



Support Centre Prime Ecosystem

Updated 14.11.22

Prime Support Centre - Forms

Prime Instructions | Adding an accounts receivable invoice to a form

After creating an Accounts Receivable Invoice, you can add these to a Form:

1. Go to your form and click 'Add Tags/Content'

DC185 8 Clarke, Prahran, VIC, 3181 (Inner Melbourne) GGG Insure | GGG56765 Pending Information

Save & Preview PDF Generate

Job Summary

- Customer: Oliver Doma
- Preferred Number: 12341234
- Email: No Email
- Site: 8 Clarke, Prahran, VIC, 3181
- Client: GGG Insure
- Assigned: Rhys Domagala
- Case Manager: N/A
- Supervisor: Paul Brandis

General

- Overview
- Details
- Reminders: 29
- Appointments: 1
- Forms

Template *

Sales Invoice

Content

Paragraph Add Tags/Content Add Images More

B Add Tags/Content A

Dated: [today]

Tax Invoice

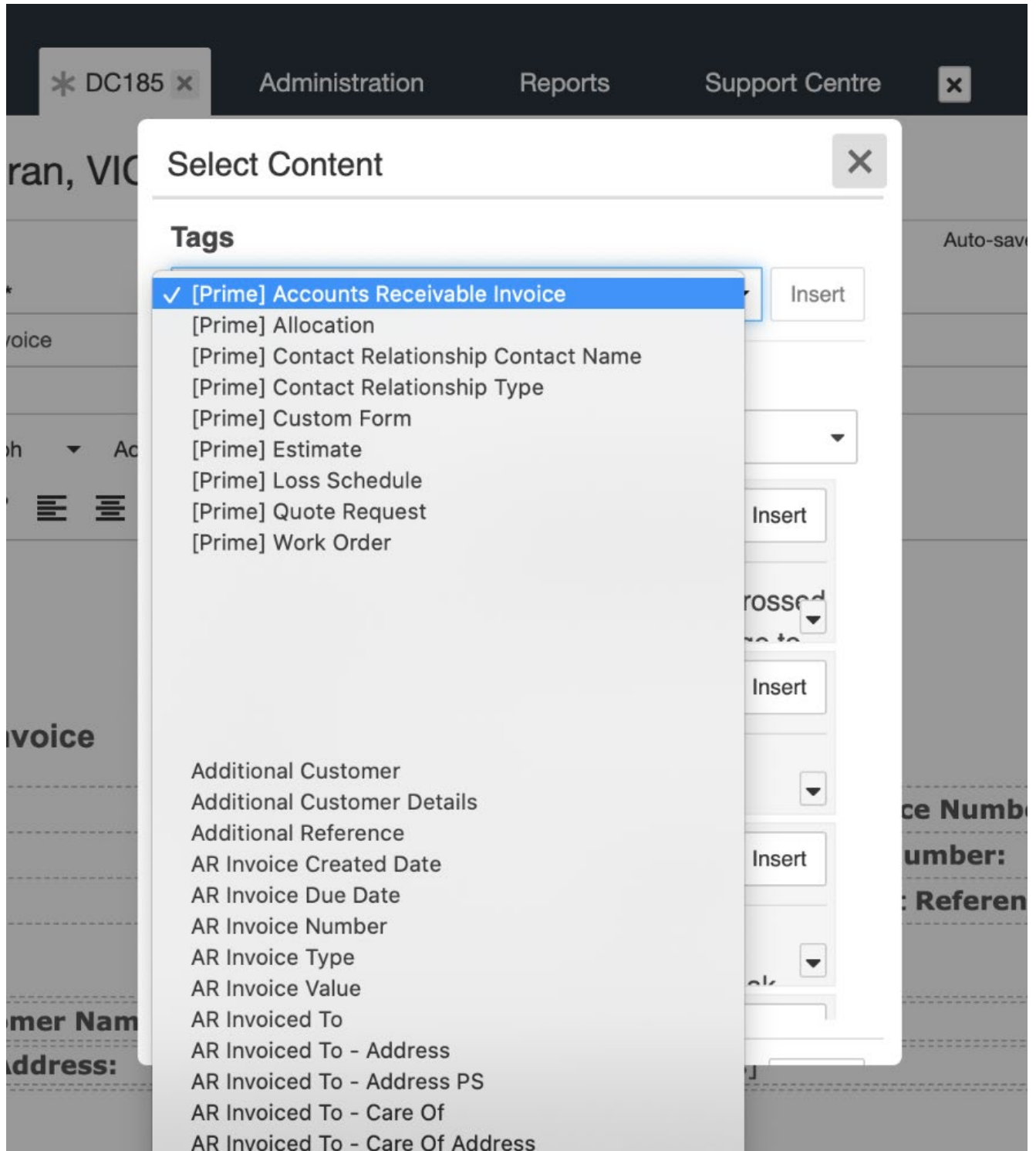
To:	[ar-invoiced-to-name]	Invoice Number:	[ar-invoice-number]
ABN:	[ar-invoiced-to-address]	Job Number:	[job-job-number]
	[ar-invoiced-to-abn]	Client Reference:	[job-client-reference]

Customer Name: [job-customer-name]

Site Address: [job-site-address] [job-site-address-ps]

All invoices required to be paid within 14 days.

2. Select 'Accounts Receivable Invoice'



3. You can then select the invoice in the tag options. If the invoice is an Authorised Works and contains an Estimate, you have additional options to customise your invoice items

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Tag Options

Accounts Receivable Invoice Options

Accounts Receivable Invoice *
DC00120

Customise Linked Authorised Items

Template *
Sales Invoice

Content

Paragraph Add Tags/Content Add Images More

Tax Invoice


To: [ar-invoiced-to-name] Invoice Number: [ar-invoice-number]
 [ar-invoiced-to-address] Job Number: [job-job-number]
 ABN: [ar-invoiced-to-abn] Client Reference: [job-client-reference]

Customer Name: [job-customer-name]
 Site Address: [job-site-address] [job-site-address-ps]

[accountsReceivableInvoice]

All invoices required to be paid within 14 days.

4. When you Preview, you will now see the Accounts Receivable Invoice in the PDF



Prime Ecosystem
 1800 DEVCON
 support@primeecosystem.com.au
 PO Box 123
 Brisbane 4001

Dated: 05/03/2020

Tax Invoice

To: Oliver Doma
 1 Commercial Road

Invoice Number: DC00120
 Job Number: DC185
 Client Reference: GGG56765

ABN:

Customer Name: Oliver Doma
 Site Address: 8 Clarke, Prahran VIC 3181

Description	Rate	Unit	Quantity	Total
DC00120				
Tag Test	33.15	Ea	1.0000	33.15
Negative Variation	(10.00)	Ea	1.0000	(10.00)
Totals				

5. Additionally, in the Administration Finance Settings, you can also select a default template for when you click 'Create PDF' on the AR Invoice screen

Administration

- Users
- Contacts**
 - Contact Relationship Types
- Finance**
 - Account Numbers
 - Expense Templates
 - Expense Types
 - Finance Integration
 - Finance Settings**
- Forms**
 - Custom Form Numbers
 - Custom Form Templates
 - External Form Templates
 - Forms

Digits *
5

Number *
261

Padding

Cancel Save

Finance Settings

Default AR Form Template
Sales Invoice

Sales Payment Term Type
Sales Payment Term Type...

Sales Payment Term Value
Sales Payment Term Value...

Purchases Payment Term Type
Purchases Payment Term Type...

Purchases Payment Term Value
Purchases Payment Term Value...

Cancel Save