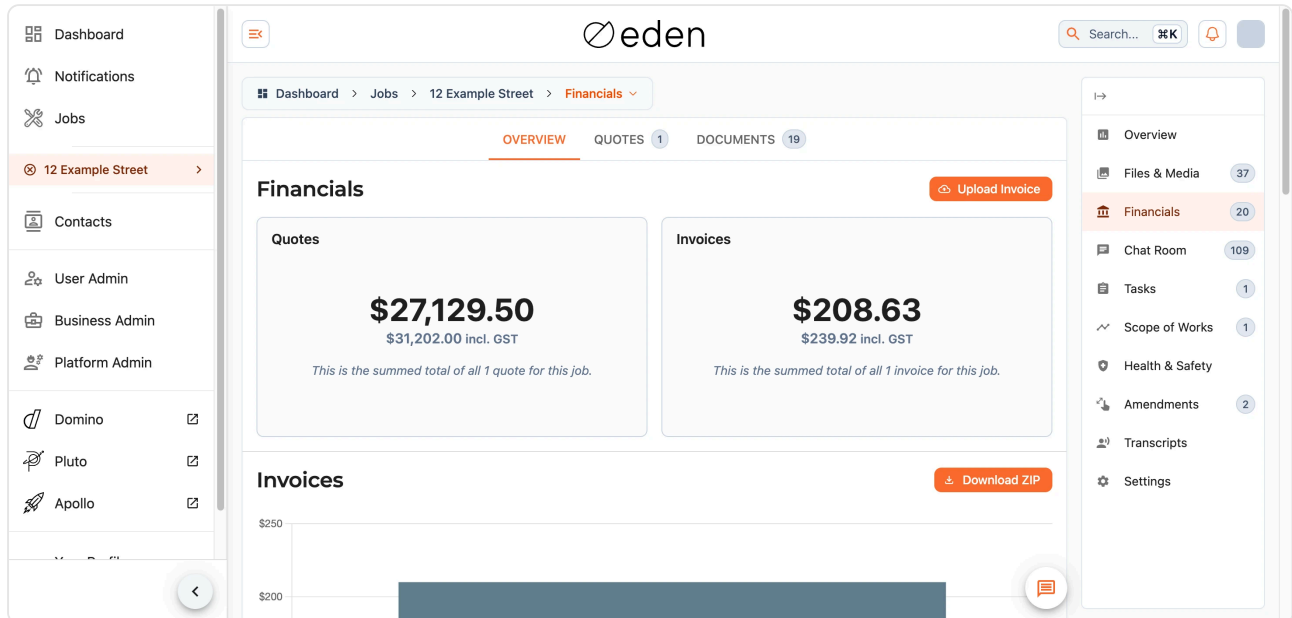


Financials

🕒 EST. 2 MINUTE READING TIME

The **Financials** section brings together the money side of a job - the quotes prepared for the work and the invoices raised against it. You will find it in a job's [navigation menu](#), split across three tabs: **Overview**, **Quotes**, and **Documents**. As with the rest of a job, what you can see here depends on the permissions you have been given.



The financials overview for a job.

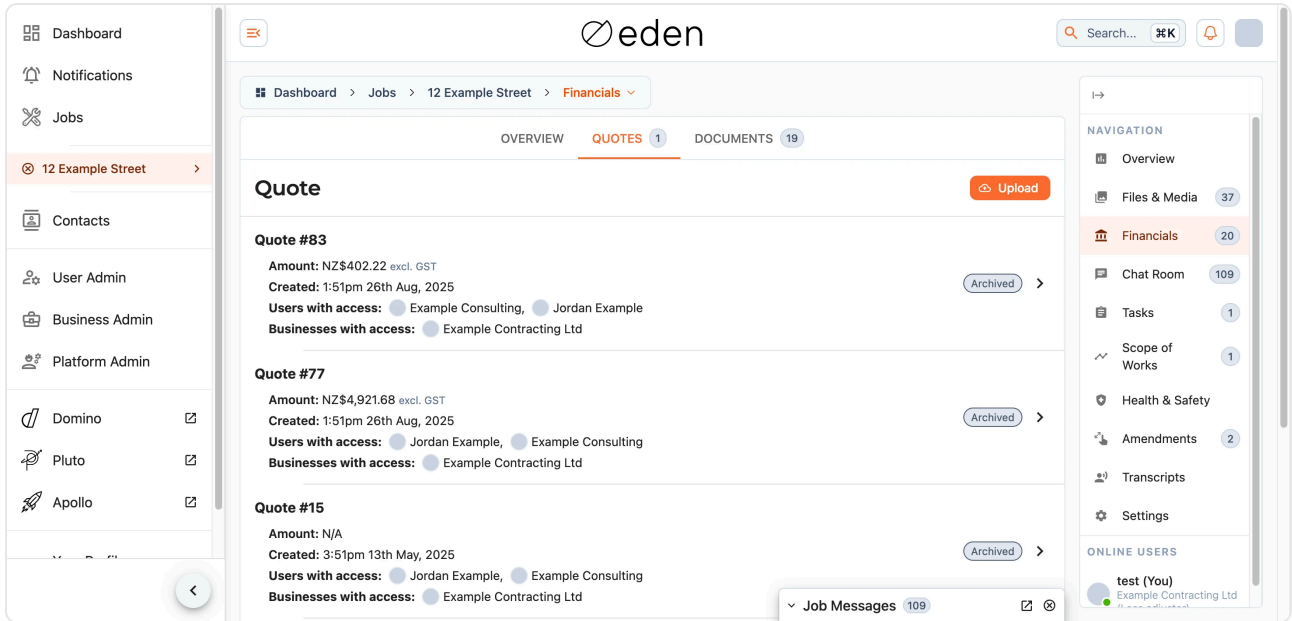
Overview

The overview gives you the headline figures at a glance: the combined total of the job's quotes and the combined total of its invoices, each shown both before and with GST. Beneath the summary cards, a chart and supporting lists break the figures down so you can see how they add up.

If you have permission to add financial documents, the **Upload Invoice** button lets you bring one in from here.

Quotes

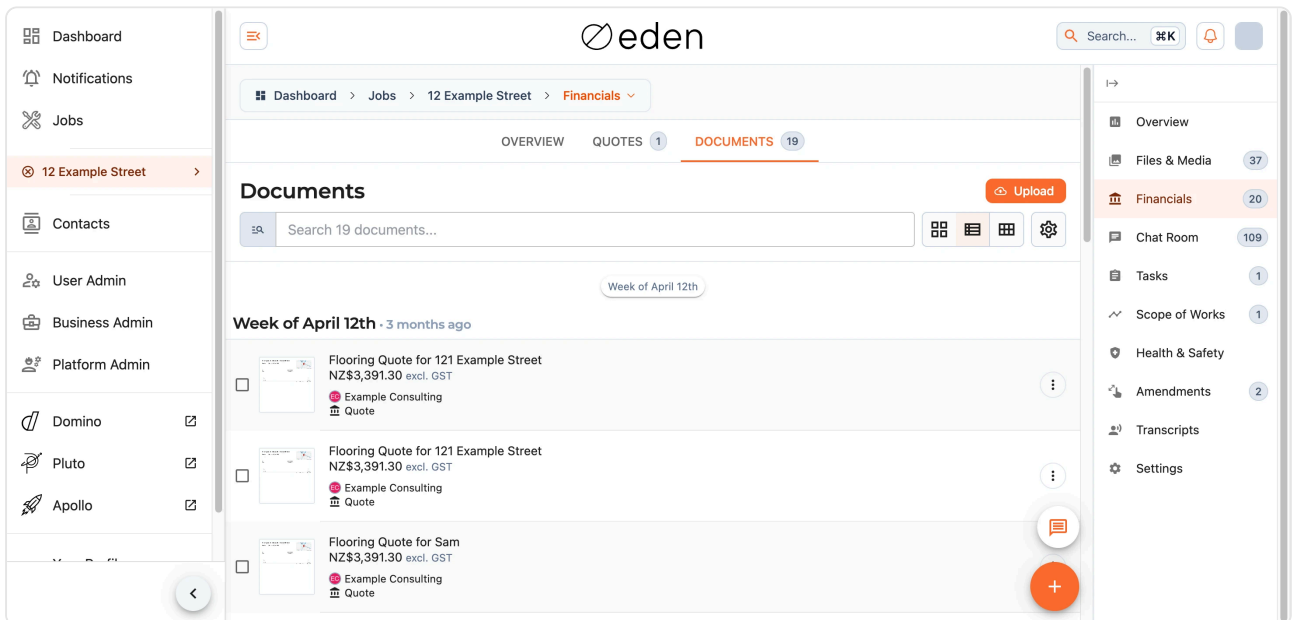
The **Quotes** tab lists the quotes prepared for the job, each showing its current status - **Pending**, **Approved**, **Rejected**, or **Archived**. Select a quote to open it in full.



If you have permission, you can upload a quote (as a PDF) using the **Upload** button, and update a quote's status from its actions. Marking a quote as approved is what feeds it into the totals on the overview.

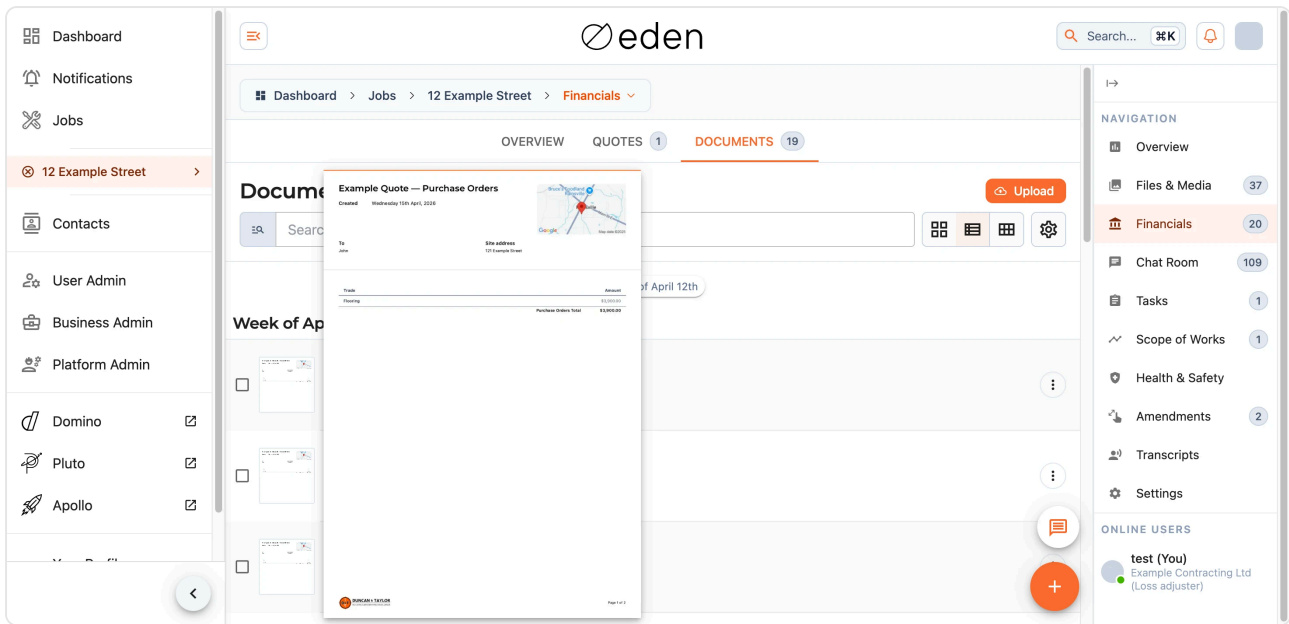
Documents

The **Documents** tab is where the job's financial documents - invoices and the like - are stored. It works much like the [Files & Media](#) section: you can search, filter, and switch layouts to find what you need, select documents for bulk actions, and upload new ones if you have permission.



Viewing a Document

Selecting a quote or document opens a full-screen preview. Alongside the original file, *EDEN* shows the detail it has read from it - the individual line items, totals, and any terms - so you can review the figures without having to pore over the paperwork itself. You can export the line items if you need them elsewhere.



Note: the figures shown across this section are drawn from the documents on the job and are there to give you a clear running picture. For anything to do with billing or a discrepancy, please get in touch with us at support@samconsulting.co.nz.