Getting Started with InvoiceNinja

Presented by Infiniroot
Guide version 1.1 / March 2022
This guide covers Invoice Ninja v4.

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.

What are the costs for Invoice Ninja?

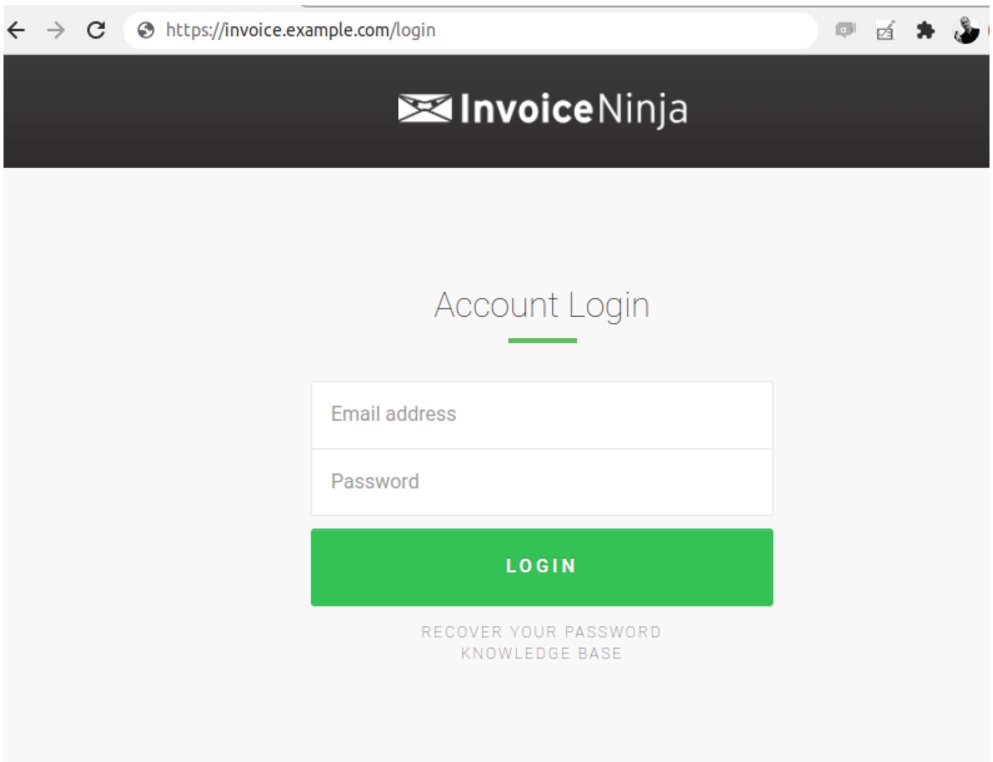
Invoice Ninja is a so-called Open Source application. The code itself is free. However infrastructure (server) costs are invoiced by the hosting provider. There is also a so-called "Whitelabel" license fee. This license removes the Invoice Ninja logo from the created invoices - your invoices look more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

Account Login

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

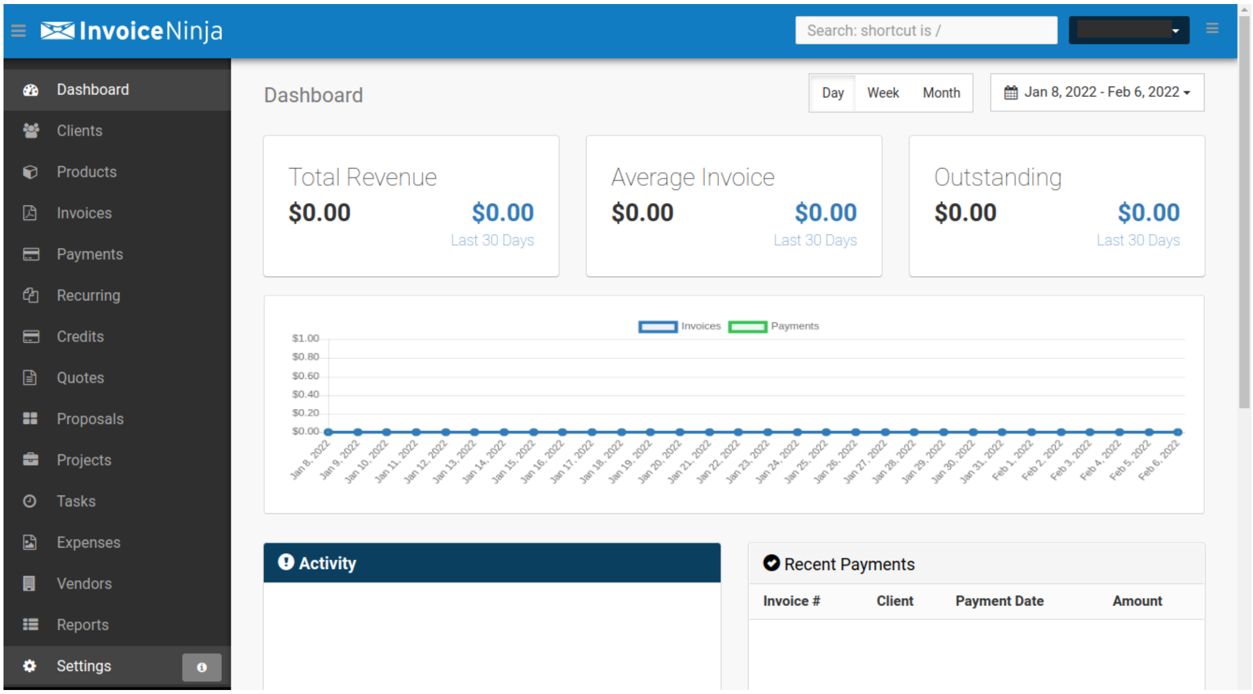


Enter the email address and the password. These access credentials are part of the e-mail, once your server is ready.

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).

Getting started with Invoice Ninja v4



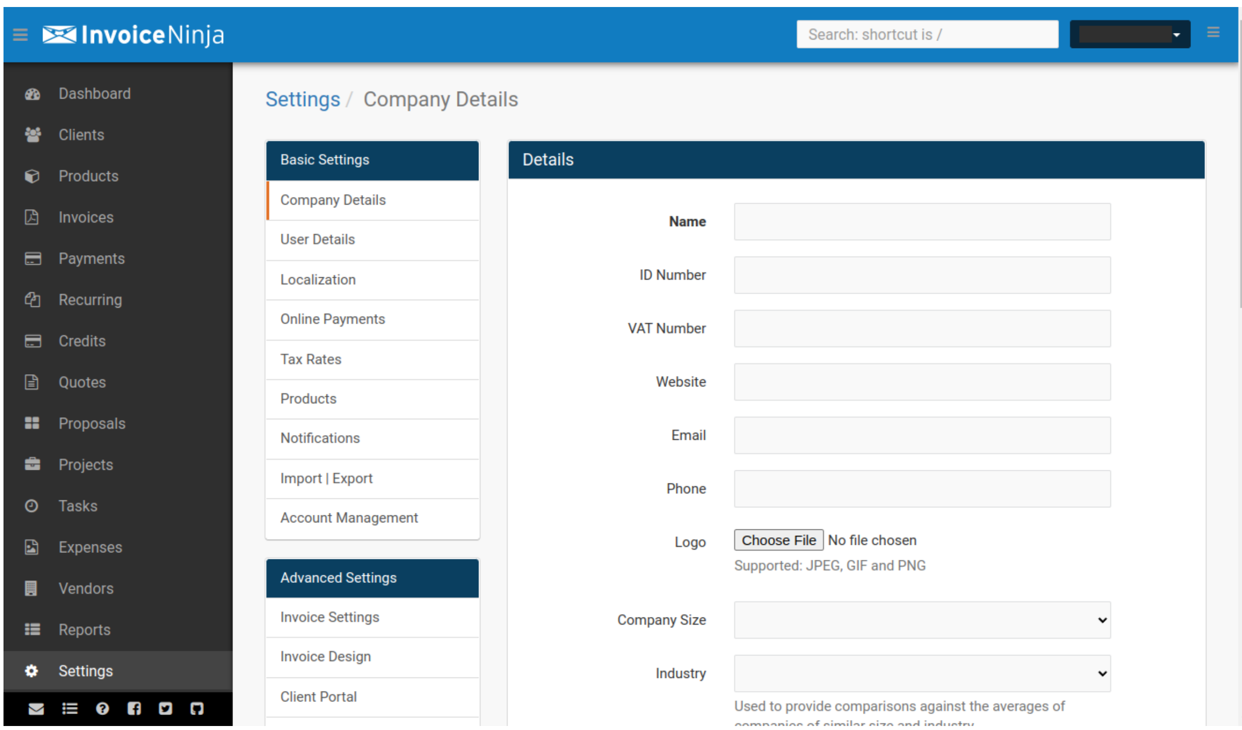
On the left side you see the “navigation”, in which you can change into a certain section.

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:

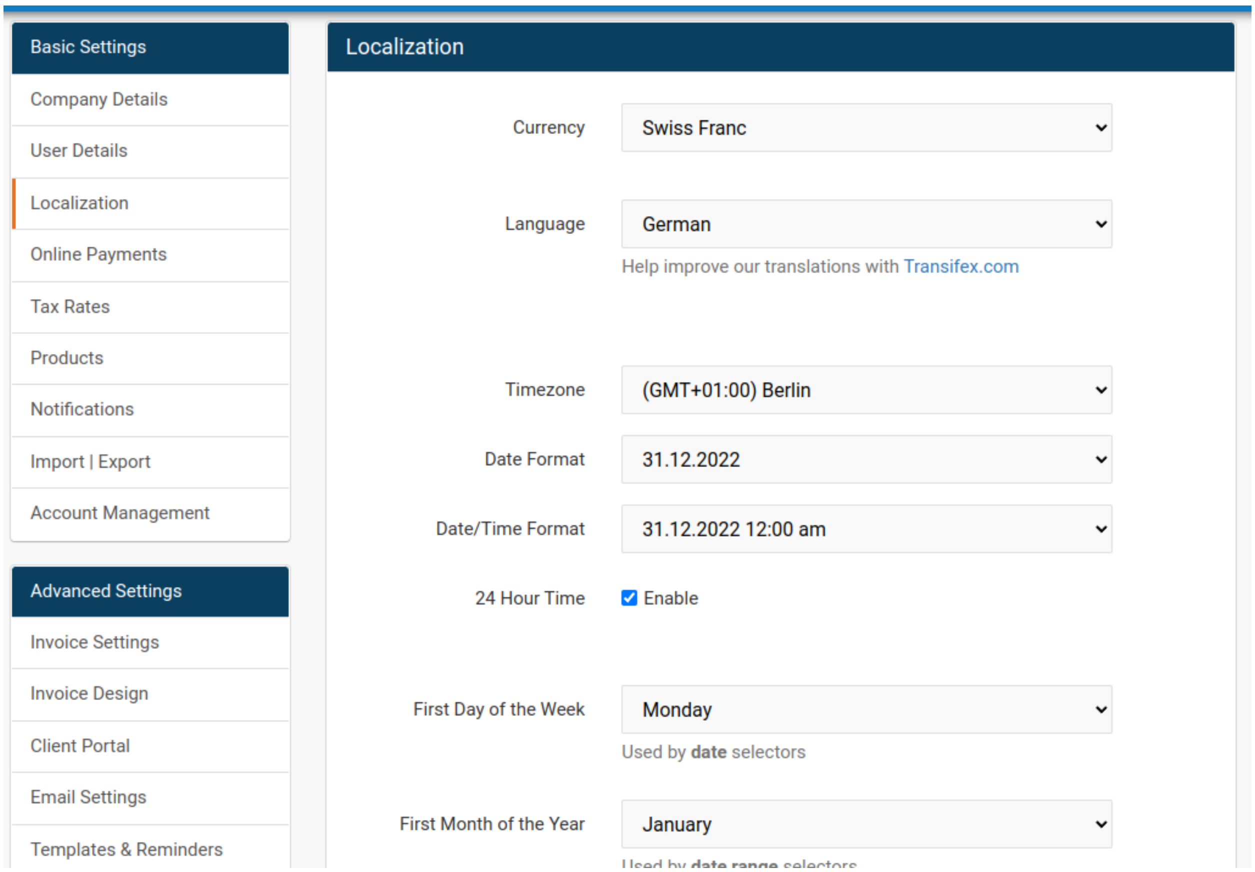
Payment Type: The way you prefer your invoices to be paid. If you don’t intend to use online payments (such as Credit Cards or Online Payment Services such as Google Pay or Apple Pay), select Bank Transfer.

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

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:

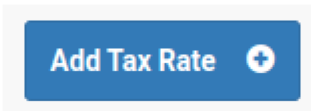


Note: If you set the language of Invoice Ninja to a different language than English, the translation for the name of the months might not appear correctly in the final invoices. As a workaround, we suggest to use “Date Format” and “Date/Time Format” to use the number of month (12), instead of the name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

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.

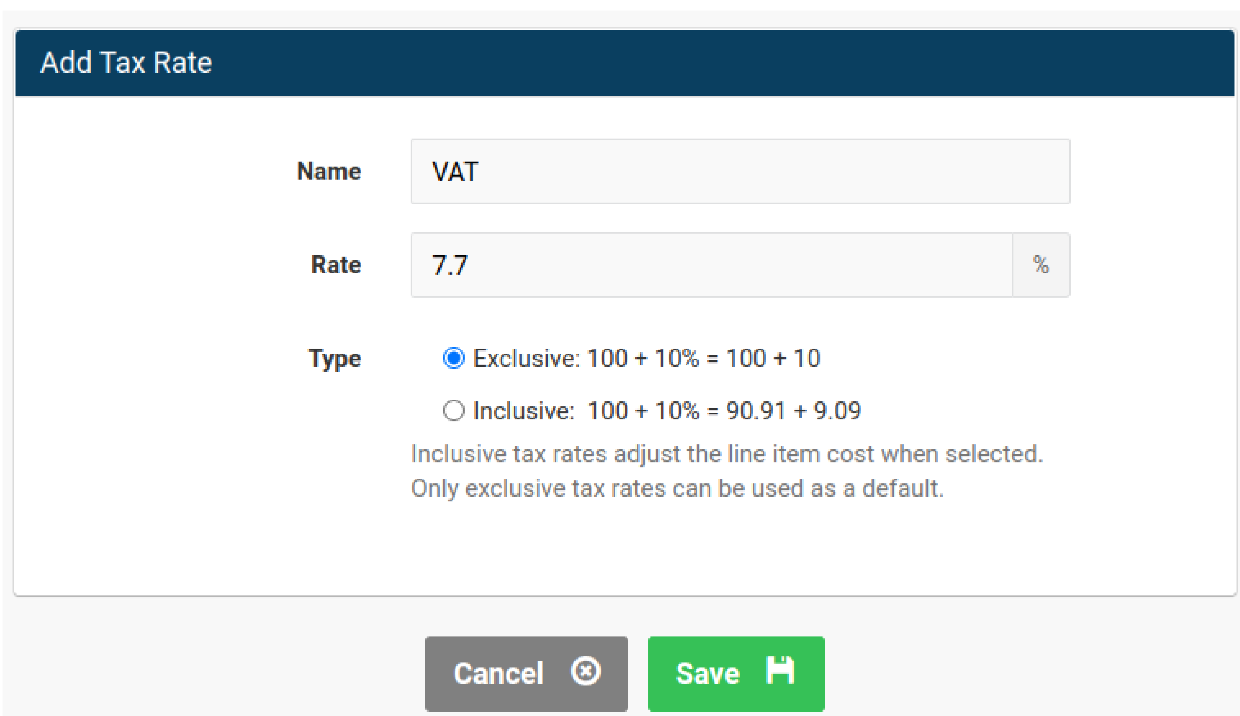
In the navigation, click on “Settings”, then on “Tax Rates”. Then click on the blue “Add Tax Rate” button.



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.

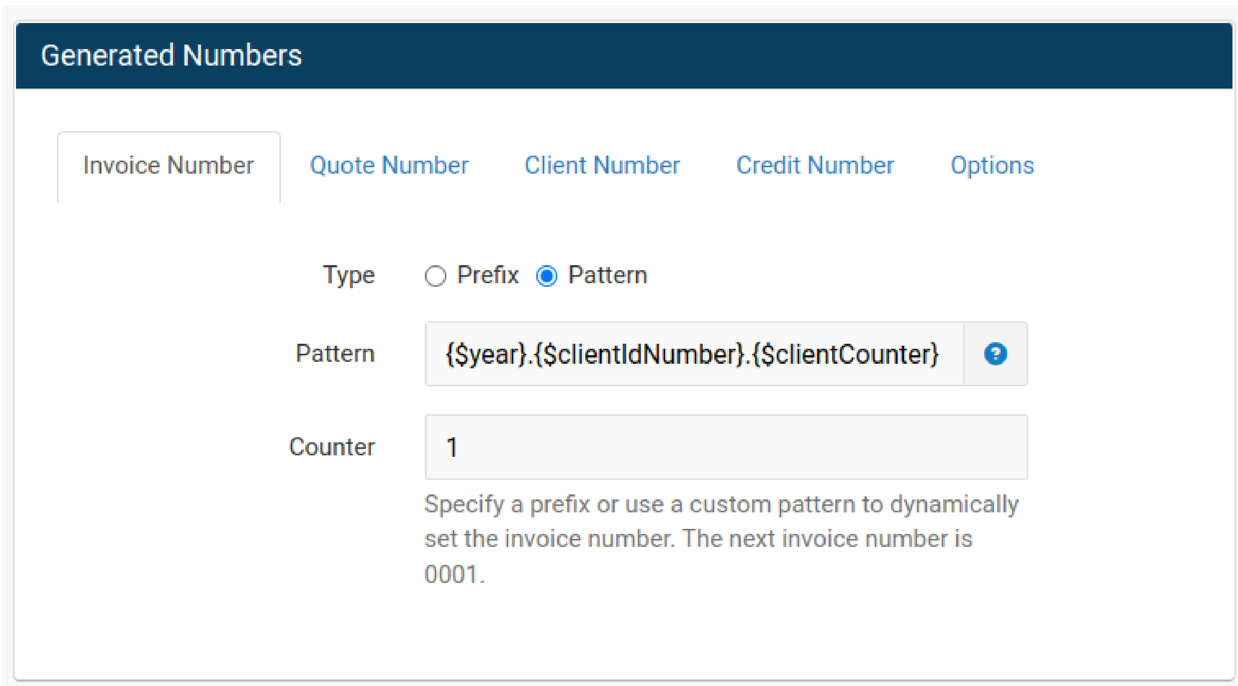


Advanced Settings: Invoice Numbering/Counter

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, the 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.

Advanced Settings: Custom Fields

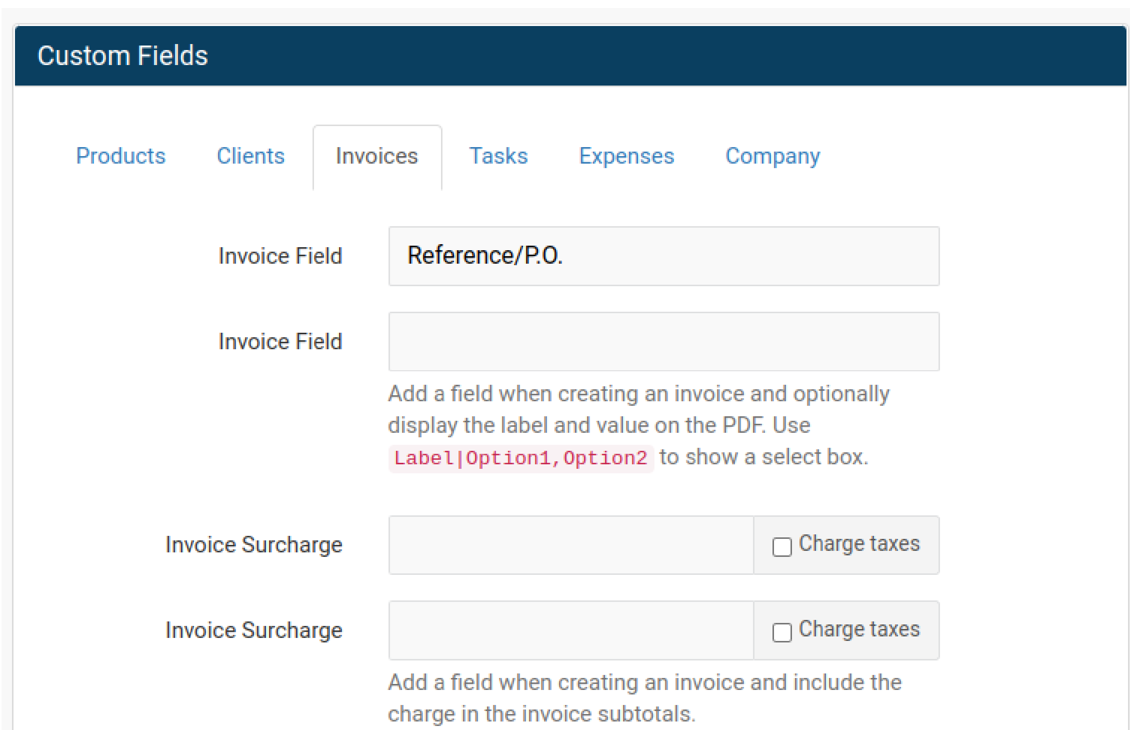
Invoice Ninja allows to create two custom fields in different categories:

- 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:



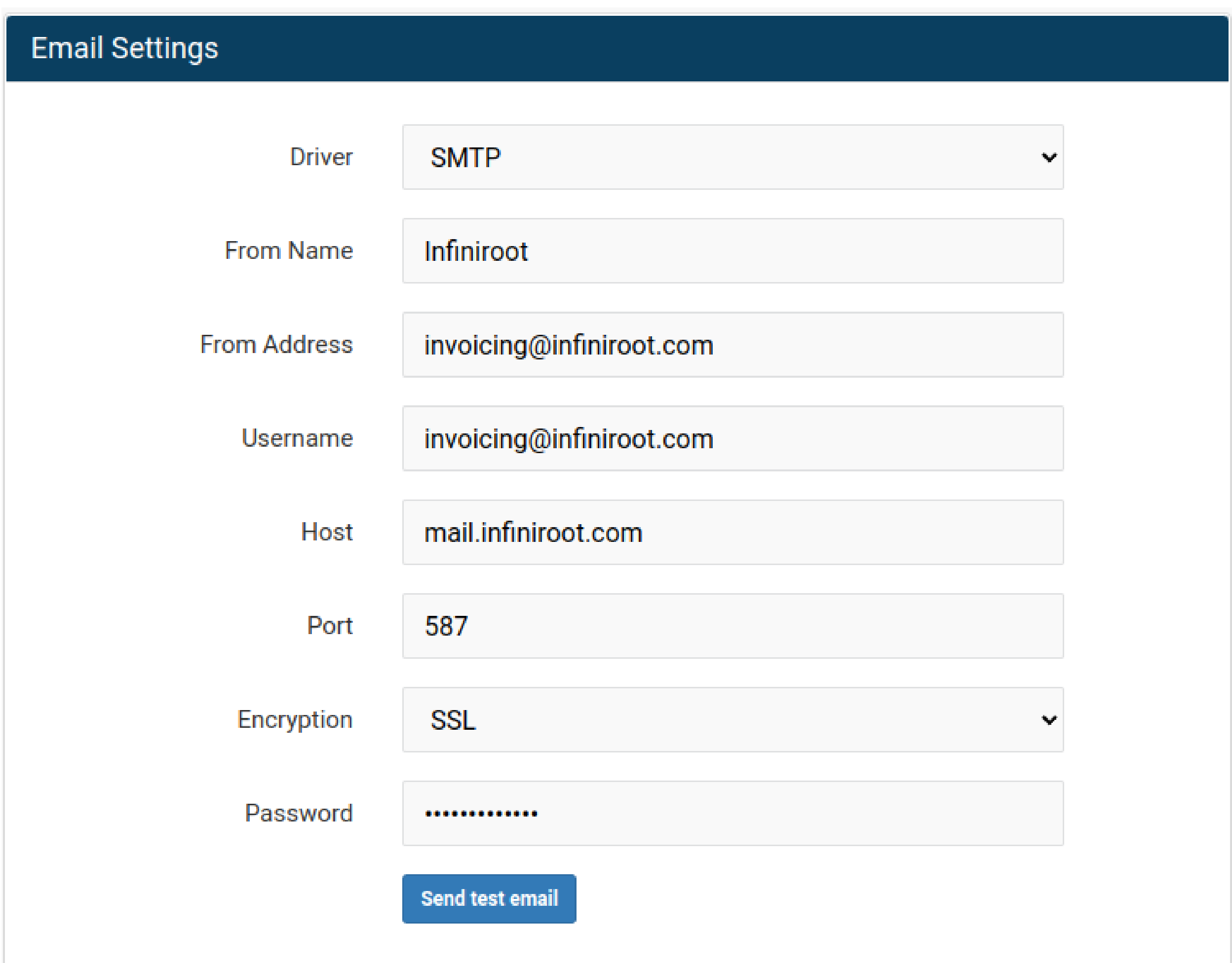
After saving this page, the custom field “Reference/P.O.” can then be selected to be shown in the Invoice Design under [Invoice Fields](#)..

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”.

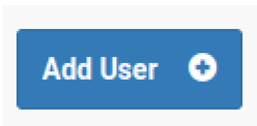
The default is to use the “Mail” driver, which sends e-mails from the Invoice Ninja server. By changing to the “SMTP” driver, a mail account can be added. Use your existing mail account credentials - you should get this information from your mail provider.



Advanced Settings: Additional Users

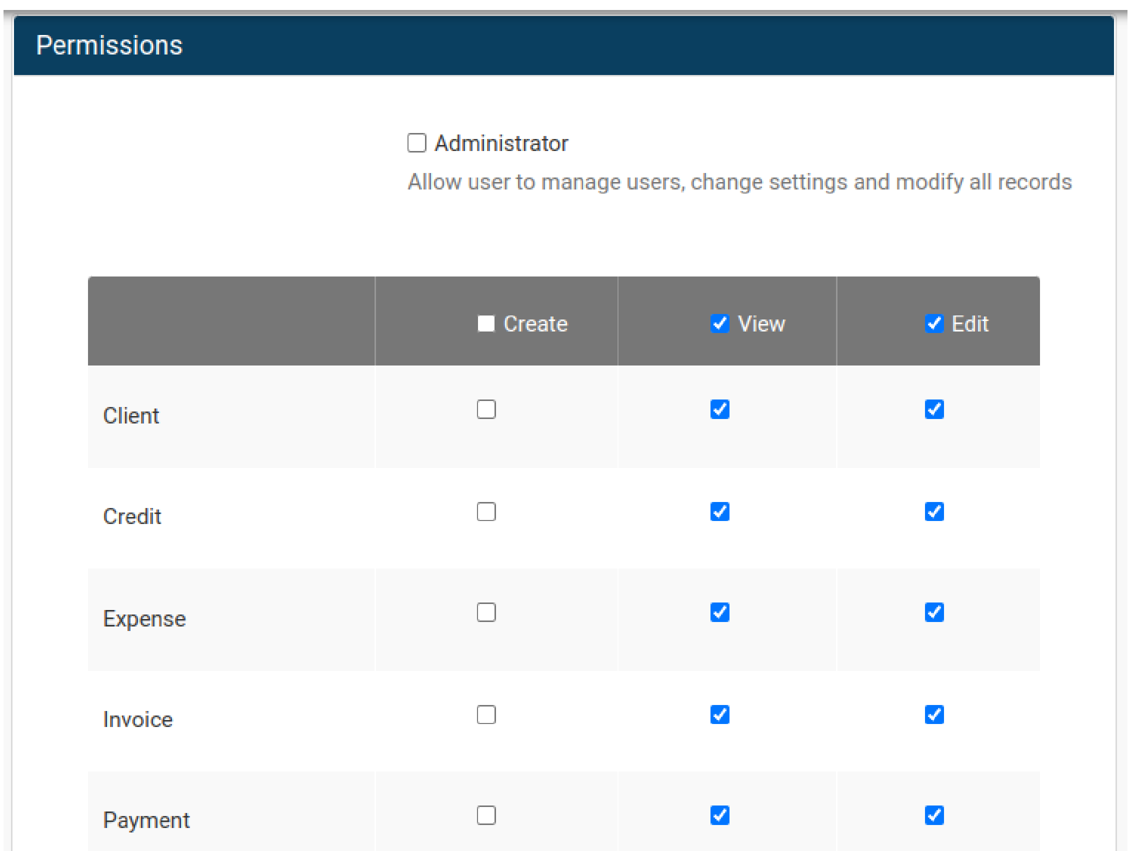
If your company has a decent size, you might have multiple employees working for you and handling invoices. For this purpose multiple users can be created.

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.

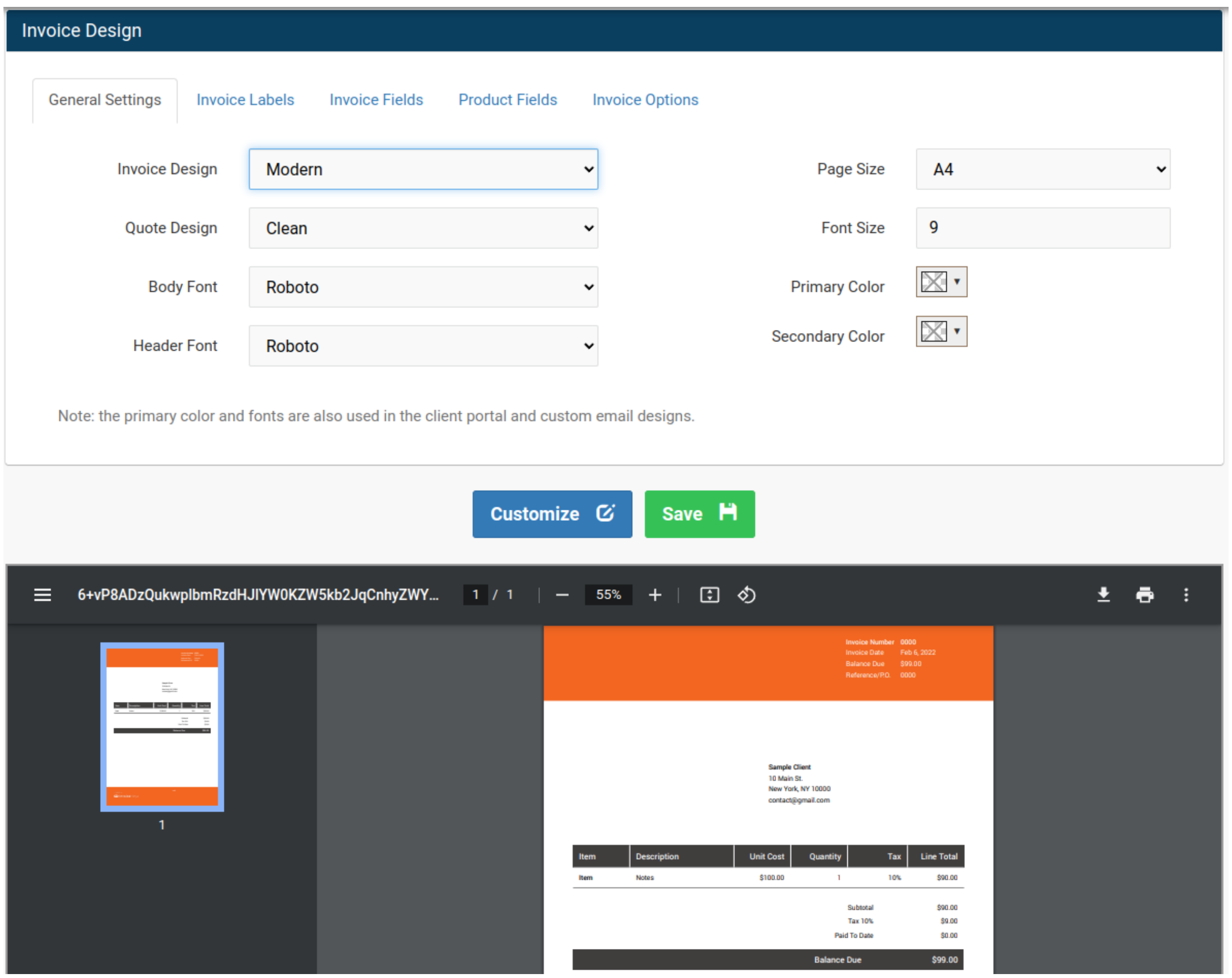


Invoice Design

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.

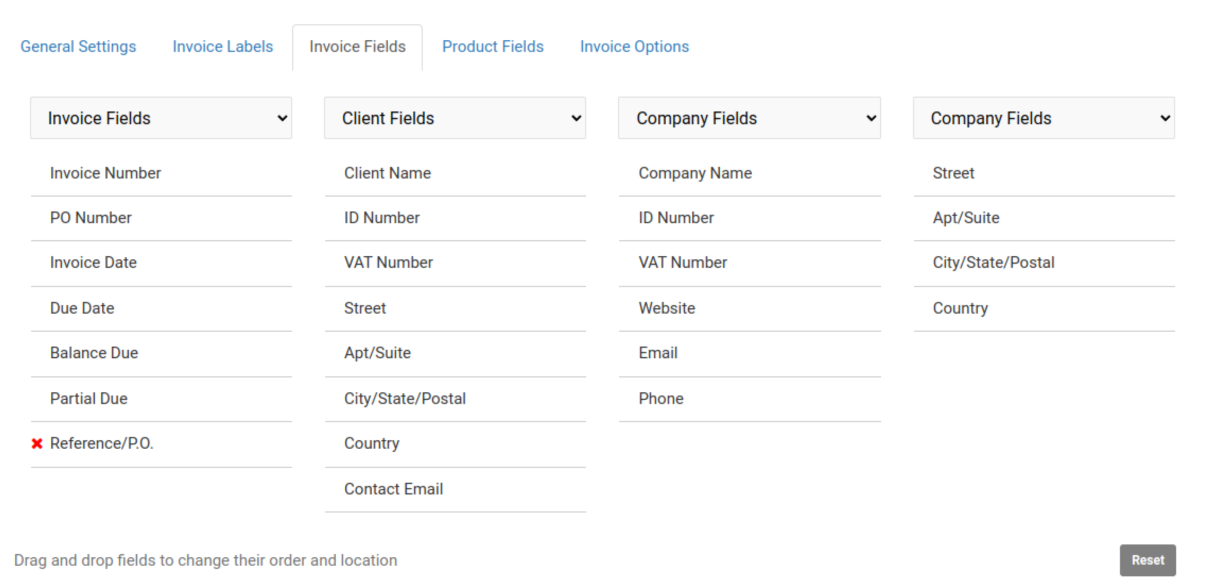


Note: Very advanced users can adjust the designs in detail, using the blue “Customize” button. However this requires in-depth knowledge of the pdfmake syntax and can be quite complex.

Invoice Fields

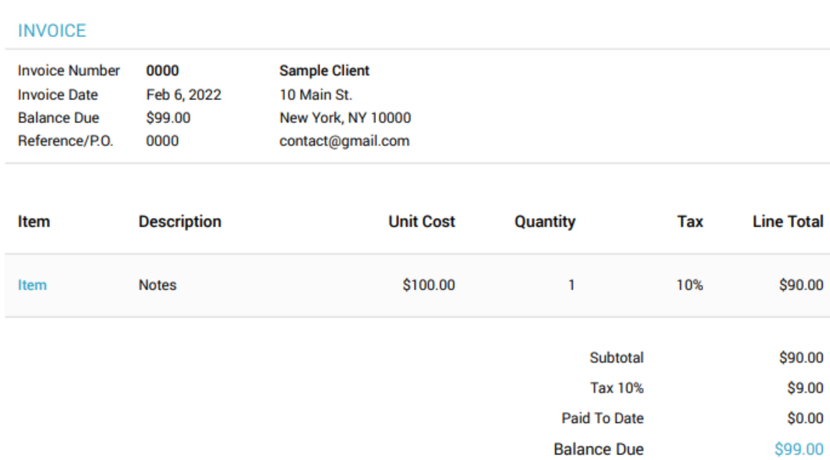
To change what kind of information should appear in an invoice, click on “Settings” in the navigation, then click on “Invoice Design” and select the tab “Invoice Fields”.

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



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:

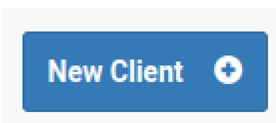


Working with Invoice Ninja

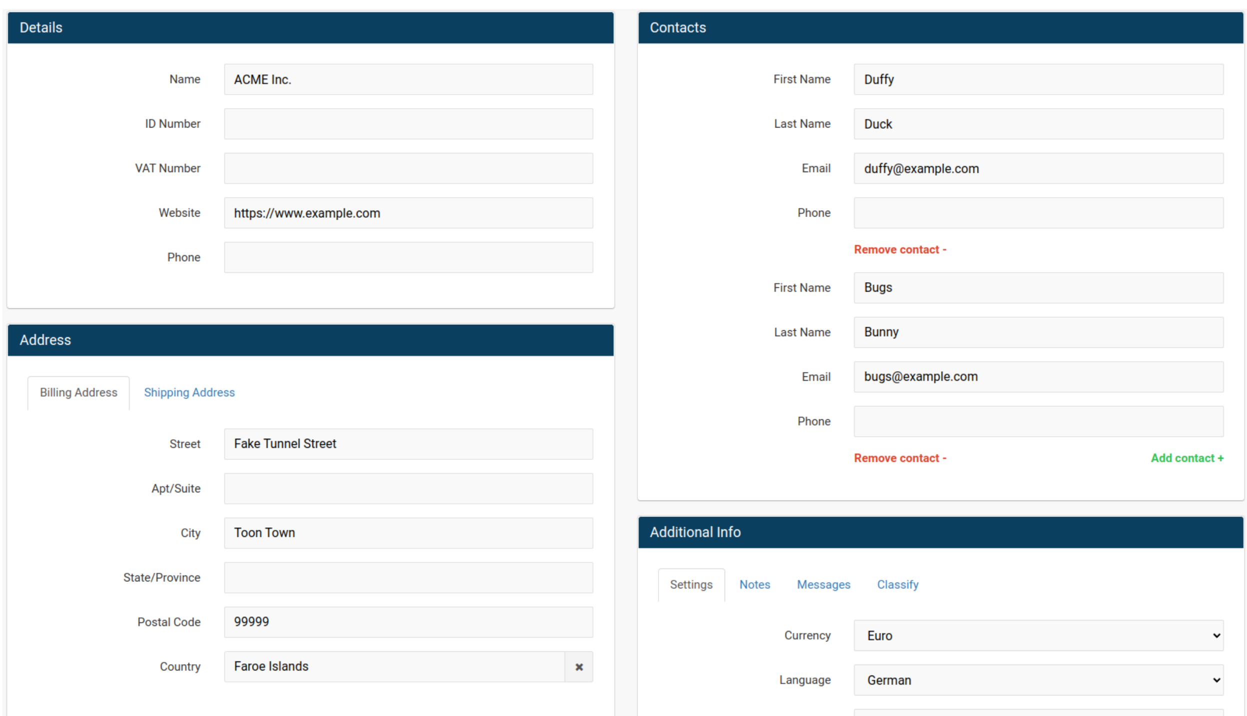
Now let's start to use Invoice Ninja, shall we?

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:

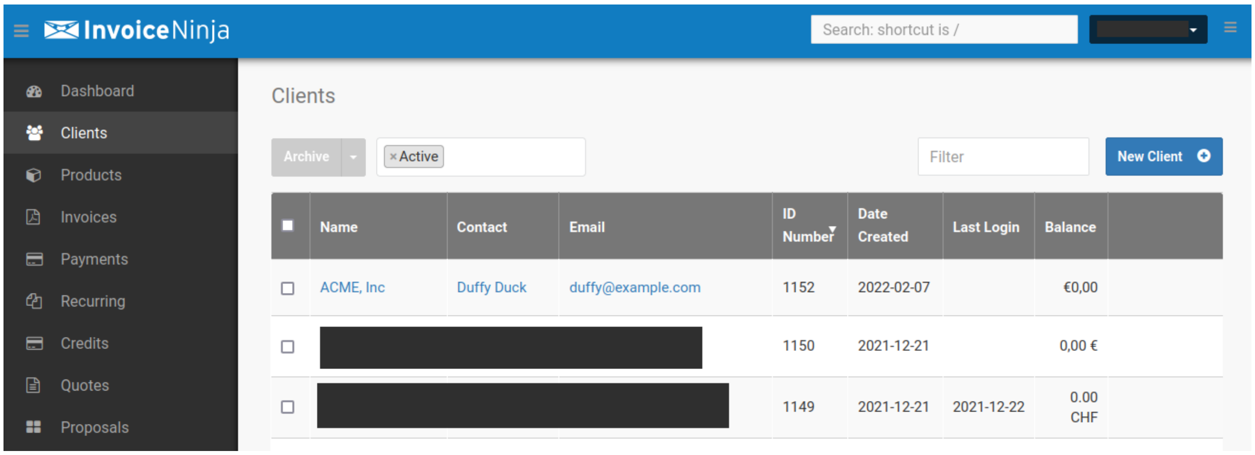


A lot of information can now be added when creating a client. As a client can be a small or a large company, you may have multiple contacts of the same company. They can all be added as contacts. You can also overwrite the Invoice Ninja default settings by using a different currency or payment terms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



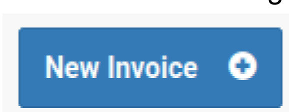
The Client ID (ID Number) can be set manually or if left blank, Invoice Ninja will create a new ID by using a counter (see Invoice Numbering).

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

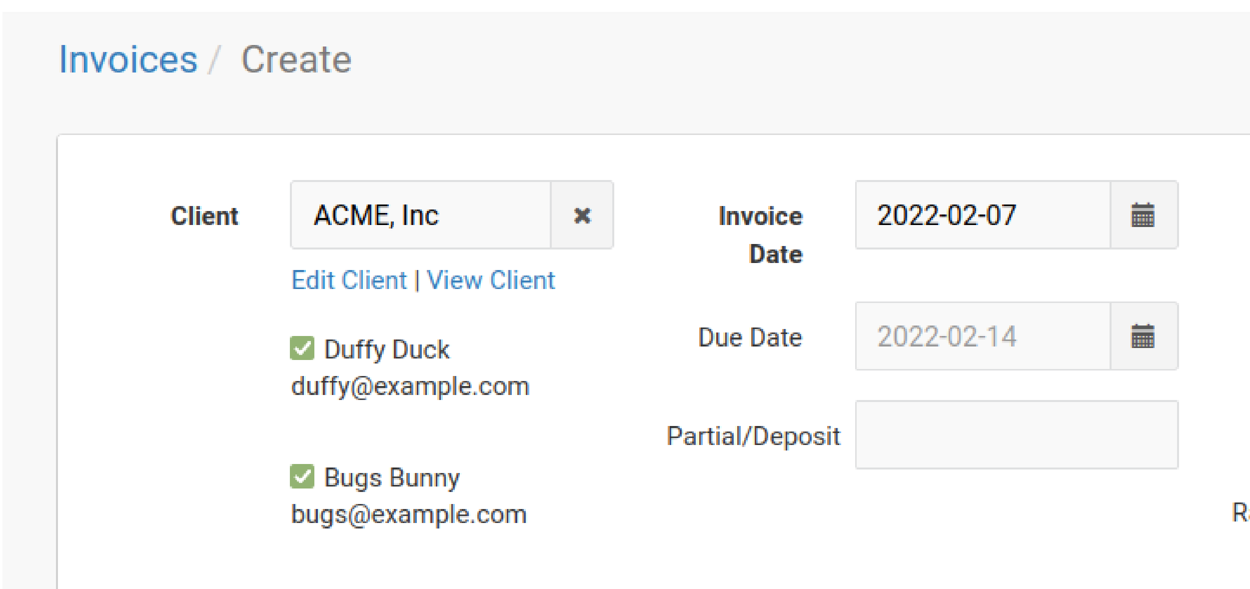


Creating an invoice

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.

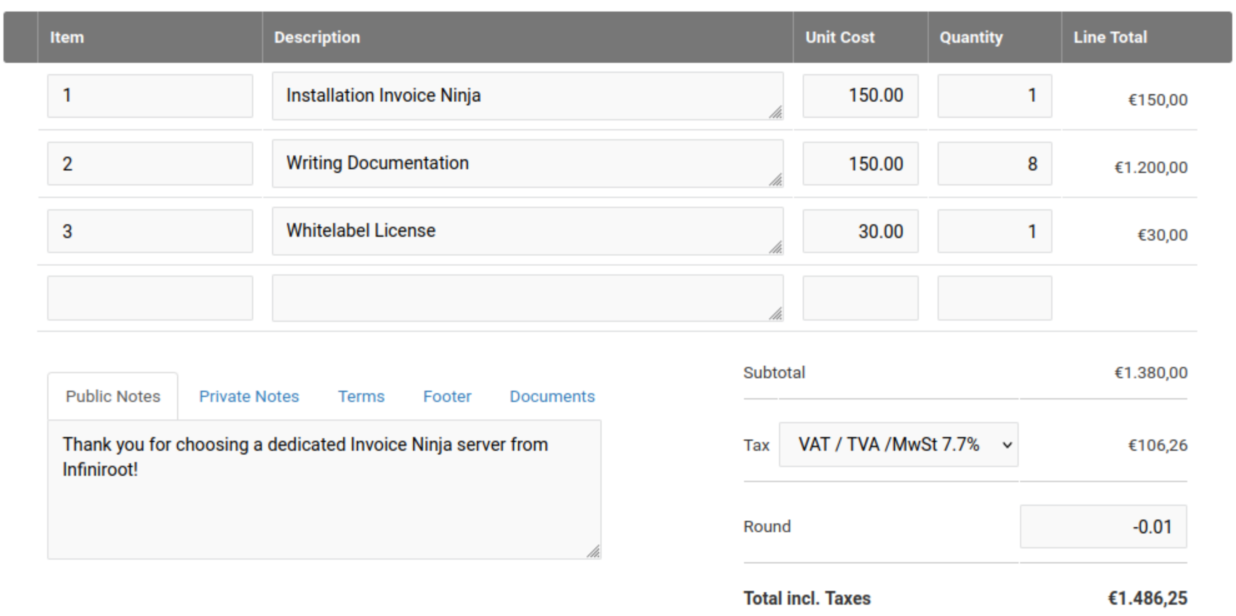


The “create invoice form” is split into three different parts:

- **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:

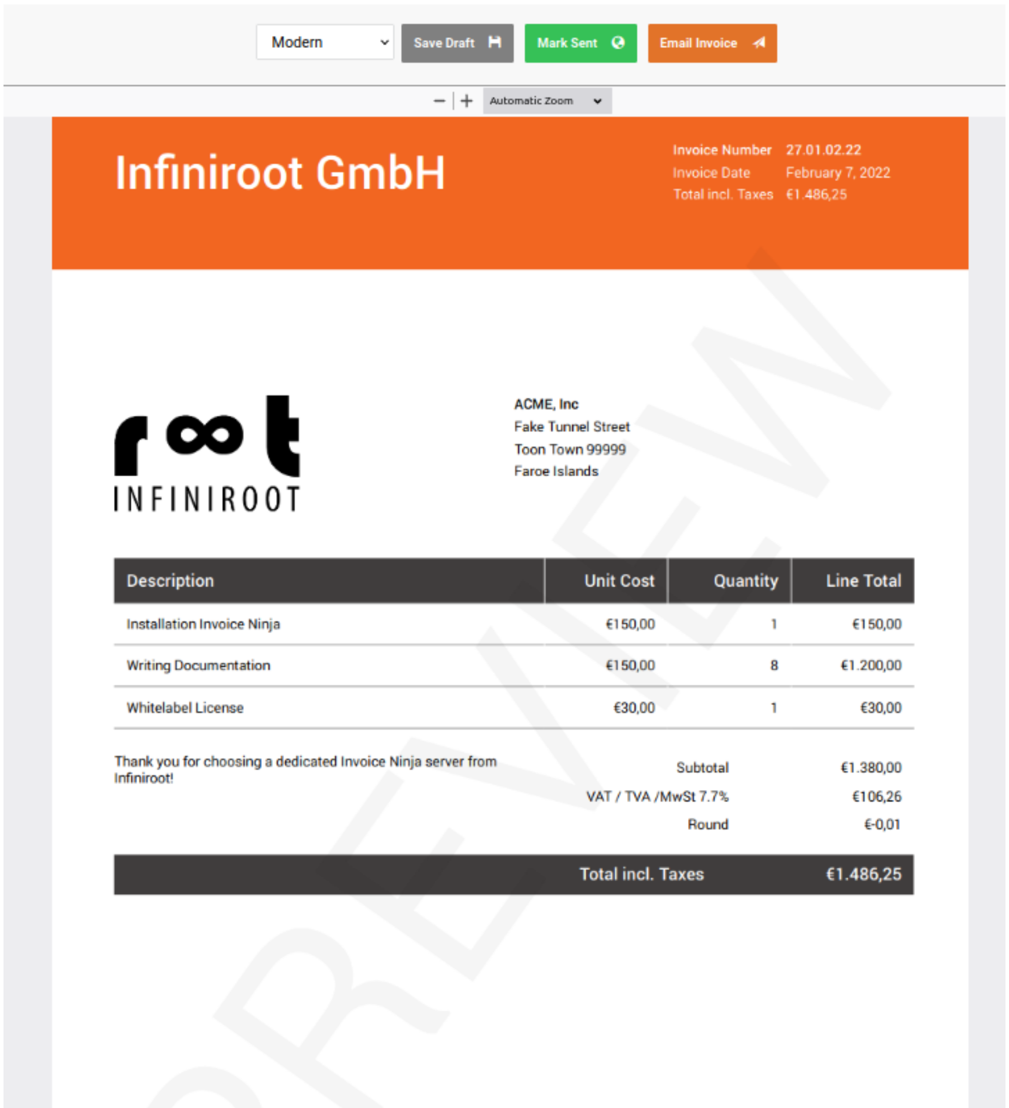
Item field: Can be any input, usually a product number of simply an item counter. If you have already created product items (under “Products”), the product description will automatically be loaded into the Description field. This depends on the “Auto-fill products” setting (Settings -> Products).
Description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



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.

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



Infiniroot GmbH

Invoice Number 27.01.02.22
Invoice Date February 7, 2022
Total incl. Taxes €1.486,25

INFINIROOT

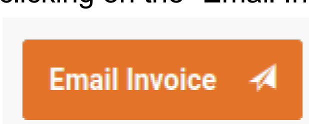
ACME, Inc
Fake Tunnel Street
Toon Town 99999
Faroe Islands

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.



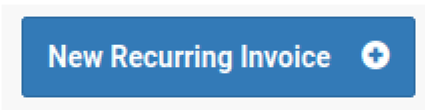
This sends an e-mail to all selected contacts of the client containing a link to the "Customer Portal" of Invoice Ninja, where every contact is able to view current and past invoices.

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.

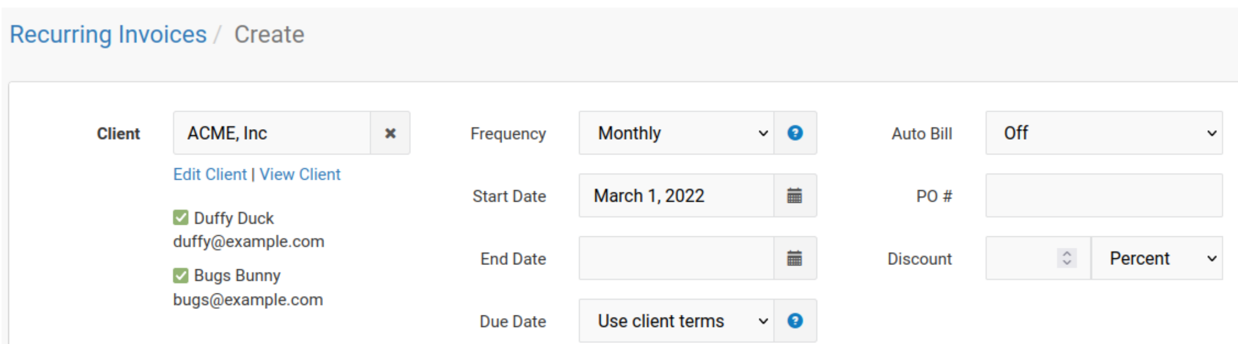
Creating a recurring invoice

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.

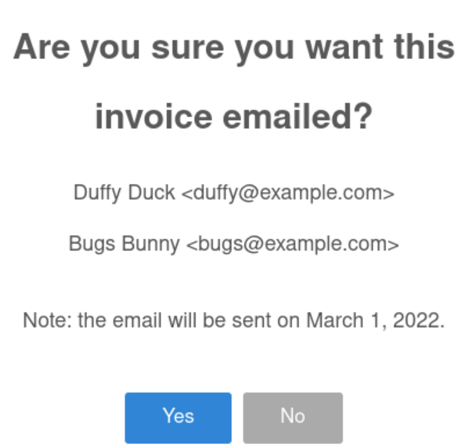


You will find the familiar “new invoice form” from above. The biggest difference in the form is the “Frequency” field, which determines the invoice interval:



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:

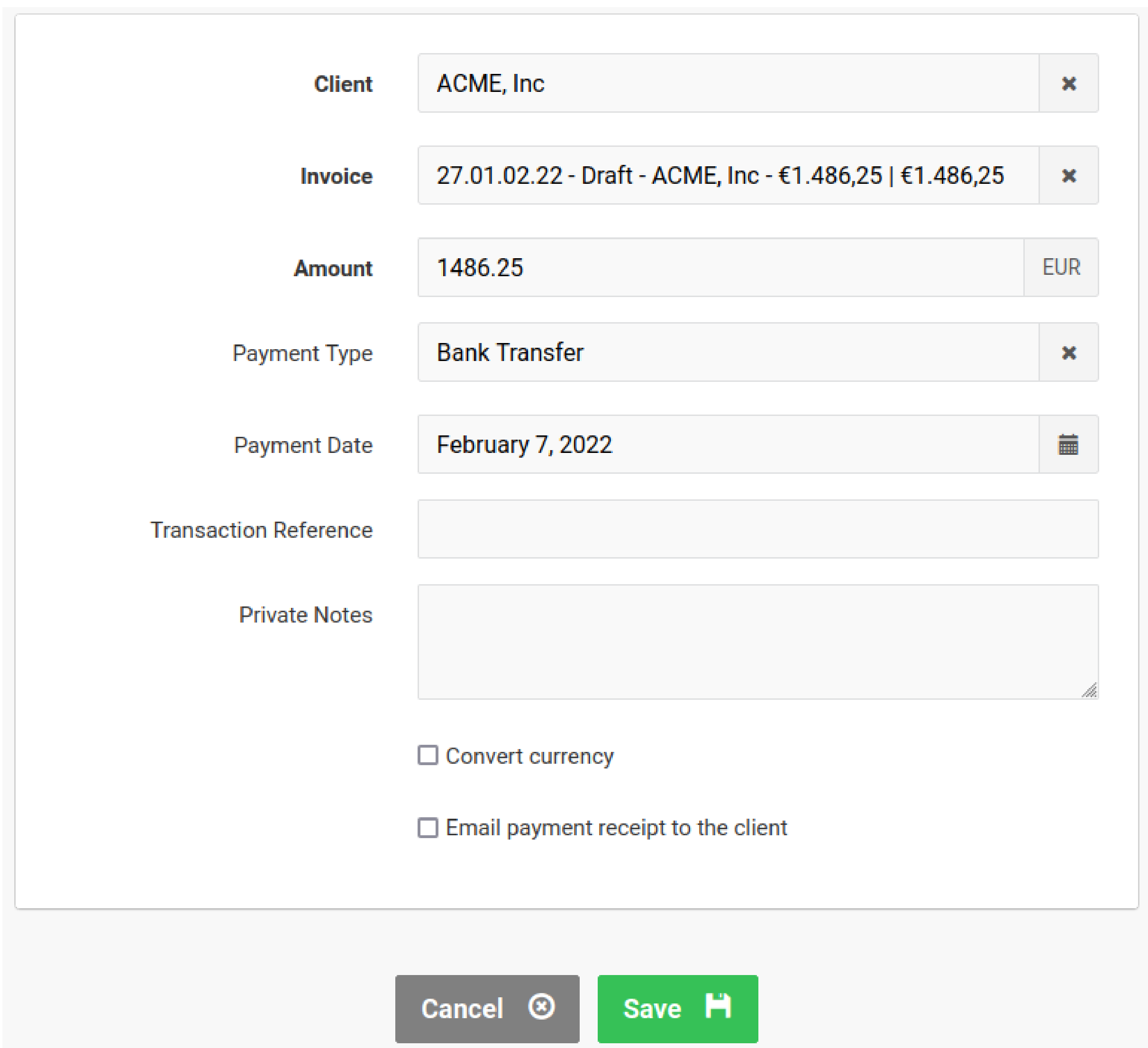


Enter a payment

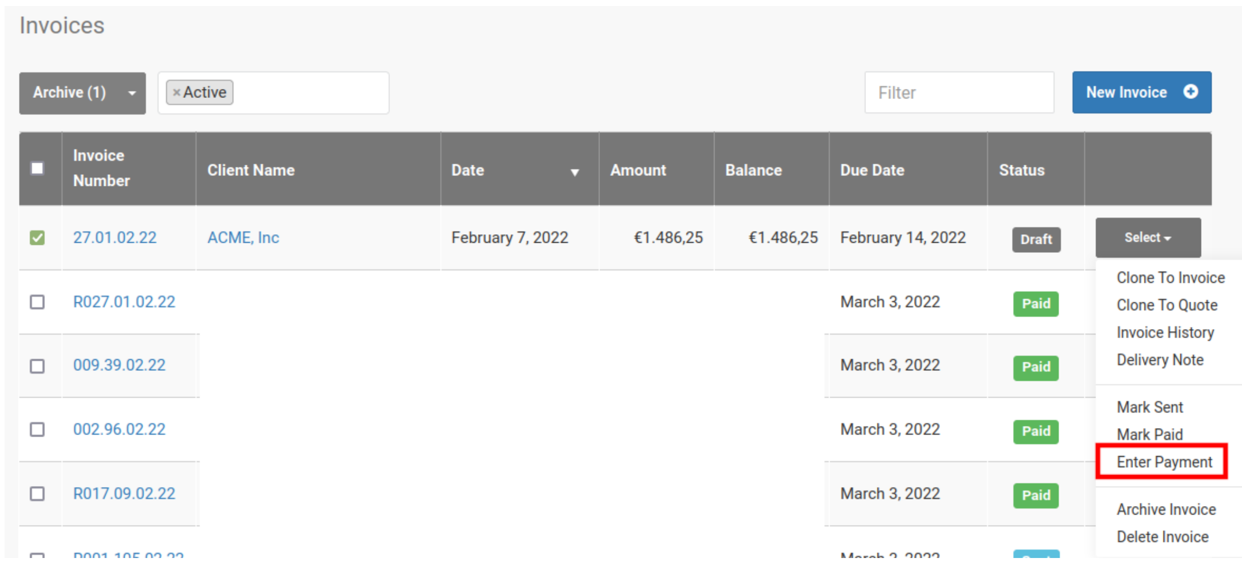
Now that you have sent your first invoices to your clients, the invoices need to be paid.

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:



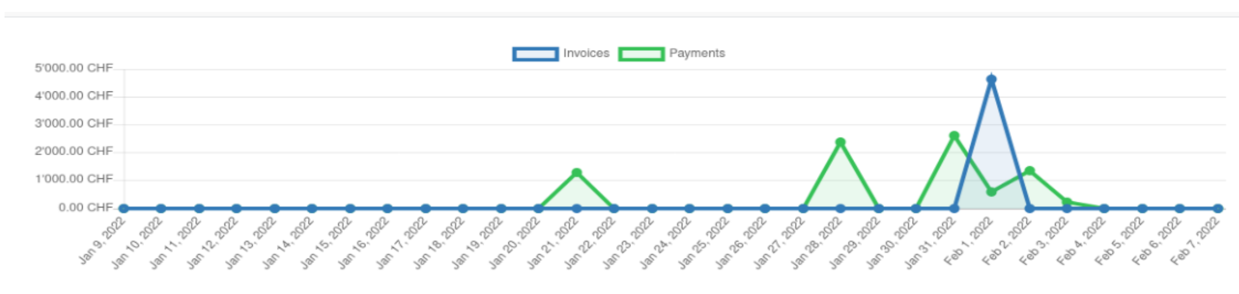
Another method to enter a payment is to list the invoices ("Invoices" in the navigation), hover over an invoice line, then click on the appearing "Select" drop down menu and click on "Enter Payment".



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.

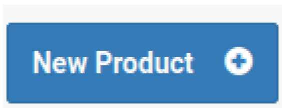
You will also notice that the "Dashboard" now contains blue and green graphs. Blue standing for the amount of the sent invoices, green for the amount of paid invoices.



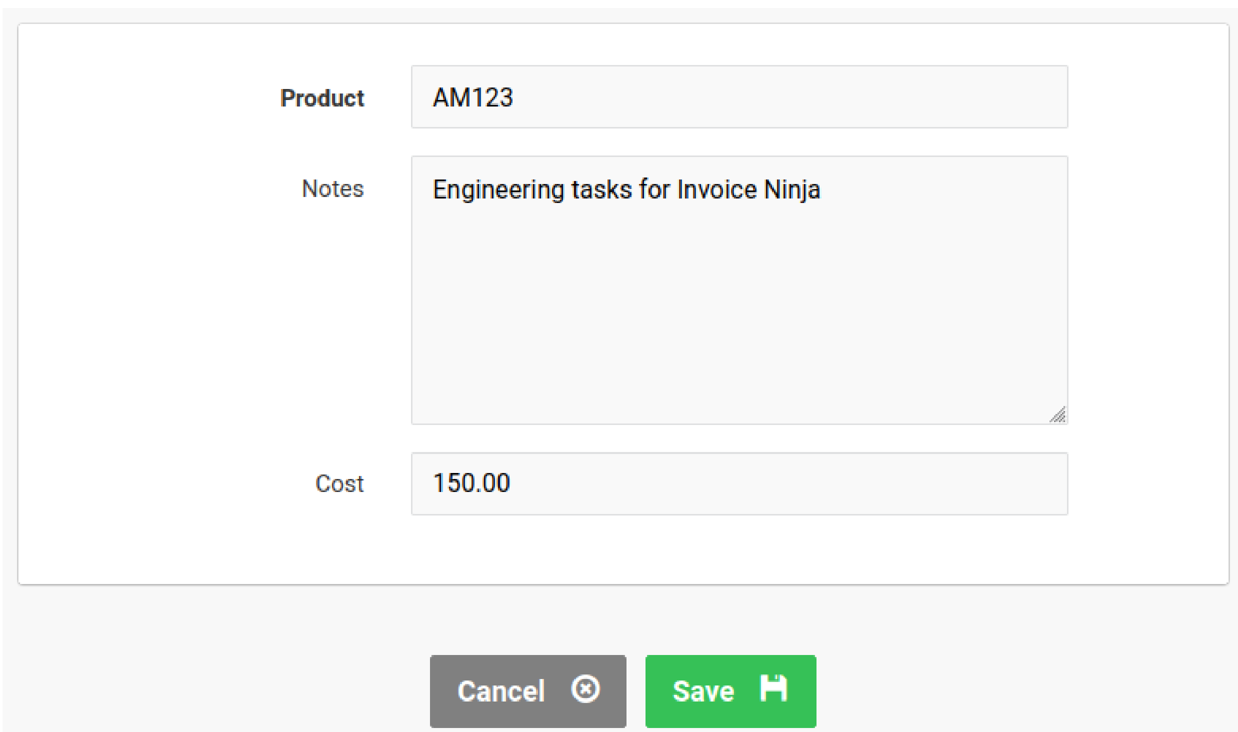
Using Products

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.

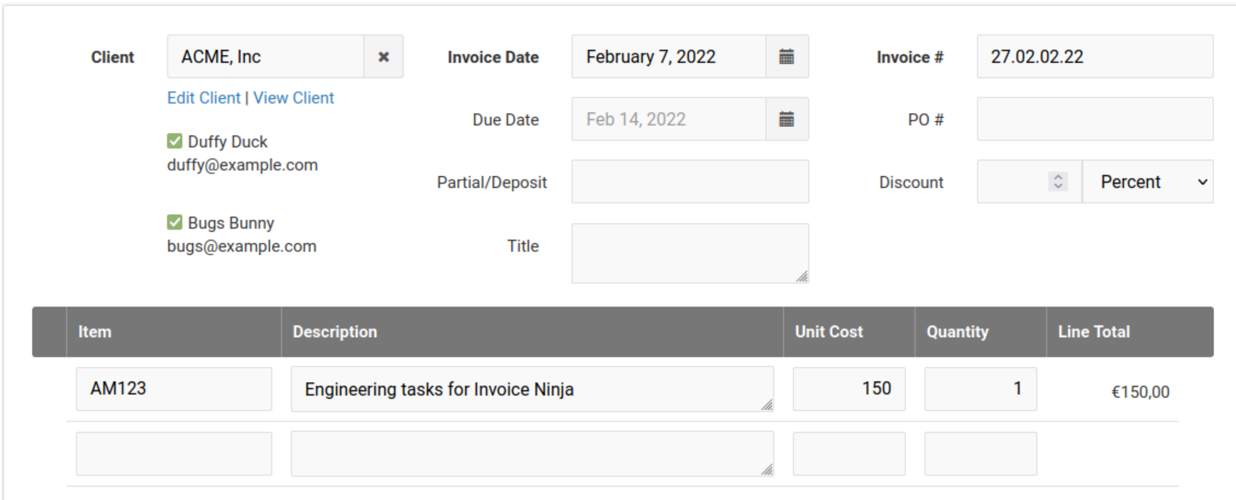


Then click on Save.

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.

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



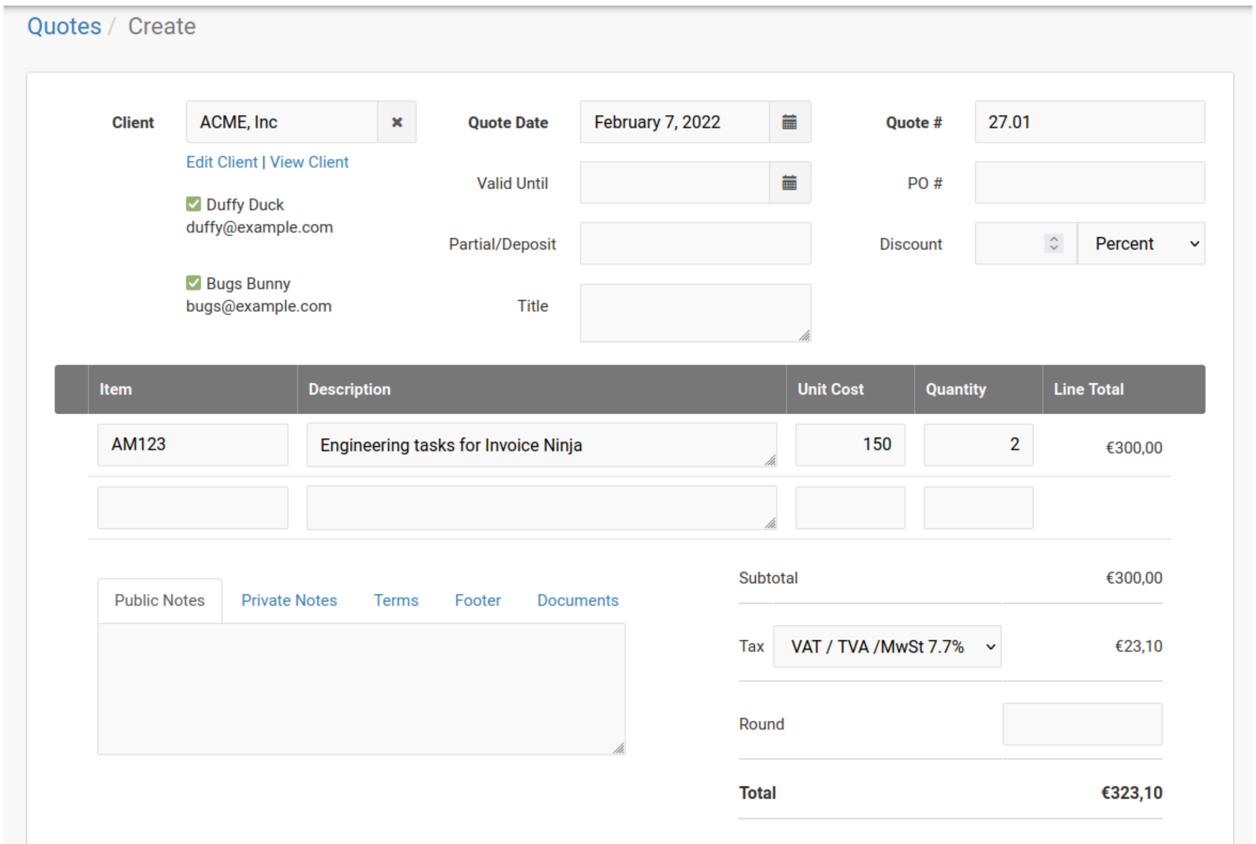
You just need to verify or set the Quantity field in this case - and you're all set.

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".

Creating a quote

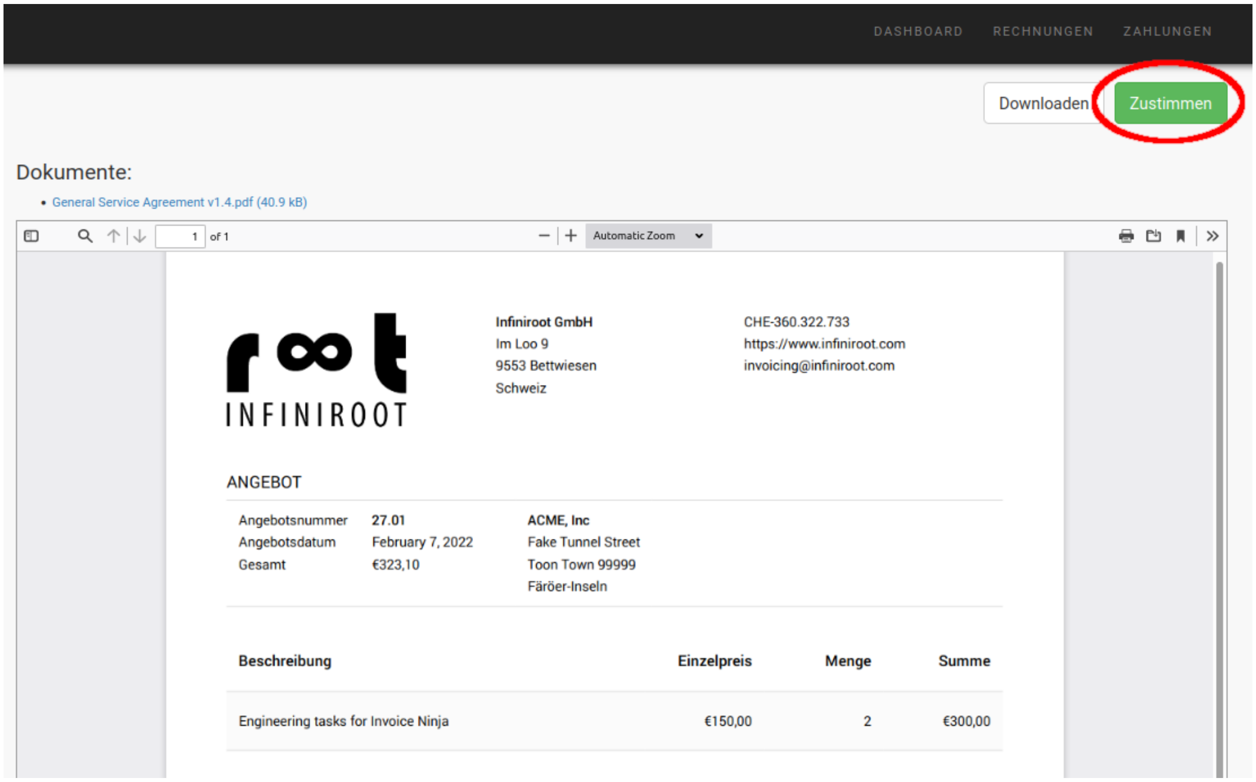
Sometimes you might need a customer to accept your services prior to starting your work. This is what a quote is about. It is basically a contract, describing the goods or services and their prices, the customer needs to approve.

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

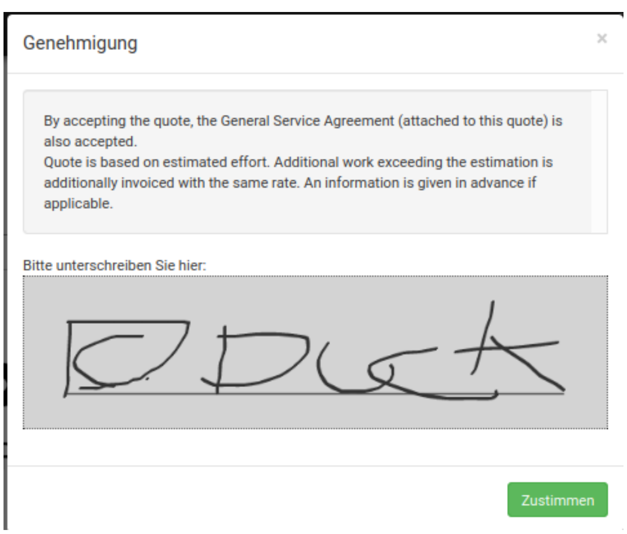


Just create the quote the same way you would create an invoice. You might add contract specific terms to the quote or add documents which further describe the nature of the quote.

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



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



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.

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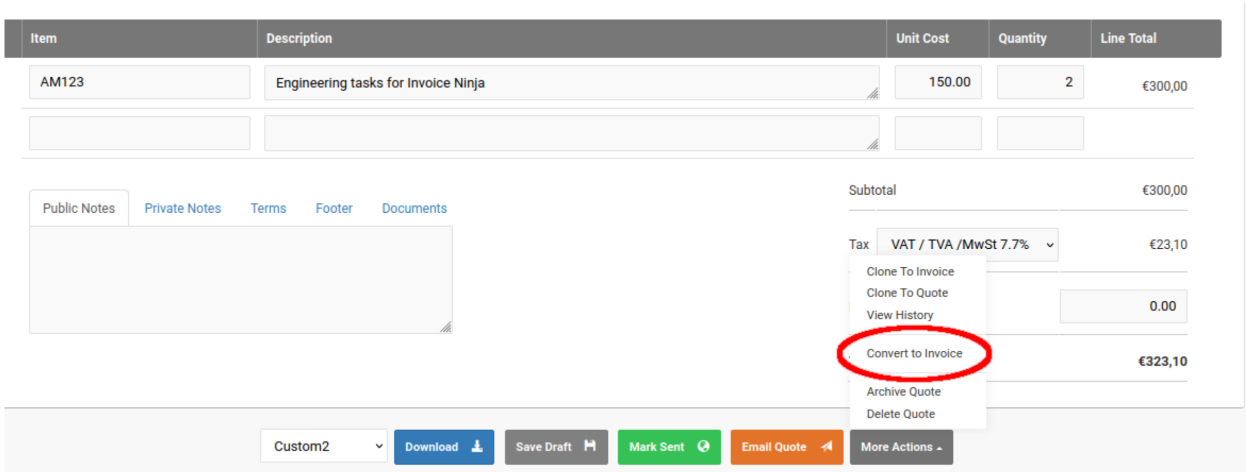
Once the quote was approved by the client, it can be converted into an invoice. Use the “More Actions” drop down menu and click on “Convert to Invoice”:



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.