

Follow the instructions in this quick reference for some basic changes you can make using the Client Invoice Designer.

**Important!** The Client Invoice Designer is Microsoft Reporting Services with Ajera data preloaded. In most cases, you need to have some knowledge of Microsoft Reporting Services to accomplish your goals.

As you explore and experiment, if you want to discard your changes and start over by returning to the standard invoice format, close the Client Invoice Designer, and click the **Standard** button on the Invoice Format window.

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### Before you begin

Before getting started, be sure to review all the information available to you in:

**Ajera Help > Contents > Invoice formats > Client Invoice Designer.**

## The workspace

### Where to work

The **Layout** tab is your workbench for changing the text and other information that appears on the invoice.

The **Preview** tab shows you the result of your changes on an invoice.

Go between the **Layout** and **Preview** tab as you make changes.

### What's in the workspace

The workspace contains only the data from the Ajera database that is related to an invoice.

### Empty workspace

If the workspace is empty when you open it, click the **Solution Explorer** icon. In the Solution Explorer window, select the **Reports** folder > **AjeraCustomInvoiceFormat.rdl**.

**Report Datasets window**

**Solution Explorer icon**

**Layout tab**

**Preview tab**

**Solution Explorer window**

The client invoice layout is divided into tables that represent parts of the invoice. Tables contain fields that determine what prints on the invoice.

When you click a field in a table, icons appear in the left gutter to identify each row that is part of the table. Then, click this box to highlight all the items in the table.

## Understanding the types of fields

**Fields beginning with =Parameters are created using parameters.**  
You can add parameter fields, such as project ID and client name, to any table.

**Fields beginning with only = are created using Report Datasets.**  
These fields hold data such as employee, vendor, rates, and amounts.  
You can add a field from the Reports Dataset window only to its corresponding table in the Layout tab.

**!Te in a field name indicates that it is a field from the Time and Expense part of the invoice.**  
Hover over a field to display more details about it.

**The color of fields in the Time & Expense table indicates the activity type:**  
Blue = labor  
Green = consultant  
Red = expense

**Actual text that prints on the invoice either ...**  
...appears in quote marks  
...or simply appears without quotes, equal signs, or any special characters.

**Field Examples:**

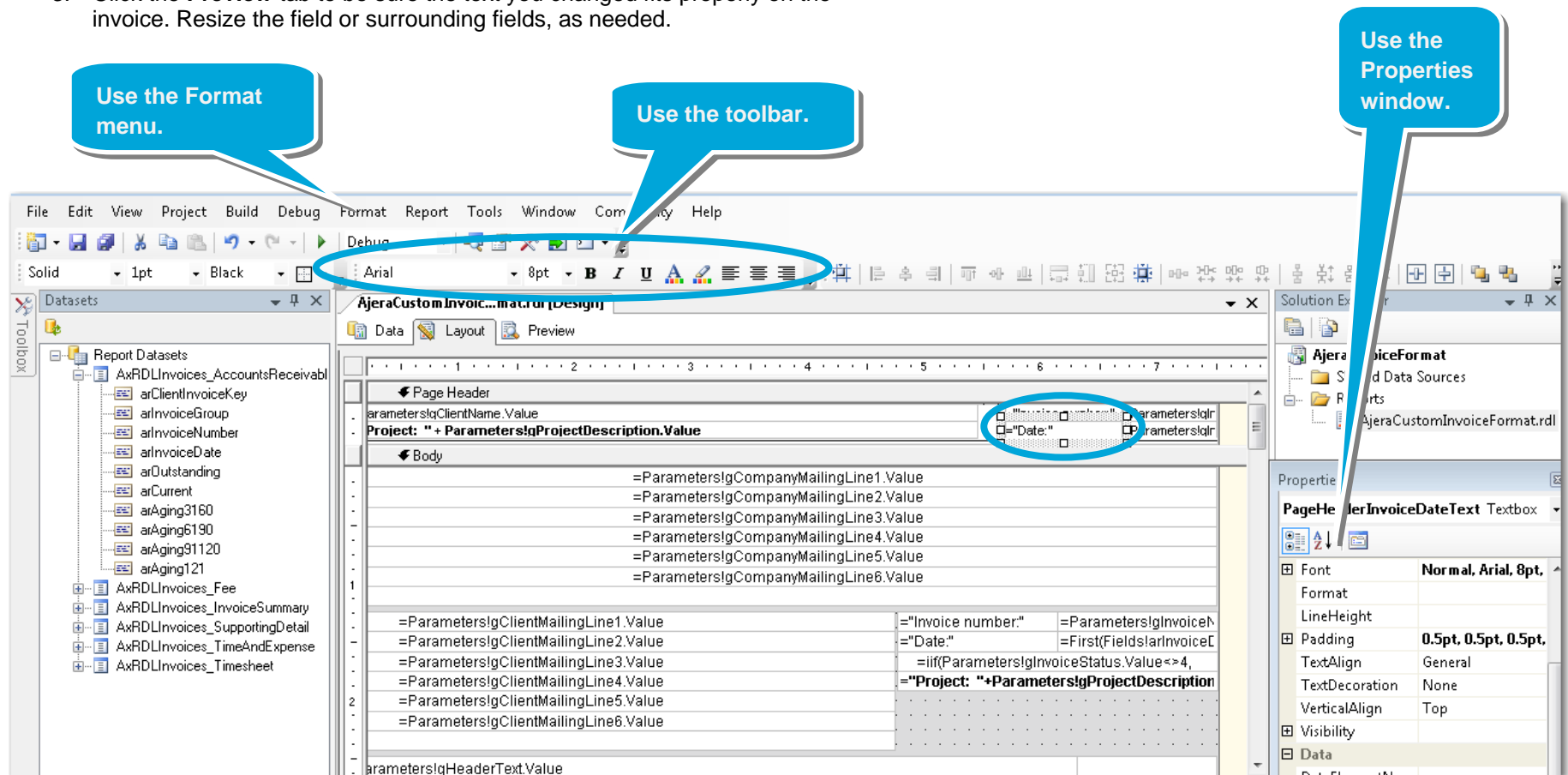
- =Parameters!gCompanyMailingLine2
- =Parameters!gCompanyMailingLine3
- =Parameters!gCompanyMailingLine4
- =Parameters!gCompanyMailingLine5.Value
- =Parameters!gCompanyMailingLine6.Value
- =Parameters!gClientMailingLine1.Value
- =Parameters!gClientMailingLine2.Value
- =Parameters!gClientMailingLine3.Value
- =Parameters!gClientMailingLine4.Value
- =Parameters!gClientMailingLine5.Value
- =Parameters!gClientMailingLine6.Value
- =Parameters!gHeaderText.Value
- =Parameters!gScopeOfWork.Value
- =Fields!teActivityTypeDescription.Value
- =First(Fields!teBillingActivityTypeText.Value)
- =Fields!teDetailGroup1Description.Value
- =Fields!teDetailGroup1Description.Value
- =Fields!teDetailGroup1Description.Value
- =Fields!teDetailGroup1Description.Value

**Printed Text Examples:**

- "Invoice number:"
- "Date:"
- =iif(Parameters!gProjectID, "Project: "+Parameters!gProjectID, "")
- Hours
- Units
- Units
- =code.NoZe =code.NoZe
- =code.NoZe =code.NoZe
- =code.NoZe =code.NoZe

## Changing a font

1. Click a field where you want to change the font.  
 To change more than one field, click a field and drag over the additional fields in the table. You can select only multiple fields within a table. To change the font for an entire invoice, repeat these instructions for each table in the Layout tab.
2. Change the font using the Format menu, toolbar, or Properties window.  
 Note: If you use the Properties window, you can only change more than one field at a time if the original settings for all the fields are the same.
3. Click the **Preview** tab to be sure the text you changed fits properly on the invoice. Resize the field or surrounding fields, as needed.



## Adding text on the invoice

Follow these instructions to add text to the invoice or change text that appears on it. For example, you may want to add a note to clients or a different heading.

1. Either click the field you want to change, or simply click an empty field where you want to add text.

You can also copy an existing field by clicking it and then copying and pasting it where you want it to appear on the invoice. Delete the text that is in it.

2. Type the text, or if you want to include text and data in the same field, do the following:

- Right-click, and click **Expression**.
- In the text box at the top of the Expression window, type the text you want, prefaced by an equal sign and enclosed in quotes. For example, type:  
`= "Project Manager:" + GProjectManagerName`

3. Click the **Preview** tab to see your changes.

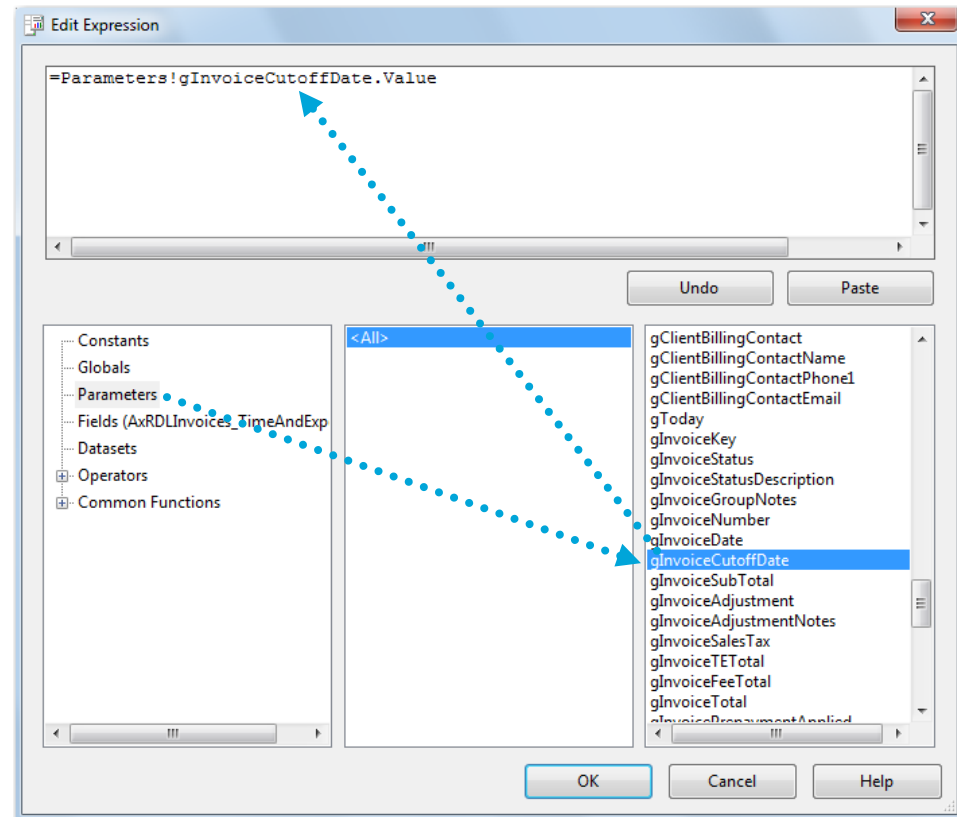
The image shows two screenshots of the Client Invoice Designer software. The top screenshot is the 'Design' view, showing a table with columns for 'Phase Summary', 'Contract', 'Labor', 'Expense', and 'Consultant'. A callout box points to a cell containing the text '=Fields!sdTransactionNote' with the label 'Text typed in the cell'. Another callout box points to a cell containing the text '=Fields!sdTransar Activity' with the label 'Text entered as an expression for the field'. The bottom screenshot is the 'Preview' view, showing the rendered invoice with fields for 'Invoice number' and 'Date'. A callout box points to the 'Invoice number' field with the label 'Text entered as an expression for the field'.

## Adding information using a parameter

Use this method to add a parameter field that contains information such as a client name, project ID, and so on.

To add detailed information, such as an employee, vendor, billed rate, or amounts, follow the instructions for *Adding information using a report dataset*.

1. Click an empty field where you want to add the new field.  
  
If there is no empty field in the area where you want to add the new field, follow the instructions for *Adding a row*.
2. Right-click the field, and select **Expression**. The Edit Expression window appears.
3. In the box on the left, double-click **Parameters**.
4. Find the field you want in the list at the right, and double-click it.
5. The field definition appears in the box at the top of the window.
6. Click **OK**.



# Adding information using a report dataset

This method works well if:

- You need to add detailed data to the invoice, such as the employee, vendor, billed rate, or amounts.
- You can readily find the field in the dataset and can match it to the correct table in the Layout tab.

Otherwise, follow the instructions for *Adding information using a parameter*.

1. Click an empty field where you want to add the new field.

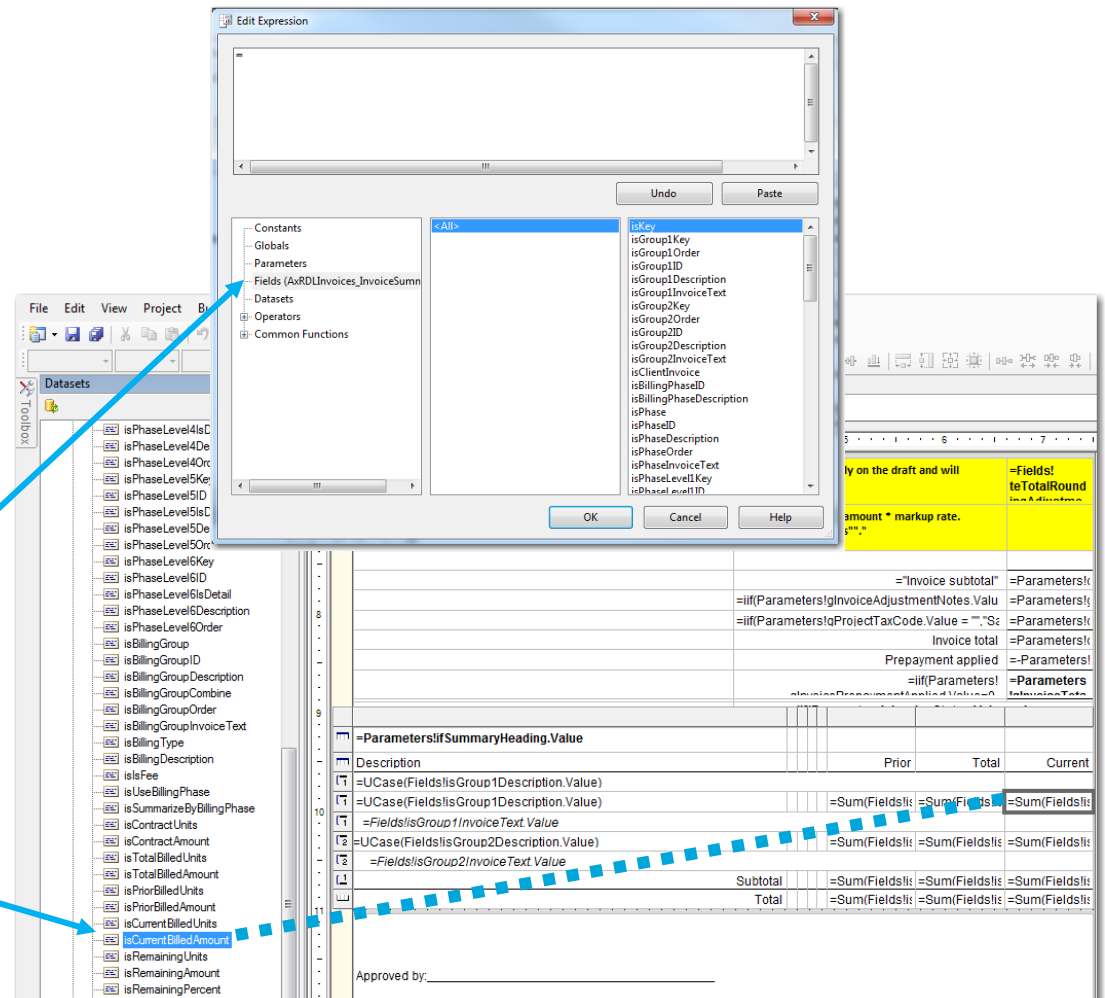
If there is no empty field in the area where you want to add the new field, follow the instructions for *Adding a row*.

**Important!** Report datasets contain fields from the Ajera database organized into folders that match different parts of the invoice.

Each table in the Layout tab can include fields from only one report dataset. To determine the dataset, right-click in the field, and select **Expressions**.

For example, you can add only fields from the AxRDLIInvoices\_InvoiceSummary folder to the Invoice Summary table in the Layout tab.

2. In the Report Datasets window, expand the folder that contains the field you want.
3. Click the field in the Report Datasets window and drag it to the highlighted field in the Layout tab.



## Adding a custom field

Follow these instructions to add a custom field to your invoice.

For more information about custom fields, from the Contents in Help, select Custom fields.

1. In Company > Custom fields, be sure that the **Available for custom invoice formats** check box is selected for the custom field you want to add to the invoice.
2. In the Client Invoice Designer, click an empty field where you want to add the custom field.
3. Right-click the field, and select **Expression**.
4. Click **Fields** in the box on the left.
5. Scroll through the list of fields at the right of the window until you find the custom field you want to add, and click it. Custom fields begin with **cf**.

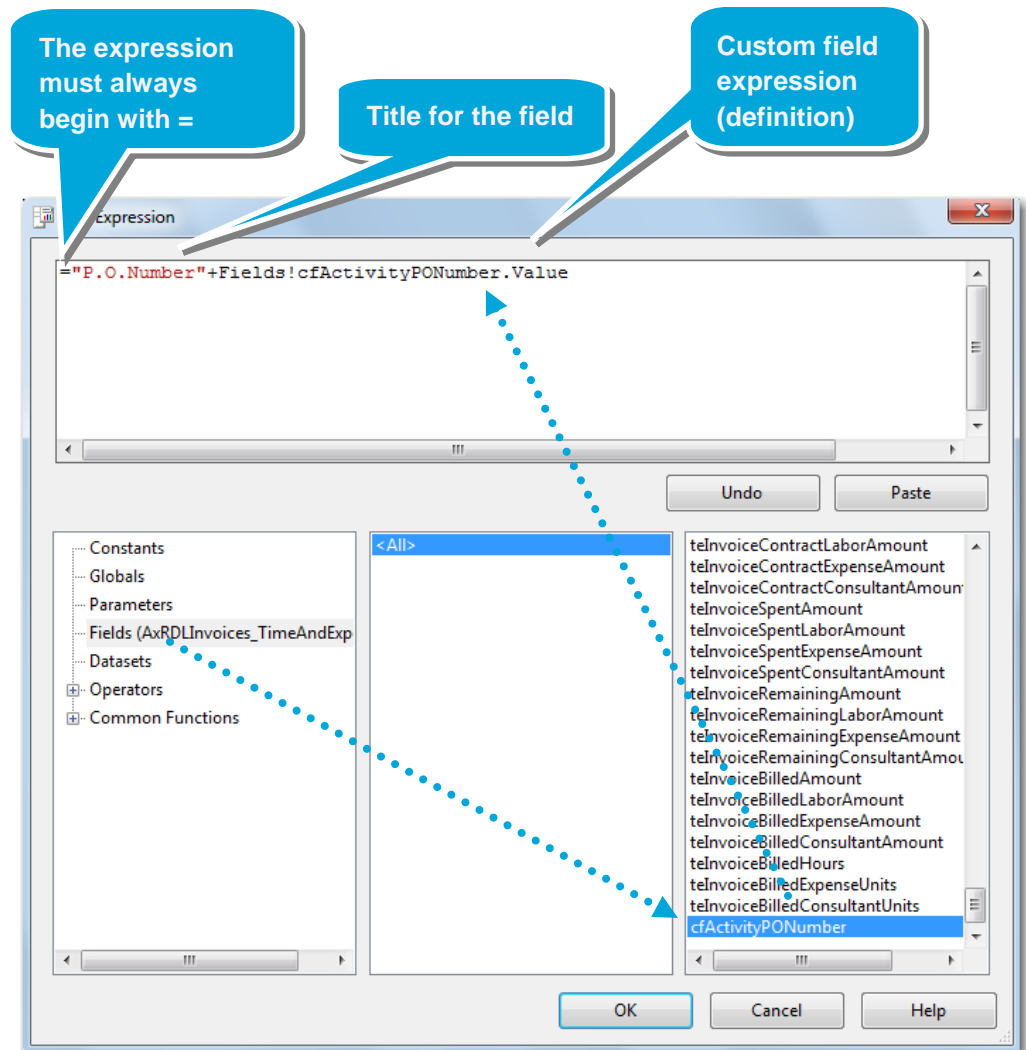
The expression for the field you selected appears in the area at the top of the window.

6. If you want to display a title for the field on the invoice, type it in area at the top of the window using the syntax in this example:

"P.O. Number"

To put the title after the field on the invoice, type the title after the field expression and put the + before it.

7. Click **OK**.





## Adding a row

Follow these instructions when you want to add a row. You can then add fields and text to that row, as needed.

1. Click a field in the row above or below where you want to add the new row.
2. Right-click the icon in the gutter, and select **Insert Row Above** or **Insert Row Below**.
3. Add fields and text to the row, following the instructions in this quick reference, as needed.

Icons appear in the left gutter when you click a cell in a table.

=Parameters!qHeaderText.Value							
=Fields!teActivityTypeDescription.Value							
=First(Fields!teBillingActivityTypeText.Value)							
				Hours	Rate	="Billed" + CH	
				Units	Rate	="Billed" + CH	
				Units	Rate	="Billed" + CH	
			1Description.Value				
			1Description.Value	=code.NoZe	=code.NoZe	=Fields!teBille	
			1Description.Value	=code.NoZe	=code.NoZe	=Fields!teBille	
			2Description.Value	=code.NoZe	=code.NoZe	=Fields!teBille	
				=Subtotal	=code.NoZe	=Sum(Fields!t	
				=Subtotal		=Sum(Fields!t	