Contents

Glossary - Agynamix Invoicer

Version 1.7.0 Date: June 2026

1. Menu Bar

1.1 File Menu

Create Backup...

- Create manual database backup
- Choose storage location

Restore from Backup...

- Restore database from backup
- All current data will be overwritten

Verify Audit Log...

- Transaction-log verification for GoBD-oriented workflows

Export Audit Log...

- Export audit log for external archiving

Import & Verify Export...

- Import and verify previously exported audit log

Export Data (Z3)...

- Z3/GDPdU export for tax audits (stored in archive)

Export DATEV (Buchungsstapel)...

- Export DATEV EXTF booking batch (ZIP with `EXTF_Buchungsstapel.csv` in archive)

Archive Browser

- Opens audit log view filtered to archive exports

Exit

- Close application

1.2 Edit Menu

Preferences

- Opens settings area

Load Demo Data

- Downloads a demo database and creates a sandbox

Switch to Sandbox

- Switches to the sandbox database (only if it exists and you are in production)

Switch to Production

- Switches back to production database (only if you are in sandbox)

Delete Demo Data

- Deletes the sandbox/demo database (only visible when a sandbox exists)

Instance Mode...

- Switch between Standalone, Host, and Client operating modes
- Opens the mode selection and configuration wizard

1.3 Help Menu

Quick Reference

- Opens the quick reference in browser

Manual

- Opens the user manual in browser

Download Compliance Agreement

- Downloads the compliance/procedural documentation PDF

Check for Updates

- Checks for new program versions

License...

- Opens the license dialog (may be hidden in prerelease builds)

License Prefs Debug...

- Debug dialog for license prefs (visible only in dev mode)

Open Database Folder

- Opens folder containing database file

Show Log

- Displays application log

Start Guided Tour

- Starts guided tour through application

About

- Shows version information and license

1.4 Tenant Selection

Dropdown in Menu Bar

- Quick switching between tenants
- Default tenant marked with star icon
- Automatically filters all lists by selected tenant

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2. Sidebar Navigation

Expand/Collapse Sidebar

- Via menu icon ([=]) or arrow icon (<)
- Shows icons and labels (expanded) or icons only (collapsed)

2.1 Dashboard

Icon: Dashboard symbol

- Overview of all key metrics
- Quick access to common actions

2.2 Documents

Icon: List symbol

- Quotes, invoices, correction invoices, payment reminders
- Document presets for recurring quotes and invoices
- Payment Overview for cross-document receivables tracking
- Sales artefacts for supporting transaction files
- Filter functions
- Create and edit

2.3 Incoming Documents

Icon: Inbox symbol

- Supplier invoices and receipts
- Upload PDFs and e-invoices or import them from an email mailbox
- Review extracted data, supplier, amounts, VAT, and category
- Track approval state and payment status
- Keep the source email as provenance when useful
- Archive approved source documents

2.4 Suppliers

Icon: Business/person symbol

- Supplier master data for incoming invoices
- Address, tax, and bank details
- Link supplier to a customer when the same partner has both roles
- Used for matching, payment suggestions, and category suggestions

2.5 Expense Categories

Icon: Category symbol

- Purchase-side categories for incoming documents
- SKR03/SKR04 account mapping
- DATEV BU key, tax rule, and deductibility defaults
- Category suggestions from supplier history, e-invoice data, or AI

2.6 Timesheets

Icon: Clock symbol

- Time tracking
- Link to customers
- Optional invoice preset for recurring invoice structure
- Create invoices from periods using the current preset content

2.7 Tenants

Icon: Business symbol

- Manage own company data
- Invoice and quote number sequences
- Logo, bank details, payment profiles, and document templates
- Accounting system (SKR03/SKR04) for incoming document categories

2.8 Customers

Icon: Person symbol

- Customer management
- Addresses and contact details
- Link to documents

2.9 Products

Icon: Products symbol

- Reusable product and service items
- CSV import/export
- Auto-fill line items in documents

2.10 Text Blocks

Icon: Document symbol

- Reusable text blocks for invoices, quotes, etc.
- Auto-assignment rules for automatic insertion

2.11 Settings

Icon: Gear symbol

- Application configuration
- Backup settings (including encryption)
- Archive storage: local archive, WORM, or S3 Object Lock
- AI integration for incoming document analysis
- DATEV / tax advisor settings for sales and incoming documents
- Email settings (SMTP/IMAP)
- Document email templates
- User management

2.12 Admin

Icon: Admin symbol

- Tax rules and multi-country presets
- Number ranges per document type

2.13 Show Log

Icon: Document symbol

- Application log
- Error messages and system information

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3. Dashboard

3.1 Overview

Statistic Cards

- Open Invoices: Count and total amount
- Due Payments: Overdue invoices
- This Year: Revenue for current year

- This Month: Revenue for current month
- Open Quotes: Pending quotes
- Due Quotes: Expired quotes

3.2 Quick Actions

Welcome Area (when database is empty)

- Create tenant
- Create customer
- Create document
- Restore backup
- Load Demo Data

Click on Statistic Cards

- Opens document list with corresponding filter

3.3 Statistics

Filterable Overview

- By time period
- By document type
- By status

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4. Documents

4.1 Document List

Toolbar Actions

- Filter Button: Extended filter options
- View toggle: List view / Grouped transactions
- Create Button: New document (Quote/Invoice)

Filters

- Text Search: Multi-field search across document number, customer name, line item descriptions, and notes
- Time Period: Year range (start/end year)
- Document Types: Quote, Invoice, Correction Invoice, Payment Reminder
- Status: Draft, Published, Partially Paid, Fully Paid, Cancelled, etc.
- Due Payments: Only overdue invoices
- Due Quotes: Only expired quotes

Reset Filters

- "Clear All Filters" in filter dropdown
- Individual filter groups via X icons

Document Card (List View)

- Document number and status badge
- Customer
- Date and due date
- Amount
- Edit button (pencil icon)
- Preview button (eye icon)
- Menu button ([**:**]) with additional actions

Grouped Transactions

- Transaction row: document types, document count, match count, transaction value, open amount/payment status, last changed
- Expand: load the individual documents in the transaction
- Search, filters, and sorting also work in grouped view

Menu Actions per Document

- Edit: Open document
- Duplicate: Create copy (only for published documents; not available for correction invoices)
- Export: PDF export
- Preview: HTML/PDF preview
- Send via Email: Opens email dialog for document
- Show Log: Transaction history
- Delete: Only for drafts

Document Status Colors

- Gray: Draft
- Light gray: Draft number
- Yellow: Published
- Light green: Accepted
- Green: Paid
- Red: Cancelled

4.2 Create/Edit Document

Header Area

- Back button
- Document type and number
- Unsaved changes indicator

Document Type

- Quote
- Invoice

Select Customer

- Dropdown with all customers
- ”New Customer” - opens customer form

Document Data

- Document date
- Due date / Validity (for quotes)
- Currency (inherited from customer)
- Customer rebate: use customer default, no rebate, or custom rebate

Line Items

- Add Item: New regular line (description, quantity, unit price, VAT rate)
- Add From Product: Fill from a saved product/service
- Text-Only Item: Presentational text, headings, or images — not billed, not included in total
- Delete button (X) per item
- Automatic sum calculation

Text Blocks

- Introduction: Before items
- Conclusion: After items
- Dropdown to select predefined text blocks

- Markdown support

Document Presets

- Start a new quote or invoice from a reusable preset
- Save a recurring draft as a document preset
- Presets can carry items, text blocks, layout, payment profile, and references

Attachments

- Upload files
- Saved with document

Footer Area

- Close: Back to list
- Log: Transaction history
- Save: Save draft
- Next Step: Context-dependent action

Next Step - Options

- Publish: Finalize document and assign number
- Create Invoice: From quote (after acceptance)
- New Revision: Create a draft revision from a published quote
- Quote Accepted: Change status
- Quote Turned Down: Change status
- Mark as Paid: Record payment
- Create Reminder: Send payment reminder
- Cancel: Cancel document (with/without correction invoice)
- Mark as Deletable: Prerequisite for deletion
- Delete: Remove permanently

4.3 Document Actions

Publish

- Assigns permanent document number
- Increments tenant's number sequence
- Makes document immutable
- Creates audit log entry

PDF Export

- Automatic storage in configured document folder
- Path pattern support (see Settings)
- Opens exported file
- Exported e-invoice data can be reviewed and validated in-app

Send via Email

- Opens email dialog for the selected document
- Recipient fields: To, CC, and BCC with multiple addresses
- Validates and normalizes addresses before sending
- Uses configured email settings and document email templates
- Supports preview and optional copy-to-sent (IMAP)

Quote Revisions

- Create a new revision from a published quote
- Only one open draft revision per revision family
- Published revision replaces the previous quote version in the quote process; earlier revisions remain traceable

Preview

- HTML preview in draft
- PDF preview after publication
- Check before export

Duplicate

- Creates copy with new draft number
- Only for published documents
- Copies all items and text blocks
- Not available for correction invoices

Log

- Shows all changes to document
- Tracking for GoBD-oriented workflows
- Exported versions visible

Undo Payment

- Reverse an incorrectly recorded payment
- Document status reverts to Published or Partially Paid
- Original audit log entry is kept; a reversal entry is added

Sales Artefacts

- Store signed quotes, correspondence, evidence, or email attachments with the transaction
- Separate from the related-documents chain

4.4 Related Documents Panel

Where It Appears

- Sidebar panel visible when viewing a document

What It Shows

- Source document (e.g., quote that led to this invoice)
- Derived documents (corrections, payment reminders)
- Full chain: quote → invoice → correction → reminder

Navigation

- Click any linked document to open it directly

4.5 Payment Overview

How to Open

- Sidebar → Documents → Payment Overview, or click a dashboard statistic card

What It Shows

- All payment transactions across all documents
- Columns: document, customer, amount, due date, status

Available Filters

- Overdue: Payments past due
- Due Soon: Payments due within the next few days
- Paid: Completed payments
- All: Full list

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5. Incoming Documents

Purpose

- Received supplier invoices, receipts, and purchase-side documents
- Review, categorize, approve, pay, and archive in a traceable workflow

List Filters

- All
- To Review
- Unpaid
- Overdue
- Paid

Intake Workflow

- Import or drop PDF files
- Optional: collect invoices directly from an email mailbox
- Select the primary source document when multiple files are attached
- Keep the source email as provenance when useful
- Check duplicate warnings
- Use e-invoice extraction when structured data is embedded
- Optional: analyze with AI
- Review fields before saving

Review Fields

- Supplier
- Invoice number
- Invoice date, received date, due date
- Net, VAT, gross amount, VAT rate
- Currency
- Expense category
- Payment reference and bank details

States

- Received: In review
- Approved: Checked and archived
- Disputed: Needs clarification
- Cancelled: Invalidated final state
- Rejected: Not used for booking
- Deletable: Eligible for cleanup

Payment Status

- Unpaid
- Partially Paid
- Paid

Important Actions

- Approve
- Reject
- Dispute
- Cancel Document
- Add Payment
- Add Attachment
- Mark as Paid

AI Notes

- Configure in Settings → AI

- Local providers such as Ollama or LM Studio are preferred when possible
- OpenAI-compatible internet endpoints are supported with API keys
- Known working examples may vary by model availability
- Always review AI results before approval

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6. Suppliers and Expense Categories

Suppliers

- Used for incoming document matching and payment suggestions
- Store address, VAT ID, tax number, email, phone, IBAN, BIC, and bank name
- Can be created manually or from e-invoice/AI data during intake
- Can be linked to a customer when the same partner has both roles

Expense Categories

- Classify incoming documents for reporting and DATEV export
- Use SKR03 or SKR04 account mappings
- Can store DATEV BU key, default tax rule, deductibility, and sort order
- Suggestions can come from supplier defaults, supplier history, e-invoice data, or AI

DATEV Behavior

- Category account mapping is used for incoming documents
- If no mapped account exists, the DATEV default expense account can be used
- Settings can require mapped expense accounts to prevent fallback exports

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7. Tenants

5.1 Tenant List

Toolbar

- Create Button: New tenant

Tenant Card

- Name and default icon (star)
- Address
- Phone
- Invoice format (example with next number)
- Set as Default button (star icon)
- Edit button (pencil icon)
- Delete button (trash icon)

Actions

- Set as Default: Pre-selected at startup
- Edit: Open tenant
- Delete: Only possible when no linked documents exist

5.2 Create/Edit Tenant

Header Area

- Back button
- Title: ”New Tenant” / ”Edit Tenant”

Company Information

- Company name (required)
- Owner (optional)
- Logo (upload image, max. 1 MB)

Address

- Street (required)
- Address line 2 (optional)
- Postal code (required)
- City (required)
- State (optional)
- Country (required)

Tax Data

- Tax ID (required)
- VAT ID (required)

Contact Details

- Phone (required)
- Alternate phone (optional)
- Fax (optional)
- Email (required)
- Billing email (optional)
- Website (optional)

Company Register / Responsible Persons (optional)

- Commercial register
- Managing directors
- Supervisory board chairman

Bank Details

- Bank (required)
- IBAN (required, validated)
- BIC (required, validated)
- Account holder (optional)
- SEPA Creditor ID (optional)

Invoice Settings

- Invoice Number Pattern (required)
  - Parameters: `{doc_no}`, `{year}`, `{month}`, `{day}`
  - Examples:
    - `INV-{doc_no}` → INV-1
    - `INV-{year}-{doc_no}` → INV-2025-1
    - `{year}{month}{day}-{doc_no}` → 20251025-1
- Current Invoice Number (required)
  - Next invoice will use this number + 1
  - Editable only for a new number pattern that has not been used yet (no documents created for it)

Quote Settings

- Quote Number Pattern (required)
  - Parameters: `{doc_no}`, `{year}`, `{month}`, `{day}`
  - Examples:
    - `Q-{doc_no}` → Q-1
    - `Q-{year}-{doc_no}` → Q-2025-1
- Current Quote Number (required)
  - Editable only for a new number pattern that has not been used yet (no documents created for it)

Reminder Settings

- Reminder Number Pattern (required)
  - Parameters: `{doc_no}`, `{year}`, `{month}`, `{day}`
  - Examples:
    - `M-{doc_no}` → M-1
    - `M-{year}-{doc_no}` → M-2025-1
- Current Reminder Number (required)
  - Editable only for a new number pattern that has not been used yet (no documents created for it)

Default Tenant

- Checkbox: Set as default tenant
- Pre-selected at startup

Actions

- Cancel: Back to list (with change confirmation)
- Save: Create/update tenant

5.3 Payment Profiles

What Is a Payment Profile?

- Bank transfer details, PayPal, or other payment method shown on PDF invoices

Manage Multiple Profiles

- Multiple profiles per tenant (e.g., EUR bank account + PayPal)
- Fields: profile name, IBAN, BIC, bank name, account holder, PayPal link

Select on Document

- Choose which payment profile to display on each document

QR Codes on Invoices

- Bank transfer profiles can generate a QR code for banking apps
- QR code appears on the PDF invoice automatically

5.4 Document Templates

What Is a Document Template?

- Controls the visual layout of PDF invoices (logo, banner, fonts, colors)

Opening the Template Editor

- In the tenant form, under "Document Templates"

Layout Options

- Logo and banner positioning
- Font and color choices

Select or Duplicate a Preset

- Choose from built-in templates
- Duplicate any preset to create a custom variant

Live Preview

- Test the layout with a sample document before saving

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8. Customers

6.1 Customer List

Toolbar

- Filter Button: Extended filter options
- Create Button: New customer

Filters

- Text Search: By customer name
- Due Payments: Only customers with overdue invoices
- Has Open Credit: Only customers with remaining correction credit

Customer Card

- Name
- Address
- Email (if available)
- Phone (if available)
- VAT ID (if available)
- Open credit badge (if available)
- Edit button (pencil icon)
- Delete button (trash icon)

Actions

- Edit: Open customer
- Delete: Only possible when no linked documents exist

Customer View

- Financial Profile: Open credit, receivables, payment behavior, cash received, refunds, offsets, Skonto
- Open credit rows: Click correction or original invoice links to open the document; Back returns to the customer view
- Customer rebate: shows the stored default customer rebate

6.2 Create/Edit Customer

Header Area

- Back button
- Title: ”New Customer” / ”Edit Customer”

Customer Data

- Company name (required)
- Owner (optional)
- Salutation (optional)
- Title (optional)
- Internal notes (optional)

Address

- Street (required)
- Address line 2 (optional)
- Postal code (required)
- City (required)
- State (optional)
- Country (required)

Contact Details

- Billing email (optional)

- General email (optional)
- Phone (optional)
- Alternate phone (optional)
- Fax (optional)

Billing Data

- VAT ID (optional)
- Tax ID / Tax number (optional)
- VAT rate (required)
- Currency (required)
- Default customer rebate (optional)
- Language (required): German / English
- E-Invoice Type (required): ZUGFeRD / XRechnung / None

Actions

- Cancel: Back to list (with change confirmation)
- Save: Create/update customer

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9. Products

7.1 Product List

Toolbar

- Create Button: New product
- Import Button: Import products from CSV
- Export Button: Export all products to CSV

Product Card

- Name and description
- Unit price and VAT rate
- Edit button (pencil icon)
- Delete button (trash icon)

Actions

- Edit: Open product
- Delete: Remove product

7.2 Create/Edit Product

Header Area

- Back button
- Title: ”New Product” / ”Edit Product”

Required Fields

- Product name
- Unit price
- VAT rate

Optional Fields

- Description
- Unit (e.g., hours, pieces)
- Product number / SKU

Actions

- Cancel: Back to list (with change confirmation)
- Save: Create/update product

7.3 Using Products in Documents

Add Line Item From Product

- In document editing, click ”Add From Product”
- Search, select, and apply — line item is pre-filled with name, price, and VAT rate

CSV Import/Export

- Export all products for backup or migration
- Import from CSV for bulk setup

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10. Timesheets

10.1 Timesheet List

Toolbar

- Filter Button: Filter by customer
- Create Button: New timesheet

Filters

- Select Customer: Dropdown with all customers
- Clear filter

Timesheet Card

- Title
- Customer
- Reporting period
- Default hourly rate
- Status (Active/Inactive)
- Current period with hours and amount
- View button (card clickable)
- Edit button (pencil icon)

Actions

- View: Opens detail view
- Edit: Opens form

10.2 Create/Edit Timesheet

Header Area

- Back button
- Title: ”New Timesheet” / ”Edit Timesheet”

Timesheet Data

- Title (required)
- Customer (required, dropdown)
- From Date (required)
- To Date (optional)
- Reporting period: weekly, bi-weekly, monthly, or custom
- Default hourly rate
- Invoice Preset (optional)

- Notes (optional, markdown)

Time Entry

- Work date
- Start time / end time (optional)
- Duration: calculated automatically or set manually
- Description
- Task category (optional)
- Work location (optional)
- Billable / non-billable
- Hourly rate override (optional)
- Complete / incomplete

Manage Entries

- Add Entry button
- Edit entry (pencil)
- Delete entry (trash)
- Recalculate duration from start/end time
- Review incomplete entries

Actions

- Cancel: Back (with change confirmation)
- Save: Save timesheet

10.3 Timesheet Details

Header Area

- Back button
- Title
- Edit button

Display

- Customer
- Current period
- Past periods
- Notes
- Entries table (date, description, duration, location, amount, status)
- Totals: total hours, billable hours, total amount

Actions

- Edit: Opens form
- Create invoice: Finalizes the current period and creates a draft invoice with current preset content
- Finalize period: Closes the period without an invoice
- PDF preview: Shows the finalized time record
- Archive PDF: Stores the PDF in the archive and marks the period as archived
- Download: Downloads the archived period PDF
- Delete period: Only for linked draft invoices and non-archived periods
- Back: To list

Notes

- Incomplete entries remain visible but do not count toward customer-facing finalizations
- In Client mode, finalization/archiving requires a Host connection

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11. Text Blocks

9.1 Text Block List

Toolbar

- Create Button: New text block

Text Block Card

- Title
- Category
- Text preview (first lines)
- Edit button (pencil icon)
- Delete button (trash icon)

Actions

- Edit: Open text block
- Delete: Remove text block

9.2 Create/Edit Text Block

Header Area

- Back button
- Title: ”New Text Block” / ”Edit Text Block”

Text Block Data

- Title (required)
- Category (dropdown): Introduction, Conclusion
- Text (required, Markdown editor)

Markdown Support

- Bold: `**Text**`
- Italic: `*Text*`
- Headings: `# H1`, `## H2`, `### H3`
- Lists: `- Bullet`, `1. Numbered`
- Links: `[Text](URL)`

Actions

- Cancel: Back to list (with change confirmation)
- Save: Create/update text block

9.3 Auto-Assignment Rules

What Is Auto-Assignment?

- Text blocks automatically inserted into matching documents based on configurable rules
- Saves time for recurring content (e.g., payment terms always added to invoices)

Matching Criteria

- By customer, by document type, by tenant

Configure on Text Block

- Open any text block and expand the Auto-Assignment section
- Set the criteria and save

Override on Document

- Remove an auto-assigned text block from a specific document at any time

12. Settings

10.1 Appearance

Theme

- System Default: Follows operating system setting
- Dark Mode: Always dark mode
- Light Mode: Always light mode

Clear Cache

- Deletes temporary data and preview images

10.2 Backup

Frequency

- None: No automatic backups
- Always: On every exit
- Daily: Once per day
- Weekly: Once per week
- Monthly: Once per month

Backup Directory

- Choose Directory button
- Display path
- Clear path (X)

Retention Period

- Keep: Indefinitely
- 1 Day: Delete after one day
- 1 Week: Delete after one week
- 1 Month: Delete after one month
- 1 Year: Delete after one year

Note

- Backups are created automatically when closing
- Storage location must be configured before first backup

Encrypted Backups

- Optional passphrase encryption for backup files
- Enable in the backup dialog: check ”Encrypt backup” and set a passphrase
- Restore: the passphrase is required when restoring an encrypted backup
- Recommended when storing backups in cloud or shared locations
- Warning: a lost passphrase cannot be recovered — the backup becomes unrestorable

10.3 Documents

Document Root

- Main folder for all generated documents
- Choose Directory button
- Clear path (X)

Document Name Pattern (optional)

- Leave empty: All documents in main folder

- With pattern: Automatic subfolder structure

Available Parameters

- `{tenant}`: Tenant name
- `{customer}`: Customer name
- `{year}`: Year (YYYY)
- `{month}`: Month (MM)
- `{day}`: Day (DD)
- `{date}`: Date (YYYYMMDD)
- `{document_type}`: Document type (e.g., Invoice, Quote)
- `{document_number}`: Document number

Examples

- `{year}/{customer}/{document_type}_{document_number}`
  - Result: `2025/Example Company Ltd/Invoice_INV-2025-42.pdf`
- `{year}/{month}/{document_type}`
  - Result: `2025/11/Invoice/INV-2025-42.pdf`
- `{tenant}/{year}`
  - Result: `MyCompany/2025/INV-2025-42.pdf`

Notes

- Path separators (`/` or `\`) are automatically converted
- Invalid characters (`<>:"|?*`) are removed or replaced
- Spaces are replaced with `_`

S3-Compatible Archive Storage

- Optional alternative to local filesystem for the GoBD archive
- Configuration: endpoint URL, bucket name, access credentials
- Useful for NAS with S3 support or cloud compliance storage
- Recommended: validate the setup with a non-production document before using it in production

10.4 Updates

Automatically Check for Updates

- Checkbox: Check for new versions at program startup

10.5 Email

SMTP (Send Mail)

- Server, port, and encryption (TLS/STARTTLS)
- Username/password authentication

IMAP (Copy to Sent, optional)

- Optional copy of outgoing mails to a sent folder
- Sent folder name depends on your email provider (e.g. "Sent", "Sent Items")

10.6 Document Emails

Templates

- Subject and body templates for document emails
- Markdown supported
- Token insertion with preview

10.7 User Management

Users & Roles

- Create users, assign roles/permissions
- Set/change passwords
- Clear passwords only in Standalone mode
- In client-server setups, administrators can change another user's password from any connected machine
- Recovery-key password reset is restricted and uses the server recovery key, not the client machine's local recovery key
- Delete users (if permitted)

10.8 Admin Area

What Is the Admin Area?

- Management of tax rules and document number ranges
- Accessed via Admin in the sidebar

Tax Rules

- Built-in presets: Germany (19%/7%), Austria (20%/10%), Switzerland (7.7%)
- Create custom rules: Reverse Charge, exempt supplies, etc.
- Automatic tax selection based on customer country

Number Ranges

- Dedicated ranges per document type (invoices, quotes, reminders)
- Fields: prefix, year pattern, counter, year-end rollover setting
- Live preview before saving
- Warning: changing an existing range has GoBD implications

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13. Operating Modes

11.1 Overview

Three Modes

- Standalone: Traditional single-computer mode (default for all existing users)
- Host: One installation acts as the central server for a team
- Client: Connects to a host and shares its data

Which Mode Should I Use?

- Just me on one computer → Standalone
- Small team sharing one database → Host (server computer) + Client (each team member)

Switching Modes

- Via Edit → Instance Mode... in the menu bar

11.2 Setting Up as Host

Prerequisites

- Always-on computer or server with network access
- Firewall/port configured for client connections
- Store the server recovery key offline; only administrators should know it

Before Going Headless — Configure via Regular UI First:

1. Automatic backup (frequency and directory)

2. GoBD archive location
3. At least one user account with password
4. Listen URL and port
5. API token

11.3 Headless Mode (Host Without a Screen)

No desktop window — the server runs silently in the background.

Start Commands

Linux (AppImage):

```
./agynamix-invoicer.AppImage --headless
```

Linux (installed):

```
/opt/agynamix-invoicer/bin/AGYNAMIX\ Invoicer \
  --headless
```

macOS:

```
/Applications/AGYNAMIX\ Invoicer.app/Contents/MacOS/AGYNAMIX\ Invoicer \
  --headless
```

Windows (CMD):

```
"%LOCALAPPDATA%\AGYNAMIX Invoicer\AGYNAMIX Invoicer.exe" ^
  --headless
```

Windows (PS):

```
& "$env:LOCALAPPDATA\AGYNAMIX Invoicer\AGYNAMIX Invoicer.exe" `
  --headless
```

- Stop: close the terminal or send Ctrl+C (Linux/macOS), use Task Manager (Windows)
- Missing prerequisites → application logs an error and exits

11.4 Connecting as Client

What You Need

- Host address, port, username, and password (from the host administrator)

How to Connect

- Edit → Instance Mode → Client → enter host address and credentials

After Connecting

- Local data is replaced by a synchronized replica from the host
- Published documents go to the host; drafts are local

If Host is Unavailable

- Read-only access to the local replica until connection is restored

Switching Back to Standalone

- Edit → Instance Mode → Standalone

11.5 Client Mode: What to Expect

Data Storage

- Authoritative data lives on the host; your device holds a local replica

Settings

- Theme and backup path are local; other settings come from the host

Permissions

- Set by the host administrator per user account

Passwords & Recovery Keys

- Each client machine has its own local recovery key for local secrets
- Resetting a shared user password is an administrator-only action and uses the server recovery key
- Completely clearing a password is supported only in Standalone mode

Sandbox Mode

- Demo/sandbox database is also available in client mode

11.6 App Data Directory

Configuration Priority

1. Startup parameter `--app-data-dir`
2. JVM property `APP_DATA_DIR`
3. Environment variable `AGYNAMIX_INVOICER_DATA_DIR`
4. `invoicer-runtime.properties`

Typical Use

- Administrators can place database, logs, backups, and local runtime data in a custom directory
- Useful for installed apps, terminal starts, and headless hosts

Important

- A shared SQLite directory is not multi-user operation
- Use Host/Client mode for multiple users

11.7 Glossary of Client-Server Terms

Host / Server The central Invoicer installation storing authoritative data.

Client An Invoicer installation connected to a host.

Standalone Traditional single-user mode.

Headless Host started with `--headless`; no window, server-only.

Replica Local copy of host data on a client machine.

Synchronization Automatic process keeping the client's local copy up to date.

Appendix

Keyboard Shortcuts

No special keyboard shortcuts defined. Navigation via mouse/trackpad.

Database Location

Development/Standard

Linux:

`$XDG_DATA_HOME/agynamix-invoicer/invoicer_db.db`

Typical on Linux:

`~/.local/share/agynamix-invoicer/invoicer_db.db`

macOS:

`~/Library/Application Support/agynamix-invoicer/invoicer_db.db`

Windows:

`%LOCALAPPDATA%\agynamix-invoicer\invoicer_db.db`

Support and Documentation

Website: https://www.agynamix.de **Online Documentation**: Via Help Menu → Manual / Quick Reference

Version Information

This documentation refers to Agynamix Invoicer version 1.7.0 and higher.