

## 1. Create Profile

This screen allows users to create or edit their organization profile. It includes fields for company details such as name, email, phone, and address.

**Create Profile**

**Organization Image**

**Contact Info**

Name  
Company name

Email  
companyemail@gmail.com

Phone Number  
0000000000

**Tax Info**

PAN No  
Company pan no

GST No  
Company GST no

**Payment Info**

Bank Name  
Bank name

Account Holder Name  
Account holder name

Account Number  
Account number

IFSC Code  
IFSC cose

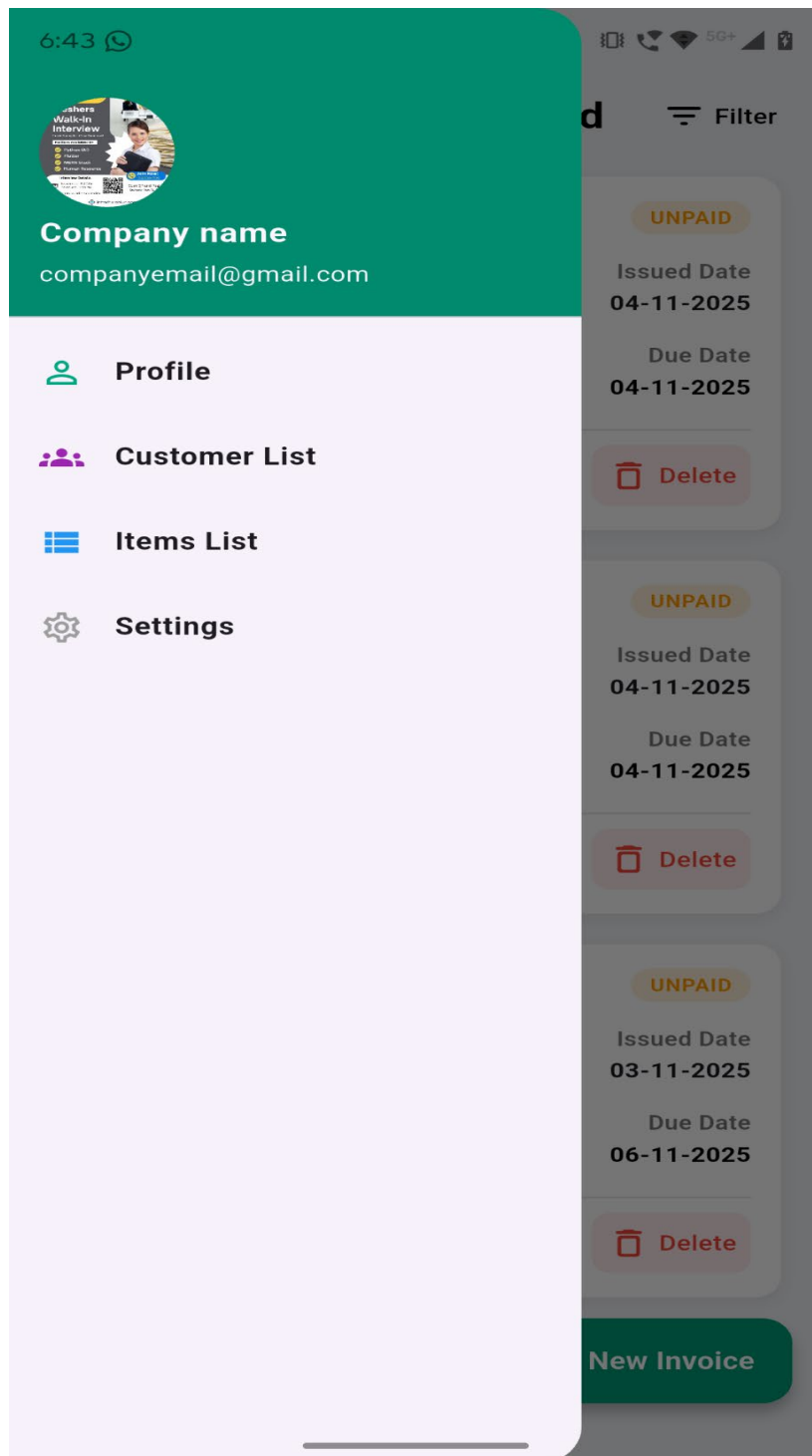
UPI ID  
UPI id

**Save** **Cancel**

- Organization Image – Upload your company logo or image.
- Contact Info – Enter company name, email, and phone number.
- Address Info – Add address details like street, city, state, and country.
- Save/Cancel – Save changes or cancel profile creation.

## 2. Navigation Drawer

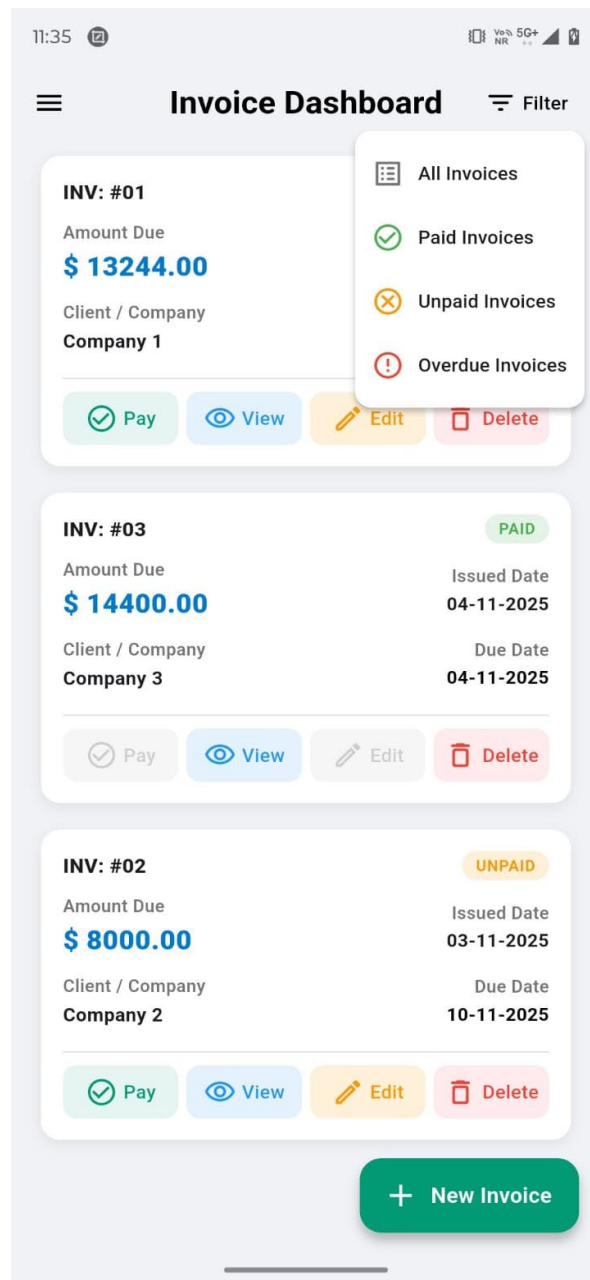
The drawer provides quick navigation options to access major sections of the app such as Profile, Customer List, Items List, and Settings.



- Profile – View or edit company profile.
- Customer List – Access saved customer details.
- Items List – Manage items available for invoices.
- Settings – Configure app preferences.

### 3. Invoice Dashboard

This screen displays all the created invoices with their details and status. Users can filter, view, edit, pay, or delete invoices easily from here.



- Invoice Cards – Show each invoice with number, amount, client, and due dates.
- Status – Shows whether the invoice is PAID or UNPAID.
- Action Buttons –
  - Pay: Mark invoice as paid.
  - View: Open invoice details.
  - Edit: Modify invoice.
  - Delete: Remove invoice.
- New Invoice Button – Create a new invoice.

## 4. Create New Invoice

This screen allows editing an existing invoice with customer, company, and invoice details.

The screenshot shows the 'Create Invoice' screen in a mobile application. The screen is divided into several sections, each with a header and a list of fields. Red dotted lines with numbers 1 through 16 point to specific elements on the screen.

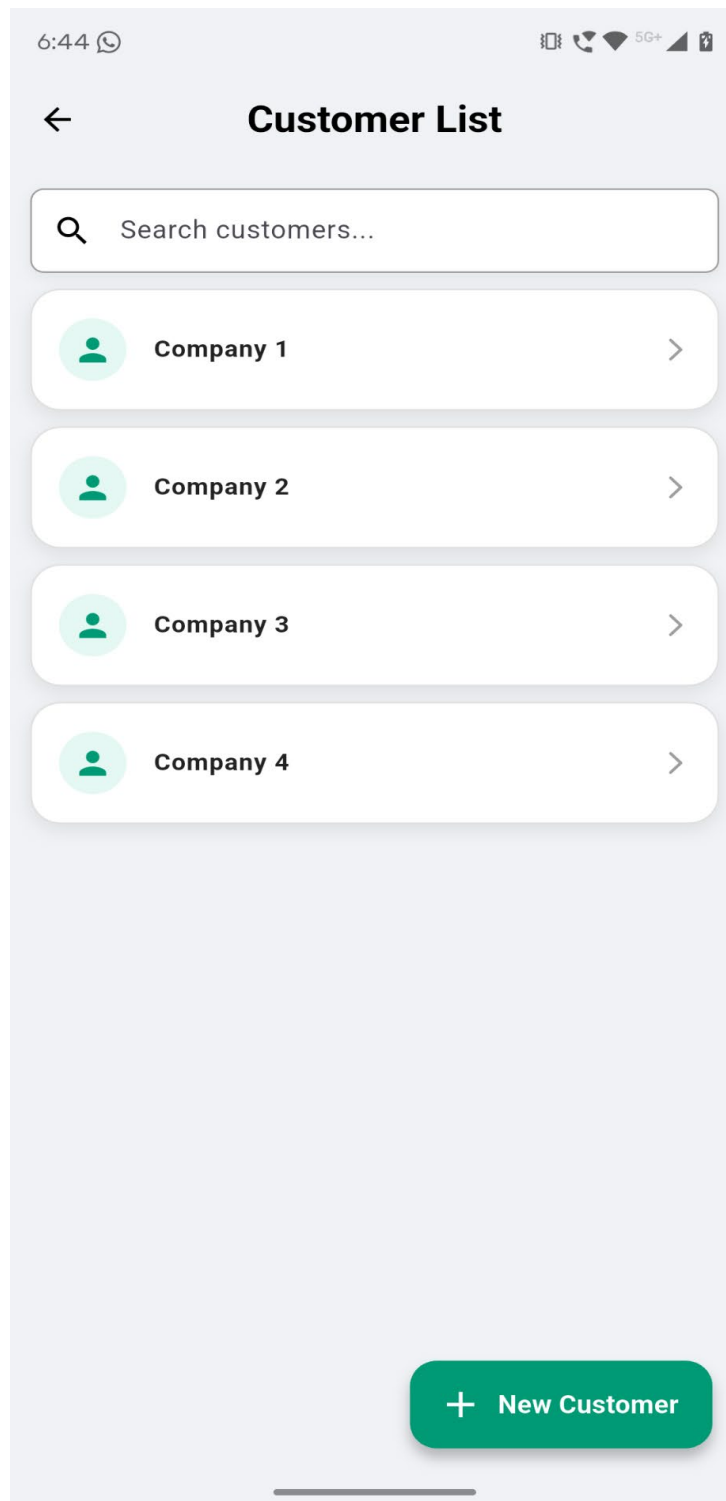
- 1: Invoice No. field (value: #04)
- 2: PO Number field
- 3: Company name field (value: Company name, Company area, Company city, Company state, Company country, companyemail@gmail.com, 0000000000)
- 4: Select Customer dropdown
- 5: Ship To (Optional) field
- 6: Invoice Date field (with calendar icon)
- 7: Due Date field (with calendar icon)
- 8: Select Currency dropdown
- 9: Select And Type dropdown (value: Product)
- 10: Qty field (value: 1)
- 11: Add Line Item button
- 12: + Discount button
- 13: Subtotal field (value: \$ 0.00)
- 14: + Tax button
- 15: Additional Information section (Notes and Terms fields)
- 16: Save Invoice button

The screen also includes a 'Customer Details' section with a 'Bill To' field, a 'Dates' section, and a 'Summary' section with a 'Total' field (value: \$ 0.00).

1. **Invoice No** – Auto generate invoice number.
2. **PO Number** – Add the purchase order number (optional).
3. **Company Info** – Add or default show your company's name, address, and contact details.
4. **Select Customer** – Choose the customer to whom this invoice will be billed.
5. **Ship To** – Add the shipping or delivery address (optional).
6. **Invoice Date** – Set the date when the invoice is created.
7. **Due Date** – Select the due date for payment.
8. **Select Currency** – Choose the preferred currency for this invoice.
9. **Close Icon (X)** – Remove an unwanted product or item line.
10. **Dropdown (▼)** – Select a product or service from the available list.
11. **Add Line Item** – Add new products or services to the invoice.
12. **Discount** – Apply a discount to the total invoice amount.
13. **Tax** – Add tax details (percentage or amount).
14. **Shipping** – Include shipping or delivery charges.
15. **Additional Information** – Enter extra notes or terms and conditions.
16. **Save Invoice** – Save and generate the invoice after filling all details.

## 5. Customer List

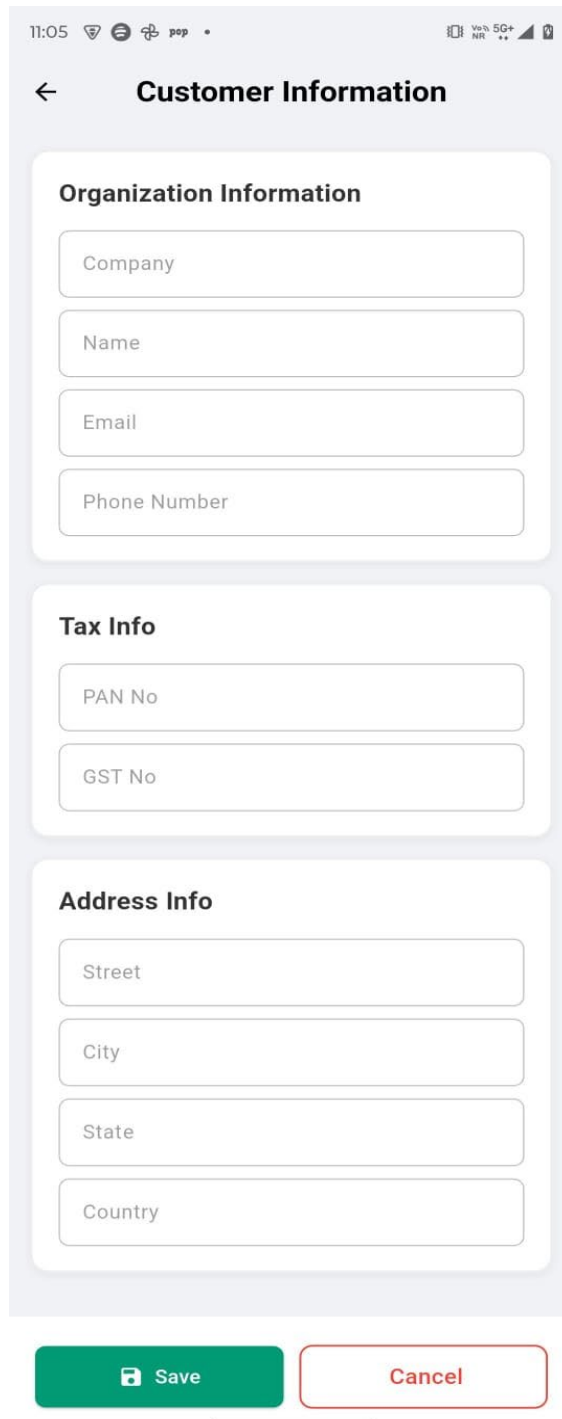
This screen displays a list of all customers saved in the system. You can search for customers or add new ones using the 'New Customer' button.



- Search Bar – Quickly find a customer by name.
- Customer Cards – Display customer name and organization.
- New Customer Button – Add a new customer entry.

## 6. Customer Information

This screen is used to add or edit customer details. It includes organization, tax, and address information sections.



The screenshot shows a mobile application interface for "Customer Information". At the top, there is a status bar with the time 11:05 and various icons. Below the status bar is a header with a back arrow and the title "Customer Information". The form is divided into three main sections: "Organization Information", "Tax Info", and "Address Info". Each section contains several input fields. At the bottom of the form, there are two buttons: a green "Save" button and a red "Cancel" button.

**Organization Information**

Company

Name

Email

Phone Number

**Tax Info**

PAN No

GST No

**Address Info**

Street

City

State

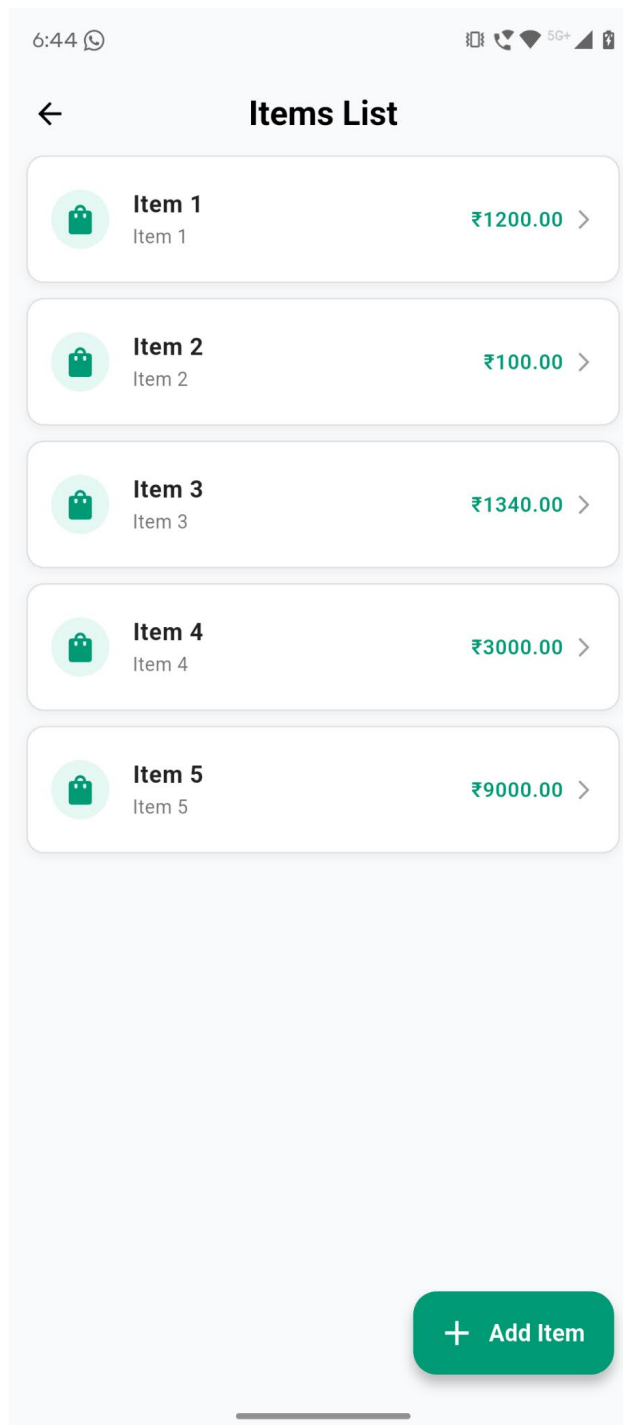
Country

**Save** **Cancel**

- Organization Information – Add company name, contact name, email, and phone number.
- Tax Info – Add PAN and GST numbers.
- Address Info – Include Street, city, state, and country.
- Save/Cancel – Save or discard changes.

## 7. Items List

This screen lists all the items that can be added to invoices. Each item shows its name and price.



- Item Cards – Show item name and rate.
- Add Item Button – Opens Add Item screen to create new items.



## 8. Add Item

This screen allows adding a new item to be used in invoices. The user can define title, details, and price of the product.

6:44

← Add Item

**Title**

Title

Details

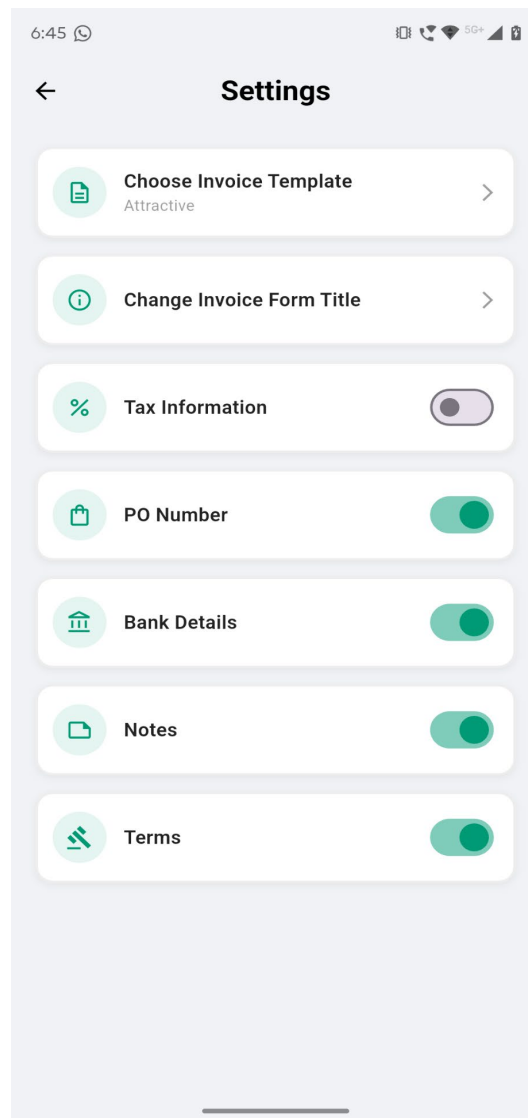
Prices

Save Cancel

- Title – Enter the name of the item.
- Details – Add description for the product.
- Prices – Enter price per unit.
- Save/Cancel – Save item or cancel creation.

## 9. Settings

The settings page allows users to customize invoice templates and app preferences.



- Choose Invoice Template – Select from available invoice templates.
- Change Invoice Form Title – This option allows you to change or customize the field titles (like Product, Quantity, Rate, etc.) that appear in your invoice form. The titles you set here will only be shown inside your generated invoices — they will not change anywhere else in the app.

Example:

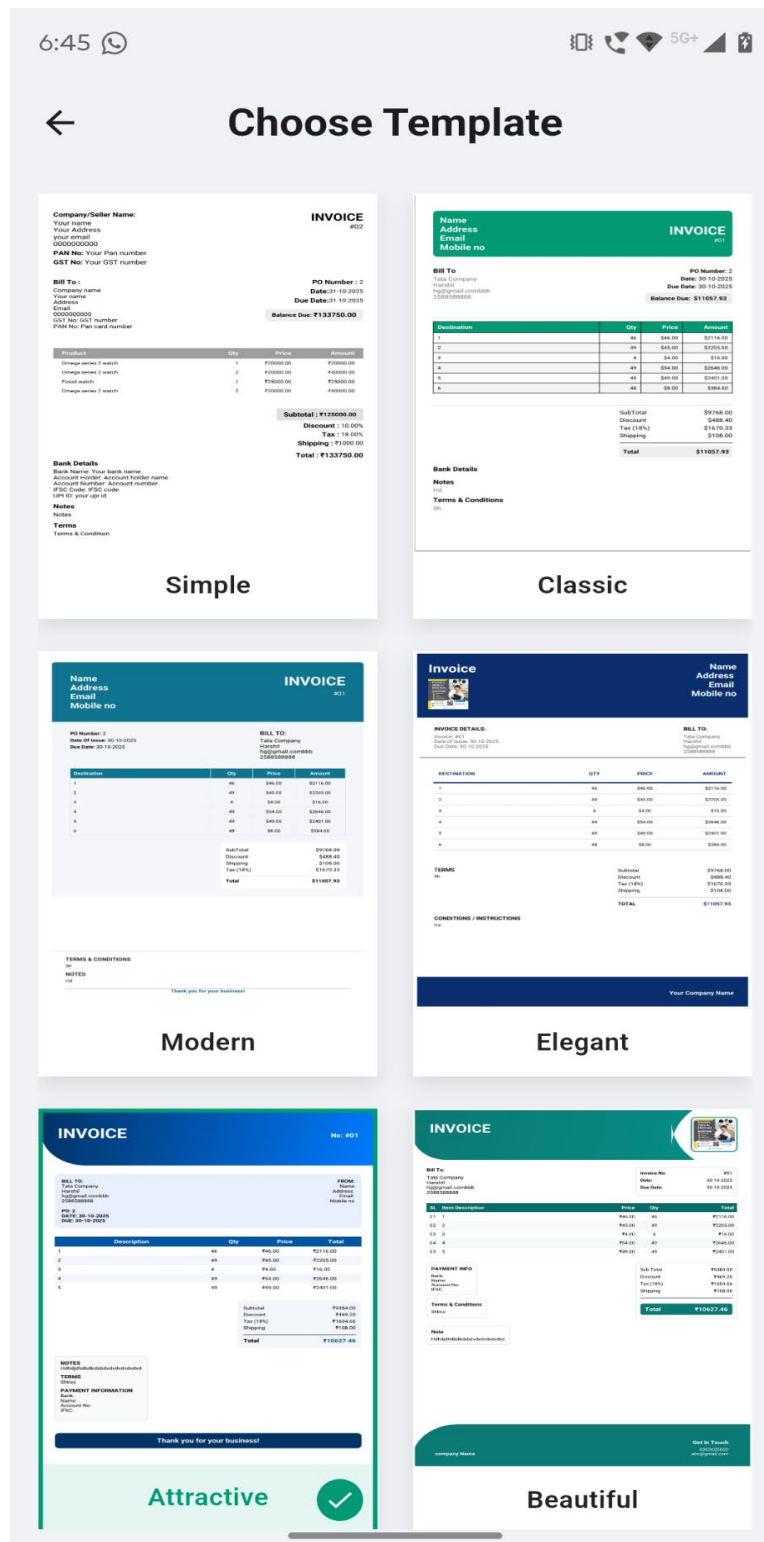
- Change “Product” → “Item Name”
- Change “Qty” → “Number of Units”
- Change “Price” → “Rate per Unit”

This helps make your invoices look more personalized and professional according to your business style.

- Toggle Options – Enable or disable Tax Info, PO Number, Bank Details, Notes, and Terms.

## 10. Choose Template

This screen provides multiple professional invoice designs for users to choose from.



- Template Grid – Shows all available invoice designs such as Simple, Classic, Modern, Elegant, Attractive, and Beautiful.
- Preview – Displays layout before applying the template.

## 11. Item Titles

This screen allows customizing item field titles used in the invoice form.

6:45

← **Item Titles**

Description Title  
Product

Quantity Title  
Qty

Rate Title  
Price

Save Title

- Description Title – Change label for product description.
- Quantity Title – Customize the quantity field title.
- Rate Title – Change the rate or price field title.
- Save Title – Save customized field names.