

The Freelancer Invoice & Payment Tracker

Quick-Start Guide · Log invoices and payments, see who owes you what, and spot overdue money at a glance. Handles partial payments.

What's in your download

- Invoice-Tracker.xlsx: the blank workbook, ready for your details
- Invoice-Tracker (Example).xlsx: the same workbook filled with made-up data, so you can see how it works
- Quick-Start-Guide.pdf: this guide

Opening the file

The workbook is a standard .xlsx file. It opens in any modern spreadsheet app on a computer, and in free web-based spreadsheet apps (upload the file, then open it). Keep a copy of the original download as a backup.

Set up in five minutes

1. Add your clients on the Clients tab. They appear in the Invoices dropdown.
2. Add one row on Invoices for each invoice you send: number, client, issue date and amount. Leave Terms blank to use the default.
3. When money arrives, add a row on Payments, pick the invoice number and type the amount. Part payments are fine.
4. Status, balance and days overdue calculate on their own. Overdue rows turn red.
5. Tick Void on a cancelled invoice to remove it from the totals.
6. The Dashboard shows aging, and By Client shows each client's open balance.

Tab by tab

Dashboard. Outstanding and overdue totals, aging buckets, year-to-date invoiced and collected, and a monthly chart.

Invoices. Every invoice with due date, amount paid, balance, automatic status and days overdue.

Payments. Every payment received, linked to an invoice number. The client fills in automatically.

Clients. Your client list with contact details.

By Client. Totals per client across all invoices (voided invoices left out).

Monthly Summary. Invoiced and collected for each month of the tracking year.

Tips

- Voiding an invoice instead of deleting it keeps the invoice numbers in sequence.
- Use the Notes column to record any reminder you send and the date.
- Enter the same payment terms here that appear on the invoice.
- The Notes column can hold a short record of who was contacted and when.

This workbook is a tracking tool. It does not create invoices, calculate tax or give accounting advice.

Need help?

If something doesn't work the way you expect, contact the support address on the shop page. If the kit isn't right for you, ask for a refund within 14 days of purchase.

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