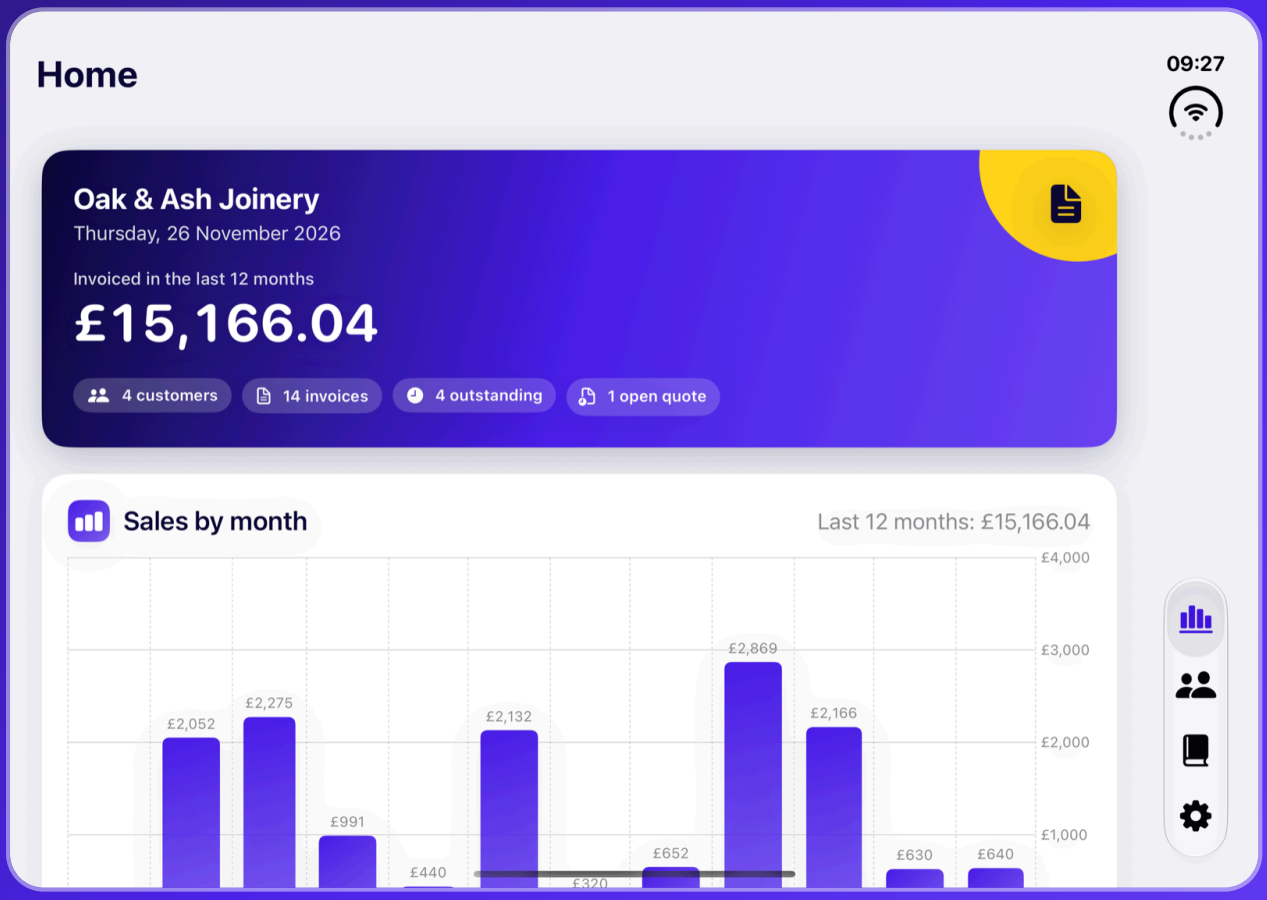
Invoice Toolbox

User Manual



For iPad and iPhone

Covers the Home overview, customers, invoices and payments, printing and emailing PDF invoices, the invoice ledger and Excel export, settings, iCloud sync, and backup & restore.

Edition 6 · November 2026

Contents

1 **Welcome**
What the app does and where your data lives

2 **Getting started**
The first-run setup wizard

3 **Home**
Sales chart, debtors list, payments received

4 **Customers**
Adding, editing, searching and the customer page

5 **Invoices**
Creating, lines, VAT, saving, printing and emailing

6 **Payments**
Recording one or more payments against an invoice

7 **Copying and deleting invoices**
Repeat work and mistakes

8 **Quotes and credit notes**
Pricing a job before it starts, and correcting an invoice after it has gone

9 **Invoice Ledger**
Month by month view and Excel export

10 **Settings**
Business details, logo, currency and tax, quotes, numbering

11 **iCloud sync**
Using the app on more than one device

12 **Backup and restore**
Keeping a copy of everything

13 **Using the app on iPhone**
What is different on the smaller screen

14 **Tips and gestures**
Quick reference

15 **Questions and troubleshooting**
Answers to common questions

1 Welcome

Invoice Toolbox is a simple invoicing app for small businesses and sole traders. It is free to download and comes with a 14-day free trial; after that a subscription covers creating new work (see section 10). You keep a list of customers, raise invoices against them, print or email the invoice as a PDF, and record payments as they come in. The Home tab shows at a glance how the year is going and who still owes you money.

What you can do

- **Customers** – name, address, telephone and email for everyone you invoice, with what they owe and what you have sold them this year.
- **Invoices** – any number of lines, each with an optional date, a description (which can run to several lines) and a value. VAT or sales tax can be added per invoice.
- **PDF invoices** – an A4 or US Letter invoice with your business details, logo, footer and tax breakdown, ready to AirPrint, save or email.
- **Payments** – record deposits and part payments; the balance and status update automatically.
- **Quotes and credit notes** – price a job first and convert the quote to an invoice when it is accepted; correct a sent invoice properly with a credit note.
- **Invoice Ledger** – every invoice for a chosen month with totals, and an Excel export for your bookkeeper or accountant.
- **iCloud sync** – use the same data on your iPad and iPhone.
- **Backup and restore** – a single backup file you can save to Files or email to yourself.

Where your data lives

Everything is stored in a database on the device itself, so the app works without an internet connection. When iCloud sync is switched on, the same data is also kept in your private iCloud storage and copied to your other devices signed in with the same Apple account. Nobody else can see it, and it is never sent anywhere other than Apple's iCloud.

> *i* **Tip.** Even with iCloud on, take an occasional backup from Settings (see section 12). A backup is a file you control and can keep anywhere.

The four tabs

The app is organised into four tabs. On iPad they sit in a bar at the side; on iPhone they are along the bottom of the screen.

Tab	What it is for

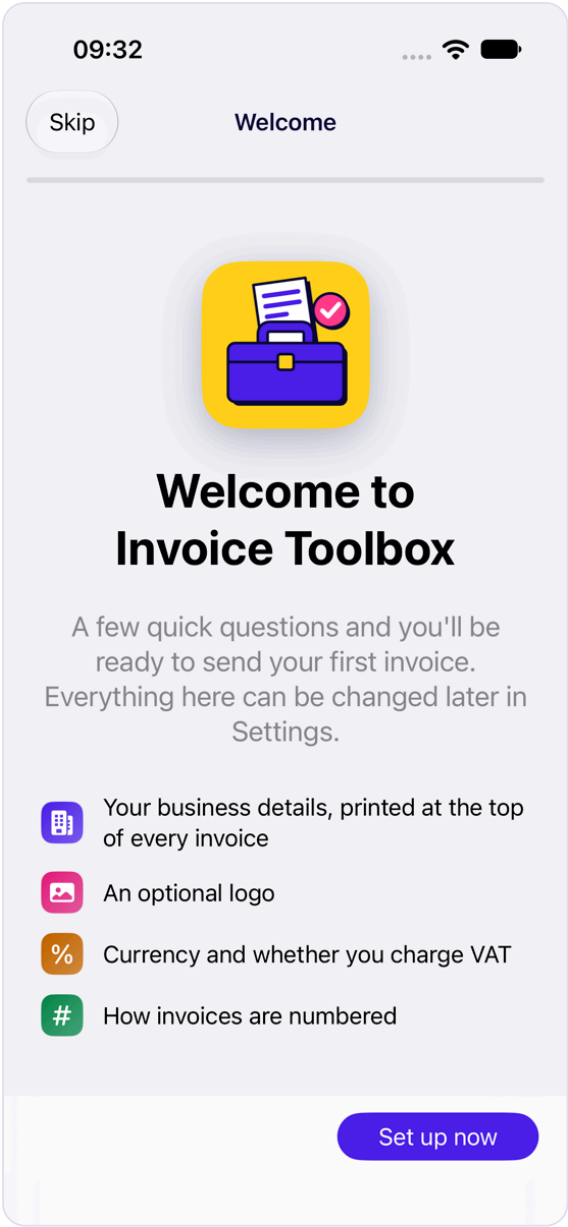
Home	A dashboard: sales by month for the last twelve months, total monies owed (tap for the aged debtors list) and payments received this month (tap for the payments list). Both lists export to Excel.
Customers	Your customer list. Tap a customer to see their invoices and to create new ones.
Invoice Ledger	All invoices for a month and year, with totals, and the Excel export.
Settings	Your business details, logo, currency and tax, invoice options, iCloud, and backup & restore.

2 Getting started

The first time you open Invoice Toolbox on a device that has no customers and no business details, a short **setup wizard** appears. It asks for everything the app needs to print a proper invoice. Each step is optional apart from your business name, and everything can be changed later in Settings.

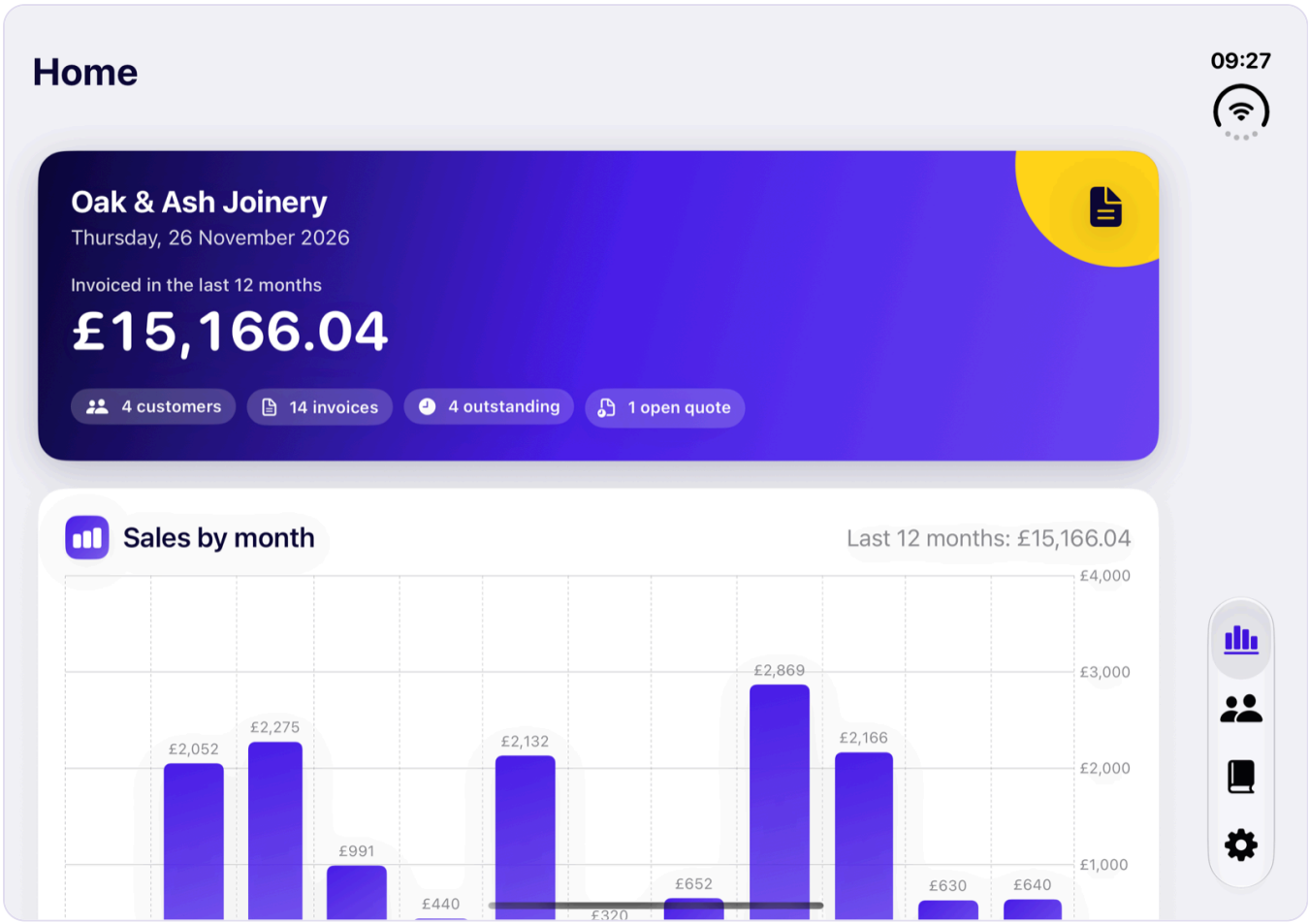
1. **Welcome** – tap **Set up now**. If you already use the app on another device with the same iCloud account, tap Skip instead; your customers and invoices will arrive by themselves once they have synced.
2. **Your business** – business name (required), address, telephone and email. These are printed at the top of every invoice.
3. **Logo** – optionally choose a logo from Photos or Files. A PNG with a transparent background looks best. You can skip this for now.
4. **Currency and tax** – pick the currency you invoice in, name your tax (VAT, Sales Tax, GST…), and say whether you are registered and charge it. If you are, enter the rate and your registration number.
5. **Invoicing** – choose whether invoice lines show a quantity column, set an optional invoice number prefix for this device, decide whether to sync with iCloud, and type a footer (payment terms and bank details usually go here).
6. **All set** – a summary of your choices. Tap **Start using Invoice Toolbox**.

✓ **Next step.** Add your first customer from the Customers tab, then create an invoice from their page. Section 4 and section 5 walk through both.



The setup wizard opens the first time you run the app.

3 Home



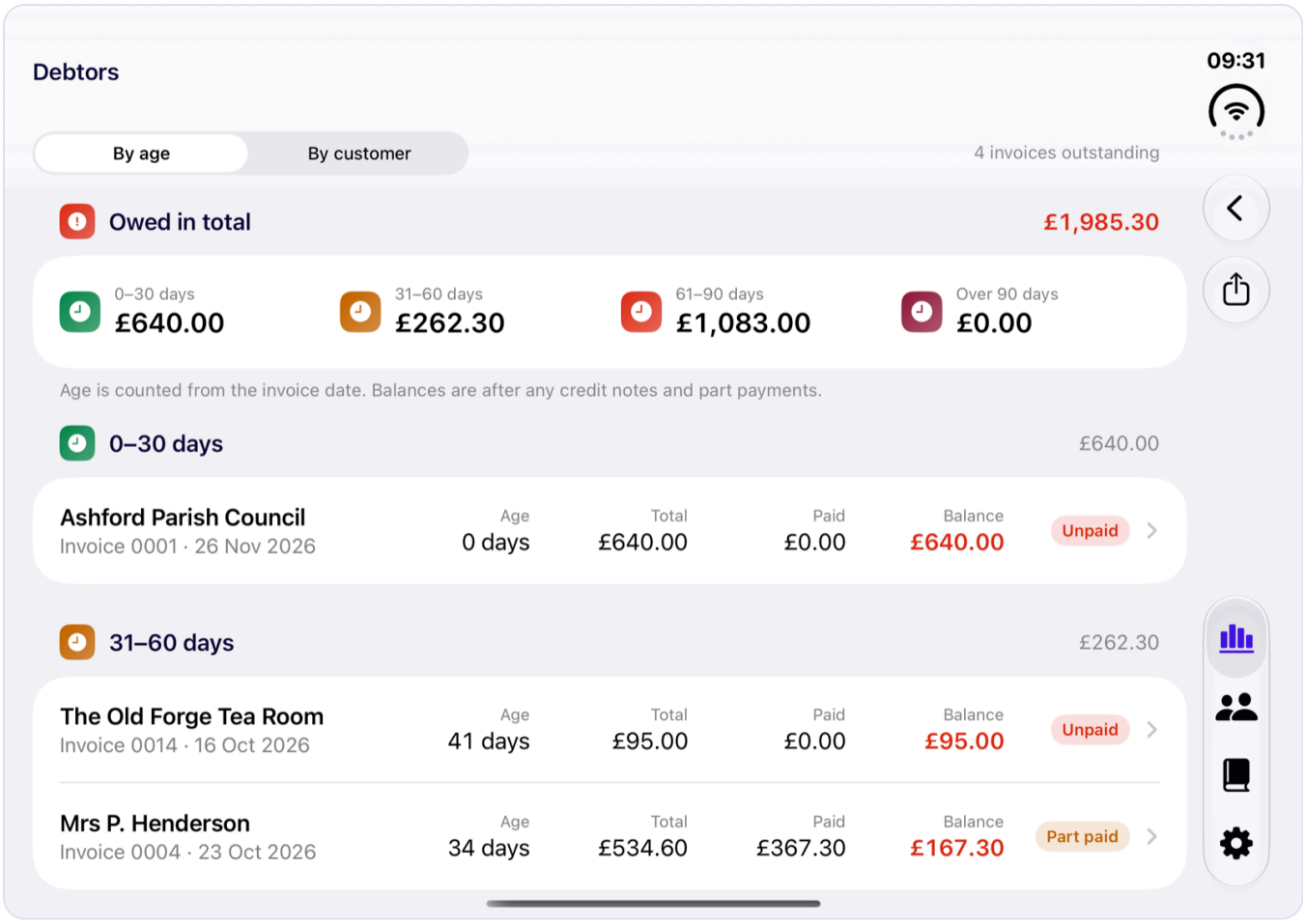
Home on iPad: the headline banner, the sales chart, and the two summary cards below it.

Home is a read-only overview. Nothing here needs filling in; it is calculated from your invoices and payments.

- **Banner** – your business name, today's date, the total invoiced over the last twelve months, and counts of customers, invoices and invoices still outstanding.
- **Sales by month** – a bar for each of the last twelve months showing the total value of invoices dated in that month. On iPad each bar is labelled with its value; on iPhone the month names stand upright so they stay readable.
- **Monies owed** – the total balance still unpaid across every invoice, with the number of outstanding invoices. It is red when something is owed and green when everything is paid. Tap the card to open the **Debtors** list.
- **Received this month** – payments recorded with a date in the current month, with the value invoiced this month underneath. Tap the card to open the **Payments received** list.

> *i* **Draft invoices** (invoices with no lines yet) are ignored by the Monies owed figure, so an invoice you have started but not finished does not show as owed.

Debtors



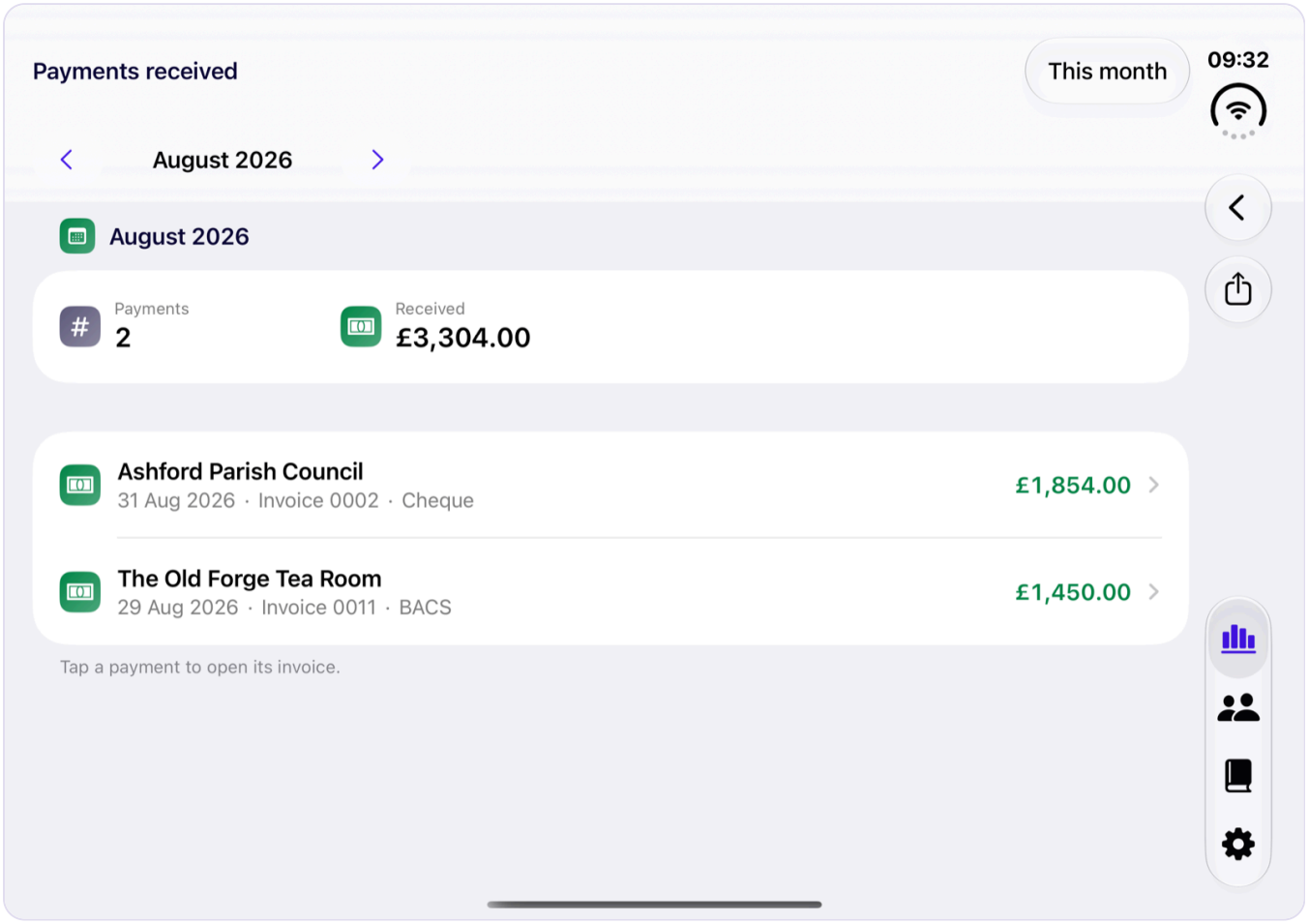
The Debtors list grouped by age. The summary at the top splits what is owed into the four age bands.

Tap **Monies owed** on Home to see exactly who owes you money and for how long. The list shows every invoice with a balance still outstanding, oldest first.

- **Age** is the number of days since the invoice date. The summary at the top totals what is owed in four bands: **0–30 days**, **31–60 days**, **61–90 days** and **over 90 days**, so you can see at a glance how much is seriously overdue.
- **By age / By customer** switches between grouping the invoices into those age bands and grouping them under each customer with the customer's total.
- Each row shows the invoice number and date, its age, the invoice total, what has been paid or credited so far, and the **balance** still owed, with the invoice's status badge. When the screen is narrower (an iPad held upright) the Paid column is left out, and on iPhone the row is condensed to the essentials.
- Tap a row to open the invoice, for example to record a payment or print a copy to chase.
- The **Export** button (top right) writes the list to an Excel workbook named *InvoiceToolbox-Debtors-[date].xlsx* and opens the share sheet. It has two sheets: **Debtors**, one row per outstanding invoice with its age, age band, total, credited, paid and balance; and **By customer**, each customer's total owed split across the four age bands.

✓ **Chasing payment.** Group by customer, open the overdue invoice and use Print / Share to send the PDF again, or export the list and send the **By customer** sheet to whoever does your credit control.

Payments received



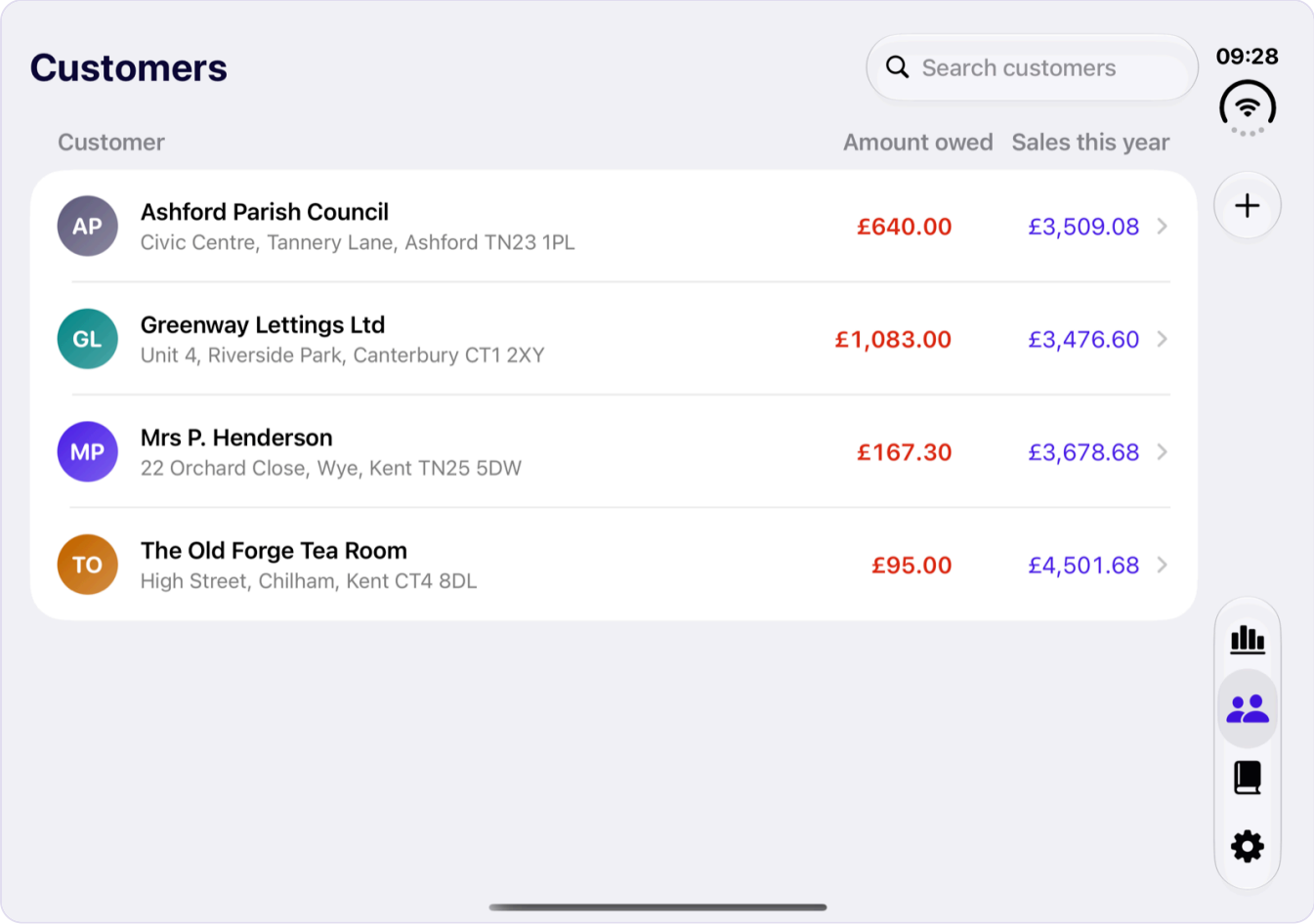
Payments received for a month, newest first. The arrows step to other months.

Tap **Received this month** on Home to see every payment that makes up the figure. The list opens on the current month and shows each payment with its date, the customer, the invoice it was recorded against and the note you entered (for example "BACS" or "Deposit").

- Use the **<** and **>** arrows above the list to step back through earlier months, and **This month** to jump back to today.
- The summary counts the payments and totals the money received. If any **refunds** were given in the month they are listed in pink, totalled separately, and the **Net** figure shows received less refunded.
- Tap a payment to open its invoice.
- The **Export** button writes the month to an Excel workbook named *InvoiceToolbox-Payments-[month].xlsx* with a Date, Customer, Invoice No, Type (Payment or Refund), Amount and Note column, and opens the share sheet.

i **Which month a payment belongs to** is decided by the **date received** you entered when recording it, not by the invoice date. The Invoice Ledger export also includes a Payments sheet if you need payments for a wider date range.

4 Customers



The customer list shows what each customer owes and what they have bought this year.

Adding a customer

1. Tap `+` at the top of the Customers tab.
2. Enter the customer's name, address (as many lines as you like), telephone and email address. Only the name is required.
3. Tap `Save`.

The address, telephone and email are printed in the "Invoice to" block on the PDF, so it is worth entering them in full.

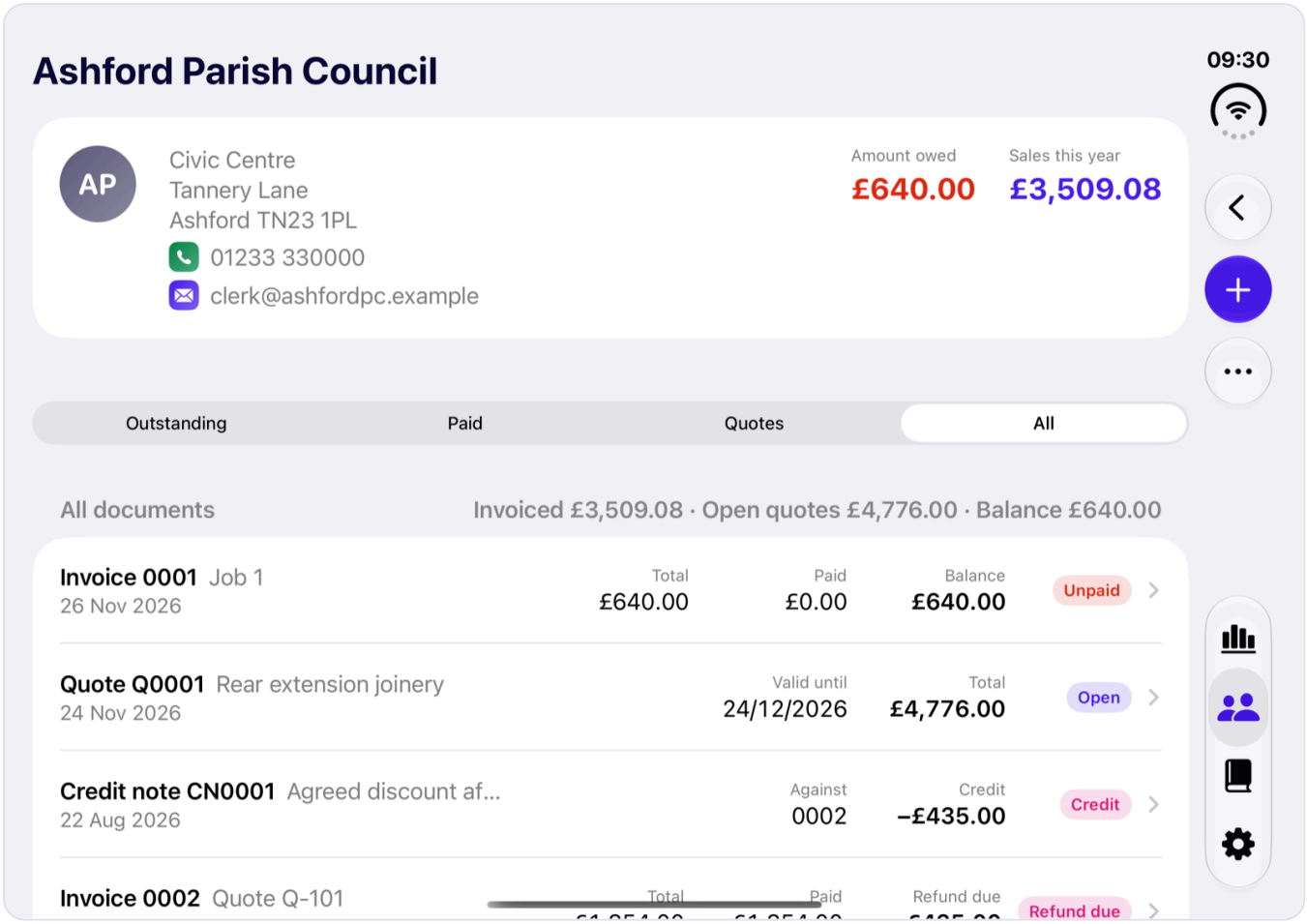
Finding and editing a customer

Use the **search field** at the top of the list to filter by name, address or email. To change a customer's details, open the customer and choose **Edit Customer** from the `…` menu in the top corner.

Deleting a customer

Swipe a customer to the left in the list and tap **Delete**. You are asked to confirm, because deleting a customer also deletes every invoice and payment recorded against them.

The customer page



A customer's page: contact details, totals, and their invoices filtered by status.

- The header shows the customer's contact details, the **amount owed** and **sales this year**.
- The **Outstanding / Paid / Quotes / All** switch filters the list. Figures for the documents shown appear above the list (explained below).
- Tap + and choose **New Invoice** (section 5), **New Quote** or **New Credit Note** (section 8).
- Tap an invoice to open it. Swipe it **right** to copy it, or **left** to delete it (section 7).

What the figures mean

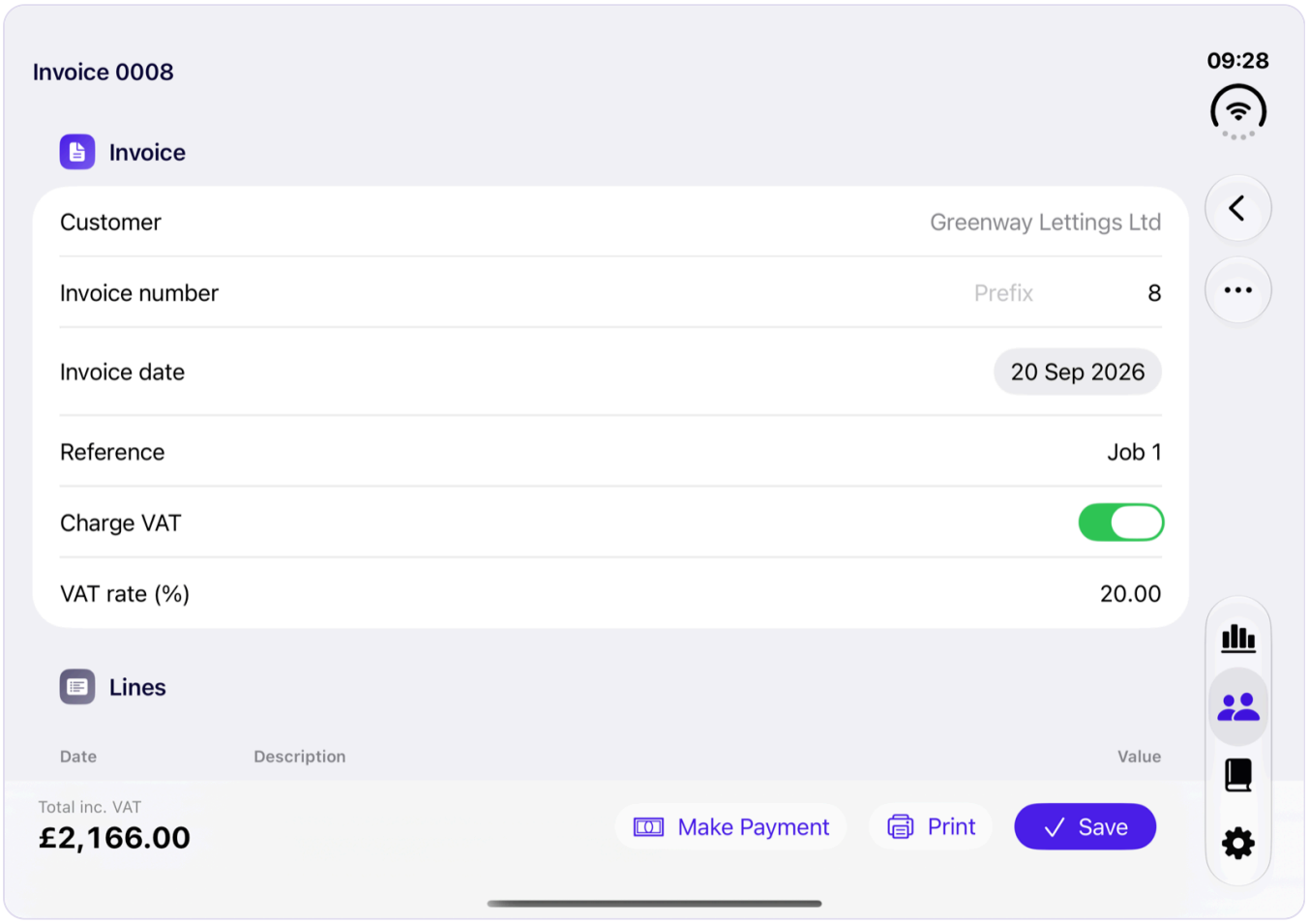
Figure	How it is worked out
Amount owed (header)	What the customer still has to pay across all their invoices: each invoice's total, less any credit notes against it, less payments received. Only invoices that still have something outstanding count; quotes never do.

Sales this year (header)	Invoices dated this calendar year, less credit notes dated this year. Quotes are not sales until they become invoices.
Total (Outstanding and Paid lists)	The value of the invoices shown, net of credit notes.
Balance	The unpaid part of the invoices shown: the same calculation as Amount owed, restricted to the list in front of you. An invoice that has gone into Refund due adds nothing here; the refund is shown on the invoice itself.
Invoiced and **Open quotes** (All list)	Kept apart on purpose. Invoiced is the invoices less credit notes; Open quotes is the value of quotes that have not yet been invoiced or declined. A quote that has become an invoice is counted once, as the invoice, so the two figures never double up.
Quoted and **Still open** (Quotes list)	Quoted is every quote in the list; Still open is those awaiting an answer. On iPhone these list figures are left out to save space, but the header figures are always shown.

5 Invoices

Creating an invoice

Open the customer, tap + and choose **New Invoice**. A new invoice is created with the next number in sequence and today's date, and the editor opens. On iPhone the first line's entry form opens straight away; on iPad you type the first line directly into the table.



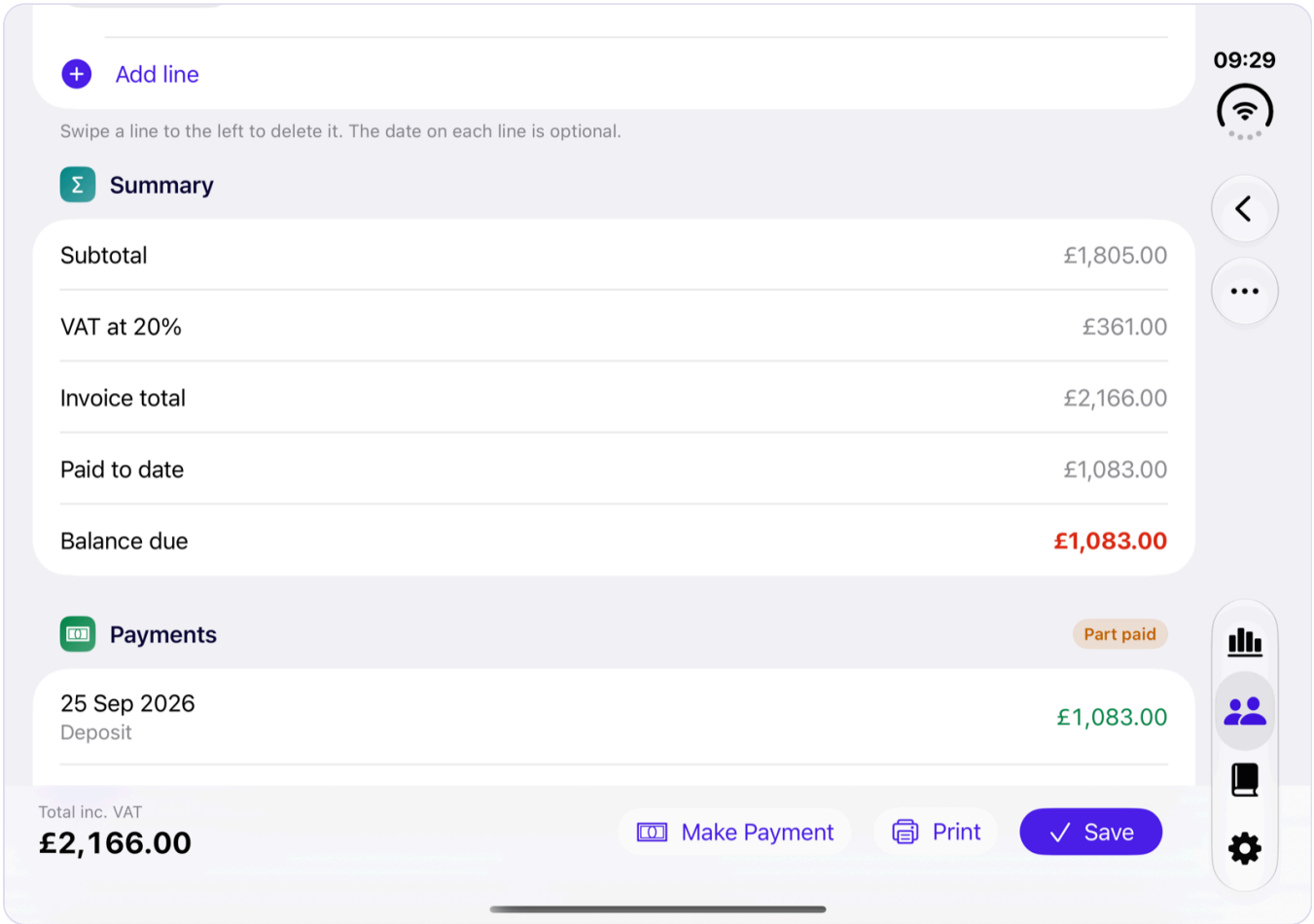
The top of the invoice editor on iPad.

The Invoice section

Field	Notes
Customer	Set when the invoice is created and cannot be changed afterwards.
Invoice number	Given automatically. There are two boxes: an optional **prefix** (for example "A") and the **number**. You can change either, but an invoice number already sent to a customer should be left alone. If the number is already used by another invoice, a warning appears under the field.

Invoice date	Defaults to today. Tap it to pick another date. The date decides which month the invoice appears in on Home and in the Ledger.
Reference	Optional free text such as a job name, quote number or purchase order. Printed on the invoice.
Charge VAT	Follows the default in Settings for new invoices, but each invoice has its own switch and **rate**, so changing the rate later never alters old invoices. The label uses whatever tax name you chose in Settings.

Lines



Lines, with the Summary and then the Payments section underneath.

Each line has:

- **Date** – optional. Tap the date button to set one; leave it as "No date" if the line does not need one. Useful when one invoice covers work on several days.
- **Description** – can be as long as you like and can run to several lines. Press Return to start a new line within the description.
- **Value** – the amount for the line, entered without a currency symbol. With the **quantity column** switched on in Settings, you enter a quantity and a unit price instead and the line value is worked out for you.

Tap Add line to add another. To remove a line, swipe it to the left. Blank lines are ignored when the invoice is printed.

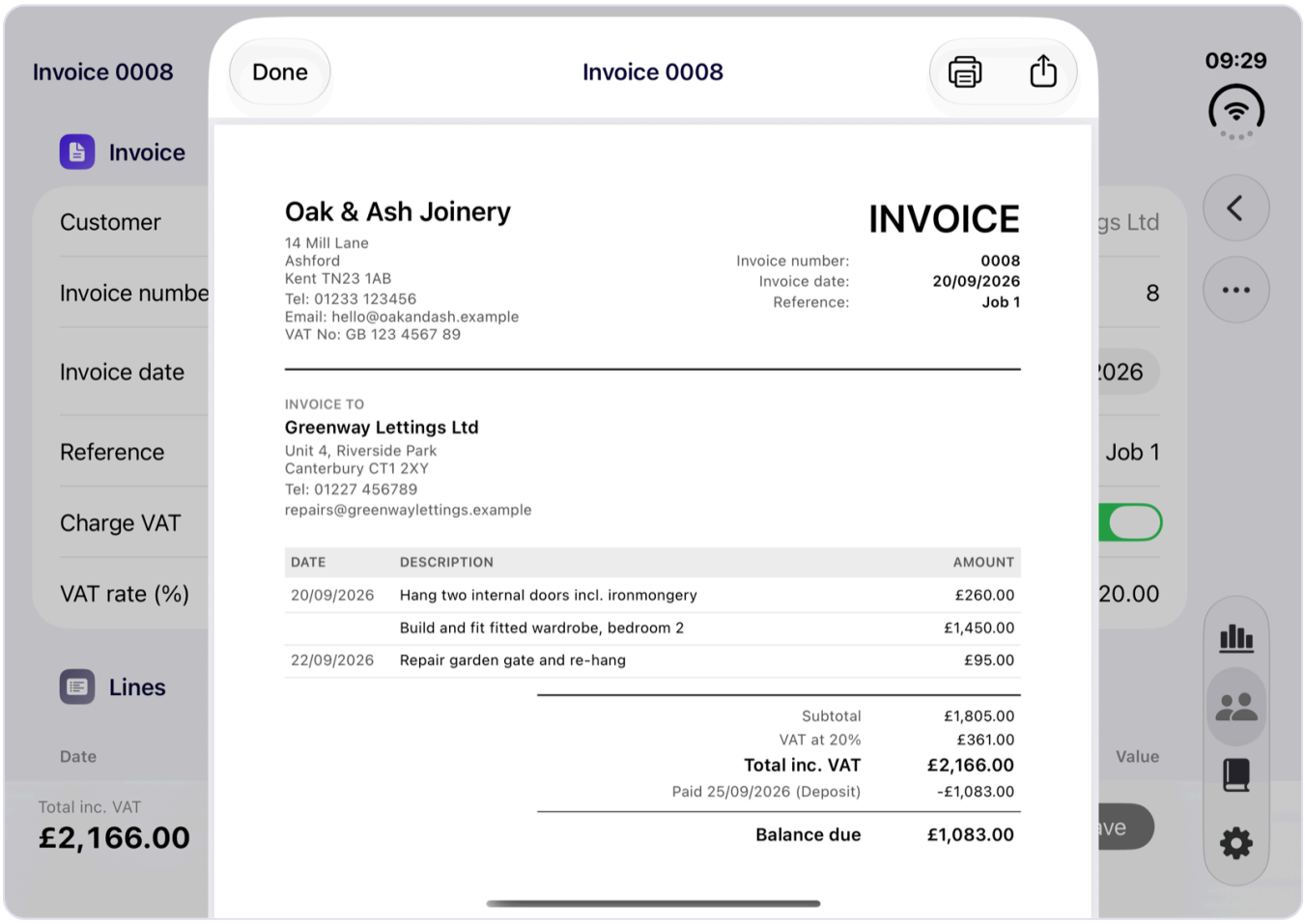
> *i* **On iPhone** lines are entered in a full-screen form rather than in a table. Tap a line to edit it, or Add line to create one, and use Save and add another for quick entry of several lines. See section 13.

Summary and saving

The **Summary** section under the lines shows the subtotal, tax, invoice total, any credit notes, paid to date and balance due, with the **Payments** section beneath it. The running total is also always visible in the bar at the bottom of the screen next to the Save button. Changes are kept as you type; **Save** confirms them and takes you back to the customer's page.

> ! **Status.** An invoice with no lines is a Draft. Once it has a value it becomes Unpaid, then Part paid or Paid as payments are recorded.

Printing, saving and emailing the invoice

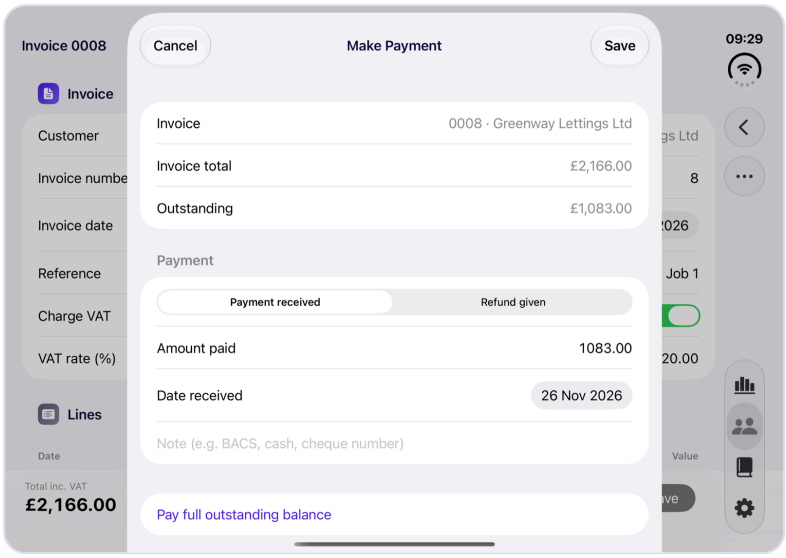


The PDF preview. Use the printer button to AirPrint, or the share button to email or save it.

1. Tap Print in the bar at the bottom of the editor. The app builds a PDF, on A4 or US Letter paper depending on your region (see Settings › Paper), and shows a preview.
2. To print on an AirPrint printer, tap the **printer** button.
3. To email it, save it to Files, AirDrop it or send it by Messages or WhatsApp, tap the **share** button and choose the app. The file is named after the invoice number and customer, for example *Invoice-0008-Greenway Lettings Ltd.pdf*.
4. Tap Done to return to the editor.

The PDF includes your business name, address, telephone, email and tax registration number, your logo if you have added one, the customer's details, every line with its date, the subtotal, tax and total, any payments already received with the balance due, and your footer text. Long invoices run on to further pages automatically.

6 Payments



Recording a payment.

When a customer pays, open the invoice and tap Make Payment (in the bottom bar, or in the Payments section). Enter:

- **Amount paid** – defaults to the outstanding balance. Enter a smaller amount for a deposit or part payment, or tap Pay full outstanding balance to fill in the balance.
- **Date received** – defaults to today. This date decides which month the payment counts towards in "Received this month" on Home.
- **Note** – optional, for example "BACS", "Cash" or a cheque number. Printed against the payment on the PDF.

Tap Save. You can record as many payments as you need against one invoice; the Payments section lists them all and the balance updates each time. To remove a payment entered by mistake, swipe it to the left in the Payments section.

> ✓ **Deposits.** Record a deposit as a payment as soon as you receive it. The invoice then shows as Part paid, and the printed invoice lists the deposit and the balance still due.

7 Copying and deleting invoices

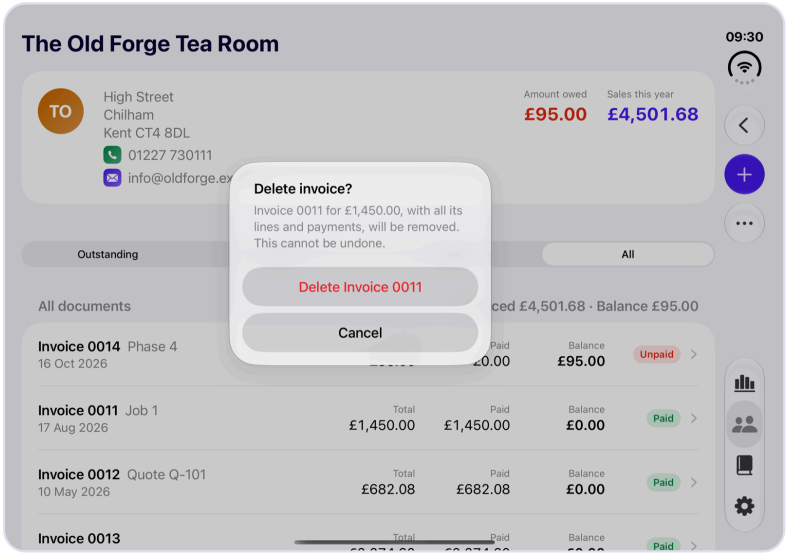
Copying an invoice

For repeat work, copy an existing invoice rather than typing it again. Either:

- swipe the invoice to the **right** on the customer's page or in the Ledger and tap **Copy**, or
- touch and hold it and choose **Copy Invoice**, or
- open it and choose **Copy Invoice** from the … menu.

The copy gets the next invoice number, today's date, the same reference and tax setting, and the same lines (without their line dates). It has no payments. The copy opens in the editor so you can adjust it.

Deleting an invoice



Deleting always asks you to confirm.

To delete an invoice, do one of the following:

- swipe it to the **left** on the customer's page or in the Ledger and tap **Delete**;
- open it and tap **Delete Invoice** at the bottom of the editor, or choose it from the … menu.

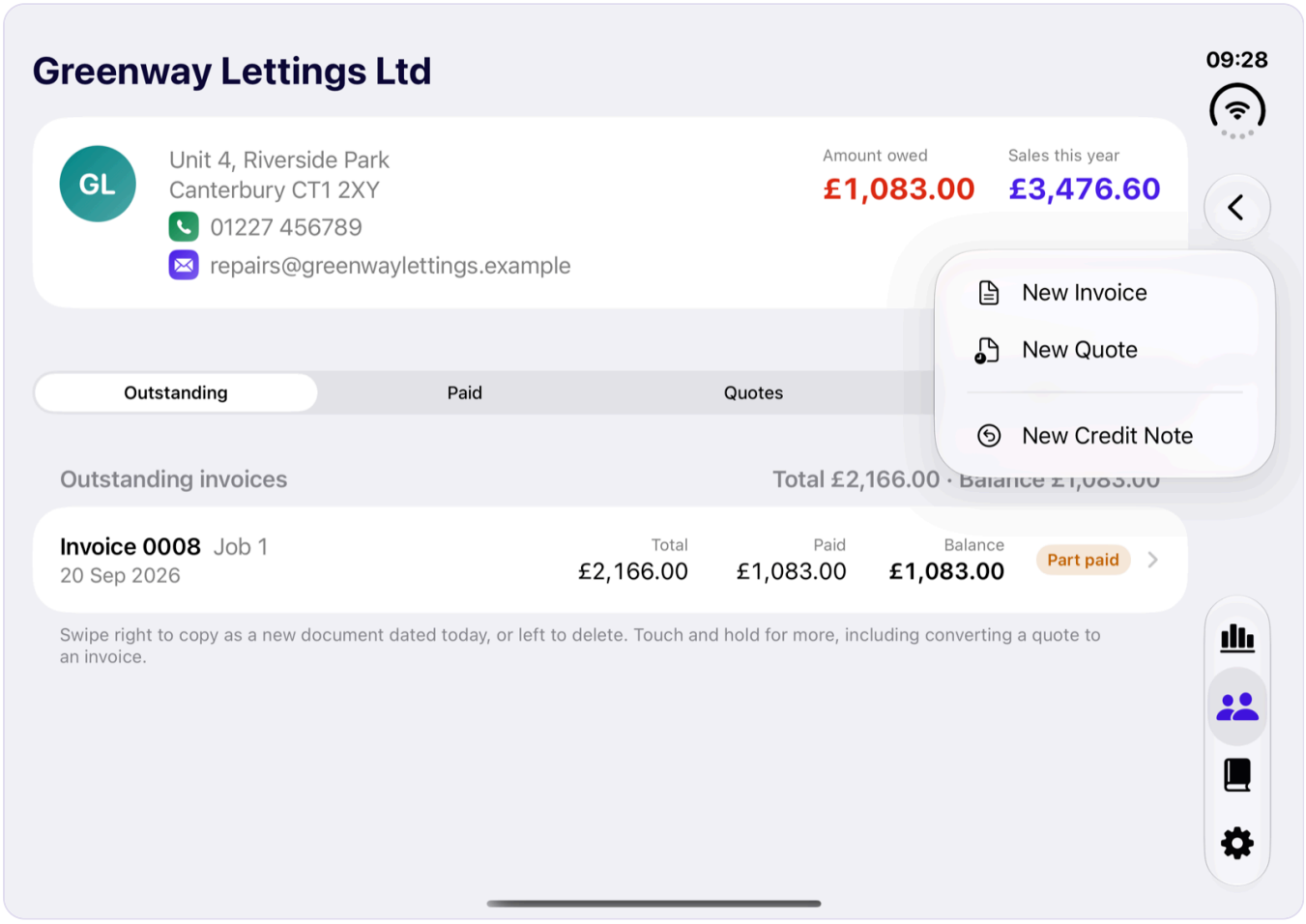
A confirmation shows the invoice number and value. Deleting removes the invoice together with all its lines and payments, and it cannot be undone.

> ! **Numbers are not reused.** Deleting invoice 0012 does not move later invoices down, and the next new invoice will still be numbered after the highest one that exists. This keeps your numbering consistent with what customers have already received.

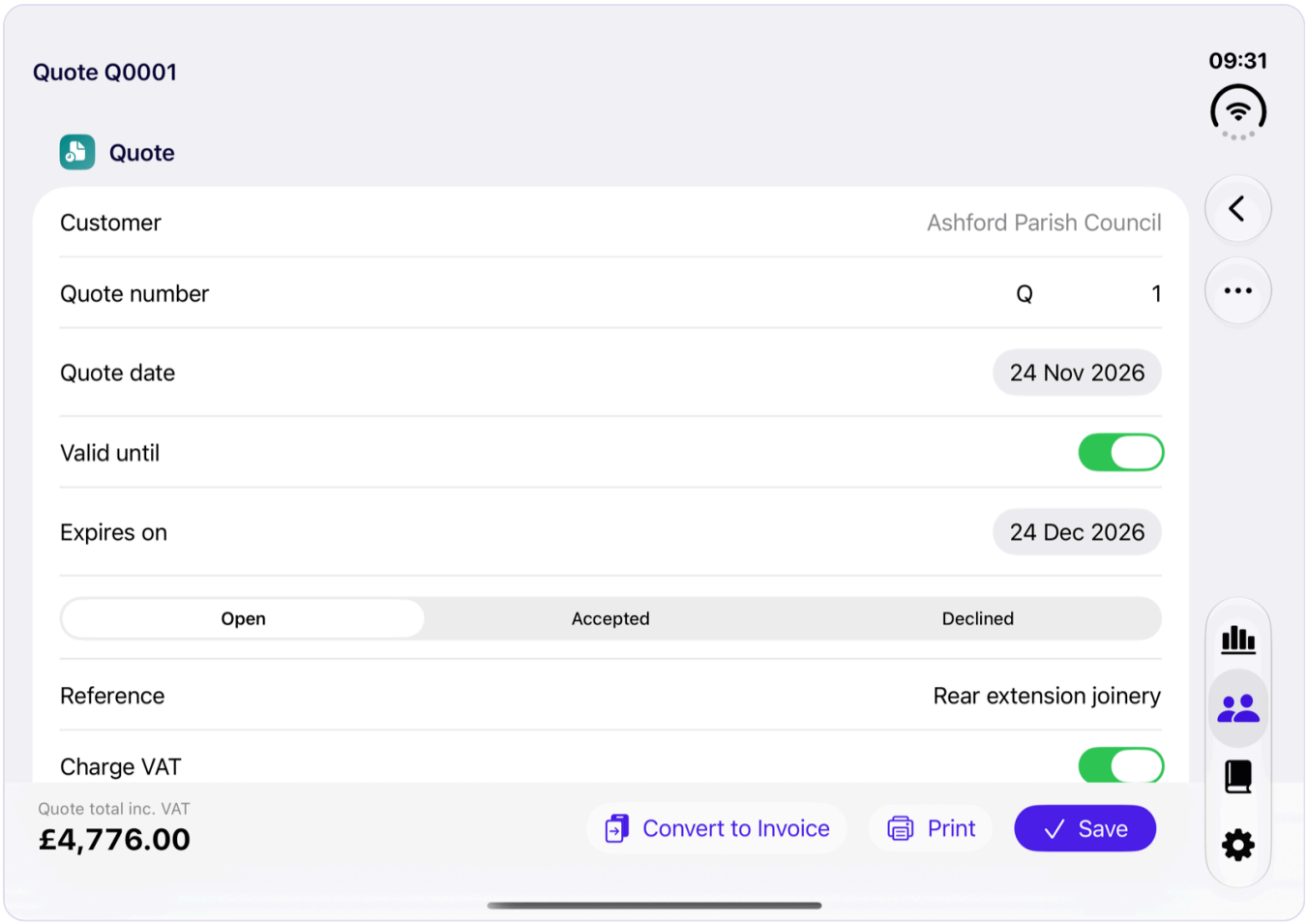
8 Quotes and credit notes

Quotes price a job before you start it; credit notes correct an invoice after it has been sent. Both are documents in their own right with their own numbers and their own PDF, and both sit alongside the invoices on the customer's page.

Quotes (or estimates)



The + button on a customer's page offers New Invoice, New Quote and New Credit Note.



A quote: its own number series, a valid-until date, a status, and a Convert to Invoice button.

1. Open the customer, tap + and choose **New Quote** (or New Estimate, depending on your setting).
2. Enter the lines exactly as you would on an invoice. Quotes are numbered in their own series, Q0001, Q0002 and so on, so they never use up invoice numbers.
3. Leave **Valid until** on and adjust the date if you want the price to stand for a different length of time. The default length is set in Settings › Quotes.
4. Tap Print to produce the PDF, headed QUOTE (or ESTIMATE), with the valid-until date printed under the totals. Send it exactly as you would an invoice.

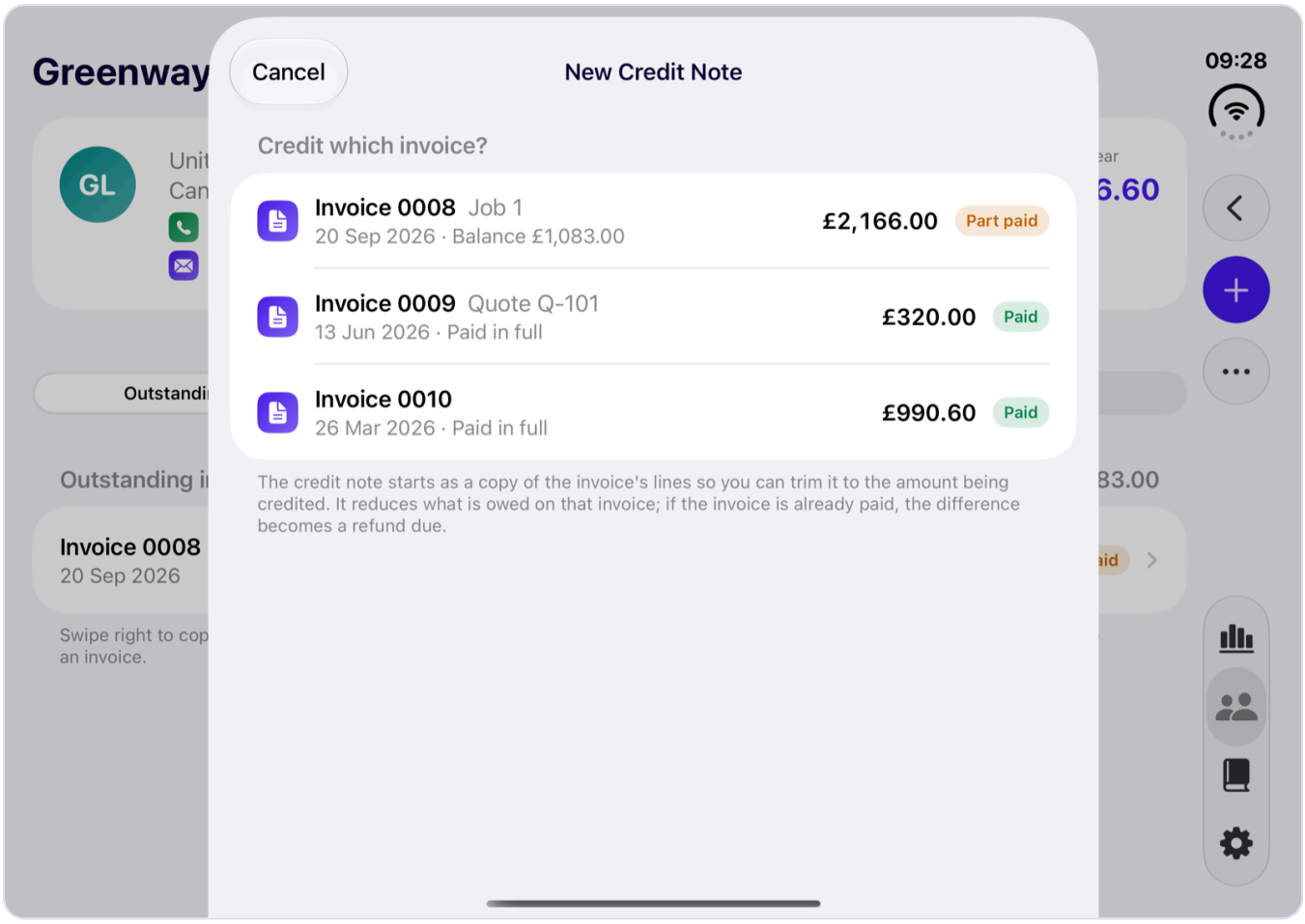
When the customer answers, set the **status** switch to Accepted or Declined. An open quote whose date has passed shows as Expired by itself. Quotes never count towards sales, the chart, or amounts owed.

Turning a quote into an invoice

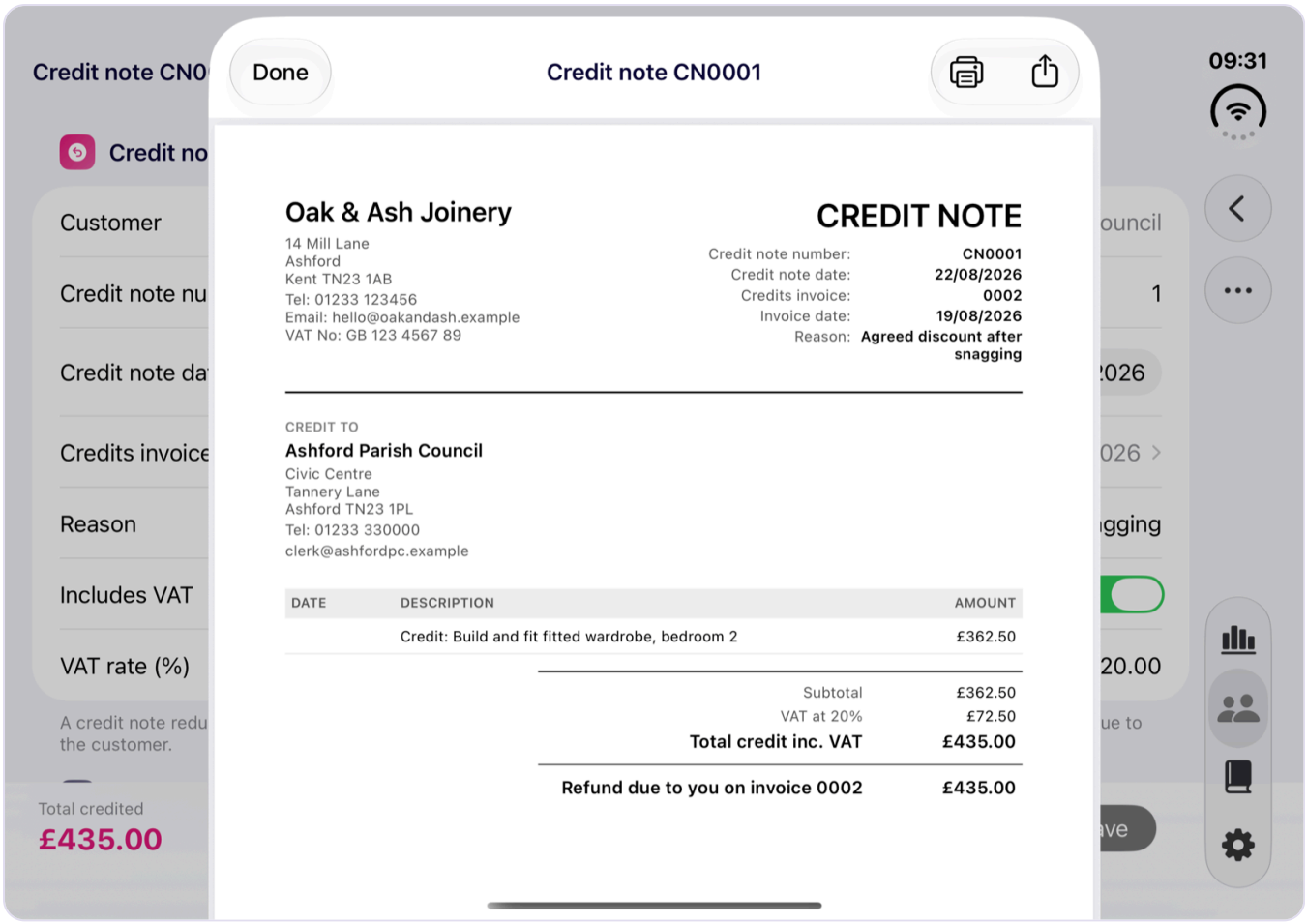
Tap **Convert to Invoice** in the bar at the bottom of the quote, or choose it from the … menu, or touch and hold the quote in a list. A new invoice dated today is created with the same lines and the next invoice number, the quote is marked Accepted and shows as Invoiced, and each document links to the other. Edit the invoice as normal; the quote is left as a record of what was offered.

> *i* **Quotes or estimates?** Settings › Quotes lets you call them either. The word changes everywhere in the app and on the PDF; nothing else differs.

Credit notes



New Credit Note from the + button asks which invoice is being credited.



A credit note PDF: it names the invoice it credits and shows the balance or refund now due.

Once an invoice has been sent, do not edit or delete it to reduce the amount. Issue a credit note instead: it is what your accountant and HMRC expect, it leaves the original invoice untouched, and it gives the customer a document for the reduction.

1. On the customer's page tap `+`, choose **New Credit Note**, and pick the invoice being credited. (Touching and holding an invoice in a list offers the same thing.)
2. The credit note opens with a copy of the invoice's lines, which is a full credit. Delete the lines that stand, or change the values, until the total is the amount you are crediting. Enter a **Reason**; it is printed on the PDF.
3. Tap `Print` for the PDF, headed CREDIT NOTE, then `Save`.

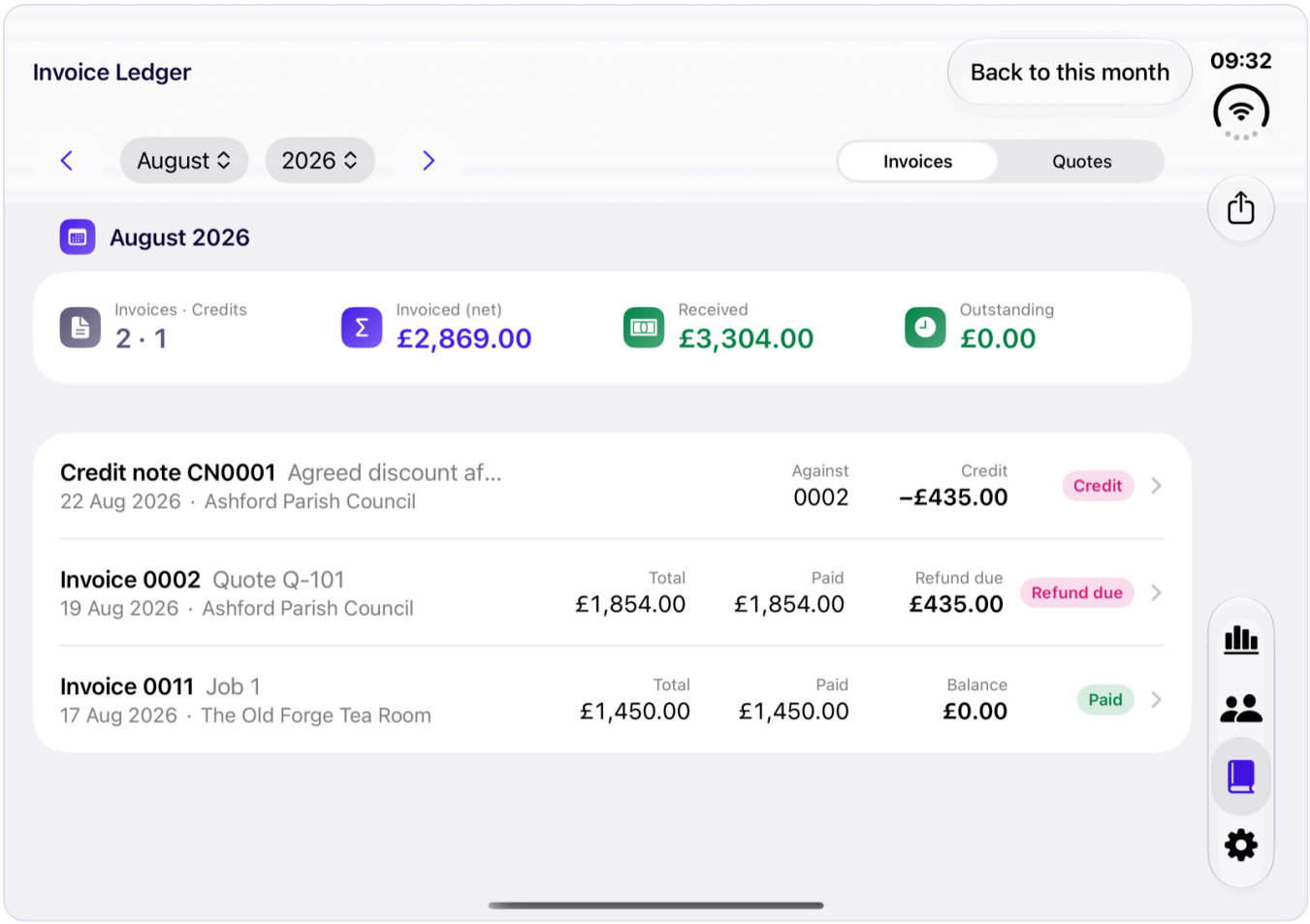
Credit notes have their own series, CN0001, CN0002 and so on, and tax is worked out the same way as on the invoice. The credit comes straight off the invoice: an unpaid invoice now owes less, and a paid invoice goes to `Refund due`. When you pay the money back, open the invoice, tap `Make Payment`, choose **Refund given** and enter the amount; the invoice returns to Paid.

- The credited invoice's Summary shows a "Less credit note" line with the credit note's number, so the balance always adds up.
- The Ledger shows credit notes as negative amounts and the month's invoiced figure net of them; the Excel export does the same, with a Type column.

- Deleting an invoice also deletes its credit notes. Deleting a credit note puts the amount back on the invoice.

! **Credit, do not edit.** If you change a sent invoice instead of crediting it, your copy no longer matches the customer's and your VAT records disagree with theirs. A credit note keeps both sides straight.

9 Invoice Ledger



The Ledger for one month, with its totals and the invoices dated in it.

The Ledger lists every invoice dated in a chosen month, for all customers, with four totals: the number of invoices, the value invoiced, the amount received against them, and the amount outstanding.

- Choose the **month** and **year** from the two menus, or step through months with the < and > buttons.
- When you are looking at a different month, a Back to this month button appears in the top corner.
- Tap an invoice to open it. Swipe right to copy it or left to delete it, exactly as on the customer's page.

Exporting to Excel

Tap the **share** button in the top corner of the Ledger and choose:

- **Export [month] to Excel** – the month currently shown; or
- **Export date range to Excel…** – pick any from and to dates. Shortcut buttons fill in this month, last month, the last three months, this year, or the last tax year. That last button follows your device's region: 6 April to 5 April in the UK, 1 July to 30 June in Australia, 1 April to 31 March in New Zealand and India, and simply last calendar year where the tax year is the calendar year, as in the US, Canada and Ireland; or

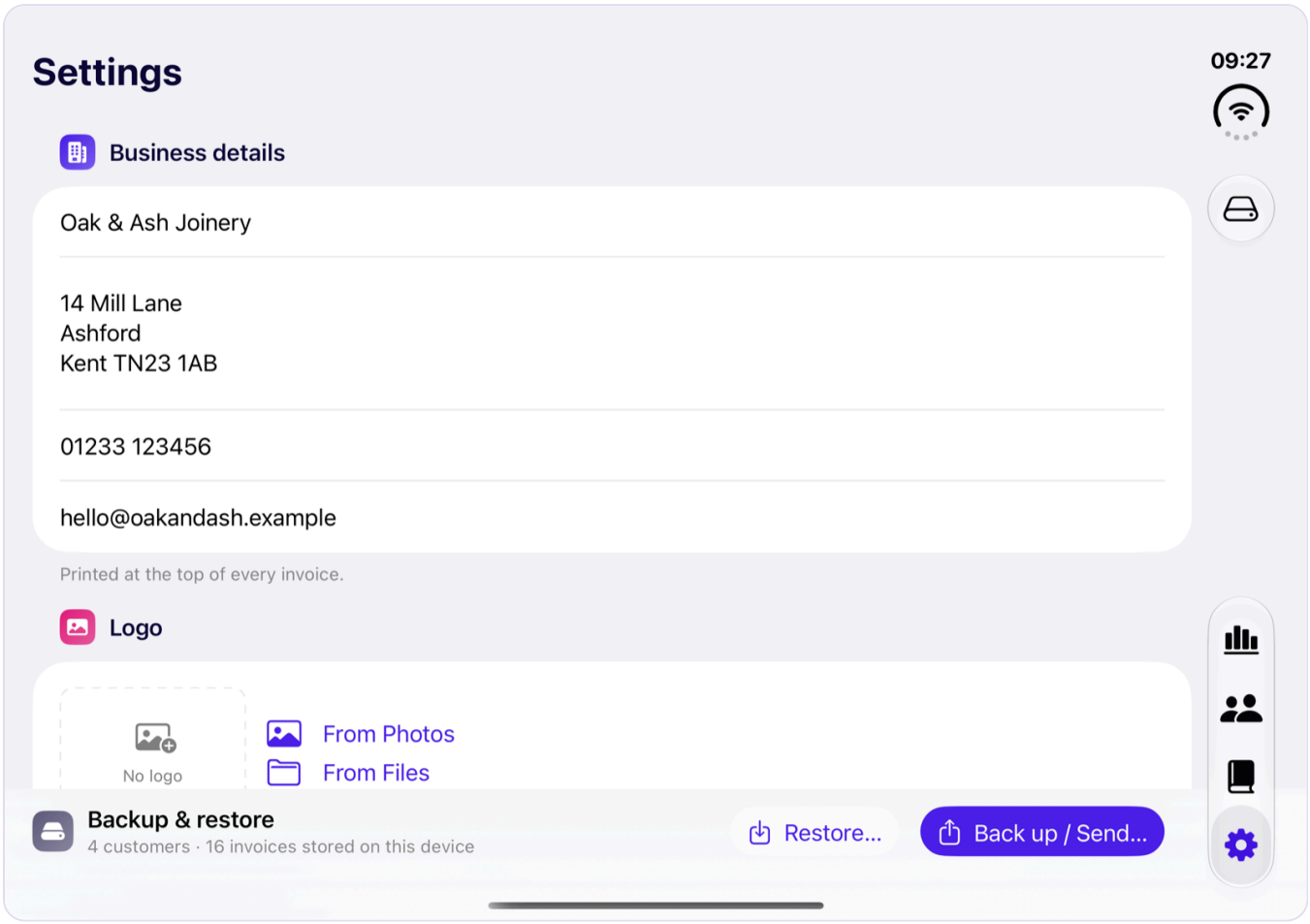
- **Export debtors to Excel** – the aged debtors workbook, the same file the Debtors screen on Home exports (see section 3). It covers every invoice still owed, whatever its date, so it is independent of the month shown.

The month and date range exports are an **.xlsx** workbook that opens in Excel, Numbers or Google Sheets. The share sheet lets you save it to Files, email it, or open it straight into another app. It contains three sheets:

Sheet	Contents
Invoices	One row per invoice: number, date, customer, reference, subtotal, tax, total, paid, balance and status, with a totals row.
Lines	Every invoice line in the range with its date, description, quantity (if used) and value.
Payments	Every payment received against those invoices, with date and note.

Amounts are real numbers formatted in your currency, so you can add them up in the spreadsheet.

10 Settings



Settings. Backup & restore stays pinned at the bottom.

Changes in Settings are saved as you make them; there is no Save button.

Business details

Your business name, address, telephone and email, printed at the top of every invoice.

Logo

Choose a logo **From Photos** or **From Files** (PNG or JPEG). It is printed in the top-left corner of the invoice beside your business name. Tap **Remove** to clear it. A PNG with a transparent background looks best.

Currency and tax

Pick the **currency** you invoice in (pounds, euros, US dollars and so on). Amounts everywhere, on the PDF and in Excel, use that currency, formatted in the style of your device's region. The **tax name** is free text: VAT, Sales Tax, GST or anything else. The calculation is the same whatever it is called.

VAT (or your tax name)

Charge … on new invoices sets the default for invoices you create from now on; each invoice can still be switched individually. Enter the **rate** (for example 20) and your **registration number**, which is printed under

your address on the invoice.

Invoice lines

Show quantity column is off by default. When on, each invoice line has a quantity and a unit price, and the value is quantity × price. Leave it off if you simply enter a value per line.

Paper

Paper size sets the page that invoices, quotes and credit notes are laid out on. **Automatic** uses US Letter in the United States, Canada and the other Letter countries, and A4 everywhere else, based on the region set on this device. Choose **A4** or **US Letter** to fix it yourself. The choice is kept on each device rather than synced, because it describes the printer you are standing next to.

Quotes (or Estimates)

Call them switches between "Quotes" and "Estimates". The word changes everywhere in the app, on the customer page filter, in the Ledger, and as the heading of the PDF. **Valid for** sets how many days ahead a new quote's valid-until date is placed; set it to "No expiry" if you do not want a date added automatically. Each quote's date can still be changed on the quote itself.

Invoice footer

Multi-line text printed at the bottom of each invoice. Payment terms, bank account details and a thank-you usually go here.

Invoice numbering

Invoice numbers run in sequence (0001, 0002 …) within a **prefix**. The prefix belongs to this device only and is not synced. If you create invoices on more than one device, give each its own prefix, for example A on the iPad and B on the iPhone, so the two can never produce the same number. The setting shows what the next invoice on this device will be called. See section 11.

iCloud

The **Sync with iCloud** switch and the current sync status. See section 11.

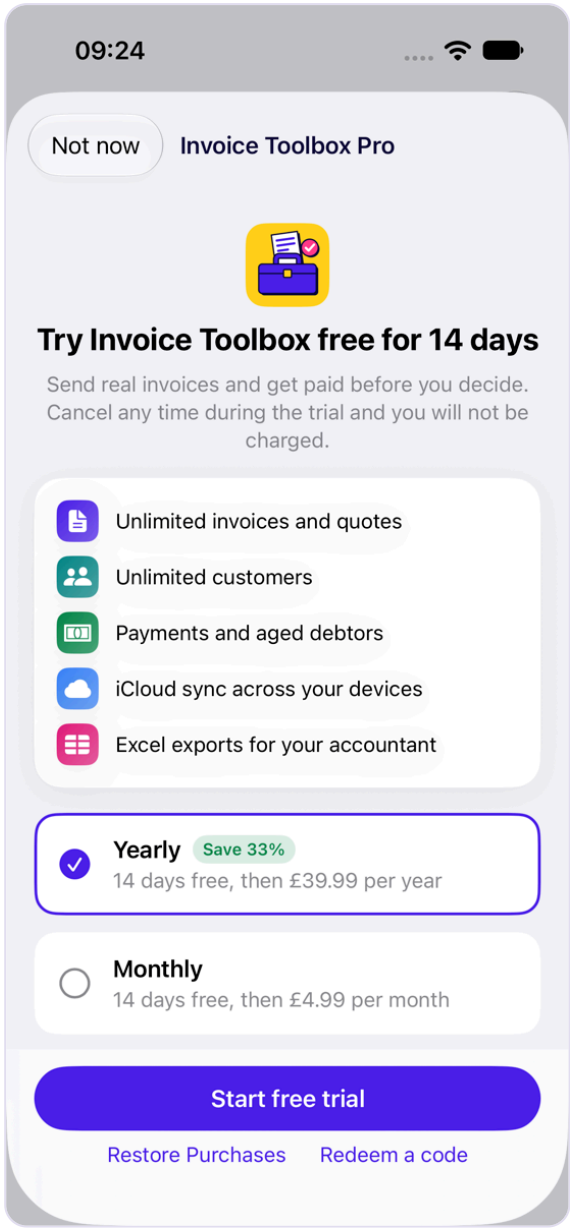
Subscription

Invoice Toolbox Pro is an auto-renewing subscription, monthly or yearly, with a **14-day free trial** for new subscribers. It covers everything that creates new work: adding customers, raising invoices, quotes and credit notes, copying or converting documents, and recording payments. Whatever you have already created stays fully available without a subscription: you can still open, print, email, export and back up every invoice.

- **Status** shows whether you are in the trial, subscribed and when the next payment is due, or not subscribed.
- **Start 14-day free trial** / **Subscribe** opens the plans. Choose monthly or yearly and confirm with Apple. Nothing is charged until the trial ends, and you can cancel during the trial at no cost.
- **Manage Subscription** opens your Apple Account's subscription page, where you can change plan or cancel. The app never takes card details itself.
- **Restore Purchases** brings an existing subscription across to a new device signed in with the same Apple Account.
- **Redeem a Code** is for an offer code you have been given, for example a free period. Enter it and Apple applies it to your subscription.

On the plans page, pick **Yearly** or **Monthly** and tap **Start free trial**. Apple then asks you to confirm with Face ID, Touch ID or your password. **Restore Purchases** and **Redeem a code** are underneath, and Not now closes the page without subscribing. The prices shown are for the UK; other countries see their own currency.

> *i* **When the trial ends** without a subscription, the app does not lock you out. The next time you tap New, Make Payment or Copy, the plans appear; everything else carries on working.



The plans appear when you start the trial, or when you create something without a subscription.

11 iCloud sync

With **Sync with iCloud** switched on (it is on by default) your customers, invoices, payments and business settings are kept in your private iCloud storage and appear on every iPad and iPhone signed in with the same Apple account. Changes made on one device reach the others within a few seconds to a few minutes, depending on the connection.

What you need

- Each device signed in to the same Apple account, with iCloud Drive enabled in the device's Settings.
- An internet connection on both devices at some point. The app itself works offline and catches up later.

Setting up a second device

1. Install Invoice Toolbox and open it. On the wizard's Welcome page tap Skip.
2. Give the device its own **invoice number prefix** in Settings › Invoice numbering (for example "B").
3. Wait for your data to appear. The Settings › iCloud section shows the sync status.

! **Why prefixes matter.** Each device numbers its own invoices. If two devices both created invoice 0012 while offline, you would have a clash. With different prefixes (A0012 and B0012) that cannot happen, and the app never renumbers an invoice automatically, so a number already given to a customer never changes. If a clash does occur, a warning banner appears on Home and the affected invoices can be renumbered by hand in their editor.

Turning sync off

Switch off **Sync with iCloud** in Settings and reopen the app. The data stays on the device; it simply stops being shared. Switching it back on uploads the local data again.

i If iCloud is unavailable (not signed in, iCloud Drive off, or the app has no network), the Settings › iCloud section says so and the app carries on using the local copy. Nothing is lost.

12 Backup and restore

The **Backup & restore** bar at the bottom of Settings shows how many customers and invoices are stored on the device.

Taking a backup

1. Tap **Back up / Send…**.
2. The app writes a single backup file (named *InvoiceToolbox-Backup-* followed by the date and time, ending in *.json*) and opens the share sheet.
3. Choose **Save to Files** to keep it in iCloud Drive or on the device, or **Mail** to email it to yourself.

The backup contains every customer, invoice, line and payment, your business settings and your logo.

Restoring a backup

1. Tap Restore… and pick the backup file in Files.
2. Read the confirmation carefully: it shows when the backup was taken and how many customers and invoices it holds.
3. Confirm. **Everything currently in the app is replaced** by the contents of the backup.

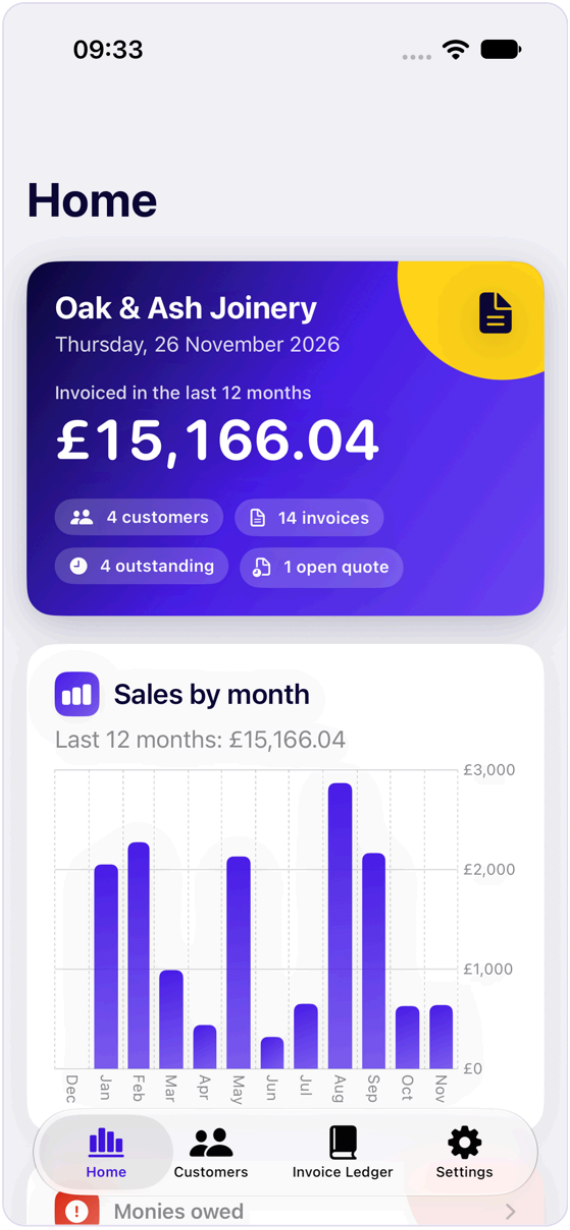
! **Restoring replaces, it does not merge.** If you restore onto a device that syncs with iCloud, the restored data is uploaded and replaces the data on your other devices too. Take a fresh backup first if you are unsure.

13 Using the app on iPhone

Everything in this manual works on iPhone as well as iPad, including the folding iPhone Duo. A few things are laid out differently to suit the narrower screen:

- The four tabs are along the **bottom** of the screen.
- Lists stack their information: the customer list shows "Owed" and "Sales this year" under each name rather than in columns, and invoice rows put the amounts beneath the title.
- **Invoice lines** are entered in a full-screen form. Tap Add line or tap an existing line to open it. The form has the date, description, value (or quantity and unit price), a Save and add another button for quick entry, and Delete line.
- The sales chart's month names are turned upright so all twelve fit.
- When the keyboard is open and you want to move on, tap Done in the top corner to close it.

On the iPhone Duo, the app uses the compact iPhone layout on the outer screen and the full iPad layout when the phone is opened flat.



Home on iPhone.

14 Tips and gestures

Where	Gesture	What happens
Customer list	Swipe left	Delete the customer (with confirmation)
Invoice list (customer page or Ledger)	Swipe right	Copy the invoice as a new one dated today
Invoice list (customer page or Ledger)	Swipe left	Delete the invoice (with confirmation)
Invoice list	Touch and hold	Menu: Copy, Convert to Invoice (quotes), Issue Credit Note (invoices)
Invoice editor, a line	Swipe left	Delete the line
Invoice editor, a payment	Swipe left	Delete the payment
Any text field	Tap Done in the top corner	Close the keyboard
Description field	Press Return	Start a new line within the description

Invoice status at a glance

Badge	Meaning
Draft	The invoice has no lines with a value yet. It is not counted as owed.
Unpaid	It has a value and no payments.
Part paid	Some payment has been recorded but a balance remains.
Paid	Payments cover the full total.
Credited	Credit notes cancel the whole invoice; nothing was paid.
Refund due	Payments exceed what is left after credit notes; money is owed back to the customer.
Open Accepted Declined Expired Invoiced	Quote statuses. Expired is automatic once the valid-until date has passed; Invoiced means an invoice has been raised from it.
Credit	A credit note.

Good habits

- Set your business details, tax and footer **before** printing your first invoice, so every PDF looks right.
- Record payments on the day you receive them; the Home figures and the ledger then stay accurate.
- Export the ledger to Excel at the end of each month or quarter and keep the file with your accounts.
- Take a backup before restoring, before changing devices, and occasionally anyway.

15 Questions and troubleshooting

The amounts show the wrong currency symbol.

Change the currency in Settings › Currency and tax. The number format (where the comma and point go) follows the Region setting of the device in the iOS Settings app.

I entered a value and it was ignored.

Enter the amount with your region's decimal separator (a point in the UK and US, a comma in most of Europe) and without a currency symbol.

An invoice shows as Draft although I entered lines.

A line counts only when it has a value. Check that the value (or quantity and price) is filled in.

Home shows a banner about duplicate invoice numbers.

Two invoices share a number, usually because two devices created invoices with the same prefix. Open one of them and change its number or prefix. Give each device its own prefix in Settings › Invoice numbering to prevent it happening again. The app never renumbers invoices for you.

My data has not appeared on my other device.

Check both devices are signed in to the same Apple account with iCloud Drive on, that Sync with iCloud is on in Invoice Toolbox's Settings on both, and that both have been online since the change. Settings › iCloud shows the current status. Leave the app open for a minute; large first syncs can take a little while.

The setup wizard appeared again.

The wizard shows only when there are no customers and no business name. This happens on a fresh install before iCloud has delivered your data; tap Skip and wait, or restore a backup.

Can I change the invoice number?

Yes, in the Invoice section of the editor. Avoid changing a number you have already sent to a customer. The app warns you if the new number is already in use.

Can I print on paper?

Yes. Tap Print on the invoice, then the printer button in the preview to use any AirPrint printer on your Wi-Fi.

What happens to my invoices if I stop subscribing?

Nothing is deleted and nothing is hidden. Every customer, invoice, quote, credit note and payment stays on your device and in your iCloud, and you can open, print, email, export and back them up as before. Only creating new ones, and recording new payments, needs the subscription again.

Does the app work without internet?

Yes. Everything is stored on the device. iCloud sync and emailing need a connection, but invoicing, printing to a local printer and recording payments do not.

How do I move to a new iPad?

If iCloud sync is on, simply install the app on the new iPad, sign in to the same Apple account and tap Skip on the wizard. Otherwise take a backup on the old device, send it to the new one, and use Restore… in Settings.