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## Invoices

Finance workspace for invoices, products, paid revenue and pending collections.

### Invoices

Create invoices from multiple CRM products, monitor paid revenue and manage pending collections.

Create Invoice

Quick Payments

Dashboard

<b>TOTAL INVOICES</b> <b>2</b> R5 000.00 issued	<b>PAID</b> <b>R0.00</b> 0 paid invoices	<b>PENDING</b> <b>R2 500.00</b> 1 awaiting collection	<b>OVERDUE</b> <b>R2 500.00</b> 1 needs follow-up
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#### Invoice health

Green = paid, orange = pending/draft/sent, red = overdue. Figures are calculated from the SQL invoice register.

#### Status split

- Paid: R0.00
- Pending: R2 500.00
- Overdue: R2 500.00

#### Create invoice with multiple products

CLIENT	INVOICE NUMBER	STATUS	DUE DATE
Select client	INV-2026-00002	Sent	01/06/2026

INVOICE NOTE: Citiview professional service invoice

MANUAL AMOUNT FALLBACK: 0.00

**Save Invoice**

Select products / services

Select one or more CRM products. Quantity and price can be edited before saving.

Search products, category or service name

<input type="checkbox"/> <b>COIDA Letter of Good Standing</b> COIDA ZAR 0.00 COIDA letter of good standing support with company documents and passport copy. 1 0.00	<input type="checkbox"/> <b>Import and Export License</b> Trade ZAR 0.00 Import and export license support with SARS public officer requirements. 1 0.00	<input type="checkbox"/> <b>Business E-mail Address plus Domain</b> Digital ZAR 0.00 Business email and domain setup with three proposed email address options. 1 0.00
<input type="checkbox"/> <b>Beneficial Ownership Registration</b> Compliance ZAR 0.00 Beneficial ownership registration with company documents and passport copy. 1 0.00	<input type="checkbox"/> <b>Business E-mail Address plus Domain</b> Digital ZAR 0.00 Business email and domain support with three proposed email address options. 1 0.00	<input type="checkbox"/> <b>CIPC Annual Returns</b> CIPC ZAR 0.00 CIPC annual returns fulfilment with company registration documents and passport copy. 1 0.00
<input type="checkbox"/> <b>COIDA Letter of Good Standing</b> COIDA ZAR 0.00 COIDA letter of good standing support with company documents and passport copy. 1 0.00	<input type="checkbox"/> <b>COIDA Registration</b> COIDA ZAR 0.00 COIDA registration support with company documents and passport copy. 1 0.00	<input type="checkbox"/> <b>CSD Registration</b> Tender ZAR 0.00 Central Supplier Database registration support. 1 0.00
<input type="checkbox"/> <b>Import and Export License</b> Trade ZAR 0.00 Import and export license support with SARS public officer requirements. 1 0.00	<input type="checkbox"/> <b>SARS Representative Registration (Public Officer)</b> Tax ZAR 0.00 SARS representative registration/public officer support. 1 0.00	<input type="checkbox"/> <b>Tax Number &amp; PIN</b> Tax ZAR 0.00 Tax number and SARS PIN support linked to client profile requirements. 1 0.00
<input type="checkbox"/> <b>Tax Returns for One-year Assessment</b> Tax ZAR 0.00		

One-year tax returns assessment.

1

0.00

Selected invoice total updates automatically. Server recalculates the final amount before saving.

R0.00

Search invoice number, client, company or email

All statuses

Filter

### Invoice register

INVOICE	CLIENT	STATUS	AMOUNT	PAID	ITEMS	DUE	CREATED	ACTIONS
<b>INV-DEMO-2026-001</b> #2	<b>Demo Client User</b> Demo Africa Trading (Pty) Ltd demo.client@citiview.co.za	<b>Sent</b>	<b>R2 500.00</b>	R0.00 1 payment records	<b>1 Lines</b>	2026-05-31	2026-05-24 17:17:09	<b>Paid</b> <b>Sent</b> <b>Pay</b>
<b>INV-2026-00001</b> #1	<b>Ryan Dirk</b> bnddanz@gmail.com	<b>Overdue</b>	<b>R2 500.00</b>	R0.00 0 payment records	<b>0 Lines</b>	2026-03-28	2026-03-21 14:48:05	<b>Paid</b> <b>Sent</b> <b>Pay</b>

Logout