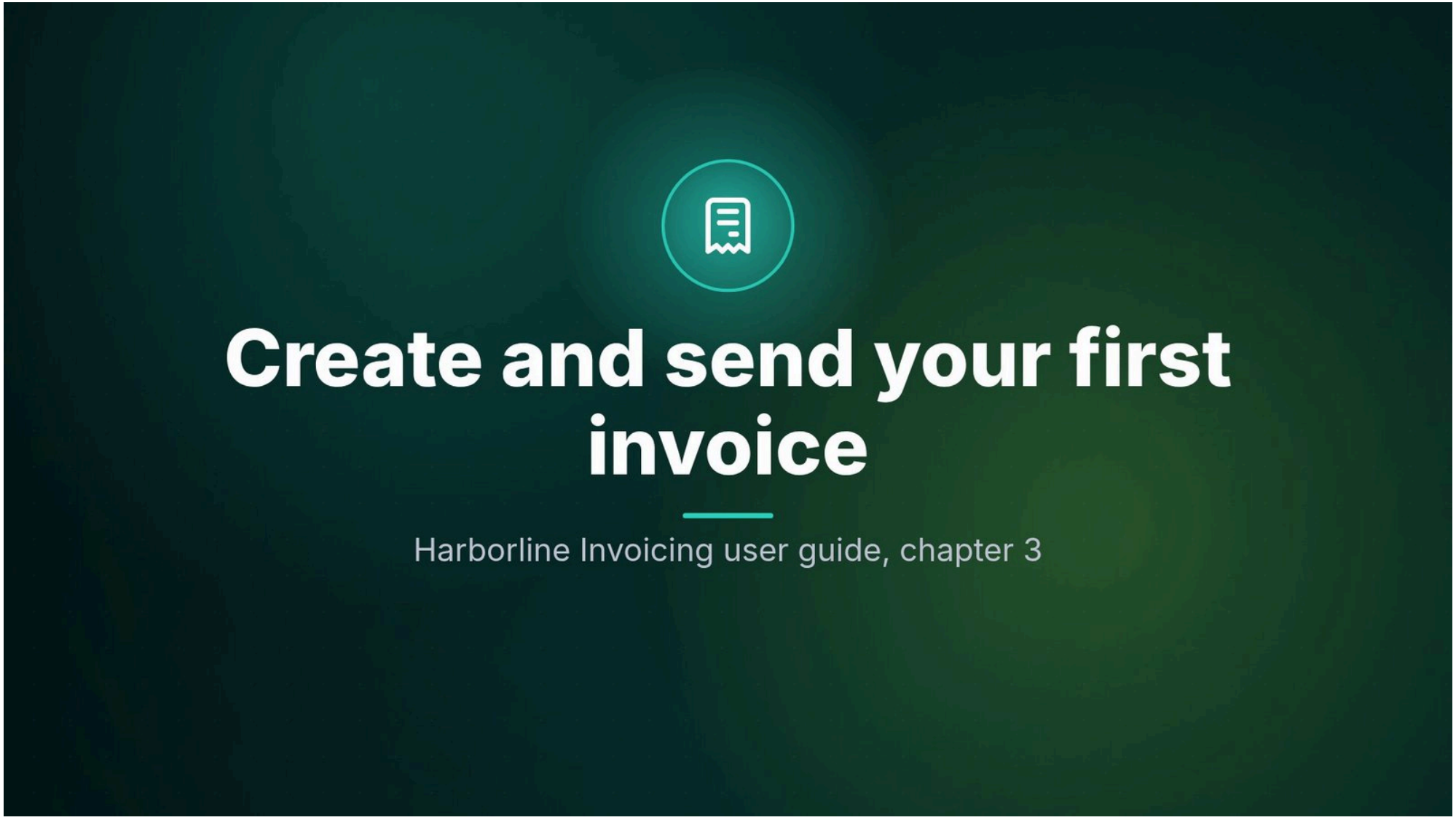
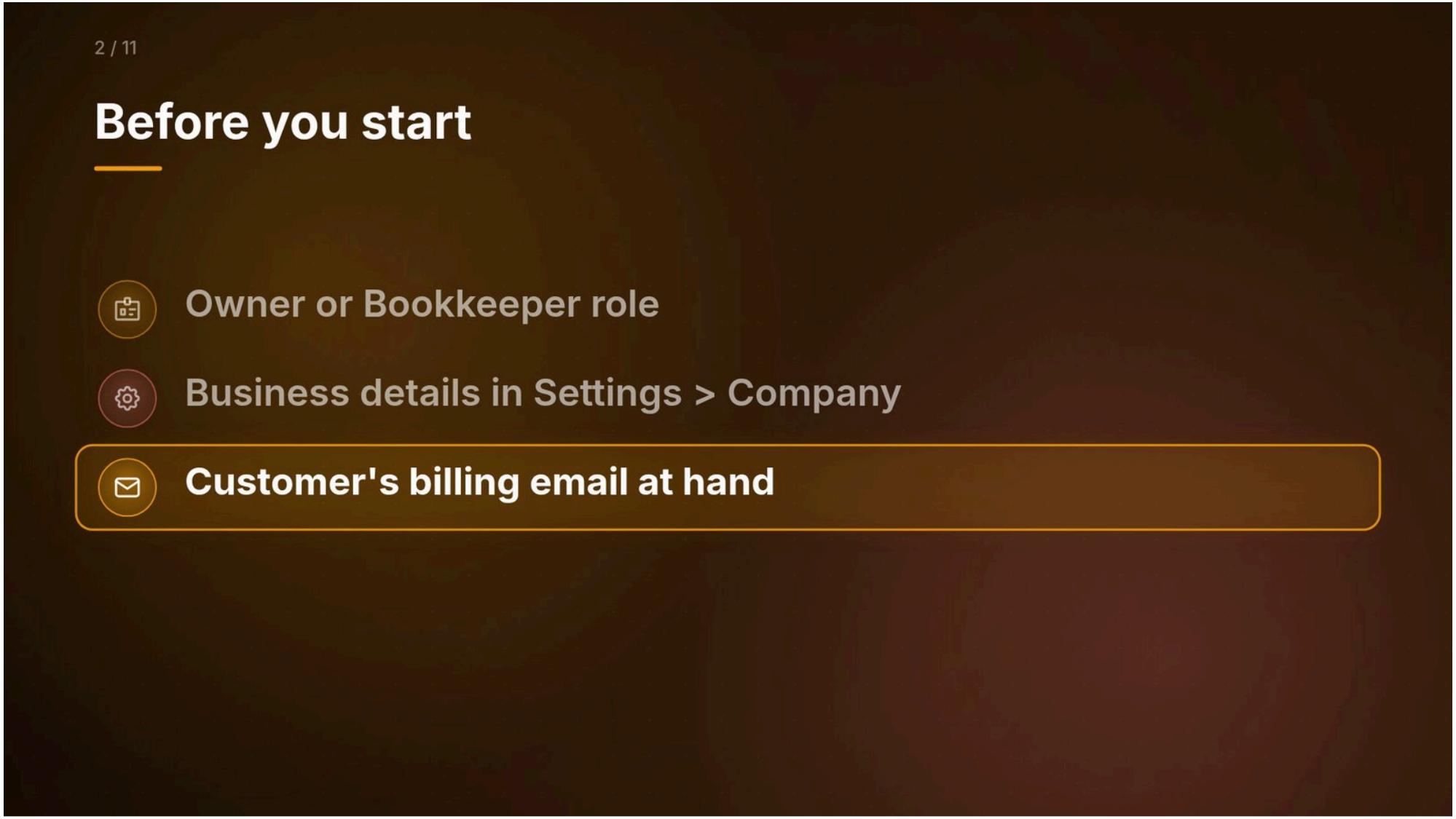


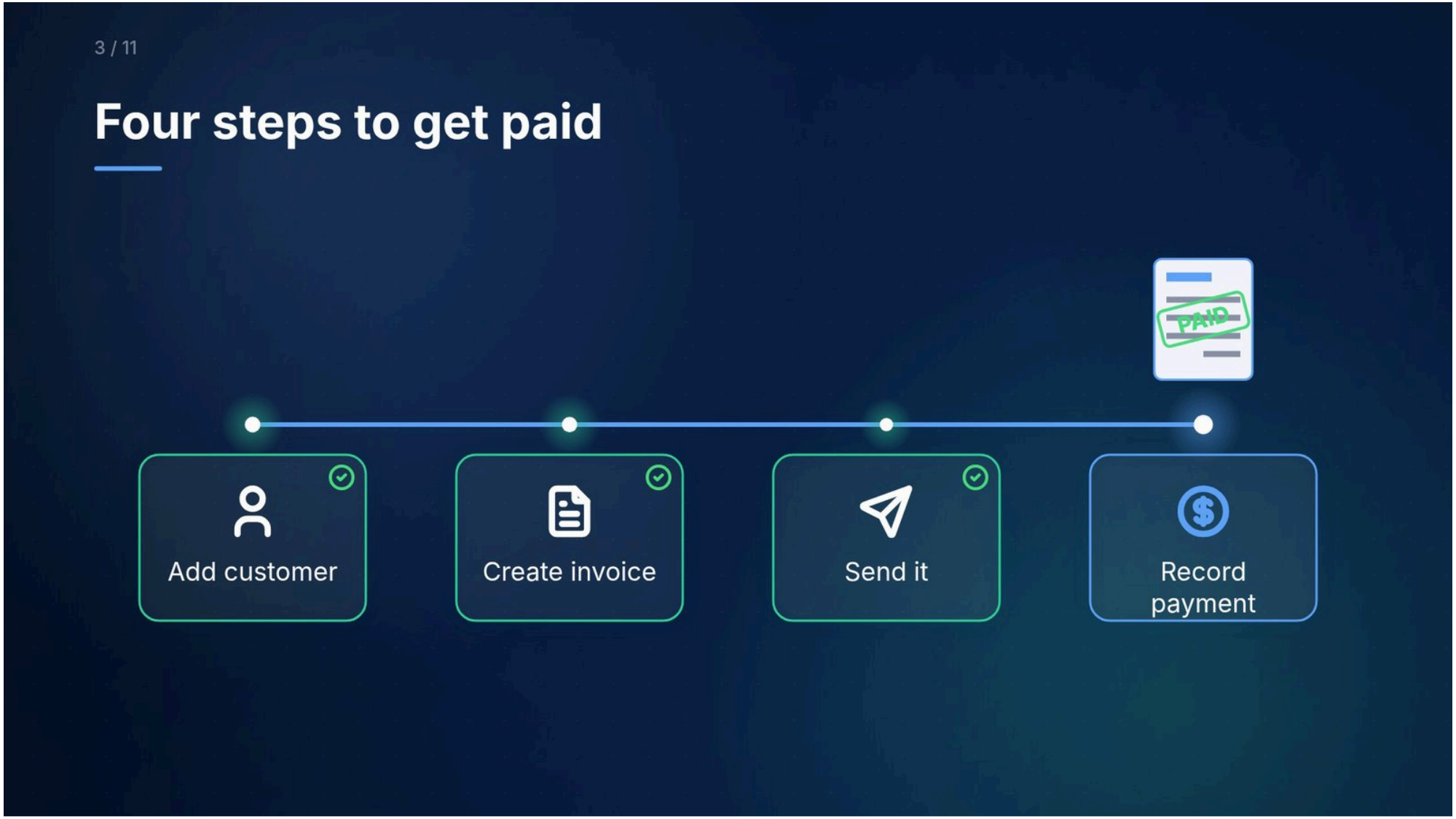
1 / 11 · Your first invoice

In this video, you'll learn how to bill a customer for the first time in Harborline Invoicing. We'll add the customer, build the invoice, send it by email and record the payment. The whole job takes about five minutes.



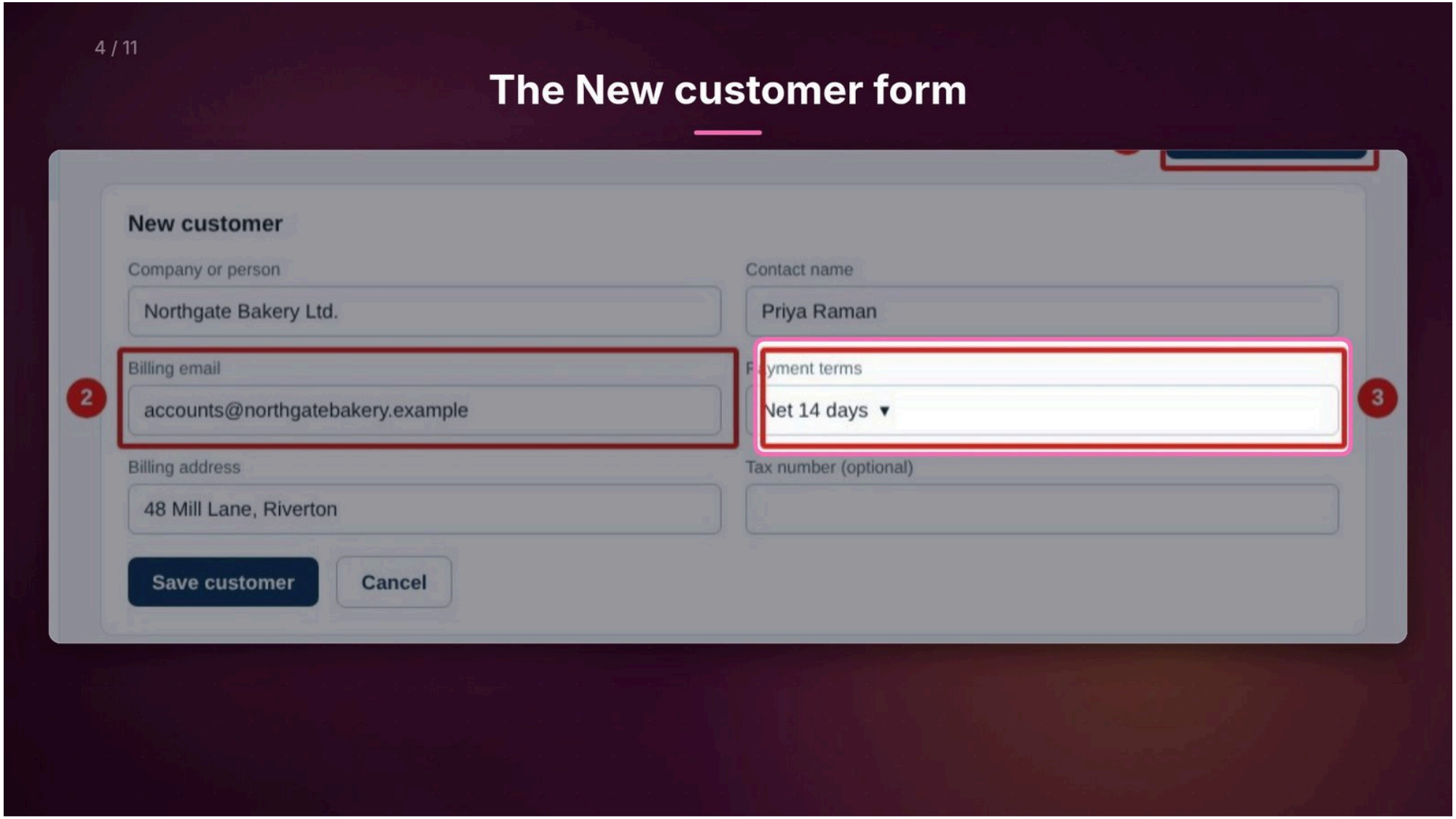
2 / 11 · Before you start

First, a quick check. You need the Owner or Bookkeeper role, because Viewers can open invoices but can't create or send them. Confirm your business details under Settings, Company, since they print on every invoice. And have the customer's billing email ready.



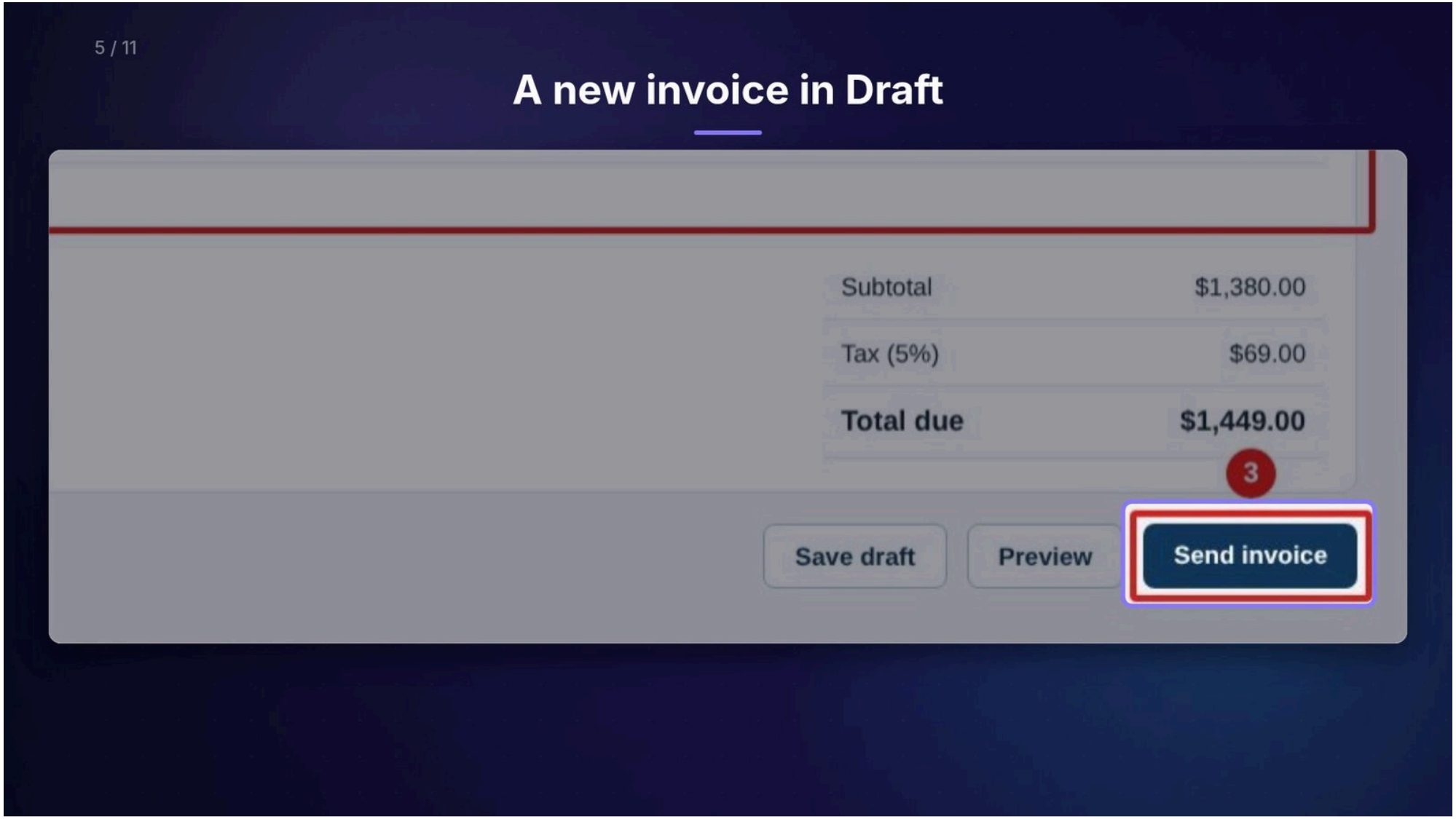
3 / 11 · The four steps

The process has four steps. Add the customer, which you only do once per customer. Create the invoice by choosing the customer and adding what you're charging for. Send it, so the customer gets an email with a link to view and pay. Finally, record the payment when the money arrives.



4 / 11 · Step 1: Add the customer

Step one happens on the Customers page. Select New customer to open the form. Enter the billing email carefully, because invoices and reminders are sent there. Then choose the payment terms: Net 14 days means the invoice is due 14 days after you send it, and each new invoice takes its due date from this. Select Save customer when you're done.



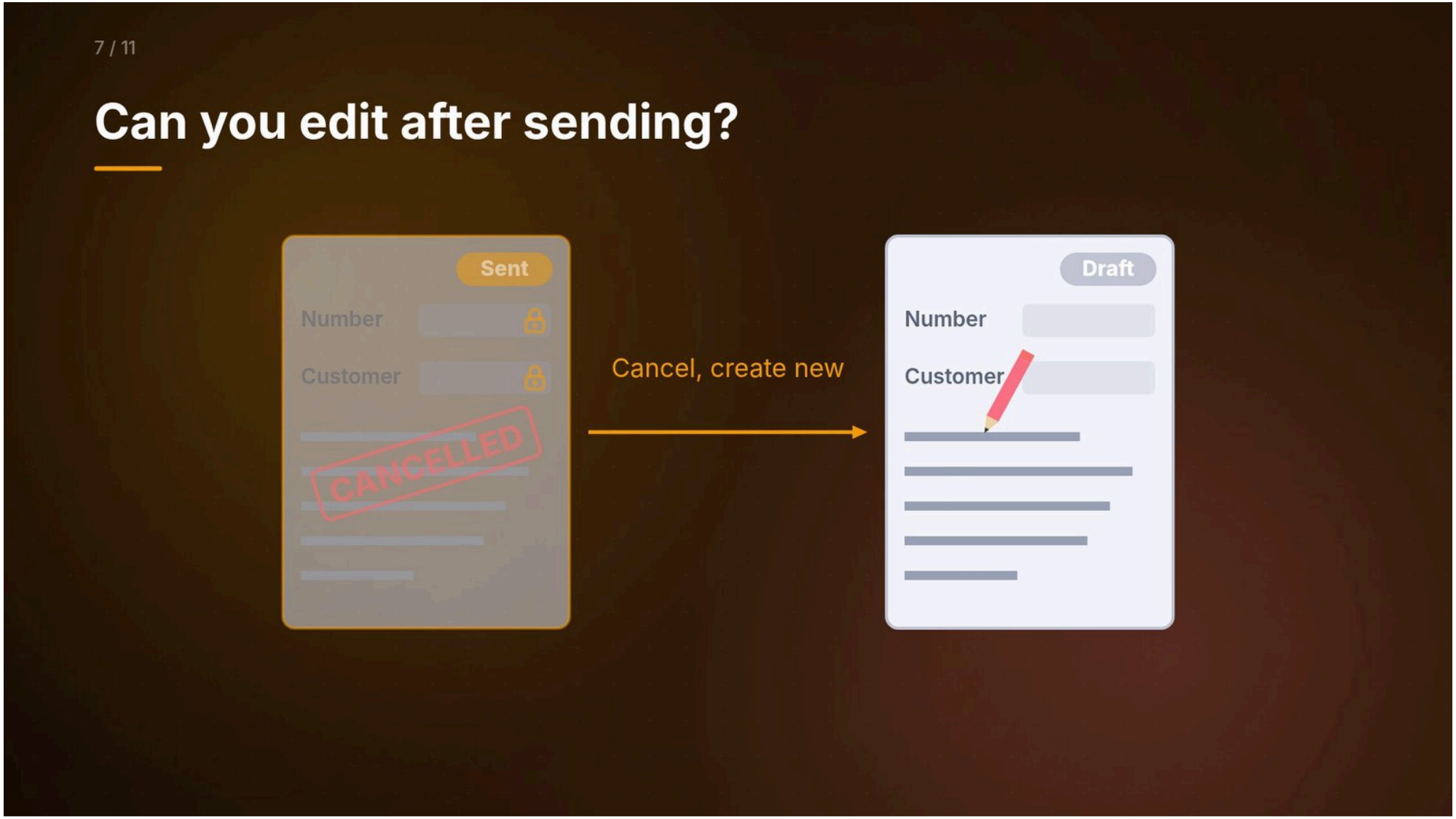
5 / 11 · Step 2: Create the invoice

Next, open Invoices and select New invoice. Choose the customer, and the invoice number and due date fill in for you. Add a line for each thing you're charging for, with a description, quantity and unit price; the amount, tax and total are calculated automatically. Select Preview to check it, then Send invoice.



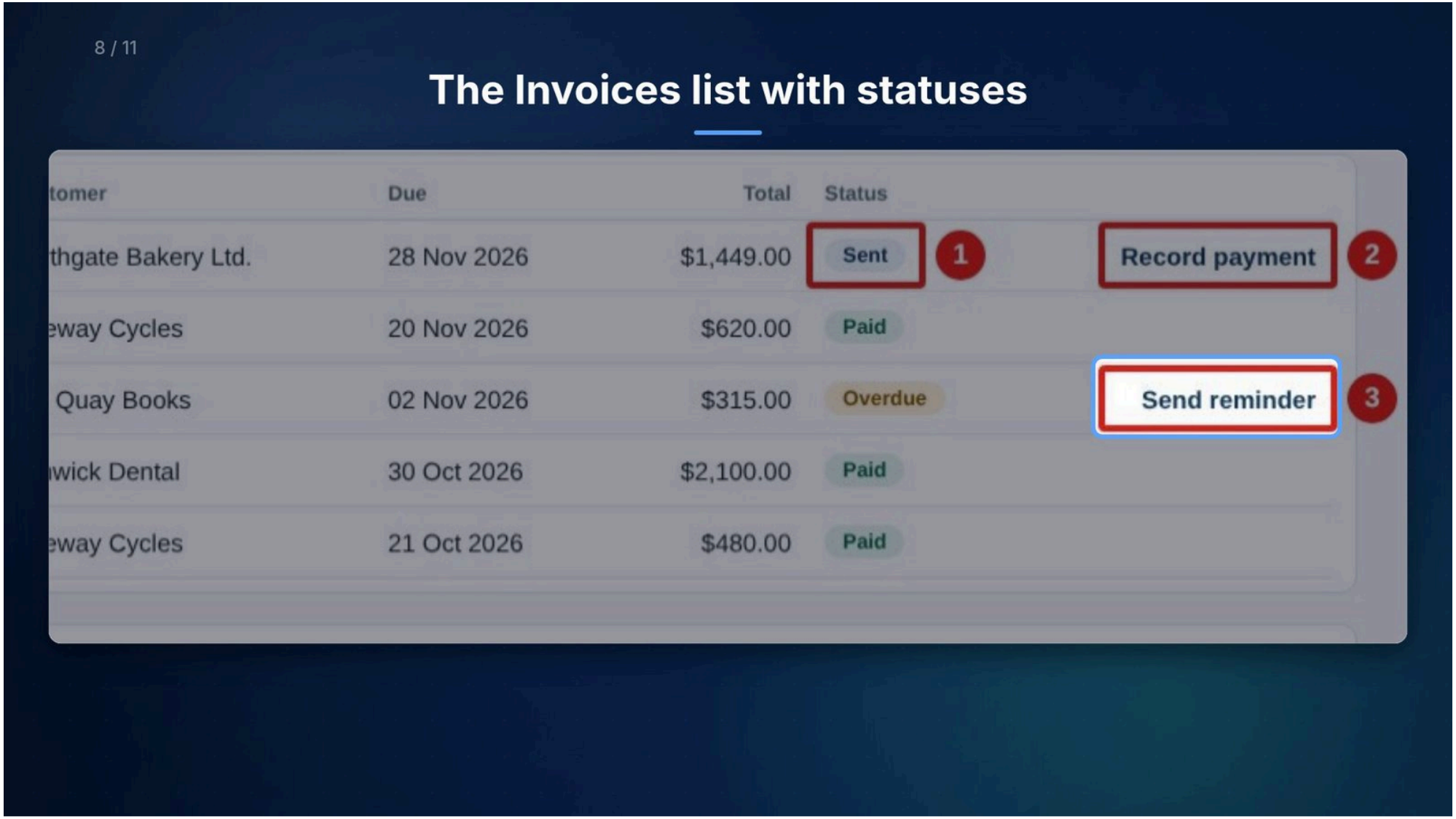
6 / 11 · Step 3: Send or save

When the preview looks right, you have two choices. Send invoice emails the customer a link to view and pay, sends you a copy, and changes the status from Draft to Sent. Not ready yet? Save draft keeps it without emailing anyone, and drafts don't count in your reports.



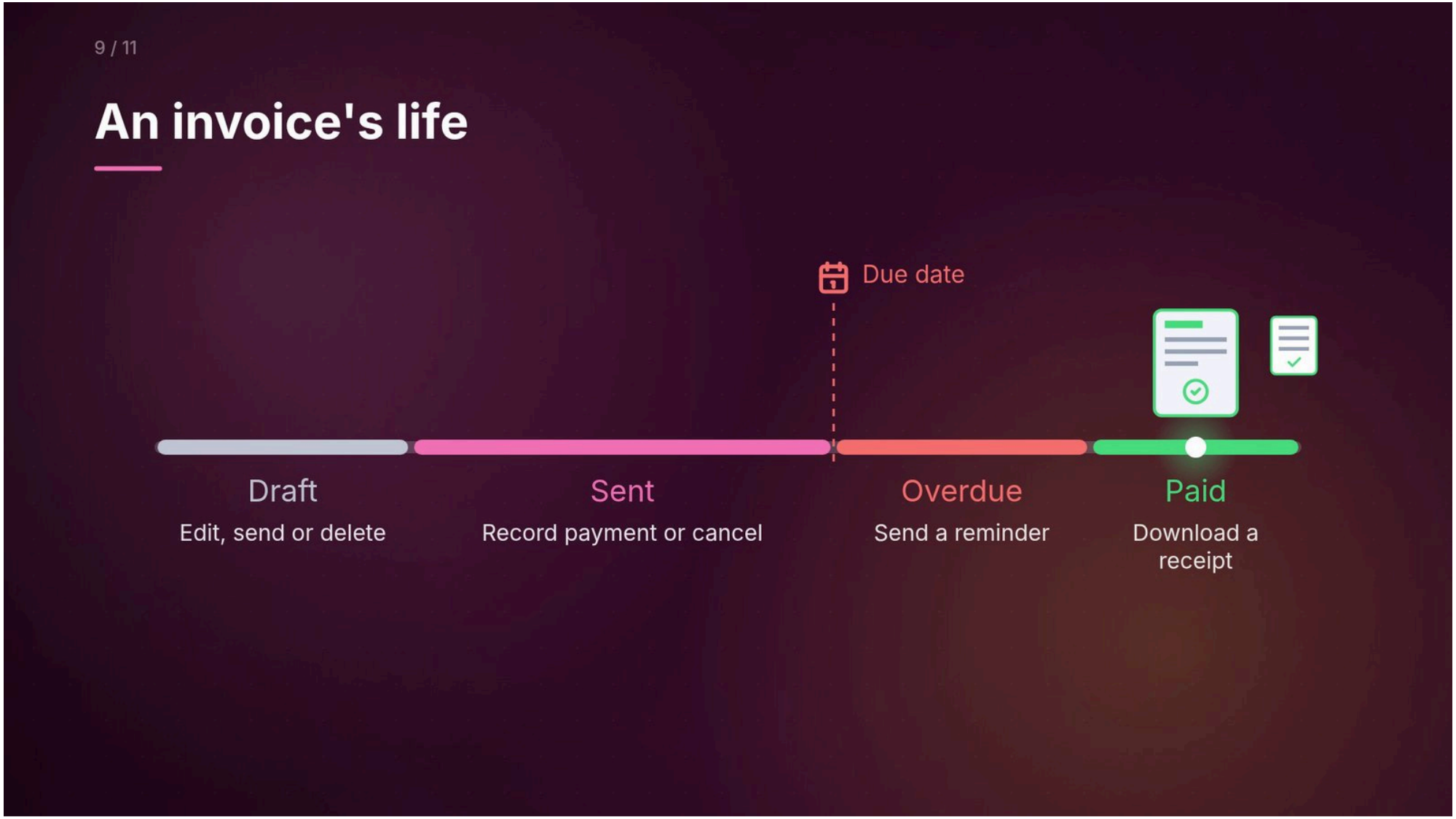
7 / 11 · Sent invoices are locked

It's easy to assume you can fix a sent invoice later. You can't. A Draft can be edited freely, but once it's sent, the number and customer are locked. To change it, cancel the invoice and create a new one, so your records stay complete.



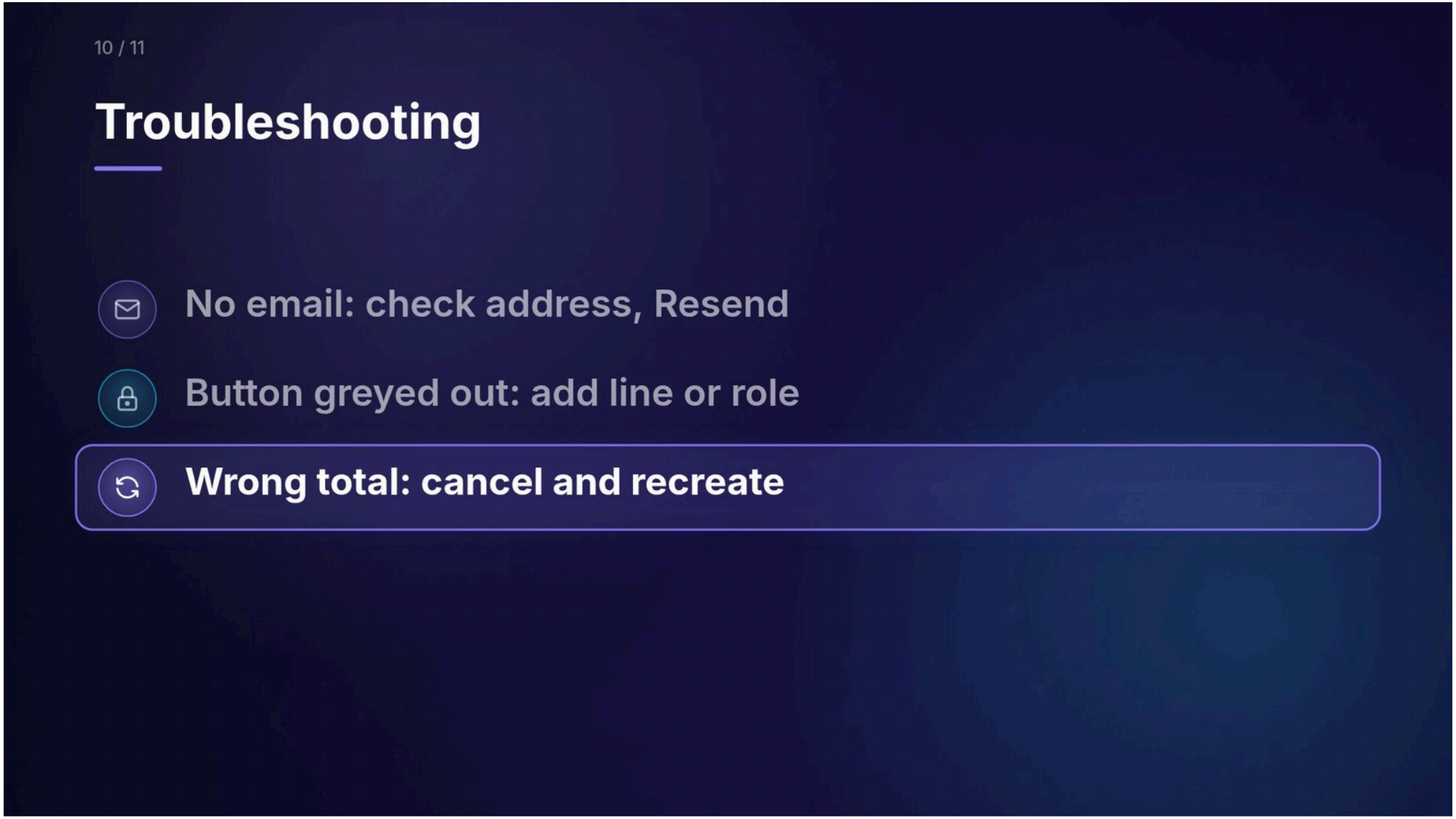
8 / 11 · Step 4: Record the payment

To track payments, open the Invoices list. The Status column shows where each invoice stands; this one is Sent. Online payments are marked Paid automatically, but for a bank transfer or cheque, select Record payment and enter the date and amount. If an invoice passes its due date, it becomes Overdue, and Send reminder emails a polite nudge with the same payment link.



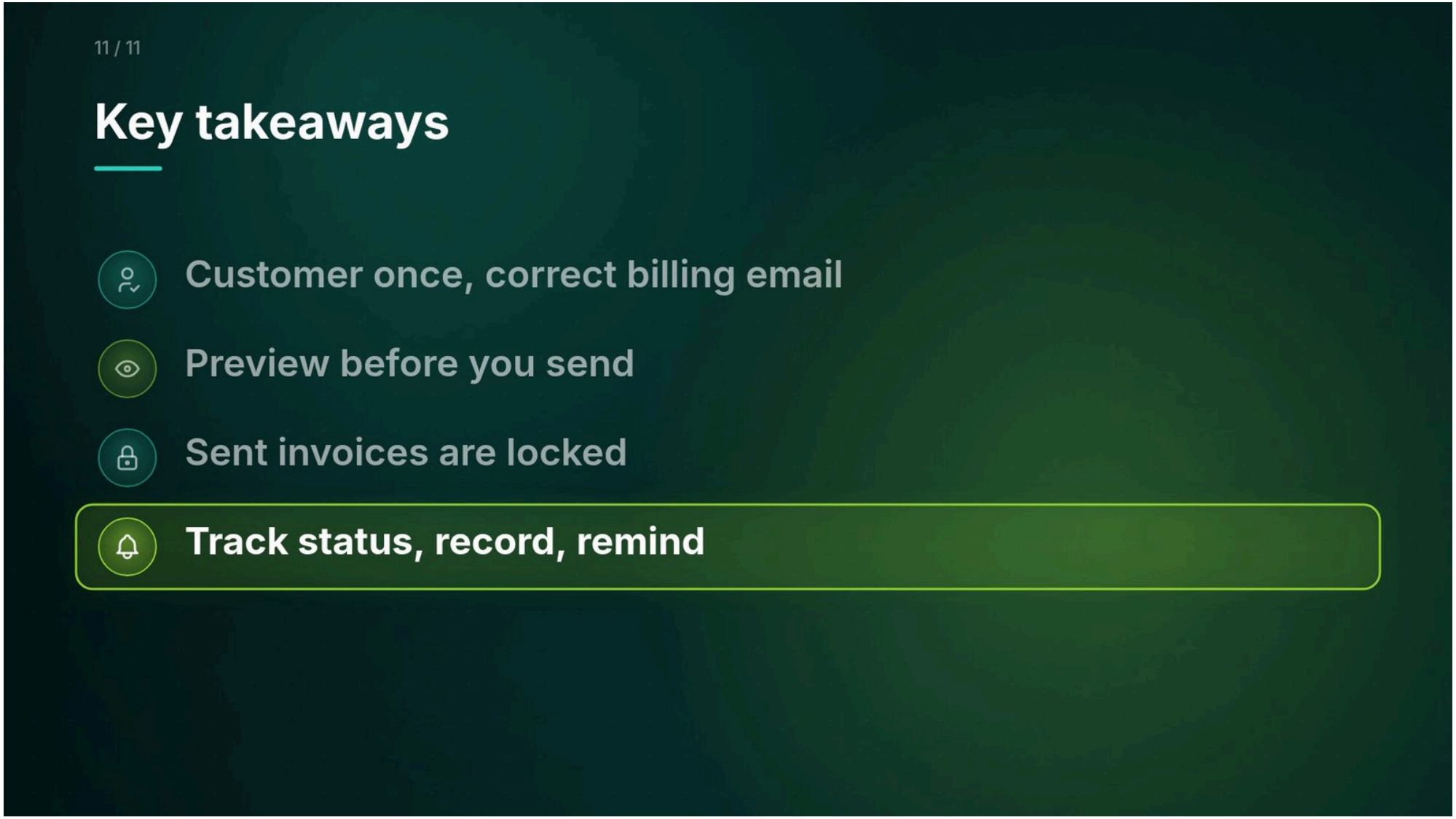
9 / 11 · What each status means

Every invoice moves through a few statuses. Draft is saved but not sent, so you can edit, send or delete it. Sent means emailed and not yet due. Overdue means past its due date and unpaid, so send a reminder. Paid means paid in full, and you can download a receipt.



10 / 11 · If something goes wrong

A few common fixes. If no email arrived, check the billing email, then open the invoice and select Resend, and ask them to check spam. If Send invoice is greyed out, add a line, or ask the owner to change your Viewer role. If the total is wrong after sending, cancel and create a new invoice.



11 / 11 · Recap

To recap: add each customer once with the right billing email and payment terms. Build the invoice line by line and preview it before sending. Remember that sent invoices are locked. Then watch the Status column, record offline payments and send reminders for overdue ones.