

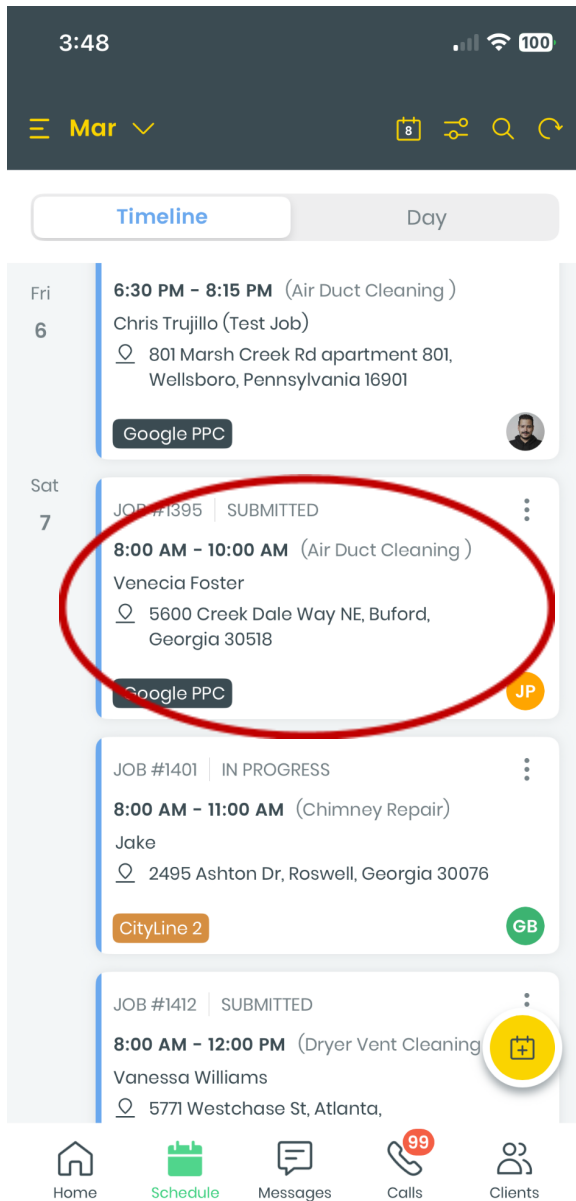
# How to Create an Invoice and Close a Job in the Workiz App

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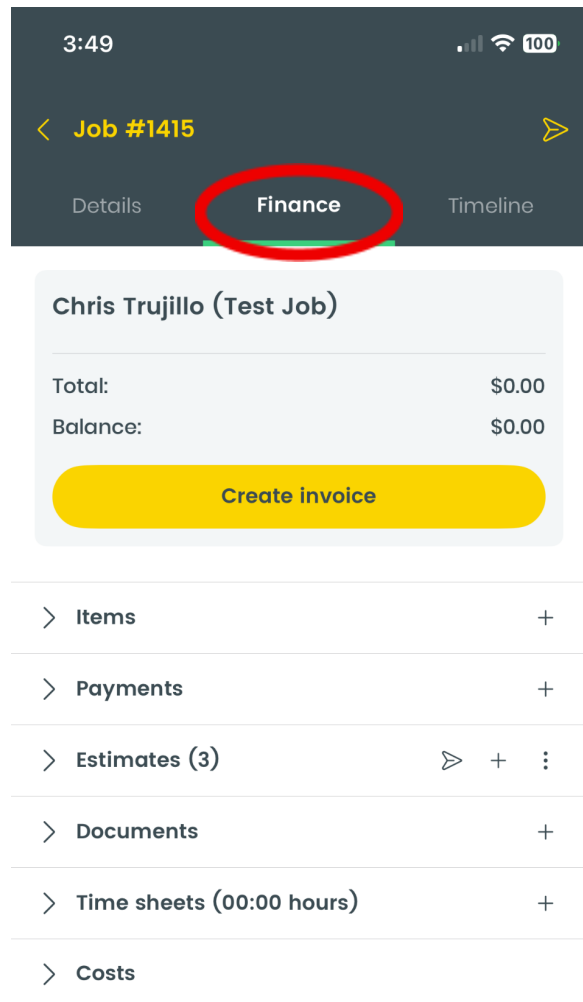
## **Technician Step-by-Step Guide**

This guide explains how technicians should create an invoice, collect payment, and close a job inside the Workiz mobile app. Follow these steps after completing the service at the customer's location.

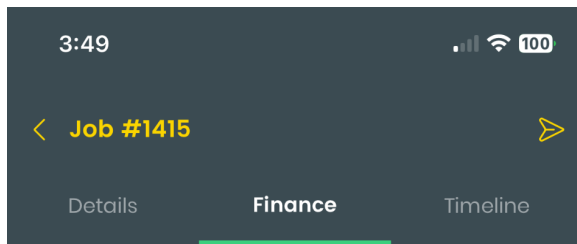
STEP 1 : First click the job scheduled to you.



STEP2: Click FINANCE.

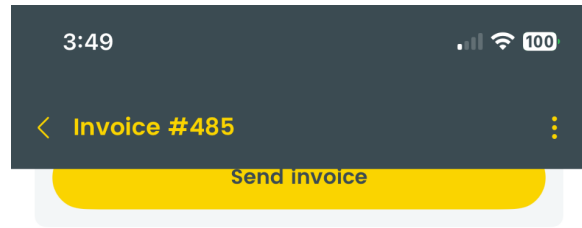


STEP 3: Click CREATE INVOICE.



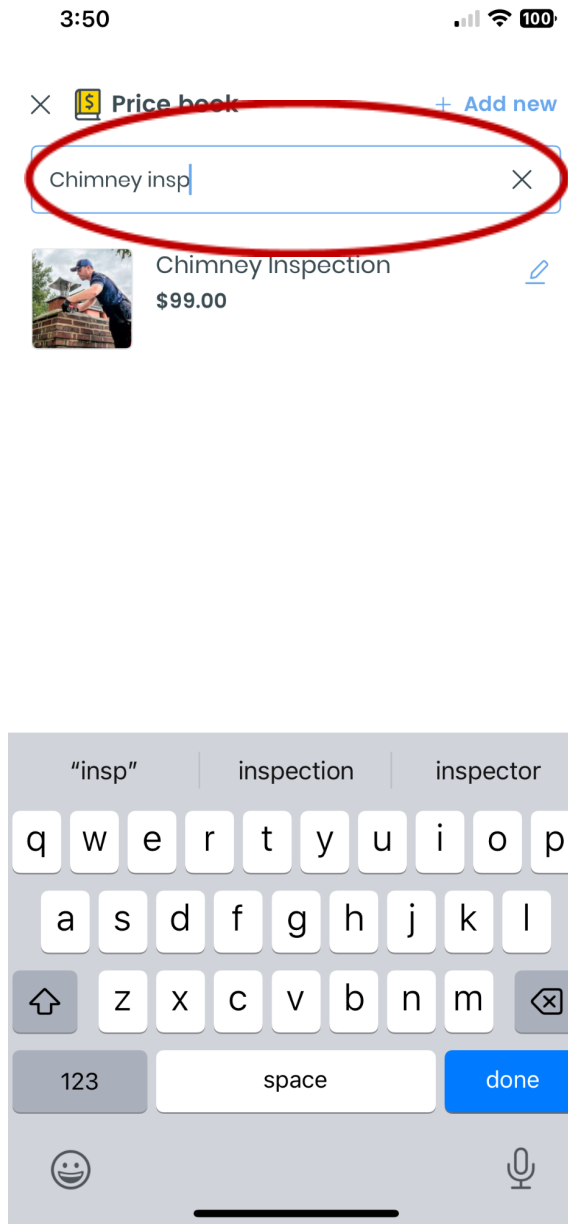
|                             |       |        |
|-----------------------------|-------|--------|
| Chris Trujillo (Test Job)   |       |        |
| Total:                      |       | \$0.00 |
| Balance:                    |       | \$0.00 |
| Create invoice              |       |        |
| > Items                     |       | +      |
| > Payments                  |       | +      |
| > Estimates (3)             | > + : |        |
| > Documents                 |       | +      |
| > Time sheets (00:00 hours) |       | +      |
| > Costs                     |       |        |

STEP 4: Click ADD ITEM.

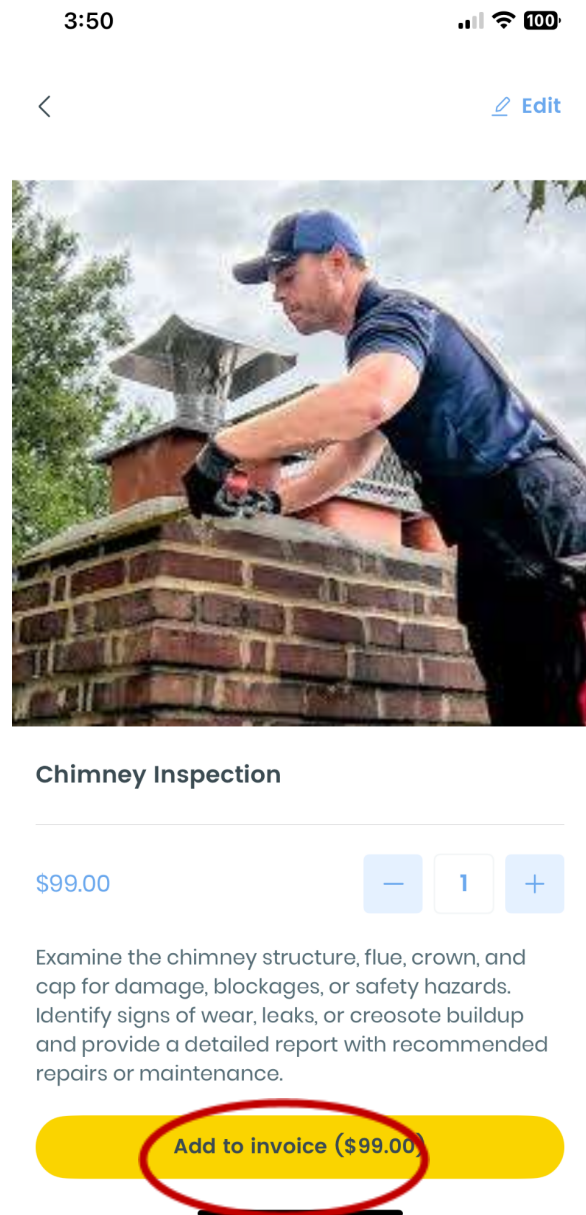


|                 |                |
|-----------------|----------------|
| Items           | +              |
| No items added  |                |
| + Add item      |                |
| Sub total       | \$0.00         |
| Tax rate 0.00%  | \$0.00         |
| Discount        | \$0.00 (0.00%) |
| Total           | \$0.00         |
| Due             | \$0.00         |
| > Payments      | +              |
| > Signatures    | +              |
| > Attachments   | +              |
| > Notes (empty) | +              |

STEP 5: Input the service you provided.



STEP 6: Select the service and click ADD TO INVOICE at the bottom.



STEP 7: Click edit

3:51   

<  Edit



**Chimney Inspection**

\$99.00   

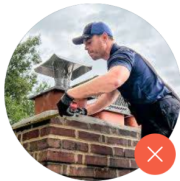
Examine the chimney structure, flue, crown, and cap for damage, blockages, or safety hazards. Identify signs of wear, leaks, or creosote buildup and provide a detailed report with recommended repairs or maintenance.

**Add to invoice (\$99.00)**

STEP 8: Edit the Price or Quantity. Then click APPLY.

3:50   

× Edit item



Item name

Unit price

Markup  %

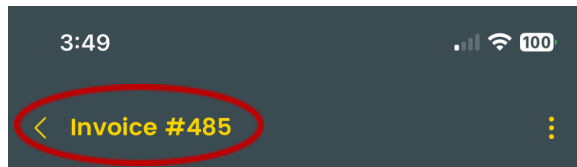
Unit cost

Description

☐ Taxable

**Apply**

STEP 9: Go back to INVOICE



**Chris Trujillo (Test Job)**

801 Marsh Creek Rd apartment 801, Wellsboro,  
Pennsylvania 16901

Total: \$0.00  
Due: \$0.00  
Invoice date: Sat Mar 7th 2026  
Due on: Fri Mar 13th 2026

Send invoice

Items



No items added

+ Add item

|                       |                |
|-----------------------|----------------|
| <b>Sub total</b>      | <b>\$0.00</b>  |
| <u>Tax rate 0.00%</u> | \$0.00         |
| <u>Discount</u>       | \$0.00 (0.00%) |
| <b>Total</b>          | <b>\$0.00</b>  |

STEP 10: Then scroll to PAYMENT and

Click ADD PAYMENT



Total: \$99.00  
Due: \$99.00  
Invoice date: Sat Mar 7th 2026  
Due on: Fri Mar 13th 2026

Send invoice

Items (1)

Payments



No payments added

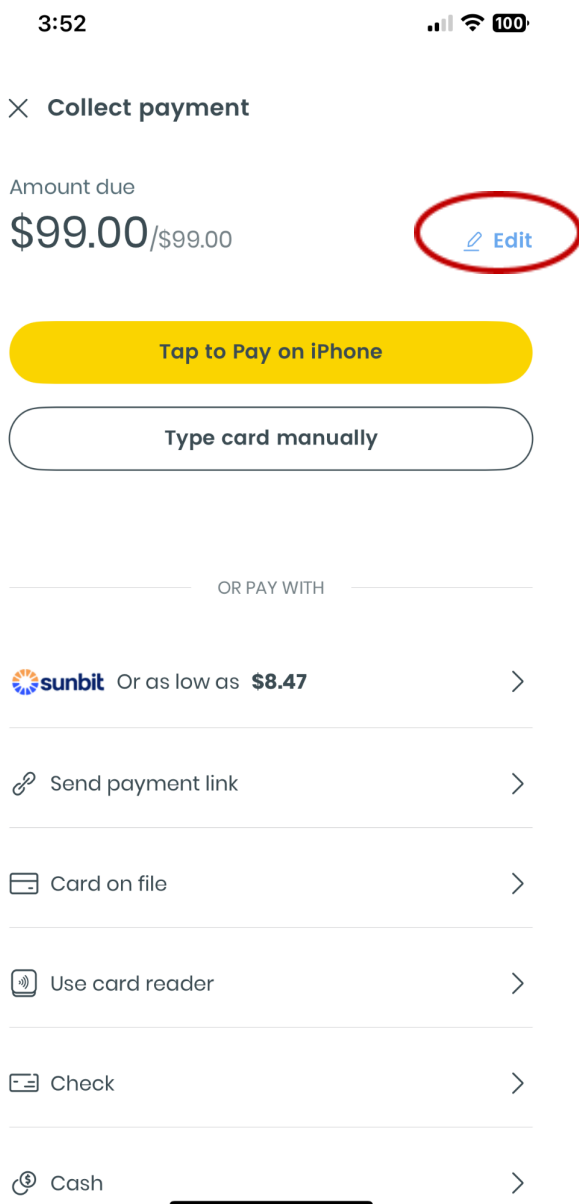
+ Add payment

Signatures

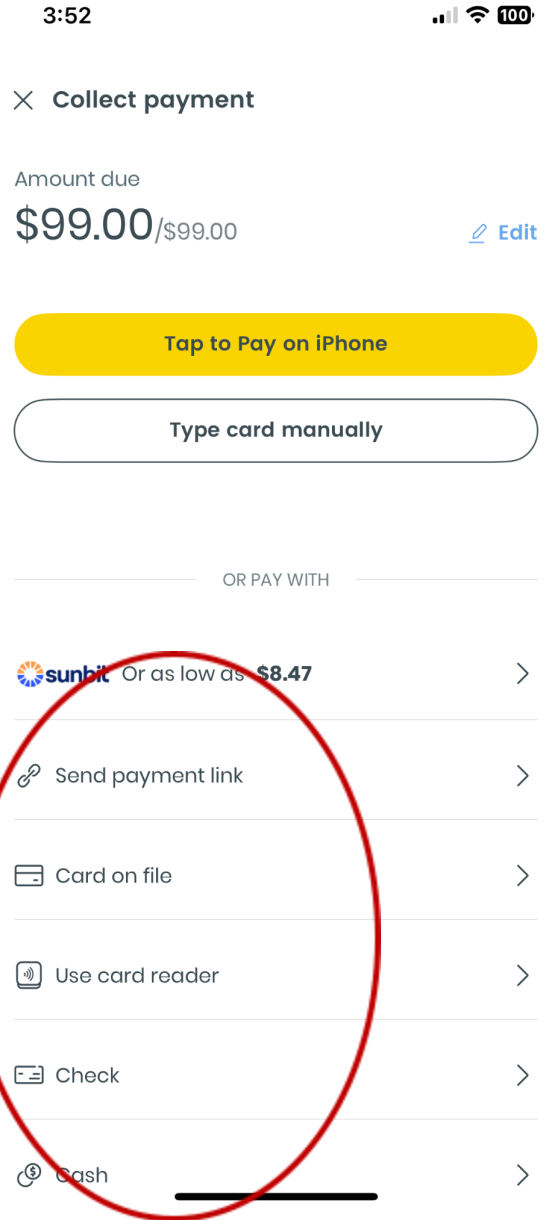
Attachments

Notes (empty)

STEP 11: Check the amount DUE if correct if not Click EDIT to change the price.



STEP 12: Select Payment METHOD



STEP 11: Go back to INVOICE

3:49 📶 100

[< Invoice #485](#) ⋮

**Chris Trujillo (Test Job)**  
801 Marsh Creek Rd apartment 801, Wellsboro,  
Pennsylvania 16901

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Total: \$0.00  
Due: \$0.00  
Invoice date: Sat Mar 7th 2026  
Due on: Fri Mar 13th 2026

[Send invoice](#)

---

✓ Items +



No items added

[+ Add item](#)

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|                |                |
|----------------|----------------|
| Sub total      | \$0.00         |
| Tax rate 0.00% | \$0.00         |
| Discount       | \$0.00 (0.00%) |
| Total          | \$0.00         |

STEP 12: Scroll down, click DETAILS

3:55 📶 100

[< Job #1415](#) [➤](#)

**Details** Finance Timeline

[📍 801 Marsh Creek Rd apartment 801, Well...](#) ⌵

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[📞 \(937\) 829-1507](#) [📞](#) [💬](#)

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**Schedule**

[📅 Fri, Mar 6th 6:30 PM - 8:15 PM](#) ⌵

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**Details**

[🔧 Air Duct Cleaning](#) ➤

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**Job tags**

[🏷️ Google PPC](#) ➤

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**Team**

[👤 Cris Trujillo](#) ➤

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[Show availability](#)

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**Attachments**

[📎 No attachments added](#) ➤

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**Tasks**

[📌 Add task](#) ⌵

### STEP 13: Add BEFORE and AFTER photo

3:56

✕ Edit details

Need cleaning for mour ducts.

Extra Info

Inspection Fee

Before Photos

You can choose up to 5 files

+

After Photos

You can choose up to 5 files

+

Did you order materials

Communication

Update job