Invoice Preset Options

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

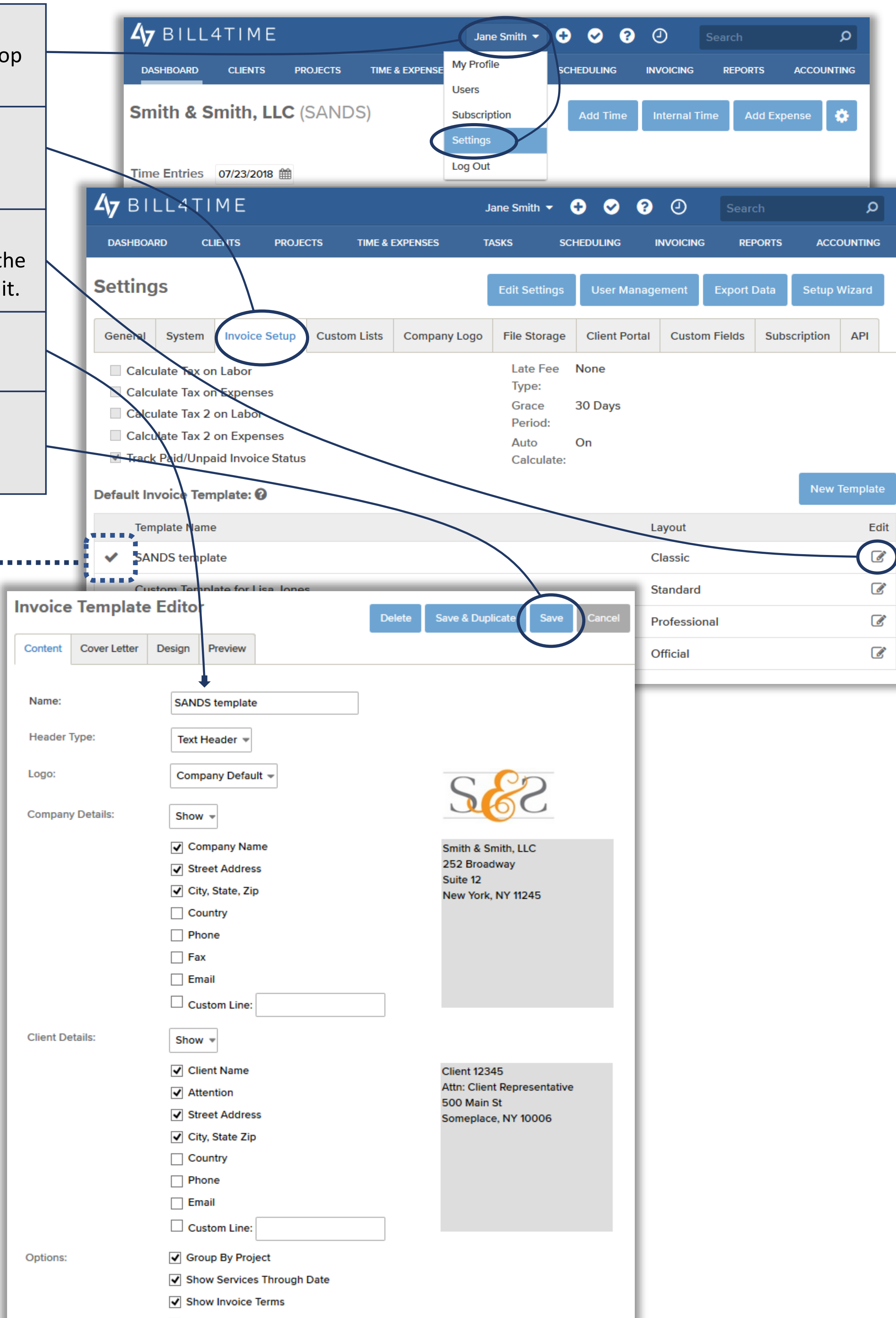
Step 1:
Click your name located at the top right and select “Settings”.

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 Preset Options

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

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

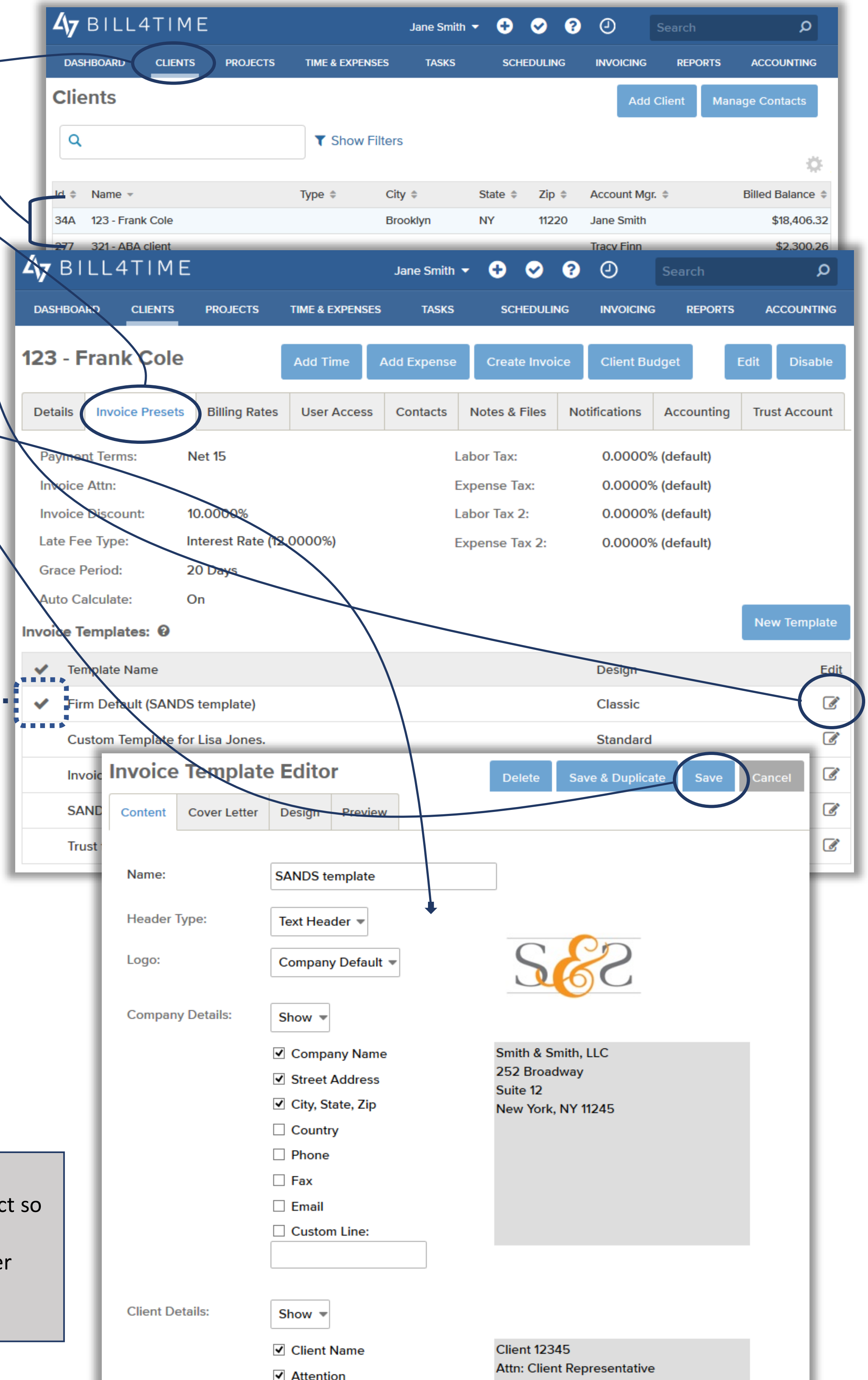
Step 2:
Click on the desired client.

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 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.