

# Transactions & Invoices

The Junovy Money connector lets you record transactions, create invoices, and track payments without opening the Junovy Money web app.

## Recording transactions

Ask your AI assistant to record income or expenses directly:

“Record a €120 expense for office supplies, paid today”

“I received €2,500 from Acme Corp for the January invoice”

The assistant will confirm the details before saving. You can specify the amount, category, date, description, and whether it's income or an expense.

## Listing and filtering transactions

Pull up your transaction history with natural language filters:

“Show my expenses from the last 30 days”

“List all income over €1,000 this quarter”

“What transactions are in the 'Marketing' category?”

Results include the date, description, amount, category, and type (income/expense) for each transaction.

## Creating invoices

Generate invoices by describing what you need:

“Create an invoice for €800 to Widget Co for web design services, due in 30 days”

The assistant will create the invoice in Junovy Money with the customer, amount, description, and due date filled in. You can review and send it from the Junovy Money web app, or ask the assistant to send a reminder later.

## Tracking invoice status

Check which invoices are paid, pending, or overdue:

“Show my unpaid invoices”

“Which invoices are overdue?”

“What's the total amount outstanding from all customers?”

## Managing customers and vendors

Look up or manage your business contacts:

“Show me details for customer Acme Corp”

“List my top 5 vendors by total spend”

“What's the outstanding balance for Widget Co?”

# Tips

- When recording a transaction, the assistant will try to match the category automatically. You can always specify one: "Record €50 for lunch, category: meals & entertainment."
- Invoice creation fills in the basics. For complex invoices with multiple line items, it's easier to use the Junovy Money web app.
- You can ask follow-up questions about results: "Now show me just the ones over €500."

## Next steps

- Set up budgets and pull reports: [Budgets & Reports](#)

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