Use this quick reference to see how and where to change the various components of a client invoice.

In this quick reference

Tips on working with invoice components

Select to print them
For some invoice components to print on an invoice, you must first select to print them, even if you already entered the text or image.

Understand how different text prints on different invoices
You often enter text for an invoice component in different areas of Ajera, depending on if you want to print it on all invoices or on only some invoices. If you enter text in more than one place, the text you enter for the lowest level overrides the others and prints on the invoice.

For example, for header text, you can enter some or all of the following:

- Text that prints on all invoices.

- Text that prints on only invoices for a specific project.

- Text that prints on only a specific invoice.

Heading area

Logo

Enter it here
Company > Preferences > Billing tab > Invoice and Statement Logo field

Select to print it
Setup > Invoice Formats > General tab > Logo check box

Project ID and description (name)

Enter it here
Setup > Projects > Project Info tab > General subtab > ID field and Description field

Select to print the project ID
Setup > Invoice Formats > General tab > Print Project area > ID check box

Make the project ID and name bold or uppercase
Setup > Invoice Formats > General tab > Print Project area > Bold and/or Uppercase check box

Billing contact

Enter it here
Setup > Projects > Project Info tab > project or invoice group > Invoice subtab > Billing Contact field

Select if (and where) you want to print it
Setup > Invoice Formats > General tab > Other Positions area > Billing Contact field

Header text

Enter text here that prints on all invoices
Company > Preferences > Billing tab > Invoice Header Text field

Enter text here that prints on only invoices for a specific project
Setup > Projects > Project Info tab > Project or invoice group > Invoice subtab > Header Text field
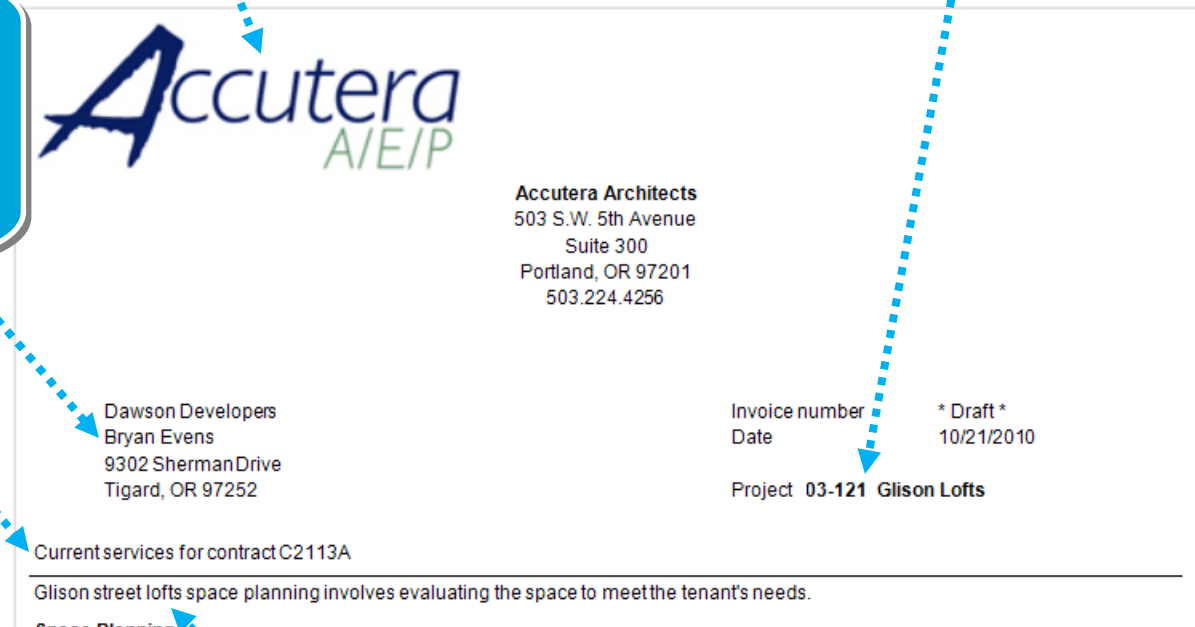
Enter text here that prints on only a specific invoice
Manage > Client Invoices > Text & Amounts tab > Invoice Text area > Header field

Select to print it
Setup > Invoice Formats > General tab > Print Project area > Text field

Scope

Enter it here
Setup > Projects > Project Info tab > Project or invoice group > Invoice subtab > Scope field

Select if (and where) you want to print it
Setup > Invoice Formats > General tab > Other Positions area > Project Scope field

Accutera
A/E/P

Accutera Architects
503 S.W. 5th Avenue
Suite 300
Portland, OR 97201
503.224.4256

Dawson Developers
Bryan Evens
9302 Sherman Drive
Tigard, OR 97252

Invoice number   * Draft *
Date   10/21/2010

Project 03-121 Glison Lofts

Current services for contract C2113A

Glison street lofts space planning involves evaluating the space to meet the tenant's needs.

Space Planning

2

Main section (time and expense billing)

Phase description (name) and ID

Enter it here
Setup > Projects > Project Info tab > Phase > General subtab > Description field (but any text in the Invoice subtab > Billing Description field overrides it)

Select to print the ID
Setup > Invoice Formats > Time & Expenses tab > ID check box for either the Primary Group or Secondary Group field that has Phase selected

Make the phase name and ID bold or uppercase
Setup > Invoice Formats > Time & Expenses tab > Bold and/or Uppercase check box for either the Primary Group or Secondary Group field that has Phase selected

Phase text

Enter it here
Setup > Projects > Project Info tab > Phase or billing group > Invoice subtab > Invoice Text area > Phase field

Select to print it
Setup > Invoice Formats > Time & Expenses tab > Text check box for either the Primary Group or Secondary Group field that has Phase selected

Activity type text

Enter it here
Setup > Projects > Project Info tab > Phase or billing group > Invoice subtab > Invoice Text area > Labor, Expense, or Consultant field

Select to print it
Setup > Invoice Formats > Time & Expenses tab > Text check box for either the Primary Group or Secondary Group field that has Activity Type selected

Activity type subtotal

Select to print it
Setup > Invoice Formats > Time & Expenses tab > Subtotal check box for either the Primary Group or Secondary Group field that has Activity Type selected

Activity type heading

Enter a heading other than Labor, Expenses, or Consultant here
Setup > Invoice Formats > Time & Expenses tab > Labor, Expense, or Consultant subtab > Description field

Make it bold or uppercase
Setup > Invoice Formats > Time & Expenses tab > Bold and/or Uppercase check box for either the Primary Group or Secondary Group field that has Activity Type selected

Invoice total

Format it
Set up > Invoice Formats > General tab > Invoice Total area. Select the Bold, Box, and Underline check boxes, as needed.

Glison street lofts space planning in

Space Planning

Billing reflects this year's rates.

Labor

Labor is billed hourly for the time spent on the project. Please direct questions to Mary Boyle.

	Hours	Rate	Billed Amount
Principal	2.00	215.00	430.00
Project Manager	18.00	115.00	2,070.00
Senior Architect	18.00	105.00	1,890.00
Architect	48.00	90.00	4,320.00
Intern Architect	24.00	70.00	1,680.00
Labor subtotal	110.00		10,390.00

Reimbursables

	Units	Rate	Billed Amount
Reproduction			48.30
Prints	20.00	2.00	40.00
Travel			514.63
Miles	195.00	0.40	78.00
Telephone			14.67
Models			86.25
Copies	75.00	0.20	15.00
			796.85

Consultant

	Units	Rate	Billed Amount
Other Consultant			
BVA Group			690.00
			11,876.85
Invoice total			**11,876.85**

3

Main section (fee type billing)

Phase description (name) and ID

Enter it here
Setup > Projects > Project Info tab > Phase > General subtab > Description field (but any text in the Invoice subtab > Billing Description field overrides it)

Select to print the ID
Setup > Invoice Formats > Fee Type tab > Print Phase area > ID check box

Make the phase name and ID bold or uppercase
Setup > Invoice Formats > Fee Type tab > Print Phase area > Bold and/or Uppercase check box

Amount columns

Select the columns to print
Setup > Invoice Formats > Fee Type tab > Amount fields

Change the column headings
Setup > Invoice Formats > Fee Type tab > Heading field

Invoice number: * D
Date: 09/

PROJECT: 04-115 STEPHEN
KITCHEN

Remodel of Stephenson kitchen. Fee includes resdesign of existing space plus 500 square foot addition.

Description	Contract Amount	Prior Billed	Current Billed
Remodel Design	42,500.00	0.00	17,500.00
Redesign of existing dining area and kitchen			
Total	42,500.00	0.00	17,500.00

Invoice subtotal	17,500.00
Sales tax	1,400.00
Invoice total	18,900.00

Phase text

Enter it here
Setup > Projects > Project Info tab > Phase or billing group > Invoice Text area > Phase field

Select to print it
Setup > Invoice Formats > Fee Type tab > Print Phase area > Text check box

Invoice style

Select a vertical or horizontal orientation
Setup > Invoice Formats > Fee Type tab > Style field

Invoice total

Format it
Set up > Invoice Formats > General tab > Invoice Total area. Select the Bold, Box, and Underline check boxes, as needed.

4

Signature area

1. To hide the signature area, or show it and select where to print it, select **Setup** > **Invoice Formats** > **General tab** > **Approvals area** > **Position field**.

2. In the Style field, select to print either a **signature line only**, or a **signature block** (which can include the signature line, signer's name, and signer's title).

Print signature line only
Setup > Invoice Formats > General tab > Approvals area > Style field > Signature Line

Print signature block
Setup > Invoice Formats > General tab > Approvals area > Style field > Signature Block

Signer's name

Select to print it, and select the name to print
Setup > Invoice Formats > General tab > Approvals area > Signer field

If you select billing manager, project manager, or principal in charge, Ajera prints the name of the person performing that role on the project (as entered in Setup > Projects > Project Info tab > Project or invoice > General or Invoice subtab).

Signer's title

Select to print it, and enter the title to print
Setup > Invoice Formats > General tab > Approvals area > Title field

Type the title to the right, or select From Employee to print the title for the employee from Setup > Employees.

Accutera
A/E/P

Dawson Developers
Project 03-121 Glison Lofts

Invoice number
Date

Invoice Summary

Description		Prior Billed	Tota Bille
SPACE PLANNING		56,903.92	68,780.7
Billing reflects this year's rates.			
	Total	56,903.92	68,780.7

Approved by:

Mark A. Royce
V.P. Operations

Description
SPACE PLANNING
Billing reflects this year's rates.

Approved by:_____

Footer area

Footer text prints on only the last page of
the invoice before the supporting detail.

The page footer prints on every page.

Footer text

Enter text here that prints on all invoices
**Company > Preferences > Billing tab > Invoice Footer
Text field**

Enter text here that prints on only invoices for a
specific project
**Setup > Projects > Project Info tab > project or
invoice group > Invoice subtab > Footer Text field**

Enter text here that prints on only a specific invoice
**Manage > Client Invoices > Text & Amounts tab >
Invoice Text area > Footer field**

Additional services available on request

Dawson Developers   Invoice number: * Draft *   Invoice date: 09/02/2010

Page 2 of 7

Page footer

Enter it here
**Setup > Invoice Formats > General tab > Page Footer
area > Left, Center, and Right fields for the information
you want to print in these places of the footer**

Page number

Select to print it
**Setup > Invoice Formats > General tab >
Other Positions area > Page Number field**

Invoice summary

Invoice summary

Select if (and where) you want to print it

Setup > Invoice Formats > Invoice Summary tab > Position field

Accutera Architects
503 S.W. 5th Avenue
Suite 300
Portland, OR 97201
503.224.4256

Dawson Developers
Bryan Evens
9302 Sherman Drive
Tigard, OR 97252

Invoice number
Date:

Project: 03-12

Amount columns

Select the columns to print
Setup > Invoice Formats > Invoice Summary tab > Amount fields

Change a column heading
Setup > Invoice Formats > Invoice Summary tab > Heading field

Current services for contract C2113A

Glison street lofts space planning involves evaluating the space to meet the tenant needs.

Invoice summary heading

Enter it here
Setup > Invoice Formats > Invoice Summary tab > Heading field

Invoice Summary

Description	Prior Billed	Total Billed	Current Billed
SPACE PLANNING	56,903.92	68,780.77	11,876.85
Billing reflects this year's rates.			
Total	56,903.92	68,780.77	11,876.85

Phase description (name) and ID

Enter it here
Setup > Projects > Project Info tab > Phase > General subtab > Description field (but any text in the Invoice subtab > Billing Description field overrides it)

Select to print the ID
Setup > Invoice Formats > Invoice Summary tab > Print Phase area > ID check box

Make the phase name and ID bold or uppercase
Setup > Invoice Formats > Invoice Summary tab > Print Phase area > Bold and/or Uppercase check box

Phase text

Enter it here
Setup > Projects > Project Info tab > Phase or billing group > Invoice subtab > Invoice Text area > Phase field

Select to print it
Setup > Invoice Formats > Invoice Summary tab > Print Phase area > Text check box