∆7 BILL4TIME

Updating Your Invoice Preset Options

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

					Jane Sn	nith 🗸 🕂 🥑	? 🕘 Search	م
STEP 1					My Profile	\prec		~
Click on your name at the top right	of	DOCUME	NTS SCHEDULING	INVOR	Users	ACCOUNT	ING	
the screen and select "Settings" in t				А	dd T Subscription	e Add Ex	pense Dashboard Set	tings 🕸 🕕
drop-down menu.					Settings	Y		
			Recent Time Entries		Log Out	Billable Hours		
STEP 2								
Click on the "Invoice Setup" tab.	47 BILL4						Jane Smith 👻 🚭 🧭 💡	Search O
	DIASMBOARD	CLIENTS	PROJECTS TIME & EXPENSES	TASKS	DOCUMENTS SC	HEDULING INVOICING	REPORTS ACCOUNTING	
STEP 3	Settings						Edit Settings User Managemen	t Export Data Setup Wizard
Click the clipboard icon next to t	he 、	\sim						
template you want to edit.	General Sy:	stein Invoice Setu	Currom Lists Company Logo	File Storage	Client Portal Custom	Fields Subscription API		
	Salculate	Tax on Labor			1	Late Fee Type: None		
STEP 4	Calculate	Tax on Expenses				Grace Period: 30 Days Auto Calculate: On		
Make any desired changes.		Tax 2 on Expenses						
	C Track Paic	d/Unpaid Invoice Sta	atus					
STEP 5	Default Invoic	e Template: Ø						New Template
Click on the blue "Save" button.	Template						Layout	Edit
		template Template for Lisa Jo	ones.				Classic	ď
	Invoice	Template for Jill Adle					Professional	
	Trust ten	mplate					official	
							\rightarrow	
I	Invoice Template	Editor				Delete Save & Dup	olicate Save Cancel	
This check mark indicates								
which template is currently	Content Cover Letter Design Preview							
in use. By clicking on a	Content	Design						
different template, this	Name:	SANDS ten	nplate					
switches the default for all								
clients and projects (that	Header Type:	Text Heade	er 💌					
don't already have a specific								
template selected).	Logo:	Company E	Default ▼		C	20		
This is handy if you want to	Company Details:	Show -						
switch the default template		Compan	v Name		Smith & Smith, L	LC		
on a global level.		Street A			252 Broadway Suite 12			
		 City, Stat Country 	te, Zip		New York, NY 11	245		
······		Phone						
		E Fax						
		Email Custom	Line:					
Note: Any changes/edits		Susto	•					
saved to your templates will	Client Details:	Show -						
be automatically applied to		Client Na	ame		Client 12345	ac ontativo		
any existing invoices for		 Attention Street A 			Attn: Client Repr 500 Main St			
clients/matters that already		Street A	aa.coo	-	Someplace, NY	0000		
have that template applied.								

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

	₄ , bill4time	Jane S	mith 🗕 🚭 💡 🕘 Search	٩
	DASHBOARD CLIENTS PROJEC	TS TIME & EXPENSES TAS	ks scheduling invoicing repo	RTS ACCOUNTING
STEP 1 Click the Clients tab in your menu bar.	Clients		Add Client	Manage Contacts
Click the clients tab in your menu bar.	Q	▼ Show Filters		
STEP 2				0
Search for and click on the client you	Id 🗢 Name 👻	Type ≑ City ≑	State	Billed Balance ≑
want to edit invoice setup for.	34A 123 - Frank Cole	Brooklyn	NY 11220 Jane Smith	\$18,406.32
STEP 3	A7 BILL4TIME	Jane Smi	Tracy Finn th +	\$2.300.26 O
Click on the Invoice Presets tab.		TIME & EXPENSES TAS		
	DASHBOARD CLIENTS PROJECTS	TIME & EXPENSES TASH	ks scheduling invoicing ref	PORTS ACCOUNTING
STEP 4	123 - Frank Cole	Add Time Add Expens	se Create Invoice Client Budget	Edit Disable
Click on the clipboard icon next to the				
template you would like to edit.	Details Invoice Presets Billing Rat	tes User Access Contacts	Notes & Files Notifications Accourt	Trust Account
STEP 5	Payment Terms: Net 15		Labor Tax: 0.0000% (defaul	t)
Make any desired changes.	Invoice Attn:		Expense Tax: 0.0000% (defaul	t)
, 3	Invoice Discount: 10.0000%		Labor Tax 2: 0.0000% (defaul	t)
STEP 6	Late Fee Type: Interest Rate	(12.0000%)	Expense Tax 2: 0.0000% (defaul	t)
Click on the blue "Save" button.	Grace Period: 20 Days			
	Auto Calculate: On	$ \rightarrow $		New Template
	Invoice Templates: 0			
	Template Name		Design	Edit
	Firm Default (SANDS template)		Classic	
	Custom Template for Lisa Jones		Standard	
·····	Invoic Invoice Templat	e Editor	Delete Save & Duplicate Save	ave Cancel
This checkmark indicates which	SANE Content Cover Letter	Design Preview		
template is currently selected for this specific client.	Trust			ľ
specific client.	Name:	SANDS template		-
You'll also notice the "Firm Default",	Header Type:	Text Header 🔻		
which indicates the name of the	Lange		CPD	
template that is currently selected on	Logo:	Company Default 💌	260	
your global account level.	Company Details:	Show -		
		✓ Company Name	Smith & Smith, LLC	_ 1
You can select a different template, so		Street Address	252 Broadway Suite 12	
this client and all projects underneath		City, State, Zip	New York, NY 11245	
will then switch to a new template and				
away from the default. You can always re- select the default to go back.		Phone Fax		
		Email		
		Custom Line:		
Note: You can also select a specific				
template per Project. If you want a template change for a specific project,	Client Details:	Sharry		
you can change this under that Project's	Cirent Details:	Show -		
Invoice Presets tab.		 Client Name Attention 	Client 12345 Attn: Client Representative	
1		 Attention 	500 Main St	