

Autobooks Invoicing

Invoicing with Autobooks is simple, fast, and efficient!

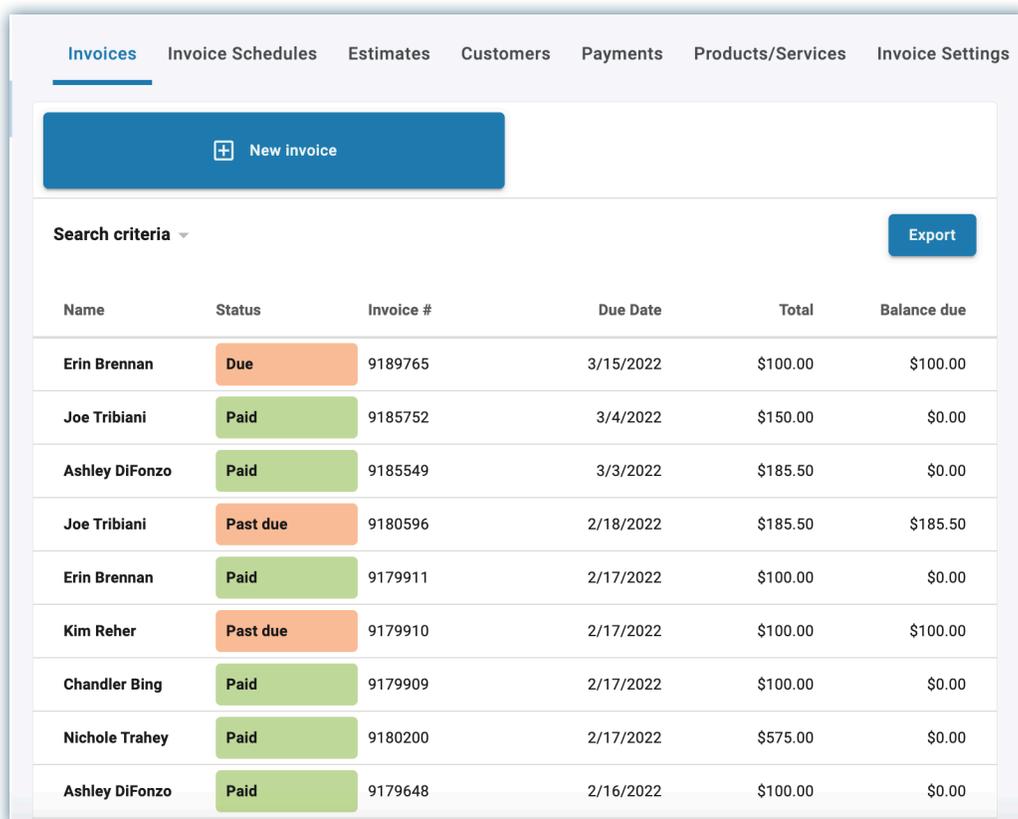
Autobooks Invoicing provides robust tools to manage the invoicing process. Business owners track invoices and payments made, can upload an unlimited number of customer and product records and can customize their invoicing template.

Business owners send invoices to their customers via email. The customers click on a link within their email to view and pay their invoice through a secure web page.

Customers who receive an invoice can pay it immediately upon receiving it electronically using all major credit / debit cards (including American Express) or ACH Transfer.

The funds will go directly into the your customer's checking account and are usually deposited within just a couple business days of the payment submission!

When sending invoices through Autobooks, business owners can even choose to enable automatic reminder messages for payment, automatic past due reminders and even automatic late fees.



The screenshot displays the 'Invoices' section of the Autobooks interface. At the top, there are navigation tabs: Invoices, Invoice Schedules, Estimates, Customers, Payments, Products/Services, and Invoice Settings. Below the tabs is a blue button labeled '+ New invoice'. Underneath is a search bar with a dropdown arrow and an 'Export' button. The main content is a table with the following columns: Name, Status, Invoice #, Due Date, Total, and Balance due. The table contains ten rows of invoice data.

Name	Status	Invoice #	Due Date	Total	Balance due
Erin Brennan	Due	9189765	3/15/2022	\$100.00	\$100.00
Joe Tribiani	Paid	9185752	3/4/2022	\$150.00	\$0.00
Ashley DiFonzo	Paid	9185549	3/3/2022	\$185.50	\$0.00
Joe Tribiani	Past due	9180596	2/18/2022	\$185.50	\$185.50
Erin Brennan	Paid	9179911	2/17/2022	\$100.00	\$0.00
Kim Reher	Past due	9179910	2/17/2022	\$100.00	\$100.00
Chandler Bing	Paid	9179909	2/17/2022	\$100.00	\$0.00
Nichole Trahey	Paid	9180200	2/17/2022	\$575.00	\$0.00
Ashley DiFonzo	Paid	9179648	2/16/2022	\$100.00	\$0.00

The screenshot shows the 'Invoices' module interface. At the top, there are navigation tabs: Invoices, Invoice Schedules, Estimates, Customers, Payments, Products/Services, and Invoice Settings. Below the tabs is a 'New Invoice' button. A search criteria section includes an 'Export' button. The main table lists invoices with the following data:

Name	Status	Invoice #	Due Date	Total	Balance due
Erin Brennan	Due	9179911	2/17/2022	\$100.00	\$100.00
Kim Reher	Due	9179910	2/17/2022	\$100.00	\$100.00
Chandler Bing	Due	9179909	2/17/2022	\$100.00	\$100.00
Ashley DiFonzo	Due	9179648	2/16/2022	\$100.00	\$100.00
Erin Brennan	Past due	9176772	2/5/2022	\$100.00	\$100.00
Kim Reher	Past due	9176466	2/4/2022	\$100.00	\$100.00
Chandler Bing	Past due	9175906	2/3/2022	\$185.50	\$185.50
Kim Reher	Paid	9171362	2/2/2022	\$371.00	\$0.00
Cristi Vernon	Cancelled	9168906	1/31/2022	\$387.00	\$387.00
Nichole Trahey	Paid	9171363	1/21/2022	\$100.00	\$0.00
Ashley DiFonzo	Cancelled	9162191	12/23/2021	\$350.00	\$350.00

All invoices are kept organized within the module and are color-coded to make reading and understanding the status of the invoice simple and intuitive.

Managing recurring invoices is a breeze! Recurring invoices are kept in an organized list for easy viewing and modification.

Businesses can take advantage of the Estimates tool to provide cost ideas before sending out an official invoice.

These estimates are managed in their own tab and business owners can turn them directly into an invoice with a simple click.

The screenshot shows the 'Estimates' module interface. At the top, there are navigation tabs: Invoices, Invoice Schedules, Estimates, Customers, Payments, Products/Services, and Invoice Settings. Below the tabs is a 'New estimate' button. A search criteria section includes an 'Export' button. The main table lists estimates with the following data:

Name	Status	Estimate #	Creation date	Expiration date	Amount
Nichole Trahey	Pending	14438	02/16/2022	02/28/2022	\$575.00
Erin Brennan	Closed	13276	08/11/2021	08/20/2021	\$100.00
Chandler Bing	Closed	12590	05/21/2021	05/22/2021	\$175.00

At the bottom of the interface, there is a pagination control showing 'Rows per page: 25' and '1-3 of 3'.

Name	Account #	Email	Phone #	Balance
Ashley DiFonzo	1182586	adifonzo+custome...		\$195.40
Chandler Bing	1122989	chandlerb@nomail...		\$1,121.00
Cindy Smith	1121565	csmith@nowhere...		\$350.00
Cristi Vernon	1181498	cvernon@autoboo...		\$0.00
Dian Lacoste	1123179	dilacoste@autobo...		\$257.50
Erin Brennan	1153897	erin.brennan@td.c...		\$200.00
Greg Asbell	1130157	Gasbell@northstat...		\$0.00
Joe Tribiani	1122987	jtrib@nomail.com		\$450.00
Kim Reher	1171819	kim.reher@gmail.c...		\$0.00
Kim Reher	1213696	Kreher+test@auto...		\$200.00

Business owners can load an unlimited number of customers to keep track of their payments and balances. An unlimited number of products and services can also be added.

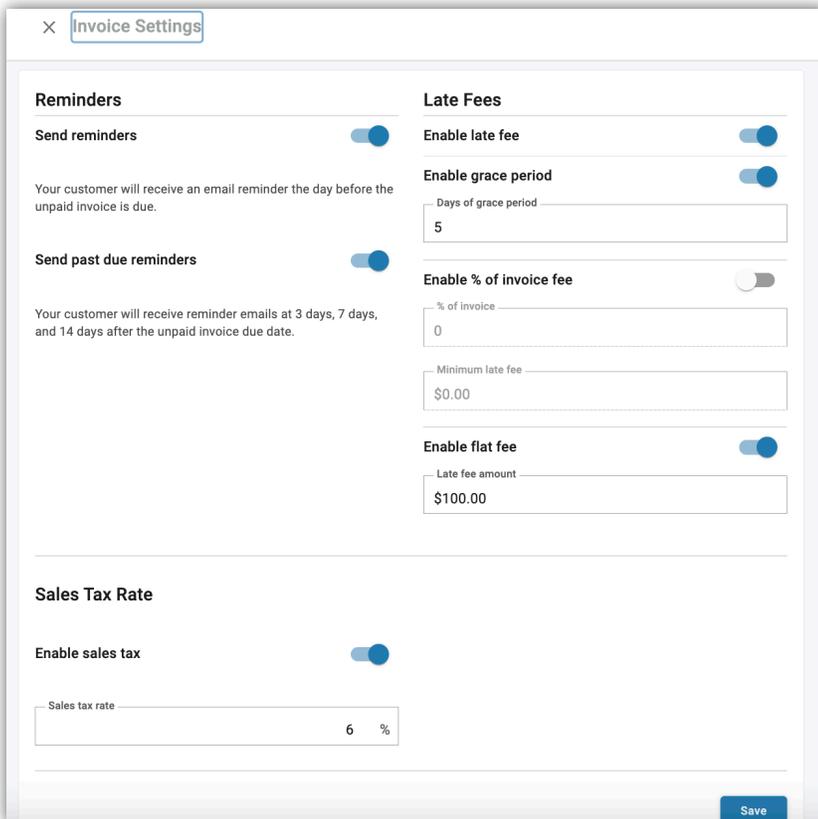
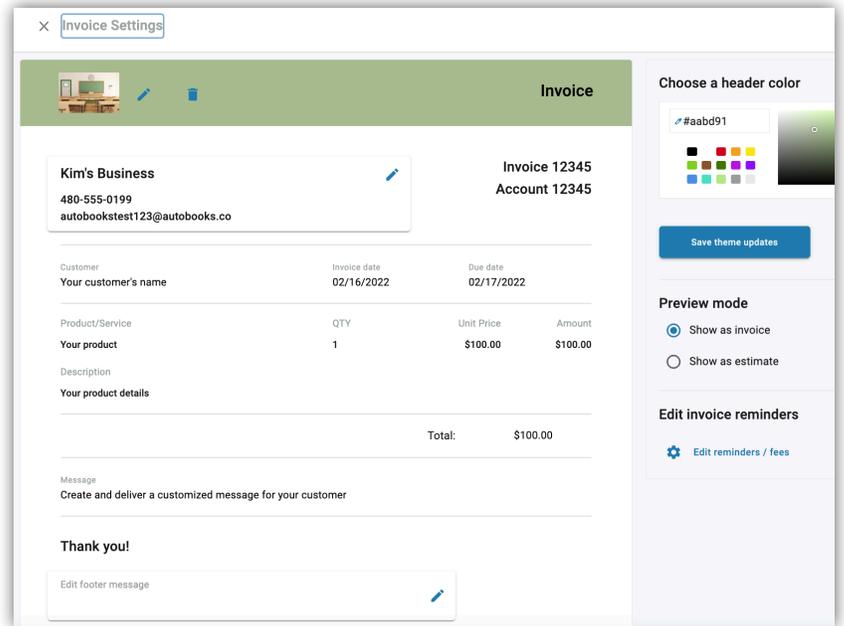
Customers and products / services can be added into the list manually, or can be added at the time of creating an invoice.

Business owners can track payments received under the Payments tab. All payments, payment method types, and balances can be seen. Refunds can also be managed through this page.

Name	Payment type	Date	Source	Amount paid
Kim Reher	MasterCard	02/03/2022	Invoice	\$371.00
Nichole Trahey	MasterCard	01/20/2022	Invoice	\$100.00
Kim Sherman	MasterCard	01/13/2022	Invoice	\$90.00
Ashley DiFonzo	MasterCard	01/13/2022	Invoice	\$100.00
Cindy Smith	MasterCard	01/13/2022	Invoice	\$100.00
Kim Sherman	MasterCard	01/13/2022	Invoice	\$100.00
Rachel Green	MasterCard	01/13/2022	Invoice	\$100.00
Chandler Bing	MasterCard	01/13/2022	Invoice	\$100.00
Ashley DiFonzo	Visa	10/22/2021	Invoice	\$85.00
Joe Tribiani	Visa	09/28/2021	Invoice	\$100.00
Joe Tribiani	Visa	07/15/2021	Invoice	\$100.00
Chandler Bing	Visa	07/15/2021	Invoice	\$1,032.50
Cindy Smith	Visa	04/19/2021	Invoice	\$100.00

Invoice templates can be customized by the business owner.

Business owners can upload their company logo, change the colors to match company branding and create custom messages.



The business owner may enable automatic reminder emails for upcoming and past-due invoices.

Late fees, grace periods and sales tax rates can also be enabled and modified within the settings.

These features only need to be set up one time in order to apply to all invoices.