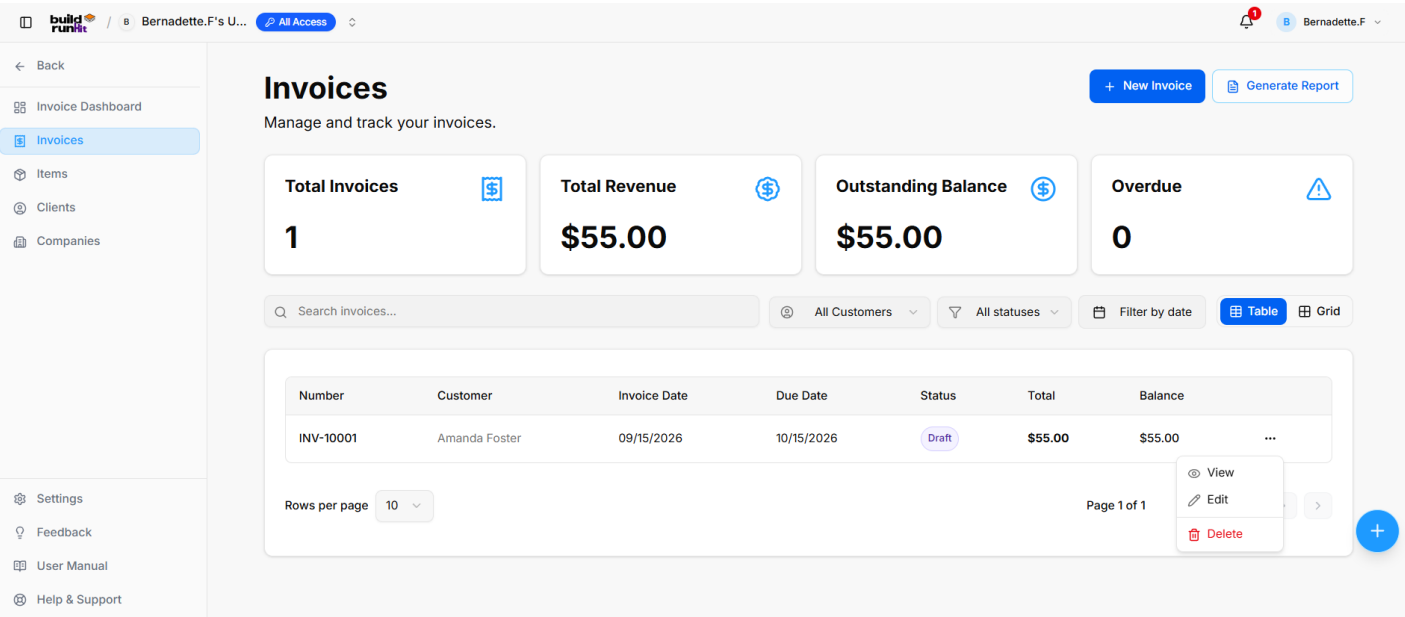


BuildRunKit Invoices: Invoices Sub-Section

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The **Invoices** sub-section provides central management for creating, tracking, filtering, and reporting on all customer billing statements and payment statuses.

Invoice Summary Metrics

Top KPI cards display key billing breakdown totals:

- **Total Invoices:** Tracks the overall number of registered invoice records.
- **Total Revenue:** Displays total gross revenue collected across paid invoices.
- **Outstanding Balance:** Displays total unpaid balances across active invoices.
- **Overdue:** Highlights past-due invoices requiring immediate collection.

Directory Controls & Search Bar

- **Search invoices...**: Global filter input for locating records by number, customer, or details keywords.
- **All Customers**: Dropdown menu to filter records by specific client.
- **All statuses**: Dropdown menu to filter records by status (*Draft, Sent, Paid, Overdue*).
- **Filter by date**: Date picker control to isolate billing records within specific date ranges.
- **View Switcher**: Toggle viewing modes between **Table** (list layout) and **Grid** (card layout).
- **Rows per page**: Dropdown selector to control row density per page (e.g., 10 rows).
- **Pagination**: Standard directional controls to step through invoice pages.

Invoices Table Data Columns

- **Number**: Unique system invoice tracking code.
- **Customer**: Name of the billed client or organization.
- **Invoice Date**: Date of invoice issuance.
- **Due Date**: Payment deadline date.
- **Status**: Badge displaying current state.
- **Total**: Full invoice amount billed.
- **Balance**: Remaining unpaid balance due.

Row Actions Menu ()

Clicking the three dots icon on any invoice row displays quick record management actions:

- **View**: Opens the dedicated invoice preview and line item details.
- **Edit**: Opens the setup editor to update billing details, line items, or customer assignment.
- **Delete**: Removes the invoice record from the Invoices directory.

Header & Action Buttons

- **+ New Invoice**: Direct action button to open the invoice setup modal.
- **Generate Report**: Opens the **Invoices Report** export modal:
 - **Export Count**: Displays total targeted invoice records (e.g., *Exporting 1 records*).
 - **Export Format Options**: Allows instant downloads via **Export as PDF** or **Export as CSV**.

 **Invoices Report**

×

Generate a report for the Invoices data.

Exporting 1 records

Export format

 Export as PDF

 Export as CSV

BuildRunKit Invoices: Creating a New Invoice

←

New Invoice

Create Invoice

Fill in the invoice details below.

Invoice Details

Invoice Number

INV-10002

Customer *

Select a contact

Invoice Date *

September 15th, 2026

Payment Terms *

Net 30

Due Date *

October 15th, 2026

Tax Rate (%)

0

Status

Draft

Line Items

+ Add item

Item	Description	Qty	Unit Price	Taxable	Total
Custom item	Description	1	0	☒	\$0.00
Subtotal					\$0.00
Tax (0.00%)					\$0.00
Total					\$0.00

The **Create Invoice** view provides a setup interface for generating custom client invoices, configuring payment terms, applying tax rates, and adding line items.

Invoice Details Panel

- **Invoice Number:** Auto-generated tracking code (e.g., *INV-10002*).
- **Customer *:** Required dropdown selector to assign a contact profile (*Select a contact*).
- **Invoice Date *:** Date picker field for the issue date (e.g., *September 15th, 2026*).
- **Payment Terms *:** Dropdown selector for payment terms (e.g., *Net 30*).
- **Due Date *:** Date picker field for the payment deadline (e.g., *October 15th, 2026*).
- **Tax Rate (%):** Numeric input field to specify applicable tax percentage (e.g.,).
- **Status:** Dropdown selector to set the initial state (*Draft*).

Line Items Panel

- **+ Add item:** Action button to add additional row items to the invoice.
- **Item Table Columns & Inputs:**
 - **Item:** Dropdown selector to choose a pre-saved item or custom entry (*Custom item*).
 - **Description:** Text field for line item details or notes.
 - **Qty:** Numeric input for quantity ordered (e.g.,).
 - **Unit Price:** Numeric input for price per unit (e.g.,).
 - **Taxable:** Checkbox toggle to apply tax to the line item.
 - **Total:** Calculated row total (e.g., *\$0.00*).
 - **Delete (Trash Icon):** Action button to remove the line item row.
- **Totals Summary:**
 - **Subtotal:** Calculated sum of all line items before tax (e.g., *\$0.00*).
 - **Tax (0.00%):** Calculated tax amount based on selected rate (e.g., *\$0.00*).
 - **Total:** Final calculated invoice total (e.g., *\$0.00*).

Header & Action Buttons

- **Back Arrow ():** Returns to the main Invoices list view.
- **New Invoice:** Primary blue button to save and generate the invoice record.

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