Clients - Billing

In this tab users can view and update the client's billing address, invoice information, how they should be invoiced, and optionally invoice email information. If this client is a child of an existing client level, then the inherit checkboxes are available. Ticking the checkbox causes the field to be populated with its parent's value.

Permissions and Settings

To view clients, users must have the global permission to view clients.

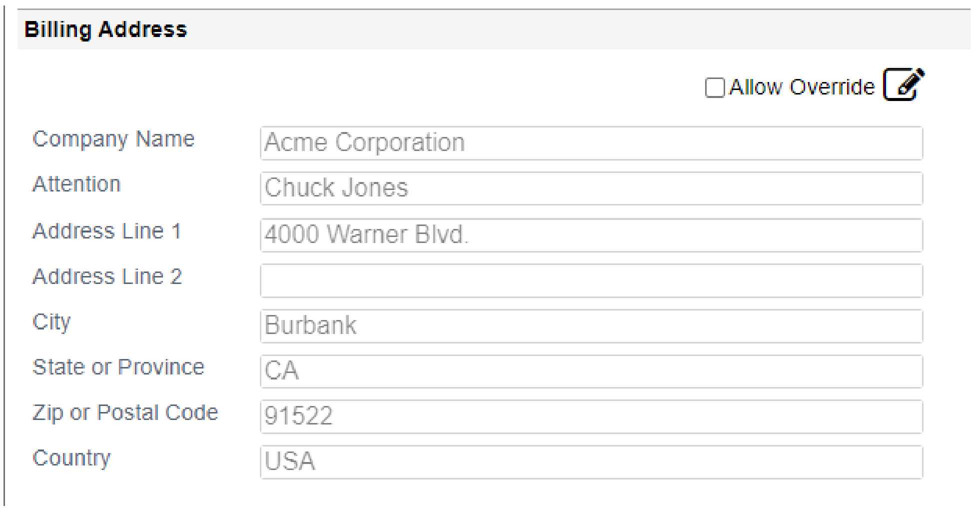
To update clients, users must have the global permission to update clients.

Billings

Specify information displayed on invoices and default invoice options.

Billing Address

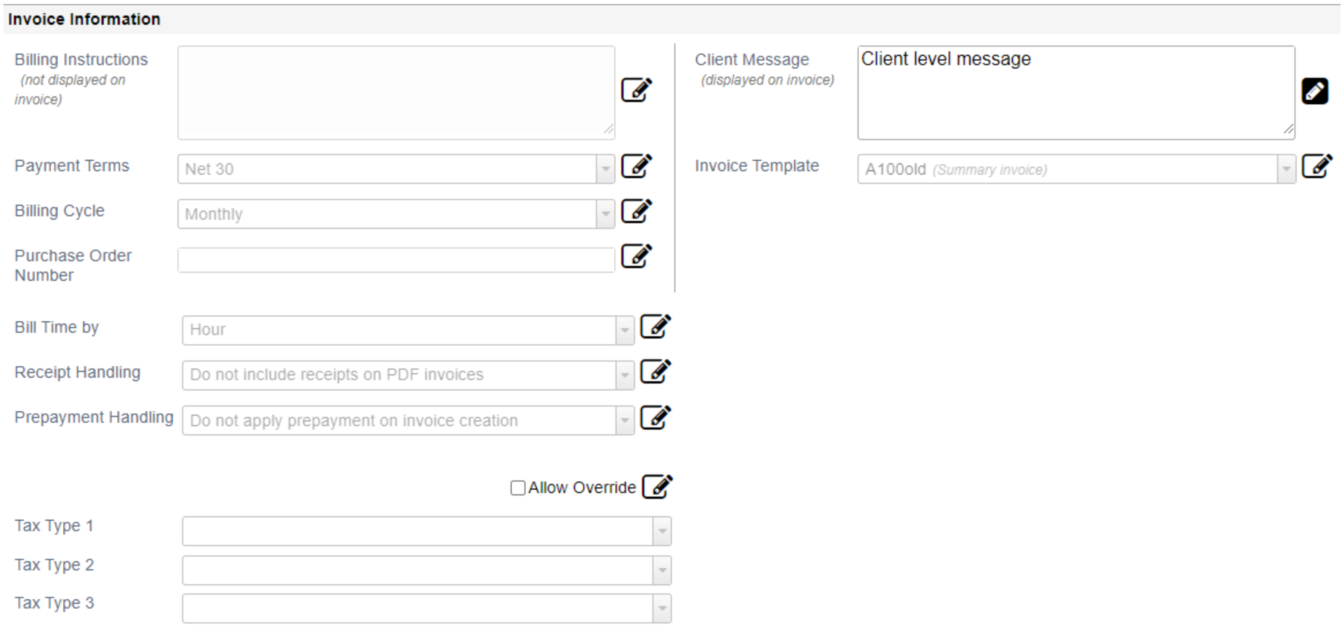
Displayed on invoices.



Field	Example
Company Name	Acme Corp
Attention	Accounts Receivable
Address Line 1	123 Main Street
Address Line 2	Suite 300
City	Boston
State or Province	MA
Zip or Postal Code	02138
Country	USA

Invoice Information

Default settings on new invoices.

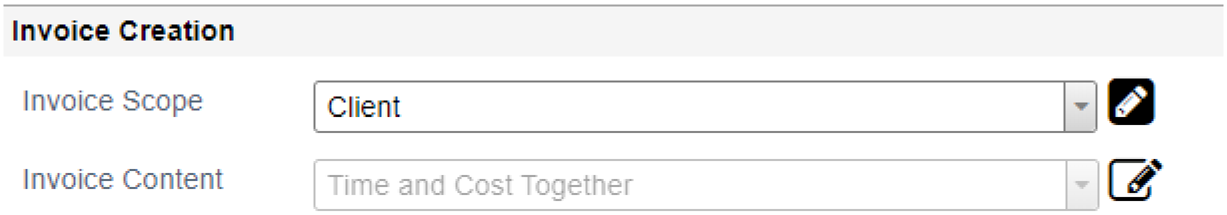


Field	Description
Billing Instructions	Specific billing instructions for this client. The person that prepares the client's invoice will see these instructions, but the client will not.
Payment Terms	Payment Terms define when payment of client invoices are due. They appear on printed invoices and in accounts receivables transactions sent to an accounting system. They dictate the time period in which an invoice must be paid and whether the organization is offering a monetary incentive for early payment. Choose from any of the options in this drop-down menu, or create additional options on the Payment Terms admin form.
Billing Cycle	When creating new invoices, you can find invoices that need to be created based on the billing cycle. • Current • Monthly • Semi-monthly • Weekly • Quarterly
Purchase Order Number	New invoices for this client will automatically populate with the specified PO Number
Bill Time By	Bill the client on either an hourly or daily basis. This option controls the availability of the Adjust for Daily Billing time card adjustment. It also affects the display of legacy templates to show days instead of hours in columns. This option does not apply when you have chosen one of our new templates. Because these new templates are editable, the expectation is that you will change the template to match your time display criteria.
Receipt Handling	Display receipts when this invoice is saved or mailed as PDF? • Include receipts on PDF invoices • Do not include receipts on PDF invoices
Prepayment Handling	If a prepayment balance exists, automatically apply as much of the balance as possible to the current invoice. • Apply prepayment on invoice creation • Do not apply prepayment on invoice creation
Tax Type	Automatically apply taxes to invoices for this client
Client Message	An optional message to be displayed on the client's invoice

Invoice Template	The layout that will be used for this client's invoices. For example, you can select a template that shows billed time broken down by who submitted it or by which project it was submitted to.

Invoice Creation

Billable items that are added to an invoice on creation.



Field	Description
Invoice Scope	When creating an invoice. Projector searches for all billable time cards and cost cards. It then groups them onto invoices based on your scope. For example, if you invoice at the project level and a client has two projects, we generate two invoices. • Client • Purchase Order Number • Engagement • Project **Special rules** When scoped at the Client or PO Number level, in order to have all engagements on the same invoice, each engagement's cost center, company, currency, and billing culture must match. **Milestones** Milestones are not mentioned in this dropdown, but they are affected by your choice. "Together" really means Time + Cost + Milestones all on the same invoice if possible. When would it *not* be possible? Milestones optionally have a project. If you are invoicing time and cost at the project level, but the milestone doesn't have a project, we can't stick them together. Rather, a separate invoice will be created for just the milestone. The invoice will be at the engagement level. If you choose the "separately" option then separate invoices are created for time, cost and milestones. **Purchase Orders** Purchase Orders behave in a special way.
Invoice Content	If you have both time and cost cards to invoice - do you want them all together on one invoice or separated over two invoices? Some clients pay labor invoices more quickly than expense invoices or vice-versa. Billing for time/expenses separately may help your organization get paid faster. • Time and Cost Together • Time and Cost Separately