

Updating Your Invoice Preset Options

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

STEP 1

Click on your name at the top right of the screen and select "Settings" in the drop-down menu.

STEP 2

Click on the "Invoice Setup" tab.

STEP 3

Click the clipboard icon next to the template you want to edit.

STEP 4

Make any desired changes.

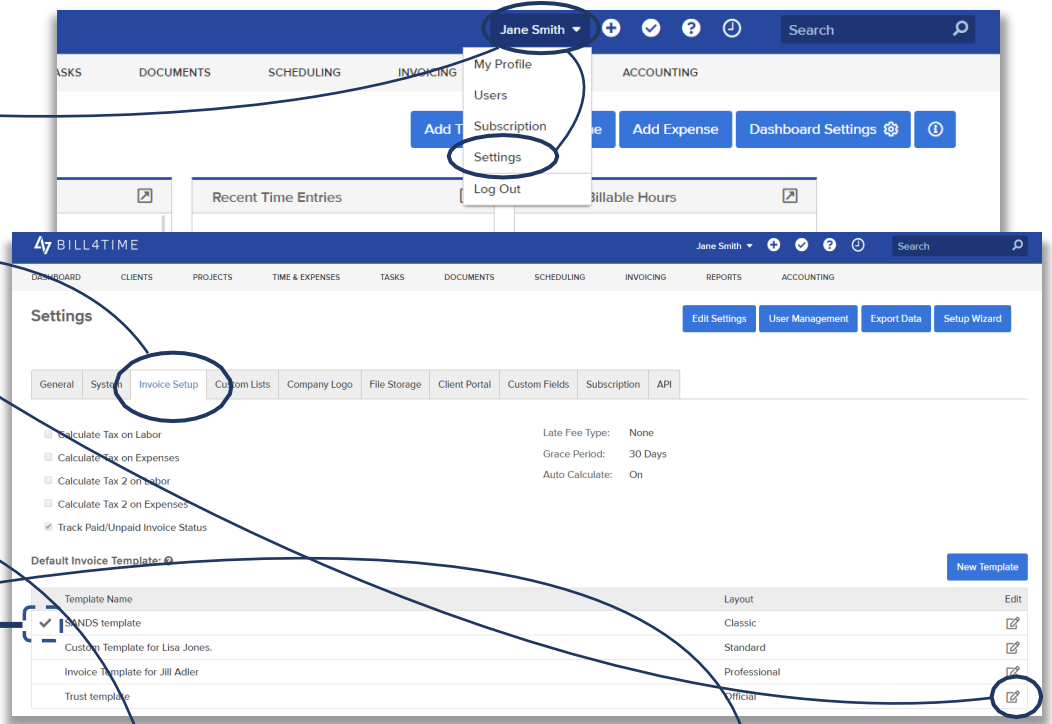
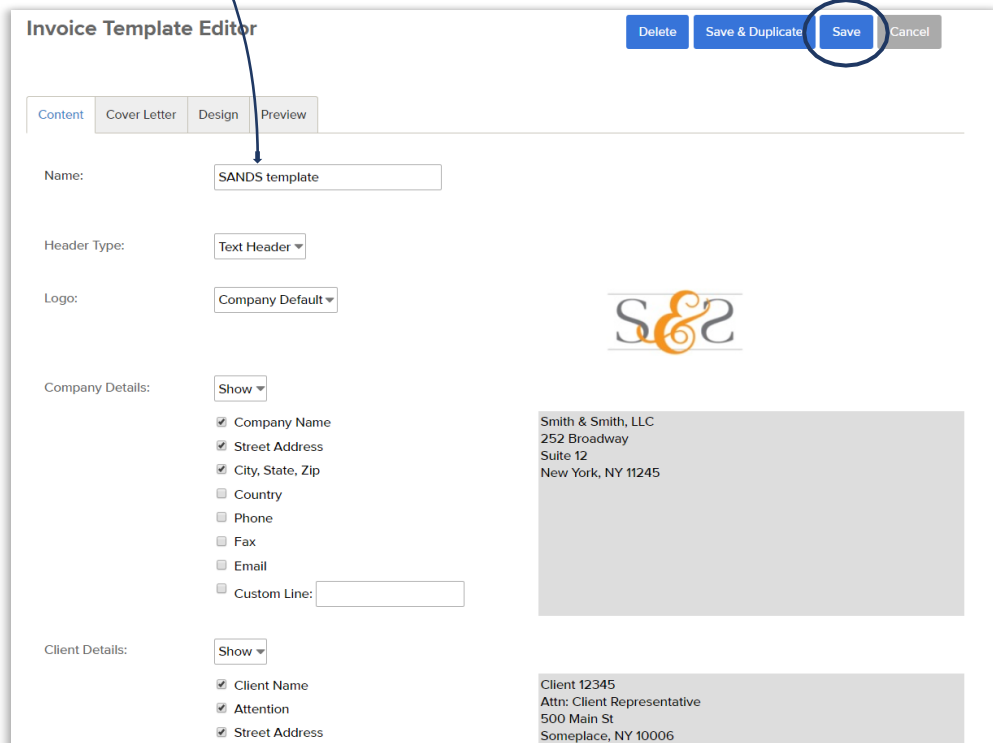
STEP 5

Click on the blue "Save" button.

This check mark indicates which template is currently in use. By clicking on a different template, this switches the default for all clients and projects (that don't already have a specific template selected).

This is handy if you want to switch the default template on a global level.

Note: Any changes/edits saved to your templates will be automatically applied to any existing invoices for clients/matters that already have that template applied.

The screenshot shows the 'Invoice Template Editor' form. The 'Content' tab is active. The form includes fields for Name, Header Type, Logo, Company Details, and Client Details. The 'SANDS template' is selected. The 'Save' button is circled in blue.

Content Tab:

- 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
 - ☒ Street Address

Preview:

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

Client 12345
Attn: Client Representative
500 Main St
Someplace, NY 10006

Invoice Presets for Specific Clients/Projects

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

STEP 1
Click the Clients tab in your menu bar.

STEP 2
Search for and click on the client you want to edit invoice setup for.

STEP 3
Click on the Invoice Presets tab.

STEP 4
Click on the clipboard icon next to the template you would like to edit.

STEP 5
Make any desired changes.

STEP 6
Click on the blue “Save” button.

The screenshot shows the BILL4TIME web application interface. The top navigation bar includes tabs for DASHBOARD, CLIENTS, PROJECTS, TIME & EXPENSES, TASKS, SCHEDULING, INVOICING, REPORTS, and ACCOUNTING. The 'CLIENTS' tab is selected, and a list of clients is displayed. The client '123 - Frank Cole' is selected, and the 'Invoice Presets' tab is active. The 'Invoice Presets' section shows a table of templates with columns for Template Name, Design, and Edit. The 'SANDS template' is selected, and the 'Invoice Template Editor' is open. The editor shows the 'SANDS template' name, header type, logo, and company details. The 'Save' button is highlighted.

CLIENTS

ID	Name	Type	City	State	Zip	Account Mgr.	Billed Balance
34A	123 - Frank Cole		Brooklyn	NY	11220	Jane Smith	\$18,406.32
277	321 - ABA client					Tracy Finn	\$2,300.26

123 - Frank Cole

Payment Terms: Net 15
Invoice Attn:
Invoice Discount: 10.0000%
Late Fee Type: Interest Rate (12.0000%)
Grace Period: 20 Days
Auto Calculate: On

Labor Tax: 0.0000% (default)
Expense Tax: 0.0000% (default)
Labor Tax 2: 0.0000% (default)
Expense Tax 2: 0.0000% (default)

Invoice Templates:

Template Name	Design	Edit
✓ Firm Default (SANDS template)	Classic	
Custom Template for Lisa Jones.	Standard	

Invoice Template Editor

Name: SANDS template
Header Type: Text Header
Logo: Company Default
Company Details: Show
Client Details: Show

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

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

Client 12345
Attn: Client Representative
500 Main St

This checkmark indicates which template is currently selected for this specific client.

You'll also notice the "Firm Default", which indicates the name of the template that is currently selected on your global account level.

You can select a different template, so this client and all projects underneath will then switch to a new template and away from the default. You can always re- select the default to go back.

Note: You can also select a specific template per Project. If you want a template change for a specific project, you can change this under that Project's Invoice Presets tab.