

Time tracking

Accounting

Reports

Audit log

Recent open projects

Active work in progress (completed projects are excluded).

No open projects yet.

All projects

Revenue trend

Cash-in (payments received) over the last 6 months.

Reports



move this up above getting started.

A/R aging

Open invoice balances grouped by age.

Invoices



remove invoices here

Remove this it's not in the dropdown.

Remove this it's at the top on the page.

Record a payment

Enter a payment or accept one via Stripe Checkout.

Open

Quick notes

Capture a call or quick intake while you talk.

All notes

Name

Optional

Subject

What is this about?

Email

Optional

Phone

Optional

Notes

Type your notes...

Saved privately to your user notes.

Save note

Outstanding invoices

Earliest due first. Monitor this list to get paid.

No outstanding invoices.

All invoices

Active company

EZ350PM

Switch company

Your role

Owner