

Stage Five – Submit, authorise and post the bill

This is the final stage of the Billing Wizard.

From this stage you can authorise a bill for posting and then post the bill. The feature is only available if you have appropriate security rights.

Alternatively you can click on the **Finish** button in the Billing Wizard and save the bill as a draft bill.

Services	2,000.00
Tax	200.00
Total	2,200.00


SUBMIT A DRAFT BILL

Once a draft bill is complete, it needs to be submitted for authorisation.

Draft bills can be listed in various ways:


- From the **Bills** tab on the **Client** or **Assignment** page
- From the **Bills** approval list on the **Home Page**
- From **Billing** ▶ **Draft Bills** on the menu.

To submit a bill for authorisation:


1. Open the required bill from the **Bills** list.
2. Click the **Submit**  button from within the page.

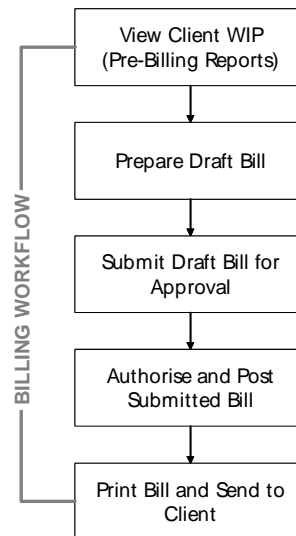
AUTHORISE AND POST A SUBMITTED BILL

To **authorise** an individual bill:

1. Open submitted draft bill or select it from the **Bills** approval list on the **Home Page**.
2. Click the green **Authorise**  button available within the page.

To **post** an individual bill:

1. Open the authorised bill.
2. Click the **Post**  button available within the page.



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AE PRACTICE MANAGER BILLING

Quick Reference Guide




DRAFTING A BILL USING THE WIZARD

Start the Billing Wizard

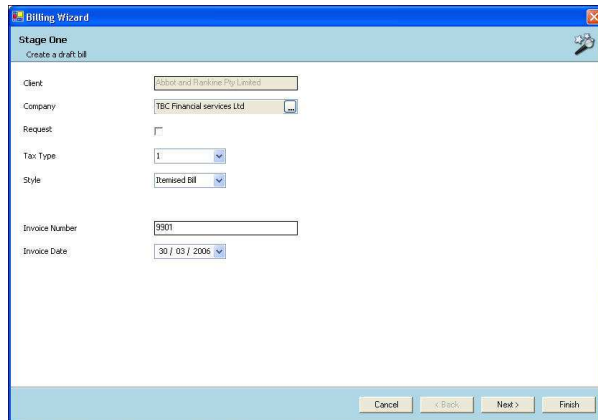
You can start the Billing Wizard from a number of locations including:

- The **Client** page
- The **Find Clients** page
- **Aged WIP** page.

1. Click the **Billing wizard** button  from the Task Bar to open the Stage One – Create a Draft Bill window.

Stage One – Create a Draft Bill

1. Type or select the appropriate details for the following:
 - **Company** (mandatory)
 - **Tax Type**
 - **Invoice Number** (the system will allocate a number if you leave this field empty)
 - **Invoice Style**
 - **Invoice Date.**



2. Click **Next** to proceed to the next step of the wizard.

Stage Two – Add Bill Amounts

1. To bill by assignment, click on the Assignment heading and drag it to the top. You can also bill (group by) client or employee or task.
2. Click on the field in the **Bill** column for the relevant assignment and enter the amount to be billed against the assignment (excluding GST).




	Unposted WIP	Posted WIP	Write-Off (On)	Bill	Carried Forward
Abbot and Rankine/Accounts (ABBOTRANK/ACC)		19,217.50			19,217.50
Abbot and Rankine/Asks (ABBOTRANK/ASK)	200.00	7,050.00		5,000.00	5,050.00
TOTAL	200.00	26,267.50	0.00	2,000.00	24,267.50

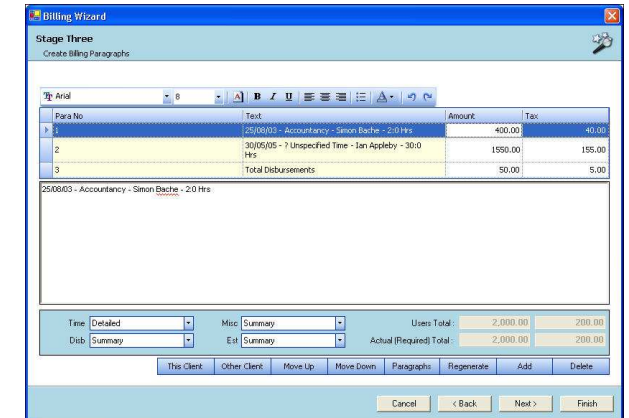
3. Click **Next** to proceed to the next step of the wizard.

Notes:

- You can either double click to prefill the total amount of WIP outstanding, or type in the amount of the Bill you wish to raise.
- You can right-click on an amount line to display a menu containing a range of options consisting of: WIP Inspector, Billing Explanation, Navigate Up/Down, Drill Down, Billing History, Show Field Chooser.
- If you enter an amount in the **Bill** field other than the full WIP amount, the remaining unallocated WIP will be carried forward to be allocated to the next bill.
- You can allocate a write-off by entering an amount into the **Write-Off** column.

Stage Three – Create Billing Paragraphs

1. The **Print Line Detail** area allows you to select how the billing paragraph text will appear in the invoice.
2. To add a new paragraph to your bill, select the existing paragraph line that you want to precede the new line and click the  button.
3. Complete the invoice details as required. For example, you can enter free text into the large text area.

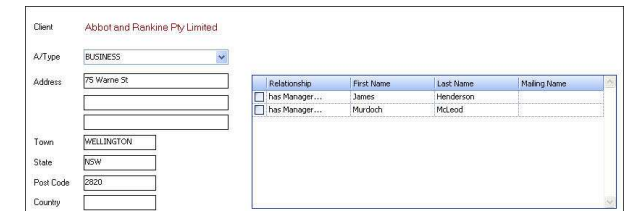


Para No	Text	Amount	Tax
1	25/0003 - Accountancy - Simon Beche - 2.0 Hrs	400.00	40.00
2	30/05/05 - 7 Unspecified Time - Ian Appleby - 30.0 Hrs	1550.00	155.00
3	Total Disbursements	50.00	5.00

4. Click **Next** to proceed to the next step of the wizard.

Stage Four – Set Billing Address

1. Select the required **A/Type** (address type) for the bill.



Relationship	First Name	Last Name	Mailing Name
<input type="checkbox"/> has Manager...	James	Henderson	
<input type="checkbox"/> has Manager...	Murdoch	McLeod	

2. Click **Next** to proceed to the next step of the wizard.