

Accounting

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Tax Documents

Easily generate and export year-end tax reports. The system auto-categorizes transactions and supports exports for:

- Profit & Loss report
- IRS-compliant Mileage report
- Expense report
- 1099 / payments received report

Reports can be downloaded as CSV or PDF and shared directly with your accountant.

Payment Management

Track payments from clients with ease. Automatically log completed signings, mark invoices as paid, and get real-time insights into your earnings. Manage overdue payments, send reminders, and stay on top of your cash flow.

- Filter payments by **30, 60, 90+ days** overdue
- Collecting payment
- Track invoice status (Invoice not sent yet ▪ Invoice sent ▪ Invoice overdue ▪ Paid)
- Send branded invoice and receipt PDFs by email or download

- [Learn more about branded invoices and receipts](#)
 - Optional Square integration for card payments
 - Automatic reminders for overdue invoices
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Mileage Tracking

Distance traveled is calculated automatically for every appointment. Edit mileage when needed and export totals directly into year-end reports.

Expense Tracking

Record and categorize business expenses such as supplies, travel, and marketing. Attach receipts and monitor spending trends to better manage your bottom line. NotaryCentral flags expenses missing receipts and reminds you to upload them so your records remain compliant.

[Learn the details about expense tracking](#)