Understanding the basics of client invoices

Goal: Learn about the basics of client invoices, including how to view, preview, print, finalize, and reprint or reissue them.

In this quick lesson

With Ajera, the client invoicing process begins when you set up a billable project. Ajera automatically creates a draft client invoice for you. The rest of the client invoicing process is as follows:

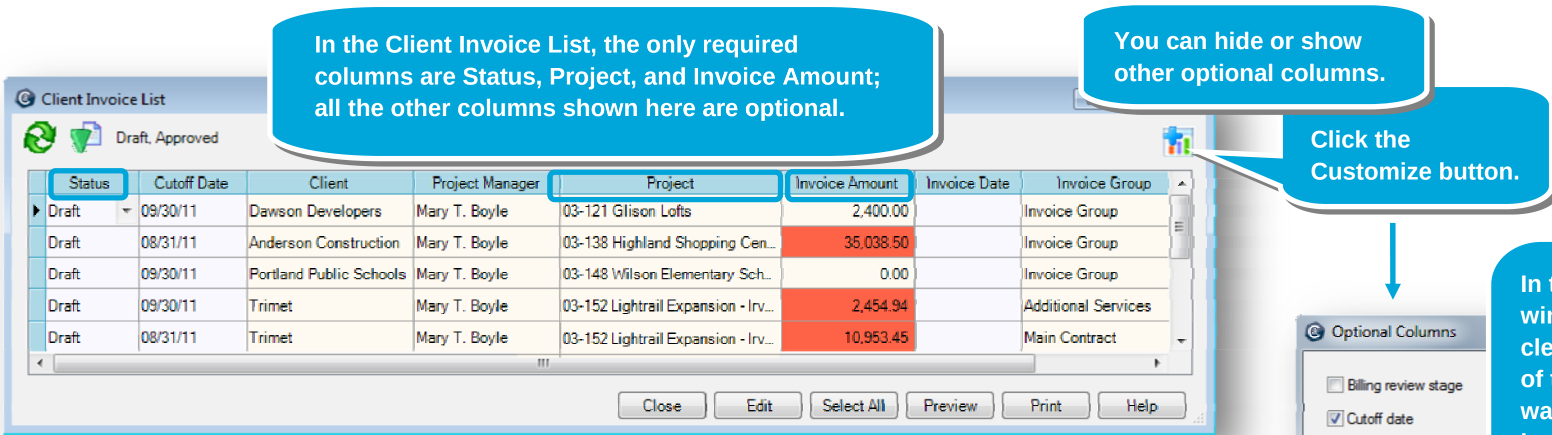
1. As you enter billable time and expense transactions, Ajera attaches them to the draft invoice, which you can view at any time.
2. When you're ready to bill the project, you can preview or print a draft invoice with a pre-billing worksheet for your project managers to review. (For information about the billing review process, see the *Understanding the billing review process* quick lesson.)
3. You may make changes to the draft invoice based on the review. (For more information, see the *Changing a client invoice* quick lesson.)
4. When you're ready to send the invoice to your client, you print a final invoice.
5. If needed, you can reprint or reissue a final invoice.

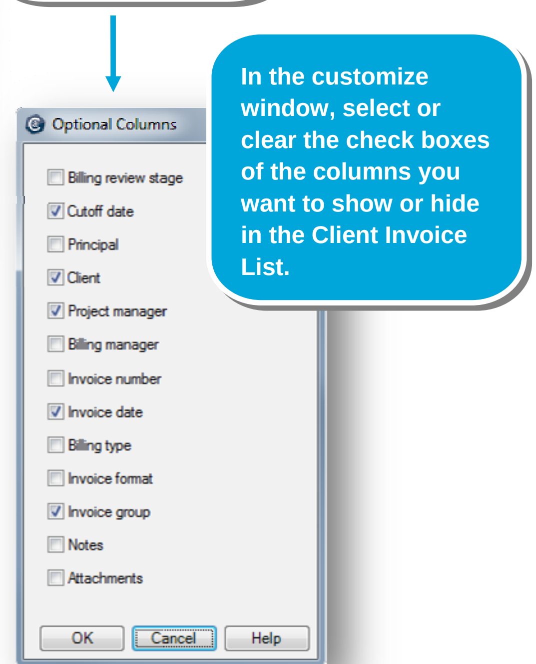
This quick lesson describes how to perform the following tasks: viewing, previewing, printing, and reprinting or reissuing.

Step 1: View client invoices

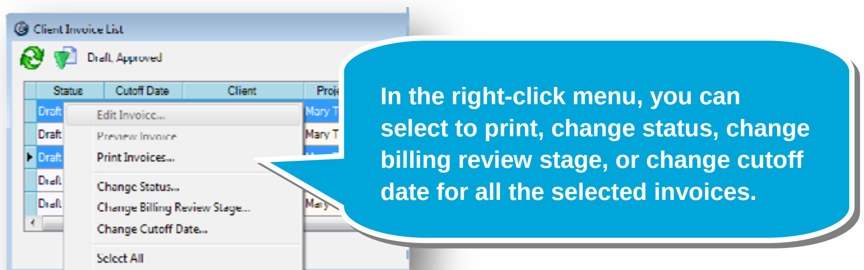
You can view invoices at any time in the Client Invoice List. Here, you can do the following: customize the list so it displays only the columns you want, print or change multiple invoices at one time, determine if your billing rate tables are inaccurate, or select an invoice to view in detail.

1. Click **Manage** > **Client Invoices**. The Client Invoice List appears.
2. The list is automatically sorted by the Project column. To sort by another column, just click that column heading.





3. To select multiple invoices, click an invoice and Shift-click or Control-click the others. You can then right-click and select to print or change them.

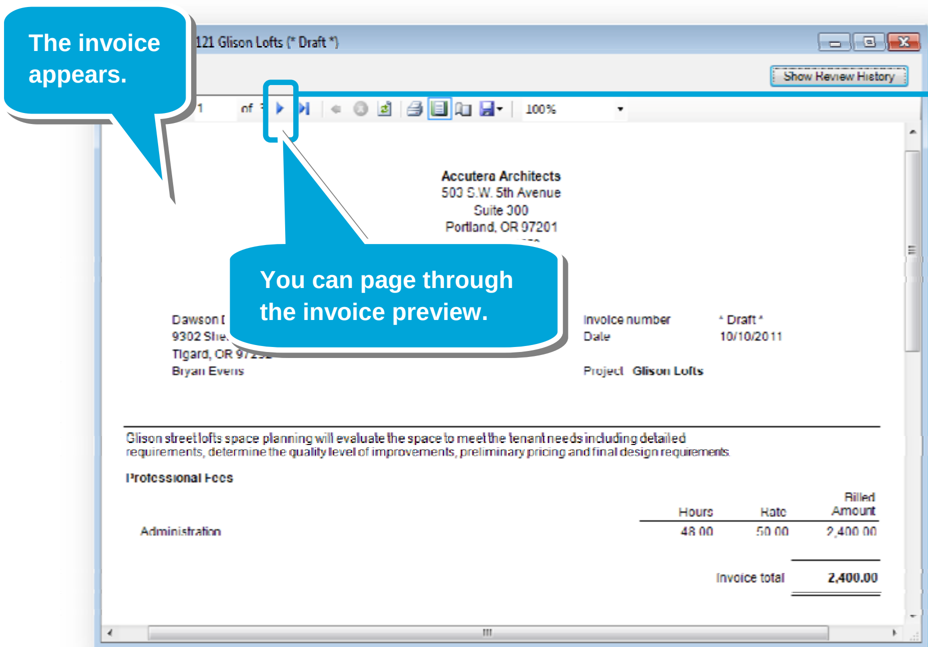


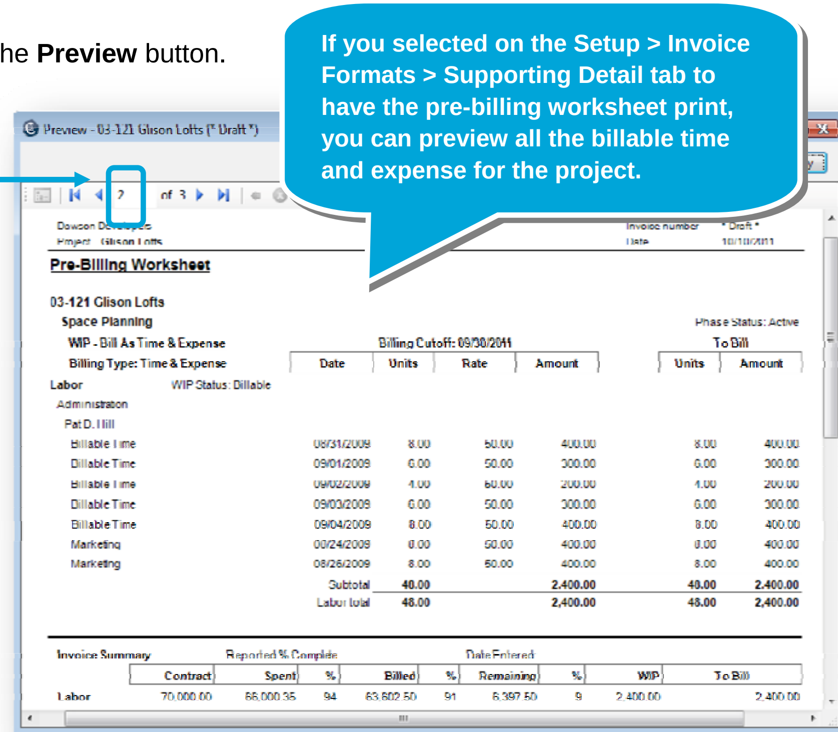
4. To tell if your billing rate tables may be inaccurate, look for the red and yellow invoice amounts:
   - **Red invoice amount:** This invoice exceeds the contract amount.
   - **Yellow invoice amount:** This invoice contains at least one zero-billed amount.
5. To view invoice detail, select the invoice in the list and click the **Edit** button.

Step 2: Preview and print a draft client invoice

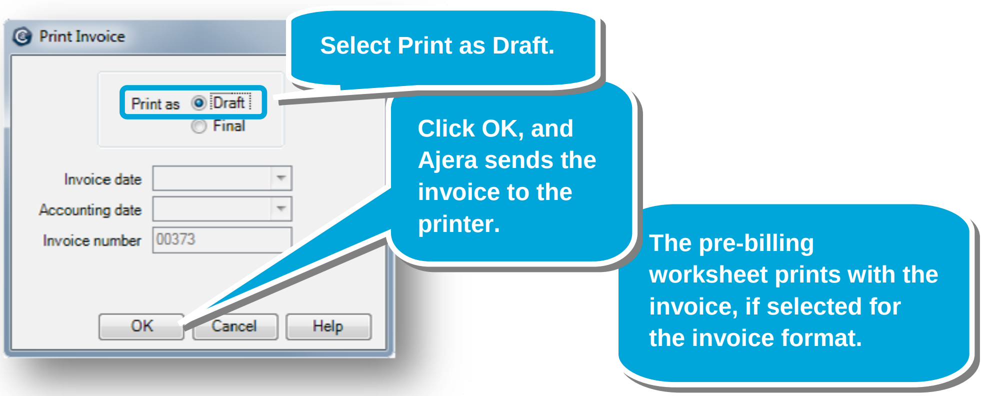
Depending on your firm's billing process, you may want to preview or print a draft invoice and a pre-billing worksheet for the project manager to review.

1. To preview a client invoice, select the invoice in the Client Invoice List and click the **Preview** button.





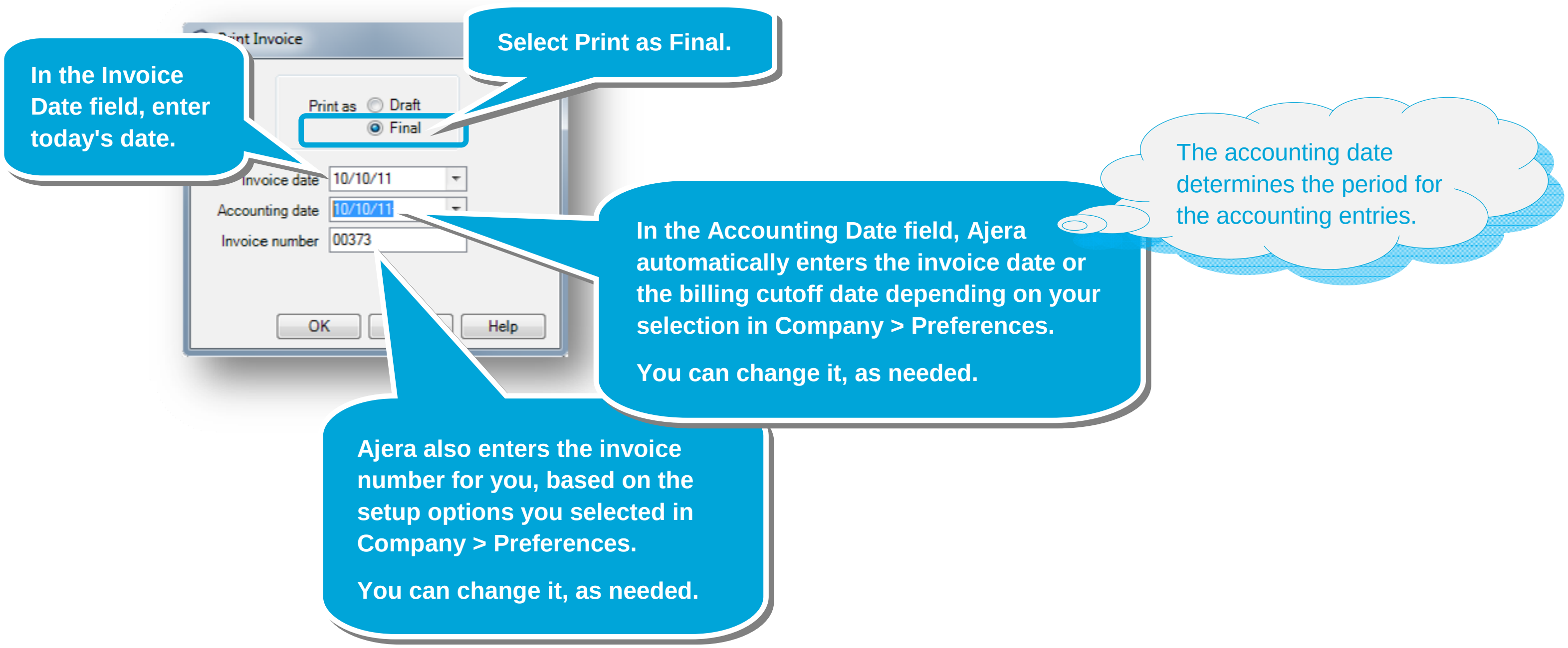
2. To print a draft invoice, select the invoice in the Client Invoice List and click the **Print** button. The Print Invoice window appears.



Step 3: Print a final client invoice

After making your project manager's changes to the draft invoice (see the *Changing a client invoice* quick lesson) and previewing the changes, you're ready to print a final invoice. To print a final invoice, the status of the invoice must be Draft or Approved.

1. In the Client Invoice List, select an invoice and click the **Print** button.
2. In the Print Invoice window, do the following:



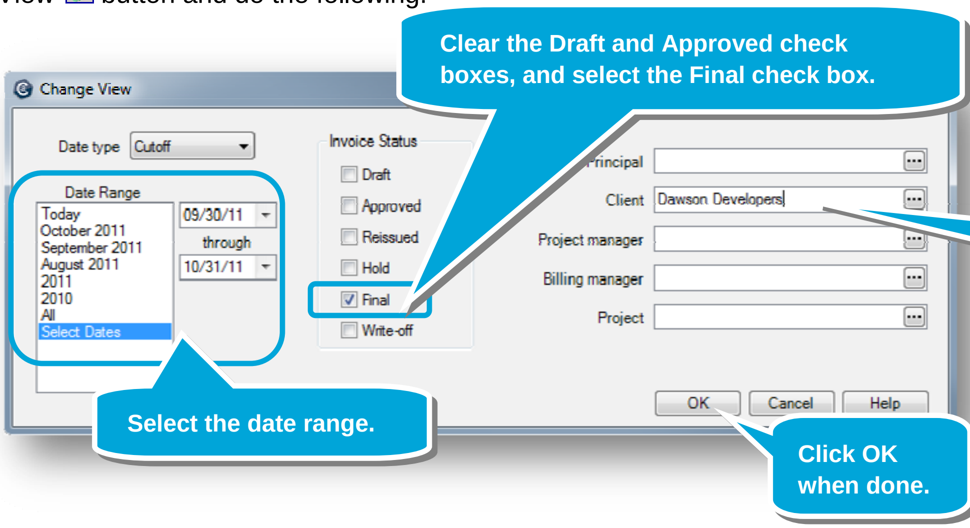
3. After you click the **OK** button, Ajera sends the invoice to your printer and changes the invoice status to Final.
4. When you print a final invoice, Ajera automatically creates a new draft invoice (if the project is still active). In this way, the billing process for the project starts accumulating information for the next invoice.

Step 4: Reprint or reissue a client invoice

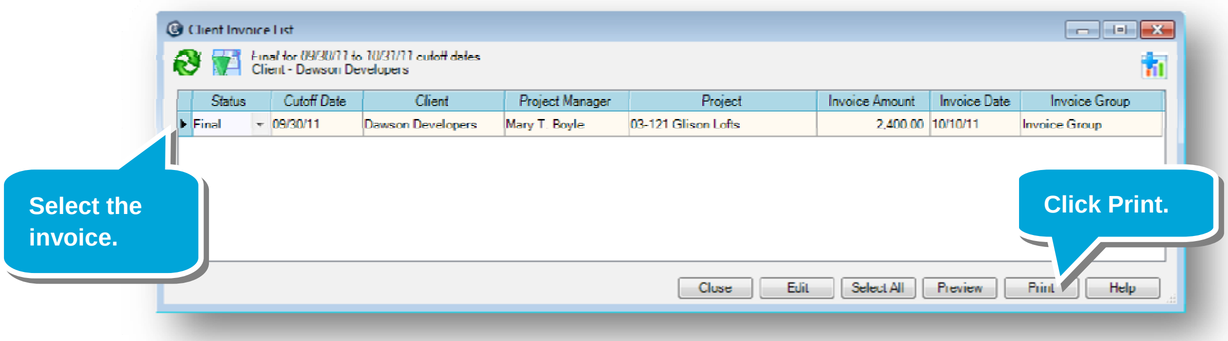
After printing an invoice as final, you may need to reprint or reissue it. For example, you may reprint an invoice for a client who needs a copy of an invoice you sent out months ago, or you may reissue a final invoice to correct an error.

Reprinting a client invoice

1. The Client Invoice List automatically displays invoices with the status of Draft or Approved. Click the Change View button and do the following:



2. Do the following to reprint the invoice:



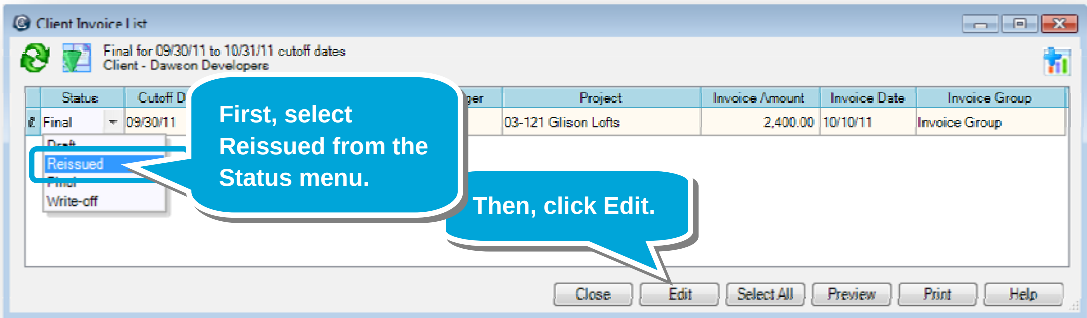
3. The invoice opens in Adobe Acrobat so you can save and email it, or print it.

Step 4: Reprint or reissue a client invoice (continued)

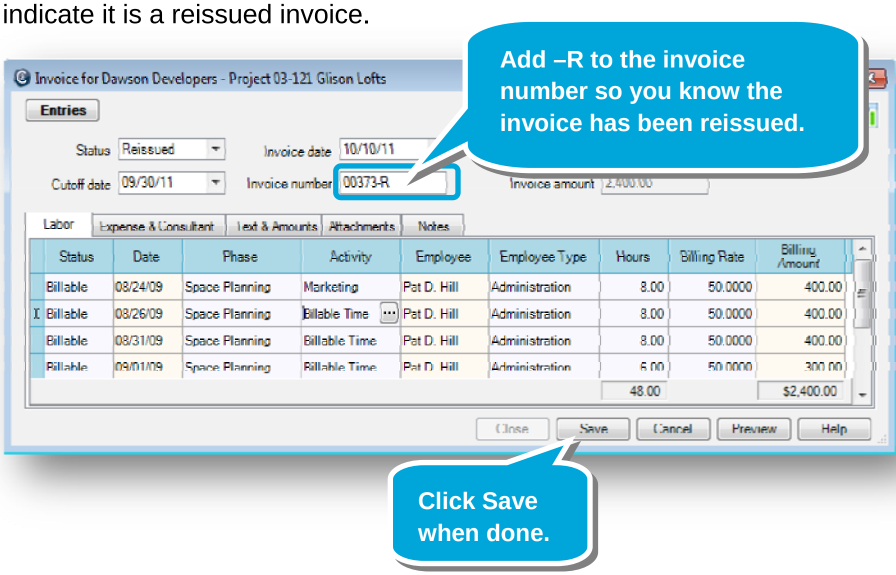
Reissuing a client invoice

1. In the Client Invoice List, change the status of the invoice to Reissued.

   Note: However, if you wanted to include additional time and expense transactions from the existing draft invoice, you would change the status to Draft.



2. Make any changes to the invoice. For example, correct an amount and change the invoice number to indicate it is a reissued invoice.



Summary

This quick lesson has shown you how to view, preview, print, finalize, and reprint and reissue client invoices.

View these related quick lessons:

- Changing a client invoice
- Understanding the billing review process