

What this tool does

- Excel invoice templates with **automatically generated invoice numbers**
 - One-click invoice summary generation to help you **track payments**
 - All files stay on your computer — **no internet required, no data upload**
-

⚠ First-time setup (IMPORTANT)

This only needs to be done once.

1. Use a local folder

For best stability:

- Use a **local folder** on your computer
- **Do not** use OneDrive, Dropbox, or other cloud-synced folders
- **Do not** move subfolders or change folder names

Cloud auto-save may interfere with Excel macros and file updates.

Changes to the folder structure may cause macro errors.

2. Unlock the file and enable macros

Unzip the downloaded folder (do not open files directly from the zip file) first.

When opening the Excel files:

- Right-click the file → **Properties** → tick **Unblock** (if shown)
- Open the file and click **Enable Editing**
- Then click **Enable Content / Enable Macros**

This is a standard Microsoft Excel security warning for all macro-enabled files.

Macros in this tool are used **only for invoice numbering and button actions**.

Daily use

- Create invoices using the templates (PDF files are saved to the *Invoices* folder)
- For multiple invoices, click **Next Invoice** before generating a new invoice.
Invoices with same invoice number will overwrite the previous file.
- Click **Update Summary** to pull new invoices into the invoice summary
- Update the **Payment Received** column to track payments
- Click **Update Summary** regularly to keep data up to date