

Air4media Pilot v10

BETA

ACME Creative Agency

OWNER

ACME Creative Agency

Laurent P Groult

Dashboard

Documentation

CLIENTS

Pipeline

Projects

Budget

Contacts

Accounts

Activities

Appointments

Calendar

Invoices

Quotes

Products

Automations

DIGITAL ASSETS

FLYING LICENSE

WEBSITE

AI

SETTINGS

PLATFORM

Settings

logout

voices

Payment Rules

\$40,801,616.25

TOTAL REVENUE

\$6,402,470.34

OUTSTANDING

83

OVERDUE

1402

PAID

h...

2026

All Statuses

Create Invoice

Invoice #	Title	Account	Issue Date	Due Date	Total	Balance Due	Status	Actions
2026-2	Event Branding Proposal - Sunset Events Group — Balance	Sunset Events Group	3/18/2026	3/28/2025	\$10,895.25	\$10,895.25	draft	
2026-1	Event Branding Proposal - Sunset Events Group — Deposit (50%)	Sunset Events Group	3/18/2026	3/18/2026	\$10,895.25	\$10,895.25	sent	
IE-2026-	Digital Transformation - Brand Identity	Meridian Tech Solutions	3/15/2026	4/14/2026	\$24,090.00	\$24,090.00	draft	
IE-2026-	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	
ACME-2026-0702	Email Campaign - Pacific Coast Hospitality	Pacific Coast Hospitality	3/14/2026	4/13/2026	\$47,961.00	\$47,961.00	draft	
ACME-2026-0664	App Design - Meridian Tech Solutions	Meridian Tech Solutions	3/14/2026	4/13/2026	\$26,170.50	\$26,170.50	sent	
ACME-2026-1877	Event Branding - Bloom & Flourish Florals	Bloom & Flourish Florals	3/13/2026	4/12/2026	\$5,256.00	\$5,256.00	sent	
ACME-2026-1875	Marketing Strategy - Riverside Convention Center	Riverside Convention Center	3/13/2026	4/12/2026	\$54,202.50	\$54,202.50	draft	
ACME-2026-1581	App Design - Riverside Convention Center	Riverside Convention Center	3/13/2026	4/12/2026	\$25,294.50	\$0.00	paid	

Showing 1 to 15 of 624 records

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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