Create and send your first invoice

Harborline Invoicing · User guide, chapter 3 · Version 4.2 · Sample guide written for the DocReel demo

This chapter shows you how to bill a customer for the first time. You will add the customer, build the invoice, send it by email and record the payment when it arrives. The whole job takes about five minutes.

Before you start

- You need the **Owner** or **Bookkeeper** role. Team members with the Viewer role can open invoices but can't create or send them.
- Check your business details under **Settings > Company**. Your name, address and tax number are printed on every invoice.
- Have the customer's billing email ready. Invoices are sent to that address, not to the contact's personal email.

The four steps

1. **Add the customer.** You do this once for each customer.
2. **Create the invoice.** Choose the customer and add what you are charging for.
3. **Send it.** The customer gets an email with a link to view and pay.
4. **Record the payment.** Mark the invoice as paid when the money arrives.

> **Important:** an invoice can be edited freely while it is a Draft. After it is sent, the number and the customer are locked. To change a sent invoice, cancel it and create a new one, so your records stay complete.

Step 1: Add the customer

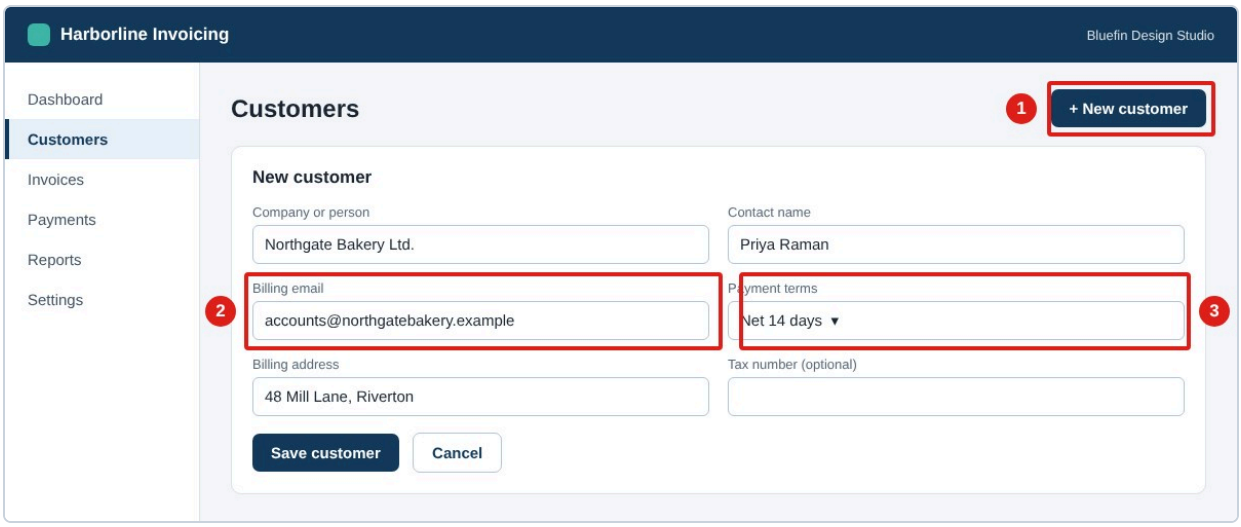


Figure 1. The New customer form on the Customers page.

1. Open **Customers** in the left menu and select **+ New customer** (1).
2. Enter the company name and the contact's name.
3. Enter the **Billing email** (2). This is where invoices and reminders are sent, so check the spelling.
4. Choose the **Payment terms** (3). “Net 14 days” means the invoice is due 14 days after you send it. The due date on each new invoice is filled in from this setting.
5. Select **Save customer**.

> **Tip:** the tax number is optional. If your customer needs it on their invoices, add it here once and it will appear on all of them.

Step 2: Create the invoice

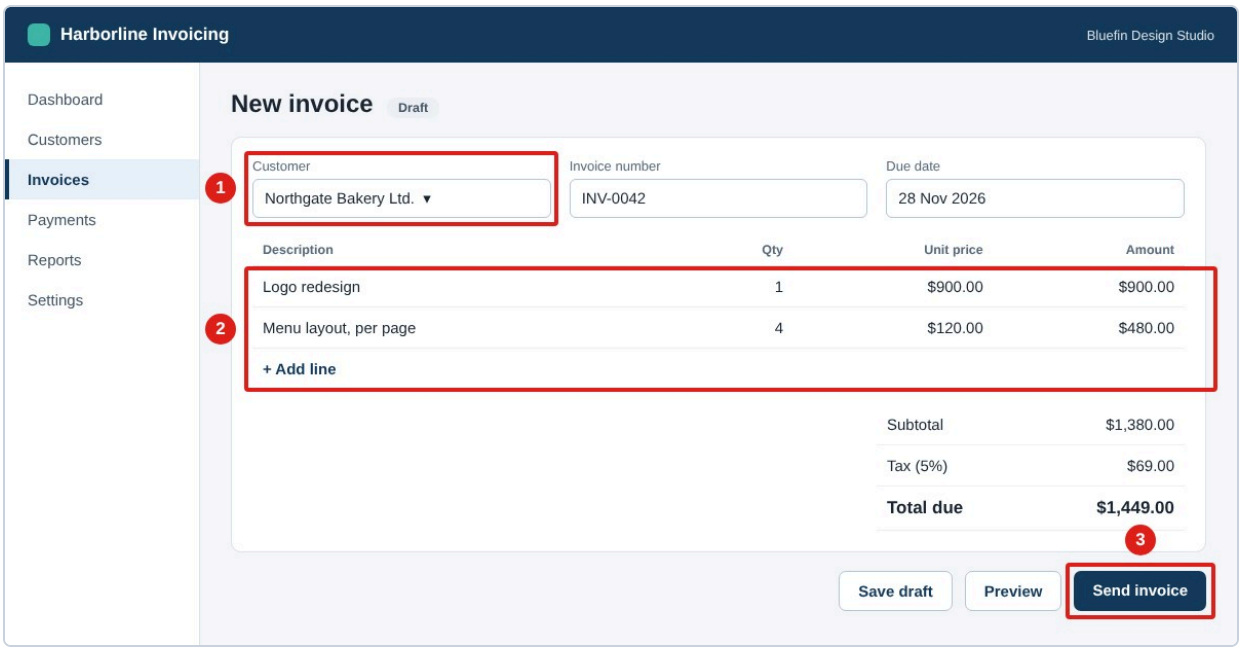


Figure 2. A new invoice in Draft, with two lines.

1. Open **Invoices** and select **+ New invoice**.
2. Choose the **Customer** (1). The invoice number and due date are filled in for you. Invoice numbers run in order and can't be reused.
3. Add a **line** for each thing you are charging for (2): a description, a quantity and a unit price. Select **+ Add line** for more. The amount, subtotal, tax and total are calculated for you.
4. Select **Preview** to see the invoice exactly as your customer will.

Step 3: Send it

1. When the preview looks right, select **Send invoice** (3).
2. The customer receives an email with a link to view the invoice and pay online. You get a copy.
3. The invoice's status changes from **Draft** to **Sent**.

> **Not ready to send?** Select **Save draft** instead. Drafts are not emailed and don't count in your reports.

Step 4: Record the payment

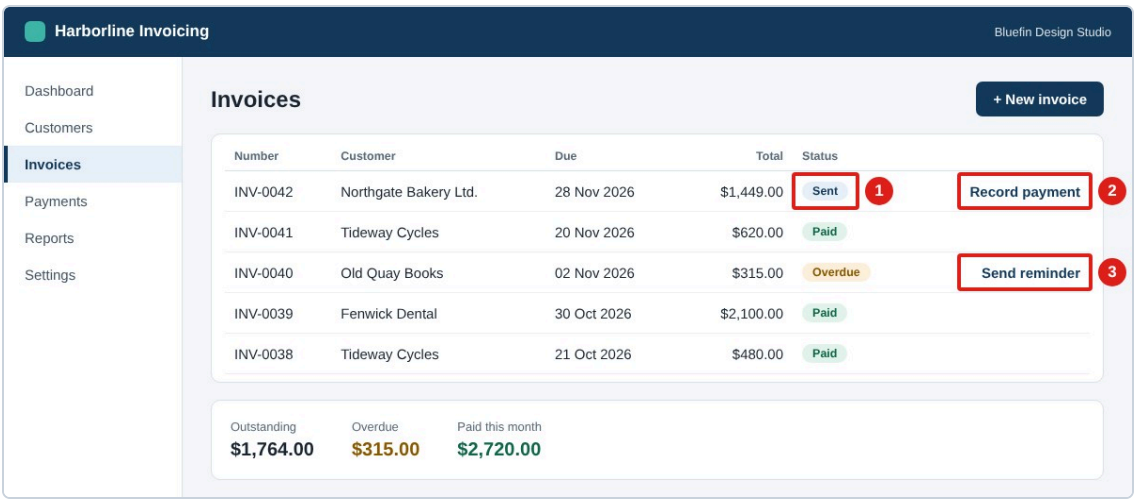


Figure 3. The Invoices list, showing each invoice's status.

1. Open **Invoices**. The **Status** column (1) shows where each invoice stands.
2. If the customer pays online, the invoice is marked **Paid** automatically.
3. If they pay by bank transfer or cheque, select **Record payment** (2), enter the date and amount, and save.
4. If an invoice passes its due date, its status becomes **Overdue**. Select **Send reminder** (3) to email the customer a polite reminder with the same payment link.

What each status means

Status	Meaning	What you can do
Draft	Saved but not sent.	Edit, send or delete it.
Sent	Emailed to the customer and not yet due.	Record a payment or cancel it.
Overdue	Past its due date and unpaid.	Send a reminder or record a payment.
Paid	Paid in full.	Download a receipt.

If something goes wrong

Problem	What to do
The customer says no email arrived.	Check the billing email on the customer's page, then open the invoice and select Resend. Ask them to check their spam folder.
Send invoice is greyed out.	The invoice has no lines, or your role is Viewer. Add a line, or ask the account owner to change your role.
The total is wrong after sending.	Cancel the invoice and create a new one. Sent invoices can't be edited.

Harborline Invoicing and the companies shown are made up. This sample guide was written for docreel.app to show how a software user guide becomes a video.