

User Guide

Step-by-step guide to set up your account and use EU Invoice: clients, templates, invoices, settings, reports, and other tools.

Getting started

1. Create an account and confirm your email.
 2. Log in and complete onboarding (company profile, VAT rules, and default settings).
 3. Connect Stripe (if required for your plan/features) to enable invoice payment links.
 4. Create your first client.
 5. Create your first invoice and export/download PDF.
1. Go to Dashboard !' Settings and confirm your company legal name, VAT number, and address.
 2. Set your default currency and invoice numbering/prefix (if available).
 3. Review your VAT configuration (standard VAT vs reverse charge scenarios).
 4. Create at least one item template for your most common service/product to speed up invoicing.

Tip: Keep your company profile (name, VAT number, address) and invoice defaults set before issuing invoices. This avoids rework and helps compliance.

Clients

Clients are the recipients of your invoices. Keep client data accurate for compliance (VAT/addresses) and to avoid issues when exporting invoices.

1. Go to Dashboard !' Clients.
2. Click "New client".
3. Fill in company name, VAT number (if applicable), address, email and country.
4. If VAT validation (VIES) is available, validate and confirm the VAT status.
5. Save. You can edit a client later from the clients list.

VAT tips: For EU B2B invoices, validate the VAT number (VIES) and ensure the client country is correct. This is a key input for deciding whether VAT is charged or reverse charge applies.

Contacts: If you invoice a department, set the client email to the billing contact. This reduces payment delays caused by invoices going to the wrong inbox.

Recommendation: Always store the legal company name and full address (including postal code). This information is often required for EU VAT-compliant invoices.

Deleting a client may be blocked if invoices already exist for that client (to preserve historical accounting integrity).

Models / Templates (Item templates)

Templates let you save frequently used invoice line items (e.g., consulting package, subscription fee) so you can reuse them when creating invoices.

1. Go to Dashboard !' Templates.
2. Click "New template".
3. Fill in name, description, quantity, unit price and currency.
4. Save. Use templates when creating invoices to speed up data entry.

What to include in a template: a clear description (what is being delivered), the standard quantity (e.g., 1 hour, 1 package), and the correct currency. Taxes/VAT are typically applied at invoice level based on rules and client VAT status.

Best practice: Create one template per recurring product/service. Use clear names (e.g., "Monthly Retainer", "Consulting - 1h") so the invoice lines are easy to audit later.

Invoices

Invoices are the core of the system. A typical workflow is: create ! review ! send/share ! track payment ! export or archive.

1. Go to Dashboard ! Invoices.
 2. Click “New invoice”.
 3. Select a client (create one first if needed).
 4. Fill invoice number, dates, currency and line items.
 5. Review totals, VAT rules and notes.
 6. Create the invoice, then download the PDF or share a payment link (if enabled).
1. Pre-send checklist: confirm client legal name/address, VAT number (and VIES status if applicable), invoice dates, totals, and the applied VAT rule.
 2. If you used templates, verify quantities and unit prices are correct for this specific invoice.
 3. Confirm the PDF looks correct (company data, client data, amounts, VAT lines, legal clause if applicable).

Before sending: verify the client VAT number and country, and make sure the system applied the correct VAT rule (standard VAT vs reverse charge). For EU cross-border B2B, reverse charge may apply and a legal clause may be included in the PDF depending on your configuration.

Draft vs sent: If your workspace uses a draft concept, edit invoices while they are in “Draft”. For already issued/sent invoices, prefer duplicating to keep accounting history consistent.

1. After issuing: download and store the PDF (and UBL export if needed).
2. If online payments are enabled, share the payment link and monitor status updates.
3. If a correction is needed after sending, duplicate the invoice and issue a corrected version to preserve the audit trail.

Exports: After creating an invoice, you can download the PDF for your client. If available, you can also export UBL (EN16931) XML to share with e-invoicing platforms that accept UBL.

If your invoice supports online payments, the invoice status can be updated automatically after payment confirmation.

Settings

Settings control your profile, company details and invoice defaults. Keep branding and legal info consistent with your business requirements.

1. Go to Dashboard ! Settings.
2. Update company name, VAT number, address and default currency.
3. Configure invoice defaults such as prefixes and payment terms (if available).
4. If you use Stripe Connect, use the integration settings to connect/manage your Stripe account.

Invoice numbering: Prefer a predictable format (e.g., INV-2026-0001). If your settings support prefixes/series, keep them stable to simplify audits and customer communication.

Branding: If your plan supports it, add your logo and brand colors so PDFs match your company identity.

Reports

Reports help you understand revenue, paid vs outstanding amounts and trends. Use filters by time period and currency as needed.

1. Go to Dashboard ! Reports.
2. Select a date range.
3. Review charts and summary cards.
4. Export if available (CSV/Excel/JSON depending on plan).

1. Interpretation: “Paid” usually represents invoices marked as paid/settled, while “Outstanding” (or open) represents invoices not yet paid.

2. If you use online payments, verify the report aligns with payment confirmations and invoice status changes.
3. For accounting: export data monthly and reconcile invoice numbers (no gaps/duplicates) with your bookkeeping system.

Tip: When comparing periods, keep the currency consistent. If you invoice in multiple currencies, use filters or separate exports per currency to avoid misleading totals.

Checklist: if totals look wrong, check the date range, invoice status filters (draft/sent/paid), and whether credit notes/duplicates exist in the period (if your workspace uses them).

Exports (PDF / UBL / Data)

EU Invoice can generate PDFs for clients and (when available) export structured formats to integrate with accounting or e-invoicing platforms.

1. Open an invoice.
2. Use the export actions to download PDF.
3. If available, export UBL (EN16931) XML for e-invoicing compliance or uploading to another platform.

When to use UBL: Use UBL XML if your customer or government platform requires structured e-invoices. For most clients, the PDF is enough for delivery and record keeping.

Receipts / Proofs (attachments)

Receipts and proofs let you attach supporting documents to invoices (e.g., expense proofs, delivery proofs). Availability depends on your plan.

1. Go to Dashboard !' Receipts (or open an invoice and attach a proof).
2. Upload the file(s) and confirm the association to the invoice.
3. Use thumbnails/list view to quickly locate attachments later.

Retention: Some plans include automatic cleanup/retention policies. If you need long-term storage for compliance, keep your own backups according to your local accounting rules.

Team (seats & invites)

If your plan includes seats, you can invite teammates and control access. Use least-privilege permissions to keep financial data secure.

1. Go to Dashboard !' Team.
2. Invite a new member by email (if available).
3. Assign roles/permissions according to responsibilities.

Security: Avoid sharing accounts. Use individual seats so you can track actions and revoke access quickly if needed.

Subscription & Billing

Your plan limits features (invoice volume, templates, exports, seats). Upgrade when you need more capacity or advanced features.

1. Go to Dashboard !' Subscription (or Billing).
2. Review the plan features and limits.
3. Upgrade/downgrade as needed. Changes usually apply immediately.

If you hit a limit (e.g., monthly invoices), upgrade before issuing urgent invoices to avoid workflow interruptions.

Payments (Stripe Checkout + Connect)

If payments are enabled in your plan, you can connect Stripe Connect and generate invoice payment links. This helps clients pay online and keeps payment status consistent with your reports.

1. Go to Dashboard !' Settings !' Payments (Stripe).
2. Start/complete Stripe Connect onboarding (required to receive payments).
3. Create an invoice and enable payments (if available).
4. Share the payment link with your client and monitor the paid status.

Security note: Stripe onboarding and bank details are managed by Stripe. Never share API keys or sensitive payment information in support tickets or chat.

Peppol / e-invoicing (when applicable)

Some customers or jurisdictions require structured e-invoices. When supported, EU Invoice can help you export UBL (EN16931) and integrate with Peppol-compatible workflows.

Best practice: keep client identifiers, VAT numbers and addresses accurate. Structured e-invoicing is more strict than PDF delivery.

International clients (outside Europe)

EU Invoice is not limited to Europe. You can invoice international clients with multi-language PDFs and different currencies. VAT/VIES rules primarily apply to EU VAT scenarios, so always confirm local tax rules for non-EU cases.

1. Pick the correct client country and currency.
2. Use a clear description in line items (services delivered, period, quantity).
3. If your accountant requires additional fields, include them in notes or templates.

Security & privacy

Do not share sensitive data (VAT numbers, IBANs, API keys, full client emails) in chat. Use the in-app Settings screens to change company details.

1. Use strong passwords and enable MFA if available.
2. Invite teammates with seats instead of sharing accounts.
3. If you suspect unauthorized access, rotate credentials and contact support via tickets.

Best practices

1. Keep your company profile updated (legal name, VAT number, address).
2. Use consistent invoice numbering (prefix + sequence) to simplify audits.
3. Validate VAT (VIES) when issuing cross-border EU invoices.
4. Prefer duplicating sent invoices instead of editing them, to preserve history.
5. Export PDFs and keep backups for compliance and customer communication.
6. If you attach receipts/proofs, also keep an offline backup according to your compliance requirements.
7. Invite teammates using seats instead of sharing accounts, and review permissions regularly.

Support (tickets)

Use the Help Center for quick links, FAQs and to report problems. If you need support, include invoice IDs, timestamps and screenshots where possible.

1. Go to Help.
 2. Read the FAQ for common questions.
 3. Use “Report a problem” to open a ticket (if your role allows it).
1. When opening a ticket, include: invoice ID/number, client name, what you expected vs what happened, and steps to reproduce.

2. Add the approximate time (and timezone), your browser/device, and screenshots of the page or PDF.
3. If the issue is about VAT/VIES/reverse charge, include the client VAT number and country used on the invoice.