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.

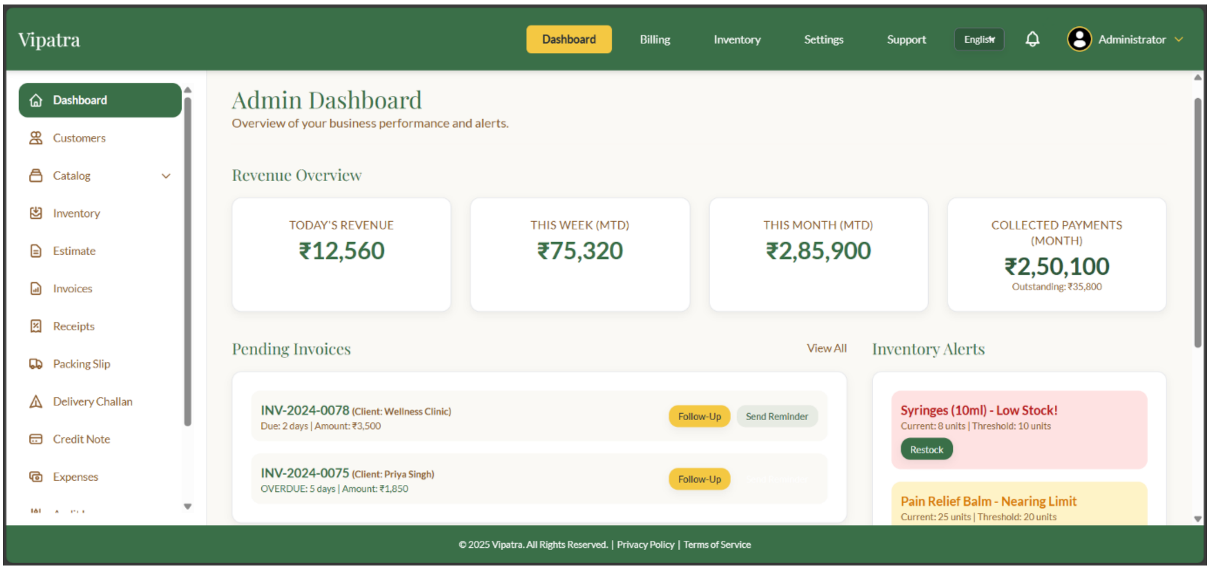

Fig 1.1. Admin Dashboard with revenue overview and pending invoices

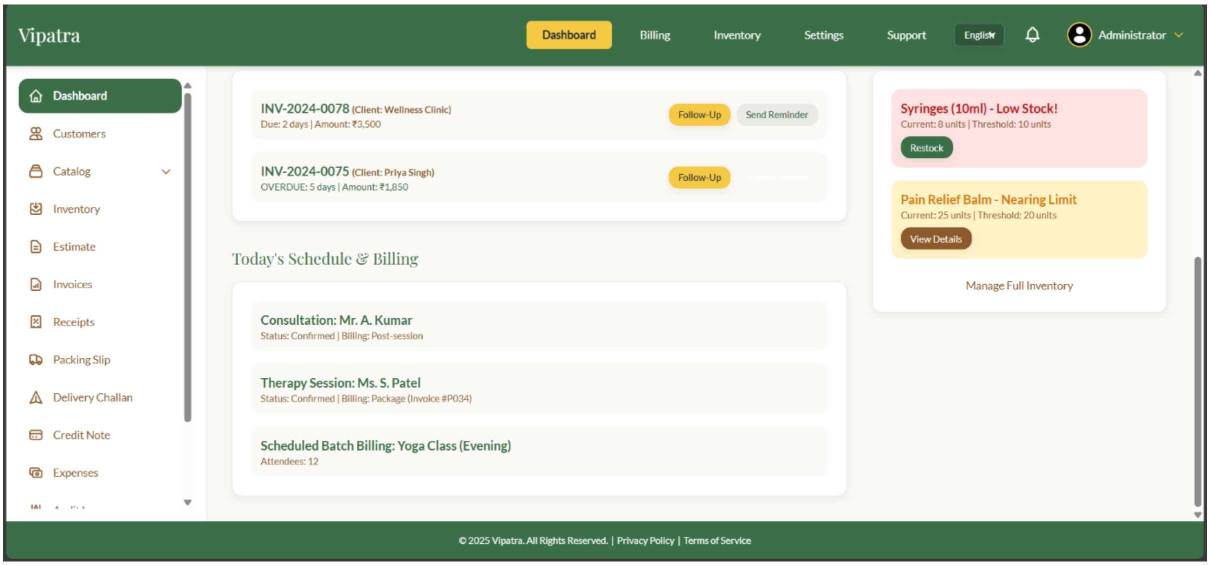

Fig 1.2. Admin Dashboard with Today's Schedule & billing and Inventory alerts

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

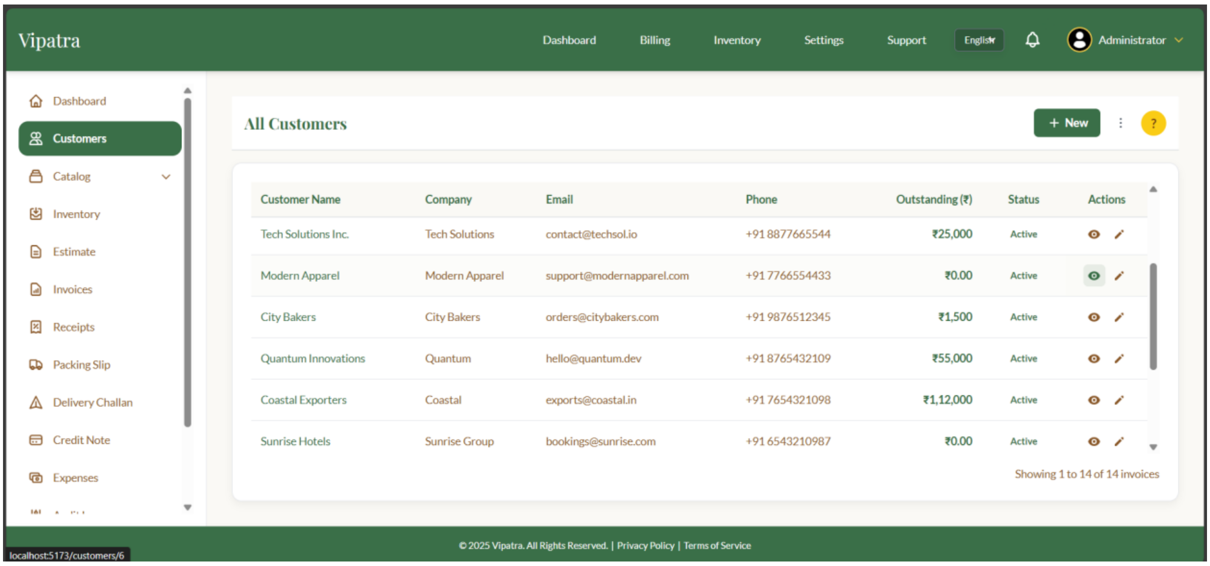

Fig 2.1. List of customers with details

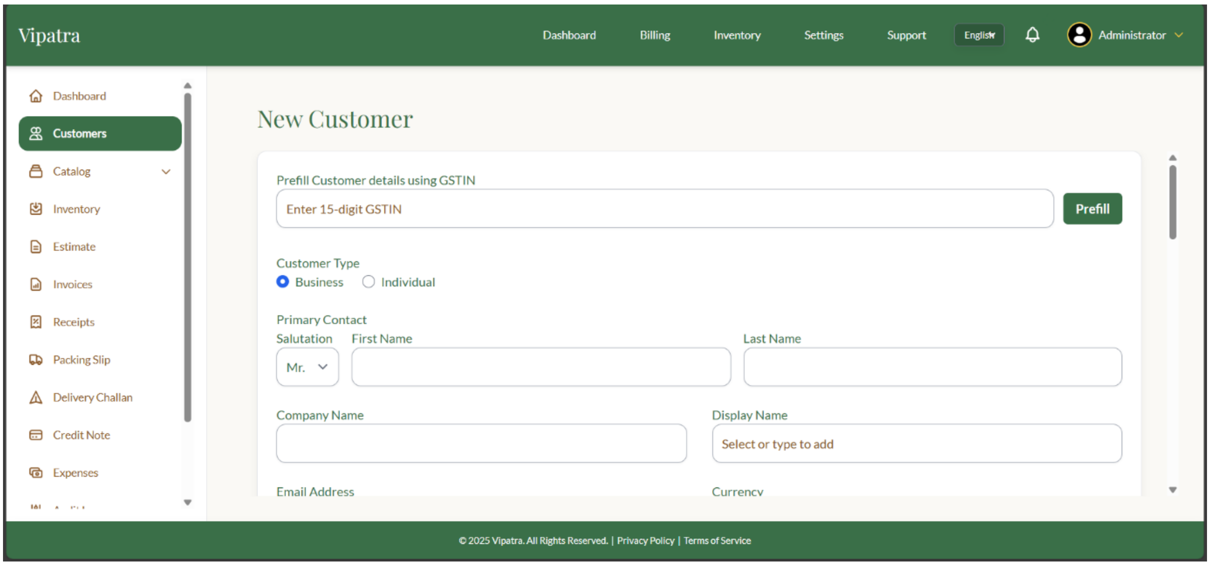

Fig 2.2. New Customer create page

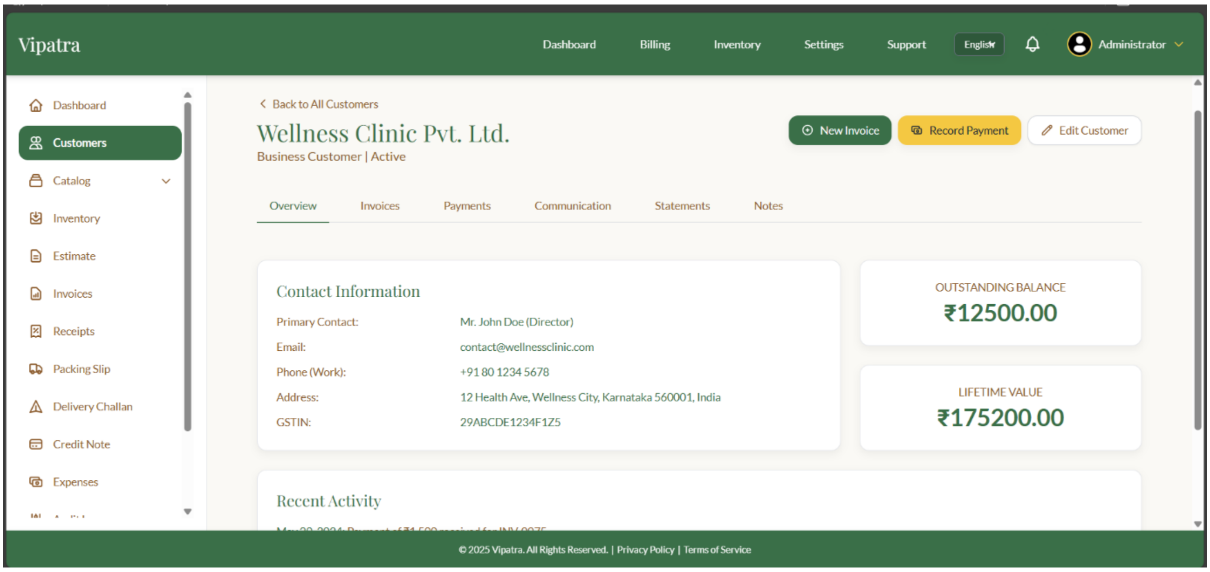

Fig 2.3. Customer details page

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.

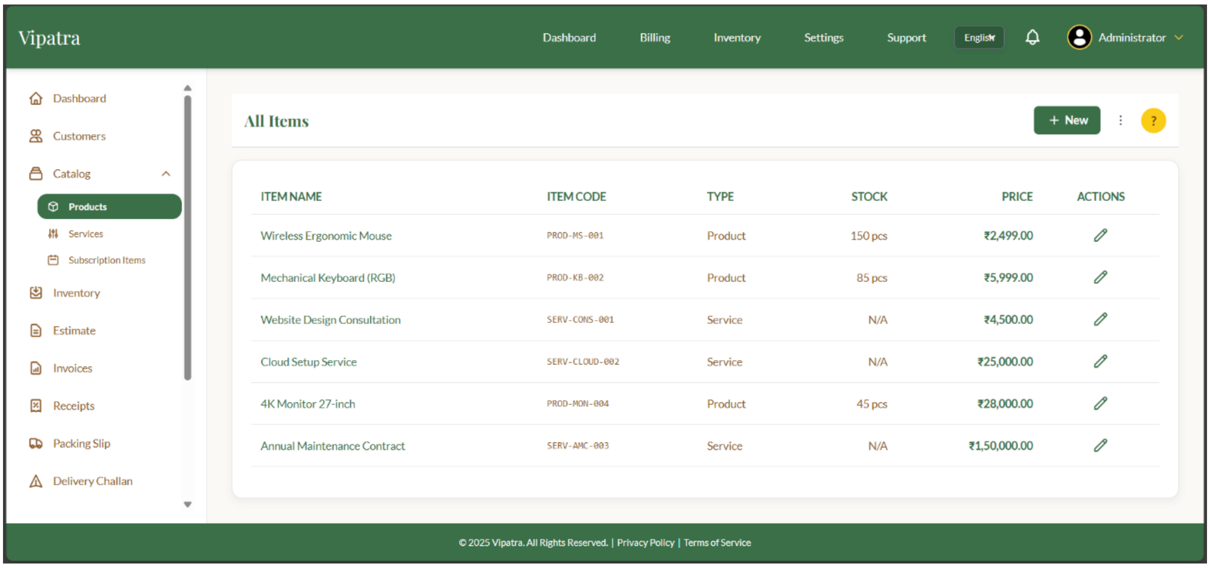

Fig 3.1.List of items

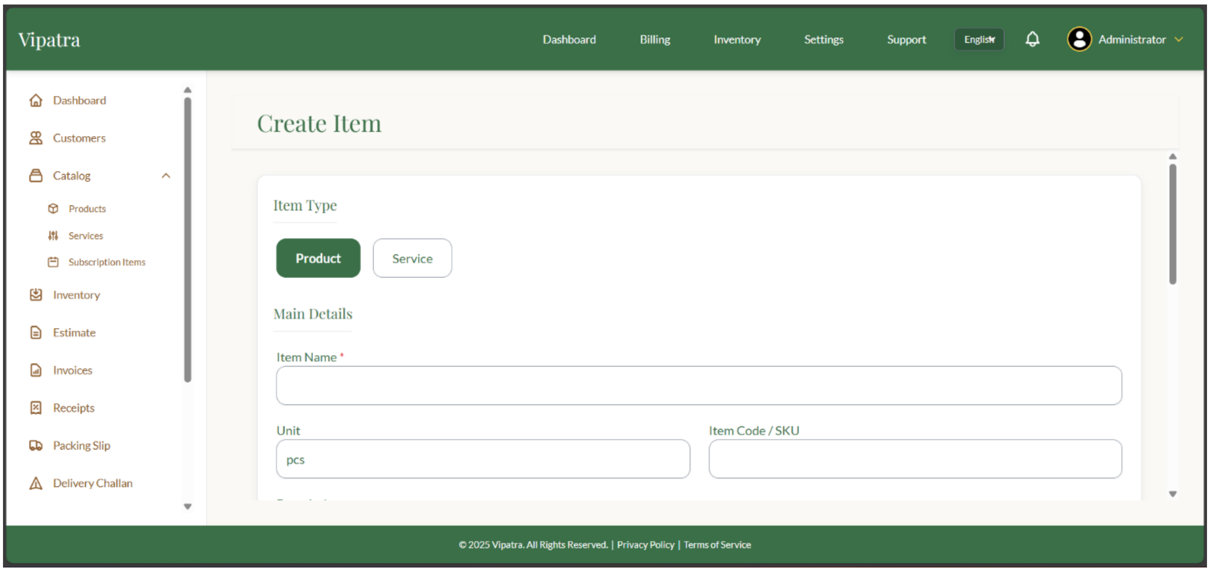

Fig 3.2. Create new item

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.

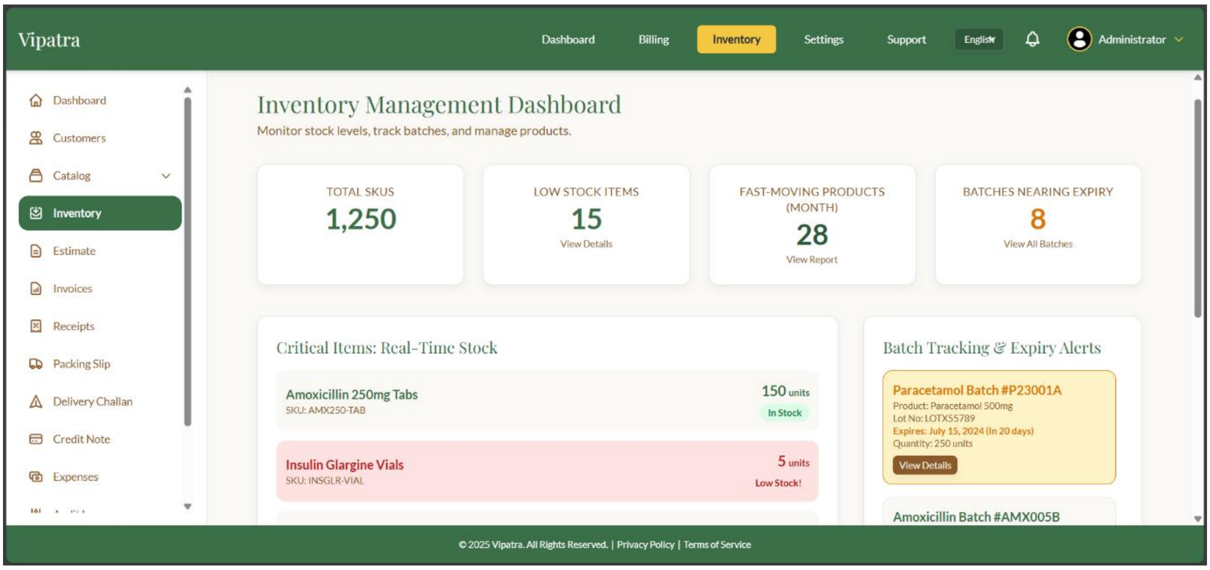

Fig 4.1.Inventory Dashboard

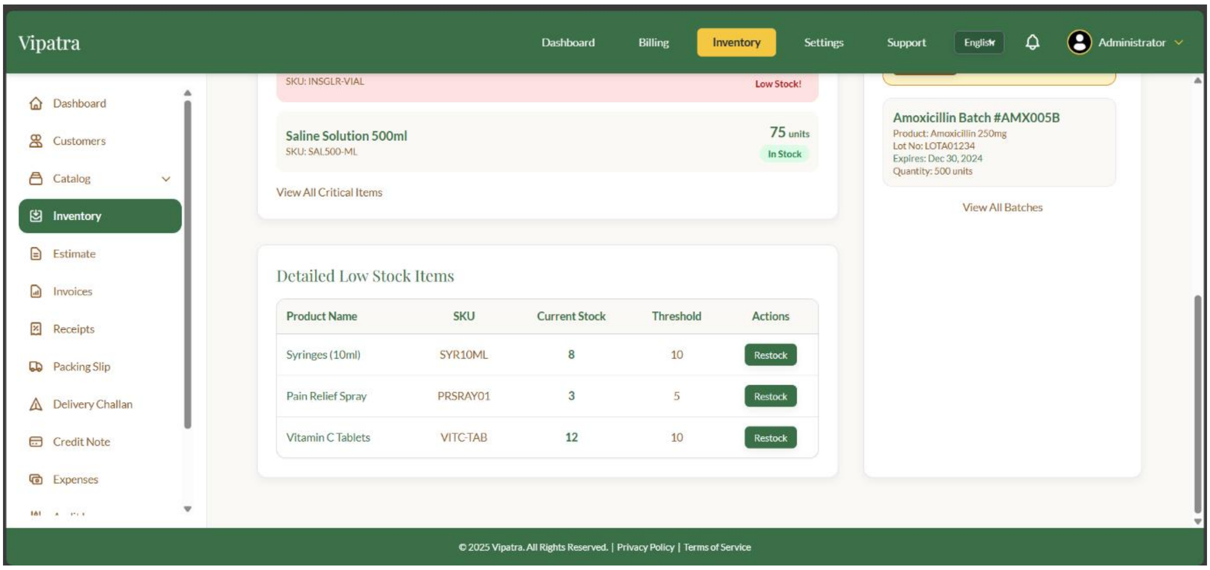

Fig 4.2. Inventory Dashboard

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.

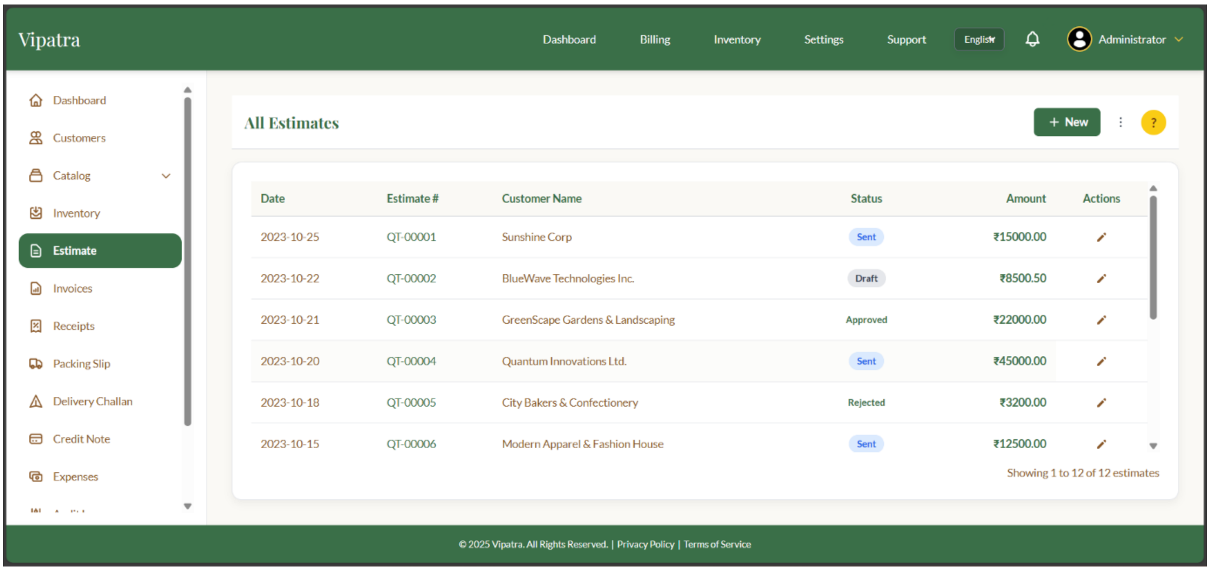

Fig 5.1. Estimate list

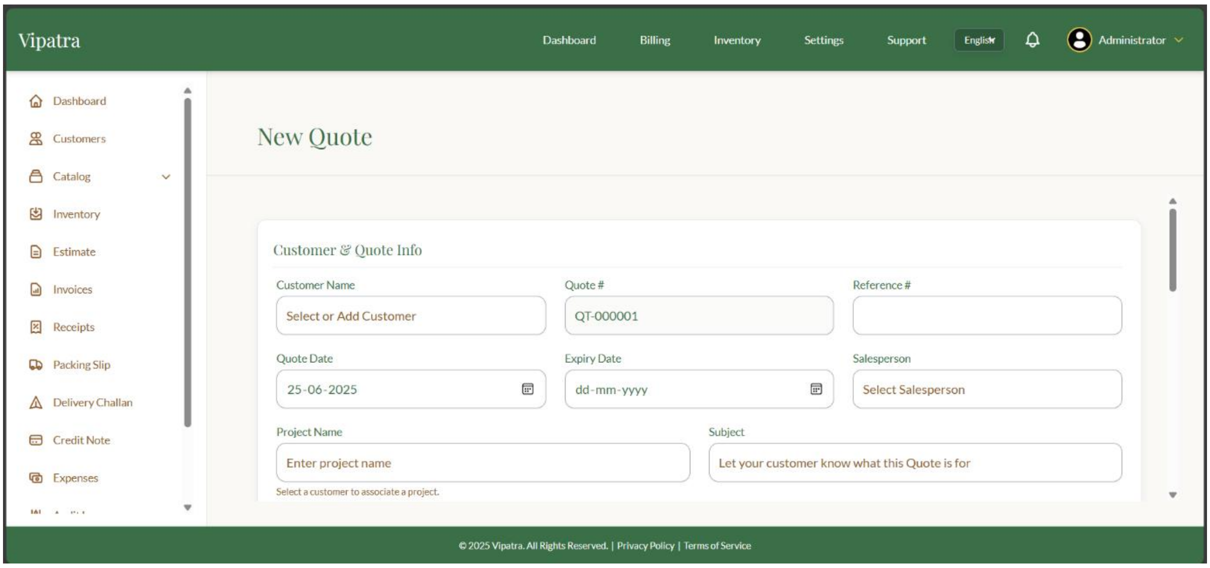

Fig 5.2. New Estimate create form

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.

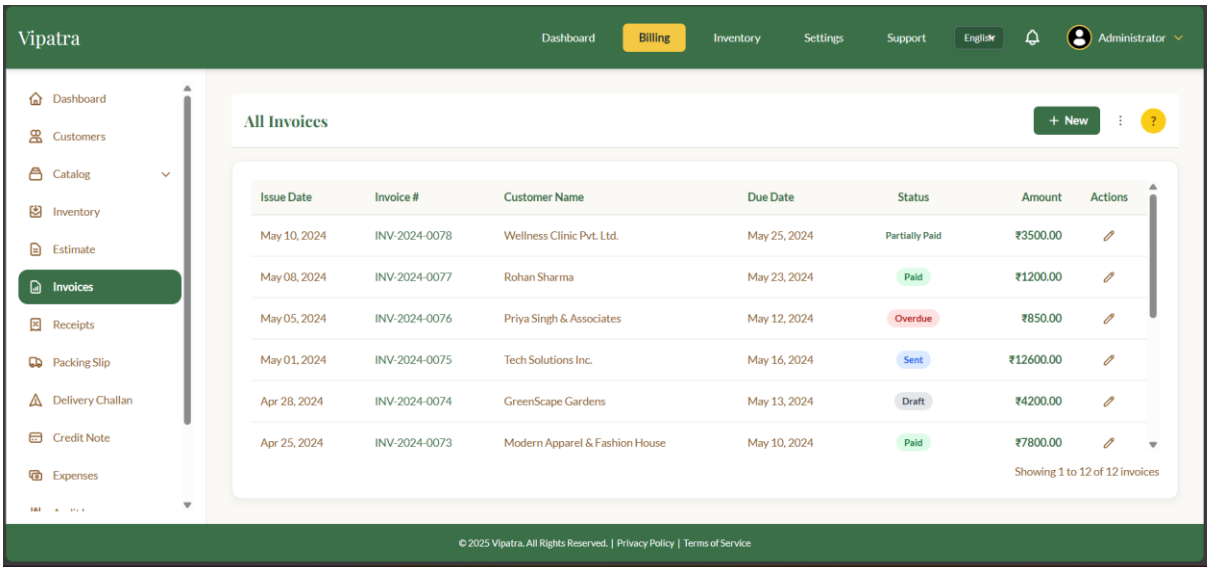

Fig 6.1. List of Invoices

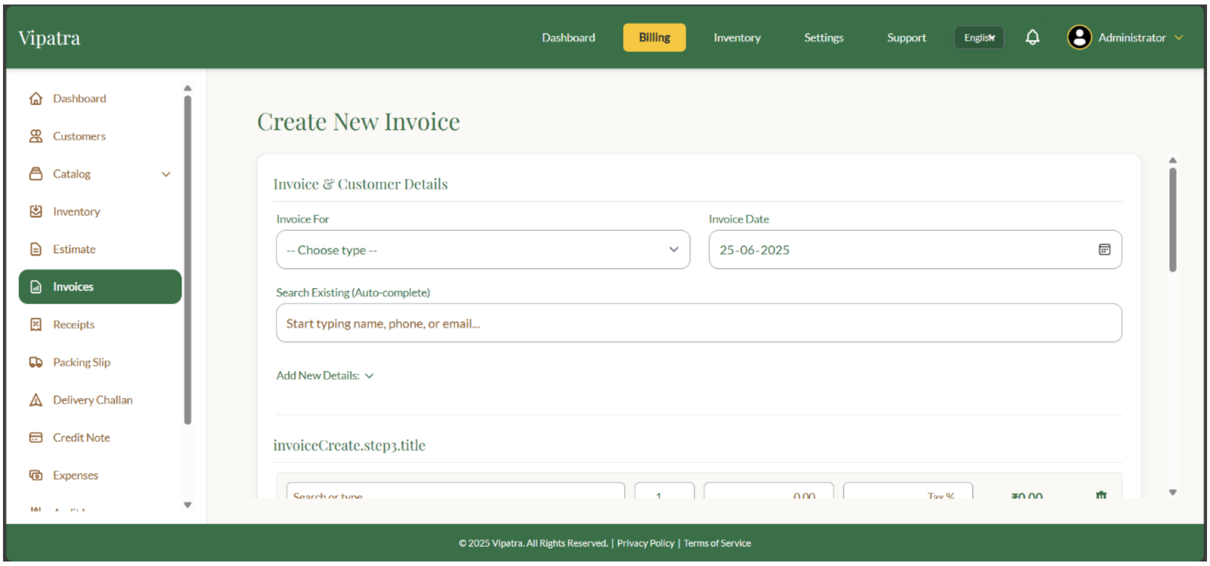

Fig 6.2. New Invoice create form

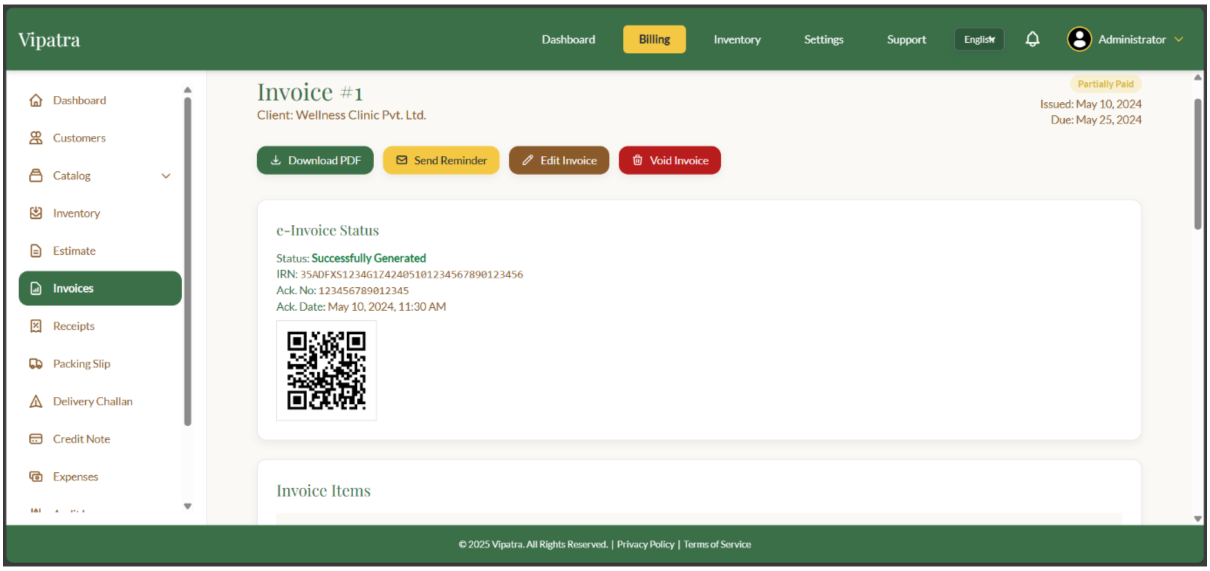

Fig 6.3. Invoice Details page

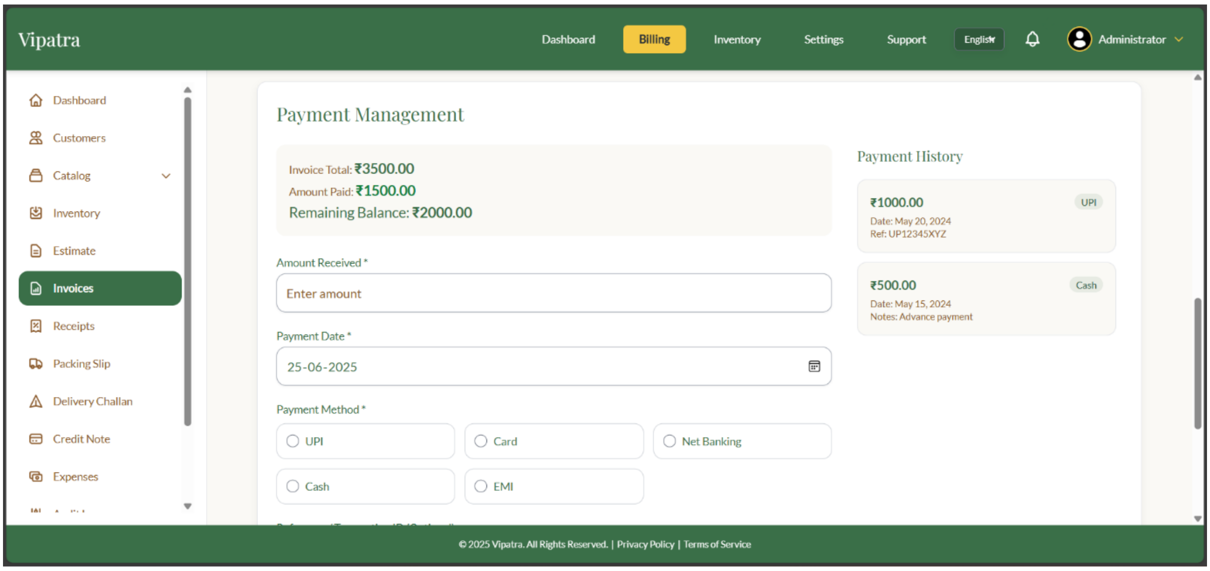

Fig 6.4. Payment Management and payment history for an invoice

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.

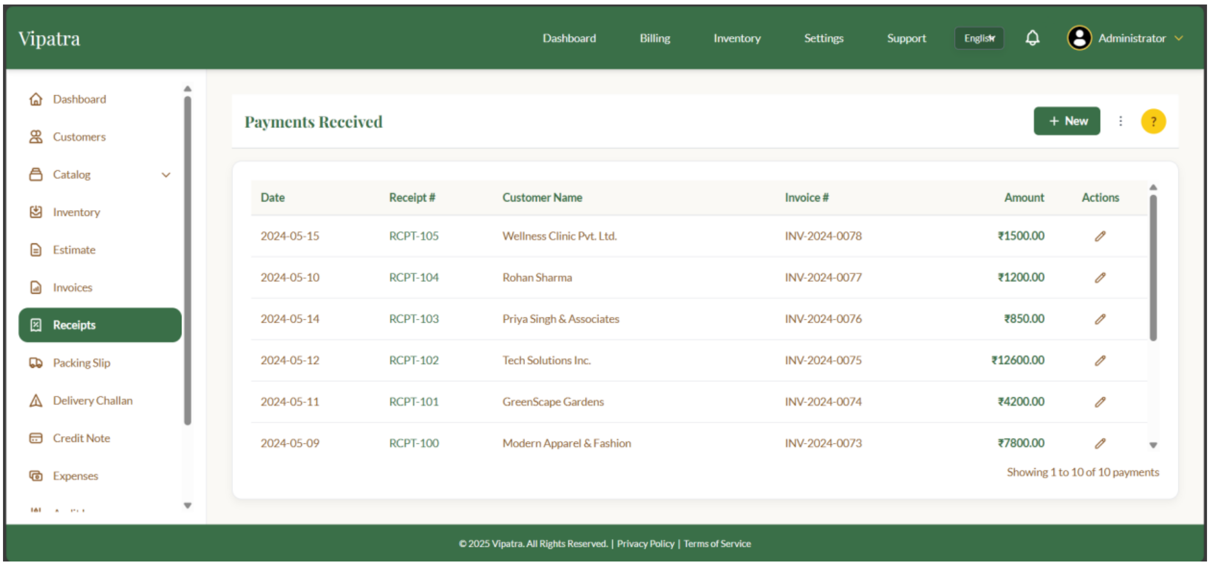

Fig 7.1. List of Payments Received

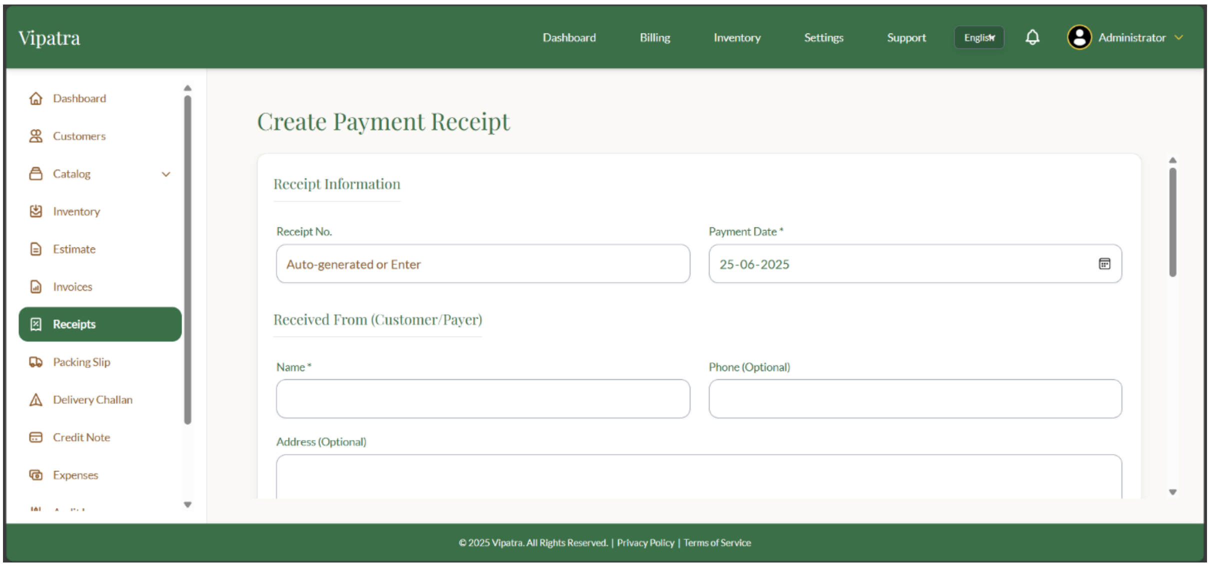

Fig 7.2. Create new Receipt form

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.

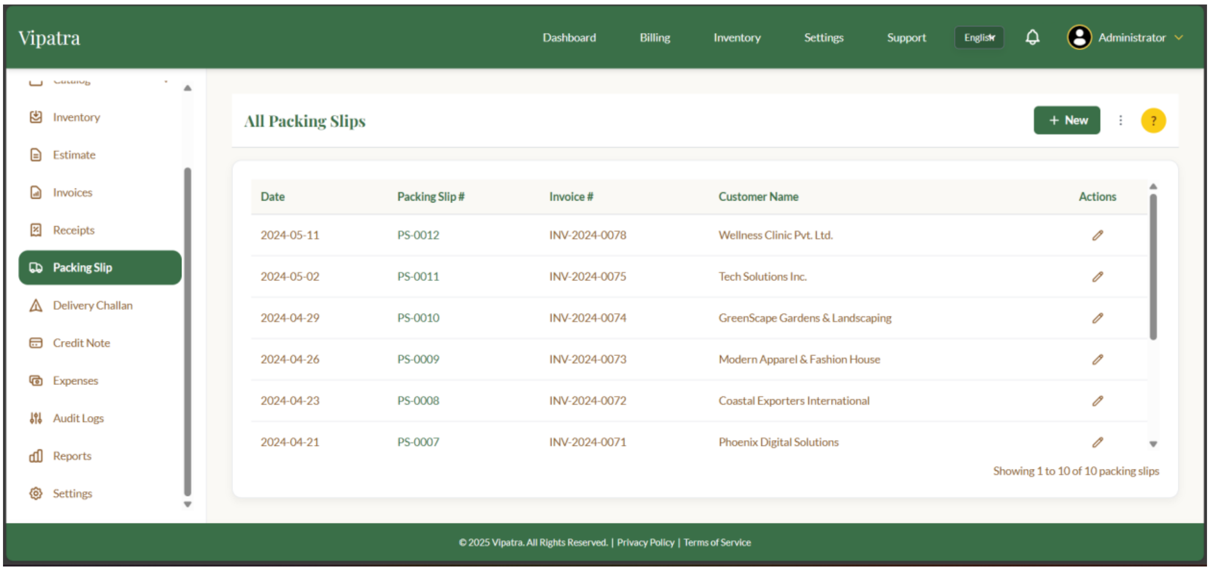

Fig 8.1. List of Packing slip list

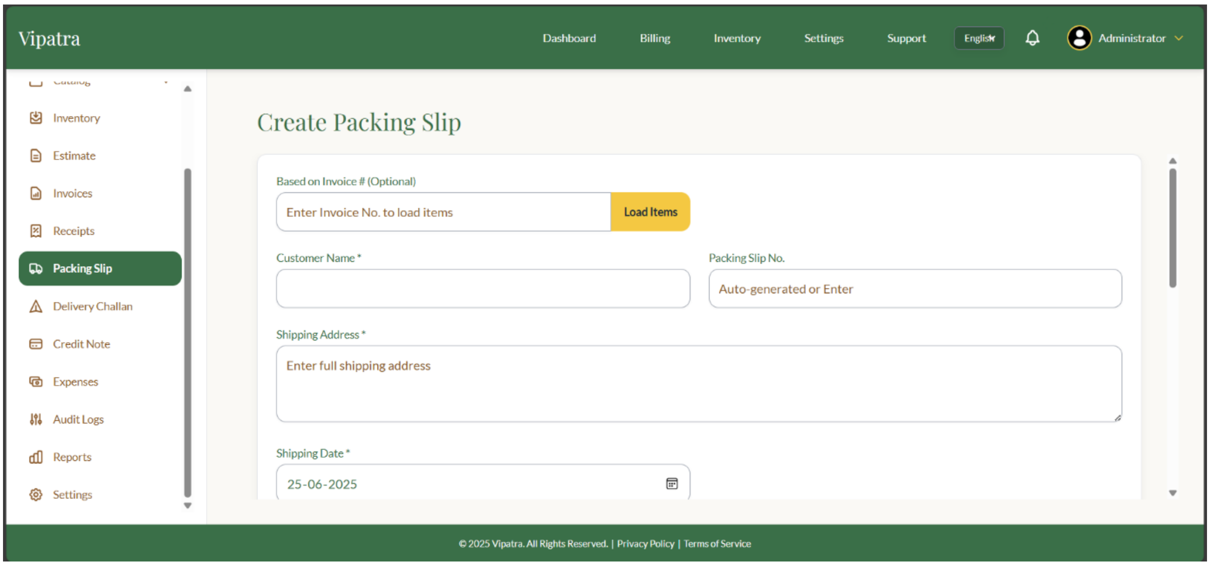

Fig 8.2. Create new Packing slip form

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.

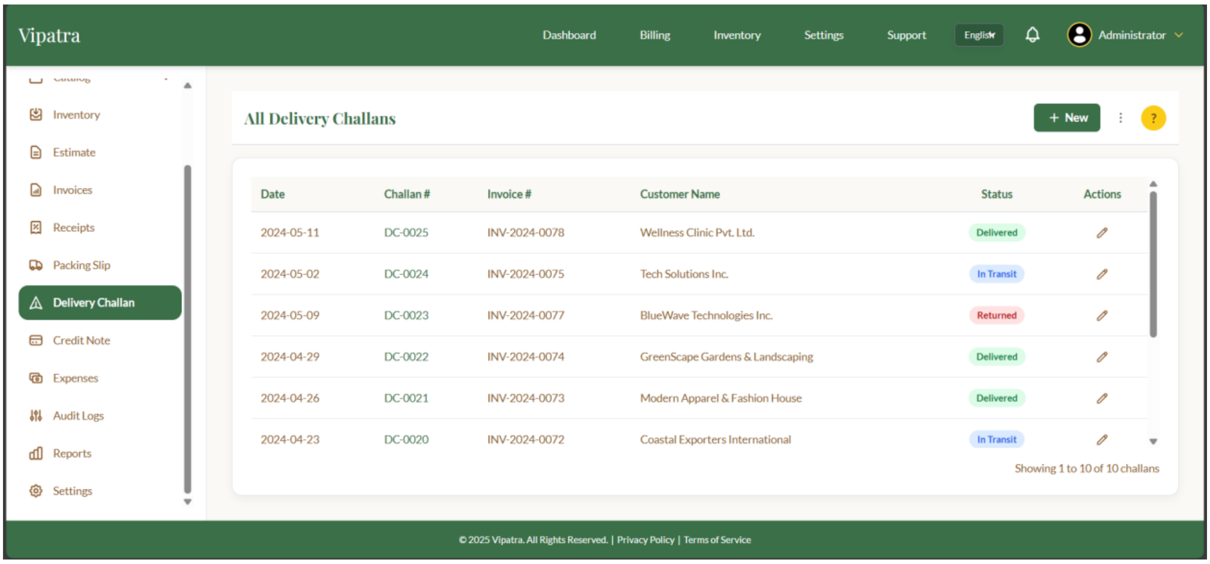

Fig 9.1. List of Delivery challans created

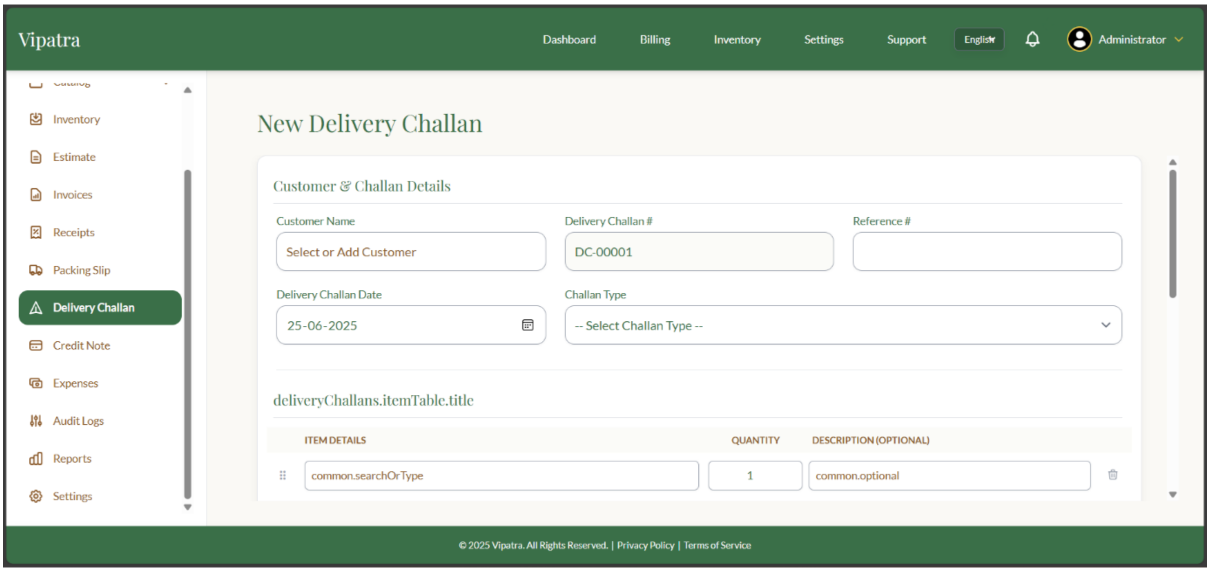

Fig 9.2. Create new Delivery challan form

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.

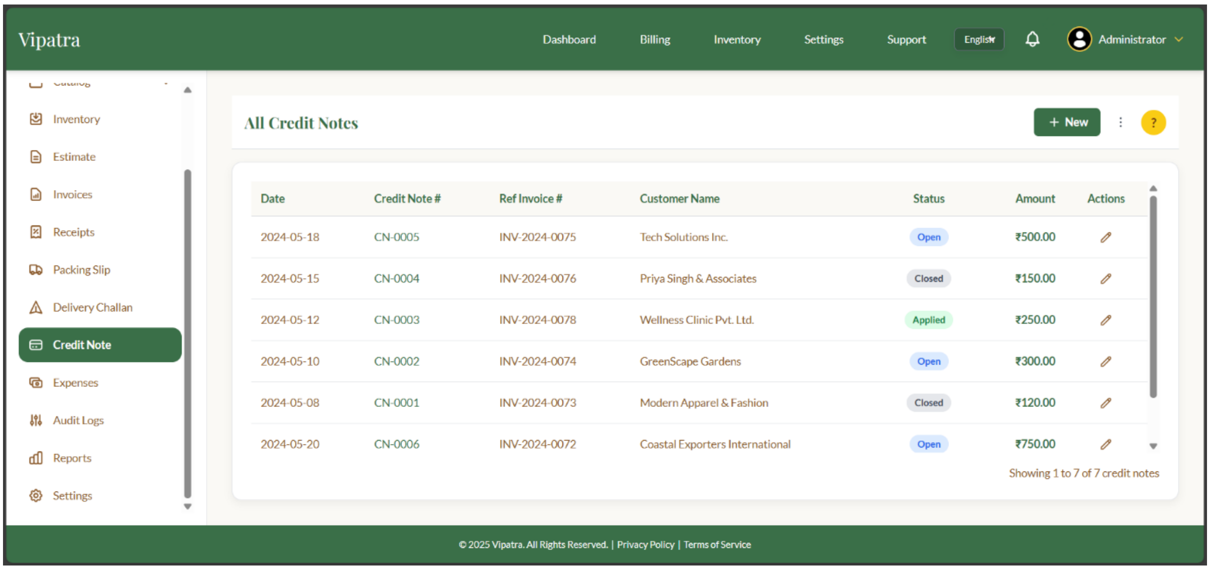

Fig 10.1. list of credit notes created

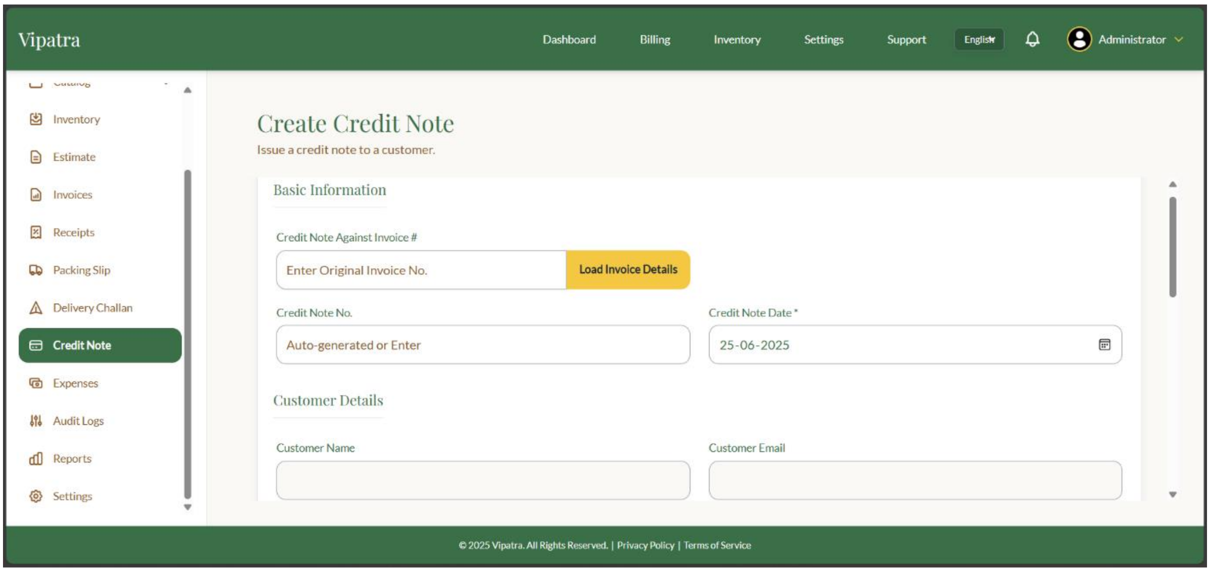

Fig 10.2. New credit notes create form

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.

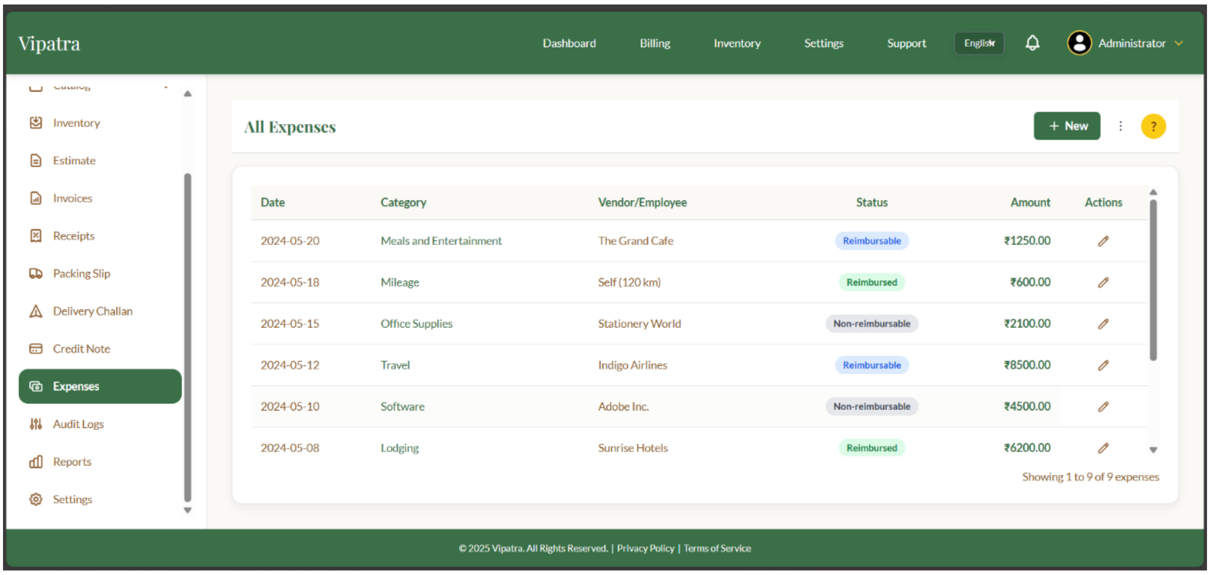

Fig 11.1. List of expenses forms created

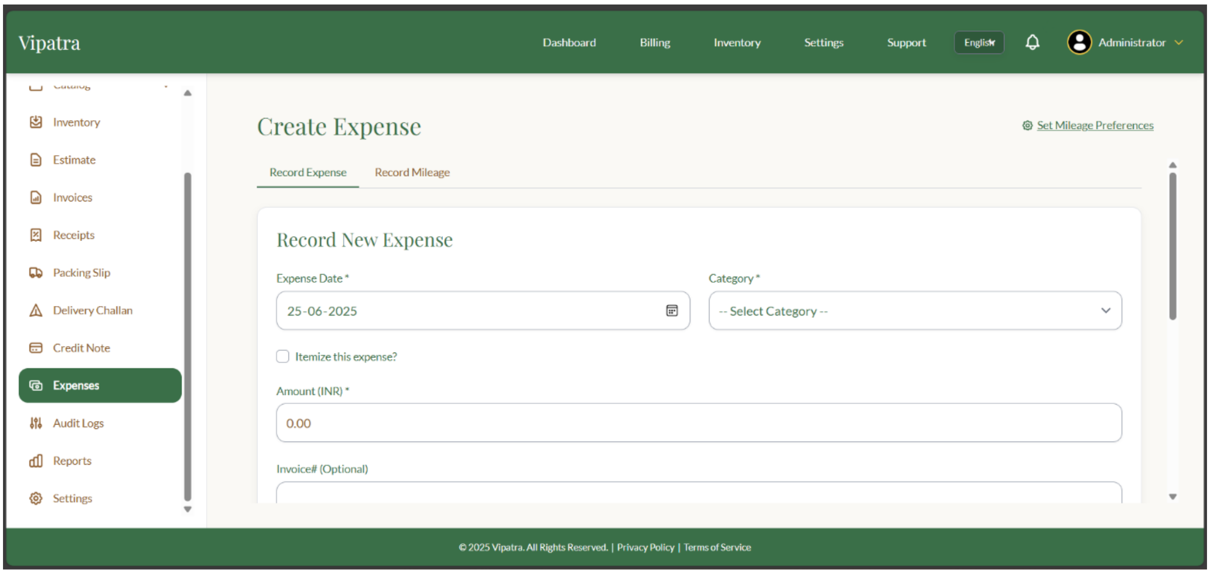

Fig 11.2. New Expense create form

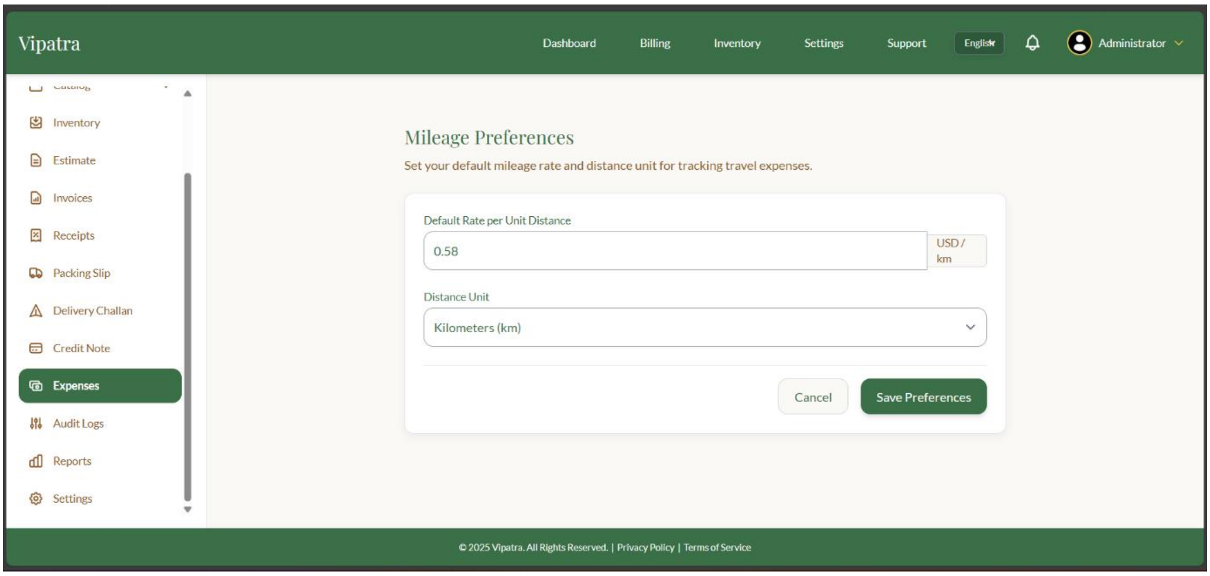

Fig 11.3. form for mileage preferences

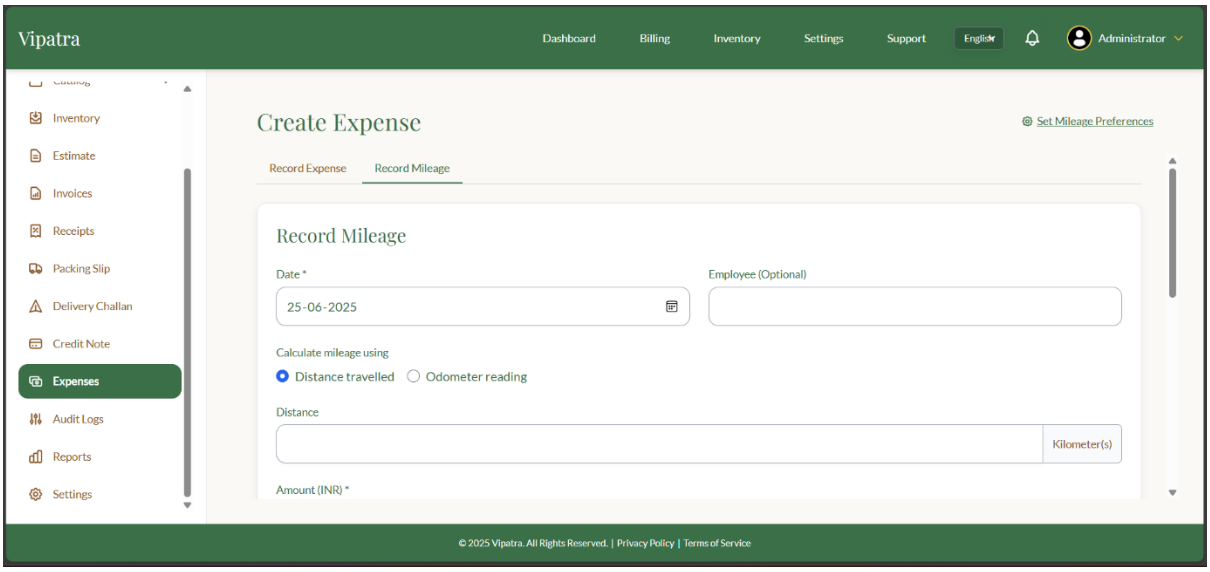

Fig 11.4. New form recording milage

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.

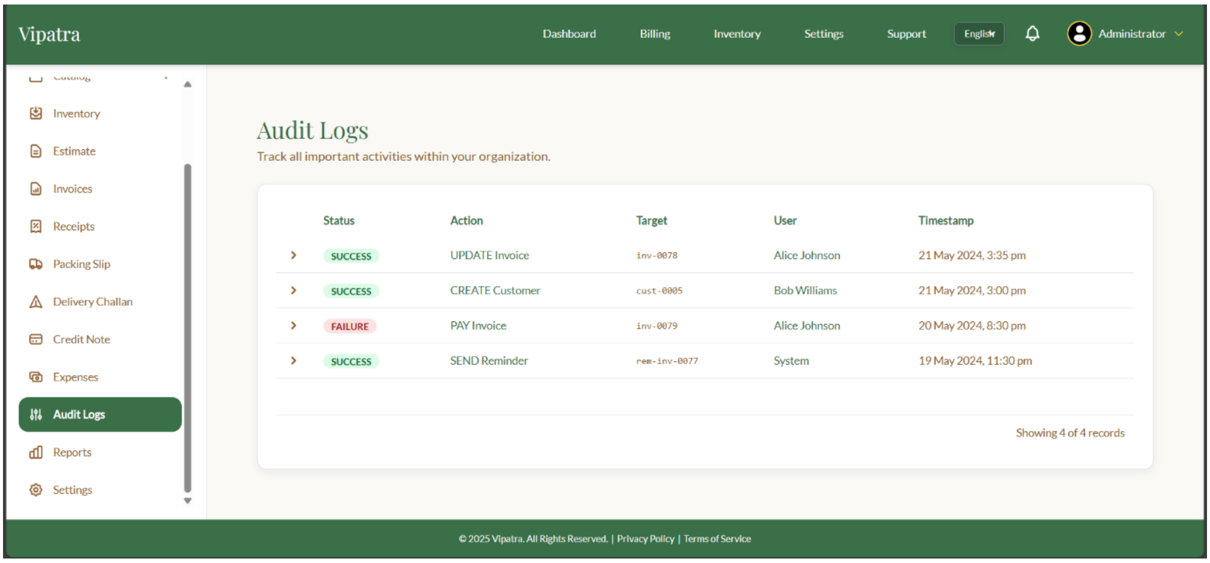

Fig 11.4. Audit logs for admin

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

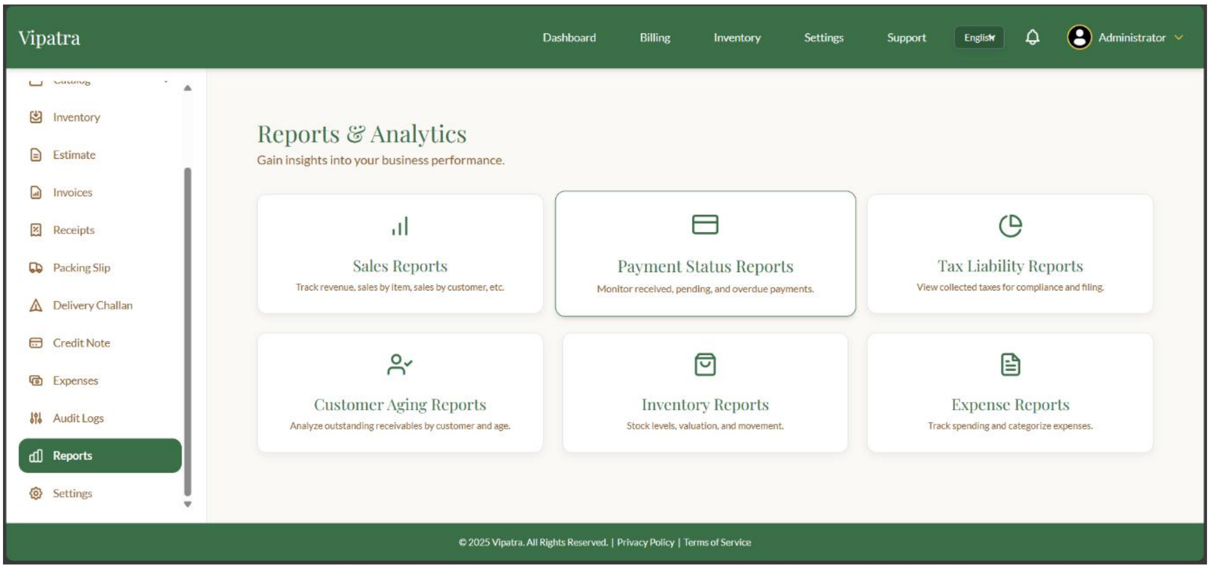

Fig 13.1. Reports page

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

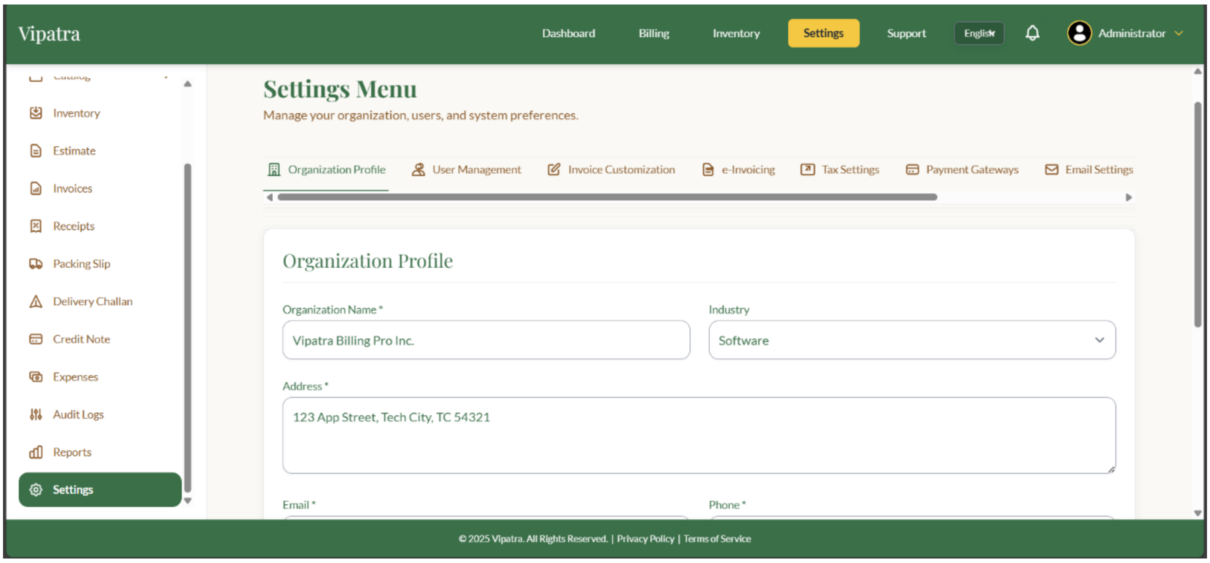

Fig 14.1. Settings page

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.

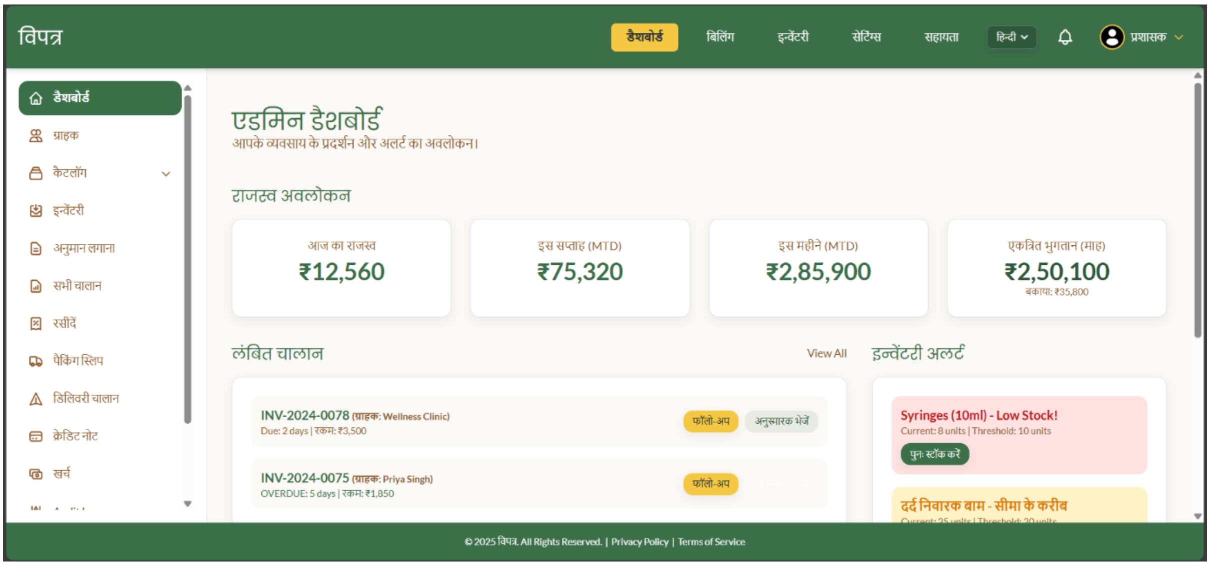

Fig 15.1. UI screen with Hindi translation

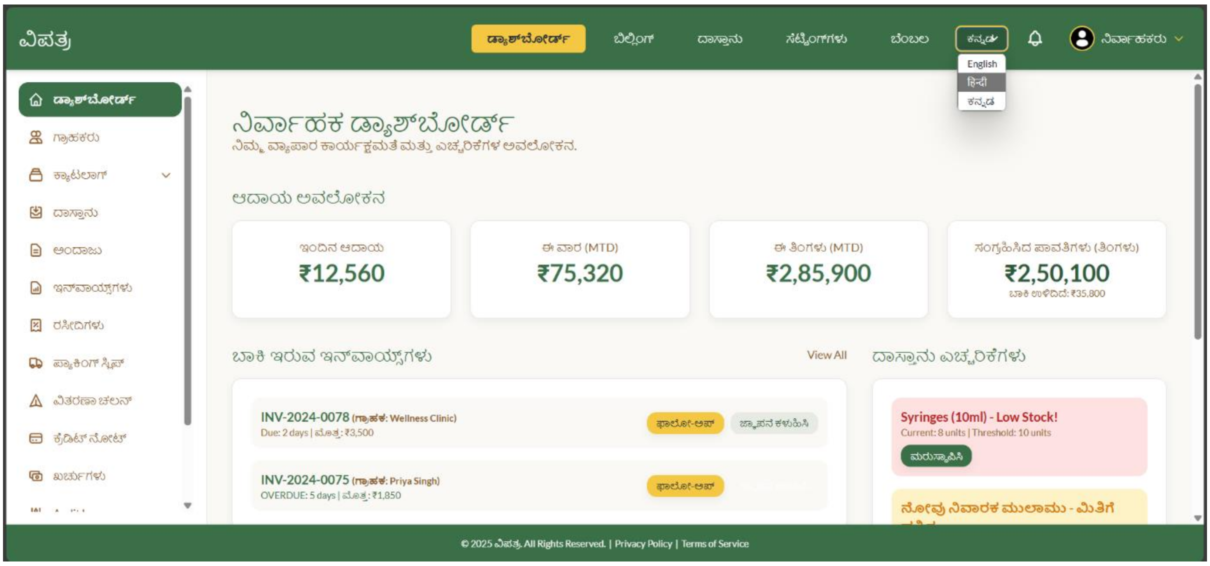

Fig 15.1. UI screen with Kannada translation