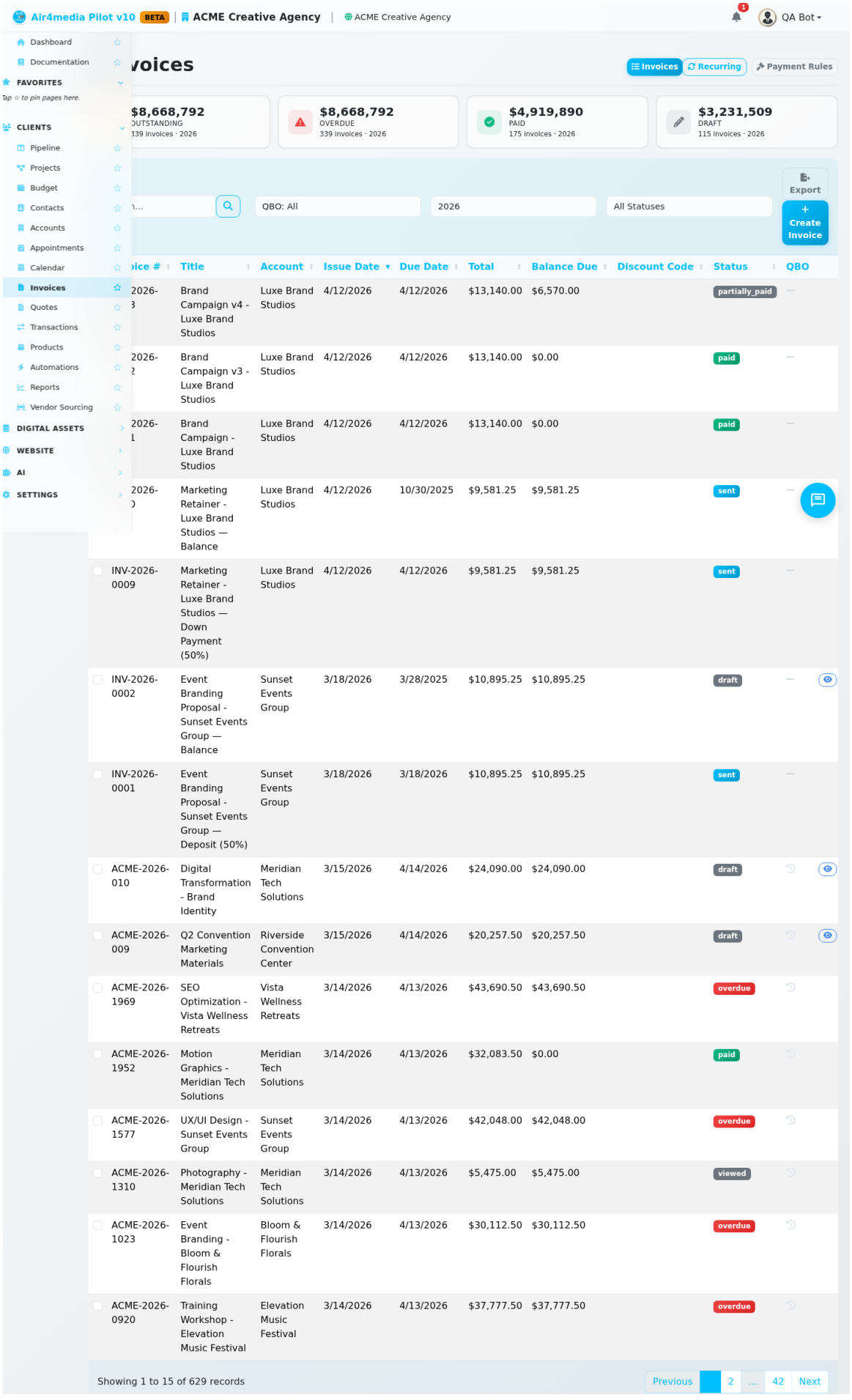
Air4media Pilot v10 BETA
ACME Creative Agency
ACME Creative Agency
QA Bot
Dashboard
Documentation
FAVORITES
CLIENTS
Pipeline
Projects
Budget
Contacts
Accounts
Appointments
Calendar
Invoices
Quotes
Transactions
Products
Automations
Reports
Vendor Sourcing
DIGITAL ASSETS
WEBSITE
AI
SETTINGS
voices
Invoices
Recurring
Payment Rules
$8,668,792
OUTSTANDING
339 invoices · 2026
$8,668,792
OVERDUE
339 invoices · 2026
$4,919,890
PAID
175 invoices · 2026
$3,231,509
DRAFT
115 invoices · 2026
Export
QBO: All
2026
All Statuses
+ Create Invoice
Title
Account
Issue Date
Due Date
Total
Balance Due
Discount Code
Status
QBO
Brand Campaign v4 - Luxe Brand Studios
Luxe Brand Studios
4/12/2026
4/12/2026
$13,140.00
$6,570.00
partially_paid
Brand Campaign v3 - Luxe Brand Studios
Luxe Brand Studios
4/12/2026
4/12/2026
$13,140.00
$0.00
paid
Brand Campaign - Luxe Brand Studios
Luxe Brand Studios
4/12/2026
4/12/2026
$13,140.00
$0.00
paid
Marketing Retainer - Luxe Brand Studios — Balance
Luxe Brand Studios
4/12/2026
10/30/2025
$9,581.25
$9,581.25
sent
INV-2026-0009
Marketing Retainer - Luxe Brand Studios — Down Payment (50%)
Luxe Brand Studios
4/12/2026
4/12/2026
$9,581.25
$9,581.25
sent
INV-2026-0002
Event Branding Proposal - Sunset Events Group — Balance
Sunset Events Group
3/18/2026
3/28/2025
$10,895.25
$10,895.25
draft
INV-2026-0001
Event Branding Proposal - Sunset Events Group — Deposit (50%)
Sunset Events Group
3/18/2026
3/18/2026
$10,895.25
$10,895.25
sent
ACME-2026-010
Digital Transformation - Brand Identity
Meridian Tech Solutions
3/15/2026
4/14/2026
$24,090.00
$24,090.00
draft
ACME-2026-009
Q2 Convention Marketing Materials
Riverside Convention Center
3/15/2026
4/14/2026
$20,257.50
$20,257.50
draft
ACME-2026-1969
SEO Optimization - Vista Wellness Retreats
Vista Wellness Retreats
3/14/2026
4/13/2026
$43,690.50
$43,690.50
overdue
ACME-2026-1952
Motion Graphics - Meridian Tech Solutions
Meridian Tech Solutions
3/14/2026
4/13/2026
$32,083.50
$0.00
paid
ACME-2026-1577
UX/UI Design - Sunset Events Group
Sunset Events Group
3/14/2026
4/13/2026
$42,048.00
$42,048.00
overdue
ACME-2026-1310
Photography - Meridian Tech Solutions
Meridian Tech Solutions
3/14/2026
4/13/2026
$5,475.00
$5,475.00
viewed
ACME-2026-1023
Event Branding - Bloom & Flourish Florals
Bloom & Flourish Florals
3/14/2026
4/13/2026
$30,112.50
$30,112.50
overdue
ACME-2026-0920
Training Workshop - Elevation Music Festival
Elevation Music Festival
3/14/2026
4/13/2026
$37,777.50
$37,777.50
overdue
Showing 1 to 15 of 629 records
Previous
1
2
...
42
Next

Invoices

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

Key Features

- **Invoice Builder**: Add line items using custom entries, products from your catalog, or pre-built packages — each with name, description, quantity, unit, 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 per line item
- **Payment Methods**: Accept Stripe, bank transfer, check, PayPal, Zelle, 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
- **Payment Reminders**: Send a quick payment request email from any unpaid invoice without re-sending the full invoice
- **Recurring Invoices**: Auto-generate invoices weekly, bi-weekly, monthly, quarterly, semi-annually, or annually — with optional auto-send directly to your client
- **Renewal Reminders**: Automatically email clients 3, 7, 14, or 30 days before a recurring invoice is due
- **Payment Rules**: Define reusable payment terms to apply consistently across invoices
- **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 — for example, one of ACME Creative Agency's active clients — and an optional contact
2. Set the title, issue date, and due date
3. Add line items using the **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 each generated invoice to the client automatically
4. Optionally set a renewal reminder (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 from the row menu
- Click **View Schedule** on any recurring invoice to see its frequency, next date, auto-send status, and how many invoices have been generated

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

Status	Meaning
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 or project
- Use **Revert to Draft** to edit a sent, viewed, or overdue invoice before resending
- Use **Request Payment** to nudge a client with a reminder email — no need to resend the full invoice
- Use **Copy Link** from the list to grab the public payment link without opening the invoice
- Use **Send Selected** to email multiple invoices to clients in one action
- 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
- Click **Payment Rules** in the page header to manage reusable billing terms
- The **Outstanding** stat includes all sent, viewed, and partially paid invoices