

# Managing Invoices

## Managing Invoices

The screenshot shows the 'Invoices' page in the Goldilocks Invoice application. The page is titled 'Invoices' and has a subtitle 'Manage your invoices and track payments'. At the top right, there are buttons for '+ New Invoice' and 'Generate Report'. The dashboard features four key metrics cards: 'Total Invoices' (0), 'Paid' (0), 'Pending' (0), and 'Overdue' (0). Below these is an 'Invoice List' section with a search bar and a table. The table has columns for Invoice #, Customer, Date, Due Date, Amount, Balance, and Status. A 'Columns' dropdown menu is open, showing a list of columns to be displayed, including Invoice\_number, Customer, Invoice\_date, Due\_date, Total\_amount, Balance\_remaining, Status, Overdue, Contact\_id, and Actions. The table currently shows 'No results.' and the page is on 'Page 1 of 1'.

The Invoices page is where you track the lifecycle of every bill sent from your workspace. It provides a high-level summary of your revenue and a detailed list for granular management.

## Invoice Overview

At the top of the page, four key metrics provide an instant status update for your current workspace:

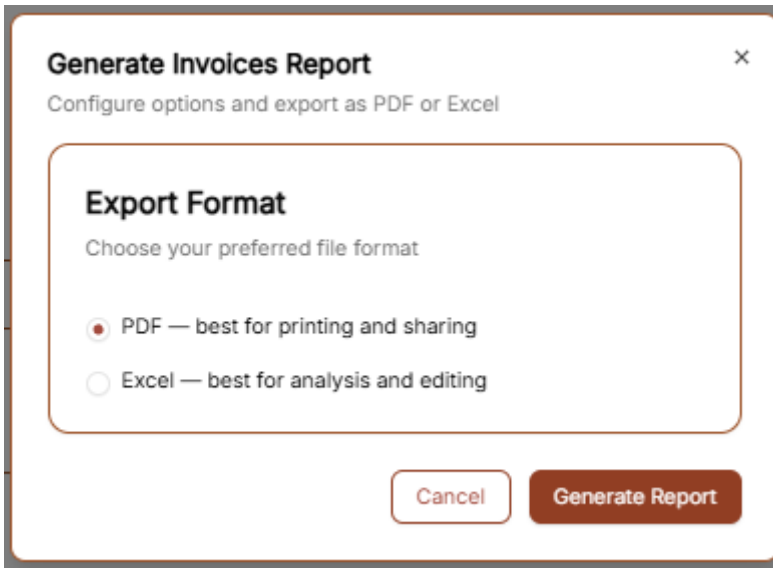
- Total Invoices: The total number of invoices generated.
- Paid: The count of all completed payments.
- Pending: Invoices that have been sent and are awaiting payment.
- Overdue: Any invoices that have passed their assigned due date.

## The Invoice List

The Invoice List table displays all records, allowing you to search and organize your data:

- Search: Use the "Search invoices by number..." bar to find a specific document quickly.
- Customizing Columns: Click the Columns dropdown to choose which details to display, such as Invoice Number, Customer, Date, Due Date, Amount, Balance, and Status.
- New Invoice: Click the + New Invoice button at the top right to start a new billing entry.

## Generating Reports



If you need to export your invoicing data for accounting or review, click the Generate Report button at the top right. This will open a configuration window with the following options:

- PDF: This format is best for printing and direct sharing with stakeholders.
- Excel: This format is best for detailed financial analysis and editing.

Once you have selected your preferred format, click Generate Report to download the file.

## Creating Your First Invoice

Item	Description	Qty	Price	Taxable	Total
Custom	Description	1	0	<input checked="" type="checkbox"/>	\$0
Subtotal:					\$0.00
Tax (0.00%):					\$0.00
Total:					\$0.00

To begin a new bill, click the + New Invoice button from either the Dashboard or the Invoices page. This will open the "Create Invoice" workflow.

## Invoice Details

In this section, you will configure the basic identity and timeline of the invoice:

- **Invoice Number:** This is automatically generated (e.g., INV-10001) but can be modified if you have a specific internal numbering system.
- **Customer:** Select a client from your saved database. If you see the message "No customers found," you must navigate to the Customers tab to add one before you can proceed.
- **Dates:** Use the calendar icons to set both the Invoice Date (when it is issued) and the Due Date (when payment is expected).
- **Terms & Tax:** Use the dropdowns to set Payment Terms (such as "Due On Receipt") and enter the applicable Tax Rate percentage.

## Adding Line Items

Line items represent the specific work or products you are charging for.

- **Adding Items:** Click the + Add Item button to add more rows to your invoice.
- **Item Details:** For each row, you can choose a saved item from your catalog or enter a "Custom" one. Fill in the Description, Quantity (Qty), and Price.
- **Taxable Toggle:** Check the Taxable circle for individual items if tax should be applied specifically to that row.
- **Totals:** The system will automatically calculate your Subtotal, any Tax amounts, and the final Total at the bottom right.

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