

# CITK

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)

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## Covered in this Article:

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## 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

The screenshot shows the 'New Invoice' form. At the top, there are buttons for 'Back', 'Save', 'Send test email', and 'Review and Send'. The main content area is divided into sections. On the left, there is a 'Billed to' section with a placeholder for a client. In the center, there is an 'Invoice No' field with the value 'inv\_000077'. To the right, there is an 'Issue Date' field with the value '02/07/2022' and a 'Due Date' field with the value '02/20/2022'. On the far right, there is a green 'Pay \$0.00' button. The 'INVOICE' section is highlighted with a red box and a red arrow pointing to it, with a red '1.' next to the arrow. The 'INVOICE' section contains the following information: 'Nasa - Auto Services', '+12126458660', '733 Washington Street', 'New York, NY 10014', 'United States', and 'www.nasaautoservices.com'. Below the 'INVOICE' section, there is a table with columns for 'ITEM NAME', 'PRICE', 'QTY', and 'SUBTOTAL'.

**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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**INVOICE**

Nasa - Auto Services  
+12126458660  
733 Washington Street  
New York , NY  
10014  
United States  
www.nasaautoservices.com

**2.**

Select a file

Billed to  
+ Add a client

Invoice No  
inv\_000077

Issue Date  
02/07/2022

Due Date  
02/20/2022

Pay \$0.00

**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

ITEM NAME	PRICE	QTY	SUBTOTAL
+ Add an item			

+ New item

Select a product  
Select a product

Select a price  
Select a price

Cancel Save

Subtotal 0.00

Add discount

Amount Due (USD) \$0.00

**Step 5:**

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



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ITEM NAME	PRICE	QTY	SUBTOTAL
prod nam Item description	\$ 12 Add tax	1	\$12.00 ✕
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		

**Step1:** Click on Tax Settings...

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

**Step 2:** Click on Add Tax

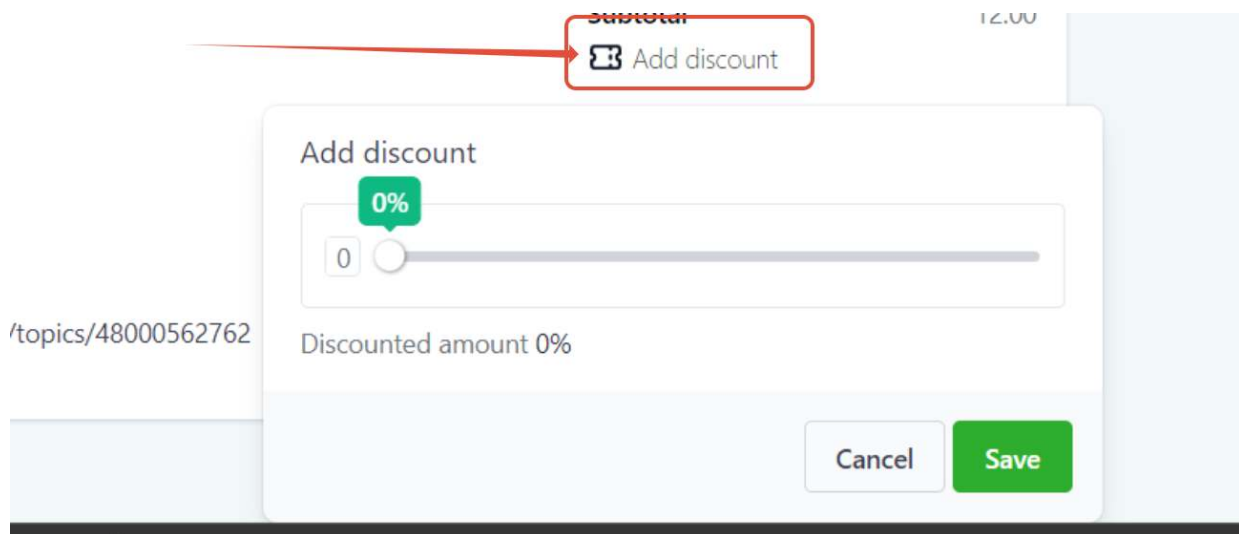
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### Step 3: Click on Add Tax

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

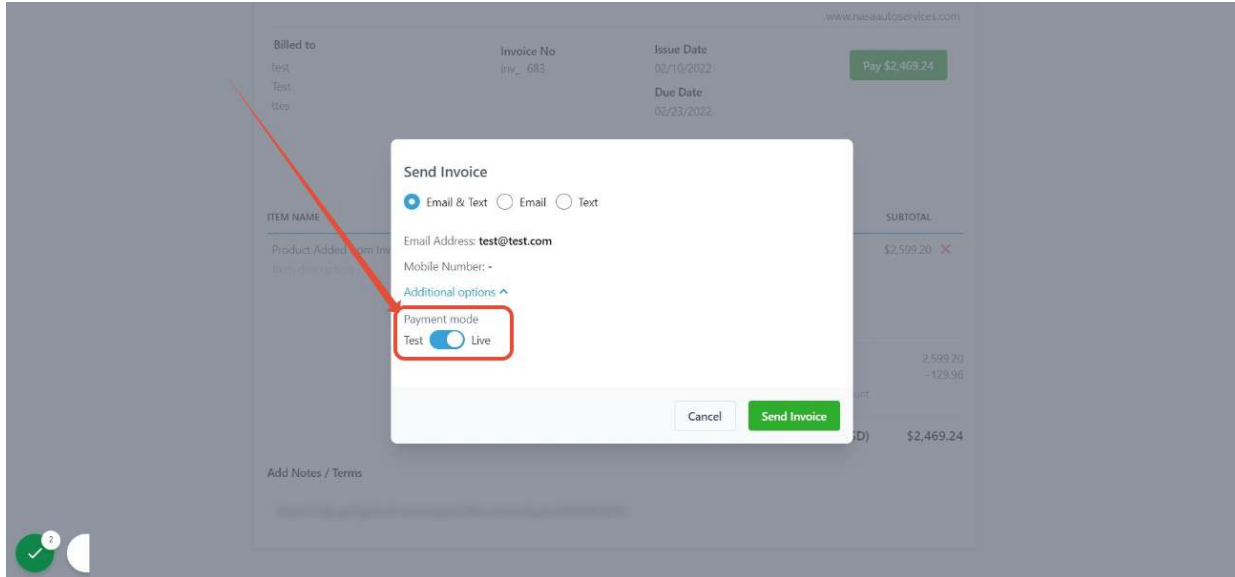
**Step 1:** Once you create the invoice now you can send that to your client using the green button on top right corner.

### 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.

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## 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**

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The screenshot shows the Payments dashboard with the Transactions tab selected. The left sidebar has the Payments tab highlighted. The top navigation bar has the Transactions tab highlighted. The Source Type dropdown menu is open, showing the Invoice option highlighted. A red arrow points from the Payments tab in the left sidebar to the Transactions tab in the top navigation bar.

TRANSACTION ID	CUSTOMER	Source Type	PRICE	PROVIDER & CHARGE ID	TRANSACTION DATE	AMOUNT	STATUS	Actions
6240c45b5a7	ion	Funnel	Site	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:51 PM	\$110,985.71 TEST MODE	Failed	Actions
62bc649bf5a6	ion inv@gmail.com	Website	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:49 PM	\$110,985.71 TEST MODE	Failed	Actions
6240379bf5a3	ion @gmail.com	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:36 PM	\$105,268.68 TEST MODE	Succeeded	Actions
6270589bf59f	ion inv@gmail.com	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:22 PM	\$13,586.85 TEST MODE	Succeeded	Actions
6236e9bf5a2	Testing.app	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 8:32 AM	\$12.00 TEST MODE	Succeeded	Actions
6208f9bf57e	Testing @gmail.com	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 8:23 AM	\$13,942.70 TEST MODE	Succeeded	Actions
62a029bf578	Testing.app	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 8:22 AM	\$420.00 TEST MODE	Succeeded	Actions
625c38bf56e	Testing @gmail.com	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:59 AM	\$13,942.70 TEST MODE	Failed	Actions
623508bf56d	Testing @gmail.com	Invoice	Invoice	Stripe pi_3K86d7CScn89Zu0y3k4k1	02/08/2022 2:57 AM	\$13,942.70 TEST MODE	Failed	Actions

## Notes:

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