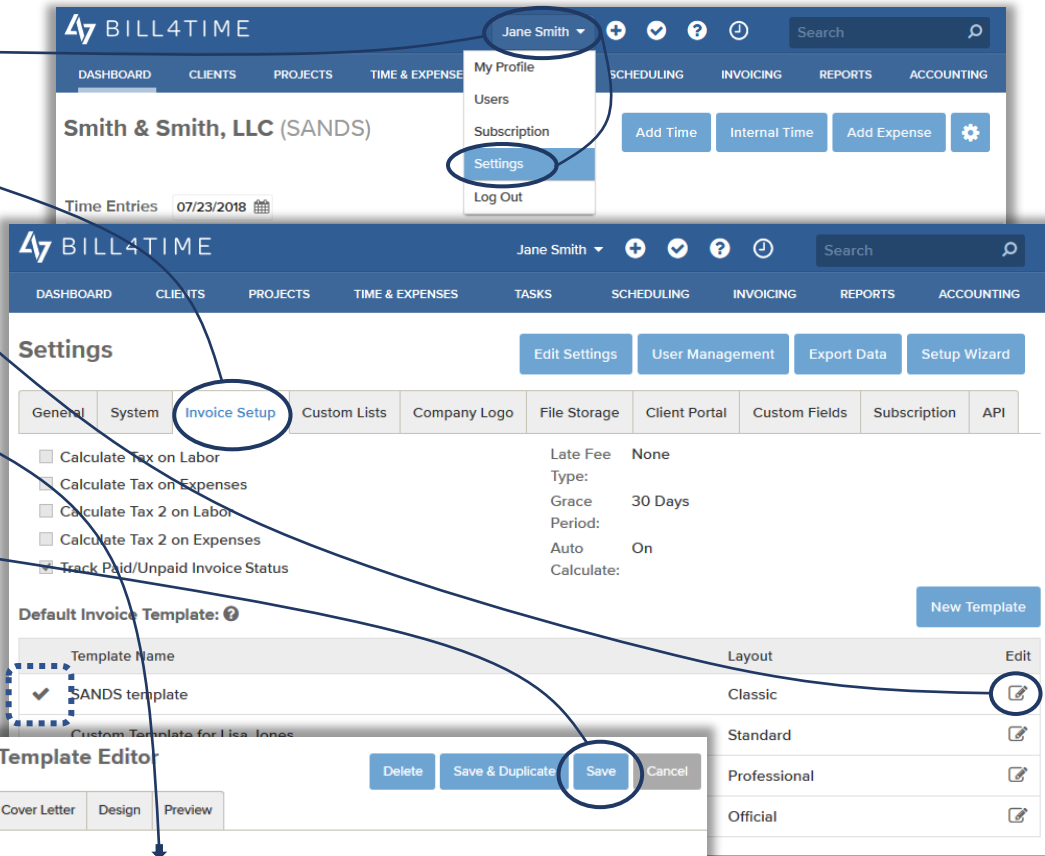


# Invoice Preset Options

To create and/or assign an invoice template to the Account:

- Step 1:**  
Click your name located at the top right and select "Settings".
- Step 2:**  
From there, click on the Invoice Setup tab.
- Step 3:**  
Click the clipboard icon next to the template you have chosen to edit.
- Step 4:**  
Make the desired changes.
- Step 5:**  
Click the Save button when finished.



The check mark indicates the currently selected template. By clicking a different template, you would be switching the default for all clients and projects (that do not have another template selected). This comes in handy if you want to switch the default template on the firm level.

### Invoice Template Editor

Name:

Header Type:

Logo:

Company Details:

- Company Name
- Street Address
- City, State, Zip
- Country
- Phone
- Fax
- Email
- Custom Line:

Client Details:

- Client Name
- Attention
- Street Address
- City, State Zip
- Country
- Phone
- Email
- Custom Line:

Options:

- Group By Project
- Show Services Through Date
- Show Invoice Terms
- Show Billable Hours Totals

# Invoice Preset Options

To create and/or assign an invoice template to the Client/Project:

**Step 1:**  
Click the Clients tab in your menu bar.

**Step 2:**  
Click on the desired client.

**Step 3:**  
Click on the Invoice Presets tab.

**Step 4:**  
Click on the clipboard icon next to the template you have chosen to edit.

**Step 5:**  
Make the desired changes.

**Step 5:**  
Click the Save button.

The screenshot shows the BILL4TIME interface. At the top, the 'CLIENTS' tab is selected in the navigation bar. Below, a table lists clients, with '123 - Frank Cole' selected. The 'Invoice Presets' tab is active for this client, showing a list of templates. The 'Firm Default (SANDS template)' is checked. An 'Invoice Template Editor' modal is open, showing fields for Name, Header Type, Logo, and Company/Client details. The 'Save' button is circled. A dashed box highlights the check mark in the 'Firm Default' row.

Id	Name	Type	City	State	Zip	Account Mgr.	Billed Balance
34A	123 - Frank Cole		Brooklyn	NY	11220	Jane Smith	\$18,406.32
37	321 - ABA client					Tracy Finn	\$2,300.26

Template Name	Design	Edit
<input checked="" type="checkbox"/> Firm Default (SANDS template)	Classic	
<input type="checkbox"/> Custom Template for Lisa Jones.	Standard	

**Invoice Template Editor**

Name: SANDS template

Header Type: Text Header

Logo: Company Default

Company Details: Show

- Company Name
- Street Address
- City, State, Zip
- Country
- Phone
- Fax
- Email
- Custom Line:

Client Details: Show

- Client Name
- Attention

Smith & Smith, LLC  
252 Broadway  
Suite 12  
New York, NY 11245

Client 12345  
Attn: Client Representative  
500 Main St

The check mark indicates the currently selected template. You will also notice the "Firm Default" showing what template is currently set on the Firm level. You can select a different template, so this client and all projects underneath will then switch to a new template and off the default. You can always re-select the default to go back.

**Note:**  
You can also set the template per Project so if you want a template change for one project within a client to not affect other projects, you can change this under the Projects Invoice Presets tab.