



CONSTRUCTION INVOICING

Prepare with confidence. Check before you issue.

A practical companion to the ISH Commercial OS Academy. Follow a task, practise it in the demonstration workspace, then return here when you need a reminder.

The working routine

Start with agreed facts. Create the draft. Adjust deliberately. Ask for help. Check the saved PDF. Issue after review.

Find the task you need

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Training uses example people, prices and banking details. Practice in a demonstration workspace. Use your organisation's approved commercial information for actual work. The review videos and hosted Academy are still being completed.



Identify the workspace and prepare the facts before asking AI.

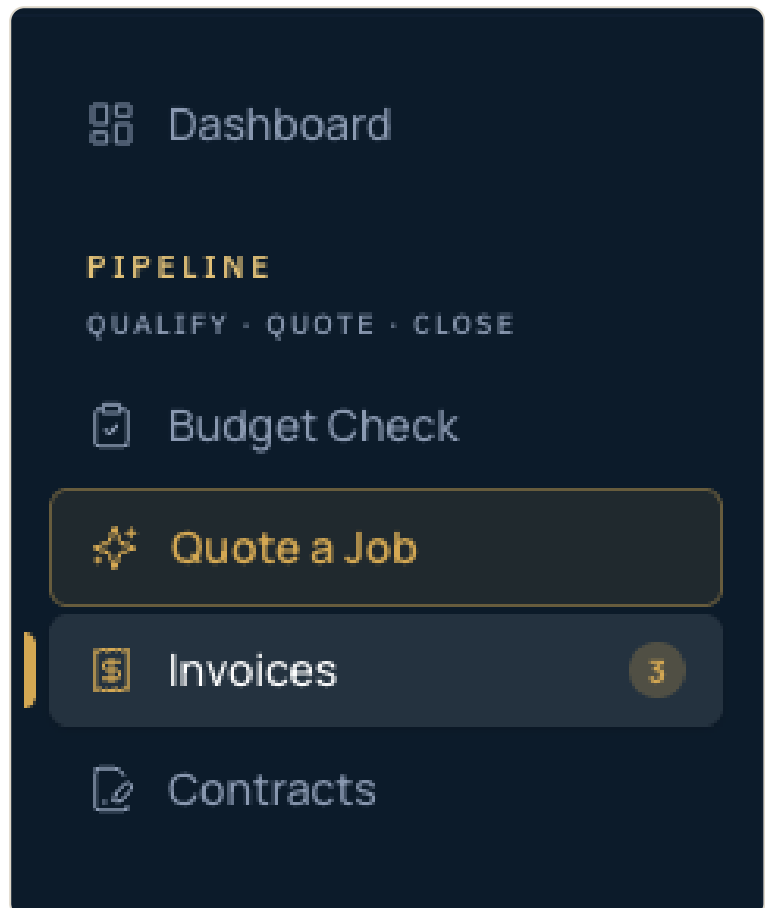
Find your way around

1. Use the account supplied by your organisation. Confirm you are in the correct company workspace.
2. Have the customer, project, approved scope, quantities and supporting quotation ready.
3. Use Invoices for existing documents and Ask Lerato for contextual assistance.

Pause and practise

Open your workspace and identify the customer, project and invoice you want to work on.

Watch lesson 01 for the complete demonstration. Use this page to find the controls and recall the steps.



Use Invoices for your documents. Quote a Job opens the AI-assisted quotation flow.



Create a draft from an accepted quotation and verify its customer, project and total.

Start from the agreed job

1. Choose Invoices, then Create invoice. Find and select the accepted quotation.
2. Check the source panel, then choose Create draft invoice to open the editor.
3. Confirm customer, billing address, reference, due date and Saved status.
4. Compare the project, work items and total with the agreed quotation.

Pause and practise

Create a draft from an accepted demonstration quotation. Check its customer, project and total against the source.

Watch lesson 02 for the complete demonstration. Use this page to find the controls and recall the steps.

2. Check the source

Quotation	DEMO-Q-001
Customer	Example Engineering
Project	Workshop refurbishment
Agreed total	R 13 225,00

Workshop refurbishment: preparation, concrete and masonry repairs, painting and site cleaning.

Review the full quotation

Creating the draft opens the invoice editor. Check customer details, quantities and prices before issuing it.

 **Create draft invoice**

Review the accepted source, then choose Create draft invoice. The total shown is a demonstration amount.



Select, adjust and rearrange without losing the whole document.

Edit the invoice on the page

1. Click a section or work item on the invoice to open its controls.
2. Use Whole page, Fit width or 100% to choose a comfortable view.
3. Rearrange sections using drag or the arrow buttons; use Undo to reverse a change.

Pause and practise

Change a demonstration reference, move Payment notes above Work and prices, then use Undo.

Watch lesson 03 for the complete demonstration. Use this page to find the controls and recall the steps.

On this invoice

- Client & details ↑ ↓
- Project ↑ ↓
- Work & prices ↑ ↓
- Payment notes ↑ ↓
- Totals ↑ ↓

Click a section on the page to adjust it. Drag sections to rearrange.

Page spacing

Comfortable ▼

Logo position

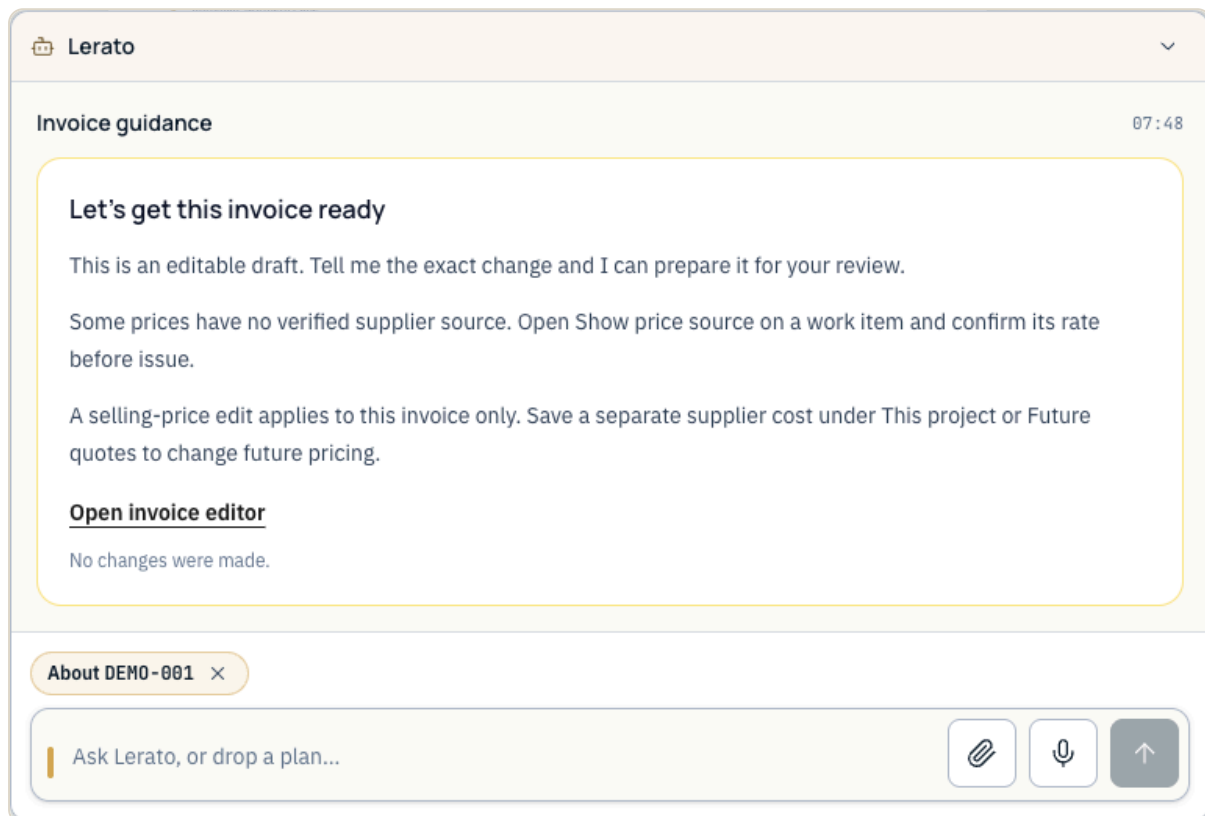
Left ▼

The section arrows and Page spacing controls let you adjust the document layout.



Ask about the active invoice and review a specific proposed correction.

Get useful help from Lerato



Actual Lerato inspection of the demonstration invoice. Invoice guidance explains what needs checking; no change was made.

1. Open Ask Lerato from the invoice so the document context is attached.
2. Explain the difficulty or give an exact change, including the intended amount.
3. Read the proposed change and approve only when it matches your intention.

Pause and practise

Ask: "Check this invoice and explain what I should fix before issuing it."

Watch lesson 04 for the complete demonstration. Use this page to find the controls and recall the steps.



Make an agreed selling-price adjustment with a clear reason.

Change a price on this invoice

1. Select the correct work item and inspect its quantity and pricing unit.
2. Keep the scope set to This invoice only for a document-specific adjustment.
3. Enter the agreed price and a reason, then check subtotal, VAT and total.

Pause and practise

On a demonstration invoice, adjust one agreed rate, add a reason and verify the new total.

Watch lesson 05 for the complete demonstration. Use this page to find the controls and recall the steps.

ADJUST

Work item

Description

Site preparation and protection

Quantity (item)

1.000

Price per item, excluding VAT

1450

Save price changes for

This invoice only

Reason or supplier reference

Demonstration agreed adjustment

► Show price source

☆ Ask Lerato

This invoice only keeps the selling-price correction on this document. Record a reason for the change.



Publish a sourced project or company cost without changing old documents.

Save costs for future work

1. An authorised manager selects This project or Future quotes.
2. Choose the catalogue item, correct unit, region and supplier cost.
3. Record the source, effective date and optional expiry; review the scope before saving.

Pause and practise

Prepare a sourced cost update and identify whether it belongs to one project or the company.

Watch lesson 06 for the complete demonstration. Use this page to find the controls and recall the steps.

Save price changes for

This project

Save the supplier cost below. Future quotes add their own approved markup. The selling price above stays on this invoice.

Catalogue item

Demonstration material (each)

Price region

Northern Cape

Cost per each, excluding VAT

1100

Supplier

Example Supplier

Quotation or source reference

DEMO-COST-01

Effective from

2026/09/09

Valid until (optional)

yyyy/mm/dd

Save project cost

A separate project cost form: item, region, source and dates remain explicit. This example form was not published.

**ISH**

Isgcawu Somnotho Holdings (Pty) Ltd

COMMERCIAL OS

LESSON 07 / REVIEW AND FINISH

Review the complete PDF before issuing a protected document.

Check, preview and issue

[← Back to invoices](#)

+27...

Home > Invoices > DEMO-045

[Edit invoice](#)[Discuss with Lerato](#)[Print](#)[Download PDF](#)[Web Link](#)[WhatsApp](#)[Email](#)

Document Preview

DEMO-045 · Example Engineering

Web Link: To enable this channel, run the API with production confi

WhatsApp: To enable this channel, run the API with production con

Email: To enable this channel, run the API with production config an



ISH · WORKSPACE
DEMO

TAX INVOICE

DEMO-045
DRAFT
CONSTRUCTION

BILL TO
Example Engineering
Example Engineering (Pty) Ltd
2 Sample Street, Kuruman
client@example.test

FROM
Example Construction (Pty) Ltd
1 Demonstration Road, Kuruman,
Northern Cape

INVOICE DETAILS

Issued	2026-09-09
Due	2026-10-09
Terms	30 days

PROJECT
Workshop refurbishment
Kuruman, Northern Cape

DRAFT

NO.	DESCRIPTION	QTY	UNIT	RATE	TOTAL
1	Site preparation and protection	1.000	item	R 1,250.00	R 1,250.00
2	Concrete base repair — measured work	12.000	m2	R 210.00	R 2,520.00
3	Masonry repair to workshop opening	8.000	m2	R 325.00	R 2,600.00
4	Surface preparation and two-coat painting	48.000	m2	R 85.00	R 4,080.00
5	Waste removal and site cleaning	1.000	item	R 900.00	R 900.00
6	Site preparation and protection	1.000	item	R 1,250.00	R 1,250.00

Open Document Preview and Download PDF. Inspect every PDF page before using the approved issue workflow.

1. Confirm the saved customer details, scope, quantities, references and dates.
2. Open Preview and download; inspect every PDF page, including totals and banking.
3. Use the approved issue/send workflow only after review; issued financial details are locked.

Pause and practise

Inspect every page of the long demonstration invoice and locate its final total and banking details.

Watch lesson 07 for the complete demonstration. Use this page to find the controls and recall the steps.



Understand save messages and send actionable feedback.

Recover, continue and report a problem

Add a reason to save the price change for Site preparation and protection. Add reason

Your unsaved edits were recovered on this device.

An actual recovery notice and missing-price-reason message from the demonstration workspace.

1. Read the save status and complete missing reasons or fields.
2. After interruption, inspect recovered edits and the current saved version before continuing.
3. Use lesson feedback to state your aim, the step that failed and the message you saw.

Pause and practise

Read an unsaved-edit message and describe the next safe action before changing anything.

Watch lesson 08 for the complete demonstration. Use this page to find the controls and recall the steps.