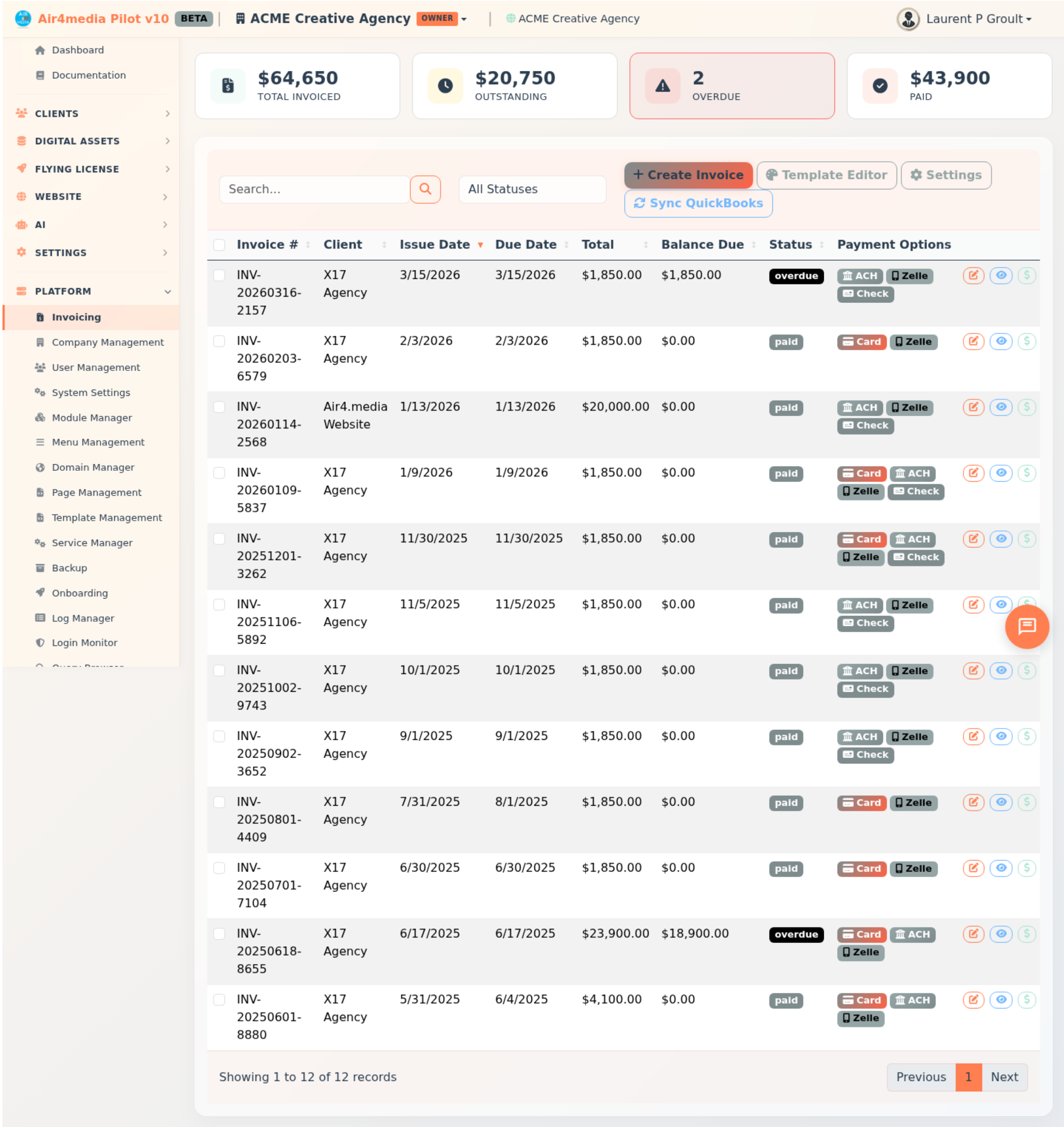

Invoicing

Create, send, and track professional invoices — from first draft to final payment — with online payment collection, full payment history, and your own branded invoice design.

Key Features

- **Invoice Creation**: Add line items, quantities, rates, and taxes; totals calculate in real time
- **Online Payments**: Accept credit cards via Stripe — clients pay directly from their invoice

link

- **Multiple Payment Methods**: Offer Stripe, ACH, Zelle, check, or wire transfer on any invoice
- **Public Invoice Link**: Every invoice gets a secure shareable link — clients view and pay without logging in
- **Status Tracking**: Invoices move through Draft → Sent → Partially Paid → Paid automatically, or update manually
- **Payment History**: See all payments per invoice; edit manual entries or issue Stripe refunds directly
- **Partial Payments**: Record multiple payments — the balance updates automatically after each one
- **Template Editor**: Customize your invoice with your logo, brand colors, payment terms, and footer text
- **QuickBooks Export**: Export selected invoices to QuickBooks in one click
- **Duplicate & Reuse**: Clone any invoice instantly, or build line items from your saved products library
- **PDF Download**: Download or print any invoice as a PDF
- **Recurring Invoices**: Set invoices to repeat on a schedule and manage them from the recurring view
- **Dashboard Stats**: Total invoiced, outstanding balance, overdue count, and paid total at a glance

How to Use

Create an Invoice

1. Click **Create Invoice**
2. Select a client and set the issue and due dates
3. Add line items — description, quantity, and rate; the total calculates automatically
4. Choose which payment methods to offer (Stripe, ACH, Zelle, check, wire)
5. Click **Save** to store as a draft

Send an Invoice

1. Open an invoice and click **Send**
2. Add recipients — contacts auto-suggest as you type (To, CC, BCC)
3. Optionally edit the subject and add a personal note
4. Click **Send Invoice** — your client receives an email with a "View & Pay Invoice" button

Record a Payment

1. Click **Record Payment** on any sent invoice
2. Enter the amount, payment method, and date; save
3. The balance updates automatically — status changes to Paid when settled in full

View Payments & Issue Refunds

1. Click **Payments** on any invoice to open the payment history
2. Edit manual entries or delete them as needed
3. For Stripe payments, click **Refund**, enter the amount and reason, and confirm

Customize Your Invoice Design

1. Click **Template Editor** in the toolbar
2. Upload your logo, set your brand colors, and fill in your company details
3. Add payment terms and a footer note; save — all invoices update immediately

Tips

- Drafts are invisible to clients — finalize before sending
- Use **Duplicate** from the row menu to clone an invoice and avoid re-entering line items
- Select multiple invoices to batch-send emails, export to QuickBooks, or delete at once
- Use **Mark as Sent** or **Mark as Draft** from the row menu to adjust status manually
- The **Overdue** stat turns red when invoices are past due — click it to filter the list
- Only draft or cancelled invoices can be permanently deleted