

Contents

Glossary - Agynamix Invoicer	3
1. Menu Bar	3
1.1 File Menu	3
1.2 Edit Menu	3
1.3 Help Menu	3
1.4 Tenant Selection	3
2. Sidebar Navigation	3
2.1 Dashboard	4
2.2 Documents	4
2.3 Timesheets	4
2.4 Tenants	4
2.5 Customers	4
2.6 Text Blocks	4
2.7 Settings	4
2.8 Show Log	4
3. Dashboard	4
3.1 Overview	4
3.2 Quick Actions	5
3.3 Statistics	5
4. Documents	5
4.1 Document List	5
4.2 Create/Edit Document	5
4.3 Document Actions	6
5. Tenants	6
5.1 Tenant List	6
5.2 Create/Edit Tenant	7
6. Customers	7
6.1 Customer List	7
6.2 Create/Edit Customer	8
7. Timesheets	8
7.1 Timesheet List	8
7.2 Create/Edit Timesheet	8
7.3 Timesheet Details	9
8. Text Blocks	9
8.1 Text Block List	9
8.2 Create/Edit Text Block	9
9. Settings	9
9.1 Appearance	9
9.2 Backup	9
9.3 Documents	10
9.4 Updates	10
Appendix	10
Keyboard Shortcuts	10

Database Location	10
Support and Documentation	11
Version Information	11

Glossary - Agynamix Invoicer

1. Menu Bar

1.1 File Menu

Create Backup - Create manual database backup - Choose storage location

Restore from Backup - Restore database from backup - All current data will be overwritten

Verify Audit Log - GoBD-compliant verification of transaction logs

Export Audit Log - Export audit log for external archiving

Import and Verify Export - Import and verify previously exported audit log

Exit - Close application

1.2 Edit Menu

Preferences - Opens settings area

1.3 Help Menu

Documentation - Opens online documentation in browser

Check for Updates - Checks for new program versions

Open Database Folder - Opens folder containing database file

Show Log - Displays application log

Start Tour - Starts guided tour through application

Delete Demo Data - Removes all demo data from database (only visible when demo data exists)

About - Shows version information and license

1.4 Tenant Selection

Dropdown in Menu Bar - Quick switching between tenants - Default tenant marked with star icon - Automatically filters all lists by selected tenant

2. Sidebar Navigation

Expand/Collapse Sidebar - Via menu icon ([=]) or arrow icon (<) - Shows icons and labels (expanded) or icons only (collapsed)

2.1 Dashboard

Icon: Dashboard symbol - Overview of all key metrics - Quick access to common actions

2.2 Documents

Icon: List symbol - Quotes, invoices, correction invoices, payment reminders - Filter functions - Create and edit

2.3 Timesheets

Icon: Clock symbol - Time tracking - Link to customers - Export as invoice possible

2.4 Tenants

Icon: Business symbol - Manage own company data - Invoice and quote number sequences - Logo and bank details

2.5 Customers

Icon: Person symbol - Customer management - Addresses and contact details - Link to documents

2.6 Text Blocks

Icon: Document symbol - Reusable text blocks - For invoices, quotes, etc.

2.7 Settings

Icon: Gear symbol - Application configuration - Backup settings - Document paths

2.8 Show Log

Icon: Document symbol - Application log - Error messages and system information

3. Dashboard

3.1 Overview

Statistic Cards - Open Invoices: Count and total amount - Due Payments: Overdue invoices - This Year: Revenue for current year - This Month: Rev-

enuer for current month - Open Quotes: Pending quotes - Due Quotes: Ex-pired quotes

3.2 Quick Actions

Welcome Area (when database is empty) - Create tenant - Create customer
- Create document - Restore backup - Load demo data

Click on Statistic Cards - Opens document list with corresponding filter

3.3 Statistics

Filterable Overview - By time period - By document type - By status

4. Documents

4.1 Document List

Toolbar Actions - Filter Button: Extended filter options - Create Button: New document (Quote/Invoice)

Filters - Text Search: By document number or customer name - Time Pe-riod: Year range (start/end year) - Document Types: Quote, Invoice, Correc-tion Invoice, Payment Reminder - Status: Draft, Published, Partially Paid, Fully Paid, Cancelled, etc. - Due Payments: Only overdue invoices - Due Quotes: Only expired quotes

Reset Filters - “Clear All Filters” in filter dropdown - Individual filter groups via X icons

Document Card (List View) - Document number and status badge - Cus-tomer - Date and due date - Amount - Edit button (pencil icon) - Preview button (eye icon) - Menu button ([::]) with additional actions

Menu Actions per Document - Edit: Open document - Duplicate: Create copy (only for published documents) - Export: PDF export - Preview: HTML/PDF preview - Show Log: Transaction history - Delete: Only for drafts

Document Status Colors - Gray: Draft - Light gray: Draft number - Yellow: Published - Light green: Accepted - Green: Paid - Red: Cancelled

4.2 Create/Edit Document

Header Area - Back button - Document type and number - Unsaved changes indicator

Document Type - Quote - Invoice

Select Customer - Dropdown with all customers - “New Customer” - opens customer form

Document Data - Document date - Due date / Validity (for quotes) - Currency (inherited from customer)

Line Items - Add Item: New line - Description, quantity, unit price, VAT rate - Delete button (X) per item - Automatic sum calculation

Text Blocks - Introduction: Before items - Conclusion: After items - Dropdown to select predefined text blocks - Markdown support

Attachments - Upload files - Saved with document

Footer Area - Close: Back to list - Log: Transaction history - Save: Save draft - Next Step: Context-dependent action

Next Step - Options - Publish: Finalize document and assign number - Create Invoice: From quote (after acceptance) - Quote Accepted: Change status - Quote Turned Down: Change status - Mark as Paid: Record payment - Create Reminder: Send payment reminder - Cancel: Cancel document (with/without correction invoice) - Mark as Deletable: Prerequisite for deletion - Delete: Remove permanently

4.3 Document Actions

Publish - Assigns permanent document number - Increments tenant's number sequence - Makes document immutable - Creates audit log entry

PDF Export - Automatic storage in configured document folder - Path pattern support (see Settings) - Opens exported file

Preview - HTML preview in draft - PDF preview after publication - Check before export

Duplicate - Creates copy with new draft number - Only for published documents - Copies all items and text blocks

Log - Shows all changes to document - GoBD-compliant tracking - Exported versions visible

5. Tenants

5.1 Tenant List

Toolbar - Create Button: New tenant

Tenant Card - Name and default icon (star) - Address - Phone - Invoice format (example with next number) - Set as Default button (star icon) - Edit button (pencil icon) - Delete button (trash icon)

Actions - Set as Default: Pre-selected at startup - Edit: Open tenant - Delete: Only possible when no linked documents exist

5.2 Create/Edit Tenant

Header Area - Back button - Title: “New Tenant” / “Edit Tenant”

Company Information - Company name (required) - Owner (optional) - Logo (upload image, max. 1 MB)

Address - Street (required) - Address line 2 (optional) - Postal code (required) - City (required) - State (optional) - Country (required)

Tax Data - Tax ID (required) - VAT ID (required)

Contact Details - Phone (required) - Email (required) - Website (optional)

Bank Details - Bank (required) - IBAN (required, validated) - BIC (required, validated) - Account holder (optional)

Invoice Settings - Invoice Number Pattern (required) - Parameters: {doc_no}, {year}, {month}, {day} - Examples: - INV-{doc_no} → INV-1 - INV-{year}-{doc_no} → INV-2025-1 - {year}{month}{day}-{doc_no} → 20251025-1 - Current Invoice Number (required) - Next invoice will use this number + 1

Quote Settings - Quote Number Pattern (required) - Parameters: {doc_no}, {year}, {month}, {day} - Examples: - Q-{doc_no} → Q-1 - Q-{year}-{doc_no} → Q-2025-1 - Current Quote Number (required)

Reminder Settings - Reminder Number Pattern (required) - Parameters: {doc_no}, {year}, {month}, {day} - Examples: - M-{doc_no} → M-1 - M-{year}-{doc_no} → M-2025-1 - Current Reminder Number (required)

Default Tenant - Checkbox: Set as default tenant - Pre-selected at startup

Actions - Cancel: Back to list (with change confirmation) - Save: Create/update tenant

6. Customers

6.1 Customer List

Toolbar - Filter Button: Extended filter options - Create Button: New customer

Filters - Text Search: By customer name - Due Payments: Only customers with overdue invoices

Customer Card - Name - Address - Email (if available) - Phone (if available) - VAT ID (if available) - Edit button (pencil icon) - Delete button (trash icon)

Actions - Edit: Open customer - Delete: Only possible when no linked documents exist

6.2 Create/Edit Customer

Header Area - Back button - Title: “New Customer” / “Edit Customer”

Customer Data - Company name (required) - Owner (optional)

Address - Street (required) - Address line 2 (optional) - Postal code (required) - City (required) - State (optional) - Country (required)

Contact Details - Email (optional) - Phone (optional)

Billing Data - VAT ID (optional) - VAT rate (required) - Currency (required) - Language (required): German / English - E-Invoice Type (required): ZUGFeRD / XRechnung / None

Actions - Cancel: Back to list (with change confirmation) - Save: Create/update customer

7. Timesheets

7.1 Timesheet List

Toolbar - Filter Button: Filter by customer - Create Button: New timesheet

Filters - Select Customer: Dropdown with all customers - Clear filter

Timesheet Card - Title - Period (From - To) - Customer - Total hours - Status (Draft/Invoiced) - View button (card clickable) - Edit button (pencil icon) - Delete button (trash icon)

Actions - View: Opens detail view - Edit: Opens form - Delete: Only possible for drafts

7.2 Create/Edit Timesheet

Header Area - Back button - Title: “New Timesheet” / “Edit Timesheet”

Timesheet Data - Title (required) - Customer (required, dropdown) - From Date (required) - To Date (required) - Notes (optional, markdown)

Entries Table - Date - Activity - Hours - Add Entry button - Delete entry (X per row) - Total hours display

Actions - Cancel: Back (with change confirmation) - Save: Save timesheet

7.3 Timesheet Details

Header Area - Back button - Title - Edit button

Display - Customer - Period - Notes - Entries table (Date, Activity, Hours) - Total hours

Actions - Edit: Opens form - Create as Invoice: Converts timesheet to invoice - Back: To list

8. Text Blocks

8.1 Text Block List

Toolbar - Create Button: New text block

Text Block Card - Title - Category - Text preview (first lines) - Edit button (pencil icon) - Delete button (trash icon)

Actions - Edit: Open text block - Delete: Remove text block

8.2 Create/Edit Text Block

Header Area - Back button - Title: “New Text Block” / “Edit Text Block”

Text Block Data - Title (required) - Category (dropdown): Introduction, Conclusion - Text (required, Markdown editor)

Markdown Support - Bold: **Text** - Italic: *Text* - Headings: # H1, ## H2, ### H3 - Lists: - Bullet, 1. Numbered - Links: [Text] (URL)

Actions - Cancel: Back to list (with change confirmation) - Save: Create/update text block

9. Settings

9.1 Appearance

Theme - System Default: Follows operating system setting - Dark Mode: Always dark mode - Light Mode: Always light mode

Clear Cache - Deletes temporary data and preview images

9.2 Backup

Frequency - None: No automatic backups - Always: On every exit - Daily: Once per day - Weekly: Once per week - Monthly: Once per month

Backup Directory - Choose Directory button - Display path - Clear path (X)

Retention Period - Keep: Indefinitely - 1 Day: Delete after one day - 1 Week: Delete after one week - 1 Month: Delete after one month - 1 Year: Delete after one year

Note - Backups are created automatically when closing - Storage location must be configured before first backup

9.3 Documents

Document Root - Main folder for all generated documents - Choose Directory button - Clear path (X)

Document Name Pattern (optional) - Leave empty: All documents in main folder - With pattern: Automatic subfolder structure

Available Parameters - `{tenant}`: Tenant name - `{customer}`: Customer name - `{year}`: Year (YYYY) - `{month}`: Month (MM) - `{day}`: Day (DD) - `{date}`: Date (YYYYMMDD) - `{document_type}`: Document type (e.g., Invoice, Quote) - `{document_number}`: Document number

Examples - `{year}/{customer}/{document_type}_{document_number}` - Result: 2025/Example Company Ltd/Invoice_INV-2025-42.pdf - `{year}/{month}/{document_type}` - Result: 2025/11/Invoice/INV-2025-42.pdf - `{tenant}/{year}` - Result: MyCompany/2025/INV-2025-42.pdf

Notes - Path separators (/ or \) are automatically converted - Invalid characters (<>: " | ?*) are removed or replaced - Spaces are replaced with _

9.4 Updates

Automatically Check for Updates - Checkbox: Check for new versions at program startup

Appendix

Keyboard Shortcuts

No special keyboard shortcuts defined. Navigation via mouse/trackpad.

Database Location

Development/Standard - macOS/Linux: `~/.config/agynamix-invoicer/invoicer_db.db` - Windows: `%APPDATA%\agynamix-invoicer\invoicer_db.db`

Support and Documentation

Website: <https://www.agynamix.de> **Online Documentation:** Via Help
Menu → Documentation

Version Information

This documentation refers to Agynamix Invoicer version 1.0.0 and higher.