SoloStaff Invoice Application

User Manual

Version: 0.4.1-alpha (Early Access) **Last Updated**: December 2025

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1. Welcome

About SoloStaff Invoice

SoloStaff Invoice is a professional desktop invoicing application designed for freelancers, consultants, and small businesses. It provides everything you need to create professional invoices, track payments, manage customers, and grow your business.

Key Features

- **Professional Invoicing** - Create, edit, and send polished invoices
- **Customer Management** - Maintain a complete database of clients and their billing information
- **Product Catalog** - Store your products and services for quick invoice creation
- **Recurring Invoices** - Automate regular billing with scheduled invoice generation
- **PDF Generation** - Generate professional PDF invoices with multiple template options
- **Email Integration** - Send invoices directly to customers via SMTP
- **Comprehensive Reports** - Track revenue, analyze trends, and monitor outstanding payments
- **Dark Mode** - Work comfortably with light or dark themes (toggle with Ctrl+Shift+T)
- **Accessibility** - Full keyboard navigation and screen reader support
- **Local-First** - Your data stays on your computer with no cloud dependencies

System Requirements

Component	Minimum	Recommended
RAM	4 GB	8 GB
Disk Space	200 MB	500 MB
Display	1280 x 720	1920 x 1080

Supported Platforms

Platform	Minimum Version
Windows	Windows 10 (64-bit)
macOS	macOS 10.14 Mojave
Linux	Ubuntu 20.04 LTS or equivalent

2. Installation

SoloStaff Invoice is distributed as a standalone application that includes everything needed to run. No additional software installation is required.

2.1 Windows

1. **Extract the distribution**

   - Extract `SoloStaff_Invoice_v0.4.1-alpha_Windows.zip` to your preferred location
   - Recommended: `C:\Program Files\SoloStaff Invoice\` or your user folder

2. **Run the application**

   - Double-click `SoloStaff_Invoice.exe` to launch

3. **Optional: Create a shortcut**

   - Right-click `SoloStaff_Invoice.exe`
   - Select "Create shortcut"
   - Move the shortcut to your Desktop or Start Menu

Windows Notes:

- **First Launch**: Windows SmartScreen may show a warning for unrecognized applications. Click "More info" then "Run anyway" to proceed.

- **Windows Defender**: For optimal startup performance, consider adding the application folder to Windows Defender exclusions:

  1. Open Windows Security
  2. Go to Virus & threat protection > Manage settings
  3. Scroll to Exclusions > Add or remove exclusions

4. Add the application folder

Data Locations (Windows):

Data	Location
Database	`%USERPROFILE%\.invoice_app\invoice_app.db`
Settings	`%APPDATA%\InvoiceApplication\config.json`
Backups	`%USERPROFILE%\.invoice_app\backups\`

2.2 macOS

1. **Extract the distribution**

   ○ Extract `SoloStaff_Invoice_v0.4.1-alpha_macOS.zip`
   ○ Drag `SoloStaff Invoice.app` to your Applications folder

2. **Run the application**

   ○ Open Applications and double-click `SoloStaff Invoice`
   ○ Or use Spotlight: Press Cmd+Space, type "SoloStaff", press Enter

macOS Notes:

- **Gatekeeper Warning**: On first launch, macOS may show "SoloStaff Invoice cannot be opened because it is from an unidentified developer."

  To open:

  1. Go to System Preferences > Security & Privacy > General
  2. Click "Open Anyway" next to the message about the blocked app
  3. Or: Right-click the app, select "Open", then click "Open" in the dialog

- **Apple Silicon (M1/M2/M3)**: The application runs natively on Apple Silicon Macs

Data Locations (macOS):

Data	Location
Database	`~/.invoice_app/invoice_app.db`
Settings	`~/Library/Application Support/InvoiceApplication/config.json`
Backups	`~/.invoice_app/backups/`

2.3 Linux

1. **Extract the distribution**

```
tar -xzf SoloStaff_Invoice_v0.4.1-alpha_Linux_x64.tar.gz
```

2. **Make executable** (if needed)

```
chmod +x SoloStaff_Invoice
```

3. **Install Qt dependencies** (if not already present)

   Ubuntu/Debian:

   ```
   sudo apt install libxcb-cursor0 libxcb-xinerama0
   ```

   Fedora/RHEL:

   ```
   sudo dnf install xcb-util-cursor
   ```

   Arch Linux:

   ```
   sudo pacman -S xcb-util-cursor
   ```

4. **Run the application**

   ```
   ./SoloStaff_Invoice
   ```

Linux Notes:

- **Desktop Entry**: To add the application to your application menu, create
  `~/.local/share/applications/solostaff-invoice.desktop`:

  ```
  [Desktop Entry]
  Name=SoloStaff Invoice
  Comment=Professional invoicing application
  Exec=/path/to/SoloStaff_Invoice
  Icon=/path/to/icon.png
  Type=Application
  Categories=Office;Finance;
  ```

- **Wayland/X11**: The application supports both display servers

- **WSL2**: Running under Windows Subsystem for Linux requires WSLg (Windows 11) or an X server like VcXsrv

Data Locations (Linux):

Data	Location
Database	`~/.invoice_app/invoice_app.db`
Settings	`~/.config/invoice-application/config.json`
Backups	`~/.invoice_app/backups/`

2.4 Verifying Installation

After launching the application:

1. The main window should appear with the Dashboard view
2. Navigate to **Help > About** to verify the version is 0.4.1-alpha
3. Go to **Edit > Settings** to confirm all options are accessible

3. Getting Started

3.1 First Launch

When you first launch SoloStaff Invoice, you'll be greeted with the Dashboard - your central hub for managing invoices.
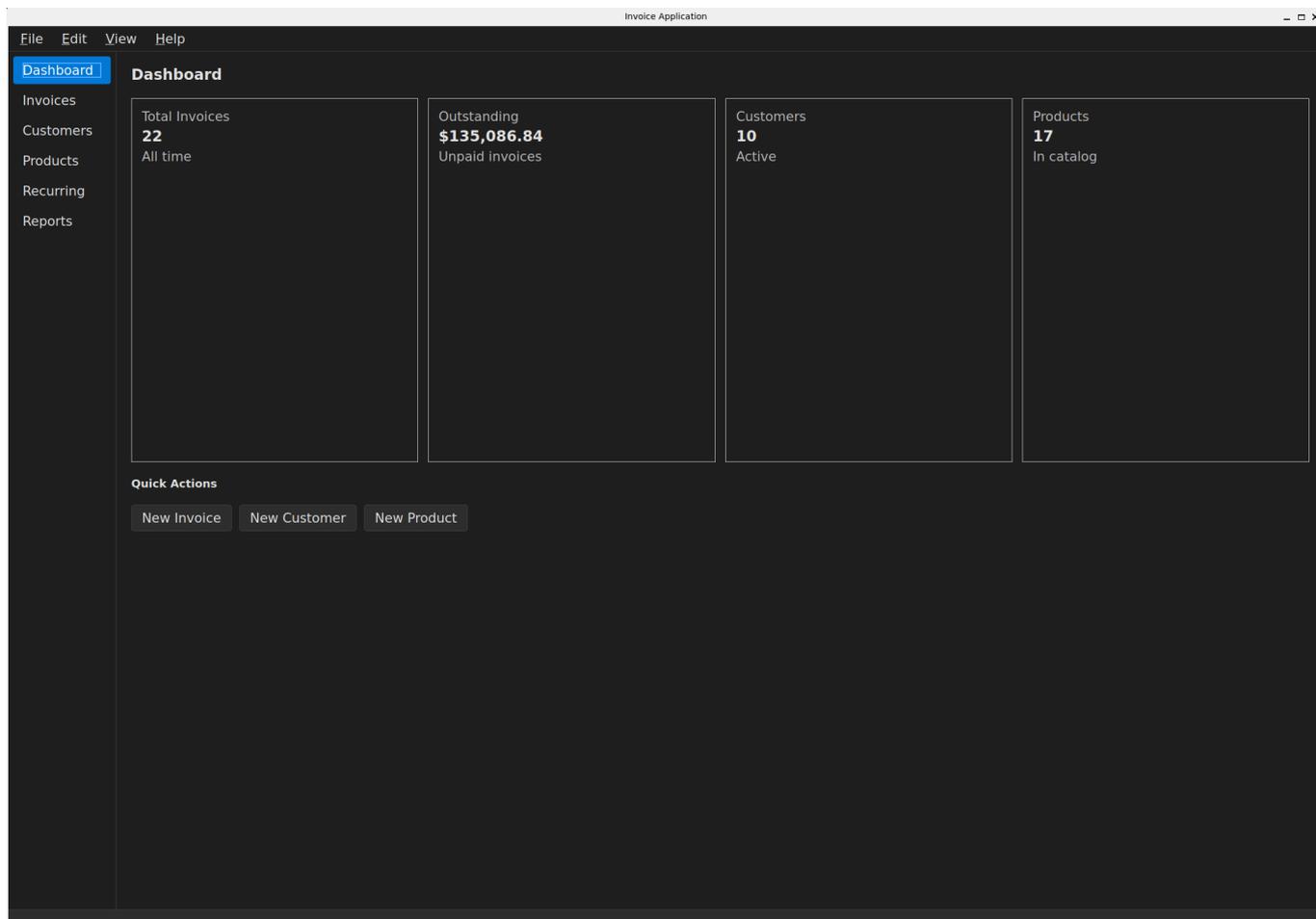
The Dashboard provides quick access to all features and shows your recent activity

3.2 Quick Start: Your First Invoice

Follow these steps to create your first invoice:

Step 1: Configure Your Business

1. Press **Ctrl+,** (Windows/Linux) or **Cmd+,** (macOS) to open Settings
2. Navigate to the **Business** tab
3. Enter your business details:
    - Business name
    - Address
    - Phone and email
    - Website
4. Click **Save**

Step 2: Configure Tax Settings

1. In Settings, navigate to the **Tax** tab
2. Enter your tax information:
    - Tax name (e.g., "HST", "VAT", "GST")
    - Tax rate percentage
    - Tax registration number (optional)
3. Click **Save**

Step 3: Add a Customer

1. Go to **View > Customers** from the menu
2. Click **New Customer** or press **Ctrl+Shift+C**
3. Enter the customer's details:
    - Name (required)
    - Email address
    - Phone number
    - Address
4. Click **Save**

Step 4: Add Your Products/Services (Optional)

1. Go to **View > Products** from the menu
2. Click **New Product** or press **Ctrl+Shift+O**
3. Enter product details:
    - Name
    - Description
    - Default price
    - SKU (optional)
4. Click **Save**

Step 5: Configure Email (Before Sending Invoices)

Before you can email invoices, you must configure your email settings:

1. Go to **Edit > Settings** (Ctrl+,)
2. Click **Configure SMTP** or navigate to email settings
3. Enter your SMTP server details:
   - SMTP Server (e.g., smtp.gmail.com)
   - Port (typically 587 for TLS)
   - Username and password
4. Click **Test Connection** to verify
5. Click **Save**

Gmail Users: You must use an App Password:

1. Enable 2-Step Verification on your Google account
2. Go to App Passwords
3. Generate a password for "Mail"
4. Use this app password (not your regular password)

Step 6: Create an Invoice

1. Go to **View > Invoices** from the menu
2. Click **New Invoice** or press **Ctrl+N**
3. Select your customer from the dropdown
4. Add line items:
   - Select from your product catalog, or
   - Enter custom item details
5. Review the totals (subtotal, tax, total)
6. Click **Save as Draft** or **Issue** to finalize

Step 7: Send the Invoice

1. Select the invoice in the list
2. Click **Email** or press **Ctrl+M**
3. Review the email recipient, subject, and message
4. Click **Send**

3.3 Understanding the Interface

The application uses a consistent layout across all sections:

- **Menu Bar**: Access all features via File, Edit, View, and Help menus
- **Left Sidebar**: Navigate between main sections (Dashboard, Invoices, Customers, Products, Recurring, Reports)
- **Toolbar**: Quick access to common actions
- **Main Content Area**: Lists, forms, and details
- **Status Bar**: Current status and notifications

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4. The Dashboard

The Dashboard is your command center, providing an overview of your invoicing activity and quick access to common tasks.
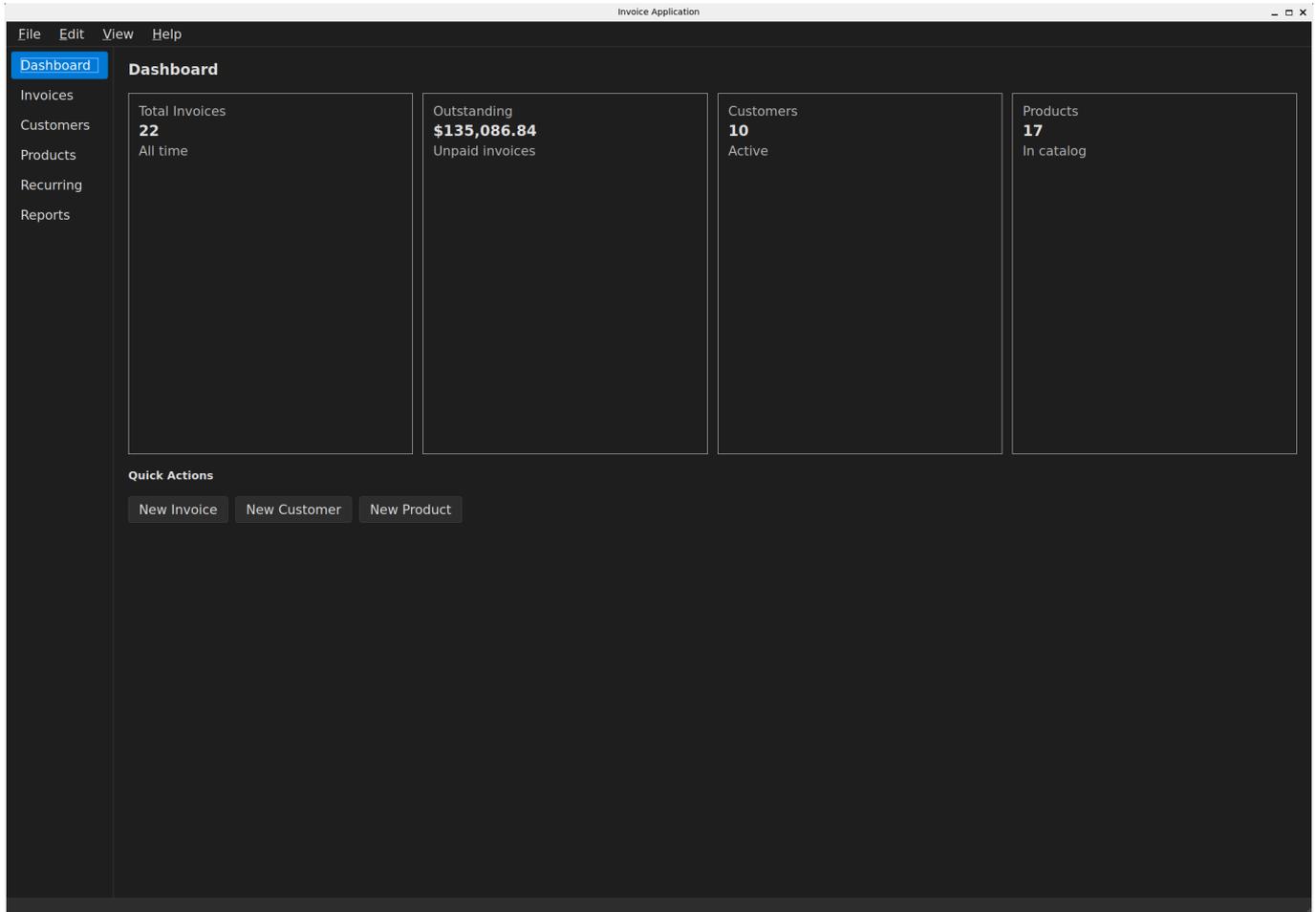
Dashboard showing summary statistics, recent invoices, and quick actions

Dashboard Components

Section	Description
Summary Cards	Key metrics: outstanding balance, overdue invoices, monthly revenue
Recent Invoices	Your most recently created or modified invoices
Quick Actions	Buttons for common tasks like creating a new invoice
Activity Feed	Recent changes and notifications

Quick Actions

- **New Invoice**: Create a new invoice (Ctrl+N)
- **New Customer**: Add a new customer (Ctrl+Shift+C)
- **New Product**: Add a new product (Ctrl+Shift+O)
- **View Reports**: Jump to analytics

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5. Settings & Configuration

Access Settings via **Edit > Settings** or press **Ctrl+,** (Cmd+, on macOS).

5.1 Business Settings

Configure your business information that appears on invoices.

Enter your business name, address, and contact information

Field	Description
Business Name	Your company or trading name

Field	Description
Business Email	Primary business email address
Business Phone	Business phone number
Business Website	Your company website
Business Address	Full street address (multi-line)

Company Logo

Add your company logo to appear on generated PDF invoices. The logo section is located at the bottom of the Business tab.

Logo Requirements:

Requirement	Value
Supported Formats	PNG, JPG, JPEG, GIF, BMP
Maximum File Size	2 MB
Maximum Dimensions	800 × 300 pixels
Recommended Size	400 × 150 pixels for best quality

To Upload a Logo:

1. Click **Upload Logo...** button
2. Select an image file from your computer
3. The logo preview will display your selected image
4. Click **Save** to apply the logo to your invoices

To Remove a Logo:

1. Click **Clear Logo** button
2. Click **Save** to confirm

Tips:

- Use a PNG file with a transparent background for best results
- Keep the logo simple and readable at small sizes
- The logo will automatically scale to fit invoice templates while maintaining aspect ratio
- If your logo doesn't appear on PDFs, verify the file exists and meets the size requirements

5.2 Invoice Settings

Customize how invoices are numbered and configured.

Configure invoice numbering, due dates, and default values

Invoice Numbering:

Setting	Description
Prefix	Text before the number (e.g., "INV-")
Starting Number	Next invoice number to use
Padding	Number of digits (e.g., 4 = 0001)
Separator	Character between prefix and number
Include Year	Add year to invoice number
Include Month	Add month to invoice number
Reset Yearly	Reset numbering each January

Invoice Defaults:

Setting	Description

Setting	Description
Payment Due (days)	Default days until payment is due
Default Terms	Terms text (supports {days} placeholder)
Default Notes	Notes that automatically appear on all new invoices (see below)

Default Notes vs Invoice Notes:

- **Default Notes** (Settings > Invoice): Text entered here is automatically copied to the Notes field when creating a new invoice. This is useful for standard information you want on every invoice, such as payment instructions, bank details, or company policies.

- **Notes** (on individual invoice): When editing an invoice, you can modify the Notes field for that specific invoice. Changes only affect that invoice and do not update the Default Notes setting or other invoices.

> **Planned Feature**: Multi-currency support is planned for a future release. This will include a home currency selection setting in Invoice Settings, allowing you to create invoices in different currencies with automatic conversion.

5.3 Tax Settings

Configure tax rates for your invoices.

Set up your default tax rate and tax name

Primary Tax:

Setting	Description
Tax Name	Name displayed on invoices (e.g., "HST", "VAT", "GST")
Tax Rate	Percentage applied to invoices (e.g., 13%)
Tax Number	Your tax registration number

Secondary Tax (Optional):

Setting	Description
Secondary Tax Name	Second tax name (e.g., "PST")
Secondary Tax Rate	Second tax percentage

5.4 Preferences

Customize the application behavior and database settings.
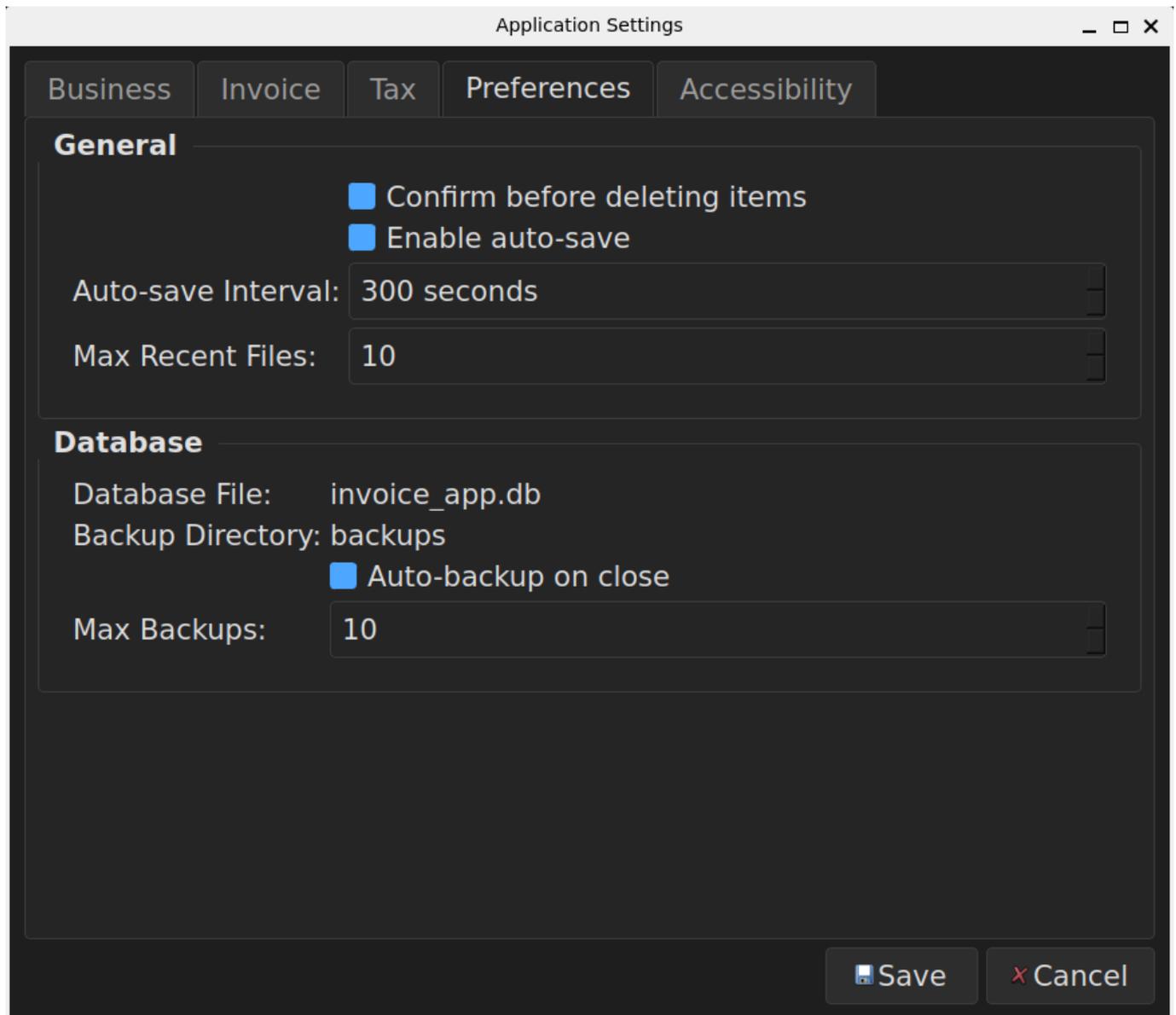
Configure general preferences and backup settings

General:

Setting	Description
Confirm before deleting items	Show confirmation dialog before deleting records
Enable auto-save	Automatically save invoice drafts while editing
Auto-save Interval	Time between auto-saves in seconds (default: 300)
Max Recent Files	Number of recent files to track

Database:

Setting	Description
Database File	Name of the database file (read-only)
Backup Directory	Folder where backups are stored

Setting	Description
Auto-backup on close	Automatically create backup when exiting the application
Max Backups	Number of backup files to retain (older backups are deleted)

5.5 Accessibility Settings

Note: To toggle between light and dark mode, press **Ctrl+Shift+T** at any time.

Customize font size and visual accessibility options for improved usability.
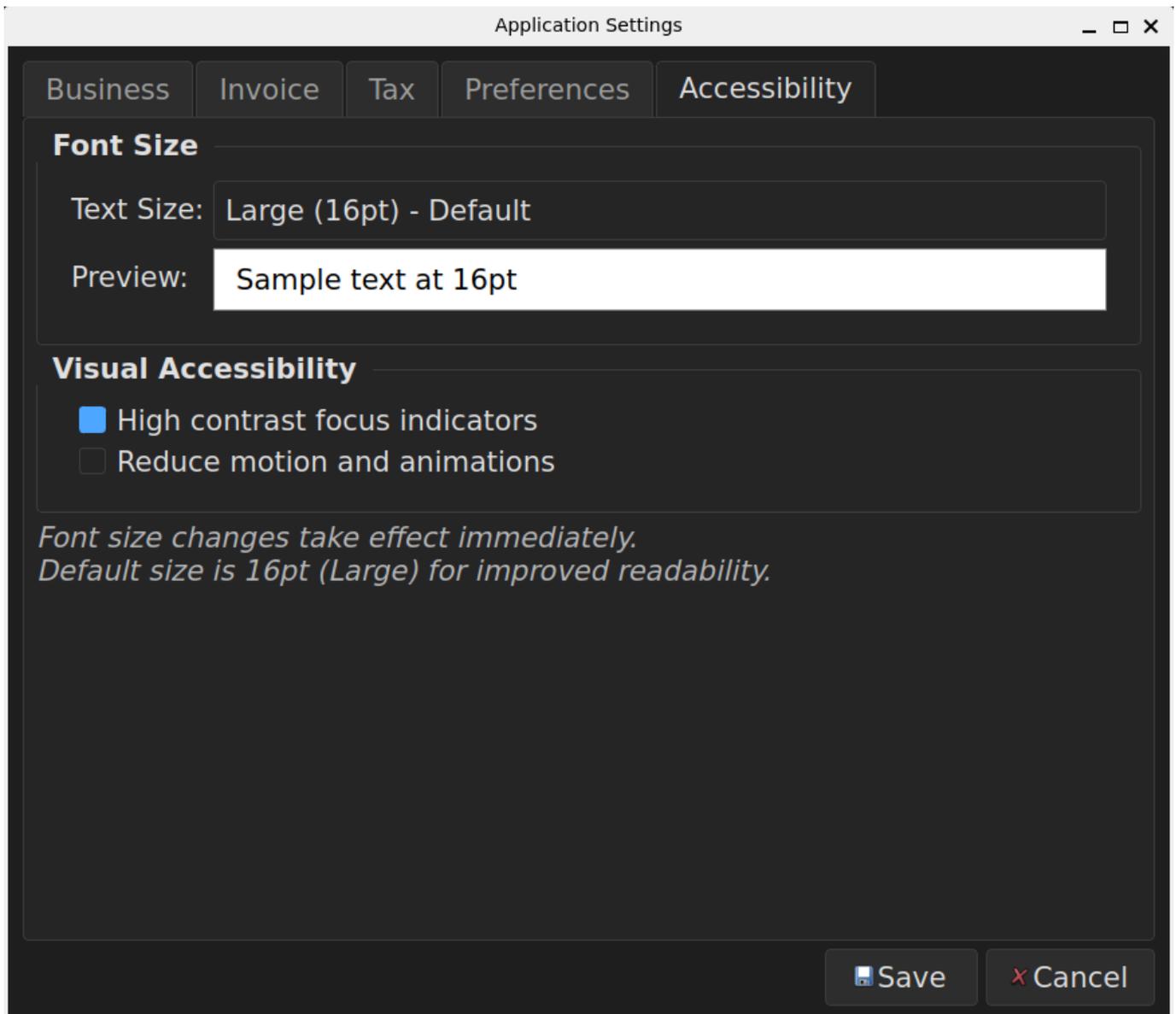
Adjust text size and enable accessibility features

Font Size:

Setting	Description
Text Size	Select from preset sizes: Small (12pt), Medium (14pt), Large (16pt - Default), or Extra Large (20pt)
Preview	Live preview showing sample text at the selected size

Font size changes take effect immediately throughout the application.

Visual Accessibility:

Setting	Description
High contrast focus indicators	Enhanced visual highlighting for keyboard-focused elements
Reduce motion and animations	Minimize interface animations for users sensitive to motion

5.6 Email Settings

Configure SMTP for sending invoices by email.

Enter your SMTP server details to enable email sending

You must configure email before sending invoices.

Setting	Description
Email Provider	Select Gmail, Outlook, Yahoo, or Custom
SMTP Server	Mail server address (auto-fills for known providers)
Port	SMTP port (typically 587 for TLS)

Setting	Description
STARTTLS	Enable STARTTLS encryption
SSL/TLS	Enable SSL/TLS encryption
Username	Your email account username
Password	Email password or app password
Sender Name	Your name as it appears to recipients
Sender Email	Reply-to email address

Important: Click **Test Connection** to verify your settings work correctly before attempting to send invoices.

Gmail Setup:

1. Enable 2-Step Verification on your Google account
2. Go to App Passwords (Google Account > Security > App passwords)
3. Generate a password for "Mail"
4. Use this app password in the Password field (not your regular Google password)

5.7 Email Templates

Customize email templates for different scenarios.
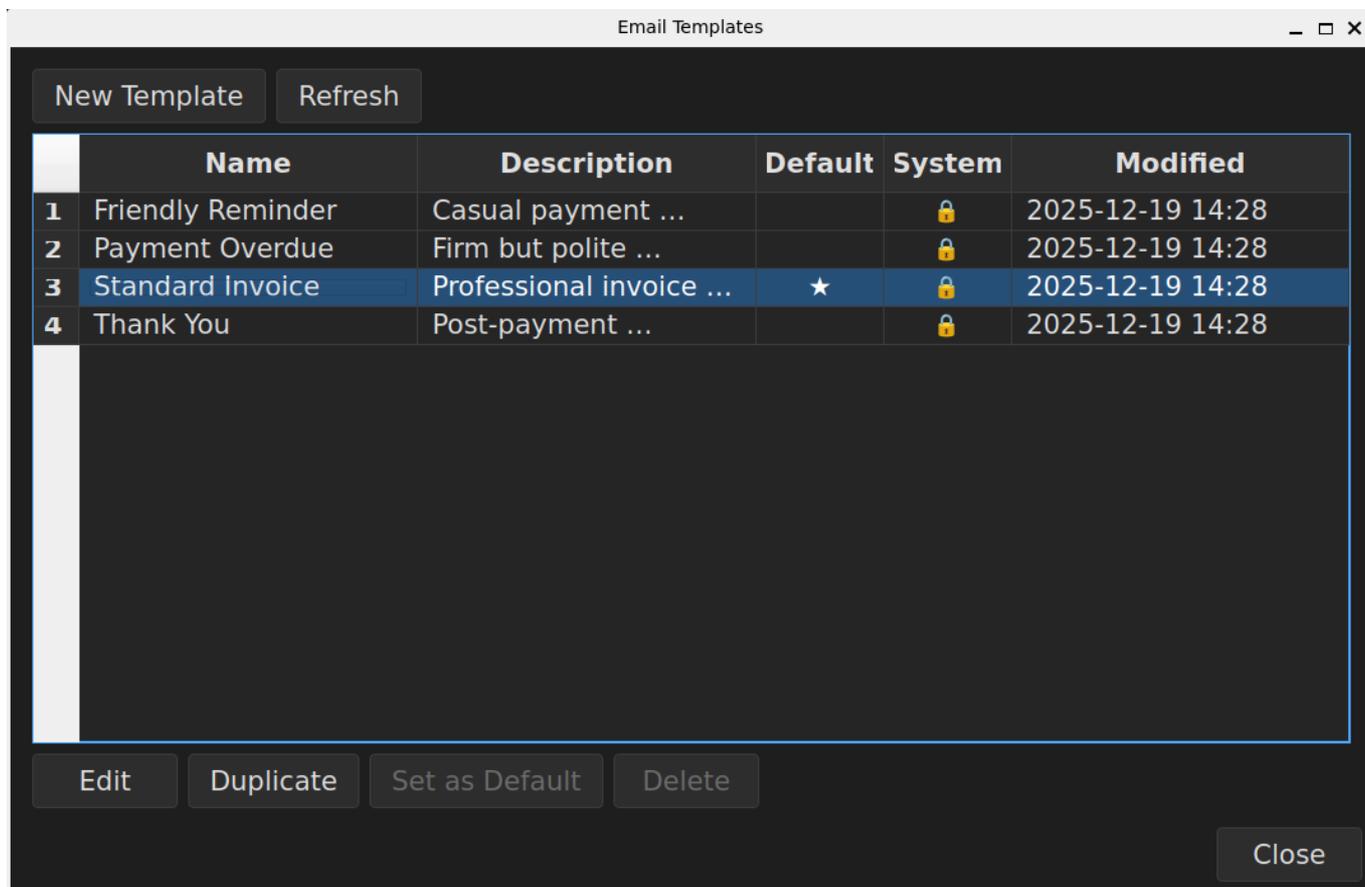
Edit email templates with variable placeholders

Available templates:

- **Invoice Email**: Default template when emailing an invoice
- **Payment Reminder**: For overdue invoice reminders
- **Thank You**: Confirmation after payment received

Available Variables:

Variable	Description
{{customer_name}}	Customer's full name
{{customer_company}}	Customer's company name
{{invoice_number}}	Invoice number
{{invoice_date}}	Invoice issue date
{{due_date}}	Payment due date
{{amount}}	Invoice total amount
{{amount_due}}	Remaining balance owed
{{terms}}	Payment terms text
{{notes}}	Invoice notes
{{business_name}}	Your business name
{{business_email}}	Your business email address
{{business_phone}}	Your business phone number

Creating Custom Templates:

To create a custom email template:

1. Select an existing template from the list that is closest to what you need
2. Click **Duplicate** to create a copy
3. Rename the new template to describe its purpose
4. Edit the subject line and body text as needed
5. Use the available variables to personalize the content
6. Click **Save** to store your custom template

You can create multiple templates for different scenarios, such as templates for different customer types or special promotions.

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6. Managing Invoices

The Invoices section is the heart of the application. Access it via **View > Invoices** from the menu.

6.1 Invoice List View

Invoice list in light theme showing all invoices with status indicators

Invoice list in dark theme - toggle with Ctrl+Shift+T

The invoice list shows:

- Invoice number
- Customer name
- Issue date and due date
- Total amount
- Status (color-coded)

Filtering and Search:

- Use the search box to filter by invoice number or customer name
- Use the status dropdown to filter by invoice status

6.2 Invoice Statuses

Status	Color	Description
Draft	Gray	Work in progress, not yet sent
Issued	Blue	Finalized and sent to customer
Paid	Green	Fully paid
Partial	Orange	Partially paid
Overdue	Red	Past due date, unpaid
Void	Dark Gray	Cancelled

6.3 Selecting and Viewing Invoices

Click on an invoice to select it and view more details.

Selected invoice with action buttons visible

6.4 Invoice Detail View

Double-click an invoice or click **View** to see full details.

Detailed view showing all invoice information and line items

The detail view shows:

- Complete header information
- All line items with quantities and prices
- Subtotal, tax, discounts, and total
- Payment history
- Notes and terms
- Action buttons for PDF, Email, Payment, etc.

6.5 Creating and Editing Invoices

Click **New Invoice** (Ctrl+N) or select a draft invoice and click **Edit**.

Invoice editor with customer selection, dates, and line items

Creating an Invoice:

1. Select a customer from the dropdown (required)
2. Set the issue date (defaults to today)
3. Set the due date (calculated from payment terms)
4. Add line items
5. Add notes if needed
6. Choose to **Save as Draft** or **Issue**

Note: Only draft invoices can be edited. Once issued, an invoice cannot be modified. To correct an issued invoice, void it and create a new one.

6.6 Managing Line Items

Line items can only be added, edited, or removed while an invoice is in **Draft** status. Once an invoice is issued, the line items are locked and cannot be modified.

Adding Line Items

Click the green **Add Item** button to add a new line to the invoice.

Line item editor with product selection and pricing

Field	Description
Product	Select from catalog or enter custom description
Description	Item description (auto-fills from product)
Quantity	Number of units
Unit Price	Price per unit
Discount	Optional percentage or fixed amount discount
Tax Rate	Tax percentage to apply

Field	Description
Amount	Calculated automatically

Editing Line Items

1. Select a line item in the table by clicking on it
2. Click the **Edit** button
3. Modify the fields as needed
4. Click **OK** to save changes

Deleting Line Items

If a line item was entered in error:

1. Select the line item in the table
2. Click the red **Delete** button (only enabled when an item is selected)
3. Confirm the deletion when prompted

The invoice totals are automatically recalculated after deleting a line item.

Reordering Line Items

Use the ↑ **Up** and ↓ **Down** buttons to change the order of line items on the invoice.

> **Important**: All line item operations (add, edit, delete, reorder) are only available for Draft invoices. The buttons are disabled for Issued, Paid, or other invoice statuses.

6.7 Recording Payments

For issued invoices, click **Record Payment** to log payments received.

1. Enter the payment amount (or click "Pay Full Amount")
2. Select the payment date
3. Choose the payment method:
   - Cash
   - Check
   - Bank Transfer
   - Credit Card
   - E-Transfer
   - Other
4. Add a reference number (check number, transaction ID, etc.)
5. Add notes if needed
6. Click **Save**

The invoice status updates automatically:

- **Partial** if payments are less than total
- **Paid** if payments equal or exceed total

6.8 Invoice Actions

Action	Description	How to Access
View	Open detail view	Double-click or select + View button
Edit	Modify draft invoice	Select draft + Edit button
Generate PDF	Export to PDF file	Select + Generate PDF button or Ctrl+P
Email	Send via email	Select + Email button or Ctrl+M
Record Payment	Log payment received	Select issued invoice + Record Payment
Issue	Finalize draft invoice	Select draft + Issue button
Void	Cancel invoice	Select + Void button
Delete	Remove draft invoice	Select draft + Delete button

6.9 Generating PDF Invoices

Create professional PDF invoices to send to customers, attach to emails, or keep for your records.

INVOICE

Stephen Bogner

1516 Crestwood Drive SE

Medicine Hat, Alberta

Canada T1A 7S8

Phone: (403) 878-3189

Email: stephenbogner@stephenbogner.com

Invoice #: INV-2025-0005
Issue Date: 2025-12-04
Due Date: 2026-01-03
Status: INVOICE

BILL TO:

Acme Corporation
123 Business Park Drive
Toronto, ON, M5V 2T6
billing@acmecorp.com

Description	Qty	Unit Price	Discount	Tax	Total
Custom Software License - Enterprise	1	$9,999.00	-	5.00%	$10,498.95
Training Session - Full Day (5 days)	5	$1,500.00	-	5.00%	$7,875.00
Technical Consultation - Implementation	40	$200.00	-	5.00%	$8,400.00
Project Management	20	$125.00	-	5.00%	$2,625.00

Subtotal: $27,999.00

Tax: $1,399.95

Total: **$29,398.95**

Notes:
Enterprise software implementation

Thank you for your business!

Phone: (403) 878-3189 | Email: stephenbogner@stephenbogner.com | Web: https://stephenbogner.com

Example PDF invoice generated with the Itemized template

How to Generate a PDF

1. Select an invoice from the invoice list
2. Click **Generate PDF** button (or press **Ctrl+P**)

3. In the PDF Export dialog:
    - Select a **Template** from the dropdown
    - Choose a **Save Location** (defaults to Documents folder)
    - Optionally enable **Open after export** to view immediately
4. Click **Export**

Available Templates

Template	Best For	Description
Itemized (Default)	Consulting, hourly services	Detailed line item breakdown with quantities, rates, and tax details
Summary	Simple transactions	Condensed format focusing on totals
Modern	Creative agencies, tech	Contemporary design with bold color accents and visual hierarchy
Classic	Traditional businesses	Professional, formal layout suitable for corporate clients

PDF Contents

Each generated PDF includes:

- **Header**: Your company name and logo (if configured)
- **Invoice Details**: Invoice number, issue date, due date, status
- **Customer Information**: Name, address, contact details
- **Line Items Table**: Description, quantity, unit price, discount, tax, and line total
- **Totals Section**: Subtotal, tax breakdown, total amount
- **Payment Information**: Amount paid and balance due (if applicable)
- **Footer**: Payment terms, notes, and your contact information

Tips for Professional PDFs

- **Add your logo** in Settings > Business to brand your invoices
- **Set your business information** completely for professional headers
- **Use clear descriptions** in line items for customer clarity
- **Add payment terms** to communicate expectations
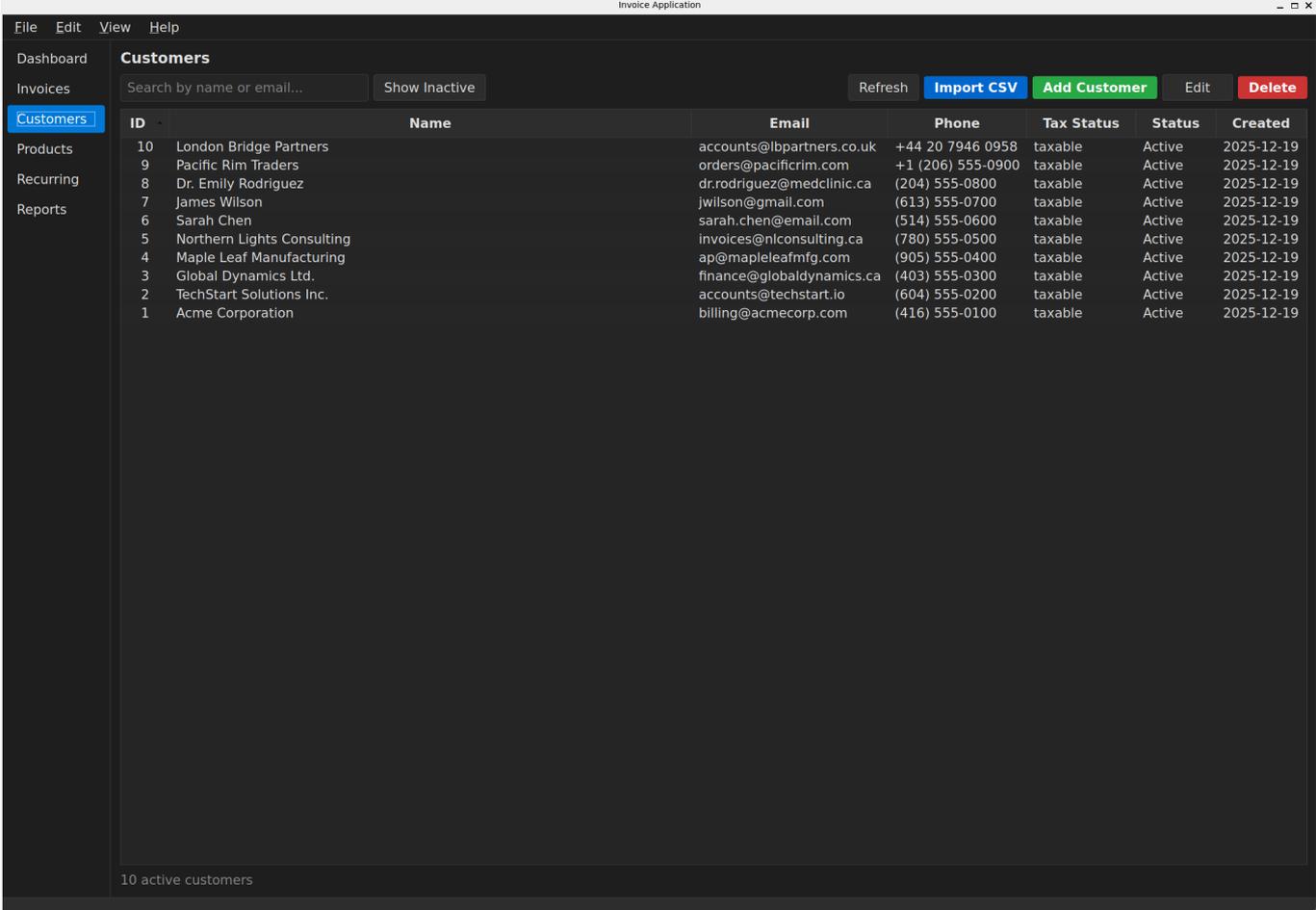- PDFs are generated at **300 DPI** for high-quality printing

Troubleshooting PDF Export

Issue	Solution
Logo not appearing	Verify logo file exists and meets size requirements (max 2MB, 800×300px)
PDF is blank	Ensure invoice has at least one line item
Cannot save PDF	Check write permissions for the destination folder
Business info missing	Complete your business details in Settings > Business

7. Managing Customers

The Customers section stores all your client information. Access it via **View > Customers** from the menu.

7.1 Customer List

Customer list showing all clients with contact information

The list displays:

- Customer/company name
- Email address
- Phone number
- City/location
- Tax Status (Taxable or Exempt)
- Active status

Tax Status Column:

The Tax Status indicates whether tax is applied to invoices for this customer:

- **Taxable** - Standard tax rates apply to all invoices
- **Exempt** - No tax is calculated on invoices for this customer

Common reasons a customer might be tax-exempt:

- **Registered charity or non-profit organization** - Many jurisdictions exempt charitable organizations from sales tax
- **Government agency** - Federal, provincial/state, or municipal governments are often exempt
- **Reseller with valid certificate** - Businesses purchasing for resale may be exempt with proper documentation
- **Indigenous/First Nations status** - Purchases by status Indigenous persons may be exempt in certain jurisdictions
- **Export sales** - Sales to customers outside your tax jurisdiction may be zero-rated
- **Specific industry exemptions** - Certain industries (e.g., agriculture, healthcare) may qualify for exemptions

> **Important**: Always verify tax-exempt status and retain supporting documentation (exemption certificates, tax numbers) for your records. Tax regulations vary by jurisdiction.

Use the search box to filter customers by name, email, or phone.

7.2 Adding and Editing Customers

Click **New Customer** (Ctrl+Shift+C) or select a customer and click **Edit**.

Customer form with all contact and billing fields

Field	Required	Description
Name	Yes	Customer or company name
Email	No	Primary email (used for invoices)

Field	Required	Description
Phone	No	Contact phone number
Address Line 1	No	Street address
Address Line 2	No	Suite, unit, building
City	No	City name
State/Province	No	State, province, or region
Postal Code	No	ZIP or postal code
Country	No	Country name (defaults to Canada)
Tax Status	No	Taxable or Exempt
Tax Number	No	Customer's tax ID (GST/HST/VAT)
Payment Terms	No	Default payment terms in days
Notes	No	Internal notes (not shown on invoices)

7.3 Deactivating Customers

Instead of permanently deleting customers (which would affect invoice history), you can deactivate them:

1. Select the customer
2. Click **Delete**
3. The customer is marked as inactive (soft delete)

Inactive customers:

- Don't appear in customer dropdowns when creating invoices
- Can be shown by toggling "Show Inactive" filter
- Retain all invoice history
- Can be reactivated if needed

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8. Managing Products

The Products section maintains your catalog of products and services. Access it via **View > Products** from the menu.

8.1 Product List

Product catalog showing items with prices and categories

The list displays:

- Product name
- SKU (Stock Keeping Unit)
- Unit price
- Tax Class
- Category
- Active status

Tax Class Column:

The Tax Class determines how tax is calculated when this product is added to an invoice:

Tax Class	Description
Standard	Full tax rate applies (default)
Reduced	Lower tax rate for qualifying items
Zero	0% tax rate (still reported for tax purposes)
Exempt	No tax applied (not reported)

Common examples by tax class:

- **Standard**: Most goods and services

- **Reduced**: Basic groceries, children's clothing (varies by jurisdiction)
- **Zero**: Exported goods, prescription medications
- **Exempt**: Financial services, medical services, educational services

> **Note**: Tax class settings on products interact with customer tax status. If a customer is marked as Tax Exempt, no tax is charged regardless of the product's tax class.

8.2 Adding and Editing Products

Click **New Product** (Ctrl+Shift+O) or select a product and click **Edit**.
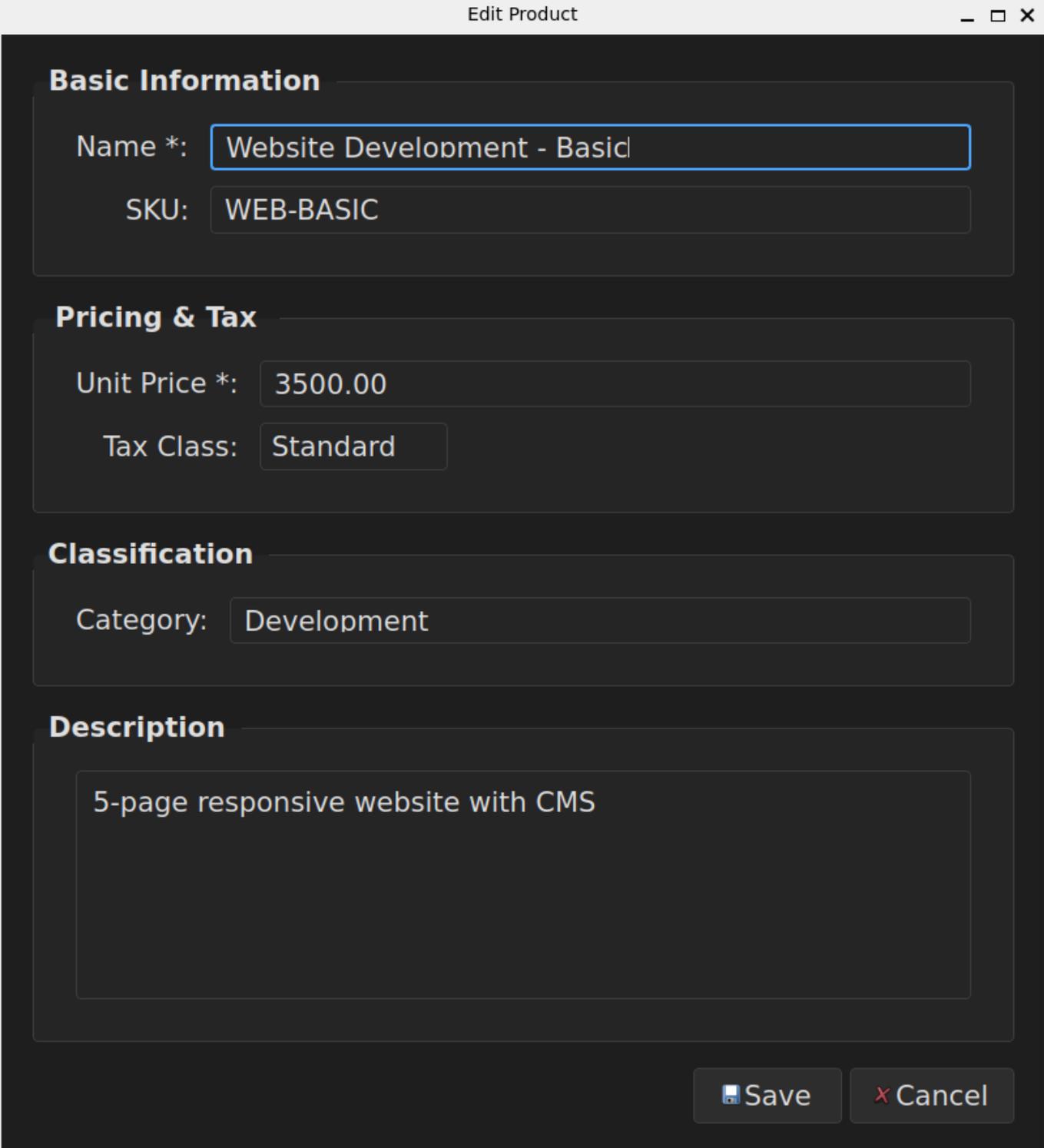
Product form with name, pricing, and category options

Field	Required	Description
Name	Yes	Product or service name
SKU	No	Unique product identifier
Unit Price	Yes	Default price per unit
Tax Class	No	Standard, Reduced, Zero, or Exempt
Category	No	Product category for organization
Description	No	Detailed description (appears on invoices)

8.3 Deactivating Products

Like customers, products use soft delete:

1. Select the product
2. Click **Delete**
3. The product is marked as inactive

Inactive products:

- Don't appear in product dropdowns when adding line items
- Can be shown with "Show Inactive" filter
- Can be reactivated if needed

8.4 Using Products in Invoices

When adding a line item to an invoice:

1. Start typing the product name in the Product field
2. Select from autocomplete suggestions
3. Description and price auto-fill from the product
4. Adjust quantity as needed
5. Override price if necessary for this invoice

---

9. Recurring Invoices

Set up automatic invoice generation for regular clients. Access via **View > Recurring** or press **Ctrl+R**.

9.1 Recurring Schedule List

List of recurring invoice schedules with status and next run date

The list shows:

- Schedule name/description
- Customer name
- Frequency (Monthly, Quarterly, etc.)
- Next generation date
- Status (Active, Paused, Completed)

9.2 Creating a Recurring Schedule

Click **New Schedule** to set up automatic invoicing.

Recurring schedule editor with frequency and template options

Field	Description
Schedule Name	Descriptive name for the schedule
Customer	Select the customer for recurring invoices
Template Invoice	Select an existing invoice as template
Auto-Issue	Automatically issue generated invoices (see below)
Frequency	Weekly, Bi-weekly, Monthly, Quarterly, or Annual
Start Date	When to begin generating invoices
End Condition	No end, End by date, or End after X occurrences

Auto-Issue Option:

The Auto-Issue checkbox controls what happens when an invoice is generated:

- **Disabled (default)**: Invoices are created as **Draft** status. You can review each invoice before issuing and sending to the customer. Recommended for schedules where amounts may vary or you want to verify before sending.

- **Enabled**: Invoices are automatically set to **Issued** status immediately upon generation. Use this for consistent, predictable invoices that don't require review (e.g., fixed monthly retainers).

> **Note**: If auto-issue fails (e.g., template has no line items), the invoice is still created as a draft so you don't lose the generation.

9.3 How Recurring Invoices Work

1. **On application startup**, the system checks for due schedules
2. **Invoices are generated** from the template with the current date
3. **If Auto-Issue is enabled**, invoices are immediately issued
4. **A notification appears** showing how many invoices were created
5. **Review and send** drafts, or configure email automation for issued invoices

9.4 Managing Schedules

Action	Description
Pause	Temporarily stop generation
Resume	Restart a paused schedule
Edit	Modify schedule settings
View History	See all invoices generated from this schedule
Generate Now	Create next invoice immediately
Delete	Remove the schedule

10. Reports & Analytics

The Reports section provides insights into your business performance. Access via **View > Reports** from the menu.

Reports are organized in tabs:

- **Analytics** - Top Customers, Product Performance, Revenue Trends, Period Comparison
- **Tax Summary** - Tax collected by period and rate
- **Revenue Summary** - Detailed revenue metrics and collection rates
- **Aging Report** - Outstanding invoices by age bucket

10.1 Top Customers Report

Bar chart showing your highest-revenue customers

This report shows:

- Customer ranking by revenue
- Total revenue per customer
- Invoice count per customer
- Percentage of total revenue

10.2 Product Performance Report
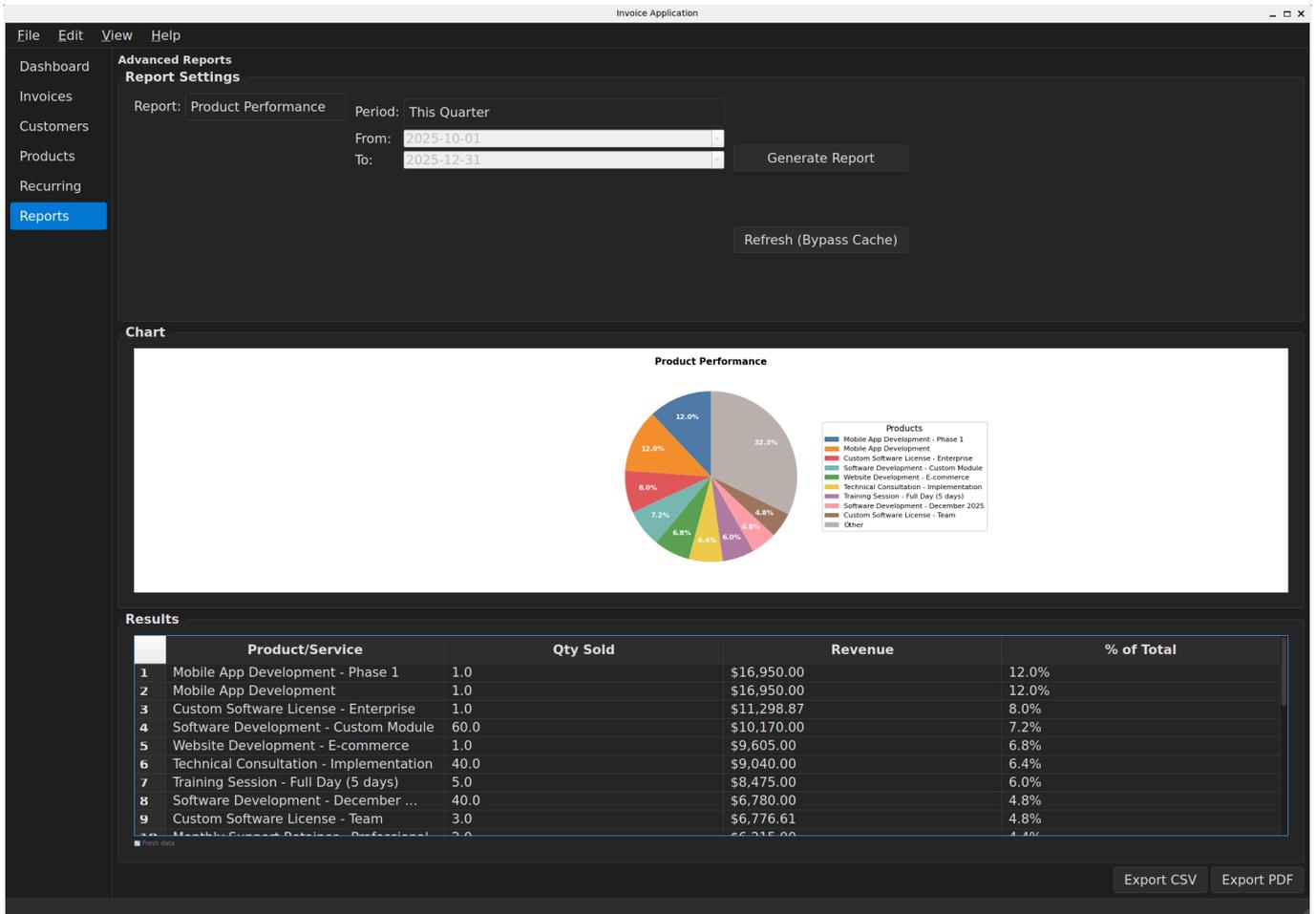
Pie chart showing sales by product

This report shows:

- Product ranking by revenue
- Revenue breakdown by product
- Visual representation of product mix

10.3 Revenue Trends Report
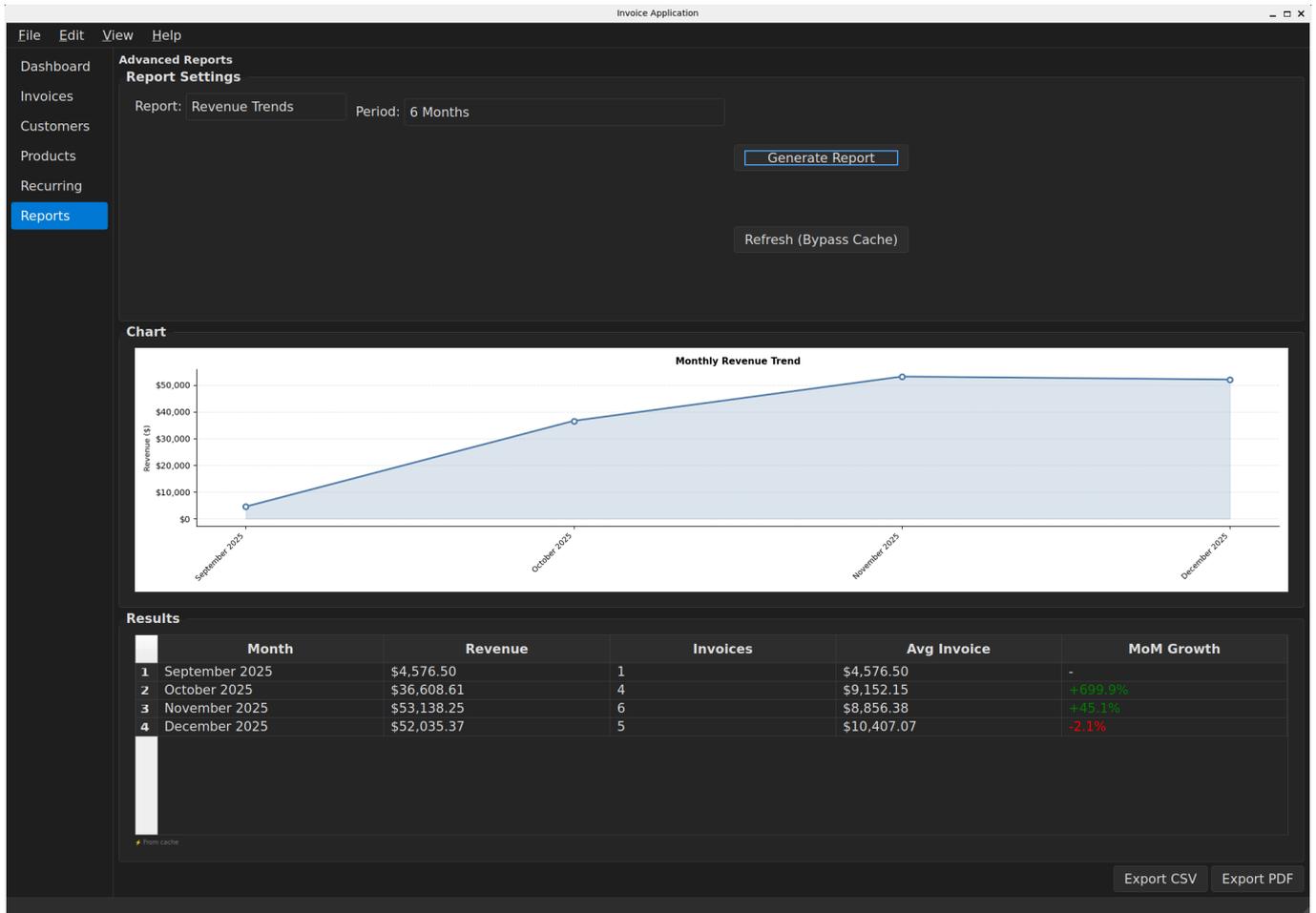
Line chart showing revenue over time

This report shows:

- Monthly revenue totals over time
- Invoice count per month
- Average invoice value per month
- Month-over-month growth percentage
- Visual trend line for revenue patterns

10.4 Period Comparison Report
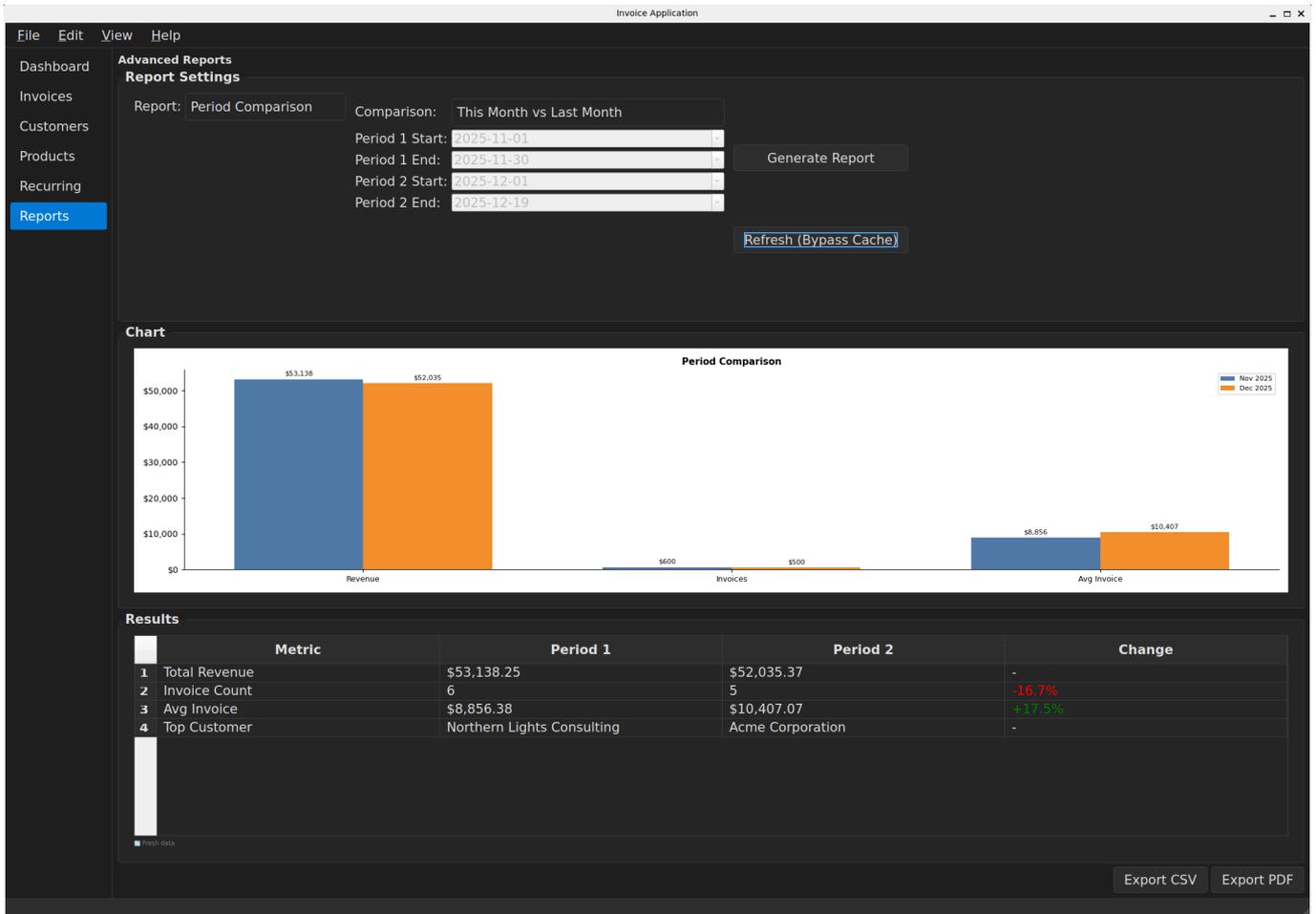
Side-by-side comparison of two time periods

Compare metrics between two periods:

- Total revenue
- Invoice count
- Average invoice value
- Growth/decline percentage

10.5 Tax Summary Report

Available under the Tax Summary tab

Tax summary showing collected taxes by rate

The Tax Summary report shows tax collected across your invoices:

- **Date Range Selection**: Choose start and end dates
- **Status Filter**: All, Draft, Issued, Paid, or Overdue
- **Summary Cards**: Total tax collected, taxable amount, and average tax rate
- **Breakdown Table**: Tax details by rate showing:
    - Tax rate percentage
    - Taxable amount
    - Tax collected
    - Number of invoices

Click **Export CSV** to download the tax data for accounting purposes.

10.6 Revenue Summary Report

Available under the Revenue Summary tab
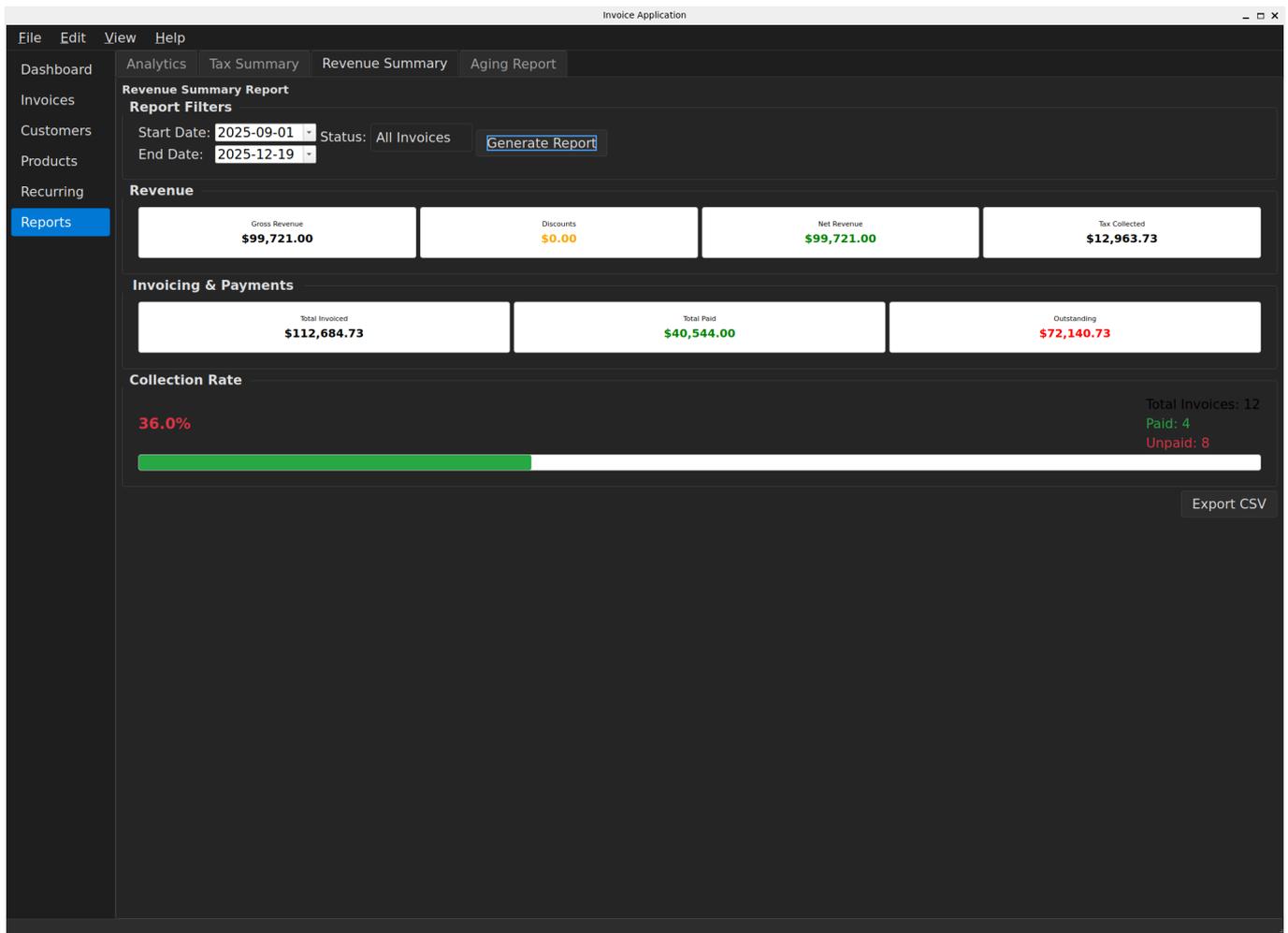
Revenue metrics with collection rate progress bar

The Revenue Summary provides detailed revenue metrics:

- **Gross Revenue**: Total invoiced amount before discounts
- **Discounts Given**: Total discounts applied
- **Net Revenue**: Revenue after discounts
- **Tax Collected**: Total tax on invoices
- **Amount Paid**: Payments received
- **Outstanding**: Unpaid invoice balance
- **Collection Rate**: Visual progress bar showing percentage collected

Use the date range and status filters to focus on specific periods or invoice types.

10.7 Aging Report

Available under the Aging Report tab
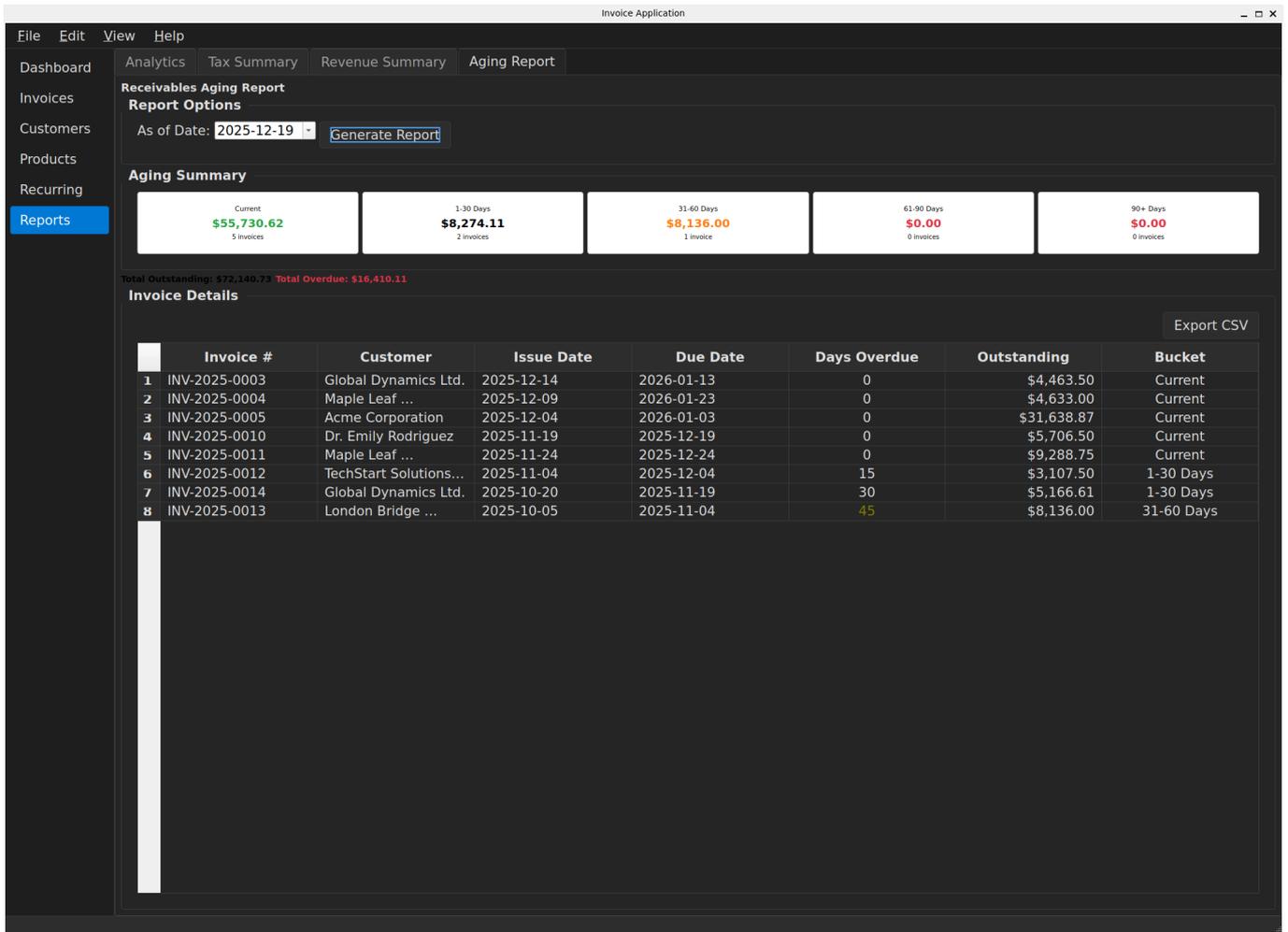
Receivables aging with bucket summary and invoice details

The Aging Report shows outstanding receivables by age bucket:

Bucket	Description
Current	Not yet due
1-30 Days	1-30 days overdue
31-60 Days	31-60 days overdue
61-90 Days	61-90 days overdue
90+ Days	Over 90 days overdue

Each bucket displays:

- Number of overdue invoices
- Total amount outstanding
- Percentage of total receivables

The detail table lists individual overdue invoices with customer name, invoice number, issue date, due date, days overdue, and amount. Click **Export CSV** for collection follow-up.

10.8 Exporting Reports

All reports can be exported:

1. Generate the report you need
2. Click **Export**
3. Choose format:
   - **CSV**: Data for spreadsheets
   - **PDF**: Formatted document (Advanced Reports only)
4. Charts can be exported as PNG images

---

11. Import & Export

11.1 Exporting Data

Export your data for backup or use in other applications.
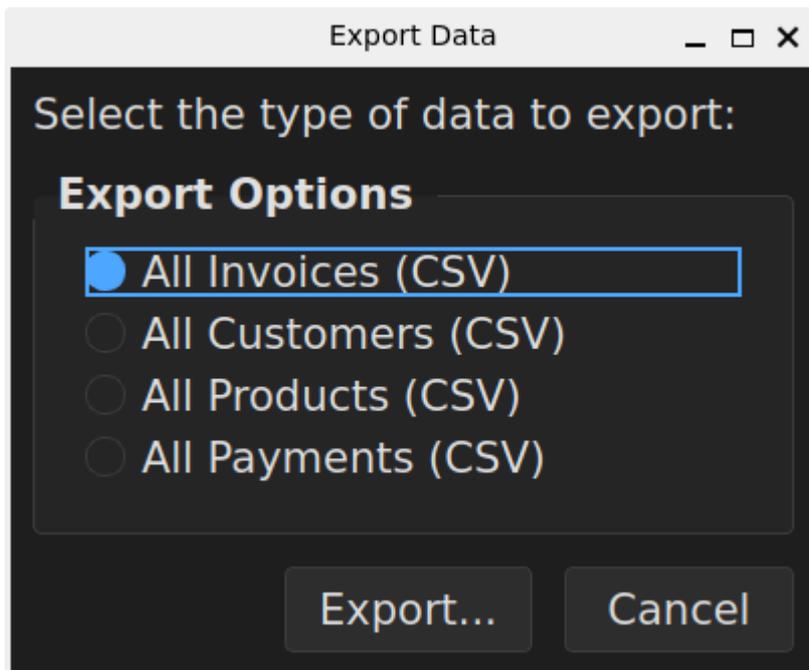
Export dialog with format and content options

To Export:

1. Go to **File > Export** or press **Ctrl+E**
2. Select what to export:
   - All Invoices
   - All Customers
   - All Products
   - All Payments
3. Choose destination folder
4. Click **Export**

Export Format: CSV (compatible with Excel and other spreadsheet applications)

11.2 Importing Data

Import data from external sources such as spreadsheets.
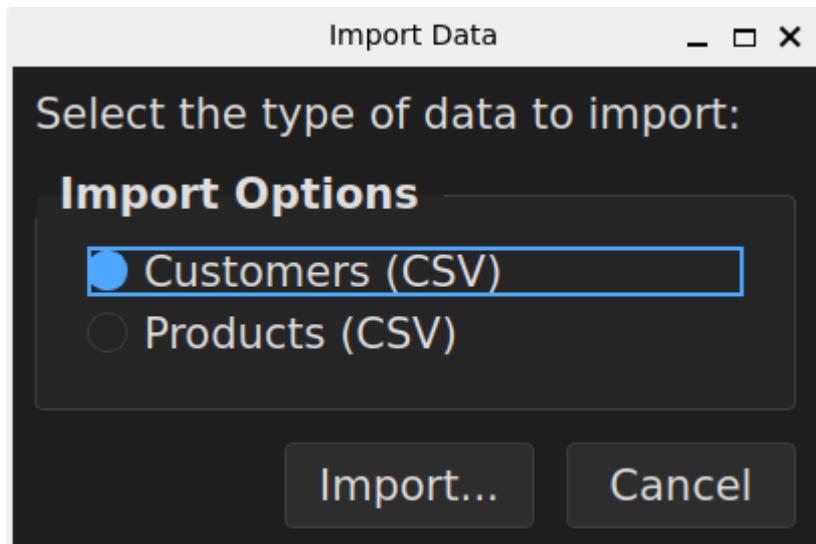
Import wizard with field mapping options

Supported Import Types:

- Customers (CSV)
- Products (CSV)

To Import:

1. Go to **File > Import** or press **Ctrl+I**
2. Select import type (Customers or Products)
3. Select your CSV file
4. Map columns to fields:
   - The wizard auto-detects common column names
   - Manually adjust mappings if needed
5. Choose import mode:
   - **Create Only**: Skip existing records (by email for customers, SKU for products)
   - **Update Only**: Only update existing records
   - **Create or Update**: Create new and update existing
6. Preview the import
7. Click **Import**

CSV Format Example (Customers):

```
name,email,phone,address_line1,city,state,postal_code,country
"Acme Corp","billing@acme.com","555-1234","123 Main St","Toronto","ON","M5V
2T6","Canada"
```

CSV Format Example (Products):

```
name,sku,price,description,category
"Consulting Hour","CONSULT-HR",150.00,"One hour of consulting","Services"
```

11.3 Backup and Restore

Creating a Backup:

1. Go to **File > Backup Database**
2. Choose where to save the backup file
3. Click **Save**

The backup is a complete copy of your database that can be restored if needed.

Automatic Backups:

Enable automatic backups in Settings > Preferences:

- Auto-backup on close: Creates backup when you exit the application
- Max Backups: Number of backup files to retain (older backups are deleted)

Restoring from Backup:

To restore your data from a backup, you must manually replace the database file:

1. Close the application
2. Navigate to your data folder:
    - Windows: `%USERPROFILE%\.invoice_app\`
    - macOS: `~/.invoice_app/`
    - Linux: `~/.invoice_app/`
3. Rename `invoice_app.db` to `invoice_app.db.old` (as a precaution)
4. Copy your backup file to this location
5. Rename the backup file to `invoice_app.db`
6. Restart the application

---

12. Help & Support

12.1 In-App Help

Press **F1** at any time to access the Help system.
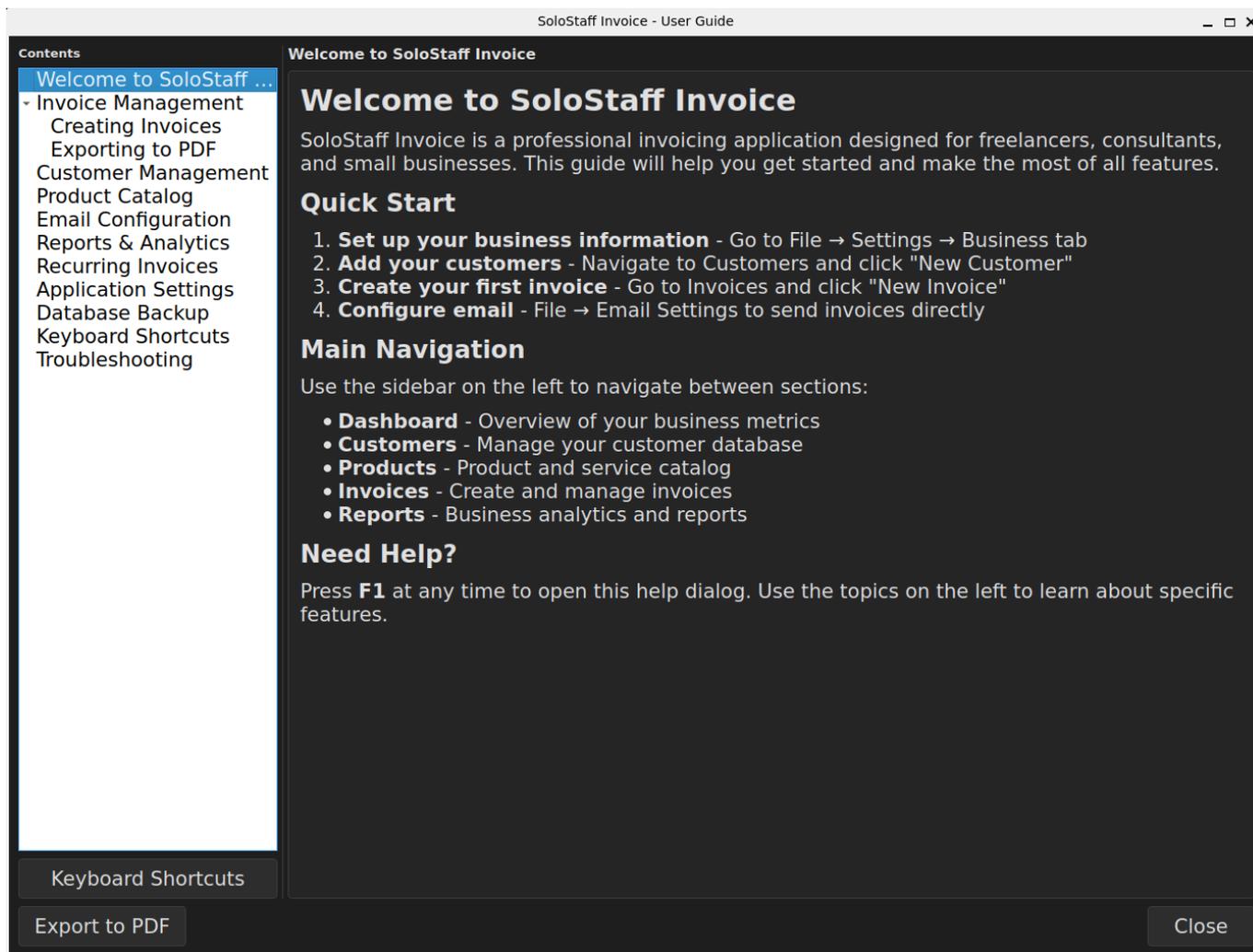
Built-in help with searchable topics and tutorials

The Help system includes:

- **Quick Start Guide**: Get started in minutes
- **Feature Guides**: Detailed explanations of each feature
- **Email Configuration**: Setup guides for Gmail, Outlook, Yahoo
- **Keyboard Shortcuts**: Complete shortcut reference
- **Troubleshooting**: Solutions to common problems
- **Database Backup**: How to protect your data

The help window can be moved and left open while you continue working with the main application window. This allows you to reference instructions while performing tasks.

You can also export the entire help system to PDF for offline reference.

12.2 Getting Help

Resource	How to Access
In-App Help	Press F1 or Help > User Guide
Keyboard Shortcuts	Help > Keyboard Shortcuts
About (Version Info)	Help > About

12.3 Reporting Issues

If you encounter a bug or issue:

1. Note the steps to reproduce the problem
2. Check the application version (Help > About)
3. Report the issue at: GitHub Issues

Include:

- Operating system and version
- Application version
- Steps to reproduce
- Error messages (if any)
- Screenshots (if helpful)

---

13. Keyboard Shortcuts

Create New Items

Shortcut	Action
Ctrl+N	New Invoice
Ctrl+Shift+C	New Customer
Ctrl+Shift+O	New Product

View Navigation

Shortcut	Action
Alt+1	Go to Dashboard
Alt+2	Go to Invoices
Alt+3	Go to Customers
Alt+4	Go to Products
Alt+5	Go to Recurring Invoices
Alt+6	Go to Reports
Ctrl+R	View Recurring Invoices

General

Shortcut	Action
Ctrl+,	Open Settings
Ctrl+E	Export Data

Shortcut	Action
Ctrl+I	Import Data
F5	Refresh Current View
Ctrl+Shift+T	Toggle Dark/Light Mode
F1	Open Help
Ctrl+Q	Quit Application

Edit Operations

Shortcut	Action
Ctrl+Z	Undo
Ctrl+Y	Redo
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+A	Select All

Dialog Navigation

Shortcut	Action
Esc	Close Dialog / Cancel

Table Navigation

Key	Action
Up/Down Arrow	Navigate rows
Enter	Open selected item
Home	First row
End	Last row
Page Up/Down	Scroll page

Dialog Navigation

Key	Action
Tab	Next field
Shift+Tab	Previous field

Key	Action
Enter	Activate default button
Space	Toggle checkbox
Escape	Close / Cancel

macOS Users: Replace **Ctrl** with **Cmd** for all shortcuts (e.g., Cmd+N, Cmd+S).

---

14. Troubleshooting

14.1 Application Won't Start

Windows:

- **SmartScreen warning**: Click "More info" then "Run anyway"
- **Missing DLL errors**: Ensure you extracted all files from the ZIP
- **Try running as administrator**: Right-click > Run as administrator

macOS:

- **Gatekeeper block**: System Preferences > Security & Privacy > Click "Open Anyway"
- **Damaged app message**: Right-click the app > Open > Click "Open"

Linux:

- **Permission denied**: Run `chmod +x SoloStaff_Invoice`
- **Missing libraries**: Install Qt dependencies:

```
# Ubuntu/Debian
sudo apt install libxcb-cursor0 libxcb-xinerama0

# Fedora
sudo dnf install xcb-util-cursor
```

14.2 Database Errors

Problem: "Database locked" or corruption errors

Solutions:

1. **Close other instances** - Only one instance should run at a time

2. **Check file permissions** - Ensure write access to the database folder

3. **Restore from backup**:

   - Close the application
   - Follow the restore procedure in Section 11.3

4. **Reset database** (loses all data):

    ○ Delete the database file (see Data Locations in Section 2)
    ○ Restart the application (creates new database)

14.3 Email Sending Fails

Problem: Emails don't send or show errors

Checklist:

1. **Did you configure email?** You must configure SMTP settings before sending emails (see Section 5.6)

2. **Test connection** - Go to Settings > Email > Test Connection

3. **Gmail users** - You must use an App Password:

    ○ Enable 2-Step Verification on your Google account
    ○ Generate App Password at App Passwords
    ○ Use the app password, not your regular password

4. **Check port** - Common ports: 587 (TLS), 465 (SSL)

5. **Enable TLS/STARTTLS** - Most providers require encryption

6. **Check firewall** - Ensure SMTP port is not blocked

14.4 PDF Generation Fails

Problem: PDFs don't generate or are blank

Solutions:

1. **Check disk space** - Ensure sufficient free space

2. **Check permissions** - Verify write access to output folder

3. **Try different location** - Save to Documents folder

4. **Check invoice data** - Ensure customer and line items are present

14.5 Display Issues

Problem: UI appears blurry, too small, or incorrectly scaled

Windows:

- Right-click executable > Properties > Compatibility
- Change high DPI settings > Override scaling behavior

Linux:

```
export QT_SCALE_FACTOR=1.5
./SoloStaff_Invoice
```

All Platforms:

- Adjust font size: Settings > Accessibility > Font Size

14.6 Slow Performance

Problem: Application is sluggish

Solutions:

1. **Large database** - Archive old invoices or export to CSV

2. **Check disk** - SSD recommended for database storage

3. **Close other applications** - Free up system memory

---

15. Appendix

A. Glossary

Term	Definition
Draft	An invoice that hasn't been finalized or sent
Issued	A finalized invoice sent to the customer
Line Item	A single product or service on an invoice
Recurring Invoice	An invoice generated automatically on a schedule
SKU	Stock Keeping Unit - unique product identifier
SMTP	Simple Mail Transfer Protocol - for sending emails
Void	A cancelled invoice that remains in records for audit
Soft Delete	Marking a record as inactive instead of permanently deleting

B. Data Locations by Platform

Windows:

Data	Location
Database	`%USERPROFILE%\.invoice_app\invoice_app.db`
Settings	`%APPDATA%\InvoiceApplication\config.json`
Backups	`%USERPROFILE%\.invoice_app\backups\`

macOS:

Data	Location

Data	Location
Database	`~/.invoice_app/invoice_app.db`
Settings	`~/Library/Application Support/InvoiceApplication/config.json`
Backups	`~/.invoice_app/backups/`

Linux:

Data	Location
Database	`~/.invoice_app/invoice_app.db`
Settings	`~/.config/invoice-application/config.json`
Backups	`~/.invoice_app/backups/`

C. CSV Import Field Mapping

Customers - Recognized Column Names:

- name, customer_name, company, company_name
- email, email_address, e-mail
- phone, phone_number, telephone
- address, address_line1, street, street_address
- city, town
- state, province, region
- postal_code, zip, zip_code, postcode
- country

Products - Recognized Column Names:

- name, product_name, item, item_name
- sku, product_code, item_code
- price, unit_price, cost
- description, desc
- category, type, product_type

D. Support Resources

- **Documentation**: This user manual
- **In-App Help**: Press F1
- **GitHub**: github.com/stephenbogner/invoice-app
- **Issues**: GitHub Issues

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