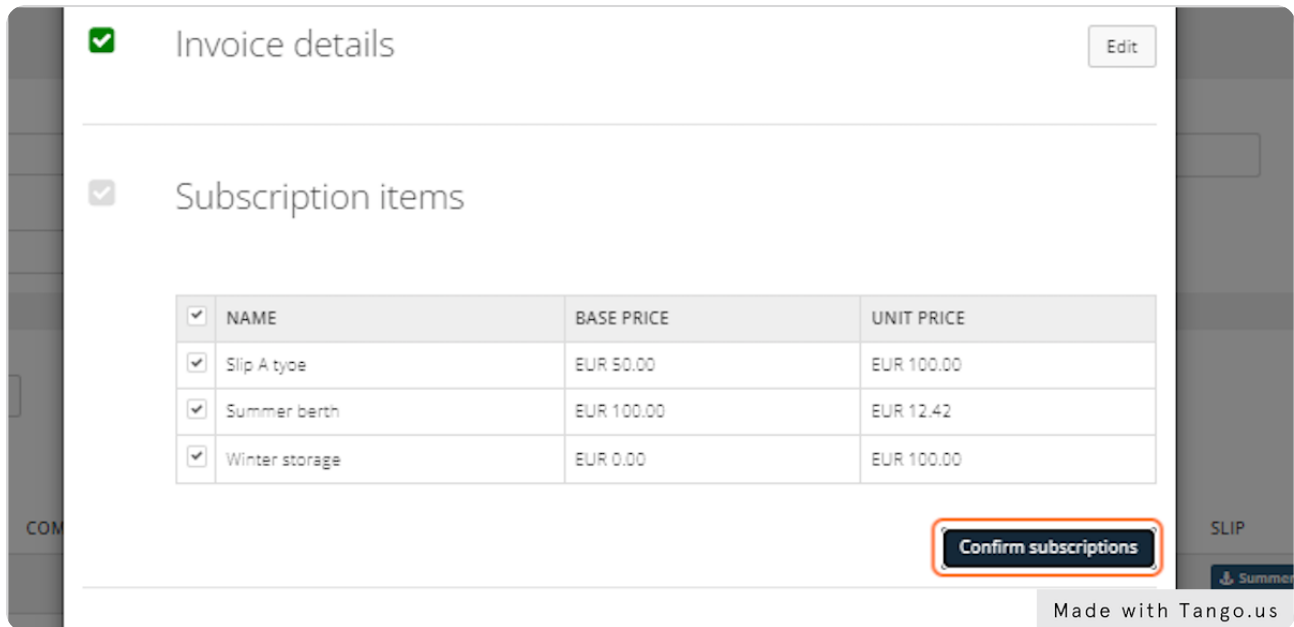
The next step is to confirm the invoice number, invoice date, and due date.



### STEP 3

## Click on Confirm subscriptions

Now you select which subscription items you want to include and confirm



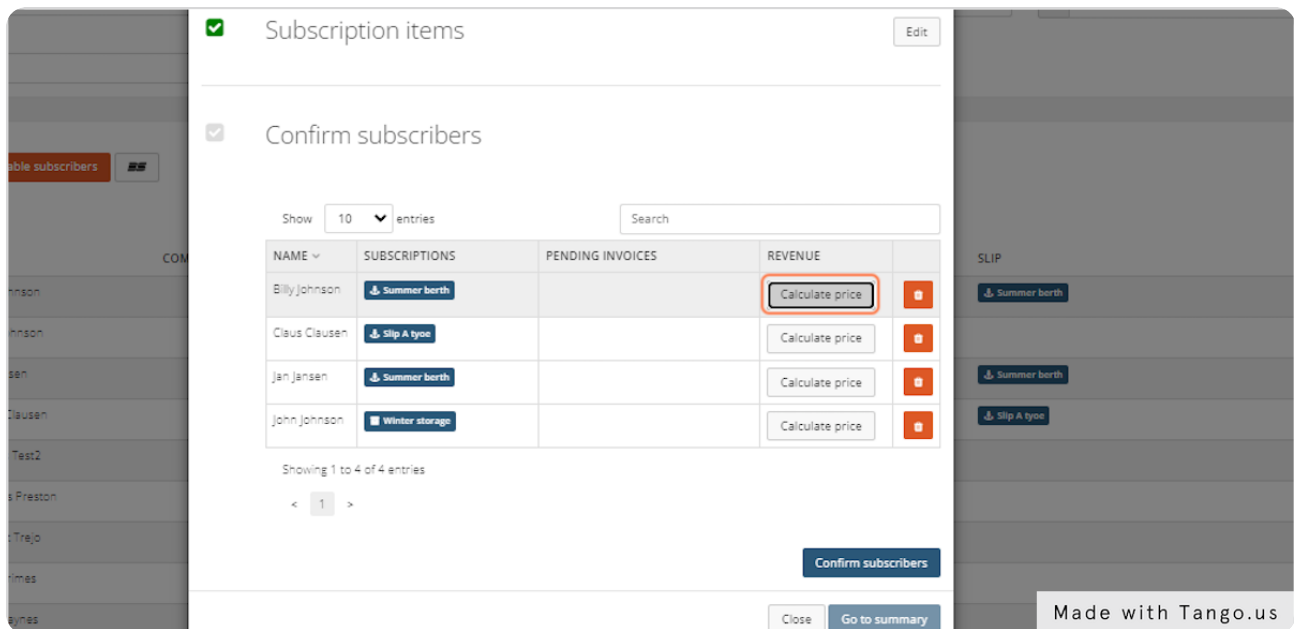
The screenshot shows a window titled "Invoice details" with a green checkmark icon and an "Edit" button. Below the title is a section for "Subscription items" with a checkmark icon. A table lists the items:

<input checked="" type="checkbox"/>	NAME	BASE PRICE	UNIT PRICE
<input checked="" type="checkbox"/>	Slip A tyoe	EUR 50.00	EUR 100.00
<input checked="" type="checkbox"/>	Summer berth	EUR 100.00	EUR 12.42
<input checked="" type="checkbox"/>	Winter storage	EUR 0.00	EUR 100.00

At the bottom right of the window, a "Confirm subscriptions" button is highlighted with a red rectangle. A "Made with Tango.us" watermark is visible at the bottom right of the image.

### STEP 4

## Click on Calculate price



The screenshot shows a window titled "Subscription items" with a green checkmark icon and an "Edit" button. Below the title is a section for "Confirm subscribers" with a checkmark icon. The window includes a search bar and a table with the following data:

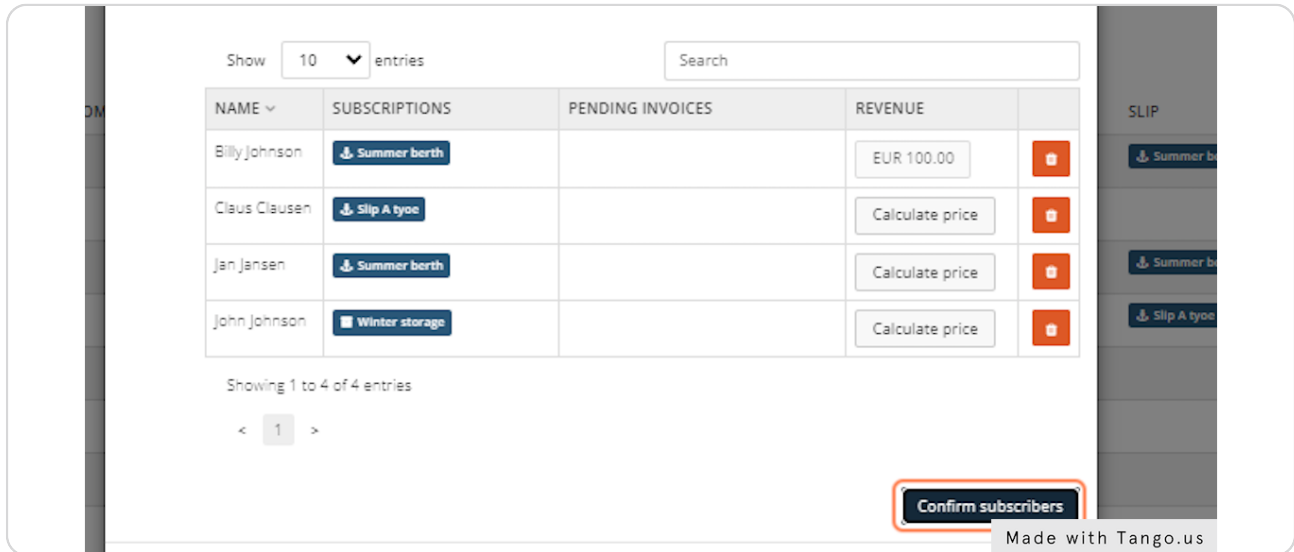
NAME	SUBSCRIPTIONS	PENDING INVOICES	REVENUE
Billy Johnson	Summer berth		Calculate price
Claus Clausen	Slip A tyoe		Calculate price
Jan Jensen	Summer berth		Calculate price
John Johnson	Winter storage		Calculate price

The "Calculate price" button for the first row is highlighted with a red rectangle. Below the table, it says "Showing 1 to 4 of 4 entries" and "1" is shown in a box. At the bottom right, there are "Confirm subscribers", "Close", and "Go to summary" buttons. A "Made with Tango.us" watermark is visible at the bottom right of the image.

## STEP 5

### Click on Confirm subscribers

Here you will see an overview of the customers you are about to invoice and can confirm. You also have the option of clicking on 'calculate price' for each customer, keep in mind that in the next step you will see a summary of total prices for each subscription



The screenshot shows a table with columns: NAME, SUBSCRIPTIONS, PENDING INVOICES, and REVENUE. There are 4 entries. A 'Confirm subscribers' button is highlighted with a red box at the bottom right.

NAME	SUBSCRIPTIONS	PENDING INVOICES	REVENUE
Billy Johnson	Summer berth		EUR 100.00
Claus Clausen	Slip A tyoe		Calculate price
Jan Jansen	Summer berth		Calculate price
John Johnson	Winter storage		Calculate price

Showing 1 to 4 of 4 entries

< 1 >

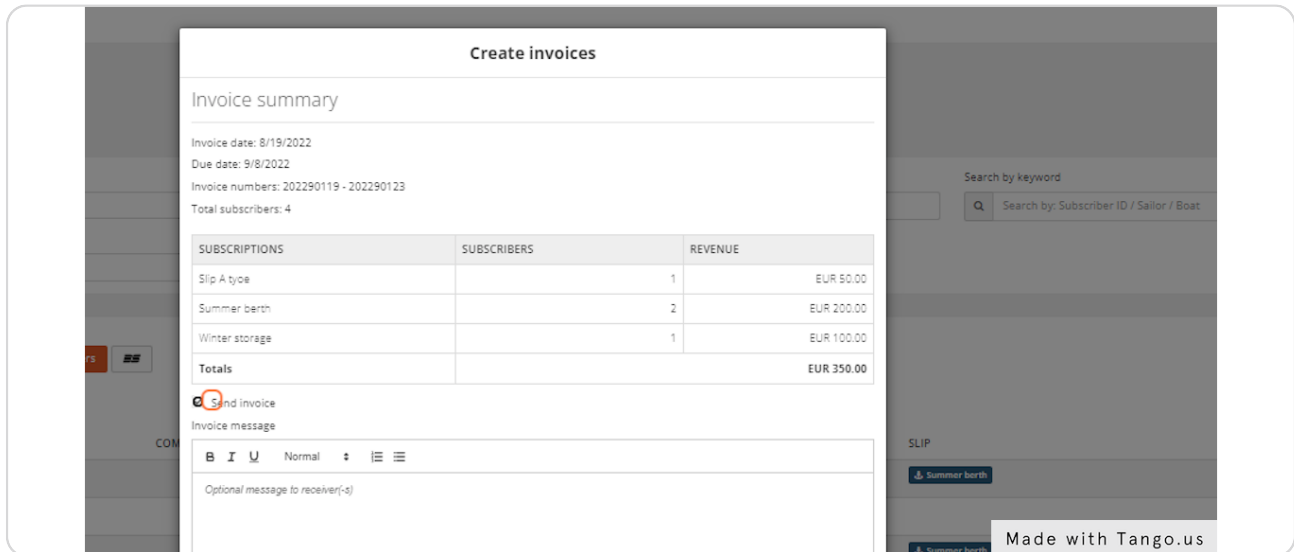
**Confirm subscribers**

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## STEP 6

### Check Send invoice

Here you have the summary and can choose if you want to send the invoices, don't worry the invoices will not be sent just yet. You also have the option to write a message that will be included when you send out the invoices



The screenshot shows the 'Create invoices' summary screen. It includes an 'Invoice summary' section with details like invoice date, due date, and invoice numbers. Below is a table showing the breakdown of subscriptions and their revenues. A 'Send invoice' button is highlighted with a red circle.

**Create invoices**

Invoice summary

Invoice date: 8/19/2022  
Due date: 9/8/2022  
Invoice numbers: 202290119 - 202290123  
Total subscribers: 4

SUBSCRIPTIONS	SUBSCRIBERS	REVENUE
Slip A tyoe	1	EUR 50.00
Summer berth	2	EUR 200.00
Winter storage	1	EUR 100.00
<b>Totals</b>		<b>EUR 350.00</b>

Send invoice

Invoice message

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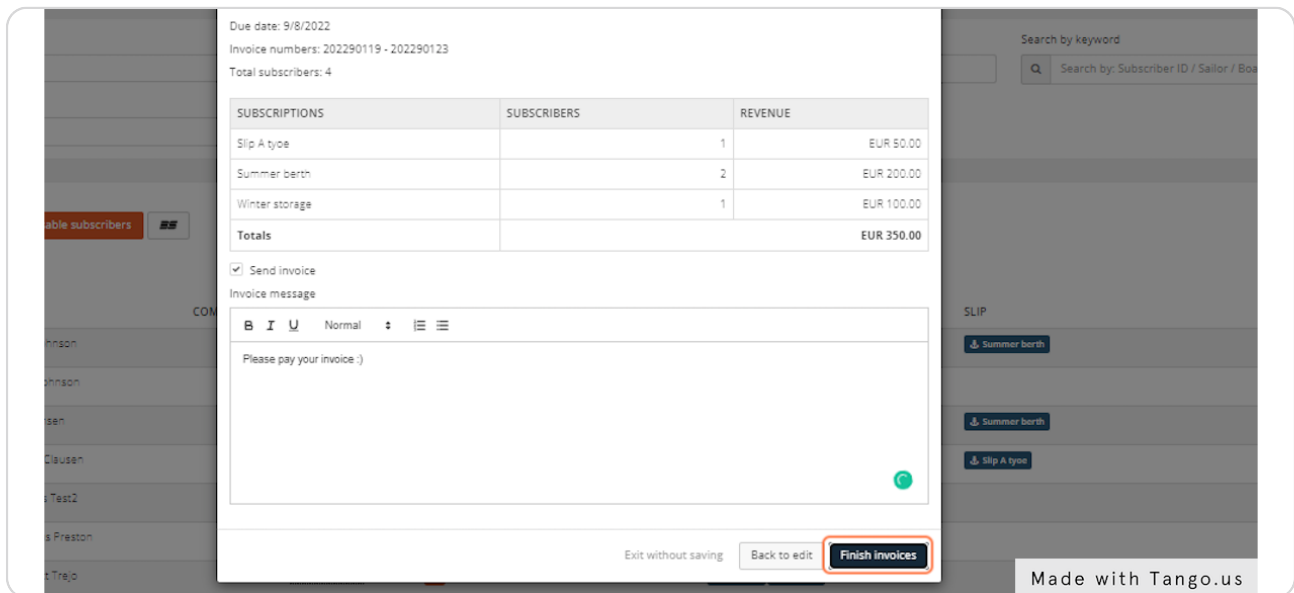
Optional message to receiver(-s)

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## STEP 7

### Click on Finish invoices

If you are satisfied with what you have accomplished you can go ahead and click on 'finish invoices' and your invoices will be sent.



Due date: 9/8/2022  
Invoice numbers: 202290119 - 202290123  
Total subscribers: 4

SUBSCRIPTIONS	SUBSCRIBERS	REVENUE
Slip A type	1	EUR 50.00
Summer berth	2	EUR 200.00
Winter storage	1	EUR 100.00
<b>Totals</b>		<b>EUR 350.00</b>

Send invoice  
Invoice message

Please pay your invoice :)

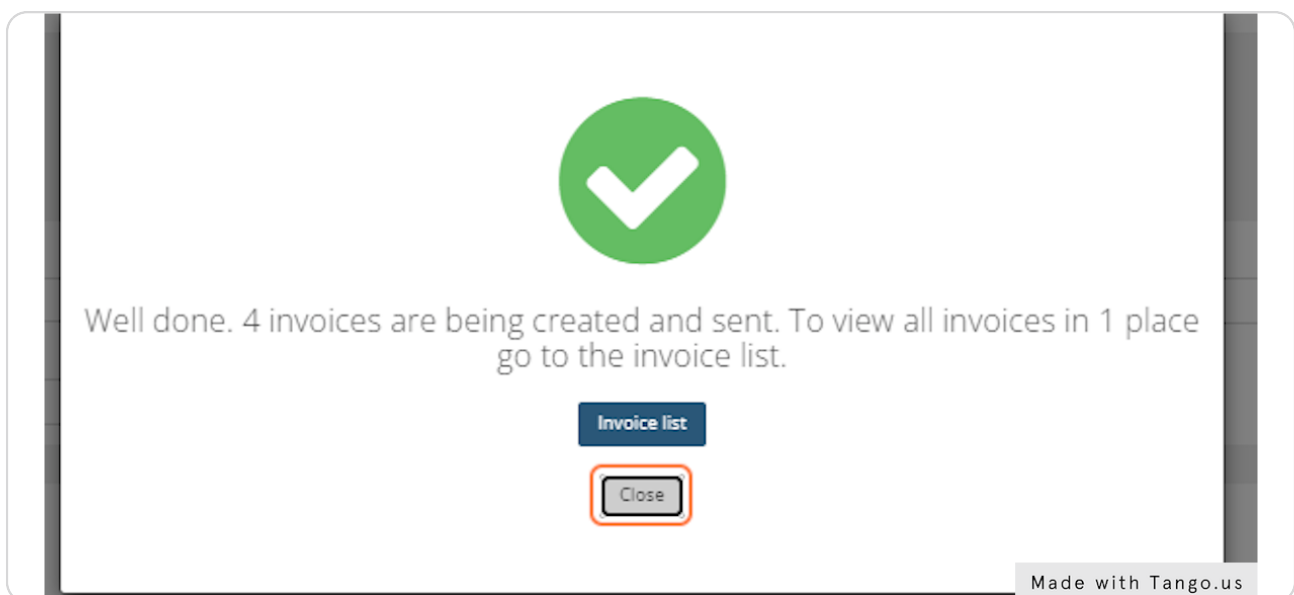
Exit without saving   Back to edit   **Finish Invoices**

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## STEP 8

### Invoices sent

Great job! Invoices have been created and sent



Well done. 4 invoices are being created and sent. To view all invoices in 1 place go to the invoice list.

[Invoice list](#)

[Close](#)

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Created in seconds with

*Tango*