

User guide for clients: New invoicing features

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As you will have seen in our launch email, we have released new invoicing functionality in the Intouch portal.

You can now:

- Create invoices within the portal
- Add as many lines of description as you wish
- Choose to display your own company logo and bank payment details
- Display payment terms on your invoice
- Add your contract details so all invoices can be attached to the relevant contract
- Download a PDF of your invoice to send to your client or agency

Of course, you can continue to create simple invoices in the usual way if that meets your needs. If you do choose to create and customise invoices using the new functionality, your preferences will be saved for next time so you only have to personalise your settings once.

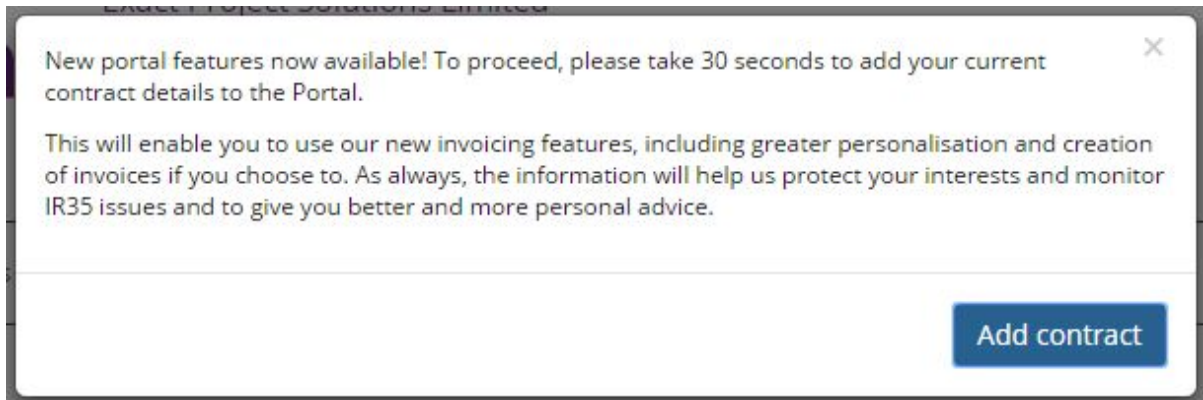
To enable the new features, we will be asking you to input your current contract details next time you add a new invoice in the portal. You will see a one-off pop-up asking you to complete a short form about your contract.

These changes make your record keeping easy and efficient, and give us greater visibility of your circumstances in order to better advise you and tailor the portal to meet your needs. Any information you input will remain strictly confidential, as you would expect from us.

We have developed these features to be straightforward to use but to understand the changes more fully we recommend reading the guidance below. If you still have any questions after reading, please contact your Personal Accountant.

1. Adding your contract to the portal

1. Next time you go to add an invoice on the portal (via 'Transactions' then 'Invoices' from the homepage menu) you will see a one-off pop-up asking you to add your contract details.



2. Click 'Add contract' to proceed.
3. On the 'Add Contract' screen please fill in all of the fields. You will find help icons next to the fields that you can hover over for more information. This information is included below for your reference.
4. Click 'Save contract details' at the foot of the page to save the information.

Help text for the 'add contract' form

Extension or new contract?

Is this a new contract (with a new or existing client) or an extension of an existing contract?

IR35 status

Do you consider this contract to fall inside or outside of IR35?

Private or public sector?

Is your end client in the private or public sector?

Is your client UK based?'

If your client is outside the UK you do not normally need to charge VAT. If you supply services outside the UK and within the European Economic Area you should complete an EC Sales submission to HMRC.

Currency

The currency that your invoices will be issued in.

(You will only see the Currency option if your end client is outside of the UK. You will have a choice between Sterling, Euro and Dollars.)

Billing unit type

The units in which your time will be billed for.


Payment terms (days)

Enter zero if you do not wish to include payment terms on invoices for this contract.

2. Add new invoice

Once you have added your contract, invoices for that contract can then be added in the normal way. The main addition is that you will need to select the contract that the invoice applies to, with the option to add a new contract if needed. Matching each invoice up with the relevant contract makes your record keeping really simple and effective, so this is an important new feature.

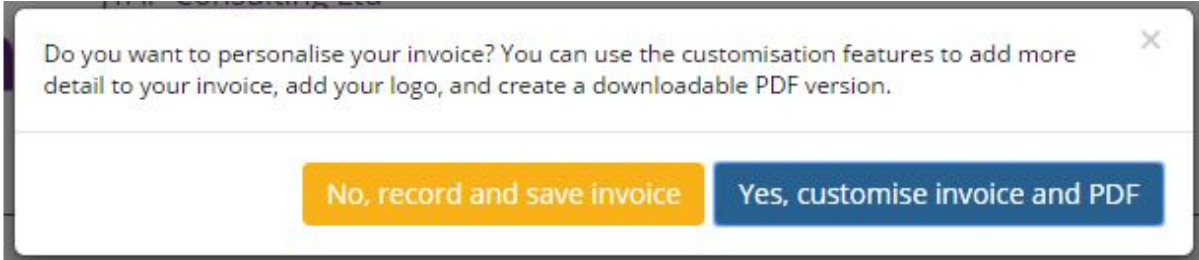
Add an Invoice



The screenshot shows a form titled "Add an Invoice". It contains the following fields and elements:

- Invoice Date:** A text input field containing "01/10/16". To its right, there is a note: "on this date the company was registered for VAT at 20%".
- Contract Ref:** A dropdown menu showing "Example Contract". To its right is a purple button with a plus icon and the text "New Contract".
- Type:** A dropdown menu showing "Professional Services".

After adding your invoice, you will be given the option to use the new invoicing features:



The screenshot shows a dialog box with the following content:

Do you want to personalise your invoice? You can use the customisation features to add more detail to your invoice, add your logo, and create a downloadable PDF version.

At the bottom of the dialog box, there are two buttons:

- A yellow button: "No, record and save invoice"
- A blue button: "Yes, customise invoice and PDF"

Option 1: Click 'No, record and save invoice' to finish at this point.

Option 2: Click 'Yes, customise invoice and PDF' to use the new functionality, and you will be redirected to the new PDF invoice page.

3. Create and customise invoice

Use this page to create and customise your invoice - ideal if you want to add more detail before sending a PDF to your client or agency. At any point while you're editing your invoice on this page, your information will be saved automatically if you navigate away from the page.

3.1 Adding additional lines of description

You can add further descriptive lines to an invoice. There are 5 different types available - Professional Services, VAT only, Expenses Reimbursed, Sale of asset and Disbursement.

Adding extra lines is a useful feature if you wish to display your billable time and other items such as expenses on separate lines. To display expenses separately, you must change the Net amount for Professional Services and then add a new line for the expenses. To recalculate the charge for Professional Services please edit the line and add or amend the time and rate information.

There is a simple form to complete with details of each additional invoice line. Any changes will automatically update the overall value of the invoice, and there is no limit to the amount of lines that can be added to one invoice.

- **To add another line** use the *'Add another line'* button.
- **To edit or delete a line** use the options to the right of each individual line.

Example of invoice lines:

Date	Type	Description	Days	Rate	Net	VAT	Total	
01/11/2016	Professional Services	Example Invoice			2000.00	400.00	2400.00	edit delete
Total					2000.00	400.00	2400.00	

Showing 1 to 1 of 1 entries

Add another line

Form to add or amend a line:

Add New Line or Amend ✕

Type:

Description:

Days:

Rate:

Net:

VAT:

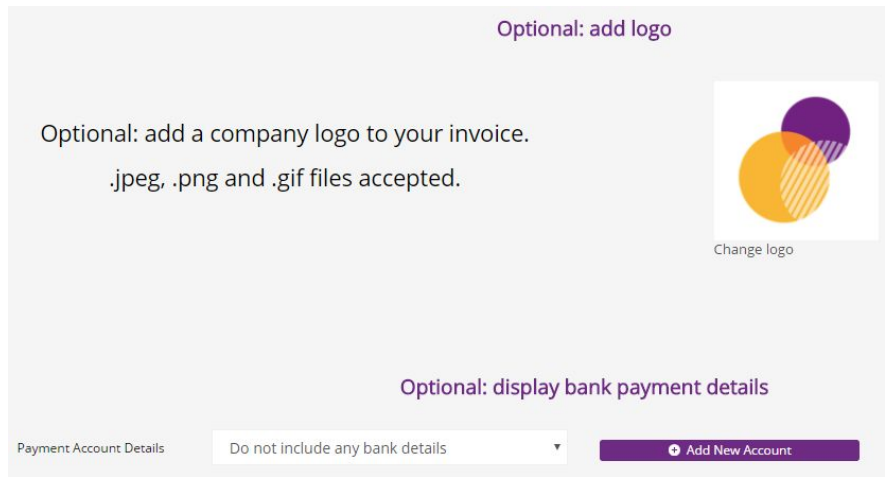
Total:

To display expenses separately, you must change the Net amount for Professional Services and then add a new line for the expenses. Please add or amend the time and rate information on this screen to recalculate the charge for Professional Services.

3.2 Extra customisation

There are then two ways to customise the invoice PDF. Your company logo can be added and your bank payment details can be displayed.

Logo and bank payment detail options:

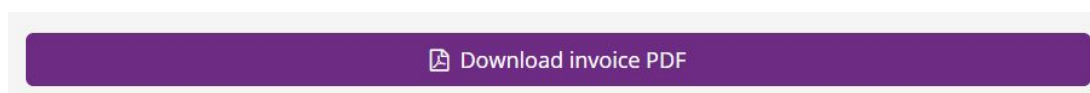


Only one company logo can be added. If you upload a second one it will replace the original. The company logo will be stored and available to use on all future invoices. The choice of bank details is remembered and will default to what was used for the last invoice.

Don't forget that if you add your payment terms to your contract, any invoices you create for that contract will display those terms.

4. PDF production

Once you're happy with your invoice you can create a PDF version to send to your client or agency. Just click the 'Download Invoice PDF' button and the PDF will download to your computer. You can now exit the page.



5. Invoices section of the portal

The portal invoice section remains largely unchanged. For invoices that you haven't customised, you will see an option to create a PDF.

For invoices that you have already customised, you will see an option to edit the invoice or re-download the PDF:

Γ	↑↓	Total	↑↓	Actions	↑↓
00.00		10800.00		PDF edit delete	
00.00		5400.00		create PDF edit delete	