Updating Your Invoice Preset Options

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

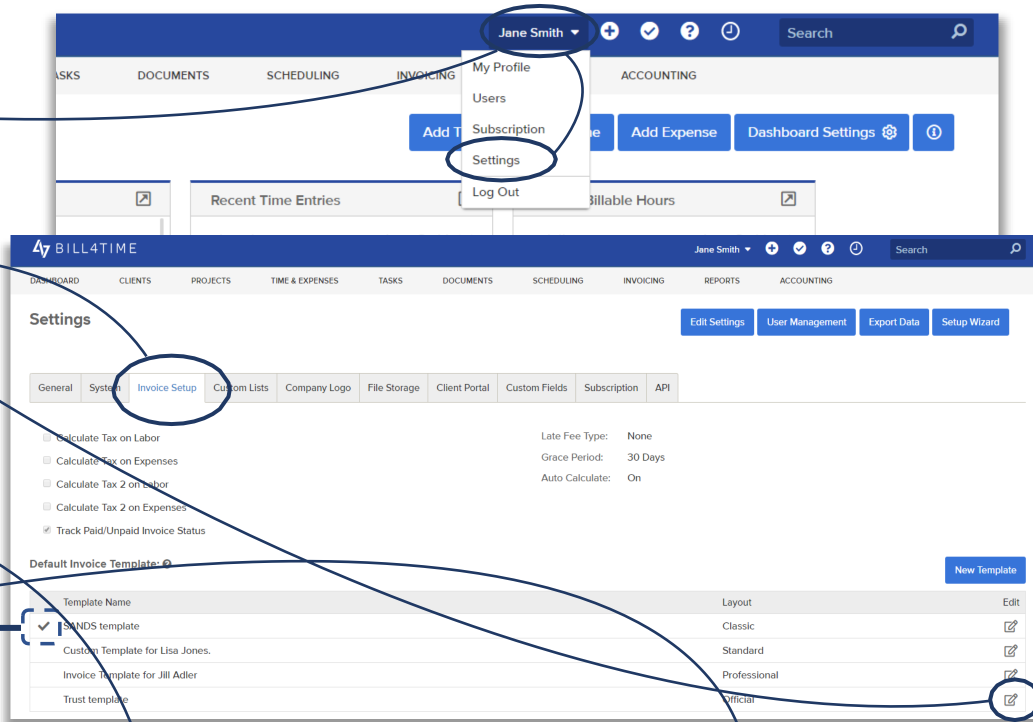
STEP 1
Click on your name at the top right of the screen and select “Settings” in the drop-down menu.

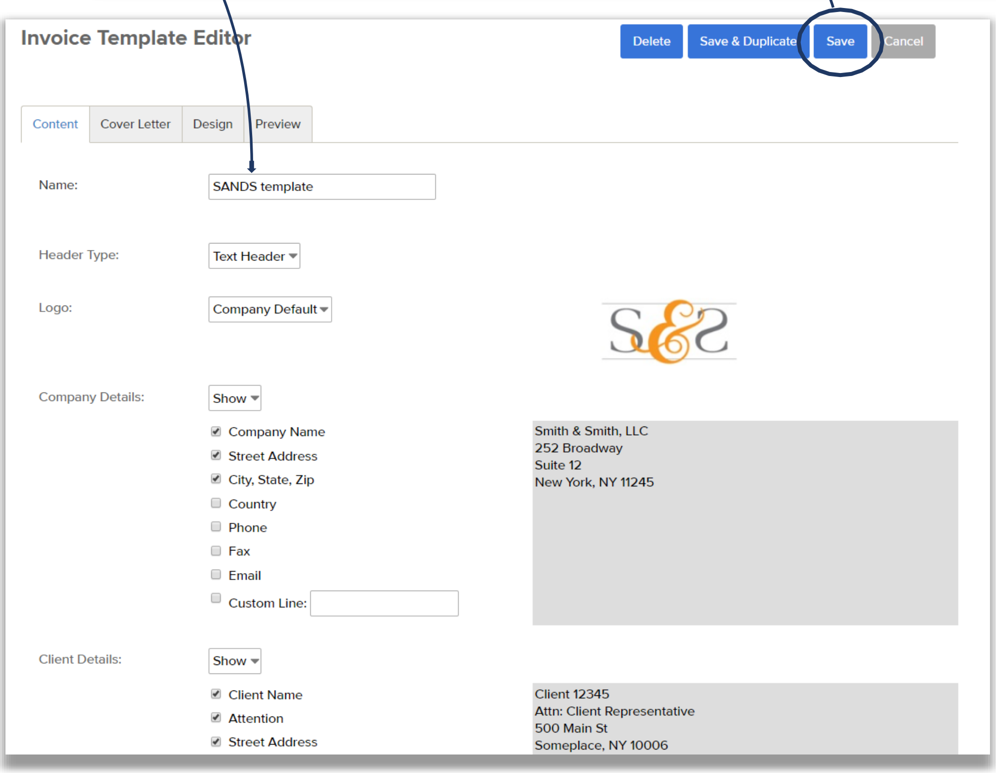
STEP 2
Click on the “Invoice Setup” tab.

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.

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.

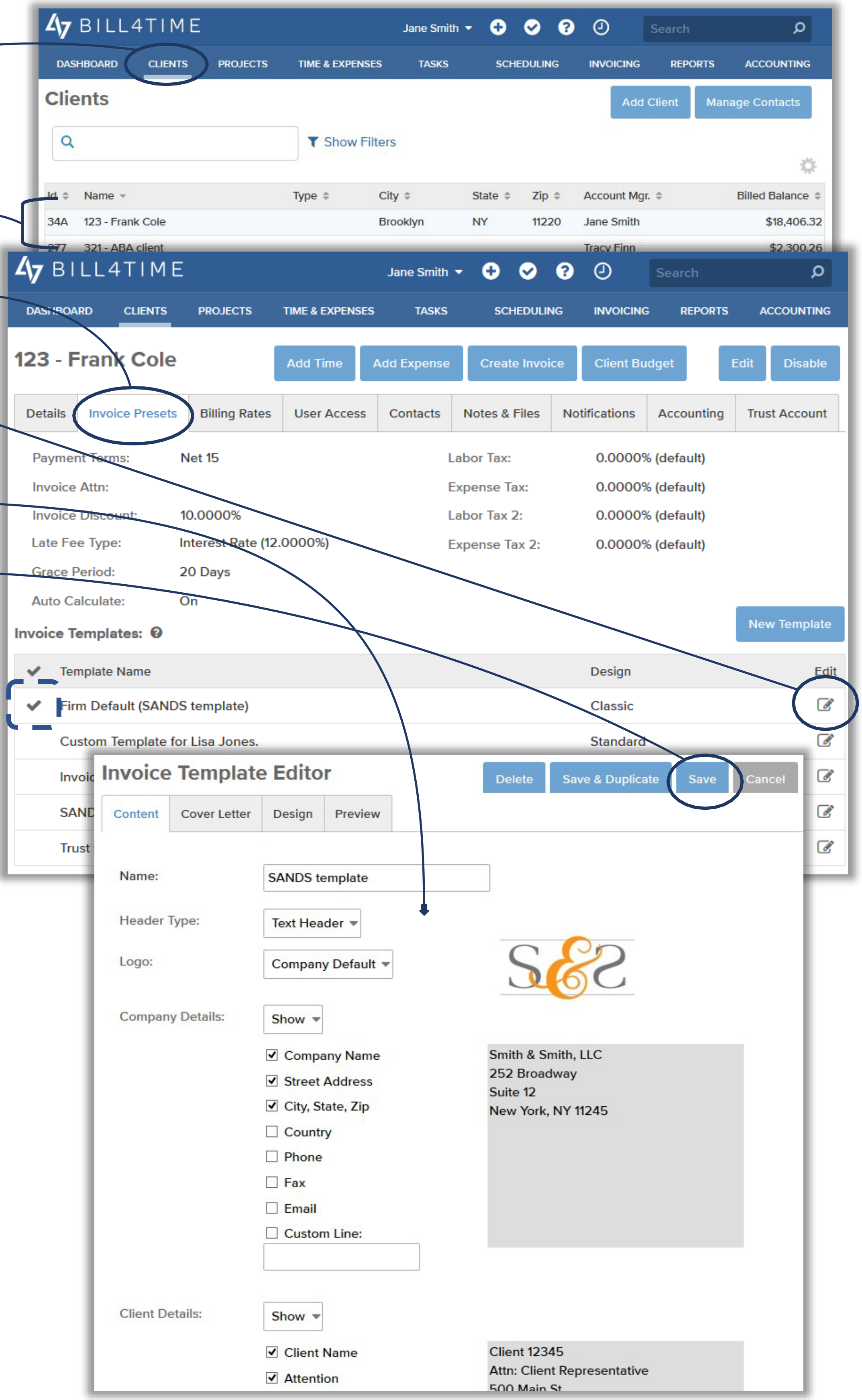
STEP 2
Search for and click on the client you want to edit invoice setup for.

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.



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.