

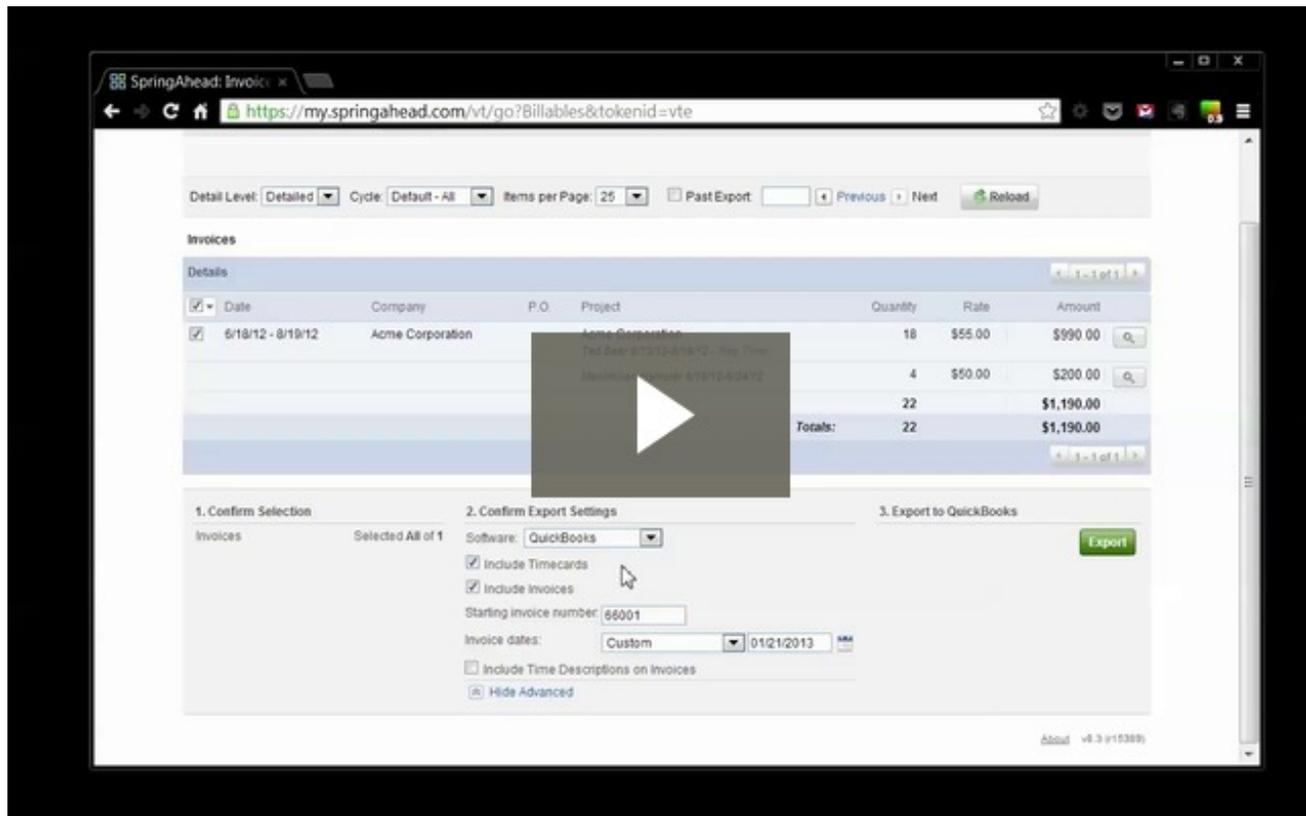
Configuring Invoice Export

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With SpringAhead, you have the option to bring invoices directly into your accounting software, with or without timecard information. Using this guide you will:

- Become familiar with the different settings
- Configure your invoice export



Reviewing The Options

1. Log in as an administrator
2. Click on **Settings**, then click on **My Company**
3. Scroll down to the **Invoicing** section

Invoicing

No Invoicing

Export Timecards with Invoices

Export Invoices Include Time Descriptions on Invoices

Accounting Software

Invoice Cycle Invoice Date

Invoice Description

 Use Item Description on Invoices

4. Here is an overview of what the above settings mean:

- No Invoicing
 - Checking box makes all time non-billable
- Export Timecards with Invoices
 - Check this box if you are exporting timecards to a 3rd party payroll provider, but still would like to have the timecards in your accounting software
- Export Invoices
 - Tells SpringAhead to bring invoices into your accounting system
- Include Time Descriptions on Invoices
 - Tells SpringAhead to send notes from the timecard to the description field on the invoice
- Account Software
 - This is the accounting system that you use for invoicing
- Invoice Cycle
 - The invoice cycle is the most common frequency in which you invoice your clients. This can be changed on a project by project basis
- Invoice Date
 - This is the date that appears on your invoice
 - If set to today, the date will be the day you export
 - If set to custom, SpringAhead will ask you for a date each time you export
- Invoice Description
 - SpringAhead has a lot of control over what populates in the invoice description
 - For a detailed list of description options, click on this link to our guide
 - [Customizing Invoice Descriptions](#)
 - The default invoice description is %Name% - %Dates%
- Use Item Description on Invoices
 - Checking this box overrides the default invoice description above and uses the item descriptions in your accounting system

Reviewing A Sample Setup

This is an example of the most common setup for bringing invoices into QuickBooks.

Invoicing

No Invoicing

Export Timecards with Invoices

Export Invoices Include Time Descriptions on Invoices

Accounting Software

QuickBooks

Invoice Cycle

Invoice Date

Monthly

Period End Date

Invoice Description

Use Item Description on Invoices

[▶ More Settings](#)