Free Invoice Tracker Spreadsheet: how to use it

Start here:

Yellow cells are yours to fill in. Green-grey cells hold formulas: leave them alone and they fill themselves.

The example file is filled with fictional invoices so you can see every number working. The blank file is the same workbook, empty: use that one.

Google Sheets: File > Import > Upload the .xlsx (or open it from Google Drive), then File > Save as Google Sheets. Excel: just open it (Excel 2010 or newer). Numbers on Mac also opens it.

Set up (2 minutes):

1. Settings: type your clients (up to 15) and the year you are tracking (E2). The check date (E4) decides which unpaid invoices are overdue: the blank file uses TODAY() so it updates itself; type a fixed date there to see the sheet as of that day.

2. Invoices: one row per invoice: number, client, what it was for, invoice date, due date and amount. When money arrives, type the date and the amount received (partial payments work: type the running total).

Status fills in: PAID, PARTIAL, OVERDUE (due date before the check date and a balance left) or OPEN. Balance and days overdue fill in too.

What you get:

Dashboard: invoiced, collected and outstanding by month; each client with invoiced, collected and what they still owe; an ageing table (not yet due, 1-30, 31-60, over 60 days overdue); counts by status.

Limits: 500 invoice rows, 15 clients. This is a record-keeping tool, not accounting or tax advice.

Need expenses, Schedule C categories and quarterly tax too? See the paid templates at tuper.app/templates.

Help:

Something wrong? Message us at support@tuper.app and we fix it.

Designed by Tuper. Built with AI tools and tested by us; tell us if anything breaks.