

FAQ - How do I display the contributor project on the invoice?

Question

How do I display the contributor project on the invoice?

Solution

In **Admin > Setup > Accounting > Invoice Formats**, choose to group by project and then select Show Project Code in the Project/Task Display Controls section.

This may be useful if you have multiple contracts/projects within one customer, and want to invoice all of those projects for that one customer on one invoice. You would create a shell or umbrella project as the Lead project, with the other projects as Contributor projects. This shell or umbrella project as the Lead project will have no charges to it, but will be used to group the contributor projects. You may choose to name the Lead project (the shell/umbrella project) with the customer name in the Project Code.

Navigate: Admin > Setup > Accounting > Invoice Formats > Edit Pencil Icon.

Admin Setup – Edit Invoice Format - A Standard Detail Invoice

Summary | T&M Labor | T&M Expense | Fixed Price | Cost Plus | Funded Value Adj | Additional Items | Pre-Billed Labor | Pre-Billed Labor Offset | Tax

Active

Name: A Standard Detail Invoice

Description: Standard format showing all line item details.

Orientation: Portrait

DISPLAY CONTROLS

- Show Charge Breakdown
- Show Tax Separately
- Show Remit To As Single Line
- Show Inception To Date Amount
- Show Invoiced To Date Amount
- Show Outstanding AR balance

PROJECT/TASK DISPLAY CONTROLS

- Show Project Organization Code
- Show Project Code
- Show Project Title
- Show Task Number
- Show Task Name

Note: These controls affect the display of projects and tasks in the body of the invoice only.

GROUP BY PROJECT

- Show Project Funded Value
- Show Remaining Project Funded Value
- Show Order Number

GROUP BY TASK

- Show Task Funded Value
- Show Remaining Task Funded Value

Show Task Header For: Every Task

SECTION ORDER

- T&M Labor Section - T&M Labor
- T&M Expense Section - T&M Expense
- Funded Value Adj Section - Funded Value Adjustment
- Fixed Price Section - Fixed Price
- Pre-Billed Labor Section - Pre-Billed Labor
- Cost Plus Section - Cost Plus
- Pre-Billed Labor Offset Section - Pre-Billed Labor Offset
- Additional Items Section - Additional Items

Note: Tax section, if enabled, will always be shown last.

Invoice Preview:

Invoice Logo

Invoice Number: #####
 Invoice Date: 12/30/2029
 Payment Terms: Terms
 Discount Amount: \$0.000.00
 Billing Through: 12/30/2029
 Due Date: 12/30/2029
 Discount Date: 12/30/2029

Bill To:
 Attn: Bill To Contact
 Bill To Organization
 Street Address
 City ST 00000

Project Code: Optional Item
 Project Title: Optional Item
 Contract Number: Optional Item
 Order Number: Optional Item
 Funded Value: \$0.000.000.00

Ship To:
 Attn: Ship To Contact
 Ship To Organization
 Street Address
 City ST 00000

INVOICE

Description	Amount
Invoice description can optionally be included on an invoice and will appear here on the invoice.	
T&M Labor	
Task 1 Name Labor Category Lastname, Firstname	2.00 \$10.00 \$ 20.00
Total for Labor Category Labor Category:	2.00
Task 2 Name Labor Category Lastname, Firstname	2.00 \$10.00 \$ 20.00
Total for Labor Category Labor Category:	2.00
Total for T&M Labor:	\$ 40.00
T&M Expense	
Task 1 Name Expense Type Lastname, Firstname M.	\$ 20.00
Task 2 Name Expense Type Lastname, Firstname M.	\$ 20.00
Total for T&M Expense:	\$ 40.00
Funded Value Adjustment	
Total for Funded Value Adjustment:	\$ 80.00
Fixed Price	
Task 1 Name Fixed-Price Item Description	\$ 20.00
Task 2 Name Fixed-Price Item Description	\$ 20.00
Total for Fixed Price:	\$ 40.00
Pre-Billed Labor	
Pre-billed Labor Item Description	\$ 20.00
Total for Pre-Billed Labor:	\$ 20.00
Cost Plus	
Cost Element Lastname, Firstname M.	\$ 80.00
Total for Cost Plus:	\$ 80.00
Pre-Billed Labor Offset	
Labor Offset from Pre-Bill	\$ (20.00)
Balance from Pre-Bill items \$20.00	\$ --
Total for Pre-Billed Labor Offset:	\$ (20.00)

Additional Information

[Help Docs - Invoice Formats](#)