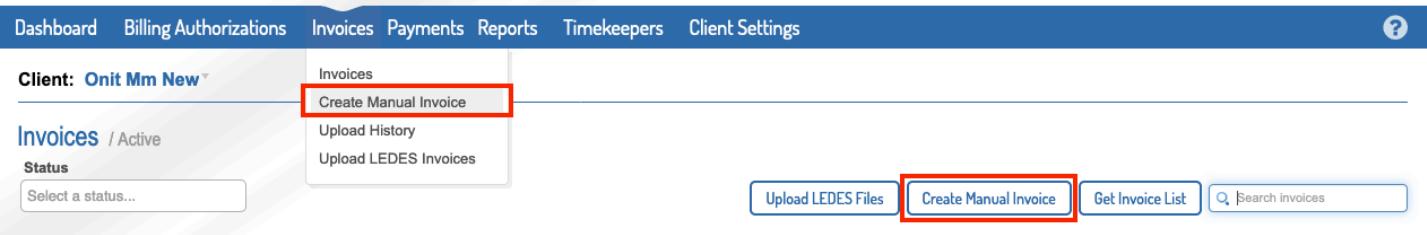


Building an Invoice

1. Select your client from the Client dropdown menu.



2. Choose Create Manual Invoice from the Invoices tab on the top blue bar. Or choose the Create Manual Invoice button at the top of your Invoices list.



3. Complete the required fields for the invoice header.

A screenshot of the 'New Invoice' form. The form is titled 'New Invoice' and has a 'Switch Client' button. Below the button, it says 'Currently selected: Onit Mm New'. The form has several required fields marked with a red asterisk: 'Office *' (dropdown menu with 'New York' selected), 'Project *' (dropdown menu with 'Select a project...' selected), 'Date *' (two date pickers: 'Invoice Date' with '2019-04-04' and 'Due Date' with '2019-04-18'), 'Invoice # *' (text input field), 'Currency *' (dropdown menu with 'Select Project to Populate Invoice Currency' selected), and 'Period *' (two date pickers: 'Start Date' with '2019-03-01' and 'End Date' with '2019-03-31'). There is also a checkbox for 'Is this invoice subject to VAT processing rules (e.g. Does the invoice contain VAT for the EU)'. The form is styled with a light blue and white color scheme.

4. Add any fee line items. You can add as many line items as needed using the Add Fee button.

Fees

	Date	Timekeeper	Activity Code	Task Code	Description	Cost	Quantity	Line Total
x ⇅	<input type="text"/>	Select a... ▼	Select an ... ▼	Select a... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
x ⇅	<input type="text"/>	Select a... ▼	Select an ... ▼	Select a... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
x ⇅	<input type="text"/>	Select a... ▼	Select an ... ▼	Select a... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00

Add Fee

5. Add any expense line items. You can add as many line items as needed using the Add Expense button.

Expenses

	Date	Expense Code	Description	Unit Cost	Quantity	Line Total
x ⇅	<input type="text"/>	Select an ... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
x ⇅	<input type="text"/>	Select an ... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
x ⇅	<input type="text"/>	Select an ... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00

Add Expense

6. Add any discount and tax line items. You can add as many line items as needed using the Add Discount and Add Tax buttons.

Note: Discounts should be entered as negative numbers.

Discounts

Date	Discount Code	Discount Type	Description	Discount Amount
x <input type="text"/>	Select a dis... ▼	Select adju... ▼	<input type="text"/>	<input type="text"/>
x <input type="text"/>	Select a dis... ▼	Select adju... ▼	<input type="text"/>	<input type="text"/>
x <input type="text"/>	Select a dis... ▼	Select adju... ▼	<input type="text"/>	<input type="text"/>

Add Discount

Taxes

Date	Tax Code	Description	Tax Rate	Tax Amount
x <input type="text"/>	Select a tax... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
x <input type="text"/>	Select a tax... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
x <input type="text"/>	Select a tax... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Tax

7. Add attachments needed by choosing Browse. You can add as many attachments as needed using the Add Attachment button.

Net Total

0.00

Notes

Attach Files

x

Browse

Add Attachment

Optional description...

8. Send your invoice or Save as Draft.

Attach Files

×

Browse

Optional description...

Add Attachment

Send

Save As Draft

Cancel

9. When sending the invoice, ensure a status of **Pending Approval** to confirm successful submission to your client. If the invoice fails, it was not submitted and you will need to correct the errors listed and then reattempt submission.

Invoice: 32532

Email PDF | Print | Payment History | Audit History

PENDING
APPROVAL

INVOICE

Invoice: 324322

Send to Client | Email PDF | Print | Payment History | Audit History

FAILED

INVOICE

Edit Invoice

Void Invoice

VAT INVOICE