OnePractice Template Customisation Manual

This manual is designed to help you and your team utilise invoice and reporting statement templates in OnePractice

Setting up

Invoices and Reporting Statements within OnePractice are created using a base template that can be customised with your firm's font, firm contact details, logo and text.

These are not available unless a template has been set up and customised and can only be used if your firm is using the invoice generation method "Invoice and Reporting Statement Templating", which can be found under the Administration ribbon – Practice Settings – Invoice Settings.

To get you started we have created:

+ A reporting statement base template that you can access here
+ An invoice base template that you can access here

NOTE: **Do not** delete data fields that are pulling information into the template from OnePractice. You can only edit some text (for example the firm contact details and headings).

Creating your invoice template

Step 1:
You will require your firm logo in .png file format. Insert this onto the template – it may need to be resized.

Most firms place this top left, however, your firm may have a different placement. It is recommended to edit the image file and use the layout option "In front of text". You may need to resize the logo image and you may also need to add or remove line returns before or after it. Your firm may have an image file containing all contact details or a separate image file that is used a page footer. Insert these as required.

Edit the firm's contact details in the header on the top right. Ensure that the header is deep enough to correctly display the firm's header. If your firm has a full letterhead image file in use, then insert this image file and delete the address placeholder text.

Step 2:
The font can be selected (across the entire document) and changed to your firm's standard font for correspondence.

Step 3:
The expenses and disbursements heading can be edited, if required. These figures are defaulted to display as GST Inclusive, if you want the figures to be GST Exclusive, please contact our support team.

Step 4:
Type in the full correct firm name to be displayed at the bottom of the invoice.

Step 5:
Edit the details **if** needed in the header on page 2 and the footer details on page 1.

Step 6:
Edit the payment information text box to suit your requirements.

Step 7:
Save your edited invoice template to your Desktop.

Step 8:
The final step is to upload your new invoice template into OnePractice. This is done under the Administration ribbon, Document Templates.

In the top Document Templates section, click the green plus to add a new template.

+ Use: - set this to Invoice
+ Name: - give the template a display name, this is the name that will be displayed in your system for this template
+ Click Browse, navigate to your Desktop and locate the invoice file that you saved
+ Double-click the file
+ Click 'Save & Close' to upload a copy of the template into your OnePractice system

NOTE: You can have multiple invoice templates ie a "paid" template, a template that includes the details of the time transactions on page 2. Please contact the OneLaw support team to assist with this.

Options:

+ A total invoice GST line containing the total invoice GST value can be added
+ Author name and/or title can be pulled through into the signing area with additional fields
+ Hyperlinks to websites for payment options ie credit card can be added

Creating your Reporting Statement

Repeat Steps 1 & 2 from the Invoice Template creation as above.

Step 3:
Type in the full correct firm name to be displayed at the bottom of the invoice

Step 4:
Edit the footer on page 1 and the header and footer on page 2 if needed

Step 5:
If needed you can edit the default wording for the various "Balance" lines i.e. Balance held to your credit, Balance Payable

Step 6:
Save your edited reporting statement template to your desktop

Step 7:
The final step is to upload your new reporting statement into OnePractice. This is done under the Administration ribbon, Document Templates.

In the top Document Templates section, click the green plus to add a new template.

- Use: - set this to Statement
- Name: - give the template a display name, this is the name that will be displayed in your system for this template
- Click Browse, navigate to your Desktop and locate the reporting statement file that you saved
- Double-click the file
- Click 'Save & Close' to upload a copy of the template into your OnePractice system

Editing OnePractice Templates

If further edits are required to the template:

- Access the template under the Administration ribbon, Document Templates
- Double-click on the Statement that you want to edit (in the top Document Templates area)
- Click View – this will launch your reporting statement template in Word. You can make the required edits, then repeat steps 6 and 7 from above