

Finance

Manage customers, invoicing, payments, expenses and receivables follow-up.



**Maintain customer
master data**



Create and follow invoices



**Track payments and open
balances**



**Follow overdue
receivables**



**Register and review
expenses**

Finance overview

Monitor billing activity, receivables, overdue value and collections.

Open in Demo ↗

FINANCE

Home

Customers

Invoices

Payments

Expenses

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ADMIN · Demo

Exit demo

WORKSPACE Finance

Search orders or customers...

Go

Academy

Alex Morgan Finance

Finance overview

FINANCE CONTROL · OVERVIEW

Stay in control of billing and cash follow-up

Invoices, receivables, payments and billing follow-up in one financial workspace.

Open billing Payments Customers

INVOICES 10

OPEN RECEIVABLES €13,339.60

OVERDUE €2,032.80

PAID THIS MONTH €9,275.10

FINANCE OVERVIEW Billing activity

Invoice volume	10
Open receivables	€13,339.60
Overdue receivables	€2,032.80
Paid this month	€9,275.10

FINANCE FOLLOW-UP Finance follow-up

Billing customers	6
Paid total	€9,275.10
Overdue balance	€2,032.80

DEMO DATA Safe Academy workspace Reset

LIVE FINANCE

Design plans

Step 1

Start with open receivables and overdue indicators.

Step 2

Open billing or payments from the overview.

Step 3

Use follow-up panels to prioritize finance work.

Customers

Maintain customer and billing master data.

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Customers

Search customers...

All accounts

Customer A-Z

+ New customer

CUSTOMERS 6

Billing accounts

ACTIVE 6

Active customers

WITH EMAIL 6

Invoice delivery ready

WITH INVOICES 6

Billing history

REGISTER Customers

6 of 6

Use the top filters or click a KPI card to pivot this register instantly.

CUSTOMER	VAT	BILLING EMAIL	ORDERS	INVOICES	STATUS
Alpha Facilities NV ALPHA	BE0765123456	finance@alpha-demo.be	8	3	Active
Nova Retail Belgium NOVA	BE0766123457	ap@nova-demo.be	7	2	Active
GreenGrid Services GREEN	BE0767123458	billing@greengrid-demo.be	6	2	Active
Metro Property Group METRO	BE0768123459	accounts@metro-demo.be	5	2	Active
Orbit Logistics ORBIT	BE0769123460	finance@orbit-demo.be	5	1	Active
UrbanCare SRL URBAN	BE0770123461	billing@urbancare-demo.be	4	1	Active

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Support

Step 1

Create a customer before issuing invoices.

Step 2

Keep contact and billing information accurate.

Step 3

Use customer records as the shared source for finance workflows.

Invoices

Create, filter and follow invoices by lifecycle, customer and balance.

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Finance

Search orders or customers...

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Finance

Invoices

Search invoices...

All statuses

All customers

All sources

Newest first

+ New invoice

INVOICES

10

Show all invoices

PAYMENTS RECEIVED

€9,275.30

Invoices with payments

OPEN BALANCE

€13,339.60

Outstanding invoices

OVERDUE BALANCE

€2,032.80

Past-due invoices

REGISTER

Invoices

10 of 10

Use the top filters or click a KPI card to pivot this register instantly.

INVOICE	CUSTOMER	DUE	TOTAL	BALANCE	STATUS	ACTION
INV-2026-0041	Alpha Facilities NV	02/10/2026	€2,964.50	€1,764.50	Sent	Open >
INV-2026-0042	Nova Retail Belgium	19/09/2026	€2,032.80	€2,032.80	Overdue	Open >
INV-2026-0043	GreenGrid Services	08/10/2026	€3,859.90	€0.00	Paid	Open >
INV-2026-0044	Metro Property Group	10/10/2026	€1,185.80	€1,185.80	Draft	Open >
INV-2026-0045	Orbit Logistics	12/10/2026	€2,565.20	€2,565.20	Sent	Open >
INV-2026-0046	UrbanCare SRL	14/10/2026	€1,742.40	€842.40	Partially paid	Open >
INV-2026-0047	Alpha Facilities NV	15/10/2026	€919.60	€0.00	Paid	Open >
INV-2026-0048	Nova Retail Belgium	17/10/2026	€1,512.50	€1,512.50	Draft	Open >

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Reset

Support

Step 1

Click KPI cards to pivot the register.

Step 2

Use header filters instead of duplicate filter rows.

Step 3

Open overdue or open-balance invoices for follow-up.

Payments

Register and review incoming customer payments.

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Payments

Search payments...

All methods

Newest first

Add payment

PAYMENTS5Recorded payments

RECEIVED€9,275.30Cash collected

BANK5Bank payments

NEEDS REVIEW0Reconciliation

REGISTERPayments5 of 5

Use the top filters or click a KPI card to pivot this register instantly.

INVOICE	CUSTOMER	AMOUNT	DATE	METHOD	STATUS
INV-2026-0041	Alpha Facilities NV	€1,200.00	16/09/2026	Bank	Recorded
INV-2026-0043	GreenGrid Services	€3,859.90	13/09/2026	Bank	Recorded
INV-2026-0046	UrbanCare SRL	€900.00	18/09/2026	Bank	Recorded
INV-2026-0047	Alpha Facilities NV	€919.60	16/09/2026	Bank	Recorded
INV-2026-0050	Metro Property Group	€2,395.80	19/09/2026	Bank	Recorded

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Support

Step 1

Record invoice reference, amount, date and method.

Step 2

Use filters to find a payment quickly.

Step 3

Verify invoice balances after payment registration.

Expenses

Record and review company expenses.

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Expenses

Search expenses...

All categories

All statuses

+ Add expense

EXPENSES 4

Operating costs

APPROVED €1,568.35

Validated costs

PENDING 1

Needs review

THIS MONTH €1,780.10

September 2026

REGISTER Expenses

4 of 4

Use the top filters or click a KPI card to pivot this register instantly.

REFERENCE	CATEGORY	SUPPLIER	DATE	AMOUNT	STATUS
EXP-2026-021	Fuel	TotalEnergies	15/09/2026	€482.35	Approved
EXP-2026-022	Maintenance	Auto Service Brussels	16/09/2026	€726.00	Approved
EXP-2026-023	Tools	FieldTech Supply	18/09/2026	€211.75	Pending
EXP-2026-024	Software	Cloud Services Europe	19/09/2026	€360.00	Approved

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Support

Step 1

Choose the correct category and supplier.

Step 2

Capture amount, date and approval status.

Step 3

Use filters to separate pending and approved expenses.