

The screenshot shows the 'Invoices' section of the Air4media Pilot v10 dashboard. The top navigation bar includes 'Air4media Pilot v10 BETA', 'Select Company OWNER', and 'All Sites'. The user profile 'Laurent P Groult' is visible in the top right. The sidebar on the left lists various navigation options, with 'Invoices' highlighted. The main content area features a 'voices' header and four summary cards: 'TOTAL REVENUE \$0', 'OUTSTANDING \$0', 'OVERDUE 0', and 'PAID 0'. Below these are search filters for 'h...', '2026', and 'All Statuses', along with a '+ Create Invoice' button. A table header is visible with columns: Invoice #, Title, Account, Issue Date, Due Date, Total, Balance Due, Status, and Actions. The table currently shows 'No records found'.

Invoices

Create, send, and track invoices for your clients — including one-time and recurring billing on autopilot.

Key Features

- **Invoice Builder:** Add custom line items, products from your catalog, or pre-built packages with name, description, quantity, and price
- **Automatic Numbering:** Invoices are numbered sequentially (e.g., INV-2026-0001)
- **Multi-Currency:** Bill in USD, EUR, GBP, CAD, or AUD
- **Discounts & Tax:** Apply fixed or percentage discounts; set a tax rate on taxable items
- **Payment Methods:** Accept Stripe, bank transfer, check, PayPal, cash, or other
- **Public Payment Link:** Share a secure link so clients can view and pay — disable it anytime
- **Payment Recording:** Log partial or full payments with method, reference, and notes
- **Recurring Invoices:** Auto-generate invoices weekly, bi-weekly, monthly, quarterly, semi-annually, or annually
- **Renewal Reminders:** Automatically email clients before a recurring invoice is due
- **Project & Contract Linking:** Attach invoices to a project or contract for better organization
- **Dashboard Stats:** See total revenue, outstanding balance, overdue count, and paid count at

a glance

How to Use

Create an Invoice

1. Click **New Invoice**, select the client account and optional contact
2. Set the title, issue date, and due date
3. Add line items using **Custom Item**, **Product**, or **Package** buttons
4. Apply a discount and/or tax rate if needed
5. Choose which payment methods to accept
6. Optionally link to a project or contract and fill in billing info
7. Add internal notes or client-facing terms, then click **Save Invoice**

Send an Invoice

1. Open the invoice and click **Send** to email it to the client
2. Or click **Mark as Sent** if you sent it another way
3. Share the public link — the invoice moves to **Viewed** once the client opens it

Record a Payment

1. Open the invoice and click **Record Payment**
2. Enter the amount, date, method, and an optional reference or note
3. Save — the status updates automatically (Partially Paid → Paid)

Set Up Recurring Billing

1. Open any invoice and click **Make Recurring**
2. Name the schedule, choose the frequency, and set a start date
3. Enable **Auto-Send** to email invoices to the client automatically
4. Optionally set a renewal reminder (0, 3, 7, 14, or 30 days before each invoice)
5. Save — new invoices generate on schedule without any manual work

Manage Schedules

- Pause, resume, or cancel a recurring schedule at any time
- View all invoices generated from a schedule in one place

Invoice Statuses

Status	Meaning
Draft	Not yet sent — can be edited or deleted
Sent	Delivered to the client
Viewed	Client has opened the public link
Partially Paid	Payment received but balance remains
Paid	Fully paid
Overdue	Past due date with an outstanding balance
Cancelled	Closed without payment — can be deleted

Tips

- Use **Duplicate** to copy an invoice for a similar client
- Use **Revert to Draft** to edit a sent, viewed, or overdue invoice before resending
- Use **Copy Link** from the list to grab the public payment link without opening the invoice
- Filter by **Year** or **Status** to quickly find what you need
- Delete draft and cancelled invoices in bulk using the checkbox selection
- Use **Mark as Sent** in bulk to update multiple invoices at once
- The **Outstanding** stat includes all sent, viewed, and partially paid invoices