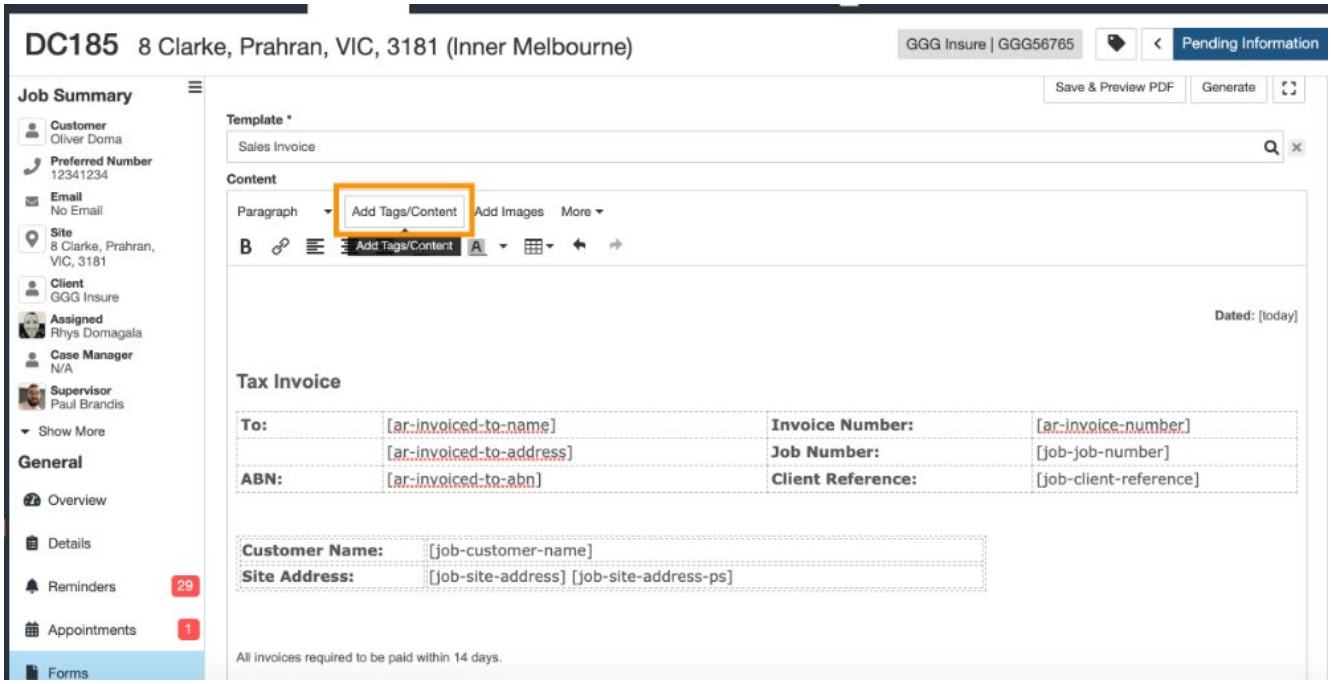
Support Centre
Prime Ecosystem

Updated 14.11.22 **Prime Support Centre - Forms**

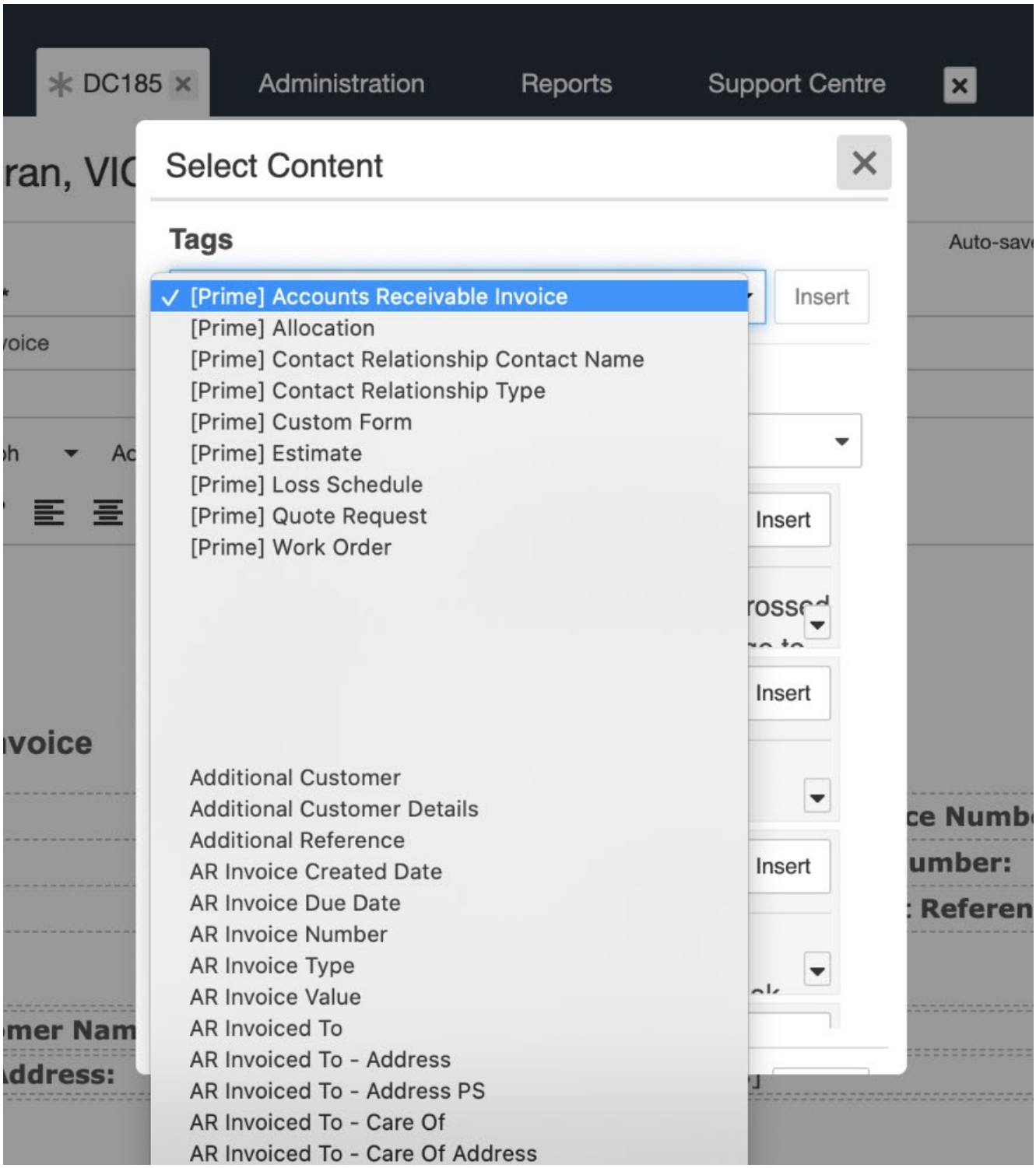
Prime Instructions | Adding an accounts receivable invoice to a form

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

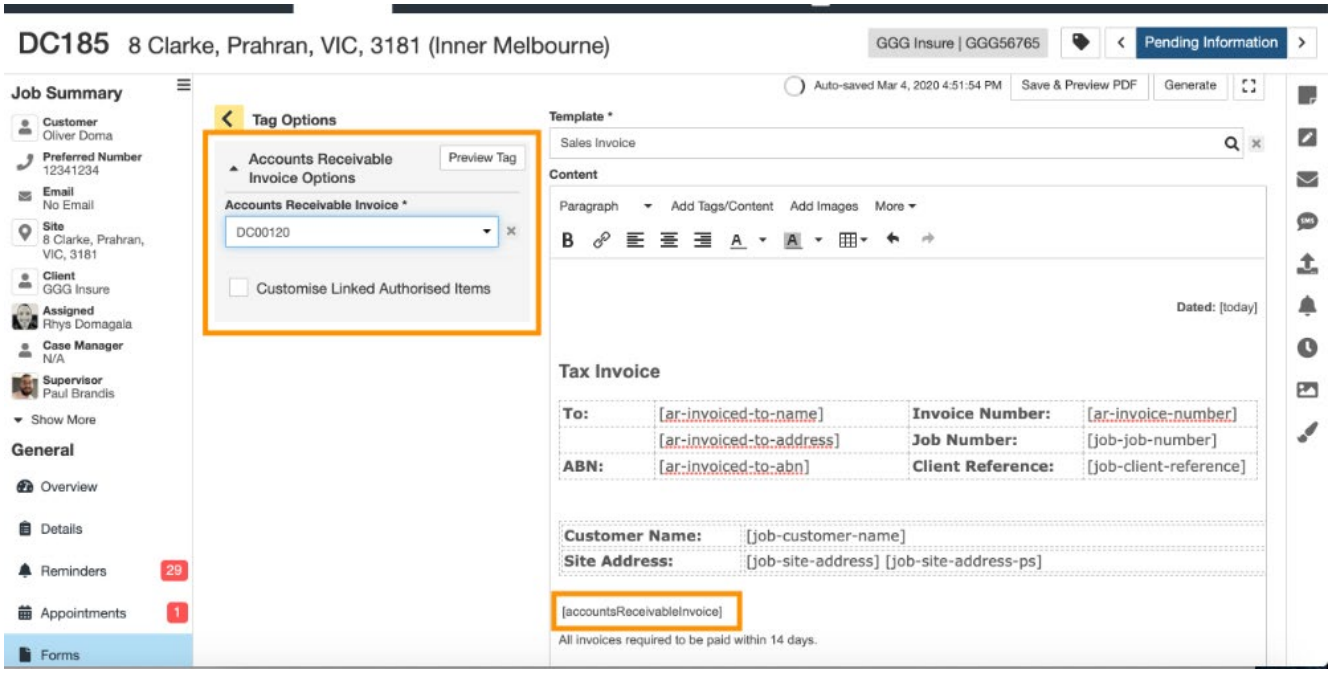
1. Go to your form and click 'Add Tags/Content'



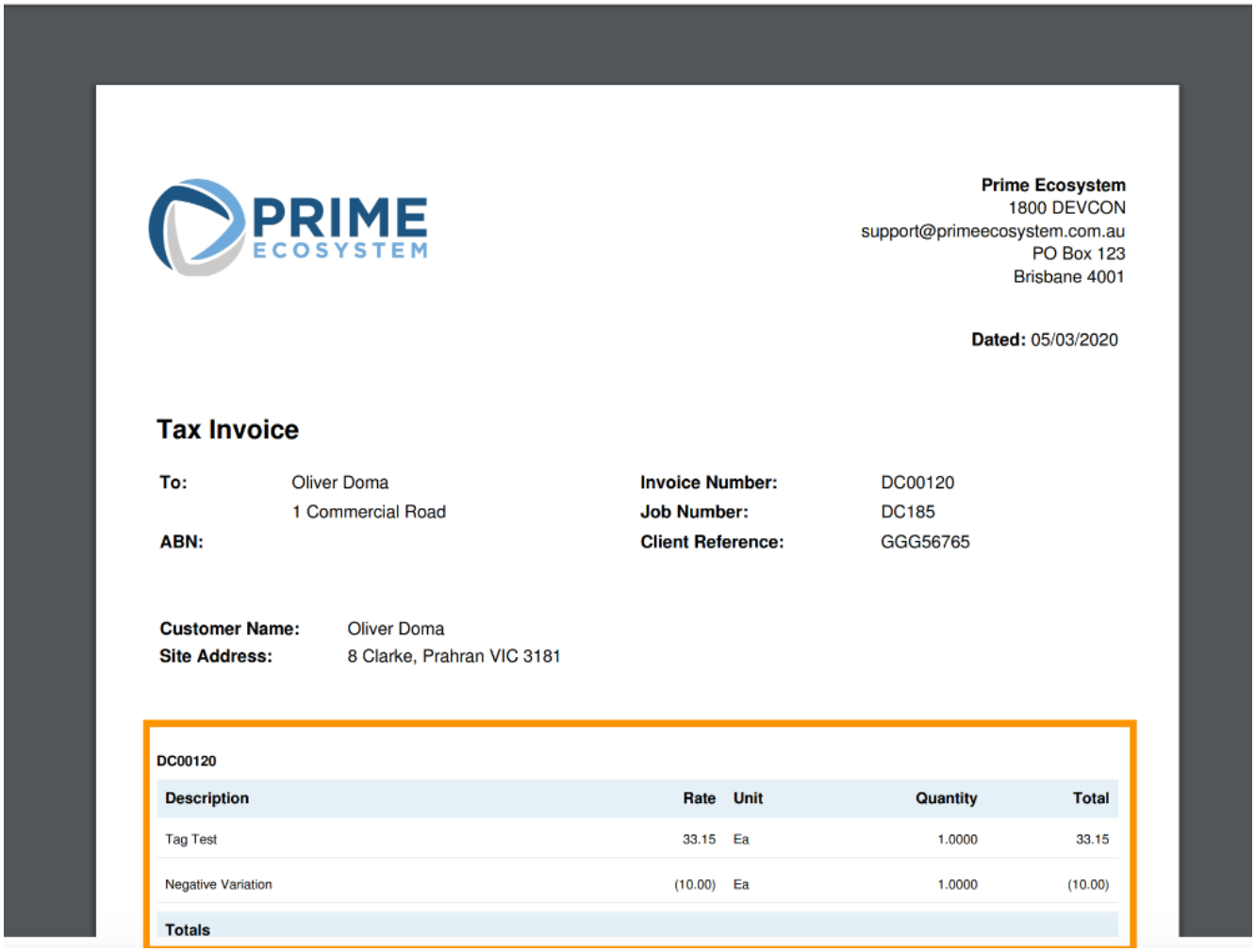
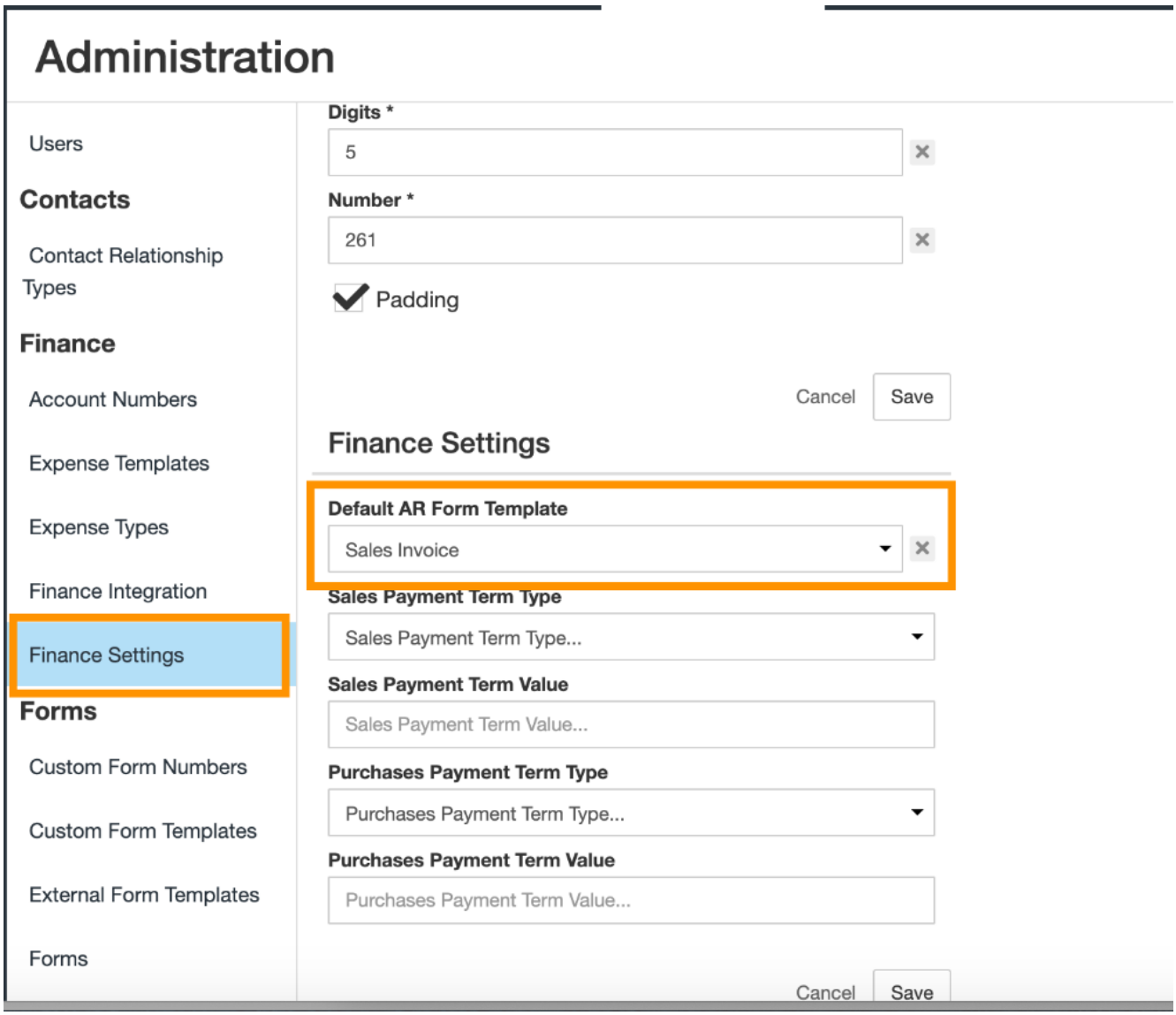
2. Select 'Accounts Receivable Invoice'



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



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



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