

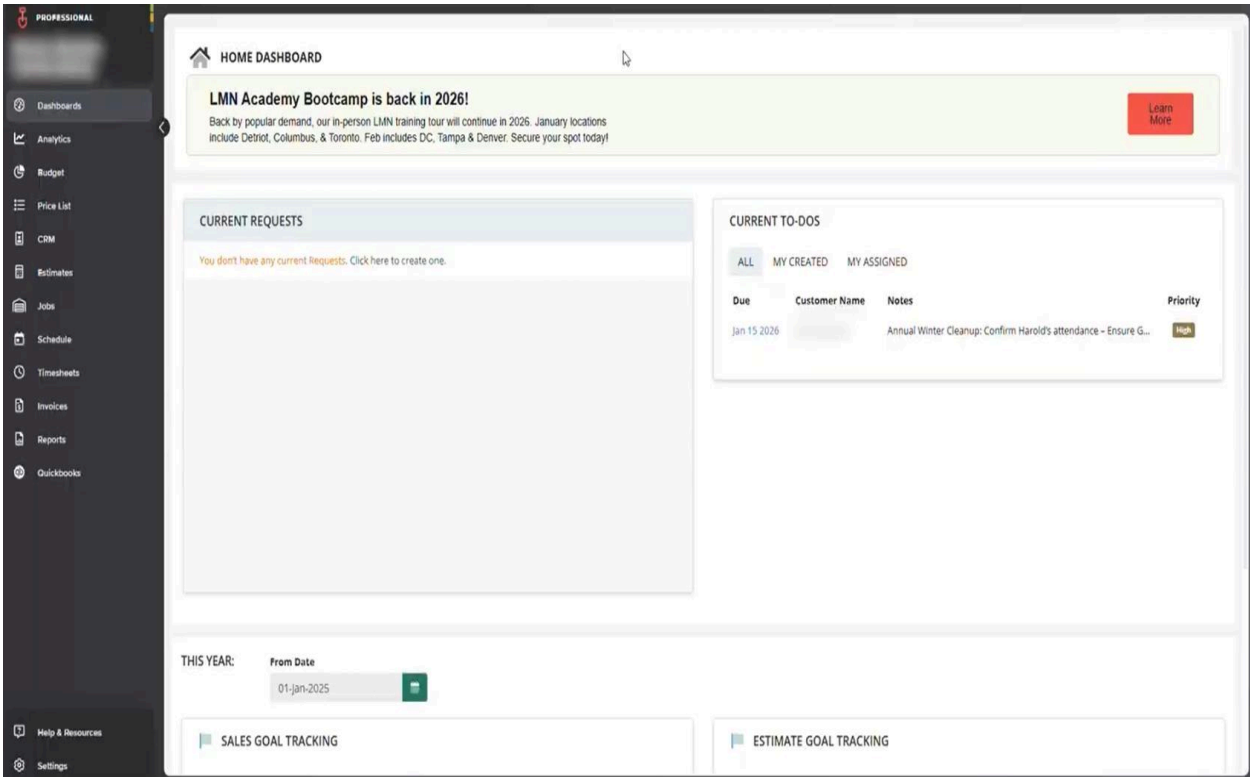
Invoice Generation in LMN

This job aid is designed to guide team members through the standardized process of generating invoices in LMN. By following these steps, users can create accurate invoices, ensure proper approvals, and keep financial records synchronized with accounting systems.

Steps to Generate an Invoice in LMN

Step 1: Log Into LMN

- Sign in to your LMN account using your login credentials. Once logged in, you will be directed to the main dashboard.



Step 2: Open the Job Record

- Navigate to the **Jobs** tab.

PROFESSIONAL

HOME DASHBOARD

LMN Academy Bootcamp is back in 2026!
Back by popular demand, our in-person LMN training tour will continue in 2026. January locations include Detroit, Columbus, & Toronto. Feb includes DC, Tampa & Denver. Secure your spot today!

Learn More

CURRENT REQUESTS

You don't have any current Requests. Click here to create one.

CURRENT TO-DOS

ALL MY CREATED MY ASSIGNED

Due	Customer Name	Notes	Priority
Jan 15 2026		Annual Winter Cleanup: Confirm Harold's attendance - Ensure G...	High

THIS YEAR: From Date 01-Jan-2025

SALES GOAL TRACKING ESTIMATE GOAL TRACKING

- Open the **Job List** and search for the job site by name.

PROFESSIONAL

JOB LIST

Import + New

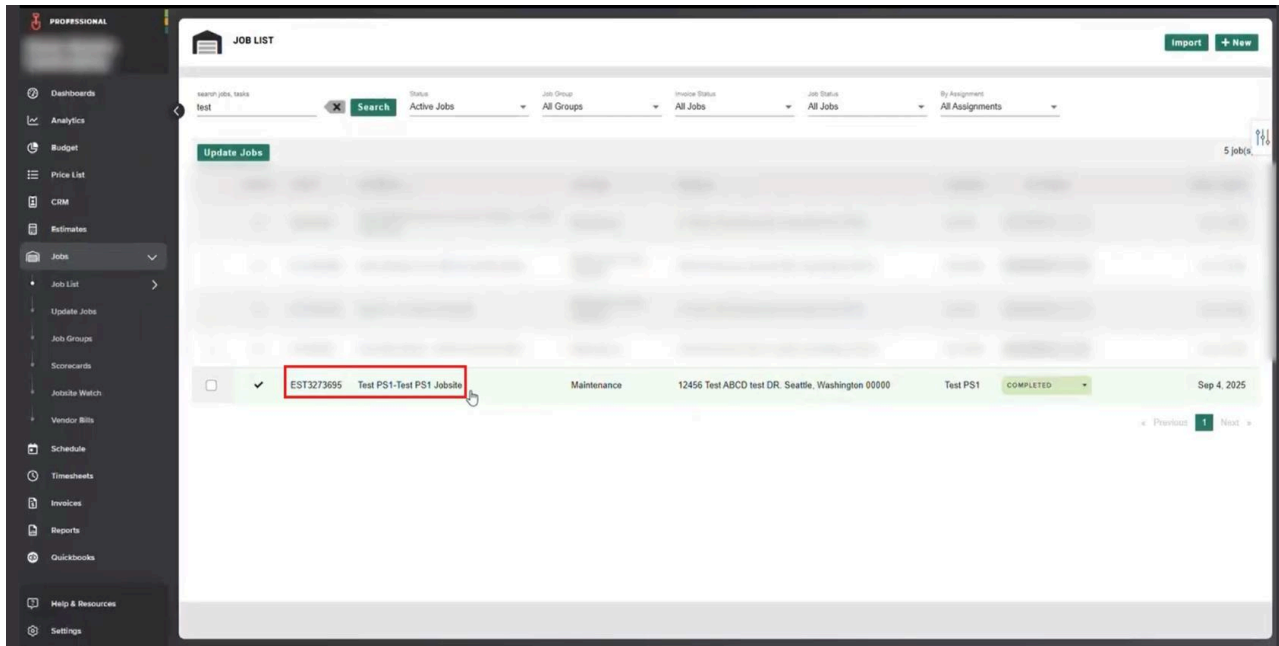
search jobs, tasks test Search Status: Active Jobs Job Group: All Groups Invoice Status: All Jobs Job Status: All Jobs By Assignment: All Assignments

Update Jobs

3 jobs

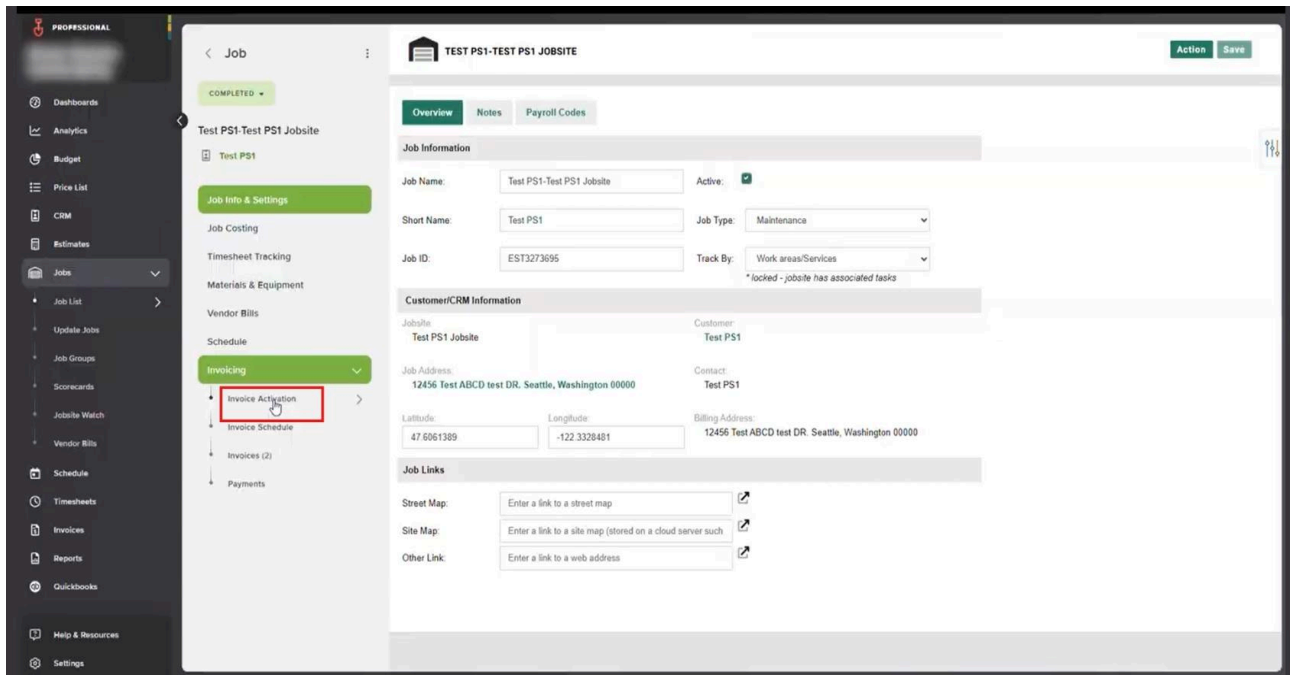
Previous 1 Next

- Click the **Job ID** to open the job record and access the invoicing tools.



Step 3: Access the Invoicing Section

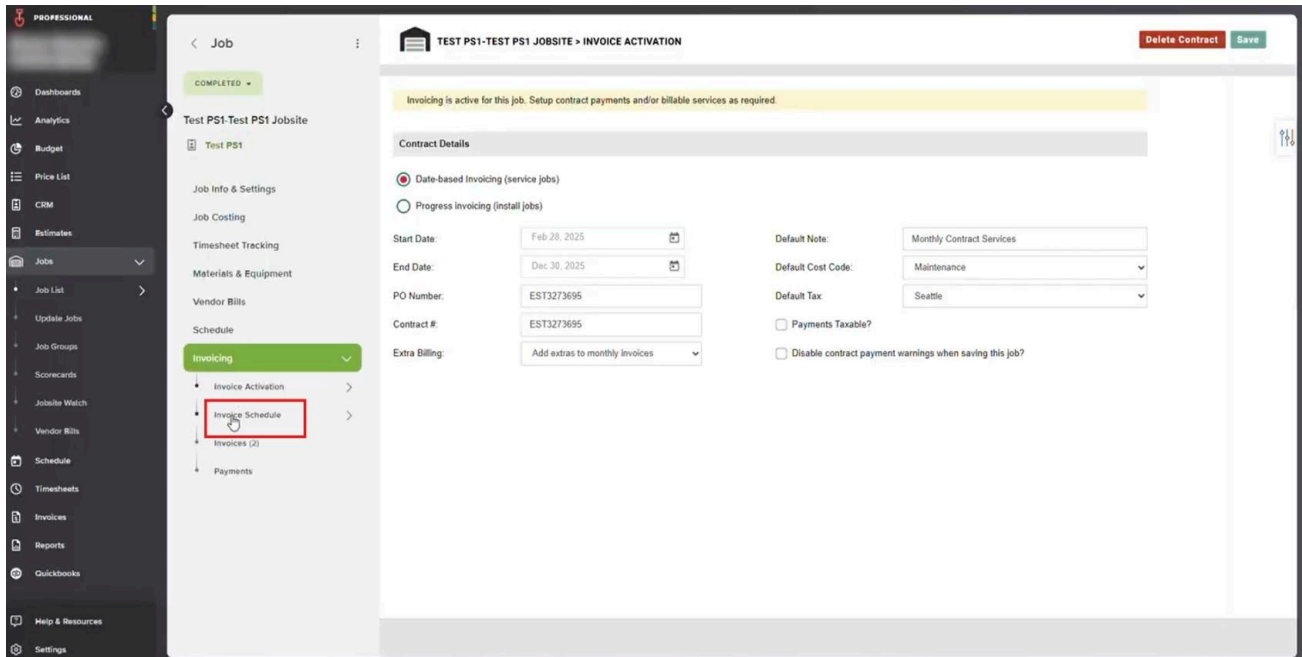
- Inside the job record, locate and open the **Invoicing** section.



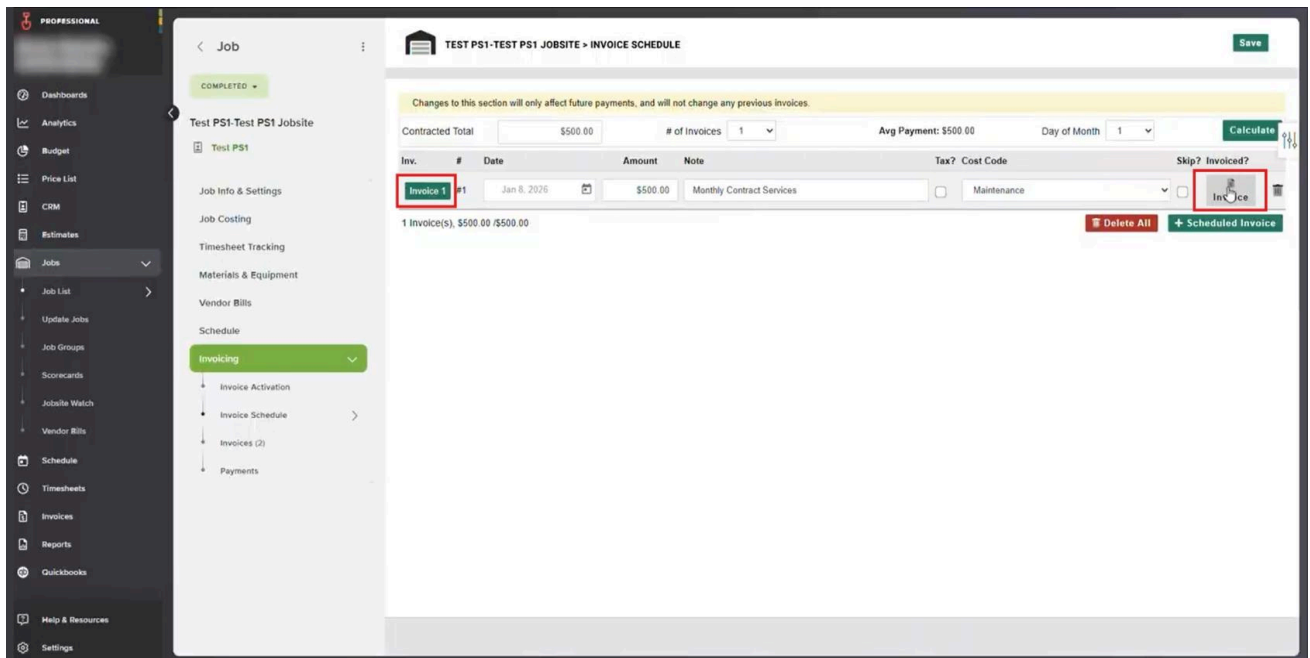
- Enter the contract details to activate the invoice process.

Step 4: Create the Invoice

- Go to the **Invoice Schedule** section.



- Find **Invoice 1** and click the **Invoice** icon to generate the invoice.



- LMN will create the invoice using the linked job and contract information.

Step 5: Review and Update Invoice Details

- After the invoice is created, review all line items, quantities, and pricing.
- Use the **+ New Item** option to add line descriptions or adjust quantities and rates if required.

The screenshot displays the 'INVOICE: INV- 46 | TEST PS1' interface. At the top, it shows 'Pending \$500.00' and buttons for 'More', '\$ Add Payment', 'Send Invoice', and 'Save'. The main area is divided into several sections: Billing Address, Job Address, Invoice Date (Jan 8, 2026), Invoice Due Date (Feb 7, 2026), Invoice # (INV- 46), Acct. Invoice #, Generated by (Thu Jan 8, 2026), Account Manager (Unassigned), Salesperson, and Division (Maintenance). Below these are fields for Contract # (EST3273695) and PO # (EST3273695). A table lists line items with columns for #, Line Description, Crew Lead, Cost Code, Qty, Rate, Amount, and Tax. The first item is '1 Monthly Contract Services' with a quantity of 1.00, rate of \$500.00, and amount of \$500.00. A '+ New Item' button is highlighted with a red box. Below the table, there are sections for '0 Payment(s)' and 'Outstanding Balance' of \$500.00.

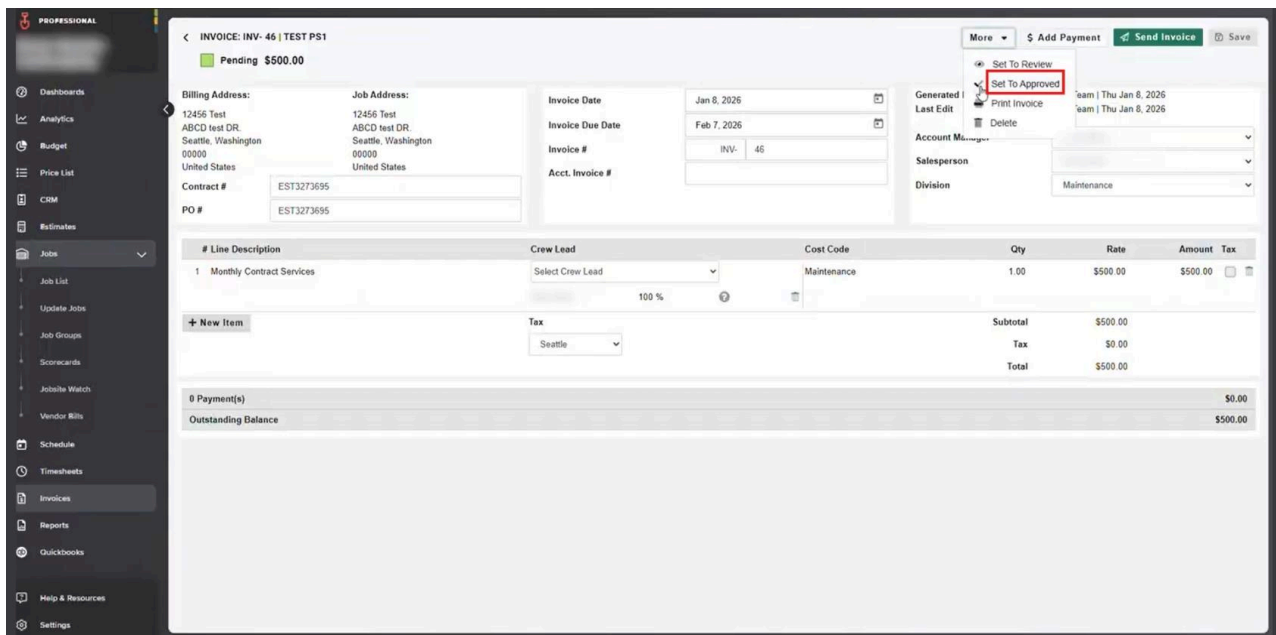
- Confirm that all details match the job scope and contract terms.

Step 6: Approve the Invoice

- When the invoice is accurate and complete, open **More Actions**.

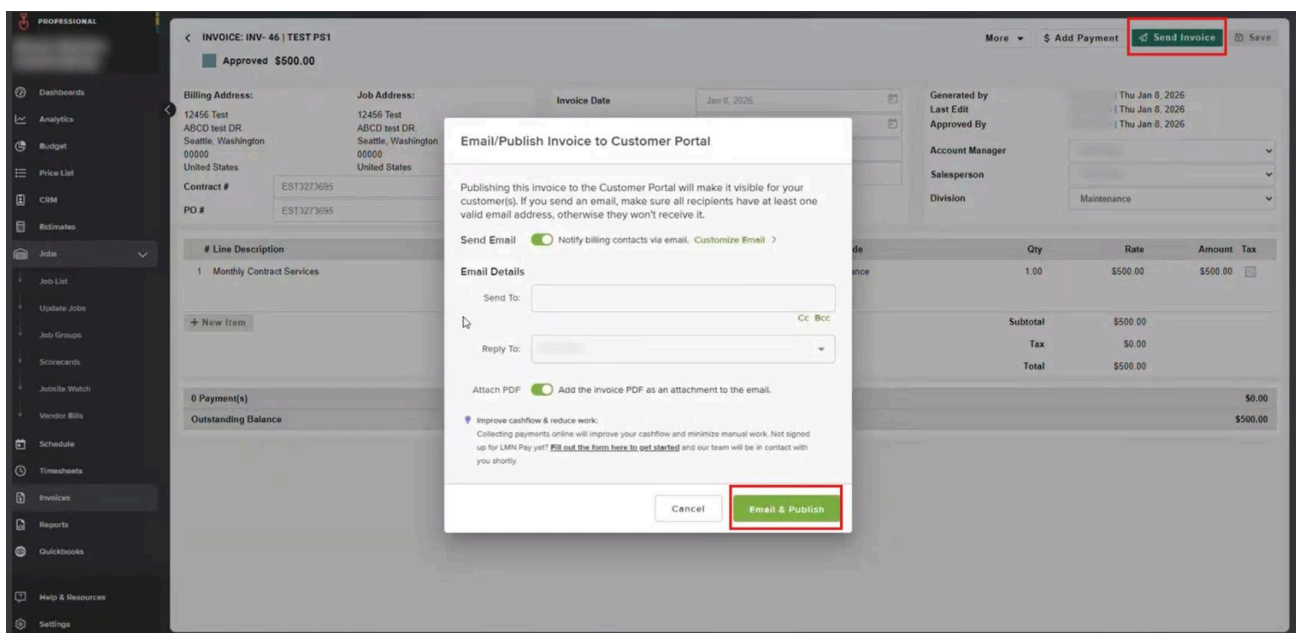
This screenshot is identical to the previous one, but with the 'More' button in the top right corner highlighted with a red box. The rest of the interface, including the invoice details, table, and payment information, remains the same.

- Select **Set to Approved** to finalize the invoice for client delivery and accounting processing.



Step 7: Send or Print the Invoice

- Once approved, use the **Send Invoice** feature to publish and deliver the invoice to the client.



- If a physical copy is required, the invoice can also be printed directly from LMN.

When invoicing is handled inside LMN, billing cycles move faster, reporting stays accurate, and cash flow becomes more predictable. Over time, this leads to fewer disputes, smoother financial operations, and better overall business performance.