

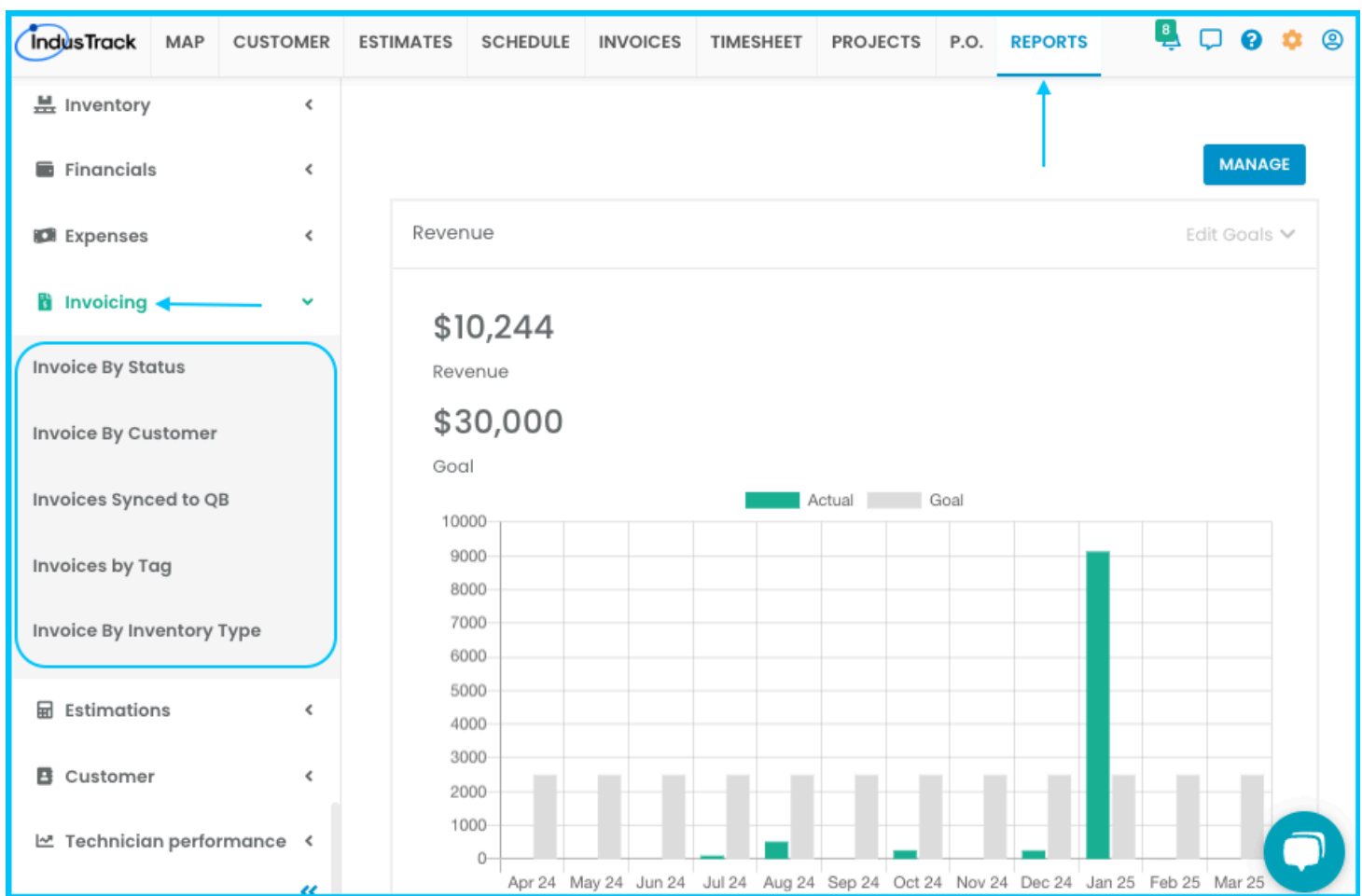
# Invoicing Report

Download Invoicing Report PDF

Invoicing reports help you track and manage your invoices over a specific period. They provide insights into payments, sales, and overall financial status. These reports include details like invoice number, customer details, payment terms, invoice date, due date, amount owed, and payment status.

## How to Access Invoicing Reports

1. Click on **Reports** in the left-hand menu.
2. Select **Invoicing** from the dropdown.
3. Choose the type of report you need:
  - **Invoice By Status** – View invoices by their payment status.
  - **Invoice By Customer** – See invoices grouped by customers.
  - **Invoices Synced to QB** – Check invoices synced with QuickBooks.
  - **Invoice By Tag** – Filter invoices by assigned tags.
  - **Invoice By Inventory Type** – Analyze invoices by product type.



## Invoice By Status

This report shows invoices based on their status:

- Unpaid
- Overdue
- Paid
- Sent
- Viewed
- Partially Paid

Here are the details of the report:

- **Date:** Creation date of the invoice.
- **Number:** Invoice number.
- **Company:** Name of the invoiced company.
- **Location:** Delivery location.
- **Due Date:** Payment deadline.
- **Total:** Total cost of goods.
- **Balance:** Outstanding amount.
- **Status:** Current invoice status.
- **Est #:** Estimate number.
- **Job #:** Associated job number.
- **Term:** Payment terms.
- **Description:** Invoice details.
- **Discount:** Applied discount.

### How to Generate This Report

1. Click **Reports > Invoicing > Invoice By Status**.
2. Select a **status** (one at a time).
3. Choose a **date range** or a predefined period (Today, Last Week, etc.).
4. Click **Get Report**.



5. Export the report as **Excel or PDF** using the **Actions Button**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET PROJECTS P.O. **REPORTS**

### Invoice By Status Report

Paid

Start Date 2/1/2025 End Date 3/4/2025 **GET REPORT**

Yesterday Today Last Week This Week Last Month This Month

Date...	Nu...	Co...	Loca...	Due ...	Total	Bala...	Stat...	Est #	Job ...
02/10...	<u>3702</u>	<u>Acai Super Malls</u>	20 B Inlan... Drive, B, Ham... Virgin... 23669		\$2.00	\$0.00	Paid		<u>3073</u>
<b>Total:</b>					<b>\$2.00</b>	<b>\$0.00</b>			

1 - 1 of 1 items

Actions

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites

### Actions Button Options

- **Export to PDF**
- **Export to Excel**
- **Configure Report Columns** – Customize which columns appear.
- **Schedule Report** – Set automatic reports.
- **Add to Favorites** – Quick access to frequently used reports.



### Invoice By Customer Report

This report provides invoice details grouped by customer.

## How to Generate This Report

1. Click **Reports > Invoicing > Invoice By Customer**.
2. Select a **customer** (one at a time).
3. Choose a **date range**.
4. Click **Get Report**.
5. Export the report as **Excel or PDF**.

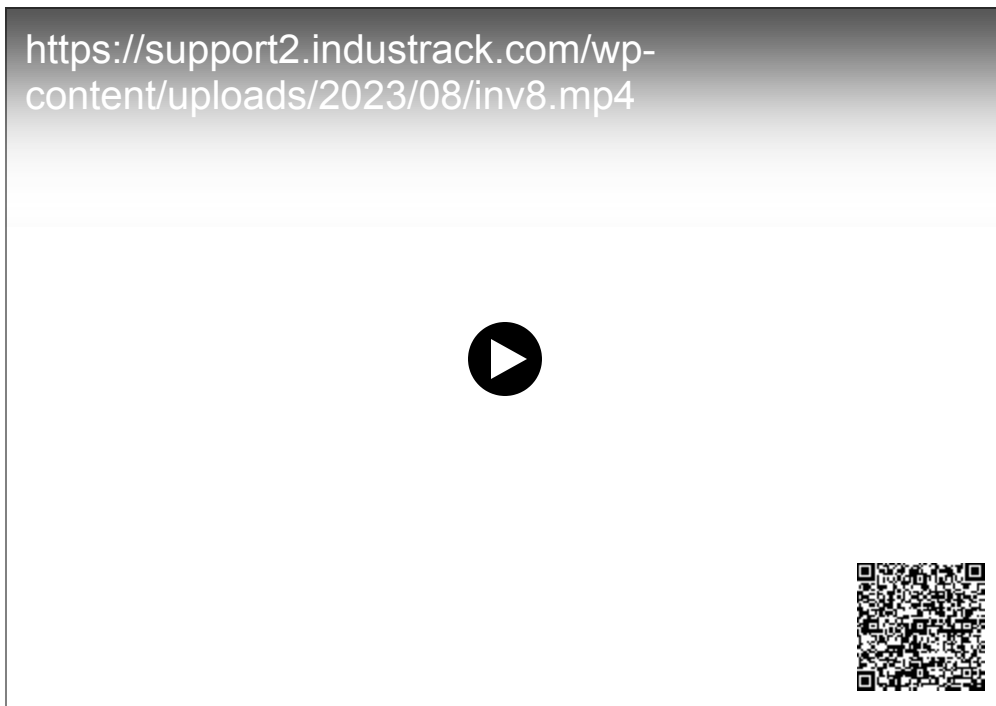


## Invoices Synced to QB Reports

View invoices that have been synced with QuickBooks.

### How to Generate This Report

1. Click **Reports > Invoicing > Invoice Synced to QB**.
2. Select a **date range**.
3. Click **Get Report**.
4. Export the report as **Excel or PDF**.

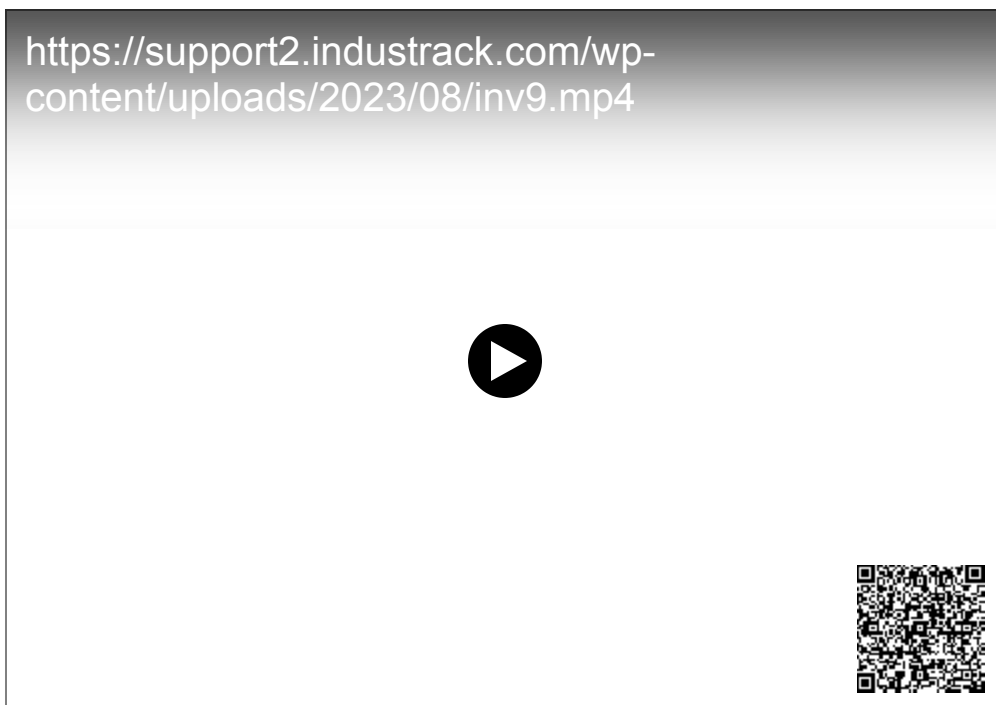


## Invoice by Tag Report

This report allows you to filter invoices based on specific tags.

### How to Generate This Report

1. Click **Reports > Invoicing > Invoice By Tag**.
2. Select one or multiple **tags**.
3. Choose a **date range**.
4. Click **Get Report**.
5. Export the report as **Excel or PDF**.



## Invoice by Inventory Type Report

This report shows invoices based on product types (Services, Inventory, Non-Inventory, Equipment).

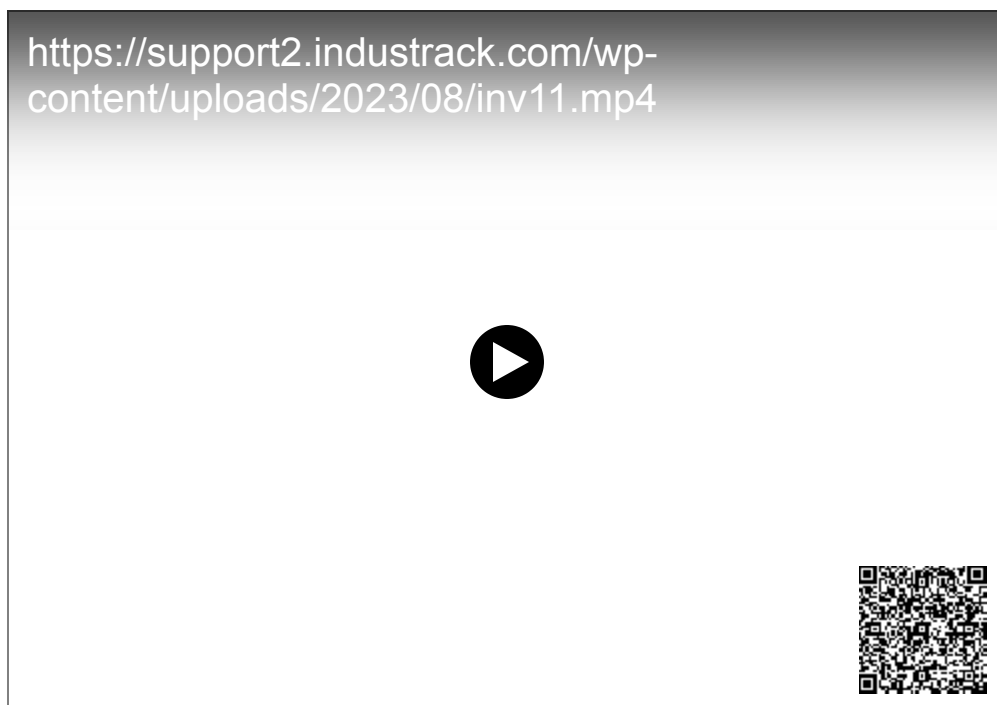
## How to Generate This Report

1. Click **Reports > Invoicing > Invoice By Inventory Type**.
2. Select one or multiple **customers**.
3. Choose a **date range**.
4. Click **Get Report**.
5. Export the report as **Excel or PDF**.



## Additional Features

- **Configure Report Columns** – Hide or show specific columns.
- **Add to Favorites** – Quick access to frequently used reports.



This guide simplifies invoice tracking and management, helping you gain better control over your business finances.

