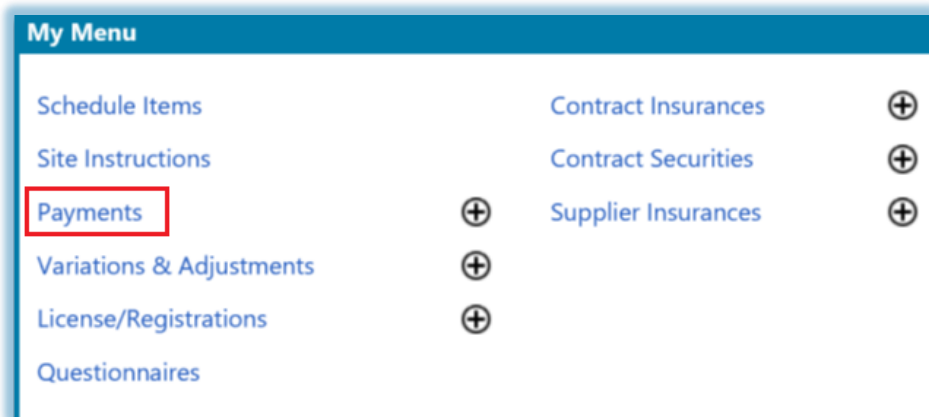


## Submit Claim and Invoice

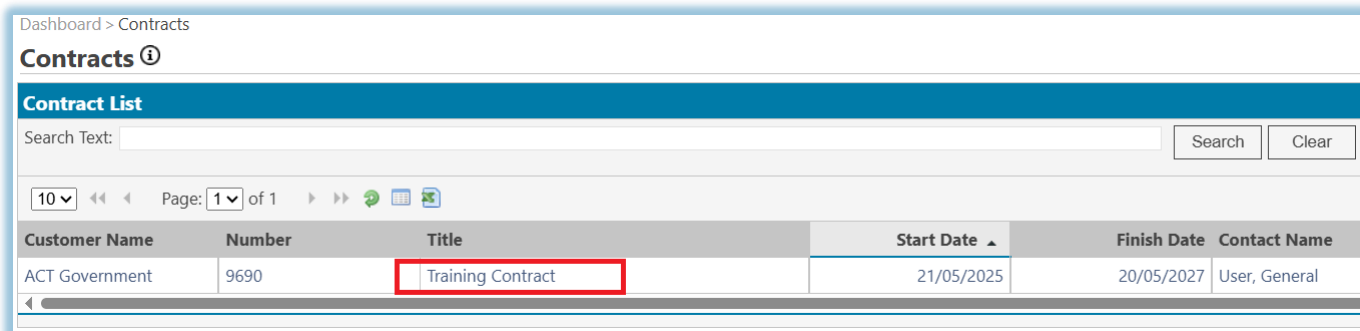
### Purpose

This process outlines to the steps required to submit a claim and invoice.

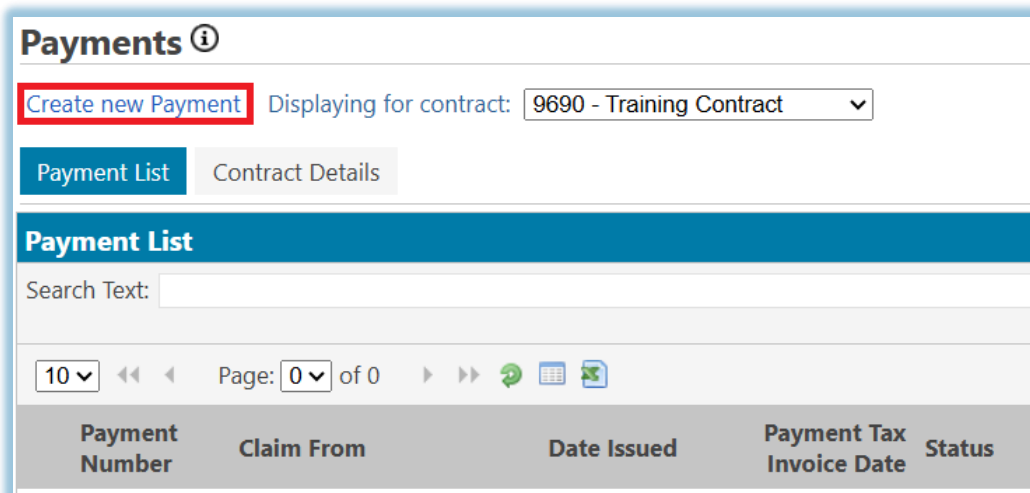
1. Select **Payments** from the My Menu window.



2. Your list of active contracts will be displayed in the below table. Select the relevant contract from the list.



3. Ensure the correct contract is selected from the dropdown list. Click **Create new Payment**.



4. Enter the following payment details:
  - a. **Invoice Number:** enter the invoice number, ensuring that it matches the physical invoice.
  - b. **Claim From:** the date you are issuing the payment claim to the client.
  - c. **Date Issued:** the date you issued the payment.
  - d. **Payment Tax Invoice Date:** the date on the physical invoice.
  - e. **Comments:** include a description or details specific to the payment.
  - f. **Attachments:** attach a copy of the invoice and any other relevant documentation here.

Dashboard > Payments > Create Contract Payment

### Create Contract Payment ⓘ

Save Submit Cancel

Selected Contract: **9690 - Training Contract**

Payment Number: Auto-Generated

Invoice Number: 12345

Claim From: 21/05/2025 📅

Date Issued: 21/05/2025 📅

Payment Tax Invoice Date: 19/05/2025 📅

Comments: Enter invoice description here.

Attachments: [V9 - TEST Invoice 19-05-25.docx](#)

No file chosen

\* Max file size allowed is 524.00MB. File types allowed: gif, jpg, jpeg, png, 7z, zip, pdf, doc, docx, xls, xlsx.

5. Click the **Add items from schedule** link.

## Create Contract Payment ⓘ

Save

Submit

Cancel

Selected Contract: **9690 - Training Contract**

Payment Number: Auto-Generated

Invoice Number: **12345**

Claim From: 21/05/2025

Date Issued: 21/05/2025

Payment Tax Invoice Date: 19/05/2025

Comments: Enter invoice description here.

Attachments:

V9 - TEST Invoice 19-05-25.docx

No file chosen

\* Max file size allowed is 524.00MB. File types allowed: gif, jpg, jpeg, png, 7z, zip, pdf, doc, docx

Add new item | **Add items from schedule** | Import schedule items

Item ID

Category

Comments

Description ▲

Invoice/Reference  
No.

6. Select the **items** you wish to claim against by selecting the check boxes, then click **Add**.

### Add Schedule Items

Add
Cancel

Selected Contract: **9690 - Training Contract**

Payment Number: Auto-Generated

Date Issued: 2025-05-21

Search Text:

10 ▾ ◀ ◀ Page: 1 ▾ of 1 ▶ ▶ ↻

Item No	Comments	Item	Reference No.	Category
<input checked="" type="checkbox"/>		Original Contraction Cost	CONSTRUCTION	CONSTRUCTION
<input checked="" type="checkbox"/>		Variation 1		CONSTRUCTION

7. The selected items will be added to the claim. Next, select an item from the table.

### Create Contract Payment

Save Submit Cancel

Total: 2.00

Tax: 0.20

Grand Total (Inc. Tax): 2.20

Selected Contract: **9690 - Training Contract**

Payment Number: Auto-Generated

Invoice Number:

Claim From:

Date Issued:

Payment Tax Invoice Date:

Comments:

Attachments:  ✘

Choose file | No file chosen

\* Max file size allowed is 524.00MB. File types allowed: gif, jpeg, png, 7z, zip, pdf, doc, docx, xls.

Add new item | Add items from schedule | Import schedule items

Item ID	Category	Comments	Description	Invoice/Reference No.	Quantity	Rate	Total	Tax	Grand
<span style="color: red; font-weight: bold;">✘</span> 1			Original Contraction Cost	CONSTRUCTION	1	\$1.00	\$1.00	\$0.10	
<span style="color: red; font-weight: bold;">✘</span> 2			Variation 1		1	\$1.00	\$1.00	\$0.10	

- Enter the required **Quantity** (amount being claimed) and click **Save**. If there are multiple items, select the next item and repeat.

### Item Details

Item ID:

Comments:

Description:

Invoice/Reference No.:

Unit:

Qty Remaining:

Quantity:

Rate:

Total:

Tax:

Grand Total (Inc. Tax):

- Review all invoice details and ensure that the **total values** are correct. Once review, **Click Submit**.

Dashboard > Payments > Create Contract Payment

### Create Contract Payment Total: 16,000.00 Tax: 1,600.00 Grand Total (Inc. Tax): 17,600.00

Save  Cancel

Selected Contract: **9690 - Training Contract**

Payment Number: Auto-Generated

Invoice Number:

Claim From:

Date Issued:

Payment Tax Invoice Date:

Comments:

Attachments:   No file chosen ✘

\* Max file size allowed is 524.00MB. File types allowed: gif, jpeg, png, 7z, zip, pdf, doc, docx, xls, xlsx.

[Add new item](#) | [Add items from schedule](#) | [Import schedule items](#)

Item ID	Category	Comments	Description	Invoice/Reference No.	Unit	Quantity	Rate	Total	Tax	Grand
✘	1		Original Contraction Cost	CONSTRUCTION		11000	\$1.0000	\$11,000.00	\$1,100.00	
✘	2		Variation 1			5000	\$1.0000	\$5,000.00	\$500.00	

10. The invoice will now appear in the table below, showing the status. Once the invoice is approved for payment, you will receive a notification, and the status will update accordingly.

Dashboard > Payments




## Payments ?

Create new Payment    Displaying for contract: **9690 - Training Contract** ▼

**Payment List**    Contract Details

### Payment List

Search Text:

10 ▼    Page: 1 ▼ of 1      

Payment Number	Claim From	Date Issued	Payment Tax Invoice Date	Status	Grand Total (Inc. Tax)
1	21/05/2025	21/05/2025	19/05/2025	In Progress	\$13,200.00