

Invoice — SOP

How this module works

Create GST-ready invoices, track payments automatically, and send them straight to clients on WhatsApp — from quote to cash collected, all in one place.

SECTIONS

● Create Build an invoice with line items, GST auto-split (CGST+SGST or IGST) and rounding.	● All Invoices tab Every invoice, its status, and quick actions — filterable by status pills.
● Payment Tracker tab Every unpaid invoice with days-overdue, a recovery-step tracker, and one-click WhatsApp reminders.	● Aging & Recurring tab How much is owed by how overdue it is, plus every auto-billing template (weekly/monthly/quarterly/yearly).
● Money Dashboard tab This month's revenue, expenses, profit, GST collected, and outstanding — one screen, no digging.	● GST Report Month-wise CGST/SGST/IGST breakup, ready for filing.
● Statement A client's full invoice + payment history on one page.	

STEP-BY-STEP WORKFLOW

1	Create invoice → pick client, add items, GST auto-detected from company + client GSTIN.
2	Save & Send → download the PDF or send it straight on WhatsApp.
3	Record Payment → as money comes in, log it (partial payments supported) — status and balance update instantly.
4	Auto-tracked → status flips to Paid/Overdue on its own; check the Payment Tracker tab for what needs chasing today.
5	Everything else — Aging, Recurring templates, and the Money Dashboard — lives in its own tab above the invoice list, so nothing is more than one click away.

CONNECTIONS

● Leads Creating an invoice auto-links (or creates) the client as a Lead and marks the deal Converted; getting paid updates that lead's Total Revenue automatically.	● Bank Recording a payment against a chosen bank account creates a real credit entry there too — the bank balance and invoice status can never drift apart.
● Incentives A sales person on the invoice against a matching slab earns a Pending incentive automatically — it only turns Confirmed once the invoice is fully paid, not just billed.	● Lead Activity Every invoice milestone — created, sent, paid, payment recorded, PDF downloaded — logs to the client's activity timeline, visible from their Lead profile.

