

Invoices

The Invoices module manages invoice creation, tracking, and payment monitoring.

Viewing Invoices

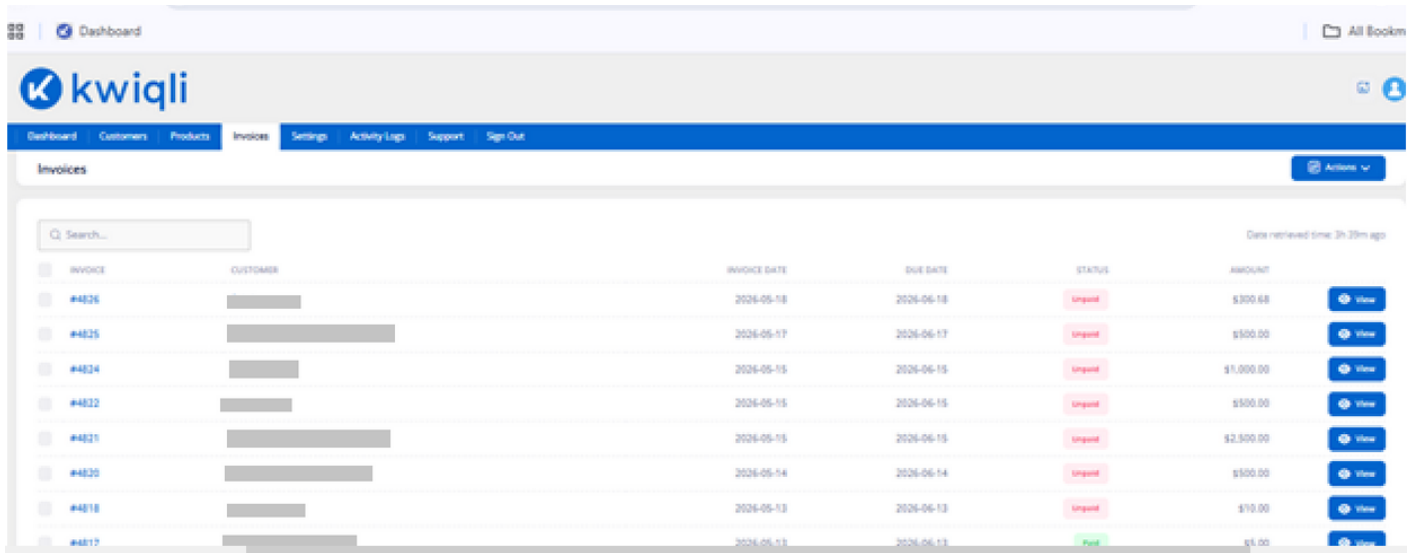
1. Click the Invoices tab.
2. Review invoice records.
3. Use the Search field to locate invoices.

Functions

- Track payment status
 - Review invoice balances
 - Monitor due dates
-

Viewing Invoice Details

1. Locate an invoice.
2. Click View.
3. Review:
 - Line items
 - Customer details
 - Payment status
 - Invoice history



Functions

- Audit billing details
- Verify invoice accuracy
- Review payment activity

Sending an Invoice

You can send an invoice directly to your customer from the Invoice Details page.

1. From the top navigation menu, click **Invoices**.
2. Select the invoice you would like to send.
3. On the Invoice Details page, click the **Actions** button located in the upper-right corner.
4. From the dropdown menu, select **Send Invoice**.
5. The invoice will be emailed to the customer's primary email address on file.

Invoice #4904

[Actions](#)
[Invoice](#) | [Logs](#)
[Send invoice](#)
Created
Sent
Paid

Invoice No: 4904 | Invoice Date: 2026-06-15 | Due Date: 2026-07-15

Invoice From:

[Company Name]

Invoice To:

[Customer Name]

[Email Address]

Item	Qty	Price	Total
Adjustment per Contract Adjustment per Contract - Monthly Minimum Commitment	1	\$1,000.00	\$1,000.00
Grand Total			\$1,000.00
Balance			\$1,000.00

Send Invoice to Email



To:

.....



BCC:

.....



Include attachments

Send →

Send Invoice to Email



To:

.....



BCC:

.....



Include attachments

Send →



Revision #2

Created 16 June 2026 10:46:07 by Jemmabelle Tanjusay

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