

UI Design Document for Invoice & Billing App

Date: 25-06-1025

Version: 1.0

Purpose of the UI

The purpose of the UI for the Invoice and Billing App is to provide a simple, intuitive, and responsive interface that allows users to:

- Generate and manage invoices easily
- Add customer and product/service details
- Calculate totals with tax and discounts
- View and download billing reports
- Edit or delete existing invoices
- Other useful features implemented in the UI to enhance usability and user experience

This UI aims to streamline the invoice creation process and reduce manual effort and errors, while maintaining a professional look for business transactions.

Technologies used:

React+vite, Tailwind CSS

UI Theme & Design Language :

Primary Color #3A6F48 (Deep Green)

Secondary Color #8B5A2B (Earthy Brown)

Accent Color #F4C842 (Soft Gold)

Background Color #FAF9F5 (Off-White)

Fonts Lato/Roboto, Playfair Display/Poppins

UI Overview

1)Admin Dashboard Page

Purpose

The Admin Dashboard provides a quick, high-level overview of important billing and business metrics. It helps the admin monitor daily performance, track revenue, manage pending tasks, and stay updated on inventory and schedule — all from one centralized view.

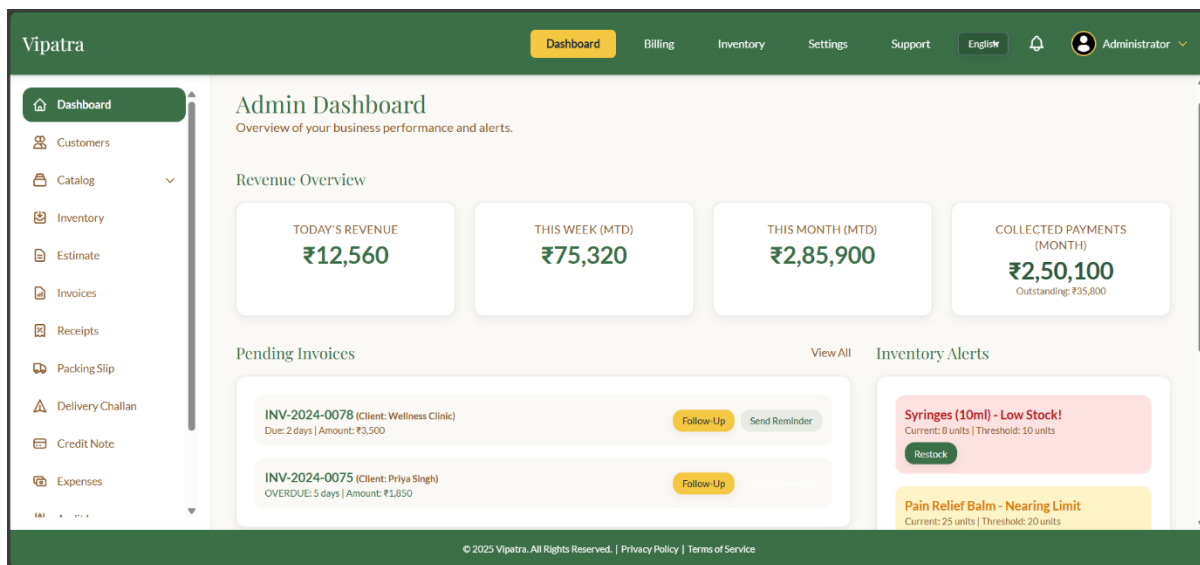


Fig 1.1. Admin Dashboard with revenue overview and pending invoices

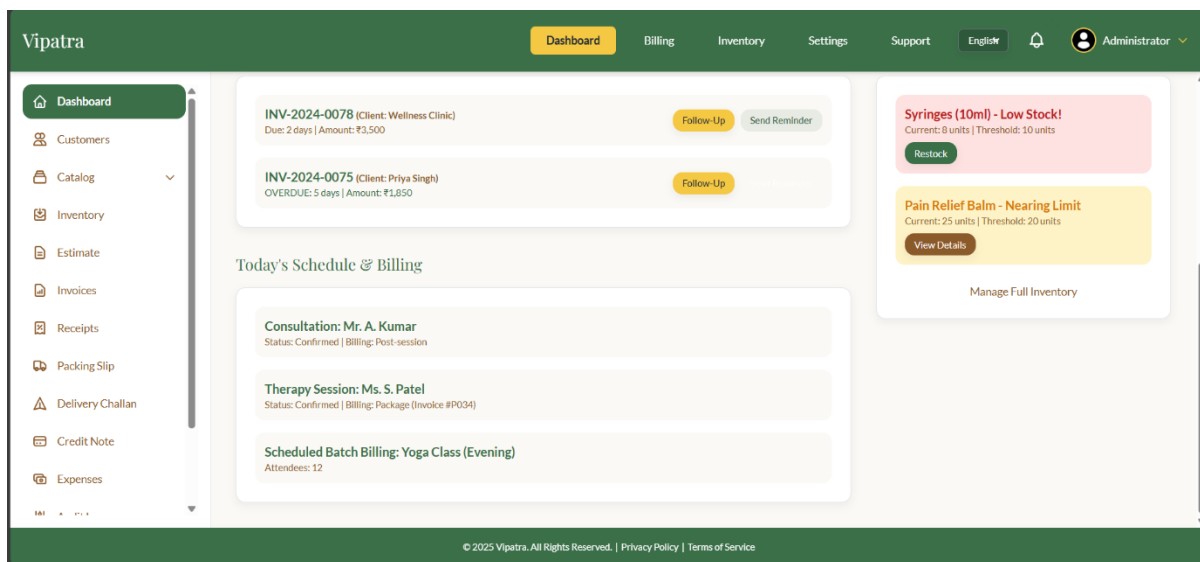


Fig 1.2. Admin Dashboard with Today's Schedule & billing and Inventory alerts

2)Customers Page

Purpose

The Customers section allows the admin or billing personnel to view, manage, and add customer records. It ensures customer details are organized and readily accessible for invoicing and reporting purposes

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DashboardBillingInventorySettingsSupportEnglishAdministrator

DashboardCustomersCatalogInventoryEstimateInvoicesReceiptsPacking SlipDelivery ChallanCredit NoteExpenses

All Customers

+ New

Customer Name	Company	Email	Phone	Outstanding (₹)	Status	Actions
Tech Solutions Inc.	Tech Solutions	contact@techsolio	+91 8877665544	₹25,000	Active	
Modern Apparel	Modern Apparel	support@modernapparel.com	+91 7766554433	₹0.00	Active	
City Bakers	City Bakers	orders@citybakers.com	+91 9876512345	₹1,500	Active	
Quantum Innovations	Quantum	hello@quantum.dev	+91 8765432109	₹55,000	Active	
Coastal Exporters	Coastal	exports@coastal.in	+91 7654321098	₹1,12,000	Active	
Sunrise Hotels	Sunrise Group	bookings@sunrise.com	+91 6543210987	₹0.00	Active	

Showing 1 to 14 of 14 invoices

localhost:5173/customers/6

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Fig 2.1. List of customers with details

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DashboardCustomersCatalogInventoryEstimateInvoicesReceiptsPacking SlipDelivery ChallanCredit NoteExpenses

New Customer

Prefill Customer details using GSTIN

Enter 15-digit GSTIN

Prefill

Customer Type

☒ Business ☐ Individual

Primary Contact

Salutation

Mr.

First NameLast Name

Company NameDisplay Name

Select or type to add

Email AddressCurrency

localhost:5173/customers/6

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Fig 2.2. New Customer create page

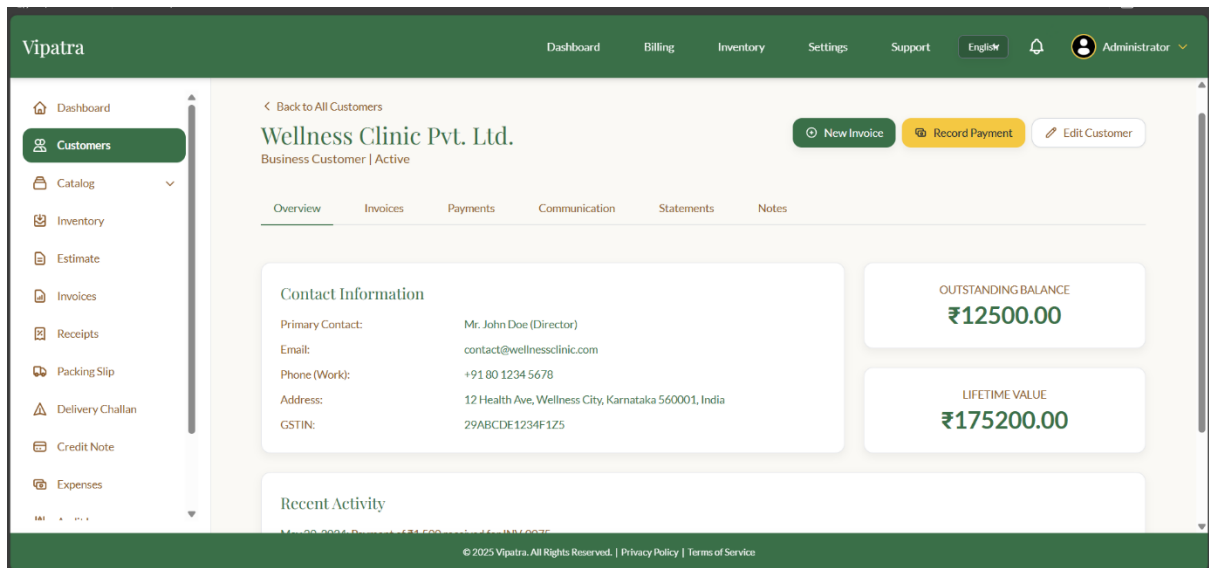


Fig 2.3. Customer details page

3)Items Page

Purpose

The Items (or Products) page allows the admin to manage the products or services offered by the business. It helps maintain inventory, pricing, and tax details, which are later used during invoice generation.

ITEM NAME	ITEM CODE	TYPE	STOCK	PRICE	ACTIONS
Wireless Ergonomic Mouse	PROD-MS-001	Product	150 pcs	₹2,499.00	
Mechanical Keyboard (RGB)	PROD-KB-002	Product	85 pcs	₹5,999.00	
Website Design Consultation	SERV-CONS-001	Service	N/A	₹4,500.00	
Cloud Setup Service	SERV-CLOUD-002	Service	N/A	₹25,000.00	
4K Monitor 27-inch	PROD-MON-004	Product	45 pcs	₹28,000.00	
Annual Maintenance Contract	SERV-AMC-003	Service	N/A	₹1,50,000.00	

Fig 3.1.List of items

Item Type

Product Service

Main Details

Item Name *

Unit pcs Item Code / SKU

Fig 3.2. Create new item

4)Inventory Management Dashboard

Purpose

The Inventory Management Dashboard provides a real-time overview of stock-related metrics to help ensure optimal inventory levels. It highlights critical items, enables batch tracking with expiry alerts, and lists detailed information about low stock items. This helps prevent stockouts, supports timely restocking, and ensures efficient inventory control.

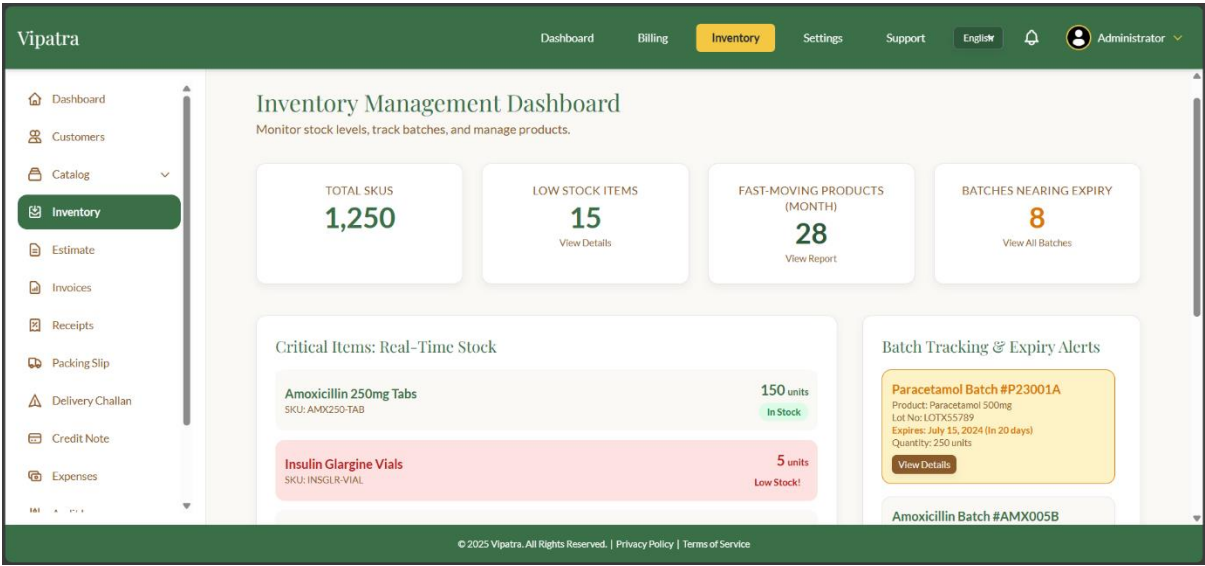


Fig 4.1.Inventory Dashboard

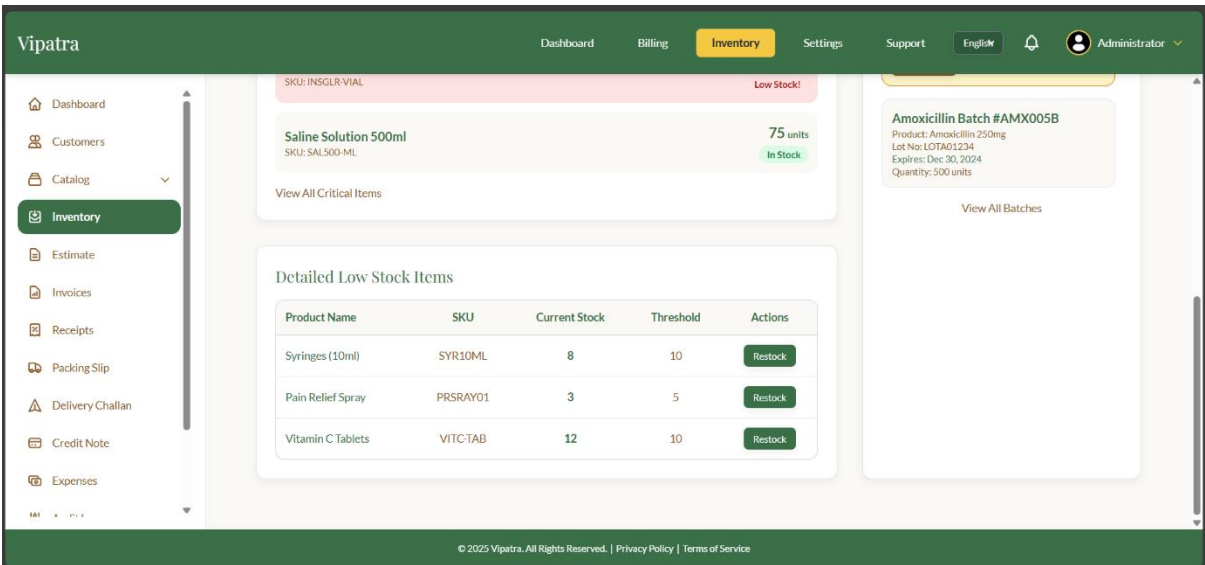


Fig 4.2. Inventory Dashboard

5)Estimate Page

Purpose

The Estimates section allows users to manage quotations or price estimates before converting them into final invoices. The Estimate List page displays all generated estimates for reference or follow-up, while the Create Estimate page enables the creation of new estimates by specifying customer details, items, pricing, and terms. This helps streamline pre-billing communication and improves transparency with clients.

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All Estimates

+ New?

Date	Estimate #	Customer Name	Status	Amount	Actions
2023-10-25	QT-00001	Sunshine Corp	Sent	₹15000.00	
2023-10-22	QT-00002	BlueWave Technologies Inc.	Draft	₹8500.50	
2023-10-21	QT-00003	GreenScape Gardens & Landscaping	Approved	₹22000.00	
2023-10-20	QT-00004	Quantum Innovations Ltd.	Sent	₹45000.00	
2023-10-18	QT-00005	City Bakers & Confectionery	Rejected	₹3200.00	
2023-10-15	QT-00006	Modern Apparel & Fashion House	Sent	₹12500.00	

Showing 1 to 12 of 12 estimates

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Fig 5.1. Estimate list

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New Quote

Customer & Quote Info

Customer Name

Select or Add Customer

Quote #QT-000001

Reference #

Quote Date25-06-2025

Expiry Datedd-mm-yyyy

SalespersonSelect Salesperson

Project NameEnter project name

SubjectLet your customer know what this Quote is for

Select a customer to associate a project.

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Fig 5.2. New Estimate create form

6)Invoice Page

Purpose

The Invoices section serves as the core of the billing system. The Invoice List page provides an organized view of all generated invoices, their statuses, and relevant actions. The Create Invoice page allows users to generate professional invoices by selecting customers, adding items, applying taxes or discounts, and setting payment terms. This ensures accurate billing, proper record-keeping, and smooth financial transactions between the business and its clients.

Issue Date	Invoice #	Customer Name	Due Date	Status	Amount	Actions
May 10, 2024	INV-2024-0078	Wellness Clinic Pvt. Ltd.	May 25, 2024	Partially Paid	₹3500.00	
May 08, 2024	INV-2024-0077	Rohan Sharma	May 23, 2024	Paid	₹1200.00	
May 05, 2024	INV-2024-0076	Priya Singh & Associates	May 12, 2024	Overdue	₹850.00	
May 01, 2024	INV-2024-0075	Tech Solutions Inc.	May 16, 2024	Sent	₹12600.00	
Apr 28, 2024	INV-2024-0074	GreenScape Gardens	May 13, 2024	Draft	₹4200.00	
Apr 25, 2024	INV-2024-0073	Modern Apparel & Fashion House	May 10, 2024	Paid	₹7800.00	

Fig 6.1. List of Invoices

Create New Invoice

Invoice & Customer Details

Invoice For: -- Choose type --

Invoice Date: 25-06-2025

Search Existing (Auto-complete)

Start typing name, phone, or email...

Add New Details: ▾

invoiceCreate.step3.title

Search or type: 1 0.00 Tax % 30.00

Fig 6.2. New Invoice create form

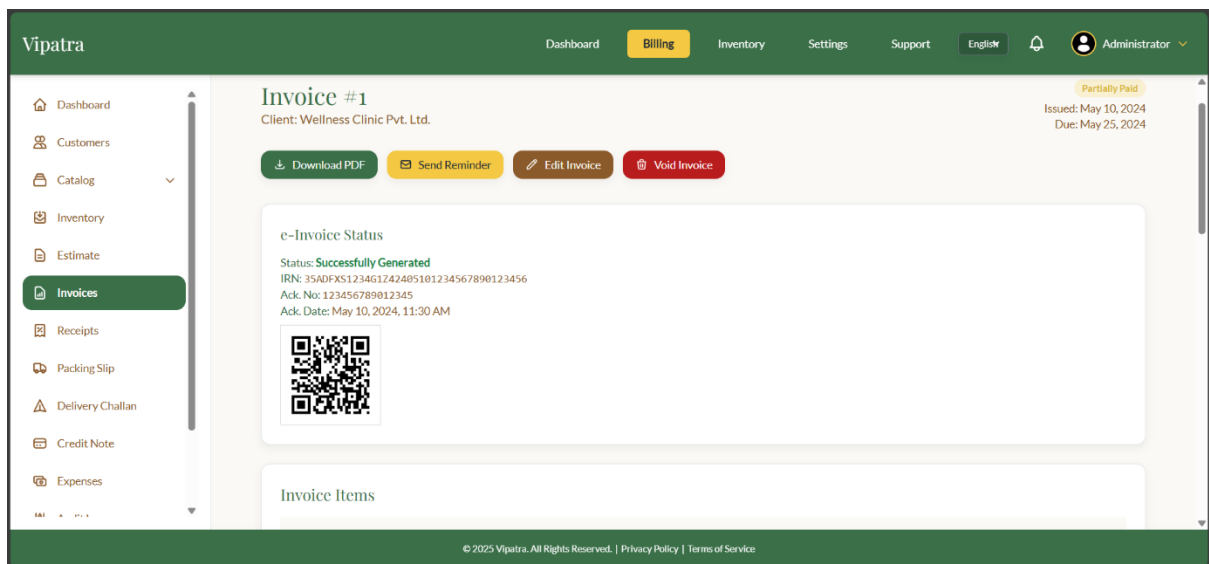


Fig 6.3. Invoice Details page

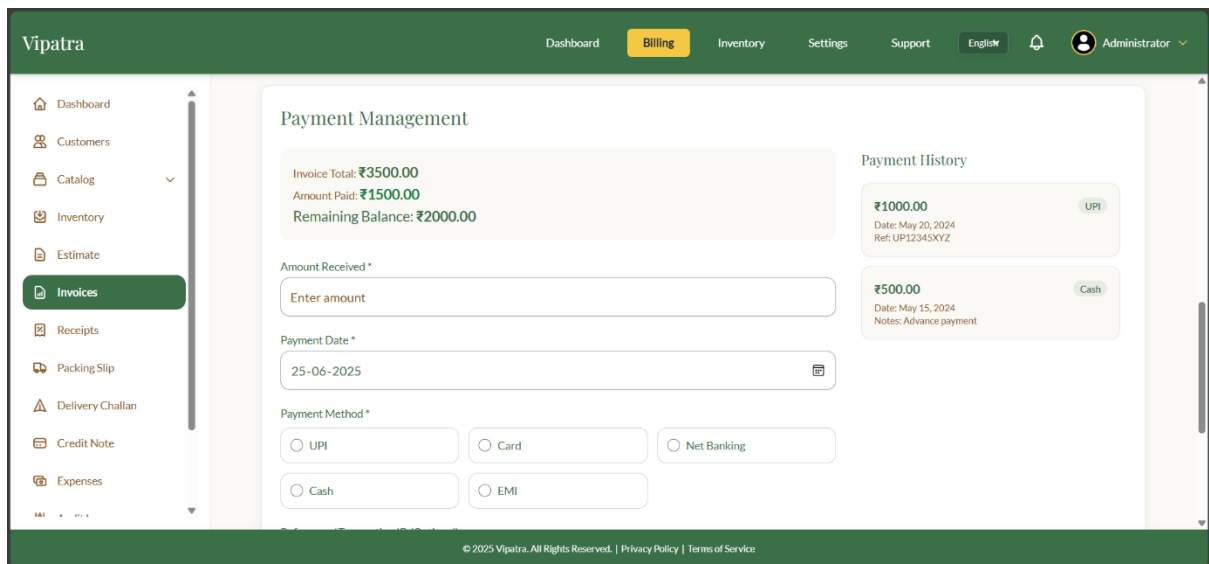


Fig 6.4. Payment Management and payment history for an invoice

7)Payment Receipts Page

Purpose

The Payment Receipts section allows tracking and recording of payments received against invoices. The Receipts List page displays all recorded payments, along with details like customer name, invoice number, actions, amount received, and date. The Create Receipt page enables users to log a new payment by selecting the related invoice, entering payment details, and updating the payment status. This helps maintain accurate financial records and ensures clarity in the payment lifecycle.

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Payments Received

+ New

Date	Receipt #	Customer Name	Invoice #	Amount	Actions
2024-05-15	RCPT-105	Wellness Clinic Pvt. Ltd.	INV-2024-0078	₹1500.00	
2024-05-10	RCPT-104	Rohan Sharma	INV-2024-0077	₹1200.00	
2024-05-14	RCPT-103	Priya Singh & Associates	INV-2024-0076	₹850.00	
2024-05-12	RCPT-102	Tech Solutions Inc.	INV-2024-0075	₹12600.00	
2024-05-11	RCPT-101	GreenScape Gardens	INV-2024-0074	₹4200.00	
2024-05-09	RCPT-100	Modern Apparel & Fashion	INV-2024-0073	₹7800.00	

Showing 1 to 10 of 10 payments

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Fig 7.1. List of Payments Received

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DashboardCustomersCatalogInventoryEstimateInvoicesReceiptsPacking SlipDelivery ChallanCredit NoteExpenses

Create Payment Receipt

Receipt Information

Receipt No.

Auto-generated or Enter

Payment Date *

25-06-2025

Received From (Customer/Payer)

Name *

Phone (Optional)

Address (Optional)

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Fig 7.2. Create new Receipt form

8)Packing slip page

Purpose

The Packing Slip section is used to generate and manage packing slips for orders. It helps document the items being shipped, their quantities, and customer details. This ensures accurate order fulfillment and acts as a reference for both the business and the customer during delivery.

Date	Packing Slip #	Invoice #	Customer Name	Actions
2024-05-11	PS-0012	INV-2024-0078	Wellness Clinic Pvt. Ltd.	
2024-05-02	PS-0011	INV-2024-0075	Tech Solutions Inc.	
2024-04-29	PS-0010	INV-2024-0074	GreenScape Gardens & Landscaping	
2024-04-26	PS-0009	INV-2024-0073	Modern Apparel & Fashion House	
2024-04-23	PS-0008	INV-2024-0072	Coastal Exporters International	
2024-04-21	PS-0007	INV-2024-0071	Phoenix Digital Solutions	

Showing 1 to 10 of 10 packing slips

Fig 8.1. List of Packing slip list

Create Packing Slip

Based on Invoice # (Optional)

Enter Invoice No. to load items Load Items

Customer Name *

Packing Slip No. Auto-generated or Enter

Shipping Address *

Enter full shipping address

Shipping Date *

25-06-2025

Fig 8.2. Create new Packing slip form

9) Delivery challan

Purpose

The Delivery Challan section allows users to create and manage delivery documents that accompany goods being transported. It lists item details, quantity, and delivery information without indicating pricing. This helps in tracking shipments, verifying deliveries, and maintaining legal proof of goods transfer.

Date	Challan #	Invoice #	Customer Name	Status	Actions
2024-05-11	DC-0025	INV-2024-0078	Wellness Clinic Pvt. Ltd.	Delivered	
2024-05-02	DC-0024	INV-2024-0075	Tech Solutions Inc.	In Transit	
2024-05-09	DC-0023	INV-2024-0077	BlueWave Technologies Inc.	Returned	
2024-04-29	DC-0022	INV-2024-0074	GreenScape Gardens & Landscaping	Delivered	
2024-04-26	DC-0021	INV-2024-0073	Modern Apparel & Fashion House	Delivered	
2024-04-23	DC-0020	INV-2024-0072	Coastal Exporters International	In Transit	

Showing 1 to 10 of 10 challans

Fig 9.1. List of Delivery challans created

New Delivery Challan

Customer & Challan Details

Customer Name:

Delivery Challan #:

Reference #:

Delivery Challan Date:

Challan Type:

deliveryChallans.itemTable.title

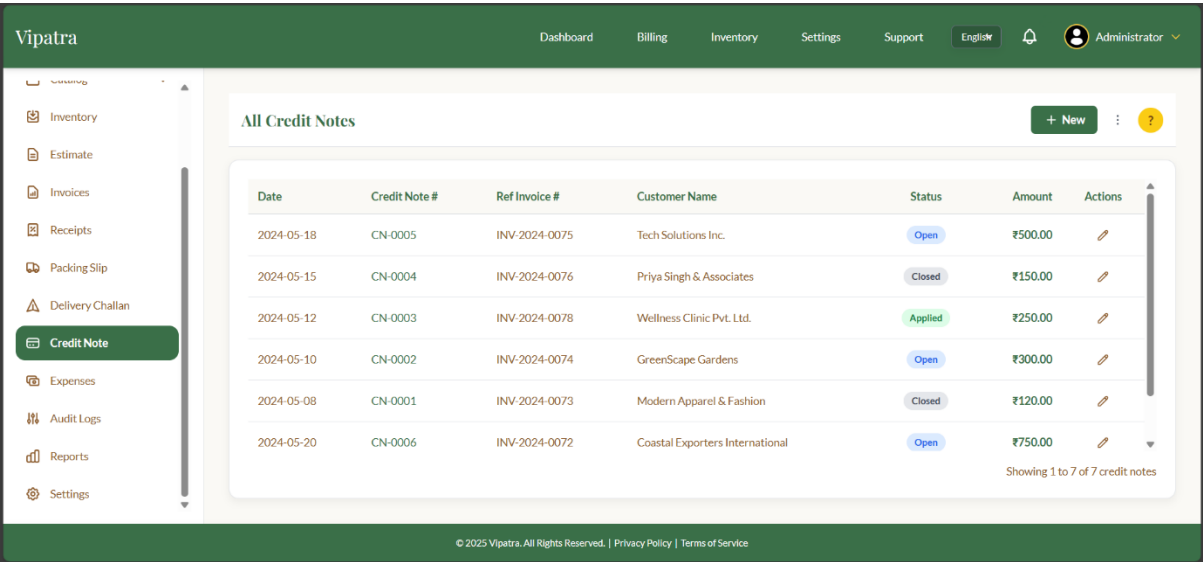
ITEM DETAILS	QUANTITY	DESCRIPTION (OPTIONAL)
<input type="text" value="common.searchOrType"/>	<input type="text" value="1"/>	<input type="text" value="common.optional"/>

Fig 9.2. Create new Delivery challan form

10) Credit Note

Purpose

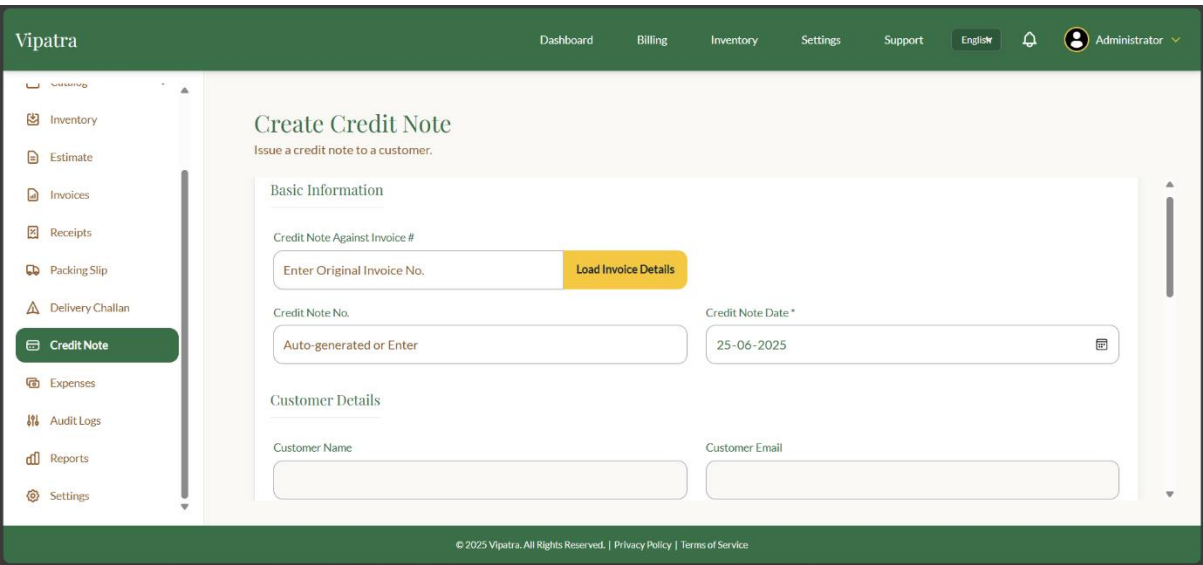
The Credit Note section allows users to issue credit notes to customers for returned goods, overpayments, or billing adjustments. It helps in correcting invoice amounts and maintaining accurate financial records by reflecting the reduced receivable amount.



Date	Credit Note #	Ref Invoice #	Customer Name	Status	Amount	Actions
2024-05-18	CN-0005	INV-2024-0075	Tech Solutions Inc.	Open	₹500.00	
2024-05-15	CN-0004	INV-2024-0076	Priya Singh & Associates	Closed	₹150.00	
2024-05-12	CN-0003	INV-2024-0078	Wellness Clinic Pvt. Ltd.	Applied	₹250.00	
2024-05-10	CN-0002	INV-2024-0074	GreenScape Gardens	Open	₹300.00	
2024-05-08	CN-0001	INV-2024-0073	Modern Apparel & Fashion	Closed	₹120.00	
2024-05-20	CN-0006	INV-2024-0072	Coastal Exporters International	Open	₹750.00	

Showing 1 to 7 of 7 credit notes

Fig 10.1. list of credit notes created



Create Credit Note
Issue a credit note to a customer.

Basic Information

Credit Note Against Invoice #
Enter Original Invoice No. Load Invoice Details

Credit Note No.
Auto-generated or Enter

Credit Note Date *
25-06-2025

Customer Details

Customer Name

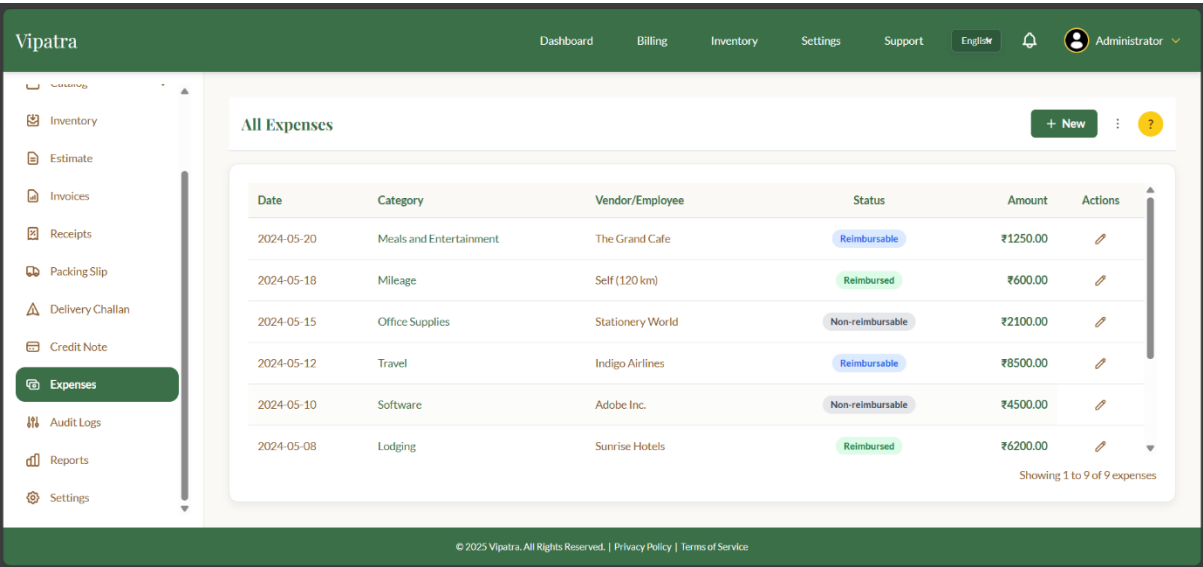
Customer Email

Fig 10.2. New credit notes create form

11)Expenses page

Purpose

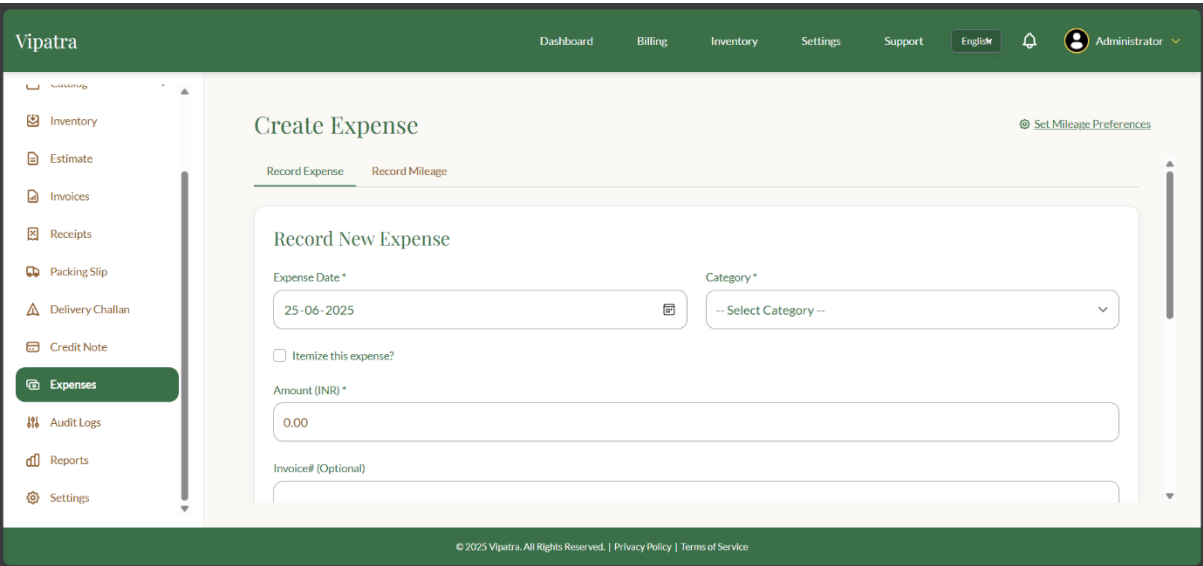
The Expense section is used to record and track business expenses. It helps maintain a clear record of all outgoing payments, making it easier to monitor spending and manage company finances.



The screenshot displays the 'All Expenses' page in the Vipatra application. The page features a sidebar with navigation options: Inventory, Estimate, Invoices, Receipts, Packing Slip, Delivery Challan, Credit Note, Expenses (highlighted), Audit Logs, Reports, and Settings. The main content area shows a table of expenses with columns for Date, Category, Vendor/Employee, Status, Amount, and Actions. The table lists six expenses from May 8, 2024, to May 20, 2024. A '+ New' button and a help icon are located at the top right of the table. The footer indicates 'Showing 1 to 9 of 9 expenses'.

Date	Category	Vendor/Employee	Status	Amount	Actions
2024-05-20	Meals and Entertainment	The Grand Cafe	Reimbursable	₹1250.00	
2024-05-18	Mileage	Self (120 km)	Reimbursed	₹600.00	
2024-05-15	Office Supplies	Stationery World	Non-reimbursable	₹2100.00	
2024-05-12	Travel	Indigo Airlines	Reimbursable	₹8500.00	
2024-05-10	Software	Adobe Inc.	Non-reimbursable	₹4500.00	
2024-05-08	Lodging	Sunrise Hotels	Reimbursed	₹6200.00	

Fig 11.1. List of expenses forms created



The screenshot shows the 'Create Expense' form in the Vipatra application. The form has two tabs: 'Record Expense' (selected) and 'Record Mileage'. The 'Record Expense' tab contains the following fields: 'Expense Date *' (with a date picker set to 25-06-2025), 'Category *' (a dropdown menu showing '-- Select Category --'), an unchecked checkbox for 'Itemize this expense?', 'Amount (INR) *' (a text input field with 0.00), and 'Invoice# (Optional)' (a text input field). A 'Set Mileage Preferences' link is located at the top right of the form. The sidebar and footer are consistent with the previous screenshot.

Fig 11.2. New Expense create form

The screenshot shows the Vipatra application interface. The top navigation bar includes links for Dashboard, Billing, Inventory, Settings, Support, and a user profile for Administrator. A left sidebar lists various modules: Inventory, Estimate, Invoices, Receipts, Packing Slip, Delivery Challan, Credit Note, Expenses (highlighted), Audit Logs, Reports, and Settings. The main content area is titled "Mileage Preferences" with a subtitle "Set your default mileage rate and distance unit for tracking travel expenses." It contains a form with two input fields: "Default Rate per Unit Distance" with the value "0.58" and a unit selector set to "USD / km", and "Distance Unit" with a dropdown menu set to "Kilometers (km)". There are "Cancel" and "Save Preferences" buttons at the bottom right of the form. The footer contains the copyright notice "© 2025 Vipatra. All Rights Reserved. | Privacy Policy | Terms of Service".

Fig 11.3. form for mileage preferences

The screenshot shows the Vipatra application interface for the "Create Expense" section. The top navigation bar and left sidebar are identical to the previous figure. The main content area is titled "Create Expense" with a link to "Set Mileage Preferences". Below the title are two tabs: "Record Expense" and "Record Mileage" (which is active). The "Record Mileage" form includes a "Date *" field with the value "25-06-2025", an "Employee (Optional)" field, and a "Calculate mileage using" section with two radio buttons: "Distance travelled" (selected) and "Odometer reading". Below this is a "Distance" field with a unit selector set to "Kilometer(s)". At the bottom of the form is an "Amount (INR) *" field. The footer contains the copyright notice "© 2025 Vipatra. All Rights Reserved. | Privacy Policy | Terms of Service".

Fig 11.4. New form recording milage

12) Audit logs

Purpose

The Audit Logs section is designed for administrators to monitor and trace user activities across the system. It captures detailed records of actions such as creation, updates, deletions, and payments, along with metadata like timestamps, user IDs, IP addresses, and before/after data. This ensures transparency, supports security audits, and helps in debugging or compliance reporting.

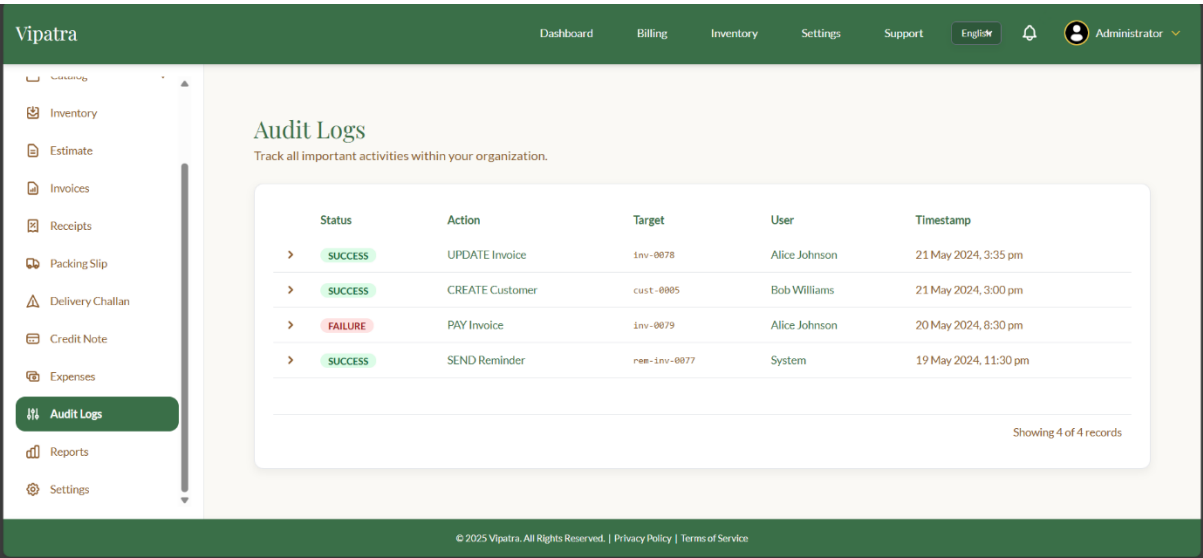


Fig 11.4. Audit logs for admin

13) Reports Page

Purpose

The Reports & Analytics section provides detailed insights into the financial and operational performance of the business. It helps users make informed decisions by offering various reports such as:

- Sales Reports – Analyze revenue trends, sales by item, and customer-wise sales.
- Payment Status Reports – Track received, pending, and overdue payments.
- Tax Liability Reports – View collected taxes to assist in compliance and tax filing.
- Customer Aging Reports – Understand outstanding receivables by customer and due period.
- Inventory Reports – Monitor stock levels, movements, and overall inventory valuation.
- Expense Reports – Track and categorize business expenses effectively.

This section ensures better financial visibility and supports strategic planning

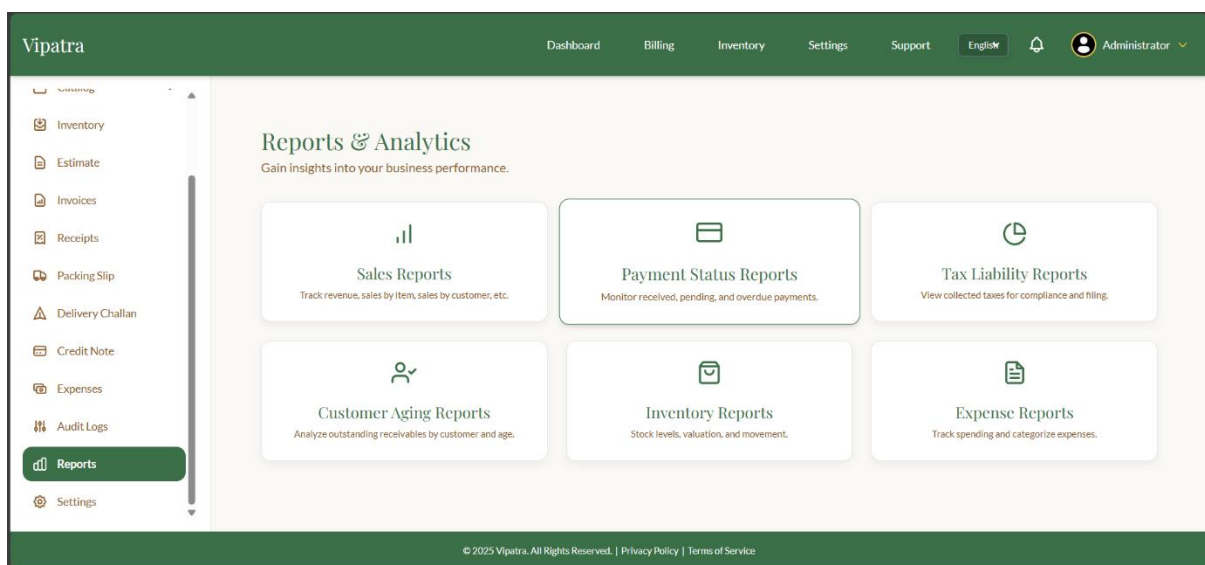


Fig 13.1. Reports page

14)Settings page

Purpose

The Settings Menu allows administrators to configure and manage core aspects of the system, ensuring the application aligns with the organization's preferences and operational needs. It includes:

- Organization Profile – Manage company details such as name, address, and industry.
- User Management – Add, update, or remove user accounts and assign roles or permissions.
- Invoice Customization – Customize invoice templates, logos, and formats.
- e-Invoicing – Enable and configure e-invoice compliance settings.
- Tax Settings – Define tax rates, GST, VAT, and tax rules based on the business model.
- Payment Gateways – Connect and manage online payment integrations (e.g., Razorpay, Stripe).
- Email Settings – Configure sender details, templates, and SMTP for automated email communication.
- Data Management – Handle data backups, imports, exports, and retention policies.
- Integrations – Connect with external systems like accounting tools, CRMs, or ERPs.

This section ensures the platform is tailored to fit specific business and compliance requirements

The screenshot displays the Vipatra application's Settings Menu. The top navigation bar includes links for Dashboard, Billing, Inventory, Settings (highlighted), Support, and a language selector set to English. A user profile icon for 'Administrator' is also present. The left sidebar lists various system modules: Inventory, Estimate, Invoices, Receipts, Packing Slip, Delivery Challan, Credit Note, Expenses, Audit Logs, Reports, and Settings (selected). The main content area is titled 'Settings Menu' with the subtitle 'Manage your organization, users, and system preferences.' Below this, a horizontal tab bar allows switching between different settings sections: Organization Profile (active), User Management, Invoice Customization, e-Invoicing, Tax Settings, Payment Gateways, and Email Settings. The 'Organization Profile' section contains several input fields: 'Organization Name *' with the value 'Vipatra Billing Pro Inc.', 'Industry' with a dropdown menu showing 'Software', 'Address *' with the value '123 App Street, Tech City, TC 54321', 'Email *', and 'Phone *'. The footer of the application states '© 2025 Vipatra. All Rights Reserved. | Privacy Policy | Terms of Service'.

Fig 14.1. Settings page

15)Multi Language Support

Purpose

The application UI supports multilingual usage to enhance accessibility for regional users. Screens and labels are available in Kannada and Hindi, ensuring that users can interact with the system in their preferred language.

This feature improves usability for non-English speakers and makes the platform more inclusive for diverse user groups.

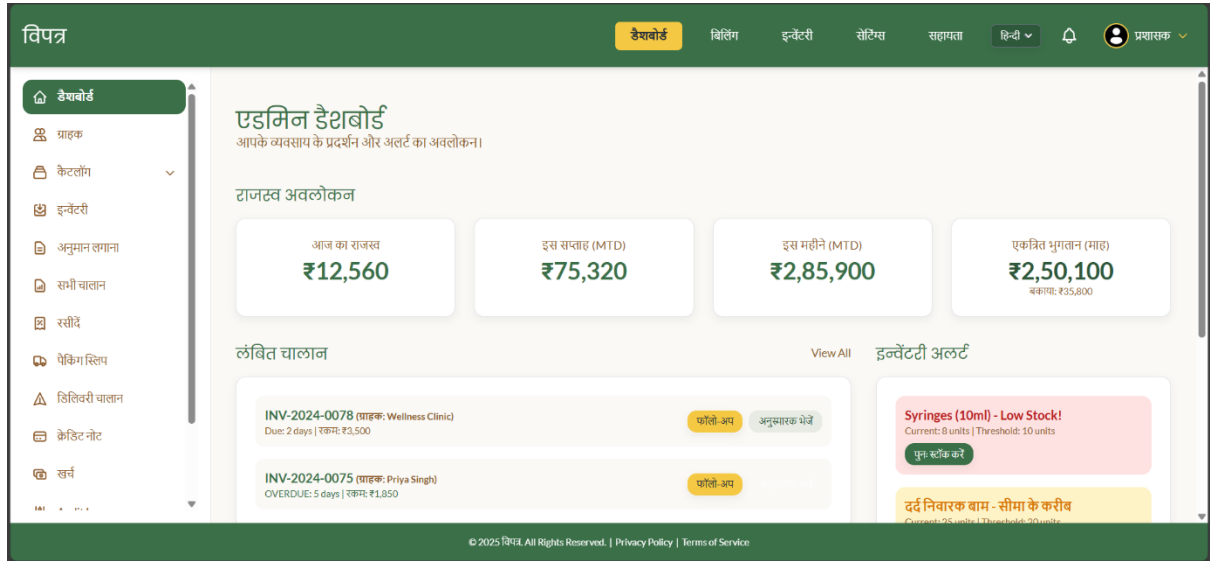


Fig 15.1. UI screen with Hindi translation

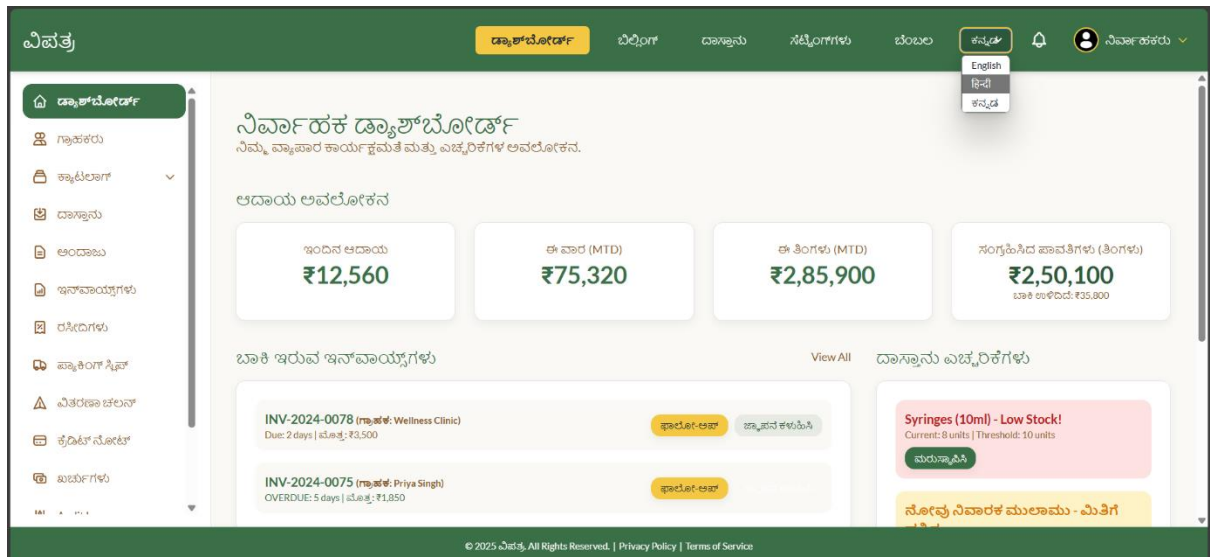


Fig 15.1. UI screen with Kannada translation