



Getting Started with

Presented by Infiniroot
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This guide covers Invoice Ninja v4.

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What is Invoice Ninja?

Invoice Ninja is an **application for creating and managing your own invoices**. If you run a company, you send invoices for your goods or services. This is where Invoice Ninja helps you: Creating invoices, managing customers, tracking time with tasks, etc.

As it runs on a (web) server, the application is launched in your web-browser, such as Firefox, Chrome, Edge, Safari or any other browser.



Getting started with Invoice Ninja v4

What are the costs for Invoice Ninja?

Invoice Ninja is a so-called Open Source application. The code itself is free. However infrastructure (server) costs are invoiced by the hosting provider. There is also a so-called “Whitelabel” license fee. This license removes the Invoice Ninja logo from the created invoices - your invoices look more professional this way.

The Whitelabel license is an annual fee of \$30 (as of this writing). In the Infiniroot managed Invoice Ninja offer, this license is already included in the infrastructure costs.

Where can I get Invoice Ninja?

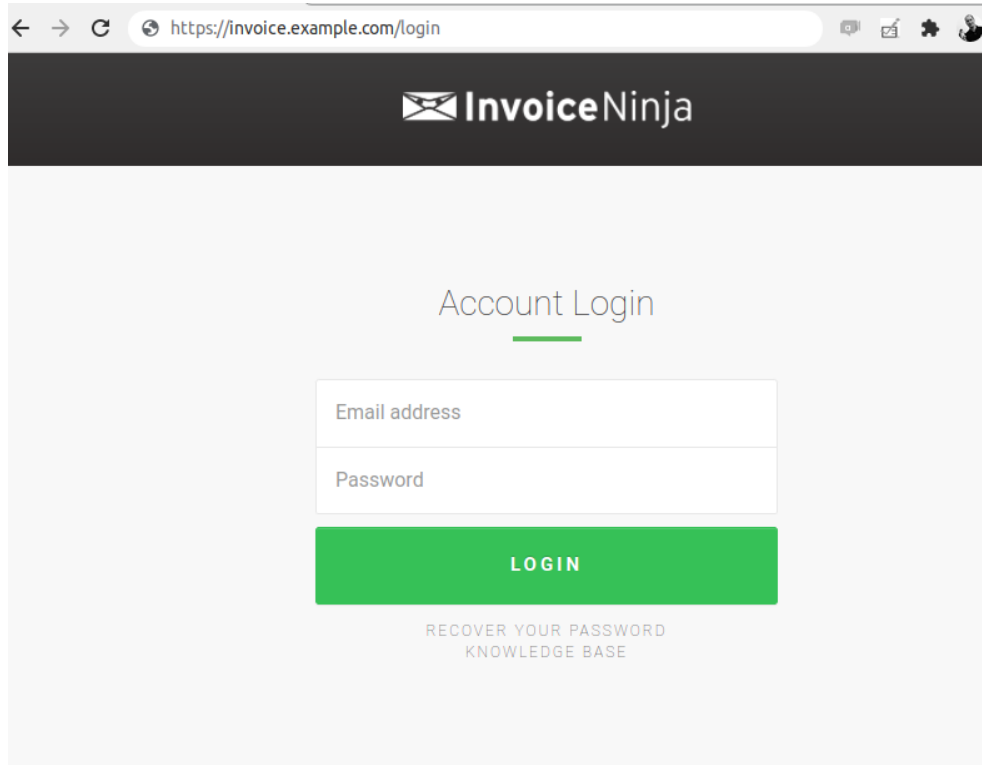
There are a couple of different options. You can download (www.invoiceninja.org) and install Invoice Ninja on your own web-server if you have one. This “self-hosted” way of running Invoice Ninja requires technical knowledge and understanding how to (securely) run a web server. You can also use the existing “Invoice Ninja as a service” from www.invoiceninja.com. Or you can combine the application with a dedicated managed server for additional security, data privacy (Server location Switzerland) and your own domain on www.infiniroot.com.



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Account Login

Once you have received your login credentials, open your web-browser and enter the URL (web address) mentioned in the login information.



Enter the email address and the password. These access credentials are part of the e-mail, once your server is ready.

Note: For security reasons you should change the password after your first login.

After successfully logged in, you are seeing the “Dashboard”. This is an overview of all invoices and payments over the last period (by default the last 30 days).



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The screenshot shows the Invoice Ninja dashboard interface. On the left is a dark navigation sidebar with icons and labels for: Dashboard, Clients, Products, Invoices, Payments, Recurring, Credits, Quotes, Proposals, Projects, Tasks, Expenses, Vendors, Reports, and Settings. The main dashboard area has a blue header with the Invoice Ninja logo, a search bar, and a date range selector set to 'Jan 8, 2022 - Feb 6, 2022'. Below the header are three summary cards: 'Total Revenue \$0.00 Last 30 Days', 'Average Invoice \$0.00 Last 30 Days', and 'Outstanding \$0.00 Last 30 Days'. A line chart below these cards shows 'Invoices' (blue line) and 'Payments' (green line) over time, with both lines flat at \$0.00. At the bottom, there are two sections: 'Activity' (empty) and 'Recent Payments' (table with columns: Invoice #, Client, Payment Date, Amount).

On the left side you see the “navigation”, in which you can change into a certain section.



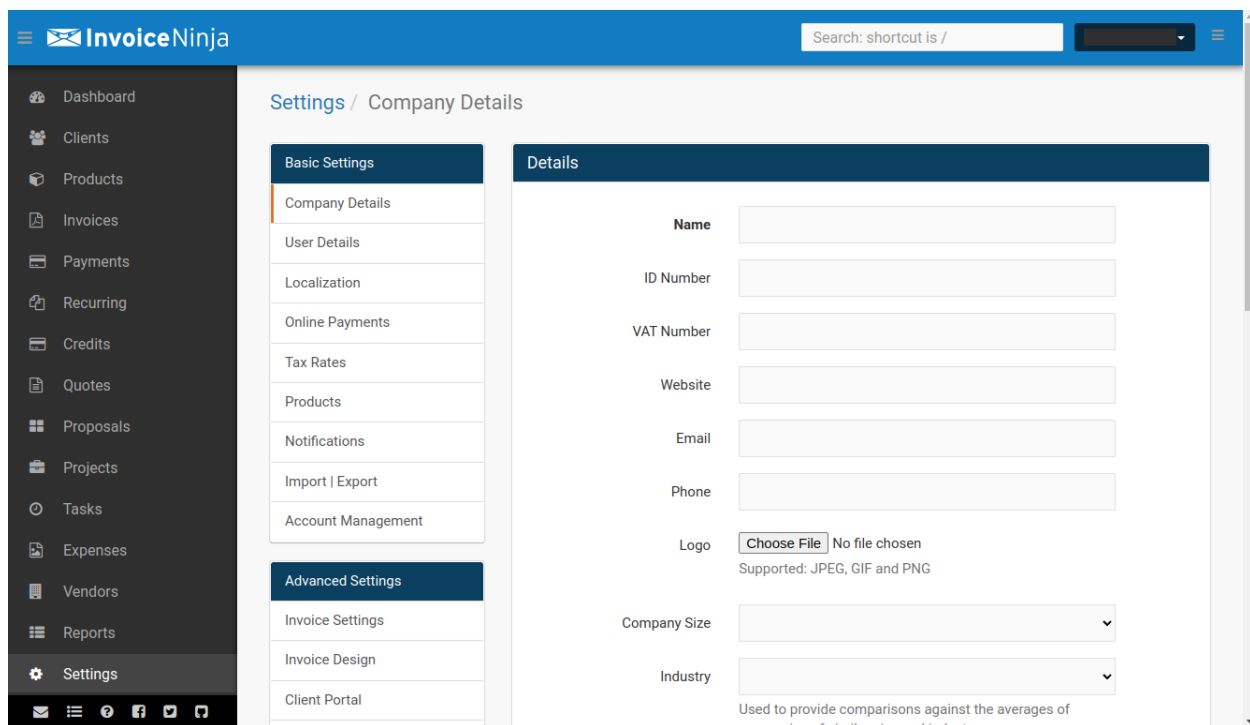
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Before starting: Adjust Settings

Settings: Enter Company details

Before you can start creating invoices, you first need to enter some basic information about your own company and your company logo. This information will be shown on the invoices.

In the Navigation, select Settings, then under “Company Details” enter the relevant information about your own company.



Make sure you don't forget to enter the address information either, when you scroll down the page a bit. At the bottom of the page, you can define the defaults for invoices:

Payment Type: The way you prefer your invoices to be paid. If you don't intend to use online payments (such as Credit Cards or Online Payment Services such as Google Pay or Apple Pay), select Bank Transfer.

Payment Terms: The time after which you expect a payment of an invoice. Widely used options are “Net 10” or “Net 30”.



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Settings: Localization

Invoice Ninja's default setting is set to be using US Dollar as currency. To adjust the default settings to your own country, click on "Settings" in the Navigation, then on "Localization".

This allows you to change the currency, the language of Invoice Ninja and other date and time related settings:

The screenshot shows the 'Localization' settings page in Invoice Ninja. The left sidebar contains a menu with 'Basic Settings' and 'Advanced Settings' sections. The 'Localization' option is highlighted in the 'Basic Settings' section. The main content area shows the following settings:

- Currency: Swiss Franc
- Language: German (with a link to [Transifex.com](https://www.transifex.com) to help improve translations)
- Timezone: (GMT+01:00) Berlin
- Date Format: 31.12.2022
- Date/Time Format: 31.12.2022 12:00 am
- 24 Hour Time: Enable
- First Day of the Week: Monday (Used by date selectors)
- First Month of the Year: January (Used by date range selectors)

Note: If you set the language of Invoice Ninja to a different language than English, the translation for the name of the months might not appear correctly in the final invoices. As a workaround, we suggest to use "Date Format" and "Date/Time Format" to use the number of month (12), instead of the name of the month (December).

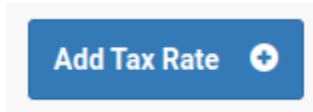


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Settings: Tax Rates

Most countries use tax rates on products and services (VAT - Value Added Tax), invoiced to customers. If your company is also subject to VAT, you can add a tax rate in the settings.

In the navigation, click on “Settings”, then on “Tax Rates”. Then click on the blue “Add Tax Rate” button.



There are **two types of Tax Rates** you can create:

Exclusive: All the products of your invoice are calculated together to a sum. To this sum, the tax rate is added. Typically the calculation would be: Total = Product(s) + Taxes. **This option applies to most countries and companies.**

Inclusive: All the **prices of your invoice already contain the tax rate**. Invoice Ninja will then subtract the tax rate from the total sum of the invoice, to specifically show the amount of taxes applied to the invoice.

Add Tax Rate

Name	<input type="text" value="VAT"/>
Rate	<input type="text" value="7.7"/> %
Type	<input checked="" type="radio"/> Exclusive: $100 + 10\% = 100 + 10$ <input type="radio"/> Inclusive: $100 + 10\% = 90.91 + 9.09$

Inclusive tax rates adjust the line item cost when selected.
Only exclusive tax rates can be used as a default.



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Advanced Settings: Invoice Numbering/Counter

By default, the invoice numbers are created by a counter. The first invoice would be “Invoice #0001”, the second “#0002” and so on. This might suit a lot of companies, but others might want to create a specific invoice number.

To change the invoice numbering, click on “Settings” in the navigation, then click on “Invoice Settings”. At the top of the page you can see “Generated Numbers”. This section defines how invoice numbers (and numbers for quotes and clients) are created.

By switching to “Pattern”, specific information, such as customer number or date information can be added into the invoice number:

With this example (`{Year}.{clientIdNumber}.{clientCounter}`), the invoice number would be: “2022.1.1” where 2022 is the current year, “1” the customer ID, and the final “1” the invoice ID (per customer).

With a click on the blue question mark, all available dynamic fields are shown.

The same setting can also be used for the quotes, in the “Quote Number” tab.



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Advanced Settings: Custom Fields

Invoice Ninja allows to create two custom fields in different categories:

- Products
- Clients (Customers)
- Invoices
- Tasks
- Expenses
- Company

Under most circumstances, custom fields are not necessary. However they can be helpful to add specific information into an invoice, which is not part of the default information.

To create custom fields, select “Settings” in the navigation, then click on “Invoice Settings” and scroll down to “Custom Fields”.

As a practical example, a customer of yours might use an internal reference number which needs to be added on the invoice (Purchase Order number, Reference number, etc). This would typically apply to the invoice, so a new invoice field can be created:

After saving this page, the custom field “Reference/P.O.” can then be selected to be shown in the Invoice Design under [Invoice Fields](#)..



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Advanced Settings: Email Settings

The default setting for Invoice Ninja is to send e-mails using your own dedicated server. You can however use an existing mail-account.

To change the technical behaviour of how e-mails should be sent from Invoice Ninja, select “Settings” in the navigation, then click on “System Settings” and scroll down to “Email Settings”.

The default is to use the “Mail” driver, which sends e-mails from the Invoice Ninja server. By changing to the “SMTP” driver, a mail account can be added. Use your existing mail account credentials - you should get this information from your mail provider.

Email Settings

Driver	<input type="text" value="SMTP"/>
From Name	<input type="text" value="Infiniroot"/>
From Address	<input type="text" value="invoicing@infiniroot.com"/>
Username	<input type="text" value="invoicing@infiniroot.com"/>
Host	<input type="text" value="mail.infiniroot.com"/>
Port	<input type="text" value="587"/>
Encryption	<input type="text" value="SSL"/>
Password	<input type="password" value="....."/>

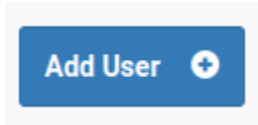


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Advanced Settings: Additional Users

If your company has a decent size, you might have multiple employees working for you and handling invoices. For this purpose multiple users can be created.

To create a new user, click on “Settings” in the navigation, then click on “User Management”. With a click on the blue “Add User” button, a new user can be created:



Besides the basic information used for login (First Name, Last Name and Email address), the new user can be granted specific permission inside Invoice Ninja. The permissions allow to fine-tune what a user can do in which category.

For example if the additional user is only able to view and edit existing information but cannot create new invoices or customers, only select the view and edit columns.

Permissions			
	<input type="checkbox"/> Administrator		
	Allow user to manage users, change settings and modify all records		
	<input type="checkbox"/> Create	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit
Client	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Credit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expense	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



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Invoice Design

Select a Design

Invoice Ninja offers a couple of pre-defined designs. The designs can be previewed in the integrated PDF viewer. By default, the “Clean” invoice design is selected.

To view or select another design, click on “Settings” in the navigation, then click on “Invoice Design”. In the General Settings tab, the Invoice Design can be changed to a different design (here: Modern). The preview window below immediately changes and gives you an idea of the new invoice design.

The screenshot shows the 'Invoice Design' settings page. It has tabs for 'General Settings', 'Invoice Labels', 'Invoice Fields', 'Product Fields', and 'Invoice Options'. Under 'General Settings', there are dropdown menus for 'Invoice Design' (set to 'Modern'), 'Quote Design' (set to 'Clean'), 'Body Font' (set to 'Roboto'), and 'Header Font' (set to 'Roboto'). There are also input fields for 'Page Size' (A4), 'Font Size' (9), 'Primary Color', and 'Secondary Color'. A note at the bottom states: 'Note: the primary color and fonts are also used in the client portal and custom email designs.' Below the settings are 'Customize' and 'Save' buttons.

The PDF preview shows an invoice with the following details:

- Invoice Number: 0000
- Invoice Date: Feb 6, 2022
- Balance Due: \$99.00
- Reference ID: 0000

Sample Client:
10 Main St.
New York, NY 10000
contact@gmail.com

Item	Description	Unit Cost	Quantity	Tax	Line Total
Item	Notes	\$100.00	1	10%	\$0.00
Subtotal					\$90.00
Tax 10%					\$9.00
Paid To Date					\$0.00
Balance Due					\$99.00

Note: Very advanced users can adjust the designs in detail, using the blue “Customize” button. However this requires in-depth knowledge of the pdfmake syntax and can be quite complex.



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Invoice Fields

To change what kind of information should appear in an invoice, click on “Settings” in the navigation, then click on “Invoice Design” and select the tab “Invoice Fields”.

Fields can be removed (red cross icon) or added by opening up the drop down menu and click on a field name.

General Settings Invoice Labels **Invoice Fields** Product Fields Invoice Options

Invoice Fields	Client Fields	Company Fields	Company Fields
Invoice Number	Client Name	Company Name	Street
PO Number	ID Number	ID Number	Apt/Suite
Invoice Date	VAT Number	VAT Number	City/State/Postal
Due Date	Street	Website	Country
Balance Due	Apt/Suite	Email	
Partial Due	City/State/Postal	Phone	
✖ Reference/P.O.	Country		
	Contact Email		

Drag and drop fields to change their order and location Reset

We can also find the custom fields created by you here again (see the “Reference/P.O.” custom field in the list of Invoice Fields).

The integrated preview below, immediately shows how the invoice would look like with the currently used fields:

INVOICE

Invoice Number	0000	Sample Client
Invoice Date	Feb 6, 2022	10 Main St.
Balance Due	\$99.00	New York, NY 10000
Reference/P.O.	0000	contact@gmail.com

Item	Description	Unit Cost	Quantity	Tax	Line Total
Item	Notes	\$100.00	1	10%	\$90.00
Subtotal					\$90.00
Tax 10%					\$9.00
Paid To Date					\$0.00
Balance Due					\$99.00



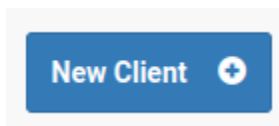
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Working with Invoice Ninja

Now let's start to use Invoice Ninja, shall we?

Creating a Customer (Client)

Before an invoice (or quote) can be created, you need to create a customer first. A customer is called "Client" in Invoice Ninja. Click on "Clients" in the navigation and click on the blue "New Client" button to create a new client:



A lot of information can now be added when creating a client. As a client can be a small or a large company, you may have multiple contacts of the same company. They can all be added as contacts. You can also overwrite the Invoice Ninja default settings by using a different currency or payment terms for this specific client:

Details	
Name	ACME Inc.
ID Number	
VAT Number	
Website	https://www.example.com
Phone	

Address	
Billing Address	Shipping Address
Street	Fake Tunnel Street
Apt/Suite	
City	Toon Town
State/Province	
Postal Code	99999
Country	Faroe Islands

Contacts	
First Name	Duffy
Last Name	Duck
Email	duffy@example.com
Phone	
	Remove contact -
First Name	Bugs
Last Name	Bunny
Email	bugs@example.com
Phone	
	Remove contact -
	Add contact +

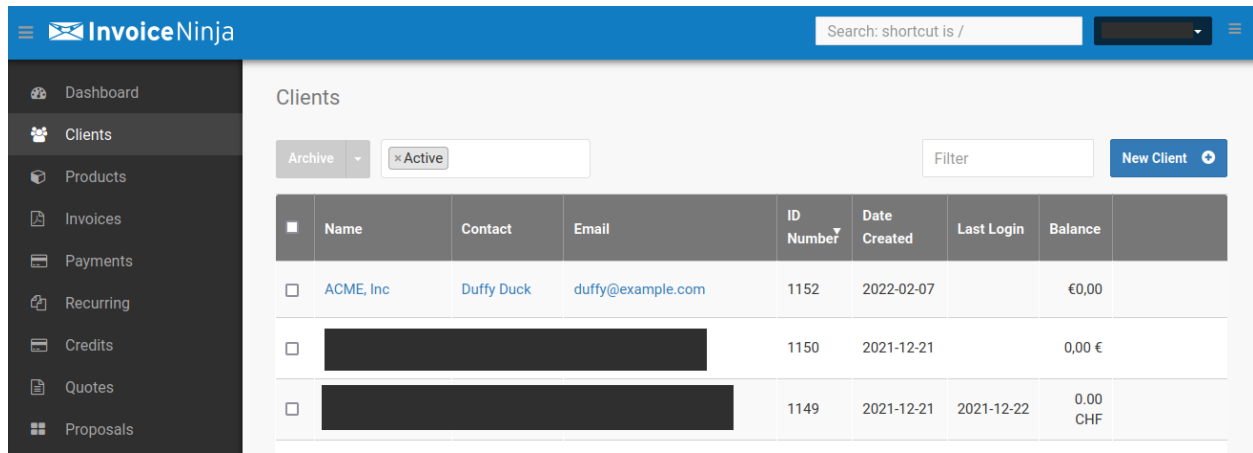
Additional Info	
Settings	Notes Messages Classify
Currency	Euro
Language	German
Payment Terms	Net 7

The Client ID (ID Number) can be set manually or if left blank, Invoice Ninja will create a new ID by using a counter (see [Invoice Numbering](#)).



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Once the new client is saved, you can see the client in the list under “Clients”.

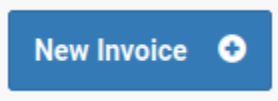


The screenshot shows the Invoice Ninja interface. The top navigation bar includes the Invoice Ninja logo, a search bar with the text "Search: shortcut is /", and a menu icon. The left sidebar contains navigation items: Dashboard, Clients, Products, Invoices, Payments, Recurring, Credits, Quotes, and Proposals. The main content area is titled "Clients" and features a table of client records. Above the table, there are filters for "Archive" (set to "Active") and a "Filter" input field, along with a "New Client" button. The table has columns for Name, Contact, Email, ID Number, Date Created, Last Login, and Balance.

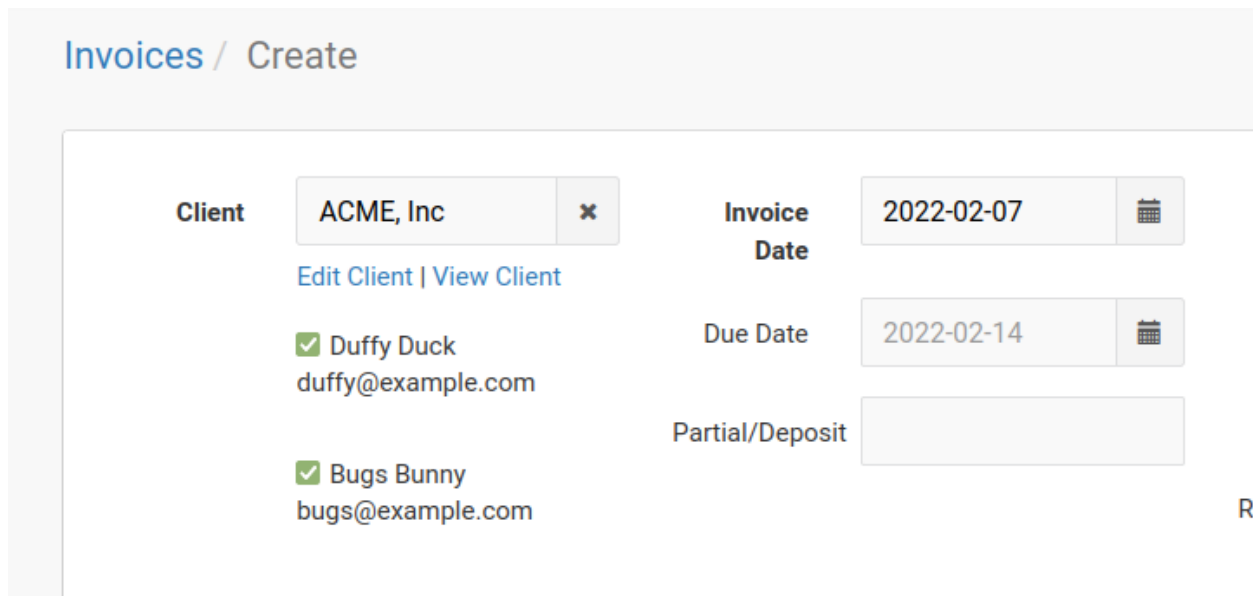
	Name	Contact	Email	ID Number	Date Created	Last Login	Balance
<input type="checkbox"/>	ACME, Inc	Duffy Duck	duffy@example.com	1152	2022-02-07		€0,00
<input type="checkbox"/>	[REDACTED]			1150	2021-12-21		0,00 €
<input type="checkbox"/>	[REDACTED]			1149	2021-12-21	2021-12-22	0.00 CHF

Creating an invoice

Now that a client was created, we can create an invoice. To create a new invoice, click on “Invoices” in the navigation, then click on the blue “New Invoice” button.



Select the client you want to create the invoice for. In our case this is the ACME Inc company we just created before. Once you select the client, all the client contacts are shown. You may select or de-select certain contacts for this invoice.



The screenshot shows the "Invoices / Create" page. The "Client" field is set to "ACME, Inc" with an "x" icon to clear it. Below the client name are links for "Edit Client" and "View Client". There are two checked checkboxes for contacts: "Duffy Duck" (duffy@example.com) and "Bugs Bunny" (bugs@example.com). The "Invoice Date" is set to "2022-02-07" and the "Due Date" is set to "2022-02-14". The "Partial/Deposit" field is empty. A small "R" icon is visible in the bottom right corner.



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The “create invoice form” is split into three different parts:

- **Top: Contains meta information of the invoice**, such as invoice number, invoice date, due date, discount and any custom fields for invoices.
- **Products: The “content” of the invoice**, which will show the items for goods or services, their quantity and rate or product price.
- **Notes and terms: Additional notes and terms** which can be added to the invoice. You may also upload additional files under the “Documents” tab.

Now we enter the products we have sold this client:

Item field: Can be any input, usually a product number or simply an item counter. If you have already created product items (under “Products”), the product description will automatically be loaded into the Description field. This depends on the “Auto-fill products” setting (Settings -> Products).

Description field: Can be any input, usually describes the ordered product or service.

Unit Cost: The price for a single product, or rate for services invoiced by the hour.

Quantity: The number of products or number of hours of service.

Item	Description	Unit Cost	Quantity	Line Total
1	Installation Invoice Ninja	150.00	1	€150,00
2	Writing Documentation	150.00	8	€1.200,00
3	Whitelabel License	30.00	1	€30,00

Public Notes	Private Notes	Terms	Footer	Documents
Thank you for choosing a dedicated Invoice Ninja server from Infiniroot!				

Subtotal	€1.380,00
Tax	VAT / TVA / MwSt 7.7% ▼ €106,26
Round	-0.01
Total incl. Taxes	€1.486,25

Invoice Ninja automatically calculates the sum of all products and applies the Tax Rate, if selected.

Note: The “Round” field is a [custom field](#) under “Settings -> Invoice Settings -> Custom Fields -> Invoices Tab -> Invoice Surcharge.



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Below the invoice form, the integrated preview window shows how the invoice will look.

The screenshot shows the Invoice Ninja interface with a preview window. At the top, there are buttons for "Save Draft", "Mark Sent", and "Email Invoice". The preview window displays the invoice details for Infiniroot GmbH, including the invoice number (27.01.02.22), date (February 7, 2022), and total amount (€1,486.25). The invoice items are listed in a table:

Description	Unit Cost	Quantity	Line Total	
Installation Invoice Ninja	€150,00	1	€150,00	
Writing Documentation	€150,00	8	€1.200,00	
Whitelabel License	€30,00	1	€30,00	
Thank you for choosing a dedicated Invoice Ninja server from Infiniroot!			Subtotal	€1.380,00
			VAT / TVA / MwSt 7.7%	€106,26
			Round	€-0,01
			Total incl. Taxes	€1.486,25

After finishing and saving the invoice (“Save Draft”) you can send the invoice to the client by clicking on the “Email Invoice” button.

This sends an e-mail to all selected contacts of the client containing a link to the “Customer Portal” of Invoice Ninja, where every contact is able to view current and past invoices.

Note: If you prefer to send the invoice physically by post, you can print the invoice, send the invoice in a letter to the client and then use the “Mark Sent” button.

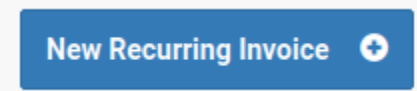


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Creating a recurring invoice

One of the features Invoice Ninja is known for, is the possibility to create recurring invoices. A recurring invoice is an invoice, which automatically is re-created in a specific interval (for example annually).

To create a new recurring invoice, click on “Recurring” in the navigation, then click on the blue “New Recurring Invoice” button.



You will find the familiar “new invoice form” from above. The biggest difference in the form is the “Frequency” field, which determines the invoice interval:

Recurring Invoices / Create

Client	ACME, Inc <input type="text"/>	Frequency	Monthly <input type="text"/>	Auto Bill	Off <input type="text"/>
	<input type="button" value="x"/> Edit Client View Client	Start Date	March 1, 2022 <input type="text"/>	PO #	<input type="text"/>
	<input checked="" type="checkbox"/> Duffy Duck duffy@example.com	End Date	<input type="text"/>	Discount	<input type="text"/> <input type="text"/> Percent <input type="text"/>
	<input checked="" type="checkbox"/> Bugs Bunny bugs@example.com	Due Date	Use client terms <input type="text"/>		

Another difference is that the “Invoice Date” is changed to “Start Date” in this form. This allows you to set a date in the future when the invoice should be created automatically.

Once you click on the green “Mark Ready” button, the recurring invoice will be saved and activated:

Are you sure you want this invoice emailed?

Duffy Duck <duffy@example.com>

Bugs Bunny <bugs@example.com>

Note: the email will be sent on March 1, 2022.



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Enter a payment

Now that you have sent your first invoices to your clients, the invoices need to be paid.

If your payment method is online payment (by using a Payment Gateway in the Settings), Invoice Ninja automatically marks the invoice as paid.

If your clients are using bank/wire transfers for paying invoices, you need to enter a payment manually. Once you see in your bank account that a client has paid an invoice, click on "Payments" in the navigation. In the form you can select the client followed by the invoice of this client and the amount received:

Client	ACME, Inc	x
Invoice	27.01.02.22 - Draft - ACME, Inc - €1.486,25 €1.486,25	x
Amount	1486.25	EUR
Payment Type	Bank Transfer	x
Payment Date	February 7, 2022	📅
Transaction Reference		
Private Notes		
	<input type="checkbox"/> Convert currency	
	<input type="checkbox"/> Email payment receipt to the client	

Cancel Save



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Another method to enter a payment is to list the invoices (“Invoices” in the navigation), hover over an invoice line, then click on the appearing “Select” drop down menu and click on “Enter Payment”.

Invoices

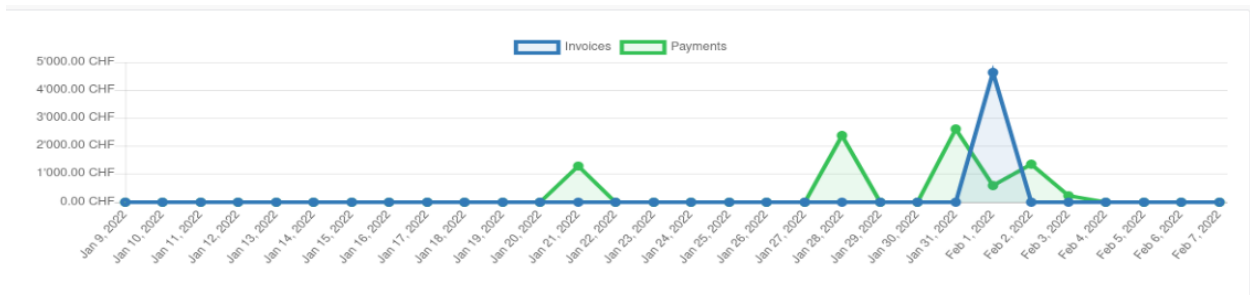
Archive (1) Filter [New Invoice](#)

	Invoice Number	Client Name	Date	Amount	Balance	Due Date	Status	
<input checked="" type="checkbox"/>	27.01.02.22	ACME, Inc	February 7, 2022	€1.486,25	€1.486,25	February 14, 2022	Draft	Select
<input type="checkbox"/>	R027.01.02.22					March 3, 2022	Paid	Clone To Invoice Clone To Quote Invoice History Delivery Note
<input type="checkbox"/>	009.39.02.22					March 3, 2022	Paid	Mark Sent Mark Paid Enter Payment
<input type="checkbox"/>	002.96.02.22					March 3, 2022	Paid	Archive Invoice Delete Invoice
<input type="checkbox"/>	R017.09.02.22					March 3, 2022	Paid	
<input type="checkbox"/>	R001.105.02.22					March 3, 2022	Paid	

Note: An invoice can also just be marked as paid (“Mark Paid”) but you cannot add additional information such as transaction reference or other notes to the payment.

You can see an overview of all payments when you click on “Payments” in the navigation.

You will also notice that the “Dashboard” now contains blue and green graphs. Blue standing for the amount of the sent invoices, green for the amount of paid invoices.



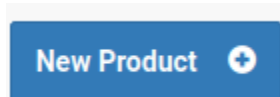


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Using Products

If you are selling goods or recurring services, you can create products and use them in the invoices. This helps you to create invoices faster as you don't need to type the product description anymore.

To create a product, click on "Products" in the navigation, then on the blue "New Product" button.



Enter a unique product identifier (here AM123) and a product description (Notes). If this is a product, enter the price of a single piece. If this is a service you offer at a daily or hourly rate, enter the rate.

The image shows a form for creating a new product. It has three input fields: 'Product' with the value 'AM123', 'Notes' with the value 'Engineering tasks for Invoice Ninja', and 'Cost' with the value '150.00'. At the bottom, there are two buttons: 'Cancel' (grey) and 'Save' (green).

Then click on Save.

The "AM123" product now appears in the list of products and can now be used when you create a new invoice.

Create a new invoice, select a client and in the product section of the invoice, simply enter the product identifier from your product.



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With a click on the product, you can see that the invoice's product description and unit cost fields are automatically filled:

Client	ACME, Inc ✕	Invoice Date	February 7, 2022 📅	Invoice #	27.02.02.22
	Edit Client View Client	Due Date	Feb 14, 2022 📅	PO #	
	<input checked="" type="checkbox"/> Duffy Duck duffy@example.com	Partial/Deposit		Discount	<input type="text"/> <input type="text"/> Percent ▾
	<input checked="" type="checkbox"/> Bugs Bunny bugs@example.com	Title			

Item	Description	Unit Cost	Quantity	Line Total
AM123	Engineering tasks for Invoice Ninja	150	1	€150,00

You just need to verify or set the Quantity field in this case - and you're all set.

Hint: Instead of manually creating products one by one, you can also import a list of products by using different input possibilities (for example CSV), containing all the relevant information. To import products, click on "Settings" in the navigation, then click on "Import | Export".



Getting started with Invoice Ninja v4

Creating a quote

Sometimes you might need a customer to accept your services prior to starting your work. This is what a quote is about. It is basically a contract, describing the goods or services and their prices, the customer needs to approve.

In Invoice Ninja, creating a quote is just like creating an Invoice. The input form looks the same:

Quotes / Create

Client: ACME, Inc ✕
Edit Client | View Client
✓ Duffy Duck
duffy@example.com
✓ Bugs Bunny
bugs@example.com

Quote Date: February 7, 2022 📅
Valid Until: 📅
Partial/Deposit:
Title:

Quote #: 27.01
PO #:
Discount: Percent ▾

Item	Description	Unit Cost	Quantity	Line Total
AM123	Engineering tasks for Invoice Ninja	150	2	€300,00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Public Notes | Private Notes | Terms | Footer | Documents

Subtotal: €300,00
Tax: VAT / TVA / MwSt 7.7% ▾ €23,10
Round:
Total: €323,10

Just create the quote the same way you would create an invoice. You might add contract specific terms to the quote or add documents which further describe the nature of the quote.

After saving and sending the quote to the client (“Email Quote”), the client can view and accept the quote directly in the customer portal:



Getting started with Invoice Ninja v4

DASHBOARD RECHNUNGEN ZAHLUNGEN

Downloaden **Zustimmen**

Dokumente:
• General Service Agreement v1.4.pdf (40.9 kB)

1 of 1 Automatic Zoom

root
INFINIROOT

Infiniroot GmbH
Im Loo 9
9553 Bettwiesen
Schweiz

CHE-360.322.733
<https://www.infiniroot.com>
invoicing@infiniroot.com

ANGEBOT

Angebotsnummer	27.01	ACME, Inc
Angebotsdatum	February 7, 2022	Fake Tunnel Street
Gesamt	€323,10	Toon Town 99999 Färöer-Inseln

Beschreibung	Einzelpreis	Menge	Summe
Engineering tasks for Invoice Ninja	€150,00	2	€300,00

By clicking on the green “Approve” button, an optional setting (Settings -> Client Portal -> Authorization -> Signature tab) allows the customer to sign the quote:

Genehmigung

By accepting the quote, the General Service Agreement (attached to this quote) is also accepted.
Quote is based on estimated effort. Additional work exceeding the estimation is additionally invoiced with the same rate. An information is given in advance if applicable.

Bitte unterschreiben Sie hier:

Zustimmen

Note: The customer can see the customer portal and quote in the language defined in the client settings. In this example, the client “ACME, Inc” was created with German language.



Getting started with Invoice Ninja v4

Once the quote was approved by the client, it can be converted into an invoice. Use the “More Actions” drop down menu and click on “Convert to Invoice”:

Item	Description	Unit Cost	Quantity	Line Total
AM123	Engineering tasks for Invoice Ninja	150.00	2	€300,00

Public Notes	Private Notes	Terms	Footer	Documents
<div style="border: 1px solid #ccc; height: 50px;"></div>				

Subtotal	€300,00
Tax	VAT / TVA / MwSt 7.7% €23,10
Clone To Invoice	
Clone To Quote	
View History	0.00
Convert to Invoice	€323,10
Archive Quote	
Delete Quote	

Custom2 [Download](#) [Save Draft](#) [Mark Sent](#) [Email Quote](#) [More Actions](#)

Hint: It is also possible to automatically convert an approved quote into an invoice. This can be activated in the “Settings” -> Invoice Settings -> Workflow Settings -> Quote Workflow -> Auto Convert.