



# Invoicing

Create, send, and track professional invoices with online payment collection and full payment history.

## Key Features

- **Invoice Creation:** Build invoices with line items, quantities, rates, and tax rates that calculate totals automatically
- **Online Payments:** Accept credit card payments via Stripe with a secure checkout link sent directly in your invoice email
- **Multiple Payment Methods:** Enable Stripe, ACH, Zelle, check, or wire transfer on any invoice
- **Public Invoice Link:** Every invoice gets a secure shareable link (inv.air4.link) customers can open to view and pay
- **Viewed Tracking:** Know when a client opens their invoice — the status updates to Viewed automatically
- **Payment History:** View all payments per invoice, edit manual entries, and delete records as needed
- **Payment Tracking:** Record manual payments and track partial payments — the balance

updates automatically

- **Refunds:** Issue full or partial Stripe refunds directly from the invoice, with reason tracking
- **Status Management:** Invoices move through Draft → Sent → Viewed → Partially Paid → Paid automatically, or update manually
- **Duplicate Invoices:** Copy any invoice instantly to create a similar one without re-entering details
- **PDF Download:** Download any invoice as a PDF for your records or offline sharing
- **Recurring Invoices:** Set up invoices to repeat on a schedule and manage them from the recurring view
- **Products Library:** Save line items as reusable products to speed up invoice creation
- **Currency Support:** Issue invoices in USD, EUR, GBP, CAD, or AUD
- **Dashboard Stats:** See total revenue, outstanding balance, overdue count, and paid invoice count at a glance

## How to Use

### Create an Invoice

1. Click **Create Invoice** from the Invoicing page
2. Select a client and set the issue and due dates
3. Add line items — enter a description, quantity, and rate; the amount calculates automatically
4. Set a tax rate if applicable; the subtotal, tax, and total update in real time
5. Choose which payment methods to offer (Stripe, ACH, Zelle, check, wire)
6. Click **Save** to save as a draft

### Send an Invoice

1. Open an invoice and click **Send**
2. Search for recipients by name or email — contacts auto-suggest as you type (To, CC, BCC)
3. Choose an email template: Standard Invoice, Payment Reminder, Overdue Notice, or Custom Message
4. Optionally edit the subject and add a personal message
5. Click **Send Invoice** — the customer 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

3. Save — the balance due updates and the status changes to Paid when fully settled

## View Payment History & Refunds

1. Click **View Payments** on any invoice to see all recorded payments
2. Edit manual payment details or delete entries as needed
3. For Stripe payments, click **Refund** to issue a full or partial refund and select a reason

## Copy the Public Link

1. Click **Copy Link** on any invoice
2. Share the link with your client — they can view the invoice and pay online without logging in

## Tips

- Set invoices to **Draft** while building them; clients cannot see them until sent
- Use **Duplicate** from the row menu to clone an existing invoice and save re-entry time
- The **Overdue** stat card highlights when invoices have passed their due date unpaid
- Select multiple invoices to batch delete or mark as sent at once
- Use **Mark as Sent** or **Mark as Draft** from the row actions to manually adjust status
- Filter by status or year to quickly find what you need in large lists
- Partial payments are supported — record multiple payments and the balance tracks automatically
- Only draft or cancelled invoices can be permanently deleted