

CITTK

How to create invoices



How to create invoices

Invoicing is a very important part of any business. It helps you keep track of your expenses, and it also allows you to get paid for the work that you do. You can easily create invoices from within the system.

In this article we will cover how to create, edit, discount, add taxes and send your invoice(s)

Covered in this Article:

Overview

You can now send invoices to your customers/clients using the products that you have created in your sub-account.

Please Note:

If you are using invoicing without Stripe Connect please see this guide - [Using invoices for recording manual payments without Stripe Connect](#)
Limitation to using invoicing without Stripe Connect is that the user will need to manually record t

How to create a new invoice.

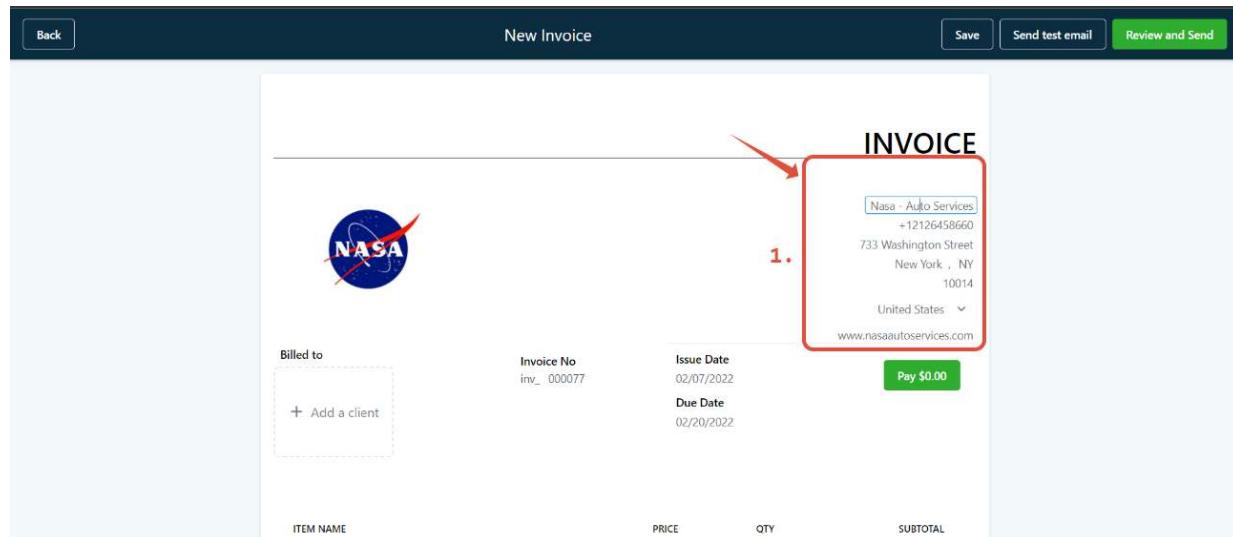
Go to the Payments tab and click on the invoice tab

1. Click on the button "New" and start creating a new invoice.

Note:

Add Global terms of services/ notes by clicking on the gear wheel icon (orange arrow) next to the "+ New" button

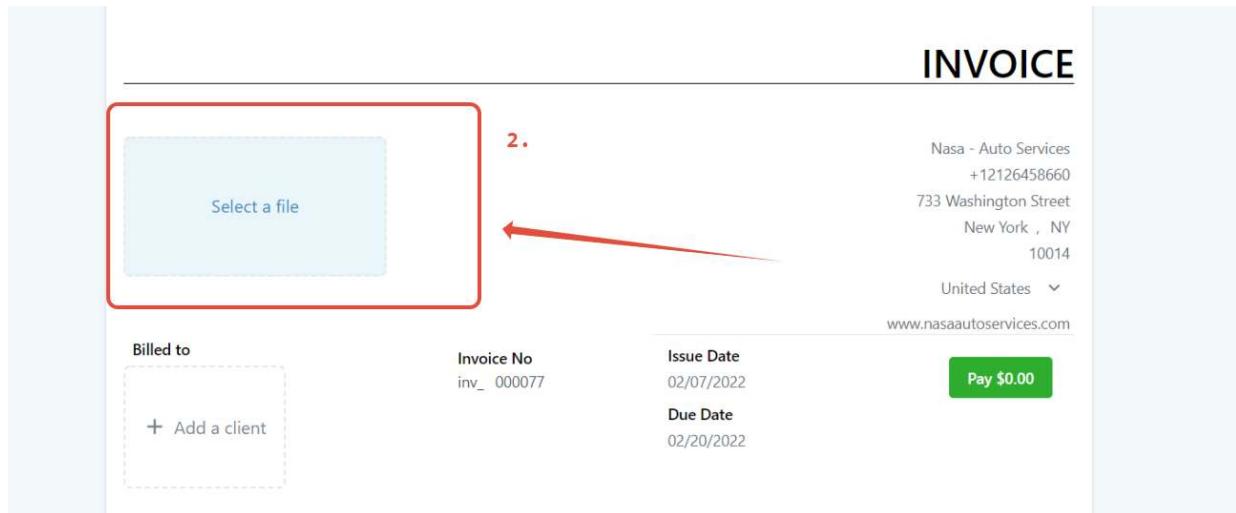
How to edit your invoice info



Step 1: Edit the “from info” by just clicking on the text and it will allow you to edit that information.

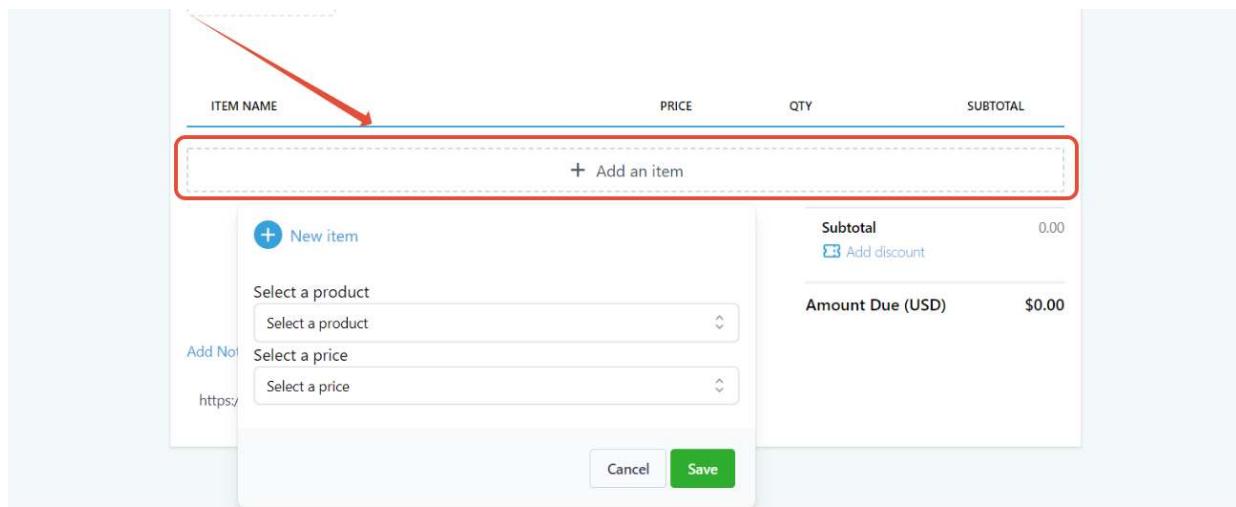
Step 2: You can change the image by clicking on it, this will open up the media library where you may choose or upload a new image from there.

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Step 3: Then you can add the client and edit the Invoice number, Issue, and Due dates.

Step 4: Click add an item to add the products that you have created on your products tab



Step 5:

Once you will add the product it will allow you to edit the price edit quantity as well

How to create invoices



ITEM NAME

PRICE

QTY

SUBTOTAL

prod nam

Item description

\$ 12

Add Tax

1

\$12.00 X

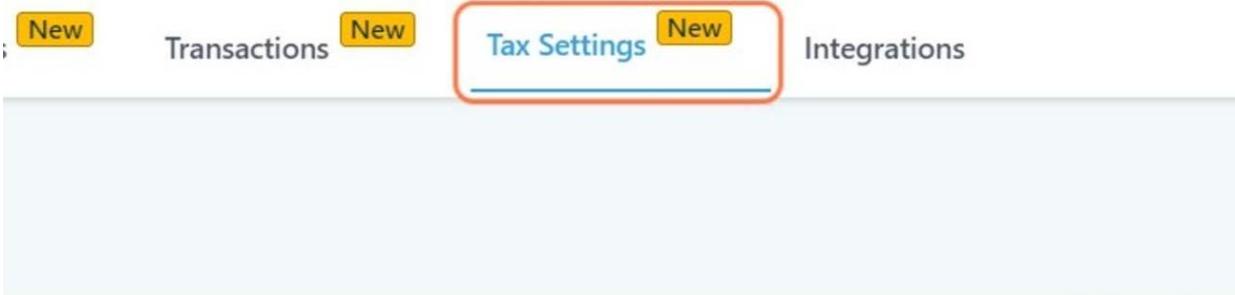
Click Here to edit

Subtotal

12.00

Add discount

How to add taxes to your invoice



New

Transactions

New

Tax Settings

New

Integrations

RATE	DESCRIPTION	TAX ID NUMBER
12.50%	Tax Rate 1	XXXXXXXXXX

Step1: Click on Tax Settings...



Integrations

Call icon

More icon

Add Tax

TAX ID NUMBER	CREATED AT
	02/10/2022 7:24

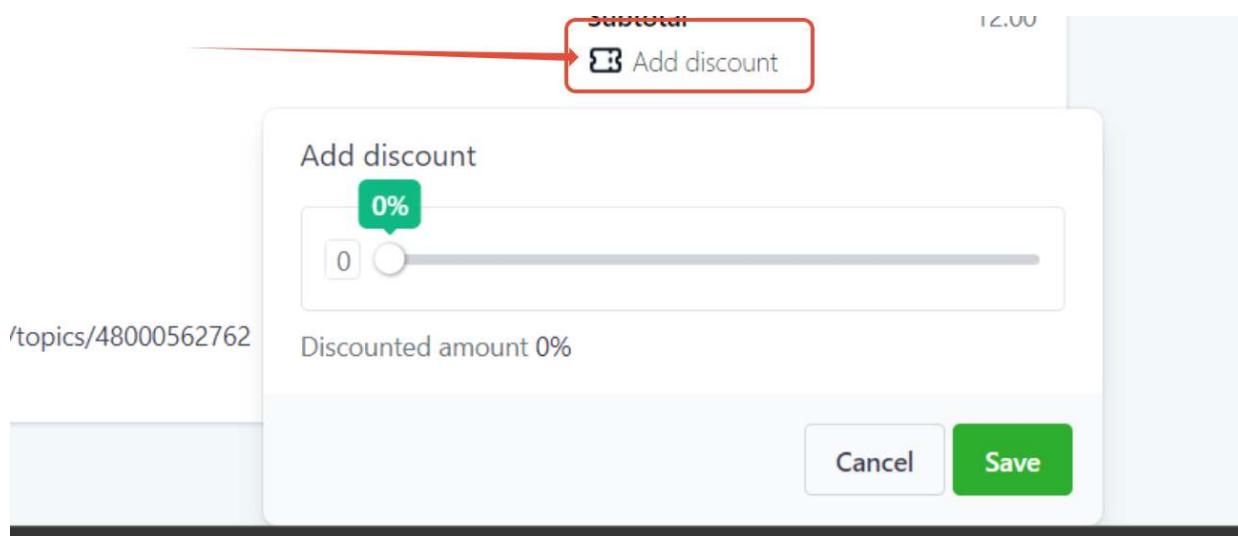
Step 2: Click on Add Tax

Step 3: Click on Add Tax

Add the name of the TaxAdd rate in %Add a description or Tax id number

How to add a discount to your invoice

You can add a discount to this invoice by clicking on the "add discount" icon



How to send an invoice

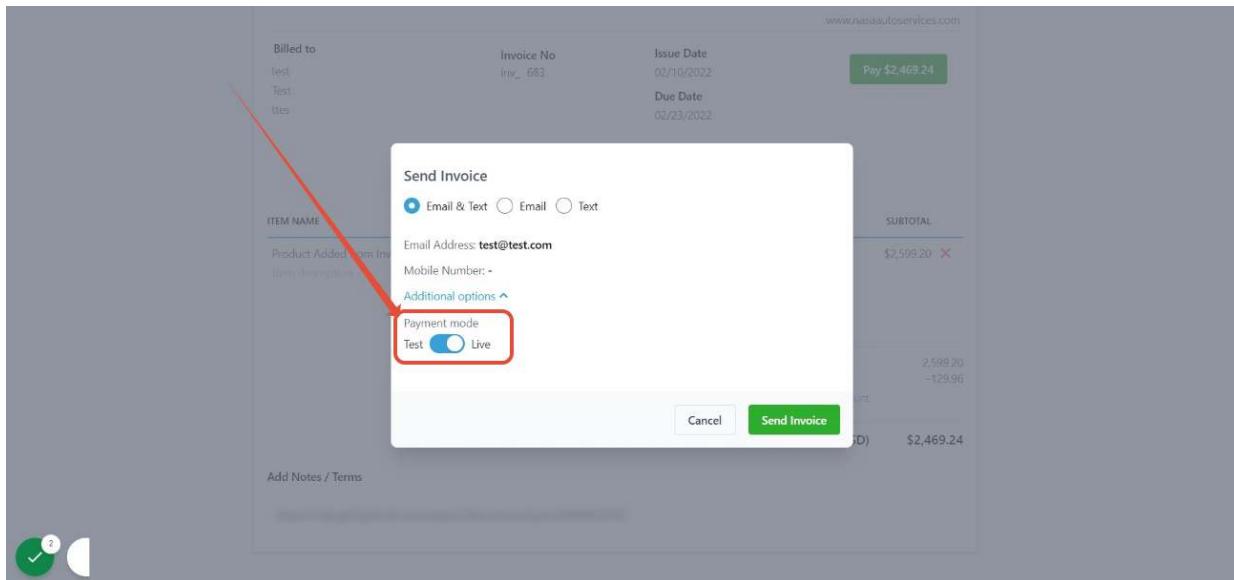
Step 1: Once you create the invoice now you can send that to your client using the green button on top right corner.

Step 2:

You can send the invoice through email and text as you want and also you can send that on test mode as well.

Click on the advanced option to switch to the live and test mode.

How to create invoices



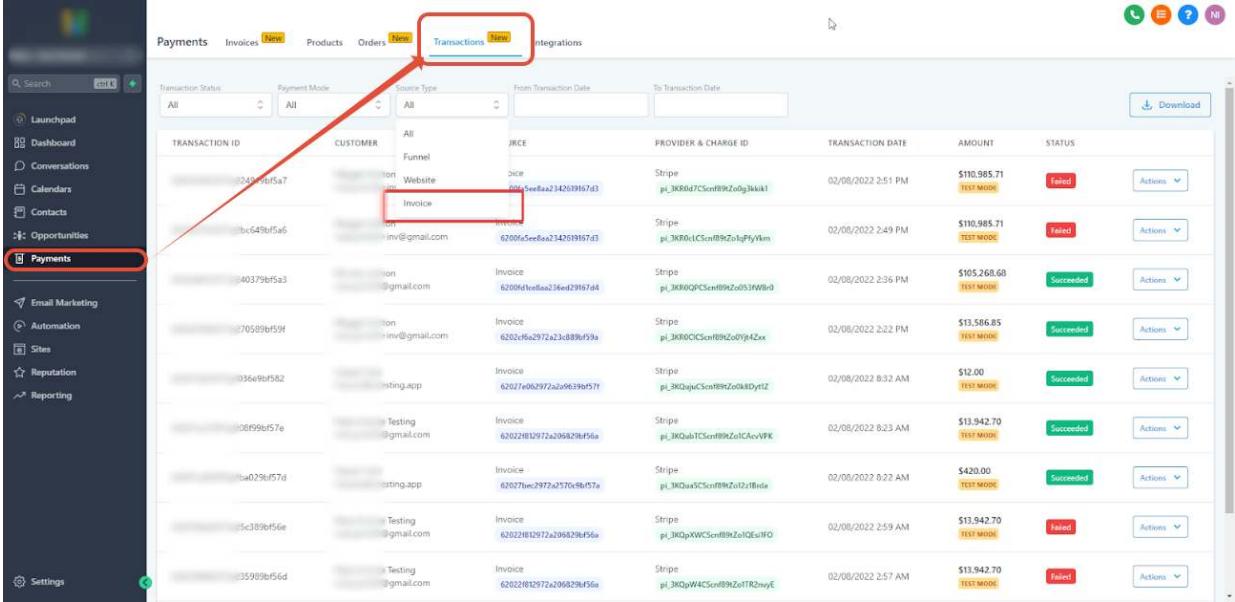
How to check the status of your invoices

Step 1: Go to the Invoices tab where you will see the list of invoices and their statuses. Step 2: You can filter the invoices by status and date range as well

Invoices can also be found in the Transaction tab.

You can also look for successful, or failed transactions related to invoices. You can directly open the invoices as well. **Payments > Transactions**

How to create invoices



The screenshot shows the Invoicely software interface. On the left, a sidebar menu is visible with options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments (which is selected and highlighted with a red box), Email Marketing, Automation, Sites, Reputation, and Reporting. On the right, the main content area has a top navigation bar with tabs: Payments, Invoices (New), Products, Orders (New), Transactions (New), and Integrations. The 'Transactions' tab is highlighted with a red box. Below the navigation is a search bar and filter options for Transaction Status (All), Payment Mode (All), Source Type (All), and Date range (From Transaction Date, To Transaction Date). The main table lists transactions with columns: TRANSACTION ID, CUSTOMER, PRICE, PROVIDER & CHARGE ID, TRANSACTION DATE, AMOUNT, and STATUS. One transaction in the list is highlighted with a red box and labeled 'Invoice'.

TRANSACTION ID	CUSTOMER	PRICE	PROVIDER & CHARGE ID	TRANSACTION DATE	AMOUNT	STATUS
248fb1f5a7	jon@gmail.com	Invoice	Stripe pi_3K8b0d7C5enf8tZo3g34kk1	02/08/2022 2:51 PM	\$110.985.71 TEST MODE	Failed
1bc649fb1f5a6	jon@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34kykm	02/08/2022 2:49 PM	\$110.985.71 TEST MODE	Failed
40379fb1f5a3	jon@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34Wb0	02/08/2022 2:36 PM	\$105.268.68 TEST MODE	Succeeded
70589fb1f59f	jon@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g342xx	02/08/2022 2:22 PM	\$13.586.85 TEST MODE	Succeeded
036e9fb1f582	Testing.app	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34DytZ	02/08/2022 8:32 AM	\$12.00 TEST MODE	Succeeded
108fb9fb1f57e	Testing@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34vWk	02/08/2022 8:23 AM	\$13.942.70 TEST MODE	Succeeded
0ad29fb1f57d	Testing.app	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g342r1Bde	02/08/2022 8:22 AM	\$420.00 TEST MODE	Succeeded
5c389fb1f56e	Testing@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34Qes1fQ	02/08/2022 2:59 AM	\$13.942.70 TEST MODE	Failed
359fb9fb1f56d	Testing@gmail.com	Invoice	Stripe pi_3K8b0d1C5enf8tZo3g34Tf2wyE	02/08/2022 2:57 AM	\$13.942.70 TEST MODE	Failed

Notes:

The transaction tab is only available in the [new UI](#)